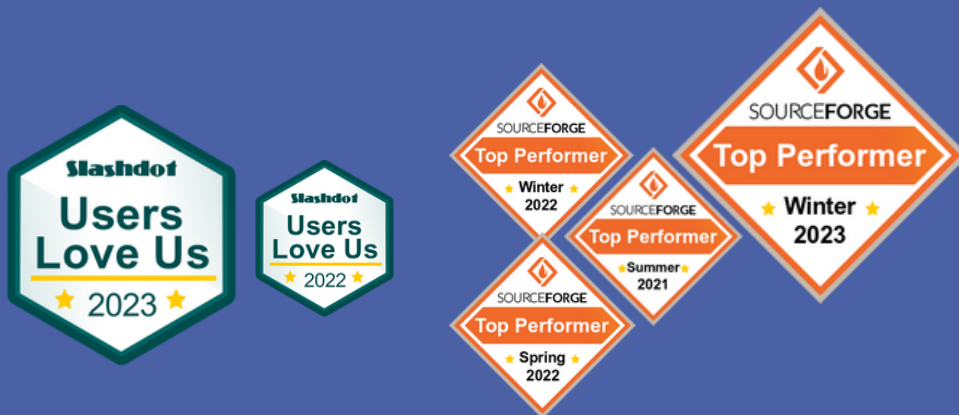


User Onboarding Checklist





Onboarding Checklist

1. Account Setup

- ☐ Tag governance: standardize tag rules
- ☐ Define tag capitalization
- ☐ Define tag word spaces
- ☐ Define required tags & exceptions
- ☐ Create your first tracking link with tour
- ☐ Connect to Google Analytics
- ☐ Create Categories
- ☐ Create your Tracking Taxonomy
- ☐ Finalize link architecture
- ☐ Document tracking and sharing process
- ☐ Define data transfer needs, let us know if custom connections are needed

2. UTM Tags

- ☐ Define UTM_Campaign architecture
- ☐ Select a UTM_Campaign generation option
- ☐ Extract UTM_Source values via CSV file
- ☐ Extract UTM_Medium values via CSV file
- ☐ Combine Medium & Source. Upload to Channels
- ☐ Extract UTM_Content & upload via CSV
- ☐ Extract UTM_Term & upload via CSV
- ☐ Test your library - check if it can be seen in your tagging dashboards

3. Custom Tags

- ☐ Create alphanumeric tags if needed
- ☐ Create numeric tags if needed
- ☐ Create hidden value tags if needed
- ☐ Create multi-value tags if needed
- ☐ Upload values to each tag if needed
- ☐ Test to see that all custom tags appear in your tagging dashboards

4. Campaign Templates

- ☐ Create a Campaign Template
- ☐ Save and check that the Template works
- ☐ Document the tagging if/then scenarios
- ☐ Create relevant campaign templates
- ☐ Review and test all campaign templates

5. Weekly Email

- ☐ Setup weekly reporting via email to receive notification about your account use

Onboarding Checklist

6. Team

- ☐ Invite your team members
- ☐ Ensure they have access to tags
- ☐ Ensure they have access to templates
- ☐ Manage their access to menus, tags and campaigns. Set permissions. Copy tags.

8. Reports

- ☐ If connected to GA, check reports page works
- ☐ Check if you can create custom reports
- ☐ Check your Ctrlly overall report works
- ☐ Check individual campaign report works

7. Shortener

- ☐ Check Ctrlly shortener is connected
- ☐ Add pixels if needed
- ☐ Add vanity domain if needed
- ☐ Check to verify tracking links are shortened and can be changed to custom alias, geo- and device targeted, and more.

9. Integrations

- ☐ Zapier
- ☐ Hootsuite
- ☐ Google Drive
- ☐ SFTP
- ☐ SFDC
- ☐ Google Analytics
- ☐ API

10. Campaign Individual Page

- ☐ Click on campaign link to get to its page
- ☐ Check you can download QR codes
- ☐ Check you can export desired CSV file
- ☐ Check you can connect to Ctrlly reports

Notes:
