

# Microsoft Clarity Instrumentation Checklist >

# Setup Checklist



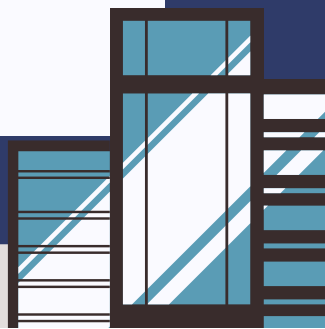
## INSTALLATION

- Is Microsoft Clarity installed on the website?
- Does the instrumentation meet the privacy standards required for industries that follow GDPR, DPA, and other regulations?



## SETTINGS

- Has a site category been selected for the Microsoft Clarity project? This selection can provide a valuable personalized report.
- Did you give your team permission to access Microsoft Clarity?
- Masking: Is the masking set to the lowest "balanced" masking level in the Microsoft Clarity project?
- Do you have internal traffic filtering configured?
- Is Copilot enabled for the Microsoft Clarity Project?



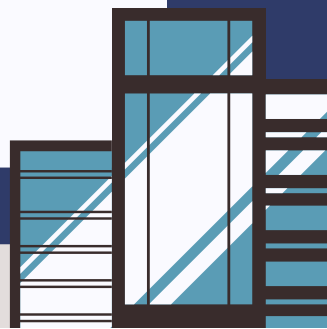
## INTEGRATION

- Is Google Analytics (GA4) Natively integrated with the Microsoft Clarity project?
- Is the native GA4 integration, complimented with a manual integration?
- Is the Microsoft Clarity custom dimension registered as a custom dimension in GA4?
- Is Piwik Pro integrated with the Microsoft Clarity Project?
- Is the Microsoft Clarity playback URL dimension registered in Piwik Pro?



## CUSTOM TAGS

- Does the Microsoft Clarity Project use Custom Tags?
- Is the page title part of the custom tags in the Microsoft Clarity Project?
- Is conversion action included in the list of custom tags in use?
- Is the content group configured using custom tags?
- Is the conversion type custom tag used in the Clarity project?
- Is the e-commerce action conversion included as a custom tag?
- Do you have the "Purchase" custom tag type?
- Do you have a userID type of custom tag?



## CUSTOM TAGS

- Do you have userType as a custom tag in the Microsoft Clarity project?
- Do you have the website error type of the custom tag used in the Microsoft Clarity project?
- Are there any missing custom tags that will be useful for reporting segmentation?
- Are there any custom tag instrumentation issues or mistakes?



## CUSTOM IDENTIFIERS

- Are custom Identifiers configured for the Microsoft Project? (this part of the setup is optional but essential when trying to track users in the project efficiently)
- Is user tracking by user ID configured? (do this for a website that has a login system)
- Does the Microsoft Clarity Identify API only get called when the userID is available?
- Is UserID omitted in the list of parameters sent through the Microsoft Clarity identify API?



## USEFUL LINKS

Content Grouping In Microsoft Clarity (The Setup + Analysis)

[Read Here](#) ➔

10 Innovative Ways To Use Custom Tags In Microsoft Clarity

[Read Here](#) ➔

Linking Session Recording Tools With Piwik Pro, GA4, Mixpanel, And Amplitude

[Read Here](#) ➔

Understanding the Concept of "Custom Tags In Microsoft Clarity

[Read Here](#) ➔

Microsoft Clarity Complete Guide

[Read Here](#) ➔

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