



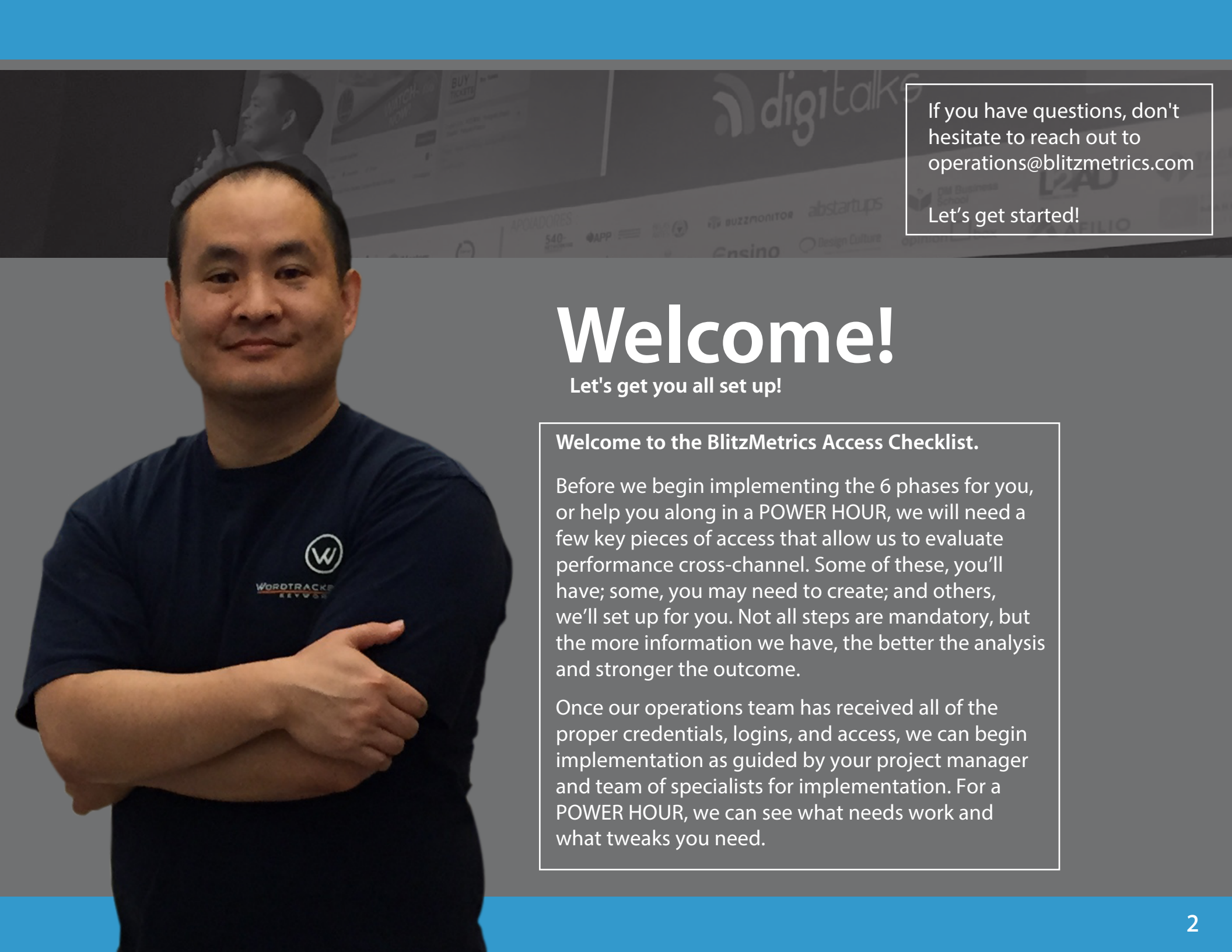
Access Checklist



blitzmetrics

Dennis Yu

Inventor of the 9 Triangles Framework



If you have questions, don't hesitate to reach out to operations@blitzmetrics.com

Let's get started!

Welcome!

Let's get you all set up!

Welcome to the BlitzMetrics Access Checklist.

Before we begin implementing the 6 phases for you, or help you along in a POWER HOUR, we will need a few key pieces of access that allow us to evaluate performance cross-channel. Some of these, you'll have; some, you may need to create; and others, we'll set up for you. Not all steps are mandatory, but the more information we have, the better the analysis and stronger the outcome.

Once our operations team has received all of the proper credentials, logins, and access, we can begin implementation as guided by your project manager and team of specialists for implementation. For a POWER HOUR, we can see what needs work and what tweaks you need.

ACL ACCESS CHECKLIST

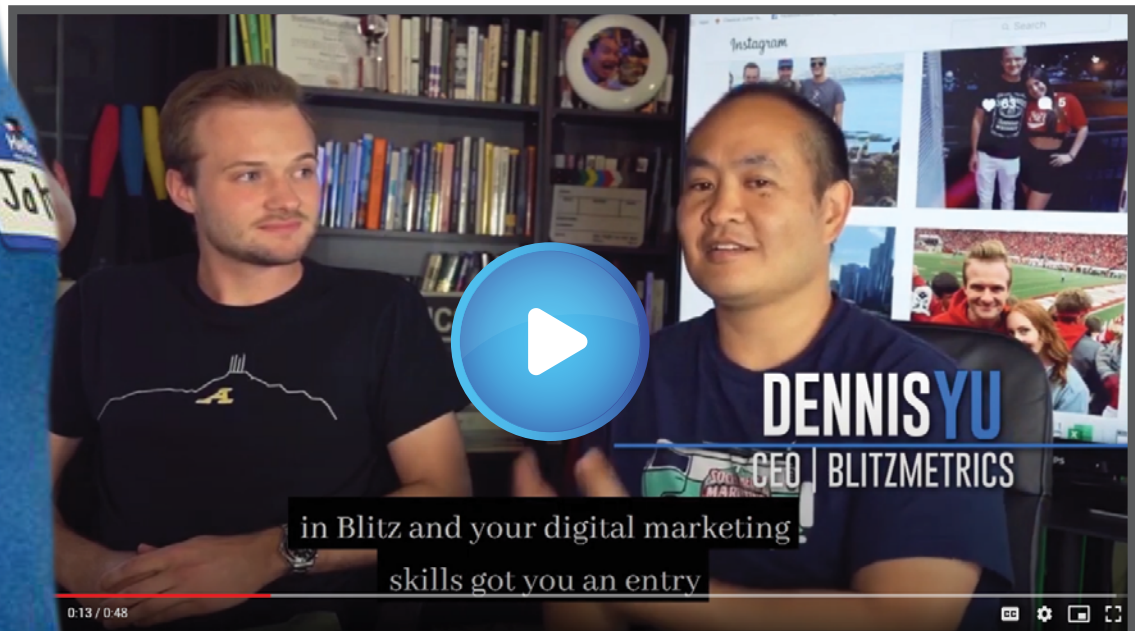


DENNIS YU

WHAT YOU'LL LEARN
















LEVERAGED DIGITAL MARKETING INTO OTHER OPPORTUNITIES



JAKE CAMPOLI
Ad Specialist
BlitzMetrics



ONE PAGER CHECKLIST

- | | | | | | |
|--------------------------|---|---------------------------|--------------------------|---|--------------------------------|
| <input type="checkbox"/> |  | Facebook page | <input type="checkbox"/> |  | Instagram (optional) |
| <input type="checkbox"/> |  | Facebook Ad account | <input type="checkbox"/> |  | Twitter Ad account (optional) |
| <input type="checkbox"/> |  | Facebook Business Manager | <input type="checkbox"/> |  | Quora Ad account (optional) |
| <input type="checkbox"/> |  | Google Analytics | <input type="checkbox"/> |  | LinkedIn Ad account (optional) |
| <input type="checkbox"/> |  | Google Ads | <input type="checkbox"/> |  | Snapchat Ad account (optional) |
| <input type="checkbox"/> |  | Website Access | <input type="checkbox"/> |  | TikTok Ad account (optional) |
| <input type="checkbox"/> |  | ClickFunnels (optional) | | | |



GRANT ACCESS TO FACEBOOK PAGE

Steps 1-4 take ~3 minutes



- ❑ 1. Log in to business.facebook.com (activate your [Business Manager](#) if needed).
- ❑ 2. Click on the **Business Settings** tab and select **Pages**.
- ❑ 3. Click on the **Assign Partner** button.
- ❑ 4. Click on **Connect your Page using your partner's business ID instead**.
- ❑ 5. Assign a role based on what you would like us to do for you. Enter BlitzMetrics business ID **830181950327977**.
- ❑ 6. Click **Connect**.



Note:
Repeat these steps if you have multiple pages.

1

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4

5

6



GRANT ACCESS TO FACEBOOK AD ACCOUNT

STEPS 1-6 TAKE ~5 MINUTES

- ❑ 1. Log in to business.facebook.com (activate your **Business Manager** if needed).
- ❑ 2. Click on the **Business Settings** tab and select **Ad Account**.
- ❑ 3. Click on the **Assign Partner** button.
- ❑ 4. Click on **Connect your Page** using your partner's business ID instead.
- ❑ 5. Select **Advertiser** when assigning our role. Enter BlitzMetrics business ID **830181950327977**.
- ❑ 6. Click **Connect**.

1

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Facebook has begun disabling ad accounts which run ads for multiple different advertisers on a single ad account which is in violation of its advertising policies. All advertisers who have ad accounts running ads for multiple advertisers are required to create new ad accounts for each advertiser that is being promoted.

Make sure each client has their own Facebook Ad account as part of our setup.

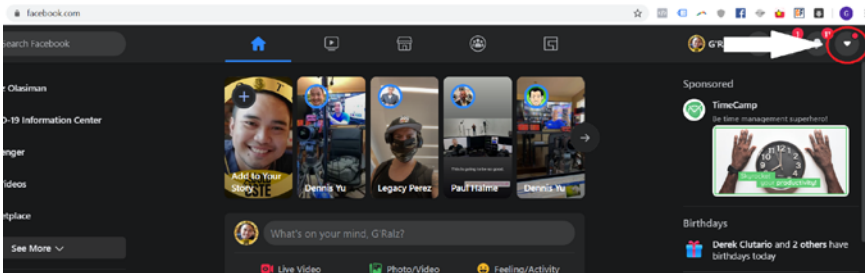


ACTIVATE TWO-FACTOR AUTHENTICATION ON FACEBOOK

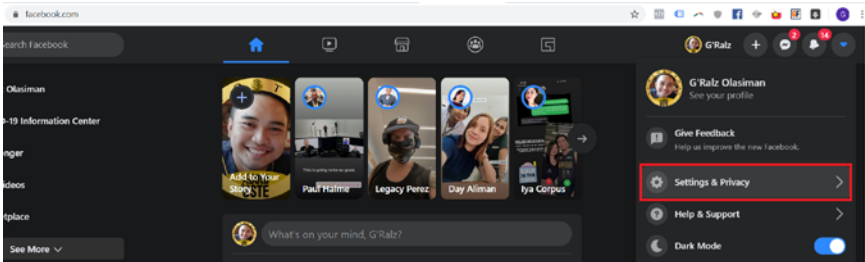
Starting May 18, 2020, Facebook requires the use of two-factor authentication to access Business Manager.

1. Log in to facebook.com

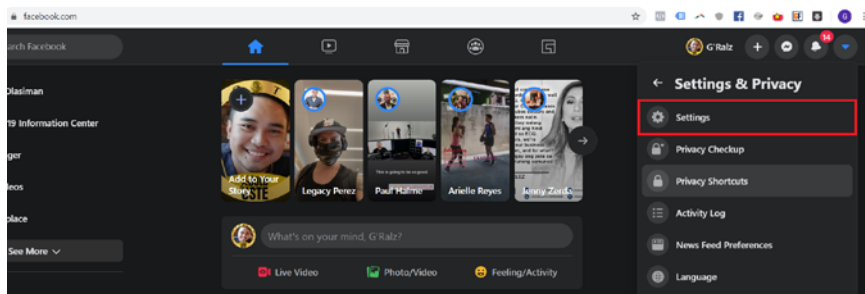
2. Click onto the downward pointing triangle in the far right-hand corner.



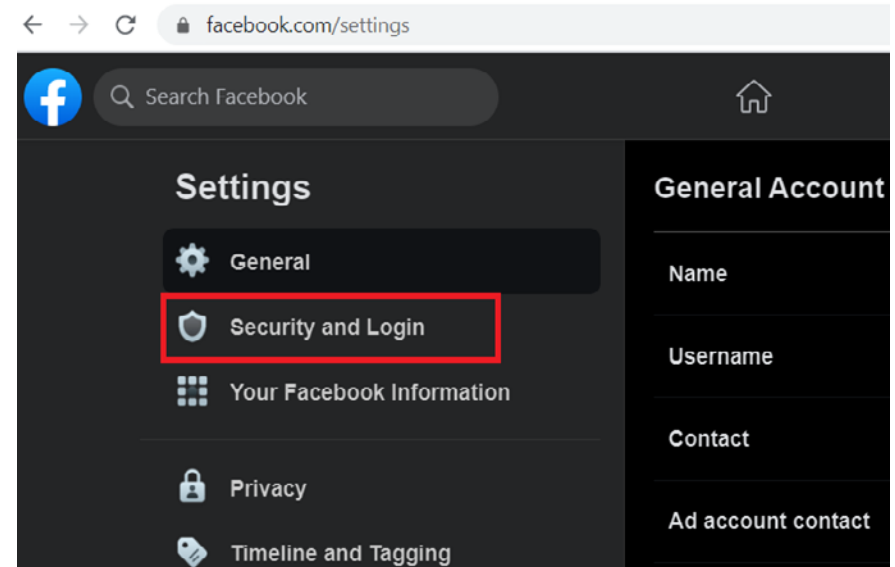
3. Click "Settings and Privacy".



4. Click "Settings"

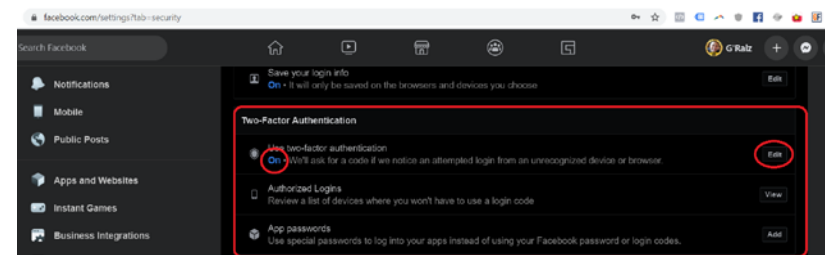


5. Click "Security and Login".



6. Scroll down to "Two-Factor Authentication" Section.

- If you see that Two-Factor Authentication is turned on for your account, you're good to go.
- If you see that Two-Factor Authentication is turned off for your account, click "Edit".





ACTIVATE TWO-FACTOR AUTHENTICATION ON FACEBOOK

Starting May 18, 2020, Facebook requires the use of two-factor authentication to access Business Manager.

7. Choose Authentication Option of choice.

Two-Factor Authentication > **Two-Factor Authentication**



Help Protect Your Account

If we notice an attempted login from a device or browser we don't recognize, we'll ask for your password and a verification code.

Select a Security Method



Authentication App

Recommended - Use an app like Google Authenticator or Duo Mobile to generate verification codes for more protection.

[Use Authentication App](#)



Text Message (SMS)

Use text message (SMS) to receive verification codes. For your protection, phone numbers used for two-factor authentication can't be used to reset your password when two-factor is on.

[Use Text Message \(SMS\)](#)

FACEBOOK BUSINESS SET-UP

Create Your Business Manager Account.

1. Go to business.facebook.com/overview.
2. Click **Create Account**.
3. Enter a name for your business, your name and work email address and click **Next**.
4. Enter your business details and click **Submit**.

Create Your Facebook Ad Account.

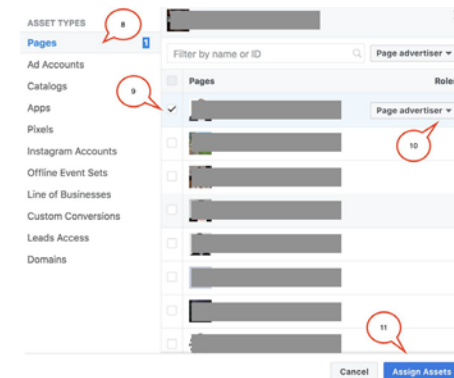
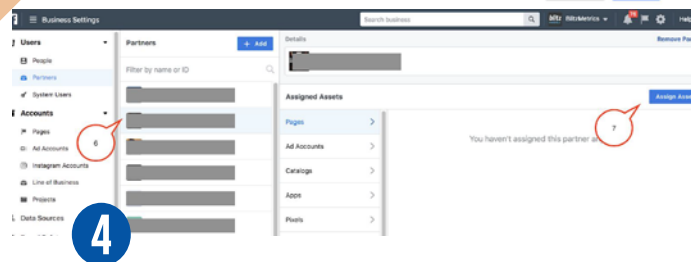
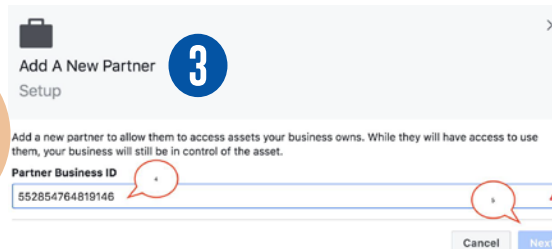
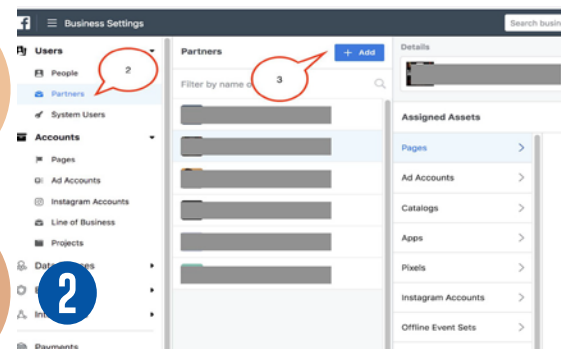
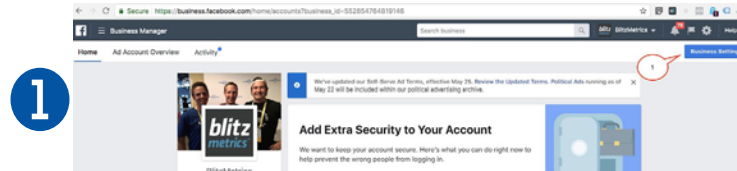
Once you set up your Facebook Business Manager, it will automatically create your AD account. Steps on personalizing the account:

1. Go to your Business Manager.
2. Click on "Ad Accounts" under "Accounts".
3. Fill in all the blanks by entering your company's name, address, and other relevant information.

HOW TO GRANT ACCESS TO FACEBOOK ASSETS USING BUSINESS MANAGER

CHECKLIST

- 1. Log in to business.facebook.com.
- 2. Click on the **Business Settings** tab.
- 3. Under "User category", select **Partners** and click the **Add** button.
- 4. Enter BlitzMetrics business ID **552854764819146** and click **Next**.
- 5. Once BlitzMetrics is added to your list of partners, you can start assigning Assets (Pages, Ad Accounts, Apps, Pixels, etc.).
- 6. Select **BlitzMetrics** from your list of Partners and click on **Assign Assets**.
- 7. Select the Pages and Ad Accounts you want us to have access to, select the appropriate Role, and click on **Assign Assets**.



5

HOW TO GRANT INSTAGRAM ACCESS

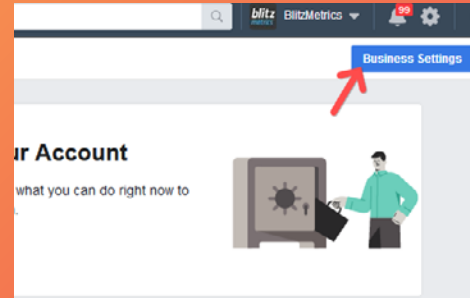


- 1) Log in to [FB Business Manager](#).
- 2) Click on Business Settings.
- 3) On the left pane of Business Settings, under Accounts, select Instagram Accounts.
- 4) Click the Add button. Enter the username and password for your Instagram account.
- 5) Select the IG account, then click on Assign Partners.
- 6) Enter BlitzMetrics Business ID 830181950327977 and click Next.

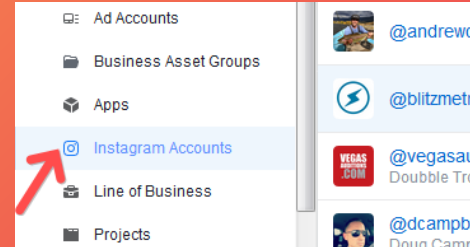


Liked by **dennis.yu** and **98 others**

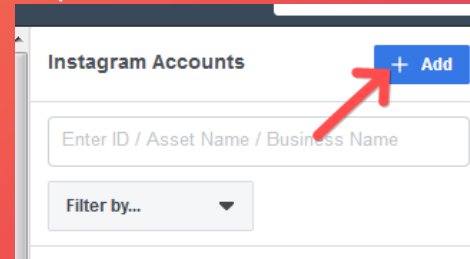
Step 2



Step 3



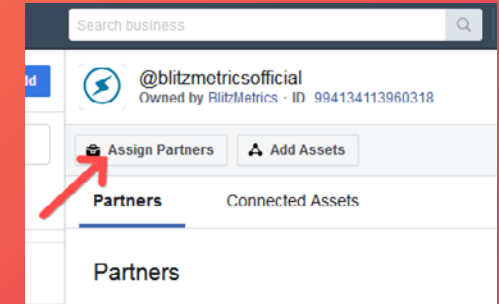
Step 4.1



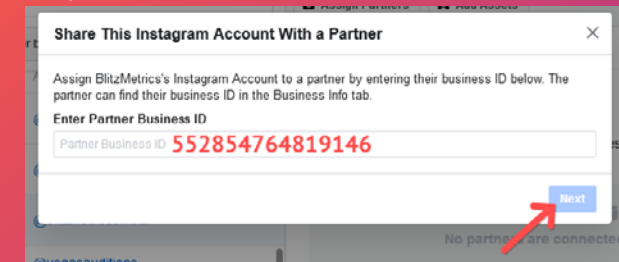
Step 4.2



Step 5



Step 6



GOOGLE TAG MANAGER SET-UP

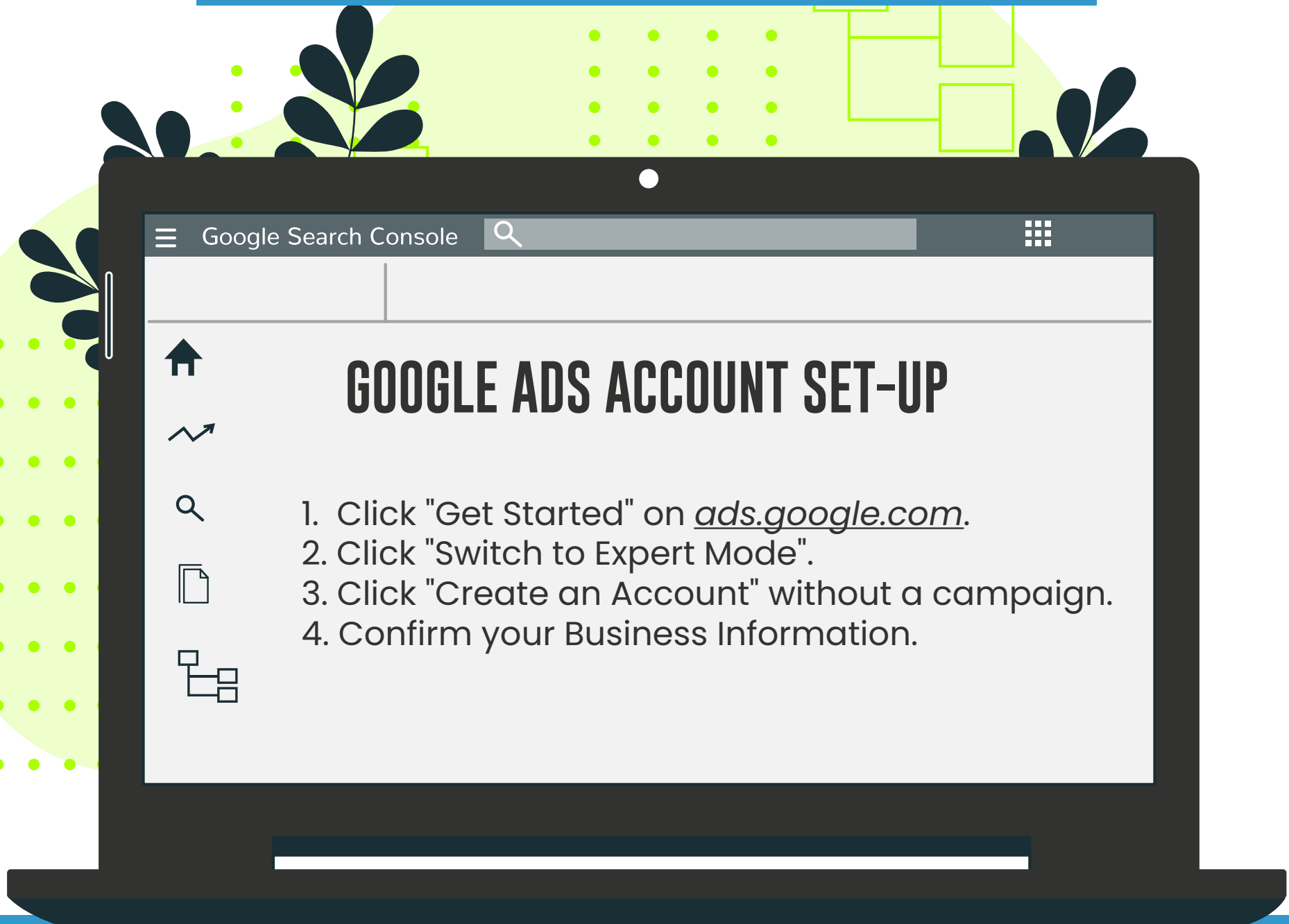
1. Create an account at tagmanager.google.com
2. Set up a container.
 - Give your container a descriptive name.
 - Type of content it'll be associated with (Web).
3. Click "Create".
4. Review Terms of Service and Click "Agree".

GOOGLE ANALYTICS ACCOUNT SET-UP

1. Click "Sign Up" on <https://analytics.google.com/analytics>.
2. **Enter your account and website name, as well as the website's URL.**
 - Website's industry category
 - Time zone you want the reporting to be in.
3. Once you do all that, accept the Terms and Services in order to get your **tracking ID**.

The tracking ID is a string of numbers that tells Google Analytics to send analytics data to you. It's a number that looks like UA-000000-1. The first set of numbers (000000) is your personal account number and the second set (1) is the property number associated with your account.

GOOGLE TAG MANAGER SET-UP





GOOGLE TAG MANAGER

1. Log in to <https://tagmanager.google.com/>.
2. Click **Admin**.
3. In the **Account** column, select **User Management**.
4. Click the (+) Icon.
5. Select **Add new users**.
6. Enter access@blitzmetrics.com.
7. Set **Account Permissions**. Select **Administrator** so we can create new containers for Google Ads and Facebook pixel.



The Google logo is displayed in its characteristic multi-colored font.The Analytics logo features a stylized bar chart icon followed by the word "Analytics".

Link to Google Ads Today

Bring your Ads and Analytics accounts together to make more informed business decisions. Once your accounts are linked, you can import user insights into your Ads account, then tie the insights back to the keywords or ads that brought users to your site. From understanding how visitors engage with your content, to identifying what factors influence conversion rates, Ads and Analytics work better together.

[LINK GOOGLE ADS](#)

Follow [these instructions](#) to link your Ads and Analytics accounts.

See you online,
The Google Analytics Team

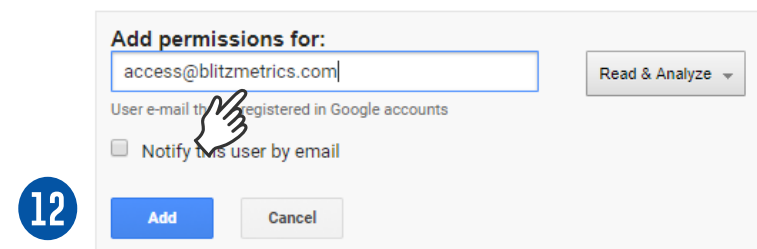
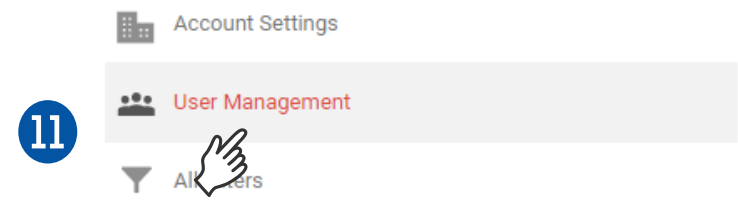
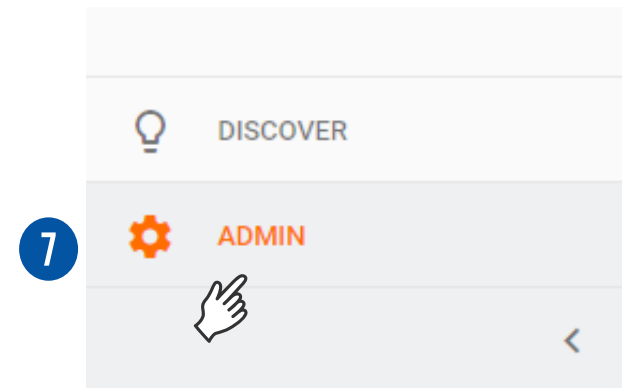
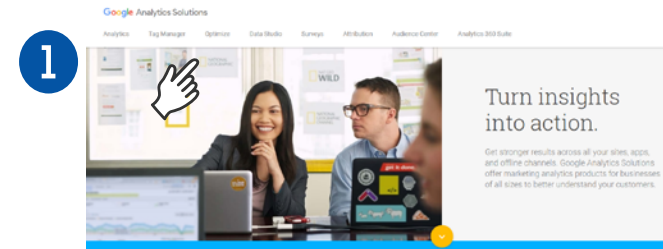
The word "ADS" is written in large, white, sans-serif capital letters on a blue rectangular background.

GRANT ACCESS TO GOOGLE ANALYTICS

STEPS 1-6 TAKE ~5 MINUTES



- ❑ 1. Log in to www.google.com/analytics.
- ❑ 2. If you already have your account set up, go to Step 6.
- ❑ 3. If you do not have an account set up, create one by clicking **Start for free**.
- ❑ 4. Complete the Start for free form and accept the terms (leave boxes checked).
- ❑ 5. Go to Step 10.
- ❑ 6. If you see your website listed on the Home tab, go to Step 10.
- ❑ 7. If you don't see your website, click **Admin** (in top nav bar).
- ❑ 8. Click on the **Account** dropdown arrow and select **Create new account**.
- ❑ 9. Complete the signup form and accept the terms (leave boxes checked).
- ❑ 10. Click **Admin** (in left nav bar).
- ❑ 11. Click on **User Management** under Account nav bar.
- ❑ 12. Add access@blitzmetrics.com as a user with **Manage > Edit permissions**.



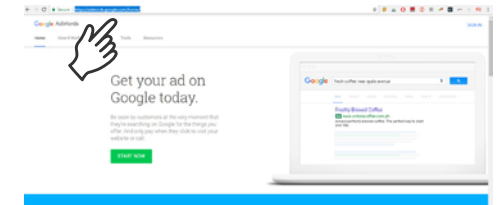
GRANT GOOGLE ADS

STEPS 1-8 TAKE ~5 MINUTES

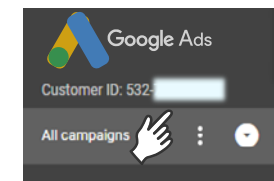


- 1. Log in to <https://ads.google.com>.
- 2. Copy and email your account number to access@blitzmetrics.com.
- 3. You will receive an email request to **add BlitzMetrics as a client manager**.
- 4. Go to Google Ads and click on the **gear icon** in the upper-right corner of your account.
- 5. Select **Account Settings** from the dropdown menu.
- 6. Click **Account Access** in left-hand nav bar.
- 7. Under Client Manager, click on the button that says **Accept Request**.
- 8. Click **OK**.

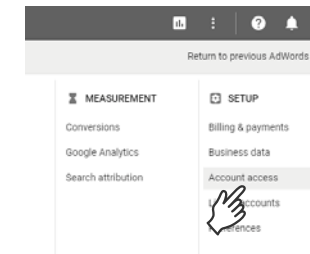
1



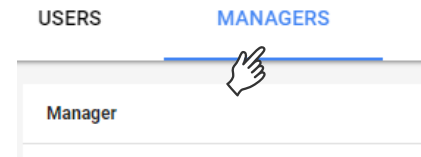
2



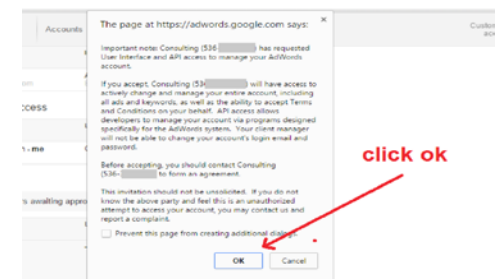
6



7



8



Website Access



1. Log in to your Administrator Account.
2. Go to "Users" Section.
 - Add New.
3. Add access@blitzmetrics.com as an Editor.
 - Input "BlitzMetrics Team" as name for your convenience.
 - Input temporary password.
 - Tick the box "Send this password to the new user by email".
 - Select "Editor" role.

IF other platforms:

Contact operations@blitzmetrics.com for specific instructions.

ADVANCED PLUMBING

*Not included in the EXPRESS package for local service businesses.

blitzmetrics



CLICKFUNNELS ACCESS

1. Click membership funnel you want BlitzMetrics to have access to.
2. Click "Membership Area".
3. Copy the **Secret Sign Up URL** and paste in an Incognito window.
4. Create a login and password for BlitzMetrics through access@blitzmetrics.com.

For membership funnels with **Restricted Access**:

After steps 1 to 4:

5. Go to "Membership Area".
6. Click "Members".
7. Click "Edit" on the login you created from BlitzMetrics.
8. Click "Purchase".
9. Add "Purchase or Product Access" to assets you want BlitzMetrics to have access to.
10. Click "Save".

ClickFunnels Tutorial: Manually Add New Members:

<https://help.clickfunnels.com/hc/en-us/articles/360006738753-Manually-Add-New-Members>

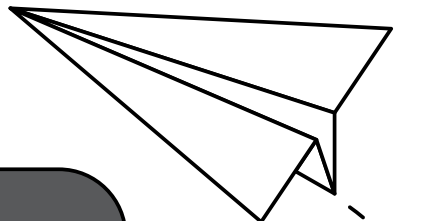
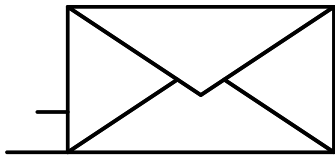
TWITTER ADS ACCOUNT SET-UP

1. Go to [Twitter.com](https://twitter.com).
2. Log in to the account that you want to promote Tweets from. This is the handle that your Twitter Ads account will be created for.
3. Once logged in, go to ads.twitter.com.
4. You'll be able to choose between two promotion options:
 - **I want to automatically promote my Tweets.** This option will lead you to sign up for [*Twitter Promote Mode*](#), our automatic promotion program.
 - **I want to launch a Twitter Ads campaign.** This option will lead you to set up and manage our [*objective-based campaigns*](#).
5. Select your country and time zone. Select the country whose currency you'd like to be billed in, and the time zone you'd like your campaign results to show up in. You cannot change these values once you've created your account.
6. You'll be brought to the campaign setup form or Twitter Promote Mode setup, depending on your choice at step 4.
7. Enter your [*billing information*](#) to complete your ads account.
8. Once ad campaign is completed, you can choose to pause the campaign.

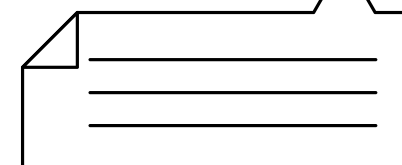
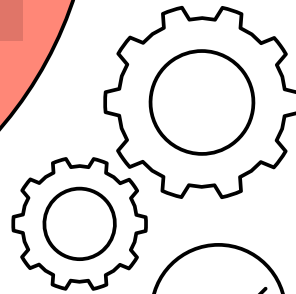
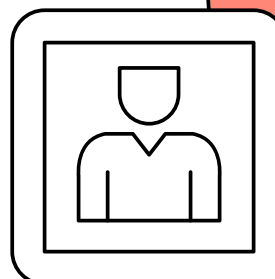
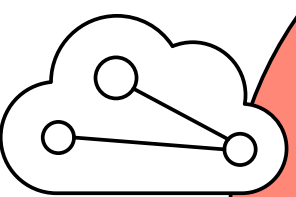
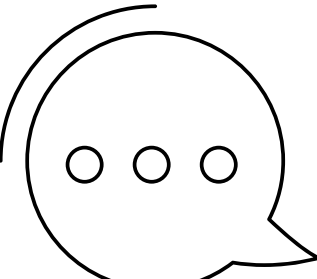


HOW TO GRANT TWITTER AD ACCOUNT ACCESS

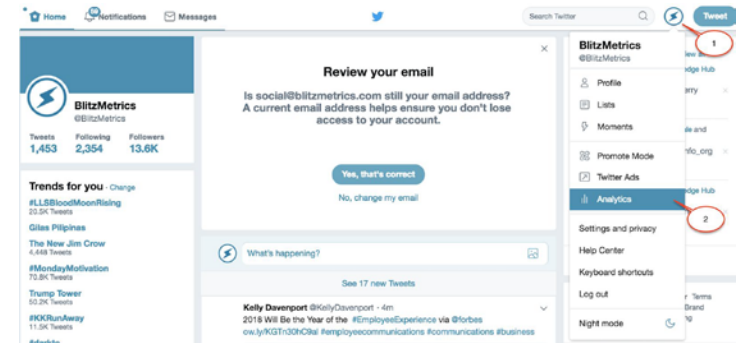
(OPTIONAL)



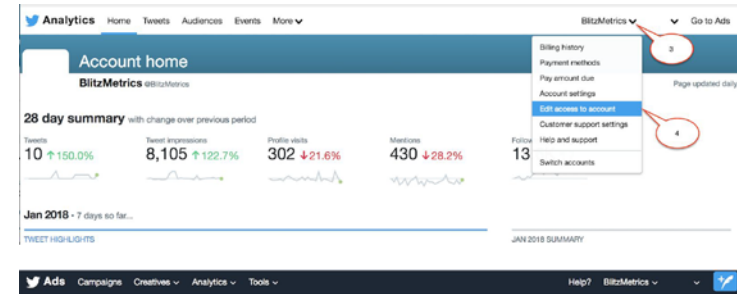
1. Go to Profile and Settings
2. Click Analytics
3. Click on your Account Name
4. Click Edit access to account
5. Click on Add Access
6. Type in "@BlitzMetrics"
7. Select Ads Manager
8. Save changes



2



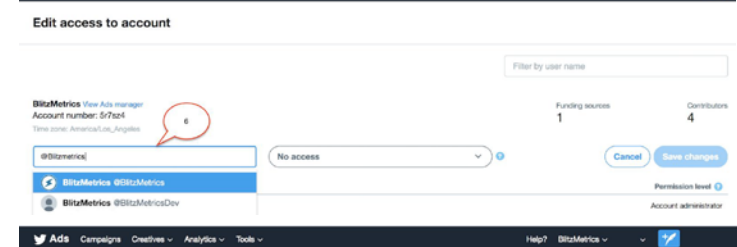
4



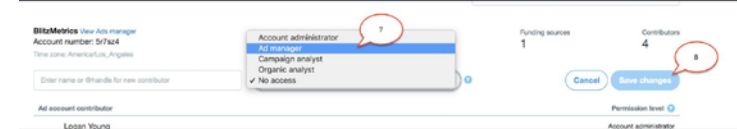
5



6



8



LinkedIn

ADS ACCOUNT SET-UP

1. Sign in to your personal LinkedIn.com account.
2. Click **Work** at the top of your homepage and select **Advertise**.
3. Add an account name, select the billing currency, and associate a LinkedIn Page on the welcome screen.
4. Click **Create Account**.

LINK INSTAGRAM ACCOUNT TO FACEBOOK ACCOUNT

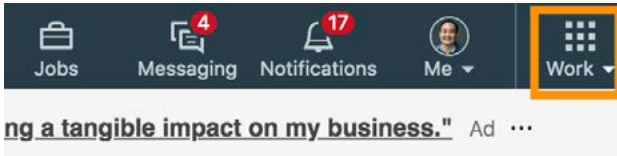
1. Go to your profile and tap the gear icon.
2. Tap Settings.
3. Tap Account, then tap Linked Accounts.
4. Tap Facebook and enter your Facebook login info.

Once you link accounts, you'll have the option to share a post to Facebook from the same screen where you add a caption. You can also share from Instagram to a Facebook Page you manage.

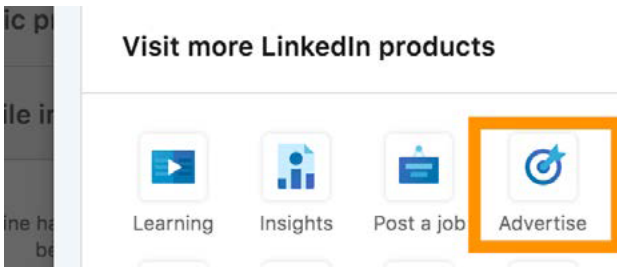
LinkedIn GRANT ACCESS TO LINKEDIN AD ACCOUNT

If you don't have a LinkedIn Ad Account or Business Page here's how to set it up:

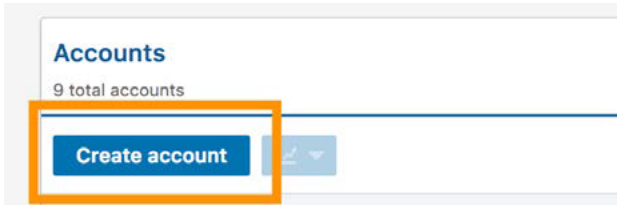
1. Access your [LinkedIn Profile](#).
2. Click the 9 boxes icon.



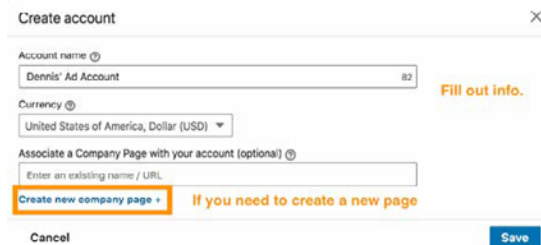
3. Click Advertise



4. Click "Create Account"

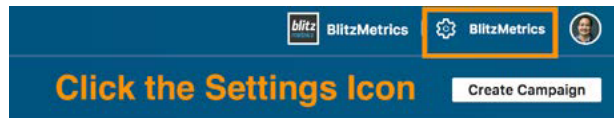


5. Fill out info and if needed create a new Company Page.

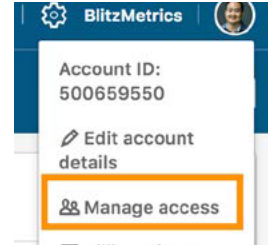


Once you have created a LinkedIn Ad Account and Company page, you can give us access using the instructions below.

1. Login to your [LinkedIn Campaign Manager](#)
2. Click your Ad Account.
3. Click the settings icon.



4. Click "Manage access"



6. Click "Add user to account"

User Permissions

Add user to account +

7. Copy and paste "<https://www.linkedin.com/in/dennisyu/>" into the form.

User Permissions



8. Select "Account Manager"

✓ Account manager
Campaign manager
Creative manager
Viewer



Quora

ADS ACCOUNT SET-UP



1. Login to Quora.
2. Locate and click your profile icon at the top right of the home page.
3. Click “Create Ad” from the dropdown menu.
4. Enter the business information you would like to use to advertise.



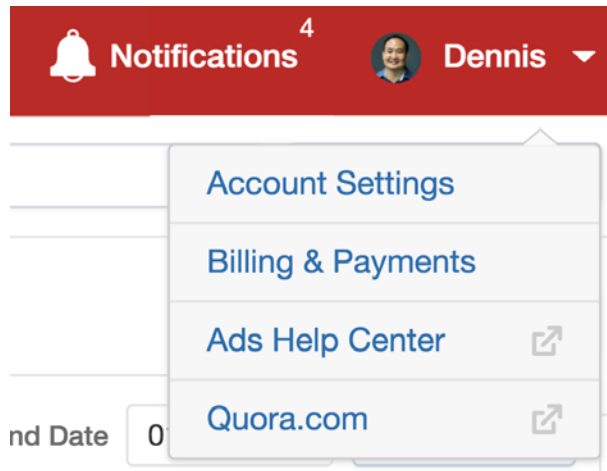


GRANT ACCESS TO QUORA AD ACCOUNT

(OPTIONAL)

1 Access ads manager by signing in to www.quora.com and then accessing www.quora.com/ads

2 While logged into ads manager, click on your profile icon in the upper right corner.



3 Select **Account Settings** and click 'Add a New User'.

User Accounts

Users



Dennis Yu
Admin

+ Add a New User

4 Copy and paste "<https://www.quora.com/profile/Dennis-Yu>" in the blank fill box and click **Add New User**.

Add a New User

Users added to your ad account will have full privileges to create and edit ad campaigns, update billing preferences, and generate reports.

<https://www.quora.com/profile/Dennis-Yu>

Dennis Yu

Teacher, servant, math...





Snapchat

ADS ACCOUNT SET-UP

1. Log in to Ads Manager.
2. Click the menu in the top corner and select 'Ad Accounts.'
3. Click '+ **New Ad Account**.'
4. Click 'Account Details' and fill out your ad account info.
5. Click 'Create Account.'

At this point your ad account will be created and you can find it in the 'Ad Accounts' portion of Ads Manager.

- To begin launching ads, you'll want to input a payment method. You can also add members to your ad account.





TIKTOK ADS ACCOUNT SET-UP:

1. Register your account at <https://ads.tiktok.com/i18n/signup/>
2. Choose either "Individual" or "Business" account.
3. Fill in the details:
 - email or phone number
 - create a password
 - get verification code
4. Click "Sign Up".
5. Fill in account details.
6. Click "Register".

Reference:

<https://ads.tiktok.com/help/article?aid=6681431650871541766>

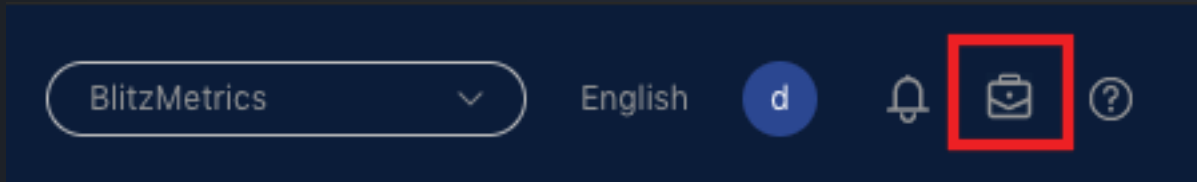


GRANT ACCESS TO

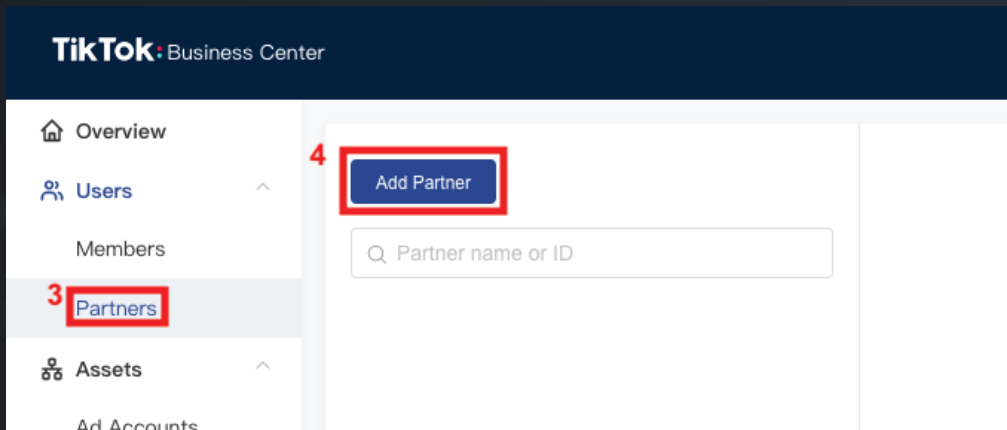


AD ACCOUNT

1. Login to ad account at <https://www.tiktok.com/business/en/>.
2. Click on the Business Center Icon in the upper right-hand corner and create your business center by choosing a name and time zone.



3. In your Business Center, click on Partners underneath the Users menu.
4. Click on Add Partner



5. Invite BlitzMetrics as a Partner by pasting our Partner ID in the provided box. BlitzMetrics Partner ID: 6865714020603658245
6. Assign admin permissions to our Business Center so that we can assign team members to work on your account and control their roles and levels of permission.

blitzmetrics



**COMPLETED ACCESS
CHECKLIST SAMPLE**

Ben Po, DDS

FREQUENTLY ASKED QUESTIONS

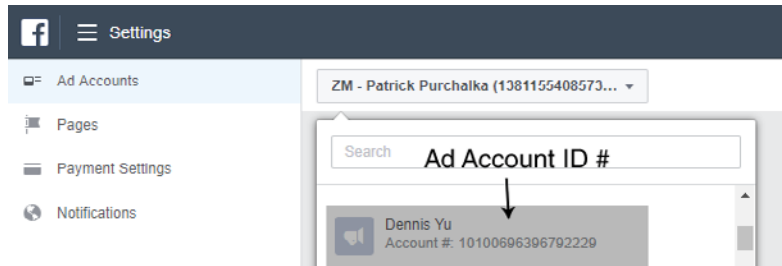


Q: Why don't I see any "Assign Partner" button when I'm trying to grant access for either my Facebook Page or Ad Account?

A: Depending on the way your Business Manager was set up, you may not see an "Assign Partner" button. If this option isn't available, here is what to do:

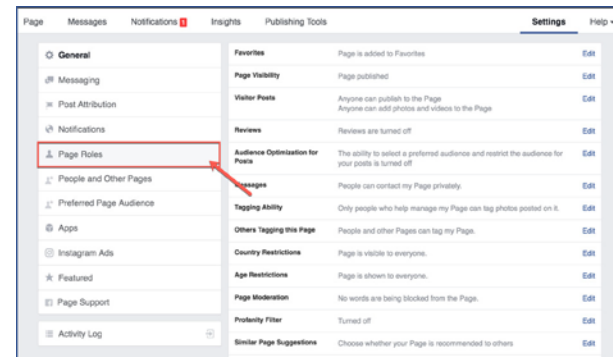
For a Facebook Page: Email the URL of your page to operations@blitzmetrics.com using the subject line "FB Page Access". We will then manually request access and email you the next steps when completed.

For a Facebook Ad Account: Email your Ad Account ID to operations@blitzmetrics.com using the subject line "FB Ad Account Access". We will then manually request access and email you the next steps when completed.



Q: Why can't I find where to approve access that was requested?

A: For a Facebook Page: Go to your Facebook Page, click on **Settings**, and then navigate to **Page Roles**. Here, you can confirm access.



For a Facebook Ad Account: Check the notifications on your Facebook Business Manager, your Ad Account, your email, and the profile associated with the Ad Account or Business Manager. Depending on how your Business Manager was set up, and your role, the notification to approve access should show up in one of these four places.

blitzmetrics

If you have questions, don't
hesitate to reach out to
operations@blitzmetrics.com

