

Fintactix Data Studio Analytics

Client Setup Guide — connecting your institution's own GA4 property to the Fintactix Data Studio dashboard template.

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Support: info@fintactix.com

Documentation Library: <https://www.fintactix.com/documentation>

1. Overview

As a Fintactix customer, you already receive a Fintactix-managed analytics dashboard showing your calculator engagement data. This guide is for institutions that also want their own internal copy of the dashboard, connected directly to their own Google Analytics 4 (GA4) property.

By following this guide, your team will have a fully independent analytics dashboard that you own and control — with no dependency on Fintactix for ongoing access. Your copy runs alongside the Fintactix-managed dashboard with no conflict; both receive data simultaneously.

What You Will Need	Details
Google Account	Any Google/Gmail account works
Existing GA4 Property	Or Fintactix will help you create one
GA4 Admin Access	Required to register the 6 custom dimensions
Fintactix Dashboard Template	Link provided by your Fintactix account team
Estimated Time	45–60 minutes, one-time setup

2. Google Analytics 4 Setup

2.1 Create or Identify Your GA4 Property

If your institution already has a GA4 property for your website, you can use it — skip ahead to § 2.2.

If you need a new property:

- Go to analytics.google.com and sign in with your Google account
- Click Admin (gear icon, bottom left) > Create > Property **[Your Institution Name] — Financial Calculators**
- Set your time zone and currency (USD), then click Next and Create

Action Required: Send your Measurement ID to your Fintactix account team. They will configure your calculator embed to send data to your GA4 property in addition to the Fintactix-managed property.

2.2 Register the Required Custom Dimensions

Display Name	Scope	Event Parameter	Description
Calculator Category	Event	calculator_category	Product series (Auto, Mortgage, Retirement)
Calculator ID	Event	calculator_id	Specific calculator identifier (a01, m01, r02)

Display Name	Scope	Event Parameter	Description
CTA Label	Event	cta_label	Visible text of the CTA link clicked
CTA Position	Event	cta_position	1-based position within the CTA block
CTA URL	Event	cta_url	Destination URL of the CTA link clicked
Tab Name	Event	calculator_tab_name	Results tab: Chart, Table, or Amortization

Note: Custom dimensions only capture data from the date they are registered onward — they do not backfill historical events. Complete this step before your calculators go live for best results.

2.3 Verify Data Is Flowing

After Fintactix has added your Measurement ID to the calculator embed:

- Go to GA4 > Reports > Realtime
- Navigate to a page on your website with a Fintactix calculator
- If no events appear after 2 minutes, contact your Fintactix account team

3. Data Studio Dashboard Setup

3.1 Copy the Fintactix Template

datastudio.google.com. When you open the link:

- Click File > Make a copy in the top menu
- In the copy dialog, click Change data source next to the Fintactix data source listed
- Select Google Analytics from the connector list
- Find and select your institution's GA4 property

[Your Institution Name] — Financial Calculator Analytics

- Click Copy report

Note: You must be signed into Google with an account that has at least Viewer access to your GA4 property for it to appear in the list.

3.2 Verify Your Dashboard

After copying, confirm all 7 report pages are loading correctly with your data:

Report Page	What to Verify
Calculator Engagement	Pivot table shows Views and Interactions columns with data

Report Page	What to Verify
Category Engagement	Category-level rollup shows your calculator categories
Email Results Conversion	Table loads (may be empty if no email results events yet)
Calculator Trends	Line chart shows date axis with activity data
CTA Click Conversions	Table loads (may be empty if no CTA click events yet)
Engagement Funnel	Four scorecards show totals for each engagement stage
CTA Conversion Report	Table shows CTA labels and click counts by category

3.3 Share With Your Team

- Click Share in the top right corner of Data Studio
- Click Manage access
- Add each team member's email address and set their role to Viewer
- Click Send

Security: Do not set the report to Public on the web. Keep sharing set to Restricted so only authorized team members can view your institution's calculator data.

4. Using Your Dashboard

Your dashboard updates automatically as your calculators are used. There is no manual refresh required. Data is typically current within a few hours of a calculator interaction.

Control	What It Does
Calculator Category dropdown	Filters all report pages to a specific product category
Calculator ID dropdown	Drills down to a single specific calculator
Date range control	Changes the reporting period (default: Last 28 days)
Page navigation (left side)	Switches between the 7 report pages

5. Support

If you encounter any issues during setup or have questions about your dashboard data, contact your Fintactix account team:

Email: info@fintactix.com

Documentation: <https://www.fintactix.com/documentation>

Reminder: Fintactix also maintains a separate Data Studio dashboard for your calculators. The dashboard you set up in this guide is your independent internal copy. Both dashboards receive the same calculator events simultaneously and neither affects the other.