

Microsoft Clarity Instrumentation Checklist >

Setup Checklist



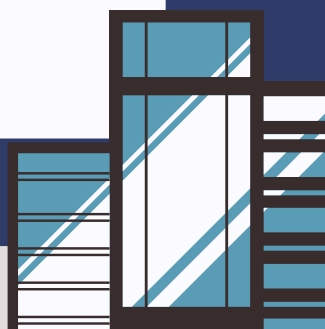
INSTALLATION

- ☐ 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?



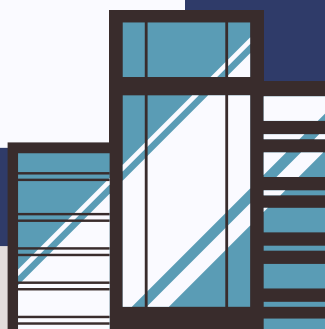
INTEGRATION

- ☐ 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?
- ☐ Is Google Ads integrated with your Microsoft Clarity project?
- ☐ Connect Clarity and your experimentation tool



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?
- ☐ Are e-commerce-related custom tags utilized in the project?
- ☐ Do you have the "Purchase" custom tag type?



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?
- ☐ Do you have a userID type of custom tag?



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?



SMART EVENTS

- ☐ Is smart event configured for the Microsoft Clarity project?
- ☐ Are there any broken smart events in the Microsoft Clarity project?
- ☐ Is there any smart event absent from the list of existing smart events in the Clarity project?
- ☐ Is there any smart event that hasn't received data lately?



CONTENT INSIGHTS

- ☐ Is "Content Insights" set up on your website to measure content performance?
- ☐ Is "Content Insights" correctly configured for your Microsoft Clarity project? Automatic setups may include non-article/blog post pages.

CLARITY LABELS

**This comes while you are using Clarity*

- ☐ Are you using Clarity labels?
- ☐ Are you using Custom Labels in your Clarity project?



FUNNELS

- ☐ Have you set up funnels in your Microsoft Clarity project?
- ☐ Are any of the funnels not correctly configured in the project?
- ☐ Are there any missing funnels that should be added to the Clarity project?
- ☐ Are the "Smart Events" used for the funnel configuration-based validation?



USEFUL RESOURCES

- ☐ Document your Microsoft Clarity setup
[Access Here ➡](#)
- ☐ Audit and rate your Microsoft Clarity implementation and usage
[Access Here ➡](#)
- ☐ Microsoft Clarity eCommerce + Purchase Tracking Template
[Access Here ➡](#)



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 ➡](#)

Integrate Microsoft Clarity & GA4

[Read Here ➡](#)

Smart Events In Microsoft Clarity: Everything You Need To Know About Event Tracking In Clarity

[Read Here ➡](#)

[**VISIT DUMBDATA➡**](#)

More 

We've got lots of FREE Resources that you'll love 🍕

USEFUL LINKS

A Step-by-Step Guide to Setting Up E-commerce Tracking in Microsoft Clarity

[Read Here ➡](#)

Funnels In Microsoft Clarity: Everything You Should Know + Useful Tips

[Read Here ➡](#)

How To Filter By UTMs and Exclusive GA4 UTMs In Microsoft Clarity

[Read Here ➡](#)

Copilot in Microsoft Clarity: Everything About Its AI Capability + Strategic Usage Tips

[Read Here ➡](#)

19 Questions About Microsoft Clarity Smart Events

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Microsoft Clarity eCommerce + Purchase Tracking Template

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