

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.
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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.

The screenshot shows the 'Form Fields' configuration page for a form titled '#1 Contact - Standard Theme (ID #1)'. The left sidebar contains navigation links: 'Form Fields' (active), 'Form Design', 'Form Settings', 'Notifications', 'Go Premium', 'Back to Forms', and 'Add New Form'. The main content area displays a list of fields: '#1 - Your Name', '#2 - Your Email', and '#3 - utm_campaign'. The '#3 - utm_campaign' field is expanded, showing its configuration: 'Field Type' is set to 'Hidden Field', 'Field Label' is 'utm_campaign', and the 'Advanced' section is open. The 'Advanced' section includes 'Default Value' (with a placeholder 'Enter Field Default Value e.g. (user_email)'), 'Dynamic Field Filling' (set to 'utm_campaign'), 'Field Input Classes' (set to 'utm_campaign'), and 'Field Input Id' (set to 'utm_campaign'). At the bottom, there is a '#6 - Submit' button and a '+ Add New Field' button.

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.

The screenshot displays the 'CRM Entries' section of the Ninja Forms plugin interface. The left sidebar contains navigation links: Dashboard, Posts, Media, Forms (1), Pages, Comments, Ninja Forms, Appearance, Plugins, Users, Tools, Settings, UTM, CRM Forms, CRM Entries (active), and Collapse menu. The main content area has tabs for Entries, Entries Stats, Go Premium, and Settings. Under the 'Entries' tab, there's a section for 'Form Entries of' with a dropdown menu set to 'Contact - Standard Theme (ID #1)' and a 'Back to Entries' button. Below this, 'Entry #1' is shown with a table of submitted data:

Your Name	John Doe
Your Email	john.doe@domain.com
utm_campaign	SpringSale

Below the table is a 'Notes' section with a text area, an 'Add Note' button, a 'Yellow Note' dropdown, and an 'Also Send Email To' dropdown. At the bottom, there's a 'Marketing Data' section with a table that is partially visible, showing a 'Need Ma' entry.

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.

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