

# Introduction to Heeet for Marketers

Version 2024.1

## Objectives:

- Implement Heeet Javascript on your website
- Understand the Heeet data in Salesforce.
- Heeet advanced features overview.
- Discover default reports available and report customization

## SUMMARY

- ADDING HEEET JAVASCRIPT TO YOUR WEBSITE
- SALESFORCE – GA4 INTEGRATION
- CONNECT PAID PLATFORMS DATA (Google Ads, Facebook Ads,..) WITH SALESFORCE
- SEND SALESFORCE CONVERSIONS TO GOOGLE ADS
- SEND SALESFORCE CONVERSIONS TO LINKEDIN ADS
- INTRODUCTION TO HEEET DATA ON SALESFORCE LEADS
- INTRODUCTION TO HEEET DATA ON SALESFORCE OPPORTUNITIES
- INTRODUCTION TO HEEET DATA ON SALESFORCE CAMPAIGNS
- INTRODUCTION TO HEEET DATA ON SALESFORCE CAMPAIGN SNAPSHOTS
- INTRODUCTION TO HEEET SALES ACQUISITION COSTS FEATURE
- DEFAULT SALESFORCE REPORTS
- CUSTOMIZING SALESFORCE LIGHTNING LAYOUTS

# ADDING HEEET JAVASCRIPT TO YOUR WEBSITE

# 1. Adding Heeet Javascript on your website

In order to start tracking your prospect on your website, use the Javascript on the right hand side.

Here are more details about each parameter.

**sessionDuration**: number of minutes before Heeet refresh the last click data. In this example 1440 minutes = 1 day. If a lead comes today from last click = SEO, this value will remain the same until tomorrow, even if it comes back from SEA in between.

**contentInfluenceTrackedPages** [not mandatory]: set what content you want to track as « Content Influence » in Salesforce. For example if you want to track all your blogs articles, just add '/blog' and Heeet will track all contents from page containing it. If you want to track your single pricing page, just add '/pricing' in this part.

**enabledDomains** [not mandatory]: this parameter is being used if you're using subdomains. For example if your main site redirects to a subdomain where your forms are being hosted, then this line will transfer tracking data from first site to the other one.

**ga4MeasurementID** [mandatory]: this is your GA4 Measurement ID which can be find in GA. Go to Admin > Data Collection and Modification > Data Streams and select the relevant website Data Stream.  
Measurement ID always start with G-XXXXXX

**formCssSelector** [mandatory]: this is the CSS class of the form you want to track. You can add multiple CSS values in this selector if you're tracking multiple forms on your website.

**data** [mandatory]: being used to send tracking data to Salesforce, make sure that your form includes a field with API Name called Heeet\_\_Data\_\_c which should be mapped to Salesforce Heeet\_\_Data\_\_c field (included in the package)

**contentInfluences** [not mandatory]: being used to track what targeted contents the prospect visited on your website. Make sure that your form includes a field with API Name called Heeet\_\_Content\_influences\_\_c which should be mapped to Salesforce Heeet\_\_Content\_influences\_\_c field (included in the package).

**selfattribution** [not mandatory]: if you want to track « self reported attribution » and use it in your attribution model, add a picklist field on your website (« How did you hear from us ? » for example).  
This field API name in your form should be called Heeet\_\_Self\_Report\_Attribution\_\_c and be mapped with Salesforce Heeet\_\_Self\_Report\_Attribution\_\_c field (included in the package).

```
<script>
heeetSaveJourney({
    sessionDuration: 1440,
    contentInfluenceTrackedPages : ['/pricing', '/blog'],
    enabledDomains : ['https://www.app.heeet.io']
})
</script>

<script>
heeet({
    ga4MeasurementId: 'G-xxxxx',
    formCssSelector: ['.hbspt-form', '.contact-form'],
    data : 'Heeet__Data__c',
    contentInfluences : 'Heeet__Content_influences__c',
    selfAttribution : 'Heeet__Self_Report_Attribution__c'
})
</script>
```



# SALESFORCE – GA4 INTEGRATION

# Salesforce – GA4 Integration

Add a GA4 account in Heeet settings.

Heeet allows you to send any offline conversions data from Salesforce to GA4.

In order to use this feature you first need to configure a GA4 account.

- Go to Heeet > Settings > Google Analytics (A)
- Click on Create (B)
- Give a name to this GA4 Account (ie: Heeet) (C)
- Go to GA4 > Admin > Data Collection and Modification > Data Streams and select the relevant website Data Stream. Measurement ID always start with G-XXXXXX Then paste it in the Measurement ID field (D).
- Go to GA4 > Admin > Data Collection and Modification > Data Streams > Select the relevant website Data Stream and scroll down to the Measurement Protocol API secrets sections.

Click on Create and copy paste the API Secret in the settings field €

The screenshot shows the Heeet web interface. At the top, there's a search bar and navigation icons. Below that, a navigation menu includes 'Heeet', 'Settings', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Campaigns', 'Campaign Snapshots', and 'More'. The main content area is titled 'Heeet API Key and Settings' and has a 'Create' button highlighted with a red circle 'B'. The left sidebar has a 'Google Analytics' section highlighted with a red circle 'A'. The main content area contains several form fields: '\*Version' (dropdown menu with 'GA4' selected), '\*Name' (text input field with a red circle 'C'), '\*Measurement Id' (text input field with a red circle 'D'), and '\*API Secret' (text input field with a red circle 'E'). A 'Save' button is located at the top right of the form area.

# Salesforce – GA4 Integration

## Create Data Trigger

Once you added a GA4 account, you can create a « data trigger ».

A trigger is an event happening in Salesforce that should be sent to GA4 as an event.

To create your first event, go to

- Go to Heeet > Settings > Google Analytics > Event Triggers
- Click on « New »

The screenshot shows the Heeet user interface. The top navigation bar includes the Heeet logo, a search bar, and various menu items like Leads, Accounts, Contacts, Opportunities, Campaigns, and Campaign Snapshots. The main content area is divided into two columns. The left column contains settings for API Key, Attribution Model, Campaign, Sales Acquisition Costs, and Integrations. The right column is titled 'Event Triggers' and features a 'New' button and a table of existing triggers. A red circle 'A' highlights the 'Event Triggers' tab, and another red circle 'B' highlights the 'New' button. Below the table, there are expandable sections for 'Salesforce Converted Lead' and 'Closed Won Opp', with 'Salesforce Converted Lead v4' selected. A 'Save' button is located at the bottom right of the table area.

**Heeet API Key and Settings**

Global Settings

**Attribution Model**

Pre Acquisition Revenue Attribution

Pre/Post/Self Reported Acquisition Revenue Attribution

Opportunity Revenue Attribution

**Campaign**

Automated Campaign and Campaign Member creation

Snapshot Type

**Sales Acquisition Costs**

Meeting/Email Costs Calculation

**Integrations**

Audience Triggers 1

**Google Analytics** 7

Google Ads 1

Google Local Services 1

**Event Triggers**

Create List **A**

**B** New

Name	Object	Enabled	
Salesforce Converted Lead	Lead	✓	▼
Closed Won Opp	Opportunity	✓	▼
Salesforce Converted Lead v4	Lead	✓	▼
New Trigger Opp 2	Opportunity	✓	▼
Heeet Demo - Lead Converted	Lead	✓	▼
Disqualified Leads	Lead	✓	▼
Xendit Test	Lead	✓	▼

> Salesforce Converted Lead

> Closed Won Opp

▼ [Salesforce Converted Lead v4](#)

Save

# Salesforce – GA4 Integration

## Create Data Trigger

- Give your Trigger a unique name (A)
- Select what object this trigger is based on (B)
- Check the « Enabled » checkbox to activate it (C)
- Select GA4 account(s) this event should be sent to (D)

The screenshot shows the 'New Trigger' configuration page in Salesforce. It includes a 'Save' button in the top right corner. The form contains the following fields and options:

- \*Name:** A text input field containing 'New Trigger', marked with a red circle 'A'.
- \*Object:** A dropdown menu showing 'Lead', marked with a red circle 'B'.
- Enabled:** A checkbox that is checked, marked with a red circle 'C'.
- Select Options:** A section with two columns: 'Accounts' and 'Selected'. The 'Accounts' column contains a list of GA4 accounts: 'Heeet2 (UA-176436632-2)', 'UKLID DEV (UA-148166815-1)', 'max (UA-100332227-1)', 'GA4 (G-JH56V0K25W)', 'Uklid GA4 (G-224VESEDSJ)', and 'HEEET DEMO (072023) (G-P3LPBVT08Z)'. A red circle 'D' is placed over the 'Heeet2' account. The 'Selected' column is currently empty.

# Salesforce - GA4 Integration

## Create Data Trigger - Conditions

You can define what should be the Salesforce conditions to activate this trigger and send the data to GA4.

- Click on « Add »
- Select the field on which you want to apply a condition
- Fill in the value which should trigger the event  
Please note that you have to paste the API name of the field value.

Exemple:

You want to send an event to GA4 when a lead is converted. Then you will have to select the API name of the Lead Status field

**Conditions (1)** A

\* Fields B Value C

Lead ID (ID)

Closed - Converted

**Lead Status Picklist Values**

Action	Values	API Name
<a href="#">Edit</a>   <a href="#">Deactivate</a>	Open - Not Contacted	Open - Not Contacted
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Working - Contacted	Working - Contacted
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Closed - Converted	Closed - Converted

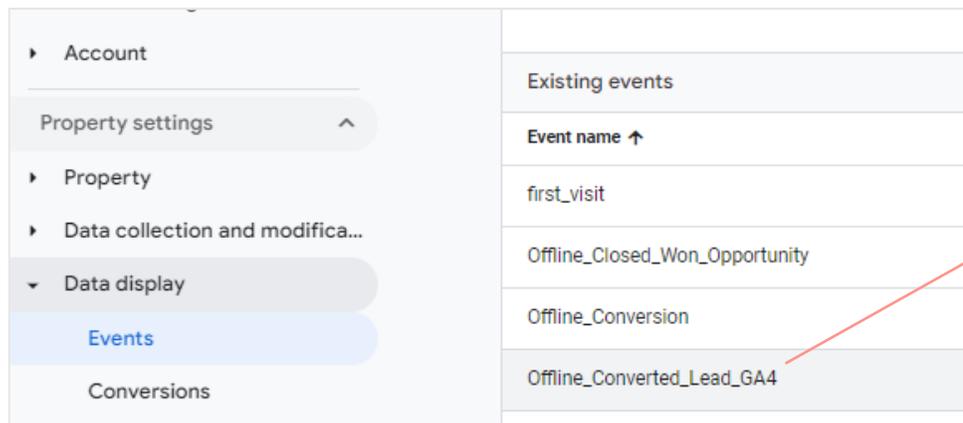
# Salesforce – GA4 Integration

## Create Data Trigger - Values

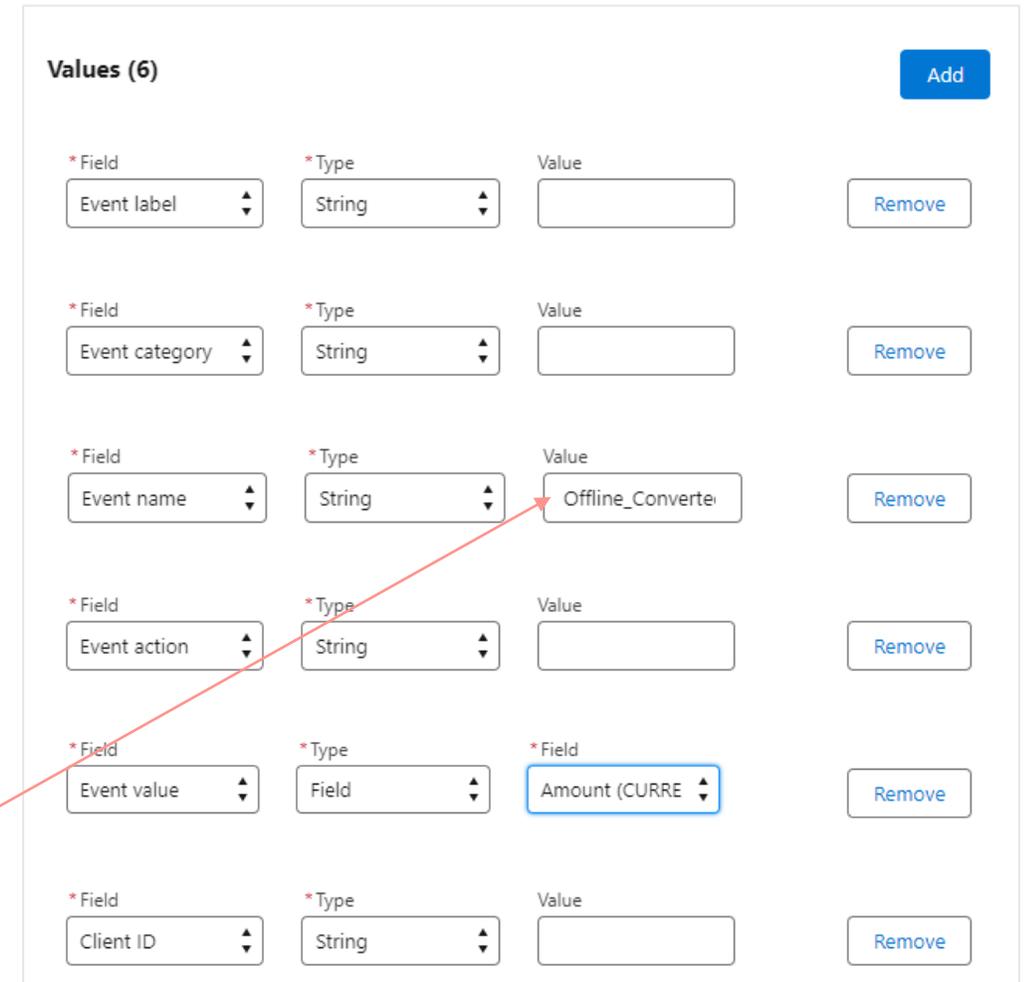
Once you completed the Conditions part, you can customize the Event values.  
You can send either a String value, a Number value or use a Field value from the selected object.

We usually recommend to use the following Event Fields.

- Event Category: we usually tell our customers to use a generic value to easily find all events related to a specific Category such as « Salesforce Offline Event », we recommend to use a **string** value,
- Event Label: here you can set a clear label such as « Converted Lead » or « Salesforce Closed Won Opportunity », we recommend to use a **string** value,
- Event Action: you can set a **string** value such as « Heeet Automated Event »
- Event Value: usually we recommend our customers to use a number field set to 1 for unique events such as « converted leads » but to use an object value for transactional event such as « closed won opportunity ». If you want to send the Amount Opportunity value, then select type = Field and value
- Event Name: you need to create first an event in GA4 and use the exact same event name as string value



The screenshot shows the GA4 interface. On the left, a sidebar menu has 'Events' selected. The main area displays a list of existing events under the heading 'Existing events'. The events listed are 'first\_visit', 'Offline\_Closed\_Won\_Opportunity', 'Offline\_Conversion', and 'Offline\_Converted\_Lead\_GA4'. The 'Offline\_Converted\_Lead\_GA4' event is highlighted with a blue background. A red arrow points from this event name to the 'Offline\_Converted' value in the 'Values' configuration panel on the right.



The screenshot shows the 'Values (6)' configuration panel in GA4. It contains six rows, each with a field selector, a type selector, a value input field, and a 'Remove' button. The first five rows have 'String' as the type and empty value fields. The sixth row has 'Field' as the type and 'Amount (CURRE' as the value. A red arrow points from the 'Offline\_Converted' value in the third row to the 'Offline\_Converted\_Lead\_GA4' event name in the screenshot on the left.

*Field	*Type	Value	Remove
Event label	String		Remove
Event category	String		Remove
Event name	String	Offline_Converte	Remove
Event action	String		Remove
Event value	Field	Amount (CURRE	Remove
Client ID	String		Remove

CONNECT PAID PLATFORMS DATA (Google Ads, Facebook Ads,..)  
WITH SALESFORCE

# Connecting Paid Platforms with Salesforce

Heeet enables you to connect the following platforms data with Salesforce

- Google Ads
- LinkedIn Ads
- Facebook Ads
- Bing Ads
- TikTok Ads
- Google Local Services

To connect a Paid Platforms,

- Go to Heeet > Settings > Integrations (A)
- Then select the platform you want to connect (B)
- Click on « Sign in With.. » button on top right side (C)
- Then select a Start Date (D). We recommend to use today date in order to get accurate data and do not affect your campaign ROI. If you select a date in the past then Heeet will take campaign stats starting on that date, which could not reflect real costs, impressions and clicks data.
- Once you connected your account, put the Paid Platform Account Ids you want to connect with (E). You can add multiple account Ids. For Google Ads, make sure that connected account is not a « MCC » account.
- Finally, ask a Salesforce admin to open the developer console > Debug > Open Execute Anonymous Window and paste « platform » scheduling code (F). This will activate Salesforce sync with your paid platforms to retrieve your active campaigns data (impressions, clicks, cpc, budget, costs)

The screenshot displays the Heeet web interface. The left sidebar contains a menu with 'Integrations' highlighted, and 'Google Ads' selected. The main content area is titled 'Accounts' and 'Conversion Triggers'. It features a 'Sign in with Google' button (C), a 'Start Date' field set to '26 Sep 2023' (D), a code block for a scheduled sync (F), and a 'Maxime Rat' section with a 'Remove' button and 'Reconnect' and 'Save' buttons. Below this, there are input fields for 'Id' (107837752615028887582), 'Name' (Maxime Rat), and 'Customer Ids' (992-593-4056) (E). At the bottom, it shows 'Last Sync' and 'Last Conversion' dates.

SEND SALESFORCE CONVERSIONS TO GOOGLE ADS

# Send Salesforce conversions to Google Ads

- Go to Heeet Settings > Integrations > Google Ads (A)
- Click on « Conversion Triggers » (B) and on New (C)
- Give a name to your conversion trigger (ex: closed won opportunity)
- Select the connected Google Ads account, customer ID and existing Google Ads conversion (D)
- Select the triggering Salesforce object (E)

Please note that you have to paste the API name of the field value.

Exemple:

You want to send an event to Google Ads when a lead is converted. Then you will have to select the API name of the Lead « Status » field

- Select what amount field should be sent as conversion value (G)
- Finally, select what Gclid field (unique advertising ID associated to a user) should be used. (H)  
You can select either Heeet First Click Google Gclid or Heeet Last Click Google Gclid.

Tip: if you want to use first click Gclid if last click Gclid is missing or last click Gclid is first click Gclid is missing, ask a Salesforce Admin to build a Formula Field in Salesforce (« GCLID ») taking one or the other value.

The screenshot displays the Heeet Settings interface. The left sidebar shows the navigation menu with 'Settings' selected, and 'Google Ads' highlighted under the 'Integrations' section (marked with a red circle 'A'). The main content area is titled 'Conversion Triggers' (marked with a red circle 'B') and shows a 'New' button (marked with a red circle 'C'). The configuration is for a 'Closed Won Opportunity' trigger. The 'Name' field is 'Closed Won Opportunity'. The 'Account' is 'Maxime Rat', 'Customer Id' is '992-593-4056', and 'Conversion Action' is 'Prospect converti' (marked with a red circle 'D'). The 'Object' is 'Lead' (marked with a red circle 'E'). Under 'Conditions (1)', the 'Fields' are 'Status (PICKLIST)' and the 'Value' is 'Closed - Converted' (marked with a red circle 'F'). Under 'Values (2)', the 'Amount' is 'Amount (CURRENCY)' (marked with a red circle 'G') and the 'Fields' are 'Gclid' and the 'Value' is 'Heeet First Click Google Gclid (\$' (marked with a red circle 'H').

SEND SALESFORCE CONVERSIONS TO LINKEDIN ADS

# Send Salesforce conversions to LinkedIn Ads

- Go to Heeet Settings > Integrations > LinkedIn Ads (A)
- Click on « Conversion Triggers » (B) and on New (C)
- Give a name to your conversion trigger (ex: closed won opportunity)
- Select the connected LinkedIn Ads account, customer ID and existing LinkedIn Conversion Action (D)
- Select the triggering Salesforce object
- Add a condition and fill in the value which should trigger the event (E)  
Please note that you have to paste the API name of the field value.
- Select what amount field should be sent as conversion value (F)

Exemple:

You want to send an event to GA4 when a lead is converted.  
Then you will have to select the API name of the Lead « Status » field

The screenshot displays the Heeet Settings interface. On the left sidebar, the 'Integrations' section is expanded, and 'LinkedIn Ads' is selected, marked with a red circle 'A'. The main content area is titled 'Conversion Triggers' and marked with a red circle 'B'. A 'New' button is visible, marked with a red circle 'C'. Below this, the 'New Conversion Trigger' form is shown with the following fields: 'Name' (filled with 'New Conversion Trigger'), 'Account' (dropdown menu with 'Maxime Rat' selected), 'Customer Id' (filled with '507916037'), 'Conversion Action' (dropdown menu with 'Conversion API 1 - TES' selected, marked with a red circle 'D'), and 'Object' (dropdown menu with 'Lead' selected). Below the form, there are sections for 'Conditions (0)' and 'Values (1)'. The 'Values (1)' section has an 'Add' button marked with a red circle 'E' and a dropdown menu with 'Amount (CURRENCY)' selected, marked with a red circle 'F'. The bottom of the interface shows the Heeet logo.

# INTRODUCTION TO HEEET DATA ON SALESFORCE LEADS

- Heeet Data on Lead in Salesforce, what is an Heeet Influence?
- Heeet Influence Records Overview
- Heeet Data on Lead in Salesforce, what is a Content Influence?
- Automatically create campaign member when an influence is created.
- Create Salesforce Campaign if it does not exist.
- Post Acquisition Influence, create an Influence when a Campaign Member is created
- Summary

# 1.Heeet Data On Lead in Salesforce

## Heeet Data on Lead in Salesforce, what is an influence?

Heeet is a multitouch cookieless tracking solution.  
An influence is a record showing how many times a prospect interacted with a specific marketing activity.

**USE CASE**  
Imagine John Doe, a prospect who discovered your brand through a podcast, searched for your brand online and came 2 times from 2 different paid campaigns and then finally filled a form after visiting your website from SEO.

This is how the data will look on Salesforce lead.

The screenshot shows a table titled "Heeet Digital Channel Influences (4)" with 4 items, sorted by Date. The table has columns for Acquisition, Influence Type, Influence Source, Campaign, Influence Keyword, Interactions, Acquisition Cost, and Date. Red boxes highlight specific data points, and red arrows point to explanatory text.

Acquisitio...	Influence T...	Influence S...	Campaign	Influence Keyw...	Interactions	Acquisitio...	Date ↑
Pre Acquisition	SEA	Google	Google Ads Heeet Salesfor...	Heeet Campaign Infl...	1	\$16.69	02/01/2024 12:00
Pre Acquisition	SEA	Google	Google Ads Brand	Heeet	1	\$56.38	10/01/2024 12:00
Pre Acquisition	SEO				1	\$0.00	16/01/2024 12:00
Self Reported	Podcast	Podcast			1	\$0.00	16/01/2024 12:00

**Annotations:**

- First Click Influence:** Points to the first row (Google Ads Heeet Salesfor...).
- Intermediary Click Influence:** Points to the second row (Google Ads Brand).
- Last Click Influence:** Points to the third row (SEO).
- Self Reported Attribution through a « How did you hear from us? » field on your form:** Points to the fourth row (Podcast).
- Number of interactions per influences:** Points to the "Interactions" column.
- Acquisition costs based on your connected campaigns data:** Points to the "Acquisition Cost" column.

# 1.Heeet Data On Lead in Salesforce

## Heeet Influence Records Overview

A Heeet Influence record is made of the following field and informations.

- **Date:** when this influence happened. For example if a lead visited your website from a Google Ads campaign on 02/01/2024 then the Influence date will be at that date.
- **Lead / Contact / Account / Opportunity :** Salesforce records this Influence is related to. Influences are automatically added to Account/Contact and Opportunity when a lead is converted.
- **Meeting ID:** an Influence can be automatically created when your sales representative either save a sales meeting with a customer or send them an email.  
More details about this feature later on this presentation ☺

The screenshot displays the Heeet Salesforce interface for a Heeet Digital Channel Influence record. The record ID is HCI-000002462. The interface is divided into several sections:

- Influence Details:** This section is highlighted with a red box and contains the following fields:
  - Heeet Campaign Influence Name: HCI-000002462
  - Date: 02/01/2024 12:00
  - Lead: John Doe
  - Contact: John Doe
  - Account: AITrio
  - Opportunity: AITrio-
  - Meeting ID: (empty)
- Influence Type:** This section contains the following fields:
  - Acquisition Driver: Marketing Driven (checked)
  - Acquisition Type: Pre Acquisition
  - Influence Type: SEA
  - Influence Sub Type: Google
  - Campaign: Google Ads Heeet Salesforce
  - Influence Keyword: Heeet Campaign Influence
  - Interactions: 1
  - First: (checked)
  - Last: (unchecked)
  - Intermediary: (unchecked)
  - Acquisition Costs: \$16.69
- Revenue Influence:** This section contains the following fields:
  - Opportunity Amount: \$10,000.00
  - Revenue Influence: \$1,600

# 1.Heeet Data On Lead in Salesforce

## Heeet Influence Records Overview

- Acquisition Driver: an Influence can either be « Marketing Driven » (if associated to a marketing activity – website visit from SEA, SEO, Social, webinar attendance,...) or « Sales Driven » if created by a sales event or an outbound sales email.
- Acquisition Type: an Influence can either be  
Pre Acquisition: influences which happened before the lead was created in Salesforce  
Post Acquisition: influences is either created when adding a lead/contact to a campaign or if it fills a new form while it already existed in Salesforce  
Self Reported: if you're using Heeet self attribution feature in our Javascript.
- Influence Type: can either be SEA, SEO, Direct, Social Ads, Social Organic for Marketing Driven Influences or Pre Sales Meeting, Outbound Email for Sales Driven Influences.
- Influence Sub Type: can be Google or Bing for SEA influences, LinkedIn or Facebook for Social Influences, Meeting or Email for Sales Driven Influences.
- Campaign: Salesforce Campaign this influence is related to.
- Influence Keyword: keyword the prospect searched for if coming from SEA
- Interactions: number of times a prospect interacted with this exact Influence. For example, if a prospect comes 4 times from SEO, then you'll have 1 SEO influence with 4 interactions

The screenshot shows the Heeet Digital Channel Influence record for HCI-000002462. The record is displayed in a table format with various fields and their values. The 'Influence Type' section is highlighted with a red box. The 'Acquisition Driver' is 'Marketing Driven', 'Acquisition Type' is 'Pre Acquisition', 'Influence Type' is 'SEA', 'Influence Sub Type' is 'Google', 'Campaign' is 'Google Ads Heeet Salesforce', 'Influence Keyword' is 'Heeet Campaign Influence', and 'Interactions' is '1'. The 'Revenue Influence' section shows an Opportunity Amount of \$10,000.00 and a Revenue Influence of \$1,600.

Influence Details	
Heeet Campaign Influence Name	HCI-000002462
Date	02/01/2024 12:00
Lead	John Doe
Contact	John Doe
Account	AITrio
Opportunity	AITrio-
Meeting ID	

Influence Type	
Acquisition Driver	Marketing Driven
Acquisition Type	Pre Acquisition
Influence Type	SEA
Influence Sub Type	Google
Campaign	Google Ads Heeet Salesforce
Influence Keyword	Heeet Campaign Influence
Interactions	1
First	<input checked="" type="checkbox"/>
Last	<input type="checkbox"/>
Intermediary	<input type="checkbox"/>
Acquisition Costs	\$16,69

Revenue Influence	
Opportunity Amount	\$10,000.00
Revenue Influence	\$1,600

# 1.Heeet Data On Lead in Salesforce

## Heeet Influence Records Overview

- **First/Last/Intermediary:** it shows when this influenced happened for Pre Acquisition influences, was it first click, last click or intermediary.
- **Acquisition Costs:** if an Influence is related to a Heeet Generated campaign, Heeet updates Influence costs by using current CPC of this campaign. If an influence is related to a standard Salesforce campaign such as a webinar, Heeet will update Influence costs using Campaign Actual Costs / Leads + Contacts in Campaign
- **Opportunity Amount:** value of the Opportunity related to this Influence, based on Heeet Settings
- **Revenue Influence:** how much this Influence worth based on Opportunity Amount and number of other Influences related to it.

heezet

Heeet Digital Channel Influence  
HCI-000002462

▼ Influence Details

Heeet Campaign Influence Name	HCI-000002462	Account	<a href="#">AITrio</a>
Date	02/01/2024 12:00	Opportunity	<a href="#">AITrio-</a>
Lead	<a href="#">John Doe</a>	Meeting ID	
Contact	<a href="#">John Doe</a>		

▼ Influence Type

Acquisition Driver	Marketing Driven	First	<input checked="" type="checkbox"/>
Acquisition Type	Pre Acquisition	Last	<input type="checkbox"/>
Influence Type	SEA	Intermediary	<input type="checkbox"/>
Influence Sub Type	Google	Acquisition Costs	\$16.69
Campaign	<a href="#">Google Ads Heeet Salesforce</a>		
Influence Keyword	Heeet Campaign Influence		
Interactions	1		

▼ Revenue Influence

Opportunity Amount	\$10,000.00	Revenue Influence	\$1,600
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# 1.Heeet Data On Lead in Salesforce

## Heeet Data on Lead in Salesforce, what is a Content Influence

Heeet Content enables you to specify in our Javascript what website content you'd like to track for each prospect.

For example, if you want to track all your blog articles, then you'll need to update our « tracked content » section in our Javascript by adding /blog.

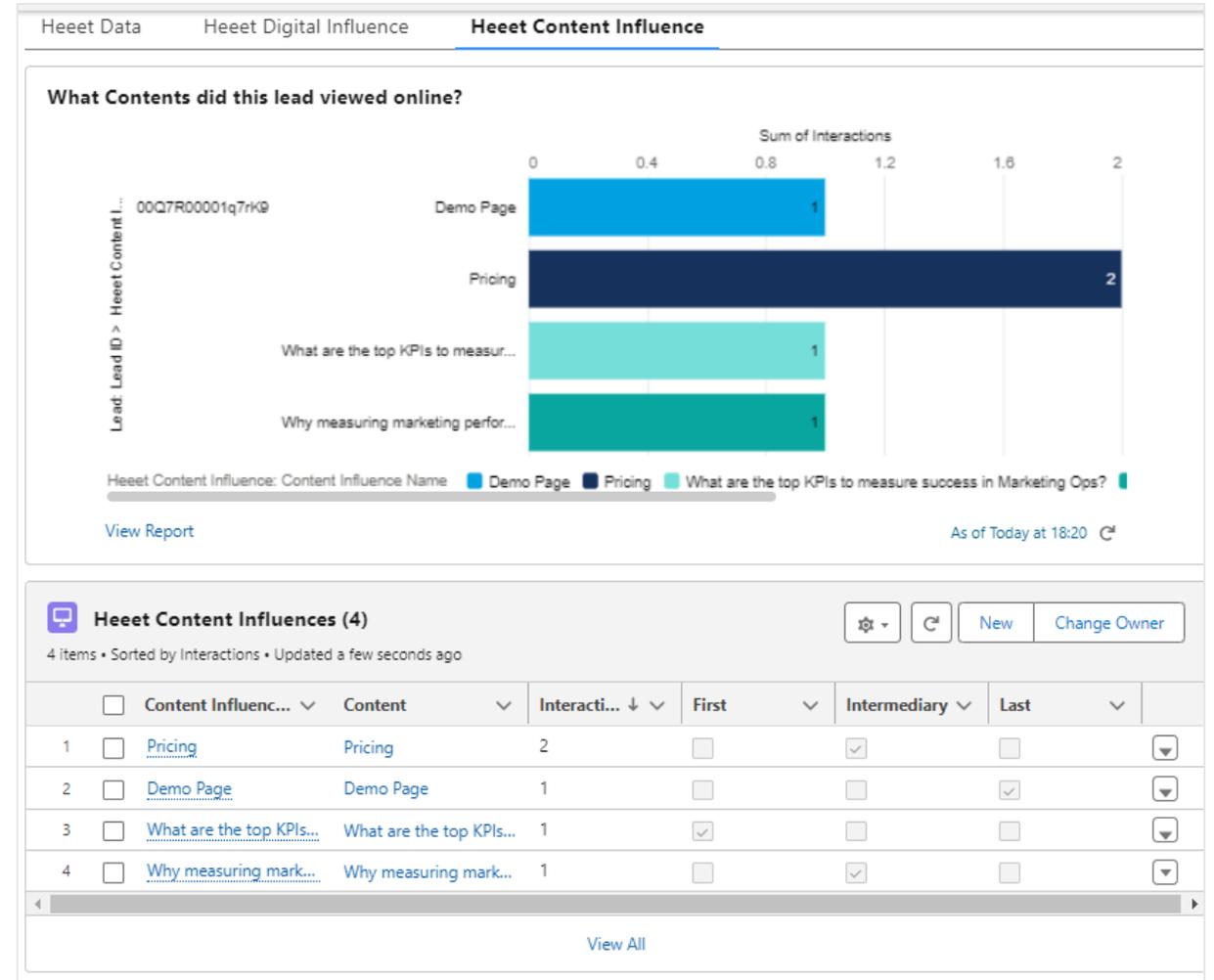
You can add as many « urls » as you want to track but we recommend to focus on high value content.

### USE CASE

John Doe discovered your website coming from a Social Organic post on LinkedIn redirecting to the « What are the top KPIs... » article. He came back on your website, visited the « Why measuring marketing... » articles, the pricing page and the demo page.

Heeet will automatically created one Content Influence per tracked content. If a Content already exists in Salesforce, Influence will be related to this « parent object ». If the Content does not exist, Heeet will create it and associate the Content Influence to it.

You can see at what stage the prospect browsed a specific content, first visit, intermediary visit or last visit before filling a form.



# 1.Heeet Data On Lead in Salesforce

Automatically create campaign member when an influence is created.

You can automatically create Salesforce Campaign Member if an influence is related to a Salesforce Campaign.

To activate this feature, go to Heeet Settings > Campaign.

If you select this option, John Doe will be added as Campaign Member to both campaigns he clicked on.

**Heeet API Key and Settings**

Global Settings

**Attribution Model**

Pre Acquisition Revenue Attribution

Pre/Post/Self Reported Acquisition Revenue Attribution

Opportunity Revenue Attribution

**Campaign**

Automated Campaign and Campaign Member creation

**Automated Campaign and Campaign Member creation**

When a prospect comes from a campaign which does not exist in Salesforce, select if you want to create a new campaign automatically. You can also decide to create campaign member automatically.

- Create Salesforce Campaign if it does not exist
- Create Campaign Member when an influence is created
- Create Influence when a Campaign Member is created

Details Activities **Campaigns** Heeet Data

**Campaign History (2)**

- [Google Ads Heeet Salesforce](#)  
Type: Google Ads
- [Google Ads Brand](#)  
Type: Google Ads

[View All](#)

**Heeet Data** Heeet Digital Influence Heeet Content Influence

**Heeet Digital Channel Influences (4)**  
4 items • Sorted by Date • Updated 15 minutes ago

Acquisitio...	Influence T...	Influence S...	Campaign
Pre Acquisition	SEA	Google	<a href="#">Google Ads Heeet Salesfor...</a>
Pre Acquisition	SEA	Google	<a href="#">Google Ads Brand</a>
Pre Acquisition	SEO		
Self Reported	Podcast	Podcast	

# 1.Heeet Data On Lead in Salesforce

Create Salesforce Campaign if it does not exist.

You can automatically create Salesforce Campaign if it does not exist in Salesforce  
To activate this feature, go to Heeet Settings > Campaign.

## USE CASE

You created a LinkedIn post promoting one of your product and your employees shared it on LinkedIn.  
John Doe clicked on this post during its journey before filling a form on your website.

LinkedIn Post Influence is recorded in Salesforce, « LinkedIn New Product Post »  
Campaign is automatically created in Salesforce and John Doe is added as Campaign Member to it.  
Any lead who interact with this LinkedIn post will then be added to the campaign in the future.

**Heeet API Key and Settings**

Global Settings

**Attribution Model**

- Pre Acquisition Revenue Attribution
- Pre/Post/Self Reported Acquisition Revenue Attribution
- Opportunity Revenue Attribution

**Campaign**

Automated Campaign and Campaign Member creation

**Automated Campaign and Campaign Member creation**

When a prospect comes from a campaign which does not exist in Salesforce, select if you want to create a new campaign automatically. You can also decide to create campaign member automatically.

- Create Salesforce Campaign if it does not exist
- Create Campaign Member when an influence is created
- Create Influence when a Campaign Member is created

Heeet Digital Channel Influences (5)						
5 items • Sorted by Date • Updated a few seconds ago						
	Heeet Campaign I...	Acquisitio...	Influence T...	Influence S...	Campaign	
1	<input type="checkbox"/>	<a href="#">HCI-0000002462</a>	Pre Acquisition	SEA	Google	Google Ads Heeet Salesfor...
2	<input type="checkbox"/>	<a href="#">HCI-0000002466</a>	Pre Acquisition	Social Organic	Linkedin	Linkedin New Product Post
3	<input type="checkbox"/>	<a href="#">HCI-0000002463</a>	Pre Acquisition	SEA	Google	Google Ads Brand
4	<input type="checkbox"/>	<a href="#">HCI-0000002464</a>	Pre Acquisition	SEO		
5	<input type="checkbox"/>	<a href="#">HCI-0000002465</a>	Self Reported	Podcast	Podcast	

**Campaign**  
LinkedIn New Product Post

Campaign: Campaign Name

[View Report](#)

Related **Details** Campaign Members

Heeet Campaign Data

Campaign Name	Linkedin New Product Post	Type	Digital-Other
Campaign Objective		Heeet Generated	<input checked="" type="checkbox"/>

**Campaign**  
LinkedIn New Product Post

**Campaign Members**

Number of Members

1

[View All](#)

# 1.Heeet Data On Lead in Salesforce

## Post Acquisition Influence, create an Influence when a Campaign Member is created

You can automatically create Heeet Influences when you add a lead/contact to a campaign. To activate this feature, go to Heeet Settings > Campaign.

### USE CASE

You add existing lead John Doe to a webinar campaign (A) in Salesforce after it was created in Salesforce. John Doe is added as campaign member (B)

If you activated automated influence creation, Heeet will automatically create an Influence with a specific Acquisition Type being marked as « **Post Acquisition** » since this marketing activity happened **AFTER** the lead was created in Salesforce (C).

This feature only applies for Campaigns that are not created by Heeet (where « Heeet Generated » = false on Campaign).

**Heeet API Key and Settings**

Global Settings

**Attribution Model**

Pre Acquisition Revenue Attribution

Pre/Post/Self Reported Acquisition Revenue Attribution

Opportunity Revenue Attribution

**Campaign**

Automated Campaign and Campaign Member creation

**Automated Campaign and Campaign Member creation**

When a prospect comes from a campaign which does not exist in Salesforce, select if you want to create a new campaign automatically. You can also decide to create campaign member automatically.

- Create Salesforce Campaign if it does not exist
- Create Campaign Member when an influence is created
- Create Influence when a Campaign Member is created

**Choose a Campaign**

\* Campaign

Webinar New Feature Heeet

Cancel Next

**Campaigns**

**Campaign History (3 +)**

- LinkedIn New Product Post  
Type: Digital-Other
- Webinar New Feature Heeet**  
Type: Webinar
- Google Ads Heeet Salesforce  
Type: Google Ads

View All

**Heeet Data**

Heeet Digital Influence

Heeet Content Influence

**Heeet Digital Channel Influences (6)**

6 items • Sorted by Date • Updated a few seconds ago

	Heeet Campaign I...	Acquisitio...	Influence T...	Influence S...	Campaign	In
1	<input type="checkbox"/> HCI-0000002462	Pre Acquisition	SEA	Google	Google Ads Heeet Salesfor...	He
2	<input type="checkbox"/> HCI-0000002466	Pre Acquisition	Social Organic	LinkedIn	LinkedIn New Product Post	He
3	<input type="checkbox"/> HCI-0000002463	Pre Acquisition	SEA	Google	Google Ads Brand	He
4	<input type="checkbox"/> HCI-0000002464	Pre Acquisition	SEO			
5	<input type="checkbox"/> HCI-0000002465	Self Reported	Podcast	Podcast		
6	<input checked="" type="checkbox"/> HCI-0000002471	Post Acquisition	Webinar	Webinar	Webinar New Feature Heeet	

# 1.Heeet Data On Lead in Salesforce

## Summary

Time between first and last visit

Lead detailed acquisition costs

The screenshot displays the Heeet interface for a lead named John Doe. The top navigation bar includes the Heeet logo, a search bar, and various menu items like Settings, Leads, Accounts, Contacts, Opportunities, Campaigns, Campaign Snapshots, Heeet Digital Channel Influences, Dashboards, Reports, Campaigns Simulation, and More. The lead profile header shows 'Lead John Doe' with buttons for Clone, Delete, Edit, and Convert. Below this, a progress bar indicates the lead's status: Open - Not Contacted, Working - Contacted, Closed - Not Converted, and Converted. The main content area is divided into two sections: 'Heeet Analytics - First & Last Click Data' and 'Heeet Digital Channel Influences (6)'. The 'Heeet Analytics' section lists various metrics such as landing URLs, channels, referrers, and campaign details. The 'Heeet Digital Channel Influences' section is a table with columns for Campaign, Acquisition, Influence Type, Source, Campaign Name, Influence Keyword, Interactions, and Acquisition Cost. Red boxes and arrows highlight the 'Heeet First Visit > Form (# days)' field (13,96) and the 'Heeet Lead Acquisition Costs' field (\$141.25) in the lead profile header. Another red box highlights the 'Heeet Analytics - First & Last Click Data' section, and a third red box highlights the 'Heeet Digital Channel Influences (6)' table.

Heeet allows you to get a complete overview of all marketing data related to this lead.

First & Last Click Acquisition Data (Lead Custom Fields added by the Heeet package)

Heeet Influences

# INTRODUCTION TO HEEET DATA ON SALESFORCE OPPORTUNITIES

- Heeet Data Overview on Opportunity from lead mapping
- Create a Revenue Attribution Model
- Revenue Attribution on Opportunity Example

# 1.Heeet Data On Opportunity in Salesforce

## Record Overview from lead mapping

When a lead is converted into an opportunity, account and contact, all Heeet influences are automatically linked to newly converted records. Make also sure that you map all Heeet custom fields between lead and opportunity.

The screenshot displays the Salesforce CRM interface for an Opportunity record. The top navigation bar includes the Heeet logo, a search bar, and various menu items like Settings, Leads, Accounts, Contacts, Opportunities, Campaigns, Campaign Snapshots, Heeet Digital Channel Influences, Dashboards, and More. The Opportunity record is for 'AlTrio' with an amount of \$10,000.00. A red box highlights the 'Heeet Lead Acquisition Costs' field, which is \$141.25. Below the record details is a stage progression bar with stages: Prospecting, Qualification, Needs Analysis, Value Proposition, Id. Decision Ma..., Perception Anal..., Proposal/Price..., Negotiation/Re..., and Closed. The 'Details' tab is active, showing an 'Opportunity Summary' section with 'Heeet Online Insights' expanded. This section contains a list of Heeet custom fields for first and last clicks, including landing URLs, datetimes, channels, referrers, campaign names, adgroups, and sources. A red box highlights this entire section. To the right, the 'Influence Details' tab is active, showing a table of 'Heeet Digital Channel Influences (6)'. The table has columns for Heeet Campaign Infl..., Acquisit..., Influence T..., Influence S..., Campaign, and Acquisitio... The table lists six items with their respective acquisition types, channels, and costs. A red box highlights this table. A red arrow points from the 'Heeet Lead Acquisition Costs' field to the 'Heeet Digital Channel Influences' table, indicating the relationship between the two.

Heeet Campaign Infl...	Acquisit...	Influence T...	Influence S...	Campaign	Acquisitio...
<input type="checkbox"/> HCI-0000002462	Pre Acquisition	SEA	Google	Google Ads Heeet Salesforce	\$16.69
<input type="checkbox"/> HCI-0000002463	Pre Acquisition	SEA	Google	Google Ads Brand	\$56.38
<input type="checkbox"/> HCI-0000002464	Pre Acquisition	SEO			\$0.00
<input type="checkbox"/> HCI-0000002466	Pre Acquisition	Social Organic	Linkedin	Linkedin New Product Post	
<input type="checkbox"/> HCI-0000002471	Post Acquisition	Webinar	Webinar	Webinar New Feature Heeet	\$68.18
<input type="checkbox"/> HCI-0000002465	Self Reported	Podcast	Podcast		\$0.00



# 1.Heeet Data On Opportunity in Salesforce

## Create a Revenue Attribution Model

Heeet allows you to customize your own attribution models directly in the Heeet settings.

### Pre Acquisition Revenue Attribution (A)

You can split Opportunity value between related « Pre Acquisition » influences depending if they're a first, intermediary or last click.

### Pre/Post/Self Reported Revenue Attribution (B)

You can also define a specific revenue attribution model based on Acquisition Type.

Example: Pre Acquisition will get 40% of the revenue, Post Acquisition 20% and Self Reported 40%

**A**

#### Heeet API Key and Settings

Global Settings

#### Attribution Model

**Pre Acquisition Revenue Attribution**

Pre/Post/Self Reported Acquisition Revenue Attribution

Opportunity Revenue Attribution

#### Campaign

Automated Campaign and Campaign Member creation

Snapshot Type

#### Pre Acquisition Revenue Attribution

Set a % of how each interactions should influence

*Example, you set first attribution to 25%, intermediary associated (First: SEO, Intermediary: SEA-Campaign, Direct:5000€*

First Attribution (%)

Intermediary Attribution (%)

Last Attribution (%)

**B**

#### Heeet API Key and Settings

Global Settings

#### Attribution Model

Pre Acquisition Revenue Attribution

**Pre/Post/Self Reported Acquisition Revenue Attribution**

Opportunity Revenue Attribution

#### Campaign

Automated Campaign and Campaign Member creation

Snapshot Type

#### Pre/Post/Self Reported Acquisition Revenue Attribution

Define your own attribution model between pre and post acquisition influence

*Example, if you assign 50% to each your opportunity revenue will be split equally and all marketing influences which happened after.*

Pre Acquisition (%)

Post Acquisition (%)

Self Reported Acquisition (%)

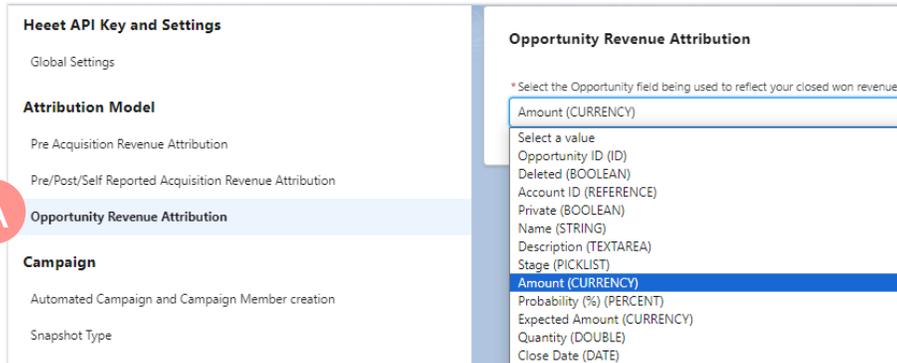
# 1.Heeet Data On Opportunity in Salesforce

## Create a Revenue Attribution Model

All Influences are updated when your « target » Opportunity field is changed.

You can set what field should be used to calculate Revenue Influence on Influence records in Heeet settings. For example, if you do not use the standard « Amount » field but a custom field, select this field instead as « Target Field » (A).

You'll be able to see directly on the Influence record how much revenue it influenced for a specific opportunity (B).



The screenshot shows the Heeet API Key and Settings interface. On the left, the 'Opportunity Revenue Attribution' section is highlighted with a red circle labeled 'A'. On the right, the 'Opportunity Revenue Attribution' dropdown menu is open, showing a list of fields. The 'Amount (CURRENCY)' field is selected and highlighted with a blue bar.

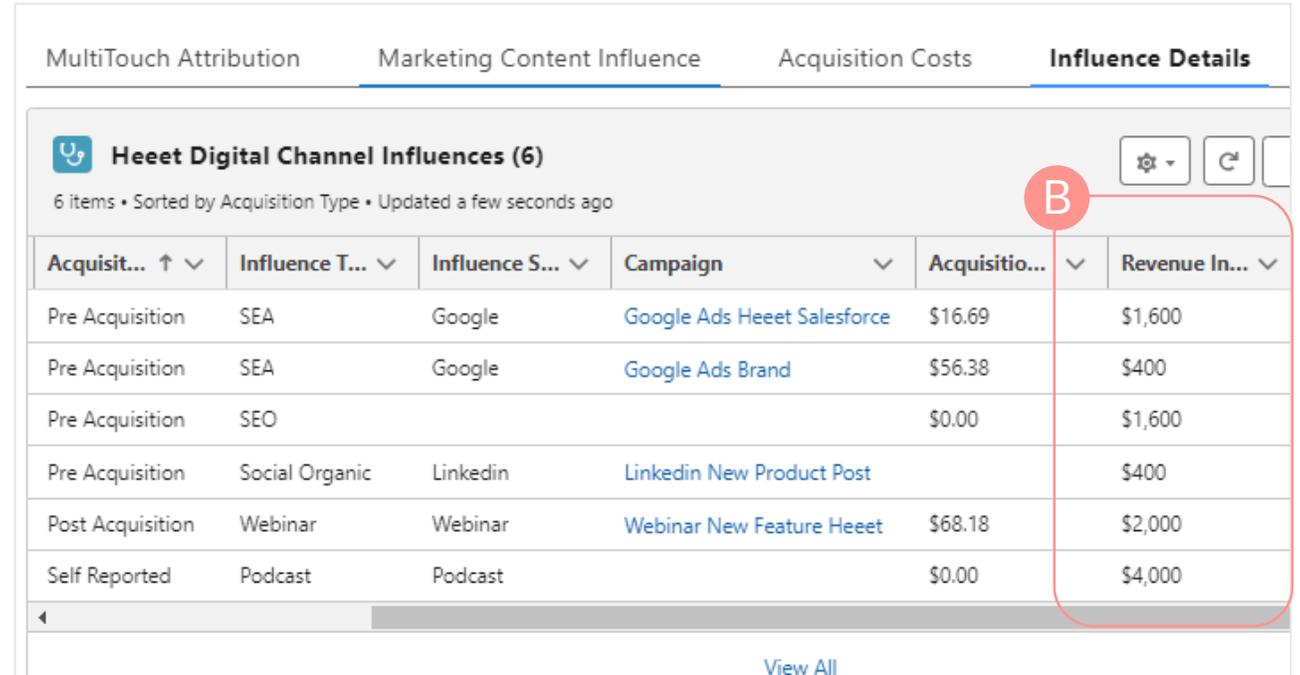
**Heeet API Key and Settings**

- Global Settings
- Attribution Model**
  - Pre Acquisition Revenue Attribution
  - Pre/Post/Self Reported Acquisition Revenue Attribution
  - Opportunity Revenue Attribution**
- Campaign**
  - Automated Campaign and Campaign Member creation
  - Snapshot Type

**Opportunity Revenue Attribution**

\*Select the Opportunity field being used to reflect your closed won revenue.

- Amount (CURRENCY)
- Select a value
- Opportunity ID (ID)
- Deleted (BOOLEAN)
- Account ID (REFERENCE)
- Private (BOOLEAN)
- Name (STRING)
- Description (TEXTAREA)
- Stage (PICKLIST)
- Amount (CURRENCY)**
- Probability (%) (PERCENT)
- Expected Amount (CURRENCY)
- Quantity (DOUBLE)
- Close Date (DATE)



The screenshot shows the Heeet Digital Channel Influences table. The table is titled 'Heeet Digital Channel Influences (6)' and is sorted by Acquisition Type. A red circle labeled 'B' highlights the 'Revenue In...' column, which shows the revenue attributed to each influence record.

Acquisit...	Influence T...	Influence S...	Campaign	Acquisitio...	Revenue In...
Pre Acquisition	SEA	Google	Google Ads Heeet Salesforce	\$16.69	\$1,600
Pre Acquisition	SEA	Google	Google Ads Brand	\$56.38	\$400
Pre Acquisition	SEO			\$0.00	\$1,600
Pre Acquisition	Social Organic	Linkedin	Linkedin New Product Post		\$400
Post Acquisition	Webinar	Webinar	Webinar New Feature Heeet	\$68.18	\$2,000
Self Reported	Podcast	Podcast		\$0.00	\$4,000

View All

# 1.Heeet Data On Opportunity in Salesforce

## Revenue Attribution on Opportunity Example

In our John Doe example with a 10000\$ Opportunity and based on the following split, you'll be able to report on the following revenue influences.

Pre Acquisition (%)
40
Post Acquisition (%)
20
Self Reported Acquisition (%)
40

Pre Acquisition:  $10000 \times 40\% = 4000\$$  Influence  
 Post Acquisition:  $10000 \times 20\% = 2000\$$  Influence  
 Self Reported:  $10000 \times 40\% = 4000\$$  Influence

First Attribution (%)
40
Intermediary Attribution (%)
20
Last Attribution (%)
40

### SEA

First Click SEA ( $40\% \times 40\% \times 10000$ ) + Intermediary SEA ( $20\% \times 40\% \times 50\% \times 10000$ ) =  $1600+400 = 2000\$$  Influence

### Social Organic

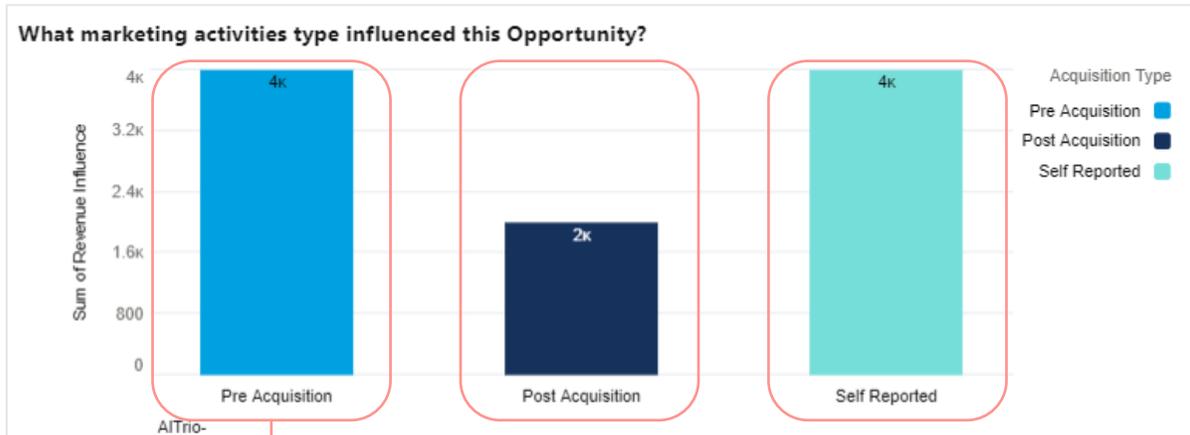
1 Intermediary click ( $20\% \times 40\% \times 50\% \times 10000$ ) =  $400\$$  Influence

### SEO

Last Click ( $40\% \times 40\% \times 10000$ ) =  $1600\$$  Influence

Post Acquisition Webinar  $20\% \times 10000 = 2000\$$  Influence

Self Reported Podcast =  $40\% \times 10000 = 4000\$$  Influence



# INTRODUCTION TO HEEET DATA ON SALESFORCE CAMPAIGNS

- Heeet Data Overview on Salesforce Campaigns

# 1.Heeet Data On Campaign in Salesforce

## Overview

When you connect your different paid platforms with Salesforce using Heeet, the following actions will happen.

- Your active paid platforms campaigns will be created as standard Salesforce Campaigns
- Your active paid platforms campaigns will be updated every hour

When a campaign is created by Heeet, you will see the « Heeet Generated » checkbox marked. Heeet also marks as « Heeet Generated » the campaigns created automatically when they dont exist in Salesforce.

Heeet also automatically updates Campaign Type standard field depending on platform (GoogleAds, BingAds, FacebookAds, LinkedInAds, TikTokAds)

Every hour, Heeet will update the following fields

- Actual Costs (current costs since start date in Heeet settings)
- Impressions (number of impressions since campaign start date in Heeet settings)
- Clicks (number of clicks since campaign start date in Heeet settings)
- Daily Budget (current campaign Daily Budget)
- Average CPC (current campaign CPC)

Finally, the following fields are calculated based on Heeet influences records related to it.

- Leads in Campaigns: number of leads who have been exposed to this campaign Clicks (number of clicks since campaign start date in Heeet settings)
- Converted Leads in Campaigns: number of leads who have been exposed to this campaign.
- Heeet Closed Won Revenue Influence: how much revenue is coming from closed won opportunities
- Heeet Campaign Influence ROI: difference between Actual Costs and Closed Won Revenue Influence
- Heeet Pipeline Revenue Influence: how much pipeline has been generated by this campaign.

The screenshot displays the Heeet interface within a Salesforce environment. At the top, the Heeet logo is visible on the left, and a search bar is on the right. Below the logo, there are navigation tabs: Heeet, Settings, Leads, Accounts, Contacts, Opportunities, and Campaigns. The main content area shows a campaign titled 'Google Ads Heeet Salesforce'. Underneath, there are three tabs: Related, Details (which is active), and Campaign Members. The Details tab is divided into two sections: 'Heeet Campaign Data' and 'Heeet Campaign Stats'. The 'Heeet Campaign Data' section includes fields for Campaign Name (Google Ads Heeet Salesforce), Campaign Objective (Lead Generation), and Campaign Type (Google Ads). The 'Heeet Campaign Stats' section includes fields for Heeet Impressions (14,582), Heeet Clicks (1,950), Leads in Campaign (3), Converted Leads in Campaign (3), Contacts in Campaign (3), Actual Cost in Campaign (\$32,540), Daily Budget (\$35), Average CPC (\$16.68), Heeet Closed Won Revenue Influence (\$227,801), Heeet Campaign Influence ROI (\$195,261.32), and Heeet Pipeline Revenue Influence (\$469,703.29). Each field has a small edit icon next to it.

Heeet Campaign Data	
Campaign Name	Type
Google Ads Heeet Salesforce	Google Ads
Campaign Objective	Heeet Generated
Lead Generation	<input checked="" type="checkbox"/>

Heeet Campaign Stats	
Heeet Impressions	Actual Cost in Campaign
14 582	\$32,540
Heeet Clicks	Daily Budget
1 950	\$35
Leads in Campaign	Average CPC
3	\$16.68
Converted Leads in Campaign	Heeet Closed Won Revenue Influence
3	\$227,801
Contacts in Campaign	Heeet Campaign Influence ROI
3	\$195,261.32
	Heeet Pipeline Revenue Influence
	\$469,703.29

# INTRODUCTION TO HEEET DATA ON SALESFORCE CAMPAIGN SNAPSHOTS

- What is a Campaign Snapshot?
- Heeet Data Overview on Salesforce Snapshots

# 1.Heeet Data On Salesforce Campaign Snapshots

## What is a Campaign Snapshot?

We all know that Salesforce lacks of historical data, that's why Heeet is storing « snapshot » of each campaigns generated by Heeet.

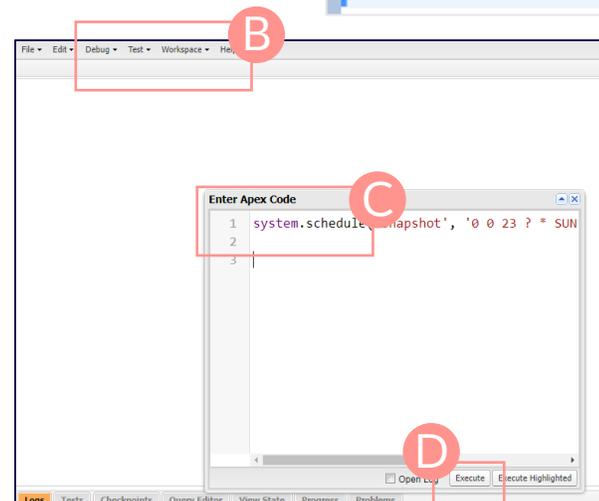
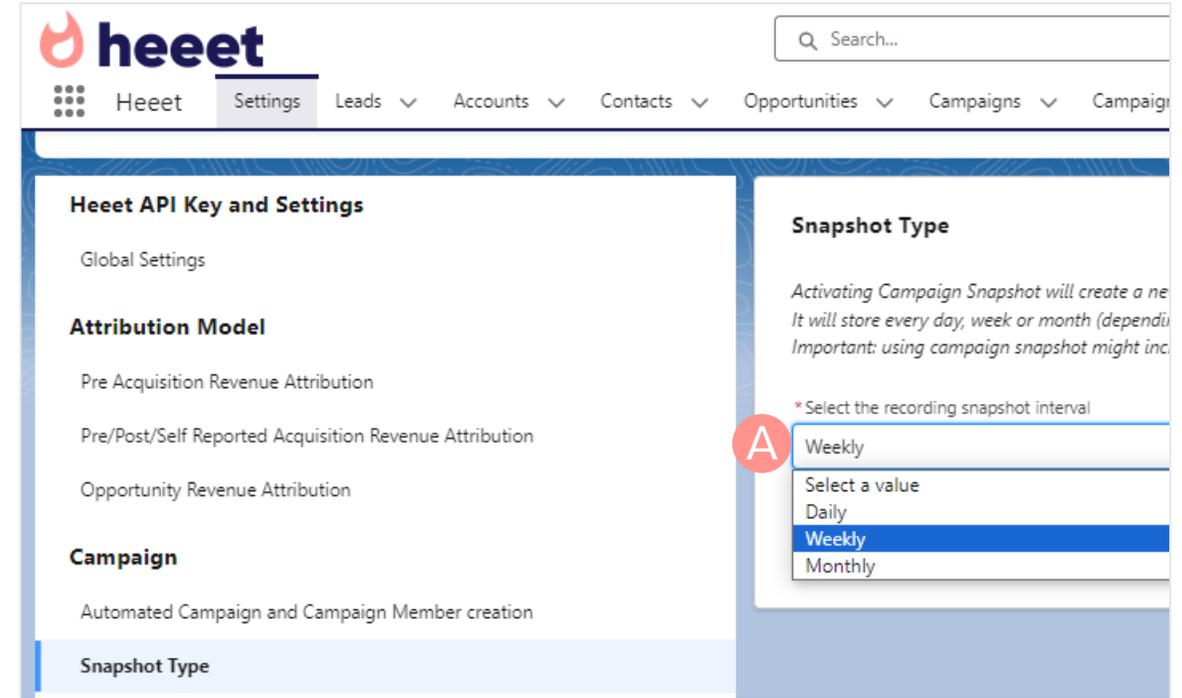
You can set how frequently you want to store campaign snapshot by going to Heeet Settings and choosing between daily, weekly or monthly (A).

In order to reduce data storage in Salesforce, we recommend you to use the « Monthly » option.

Once a frequency selected, ask a Salesforce admin to open the developer console > Debug > Open Execute Anonymous Window (B)

Then paste the following code into the window (C) and click on Execute (D)

```
system.schedule('Snapshot', '0 0 23 ? * SUN *', new Heeet.Heeet_SnapshotScheduler());
```



# 1.Heet Data On Salesforce Campaign Snapshots

## Record Overview

Campaign Snapshot automatically stores the following values:

- Campaign its related to
- Snapshot Date
- Aggregated Campaign Cost since sync start date
- Aggregated Campaign Revenue Influence since sync start date
  
- Aggregated # of influenced leads, # of influenced converted leads, # of opportunities and # of closed won opportunities
- Aggregated Impressions, Clicks, Current Daily Budget and current CPC
  
- Previous snaphot values (costs, revenue, leads, converted leads, opportunities and converted opportunities)
  
- Period Costs (difference between previous snaphost costs and current costs)
- Period Revenue Influence (difference between previous snapshot revenue influence and current snapshot value)

The following fields have not been added to the package yet but can be calculated using existing fields.

- Period # of leads
- Period # of converted leads
- Period # of opportunities
- Period # of closed won opportunities

heet

Search...

Heet Settings Leads Accounts Contacts Opportunities Campaigns Campaign Snapshots Heet Digital Ch

Campaign Snapshot Q2-2023

Snapshot Overview

Campaign Snapshot Name	Q2-2023	Aggregated Campaign Cost	\$2,500
Campaign	<a href="#">SEO</a>	Aggregated Campaign Revenue Influence	\$1,100
Snapshot Date	14/06/2023		

Campaign Performance

# of leads	Impressions
# of converted leads	Clicks
# of opportunities	Daily Budget
# of closed won opportunities	cpc

Previous Period Costs

Previous Period Costs	\$1,500	Period Costs	\$1,000.00
Previous Period Revenue Influence	\$750	Period Revenue Influence	\$350.00

Previous Period # of leads

Previous Period # of converted leads

Pipeline Revenue Influence

Previous Pipeline Revenue Influence

\$0

# INTRODUCTION TO HEEET SALES ACQUISITION COSTS FEATURE

- What are Sales Costs and how to set them up
- Activate Sales Costs Heeet Flows
- Meeting Costs Example
- Outbound Email Example

# 1.Introduction to Heeet Sales Costs Feature

## What are Sales Costs and how to set them up

It's rare that a prospect converts into a closed won opportunity without having been contacted by a Sales Representative.

Heeet allows you to track 2 types of Sales Representative activities.

- Pre Sales Meetings: every time a meeting is related to a lead or an opportunity,
- Emails: every time an outbound email is sent

Heeet will automatically create an Influence of type « Sales Driven » (versus other « Marketing Driven » influences).

To configure Sales Acquisition Costs, go to Heeet settings > Meeting/Email Costs Calculation and fill in:

- Average Sales Hourly Salary (B): Heeet will use this value to calculate how much the meetings costs were
- Average Outbound Email Time (C): Heeet will use the average time it takes for your sales team to write and send email multiplied by the Average Hourly Salary.

The screenshot shows the Heeet Settings page with the 'Meeting/Email Costs Calculation' section highlighted. The page is divided into two columns. The left column contains sections for 'Heeet API Key and Settings', 'Attribution Model', 'Campaign', 'Sales Acquisition Costs', and 'Integrations'. The right column contains 'Meetings Costs Calculation' and 'Email Costs Calculation'. In the 'Sales Acquisition Costs' section, the 'Meeting/Email Costs Calculation' option is selected and highlighted in blue, with a red circle 'A' next to it. In the 'Meetings Costs Calculation' section, the 'Average Sales Hourly Salary' field is set to 100, with a red circle 'B' next to it. In the 'Email Costs Calculation' section, the 'Average Outbound Email Time' field is set to 20, with a red circle 'C' next to it.

**Heeet** Search... [Icons]

Heeet Settings Leads Accounts Contacts Opportunities Campaigns Campaign Snapshots More

### Heeet API Key and Settings

Global Settings

### Attribution Model

Pre Acquisition Revenue Attribution  
Pre/Post/Self Reported Acquisition Revenue Attribution  
Opportunity Revenue Attribution

### Campaign

Automated Campaign and Campaign Member creation  
Snapshot Type

### Sales Acquisition Costs **A**

**Meeting/Email Costs Calculation**

### Integrations

Audience Triggers  
Google Analytics 7  
Google Ads 1

### Meetings Costs Calculation

This feature enables you to calculate how much you spend on meetings to provide you with an accurate view of your lead acquisition costs. Heeet monitors 2 type of meetings costs:

Pre Customer Acquisition: to calculate how much you spent to acquire a customer  
Post Customer Acquisition: to understand how much you spend in meeting to "retain" a customer

1-To activate this feature, put the average hourly sales salary (sales, pre sales and CS users) in the field below  
2-Go to Salesforce Flows and activate the following flows -> Meeting Flow - On Create -> Meeting Flow - On Update

\* Average Sales Hourly Salary  
100 **B**

### Email Costs Calculation

If it takes an average 20 minutes to draft, write and send email, please put 20 in the field below. Then, each time an outbound email is sent, Heeet will automatically calculate "Email Costs" based on this input and average hourly sales salary.

\* Average Outbound Email Time  
20 **C**

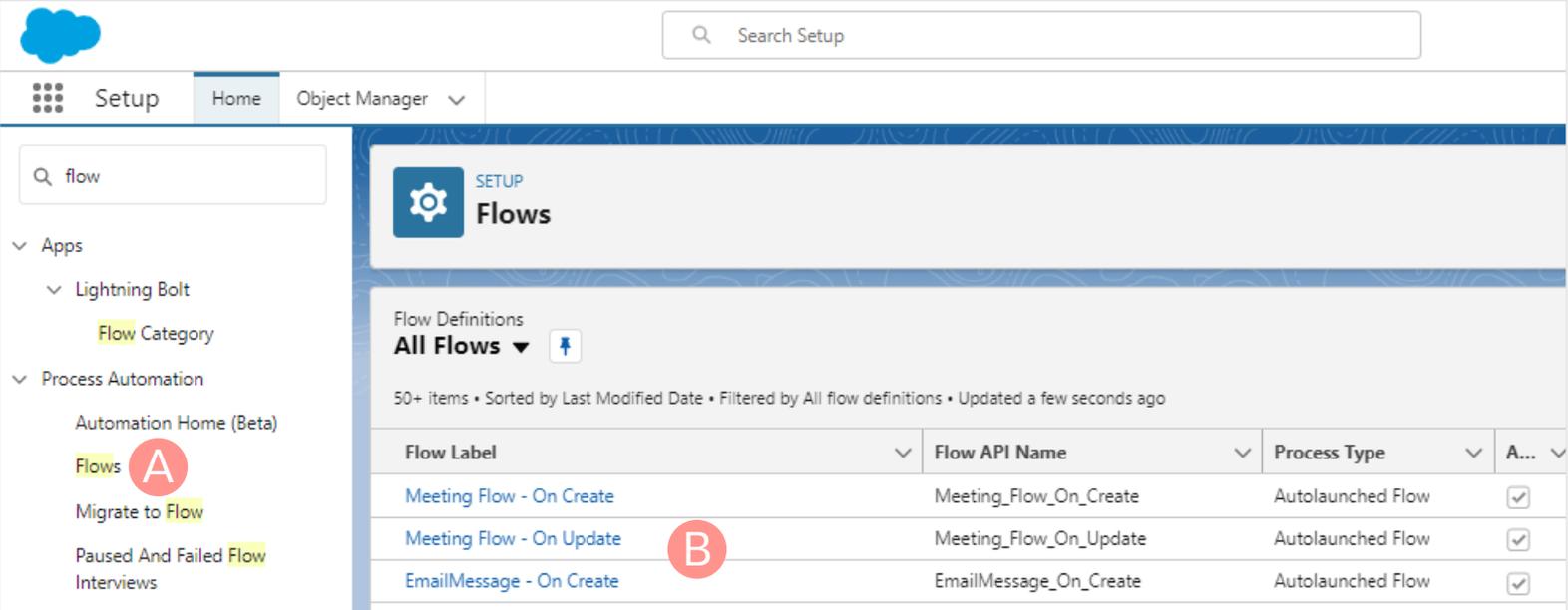
# 1.Introduction to Heeet Sales Costs Feature

## Activate Sales Costs Heeet Flows

Once you set up Average Sales Hourly Salary and Average Outbound Email Time, ask a Salesforce Admin to go to Salesforce > Set Up > Flows (A)

Then activate the following flows (B)

- Meeting Flow - On Create: calculate meeting costs, update acquisition costs on lead or opportunity depending to what object event is related and create an Influence,
- Meeting Flow - On Update: update an existing meeting costs and related Influence,
- ErrorMessage – On Create: calculate email costs, update acquisition costs on lead or opportunity depending to what object email is related and create an Influence.



The screenshot shows the Salesforce Setup interface for Flows. The left sidebar contains a search bar with 'flow' and a navigation menu with categories: Apps, Lightning Bolt (Flow Category), and Process Automation (Automation Home (Beta), Flows (A), Migrate to Flow, Paused And Failed Flow Interviews). The main content area displays 'SETUP Flows' with a 'Flow Definitions' section set to 'All Flows'. Below this is a table of flow definitions.

Flow Label	Flow API Name	Process Type	A...
Meeting Flow - On Create	Meeting_Flow_On_Create	Autolaunched Flow	<input checked="" type="checkbox"/>
Meeting Flow - On Update	Meeting_Flow_On_Update	Autolaunched Flow	<input checked="" type="checkbox"/>
ErrorMessage - On Create	EmailMessage_On_Create	Autolaunched Flow	<input checked="" type="checkbox"/>

# 1. Introduction to Heeet Sales Costs Feature

## Meeting Costs Example

An event is added to the opportunity.

The screenshot shows the Heeet CRM interface for an opportunity named 'AITrio-'. The account name is 'AITrio' with an amount of \$10,000.00. The Heeet Lead Acquisition Costs are \$141.25. The first website visit to conversion is 89,00. The Heeet first click channel is SEA, and the Heeet last click channel is SEO. The opportunity is in the 'Prospecting' stage. The 'MultiTouch Attribution' chart shows the 'Sum of Revenue Influence' for 'Pre Acquisition' and 'Post Acquisition'. The 'Pre Acquisition' bar is at approximately 3.2k, and the 'Post Acquisition' bar is at approximately 4k. A modal window is open for adding a 'Pre Sales Meeting' event, with the subject 'Pre Sales Meeting' and the attendee 'Romain Blanc'. The 'Meeting Costs' field is set to '---None--'.

Lead Acquisition costs and a « Pre Sales Meeting » Influence is created with related costs.

The screenshot shows the Heeet CRM interface for the same opportunity. The Heeet Lead Acquisition Costs are now \$241.25. The 'Heeet Digital Channel Influences' table is displayed, showing 7 items. A red box highlights the 'Pre Sales Meeting' influence with a cost of \$100.00. A red arrow points from the 'Pre Sales Meeting' event in the previous screenshot to this table entry.

Acquisiti...	Influence T...	Influence S...	Campaign	Acquisiti...
Pre Acquisition	SEA	Google	Google Ads Heeet Salesforce	\$16.69
Pre Acquisition	SEA	Google	Google Ads Brand	\$56.38
Pre Acquisition	SEO			\$0.00
Pre Acquisition	Social Organic	Linkedin	Linkedin New Product Post	

# 1.Introduction to Heeet Sales Costs Feature

## Meeting Costs Example

Event is updated with its costs and its type (Internal if only internal users are attending, External if a customer is invited)

The screenshot shows the 'Pre Sales Meeting' event details in the Heeet CRM. The event is assigned to Romain Blanc. The meeting costs are \$100, and the meeting type is 'Internal'. A red box highlights the 'Meeting Costs' and 'Heeet Meeting Type' fields.

Meeting Costs	Heeet Meeting Type
\$100	Internal

With the Heeet Sales Costs Features you'll also be able to build Meeting Costs reports based on Salesforce Events?

The screenshot shows the 'Heeet Meeting Reports' dashboard. It displays a bar chart of meeting costs by date and assigned user, along with a summary table. A red box highlights the chart and table area.

Date	Assigned	Heeet Meeting Type	Company / Account	Meeting Costs
August 2023 (4)	Romain Blanc (4)	- (4)	-	-
			TEST EVENT	\$325
			TEST EVENT	\$725
			Subtotal	\$1,050
			Subtotal	\$1,050



# 1. Introduction to Heeet Sales Costs Feature

## Outbound Email Example

An event is added to the opportunity.

Opportunity **AlTrio-**

Account Name: AlTrio | Amount: \$10,000.00 | Heeet Lead Acquisition Costs: \$241.25 | First Website Visit > Conversion: 89,00 | Heeet First Click Channel: SEA | Heeet Last Click Channel: SEO

Prospecting | Qualificati... | Needs An... | Value Pro... | Id. Decisio... | Perceptio... | Proposal/... | Negotiati... | Closed

MultiTouch Attribution | Marketing Content Influence | **Influence Details** | More

**Heeet Digital Channel Influences (7)**  
7 items • Sorted by Acquisition Type • Updated 11 y a 3 minutes

Acquisiti...	Influence T...	Influence S...	Campaign	Acquisitio...	Rev
Pre Acquisition	SEA	SEA			
Pre Acquisition	SEA	SEA			
Pre Acquisition	SEO	SEA			
Pre Acquisition	Social Organic	SEA			
Post Acquisition	Webinar	SEA			
Self Reported	Podcast	SEA			

Summary

From: Romain Blanc <romain.blanc@uklid.io>  
To: romainblnc+17012024@gmail.com X  
Subject: Summary

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http://www.salesforce.com/

Lead Acquisition costs and a « Pre Sales Meeting » Influence is created with related costs.

Opportunity **AlTrio-**

Account Name: AlTrio | Amount: \$10,000.00 | Heeet Lead Acquisition Costs: \$261.25 | First Website Visit > Conversion: 89,00 | Heeet First Click Channel: SEA | Heeet Last Click Channel: SEO

Prospecting | Qualificati... | Needs An... | Value Pro... | Id. Decisio... | Perceptio... | Proposal/... | Negotiati... | Closed

MultiTouch Attribution | **Influence Details** | More

**Heeet Digital Channel Influences (8)**  
8 items • Sorted by Acquisition Type • Updated a few seconds ago

Acquisiti...	Influence T...	Influence S...	Campaign	Acquisitio...	Revenue In.
Pre Acquisition	SEA	SEA			
Pre Acquisition	SEA	SEA			
Pre Acquisition	SEO	SEA			
Pre Acquisition	Social Organic	SEA			
Post Acquisition	Webinar	SEA			
Self Reported	Podcast	SEA			
Pre Sales Meeting	Meeting	Meeting			\$100.00
Outbound Email	Outbound Email	Outbound Email			\$20.00
Acquisition	SEA	Google	Google Ads Heeet Salesforce	\$16.69	\$1,600
Acquisition	SEA	Google	Google Ads Brand	\$56.38	\$400
Acquisition	SEO			\$0.00	\$1,600

Summary

From: Romain Blanc <romain.blanc@uklid.io>  
To: romainblnc+17012024@gmail.com X  
Subject: Summary

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http://www.salesforce.com/

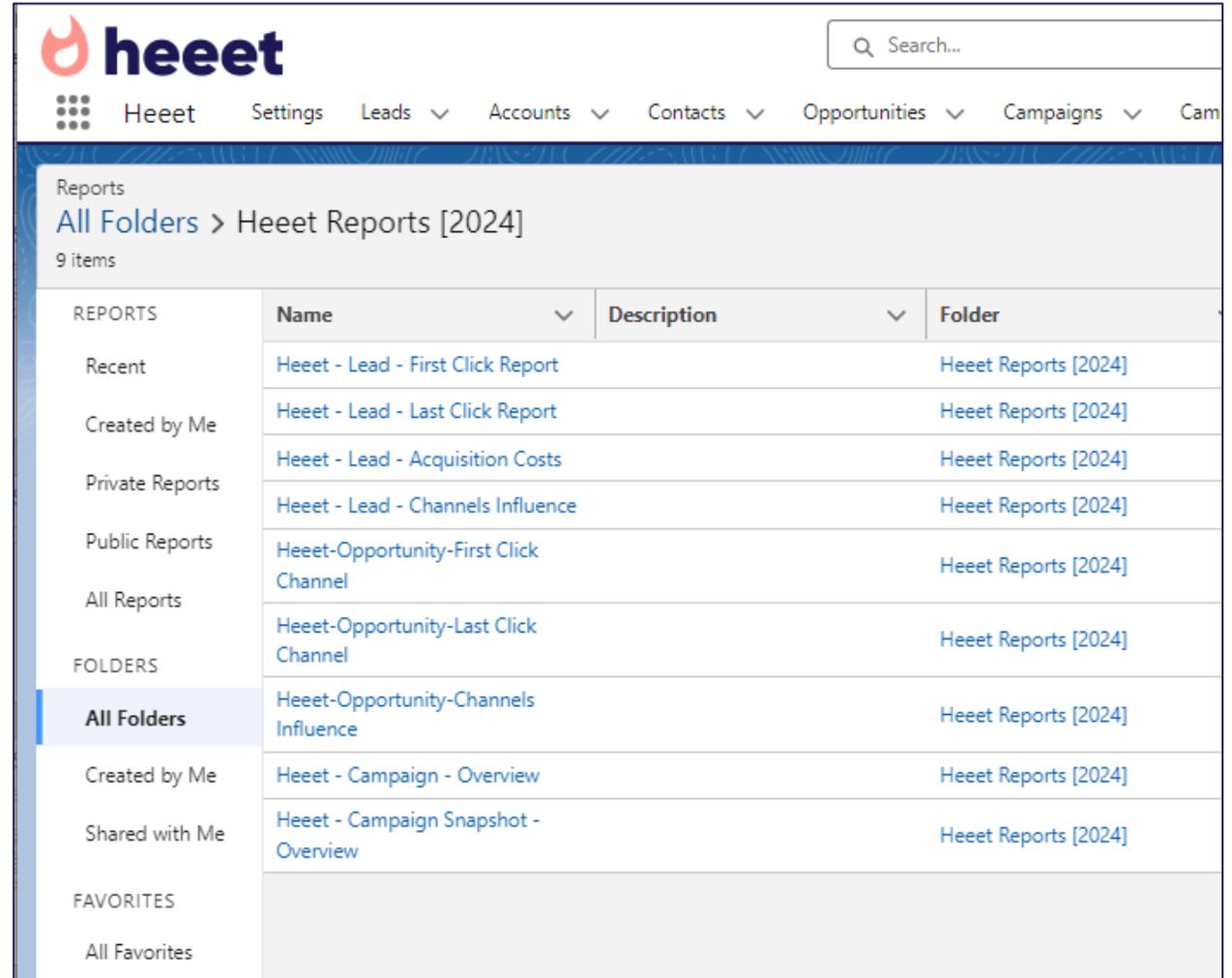
## DEFAULT SALESFORCE REPORTS

- Where to find Reports in Salesforce
- Lead Reports - Heeet - Lead - First Click Report
- Lead Reports - Heeet - Lead - Last Click Report
- Lead Reports - Heeet - Lead - Acquisition Costs
- Lead Reports - Heeet - Lead - Channels Influence
- Opportunity Reports - Heeet-Opportunity-First Click Channel
- Opportunity Reports - Heeet-Opportunity-Last Click Channel
- Opportunity Reports - Heeet-Opportunity-Channels Influence
- Campaign Report – Heeet-Campaign-Overview
- Campaign Snapshot Report – Heeet-Campaign-Overview

# Default Reports

Heeet comes with different pre built reports for each objects.

Go to Reports > All Folders > Heeet Reports [2024]



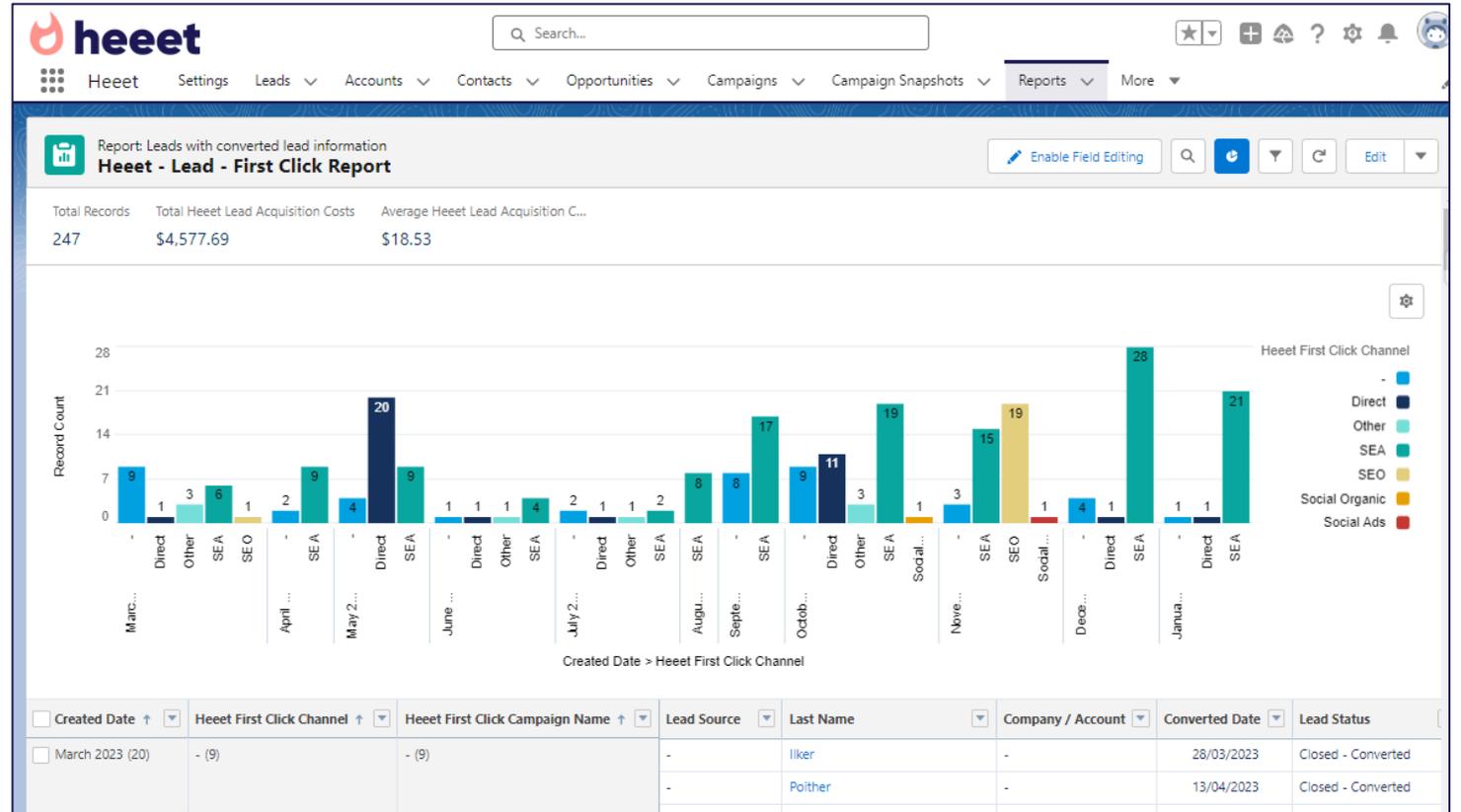
The screenshot displays the Heeet application interface. At the top, there is a navigation bar with the Heeet logo, a search bar, and menu items for Heeet, Settings, Leads, Accounts, Contacts, Opportunities, and Campaigns. Below the navigation bar, the main content area shows the 'Reports' section, specifically 'All Folders > Heeet Reports [2024]' with 9 items listed. The items are organized into categories: RECENT, CREATED BY ME, PRIVATE REPORTS, PUBLIC REPORTS, ALL REPORTS, FOLDERS, and FAVORITES. The 'All Folders' folder is currently selected and highlighted in blue.

REPORTS	Name	Description	Folder
Recent	Heeet - Lead - First Click Report		Heeet Reports [2024]
Created by Me	Heeet - Lead - Last Click Report		Heeet Reports [2024]
Private Reports	Heeet - Lead - Acquisition Costs		Heeet Reports [2024]
Public Reports	Heeet - Lead - Channels Influence		Heeet Reports [2024]
All Reports	Heeet-Opportunity-First Click Channel		Heeet Reports [2024]
	Heeet-Opportunity-Last Click Channel		Heeet Reports [2024]
<b>All Folders</b>	Heeet-Opportunity-Channels Influence		Heeet Reports [2024]
Created by Me	Heeet - Campaign - Overview		Heeet Reports [2024]
Shared with Me	Heeet - Campaign Snapshot - Overview		Heeet Reports [2024]
FAVORITES			
All Favorites			

# Default Reports

## Lead Reports - Heeet - Lead - First Click Report

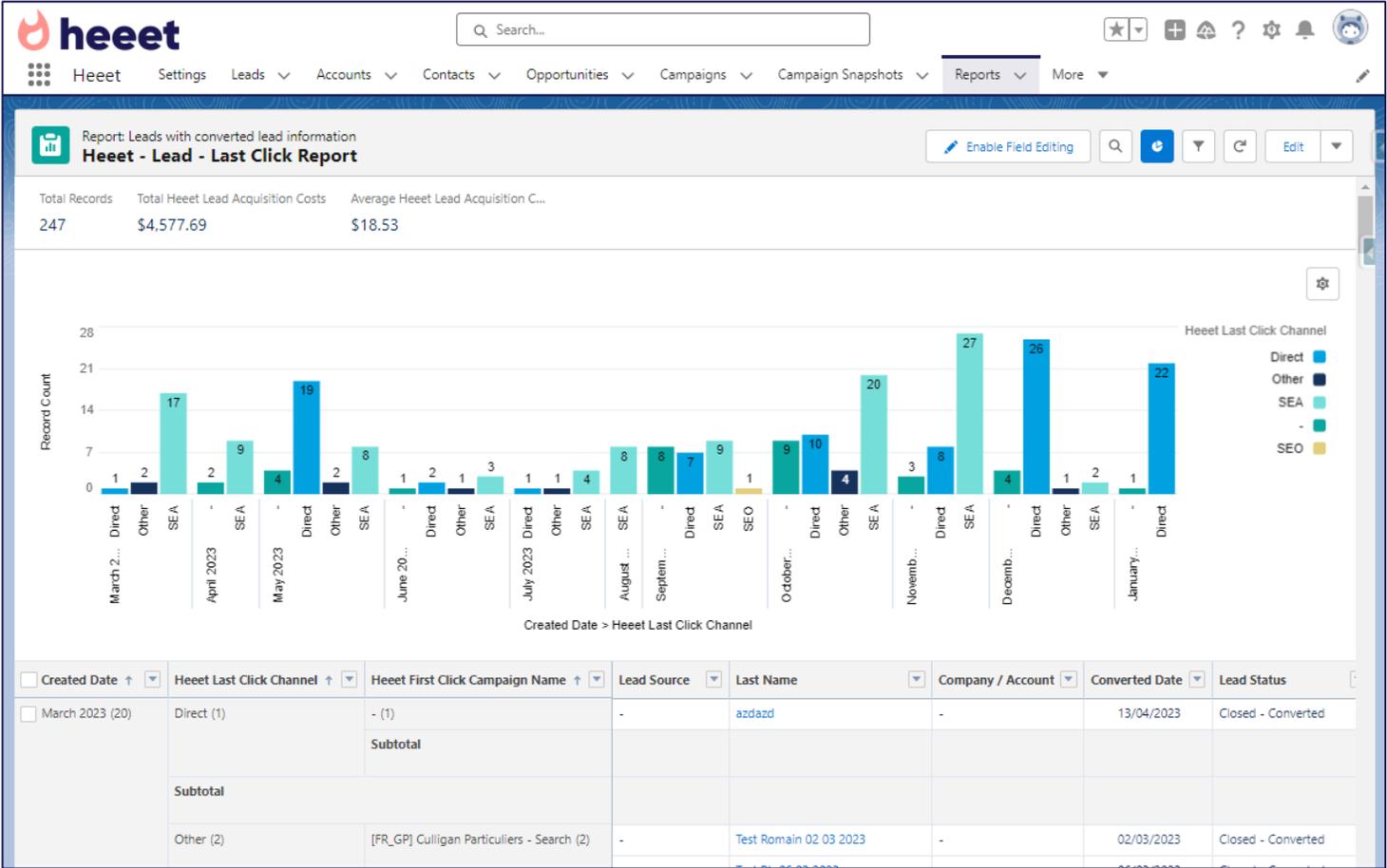
This report shows how many leads you get from each **first** click channels (SEO, Social, SEA, Direct, Other,...) and campaigns per month.



# Default Reports

## Lead Reports - Heeet - Lead - Last Click Report

This report shows how many leads you get from each **last** click channels (SEO, Social, SEA, Direct, Other,...) and campaigns per month.



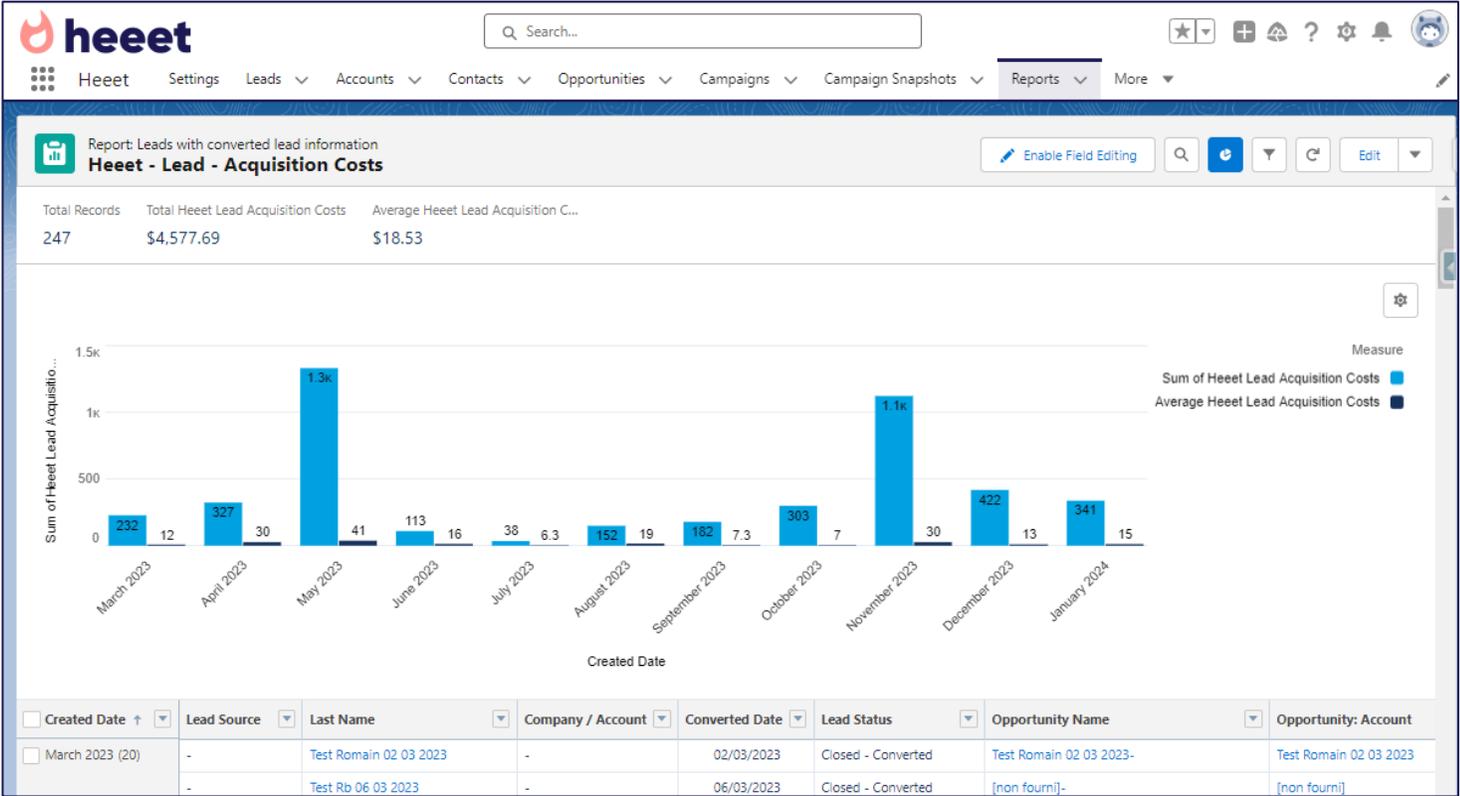
# Default Reports

## Lead Reports - Heeet - Lead - Acquisition Costs

This report shows how much you spent per month to acquire your online leads.

It shows both the total revenue spent and the average acquisition cost per lead.

If you want to filter it to a specific lead type (for example if you want to exclude outbound lead) you can customize it by adding specific filters.



# Default Reports

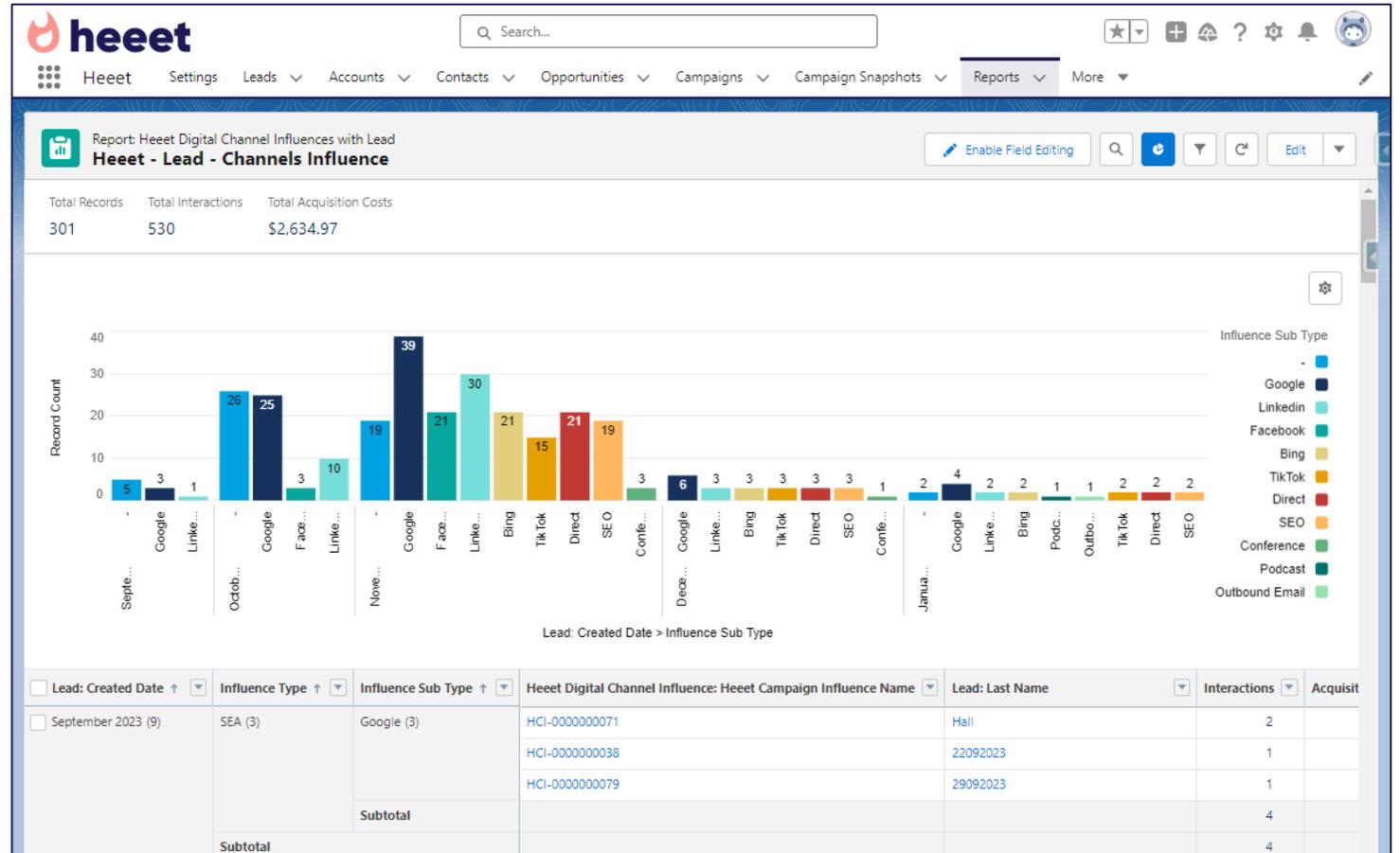
## Lead Reports - Heeet - Lead - Channels Influence

The lead influence report shows how many leads a specific channel had influenced on before it fills a form on your website.

This report is based on « Heeet Digital Channel Influence » records that are associated to a lead.

It is splitted per Influence « Sub Type » (SEO, Direct, Other, Google, Bing, LinkedIn, Facebook, Tik Tok).

Note that since a lead can be related to multiple influences, this report is not showing up the total number of leads but the total number of influences to see what where the top performing one over a specific period of time.

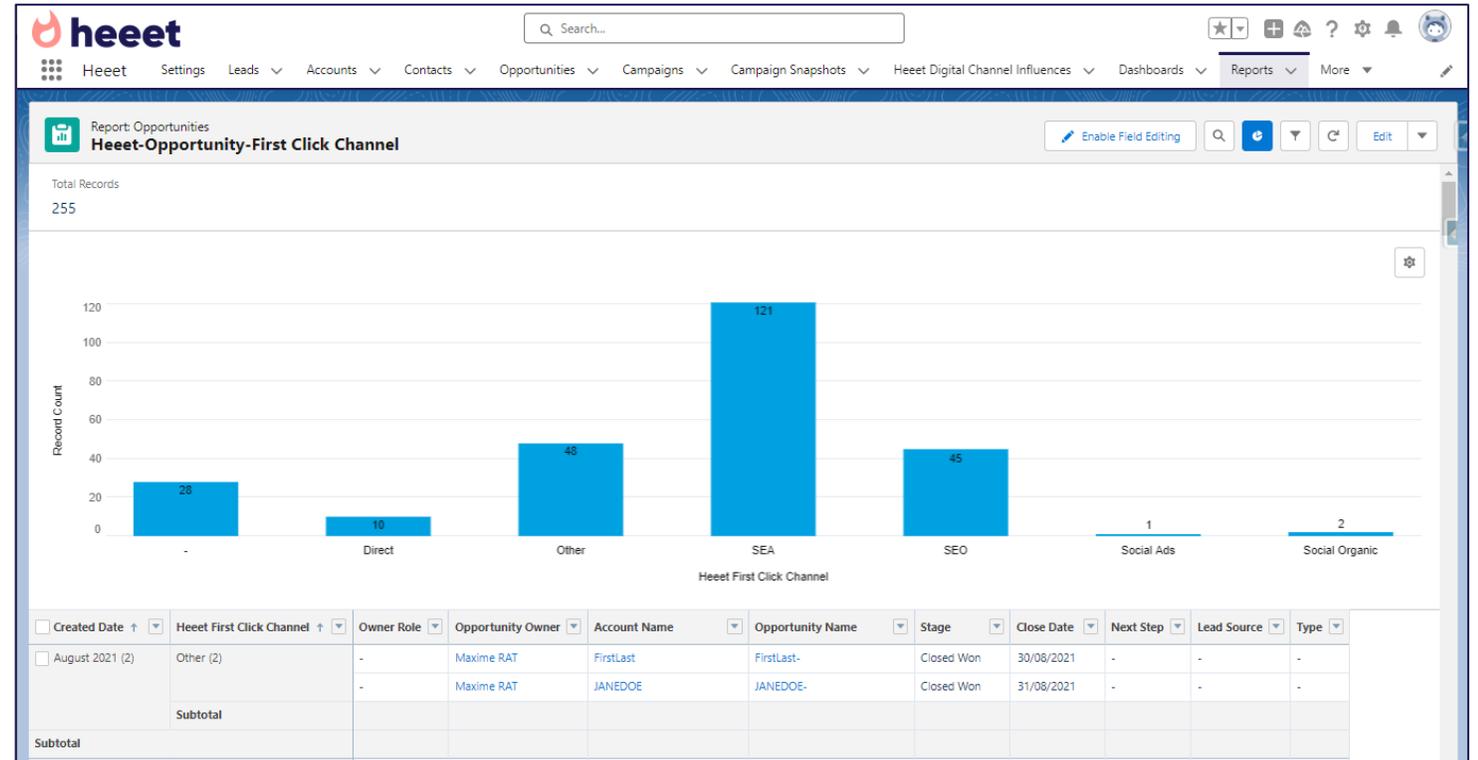


# Default Reports

## Opportunity Reports - Heeet-Opportunity-First Click Channel

This report shows how many opportunities you get from each **first** click channels (SEO, Social, SEA, Direct, Other,...) and campaigns per month.

You can customize this report to either display more granular data (ie: adding « First Click Campaign Name » as a group to see number of opportunities per paid campaigns) or financial data by adding the relevant revenue field of the Opportunity as column.

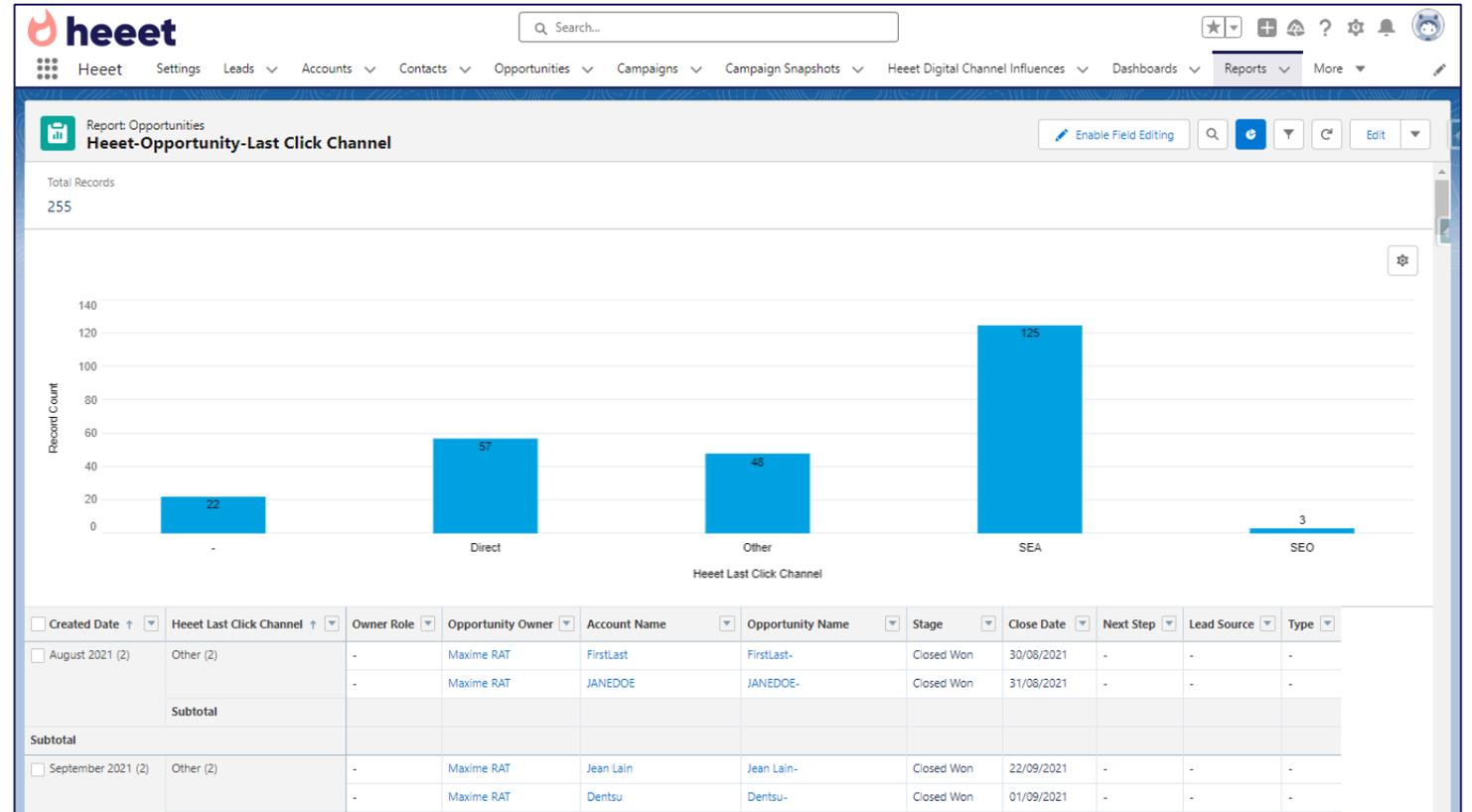


# 2.Default Reports

## Opportunity Reports - Heeet-Opportunity-Last Click Channel

This report shows how many opportunities you get from each **first** click channels (SEO, Social, SEA, Direct, Other,...) and campaigns per month.

You can customize this report to either display more granular data (ie: adding « Last Click Campaign Name » as a group to see number of opportunities per paid campaigns) or financial data by adding the relevant revenue field of the Opportunity as column.



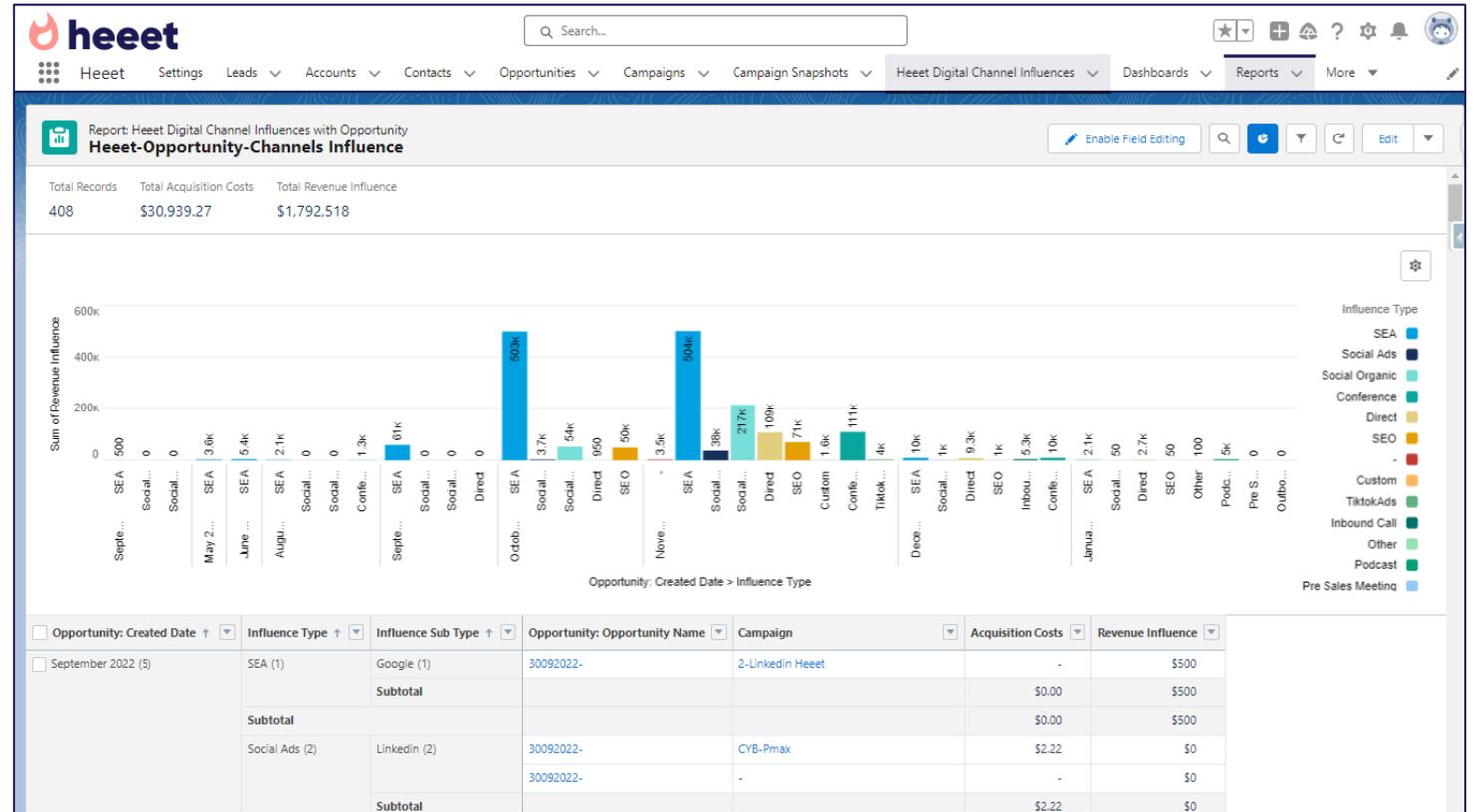
# Default Reports

## Opportunity Reports - Heeet-Opportunity-Channels Influence

This report shows how much revenue was influenced by each channels per month.

In this report you see how much revenue comes from SEO, Direct, Google, Bing, LinkedIn,...

You can customize this report to display more granular data by adding the « Campaign » field from the Heeet Digital Channel Influence object as a group.

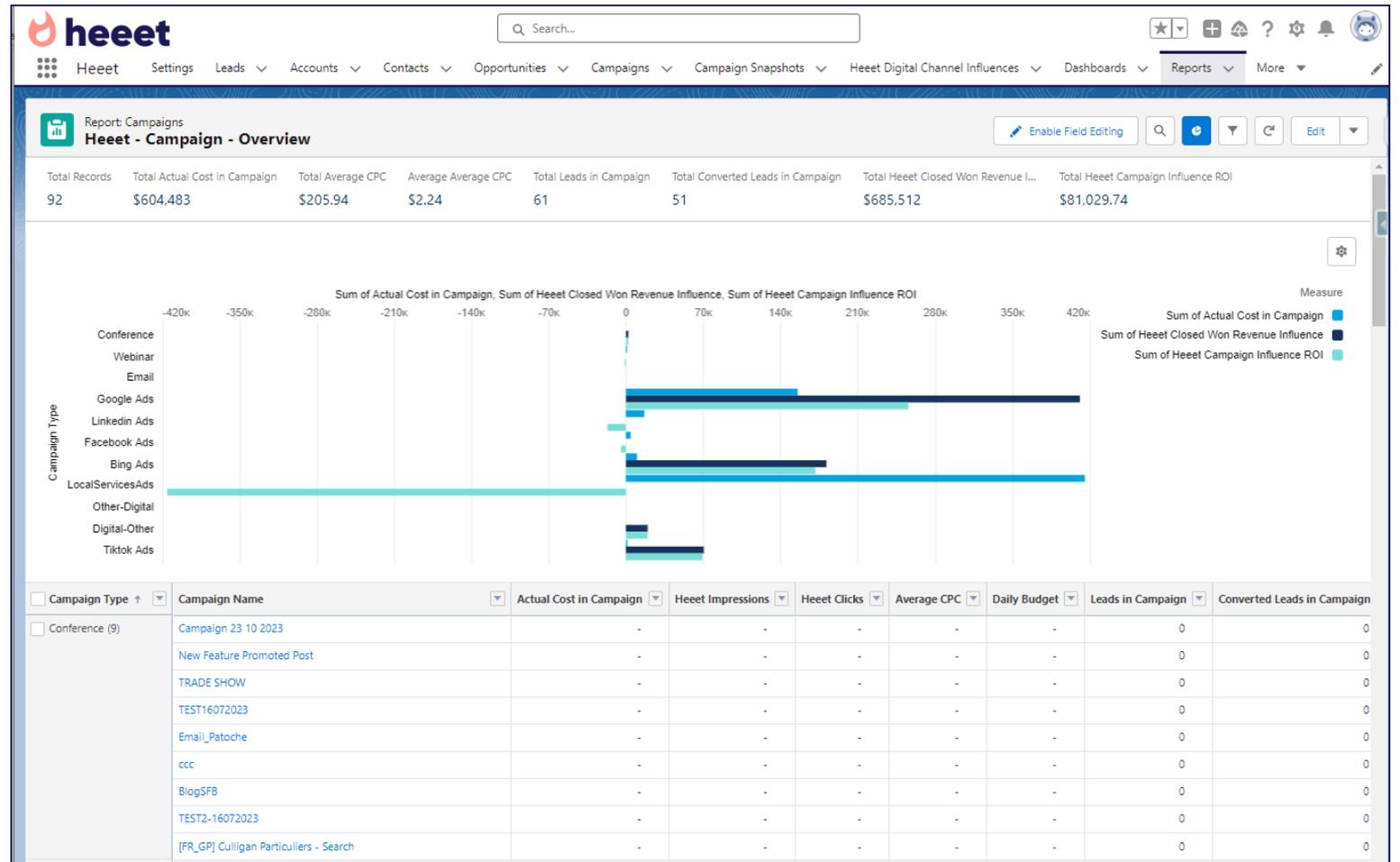


# Default Reports

## Campaign Report – Heeet-Campaign-Overview

This report shows the following statistics per campaigns since its start date.

- Actual Costs of the Campaign
- # of Impressions
- # of clicks
- Current CPC
- Current daily budget
- # of leads influenced
- # of converted leads influenced
- Total Influenced Revenue
- Campaign current ROI

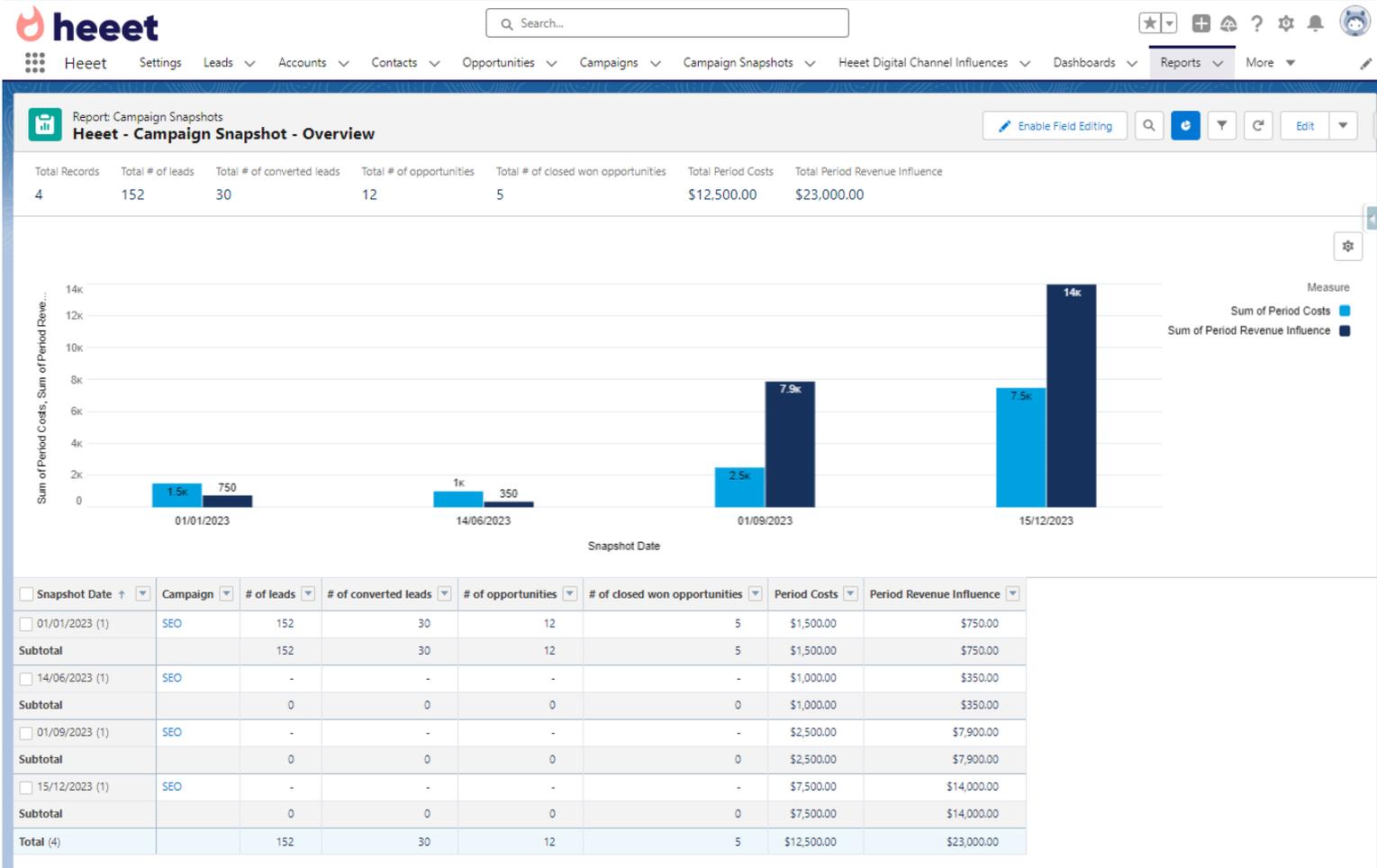


# Default Reports

## Campaign Snapshot Report – Heeet-Campaign-Overview

This report shows detailed campaign performance per month (if you activated the « Monthly » snapshot option in Heeet settings).  
 If you're using the « Weekly » option, then you would need to edit this report to summarize the first grouping column « Snapshot Date » per week instead.

This report shows you per timeframe selected how many leads, converted leads, opportunities have been generated by each campaign + specific period revenue influence and cost.



# CUSTOMIZING SALESFORCE LIGHTNING LAYOUTS

- Lead
- Opportunity
- Campaign

# Customizing Salesforce Lightning Layout

## Introduction

We built pre defined filtered report so you can easily add them to your Lightning Layout to provide a better experience to your users.

Some may only be interesting for marketing team while our « Content Influences » features could bring a lot of contextual value to your Sales team.

Ask your Salesforce Admin to customize Lightning Layout depending on your needs.

Click on Set Up > Edit Page

The screenshot displays the Heeet Salesforce Lightning interface. At the top, the navigation bar includes the Heeet logo, a search bar, and various menu items like 'Heeet', 'Settings', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Campaigns', 'Campaign Snapshots', 'Heeet Digital Channel Influences', and 'Dashboards'. A red box highlights the 'Setup' gear icon in the top right corner, with a dropdown menu showing options: 'Setup for current app', 'Service Setup', 'Developer Console', 'Edit Page', and 'Edit Object'. The 'Edit Page' option is also highlighted with a red box.

The main content area shows a lead record for 'John Doe' with the following data:

Company	Heeet Total Interactions	Heeet First Click Channel	Heeet Last Click Channel	Heeet First Visit>Form (# days)	Heeet Lead Acquisition Costs
ATrio	10	SEA	Direct	53,95	\$27.97

Below the lead record, there are tabs for 'Details', 'Activities', 'Campaigns', and 'More'. The 'Details' tab is active, showing a list of analytics and admin options:

- > Heeet Analytics - First & Last Click Data
- > Lead Details
- > Heeet Analytics - Lead Summary
- > Heeet Analytics - Interactions & Costs
- > Heeet Admin

The right side of the interface features a report titled 'Heeet Digital Influence' with the subtitle 'To what campaigns this lead has been exposed to?'. The report shows a horizontal bar chart for lead 'John' with the following data:

Campaign	Sum of Interactions
CYB-Pmax	1
Google Ads Competitor US	2
Google Ads Heeet Salesforce	1
Other	4
TikTok Heeet	1
WP-Download-Linkedin-2023	1

Below this report is another report titled 'What marketing channels this lead has been exposed to?' showing a horizontal bar chart for lead 'John' with the following data:

Influence Type	Sum of Interactions
SEA	4

# Customizing Salesforce Lightning Layout

## Introduction

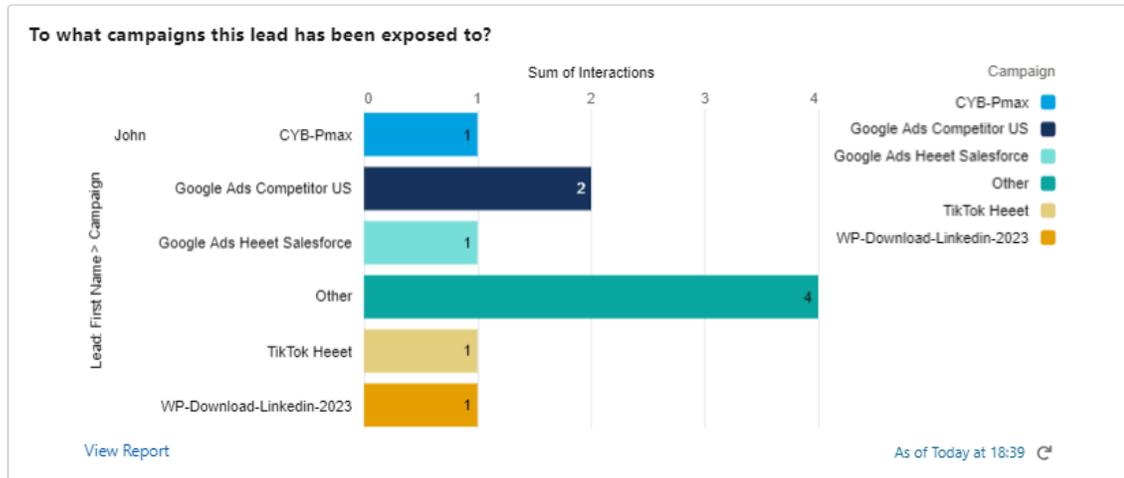
Once the Lightning Layout builder opened, search for report charts on the left hand side and drag the « Report Chart » component where you want to display pre built Heeet reports.

The screenshot shows the Salesforce Lightning App Builder interface for a 'Lead Record Page'. The left sidebar contains a search bar with 'report' entered and a list of components under 'Standard (1)', 'Custom (0)', and 'Custom - Managed (0)'. The 'Report Chart' component is highlighted with a red box. A red arrow points from this component to a 'Heeet Digital Influence' report chart displayed on the right side of the page. The report chart shows the sum of interactions for various campaigns for a lead named John.

Lead First Name > Campaign	Sum of Interactions
John > CVB-Pimax	1
John > Google Ads Competitor US	2
John > Google Ads Heeet Salesforce	1
John > Other	4
John > Tik Tok Heeet	1
John > WP-Download-LinkedIn-2023	1

# Customizing Salesforce Lightning Layout

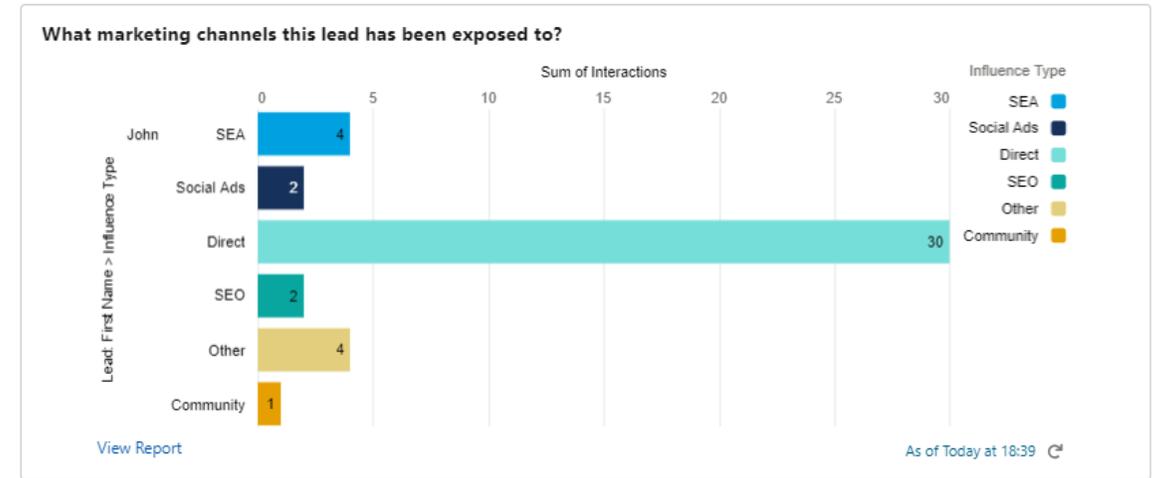
Available report chart – Lead Object



Report Folder: Heeet 2023

Report Name: Lead Channel Influence (Campaigns).

Description: this report shows what campaigns a lead clicked on prior filling a form on your website/..



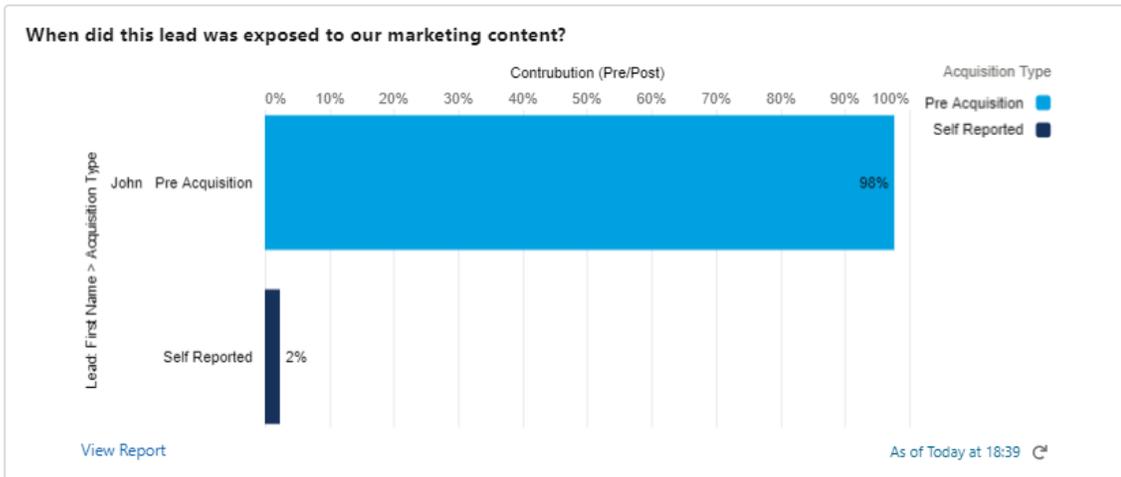
Report Folder: Heeet 2023

Report Name: Lead Channel Influence (Type)

Description: this report shows how many times a prospect came from each « Influence Type » (SEA, SEO, Direct, Social Ads,...)

# Customizing Salesforce Lightning Layout

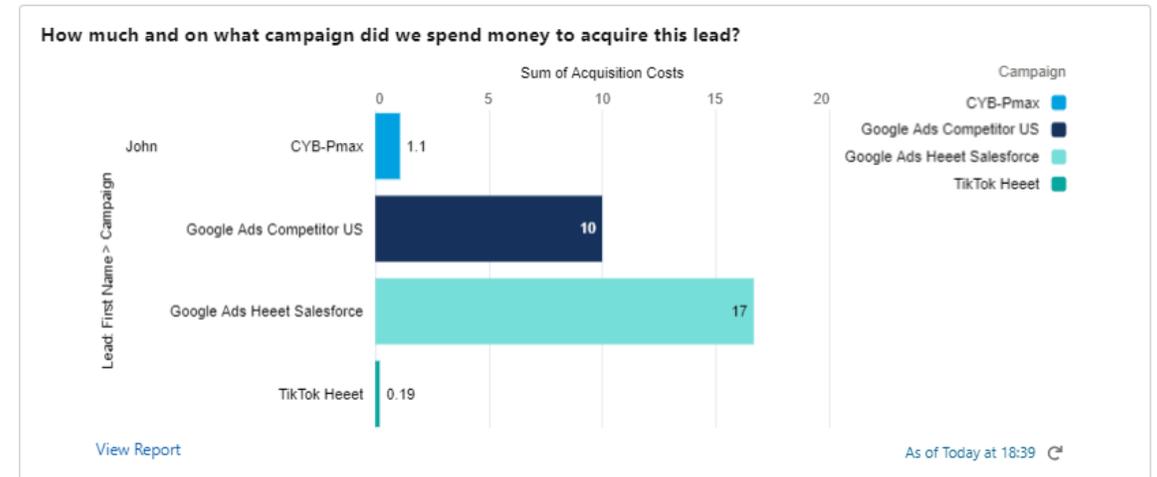
Available report chart – Lead Object



Report Folder: Heeet 2023

Report Name: Lead Acquisition Influence (Pre/Post)

Description: this report shows how many Pre/Post and Self Reported influences are related to this lead.



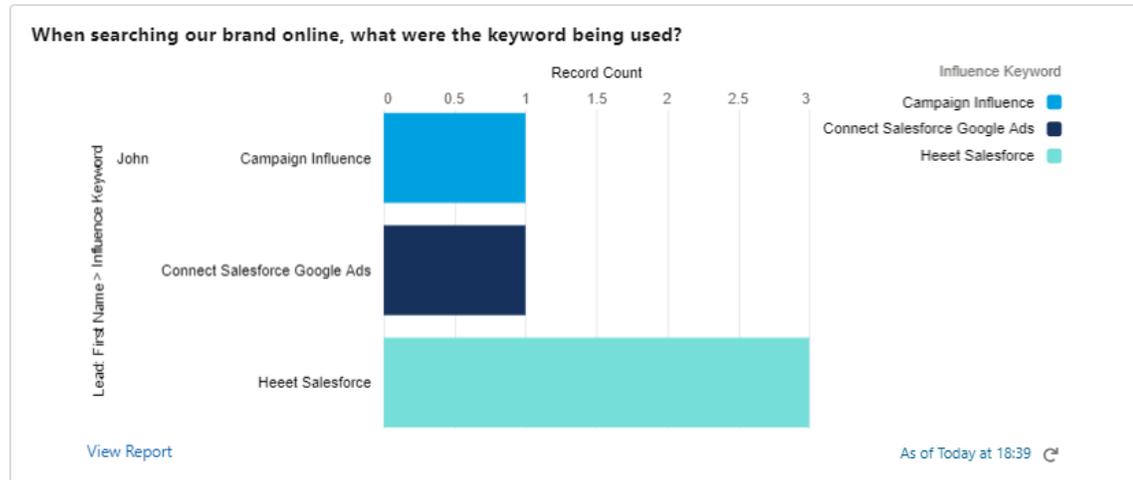
Report Folder: Heeet 2023

Report Name: Lead Acquisition Costs

Description: this report shows how much you spent to acquire this lead, splitted per campaigns.

# Customizing Salesforce Lightning Layout

Available report chart – Lead Object



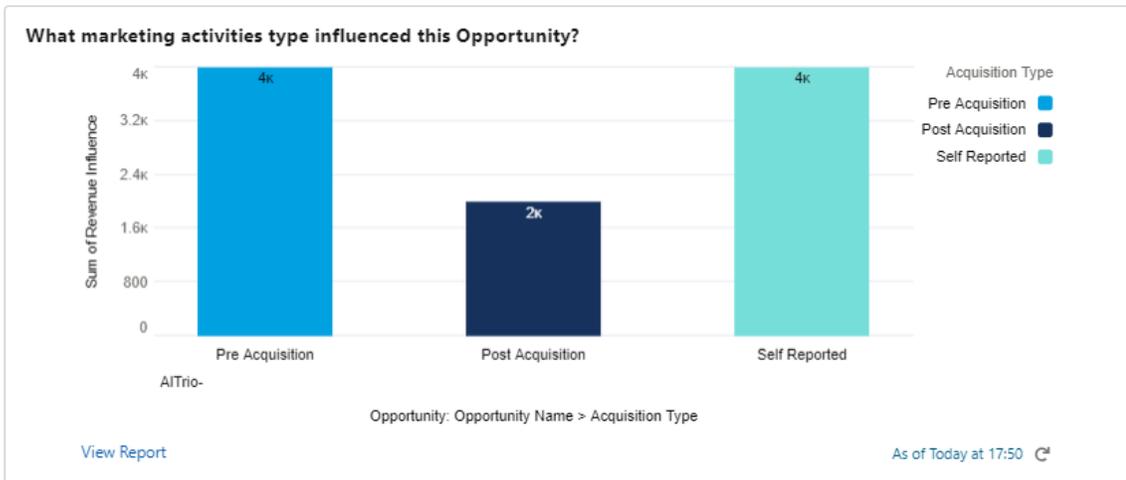
Report Folder: Heeet 2023

Report Name: Keyword Influence Lead

Description: this report shows what keywords this lead searched for and how many times before it filled a form.

# Customizing Salesforce Lightning Layout

Available report chart – Opportunity Object

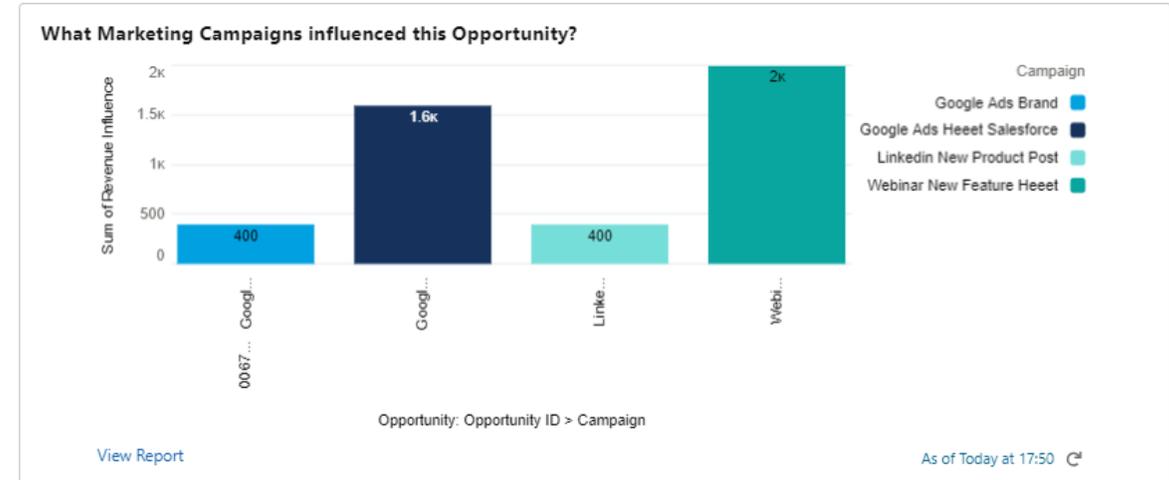


Report Folder: Heet 2023

Report Name: Acquisition Type Influence Opportunity

Description: this report shows Opportunity revenue split depending on Influence

Acquisition Type (pre, post, self reported)



Report Folder: Heet 2023

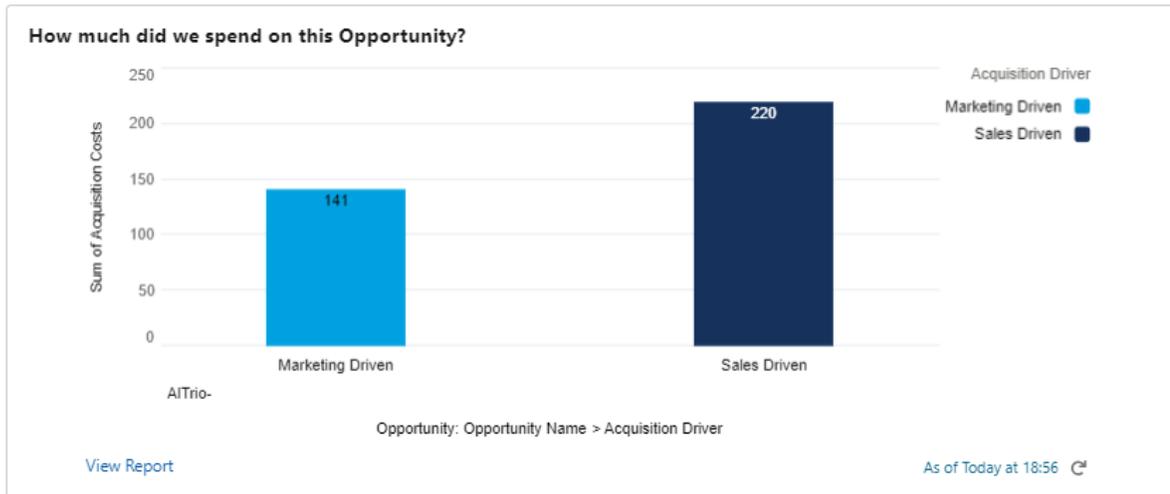
Report Name: Influence With Opportunities (campaigns)

Description: this report shows how much revenue comes from campaigns

for an opportunity.

# Customizing Salesforce Lightning Layout

Available report chart – Opportunity Object



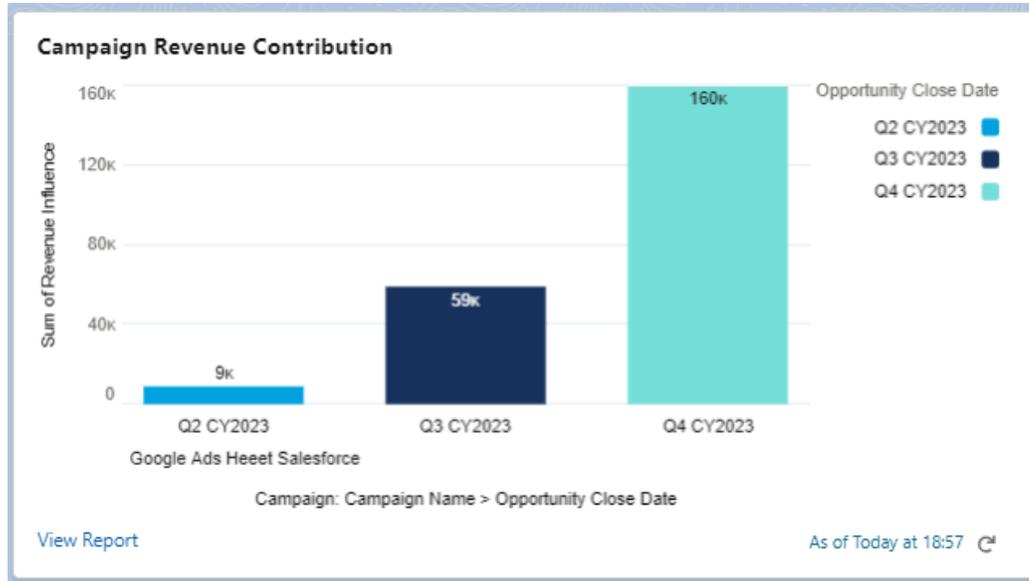
Report Folder: Heeet 2023

Report Name: Opportunity Acquisition Costs

Description: this report shows how much you spent before closing an opportunity, splitted between Marketing Driven and Sales Driven costs.

# Customizing Salesforce Lightning Layout

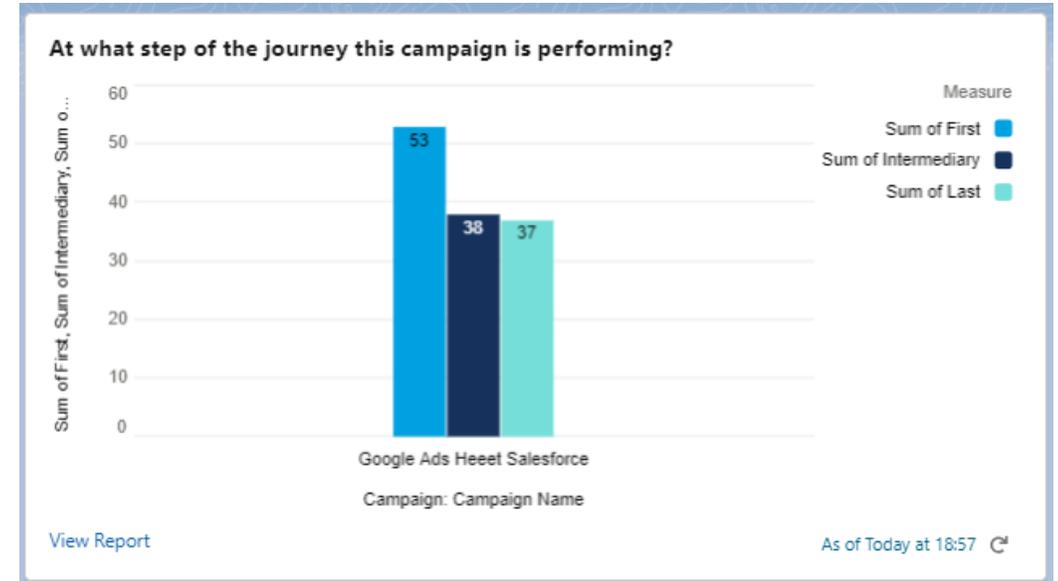
Available report chart – Campaign Object



Report Folder: Heeet 2023

Report Name: Heeet Campaign Influence Report

Description: this report shows how much revenue have been influenced by a Campaign over time, based on Opportunity close date.



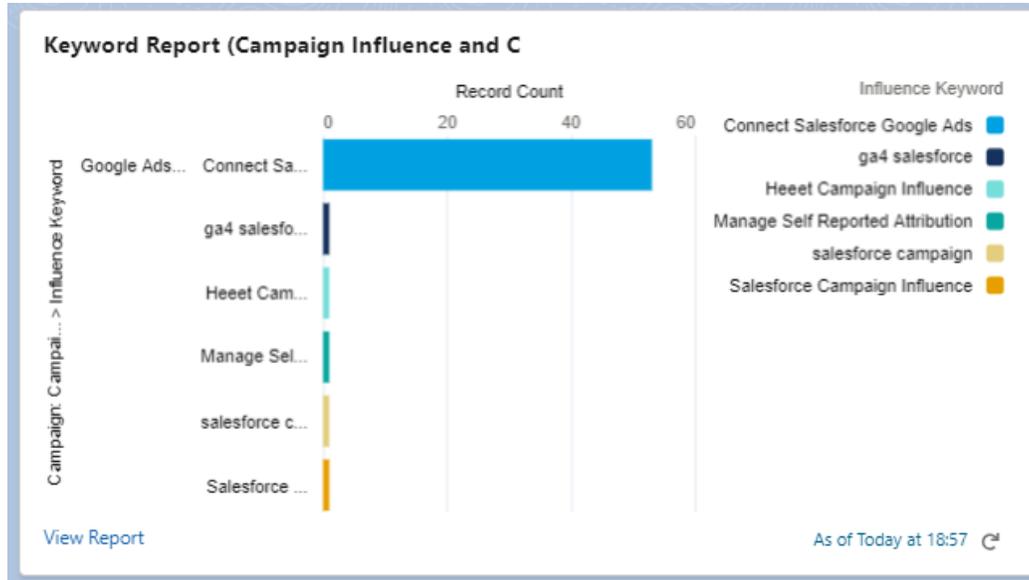
Report Folder: Heeet 2023

Report Name: Campaign Journey Influence

Description: this report shows at what step of prospect journey this campaign is being clicked on.

# Customizing Salesforce Lightning Layout

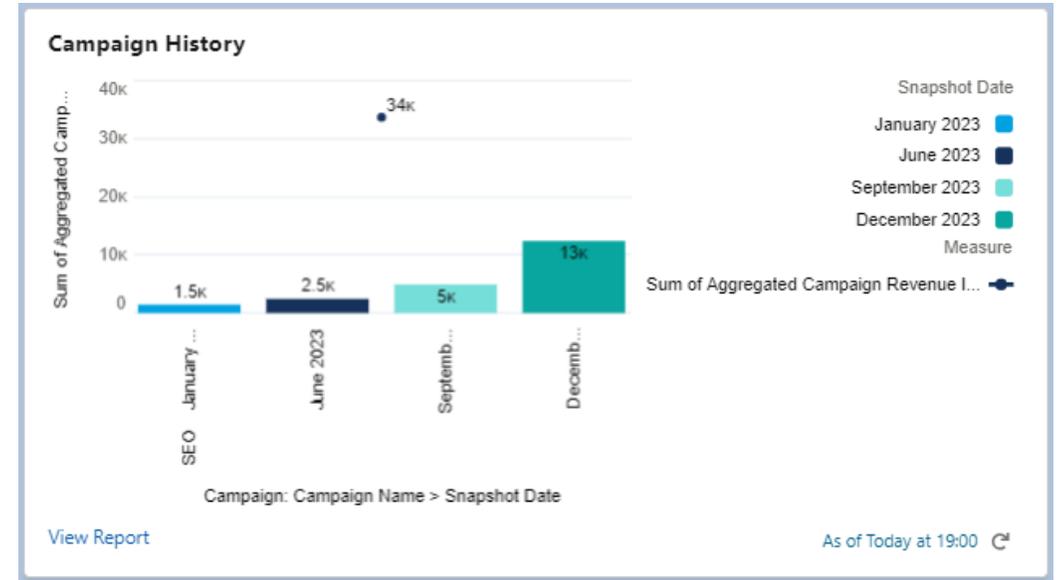
Available report chart – Campaign Object



Report Folder: Heeet 2023

Report Name: Keyword Report (Campaign Influence and C)

Description: this report shows top performing keyword in a campaign.



Report Folder: Heeet 2023

Report Name: Campaign Snapshots with Campaign

Description: this report shows how much you spent over time on this campaign and total influenced revenue

THANK YOU.

[support@heeet.io](mailto:support@heeet.io)