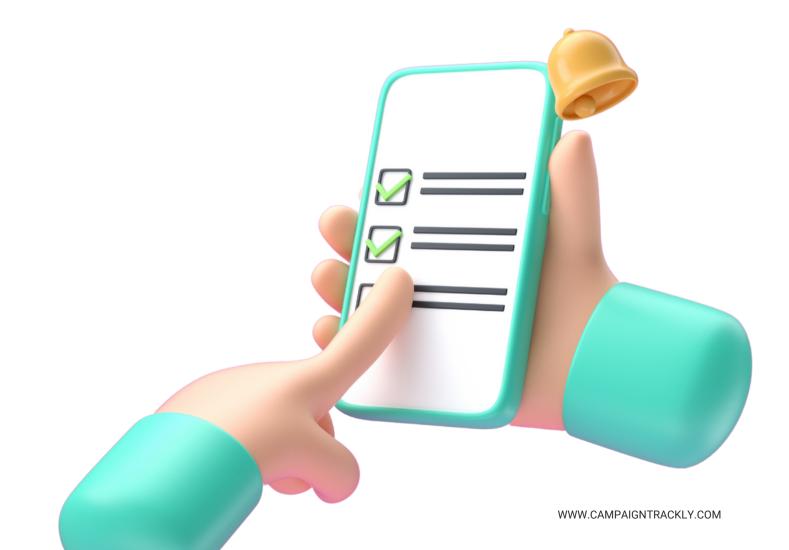
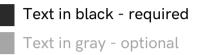


Super SIMPLE Onboarding Checklist: Build an Unbeatable UTM Process in 7 Days or Less







Day One: 30 Min-to-1 Hr Max

1. Create a UTM Link



- Create <u>Your First Link Here</u> using our demo tags
- Check you can download QR codes
 - Check you can export <u>desired CSV file</u>
 - Check you can copy-paste it

2. UTM + Custom Tags

Replace demo <u>UTM Tags</u> with yours
Create custom <u>alphanumeric</u> tags (optional)
Create custom <u>numeric tags</u> (optional)
Create custom <u>hidden value tags</u> (optional)
Create multi-value tags (optional)
Test to see that all tags appear
in your <u>UTM Link building</u> dashboard

Day Two: 30 Min-to-1 Hr Max

3. Account Setup

One-click:	<u>standardize</u>	<u>tag</u>	rules:

- Tag capitalization, spaces, required tags

Create <u>Categories</u> (optional)

Set up your <u>Campaign name in UTM link</u>

Need <u>Campaign Conventions</u>? Set it up!

Document tracking and sharing process

Define data transfer needs +let us know

if custom connections are needed

4. URL Shortener

Check <u>Ctrly shortener is connected</u>

- Add <u>pixels if needed</u>
- Add vanity <u>domain if needed</u>
 - Check to verify tracking links are shortened and can be changed to custom alias, geoand device targeted, and more.





Day Three: 30 Min-to-1 Hr Max

5. Tagging Templates

- Create a <u>Campaign Template</u>
- \exists Save and check that the Template works

6. Template Folders

Create Folders for your templates
Organize and add templates to folders

Day Four: 30 Min-to-1 Hr Max

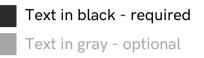
7. Reports

- One-click connect to <u>GA4 to activate</u>
 - campaign reports connection
 - Click on <u>Ctrly.io reports</u> to activate Shortener reports

8. Integrations

- Zapier
- Hootsuite
- Google Sheet
- SFTP
- API (Excel Pro & Higher Plans)
- Excel users, <u>please use this checklist</u> (Excel Pro & Higher Plans)





Day Five: 30 Min-to-1 Hr Max

9. Add us to Chrome/Edge

Chrome users, <u>add our extension here</u> Edge users, <u>add our extension here</u>

10. Add a Team

Invite your <u>team members</u> (Pro	& Higher Plans)
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- Copy tags to teams and members
- Have teams build their templates
- Manage team and member access to menus,
 - campaign creation, and tag creation

Day Six: Up to 8 Hrs

11. Fully Automated Workflows (Enterprise plans only)

	One-click integrations with SalesForce, Workfront, etc.
	Fully automate campaign name creation and send to the platform you need
	Fully automate campaign name creation and UTM link generation from the platform you need
	Fully automate tag update and UTM link generation from the platform you need
	Never login to CampgianTrackly again - operate fully from your preferred platform for full

Never login to CampaignTrackly again - operate fully from your preferred platform for full automation