

HOW TO INTEGRATE SALESFORCE

# Sales Cloud and Google Analytics 360



CloudKettle

This guide examines how the Sales Cloud and Google Analytics 360 integration can be leveraged to gain better insights to inform marketing strategy and performance. **This is a must-read if you are a data-driven marketer who has, or is considering, purchasing Google Analytics 360.**

*Read this guide to learn:*

1. How Sales Cloud data in Google Analytics 360 can improve Marketing's performance.
2. What is required to execute on the connection between Sales Cloud and Google Analytics 360.
3. How to optimize website and Demand Gen performance further down the funnel with actual Sales data.

## Why Enable the Sales Cloud and Google Analytics 360 Integration

Enabling the Sales Cloud and Google Analytics 360 integration provides Marketing access to offline insights to better inform the overall marketing strategy.

For example, incorporating Lead Status data from Salesforce in Google Ads gives marketing teams a key data point to build audiences and optimize against. Better audiences in Google means better targeting in Google's Ad ecosystem. This empowers your marketing team to make better decisions in Google Ads with offline conversion data, and exclude customers or disqualified leads from remarketing audiences.

This integration also allows Marketing to optimize web performance and Demand Gen further down the funnel with offline data. Tracking offline conversions helps marketing teams make hard calls when cost per lead (CPL) conversion in Google Ads goes up. With offline data, your team can measure Ad efforts against actual qualified leads and iterate on their efforts.

**Leveraging offline data from Sales Cloud in Google Analytics 360 also allows your marketing team to:**

- Optimize your website against MQLs and SQLs instead of all visitors and exclude customers (especially end users).
- Identify how Opportunity carrying contacts behave on the website (for example, the pricing page).
- Customize your website with Google Optimize based on custom audiences.

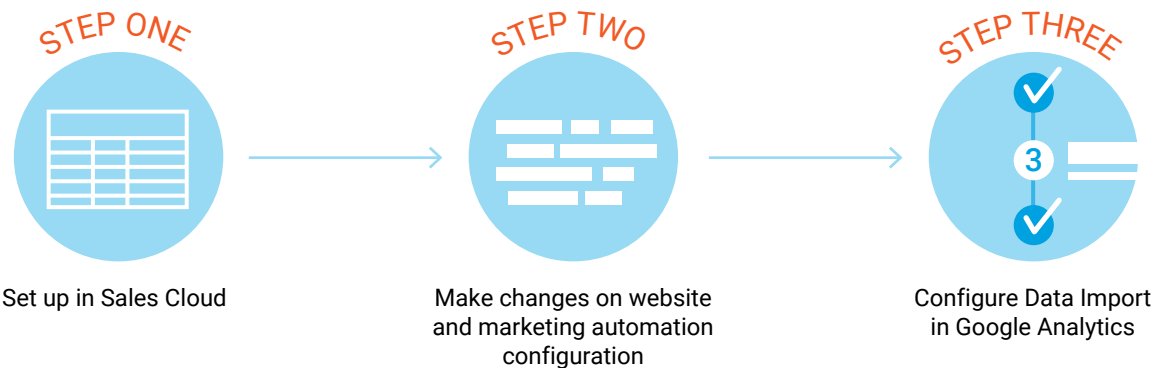
### How the Sales Cloud and Google Analytics 360 Integration Works



# How to Enable the Sales Cloud and Google Analytics 360 Integration

Now let's talk about how to leverage the Sales Cloud and Google Analytics 360 integration.

**There are three steps to enable the integration:**



STEP

1

## Set-Up In Sales Cloud

Start by creating new fields on the Lead and Opportunity objects in Sales Cloud. We recommend you use a Dedicated Integration User for this. If you don't know what an Integration User is, check out this post: [Why You Need A Dedicated Salesforce Integration User](https://bit.ly/integration_user_how). (bit.ly/integration\_user\_how)

Integration User Object Access
<a href="#">Lead</a>
<a href="#">Opportunity</a>
<a href="#">Product2 (Products)</a>
<a href="#">Pricebook2 (Price Books)</a>

The Salesforce Integration User, in this case, will need broad access to modify the Lead, Opportunity, Product2 (Products), and Pricebook2 (Price Books) objects.

What if you'd like to pass Lead data but don't need Opportunity data visible in Google Analytics 360? This is a common use case, however, it's not possible to only pass Lead data. The integration will fail and stop syncing if the Opportunity object is not visible.

Once the Integration User is configured, ensure Field History Tracking for the Lead Status and the Opportunity Stage fields are enabled and grant Read/Write permissions to the Integration user.

## Identify Google Analytics User Tracking Scope: Client ID vs. User ID

When importing data from Google Analytics 360 into Salesforce, you must decide the user tracking scope. Client ID is required for this integration, however, you may also choose to integrate User ID.

## Create and Map New Custom Fields in Sales Cloud

Now three new custom fields need to be added to the Lead and Opportunity objects in Sales Cloud to store Google Analytics 360 tracking data. These fields are: GAClientID, GAUSERID, and GATRACKID. Then the newly created lead fields need to be mapped to the Opportunity fields.

New Fields		
Field Name	API Name	Field Length
GAClientID	GAClientID__c	255
GAUSERID	GAUSERID__c	255
GATRACKID	GATRACKID__c	255

STEP

2

## Website & Marketing Automation Configuration

This next step ensures that when a form is submitted, an anonymous Google ID is tied to that lead that exists in Sales Cloud. To do this, add GAClientID and GATRACKID as hidden fields to all website/marketing automation forms to populate the Client ID. Use Google Tag Manager to execute this for easier QA, testing, and ongoing maintenance.

```
<div class="FormRow">
  <input type="hidden" name="gaClientID" value="2025524622.1546998446">
</div>
<div class="FormRow">
  <input type="hidden" name="gaTrackID" value="UA-3999223-2">
</div>
```

\_ga Cookie

</script>

STEP

3

## Configure Data Import in Google Analytics

Now it's time to validate the connection between the platforms. This is the most difficult part of the process, however, luckily there is a Trailhead to help walk you through the steps. Complete the [Google Analytics 360 Integration for Sales Cloud](#) trail before following the next six steps to authenticate the Sales Cloud to Google Analytics 360 connection:

## 3.1 Configure Data Import in Google Analytics

To set up the integration, navigate to Data Import in Google Analytics 360 and select the 'Salesforce' option to import data about offline conversions from Sales Cloud.

The screenshot shows the 'Create Data Set' wizard in Google Analytics 360. The left sidebar contains the 'ADMIN' menu with 'Property' selected. The main content area is titled 'Create Data Set' and shows 'Step 1: Data Set type'. Below the title, it says 'Select one of the data types below. Learn more about data types. All uploads must adhere to the Data Upload Policy.' The 'CRM DATA' section has the 'Salesforce' option selected. Other sections include 'HIT DATA IMPORT', 'EXTENDED DATA IMPORT', and 'SUMMARY DATA IMPORT'. At the bottom, there are 'Continue' and 'Cancel' buttons.

## 3.2 Authorize Sales Cloud Connection

Find a Sales Cloud Administrator who can set up a link between Google Analytics 360 and Sales Cloud and complete the Authentication step.

The screenshot shows the 'Create Data Set' wizard in Google Analytics 360, Step 2: Data Set details. The left sidebar is the same as in Step 1. The main content area is titled 'Create Data Set' and shows 'Step 2: Data Set details'. Below the title, it says 'Salesforce credentials'. A dropdown menu shows 'your\_sync\_user@cloudkettle.com'. Below this are 'Continue' and 'Cancel' buttons. The 'Tracking fields setup' section has a green checkmark and shows a table with 'Analytics ID type' and 'Salesforce Lead: Opportunity field mapping'. The 'Milestones selection' section has a green checkmark and shows 'Selected Lead Milestones: Open, Marketing Qualified, Qualified Out' and 'Selected Opportunity Milestones: Prospecting, Negotiation, Closed Won, Closed Lost'. The 'Attributes and Product data setup' section has a green checkmark and shows 'Attributes data import: No optional fields are mapped.' and 'Product data import: Product data import is disabled'. The 'Data Source schedule' section has a green checkmark and shows 'Every hour at 0 minutes in timezone America/Los\_Angeles'.

Analytics ID type	Salesforce Lead: Opportunity field mapping
Tracking ID	GATRACKID: GATRACKID
Client ID	GACLIENTID: GACLIENTID
User ID	GAUSERID: GAUSERID

## 3.3 Complete tracking fields setup

Edit 'Tracking Fields Setup' to map Google Analytics IDs with the new Lead and Opportunity fields.

**Tracking fields setup**

Select Salesforce fields to map to Google Analytics IDs.  
Please note that both Analytics Tracking ID, Analytics Client ID are required and Analytics User ID is optional. [Learn more](#)

Analytics ID type	Salesforce Lead: Opportunity field mapping	Preview
Tracking ID ⓘ	GATRACKID: GATRACKID	<a href="#">Preview values</a>
Client ID ⓘ	GACLIENTID: GACLIENTID	<a href="#">Preview values</a> ⓘ
User ID ⓘ	GAUSERID: GAUSERID	No values to preview

[Continue](#) [Cancel](#)

## 3.4 Select Lead and Opportunity milestones

**3.4.1:** Select the Lead and/or Opportunity milestone(s) that you want to import as Events from your Sales Cloud account to Google Analytics 360.

**Milestones selection**

Select Lead milestones to import  
**8 selected** ▼

Select Opportunity milestones to import  
**6 selected** ▼

[Continue](#) [Cancel](#)

### 3.4.2: Map any additional custom fields you want to import from the Sales Cloud Lead and Opportunity objects to Google Analytics 360.

ADMIN USER

Property [+ Create Property](#)

Egencia

Property Settings

< > Tracking Info

Data Deletion Requests

PRODUCT LINKING

Google Ads Linking

AdSense Linking

Ad Exchange Linking

Salesforce Marketing Cloud

Google Marketing Platform

Optimise and Tag Manager Linking

All Products

Postbacks

Create Data Set Create Data Source

✓ Salesforce credentials Edit  
Salesforce credentials: your\_sync\_user@cloudkettle.com

✓ Tracking fields setup Edit

Analytics ID type	Salesforce Lead: Opportunity field mapping
Tracking ID ⓘ	GATRACKID: GATRACKID
Client ID ⓘ	GACLIENTID: GACLIENTID
User ID ⓘ	GAUSERID: GAUSERID

✓ Milestones selection Edit  
Selected Lead Milestones: Open, Marketing Qualified, Qualified Out  
Selected Opportunity Milestones: Prospecting, Negotiation, Closed Won, Closed Lost

4 Attributes and Product data setup Edit

Attributes data import

Select custom dimensions/metrics ▾

Analytics custom dimension/metric	Salesforce field name	Preview
There is no data for this view.		

Product data import

☐ Enable Product data import

Continue Cancel

## 3.5 Create data source schedule

Define the frequency of 'Data Import' from Sales Cloud (hourly is recommended).

ADMIN USER

Property [+ Create Property](#)

Egencia

Property Settings

< > Tracking Info

Data Deletion Requests

PRODUCT LINKING

Google Ads Linking

AdSense Linking

Ad Exchange Linking

Salesforce Marketing Cloud

Google Marketing Platform

Optimise and Tag Manager Linking

All Products

Postbacks

Audience Definitions

Create Data Set Create Data Source

1 2

✓ Salesforce credentials Edit  
Salesforce credentials: your\_sync\_user@cloudkettle.com

✓ Tracking fields setup Edit

Analytics ID type	Salesforce Lead: Opportunity field mapping
Tracking ID ⓘ	GATRACKID: GATRACKID
Client ID ⓘ	GACLIENTID: GACLIENTID
User ID ⓘ	GAUSERID: GAUSERID

✓ Milestones selection Edit  
Selected Lead Milestones: Open, Marketing Qualified, Qualified Out  
Selected Opportunity Milestones: Prospecting, Negotiation, Closed Won, Closed Lost

✓ Attributes and Product data setup Edit

Attributes data import

No optional fields are mapped.

Product data import

Product data import is disabled

5 Data Source schedule Edit

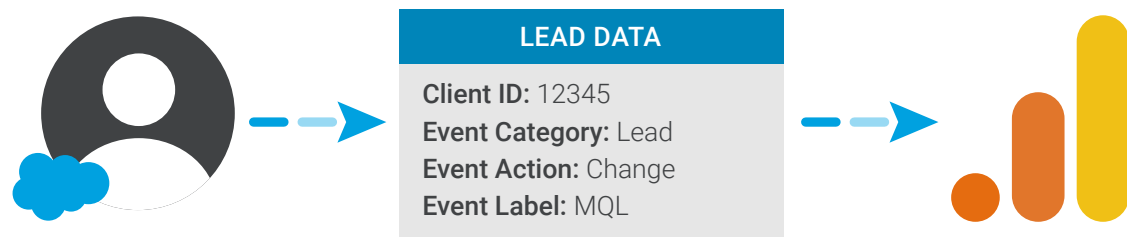
Receive data every 1 hour at 00 minutes in timezone America/Los\_Angeles ▾

Save Cancel

## 3.6 Test the integration

Fetch new data from 'Data Import' to verify the upload was successful. You may choose to download the upload and review data (optional).

After the connection is authenticated, the image below demonstrates how Sales Cloud milestones appear in Google Analytics 360.



## How to Optimize Website Performance with Actual Sales Data

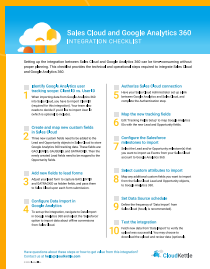
By enabling the Sales Cloud and Google Analytics 360 integration, marketing can advertise to custom audiences through the lead lifecycle, and optimize web performance and Demand Gen further down the funnel.

First, let's look at how this integration can be used to improve website performance. Now your team can optimize digital marketing campaigns for sales that occur offline, instead of just optimizing for form submissions on your site.

Your website can also be customized to show things such as a customer service showcase using Optimize 360. For example, you can build a segment of customers who have filled out an online lead form but have not yet scheduled a call with a sales agent. Once this audience is created, you can target them with digital ads or custom site messaging to encourage them to book a meeting with a sales agent.

## How to Optimize Demand Gen Performance with Actual Sales Data

Next, let's look at how this integration can be used to improve Demand Gen performance. Now your team is also able to create more accurate cross-channel attribution models to better understand what channels drive offline sales. For example, with some analysis, you may uncover that paid search and email drive more offline goals than social. This information can be used to adjust your investment for paid search and email and hopefully increase your return on ad spend (ROAS).



Get the  
Sales Cloud  
and Google  
Analytics 360  
Integration  
Checklist  
which captures step  
one through three.

DOWNLOAD NOW

[bit.ly/checklistga360](https://bit.ly/checklistga360)



Catch CloudKettle's Dreamforce session on **How to Enable a Deeper Connection Between Sales Cloud and Google Analytics 360**



WATCH NOW

[bit.ly/sfga360](https://bit.ly/sfga360)

Lastly, the integration allows all Analytics 360 data, including imported Sales Cloud data, to be sent directly to Google Cloud's BigQuery. BigQuery is a fast, highly scalable, and cost-effective cloud data warehouse that allows for easy analytics, and includes built-in machine learning. This means your team can do advanced analysis, build new attribution models, and integrate with additional apps right from Google BigQuery.

## How to Leverage Customer Funnels in Google Analytics 360

The most effective way to get value from the Sales Cloud and Google Analytics 360 integration is to explore your offline Sales Cloud data directly in Analytics 360. With Custom Funnels, your team can visualize what percentage of leads submitted online were converted to an in-person consult, and then which of those went on to purchase. These visual reports help your team identify drop-off points so that you can fine-tune the customer experience and improve marketing performance.

To take immediate action from Custom Funnels, you can simply click "Create new segment" in Google Analytics 360 to build an audience of people who have dropped off from a particular stage. Once that audience segment is built, it can be used for media targeting, site personalization, or qualitative research.

## Wrap Up

We hope this guide provided your team with actionable insight on the benefits of leveraging the Sales Cloud and Google Analytics 360 integration and the steps necessary to connect the two platforms. If you have any questions about this guide or the integration, reach out today.



### Request a Free Consultation.

We love helping **enterprise organizations** empower their marketing teams with Sales Cloud to drive revenue growth.