1. Matomo connector for Creatio

1.1. Use cases

Use imported Matomo data associated with specific Creatio contacts to personalize product and service offers, as well as improve your website UX. For example:

- Evaluate which products or services interest the contact the most.
- Create detailed marketing reports using filters by contact channels, traffic sources, and location.
- Analyze which site pages users visit the most or on which pages they spend the most time.
- Review which OS and devices your customers use the most and optimize the site accordingly.

1.2. Operation principles

Creatio imports Matomo data of a specific contact recorded over the past year once the contact is identified. This is done in several ways:

- The standard contact identification mechanism is executed after a user **submits a form** on a landing page that involves contact creation. For example, "Contact registration form."
- The contact email is used after a user **follows a link in a bulk email** sent with Creatio Marketing tools.

If the contact is identified after they **submit a form**, Creatio imports Matomo data immediately. If the contact is identified after they **follow a link in a bulk email**, Creatio imports Matomo data as part of the next update scheduled by the "Matomo data synchronization for contacts by userId" business process.

By default, Creatio updates most Matomo data of identified contacts once a day. To modify the update time and frequency, edit the start timer of the "Matomo data synchronization for contacts by userId" business process. Matomo data passed with form submissions is always updated in real time.

View the imported data on the [*Engagement*] tab of Creatio contact page.

1.3. Notes and restrictions

Since version 7.18.3, Creatio uses a <u>unified contact identification mechanism</u> for form submissions on landing pages that involve contact creation. **Matomo connector for Creatio** application requires the unified mechanism. To use the application with landing pages set up in earlier Creatio versions, <u>update their contact identification mechanism</u>.

The contact identification procedure has the following **restrictions**:

- If a user enters data of a different contact in the form, Creatio associates Matomo data with the contact whose data was specified.
- If a user submits multiple site forms as part of a single session and enters different contact data in each submission, Creatio associates Matomo data with the contact whose data was specified in the earliest submission.
- If a user forwards a bulk email and the new recipient follows the link, Creatio associates Matomo data of the user who followed the link with the original recipient.

2. Setup

2.1. Compatibility

Product: all Creatio products. The identification of contacts who follow links in bulk emails is available only for products that contain Marketing Creatio.
Version: 7.18.3 and later.
DBMS: DBMS independent.
Platform: .NET Framework, .Net Core

2.2. Installation

To install **Matomo connector for Creatio**, perform the setup in Matomo and Creatio.

Setup in **Matomo**:

1. Sign up for <u>Matomo Cloud</u>.
2. Go to [*Administration*] → [*Personal*] → [*Security*] → [*Auth tokens*] and retrieve the Auth token.

Setup in **Creatio**:

1. Go to the [*Installed applications*] section and install the **Matomo connector for Creatio** application.
2. Go to the [*System settings*] section → "Matomo connection settings" folder.

3. Specify the Matomo analytics URL in the [*Default value*] field of the "Address of Matomo API service" (the "MatomoAPIAddress" code) system setting.
To retrieve the URL, go to Matomo dashboard and copy the URL in the address bar. The URL must end in ".matomo.cloud."
4. Specify the Matomo Auth token in the [*Default value*] field of the "Matomo API key" (the "MatomoAPIKey" code) system setting.
At this point, the identification of contacts who follow links in bulk emails is set up. To set up the identification of users who submit forms, proceed to step 5.

Setup on **your landing page**:

If you use **web-to-object mechanism** for integration your landing page with Creatio:
1. Go to the [*Landing pages and web forms*] section in Creatio → open the relevant landing page record.
2. Copy the code snippet in the [*STEP 2. Copy the code and configure and map the fields*] block.
3. Replace the old snippet with the new snippet in the source code of the relevant landing page.

If you use **webhooks** for integration your landing page with Creatio:
1. Add additional script to the relevant landing page:

```
<script>
function createOrReplaceInput(inputName, inputValue, formSelector, currentForm) {
        var existingInput = jQuery(formSelector + " input[name='" + inputName +"']")[0];
        if (existingInput) {
                existingInput.value = inputValue;
        } else {
                var newInput = document.createElement('input');
                newInput.setAttribute('type', 'hidden');
                newInput.setAttribute('name', inputName);
                newInput.setAttribute('value', inputValue);

                currentForm.appendChild(newInput);
        }
}
/* The function below generates individual VisitorId and sync it with Matomo. */
function defineVisitor() {
        _paq.push([ function () {
        var visitorId = this.getVisitorId();
        var currentUrl = window.location.href;

        //foreach form add hidden fields with names: TrackingUserId
        var formsCollection = document.getElementsByTagName('form');
        for(var i = 0; i < formsCollection.length; i++) {
        var formSelector = "";
        if (formsCollection[i].id) {
        formSelector = "#"+formsCollection[i].id;
        } else if(formsCollection[i].name) {
        formSelector = "form[name='" + formsCollection[i].name + "']";
        }
                createOrReplaceInput("TrackingUserId", visitorId, formSelector, formsCollection[i]);
                createOrReplaceInput("PageUrl", currentUrl, formSelector, formsCollection[i]);
        }
        }])
}
jQuery(document).ready(defineVisitor);
</script>
```

2. Add extra hidden fields `TrackingUserId` and `PageUrl` to the relevant landing page.
   - TrackingUserId is a unique Matomo ID. Matomo generates this parameter when a user opens a landing page. The webhook that is sent when a user fills out the landing page form has the TrackingUserId parameter. JavaScript script from p.1 populates the parameter automatically.
   - PageUrl is a full address of a landing page from which a user fills out a form. Matomo generates this parameter when a user opens a landing page. The webhook that is sent when a user fills out the landing page form has the PageUrl parameter. JavaScript script from p.1 populates the parameter automatically.

3. Imported data reference

Creatio imports web session and web action data from Matomo, as well as adds Matomo data to web form submissions.

i. Web session data

1. **Session start date and duration** (in seconds).
2. **Geographic location**.
   a. **Country**: taken from the [*Countries*] lookup. Developers can expand the lookup.Creatio does not expand it if the imported data contains values missing from the lookup.
   b. **Region**: taken from the [*States/provinces*] lookup. You can expand the lookup. Creatio does not expand it if the imported data contains values missing from thelookup.
   c. **City**: taken from the [*Cities*] lookup. Available values are filtered by the specified[*Countries*] and [*States/provinces*] lookup values. You can expand the lookup. Creatio does not expand it if the imported data contains values missing from the lookup.
   d. **Location**. Uses GPS coordinates.
3. **The number of actions** taken as part of the web session.
4. **Traffic source**.
   a. **Source**: taken from the [*Lead sources*] lookup. You can expand the lookup. The [*Default channel*] field of the lookup record is required. Creatio does not expand thelookup if the imported data contains values missing from the lookup.

The imported data is matched to the lookup values based on the following rules, from higher to lower priority:
   i. If the data includes the **utm_source** code and the lookup of the [*Source code*]object maps the tag to a [*Lead sources*] lookup record, Creatio populates the [*Source*] field with the mapped lookup record.

Note. To edit the lookup of the [*Source code*] object, add the lookup manually in the [*Lookups*] section.

   ii. If the data includes the **utm_campaign** code and the lookup of the [*Sourcecode*] object maps the tag to a [*Lead sources*] lookup record, Creatio populates the [*Source*] field with the mapped lookup record.

           iii. If the first two rules do not apply, Creatio uses [lead source identification rules](#)4 and 5.

        b. **Channel**: taken from the [*Lead channels*] lookup. You can expand the lookup. Creatio does not expand it if the imported data contains values missing from thelookup.

If the imported data includes the **utm_medium** code and the lookup of the [*Channel code*] object maps the tag to a [*Lead channels*] lookup record, Creatio populates the [*Channel*] field with the mapped lookup record.

Note. To edit the lookup of the [*Channel code*] object, add the lookup manually in the [*Lookups*] section.

        c. **Traffic source type and name**: taken from the [*Referral traffic source*] lookup. Developers can expand the lookup. Creatio expands it if the imported data containsvalues missing from the lookup.

5. **Referrer keyword**.
6. **Page referrer URL**.
7. **Marketing codes**.
    a. **utm_id**
    b. **utm_source**
    c. **utm_medium**
    d. **utm_campaign**
    e. **utm_term**
    f. **utm_content**
8. **Additional data**.
    a. **Platform** (OS)
    b. **Device**
    c. **IP address**

ii. Web action data

1. **The ID of the relevant web session**.
2. **Action start date**.
3. **Action type**: taken from the [*Web tracking action types*] lookup. The imported data is mapped to lookup records via the [*Matomo Code*] field. The values of the [*Name*] field canbe arbitrary but cannot be localized.

Developers can expand the lookup. Creatio expands it if the imported data contains values missing from the lookup. The [*Name*] and [*Matomo Code*] fields of the lookup records added by Creatio are populated automatically.

4. **Web page**: taken from the lookup of the [*Web page*] object. The imported data is matched tothe [*Name*] and [*Page URL*] lookup columns. Creatio expands the lookup if the imported data contains values missing from the lookup.

Note. To edit the lookup of the [*Web page*] object, add the lookup manually in the [*Lookups*] section.

5. **Page URL address**: taken from the lookup of the [*Web page*] object. The imported data ismatched to the [*Name*] and [*Page URL*] lookup columns. Creatio expands the lookup if theimported data contains values missing from the lookup.

iii. Web form submission data

By default, Creatio enhances the web form submissions with Matomo data passed from the landing page explicitly. For example, UTM codes. If you want to add more data to submissions, map the data in the web form settings. Learn more in Creatio user documentation: [Connect your website landing page to Creatio](#).