



Access Checklist




chirorevenue

Tristan Parmley *CEO of Chirorevenue*



Hi, my name is Tristan. I'm a teacher, which means I'm equally a student. I've always loved learning, I even liked school. I've never met a stranger. In fact, I've always wanted to speak in front of thousands or be the cause of someone's laugh. I've ALWAYS been the class clown... But I don't think that's a negative thing.

When I came to college I was completely broke and alone. I aspired to be an athlete and this was the only Division 1 program that would even let me walk-on, I aspired to be a Physical Therapist because of their lax work hours so I could live like my grandpa, and I aspired to never see my hometown again.

When I got to college I met my random roommate, now business partner Josh, who opened my eyes to the world of business, personal development, and influencing others.

So, I've learned that knowledge is not power. In fact, knowledge is useless. Applying knowledge is power, and helping & teaching others to be better is power, influencing positive change is power. We started a business that has NOTHING to do with my degree, which we now run full time.

Since then we've spent nearly \$100,000 on elite courses, masterminds, and events to meet the top influencers in every industry and learn directly from them, their material, and their teams.

I'm only 23, nothing is certain... but I can tell you that looking at where I've been vs where I am proves that nothing stops this universe's purposeful plan.

Tristan Parmley
CEO of Chirorevenue

ACL ACCESS CHECKLIST

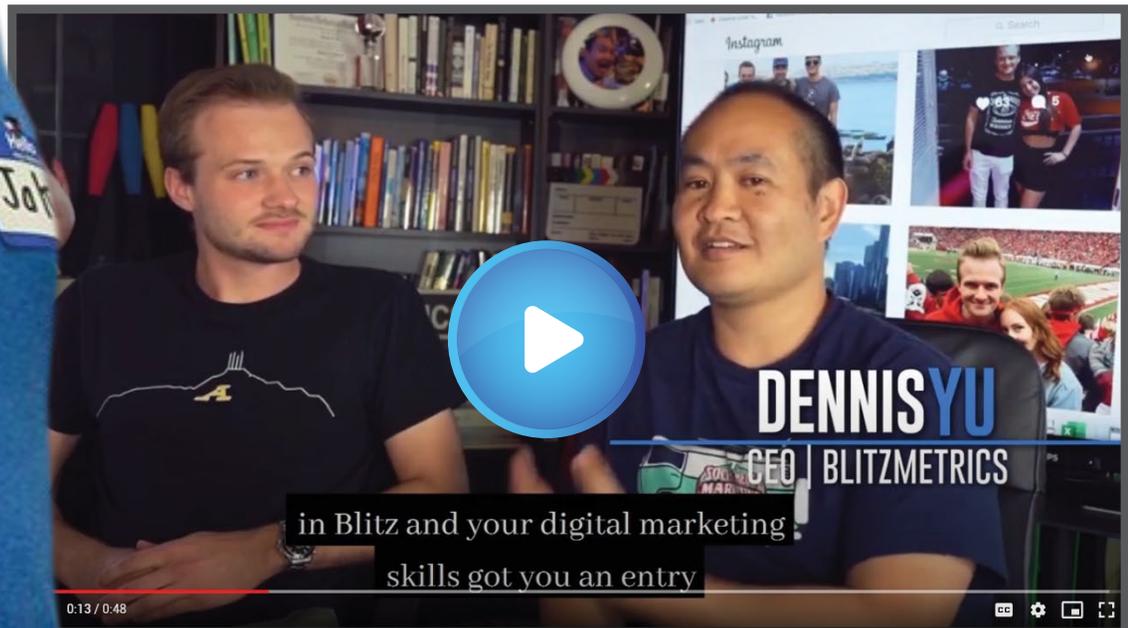


DENNIS YU

WHAT YOU'LL LEARN



LEVERAGED DIGITAL MARKETING INTO OTHER OPPORTUNITIES



JAKE CAMPOLI
Ad Specialist
Chirorevenue



ONE PAGER CHECKLIST

-  Facebook page
-  Facebook Ad account
-  Facebook Business Manager
-  Google Analytics
-  Google Ads
-  Website Access
-  ClickFunnels (optional)
-  Instagram (optional)
-  Twitter Ad account (optional)
-  Quora Ad account (optional)
-  LinkedIn Ad account (optional)
-  Snapchat Ad account (optional)
-  Tiktok Ad account (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 Chirorevenue business ID: **1830965433827492**
- ❑ 6. Click **Connect**.

Note:
Repeat these steps if you have multiple pages.

1 Business Manager dashboard

2 Business Settings menu

3 Assign Partner button

4 Connect partner to Page dialog

5 Enter business ID dialog

6 Connect button



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 Chirorevenue business ID: 1830965433827492
- ❑ 6. Click **Connect**.

1. Business Manager dashboard

2. Business Settings > Ad Accounts

3. Assign Partner button

4. Connect partner to Page dialog box

5. Connect button

6. Connect button

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.

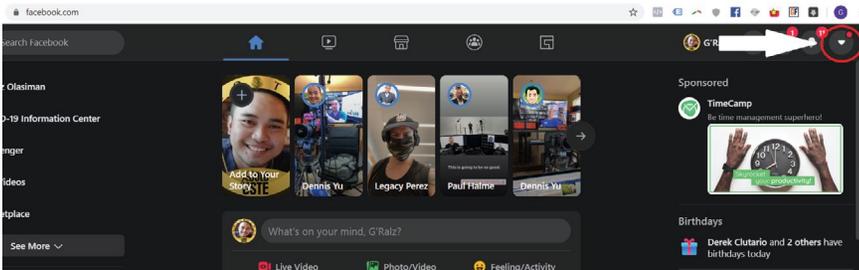


ACTIVATE TWO-FACTOR AUTHENTICATION ON FACEBOOK

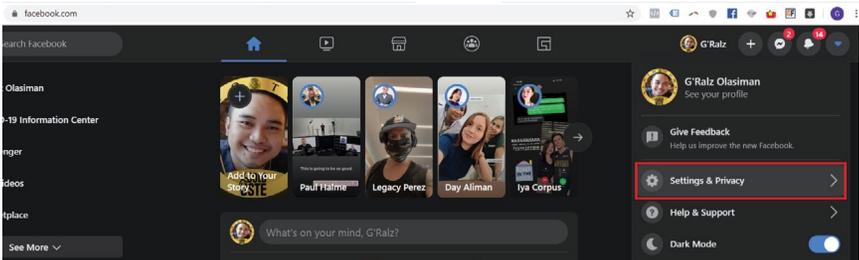
Starting May 18, 2020, Facebook requires the use of two-factor authentication to access Business Manager.

1. Log in to facebook.com

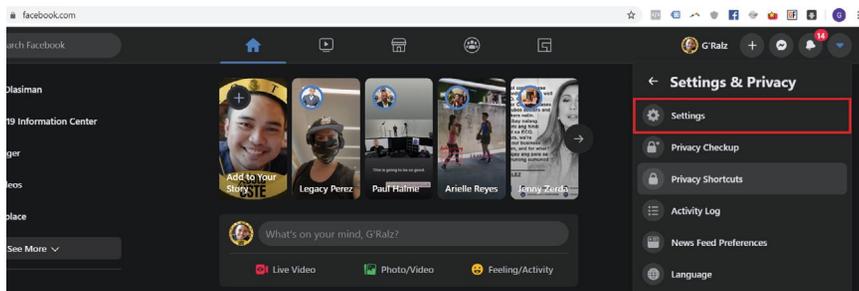
2. Click onto the downward pointing triangle in the far right-hand corner.



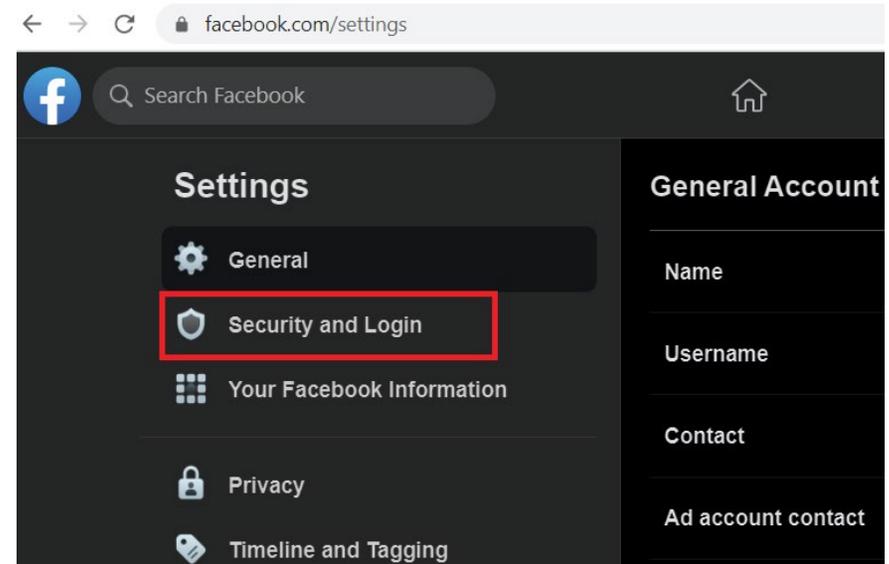
3. Click "Settings and Privacy".



4. Click "Settings".

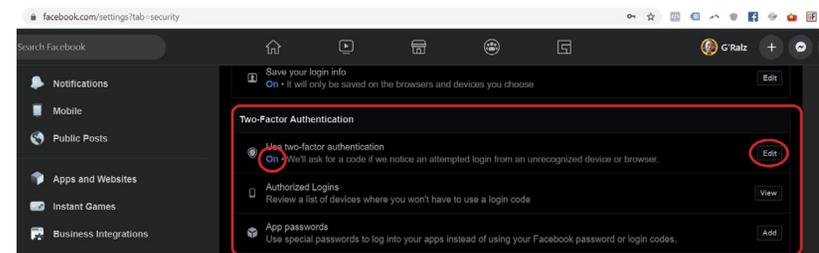


5. Click "Security and Login".



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

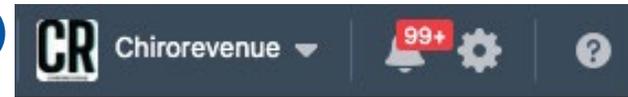
CHECKLIST

- 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 Chirorevenue business ID: **1830965433827492** and click **Next**.
- 5. Once Chirorevenue is added to your list of partners, you can start assigning Assets (Pages, Ad Accounts, Apps, Pixels, etc.).
- 6. Select **Chirorevenue** 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**.

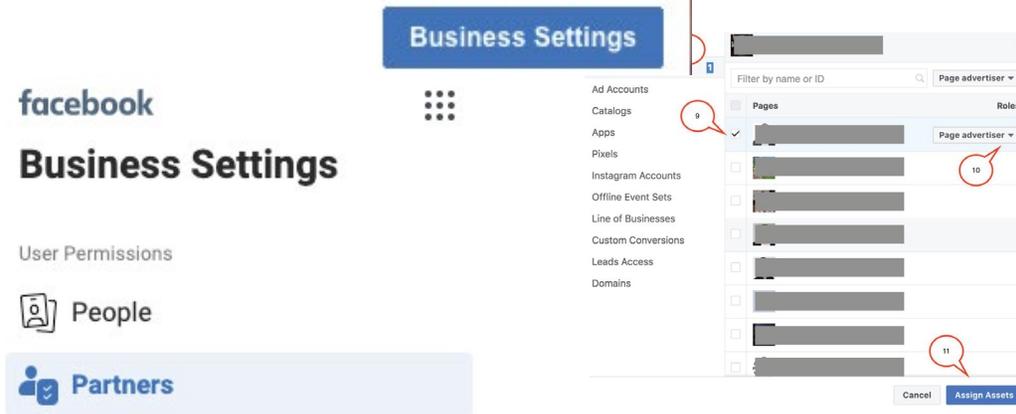
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HOW TO GRANT INSTAGRAM ACCESS

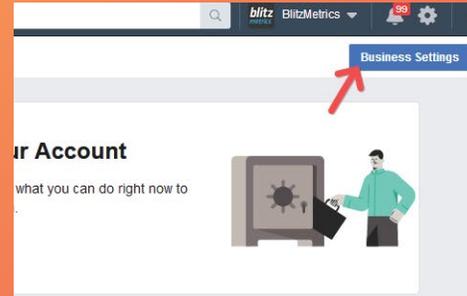


- 1) Log in to [FB Business Manager](#).
- 2) Click on Business Settings.
- 3) On the left pane of Business Settings, under Accounts, select Instagram Accounts.
- 4) Click the Add button. Enter the username and password for your Instagram account.
- 5) Select the IG account, then click on Assign Partners.
- 6) Enter Chirorevenue business ID: **1830965433827492** and click Next.

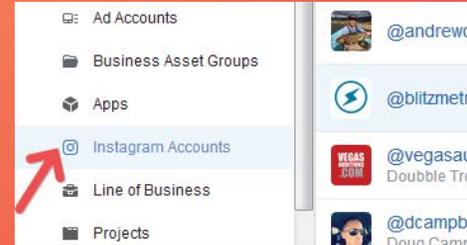


Liked by tristan parmley and 98 others

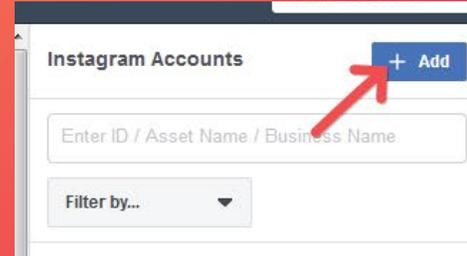
Step 2



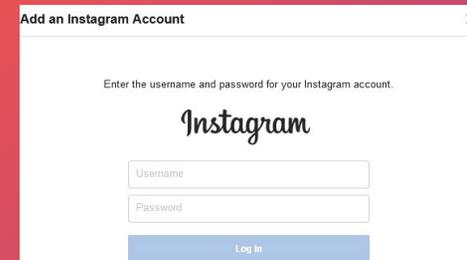
Step 3



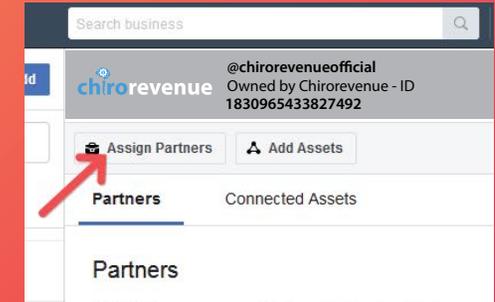
Step 4.1



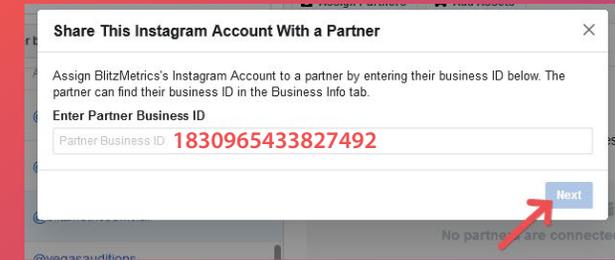
Step 4.2



Step 5



Step 6



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.

GOOGLE TAG MANAGER SET-UP

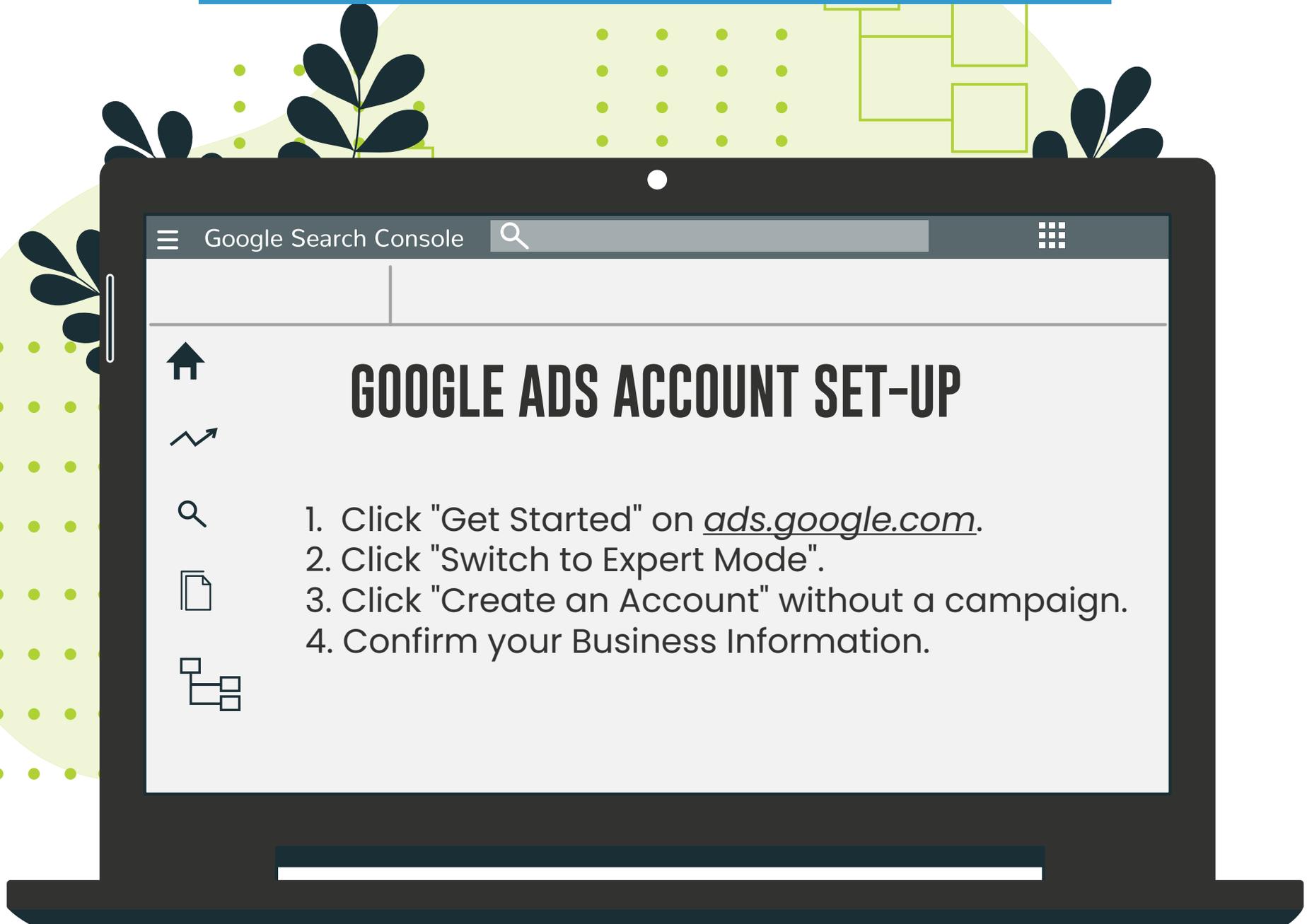
1. Create an account at tagmanager.google.com
2. Set up a container.
 - Give your container a descriptive name.
 - Type of content it'll be associated with (Web).
3. Click "Create".
4. Review Terms of Service and Click "Agree".

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 ADS ACCOUNT SET-UP

1. Click "Get Started" on ads.google.com.
2. Click "Switch to Expert Mode".
3. Click "Create an Account" without a campaign.
4. Confirm your Business Information.



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@chirorevenue.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 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

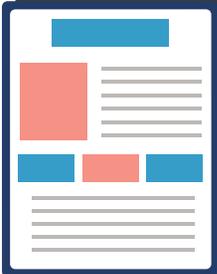
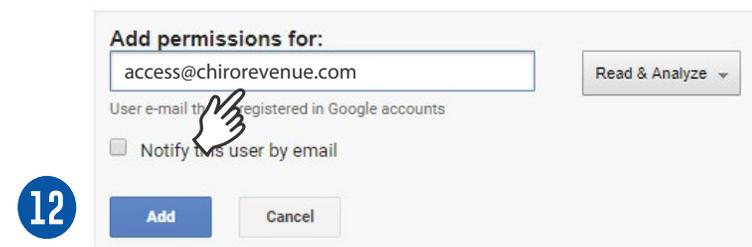
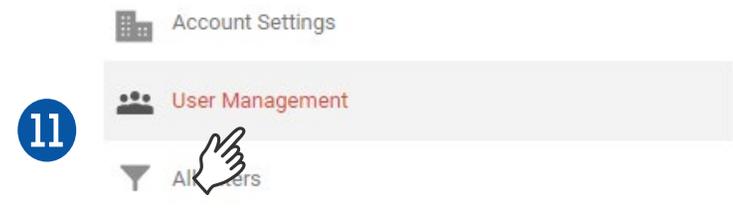
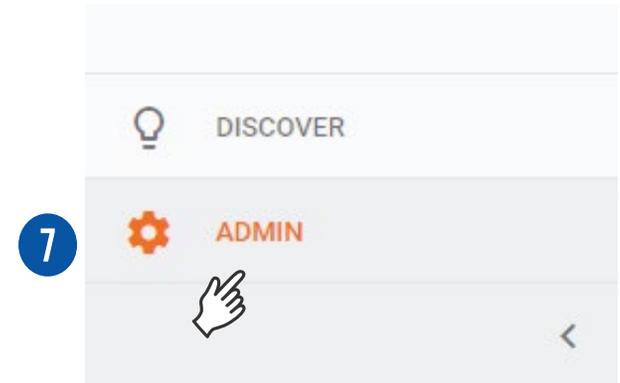
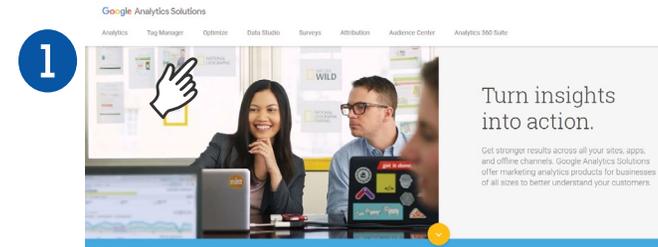
The word "ADS" is written in large, white, sans-serif capital letters on a blue background.

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@chirorevenue.com as a user with **Manage > Edit permissions**.



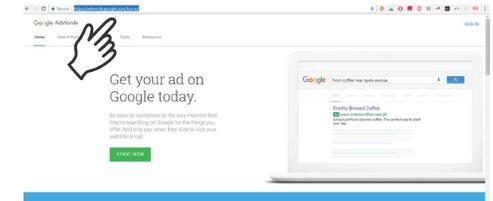
GRANT GOOGLE ADS

STEPS 1-8 TAKE ~5 MINUTES

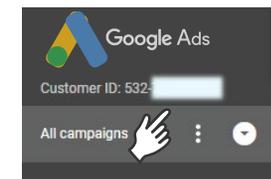


- 1. Log in to <https://ads.google.com>.
- 2. Copy and email your account number to access@blitzmetrics.com.
- 3. You will receive an email request to **add BlitzMetrics as a client manager**.
- 4. Go to Google Ads and click on the **gear icon** in the upper-right corner of your account.
- 5. Select **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**.

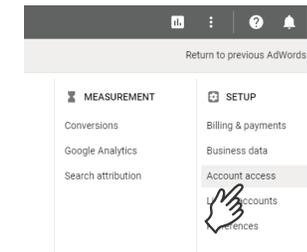
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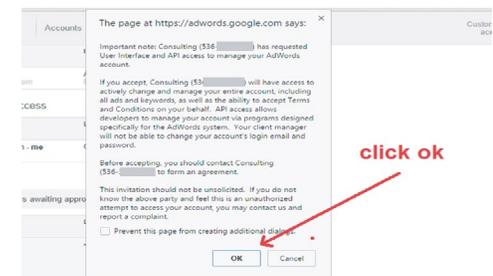
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YOUTUBE

In order to get started with Youtube you must convert your account to a brand account. Only the owner of a Brand Account can grant people access to a YouTube channel.

1. On YouTube, sign in as the owner of the Brand Account.
2. In the top right, click the account icon and select the channel you want to manage.
3. Go to the channel's account settings by clicking the channel icon > then Settings or settings icon.
4. Click Add or remove managers. You'll be redirected to the "Brand Account details" page.
5. Click Manage permissions. You'll see a list of people who can manage the account.
6. To invite new people, choose Invite new users Ask people to manage.
7. Enter amprorevenue@gmail.com.
8. Below the name, choose admin.
9. Select Invite and then Done.

The screenshot shows the YouTube account settings for 'Chirorevenue' (amprorevenue@gmail.com). A blue circle '1' is next to the account icon. A blue circle '2' is next to the 'Channel status and features' section, which includes 'Add or manage your channel(s)' and 'View advanced settings'. A blue circle '5' is next to the 'Manage permissions' section, which lists 'Ronald House' as the 'Primary owner' and 'You (Chirorevenue)' as a 'Manager'. A 'DONE' button is visible at the bottom right of the permissions list.



PRACTICE LIST

For us to run a Reactivation, Review, or any other texting & email campaign, we must upload your practice lists into your Chirorevenue CRM. These lists also allow us to retarget, remarket, online as well.

We only need their **First Name | Last Name | Email | Number | Birthday** for our campaigns. All other info can stay in your PRM

1. Login to your patient portal to access your customer list.
 - a. Segment the following lists:
 - I. **All Contacts**
 - II. **All Contacts** to the past 6 months
 - III. **All Active** Patients (Past 6 months up until today)
2. Export these 3 lists labeled clearly.
3. Double check that your list is formatted correctly & only includes the information we need
4. Send all 3 lists in the private google drive folder for your practice.

LIST TROUBLE?

Depending on the software you use, exporting is different. Our team can clean lists & fix formatting, but the lists must be segmented. This is absolutely critical to the success of your campaigns.

Website Access



1. Log in to your Administrator Account.
2. Go to "Users" Section.
 - Add New.
3. Add access@chirorevenue.com as an Editor.
 - Input "Chirorevenue 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@chirorevenue.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 Chirorevenue 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 Chirorevenue through access@chirorevenue.com.

For membership funnels with **Restricted Access**:

After steps 1 to 4:

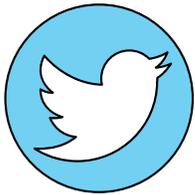
5. Go to "Membership Area".
6. Click "Members".
7. Click "Edit" on the login you created from BlitzMetrics.
8. Click "Purchase".
9. Add "Purchase or Product Access" to assets you want Chirorevenue to have access to.
10. Click "Save".

ClickFunnels Tutorial: Manually Add New Members:

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

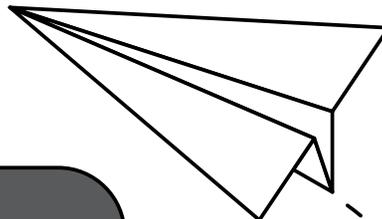
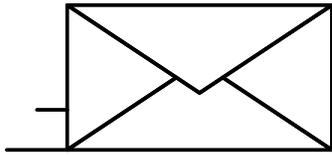
TWITTER ADS ACCOUNT SET-UP

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.

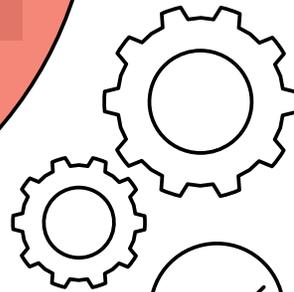
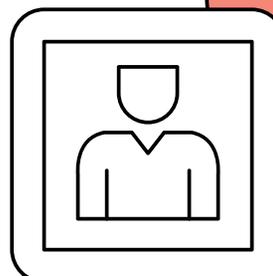
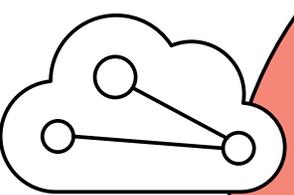
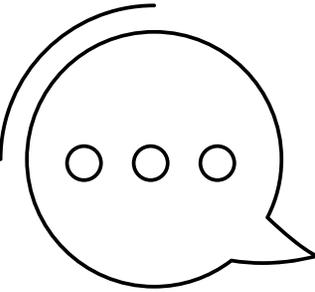


HOW TO GRANT TWITTER AD ACCOUNT ACCESS

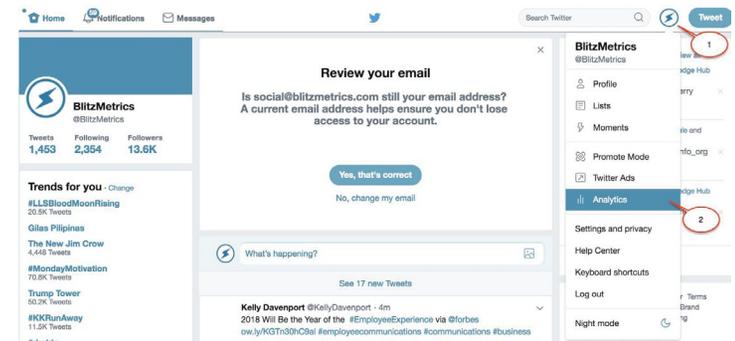
(OPTIONAL)



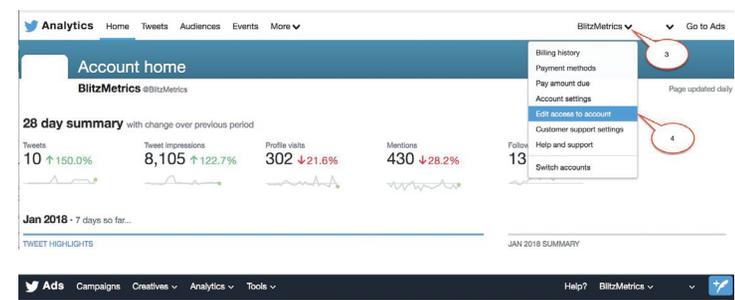
1. Go to Profile and Settings
2. Click Analytics
3. Click on your Account Name
4. Click Edit access to account
5. Click on Add Access
6. Type in "@Chirorevenue"
7. Select Ads Manager
8. Save changes



2



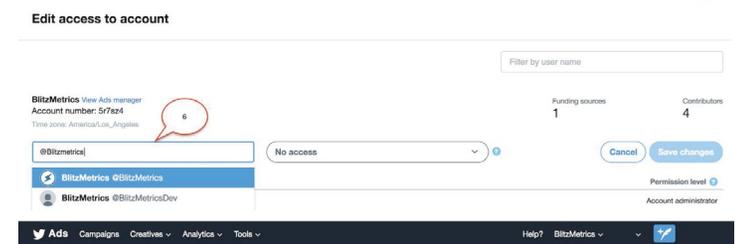
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LinkedIn

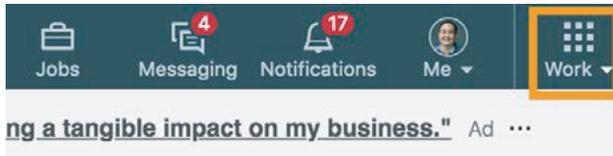
ADS ACCOUNT SET-UP

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**.

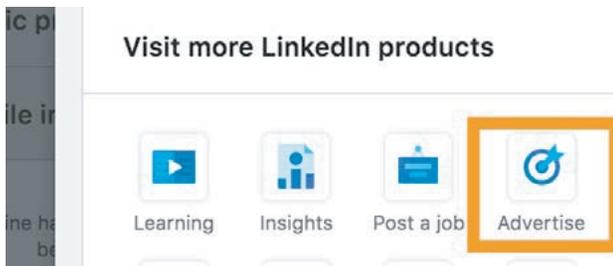
LinkedIn GRANT ACCESS TO LINKEDIN AD ACCOUNT

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

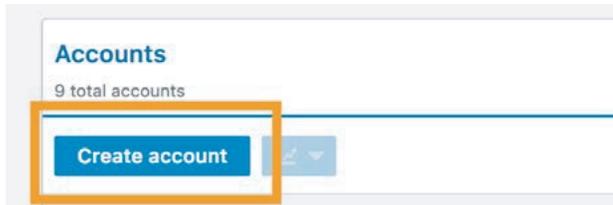
1. Access your [LinkedIn Profile](#).
2. Click the 9 boxes icon.



3. Click Advertise



4. Click "Create Account"



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

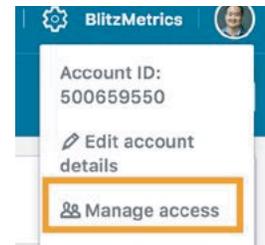
A screenshot of the 'Create account' form. The 'Create new company page' button is highlighted with an orange box. The form includes fields for 'Account name', 'Currency', and 'Associate a Company Page with your account (optional)'. A 'Save' button is at the bottom right.

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"

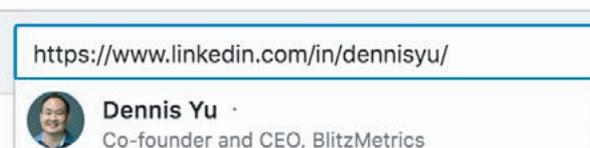


User Permissions

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.



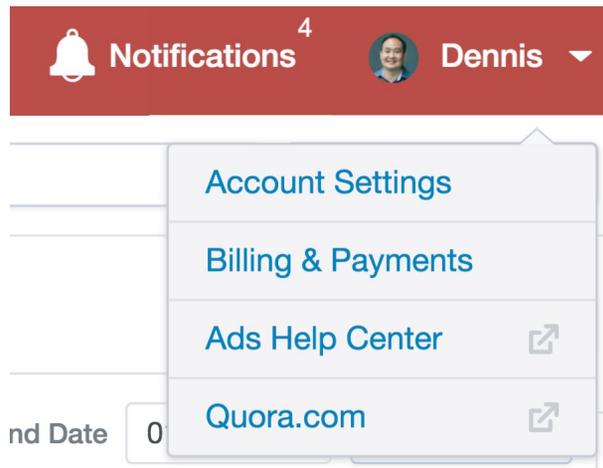


GRANT ACCESS TO QUORA AD ACCOUNT

(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

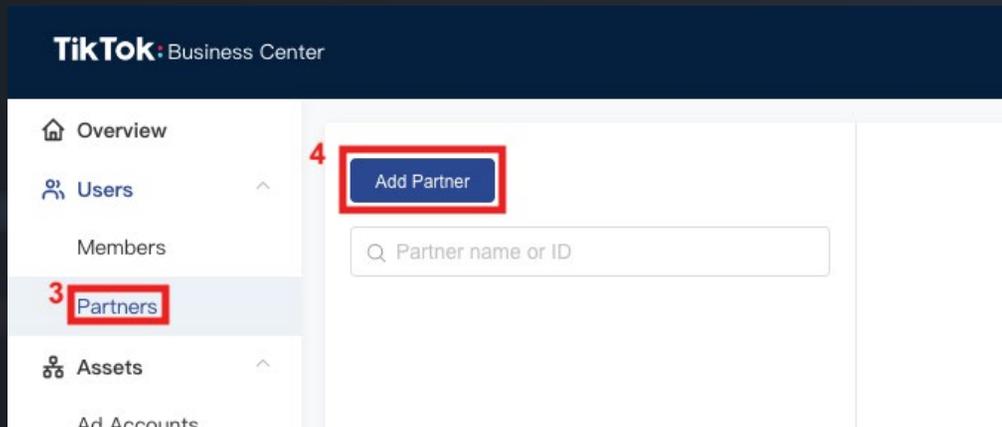


AD ACCOUNT

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 Chirorevenue as a Partner by pasting our Partner ID in the provided box.
Chirorevenue Partner ID: 1830965433827492
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.

FREQUENTLY ASKED QUESTIONS

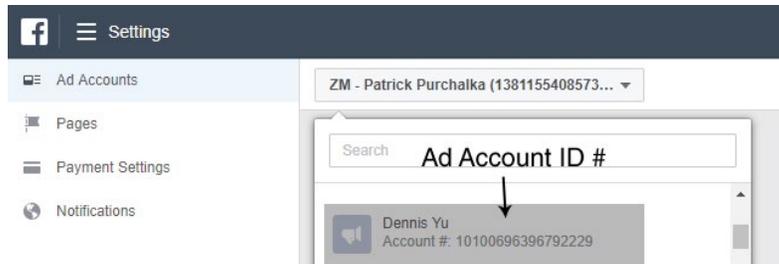


Q: Why don't I see any "Assign Partner" button when I'm trying to grant access for either my Facebook Page or Ad Account?

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:

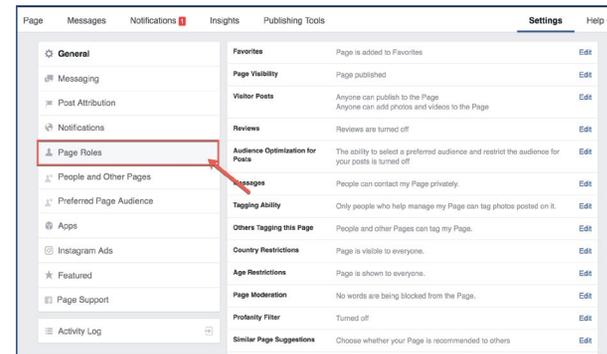
For a Facebook Page: Email the URL of your page to operations@blitzmetrics.com using the subject line "FB Page Access". We will then manually request access and email you the next steps when completed.

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.



chirorevenue

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

