ADMIN Onboarding Checklist: Adobe Analytics

Onboarding Checklist

1. Account Setup

- [ ] Tag governance: <u>standardize tag rules</u>
- [ ] Define tag capitalization
- [ ] Define tag word spaces
- [ ] Define required tags & exceptions
- [ ] Create <u>Categories</u>
- [ ] Create your <u>Tracking Taxonomy</u>
- [ ] Document link architecture
- [ ] Document tracking and sharing process
- [ ] Define data transfer needs +let us know if custom connections are needed

2. Custom Tags

- [ ] Create <u>alphanumeric</u> tags if needed
- [ ] Create <u>numeric tags</u> if needed
- [ ] Create <u>hidden value tags</u> if needed
- [ ] Create multi-value tags if needed
- [ ] Upload values to each tag
- [ ] Test to see that all custom tags appear in your tagging dashboards

3. Campaign Templates

- [ ] Create a <u>Campaign Template</u>
- [ ] Save and check that the Template works
- [ ] Document the tagging if/then scenarios
- [ ] Create templates variations for every if/then
- [ ] Review and <u>test all campaign templates</u>

4. Template Folders

- [ ] Create Folders for your templates
- [ ] Organize and nest your folders appropriately
- [ ] Add templates to relevant folders
- [ ] Edit templates to rename appropriately if needed

5. Weekly Email

- [ ] Setup <u>weekly reporting</u> via email to receive notification about your account use

6. Team

- ☐ Invite your team members
- ☐ Copy tags to teams and members
- ☐ Have teams build their relevant templates
- ☐ Manage team and member access to menus, campaign creation, and tag creation

7. Shortener

- ☐ Check Ctrly 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.

8. Reports

- ☐ If you need Adobe Analytics Campaign Integration, we will have to work with your Adobe admin to set it up
- ☐ If you use GA Analytics - we can connect that automatically for you.
- ☐ If you use our shortener, Ctrly.io, check your Ctrly overall report here

9. Integrations

- ☐ Zapier
- ☐ Hootsuite
- ☐ Google Drive
- ☐ SFTP
- ☐ SFDC
- ☐ Click & Add
- ☐ 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 Ctrly reports

Notes:

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