

How to Create & Setup Google Analytics, Google Tag Manager and Google reCaptcha

1) Making a brand new master email account for new clients

- 1) Create a new gmail account using the client's business name
 - 1) First and last name for the gmail - use the business name
 - 2) Make sure the account type is selected on "**Business**"
 - 3) Date of Birth - pick a random birthday that guarantees the account is older than 18 years old
- 2) For choosing a password use the following password generator:
 - 1) Norton Password Generator (<https://my.norton.com/extspa/passwordmanager?path=pwd-gen>)
 - 2) Move the slider down from 20 to 11 characters and *click* the "**Refresh**" icon on the left side next to "**Copy Password**" to generate a password that is satisfactory
 - 3) Then *click* "**Copy Password**"
- 3) Go back to the CRM and under Organizations - search for the client's business and in Client Accounts - fill out the form to insert the email and password you created

2) Making Google Analytics Account

- 1) Make sure you are signed in to the master gmail account while logging in to Google Analytics
- 2) *Click* "**Start Measuring**"
- 3) In "**Account Details**", *enter* in the Business Name of the Organization

- 4) Under "**Account Data Sharing Settings**", leave everything that is already pre-selected and click "**Next**"
- 5) In "**Property Details**" enter in the Business Name of the Organization
- 6) For "**Reporting Time Zone**" leave it selected on the United States and (GMT-8:00) Los Angeles Time
- 7) For "Currency" leave it selected on US dollar (\$)
 - 1) **DISCLAIMER:** If the client's business is located outside of the United States, you will need to change the *Reporting Time Zone* and *Currency* that correctly corresponds with the country they are located in
- 8) Click "**Next**"
- 9) For "**Business Details**" you will need to select an industry category and also select an accurate size of the business (Employee Size)
- 10) Select and "**Industry Category**" that accurately reflects the client's Business
 - 1) If the Industry Category you are looking for is not listed in the drop down options, select "**Other**"
 - 2) For "**Business size**" you are generally going to select "**Medium**" (this option does not heavily affect data analytics collection)
- 11) Click "**Next**"
- 12) For "**Choose your business objectives**" select "**Get baseline reports**" (This option essentially acts like an all of the above)
- 13) Then click "**Create**"
- 14) You will now be viewing the "**Google Analytics Terms of Service Agreement**"
 - 1) Where it says - To use Google Analytics you must first accept the terms of service agreement for your country / region - United States is pre-selected by default, keep this pre-selected for the client's business located in the United States. However, if the client's business is not located in the United States, you will need to change the country before accepting the service agreement
- 15) Click "**I Accept**"
- 16) Under "**Start Collecting Data**" where it says *Choose a platform*, select "**Web**"

- 17) Now we will set up the web stream, enter in the "Website URL" exactly how it is displayed in the field and for "Stream Name" enter the Business Name of the Organization
- 18) Click "**Create and continue**" and then click "**Next**"
- 19) You will now be prompted to "**Set up a Google Tag**", instead you are going to want to close that window because that step is not necessary - click on the "**x-icon**" on the top left
- 20) Another window will be opened showing you the "**Web stream details**" for the Google Analytics account you created - you are going to want to copy the "**Measurement ID**" - we will need this for when we create the Google Tag Manager account

3) Making Google Tag Manager Account (Part 1)

- 1) Make sure you are signed in to the master gmail account while logging in to Google Tag Manager
- 2) Click "**Create Account**"
- 3) Under "**Account Setup**", enter the *Account Name* (Business Name of the Organization)
- 4) For "**Country**", leave it selected on the *United States*
 - 1) **DISCLAIMER:** If the client's business is located outside of the United States, you will need to change the country
- 5) Under "**Container Setup**" enter the website url without the (www)
- 6) For "**Target Platform**" select "**Web**"
- 7) Click "**Create**"
- 8) You will then be prompted to view the "**Google Tag Manager Terms of Service Agreement**", go ahead and accept the terms and conditions and click "**Yes**"
- 9) The Google Tag Manager account has now been created and you should also be viewing the "**Installing Google Tag Manager**" prompting you to copy the following code(s) - you will not do this and instead click on the "**x-icon**" in the top right

4) Making Google Tag Manager Account - Wordpress Integration (Part 2)

- 1) After creating the Google Tag Manager account, you will be viewing the **"Workspace"** view of the platform
- 2) In the top right you should see a Google Tag Manager ID beginning with three letters (GTM-XXXXXXX) - You are going to *copy* this code
- 3) Now we will go to **"Wordpress"** (<https://wpmudev.com/>)
- 4) After logging-in to "Wordpress", you are going to want to find the client's website and then *click* the **"W-icon"** (Wordpress Icon) on the right hand side
- 5) You are now viewing the backend of the website - on the left hand side you will see various menus such as the following: *Posts, Media, Pages, Comments* etc
- 6) You will want to find and *click* **"Plugins"**
 - 1) Within **"Plugins"** you will be viewing *installed plugins* - find the plugin that is called **"GTM4WP - A Google Tag Manager (GTM) plugin for WordPress"**
 - 1) If that plugin is not there in the installed plugins overview - you are then going to want to install it by clicking **"Add New Plugin"** located on the left in the vertical menu under **"Plugins"** - and then we will need to search for the *GTM4WP - A Google Tag Manager (GTM) plugin for WordPress* and *click* **"Install Now"**
 - 2) Now go back to the **"Installed Plugins"** overview and find the *GTM4WP - A Google Tag Manager (GTM) plugin for WordPress* and *click* **"Activate"**
 - 3) Then *click* **"Settings"** and you should now be viewing the **"Google Tag Manager for Wordpress options"**
 - 4) Where it says - *Google Tag Manager ID* - enter or paste the GTM-XXXXXXX ID you copied from the Google Tag Manager account
 - 5) Where it says - *Container code ON/OFF* - select **"On"**
 - 6) Where it says - *Container code compatibility* - make sure **"Off"** is the one selected

7) Click "**Save Changes**"

- 1) Now once the changes have updated, you should notice that the "**Container Code ON/OFF**" setting you originally selected is now back to "**Off**" instead of "**On**" - in order for this option to stay selected on "**On**", you will need to re-select "**On**" again and then click "**Save Changes**" -
Now the Google Tag Manager ID settings are correct

8) Google Tag Manager and Website integration is now successfully completed

5) Making Google Tag Manager Account - Import Website Tags (Part 3)

- 1) Go back to the client's Google Tag Manager you created
- 2) Now we will import the mandatory Tags that are necessary to link to the website
 - 1) Login to the **OCG_NAS1**, select "**IM Development**" and then select "**Tag Manager Templates**"
 - 2) The following Tags we will import into Google Tag Manager are:
 - 1) GA4 Tag.json
 - 2) GA4 Matomo.json
 - 3) GA4 Form Submission AJAX Success.json
- 3) In Google Tag Manager click "**Admin**"
- 4) Under "**Container**" click "**Import Container**" and then click "**Choose container file**"
- 5) In your file explorer click the **OCG_NAS1**, select "**IM Development**" and then select "**Tag Manager Templates**"
- 6) Select the "**GA4 Tag.json**" Tag and click "**Open**"
- 7) Make sure that the "Default Workspace" is selected
- 8) For "**Choose an import option**" select "**Merge**" and make sure "**Overwrite conflicting tags, triggers and variables**" is also selected
- 9) Then click "**Add to workspace**"
- 10) Repeat steps 4 - 9 for the last two Tags

- 11) Now in the client's **Google Tag Manager** under "**Default Workspace**" click "**Tags**"
- 12) Click the "**GA4 Tag**" and under "**Tag ID**" enter or paste the "**Measurement ID**" from the Google Analytics account
- 13) Click "**Triggering**" and select "**Initialization All Pages**" and then click "**Save**"
- 14) Lastly in the client's "Google Tag manager" at the top where it says "Workspace Changes" click "**Submit**" - this will confirm and apply all the Tags to the website

6) Linking Matomo Analytics to Google Tag Manager

- 1) Log in to Matomo (<https://matomo.ocg.marketing/>)
- 2) In the top right, click "**All Websites**" and scroll all the way down - click "**Add a new website**"
- 3) For the "**Name**" enter in the Business Name of the Organization
- 4) For "**URLs**" enter in the full url of the website
- 5) Scroll down and make the "**Currency**" and "**Time zone**" correspond accurately with where the client's business is located
- 6) Then click "**Save**"
- 7) You should now see a window presenting you with the Matomo HTML Tag code created for you when adding the new website.
- 8) Copy the Matomo HTML Tag code and go back to Google Tag Manager
- 9) Under "**Default Workspace**" click "**Tags**"
- 10) Click the "**Matomo Tag**" and in the HTML box, paste the Matomo HTML Tag code
- 11) Then click "**Triggering**" and select "**All Pages**" and then click "**Save**"
- 12) Lastly in the client's "Google Tag manager" at the top where it says "Workspace Changes" click "**Submit**" - this will confirm and apply all the Tags to the website

7) Creating and Setting Up Google reCaptcha

- 1) Make sure you are signed in to the master gmail account
- 2) Go to the following website: (<https://www.google.com/recaptcha/about/>)
- 3) In the top right, *click* "**v3 Admin Console**"
- 4) For the "**Label**" enter in the website domain without the (www)
- 5) For the "**reCaptcha type**" make sure to select "**Challenge (v2)**"
 - 1) Then select the type: "**I am not a robot**"
- 6) For "**Domains**" you will need to list / enter all three types:
 - 1) E.g. - [example.com](#)
 - 2) E.g. - example.tempurl.host
 - 3) E.g. - example.staging.tempurl.host
- 7) For the "**Google Cloud Platform**" project name text field, enter in the name of the business
- 8) Agree to the "**Google Cloud Platform Terms of Service**"
- 9) *Click* "**Submit**"
- 10) Google reCaptcha will take a few seconds to successfully set-up and once that has been processed, it will show you **two keys** that we will need to copy (account for):
 - 1) HTML Code Site Key
 - 2) Secret Key
- 11) Before we validating the two keys, go back to the Settings of the reCaptcha you created and for "**Security Preference**" make sure to drag the slider all the way to the right for "**Most Secure**" and then *click* "**Save**"

- 12) Go back to *Wordpress* and access the backend of the website we will paste in the *Google reCaptcha* keys
 - 1) On the left hand side where the various menus are located, find and with your mouse *hover* over "**Fluent Forms**" and *click* "**Global Settings**"
 - 2) In "**Global Settings**" scroll down to the "**Miscellaneous**" section and make sure "**Enabled Honeypot Security**" is turned On
 - 3) On the left hand side within the "Fluent Forms" various drop down menus: "**General**", "**Payment**", "**Security**", "**Managers**", "**Double Opt-in**", "**Inventory Manager**" and "**Configure Integrations**"
 - 4) *Click* "**Security**" and then *click* "**reCaptcha**"
 - 5) For "**reCAPTCHA Version**" make sure to select the corresponding version you created and in this instance , you would select "**Version 2 (Visible reCaptha)**"
 - 1) Then paste the two following keys in their corresponding text fields and then *click* "**Save Settings**"
 - 6) Now in *Wordpress* on the left hand side scroll until you find and with your mouse *hover* over "**Defender Pro**" and *click* "**Tools**"
 - 1) In "**Tools**" on the left hand side, *click* "**Google reCaptcha**"
 - 2) In "**Configure reCaptcha**" make sure to select the corresponding version you created and in this instance , you would select "**V2 Check box**"
 - 1) Then paste the two following keys in their corresponding text fields
 - 3) Then scroll down to the "**reCaptcha Locations**" settings and make sure "**login**", "**Register**", "**Lost Password**" and "**Comments**"
 - 4) Then *click* "**Save Changes**"
 - 7) Once both steps have been completed, in *Wordpress* go to "**Hummingbird Pro**" and clear the cache