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Vibecoded Marketing Tool Integration Template

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Vibecoded marketing tool integration template

Connecting your custom-built marketing solutions to legacy systems

Project Name:

Tool Creator/Owner:

Date Created:

Integration Status: [ ] Planning [ ] In Progress [ ] Testing [ ] Live

Section 1: Your vibecoded tool overview

1.1. What did you build?

Tool Name:

Tool Type:
[ ] Custom Website/Landing Page
[ ] ROI Calculator
[ ] Interactive Quiz/Assessment Tool
[ ] Campaign Tracking Dashboard
[ ] Lead Scoring Calculator
[ ] Pricing Calculator
[ ] Product Configurator

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[ ] Content Recommendation Engine
[ ] Attribution Dashboard
[ ] Email Campaign Builder
[ ] A/B Test Manager
[ ] Customer Segmentation Tool
[ ] Conversion Funnel Visualizer
[ ] Other:

Primary Purpose:____

Built Using:
[ ] Claude (Anthropic) - AI-assisted development
[ ] ChatGPT - AI-assisted development
[ ] Webflow
[ ] Bubble.io
[ ] Custom HTML/CSS/JavaScript
[ ] React/Next.js
[ ] Cursor
[ ] Lovable
[ ] No-code platform:

[ ] Other:

Where Is It Hosted:
[ ] Vercel
[ ] Netlify
[ ] AWS (S3, CloudFront, Lambda)
[ ] GitHub Pages
[ ] Your own server
[ ] Webflow hosting
[ ] Other:

URL/Access Point:

Who Uses This Tool:
[ ] Website visitors (public)
[ ] Leads/prospects
[ ] Existing customers
[ ] Internal team only
[ ] Sales team
[ ] Partners/resellers

1.2. What data does your tool collect?

Contact Information:
[ ] Email address
[ ] First name
[ ] Last name
[ ] Phone number
[ ] Company name
[ ] Job title
[ ] Industry
[ ] Company size
[ ] Other:

Behavioral Data:
[ ] Pages viewed
[ ] Time spent on tool
[ ] Inputs entered (calculator values, quiz answers, etc.)
[ ] Results generated
[ ] Downloads/exports
[ ] Share actions
[ ] Return visits
[ ] Completion rate
[ ] Drop-off points
[ ] Other:

Campaign/Source Data:
[ ] UTM parameters (source, medium, campaign, content, term)
[ ] Referrer URL
[ ] Ad click ID (GCLID, FBCLID, etc.)
[ ] Landing page variant
[ ] A/B test version
[ ] Other:

Calculated/Derived Data:
[ ] Lead score
[ ] Engagement score
[ ] ROI calculation results
[ ] Recommendation/outcome
[ ] Qualification status
[ ] Intent signal strength
[ ] Other:

1.3. What do you want to happen with this data?

Primary Goals (check all that apply):
[ ] Add new leads to CRM automatically
[ ] Update existing contact records with new data
[ ] Trigger email nurture sequences
[ ] Notify sales team of hot leads
[ ] Track conversions in analytics
[ ] Build custom audiences for retargeting
[ ] Measure campaign ROI
[ ] Enrich contact profiles with behavioral data
[ ] Score leads based on tool usage
[ ] Create reports/dashboards
[ ] Sync data to data warehouse
[ ] Other:

Describe Your Ideal Outcome:
"When someone uses my tool, I want

____

____

____

____
to happen automatically."

Section 2: Legacy systems to connect

2.1. Your existing marketing tech stack

CRM System:
System Name: [ ] Salesforce [ ] HubSpot [ ] Pipedrive [ ] Zoho
[ ] Other: ____________________
Access Level: [ ] Admin [ ] User [ ] Need to Request
API Access: [ ] Yes [ ] No [ ] Don't Know
Current Data Entry Method: [ ] Manual [ ] Import [ ] Existing Integration

Marketing Automation:
System Name: [ ] Marketo [ ] Pardot [ ] HubSpot [ ] ActiveCampaign
[ ] Mailchimp [ ] Klaviyo [ ] Other: ____________________
Access Level: [ ] Admin [ ] User [ ] Need to Request
API Access: [ ] Yes [ ] No [ ] Don't Know
Forms Currently Used: [ ] Platform Forms [ ] External Forms [ ] Both

Content Management System (CMS):
System Name: [ ] WordPress [ ] Webflow [ ] Contentful [ ] Drupal
[ ] Sitecore [ ] Other: ____________________
Access Level: [ ] Admin [ ] User [ ] Need to Request
Current Integration Points: ____________________

Analytics Platform:
System Name: [ ] Google Analytics 4 [ ] Adobe Analytics [ ] Mixpanel
[ ] Amplitude [ ] Other: ________________________
Tracking Implemented: [ ] Yes [ ] Partially [ ] No
GA4 Property ID (if applicable):
____
Conversion Events Tracked:
____

Customer Data Platform (CDP):
System Name: [ ] Segment [ ] mParticle [ ] Tealium [ ] Adobe CDP
[ ] Other:
____
[ ] We don't have a CDP
Access Level: [ ] Admin [ ] User [ ] Need to Request

Social Media/Advertising:
Platforms: [ ] Facebook Ads [ ] LinkedIn Ads [ ] Google Ads [ ] Twitter Ads
Pixel/Conversion Tracking: [ ] Installed [ ] Not Installed [ ] Don't Know
Conversion Events:
____

E-commerce Platform (if applicable):
System Name: [ ] Shopify [ ] Magento [ ] BigCommerce [ ] WooCommerce
[ ] Other:
____
Customer Data Sync: [ ] Yes [ ] No

Event Management (if applicable):
System Name: [ ] Zoom [ ] ON24 [ ] Cvent [ ] Bizzabo [ ] Eventbrite
[ ] Other:
____

2.2. Integration priorities

Rank your integration needs (1 = highest priority):

____ Connect to CRM (create/update contacts)
____ Trigger marketing automation workflows
____ Track in analytics platform
____ Send data to CDP
____ Notify sales team
____ Update advertising pixels
____ Sync with e-commerce platform
____ Build reporting dashboard
____ Other: ____

Section 3: Technical assessment of your vibecoded tool

3.1. Current technical capabilities

Does your tool currently have:

Form Submission Capability:
[ ] Yes, it collects data via forms
[ ] No, it's purely informational
[ ] It has interactive elements but no forms

Can you edit the code:
[ ] Yes, I have full access to source code
[ ] Partially, I can add custom code snippets
[ ] No, it's a no-code platform with limited customization
[ ] I can ask the AI to regenerate it with changes

Can you add JavaScript tracking codes:
[ ] Yes, anywhere in the code
[ ] Yes, only in header/footer sections
[ ] Limited, only through platform settings
[ ] No, not possible

Can you configure webhooks to send data:
[ ] Yes, I know how to set this up
[ ] Maybe, if someone shows me how
[ ] No, would need help
[ ] Not sure what webhooks are

Does your tool store data:
[ ] Yes, in a database: ____
[ ] Yes, in browser localStorage/cookies
[ ] No, it just displays and submits
[ ] Data is sent directly to external systems

Current data flow:
User Interaction → [What happens now?] →

____

____

3.2. Integration readiness checklist

Technical Prerequisites:
[ ] I can access and edit the tool's code
[ ] I can add custom JavaScript snippets
[ ] I can configure form submission handlers
[ ] I can test changes without breaking production
[ ] I have a development/test version of the tool
[ ] I can add hidden form fields
[ ] I can capture URL parameters (UTMs)
[ ] I can make API calls from my tool

Access Prerequisites:
[ ] I have API credentials for my CRM
[ ] I have API credentials for marketing automation
[ ] I have access to analytics admin
[ ] I have budget for integration tools (if needed)
[ ] I have IT/developer support available (if needed)

Knowledge Prerequisites:
[ ] I understand basic HTML forms
[ ] I understand what an API is
[ ] I know how to use browser developer tools
[ ] I understand cookies and tracking
[ ] I can follow technical documentation
[ ] I'm comfortable testing and troubleshooting

Section 4: Integration strategy selection

4.1. Choose your integration approach

Based on your technical comfort and tool capabilities, select an approach:

OPTION A: DIRECT API INTEGRATION (Most Reliable, Requires Coding)
Best if:
- You have coding skills or developer support
- You want real-time, reliable data transfer
- You need custom logic and transformations
- Your tool is custom-built with code access

Difficulty: Advanced
Cost: Free to $50/month for hosting
Control: Maximum

OPTION B: NO-CODE INTEGRATION PLATFORM (Easiest, Most Flexible)
Best if:
- You're non-technical
- You want to connect multiple systems
- You need to iterate quickly
- You can allocate budget ($20-200/month)

Tools: Zapier, Make (Integromat), Tray.io
Difficulty: Beginner-friendly
Cost: $20-200/month
Control: Medium-High

OPTION C: CUSTOMER DATA PLATFORM (Most Scalable, Higher Cost)
Best if:
- You're tracking across many tools
- You need unified customer profiles
- You have significant traffic/data volume
- You have budget ($100-1000+/month)

Tools: Segment, mParticle, RudderStack
Difficulty: Intermediate
Cost: $100-1000+/month
Control: High

OPTION D: FORM EMBEDDING + NATIVE INTEGRATIONS (Simplest, Limited)
Best if:
- Your tool is mainly a form
- Your CRM/MA has form builder
- You want minimal technical work
- Limited customization is acceptable

Difficulty: Very Easy
Cost: Free
Control: Limited

OPTION E: HYBRID APPROACH (Recommended for Most)
Best if:
- You want balance of ease and power
- You'll use mix of native + third-party tools
- You want to start simple, scale later

Example: Forms → Zapier → CRM + Analytics tracking via direct integration
Difficulty: Beginner-Intermediate
Cost: $20-100/month
Control: Medium-High

My Selected Approach:

____

Why I chose this:

____

Section 5: Step-by-step integration plan

5.1. Pre-integration setup

STEP 1: BACKUP YOUR VIBECODED TOOL
[ ] Download complete source code
[ ] Export any configuration settings
[ ] Take screenshots of current functionality
[ ] Document current user flow
[ ] Save current version URL:

Backup Location:

Date Backed Up:

STEP 2: CREATE TEST ENVIRONMENT
[ ] Set up development/staging version of tool
[ ] Create test contact in CRM (test@yourdomain.com)
[ ] Set up test email address for notifications
[ ] Prepare test data for submissions
Test Environment URL:

STEP 3: GATHER API CREDENTIALS & ACCESS

CRM API Setup:
[ ] Located API documentation:

[ ] Generated API key/token:

[ ] Noted API rate limits:

[ ] Tested API connection with simple call
Credentials stored in:

Marketing Automation API Setup:
[ ] Located API documentation:

[ ] Generated API key/token:

[ ] Noted API rate limits:

[ ] Tested API connection
Credentials stored in:

Analytics Setup:
[ ] Located Measurement ID or Tracking ID:

[ ] Set up custom events (if needed):

[ ] Created conversions:

Integration Platform Setup (if using):
[ ] Created account on:

[ ] Connected to CRM:

[ ] Connected to Marketing Automation:

[ ] Connected to Analytics:

5.2. Data flow design

Map out exactly what happens when someone uses your tool:

USER ACTION → DATA CAPTURED → WHERE IT GOES → WHAT HAPPENS NEXT

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Example Flow:
1. User lands on calculator
→ Capture: Page view, UTM params, referrer
→ Send to: Google Analytics
→ Result: Pageview event tracked

2. User enters email + inputs
→ Capture: Email, name, input values, calculated result
→ Send to: CRM via Zapier
→ Result: New contact created with custom fields

3. User submits form
→ Capture: Submission timestamp, all form data
→ Send to: Marketing Automation
→ Result: Added to email nurture sequence

Your Flow:

1. User lands on your tool
→ Capture: ____

→ Send to: ____

→ Result: ____

2. User interacts with tool
→ Capture: ____

→ Send to: ____

→ Result: ____

3. User submits/completes
→ Capture: ____

→ Send to: ____

→ Result: ____

4. Follow-up actions
→ Capture: ____

→ Send to: ____

→ Result: ____

5.3. Field mapping worksheet

Map your tool's data fields to your CRM/Marketing Automation fields:

Your tool field	CRM field name	Marketing auto fiel	Required
›	›	›	☐ Yes ☐ No
›	›	›	☐ Yes ☐ No
›	›	›	☐ Yes ☐ No
›	›	›	☐ Yes ☐ No
›	›	›	☐ Yes ☐ No

Custom/Calculated Fields to Create:

Field Name: ____
Field Type: [ ] Text [ ] Number [ ] Date [ ] Picklist [ ] URL [ ] Boolean
Purpose: ____
Example Value: ____
Create in: [ ] CRM [ ] Marketing Automation [ ] Both

Custom/Calculated Fields to Create:

Field Name: ____
Field Type: [ ] Text [ ] Number [ ] Date [ ] Picklist [ ] URL [ ] Boolean
Purpose: ____
Example Value: ____
Create in: [ ] CRM [ ] Marketing Automation [ ] Both

Custom/Calculated Fields to Create:

Field Name: ____
Field Type: [ ] Text [ ] Number [ ] Date [ ] Picklist [ ] URL [ ] Boolean
Purpose: ____
Example Value: ____
Create in: [ ] CRM [ ] Marketing Automation [ ] Both

As many as needed.

5.4. Tracking code implementation

GOOGLE ANALYTICS 4 SETUP:

Step 1: Add GA4 Base Tracking
[ ] Install GA4 config tag in <head> section
[ ] Test pageview tracking working

Code to add:

```
<!– Google tag (gtag.js) –>
<script async
src="https://www.googletagmanager.com/gtag/js?id=G-XXXXXXXXXX">
</script>
<script>
 window.dataLayer = window.dataLayer II [];
 function gtag(){dataLayer.push(arguments);}
 gtag('js', new Date());
 gtag('config', 'G-XXXXXXXXXX');
</script>
```

Your GA4 Measurement ID: ____

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Step 2: Add Custom Event Tracking
Events to track:
Event Name: calculator_started

When: ____

Parameters: ____

Event Name: calculator_completed

When: ____

Parameters: ____

Event Name: form_submitted

When: ____

Parameters: ____

Code example:
```
gtag('event', 'calculator_completed', {
 'result_value': calculatedValue,
 'user_input': userInput,
 'timestamp': new Date().toISOString()
});
```

FACEBOOK PIXEL SETUP (if applicable):

[ ] Install base pixel code
[ ] Configure custom conversion events

Your Pixel ID: ______________________________________

Events to track:
[ ] PageView (automatic)
[ ] ViewContent (when: ________________________________)

[ ] Lead (when: ____)

[ ] CompleteRegistration (when: ______________________________)

LINKEDIN INSIGHT TAG SETUP (if applicable):

[ ] Install partner ID tag
[ ] Set up conversion tracking

Your Partner ID:

____

5.5 FORM/DATA CAPTURE IMPLEMENTATION

FORM SETUP:

Form Fields to Include:
Visible Fields:
[ ] Email (required)
[ ] First Name
[ ] Last Name
[ ] Company
[ ] Phone
[ ] Job Title
[ ] Other: ____

Hidden Fields (auto-populated):
[ ] utm_source
[ ] utm_medium
[ ] utm_campaign
[ ] utm_content
[ ] utm_term
[ ] referrer_url
[ ] landing_page
[ ] tool_result (calculated value)

[ ] timestamp
[ ] lead_score (if applicable)
[ ] Other: ____

Form Submission Endpoint:
[ ] Direct to CRM API
[ ] To integration platform (Zapier webhook):____________________
[ ] To own database/server: ________________________________
[ ] Multiple destinations

CAPTURING URL PARAMETERS:

Code to capture UTM parameters:

```
// Get UTM parameters from URL and store
function getUrlParameter(name) {
 name = name.replace(/[\[]/, '\\[').replace(/[\]]/, '\\]');
 var regex = new RegExp('[\\?&]' + name + '=([^&#]*)');
 var results = regex.exec(location.search);
 return results === null ? '' :
decodeURIComponent(results[1].replace(/\+/g, ' '));
}

// Store in hidden form fields or localStorage
document.getElementById('utm_source').value =
getUrlParameter('utm_source');
document.getElementById('utm_medium').value =
getUrlParameter('utm_medium');
document.getElementById('utm_campaign').value =
getUrlParameter('utm_campaign');
```

[ ] Code added to your tool
[ ] Tested with sample UTM parameters

Section 6: Integration implementation

6.1. Option A : Zapier / Make integration (no-code)

ZAPIER SETUP STEPS:

Step 1: Create Zap
[ ] Log into Zapier
[ ] Click "Create Zap"
Zap Name: ____

Step 2: Configure Trigger
Trigger App: [ ] Webhooks by Zapier [ ] Email Parser [ ] Google Forms
[ ] Other: ____
Trigger Event: [ ] Catch Hook [ ] New Email [ ] New Form Response
Webhook URL (if applicable): ______________________________
[ ] Copied webhook URL to clipboard

Step 3: Connect Form to Zapier
In your tool's form submission code, add:

```
// Send data to Zapier webhook
fetch('YOUR_ZAPIER_WEBHOOK_URL', {
 method: 'POST',
 headers: { 'Content-Type': 'application/json' },
 body: JSON.stringify({
  email: email,
  firstName: firstName,
  lastName: lastName,
  company: company,
  toolResult: calculatedValue,
  utmSource: utmSource,
  // ... other fields
 })
});
```

[ ] Code added and tested

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Step 4: Test Trigger
[ ] Submitted test form
[ ] Confirmed Zapier received data

Test data received: ______________________________

Step 5: Add Filter (Optional)

Filter Condition: ______________________________
Example: Only continue if email doesn't contain "test"
[ ] Filter configured

Step 6: Configure CRM Action
Action App: [ ] Salesforce [ ] HubSpot [ ] Pipedrive

[ ] Other: ______________
Action Event: [ ] Create/Update Contact [ ] Create Lead [ ] Create Deal
Field Mapping:

Zapier Field	→ CRM Field
______________	______________
______________	______________
______________	______________
______________	______________
______________	______________

[ ] All fields mapped correctly
[ ] Tested with sample data
[ ] Verified contact created in CRM

Step 7: Add Marketing Automation Action
Action App: [ ] Marketo [ ] ActiveCampaign [ ] Mailchimp

[ ] Other: _________
Action Event: [ ] Add to List [ ] Start Automation [ ] Update Contact

Configuration: ______________________________
[ ] Configured and tested

Step 8: Add Analytics Event (Optional)
Using Zapier's Google Analytics integration or custom webhook
[ ] Configured analytics event

Event details: ______________________________

Step 9: Add Notifications
Action App: [ ] Email [ ] Slack [ ] SMS

[ ] Other: ______________________________

Who to notify: ______________________________

Condition: ______________________________
[ ] Notification configured

Step 10: Turn On Zap
[ ] Reviewed all steps
[ ] Performed end-to-end test
[ ] Zap turned ON
[ ] Monitoring for errors

MAKE (INTEGROMAT) ALTERNATIVE:

Similar process but with visual scenario builder
[ ] Created scenario
[ ] Added modules
[ ] Connected services
[ ] Tested scenario
[ ] Activated

Scenario URL: ______________________________

6.2. Option B : Direct API integration (code)

CRM API INTEGRATION CODE:

Platform: [ ] Salesforce [ ] HubSpot [ ] Pipedrive

[ ] Other: ______________________________

Example JavaScript Code:

```
// Form submission handler
async function handleFormSubmit(formData) {
 try {
  // 1. Create contact in CRM
  const crmResponse = await fetch('YOUR_CRM_API_ENDPOINT', {
   method: 'POST',
   headers: {
    'Authorization': 'Bearer YOUR_API_KEY',
    'Content-Type': 'application/json'
   },
   body: JSON.stringify({
    email: formData.email,
    firstName: formData.firstName,
    lastName: formData.lastName,
    properties: {
     company: formData.company,
     custom_field: formData.calculatedValue
    }
   })
  });

  if (!crmResponse.ok) {
   throw new Error('CRM API error');
  }

  // 2. Track in analytics
  gtag('event', 'lead_submitted', {
   'value': formData.calculatedValue
  });

  // 3. Show success message
  showSuccessMessage();

 } catch (error) {
  console.error('Integration error:', error);
  // Show error message to user
  // Log to error tracking service
 }
}
```

Implementation Checklist:
[ ] API endpoint identified
[ ] Authentication configured
[ ] Error handling implemented
[ ] Success/failure messages added
[ ] Tested with valid data
[ ] Tested with invalid data
[ ] Deployed to production

SERVER-SIDE INTEGRATION (if needed):

For secure API key handling, use serverless function:

Platform: [ ] Vercel [ ] Netlify [ ] AWS Lambda

[ ] Other:___________________________

Example Serverless Function:

```
// api/submit-lead.js (Vercel/Netlify)
export default async function handler(req, res) {
 const { email, firstName, lastName, ...otherData } = req.body;

 // Call CRM API securely (API key is in environment variables)
 const response = await fetch(process.env.CRM_API_URL, {
  method: 'POST',
  headers: {
   'Authorization': `Bearer ${process.env.CRM_API_KEY}`,
   'Content-Type': 'application/json'
  },
  body: JSON.stringify({ email, firstName, lastName, ...otherData })
 });

 return res.status(200).json({ success: true });
}
```

Implementation Checklist:
[ ] API endpoint identified
[ ] Authentication configured
[ ] Error handling implemented
[ ] Success/failure messages added
[ ] Tested with valid data
[ ] Tested with invalid data
[ ] Deployed to production

SERVER-SIDE INTEGRATION (if needed):

For secure API key handling, use serverless function:

Platform: [ ] Vercel [ ] Netlify [ ] AWS Lambda

[ ] Other:____

Example Serverless Function:

```
// api/submit-lead.js (Vercel/Netlify)
export default async function handler(req, res) {
  const { email, firstName, lastName, ...otherData } = req.body;

  // Call CRM API securely (API key is in environment variables)
  const response = await fetch(process.env.CRM_API_URL, {
    method: 'POST',
    headers: {
      'Authorization': `Bearer ${process.env.CRM_API_KEY}`,
      'Content-Type': 'application/json'
    },
    body: JSON.stringify({ email, firstName, lastName, ...otherData })
  });

  return res.status(200).json({ success: true });
}
```

[ ] Serverless function created
[ ] Environment variables configured
[ ] Function deployed
[ ] Tested from frontend

6.2. Option C : CDP integration (segment)

SEGMENT SETUP:

Step 1: Create Segment Account & Source
[ ] Signed up for Segment
[ ] Created JavaScript source

Write Key: ______________________________

Step 2: Install Segment Snippet
[ ] Added analytics.js snippet to tool
Code:
```
<script>
 !function(){var analytics=window.analytics=window.analytics||[];
 // ... Segment snippet
 analytics.load("YOUR_WRITE_KEY");
 analytics.page();
}();
</script>
```

Step 3: Track Page Views
[ ] Page calls automatically tracking
[ ] Custom page properties added if needed

Step 4: Identify Users
Code to add on form submission:
```
analytics.identify('user-email@example.com', {
 email: 'user-email@example.com',
 firstName: 'John',
 lastName: 'Doe',
 company: 'Acme Inc',
 calculatorResult: 'value'
});
```
[ ] Identify calls implemented

Step 5: Track Events

```
analytics.track('Calculator Completed', {
  result: calculatedValue,
  inputs: userInputs,
  timestamp: new Date()
});
```

Events tracking:
[ ] Tool started
[ ] Tool completed
[ ] Form submitted
[ ] Custom event: ________________________________

Step 6: Configure Destinations
Destinations to enable:

[ ] CRM: ________________________________

[ ] Marketing Automation: ________________________________

[ ] Analytics: ________________________________

[ ] Data Warehouse: ________________________________

[ ] Each destination configured with field mappings

Step 7: Test Integration
[ ] Segment debugger shows events
[ ] Events flowing to destinations
[ ] Field mapping verified in each destination

Section 7: Testing and validation

7.1. Pre-launch testing checklist

FUNCTIONAL TESTING:

Test 1: New Contact Creation
[ ] Submitted form with new email
[ ] Verified contact created in CRM
[ ] Verified all fields populated correctly
[ ] Verified contact added to marketing automation

Expected Result: ______________________________

Actual Result:

____

Status: [ ] Pass [ ] Fail

Test 2: Existing Contact Update
[ ] Submitted form with existing email
[ ] Verified contact updated (not duplicated)
[ ] Verified new data appended/updated correctly

Expected Result: ______________________________

Actual Result:

____

Status: [ ] Pass [ ] Fail

Test 3: Analytics Tracking
[ ] Submitted form
[ ] Checked Google Analytics real-time reports
[ ] Verified custom events firing
[ ] Verified correct parameters captured

Expected Result: ______________________________

Actual Result: ______________________________
Status: [ ] Pass [ ] Fail

Test 4: Marketing Automation Workflow
[ ] Submitted form
[ ] Verified automation/workflow triggered
[ ] Received expected email (if applicable)
[ ] Checked contact added to correct list/segment

Expected Result: ______________________________

Actual Result:

____

Status: [ ] Pass [ ] Fail

Test 5: Sales Notification
[ ] Submitted high-value lead
[ ] Verified sales team received notification
[ ] Notification contained correct information

Expected Result: ______________________________

Actual Result:

____

Status: [ ] Pass [ ] Fail

EDGE CASE TESTING:

Test 6: Invalid Email Format
[ ] Submitted form with invalid email (test@test)
[ ] Verified validation error shown
[ ] Verified no bad data sent to systems
Status: [ ] Pass [ ] Fail

Test 7: Missing Required Fields
[ ] Submitted form with missing required field
[ ] Verified validation error shown
Status: [ ] Pass [ ] Fail

Test 8: Special Characters
[ ] Submitted form with special characters (é, ñ, etc.)
[ ] Verified data stored correctly
Status: [ ] Pass [ ] Fail

Test 9: Very Long Input
[ ] Submitted form with 500+ character input
[ ] Verified system handled appropriately
Status: [ ] Pass [ ] Fail

Test 10: Duplicate Rapid Submissions
[ ] Submitted same form twice quickly
[ ] Verified deduplication working
Status: [ ] Pass [ ] Fail

UTM TRACKING TESTING:

Test 11: UTM Parameters
[ ] Visited tool with UTM parameters: ?utm_source=linkedin&utm_medium=cpc&utm_campaign=test
[ ] Submitted form
[ ] Verified UTMs saved in CRM
UTM values in CRM:

Source: ____

Medium: ____

Campaign: ____
Status: [ ] Pass [ ] Fail

ERROR HANDLING TESTING:

Test 12: API Down Scenario
[ ] Temporarily disabled integration/changed API key
[ ] Submitted form
[ ] Verified user-friendly error message shown
[ ] Verified user's data not lost

Error Message Shown: _________________________________
Status: [ ] Pass [ ] Fail

Test 13: Network Timeout
[ ] Simulated slow network (throttle in browser dev tools)
[ ] Submitted form
[ ] Verified timeout handled gracefully
Status: [ ] Pass [ ] Fail

7.2. User acceptance testing

User Testing Participants:

Name: ______________________ Role: ________________________

Name: ______________________ Role: ________________________

Name: ______________________ Role: ________________________

UAT Scenarios:

Scenario 1: ____

Expected User Experience: __________________________________

Actual User Experience: _____________________________________

Feedback: ____

Status: [ ] Approved [ ] Changes Needed

Scenario 2:
____

Expected User Experience: __________________________________

Actual User Experience: _____________________________________

Feedback: ____

Status: [ ] Approved [ ] Changes Needed

7.3. Data quality validation

Sample Data Check:
[ ] Pulled 10 recent contact records from CRM
[ ] Verified all expected fields populated
[ ] Verified data accuracy (no truncation, corruption)
[ ] Verified timestamps correct
[ ] Verified source attribution correct

Issues Found:

Resolution:

Section 8: Launch and monitoring

8.1. Pre-launch checklist

[ ] All tests passing
[ ] Team trained on new data flow
[ ] Documentation completed
[ ] Monitoring/alerts configured
[ ] Backup plan documented
[ ] Stakeholders notified of launch
[ ] Support team briefed on potential issues
[ ] FAQ/troubleshooting guide created

Launch Date: ____

Launch Time: ____

8.2. Launch day checklist

Hour 1:
[ ] Turned on integration
[ ] Submitted test transaction
[ ] Verified end-to-end flow working
[ ] Monitoring dashboard active

Hour 4:
[ ] Checked error logs
[ ] Verified multiple transactions processed
[ ] Confirmed no user complaints
[ ] Data quality spot check

Day 1 End:
[ ] Reviewed all day's transactions
[ ] Calculated success rate: __________%
[ ] Logged any issues
[ ] Updated team

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8.3. Monitoring setup

Metrics to Monitor Daily:

Integration Health:
- Total submissions: __________
- Successful syncs: __________
- Failed syncs: __________
- Success rate: __________%

Error Tracking:
Error Monitoring Tool: [ ] Sentry [ ] Rollbar [ ] CloudWatch

[ ] Other: ____
[ ] Alerts configured for errors

Alert Recipient: ____

Dashboard Setup:
[ ] Created monitoring dashboard
Tool: [ ] Google Data Studio [ ] Tableau [ ] Built into platform

Dashboard URL: ____

Key Metrics Displayed:
- Submissions over time
- Success/failure rate
- Average processing time
- Most common errors
- Top traffic sources (UTM)

8.4. Alert configuration

Critical Alerts (Immediate Action):
Alert: Integration completely down
Condition: Zero submissions processed in 1 hour

Notify: ____

Method: [ ] Email [ ] SMS [ ] Slack [ ] PagerDuty [ ] Other: _____________

Alert: High error rate
Condition: Error rate >10%

Notify: ______________________________
Method: [ ] Email [ ] SMS [ ] Slack

Warning Alerts (Review Within 24 Hours):
Alert: Moderate error rate
Condition: Error rate 5-10%

Notify: ______________________________

Alert: Submission volume spike
Condition: >200% normal volume

Notify: ______________________________

Section 9: Ongoing maintenance and optimization

9.1. Daily maintenance tasks

[ ] Check error logs
[ ] Review failed transactions
[ ] Verify integrations running
[ ] Monitor success rate

Time Required: __________ minutes/day

Assigned To: ______________________________

9.2. Weekly maintenance tasks

[ ] Data quality audit (spot check 20 records)
[ ] Review user feedback/issues
[ ] Check for duplicate contacts created
[ ] Analyze drop-off points in tool
[ ] Review UTM tracking accuracy

Time Required: __________ minutes/week

Assigned To: ______________________________

9.3. Monthly reviews

[ ] Full integration health review
[ ] Analyze conversion rates
[ ] Review campaign attribution data
[ ] Update field mappings if needed
[ ] Check for API changes/deprecations
[ ] Review costs vs. usage

Key Metrics to Review:
- Total submissions this month: __________
- Conversion rate: __________%
- Top traffic sources: ____
- Data quality score: __________%
- Cost per submission: $__________

Monthly Report Recipients: ____

9.4. Optimization opportunities

Identified Improvements:

Improvement 1: ____

Expected Impact: ____
Effort: [ ] Low [ ] Medium [ ] High
Priority: [ ] High [ ] Medium [ ] Low

Target Date: ____

Improvement 1: ____

Expected Impact: ____
Effort: [ ] Low [ ] Medium [ ] High
Priority: [ ] High [ ] Medium [ ] Low

Target Date: ____

Section 10: Troubleshooting guide

10.1. Common issues and solutions

ISSUE: Form submissions not reaching CRM
Symptoms: User submits form, sees success message, but contact not in CRM

Troubleshooting Steps:
[ ] Check integration platform logs (Zapier/Make)
[ ] Verify API credentials still valid
[ ] Check CRM API rate limits
[ ] Test with sample submission
[ ] Review error logs in code

Common Causes:
- API key expired or revoked
- CRM API rate limit exceeded
- Required field missing in payload
- Network connectivity issue
- Validation rule blocking in CRM

Solution: ____

____

____

ISSUE: Duplicate contacts being created
Symptoms: Same person submitted form multiple times, created multiple CRM records

Troubleshooting Steps:
[ ] Check CRM deduplication rules
[ ] Verify using "update or create" logic
[ ] Review matching criteria (email exact match)
[ ] Check for email format variations (capitals, spaces)

Solution: ____

____

____

ISSUE: UTM parameters not tracking
Symptoms: UTM fields in CRM are empty

Troubleshooting Steps:
[ ] Verify URL has UTM parameters when testing
[ ] Check if JavaScript capturing parameters correctly
[ ] Verify hidden form fields populated
[ ] Check field mapping in integration

Solution: ____

____

____

ISSUE: UTM parameters not tracking
Symptoms: Google Analytics not showing custom events

Troubleshooting Steps:
[ ] Check browser console for errors
[ ] Verify GA4 tag installed correctly
[ ] Test in GA4 DebugView
[ ] Check event naming (spaces, special characters)
[ ] Verify not blocked by ad blocker

Solution: ____

____

____

ISSUE: Marketing automation not triggering
Symptoms: Contact created but automation/workflow not starting

Troubleshooting Steps:
[ ] Check if contact meets workflow criteria
[ ] Verify workflow is active/published
[ ] Check for workflow limits (one-time only?)
[ ] Review delay settings
[ ] Verify list/segment membership

Solution: ____

____

____

10.2. Emergency contacts

Integration Platform Support:

Platform: ____

Support Email: ____

Support Phone: ____

Priority Support Number (if applicable): ______________________

CRM Support:

Vendor: ____

Support Email: ____

Support Phone: ____

Account Manager: ____

Marketing Automation Support:

Vendor: ____

Support Email: ____

Support Phone: _______________________________________

Internal Escalation:

Technical Lead: _______________________________________

Marketing Director: ___________________________________

IT Support: ____

10.3. Rollback plan

If Integration Needs to be Disabled:

IMMEDIATE STEPS:
1. Pause/disable integration in platform

Platform: ____

How to pause: ____

2. Update form to direct alternative
   Option A: Collect to spreadsheet temporarily
   Option B: Send email notifications to team
   Option C: Use platform's native forms temporarily

3. Notify stakeholders

Who: ____

Message template: ____________________________________

4. Estimate fix time and communicate

While integration is down: ____

____

DATA RECOVERY:
If submissions were lost during downtime:
[ ] Check integration platform logs/history
[ ] Export failed submissions
[ ] Manually import to CRM
[ ] Document what was recovered

Section 11: Documentation and handoff

11.1. Integration documentation

Document the following for future reference:

ARCHITECTURE DIAGRAM: [Draw or describe your data flow]

```
User Submits Form
    ↓
 Capture Data + UTMs
    ↓
  [Your Tool]
    ↓
 □□□□□□□□□□
 ↓    ↓
Zapier  Analytics
 ↓    ↓
 □□→ CRM
 □□→ Marketing Automation
 □□→ Notifications
```

Your documented flow: ____

____

FIELD MAPPING REFERENCE

Tool field	CRM field	Data Type	Transform
>			
>			
>			
>			
>			

INTEGRATION PLATFORM CONFIGURATION:

Platform: ____

Account Login: ____

Zap/Scenario Name: ____________________________________

Zap/Scenario URL: _____________________________________

Last Modified: ____

Step-by-Step Zap Configuration:

1. ____

2. ____

3. ____

API CREDENTIALS LOCATION:

CRM API Key stored in: ______________________________________

Marketing Automation API Key in: ______________________________

Other credentials: ____

CODE SNIPPETS ADDED:

Location 1: Form submission handler

File: ____

Lines: ____

Purpose: ____

Location 2: Analytics tracking

File: ____

Lines: ____

Purpose: ____

Location 3: UTM capture

File: ____

Lines: ____

Purpose: ____

11.2. Training materials

Created for Team:
[ ] How to monitor integration health
[ ] How to troubleshoot common issues
[ ] How to interpret new CRM data fields
[ ] How to use new dashboard
[ ] FAQ document

Training Session Scheduled:

Date: ____

Attendees: ____

Materials Location: ____________________________________

11.3. Handoff checklist

If transferring ownership to another team member:

[ ] Shared all credentials securely
[ ] Walked through architecture
[ ] Demonstrated monitoring dashboard
[ ] Reviewed troubleshooting guide
[ ] Granted necessary access/permissions
[ ] Scheduled check-in meeting for questions
[ ] Documented tribal knowledge

New Owner: ____

Handoff date: ____

Follow-up meeting: ____________________________________

Section 12: Success metrics and reporting

12.1. Integration success metrics

Technical Metrics:
- Uptime: Target: 99.5% | Actual: ________%
- Success Rate: Target: >95% | Actual: ________%
- Average Sync Time: Target: <30s | Actual: ________s
- Error Rate: Target: <5% | Actual: ________%

Business Metrics:
- Submissions per month: __________
- New contacts created: __________
- Existing contacts updated: __________
- Marketing workflows triggered: __________
- Sales notifications sent: __________
- Conversion rate (visitor to submission): ________%

12.2. ROI tracking

Time Saved:
Before: Manual data entry took ________ hours/week
After: Automated, saving ________ hours/week
Annual time savings: ________ hours × $_____/hour = $______________

Data Quality Improvement:
Before: ________% data accuracy / ________% missing fields
After: ________% data accuracy / ________% missing fields

Lead Response Time:
Before: ________ hours average
After: ________ minutes average

Impact: ____

Campaign Attribution:
Now tracking: [ ] First touch [ ] Last touch [ ] Multi-touch
Previously: [ ] No attribution [ ] Limited attribution
Value: Can now measure ROI on $______________ in ad spend

12.3. Monthly report template

Month: ____

Summary:
Total tool submissions: ____________________________________

New contacts created: _____________________________________

Existing contacts updated: _________________________________
Integration uptime: _______%
Error rate: ______%

Top Traffic Sources (UTM):

1. ____

2. ____

3. ____

Top Performing Campaigns:

1. ____

2. ____

3. ____

Issues & Resolutions:

____

____

Optimizations Implemented:

____

____

Next Month's Goals: ____________________________________

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Section 13: Compliance and data privacy

13.1. GDPR / privacy compliance

Consent Tracking:
[ ] Tool includes privacy policy link
[ ] Tool includes clear consent checkbox
[ ] Consent timestamp stored in CRM
[ ] Consent audit trail maintained

Privacy policy URL: ______________________________

Last updated: ______________________________

Data Processing:
[ ] Documented what data you collect
[ ] Documented why you collect it
[ ] Documented how long you keep it
[ ] Provided opt-out mechanism

Data Retention:
Active contacts: Keep for ________ years

Inactive contacts: Delete after ________ years

13.2. Data security

[ ] Form submits over HTTPS
[ ] API calls use HTTPS
[ ] API keys stored securely (not in frontend code)
[ ] No PII logged in error messages
[ ] Access to integration platform restricted
[ ] Regular security audits scheduled

Section 14: Scaling considerations

14.1. When to upgrade your integration

Current Monthly Volume: _______________ submissions

Integration Platform Tier: ____

Signs You Need to Upgrade:
[ ] Approaching plan limits
[ ] Need faster sync times
[ ] Need more complex logic
[ ] Need dedicated support
[ ] Need SLA guarantees
[ ] Need advanced features

Next Tier Up:

Platform: ____

Cost: $____________/month

Additional Features: ____

Upgrade Trigger: When volume reaches ___________ submissions/month

14.2. Future enhancements

Planned for Next Quarter:

Enhancement 1: ____

Timeline: ____

Resources Needed: ____

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Enhancement 2: ___

Timeline: ___

Resources Needed: ___

Wish List (Nice to Have):

___

___

___

Section 15: Lessons learned and notes

15.1. What worked well?

___

___

___

15.2. What was challenging?

___

___

___

15.3. What to do differently next time?

___

___

___

15.4. Tips for others doing this

15.5. Additional notes

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APPENDIX: Useful resources

Integration Platform Resources:
- Zapier University: https://zapier.com/learn/
- Make Academy: https://www.make.com/en/academy
- Segment Documentation: https://segment.com/docs/

CRM Documentation:
- Salesforce API: https://developer.salesforce.com/
- HubSpot API: https://developers.hubspot.com/
- Pipedrive API: https://developers.pipedrive.com/

Analytics Resources:
- Google Analytics 4 Docs:
https://developers.google.com/analytics/devguides/collection/ga4
- GTM Setup Guide: https://tagmanager.google.com/

Community Support:
- Reddit r/MarTech: https://www.reddit.com/r/MarTech/
- Zapier Community: https://community.zapier.com/
- Stack Overflow: https://stackoverflow.com/

Template Version: 1.0
Created: February 2025

Last Updated: ______________________________

Tool Owner: ______________________________

Next Review: ______________________________

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Now go build your vibecoded marketing tool integrations!

In case you're still unsure what to do and need some help, no worries.

Just contact C-Mimmi-O!

- C-Mimmi-O website
- C-Mimmi-O YouTube
- C-Mimmi-O LinkedIn
- C-Mimmi-O Facebook
- C-Mimmi-O Instagram
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