



# Get omnichannel-ready on Meta

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Connect online + in-store conversions  
with CAPI-Offline

**( setup playbook )**



## When channels **don't connect**

Customers move between digital and physical touchpoints. Many discover online, then buy in-store (or the other way around). If you optimize and measure only website purchases, you risk missing the real impact of your Meta ads.

### Who's typically affected

Businesses that sell online and in-store, especially:

- retail
- automotive
- telecommunications
- restaurants
- travel/hospitality

**40%**

of customers use  
3–5 channels  
before buying.<sup>1</sup>

**73%**

expect real-time  
visibility into both  
online and in-store  
inventory.<sup>2</sup>

**43%**

of brands effectively  
use omnichannel  
strategies.<sup>1</sup>

1. NewStore, Omnichannel Leadership Report, March 2024

2. PYMNTS, Global Digital Shopping Index: U.S. Edition, 2024

# Meta's omnichannel solution

Omnichannel Ads is a Meta optimization approach that lets you drive **website and in-store purchases in one Sales campaign** – instead of splitting budgets and learning across separate campaigns.

## What it unlocks



### Drive customers to nearby stores

Reach local audiences and guide them to stores



### Showcase local inventory

Location-based product availability where applicable



### Optimize toward high-value outcomes

Prioritize store or website conversions

Early tests show **improved efficiency and incremental impact** for omnichannel businesses:

# 15%

lower median cost per result vs website-only optimization<sup>3</sup>

# 34%

higher ROI on average<sup>4</sup>

# 21%

higher store incremental ROAS<sup>5</sup>

### Note:

Feature availability varies by market and account eligibility; check Ads Manager/your representative for enablement.

3. Statistical meta-analysis of 27 (for omnichannel) and 25 (for offline) split studies that ran between October 2024 and March 2025 from global retail advertisers that passed QA.

4. Analytic Partners, ROI Genome Intelligence report, Omnichannel and a brave new world, 2021.

5. Statistical meta-analysis of 19 (for omnichannel) and 17 (for offline) conversion lift studies that ran between October 2024 and March 2025 from global retail advertisers that passed QA.

# Your omnichannel rollout plan

Use this journey to plan implementation and align marketing + analytics + engineering.

## Establish data connections

Define your integration path and data sources (POS/CRM + web).

## Strengthen data quality

Ensure data freshness, accuracy, and compliance so Meta can use your signals reliably.

## Set up the campaign

Create a Sales campaign and select Website and in-store as your conversion location.

## Test and measure

Validate signal health and measurement, then compare against your baseline campaigns.

## Omnichannel eligibility requirements

To run Omnichannel Ads, Meta may require the following. Requirements can evolve – use Events Manager and Ads Manager eligibility prompts as the source of truth.

- Offline signals via Conversions API for offline events (CAPI-Offline)**  
A reliable, ongoing feed of offline purchase events is typically required. Manual uploads may not meet eligibility requirements.
- Offline Data Quality score threshold**  
At the time of writing, a minimum [Offline Data Quality Score](#) (e.g., 8.5+) may be required. This threshold can change as the product evolves.
- Online signals (website)**  
To meet the online signal requirement, you can use Meta Pixel (web). For better reliability and coverage, we recommend using Pixel + web Conversions API.
- Datasets connected to the ad account**  
Your offline dataset must be connected to the ad account used for omnichannel campaigns.

**In this playbook:** we'll show you how to set up **CAPI-Offline** and launch Omnichannel Ads step by step. If you still need to set up your **online (website) signals**, see [our tracking guide](#).

# Conversions API for offline events

CAPI for offline events is a server-to-server integration that reports conversions that happen outside your website (for example, in-store purchases). It sends data from your POS or CRM directly to Meta so offline outcomes can be used for measurement and optimization.

## What CAPI-Offline unlocks

- Capture offline impact (in-store, phone, or CRM outcomes)
- Improve optimization with more complete conversion signals
- Build stronger audiences for retargeting and lookalikes
- Increase lead quality by sending CRM outcomes (qualified/booked/converted)

**3.5x**

Omnichannel iROAS reported in Meta case studies<sup>6</sup>

**1.8x**

Offline iROAS reported in Meta case studies<sup>6</sup>

**2x**

reported impact after sharing offline data via CAPI (Sofology)<sup>7</sup>

6. Meta case study Oct–Nov 2024

7. Meta case study Jul–Aug 2024

# Setup options

Method	Opt for the method if you are	Setup complexity	Find out more about the method
Stape CRM Apps <i>easiest</i>	<p><b>using one of the CRMs:</b> HubSpot, Salesforce, Pipedrive, Zoho, and HighLevel</p> <p><b>planning/already configured</b> server-side tracking solution for website</p>	Low	<p><a href="#">Stape's Conversion tracking apps: use cases and benefits</a></p> <p><a href="#">List of currently available apps</a></p>
Webhooks via sGTM <i>flexible</i>	<p><b>using the CRM</b> not presented on the list above</p> <p><b>using POS</b>, or a custom solution</p> <p><b>not going to implement</b> a server-side tracking solution for website tracking</p>	Medium	<p><a href="#">Facebook offline conversion using server GTM</a></p> <p><a href="#">What are webhooks, and how to use them</a></p>

## Privacy & consent note:

Before sending offline customer data (POS/CRM) to Meta, confirm your consent/legal basis and data-sharing policies (e.g., GDPR/CCPA). Share only the fields you're permitted to use, and follow your Events Manager prompts.



**Omnichannel  
campaign  
configuration  
step-by-step**

## Step 1

# Configure offline conversions

Customers move between digital and physical touchpoints. Many discover online, then buy in-store (or the other way around). If you optimize and measure only website purchases, you risk missing the real impact of your Meta ads.

## Option A

### Stape Conversion Tracking CRM Apps

#### Prerequisites

- [Stape account](#)
- One of the supported CRMs: HubSpot, Salesforce, Pipedrive, Zoho, HighLevel
- Your server-side setup in place

#### How to configure <sup>overview</sup>

1. Install the app and authorize the CRM connection
2. Connect & authenticate (add keys and Meta details in Stape)
3. Map events (match CRM outcomes to Meta events)

#### CRM app setup guides

- [Stape's Conversion Tracking CRM Apps: use cases and benefits](#)
- **Hubspot** → [install](#) [setup guide](#)
- **Salesforce** → [install](#) [setup guide](#)
- **Pipedrive** → [install](#) [setup guide](#)
- **Zoho** → [install](#) [setup guide](#)
- **HighLevel** → [install](#) [setup guide](#)

## Option B

### Send via webhooks (POS / custom systems)

#### Prerequisites

- [Stape account](#)
- Web + server GTM container configured [[setup guide](#)]
- Custom domain configured [[setup guide](#)]
- A CMS/CRM/POS that can send webhooks

#### Overview steps

1. Configure webhooks to send purchase events to your server container
2. Receive and parse webhook requests
3. Map fields to the Meta CAPI offline event format and test in preview mode
4. Launch and monitor dataset diagnostics

*using Stape CMS apps*

#### Examples

- [Webhook setup example \(WooCommerce/Stape app\)](#)
- [List of Stape CMS apps with webhook support](#)

#### Note:

If your platform isn't on the list, you can usually still set up a webhook using its native automation/webhook features – use the example above as a reference for what to send and where to send it.

[Create a free Stape account](#)

## Step 2

# Connect the required datasets to the ad account

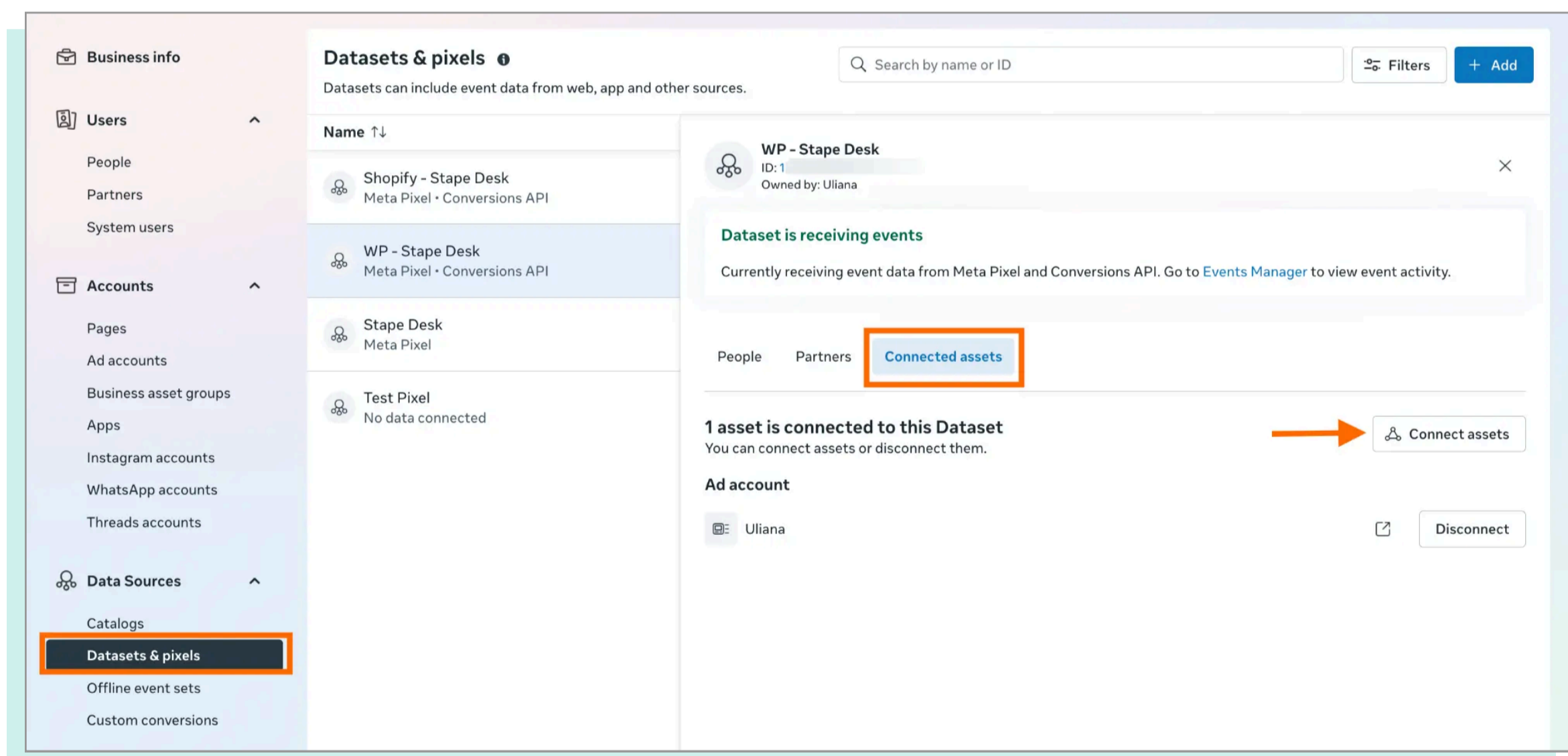
Connecting datasets is required so Meta can use your offline events for attribution and optimization while running Omnichannel Ads.

When you connect the dataset to your ad account, you give Meta permission to match your offline customer data (for example, hashed identifiers from POS/CRM) to people who interacted with your ads.

*Meta Business Settings*

### Where to do it

1. Open **Meta Business Settings**
2. Go to **Data Sources** → **Datasets & pixels**
3. Select the dataset receiving your **offline events**
4. Open **Connected assets**
5. Click **Connect assets**, choose the ad account, and click **Add**



### Tips:

- If you have both web and offline datasets, use the dataset(s) that correspond to the signals you plan to use in the campaign.
- Match quality can vary – send strong identifiers where permitted and monitor dataset diagnostics in Events Manager.

## Step 3

# Check your Offline Data Quality Score

To be eligible for Omnichannel Ads, Meta may require a minimum **Offline Data Quality Score** (at the time of writing, this is often shown as **8.5+**). This threshold can change as the product evolves – use **Events Manager eligibility prompts** as the source of truth.

### Note:

Omnichannel campaigns also require a consistent online (website) signal. At a minimum, you should have **Meta Pixel** configured.

[If you don't, use our web tracking guide](#)

### Events Manager

#### How to check your score

1. Open **Events Manager**.
2. Go to **Overview** and select the dataset receiving your offline events.
3. Open the relevant offline conversion event and click **View details**.
4. In the pop-up, go to the **Event Quality** tab.
5. Review your **Offline Data Quality Score**.

The screenshot shows the Meta Events Manager interface. The top navigation bar includes 'Connect data', 'Overview', 'Datasets', 'Custom conversions', and 'Integrations'. The 'Datasets' tab is selected. The main content area shows the 'Purchase' event details, including 'Advanced matching activity' and 'Parameters'. The 'View details' button is highlighted. Below the main content, the 'Event Quality' tab is selected, showing the 'Event quality' section with a score of 4.3/10 for 'Offline data quality' and 7.4/10 for 'Event match quality'. The 'Offline data quality' score is highlighted with a red box. A tooltip explains the score and provides recommendations: 'Consider sharing more user identifiers (hashed email, phone, etc.)' and 'Reduce data processing time for offline uploads'.

bonus

## How to improve your score

If your Offline Data Quality Score is below the recommended threshold, focus on the basics first: **how consistently you send events, how fresh the data is, and whether the dataset is error-free.**

Frequency

Freshness

Attribution

Accuracy

Purchase value

Enhanced

### What to fix first

#### 1. Fix data freshness (most common issue)

- Ensure offline events are sent **continuously** (or on a frequent schedule)
- Avoid batching or rules that delay events coming from POS/CRM
- Aim to keep offline transaction data **no older than ~3.5 days**

#### 2. Enable auto-tracking for offline events (where available)

In Meta Events Manager:

Events Manager → **Overview** → select your dataset → **Settings** → **Auto tracking** → Select an **ad account** → toggle **Auto-tracking** ON.

#### 3. Validate the offline data you send

Check the most common formatting and field requirements:

- **Customer info (recommended):** email, phone (and where available: first name, last name)
- **Formatting:** lowercase emails; phones in E.164; hash identifiers (SHA-256) before sending (Stape CRM Apps handle this by default)
- **Purchase fields:** event\_name, event\_time, action\_source (physical\_store), plus currency + value (required for purchase) and value > 0
- **Optional (recommended for catalogs):** contents / content\_ids
- **Avoid basket splitting:** don't split one transaction into multiple purchase events
- **Web-only note:** if you also send web events via CAPI, include recommended web match keys (e.g., IP, user agent, fbp/fbc) to improve web EMQ.

Learn more: [Omnichannel optimal setup guide](#)

#### 4. Monitor dataset health and fix errors

Events Manager → Dataset → Diagnostics

If you see warnings/errors, fix them and re-check the score trend.

## Step 4

# Create an Omnichannel campaign in Meta Ads

Once your offline events are flowing and your score meets the eligibility prompts in Events Manager, you can launch an Omnichannel campaign in Ads Manager.

### Quick setup *Ads Manager*

1. Go to **Ads Manager** and click **Create**
2. Select **Sales** as your campaign objective
3. At the ad set level, choose **Conversion location: Website and in-store** (or Website, app, and in-store if available in your setup)
4. Under **Dataset**, select the dataset that receives your offline events
5. Publish the campaign

### Notes:

1. Purchase is typically selected as the default conversion event for omnichannel optimization.
2. If you use a product catalog, you may be able to enable Advantage+ catalog ads for dynamic product delivery.
3. Availability and options vary by market and account eligibility – follow Ads Manager prompts.

For more details on the omnichannel campaign configuration, [check Meta's documentation.](#)

## Step 5

# Test and measure performance

After launch, validate that signals are flowing correctly and the measurement is stable. This helps you avoid optimizing on incomplete data and makes results easier to interpret.

## What to check first



### Offline signal health

Makes cookies last longer, even with browser restrictions.



### Dataset diagnostics

Resolve any warnings/errors in Events Manager



### Store-related info (if used)

Confirm store/inventory details are accurate and up to date

### Note:

Signal quality may take up to 48 hours to stabilize after launching or making major changes.

## How to evaluate impact

Don't rely on a single week of results. Treat it as a controlled comparison:

- Run Omnichannel Ads alongside your current setup (web-only or separate store campaigns)
- Compare efficiency and incremental impact against your baseline
- Keep creative, budgets, and measurement windows consistent where possible

# Best practices for Omnichannel Ads

Once your setup is live, these practices help you get clearer results and smoother optimization.

## 1 **Use Conversions API for both online and offline** *recommended*

Omnichannel campaigns can work with Pixel-only web tracking, but adding **web Conversions API** alongside Pixel can make signals more resilient and complete.

[Web Conversions API setup guide](#)

## 2 **Use Advantage+ catalog ads** *if you have a catalog*

If you sell many products, Advantage+ catalog ads can help deliver more personalized product recommendations with less manual setup.

[About Meta Advantage+ catalog ads](#)

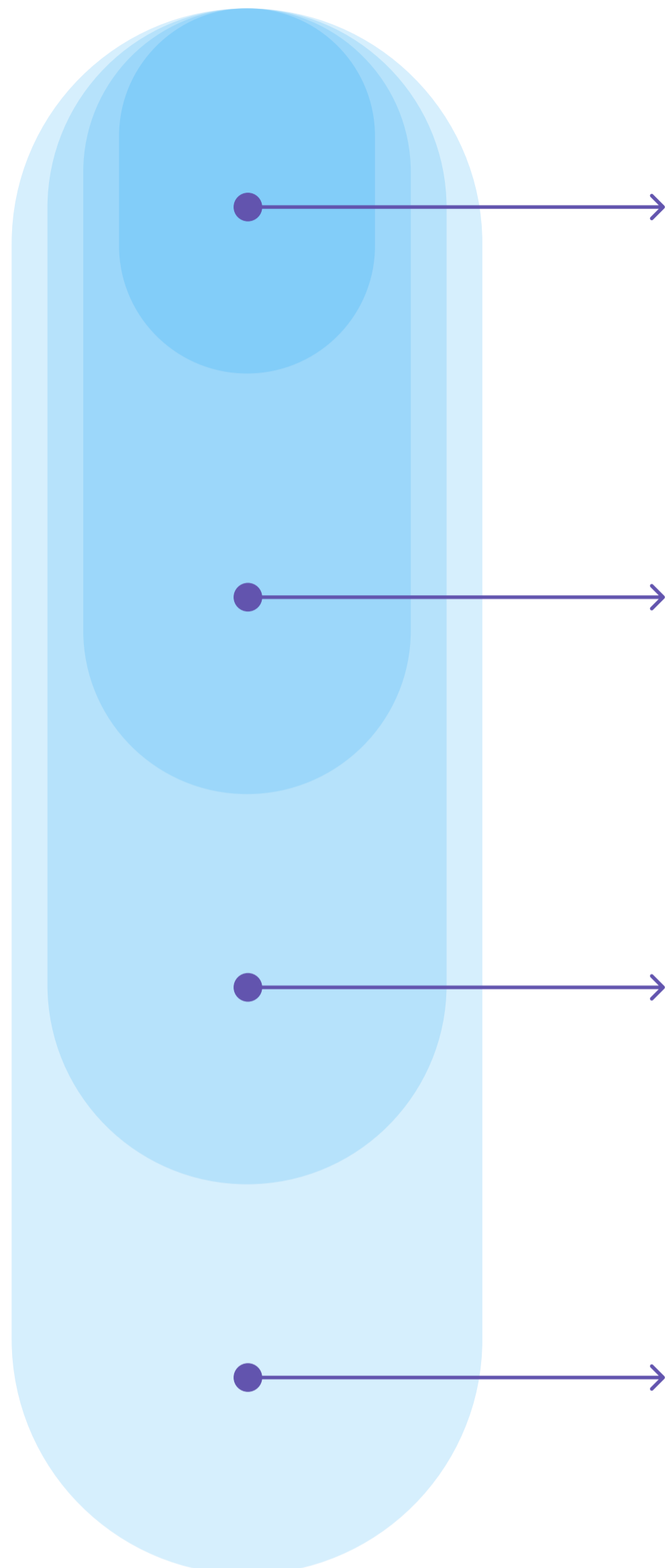
## 3 **Steer optimization with Conversion Location Value Rules** *optional*

If store and online outcomes have different value (margin, store priority, region), value rules help guide optimization toward what matters most.

[Value Rules guide](#)

[Read the complete Omnichannel Ads guide](#)

## Why Stape for CAPI-Offline



### **Affordable pricing**

Access the most competitive pricing on the market – without compromising on features. Get powerful tools, add-ons, and scalability at unbeatable value.

### **24/7 priority support**

Need help fast? Our expert team is available around the clock to solve issues, guide setups, and support your success.

### **Flexible infrastructure**

Whether you need high performance, strict compliance, or multi-client scale – Stape gives you the flexibility to build exactly what you need.

### **Free tools + integrations**

Use [Website Tracking Checker](#) to check tracking health, and [Setup Assistant](#) + [CRM/ CMS apps](#) to simplify implementation.

**Read more about the benefits of Stape hosting for server Google Tag Manager**

[Why choose Stape](#)

# Ready to get omnichannel-ready?

Create your free Stape account and start sending  
offline conversions to Meta

[Create a free Stape account](#)

