VENDOR ASSESSMENT CHECKLIST

All your campaign tracking links in one place.

Automated governance. Connected workflows. And more.

Choose a UTM governance platform with the features your team needs. This checklist saves evaluation time, covers critical requirements, and helps you compare vendors to make an informed decision.

Explore the checklist

Click a section to jump to its checklist.

1 **Campaign naming & tag rules**
Libraries, templates, formatting, and forbidden elements

2 **Workspaces, permissions & usage**
Granular access, component visibility, and usage reports

3 **Builders, integrations & reporting**
Web app, CSV, browser extensions, and ChatGPT

4 **Short links, QR codes & reporting**
Built-in tools, branded domains, clicks, and scans

5 **API, pricing & paid-media extras**
Call limits, ownership, macros, and naming outputs

6 **Connected workflows across platforms**
Connect Salesforce, Workfront, Marketo, and more

7 **Compare three vendors using the weighted scorecard**

CAMPAIGN TRACKING LINK BUILDER SOFTWARE

Campaign naming & tag rules

Save time comparing UTM governance platforms. This checklist brings the critical features, controls, and questions together so you can spot gaps, compare vendors consistently, and make an informed decision. Tick each requirement as you verify it.

- [ ] **Choose how to build utm_campaign**
  Can users **type the campaign name**, keep a friendly display name and **generate the UTM name from tags**, generate both names from tags, or **use a centrally managed naming convention**? Ask to see your preferred option on the proposed plan. CampaignTrackly's four naming options.

- [ ] **Campaign naming templates**
  Clone a saved format and reuse the field order. Try year, month, region, subcampaign, and a permitted free-text value. Check whether a field can also be sent as a separate URL parameter.

- [ ] **Tagging templates**
  Use one landing page for several channels. Prefill pairs like **newsletter / email** and **linkedin / paid-social**, enter the remaining Content tag, and create the tracking links together.

- [ ] **Approved tag libraries**
  Look for approved Source/Medium pairs and custom values like region or audience. Check who can add a value and which workspaces can use it.

- [ ] **Formatting rules and exceptions**
  Can you require lowercase and a separator, such as a hyphen? Test a partner ID that must keep its original case and a field that needs underscores.

- [ ] **Forbidden elements**
  Try a forbidden character or a test email address. Does the tool warn you or block the save?

- [ ] **Check a real naming pattern**
  Preview the final name in a URL. Example campaign value **2026-11-na-launch-demo-v2**.

ACCESS & USAGE

Workspaces, permissions & usage

Check what an account admin and a regular member can see and do. Repeat the test in a second workspace.

- [ ] **Granular access for admins and members**
  Ask how many levels of access you can configure. Test who can invite users, change rules, edit the tag library, build or edit links, and view or export reports.

- [ ] **Multiple workspaces**
  Create two workspaces under one account. Check who can switch between them, which templates and tags can be shared, and which campaigns should stay private to each team.

- [ ] **Show or hide components**
  Ask whether admins can show or hide builder fields, menus, or tools for a team or role. Sign in as a member to confirm the screen and available actions.

- [ ] **Governance reports and user utilization**
  Ask which reports show who is using the tool, who creates campaigns or links, and which workspaces use it most. Check whether you can filter by user or team and export the results.

What CampaignTrackly offers

CampaignTrackly provides four levels of granular access control, multiple workspaces, options to show or hide components, and usage reporting. Review enterprise team setup and usage reports. Ask to see an admin view and a member view for your setup.

VENDOR / PLAN

PERMISSIONS OR REPORTS TO VERIFY

BUILDERS

Builders, integrations & reporting

Try an approved Source/Medium pair and a value outside your library. Check what each builder lets users save.

- [ ] **Web app builder**
  Choose a template, preview the full tracking link, and find it again after saving.

- [ ] **Browser extension**
  Build a link from an open page. Check whether your approved tags and templates are available in the browser your team uses.

- [ ] **Bulk CSV upload builder**
  Upload a sheet with a bad tag or URL. Look for row-level errors, editing in the table, and validation before saving.

- [ ] **ChatGPT builder**
  Connect a test workspace. Try an unapproved tag, then see whether you can review the link before saving.

- [ ] **Integrated Builder (from tools like Salesforce)**
  Can users start in Salesforce and get a tracking link back on the campaign record? CampaignTrackly supports workflows across 100+ platforms. Check which integrations support link building.

- [ ] **Connected workflows**
  Can one action set off several steps across your tools? See the connected workflow checklist at the end and ask how your systems can work together.

SHORT LINKS & QR

Short links, QR codes & reporting

Build one tagged URL, shorten it, and generate its QR code. Open the short link and scan the code on a phone.

- [ ] **Integrated shortener**
  Can users shorten a tagged link in the same builder? Check that the short URL opens the right destination and preserves the campaign tags.

- [ ] **Vendor domain or a vanity domain you own**
  Can you choose between the vendor's short domain and a branded domain you own? Check who controls DNS and how your short-link and QR redirects can stay live if you switch vendors.

- [ ] **Automatic QR generation**
  Can the tool create a QR code when you build a tagged link, without opening another tool? Ask which plans support automatic and bulk generation.

- [ ] **Short-link click reporting**
  Click a test short link. Check whether it appears in the click report and whether you can see it by campaign and across the account.

- [ ] **QR-code scan reporting**
  Scan a code and verify that it appears in reporting. Check campaign and account views, date ranges, and whether scan data can be exported.

- [ ] **Link and campaign data exports**
  Check which link and campaign fields you can download, in what format, and by which deadline if you leave.

What CampaignTrackly offers

CampaignTrackly includes the Ctrly.io shortener, support for a vanity domain you own, automatic QR code creation, and click and scan reports at campaign and account level. Review the shortener, QR code, and vanity domain guide.

API & EXTRAS

API, pricing & paid-media extras

Compare quotes using the same workload. If you run paid media, bring an example of the names and tracking values you need.

- [ ] **API calls and limits**
  An API call is one request to create or retrieve data. Ask which actions are included, how many calls you get per minute and per billing period, and how batches, retries, and overages count.

- [ ] **Normal-month and peak-month quotes**
  Use the same seats, workspaces, short links, QR codes, and API calls for every vendor. Ask about setup, domain fees, QR scans, add-ons, overages, and renewal.

EXAMPLE API WORKLOAD

One request per link means 200 links + 50 report requests = **250 calls per day** or **5,000 calls over 20 workdays**, before retries.

EXTRAS FOR PAID MEDIA TEAMS

- [ ] **Content composites**
  Can ad type, size, and version become **utm_content**, for example **banner_300x250_v2**? Leave a required value blank to see what happens. Check how **utm_term** is filled for paid search.

- [ ] **Dynamic macros**
  Test a placeholder such as Google Ads {campaignid}. Open a test click and check whether the landing URL contains the actual campaign ID.

- [ ] **Names and export fields**
  For Campaign Manager 360 (CM360), check campaign, placement, ad, and creative names. Ask for the export fields you need for DV360, Search, or Performance Max.

Optional demo prep

Send your tag rules, expected links, and paid-media naming sheet ahead of time. Schedule a CampaignTrackly demo.

WORKFLOWS

Can it integrate across multiple platforms?

Connect the tools your team works in and automate the steps between them, from campaign setup to finished tracking links.

Can the platform automate your whole workflow?

CampaignTrackly builds connected workflows across **100+ platforms**. Ask how tools such as Salesforce, Adobe Workfront, and Marketo can work together to create campaigns, build links, and share metadata.

ILLUSTRATIVE WORKFLOW TO ASSESS WITH THE VENDOR

Salesforce	>	Workfront	>	CampaignTrackly	>	Marketo
A campaign is created		Project details are added		Governed links are built		Links reach the marketing team

Ask which steps can be automated in your setup and what configuration is included.

Triggers and multiple steps

Can an action in one tool start the workflow, create or update records in another, and return links and campaign metadata? Ask to see the sequence your team needs.

Rules, monitoring, and recovery

Do the approved tags and naming rules apply inside the workflow? Check where you can see failed steps, who is alerted, and how retries avoid duplicate campaigns or links.

GA4 campaign reporting

Find a campaign in GA4. Check whether the tool flags missing tags or paid traffic in the wrong channel and gives you a specific fix.

Custom workflow development

Ask CampaignTrackly to map your process across the systems you use. Confirm what can be built at no extra charge, what needs a quote, and who maintains it.

SCORECARD

Compare three vendors

Set your must-haves before scoring. Give 1 point for each verified item, 2 for a verified must-have, and 0 when missing or unverified.

VENDOR A NAME	VENDOR B NAME	VENDOR C NAME

What you verified	Must-have	Vendor A	Vendor B	Vendor C
Choose how to build utm_campaign	☐			
Campaign naming templates	☐			
Multi-channel tagging templates	☐			
Approved tag libraries	☐			
Formatting rules and exceptions	☐			
Forbidden elements	☐			
Your naming pattern works in a URL	☐			
Admin and member access controls	☐			
Multiple workspaces	☐			
Show or hide components	☐			
Usage and governance reports	☐			
Web app builder	☐			
Browser extension	☐			
Bulk CSV upload builder	☐			
ChatGPT builder	☐			
Integrated Builder, such as Salesforce	☐			
Connected tools and workflows	☐			

Example: a verified must-have vanity domain earns 2 points. Missing or unverified earns 0 and counts as a gap.

SCORECARD

Scores, gaps & your decision

Continue the comparison using Vendor A, B, and C from the previous page. Add points manually in your PDF reader or on paper.

What you verified	Must-have	Vendor A	Vendor B	Vendor C
Integrated shortener	☐			
Your own vanity domain	☐			
Automatic QR generation	☐			
Short-link click reporting	☐			
QR-code scan reporting	☐			
Link and campaign data exports	☐			
API actions, calls, and limits	☐			
Plan, peak usage, and pricing terms	☐			
Content composites	☐			
Dynamic macros	☐			
Paid-media names and export fields	☐			
Workflows across multiple platforms	☐			
Triggers and multiple steps	☐			
Workflow rules and failed-step recovery	☐			
GA4 campaign reporting	☐			
Custom workflow development	☐			

Vendor A

Points _____ Must-have gaps _____

Vendor B

Points _____ Must-have gaps _____

Vendor C

Points _____ Must-have gaps _____

Make the decision. Resolve must-have gaps first. Then compare total points and confirm the written quote and open questions. Use the same must-haves for every vendor. Leave a row blank for all three if you don't need it.