Using Google Tag Manager With LeadsRx – Rev 2.0

Google Tag Manager (GTM) can be used for two primary purposes with LeadsRx:

1. Our Universal Conversion Tracking Pixel can be installed on a website using GTM
2. Conversion events (like form completions) can be captured and sent to LeadsRx using GTM

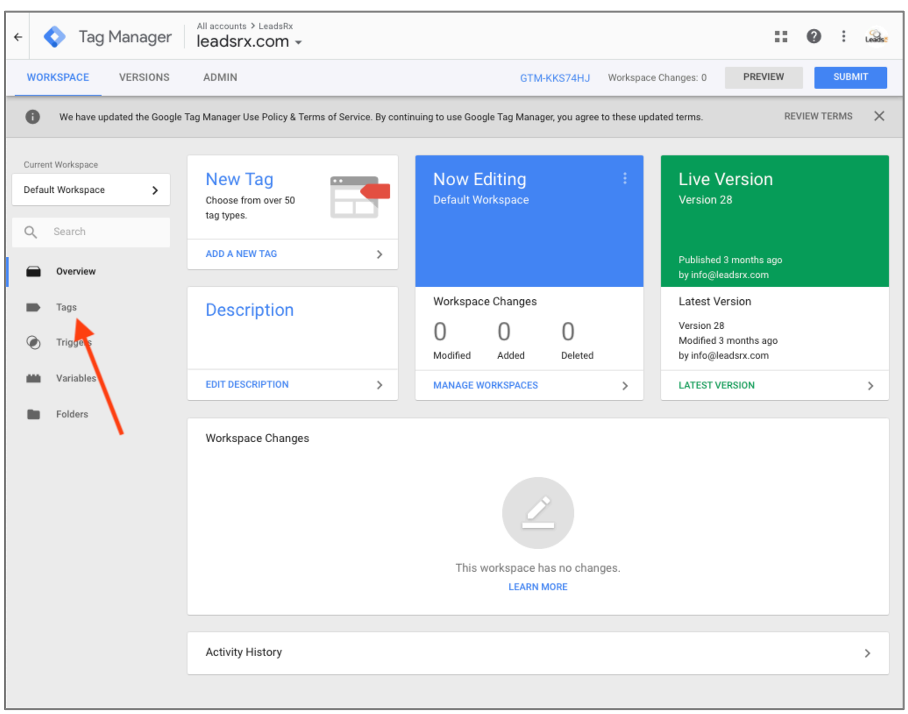
There are dozens of articles on the internet about how to setup and use GTM, and it's important to review some of this material in conjunction with this integration overview. Here's a great place to start:

https://developers.google.com/tag-manager/quickstart

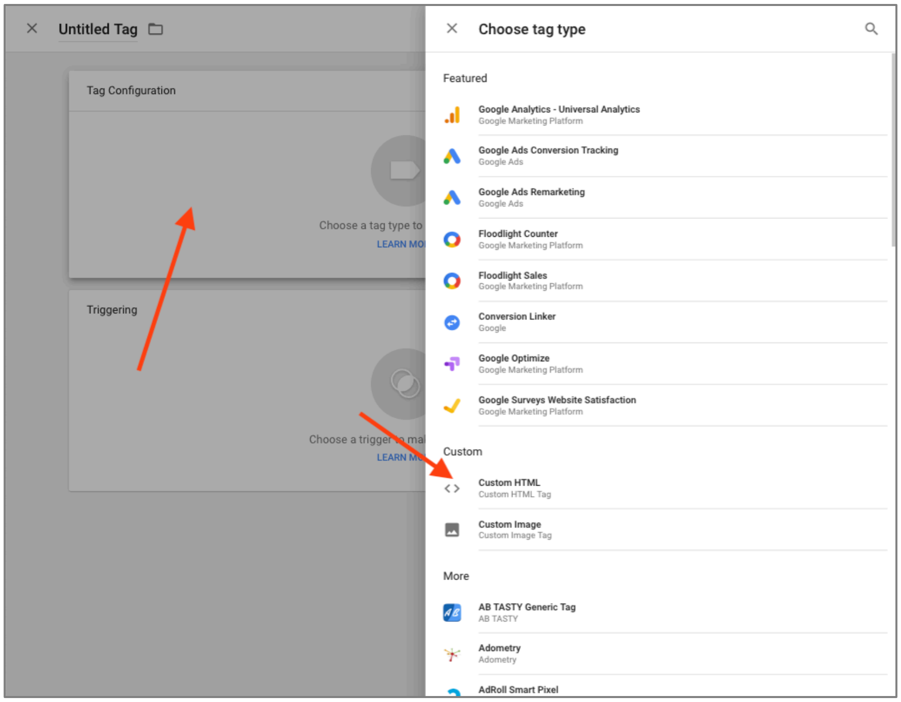
Installing the LeadsRx Universal Conversion Tracking Pixel

The LeadsRx pixel should be installed on all pages of a website. This ensures that no matter which page a visitor first arrives upon, all tracking parameters and referring information will be passed along to LeadsRx for proper attribution. Here are the basic steps to install our pixel using GTM:

1. Within GTM, click on Tags in the left navigation area:

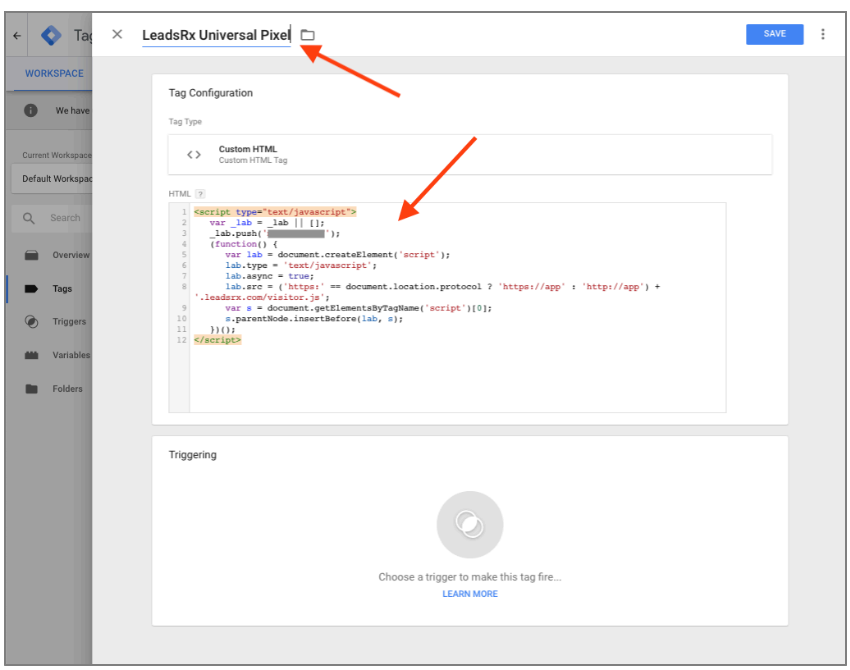


2. On the next page, add a new tag by clicking the NEW button. Then, click on the Tag Configuration block and select Custom HTML for the tag type:

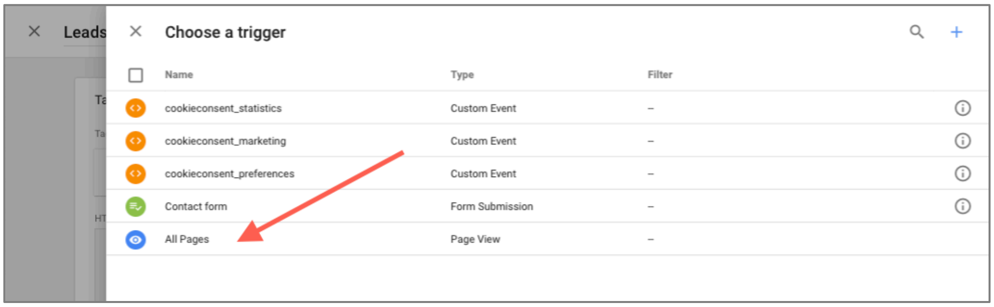


3. Copy and paste the LeadsRx pixel into the HTML block. Also add a name for this tag at the top left.

   You can find your LeadsRx pixel by logging into LeadsRx, then select Account Setup under the name of your company at the top right of any page.



4. On this same page, you'll need to specify when the LeadsRx pixel will fire. Click on the Triggering block and select All Pages from the list of triggers. This is a standard trigger created by GTM for all accounts.



5. Click SAVE at the top of the next page. In GTM, you'll need to click the SUBMIT button at the top of the main dashboard page to publish your changes to your website. LeadsRx will then begin tracking immediately.

Tracking Form Completions

A common conversion tracked in LeadsRx is a form completion. You have the option of tracking just the event itself, or, you can also pass data from the form to LeadsRx such as the name, email address, company, etc. This is referred to as "profile data" and is completely optional.

If you want to pass profile data to LeadsRx, GTM can be used to pick up the data from form fields in most cases. To use this feature, you'll need to set up custom variables within GTM. Skip these steps if you do not want profile data.

Setting Up Custom Variables

1. Before you begin, identify the form you want to use on your website. Then, determine if the form fields have a convenient way to be identified. For example, some form fields have HTML representation that looks like this:

   <input type="text" name="email" id="email" value=""/>

   In this example, notice the use of the **id attribute** that specifies a unique value that can be used to identify this form field… in this case, the id attribute has a value of "email".

   In another example, consider this form field:

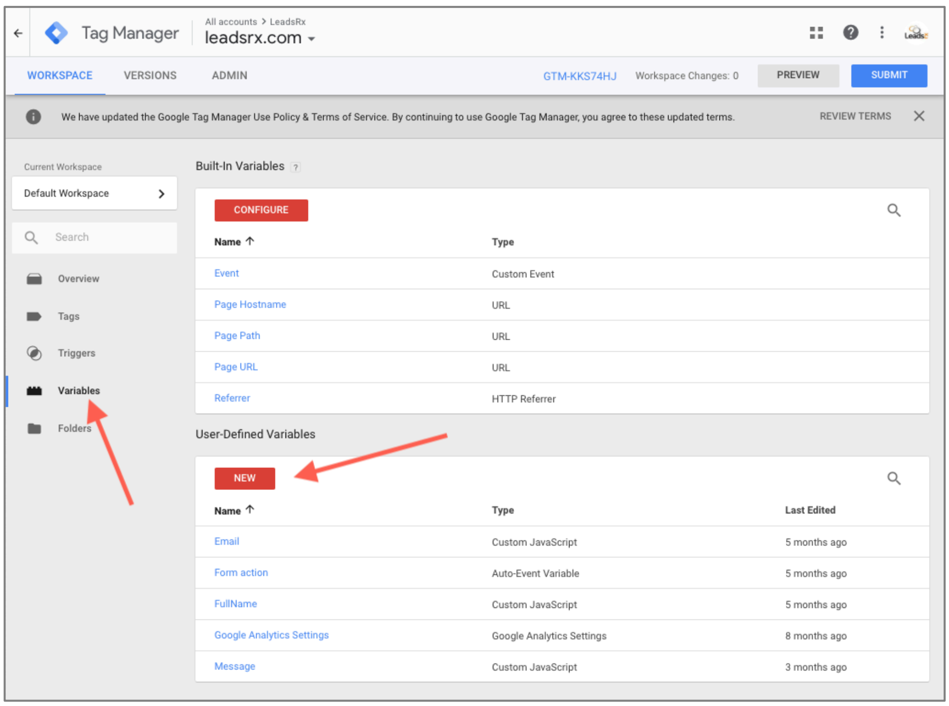
   <input type="text" name="email" value=""/>

   In this case, there is no **id attribute**. You can instead use the **name attribute**, however, there's no guarantee that this uniquely identifies this particular form field. There could be other elements on the same webpage also using the **name="email"** attribute and value. But if you are certain the form field is the only such usage, then it's safe to use.

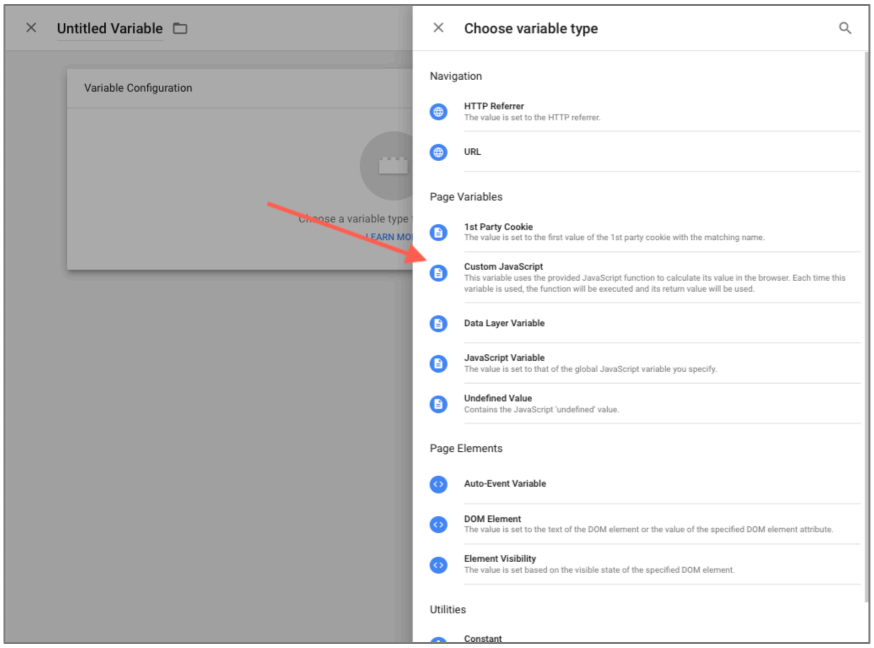
There are a few other ways to identify form fields on a webpage. Here's a link to more information:

https://www.w3schools.com/jsref/coll_form_elements.asp

2. Next, you'll need to create a custom variable in GTM that receives the value of your form field once the form is submitted. Within GTM, click on Variables in the left navigation area. Then, create a new custom variable by clicking on NEW in the User-Defined Variables area.



3. On the next page, click in the Variable Configuration block, then select Custom Javascript for the variable type.



4. Next, you need to insert a bit of JavaScript in the Custom JavaScript block. Here's an example:

   ```
   function() {
       return document.getElementById('email').value;
   }
   ```

   Notice that this code may be different depending on how you can identify the actual form field on your website. This example uses the unique value found in an **id attribute**. But if you're using the **name attribute,** the code above will be different. You may also use jQuery to simplify this step, if you have this tool installed on your website. Again, refer to this article for additional information:

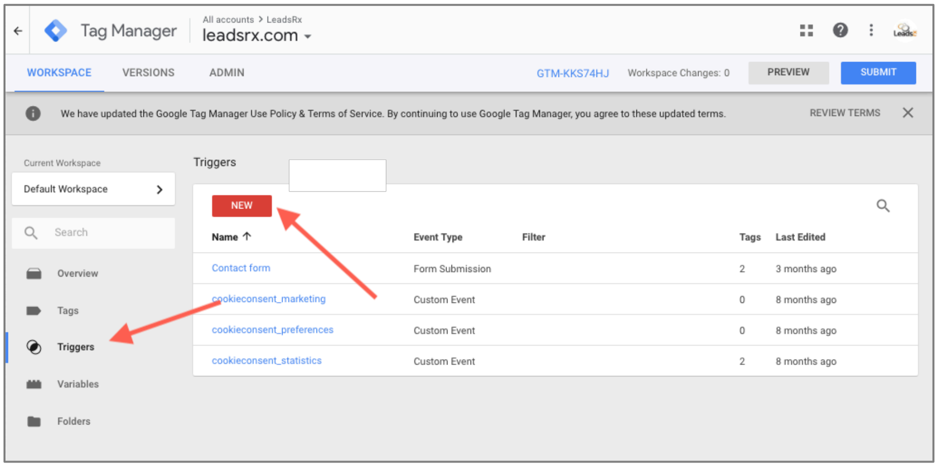
   https://www.w3schools.com/jsref/coll_form_elements.asp

   Whatever code you come up with, copy and paste that in the Custom JavaScript block in GTM. Then, create a name for your variable at the top left of the page, and click SAVE.

5. Repeat the steps above to create custom variables for each of the form fields you want to pass to LeadsRx.

Setting Up Form Conversions

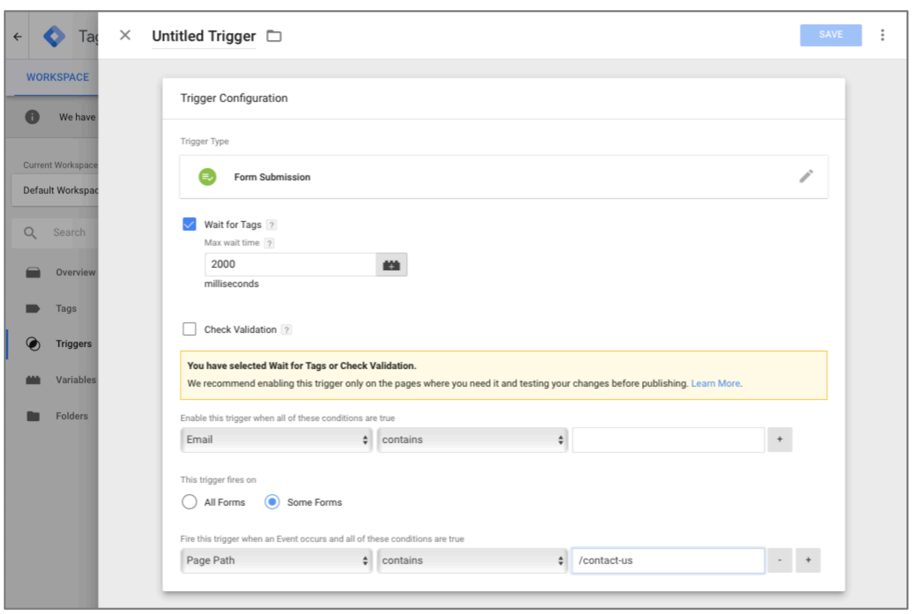
1. Within GTM, click on Triggers in the left navigation area, then click NEW to create a new trigger on the next page.



2. On the next page, click on the Trigger Configuration block, then select Form Submission from the list of trigger types.

3. On the list of options, tick the box for, "Wait for Tags" and leave the default of 2000 milliseconds. This will allow time for the LeadsRx pixel to fire before the form submission occurs.

4. Select the option, "Some Forms" for when this trigger should fire. Select "Page Path" from the first dropdown menu, "contains" from the second menu, and then enter the name of the page that contains your form in the third field. In the example below, we've used the page name "/contact-us", but your actual page name may be different.



5. Add a name for this trigger at the top left of the page, then click SAVE.

6. Next, we will want to GTM to notify LeadsRx when this form has been submitted. This requires creating a conversion tag. Start by clicking Tags in the left navigation area of GTM, then click NEW to create a new tag.

7. Click in the Tag Configuration block, then select Custom HTML as the tag type.

8. In the HTML block area, you will need to copy and paste the conversion script for the conversion you are tracking in LeadsRx.

   To find the correct conversion script, log into LeadsRx, then select Setup -> Set Up Conversions. Find the conversion you want to track, or, create a new one. Be sure and select the API option when creating the conversion. Then, click the link, View conversion scripts to see the various versions you can use. If you want to pass profile data to LeadsRx, select "JavaScript (with profile tracking)". Otherwise, select "JavaScript (NO profile tracking)".

9. If you ARE passing profile data to LeadsRx, you'll need to replace placeholders in the conversion script with GTM custom variables. For example, consider this is the conversion script you get from LeadsRx:

```
<script type="text/javascript">
var _lrx_profile = {
        "firstName":"PUT_FIRST_NAME_HERE",
        "lastName":"PUT_LAST_NAME_HERE",
        "email":"PUT_EMAIL_HERE"
};
_lrx_sendEvent('conversion',8987,'PUT_USER_ID_HERE',JSON.stringify(_lrx_profile));
</script>
```

   You **must** remove the placeholders such as "PUT_USER_ID_HERE" and replace this with one of the GTM custom variables created above. Enter the name of your GTM custom variable enclosed within **double curly braces** as in this example:

```
<script type="text/javascript">
var _lrx_profile = {
        "firstName":"{{firstName}}",
        "lastName":"{{lastName}}",
        "email":"{{email}}"
};
_lrx_sendEvent('conversion',8987,'PUT_USER_ID_HERE',JSON.stringify(_lrx_profile));
</script>
```

   Note that all quote marks must be **straight quotes** and not left and right quotes. This applies to both double and single quote marks.

   Note also the placeholder for userID, PUT_USER_ID_HERE. Refer to the LeadsRx documentation for more information about this field, but if you are not going to use it, you must replace it (and the surrounding single quote marks) with the word null as in this finished example:

```
<script type="text/javascript">
var _lrx_profile = {
        "firstName":"{{firstName}}",
        "lastName":"{{lastName}}",
        "email":"{{email}}"
};
_lrx_sendEvent('conversion',8987,null,JSON.stringify(_lrx_profile));
</script>
```

Note the use of the word "null" in **all lowercase letters without quote marks.** This is essential to get correct, or the conversion will not be registered.

10. Next, click on the Triggering block and select the Form Submission trigger created above. This means the conversion tag being created now will fire when that particular form is submitted by the user.

11. Enter a name for this tag at the top left of the page, then click SAVE.

12. You'll need to click the SUBMIT button at the top of the main dashboard page to publish your changes to your website. Now, the form submission will be registered as a conversion within LeadsRx.