

## **Bizible Installation Guide**

Within this guide we will be walking through how to install and setup Bizible. For implementation we will need admin level access to the following:

- Salesforce
- Integrated Ad Platforms - AdWords, Bing Ads, and Facebook
- Website

### **Salesforce:**

We will be installing 2 packages within your Salesforce environment and completing additional configuration for full visibility into Bizible.

1. [Bizible.com/sf](https://bizible.com/sf): This is our base package which includes our custom objects and fields. We recommend installing within Production for all users.
2. [Bizible.com/dashboard-mt](https://bizible.com/dashboard-mt): This is our Dashboard Extension Package, which contains 3 pre-built dashboards. We recommend installing within Production for all users.



## **Install Bizible Marketing Attribution & Analytics** By Bizible Marketing Analytics

Install for Admins Only

Install for All Users

Install for Specific Profiles...

### 3. Salesforce Configuration:

1. [Page Layouts](#): This is not necessary, but surfaces Bizible Touchpoints on an individual record.
2. [Bizible Permission Sets](#): These are assigned to the users of the Bizible product based on the level of accessibility you'd like the users to have.

3. [Sharing Reports and Dashboard Folders](#): Out of the box, the reports and dashboard folders we create are only visible to the install user. These will need to be shared with the additional Bizible users.
4. [Hide Report Types](#): Many of the Report Types we create within our product are not needed and to avoid confusion when learning to report on the product, we recommend hiding those that are not needed.
5. [Custom Amount Field Workflow \(if necessary\)](#): If you are using a custom amount field to record revenue in Salesforce, we will need a workflow created to map this field value to our Bizible Opportunity Amount field for revenue attribution reporting.

### **Bizible Account:**

After completion of the Salesforce package installs and configuration, we will then move forward with creating the Bizible Account at which point, we will connect Ad Platforms.

1. [Sf.bizible.com/signup](https://sf.bizible.com/signup) or [sf.bizible.com/salesforce/sandboxsignup](https://sf.bizible.com/salesforce/sandboxsignup) if installing in Sandbox.
  - a. You will begin adding in Account Details - Company Name, Phone Number, and Website. After the fields are populated, you will select to agree to the terms of service and save.

#### Account Configuration

Welcome to Bizible! Let's help you set up your new Bizible account. First start off by filling out the

COMPANY NAME

InstallTest

PHONE

4254254254

WEBSITE

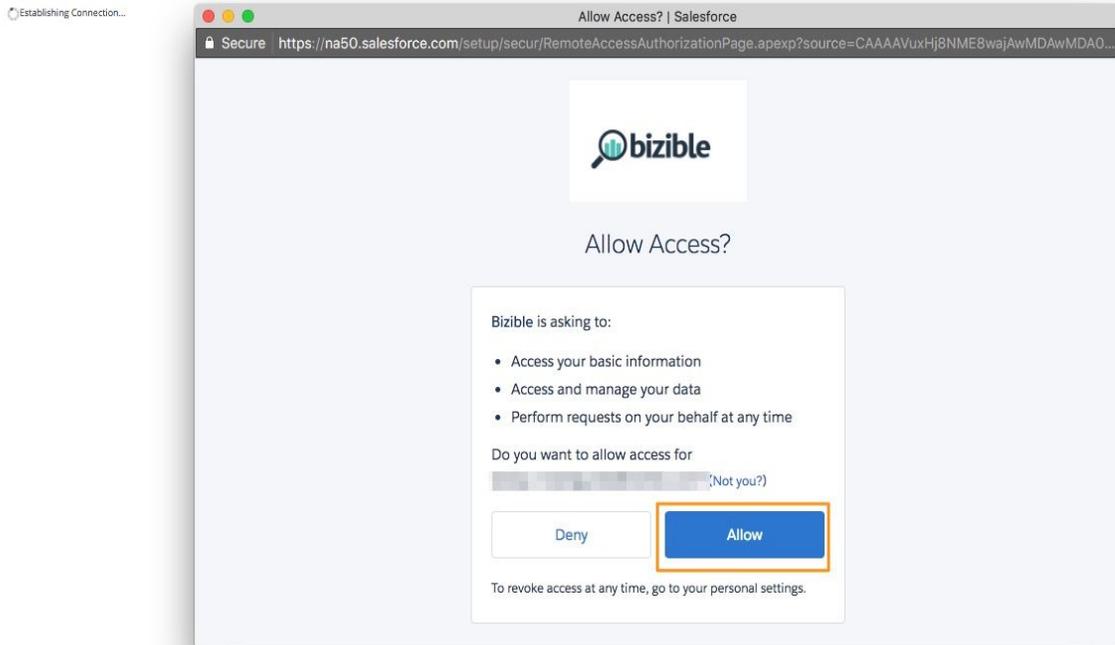
HTTP:// installtest.org

I agree to the Terms of Service

SAVE

This will generate a pop-up window for you to authenticate the connection to your Salesforce org at which point you will select "Allow".

Account Configuration  
Welcome to Bizible! Let's help you set up your new Bizible account. First start off by filling out the form below. Next we'll be able to detect if tracking is added to your site then allow you to connect to your ads connections. If you have any



- b. Once the connection is established, you will be brought to the next page which contains our JavaScript. The [JavaScript](#) needs to be placed across the entire site and landing pages. We recommend hardcoding within the head of your site, using one of our CMS plug-ins, or adding through [Google Tag Manager](#).

We did not detect Bizible Analytics installed on installtest.org

Place this script before the closing </head> tag on every page of your site.

```
<script type="text/javascript" src="//cdn.bizible.com/scripts/bizible.js" async=""></script>
```

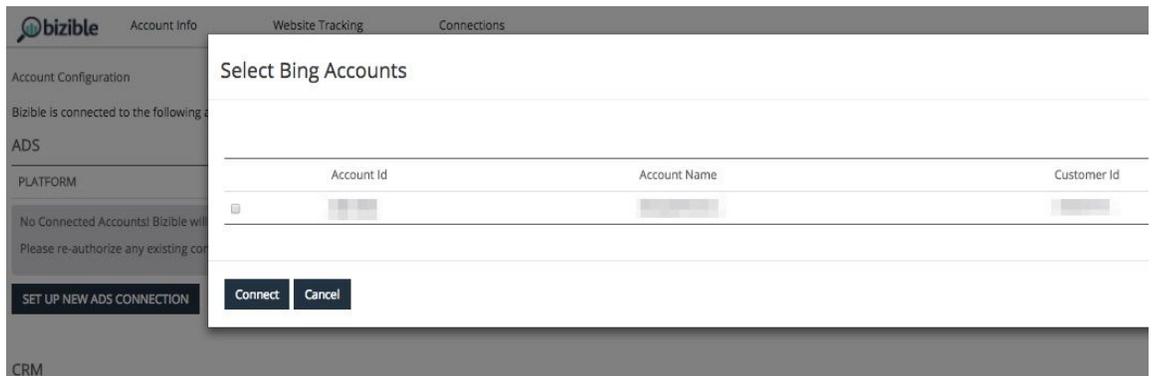
~ Need Help?

BACK

NEXT

- c. Within the next page, you will connect any of the API integrated Ads accounts - AdWords, Bing Ads, and Facebook.

- i. Select "Set Up New Ads Connection" and login with the credentials. A window will pop-up for you to select the account



you'd like to connect. After connecting all accounts, select finish.

Once you complete all of the above steps, you will be all set. If you run into any issues along the way, please don't hesitate to reach out to your Bizible representative or [support@bizible.com](mailto:support@bizible.com).