



Sales Cloud and Google Analytics 360 INTEGRATION CHECKLIST

Setting up the integration between Sales Cloud and Google Analytics 360 can be time-consuming without proper planning. This checklist provides the technical and operational steps required to integrate Sales Cloud and Google Analytics 360.

1 Identify Google Analytics user tracking scope: Client ID vs. User ID

When importing data from Google Analytics 360 into Sales Cloud, you have to import Client ID (required for this integration). Your team also needs to decide if you'd like to import User ID (which is optional to include).

2 Create and map new custom fields in Sales Cloud

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.

3 Add new fields to lead forms

Adjust your lead form to capture GACLIENTID and GATRACKID as hidden fields, and pass them to Sales Cloud upon each form submission.

4 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.

5 Authorize Sales Cloud connection

Have your Sales Cloud Administrator set up a link between Google Analytics and Sales Cloud, and complete the Authentication step.

6 Map the new tracking fields

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

7 Configure the Salesforce milestones to import

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

8 Select custom attributes to import

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

9 Set Data Source schedule

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

10 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).

Have questions about these steps or how to get value from this integration?
Contact us at hello@cloudkettle.com

