

Introduction To Conversion Tracking

“Conversion Tracking” is an advanced feature for collecting transactional data from your Web site, correlated to existing or new customers in your Topica database. To collect such transactional data you must first define a “Trackpoint” – one or more pages on your Web site with embedded JavaScript code provided by Topica.

Price	Revenue
11.00	\$18479.1
00.00	\$4500.00

Using Trackpoints, you can collect almost any kind of data – products purchased, quantity, price, transaction total, etc. – and pass it back to your Topica database. Specifically, Topica Trackpoints let you:

- Create any number of conversion tracking fields
- Fields can collect text, date, numeric or category-based data
- Pass transactional and purchase data to your Topica database
- Use the data in product reports and revenue reports
- Use the data to segment audiences
- Use the data to trigger automated email campaigns
- Grow your list by subscribing customers during purchase

You can use the information gathered with Trackpoints both to improve your Web site and to create powerfully intelligent email marketing programs that respond to actions taken on your Web site. For example, if you choose to capture which products are purchased from your Web site, you could now create automatic cross-sell campaigns that would, for instance, offer a digital printer when a digital camera is purchased, or a discount coupon for a future store visit when order size exceeds one hundred dollars.

Trackpoints can also be used without any data fields, to simply register the fact that a page has been visited. In this capacity Trackpoints are a natural extension to click and open rates, as they could measure how many Web visitors came to a tracked page following an email campaign.

By using the total value of the order as one of the data fields, you can report on the revenue generated by a tracked Web page, even the revenue directly generated by a campaign sent to your customers.

Conversion Tracking is an add-on feature priced monthly relative to the size of your database. Please contact Customer Care to add this powerful new feature to your account.

Known and Anonymous Trackpoint Hits

Topica uses Web-based cookies to identify customers when they visit a Trackpoint. Customers will have the cookie set if they previously clicked on a link in any of your email campaigns. If the customer has been identified, he or she is considered to be “known”, and the data received via a Trackpoint is associated with that customer.

Other times, however, visitors to your Web site will not have Topica cookie set (either because they didn’t click the link, or because they are not currently in your Topica database). Such customers will be considered “anonymous” and any Trackpoint hits they produce will record only the total number of visits and the total revenue.

If you choose to collect the field “Email Address” as part of this Trackpoint, Topica will use the customer’s email address to match against your customer list. If a match is found, then the customer is properly identified. Such hits would be considered as “known” and record a full set of data.

Finally, if you create a Trackpoint with an option for “Auto-subscribe” and collect the “Email Address” field, Topica will automatically subscribe email addresses not already in your Topica database. If your list is configured to send confirmations, then the customer will immediately be sent a confirmation message asking them to confirm. If you create any autoresponders (e.g. a welcome message) those will be sent as well.

Getting Started with Trackpoints

To use Trackpoints, you must first decide what type of data you want to transfer to Topica. If you do not want to track any data other than just a page visit, you can skip to the Defining Trackpoints section below.

For the sake of this example, we’ll assume that you are tracking an order confirmation page on your Web site after a customer completes a purchase, which consists of the following data:

- Product Names (with price and quantity, possibly many products)
- Transaction Total (the dollar amount of the order)
- Total Tax (dollar amount of tax)
- Email Address of the buyer

Creating Database Fields for Trackpoints

In order to send the above data to Topica, you must start by creating those fields in the Database: DB Field Manager menu. If you purchased the Conversion Tracking feature, the field properties page will now show a choice between creating a regular “Demographic” field, or a special “Trackpoint” field. Trackpoint fields are used exclusively to collect transactional data.

To create a field for “Product Name”, click on “New DB Field”, set its name to “Product Name”, the type to “Trackpoint”, data type to “Category”, then check all three check boxes to allow the product name to be collected multiple times per single Trackpoint hit, and to have an associated price and quantity. Note that you do not have to manually add all of the possible names of your products, as any new name received via the Trackpoint will be automatically added to the list of values for this field (up to 500 values).

To create a “Transaction Total” field, repeat the steps above, but choose “Numeric” data type and do not check any of the boxes. “Email Address” is the only system field that you can collect through Trackpoints that already exists in your database – you do not need to create it. Repeat the steps for each additional field you would like to collect.

Defining Trackpoints

Create a new Trackpoint by clicking on the “New Trackpoint” link in the sidebar menu, after selecting the “Current Trackpoints” page from the “Data Capture” menu. Choose a name for your Trackpoint and select the “Secure” check box if the Web page you want to track is hosted securely (via https). Click “Save and Continue”.

On the next page you will be able to assign any Trackpoint fields that you created in the DB Field Manager, as well as the system field “Email Address” to your new Trackpoint. Use the “Add” and “Remove” controls to move available fields to the box on the right, to associate or disassociate them with this Trackpoint.

If you choose at least one numeric field to be gathered through your Trackpoint, then you can also designate it as a field that will be collecting the “Transaction Total” dollar amount. By specifying which field (if any) will be used as a

total, you will be able to see direct revenue numbers in both the campaign detail reports and the Trackpoint reports. If no numeric fields are used, the dropdown box will remain empty.

Finally, if you selected "Email Address" as one of the fields collected via your Trackpoint, you can optionally auto-subscribe new customers to your Topica database. Use the "Auto-Subscribe" check box to control this behavior.

Press "Save and Continue" to move on to the next page, where you will see a text area with a Javascript code snippet. This code snippet must be given to your Web developers for embedding into your Web site. Select the contents of the text area, copy it to clipboard, so that you can either email it or paste it directly into the source of the Web page that you want to track.

Embedding Javascript: For Web Developers

Your Web developers will need to integrate the Javascript code snippet onto the page you wish to track. If you define any data fields to be collected, the code snippet must be modified to have the proper values populated with the data that is available on your Web page.

The following code snippet collects "Email Address" and "Transaction Total" fields; however the values (between single quotes) are not yet populated.

```
// Field "Email Address", of type text
//      field ID  value
t.addData("f:31",  '');

// Field "Transaction Total", of type numeric
//      field ID  value
t.addData("f:5061",  '');
```

If your Web site uses, for example, Java Server Pages (JSP) technology, and the value of the transaction total field is available from the method `order.getTotal()`, while email address is available from `user.getEmailAddress()`, then the properly modified Javascript code would look like this:

```
// Field "Email Address", of type text
//      field ID  value
t.addData("f:31",  '<%= user.getEmailAddress() %>' );

// Field "Transaction Total", of type numeric
//      field ID  value
t.addData("f:5061",  '<%= order.getTotal() %>' );
```

For a field such as “Product Name”, which may appear multiple times, the JSP code would need to print a similar line of Javascript code for every product purchased. Optional arguments to the addData() method are price and quantity, and should be provided if appropriate. For example:

```
... topica javascript code ...

<% // sample java code to loop over all products in the order
    for (int i = 0; i < order.getItems().length; i++) {
        Item item          = order.getItems()[i];
        Product product    = item.getProduct();
    %>
// javascript code snippet to pass data to topica
t.addData("f:5062",
    '<%= product.getName() %>',
    '<%= product.getPrice() %>',
    '<%= item.getQuantity() %>',
);
<%
    }
%>
... topica javascript code ...
```

If you are not collecting any data fields, you do not need to modify the Javascript code snippet, you can embed it as is.

Trackpoint Reports

On the Trackpoint Reports page you can see a summary of data (i.e. hits, new addresses, revenue) across all of your Trackpoints for the last two days. Changing the date range will pull the data from a different time period.

Click on a linked Trackpoint name to see the details about the Trackpoint, which would show all data fields collected, with any associated revenue. The “New Addresses” column shows the number of new subscribers added to your list within a specified time period. Please make sure to read about and understand “known” and “anonymous” Trackpoint hits, both of which are shown on this report.

Using Trackpoint Data in Segmentation

In addition to reports, you can use Trackpoint data in building sophisticated and fine-grained audiences based on your customers’ buying patterns. These audiences can be used by autoresponders that may be triggered by a “Trackpoint Hit” event. You may want to setup several autoresponder campaigns for your “Order Confirmation” Web page, but assign each autoresponder to a different audience, so that they are sent depending on the data in the actual purchase.

To use Trackpoint data in audiences, start a new audience, and in the “Audience Filter Definition” dropdown choose either “Trackpoint Was Hit”, “Trackpoint Was Not Hit”, or one of the Trackpoint fields, which are grouped together right after the regular demographic fields.

Segmenting by Trackpoint Hit / Not Hit

The filters “Trackpoint Was Hit / Not Hit” are relatively simple. They allow you to include or exclude from the audience all customers in your database who at some point visited (or did NOT visit) the Trackpoint. Select “Trackpoint Was Hit” and click the “Add” button to add this filter to your audience. From the dropdown, select the desired Trackpoint.

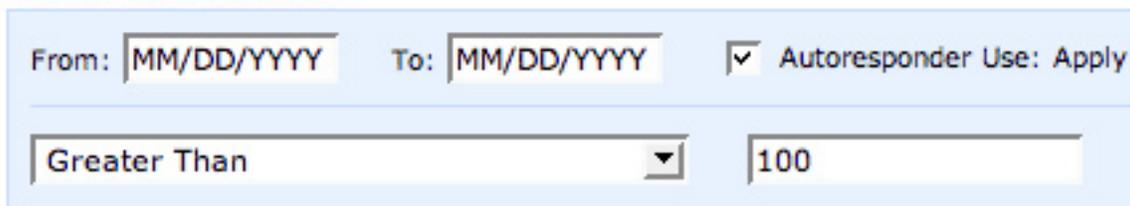
Note that when you choose any transactional filters you will see an “Advanced Options” link on the right hand side of the filter group. Click on it and you will see that several additional options appear in the group. They allow you to specify a date range that would apply to this transactional event. For example, to include people who visited your tracked page before August 1st 2004, fill the “To:” date with “07/31/2004” and leave the “From:” blank. Date boundaries are always included in the query, so specifying “08/01/2004” would actually cover all visits up to and including August 1st 2004.

Segmenting by Trackpoint Data Fields

To use a Trackpoint field in segmentation, choose it from the filter selection dropdown and click ‘Add’. You can use all standard operators as you would with any regular demographic field of type Date, Text, Numeric or Category. For example, you could create a filter where only subscribers who purchased the product “Adidas Snowboarding Boots” are included.

Trackpoint fields have additional controls that allow you to fine tune the date range for the condition, as well as decide how the filter is used in an autoresponder to a tracked page. To do so, click on the “Advanced Options” . In the example below, we are using the “Transaction Total” field, with the condition that it must be over \$100.

and Transaction Total



From: To: Autoresponder Use: Apply

Lets assume that you want to send a 5% discount coupon to every customer that buys over \$100 worth of products in a single purchase. If the customer buys twice within a given month – the first time \$120 worth of goods, and the second time only \$50 – you would want to send the coupon only the first time.

This is exactly the type of scenario that the “Autoresponder Use” checkbox will allow you to control. The checkbox only makes sense in audiences used by an autoresponder, when it is triggered by a Trackpoint hit:

- If checked, the condition specified will apply to the actual data sent with the Trackpoint at the time of the order. In the example above, only the first Trackpoint hit with the total of \$120 would match this condition, and would trigger an autoresponder with the coupon.
- If not checked, the condition would be applied to historical data for this field and could be met by any previous transaction. In our example, that would include any past transaction over \$100.

An autoresponder triggered by a Trackpoint hit that uses this audience would send the coupon both times. The first time is clear – the total of \$120 meets the specified condition so the coupon is sent. The second time the customer spends less than \$100, yet the historical data shows they have spent more than \$100 in the past, so the condition is met again and the coupon is sent a second time.