



# REVGEN: ATTRIBUTION TRACKER

## Implementation guide for successfully enabling the RevGen tracking solution.

Thank you for choosing the RevGen: Attribution Tracker! We have prepared this implementation guide to help you get the most out of your download. If at any point, you require assistance, please contact our team at [hello@revelyconsulting.com](mailto:hello@revelyconsulting.com).

After you've downloaded the package, follow the below steps to complete your configuration.

### STEP 1: CONFIGURING THE MARKETING FIELDS

The RevGen: Attribution Tracker includes all custom fields required in Salesforce Sales Cloud, but because it works with many different web-to-lead sources, additional field configuration in your marketing instance will be required. If you are using MCAE (fka Pardot), you will need to create the corresponding UTM fields on the Prospect record, and map them to your installed fields in Salesforce. You should have five fields created for UTM\_Source, UTM\_Medium, UTM\_Campaign, UTM\_Term, UTM\_Content. The RevGen: Attribution Tracker comes equipped with multi-touch attribution assets, so don't forget to create a duplicate version of those fields to capture first-touch data (don't worry - there's a flow configured that captures this automatically!)

Once your fields are created and synced correctly between MCAE and Salesforce, you can create your Form Handler. Add the UTM fields to your Form Handler, with the data input set to text. Do not mark the fields as required in MCAE, if you do so in the form handler configuration and have them required on your website - your form will not submit. When your Form Handler is complete, copy the unique form handler code and match it to the form tag on your site. It is important to ensure that you are using a *Form Handler*, and not an *MCAE Form*, as an iframe component is not compatible with this configuration.

### STEP 2: PARSING UTM PARAMETER DATA INTO FORM FIELDS

The form input fields that hold your UTM parameter data and pass it along to MCAE should be hidden on your webpage. Therefore, you'll need to use JavaScript to dynamically scrape the data from the webpage url



and place it in the appropriate form fields to send to MCAE. Insert the following JavaScript snippet as close to the closing `</body>` html markup tag as possible.

JavaScript

```
<script type="text/javascript">
// Parse the URL
function getParameterByName(name) {
name = name.replace(/\[/, "\\[").replace(/\]/, "\\]"); var regex =
new RegExp("[\\?&]" + name + "=(^&#)*"),
results = regex.exec(location.search);
return results === null ? "" :
decodeURIComponent(results[1].replace(/\+/g, " "));
}
// Give the URL parameters variable names
var source = getParameterByName('utm_source');
var medium = getParameterByName('utm_medium'); var campaign =
getParameterByName('utm_campaign'); var term =
getParameterByName('utm_term');
var content = getParameterByName('utm_content');
// Put the variable names into the hidden fields in the form.
// Find the appropriate hidden field via the input ID
document.getElementById("form-utms-content").value = content;
document.getElementById("form-utms-source").value = source;
document.getElementById("form-utms-medium").value = medium;
document.getElementById("form-utms-term").value = term;
document.getElementById("form-utms-campaign").value = campaign;
</script>
```

Once you've implemented the JavaScript snippet on your website, create a new hyperlink to your web page containing UTM parameters ([Campaign URL Builder](#)) and test the form to ensure data is mapping appropriately. You should see your UTM data captured on the MCAE Prospect, then on the corresponding Lead/Contact record in Salesforce.



### STEP 3: UPDATING PERMISSION SETS

The RevGen: Attribution Tracker includes more than ten base reports, and a customizable dashboard to track performance on leads and opportunities across the funnel. To view and edit reports, a System Administrator will need to assign all applicable users the "RevGen Permission Sets" Permission Set in Salesforce. Likewise, the new RevGen Page Layouts can be assigned for the Contact, Lead and Opportunity standard objects for users who should have visibility to these fields.

As leads from your advertising campaigns start to convert, you will be able to follow (and attribute) the lead's progression through the Sales funnel. Optimize ad performance based on real-time Sales insights and plan with trends surfaced offer time.

All RevGen: Attribution Tracker downloads include an hour of free technical support. Contact [hello@revelyconsulting.com](mailto:hello@revelyconsulting.com) to schedule.