TRACKING LEAD BEHAVIOR IN
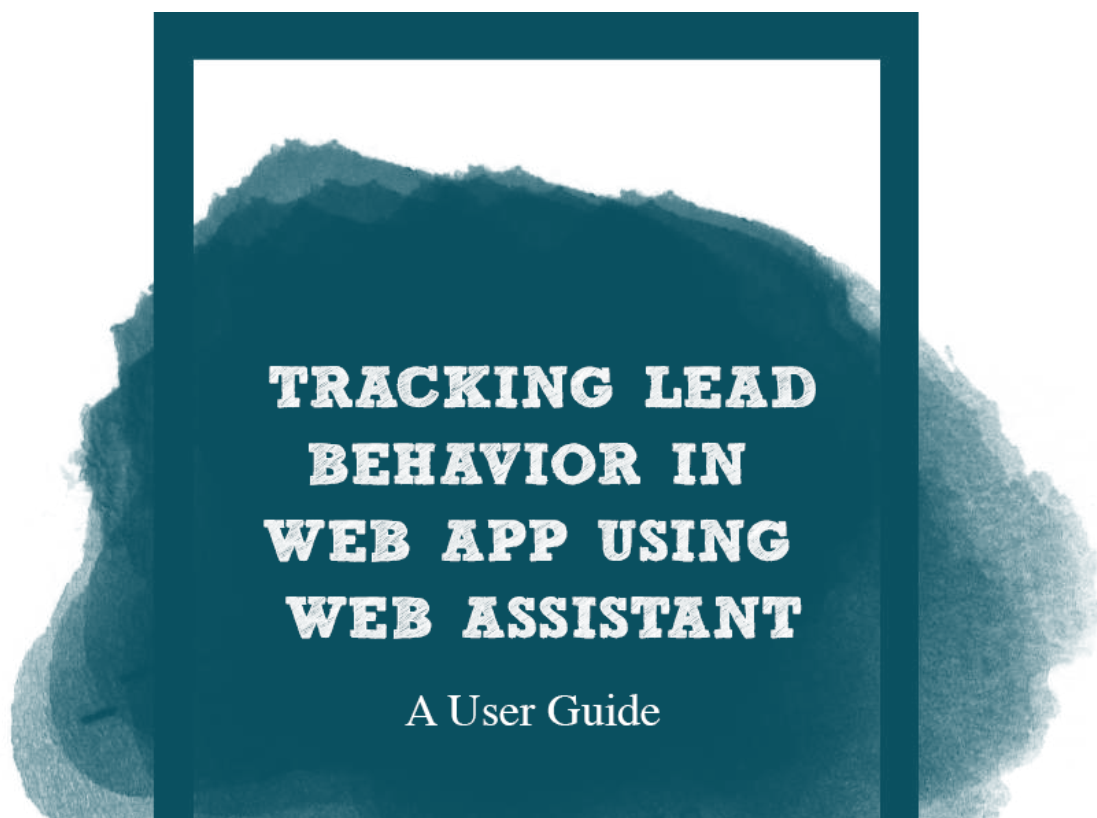# WEB APP - USING WEB ASSISTANT

TRACKING LEAD BEHAVIOR IN WEB APP USING WEB ASSISTANT

A User Guide

Building up a web application is complicated, and much of the initial setup is based on assumptions about what your users want. When users start using your application, it's important to pay attention to their behavior. You can learn whether they use it the way you intended, and analyze to what extent they use various features and functionalities. With all this real-time user data at hand, you'll discover the strengths and weaknesses of your application so you can enhance its design and functionalities based on user requirements.

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Connecting web application with web assistant

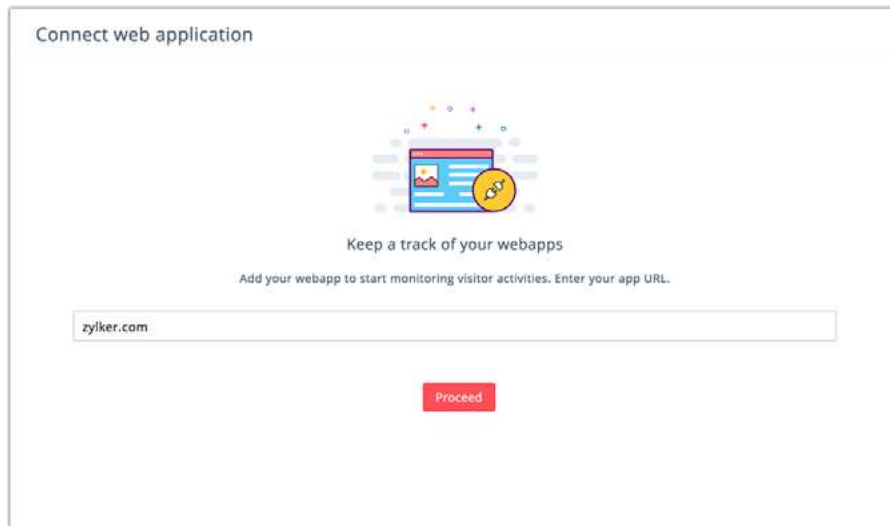## Web assistant for web applications

Connect your web application with web assistant to know where your users navigated from to a particular page, and which activities are performed the most and least. With these insights, you can enhance the user experience and engage with your users based on the activities they've performed.

With web assistant, you can:

- *See how your users use your application*
- *Analyze your users' behavior and educate them on your features and functionality*
- *Find out areas of inconvenience in your application*
- *Enhance user experience*

Connecting your web app

1. From the *Navigation* toolbar, select **Web assistant** and select **Web apps**.

2. Click **Connect my web app** in the top-right corner of the page.

3. Enter your application URL.

4. Click **Proceed**.

Enabling application tracking

There are two ways to enable tracking:

- Adding a JavaScript code snippet to your application.

  As you add your application with Web Assistant, a tracking code will be generated. Copy this code into the homepage of your application.

  This tracking code will let us track URLs of your application that only differ in their hash segment.

  For example:

  https://application.zylker.com/home.do#dashboard
  is the homepage of an application.
  Here #dashboard is the hash segment of this URL.
  Let's say
  https://application.zylker.com/home.do#creation
  https://application.zylker.com/home.do#reports
  https://application.zylker.com/home.do#settings are the different URLs of the application that differ only in their hash segment part.

Now embedding tracking code in https://application.zylker.com/home. do#dashboard is enough to allow tracking for the other pages.

- Sending information through API

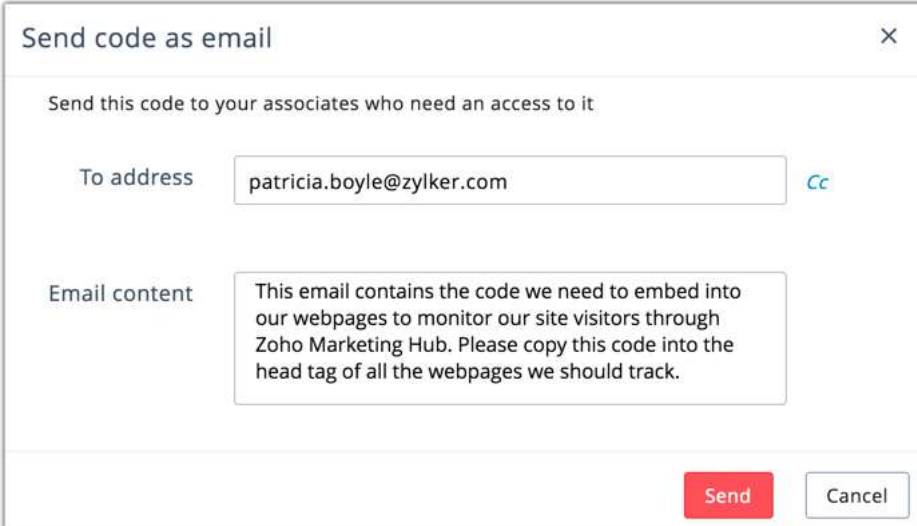 Use the following API to send us information about user activities in your application.

Method Name	Method Type	Purpose	Example
emailid	String	Your lead's email address. (If any given email address is not added to your Zoho Campaigns account, their activities will not be tracked.)	"emailid":" api@zohocampaigns.com "
activitytype	Integer	The value should be 0 for page visits and 1 for page actions.	"activitytype":"0" "activitytype":"1"
domainid	String	Unique IF of the configured domain.	"domainid":"******"
URL	String	Url of the page you want to track on the value of the action you want to monitor.	For pages: "url":" http://zcampaigns.zohosites.com/ " For actions: url":" http://zcampaigns.zohosites.com/ ", "action":"Clicked", "actionvalue":"ZCampaigns"
IP	String	The request IP.	"ip":"172.23.110.188"
Useragent	String	The list of user agents.	"useragent":"Mozilla/5.0 (Macintosh; Intel Mac OS X 10.11; rv:31.0) Gecko/20100101 Firefox/31.0"
zsoid	String	Your Zoho MarketingHub org ID.	zsoid=****

Send code as an email

You can also have the code emailed to any relevant recipients:

1. Click **Send code as email** in the top-right corner of the page.

2. Enter the email address and content.

3. Click **Send**.

All of your application URLs will be listed under the App pages subtab as and when they are accessed.
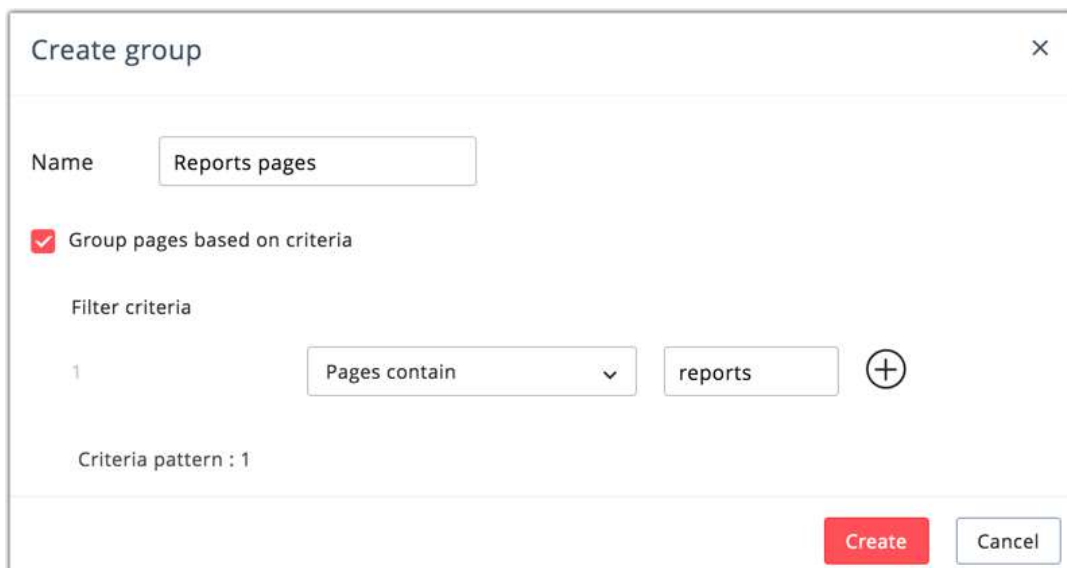

Grouping app pages

You can group up similar pages. Put pages under a group manually or set up a criteria so the pages that match the criteria will be put under the group.

To create a group:

1. From the *Navigation* toolbar, select **Web assistant** and select **Web apps**.

2. Select your application.

3. Click the **App pages** subtab.

4. Click the **Groups** option in the top-left corner.

5. Click **Create new group**.

6. Enter a name for your group.

7. Check the **Group based on criteria** option if you want to add a criteria to the group. Set the desired criteria.

8. Click **Create**.

To put an app page under a group manually:

1. From the *Navigation* toolbar, select **Web assistant** and select **Web apps**.

2. Select your application.

3. Click the **App pages** subtab.

4. Select the pages you want to group.

5. Click **Associate to group** on the top left corner.

6. Select the desired group or create a new one.

Note: You cannot add a page to a group that has criteria.

App page visit reports

To view the report:

1. From the *Navigation* toolbar, select **Web assistant** and select **Web apps**.

2. Select your application.

3. Select the **App pages** subtab and select the page for which you want to view the reports.

From the *Reports* page, you can view overall reports and lead-based reports.

- Overall reports

  Under the overall reports you will be able to get insights on the following:

  o **Total visits to the page** - This graph will show you the total number of users who visited the page.

  o **Location-based stats** - This geo map will show you the regions from where your page is receiving visits from.

  o **User agents** - View the devices, OS, and browsers your users used to visit the page.

- Lead-based reports

  Under lead-based report, view the list of users who have visited your app page over a period of time (e.g., today, past 24 hours, past week, past month). You can click on a user to see a detailed report on their actions and the time those actions were performed. From here, you can also mass update fields or export leads.

Setting up app actions tracking

App actions are any user interaction with your application. You need to set up the actions you want to track if you've used the JS code snippet to enable your application tracking.

Set up tracking for app actions by adding a JavaScript event call to a particular element in your application. For example, if you want to track the number of clicks on your Create button, you need to add a JS event like this:

```
<button onclick="zcAction('clicked', 'View_report')"></button>
```

- "Onclick" is the JS event

- "zcAction" will be called to track the action

- "Clicked" is the action

- The value is the button name

When the JavaScript event is added to your Create button, all clicks made on that button will be calculated and displayed under the Events sub-tab.

This example is specifically for a click action. You can track other elements by adding a JavaScript event call based on that specific element.

The actions you've defined will be listed under the **App actions** subtab.

Reports on app actions

Once you've defined the actions, you will be able to view their reports.

1. From the *Navigation* toolbar, select **Web assistant** and select **Web apps**.

2. Select your application.

3. Select the **App actions** subtab and choose the action you want to view reports for.

From the *reports* page, you can view Overall reports and Lead-based reports.

- Overall reports

  Under the overall reports you will be able to get insights on the following:

  o **Number of times the action was performed** - This graph will show you the total number of users who performed the action.

  o **Location-based stats** - This geo map will show you the regions from where the action was performed.

  o **User agents** - Under this section you will be able to view the devices, OS, and browsers your users used.

- Lead-based reports

  Under lead-based report you will be able to view the list of users who performed the action over the present day, the previous day, past 24 hours, past week, past month or past six months. Click on each user to view a detailed report along with the date and time they became your lead. From here, you can also **Mass update fields** or **Export leads**.

Understanding web assistant dashboard for web apps

Once you embed the tracking code in your pages and your pages start receiving visits, you can view the overall report of your application in the Web assistant dashboard. You can set the time period that you want to view the report for.

The following are the insights you will gain from the Web assistant dashboard:

These data will be specific to the selected time period

Summary

Here you will be able to view the following:

- **Total visits** - Total number of visits that were made.

- **New users** - Number of users accessing your application for the first time.

- **Returning users** - Number of users accessing your application who had already accessed it before.

Total visits	New users	Returning users
70	13 57% drop	57 12% drop

Goals

Here, you will be able to view the number of users who have achieved your set goals, and those who have missed your goals.
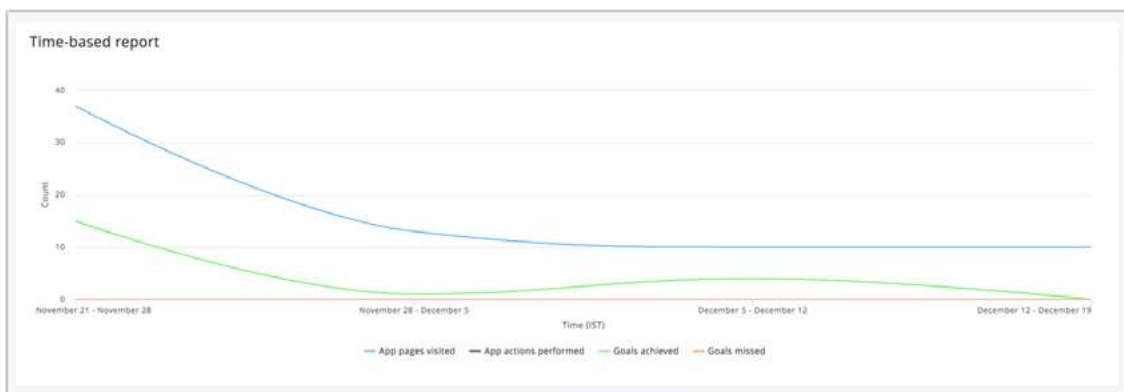
App actions

Here you will be able to view the number of users who have performed the app actions.
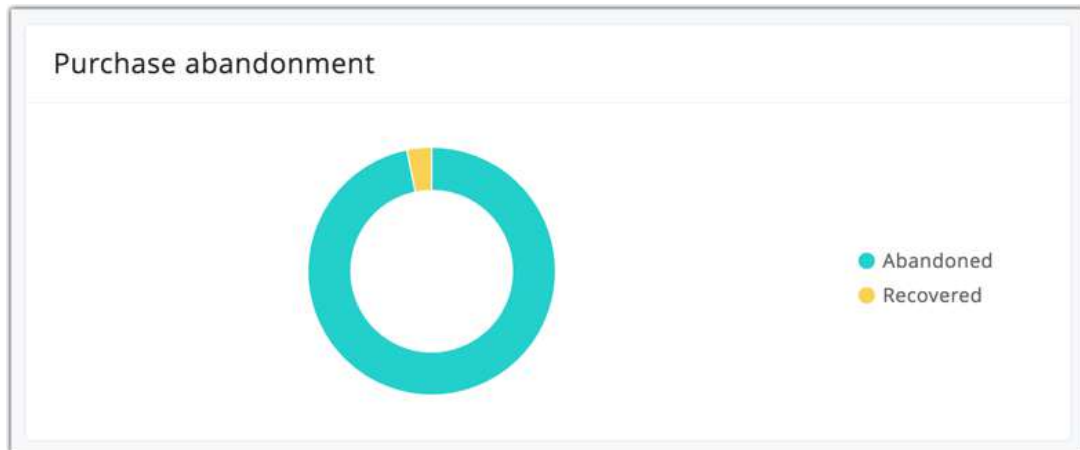

Time-based report

Here, you will be able to see the overall visits and clicks over time.
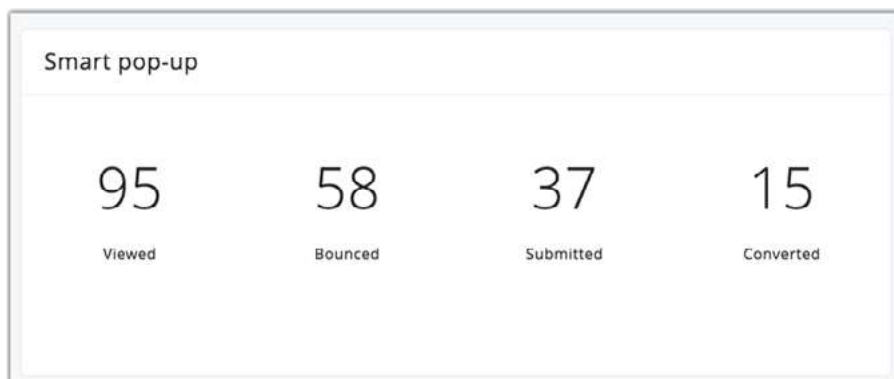
Purchase Abandonment

Under this section you will be able to view the total purchase abandonment and the number recovered.

Smart popups

Here, you will be able to view the number of users who viewed the smart popups, users who submitted the form, and users who closed the form without responding.
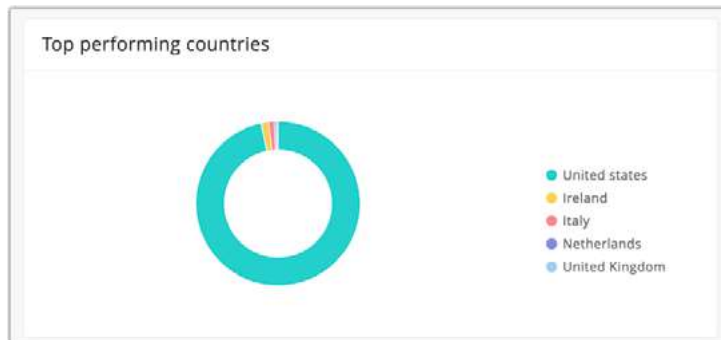
Top performing pages

Pages with the top five visits will be listed under this section.

Top performing countries

Under this section, you will be able to view the top five countries with respect to visits.

Top performing goals

Under this section, top five goals with respect to the number of achievers will be listed.

Top performing app actions

Under this section, the top five app actions with respect to the number of times they were performed will be listed.

Top performed actions	
Clicked - Create project	589
Viewed - reports	534
Exported - reports	198

User agents

Here, you will be able to view the devices and browsers your users used to access your application.

Location-based stats

This section will give you insights about the countries from where there have been visits and clicks in a geo map.

Creating web app goals

Now that you can track user activities on your application with web assistant, it's time to decide which activities you want your users to perform. These are your goals. Define the goal criteria based on user behavior and perform specific actions on goal achievers.

Creating a goal

1. From the *Navigation* toolbar, select the **Web assistant** tab and choose **Web apps**.

2. Select your application.

3. Select the **Goals** sub-tab.

4. Click **Create Goal** in the top-right corner of the page.

In the Create Goal page, enter the following information:

- **Goal name** - Give a name for future reference.

- **Type of visitor** - Choose new visitor or returning visitor or both

- **Goal criteria** - Set the criteria based on the following:

  - App actions performed - Select from your defined actions your users should perform on your application. Choose whether the action should be performed on a specific app page or on any page.

  - Page visit - Select the page you want users to view.

  - Visits to any app page with a specific keyword in its URL - Enter the keyword into the text box.

- **Goal duration** - You can set the time period during which the goal should be active. Start the goal either on its activation or on a particular date. End the goal on a particular date or choose to never end it.

- **Aditional filters based on lead information** - You can filter users further based on their field information.

- **Actions to be performed** - Select and define the actions you want to perform for users who match the goal's criteria.

- After filling up all the necessary information, click **Activate**. You can also choose to **Save as draft** and activate it in the future.

The following actions can be performed once a goal has been achieved:

- **Add users to a list**: Leads who have achieved the goal will be added to a mailing list that you've specified. If necessary, you can create a new mailing list.

- **Send email** to users who meet the criteria. Create a campaign and configure content. You can choose to send it immediately, or schedule it for later.

- **Update goal in Zoho CRM** : When users match the set criteria, a field you select in Zoho CRM will be updated with the name of your goal. Select a pick list field from Zoho CRM so that multiple goals can be updated.

- **Update the fields** of users who have achieved the goal. Select the field to update and provide a value for that field. You can do one of the following:

  - **Text fields** : Overwrite the existing text value or append text to the existing value.

  - **Integer fields** : Overwrite the existing integer value or add/ subtract an integer from the existing value.

  - **Date and time fields** : Overwrite the existing date and time or update the date and time when the action occurs.

- **Add/subtract score** for leads who have achieved the goal. Select a score to be added or subtracted.

- **Assign tags** to leads who have achieved the goal. You can assign any number of tags to your users. If necessary, you can create a new tag.

- **Remove tags** from users who have achieved the goal. Select the tags to be removed.
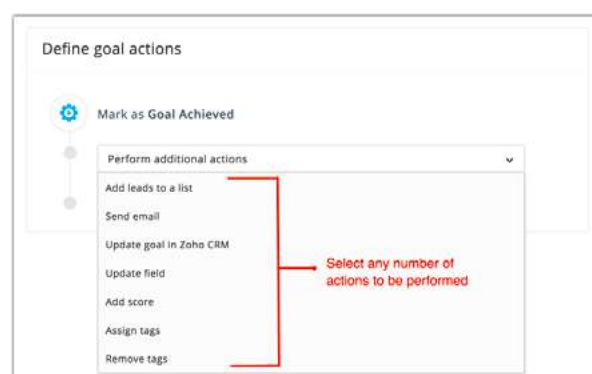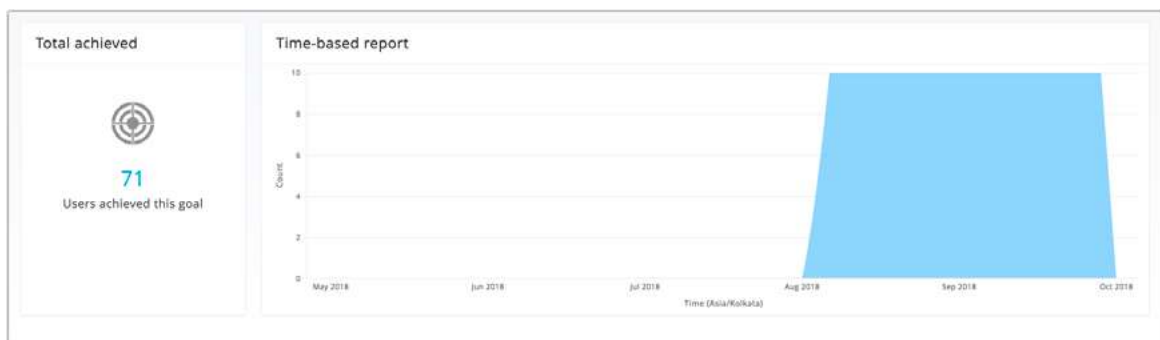
Achieved goal reports:

To view this report:

1. From the *Navigation* toolbar, select **Web assistant** and select **Web apps**.

2. Select your application.

3. Select the **Goal** subtab and choose which goal you want to view the reports for.

4. Select *Overall report* subtab to view the overall report of the selected goal.

5. Select *Leads-based* subtab, to view the list of leads who have achieved the goal.

You can also view reports of actions defined under goal. Click the **Goal action-based** subtab and select the action you want to view the reports for and see a list of leads for whom the action was performed and those that were skipped.

Creating missed goals for web app

Segment users who have missed out to perform certain steps in a series of steps and perform desired action for them.

Creating a missed goal

1. From the *Navigation* toolbar, select the **Web assistant** tab and choose **Web apps**.

2. Select your domain from the list view.

3. Select the **Missed goals** sub-tab.

4. Click **Create** in the top-right corner of the page.

In the Create page, enter the following information:

- **Name** - Give a name for future reference.

- **Criteria** - Define the activities the users must have performed and must have missed to perform to be marked under the missed goal. You can set up this criteria based on the following:

  - Action performed - Select from your defined app actions.

  - Webpage visit - Select the webpage you want your users to visit.

  - Visits to any webpage that contains a specific keyword - Enter the keyword into the text box.

- **Additional criteria** - If needed, you can apply additional filters based on field information.

- **Actions to be performed** - Select and define the actions you want to perform for users who match the missed goal's criteria.

After filling up all the necessary information, click **Activate**. You can also choose to **Save as draft** and activate it in the future.

Create missed goal

Define the activities users should have performed and those users should have missed

Name   Missed to create project

Define goal conditions

Activities performed   Visits a particular page   ▼   zylker.com/home#projects   ▼   ⊕

Activities missed   Does not perform a particular action   ▼   Clicked - Create project   ▼   ⊕

Filter users based on their field information (if available)

Here are the actions that can be performed once a goal has been achieved:

- **Add users to a list:** Users who have matched the criteria will be added to a mailing list that you've specified. If necessary, you can create a new mailing list.

- **Send email** to users who match the criteria. Create a campaign and configure content. You can choose to send it immediately, or schedule it for later.

- **Update goal in Zoho CRM**: When users match the set criteria, a field you select in Zoho CRM will be updated with the name of your missed goal. You should select a pick list field from Zoho CRM so that multiple goals can be updated.

- **Update the fields** of users who have matched the criteria. Select the field to update and provide a value for that field. You can do one of the following:

  - **Text fields:** Overwrite the existing text value or append text to the existing value.

  - **Integer fields:** Overwrite the existing integer value or add/ subtract an integer from the existing value.

  - **Date and time fields:** Overwrite the existing date and time or update the date and time when the action occurs.

- **Add/subtract score** for users who have missed the goal. Select a score to be added or subtracted.

- **Assign tags** to users who have missed the goal. You can assign any number of tags to your users. If necessary, you can create a new tag.

- **Remove tags** from users who have missed the goal. Select the tags to be removed.
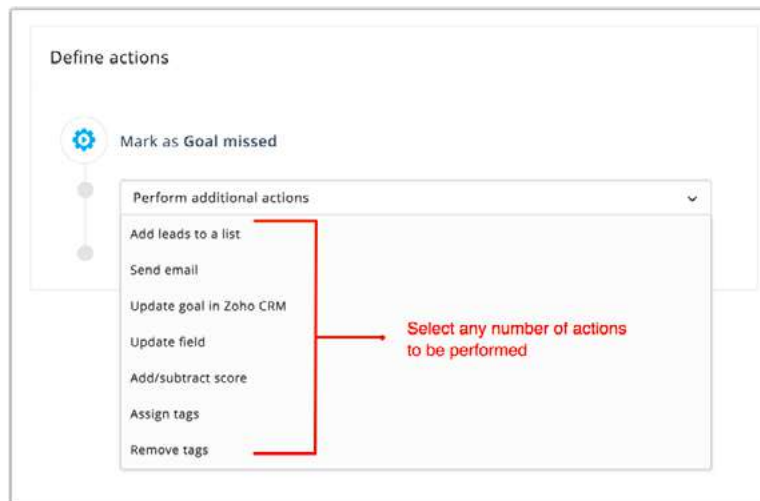

Reports

To view reports for missed goals:

1. From the *Navigation* toolbar, choose **Web assistant** and select **Web apps**.

2. Select your domain from the list view.

3. Select the **Missed goal** subtab and choose which goal you want to view the reports for.

4. Select *Overall report* subtab to view the overall report of the selected goal.

5. Select *Leads-based* subtab, to view the list of leads who have missed the goal.

You can also view reports of actions defined under goal. Click the *Goal action-based* subtab and select the action you want to view the reports for and see a list of leads for whom the action was performed and those that were skipped.
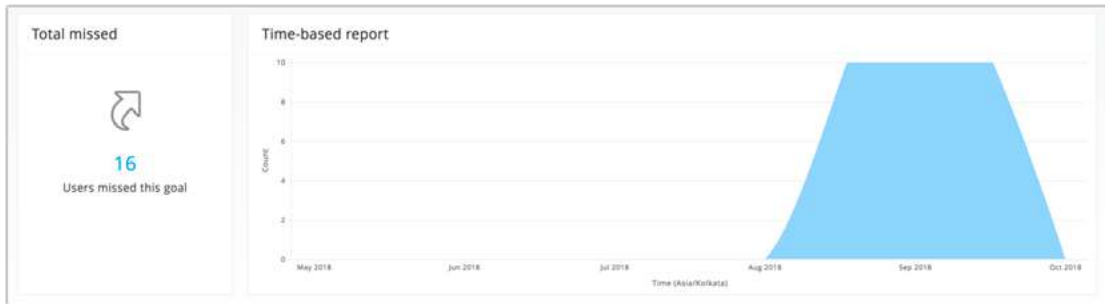
Overall setup for web app

Under setup you can do the following:

Tracking code

Under this section of the setup, you will find the tracking code you need to embed in your the homepage of your application.

Alias domains

You can make a domain alias to a main domain. When a domain is made alias to another, tracking of the alias domain will be done under the main domain. In other words, the tracking reports of the alias domain will be merged with the main domain's tracking reports.

To add alias domains:

1. From the *Navigation* toolbar, choose **Web assistant** and select **Web apps**.

2. Select your domain.

3. Select the **Setup** subtab.

4. Navigate to the **Alias domains** section and click **Add**.

5. Enter the alias domain.

You can add a maximum of three alias domains.

Note: For the alias domains, you will have to embed the tracking code generated for the main domain.
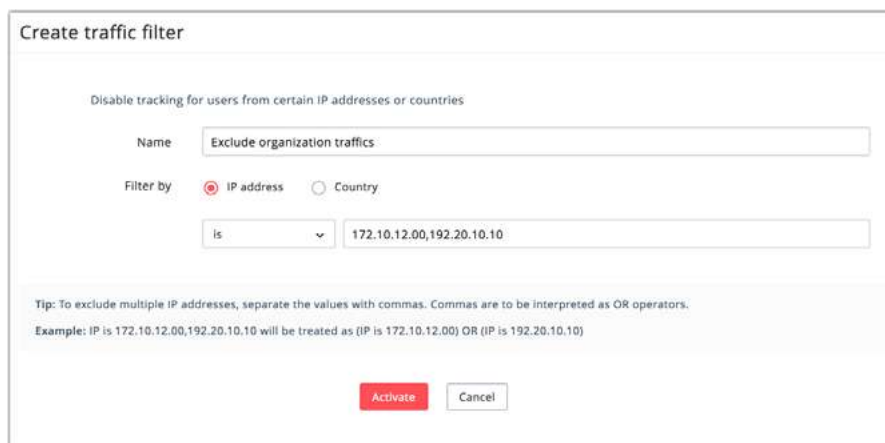
Add alias domain

Alias domain	www.zylker.eu

Save   Cancel

Filters

You can disable site tracking for users from certain IP addresses or countries by setting up filters. These filters can be used to exclude the traffic from your own organization.

To create filters:

1. From the *Navigation* toolbar, choose **Web assistant** and select **Web apps**.

2. Select your domain.

3. Select the **Setup** subtab.

4. Navigate to the **Filters** section and click **Create filter**.

5. Give your filter a name.

6. Choose from the following options:

   o **Create filter based on IP addresses** - Enter the IP address or the range of addresses you want to exclude.

   o **Create filter based on country** - Select the country you want to exclude.
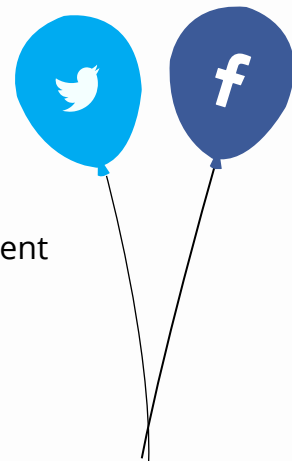
7. Click **Activate**.

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