

Google Tools Checklist

GA3 | GA4 | Google Ads | CTM

Our Google Tools Checklist is designed to help you better understand what data CTM is currently sending into Universal Analytics and Google Ads. You can also use it to help strategize how you want to send data into the new Google Analytics 4 (GA4).

Before starting this checklist, ask yourself “What are my goals and objectives when it comes to my Google tools – and data?”

Step 1: Optimize GA3 for GA4 success

Google will be sunsetting GA3 in July of 2023. This is a bi-directional integration. We strongly recommend that you continue sending data into GA3 until it retires.

**GA3 is the only way Performance plan customers can pull in Google paid campaign attribution*

In CTM:

- Integration connected
- Sending online events
- Sending offline events
- Categorizing by activity type
- Callsale events
- Event filtering
- Duplication prevention
- Using Event workflows (triggers)

It's important to know what you're doing in GA3 so you can mimic it in GA4

- Are your events reporting?
- How about your event-based goals?
- Are you connected to Google Ads?
- Are your goals imported into Ads?

Notes

Step 2: Let's translate that to GA4

To connect to GA4 the user must be at an editor level (or higher).

In CallTrackingMetrics:

- Integration connected
- Sending online events
- Sending offline events
- Categorizing by activity type
- Callsale events
- CTM event parameters mapped?
- Using event workflows (triggers)

In GA4, are your:

- Events successfully reporting in GA4?
- CTM events marked as conversion(s)?
- Account(s) connected to Google Ads?
- Conversions imported into ads?

Knowledge is Power! More Resources

Google | [Introducing Google Analytics 4 \(GA4\)](#)

Google | [\[UA-GA4\] Comparing metrics: Google Analytics 4 vs Universal Analytics](#)

Google | [\[GA4\] Monitor events in DebugView](#)

CTM Blog | [Preparing for the Difference Between GA4 and Universal Analytics](#)

CTM Blog | [Google Ads and Call Tracking: Closing Data Loops](#)

CTM | [Google Tools Boost Pack](#)

Notes

Step 3: Tie it into Google Ads

Notes

Let's walk through your configuration inside of Google Ads.

In Google Ads:

- Call forwarding enabled
- CallTrackingMetrics selected as the call analytics provider
- CTM tracking number used for call extension numbers
- Auto-Tagging enabled
- CTM Tracking code on all landing pages
- Connected to GA3
- Connected to GA4
- Connected to Search Console

Conversions:

What do you want the "source of truth" to be for your conversions (i.e. primary source)?

Choose your (1) primary and (2) secondary sources and how you want to count conversions.

Remember! Your unique strategy and goals should determine your primary source.

GA3

- Primary conversion
- Secondary conversion
- Count one
- Count every

CTM data from Google Ads Direct Connect

- Primary conversion
- Secondary conversion
- Count one
- Count every

GA4

- Primary conversion
- Secondary conversion
- Count one
- Count every

Other

- Primary conversion
- Secondary conversion
- Count one
- Count every

Step 4: Close the loop with CTM

Notes

Make sure your workflows and configurations inside of CTM are closing the loop on sales.

Google Ads Direct Connect

Do you want to separate your Google Ads extension conversions from your session-based conversions?

What type of conversions do you want to send into Google Ads?

All Activities (select all that apply)

Calls

Forms

SMS

Chats

First-time contacts only

Sales/Revenue

Other

Activities by direction

Inbound

Outbound

Qualifying metrics

Tags

Talk time

Status

Field update

Converted

Something else?

Tracking Source:

Google Ads

Ad Extensions

Google My Business onsite

Google My Business offsite

Custom sources:

Successful DNI Swap

Tracking Source Details:

First or last touch attribution

Analytics defaults set (GA3 only)

Step 5: Build it!

Now that you know how you want to prioritize your data flow between CTM, Universal Analytics, GA4, and Google Ads, you can use this checklist as a guide to build and confirm your setup between all four platforms.

Need More Help?

Let our Professional Services team take the stress out of optimizing your Google tools with our [Google Tools Boost Pack](#). Reach out to your account executive to get started.

The Google Tools Boost Pack is available to customers on our Growth and Connect plans.

**GOOGLE TOOLS
BOOST PACK**

BASE PRICE

\$750

COMPLETION TIME

3 hours

On a Performance Plan?

Consider leveling up on a [Growth Plan](#). You'll unlock features and benefits designed to help you get more from your ad spend and boost revenue.