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Leading customer tracking through smart short links in Salesforce

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User Guide v1.4.x

https://shortify.ing

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Home Page

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Dashboard

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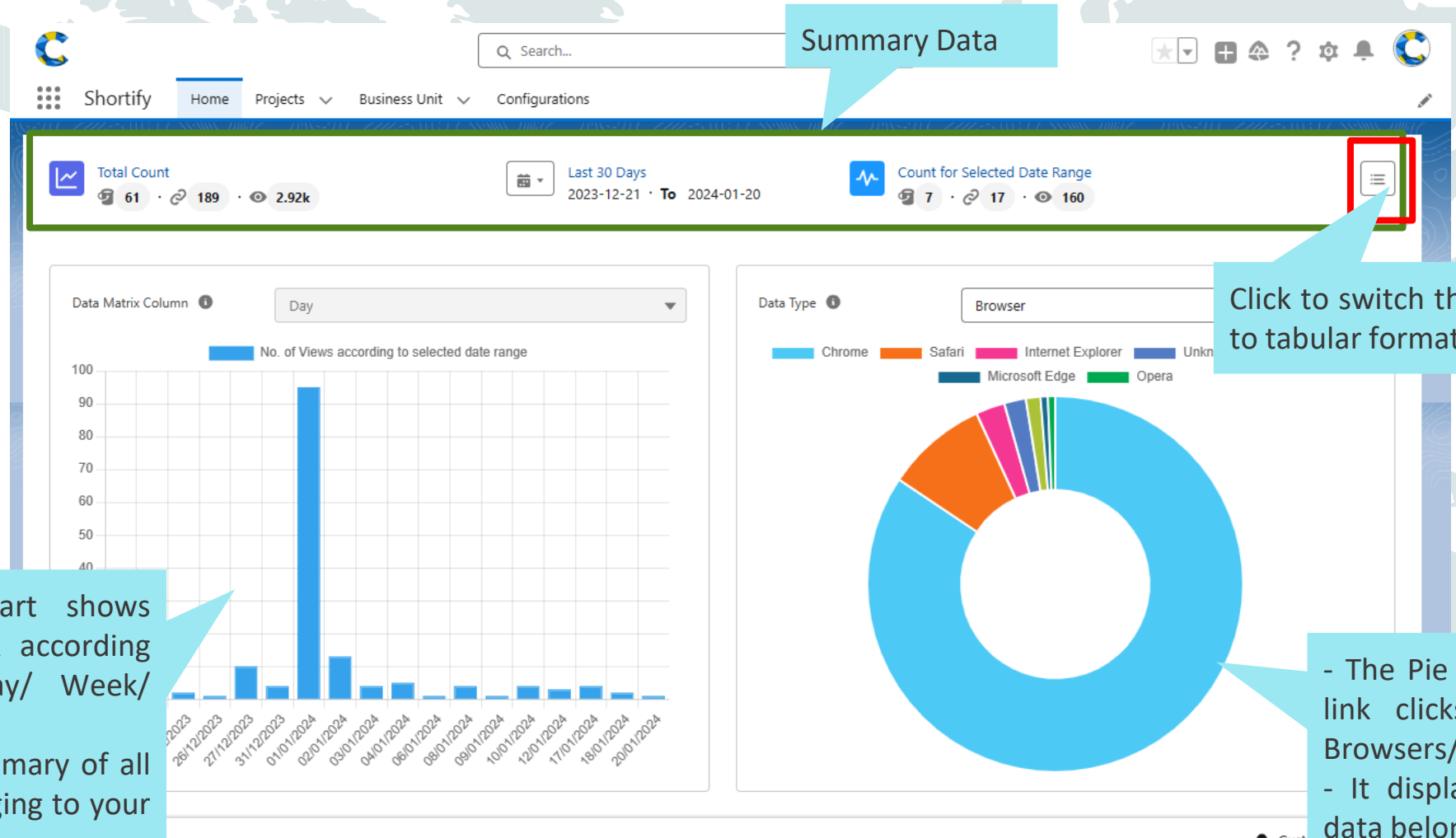
Landing Home Page: Show Analytics data in Chart format



- The Bar chart shows whole link click according to selected day/ Week/ Month
- It displays summary of all user data belonging to your department

- The Pie chart shows summary of link clicks segregated based on Browsers/ Devices/ OS/ Referrals
- It displays summary of all user data belonging to your department

Support Page

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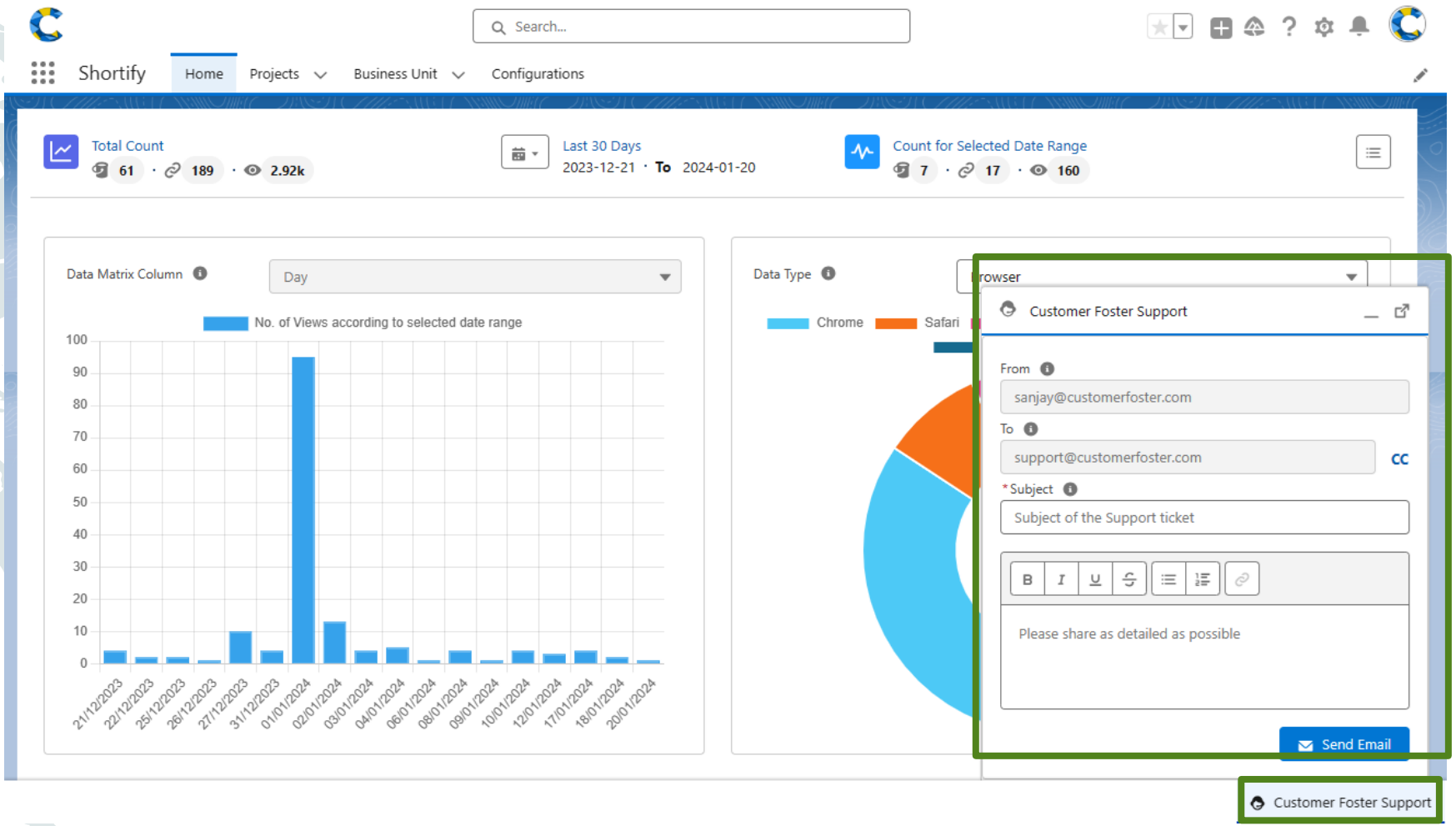
Use the “Customer Foster Support” link available in the bottom to contact with Customer Foster Support team with fastest possible manner.

Use support window to report a bug, request a new feature or ask for any type of help.



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URL Project Creation and Management

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URL Project

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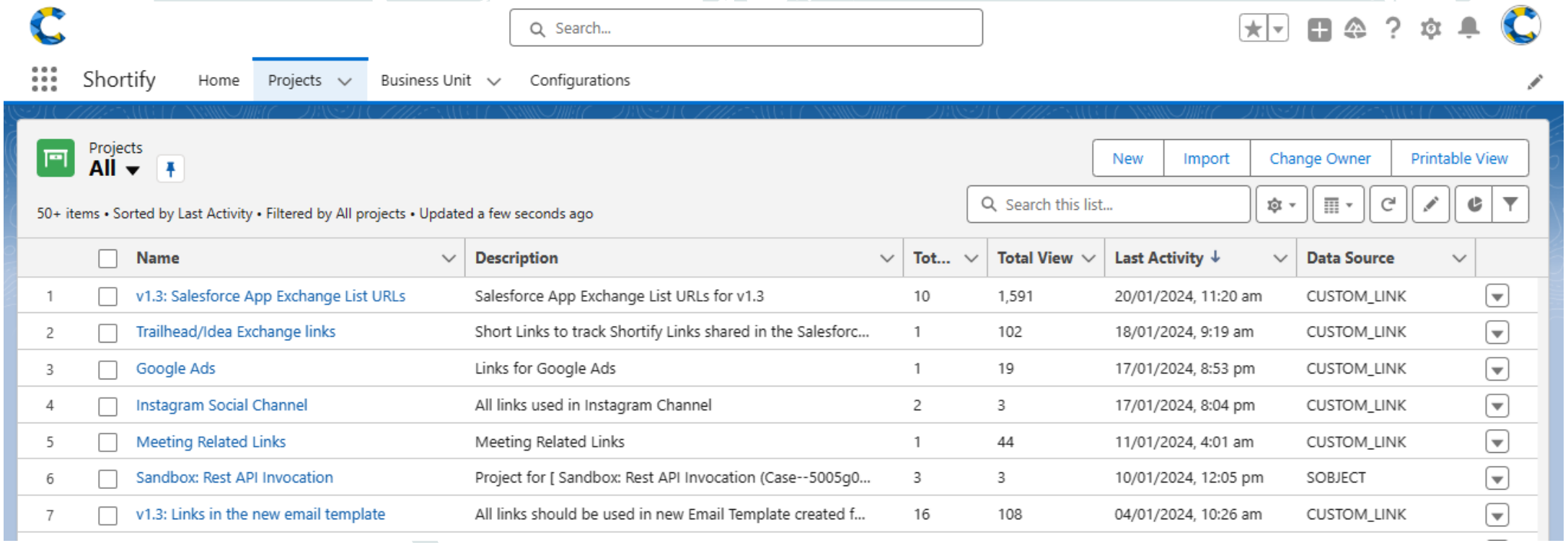
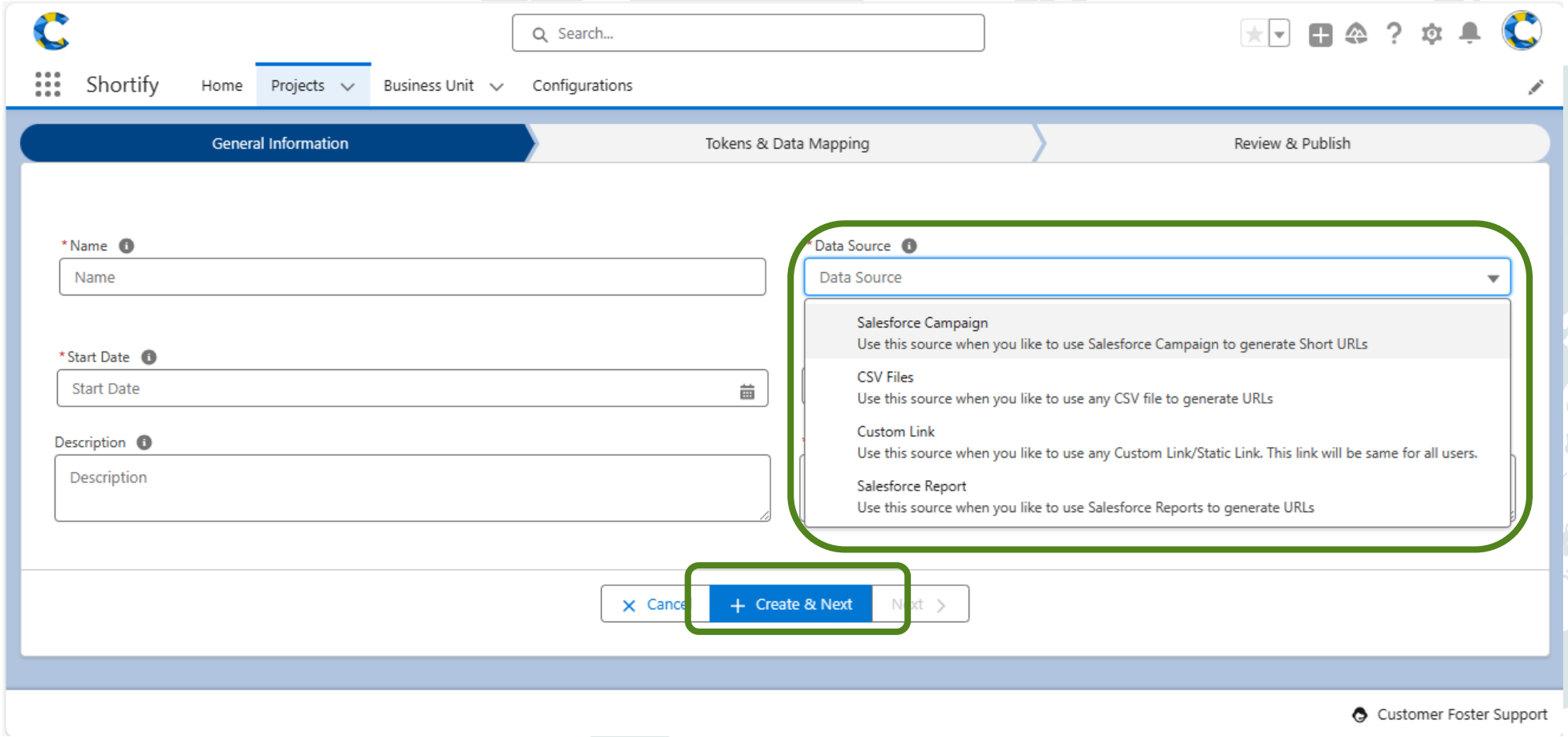
URL Project tab page, This list can Have Salesforce Campaign/ Report based, CSV upload and Custom Link type of URL Project.



	Name	Description	Tot...	Total View	Last Activity	Data Source
1	v1.3: Salesforce App Exchange List URLs	Salesforce App Exchange List URLs for v1.3	10	1,591	20/01/2024, 11:20 am	CUSTOM_LINK
2	Trailhead/Idea Exchange links	Short Links to track Shortify Links shared in the Salesforc...	1	102	18/01/2024, 9:19 am	CUSTOM_LINK
3	Google Ads	Links for Google Ads	1	19	17/01/2024, 8:53 pm	CUSTOM_LINK
4	Instagram Social Channel	All links used in Instagram Channel	2	3	17/01/2024, 8:04 pm	CUSTOM_LINK
5	Meeting Related Links	Meeting Related Links	1	44	11/01/2024, 4:01 am	CUSTOM_LINK
6	Sandbox: Rest API Invocation	Project for [Sandbox: Rest API Invocation (Case--5005g0...	3	3	10/01/2024, 12:05 pm	SOBJECT
7	v1.3: Links in the new email template	All links should be used in new Email Template created f...	16	108	04/01/2024, 10:26 am	CUSTOM_LINK

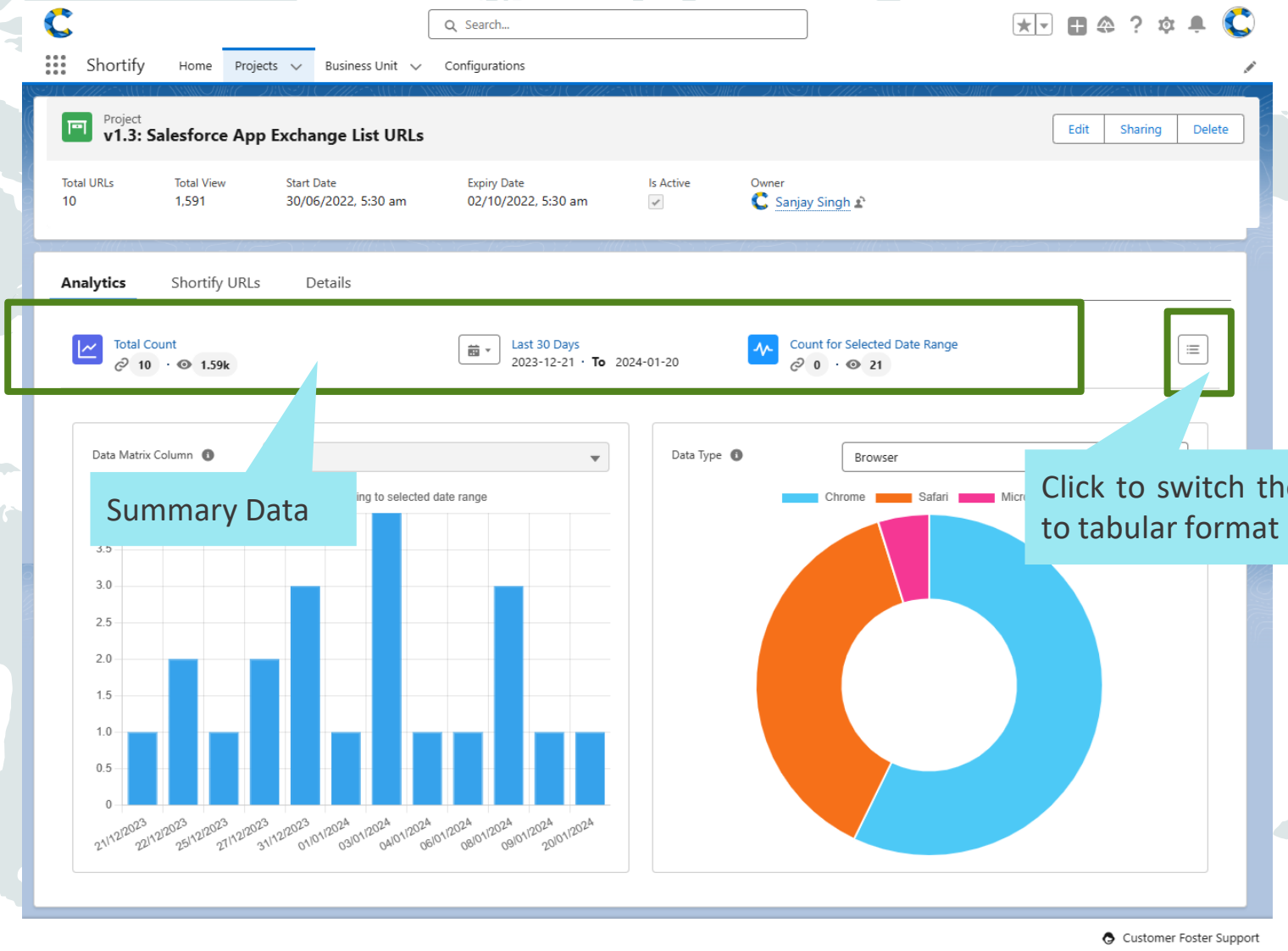
URL Shortening Options

You can create 4 types of Short URL Project according to selected data source. These are Salesforce Campaign based, Report based, CSV file upload and Create Custom Links.



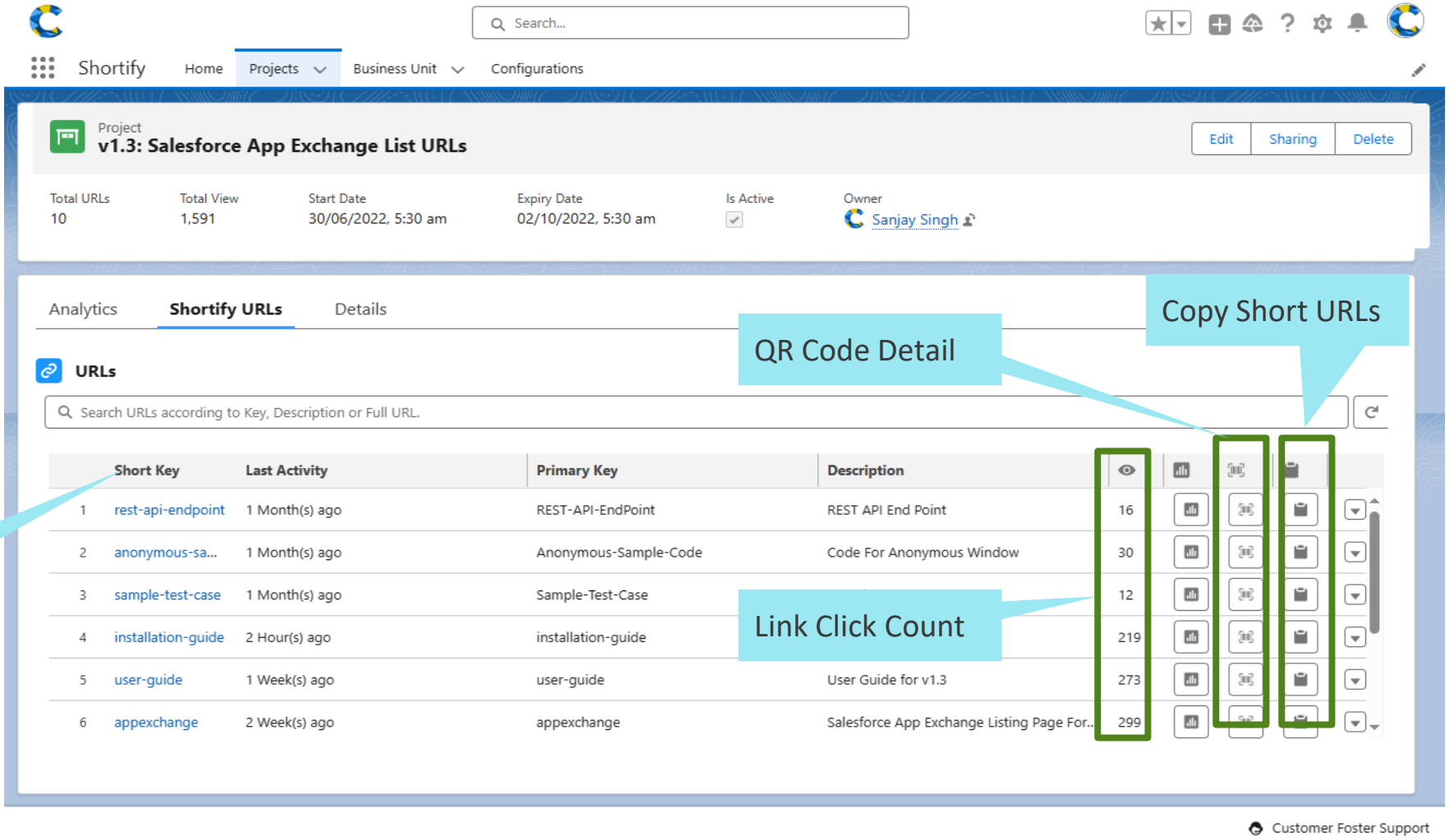
“Analytics” Details

It displays “Link click” analytics data in Bar Chart and Pie Chart for Short URLs.



List of “Shortify URLs” with Basic Details

It displays list of generated short URLs with the “full URLs” and “link click” counts.



Short Key

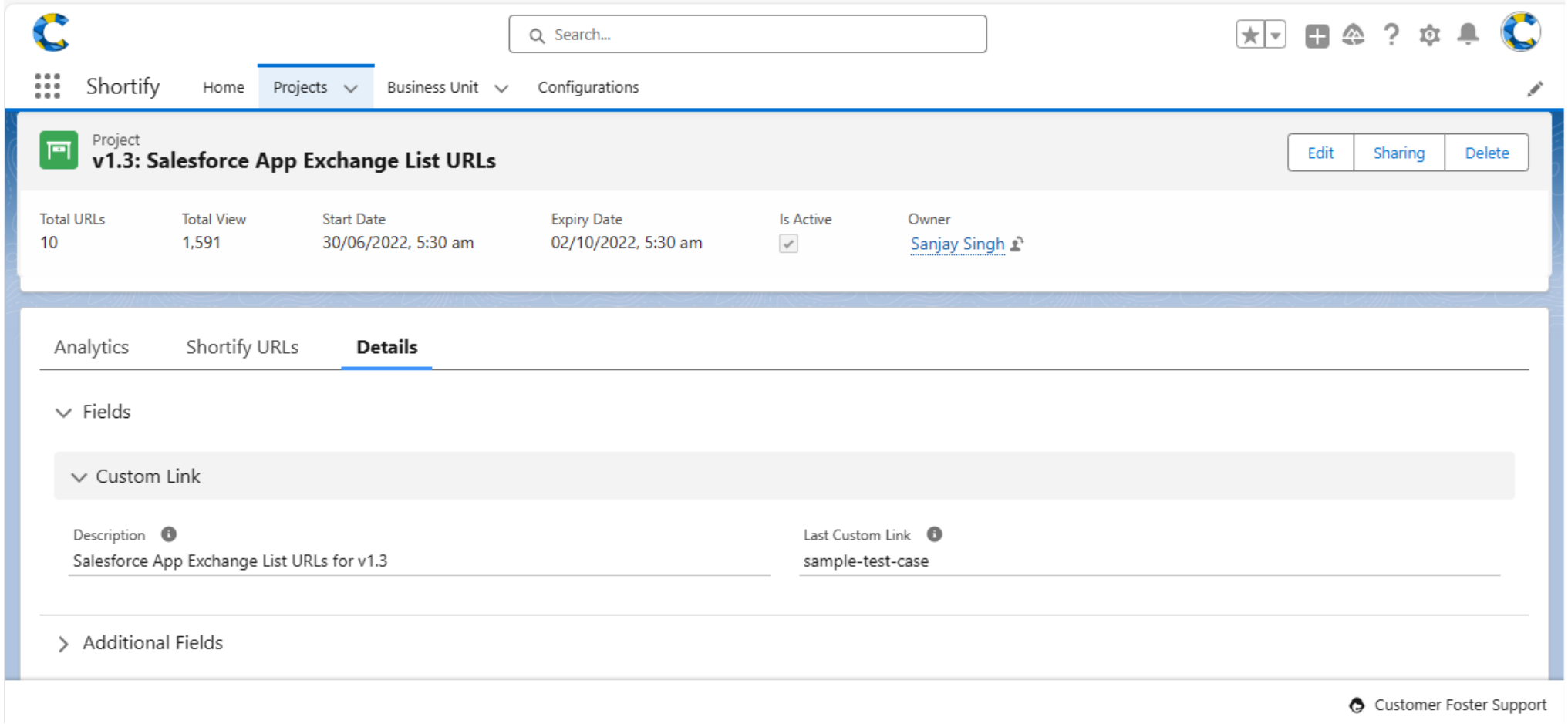
QR Code Detail

Copy Short URLs

Link Click Count

Short URL Key “Details”

It displays basic details of Short URLs like Data Attributes (fields), Data Source of the bucket etc.



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URL Project Creation with CSV File Option 1: Pre-formatted Data

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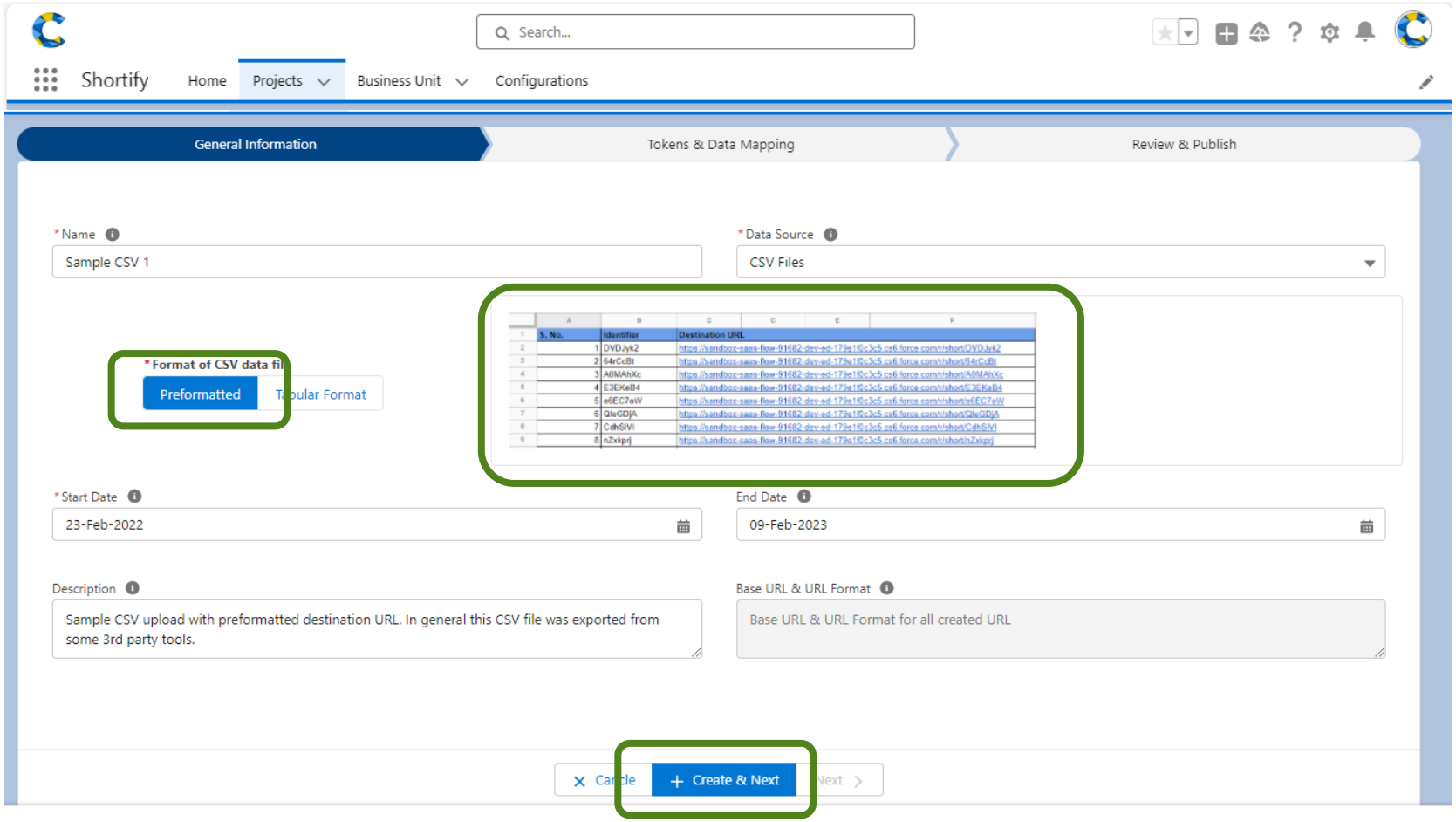
Pre-formatted CSV Upload - Step 1

If the destination URLs are already generated and you want only to short the URLS in bulk, use this option. Upload the CSV file with required fields (Primary Key and Full URL) and follow the steps to generate short URLs.



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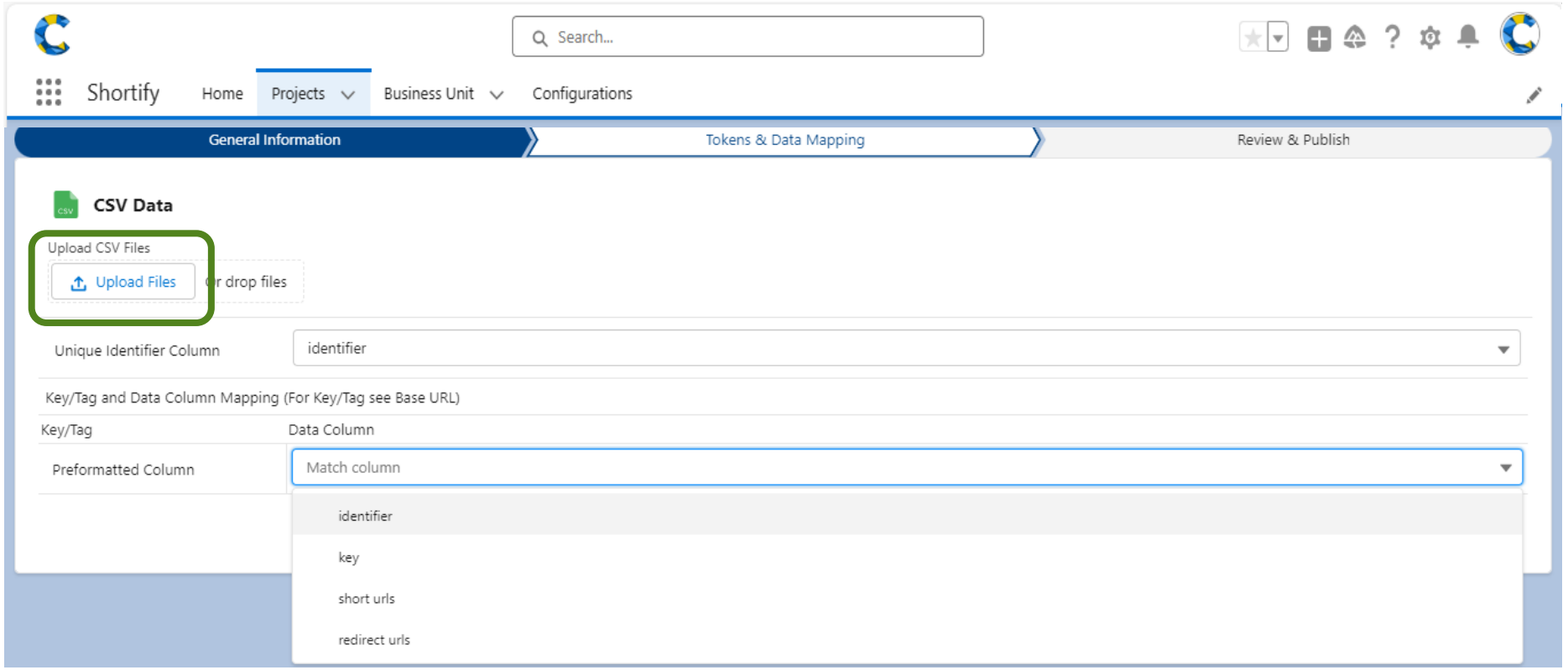
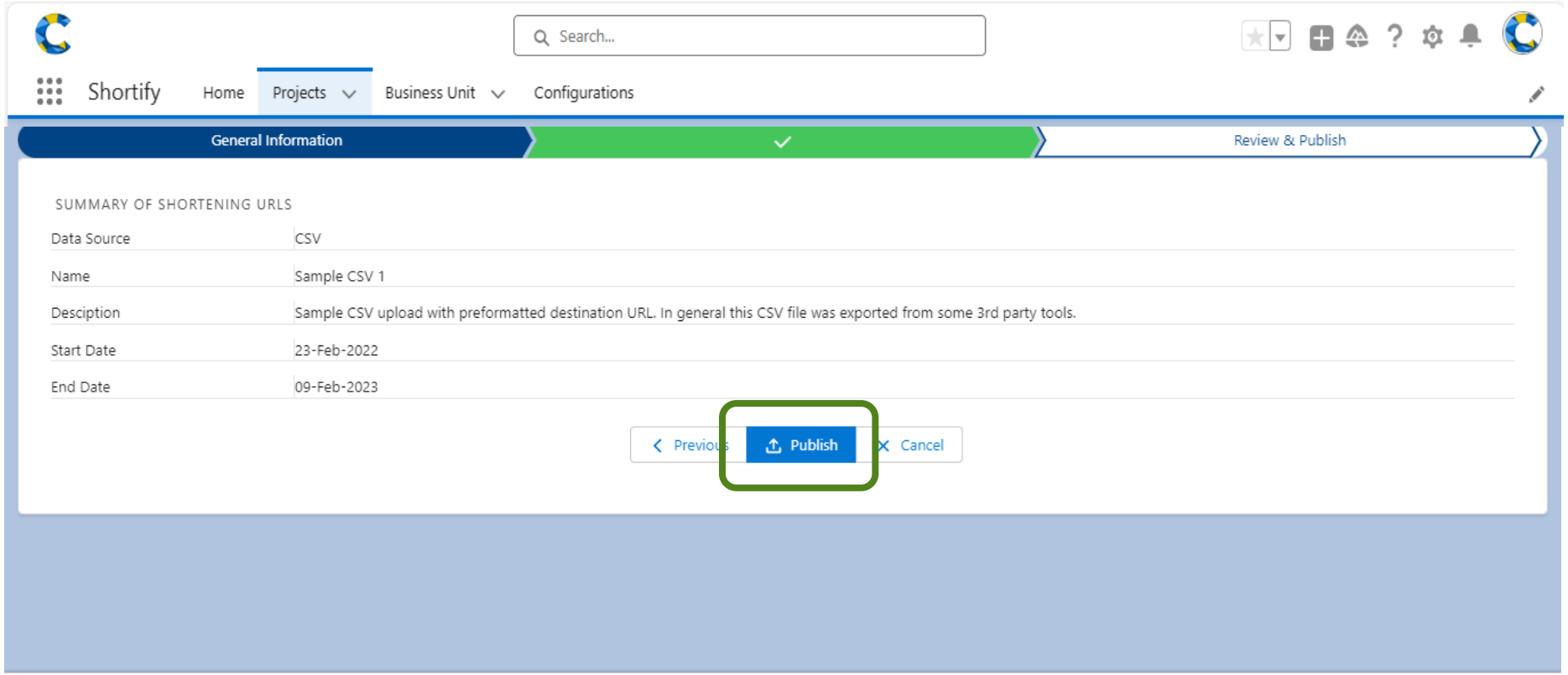
Pre-formatted CSV Upload – Step 2

- Upload CSV from local system
- Map columns according to the CSV file



Pre-formatted CSV Upload – Step 3

- Validate details and publish Short URL
- After completion of process, you will receive an email with the final short URLs as an attachment



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URL Project Creation with CSV File Option 2: Tabular Format

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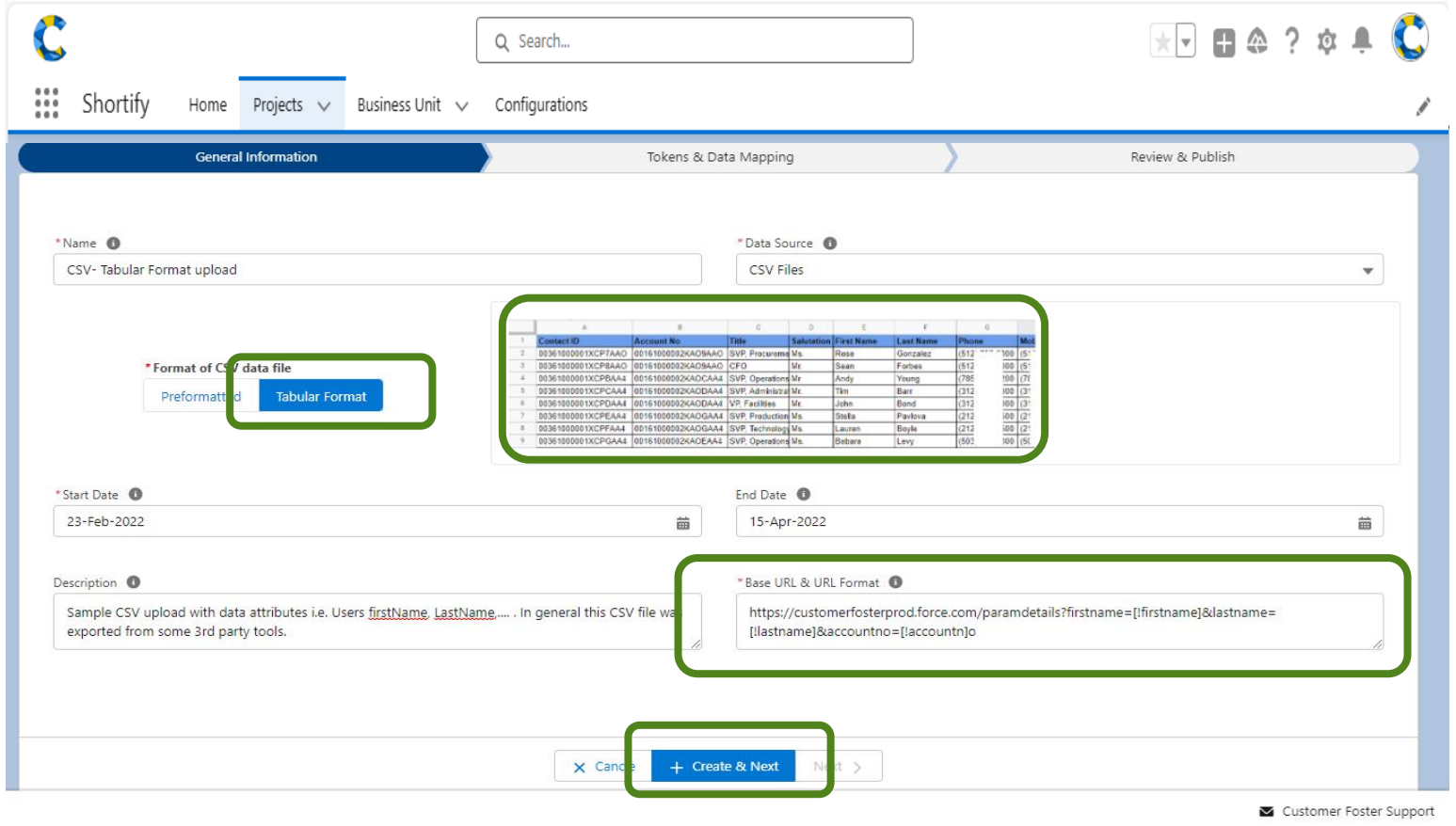
Tabular CSV Upload – Step 1

if you have a base URL along with other personalization attributes like first name, last name, email, customer ID, etc., and you want to create short links with personalization data as URL attributes, it requires to follow the tabular format for short URL generation.

- Provide basic details which are used to generated final URLs using this tabular data.
- Provide the Base URL in 'Base UL & URL Format' with all personalization attributes/ token following the format of ([!PERSONALIZATION_TOKEN]). Based on the PERSONALIZATION_TOKEN name, matching data will be populated from the data source for each of the customer record.



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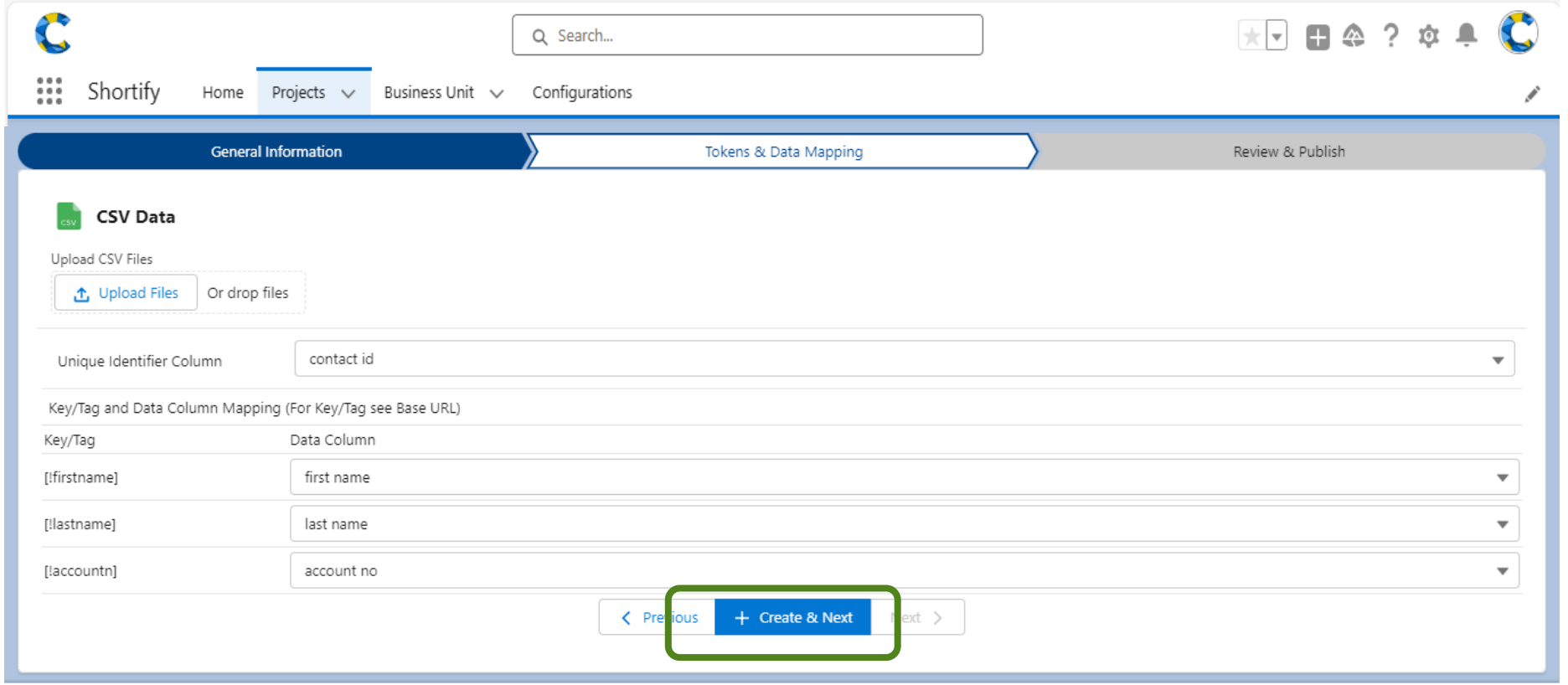
Tabular CSV Upload – Step 2

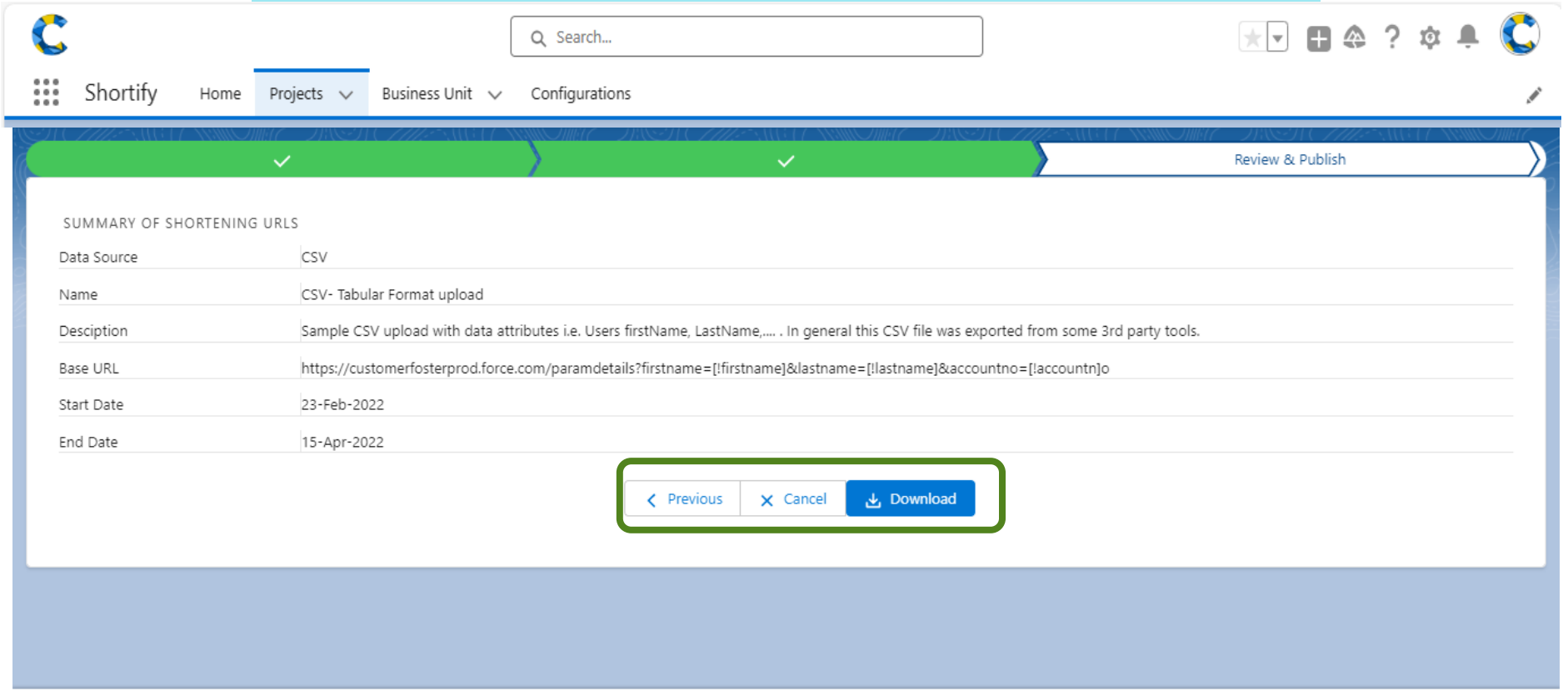
- Map CSV file columns according to base URL tokens.
- Number of rows depends on the token defined in the URL (1st screen)
- Every URL token needs one CSV data column mapping.



Customer Foster Support

Tabular CSV Upload – Step 3

- Validate details and publish Short URL
- After completion of process, You will get email with final short URLs as an attachment



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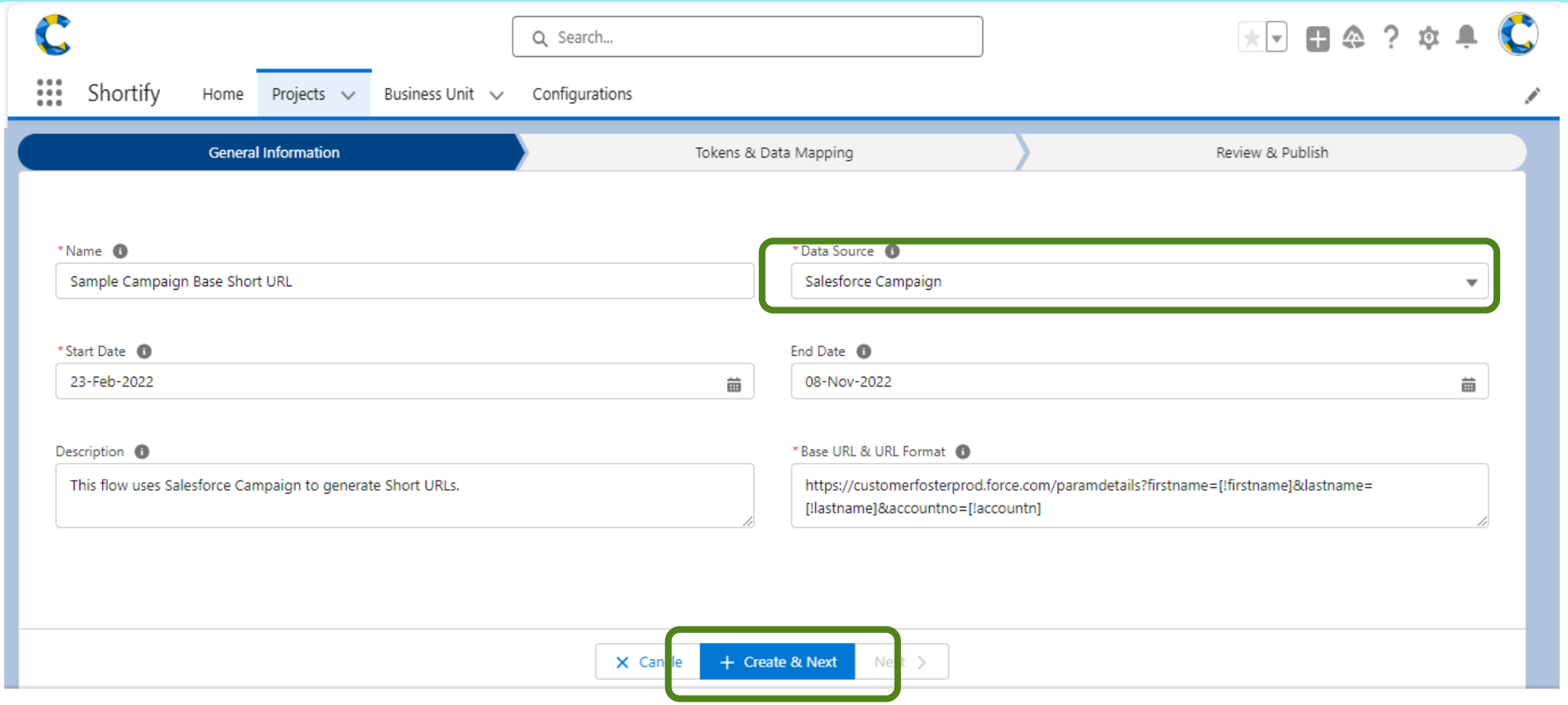
URL Project Creation Based on Campaign Data

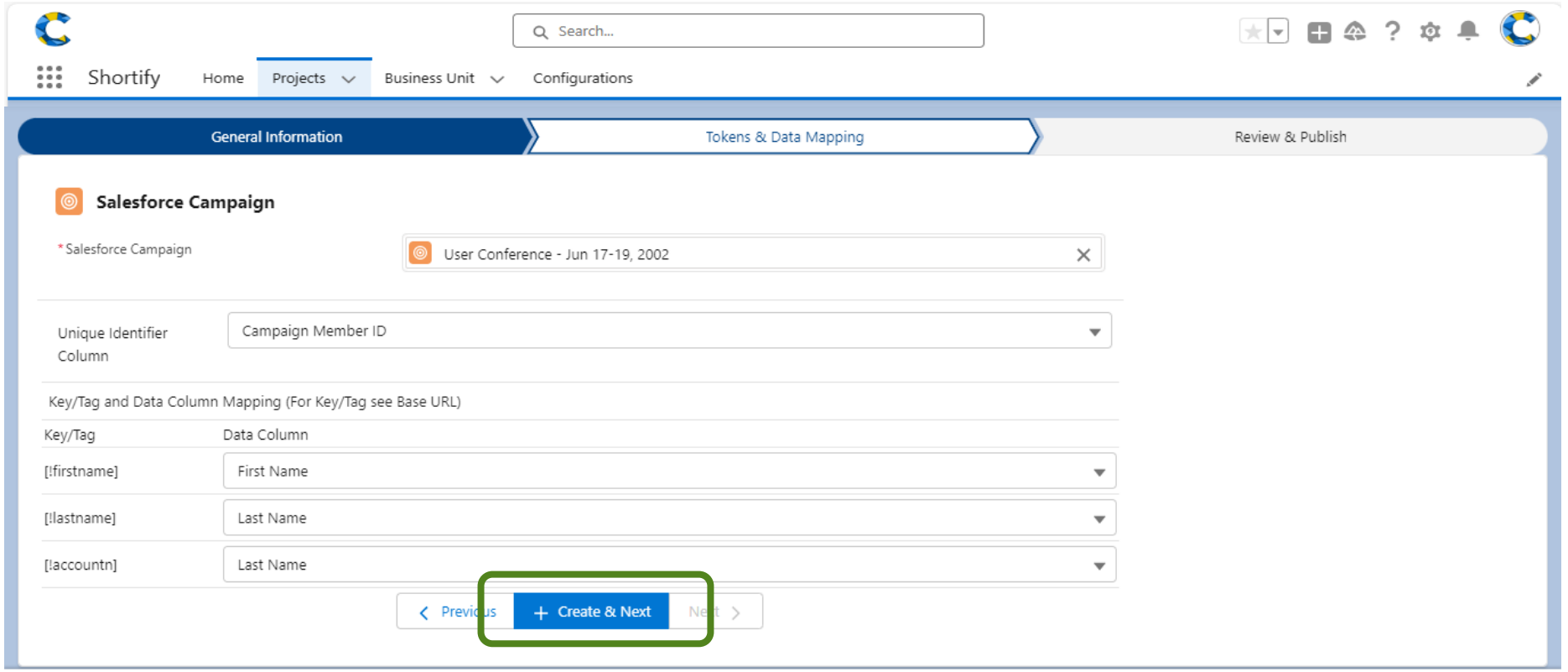
Based on Campaign Data - Step 1

- Select **Salesforce Campaign** as 'Data Source'.
- Fill up other basic details.
- Provide the Base URL in 'Base UL & URL Format' with all personalization attributes/ token following the format of ([!PERSONALIZATION_TOKEN]). Based on the PERSONALIZATION_TOKEN name, matching data will be populated from the data source for each of the customer record.



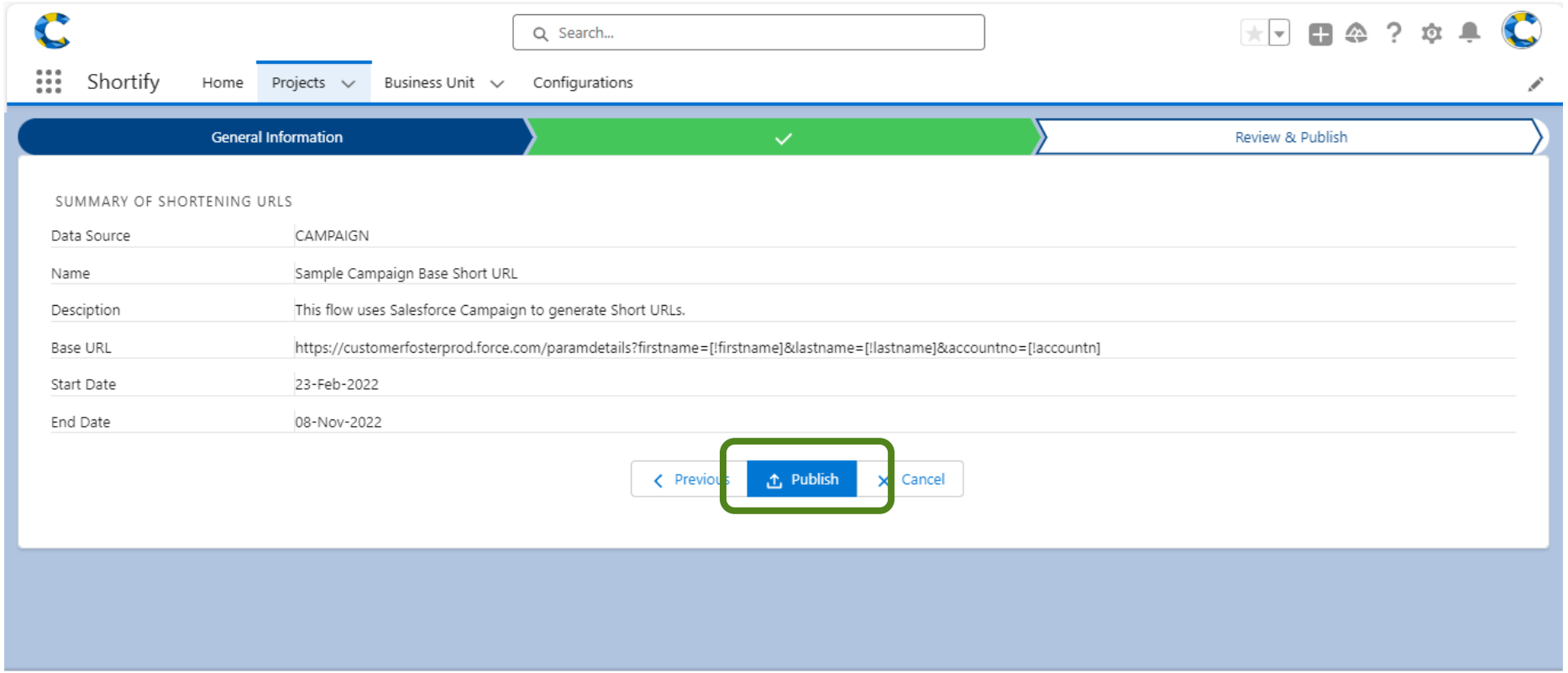
Based on Campaign Data - Step 2

- Map columns according to base URL tokens.
- Number of rows depends on the tokens defined in the URL
- Every URL token needs one Campaign data column mapping.



Based on Campaign Data - Step 3

- Validate all details and publish Short URL
- After completion of the process, you will receive an email with the final short URLs as an attachment



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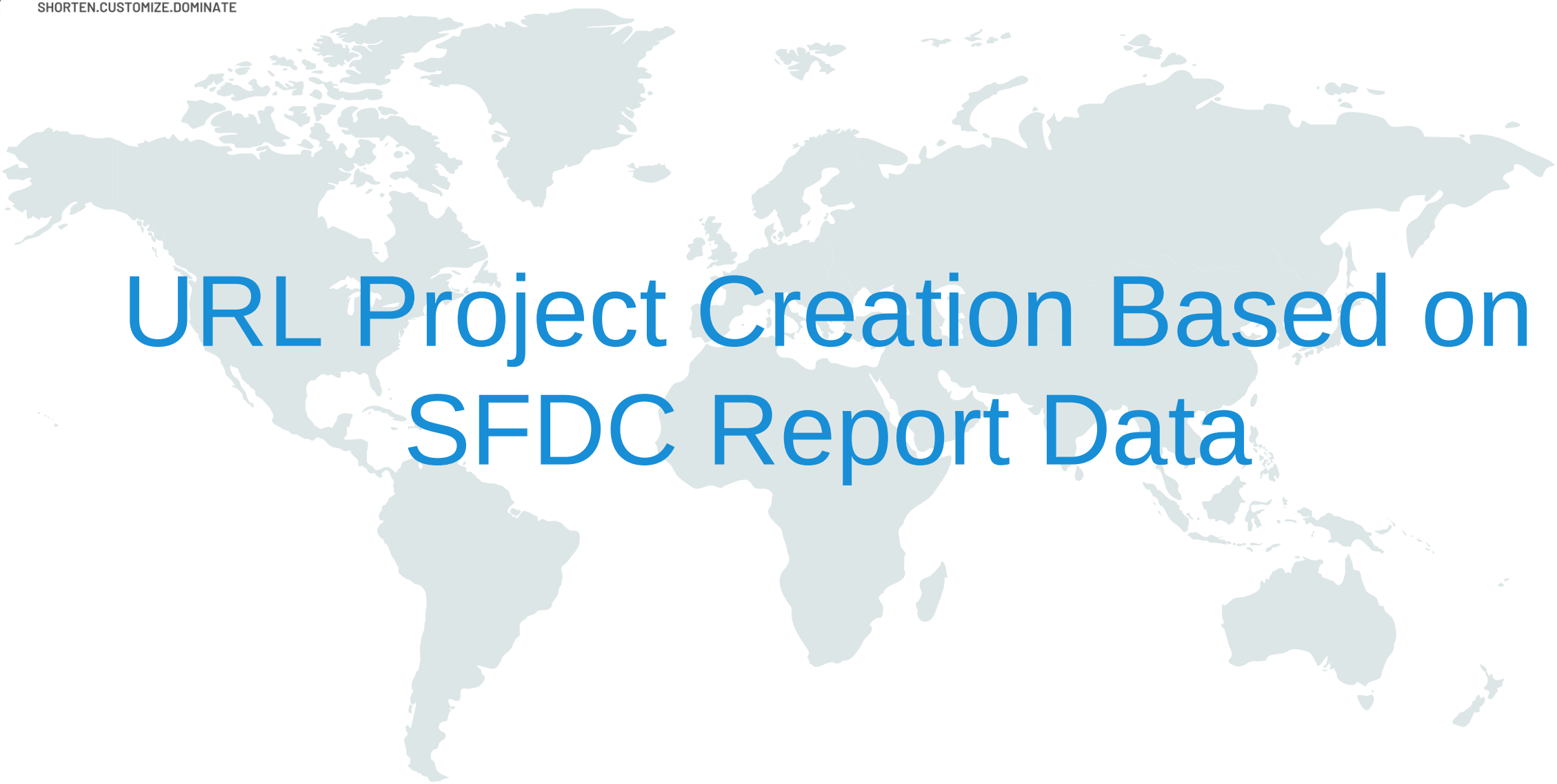
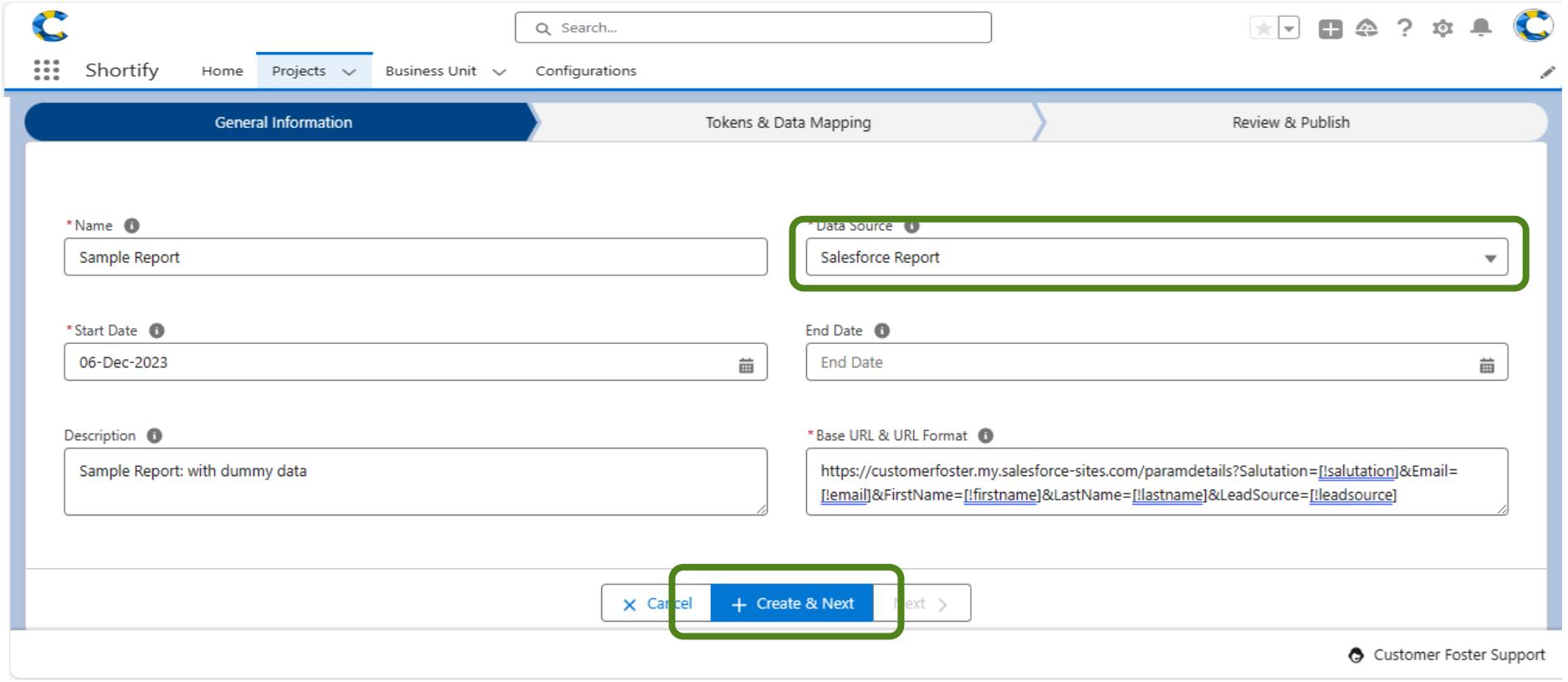


URL Project Creation Based on SFDC Report Data

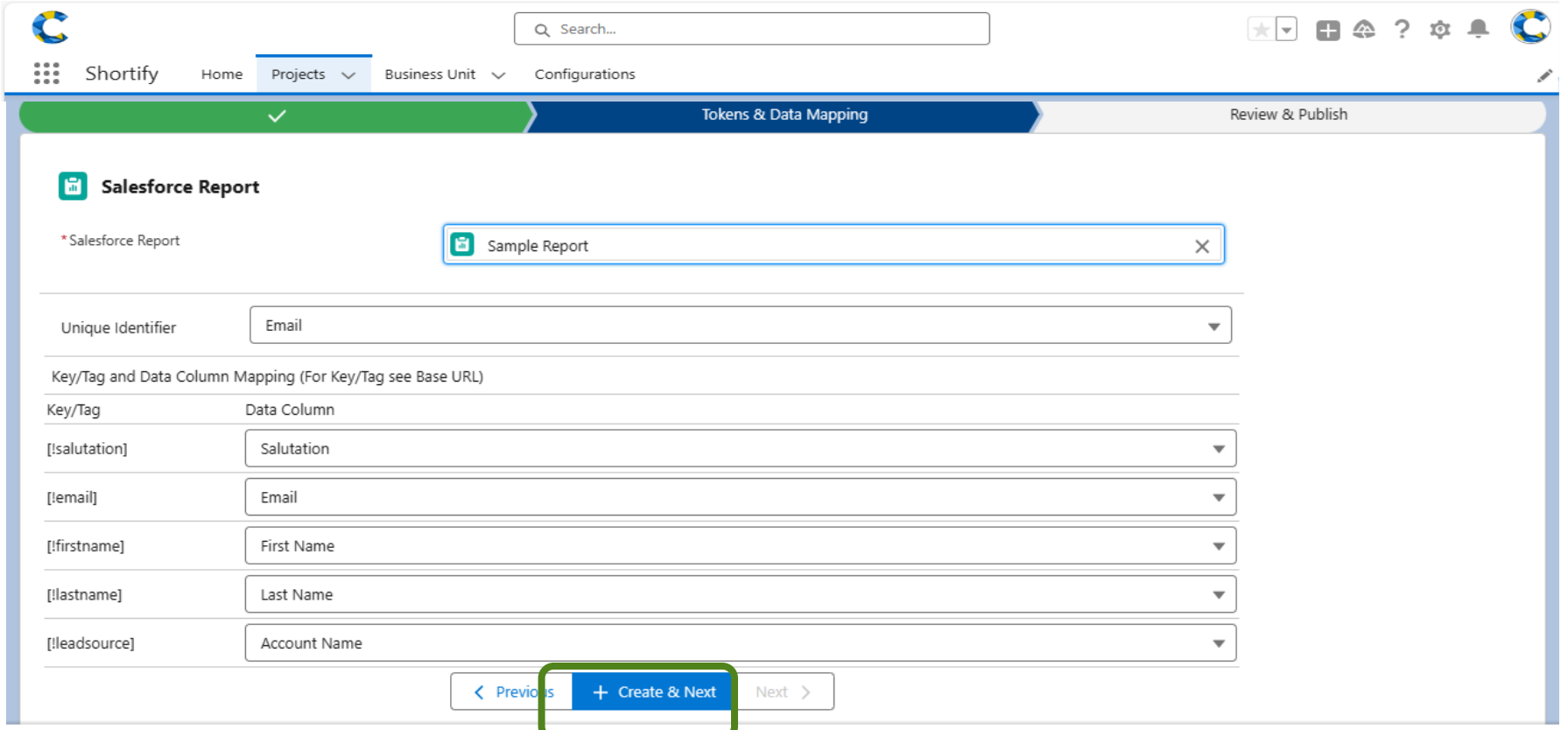
Based on SFDC Report Data - Step 1

- Select **Salesforce Report** as 'Data source'.
- Fill up other basic details.
- Provide the Base URL in 'Base UL & URL Format' with all personalization attributes/ token following the format of ([!PERSONALIZATION_TOKEN]). Based on the PERSONALIZATION_TOKEN name, matching data will be populated from the data source for each of the customer record.



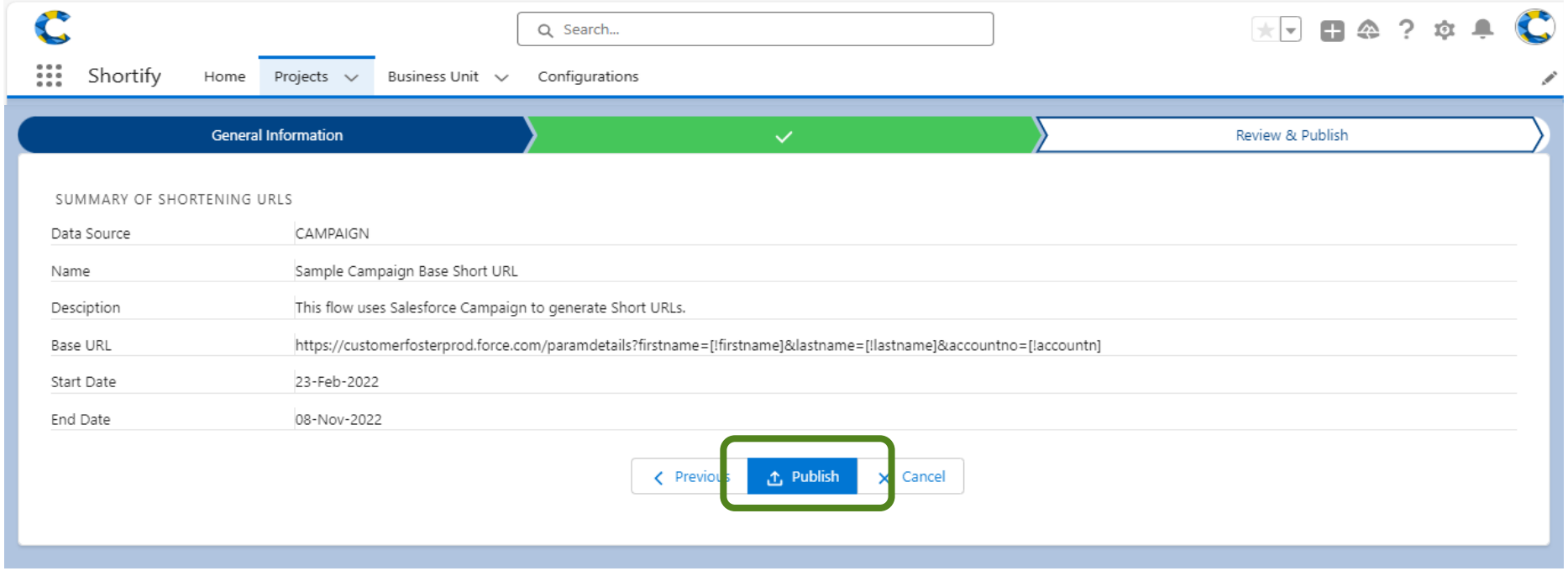
Based on SFDC Report Data - Step 2

- Map columns according to base URL tokens.
- Number of rows depends on the tokens defined in the URL
- Every URL token needs one Report data column mapping.



Based on SFDC Report Data - Step 3

- Validate all details and publish Short URL
- After completion of the process, you will receive an email with the final short URLs as an attachment



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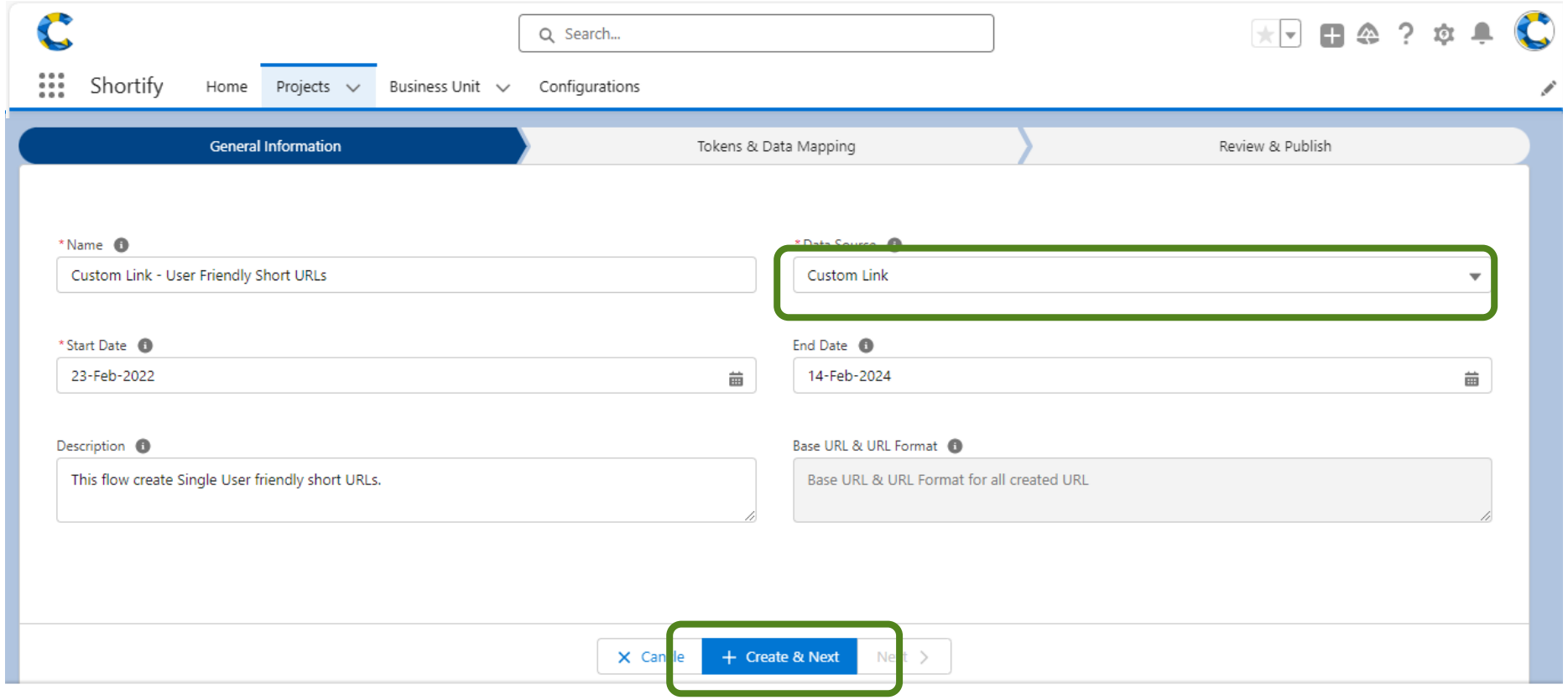
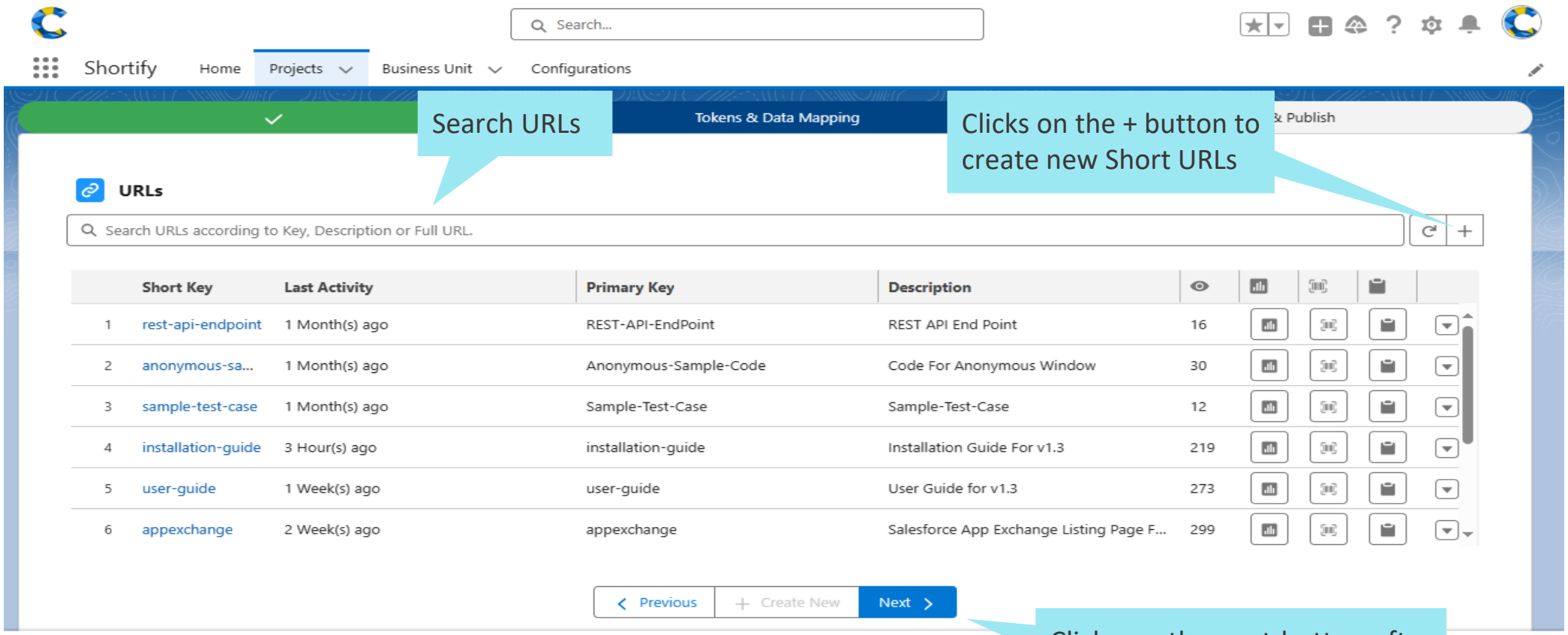
URL Project Creation for a Custom Link

Creation for a Custom Link – Step 1

- Select **Custom Link** as 'Data source'.
- Fill other basic details
- Base URL is not required for this option of Short URL generation

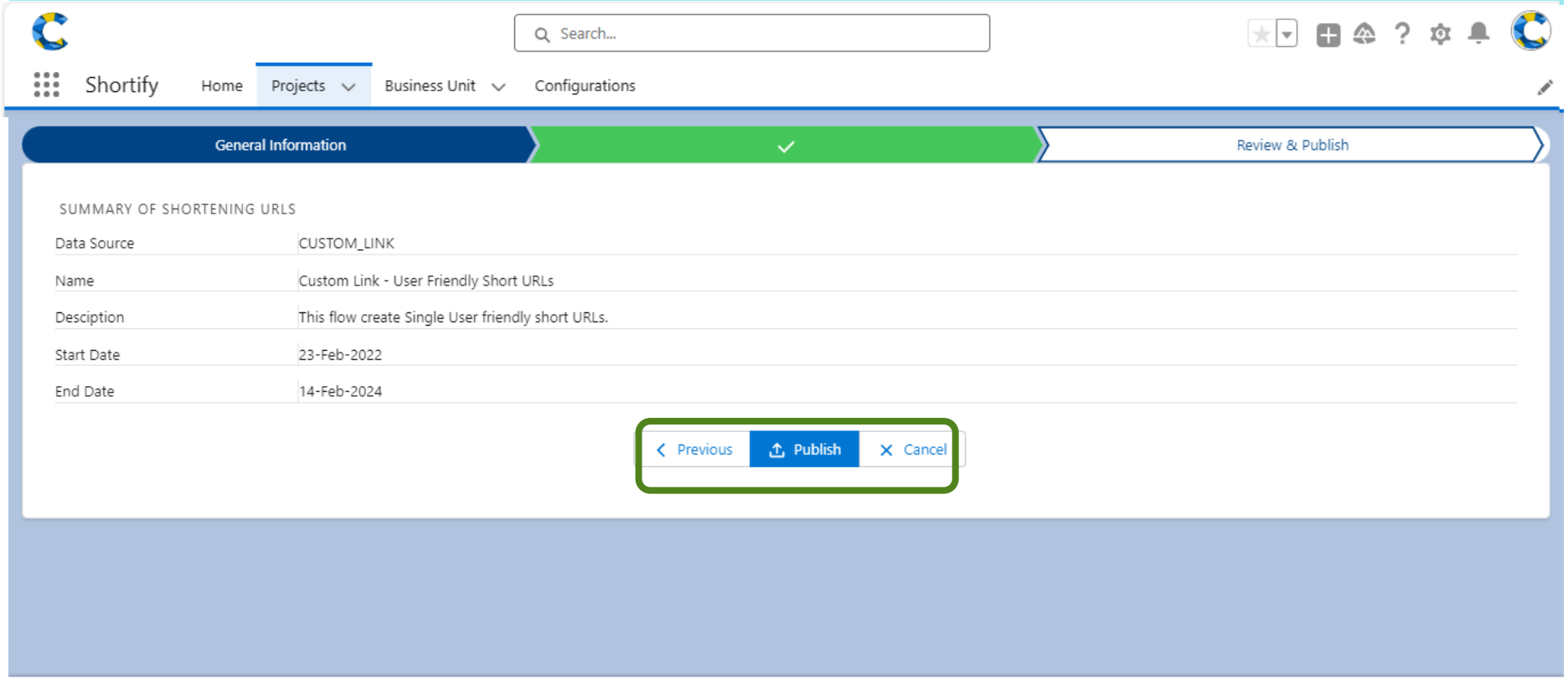


Creation for a Custom Link – Step 2

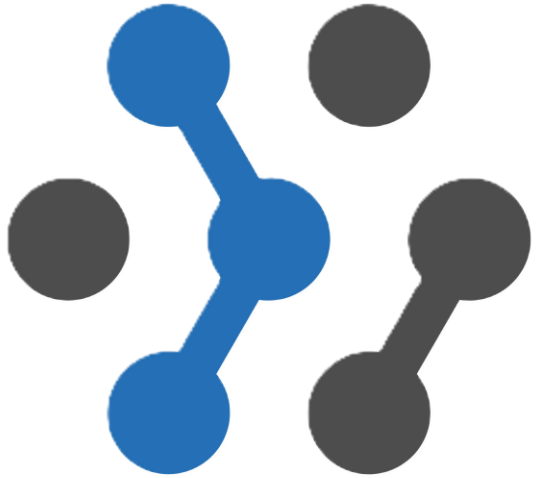


Creation for a Custom Link – Step 3

- Validate all details and publish Short URL
- Since it is a single Short URL, you will ***not*** receive any email for completion of short URL generation. After publishing, you may copy and use the Custom / User Friendly URL.



Thank You



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