

# Tracking UTM Campaigns in ServiceMinder

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## Overview

Understanding where your leads come from is essential to measuring marketing effectiveness and optimizing ROI. ServiceMinder supports **UTM (Urchin Tracking Module) campaign tracking**, enabling you to associate leads and revenue with specific digital marketing efforts—such as emails, ads, and social media posts.

ServiceMinder uses **Channels** as your primary lead source and organizes them into individual **Campaigns**. UTM parameters allow you to track which marketing activities are driving the most engagement, proposals, and closed sales.

## What Are UTM Parameters?

UTM parameters are tags added to URLs that help you track the effectiveness of your campaigns in analytics tools. These values are automatically captured when a lead completes a form that includes a UTM-tagged link.

Here's a breakdown of the UTM parameters you can track within serviceminder:

Parameter	Purpose	Example
utm_source	Identifies the source of traffic	facebook , google
utm_medium	Describes the marketing medium	email , cpc , social

## How UTM Data Works in ServiceMinder

When a contact submits a lead form containing UTM-tagged URL parameters, ServiceMinder will automatically try to match those values to an existing **Channel** and **Campaign**. This makes it easy to attribute leads to specific marketing efforts inside your account.

To enable this functionality, you'll need to configure **UTM matching** on your Channels and Campaigns.

## Setting Up Channels and Campaigns with UTM Matching

1. **Go to:** `Control Panel > Channels`
2. Create or edit an existing Channel or Campaign
3. Fill in:
  - **UTM Medium Match** (matches against `utm_medium`)

- **UTM Source Match** (matches against `utm_source` )

When ServiceMinder sees a form submission with UTM parameters that match your settings, it automatically attributes the contact to the corresponding Channel and Campaign.

Tip: You can use partial matches. For example, if `utm_source=facebook` , setting the UTM Source Match to `facebook` will trigger a match.

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## Where to View UTM and Campaign Data

Once captured, UTM tracking data becomes part of the contact's record and is available in multiple areas:

- **Contact Details:** Under the *Marketing/Sales Info* section, you'll see the associated Channel and Campaign.
- **Campaigns Page:** Navigate to **Campaigns** from the top menu to view and manage your campaign performance.
- **Reports:** Use reporting tools to analyze:
  - Number of leads per campaign
  - Proposal and invoice revenue by source
  - Conversion metrics (e.g., proposals to sales)
- **Grid Filters:** Filter your Contacts grid by Channel or Campaign for more focused analysis.

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## Best Practices for UTM Tracking

- **Use consistent naming:** Standardize UTM values (e.g., `utm_source=facebook` , not `FB_ads` vs `Facebook` ).
  - **Avoid spaces and capitalization:** Stick to lowercase and use underscores or dashes.
  - **Test your links:** Make sure they work and match your configured UTM values in ServiceMinder.
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