A getting started guide to

Tracking form submissions with CallRail

Trace form submissions back to your marketing efforts

A single line of code will help your business measure which channels, campaigns, ads, and keywords are generating form submissions (and phone calls).

Add code once, collect data forever

Before tracking forms, you'll need to install the JavaScript snippet on every page of your website. Our code snippet is the key to understanding your customer's journey to contacting you—codes can be added via Google Tag Manager, our Wordpress and Wix plugins, or manually. Add it to each page on your website, and the code captures and relays information about each of your visitors back to you.

You can also integrate with popular form builders such as Gravity Forms, Wordpress, Unbounce, Hubspot, and others to access all the interactions driving high-value form submissions.

We pair well with your marketing tools

Capture all the lead information you need, and sync your analytics into your tech stack without any hassle. Get a more complete view of your marketing, right where you want it. In this guide, we'll talk about integrating with Google Analytics, Google Ads, Microsoft Ads, and HubSpot, but we integrate with most software tools.

Clear, objective reporting

By activating form tracking for your account, you'll have a full view of every touchpoint in the buyer's journey, along with reporting that gives proper attribution to every single channel or campaign.

Let's dive in and help you benefit from Form Tracking with CallRail

- ✓ Manage all your inbound leads (forms, texts, and phone calls) in one dashboard.
- ✓ Reach your clients while they're still thinking about your business and ready to talk.
- ✓ See the marketing source and PPC keyword of all form submissions.
- ✓ Reduce your response time and increase your conversion rate.
- ✓ Get alerts by phone, text, or email so you can contact your prospects immediately.

In this quick getting started guide for Form Tracking, you'll learn:

How to create or integrate with existing forms to start tracking form submissions

Best practices for analyzing the data you collect

What favorite platforms to pair with

How to download and report on each submission

SECTION ONE

Setting up forms with CallRail

CallRail's Form Tracking feature allows you to easily stay organized and on top of every form submitted to your website. Each time a customer fills out a form, we'll capture the contents of that form and instantly alert you by phone call, text message, or email. **This allows you to increase your lead conversion rate.**

External Forms

Integrate your existing online forms builders such as Gravity Forms, Wordpress, Unbounce, HubSpot, and others to access all the interactions driving high-value form submissions.

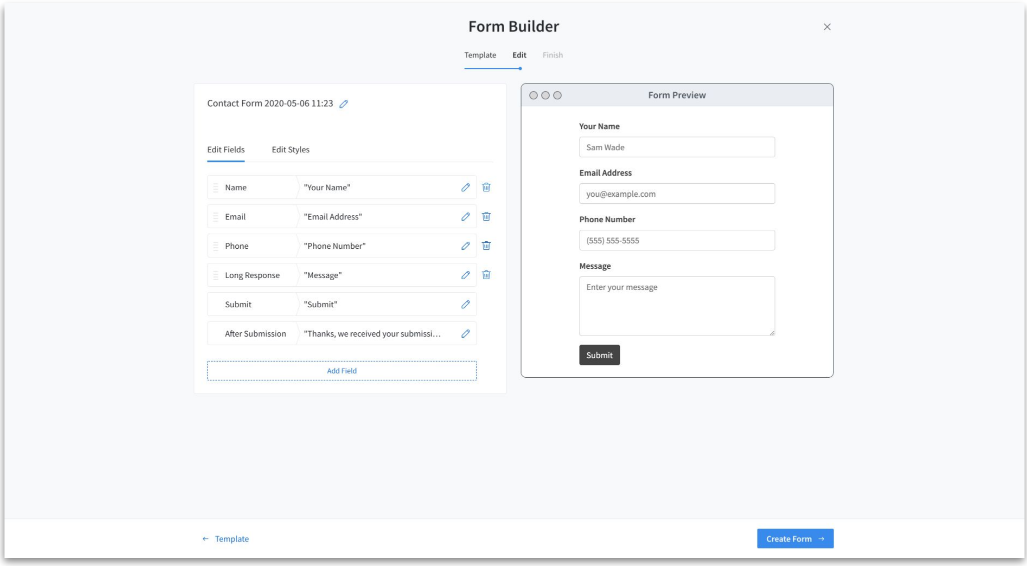
Each company in your account has its own setup for external form tracking. Use these instructions for each company where you'd like to track a form you've created outside of CallRail. Additionally, you can check out more information for troubleshooting external forms.

Custom Forms

If you don't have a form on your website or you'd like to build a new one, you can use CallRail's Custom Form Builder—this will also give you more flexibility for reporting on your forms in CallRail.

With Form Tracking, you can capture and follow up with customers as soon as they submit a form to your website. Custom forms allow you and your team to build and design forms to gather important information from your customers, and is made simple with a tabbed interface and drag-and-drop builder.

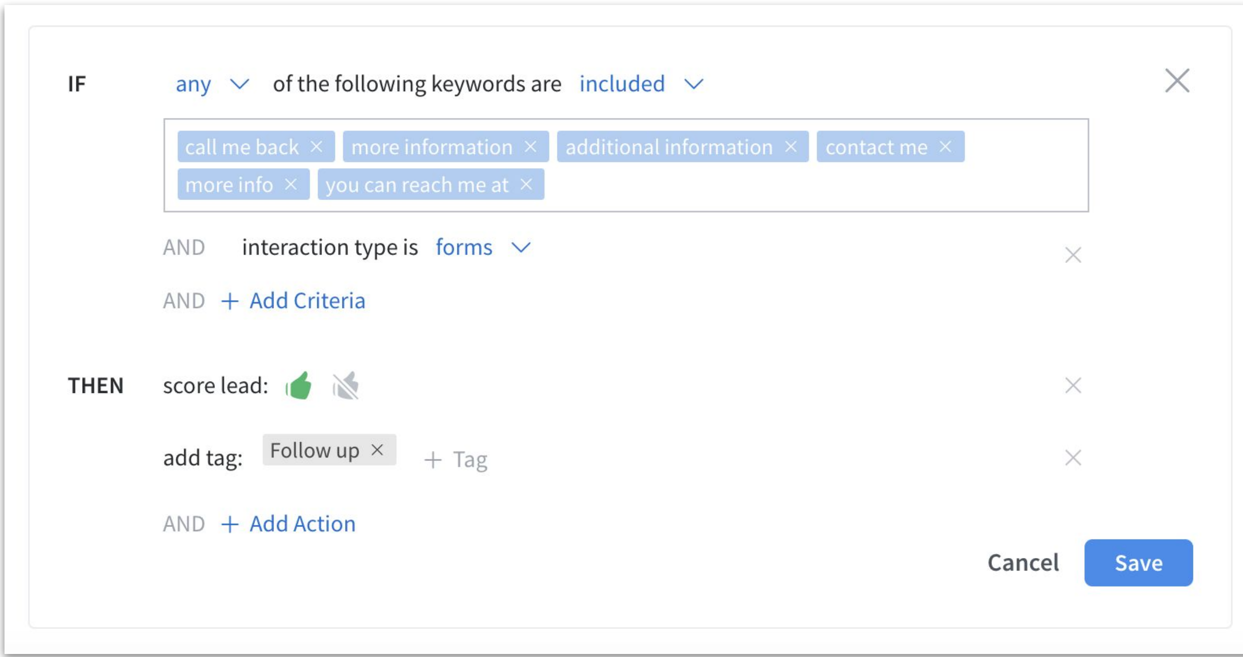
CallRail's Custom Forms feature is company-dependent within your account. Use this set of instructions for each company where you'd like to build a form.



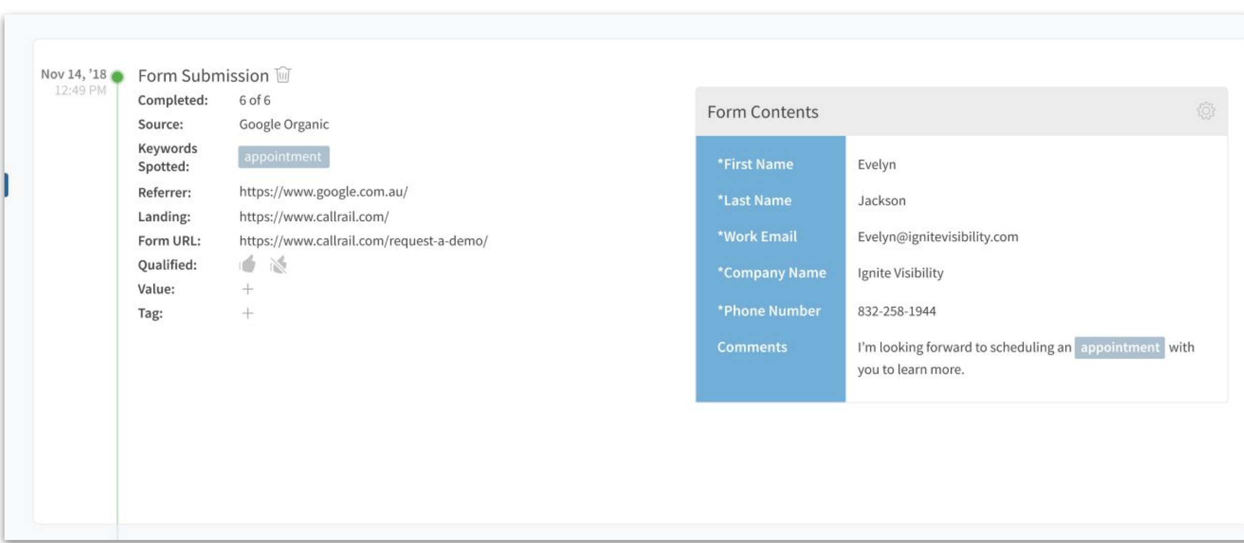
Keyword Spotting

Keyword Spotting automatically identifies specific words submitted in a form for easier organization and reporting on your leads. Choose which words to target from your form submissions and tag, score, and apply values to those leads based on your own customized workflows.

Keyword Spotting is company-dependent in your account. Use these instructions for each company where you'd like to activate Keyword Spotting.



Your spotted keywords will appear in your form submissions detailed in your customer timelines. In this example, the keyword spotted is "appointment."

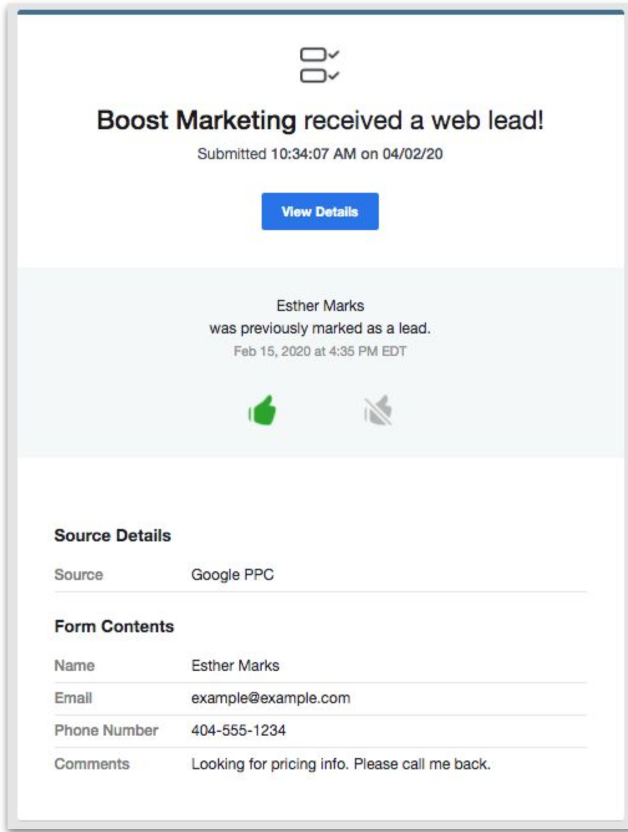


Setting Up Alerts

With CallRail's Form Tracking tool, you can receive a notification when a potential lead has submitted a form on your website. These email notifications include each field your customer completed on your form, as well as the marketing campaign information for that customer. These notifications also include a link to that customer's timeline in your CallRail account so you can get a detailed history of each interaction they've had with your business.

You can create or update notifications for your personal login at any time. If you need to manage another user's notifications, you'll need to be an administrator or a manager. For more details about the different user types in CallRail, see this help article: [Managing Users].

Use these [instructions] if you'd like to receive a notification email for yourself or another user on your account when someone fills out a form on your website.



Quick Response Notifications Forms

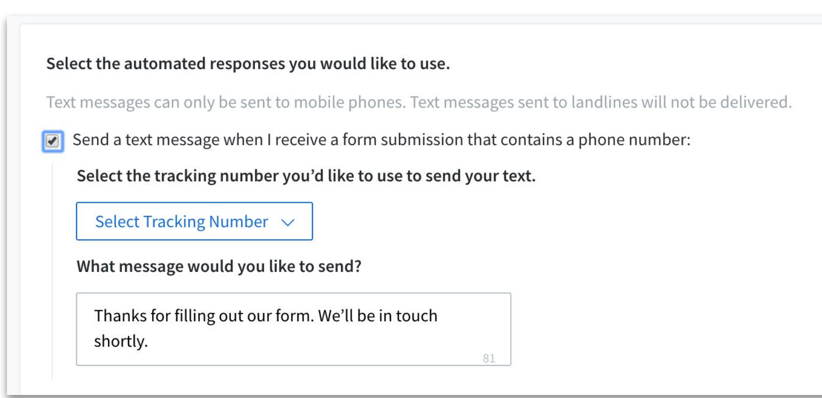
By setting up Quick Response Notifications you can get notified via email, phone call, or text to ensure you're calling them back as soon as you can to win the business. These notifications will include the contents of the form, as well as the telephone number where you can reach the customer who submitted a form on your website.

Automated Responses

Response time is an important factor in capturing new leads and creating conversions from your advertising. We built our Automated Responses feature to make sure that leads who contact your business via an online form always receive a response—use this feature to set up an automated text message that sends to customers who filled out a form on your website.

This feature is commonly used to let a customer know when they can expect to hear from you if you weren't available to speak with them when they reached out to your business.

If you'd like to utilize this feature, use these [instructions] to set up Automated Responses for your account.



SECTION TWO

Viewing the data

Form Submissions Log

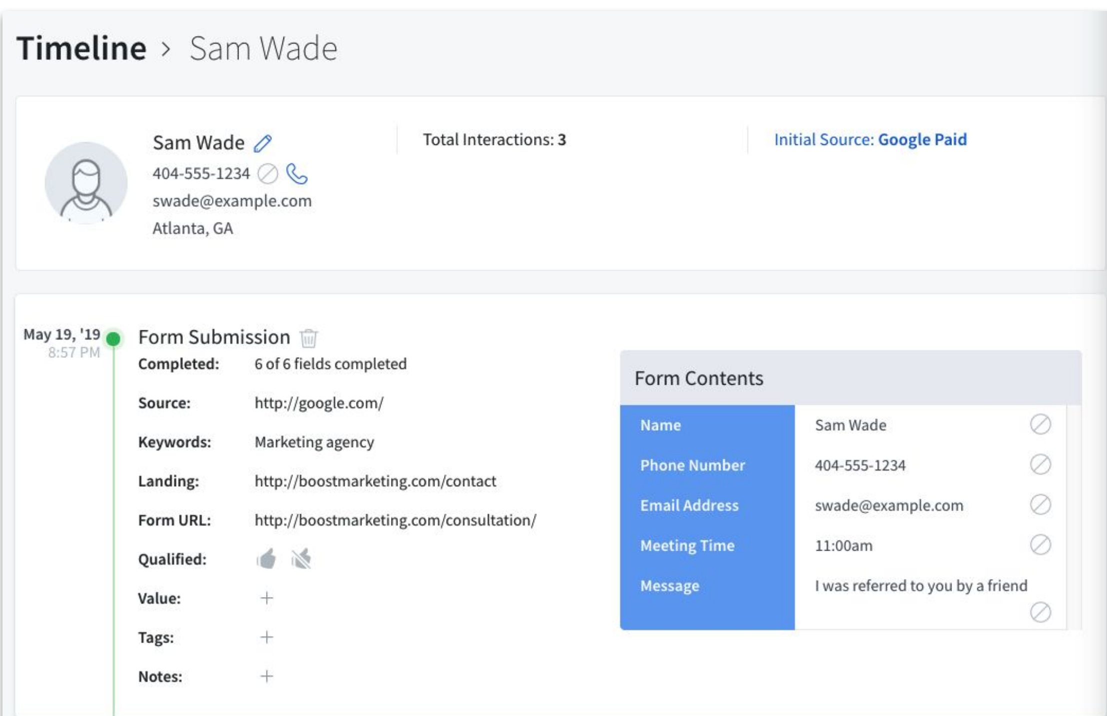
Use your form submission log to monitor the volume of form submissions coming into your business. We'll show important information about customers who fill out a form on your website alongside every other interaction they've had with your business. Data collected includes:

- Contact name
- Marketing source
- Date of form submission
- Form contents

You can access each of your submissions from your forms activity log. Here, you'll gain an overview of your form submission volume and find links to print or export your form activity. Follow these instructions to access submission logs.

Visitor Timeline

The form submission timeline shows each form submission, text message, and phone call in one cohesive place. You are able to access the entire customer journey and all associated interactions with the ability to drill down and see conversations from calls and forms. Besides your Form Attribution reports, this is a great place to see the first-touch interactions a customer has with your business.



SECTION THREE

Pairing with your favorite platforms

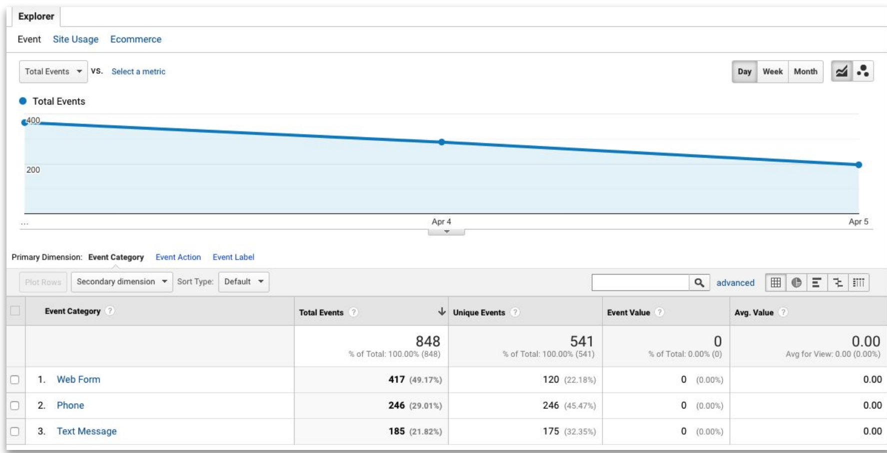
Google Analytics

Form submissions you receive in CallRail can be tracked in Google Analytics as events for a goal you've set. To properly track CallRail activity within Google Analytics, you must set up a goal. Events are also available to track within Google Analytics, but will not capture the information we send correctly.

Goals track actions that affect revenue, such as arriving at a certain page. Events track visitor behavior, such as video views and button clicks.

Once your goal has received form submissions, you can view your form data in your Google Analytics account. As a note, it can take up to 24 hours once you integrate with Google Analytics for your goals to begin reporting.

Use these [instructions]() to create a form goal that reports all forms received by the company's you've integrated with Google Analytics.



Google Ads

CallRail makes it possible to track form submissions as conversions in Google Ads. Once your integration with Google Ads is active, we'll report your Google PPC form submissions to Google Ads as conversions. Our Google Ads integration captures the Google click ID (gclid) for each of your website visitors. When a form is submitted, Google Ads recognizes the click ID we send and creates that form submission as a conversion automatically.

Use this set of [instructions]() to find your form conversions in Google Ads.

Microsoft Ads

Track form submissions as conversions by integrating with Microsoft Advertising—we'll report your Bing PPC form submissions as offline conversions. Use this set of [instructions]() to find your form conversions in Microsoft Advertising.

HubSpot

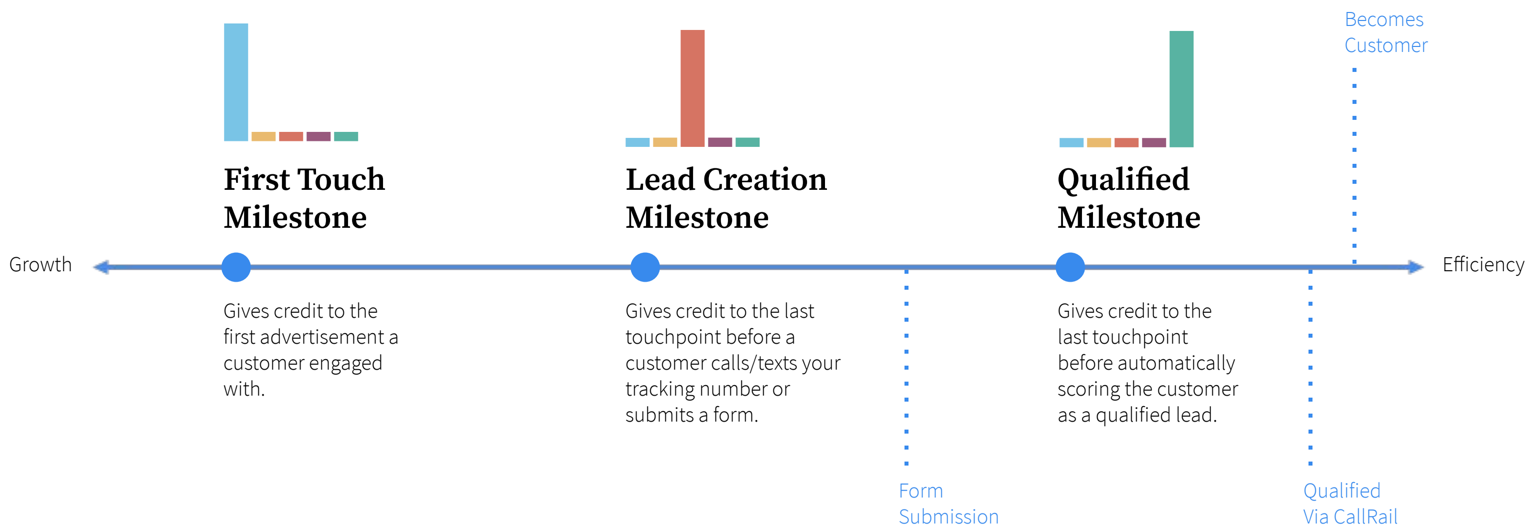
Integrating CallRail with your HubSpot account allows you to send form submissions data, including names, contact information, and contents directly to your HubSpot contact activity timelines for a unified look at your lead management. When you receive a form submission, you'll be able to view the submitter's contact information and see activity info like lifecycle stage, first and last touch, and recent interactions all inside your HubSpot timelines.

Use these [instructions]() for each company you'd like to integrate with HubSpot.

SECTION FOUR

Reporting

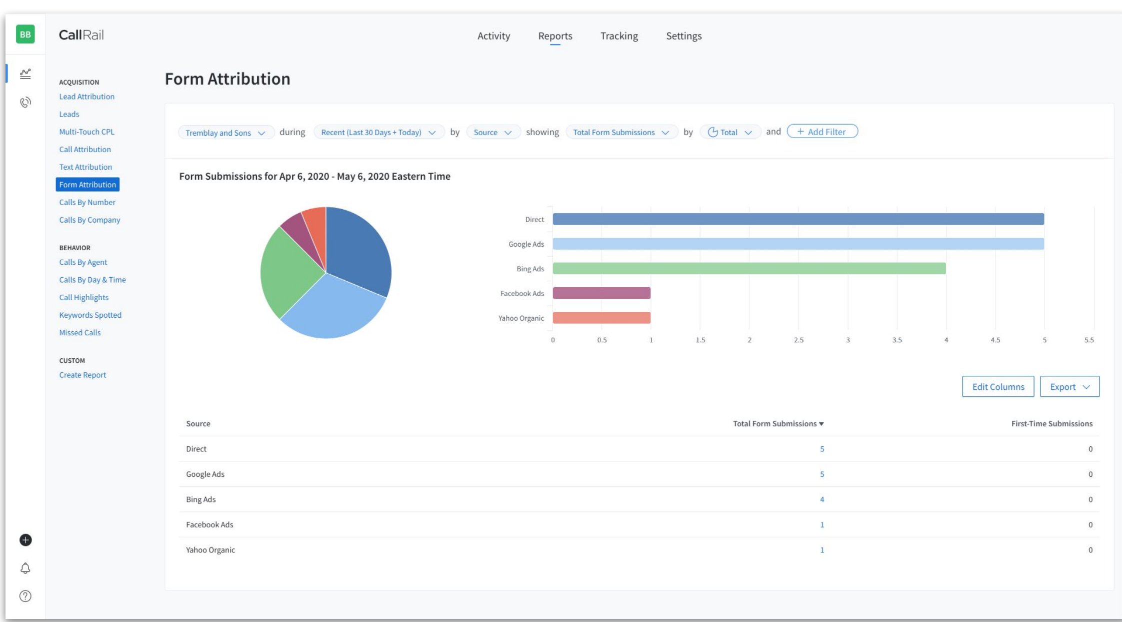
By activating Form Tracking for your account, you'll have a full view of every touchpoint in the buyer's journey, along with reporting that gives proper attribution to every single channel, ad, campaign, or keyword. In addition, by pairing Form Tracking with our Call Tracking product, you unlock new, robust reporting that enables you to see full-funnel attribution data for your business.



Form Attribution

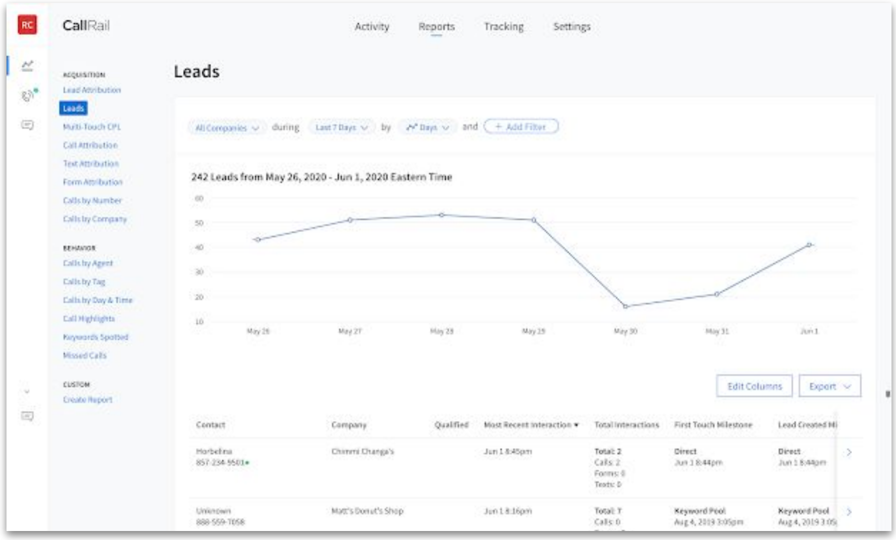
The Form Attribution report provides insight into the sources and interactions that are driving traffic and generating form submissions on your website. This report is available at the account-level for an entire account and at the company-level for individual sub-accounts. Admin users will be able to access this report for an entire account.

To learn more about our Form Attribution report, check out these instructions.



Leads Report

View a list of all of your leads, at a glance. Analyze the touchpoints a lead has with your business, alongside milestones that moved a prospect from one stage of the sales funnel to the next. Diving into the lead will bring you to the lead's timeline, giving you a visual timeline of how the lead interacted with your business. Form contents, as well as call recording and transcripts, are available to analyze the lead a little deeper.



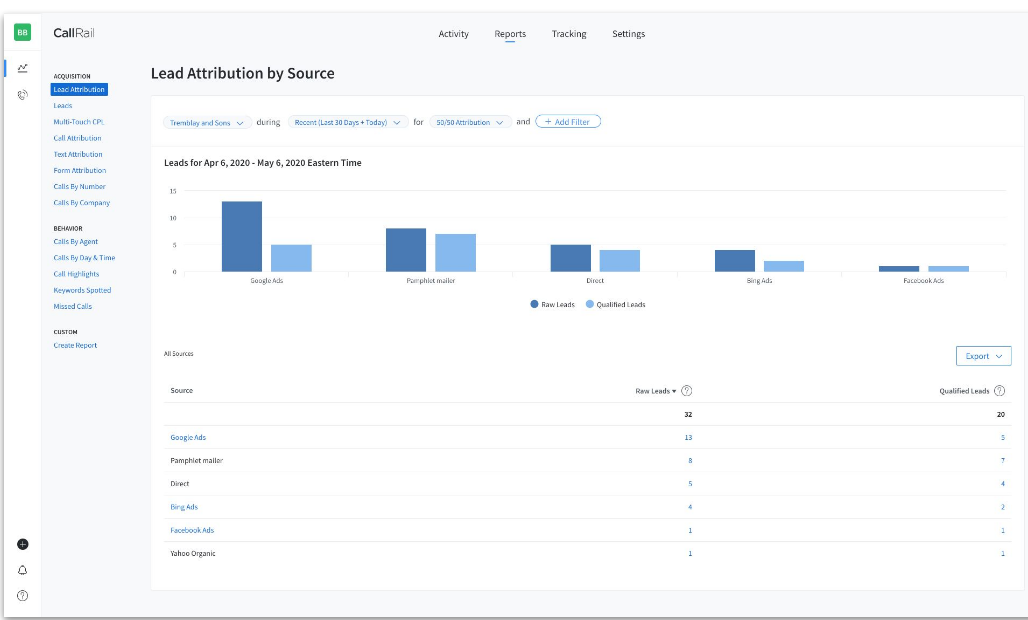
Use these [instructions] to learn more about our Leads report that showcases a customer's journey to becoming a lead.

Lead Attribution Report

The Lead Attribution report shows which marketing sources are driving raw and qualified leads for your business at specific points in the sales funnel, using our multi-touch attribution modeling. You'll get a combined view of all sources and interaction types you're tracking in CallRail at each stage in the sales funnel using multi-touch attribution.

Like the Leads report, you can easily click into each individual lead, and track their journey. For example, if a lead filled out a form and then called your business, the attribution for each would be captured under the same lead and given credit at the right part of the sales funnel for reporting.

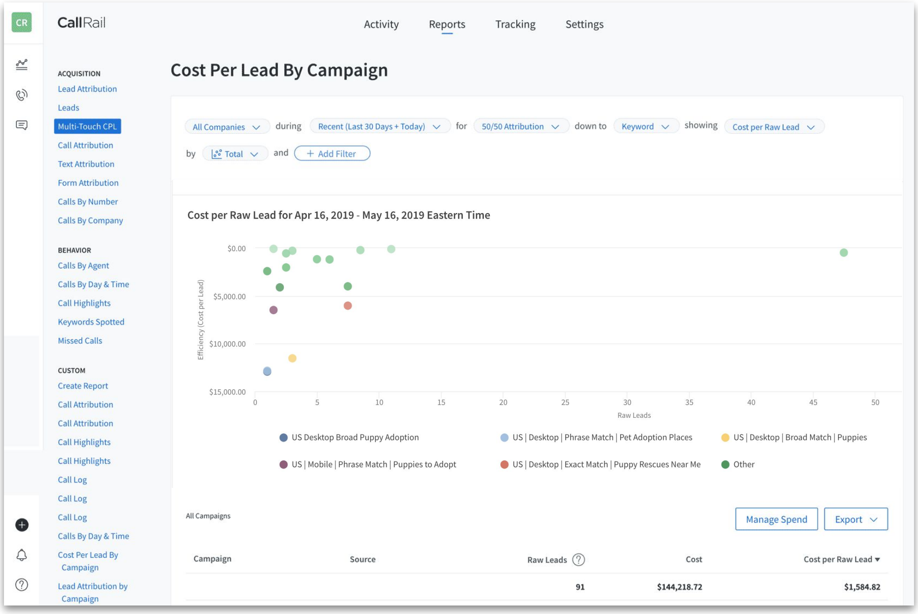
Check out these [instructions] to learn more on the Leads Attribution report.



Multi-Touch Cost Per Lead Report

Allocate your resources to the most cost-effective marketing campaigns by using the Multi-Touch Cost per Lead report. This report ties your inbound call, text, and form submission data to ad spend from Google Ads, Facebook, and Microsoft Ads. CallRail will automatically calculate how much your leads cost based on the ad spend, giving you the ability to see what sources, campaigns, ads, and keywords are driving the highest-value, low-cost leads.

For example, if you see that a particular Google paid campaign is driving more form leads at a lower cost than a particular Microsoft paid campaign, you have the data and knowledge needed to efficiently pivot and optimize your campaign or strategy. Get a unified view of all your campaigns from different platforms in CallRail's reporting dashboard.



You can calculate cost per lead based on five attribution models in the CallRail app:

- First Touch
- Lead Creation
- 50/50
- W-Shaped
- Qualified

Each model attributes lead credit to different milestones in the sales funnel, so you can see which ads drive which kinds of interactions and compare it to the cost of the ad. Choosing different attribution models change your cost per lead total based on how that model weighs each milestone.

Use these detailed instructions to access your Multi-Touch Cost per Lead report for a specific company.

Custom Reports

Pick and choose datasets and graphs that keep your clients focused on metrics demonstrating the impact of your work. You can drill down into specific timeframes or sort by a specific source or campaign. And once you've sorted and customized your report, you can export it to multiple formats.