



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





Onboarding Checklist: Days One & Two

■ Text in black - required
■ Text in gray - optional

Day One: 30 Min-to-1 Hr Max

1. Create a UTM Link

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

2. UTM + Custom Tags

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

Day Two: 30 Min-to-1 Hr Max

3. Account Setup

- ☐ One-click: standardize tag rules:
- ☐ - Tag capitalization, spaces, required tags
- ☐ Create Categories (optional)
- ☐ Set up your Campaign name in UTM link
- ☐ Need Campaign Conventions? Set it up!
- ☐ Document tracking and sharing process
- ☐ Define data transfer needs +let us know if custom connections are needed

4. URL 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.



Onboarding Checklist: Days Three & Four

■ Text in black - required
■ Text in gray - optional

Day Three: 30 Min-to-1 Hr Max

5. Tagging Templates

- ☐ Create a Campaign Template
- ☐ 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 GA4 to activate campaign reports connection
- ☐ Click on Ctrlly.io reports to activate Shortener reports

8. Integrations

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



Onboarding Checklist: Days Five and Six

■ Text in black - required
■ Text in gray - optional

Day Five: 30 Min-to-1 Hr Max

9. Add us to Chrome/Edge

- ☐ Chrome users, [add our extension here](#)
- ☐ Edge users, [add our extension here](#)

10. Add a Team

- ☐ Invite your [team members](#) (Pro & Higher Plans)
- ☐ 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 CampaignTrackly again - operate fully from your preferred platform for full automation