



Contentsquare's Ongoing Platform Maintenance Handbook

Our customers' guide to managing
ongoing changes to your
Contentsquare implementation

Document Overview

This document will suggest how to manage your Contentsquare deployment after the initial implementation is completed.

The following instructions will go through the essential steps you'll need to take in order to tailor the Contentsquare implementation around your needs and use cases. This document is relevant for business and technical stakeholders alike!

- 1 Adding an existing Contentsquare tracking tag to a new domain/sub-domain**
Allow data tracking for new domains
- 2 Blocking personal data from being collected using Contentsquare masking options (applies to existing and newly added pages) and enhancing the value of Session Replay module**
- 3 Tracking an addition page, or series of pages (any)**
Setting up tracking on new pages or flows
- 4 Tracking the Checkout flow**
Tracking the checkout flow on ecommerce sites
- 5 Track eCommerce transactions and associated metrics in Contentsquare**
Track ecommerce transactions on your site
- 6 3rd Party Integrations**
Connect Contentsquare to other technology partners, including analytics tools, A/B testing platforms, voice of customer platforms, and application performance monitoring tools
- 7 Tracking iFrames**
Ensure proper tracking is setup for iFrames
- 8 Reference your data layer to help build more granular mapping pages (Custom Variables - CVars)**
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Adding an existing Contentsquare tracking tag to a new domain / subdomain

WHY?

Each Contentsquare project's data is stored separately. Each project has its own TAG-ID and a list of domains to allow data collection.

HOW?

Steps to follow

1. Whitelisting the new domain/subdomain in the Contentsquare platform that is part of your contract - bring it to the attention of your Contentsquare Success Manager. Please share the domain/subdomain so it can get whitelisted on the Contentsquare side.
2. Is the Contentsquare Main Tag deployed on the new domain/subdomain? If yes - move to step #3. If not - deploy the Contentsquare main tag on the pages of the new domain/subdomain. Your Success Manager will provide you with the Tag ID, in case you don't have it already.

Instructions:

Contentsquare Main Tag - The Contentsquare Main tag is the 'code snippet' that needs to be implemented on the client pages in order to collect analytics data. It can be implemented through a TMS or on the site's template. Find step-by-step guides below:

- **Option 1:** using Contentsquare built-in templates: you can deploy the Contentsquare Main tag on the pages using the Contentsquare built-in templates in one of the following Tag Management Systems: [Google Tag Manager](#), [Adobe Launch](#) or [Tealium](#).
 - **Option 2:** using Custom HTML container in TMS: If you are using any other tag manager, you can add the Main Tag code into a [Custom HTML container](#).
 - **Option 3:** deploying directly on the pages: If you are deploying the Main Tag code directly on the page, here are the instructions: [Setting up the main tag directly on the pages](#).
3. Validate your tag Deployment - Use the [Contentsquare Tracking Setup Assistant Chrome Extension](#) to confirm the main Contentsquare tag is loaded and that a first pageview is sent. More info: [Checking The Loading Of The Main Tag](#).

2

Blocking personal data from being collected using Contentsquare masking options (applies to existing and newly added pages) and enhancing the value of Session Replay module

WHY?

Session replay is the foundation of qualitative analysis. It is the most tangible way to understand the what and why of a particular user's experience, and is often the best representation of a larger pattern of behavior.

If Session Replay is turned on and the user is being recorded, the HTML content of the page is sent to Contentsquare after every pageview (both natural and artificial) and every DOM change (only the updated elements are sent).

In order to have Session Replay feature enabled, some additional masking tasks will have to be carried out depending on the Personal Data method that you choose. More details below.

Note that Contentsquare never collects the actual text typed into any `<input>` or `<textarea>` field. The concern is other text elements that might contains Personal Data, e.g. `<p>`, `<button>`, `<h1/2/3..>`, `<div>`

HOW?

1. Decide which personal data masking option you are going to apply

You can find the explanation of the details of the different options on the next page.

- **Option 1:** Clear content with masked Personal Data at the element level (best option!)
- **Option 2:** Selectively Anonymized Pages by URL with AAA
- **Option 3:** Auto-Anonymized content with masking on all pages with AAA (please note, this reduces our ability to utilize session replay)

2. Proceed with your selected option

- **Option 1: Clear content with masked Personal Data**, you will need to decide whether you are going to use the **CSS Selectors Level** method or the **HTML Elements Level**. Both methods require you to add some code on your side or to utilize TMS templates in case you are using Google Tag Manager, Adobe Launch or Tealium.
- **Option 2: Selectively Anonymized Pages by URL with AAA**, you'd need to provide your Success Manager the list of URLs to be anonymized and Contentsquare will enable it for you.
- **Option 3: Auto-Anonymized content with masking on all pages with AAA**, just let your Success Manager know and Contentsquare will enable it for you.

Explanation of the different options

A. Clear content with masked Personal Data at the element level (preferable option)

There are two methods to remove content from the recorded HTML:

- **Using the Contentsquare Personal Data Selector:** Mask a list of selectors per page, using personal data selectors API. TMS can be utilized, developer resources can also set it up. Detailed instructions: [Personal Data Selector](#)
- **Tagging DOM Elements:** Add “data-cs-mask” attribute to all HTML elements that contain personal data. Instructions: [Tagging DOM Elements](#)

B. Selectively Anonymized Pages by URL

We offer the ability to fully anonymize all text elements for a specific URL before processing the data. All text on the page will show up as ‘AAAA’ on one of, or a group of pages, by defining the specific URLs to be included/excluded from being blocked.

It allows an initial set-up before blocking the individual elements and there is no development effort required but it significantly reduces the value of session replay and all non-restricted content is shown as AAAA. Therefore this is the less preferable option.

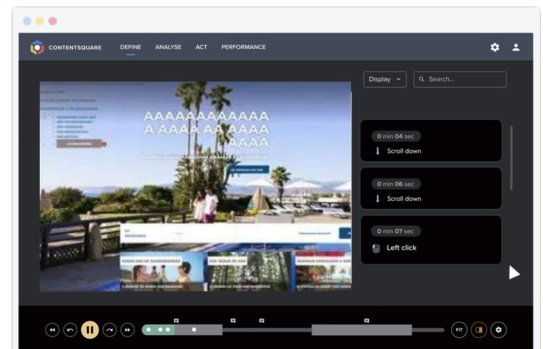
See screenshot below of a Session Replay using ‘AAAA’.

Instructions: [Here](#)

C. Auto-Anonymized content with AAA masking on all pages

We offer the ability to fully anonymize all text elements for a specific URL before processing the data. All text on **all pages** will show up as ‘AAAA’.

Instructions: [Here](#)

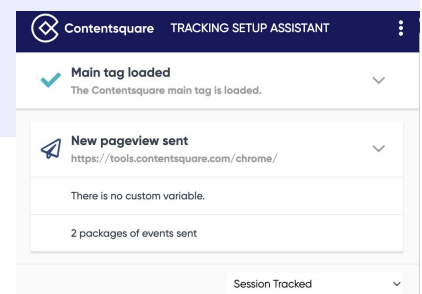


Validate your personal data masking

Install the ContentSquare Tracking Setup Assistant Chrome extension ([Installation](#)).

After you mask the Personal Data, you can test it by using the methodology of running a script locally in your browser to prevent 'AAA' masking from affecting your local session.

Documentation link: [Session Replay Testing](#)



3

Tracking an addition page, or series of pages

WHY?

Contentsquare allows you to tell a story with the data we collect. If your site is using Single Page Applications (such as ajax calls, react, angular) and the flow includes pages where the user traverses various steps in a journey without the page refreshing or it has dynamic elements (such as pop-ups or modals), it often requires to track them in Contentsquare as pageviews to unlock the most insight out of a user journey. We call these Artificial Pageviews (APV's). Not having artificial pageviews could make it challenging to capture the nuanced points of friction in a user's journey - ex. where the user is looping or is abandoning within a multi-step flow. This image below shows what a checkout flow could look like if it was built as an SPA and broken into individual steps. Obviously, some checkout flows are much longer than this.



HOW?

Steps to follow

1. **Confirm that there is no personal data on the pages**

before deploying the Contentsquare main tag on the new flow, please validate that there is no Personal Data in those pages. If there is personal data, you'd need to follow the steps to mask them. More details can be found in the previous use case covering personal data masking.

2. **Is the Contentsquare Main Tag deployed on the new flow?**

If yes - move to step #3.

If not - deploy the Contentsquare main tag on the pages on the new flow. Your Success Manager will provide you with the Tag ID, in case you don't have it already.

Instructions:

Contentsquare Main Tag

The Contentsquare Main tag is the 'code snippet' that needs to be implemented on the client pages in order to collect analytics data. It can be implemented through a TMS or on the site's template. Find step-by-step guides below:

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- **Option 2 - using Custom HTML container in TMS:** If you are using any other tag manager, you can add the Main Tag code into a [Custom HTML container](#).
- **Option 3 - deploying directly on the pages:** If you are deploying the Main Tag code directly on the page, here are the instructions: [Setting up the main tag directly on the pages](#)

HOW?

3. Is the new flow a Single Page application (SPA) or has any dynamic elements?

- **Tracking Single Page Application (SPA)**

The Contentsquare Tracking tag sends only one pageview per full reload. In a Single Page Application (SPA), that would be only once per session. To handle this, an [artificial pageview](#) on every page change is needed — the "History Change" event in most Tag Management Systems is perfect for this or you can fire a JavaScript on every page and on history change. It fires the main tag the first time and then sends an artificial pageview for each next call.

Instructions: [single page application tracking](#)

- **Tracking popup/modal windows**

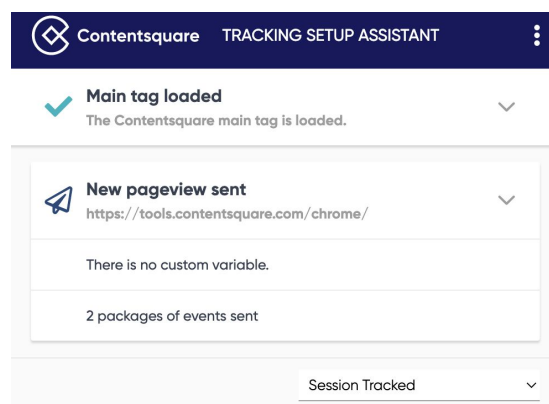
When the Contentsquare main tag is deployed on a page, a pageview is automatically sent when the main tag has loaded and a JavaScript instruction can be executed to send an artificial pageview via the *trackPageView* command. This command is useful when the page changes without provoking a full reload, meaning a new loading of the main tag: AJAX loading, Pop up opening, Tabs changing, etc.

To track a pop up opening/closure during the user's navigation, use artificial pageviews.

Instructions: [tracking a pop up opening/closing artificial pageview](#)

4. Validate your tag Deployment

install the [Contentsquare Tracking Setup Assistant Chrome Extension](#) Using this tool will allow you to check the configuration of the main tag, monitor all the pageviews, transactions and custom variables sent to our servers. More info: [Checking The Loading Of The Main Tag](#).

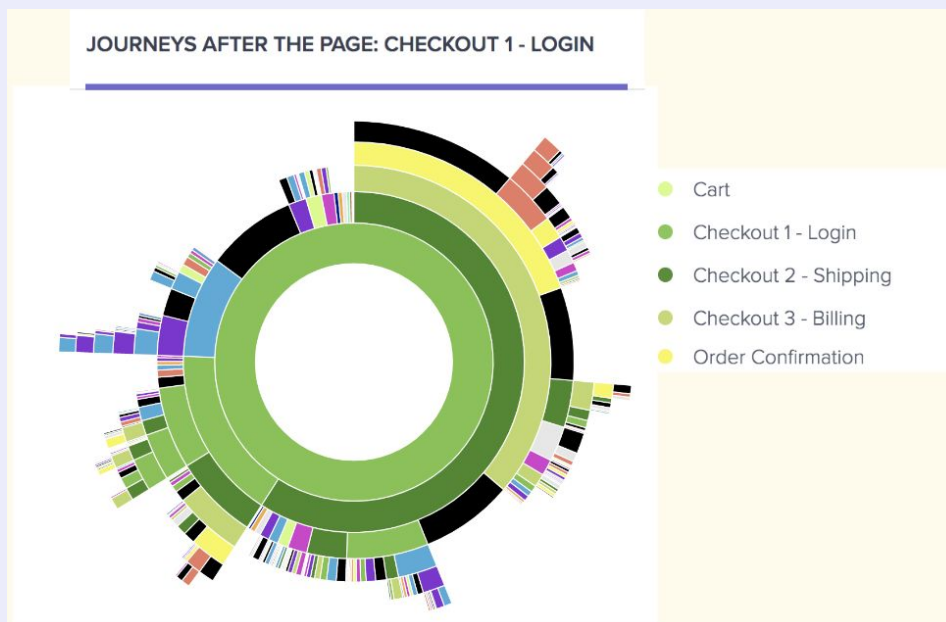


WHY?

The Checkout funnel is a key interface for Ecommerce websites. A common Contentsquare use case is optimizing the checkout funnel, which can have a major impact on conversion rate and can simplify your customers' journey.

Use Mapping to check if your Checkout pages are configured correctly by creating a mapping where all the checkout steps are separated and where the shopping cart and confirmation page are also mapped.

You can use the Journey Analysis module to visualize the Checkout Funnel to identify issues in the user journey.



HOW?

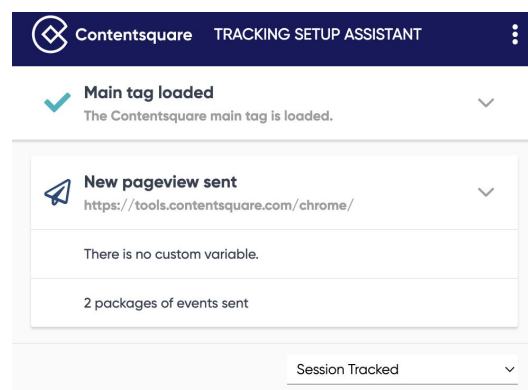
Steps to follow

1. **Confirm that there is no personal data on the pages** – before deploying the Contentsquare main tag on the new flow, please validate that there is no Personal Data in those pages. If there is personal data, you'd need to follow the steps to mask them. More details can be found in the previous use case covering personal data masking.
2. **Is the Contentsquare Main Tag deployed on the new flow?**
If yes – move to step #3.
If not – deploy the Contentsquare main tag on the pages on the new flow. Your Success Manager will provide you with the Tag ID, in case you don't have it already.

Instructions

Contentsquare Main Tag – The Contentsquare Main tag is the 'code snippet' that needs to be implemented on the client pages in order to collect analytics data. It can be implemented through a TMS or on the site's template. Find step-by-step guides below:

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HOW?

3. **Is the new flow a Single Page Application (SPA) or does it have any dynamic elements?**

If yes - you should create Artificial Pageviews in order to track the different steps of the flow. Instructions: [Sending artificial pageviews](#)

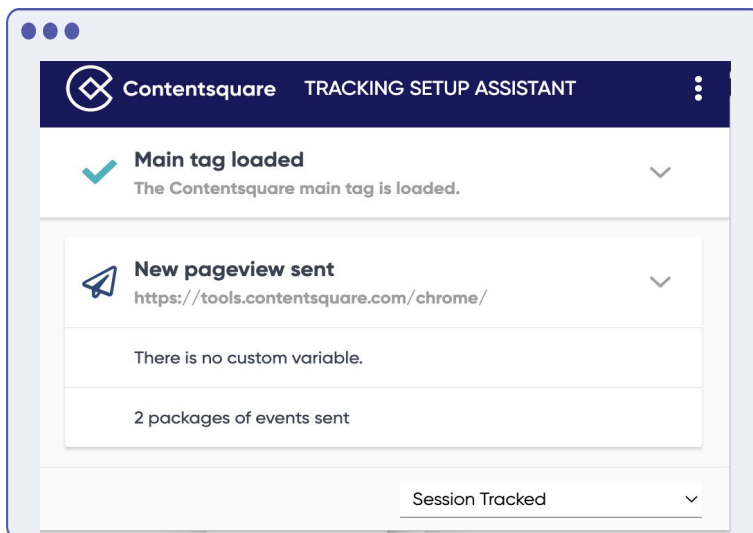
4. **Is the E-Comm Tag deployed?**

The eCommerce tag is used to keep track of the transactions happening on your site and unlocks a number of powerful analysis paths using Contentsquare's revenue-related metrics.

If yes - you can skip to step #5.

If not - follow these instructions: [E-Comm Tracking](#)

5. **Validate your tag deployment** - install the [Contentsquare Tracking Setup Assistant Chrome Extension](#) Using this tool will allow you to check the configuration of the main tag, monitor all the pageviews, transactions and custom variables sent to our servers. More info: [Checking The Loading Of The Main Tag](#).



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Track eCommerce transactions and associated metrics in Contentsquare

WHY?

The eCommerce tag is used to keep track of the transactions happening on your site and unlocks a number of powerful analysis paths using Contentsquare's revenue-related metrics.

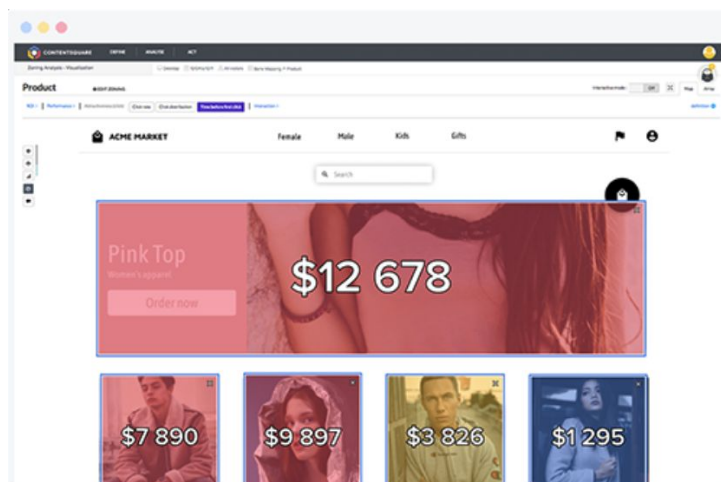
HOW?

Steps to follow

1. **The eCom tag needs to fire once on the confirmation page** (after the transaction has been finalized), and requires these parameters in order to function:
 - **Transaction ID**, which is the unique identifier for that transaction
 - **Revenue**, which is the total amount of the purchase

You can utilize the Contentsquare template for the E-Comm tag in your Tag Management System if you are using [Google Tag Manager](#), [Adobe Launch](#) or [Tealium](#). Alternatively a developer can also set it up using these [Instructions](#).

2. **Validate your tag Deployment** – install the [Contentsquare Tracking Setup Assistant Chrome Extension](#) using this tool will allow you to check the configuration of the main tag, monitor all the pageviews, transactions and custom variables sent to our servers. More info: [Checking The Loading Of The Main Tag](#).



WHY?

Technology partners integrate with ContentSquare, helping you manage your existing technology stack seamlessly. Whether that be analytics, A/B testing, or voice of the customer tools, Contentsquare adds an additional layer of behavioral insight to customer analysis.

HOW?

Steps to follow for any 3rd party integration:

1. Here is the catalog of the Integrations: [3rd Party Integrations](#). Check if your desired integration is listed.
2. **How to request an Integration?** Please go to the section [How to request an integration](#) to see the instructions to enable this integration. You can then return here once completed.



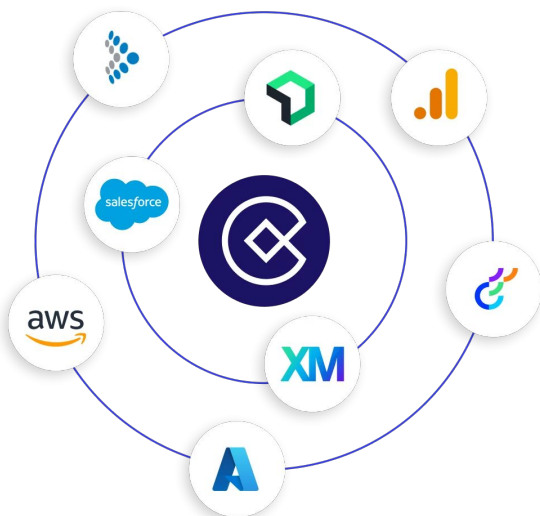
Web Analytics Platforms

Web Analytics platforms are typically part of regular reporting across an organization and deeply embedded in an organization. Web Analytics platforms help you understand what your users are doing, what sources of traffic they're coming from, and which campaigns are performing well. With traditional Web Analytics, you know the **WHAT** but you don't always know the **WHY**. Contentsquare fills the experience gap, showing you why users are behaving the way that they do, providing insight into their struggles and how much it's costing the business.

Contentsquare integrates with most of the web analytic platforms that are available in the market.

When Contentsquare is used together with Web Analytics tools, you can:

- A segment represents a group of sessions having one or more characteristics in common (which we call conditions), and/or who achieved the same goal(s). Import your Adobe and Google Analytics segments into ContentSquare to visualize customer behaviors, giving you the full context needed to empathize with your visitors and improve their experience with the right treatments/solutions.
- Access session replays links directly from within Adobe and Google Analytics so you can easily drill down and understand the why behind your Analytics data.
- Use Contentsquare insights to fine-tune segments over time, focus testing, and develop superior digital journeys.



A/B Testing

Let's imagine you have a hypothesis that adding a promotional banner to the top of your homepage will increase conversion... What do you do?

You don't always want to put it live to 100% of your traffic immediately in case it negatively impacts conversion. If you did put it live to 100% of your customers, how do you know that any change in conversion was due to the change and not other factors? This is where testing comes into play!

- Test a hypothesis on a smaller sample of your customers to confirm that it will improve your KPI before exposing it to everyone.
- Measure the performance of a hypothesis statistically, removing external factors from the equation.



Voice of Customer (VOC)

Voice of the Customer (VOC), also known as “Experience Management Software”, platforms consolidate feedback from a specific target audience and deliver actionable insights and follow-up steps to close the loop. Experience management solutions build on the features provided by **survey software** and **enterprise feedback management software** by adding functionality that enables businesses to plan and take informed actions based on received feedback.

In order to drive growth, marketing and customer experience teams need to work together to understand the impact that poor digital experiences and low feedback scores are having on their business. They need to identify potential problems, measure their impact, and empathize with their customers to quickly provide the right solutions before it's too late.



Application Performance Monitoring (APM)

Application performance monitoring (APM) tools allow users to monitor and track the performance of particular software or web applications to identify and solve any performance issues that may arise. With the ability to identify and fix any performance issues, businesses can provide an optimal user experience.

Trace data can point to things that might be going wrong with your users' digital experience; however, it's impossible to really gauge the severity of user impact by looking at trace data alone.

Get more value from your Application Performance Monitoring solution by seeing how performance truly affects your customers' experience. What do slow load times mean for your customer? What is the root error causing your customers to behave the way they do? And how do you prioritize what to fix based on impact on the business?

APMs alert you when your users may be feeling pain. Through our integration with APM platforms, Contentsquare shows you exactly what a user was doing before and during an error occurrence so that you can remediate issues quickly and with the complete picture, dramatically reducing the time-to-repair of system errors by linking to your impacted users' exact session.

With a Contentsquare and APM integration, you can:

- Prioritize the issues that matter most - combine the technical data from your APM with the behavioral data surfaced from Contentsquare to uncover and prioritize the issues that have the greatest impact on your customer experience and revenue.
- Reduce time-to-fix / speed up time-to-resolution (identify the root cause of customer issues)- by integrating Contentsquare with your APM, you can provide your engineering team with all of the necessary technical and behavioral data needed to prioritize a fix, without having to spend cycles trying to recreate the issue.



WHY?

An `<iframe>` element (short for inline frame), is an HTML element that allows an external webpage to be embedded in an HTML document.

iFrames are used to insert **a piece of content from another source** into a web page – it's like an extra window on a page, showing external sources within it. The content of the embedded source appears as if it is part of the main website layout, except it is not.

iFrames are commonly used to embed specific content like external ads, videos, tags, or other interactive elements into the page. In some cases, in the banking industry or e-shops for example, iFrames are often used to embed highly secured web pages for confidential information or checkout.

Note that even if content can be embedded in an iFrame, the Contentsquare Tag is not able to track all content: for iFrames to be supported in our solution, the source content should be accessible publicly, and you must be able to edit the HTML in order to implement the Tracking Tag.

If you would like to track the user behavior on iframes, please follow the steps listed below.

HOW?

Steps to follow:

Make sure the tracking tag is present in both the top window and the iFrame.

Please note that this step may be more difficult to achieve if you do not own the iFrame, as you must arrange with the iFrame provider (i.e., the iFrame owner) to load the Contentsquare Tracking Tag inside the iFrame. If you do, the iFrame will be tracked.

Your Success Manager will provide you with the Tag ID, in case you don't have it already.

1. Make sure the tracking tag is present in both the top window and the iFrame. Please note that This step may be more difficult to achieve if you do not own the iFrame, as you must arrange with the iFrame provider (i.e., the iFrame owner) to load the Contentsquare Tracking Tag inside the iFrame. If you do, the iFrame will be tracked. Your Success Manager will provide you with the Tag ID, in case you don't have it already.
2. Enable iframes support on the Contentsquare side - bring it to the attention of your Contentsquare Success Manager. Your Success Manager will make sure that the domain of the iframe is whitelisted in the Contentsquare platform (in case it is different from your tracked domain) and the Success Manager will request to enable it for you on the Contentsquare side.
3. Once #1 and #2 are completed then your iframe will be tracked by the Contentsquare Tag and you will be able to see the content of the iframe both in Zoning and in Session Replay.

More information about tracking iFrames can be found [here](#).

8

Reference your data layer to help build more granular mapping pages

WHY?

We use Custom variables (cVars) in order to give additional information about the page the end-user is visiting. Custom variables are sent within the pageview request. This means they can be sent once per page and at page load.

As the Pageview is sent just after the Tag was executed, Custom variables have to be set before the Tag is executed too.

CVars can be used directly for mapping and segments - Custom variables are composed of a key/value pair and are used to define a page group in mappings or to select a specific population in segments.

This is essential for data aggregation and Journey Analysis.

HOW?

The information needed to populate the Custom variable is somewhere on the page. Once the data is identified, a simple javascript function will retrieve the info and populate the cVars with it. In many cases, the information is retrieved from **the data layer**.

Ex. 'Page Name', 'Page Type' - PDP

Instructions: [Sending Custom Variables](#)

The screenshot shows the Contentsquare 'Reference mapping' interface. At the top, there's a navigation bar with 'ContentSquare', 'DEFINE', 'ANALYZE', 'PERFORMANCE', and 'Benchmark Beta'. Below that, a 'Back to mapping list' link and a 'Glossary' link are visible. A progress bar shows '99.0 % Exhaustivity' and '0.97 % Undefined'. A search bar for 'Search page groups' is present, along with a '49 / 200 page groups' indicator and a 'New page group' button. The main table lists page groups with columns for 'Page group name', 'Page views', and 'Number of pages'. The 'HOME' section includes 'Site Overview' (28,473 views, 3,875 pages). The 'CATEGORY' section includes 'Analyse Zoning' (14,699 views, 9,240 pages), 'Analyse Session Replay' (12,375 views, 2,882 pages), 'Define Mapping' (5,152 views, 1,617 pages), 'Analyse Journey Analysis' (3,715 views, 1,285 pages), 'Analyse Page Comparator' (3,535 views, 1,260 pages), and 'Performance Dashboard' (1,780 views, 906 pages). A 'HELP' button is at the bottom right.

	Page group name	Page views	Number of pages	Actions
HOME	Site Overview	28,473 (37.0%)	3,875	...
CATEGORY	Analyse Zoning	14,699 (19.1%)	9,240	...
	Analyse Session Replay	12,375 (16.1%)	2,882	...
	Define Mapping	5,152 (6.69%)	1,617	...
	Analyse Journey Analysis	3,715 (4.83%)	1,285	...
	Analyse Page Comparator	3,535 (4.59%)	1,260	...
	Performance Dashboard	1,780 (2.31%)	906	...

9

Dynamic Variables (dVars) for Segmentation and for integrations with other 3rd party tools

WHY?

Dynamic variables (dVars) are additional information on the session. They are used for segmentation purposes and are often used to segment audiences.

Dynamic variables are also used a lot for integrations with other parties.

Dynamic variables generally have a key and value pair (can have many dynamic values). Dynamic variables can be sent at any time during a session as they don't require sending a pageview.

HOW?

The information needed to populate the **Dynamic variables** live on the page. Once the data is identified, a simple javascript function will retrieve the info and populate the Dynamic Variable (Dvar) with it.

Key = Home Page Banner Test

Value = version A / Version B (etc.)

Instructions: [Sending Dynamic Variables](#)

Create a new Segment

Customvar based Segment × ★							
ALL VISITS	3.67%	DESKTOP	81.8%	MOBILE	10.5%	TABLET	0.96%
	731		598		77.0		7.00

Includes all visits matching the following conditions:

Custom variable ▼ The custom variable ▼ defined on ▼ 🗑️

has a ▼ which is set to any value ✓

[+ Add condition](#)

[+ Add a group of conditions](#)

WHY?

A flexible type of event which can be used to define any kind of interactions, behaviors, or user states. This is sent as a string.

Custom page events are **additional information on the session** therefore they are very useful for **segmenting sessions in a very flexible way**. Custom page events are used when we want to **segment based on (a) specific visitor action(s)**.

HOW?

Custom page events are as flexible as anything you can do with JavaScript on a web page. Each page event is **unique and possibilities are infinite!**

“PageShowedSearchResults”.

This event would show you a segment of all visitors who saw search results on a page.

Instructions: [Sending Page Events](#)

WHY?

In today's fast-paced digital landscape, it's essential for e-commerce businesses to stay up-to-date with the latest technologies and trends to remain competitive. Replatforming your website can provide many benefits, such as improved site speed and functionality, increased customer satisfaction, and cost savings. However, the replatforming process can be complex and challenging, requiring careful planning and execution to ensure a successful outcome. This guide provides a step-by-step approach to replatforming your website, from planning and preparation to implementation and post-launch support.

HOW?

When you replatform your website, you'll need to update your Contentsquare deployment. We have many guides to allow you to replatform autonomously. Alternatively we have a professional services offering to support you during this transition. Please discuss this offering with your Contentsquare Customer Success or Account Manager.

- Here are some best practices for a seamless transition: [Download Guide](#)
- To help you **navigate replatforming complexities**, here's a [webinar recording](#) with a Contentsquare expert sharing insights, tips, and best practices for success.
- More info: [Introduction to Replatforming](#)