SOP 017: Set Up Facebook (Meta) Conversion Tracking

Perfectly track leads, pageviews, button clicks, signups, purchases or any other event, using Facebook's pixel conversion tracking.

Last Updated / Reviewed: 12/10/2024 **Execution Time:** 15-30 minutes

🚀 **Goal:** Have all your conversions set up and send the conversions data to the Meta Ad platform.

🤞 **Ideal Outcome:** The conversions are properly set up and you can now use them inside your Ad campaigns.

🤔 **Why this is important:** When you finish this SOP, you should then be able to see how many conversions and how much revenue each advertisement is bringing you, allowing you to start optimizing your campaigns for the best results.

🧐 **Where this is done** In your Google Tag Manager account and Meta Ads platform.

🗓️ **When this is done:** Every time a new conversion needs to be measured.

👨 **Who does this:** The person responsible for IT, analytics or paid advertising.

⚠️**Prerequisites or requirements:**
To follow this SOP to add **Standard Events**, you need:
• Google Tag Manager is installed on your site. If you haven't done so already, you can follow SOP 004 . If you're using WordPress, you can follow SOP 065 . Follow SOP 066 if you're using Squarespace.
• You should also have a Meta Business Suite account for your site. To do that, follow SOP 010 .
• You also need to have the Meta (Facebook) pixel on your website. If you don't have it yet, you can follow SOP 005 .
Finally, you'll need to verify your domain inside Meta Business Suite. To do this, you can follow SOP 97 .

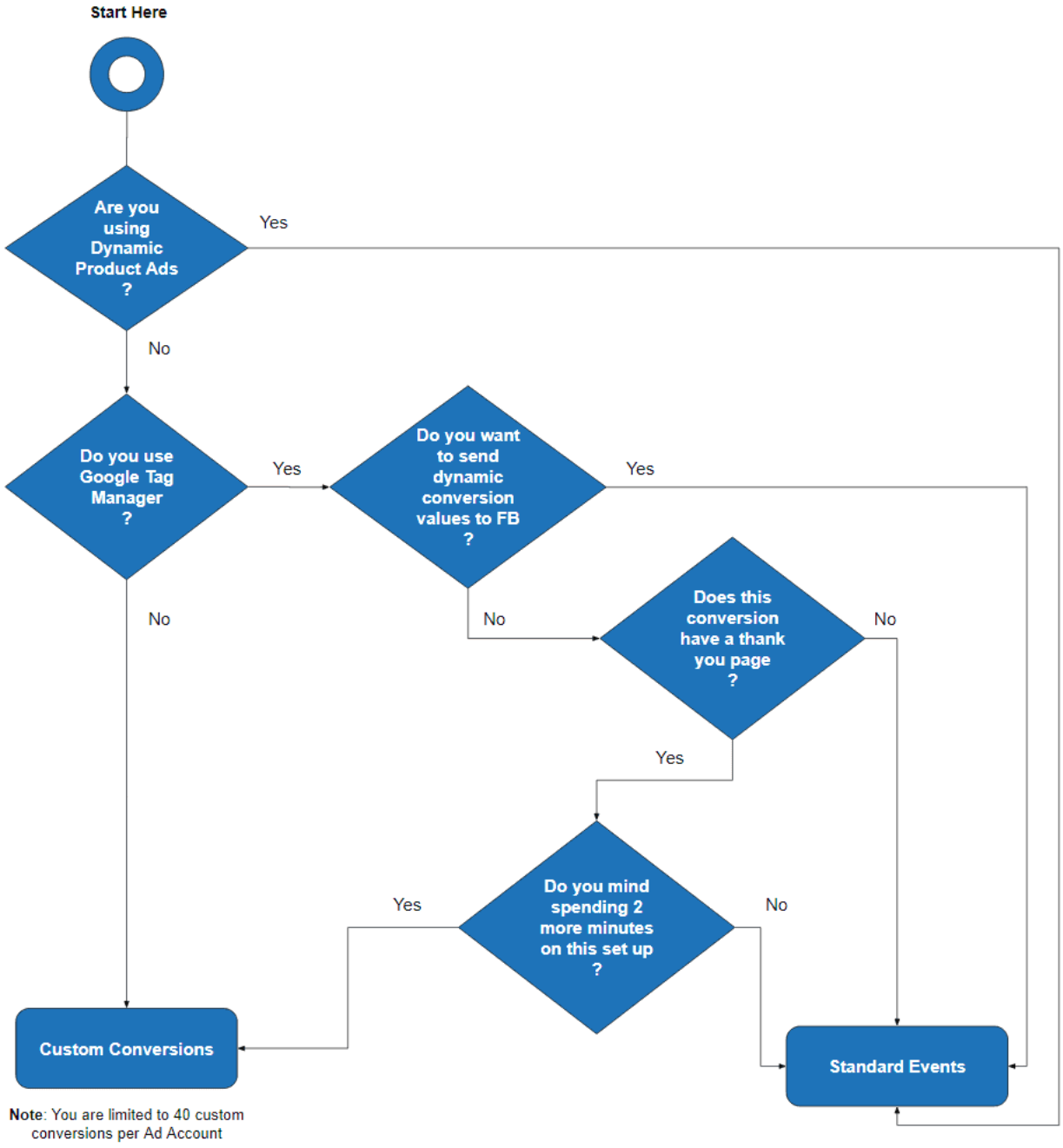
Environment set up

Important:

- On April 27th, 2021, Facebook rolled out new ad measurement protocols to conform with iOS14 and introduced the App Tracking Transparency (ATT) prompt. Apple's immediate requirement will also prohibit certain data collection and sharing by businesses unless Apple device users who updated to iOS14 opted for data tracking.
- When Apple users opt out of data tracking and tracking accuracy, the remarketing audience size decreases.

Deciding which conversion tracking method is better for you

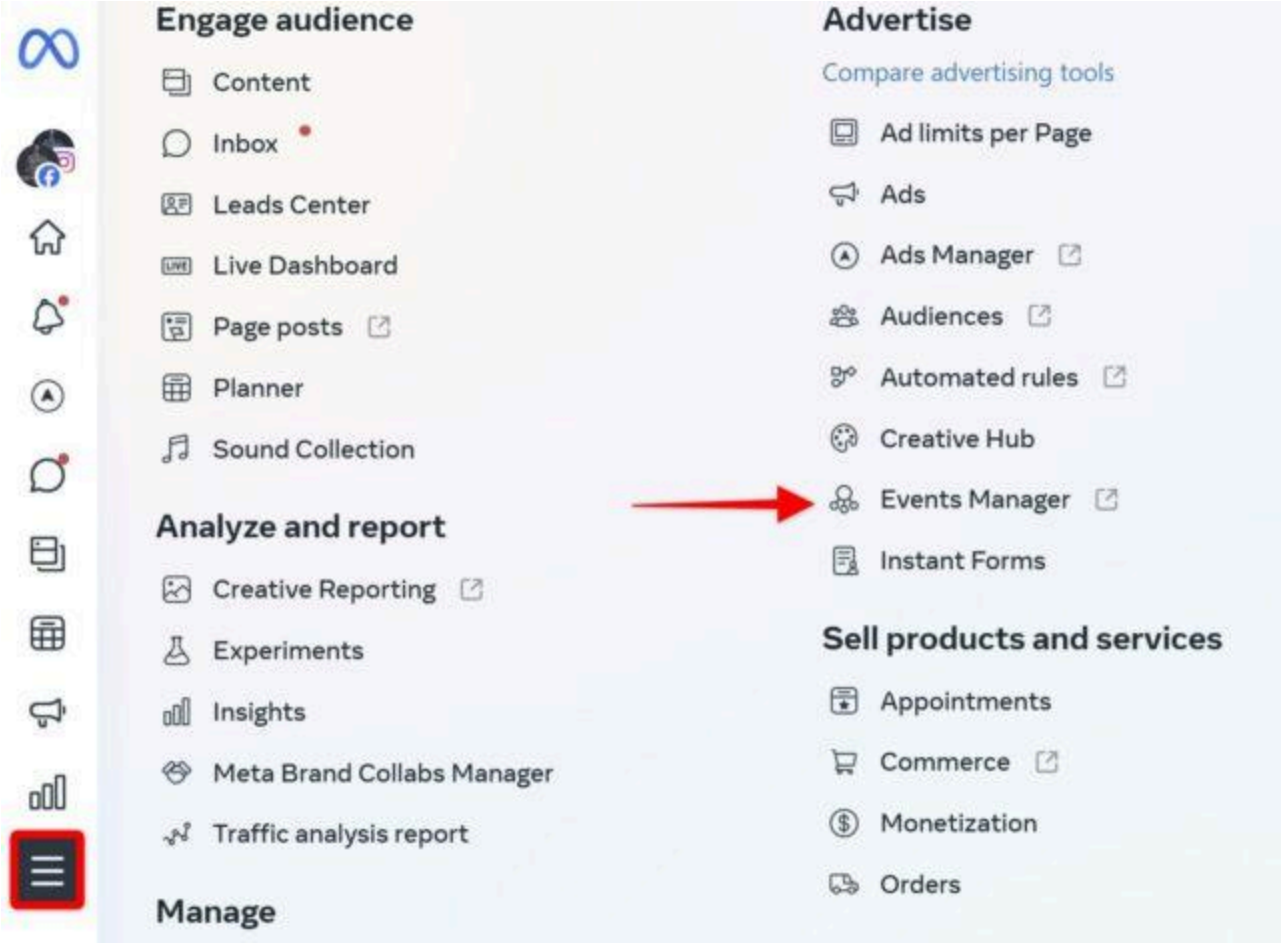
Note: If you are already familiar with Facebook Conversion tracking and prefer one method over the other, you can skip this chapter and go straight to the tracking method you prefer. In some cases, choosing one over the other can be a personal preference. For the purpose of this SOP, a decision diagram was created to simplify the decision process.



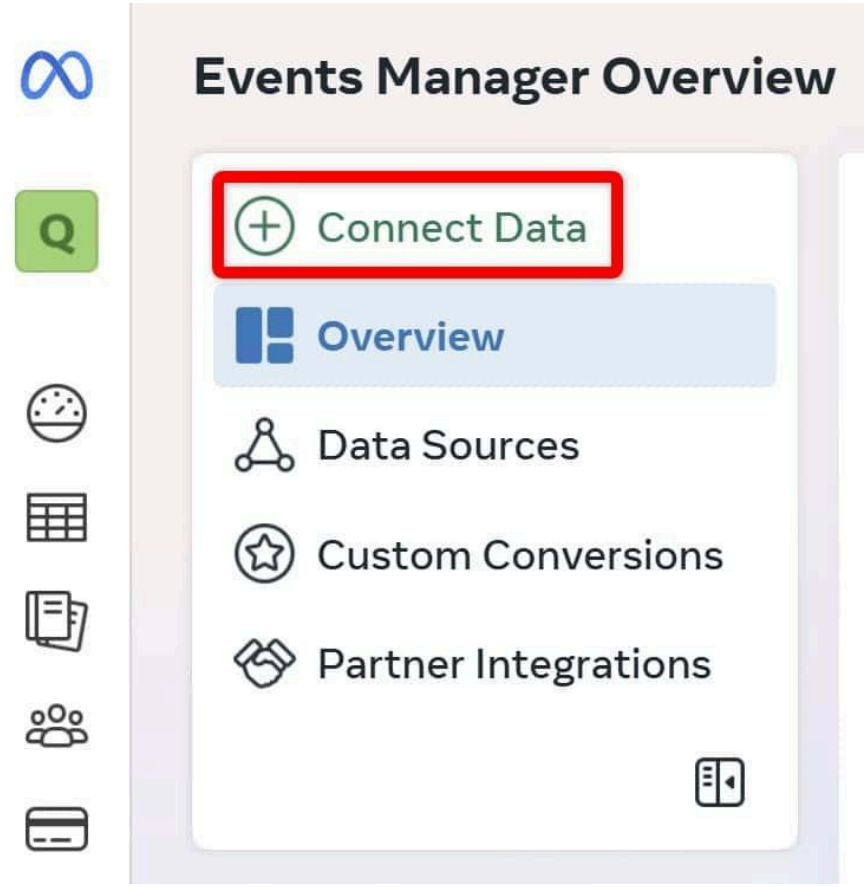
Connect Meta pixel to your website in Meta Business Suite

01▸ Open Meta Business Suite on your browser by going to https://business.facebook.com.

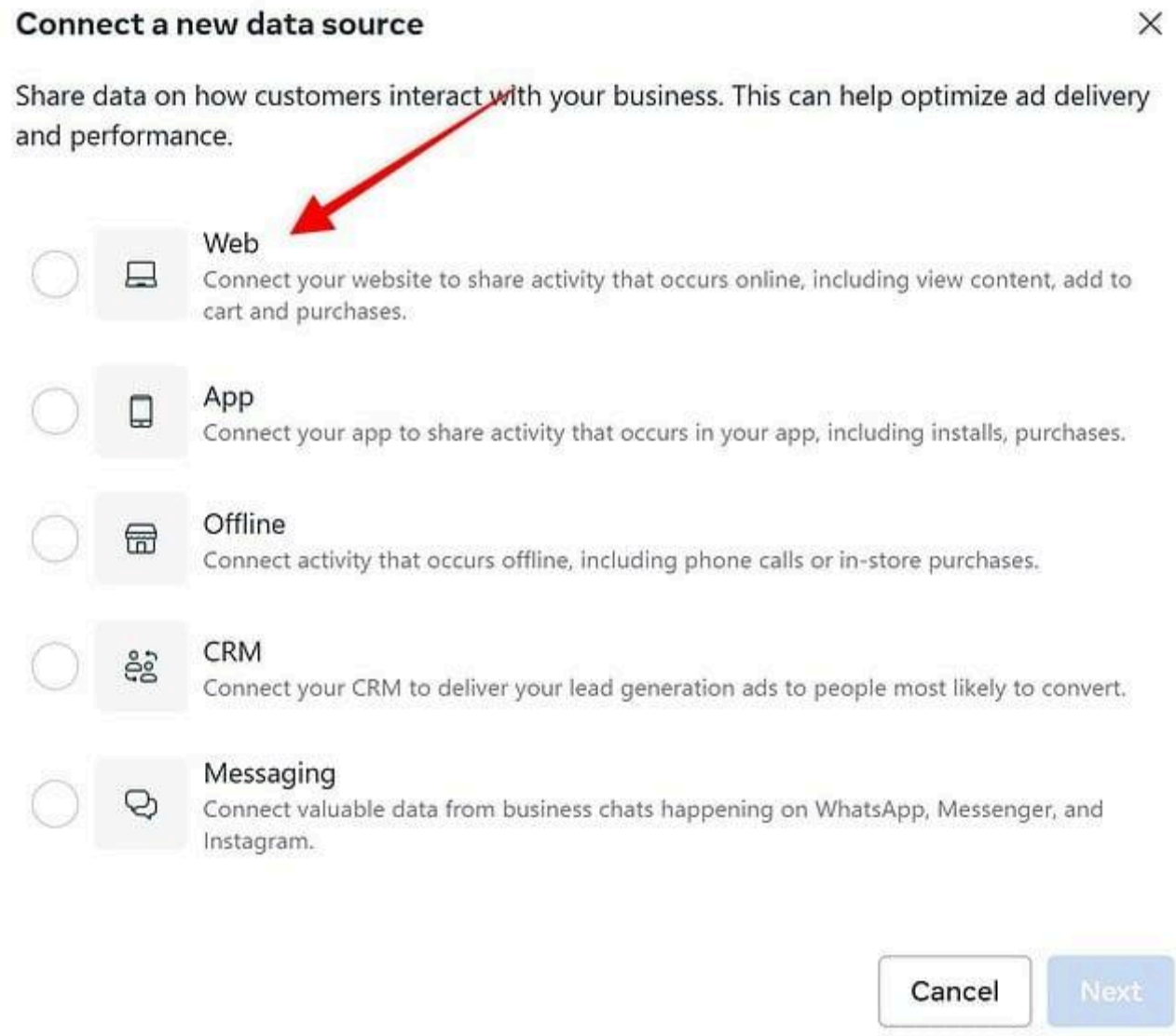
02▸ On the sidebar, click "All tools" followed by "Events Manager".



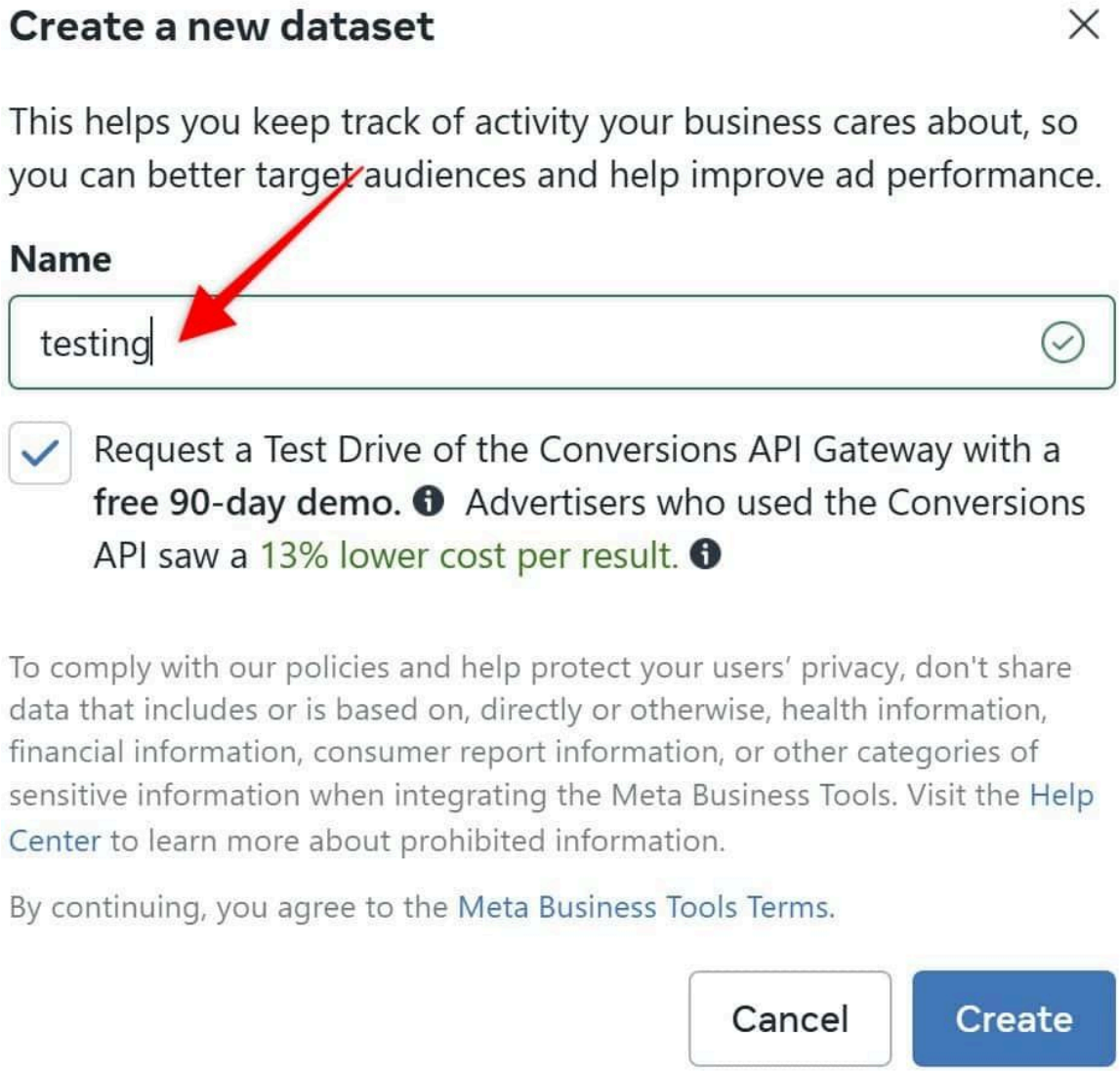
03▸ In the "Events Manager Overview", click "+ Connect Data".



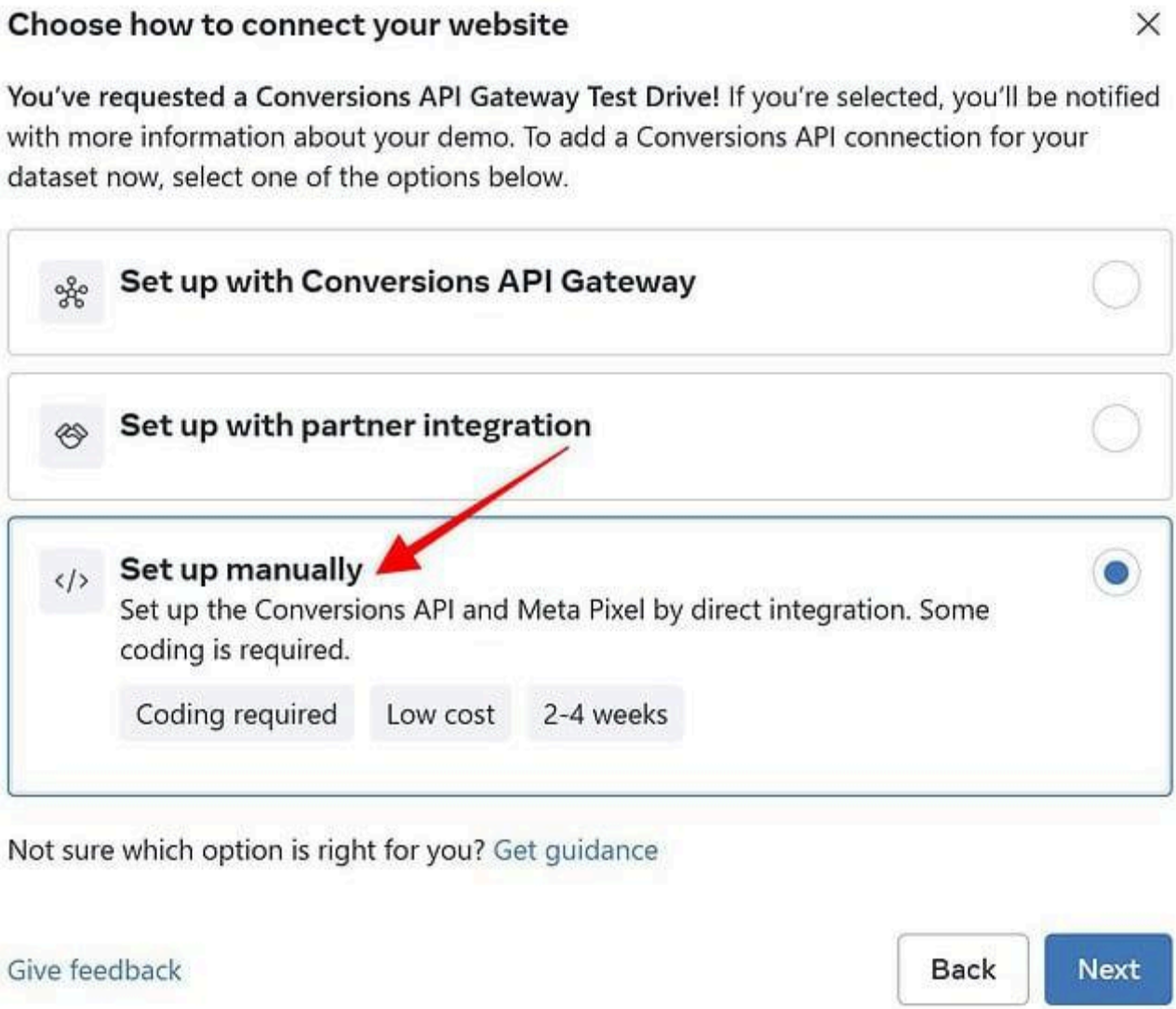
04▸ Next, click on "Web" followed by the "Next" button.



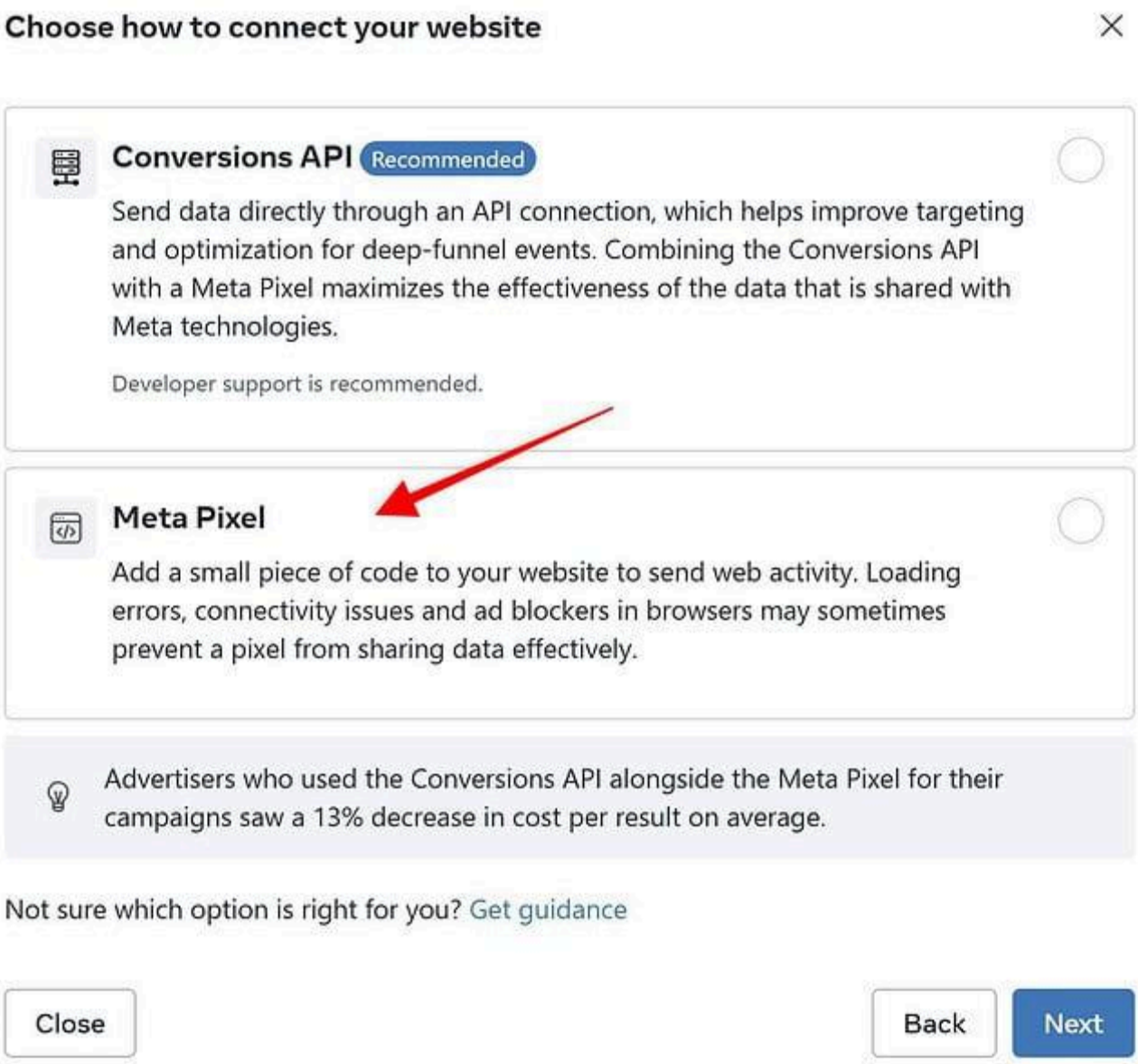
05▸ Name your new dataset and hit "Create".



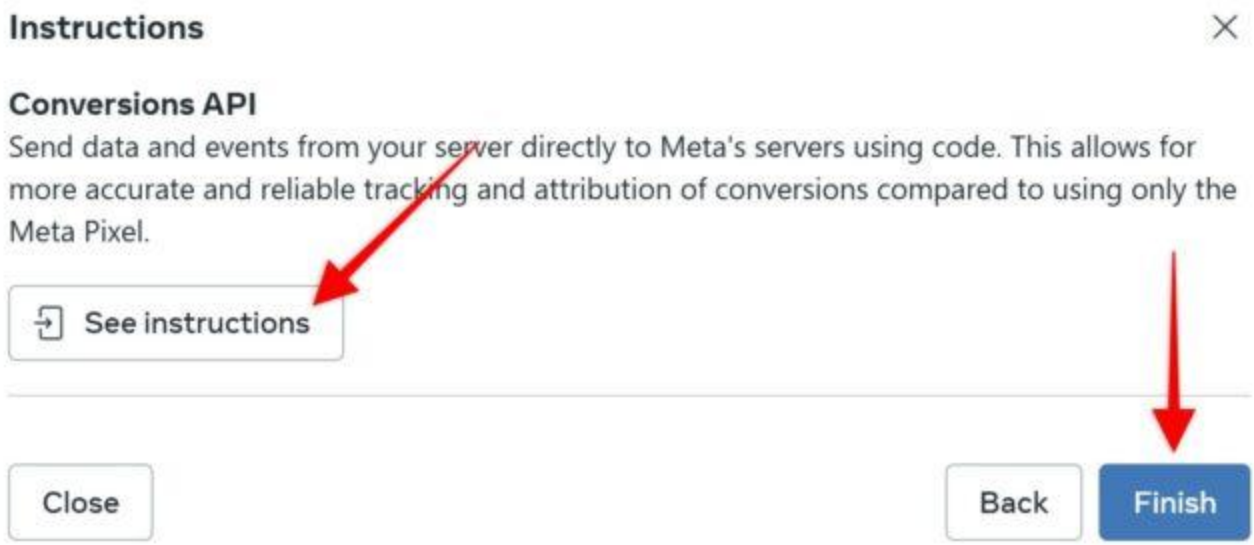
06▸ Next, click "Set up manually" and hit "Next".



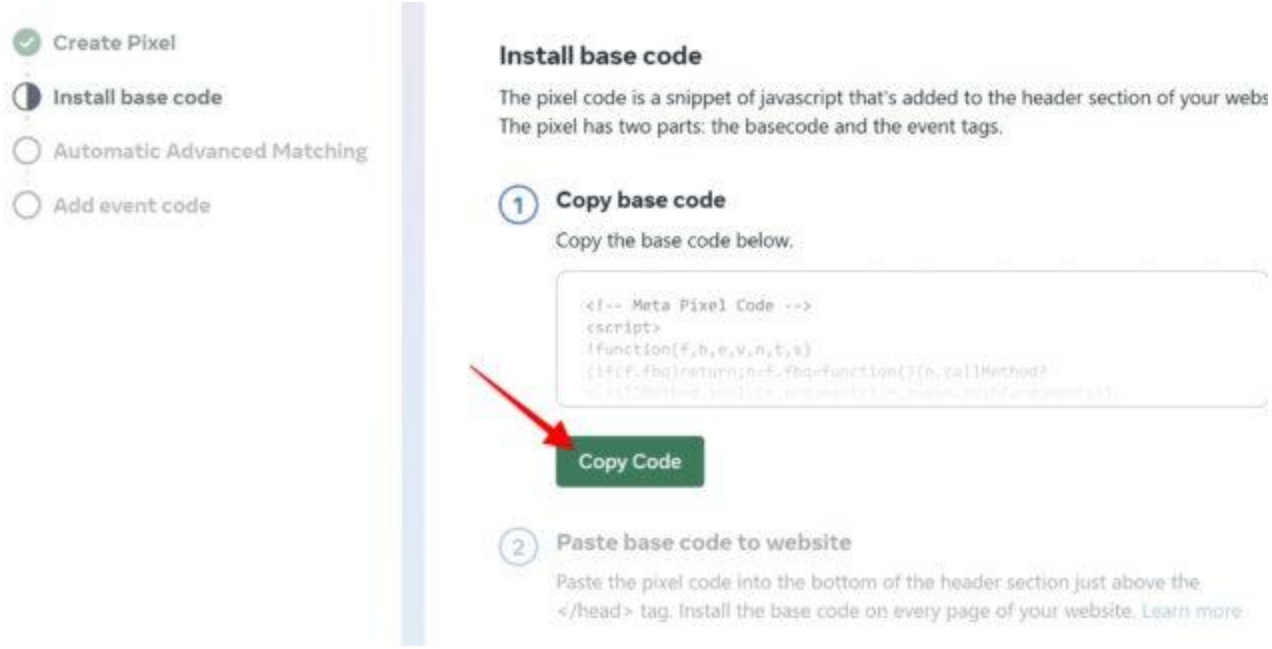
07▸ Select "Meta Pixel" and hit "Next".

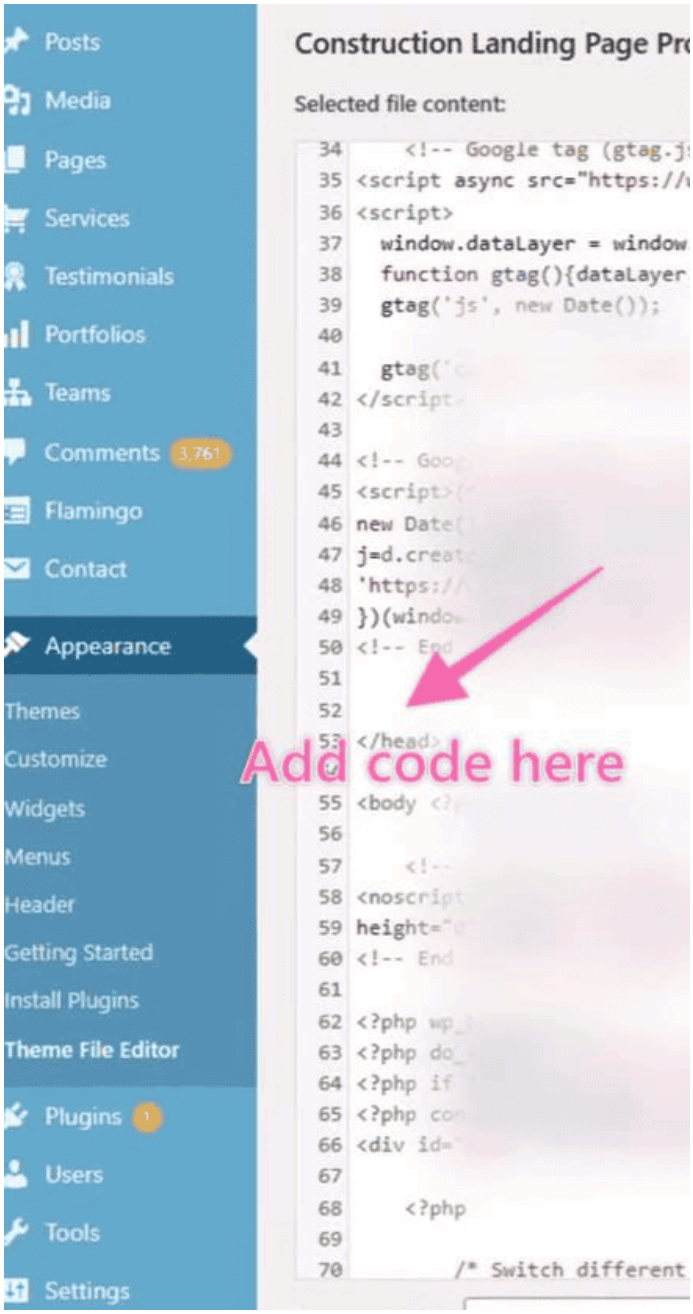


08▸ Click "See instructions". This will lead you to the code that you'll need to copy. Hit "Finish" to proceed.



09▸ Copy the base code, which you will need to paste onto your website before the closing header tag "</head>".



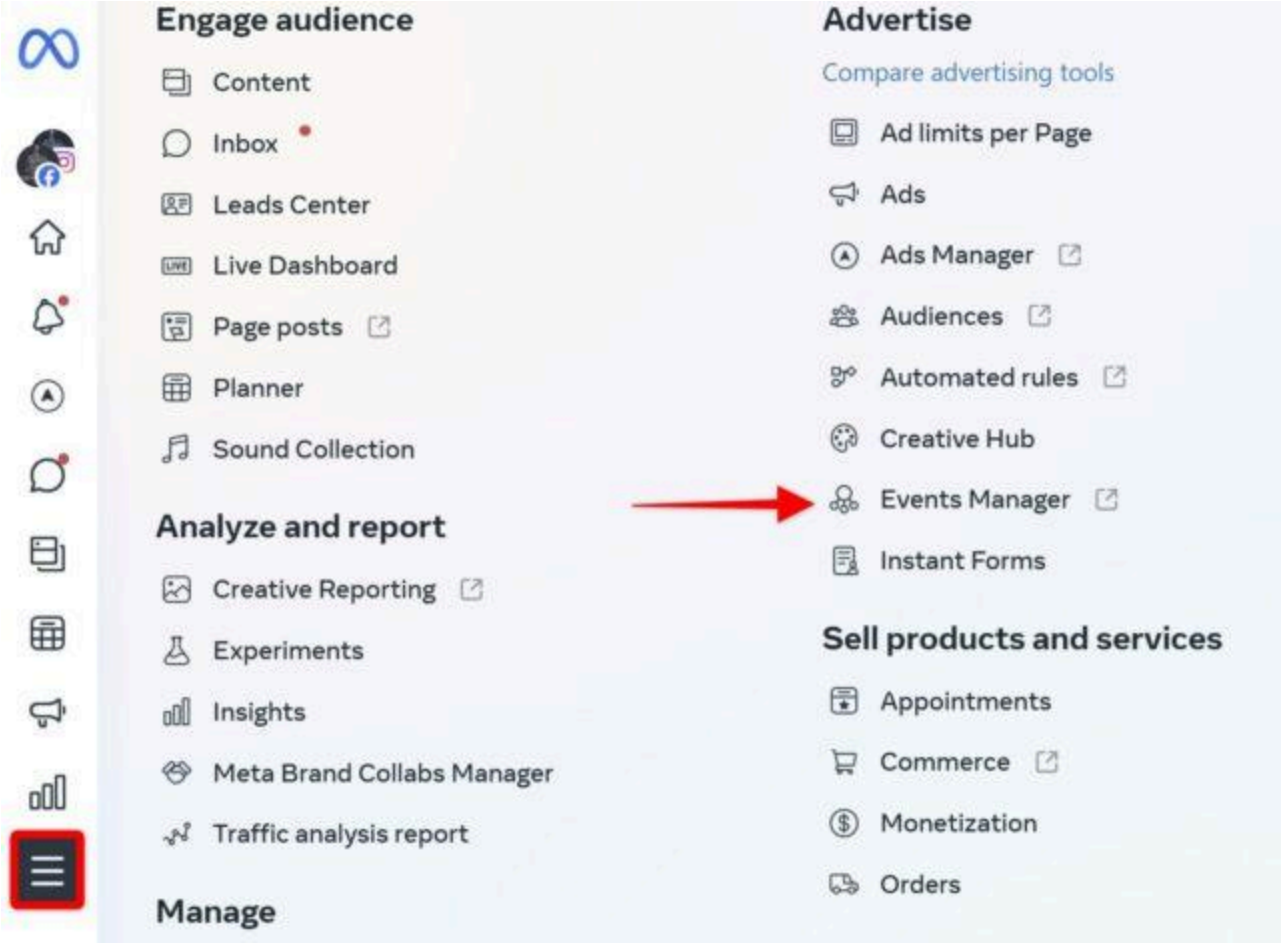


After you're done, jump to "Check if conversions are being tracked properly" in this SOP.

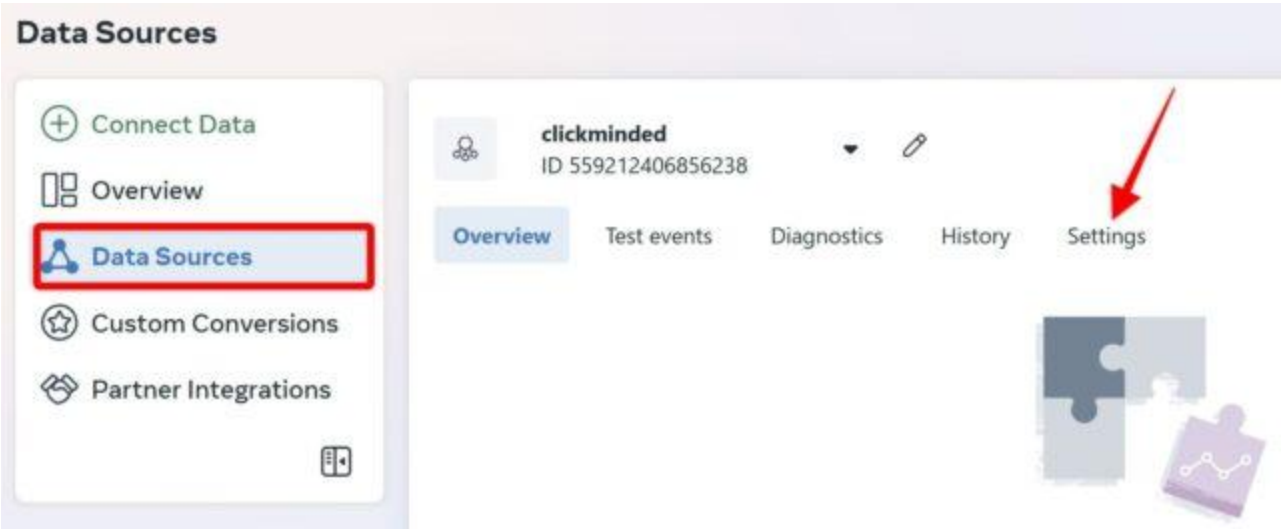
Setting up conversion tracking with Meta Business Suite

01▸ Open Meta Business Suite on your browser by going to https://business.facebook.com.

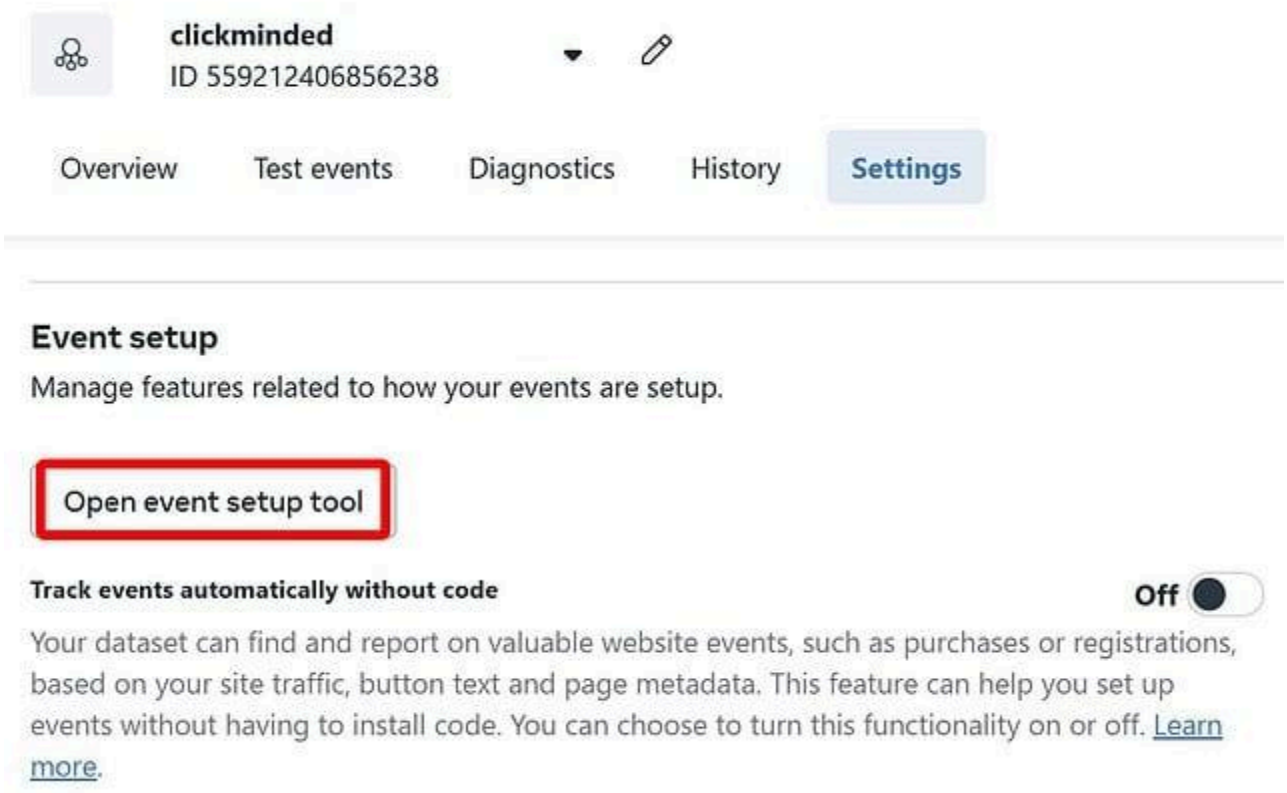
02▸ On the sidebar, click "All tools" followed by "Events Manager".



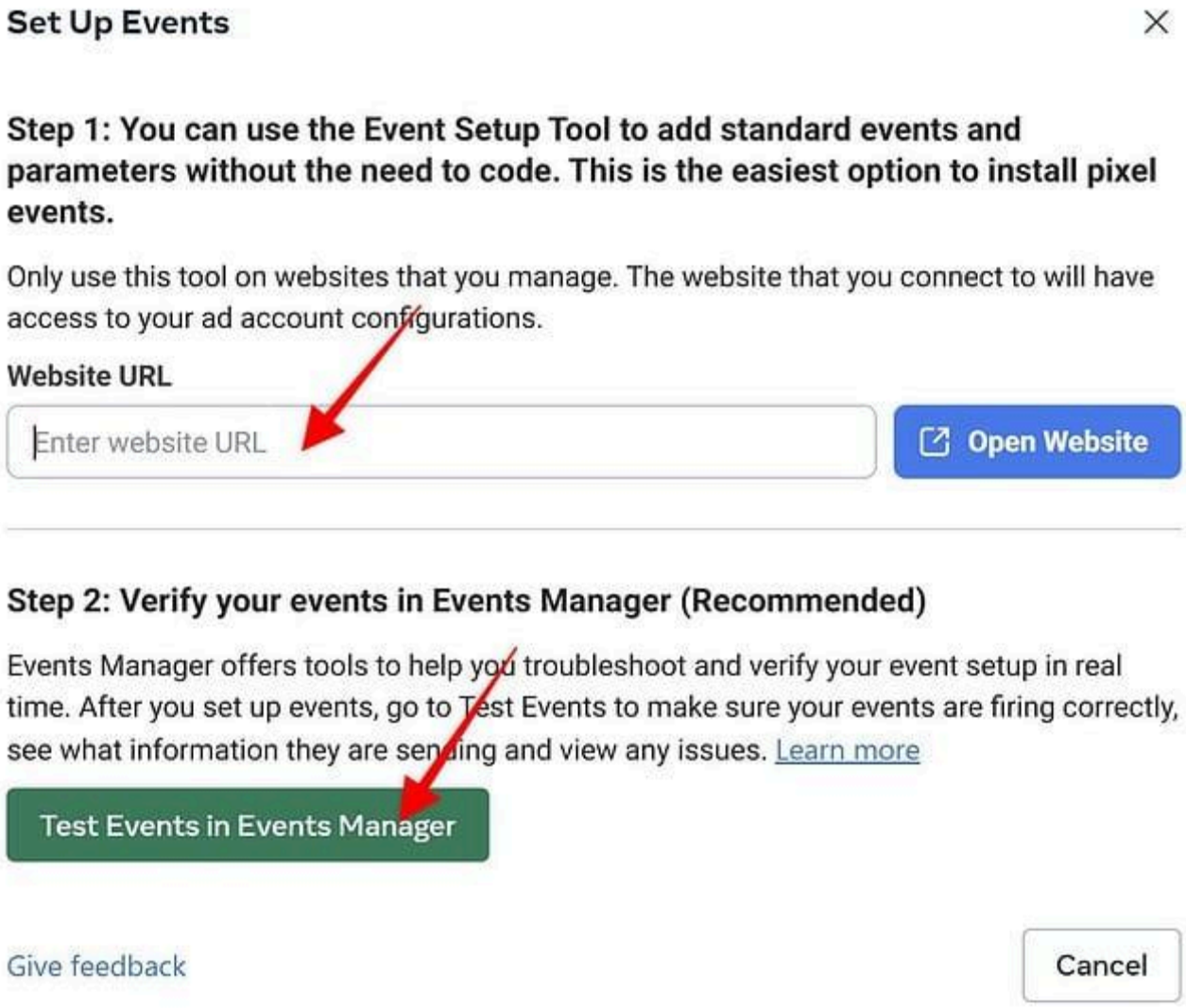
03▸ In the Event Manager sidebar, select "Data Sources" and then click on the "Settings" tab.



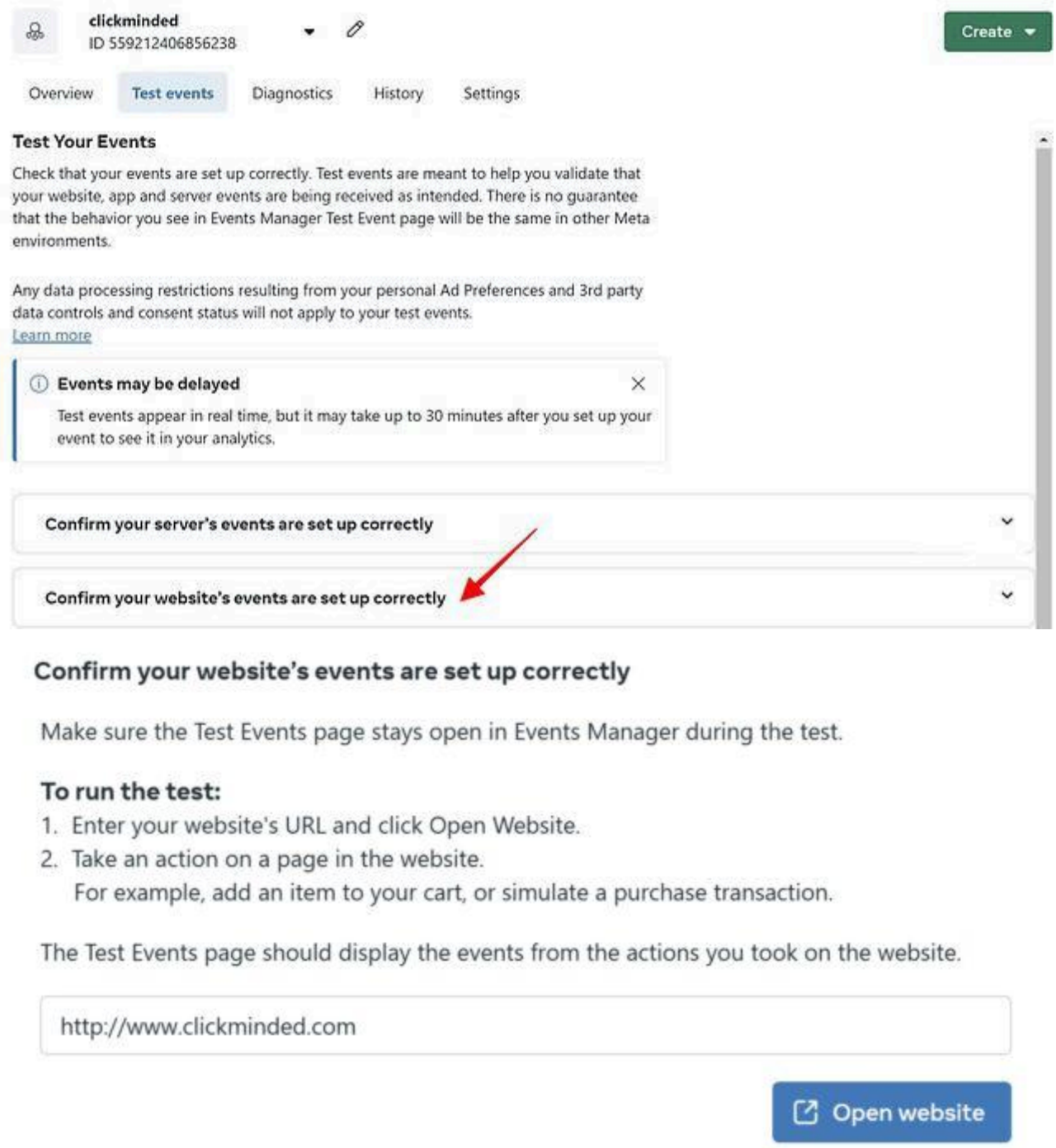
04▸ Next, scroll down to click "Open event setup tool".



05▸ Enter your website URL and hit "Open Website". This will tell you if your Meta Pixel was set up properly. To move on, it is recommended to test the events that are happening on your website in real time. Click "Test Events in Events Manager".



06▸ By now, you will be directed to the "Test events" tab. Scroll down and click "Confirm your website's events are set up correctly" and follow the instructions. It may take up to 30 minutes to see if the events are happening or appearing in your analytics.



Check if conversions are being tracked properly

Note: This step requires the Meta Pixel Helper Chrome Extension to be installed on Google Chrome.

01▸ Open your website using Chrome.

02▸ Perform the action you want to check if it is being tracked. (e.g. submitting a form, adding a product to a cart, etc.)

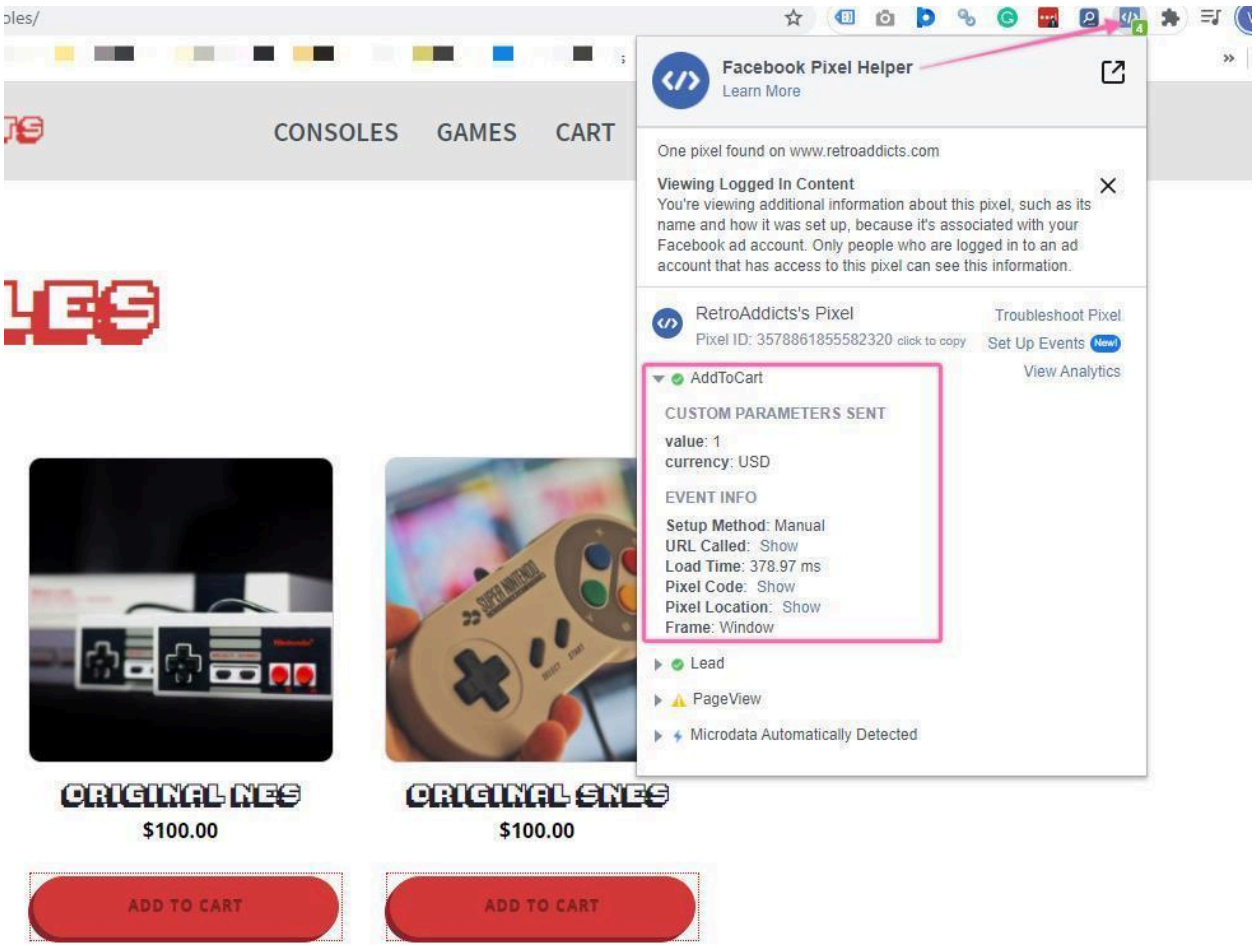
03▸ Click on the Meta Pixel Helper Chrome extension.

04▸ You should be able to see the name of the conversion that you are tracking, which should appear on the list. Clicking on it will show the conversion parameters. These will be set if they were configured when setting up the event.

Note: If you're tracking a button click, you might need to press and hold the Ctrl key (or Cmd ⌘ if you use a Mac) when you click on it. This will ensure the link is opened in a new tab. Therefore, the page will not refresh, potentially missing the opportunity to see the event being tracked.

Example for a button click:

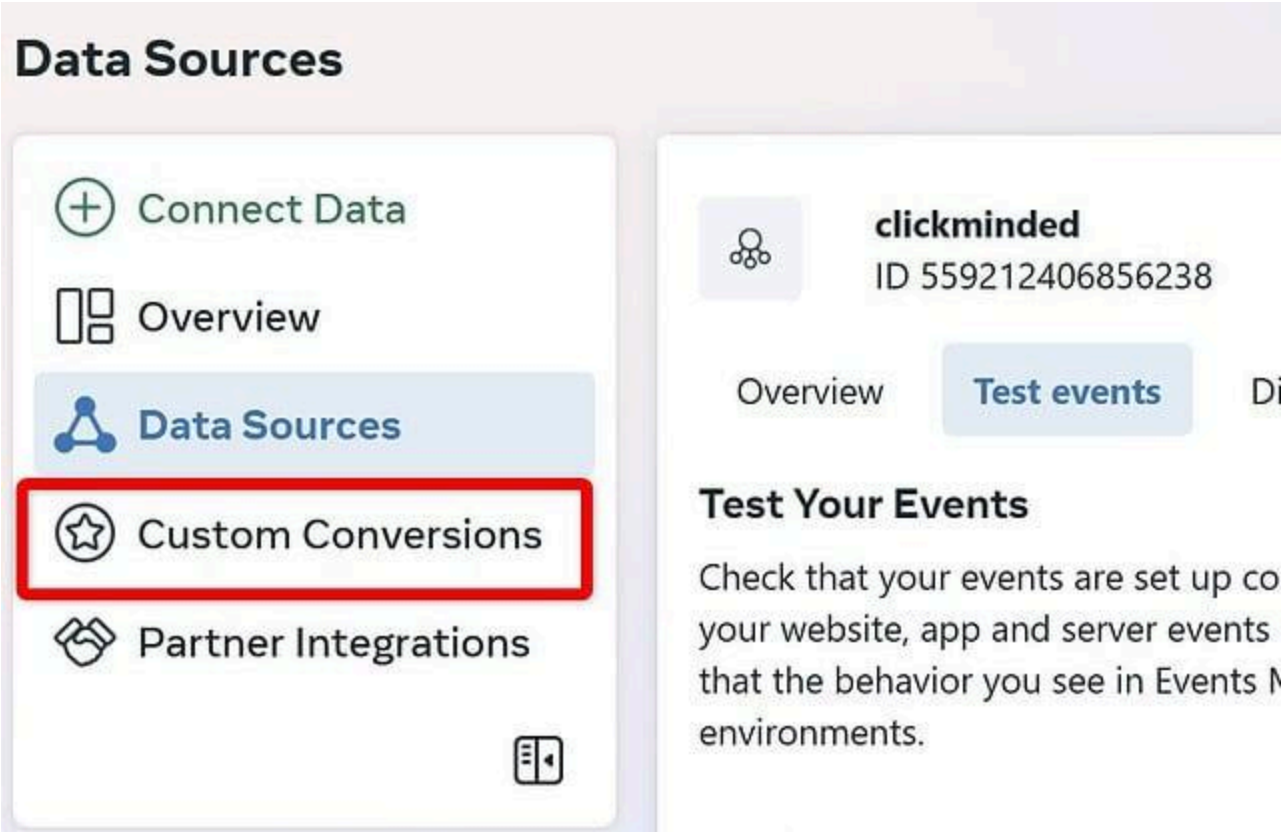
- Go to the page where the button is.
- Press and hold the Ctrl key (or Cmd ⌘ if you use a Mac) and click the button you want to test.
- Click on the Meta Pixel Helper Extension and you should see the event you chose to fire.



05▸ After you've verified that your conversion is tracked successfully, you'll need to jump to "Setting up conversion tracking with Meta Business Manager" in this SOP.

Using Meta custom conversions to track a lead sign-up

01▸ In the Meta Event Manager panel, click "Custom Conversions" on your left sidebar.



02▸ Click the “Create custom conversion” button.



Get Started With Custom Conversions

Use custom conversions to measure the outcomes that matter to your business and optimize your ads for URL traffic and custom events. Learn more

Create custom conversion

Measure
Use custom conversions to measure the interactions that matter to your business. These can be used to help create custom audiences to use in your ads.

Optimize
Use custom conversions to show ads to people who are most likely to take specific actions. You can map your custom events to standard events and use them to optimize your ad delivery.

Share
Collaborate on a campaign by sharing custom conversions with other ad or business accounts on Facebook or with third-party agencies.

03▸ You should now be able to set up all the information regarding what you want to track. Make sure you have selected the correct pixel to work with. The options to be configured here will depend on what you want to track:

- **Name:** Try not to make this too long. It should be evident what this conversion is about. (e.g. Trial Lead)
- **Description (optional):** Add more information about this conversion if it is unclear in the name.

Remember: You will want anyone to understand what the conversions are about. You might want to assign the ad account management to an employee or an agency. They should not be guessing what each conversion is.

- **Event:** Select the one that better fits your purpose. If it is not a lead or an add-to-cart, click “All URL Traffic”. We’ll select “Lead” for this SOP to track lead sign-ups.

Rule 1: Select [URL][contains] and type a specific part of your URL that will not be in any other page URLs.

E.g. If your URL is retroaddicts.com and your “Thank you” page is retroaddicts.com/thank-you-new-subscriber, you can use:

- retroaddicts.com/thank-you-new-subscriber, or
- /thank-you-new-subscriber

But if you have other URLs on your site that may contain that same text, do not use

that. For example,

- "Thank you" page: retroaddicts.com/thank-you-new-subscriber
- Another unrelated page for a different conversion: retroaddicts.com/thank-you-new-subscriber/unrelated_offer

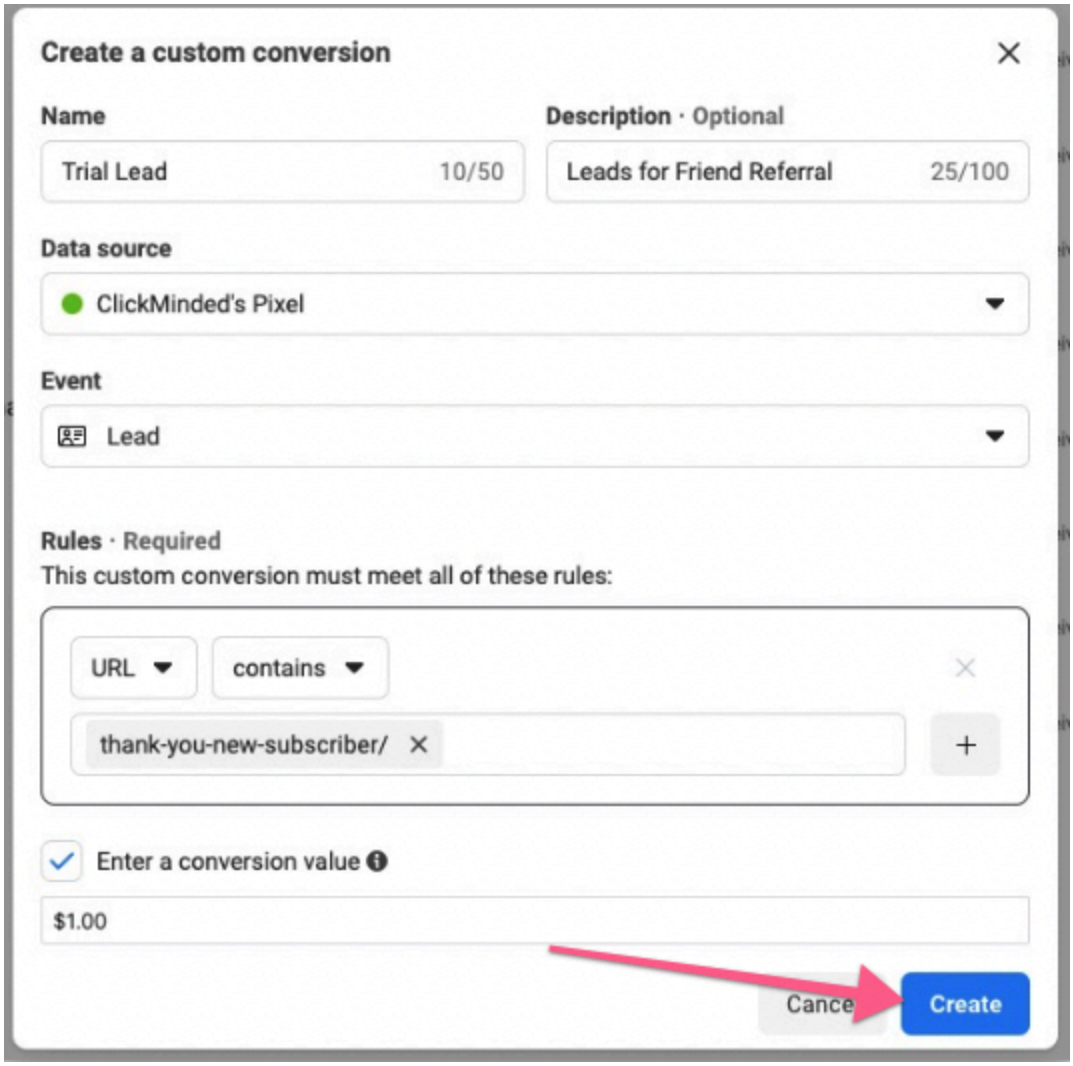
If you used [URL][contains][thank-you] for your rule, the second page will also count as a conversion since it also contains "/thank-you-new-subscriber."

If this is the case, consider:

- Using another part of the URL to create the rule.
- Editing the URL slug of your "thank you" page so that it is unique e.g. retroaddicts.com/thank-you-new-subscriber-199282jsn. In this case, you can use: [URL][contains][199282jsn].
- Using [URL][equals] instead of [URL][contains].

Note: If your website or any of your tools use dynamic parameters in the URL, your conversions will not be tracked.

- **Value (optional):** How much is this conversion worth to you? If you choose to input this field, you will be able to see it when analyzing campaigns, which efficiently optimizes your campaigns.

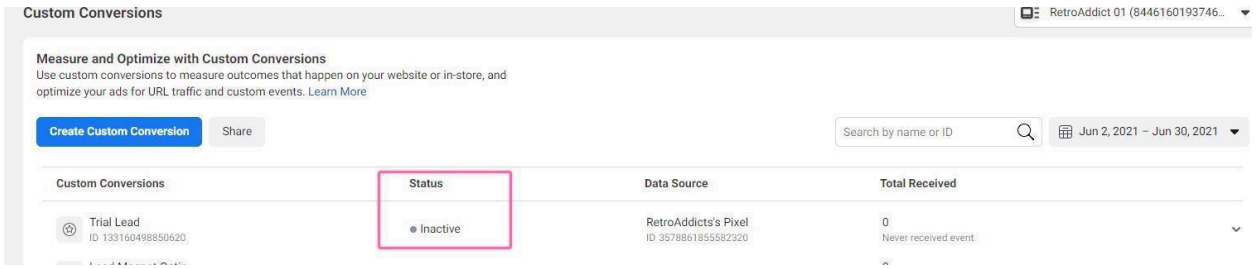


04▸ Click “Create” and your custom conversion is now created successfully.

05▸ You will see your new custom conversion on the list.

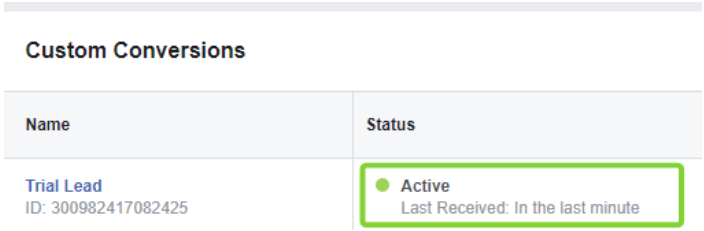
Seeing a green light and an “Active” status means someone browsing your website has already triggered the rule you created. If that is the case, your custom conversion should be correctly configured.

But in most cases, you will see an inactive status:



06▸ If that is the case, simply open a new tab on your browser and open your “Thank you” page or the conversion page you set up before.

07▸ Wait for 30 seconds. Go back to the Custom Conversion tab, refresh the page and re-check. You should now be able to see this message:



Once you’ve verified that your conversion is being tracked successfully, you'll need to jump to "Setting up conversion tracking with Meta Business Manager" in this SOP. That's it!