CRM Perks

- Tracking UTMs in CRM Perks Form

Tracking UTMs in CRM Perks Form

Welcome to the documentation page for the **HandL UTM Grabber** plugin designed for seamless UTM tracking in CRM Perks Form. This document provides step-by-step instructions to help you integrate and track UTM parameters accurately with your forms.

Overview

The **HandL UTM Grabber** plugin allows you to automatically capture UTM parameters from URLs and store them as part of form submissions in CRM Perks Form. This is crucial for understanding the source and effectiveness of your marketing campaigns.

Prerequisites

- **WordPress**: Ensure your website is running on WordPress.
- **CRM Perks Form**: Have the form builder installed and set up on your WordPress site.
- **CRM Entries**: To be able to save the submissions
- **HandL UTM Grabber Plugin**: Ensure the plugin is installed and activated.

Step-by-Step Integration

Step 1: Add Hidden Fields to Your Form

To begin tracking UTM parameters, you'll first need to add hidden fields to your CRM Perks Form. Each field should follow the naming conventions outlined in our documentation.

Required Fields

- `utm_source`
- `utm_medium`
- `utm_campaign`
- `utm_term`
- `utm_content`

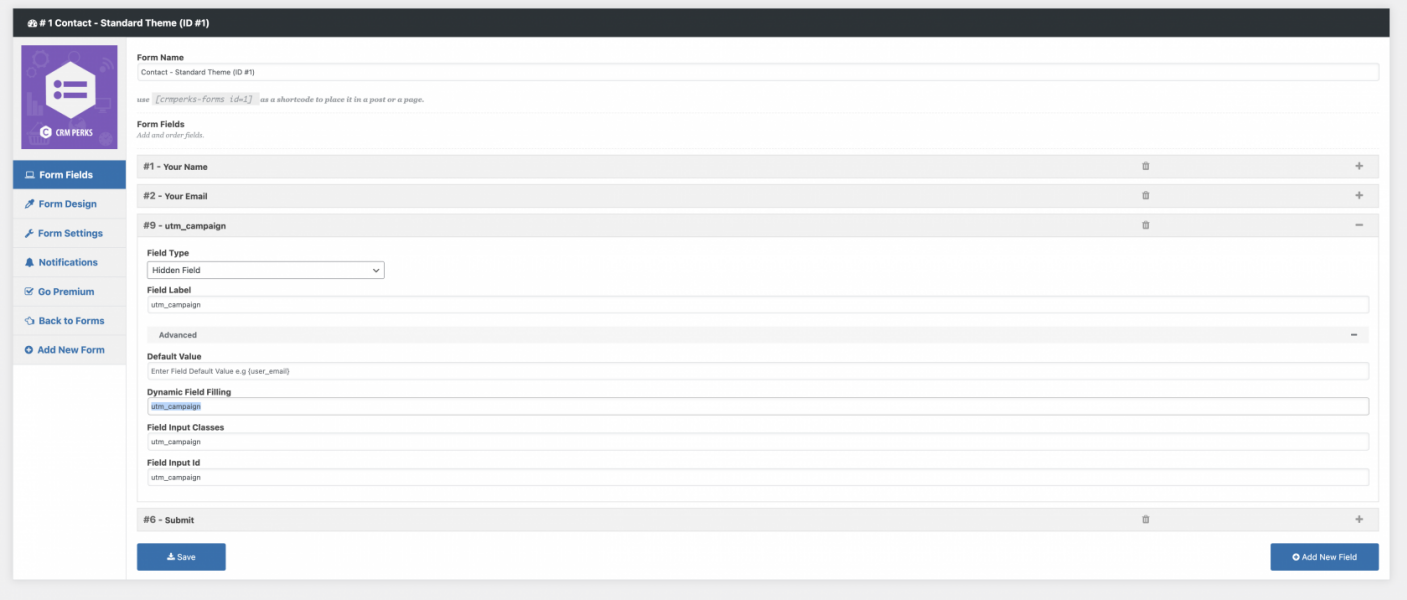
You can find detailed instructions and examples on naming conventions in our shortcodes guide.

Step 2: Match Field Naming Conventions

To ensure accurate data capture, make sure the newly added hidden fields in your form match our naming conventions. This includes accurately matching:

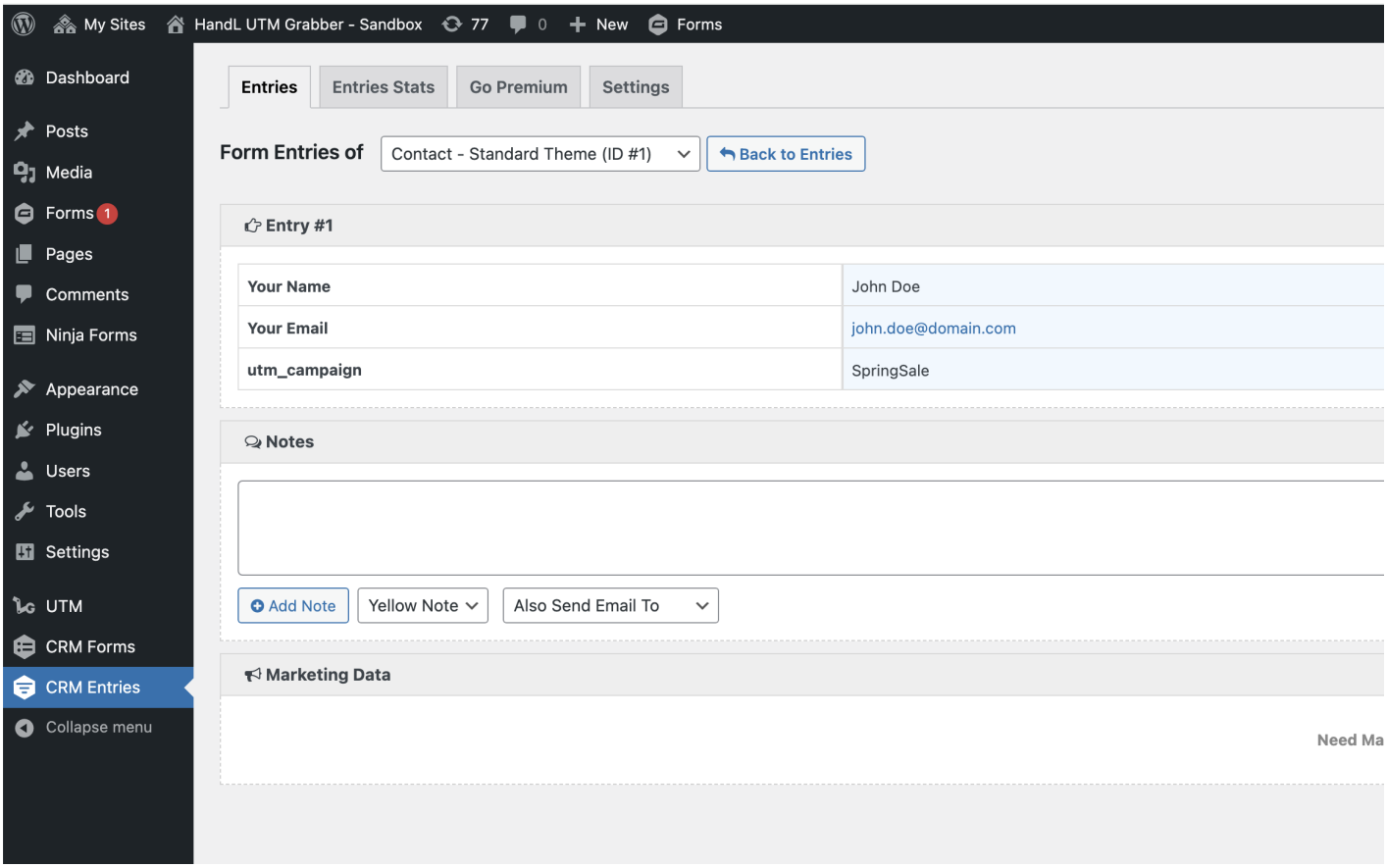
- **Field Label**
- **Dynamic Field Filling**
- **Field Input Classes**
- **Field Input Ids**

Using consistent naming helps avoid discrepancies and ensures data flows smoothly from your forms to your CRM.



Step 3: Verify Setup

Once the fields are added, the data should automatically populate during form submissions. Verify that the setup is correct by conducting a few test submissions and checking if the UTM parameters are being captured correctly.



Tips for Accurate Tracking

- **Regularly Check Configurations**: Ensure your form fields retain consistent naming structures to accommodate any changes made in your marketing URL parameters.
- **Conduct Regular Tests**: Periodically test with unique UTM parameters to ensure continued accurate capturing of data.

Troubleshooting

- **Data Not Captured**: Double-check that all hidden fields are named exactly as specified in our naming conventions.
- **Incorrect Data**: Ensure no other form elements interfere with the UTM data fields.

For further assistance, feel free to contact our support team.

Conclusion

By following these steps, you can successfully implement UTM tracking in your CRM Perks Form using the HandL UTM Grabber plugin. Accurate tracking of campaign data helps optimize marketing strategies and maximize ROI.