chirorevenue

ACCESS CHECKLIST

Tristan Parmley
Co-Founder

WELCOME!

Let's get you all set up!
Welcome to the Chirorevenue Checklist.

Before we begin implementing our campaigns, strategies, or tactics, we need a few key pieces. Some of these you will have, others you may have to create, and others we'll set up with you.

Once our team has access to everything we can begin with your projects!

Start with your onboarding form we've sent you. It can also be found here. chirorevenue.com/onboarding

chirorevenue

ONE PAGER CHECKLIST

- [ ] 📋 Onboarding Form
- [ ] Facebook Page
- [ ] Facebook Ad Account
- [ ] Facebook Business Manager
- [ ] Instagram (Optional)

- [ ] Google My Business
- [ ] Google Ads
- [ ] Google Analytics
- [ ] Youtube
- [ ] 📋 Your Website
- [ ] 📋 Practice Lists

ACL
ACCESS CHECKLIST

ACL - Access Checklist

Watch later   Share

DENNIS YU

WHAT YOU'LL LEARN

JAKE CAMPOLI
GRADUATE OF AGENCY MANAGEMENT COURSE

I got into, started looking at AdWords and then like Wordpress

LEVERAGED DIGITAL MARKETING INTO OTHER OPPORTUNITIES

We'll bring you on and teach you all the M&A stuff if you help us
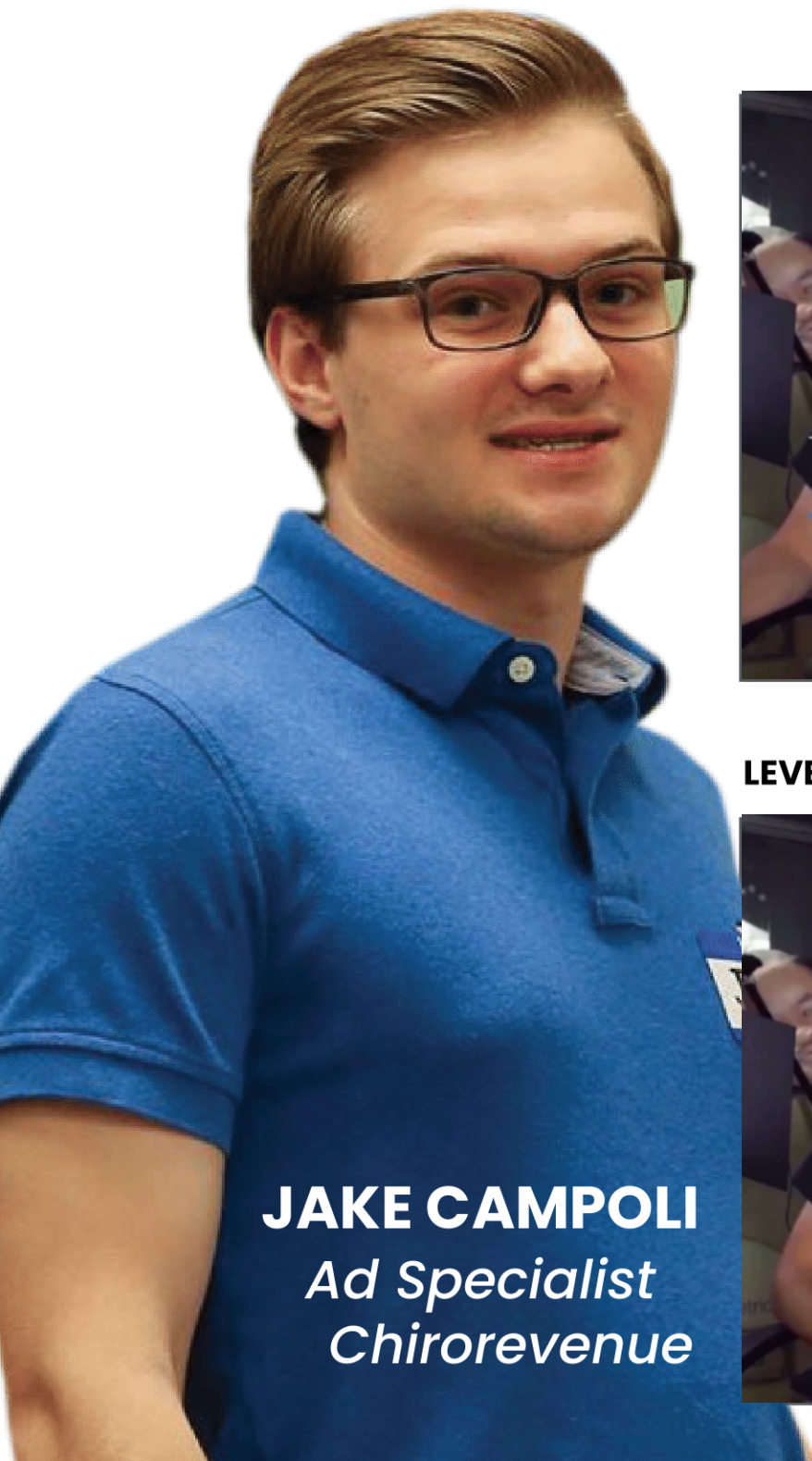
JAKE CAMPOLI
Ad Specialist
Chirorevenue

FACEBOOK PAGE

You must manage all of your assets in your Facebook Business Manager, that way you own all of your data, pages, and assets! Takes 1-5 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 us as an admin.
Enter Chirorevenue business ID: 1830965433827492
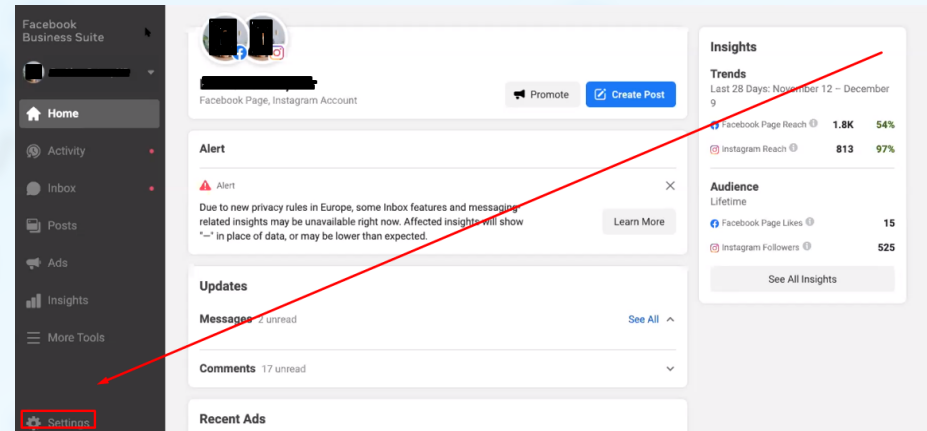
6. Click Connect.

1. Business Manager — LOG IN / CREATE ACCOUNT

Business Manager
Manage ad accounts, Pages, and the people who work on them — all in one place. It's free.

2. CR Chirorevenue — 99+
Business Settings

3. Business Settings
- Users
  - People
- Accounts
  - Pages

Pages
Enter ID / Asset Name / Busin... — Add
Filter by... — Sort By...

4. Assign Partner
Assign Partner by:
Business ID | Get Link to Share

5. Assign Chirorevenue's Page to a partner by entering their business ID below. The partner can find their business ID in the Business Info tab.
Enter Partner Business ID
Partner Business ID

Standard Access
Publish content
Publish as the Page.

Moderate messages and comments
Send messages and moderate comments as the Page.

Create ads
Advertise for the Page.

ADD FACEBOOK PUBLIC FIGURE PAGE

1. Log in to https://business.facebook.com/
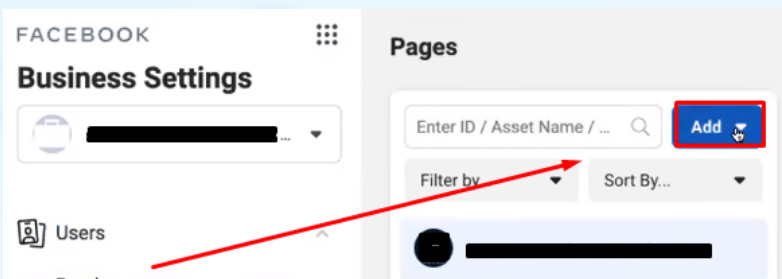2. Click "Settings".

3. Click "Business Settings".
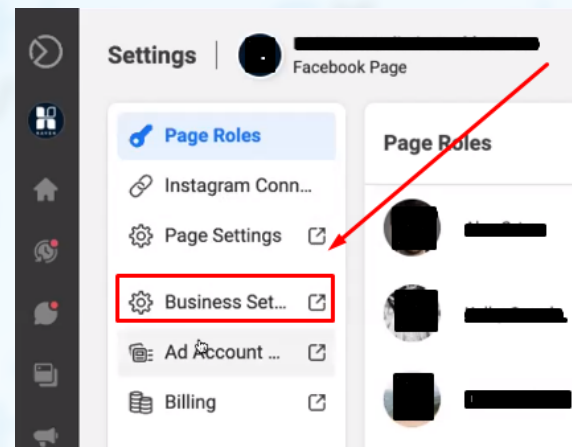
4. Under "Accounts", click "Pages".
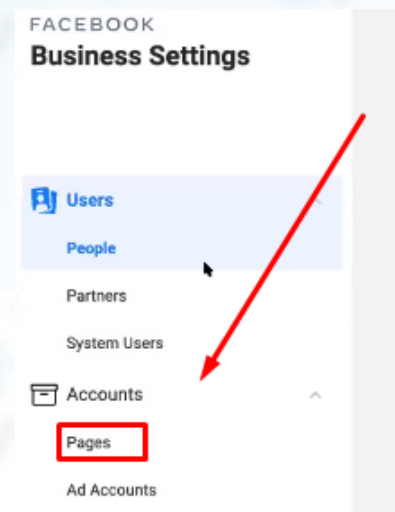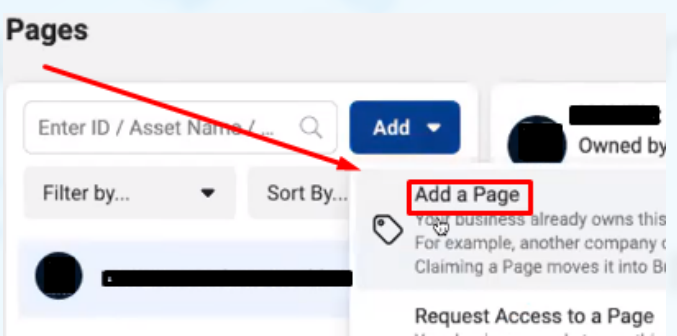
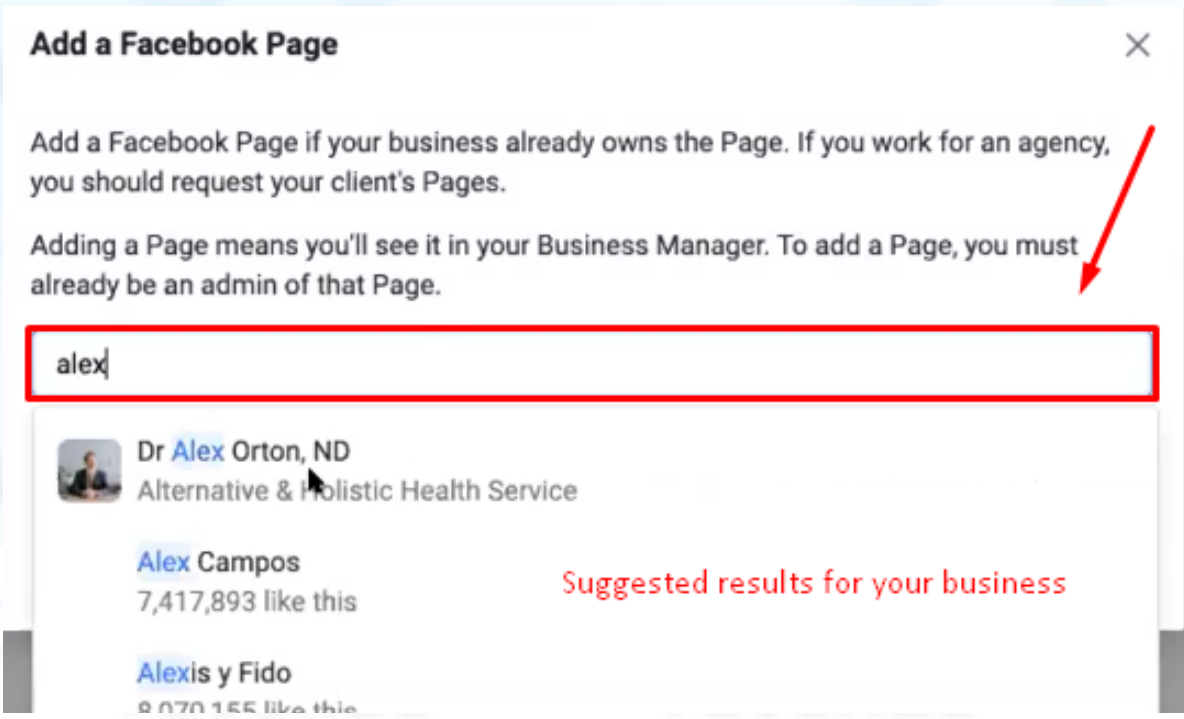5. Under "Pages", click "Add".

6. Click "Add a Page".

7. Write the URL for your Facebook Public Figure page.

Tip: You can also type the name of your business, and a drop-down may appear for your Public Figure Page.

8. Click "Add Page".

Add a Facebook Page

Add a Facebook Page if your business already owns the Page. If you work for an agency, you should request your client's Pages.

Adding a Page means you'll see it in your Business Manager. To add a Page, you must already be an admin of that Page.

If you're given permission to access this Facebook Page, you agree to Facebook's Terms and Pages Terms.

Cancel | Add Page

9. Click "Add All".

Add Page

This Page is currently owned by [████████] and linked with an Instagram business profile. Add both now by entering the Instagram password.

Details

Cancel | Add All

FACEBOOK AD ACCOUNT

1. Log in to business.facebook.com (activate your Business if needed)
2. Click on the Business Settings tab and select Ad Account.
3. Click on the Partner button.
4. Click on Connect your Page using your partner's business ID instead.
5. Select Admin when assigning our role.
Enter Chirorevenues business ID: 1830965433827492
6. Click Connect.

Facebook has begun disabling ad accounts which run ads for multiple dierent 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.

1.
Business Manager

LOG IN   CREATE ACCOUNT

Business Manager
Manage ad accounts, Pages, and the people who work on them — all in one place. It's free.

2.
CR Chirorevenue   99+ ⚙ ❓
Business Settings

3.
Users ^
People

Accounts ^
Pages
Ad Accounts
Business Asset Groups
Apps
Instagram Accounts

4.
Assign Partner   ✕
Assign Partner by:
Business ID   Get Link to Share
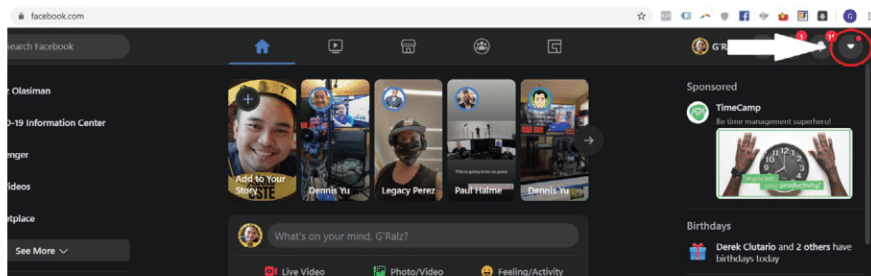Back

chirorevenue

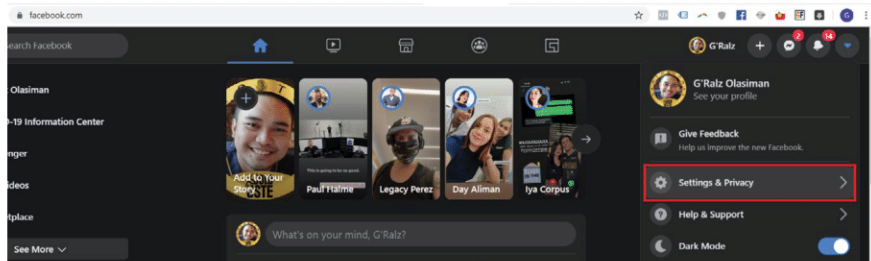# Activate Two-Factor Authentication on Facebook

Starting May 18, 2020, Facebook requires the use of two-factor authentication to access Business Manager.
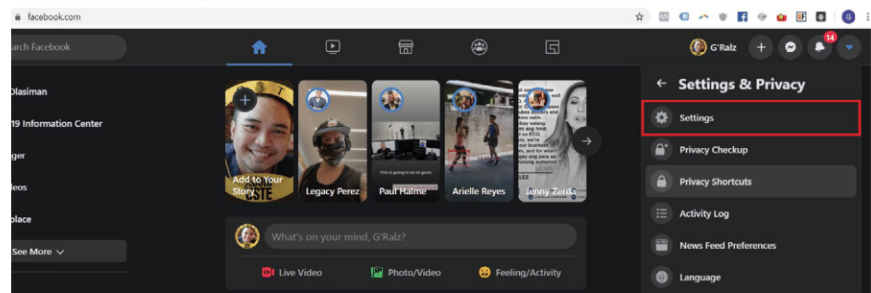
1. Log in to facebook.com

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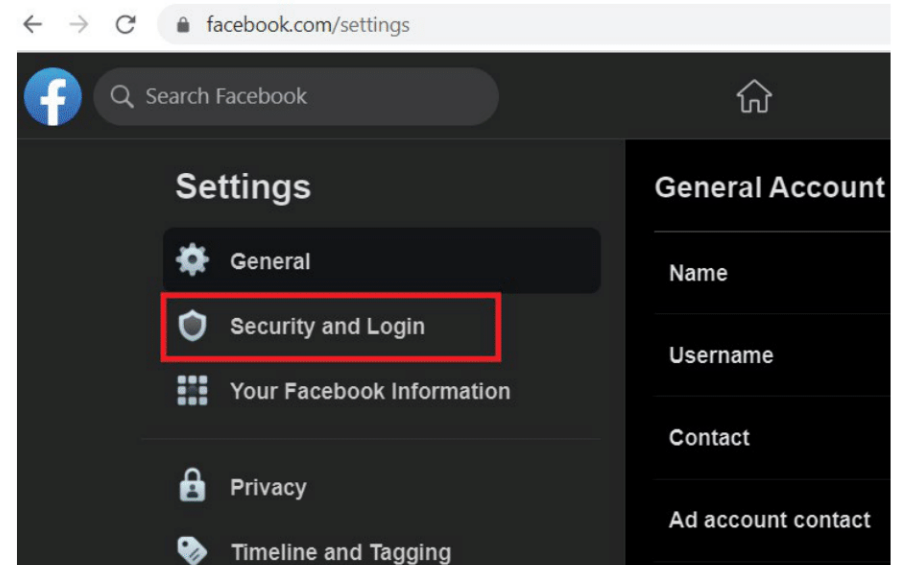

3. Click "Settings and Privacy".
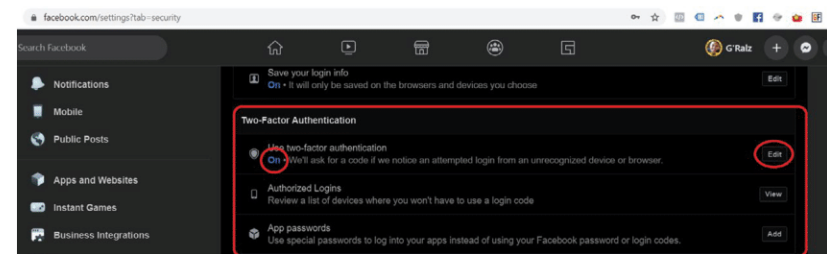

4. Click "Settings"

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 MANAGER ASSETS

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 admin, and click on Assign Assets.

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**.

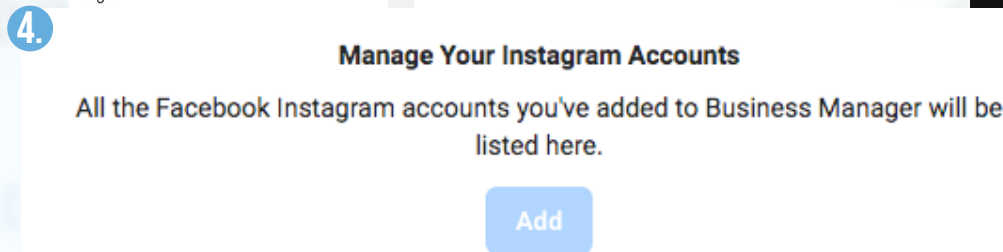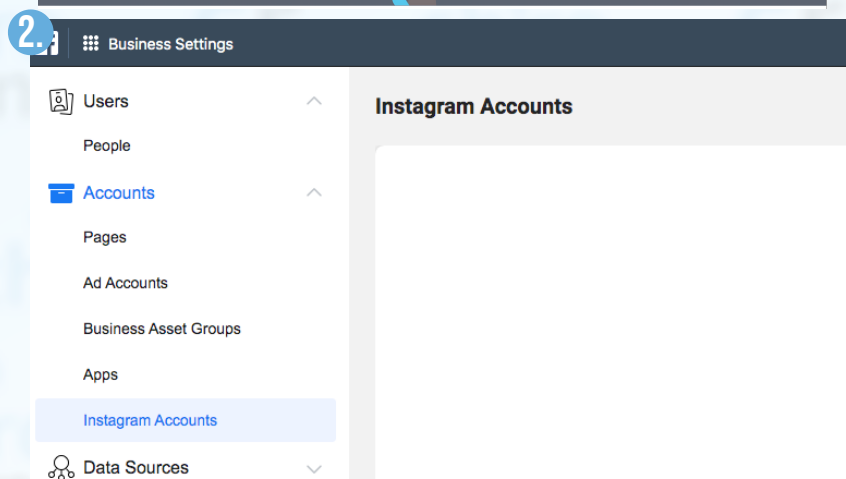Create Your Facebook Ad Account.

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.

INSTAGRAM

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.

1.

f Business Manager

LOG IN   CREATE ACCOUNT

Business Manager

Manage ad accounts, Pages, and the people who work on them — all in one place. It's free.

2.

⋮⋮⋮ Business Settings

👤 Users   ∧
   People

📦 Accounts   ∧
   Pages
   Ad Accounts
   Business Asset Groups
   Apps
   Instagram Accounts

👥 Data Sources   ∨

Instagram Accounts

4.

Manage Your Instagram Accounts

All the Facebook Instagram accounts you've added to Business Manager will be listed here.

Add

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

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.
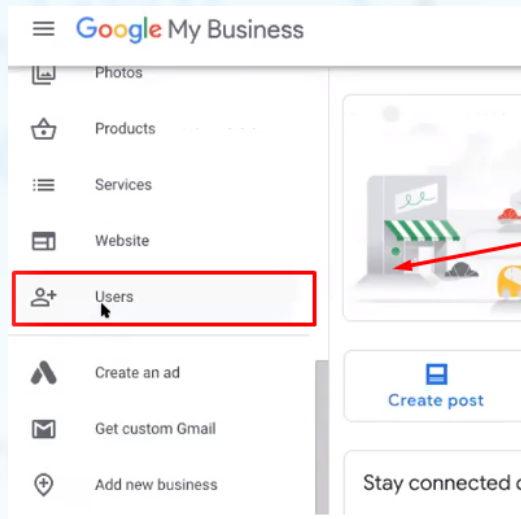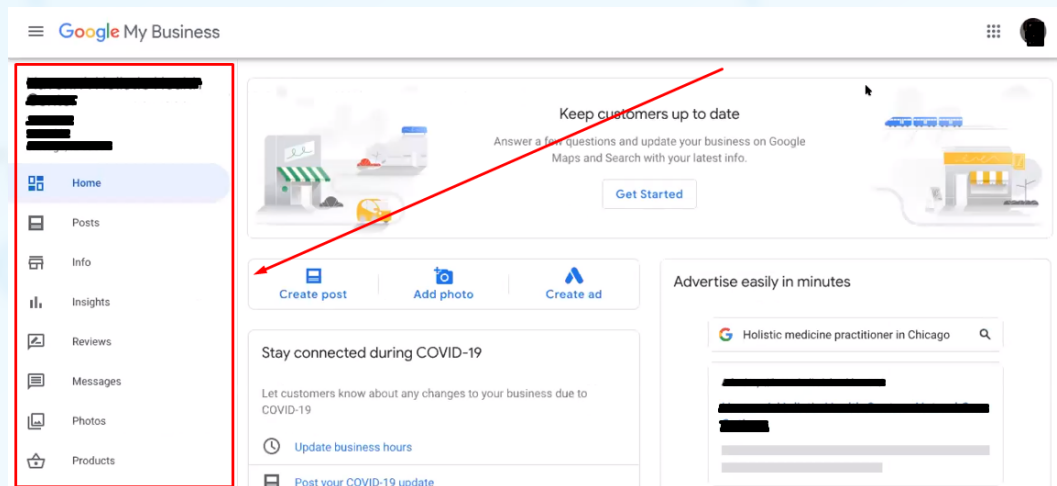
GOOGLE MY BUSINESS

1. Sign in to https://www.google.com/business/.
2. If you have multiple locations, open the location you'd like to manage.
3. At the left panel scroll down to find "Users".

4. Click "Users".

5. In the top right corner, click the "Add users" icon.

6. Write "access@chirorevenue.com" in the blank space.

Add new users

Allow others to help you manage business info, customer reviews, and YouTube videos. It's easy to assign different levels of access to each user. Learn more

+ Add names or email addresses

Choose a role ▾

CANCEL   INVITE

7. In the drop-down "Choose a role", select "Manager".

Add new users

Allow others to help you manage business info, customer reviews, and YouTube videos. It's easy to assign different levels of access to each user. Learn more

+ Add names or email addresses

Choose a role

Owner

Manager

Communications manager

CANCEL   INVITE

8. Click "Invite".

Invitees will have the option to accept the invitation and immediately become listing owners or managers

Add new users

Allow others to help you manage business info, customer reviews, and YouTube videos. It's easy to assign different levels of access to each user. Learn more

+ Add names or email addresses

Manager ▾

CANCEL   INVITE

GOOGLE ANALYTICS

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.

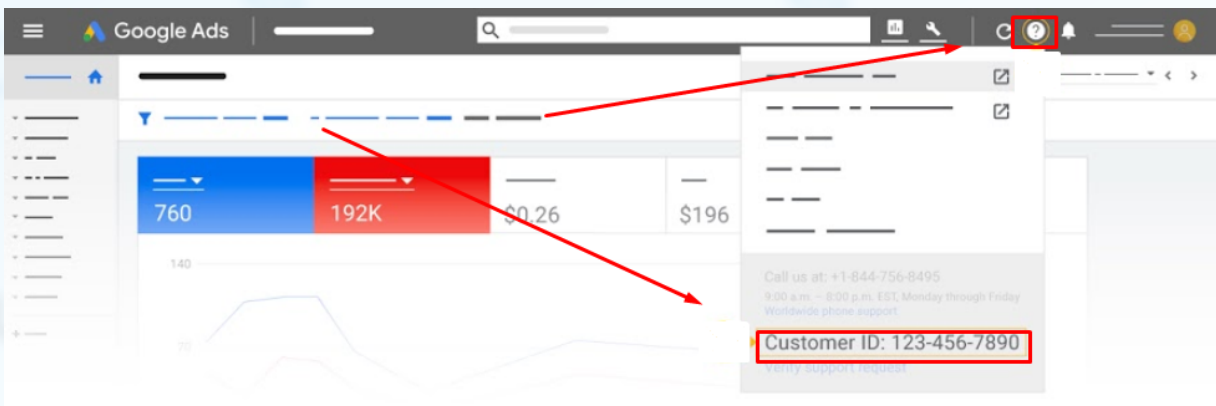12. Add access@chirorevenue.com as a user with Manage > Edit permissions.
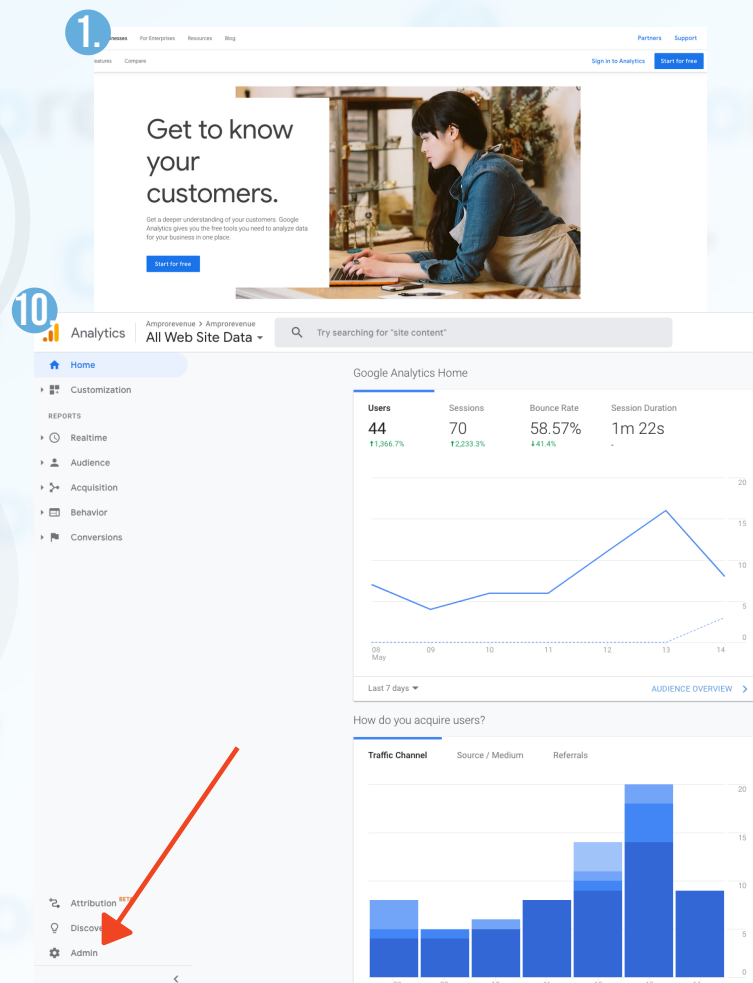
GOOGLE ADS

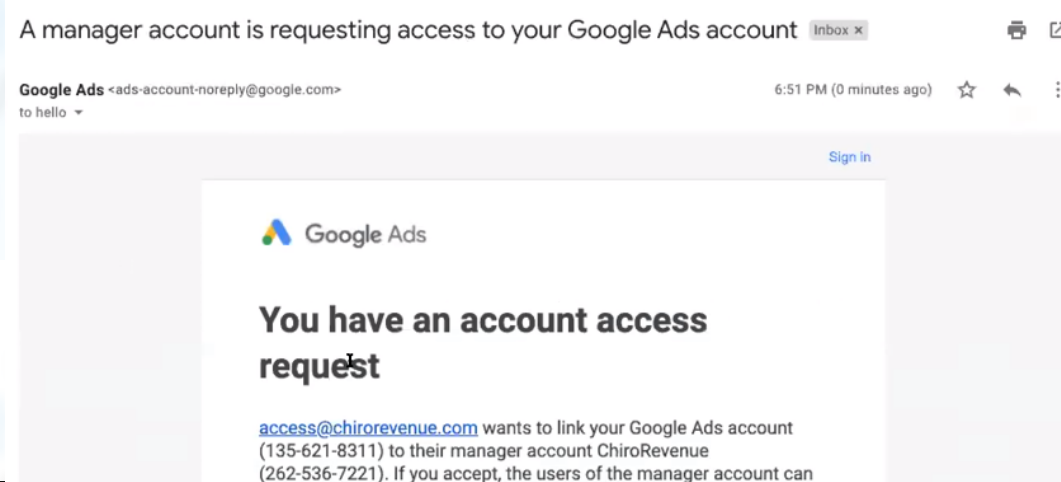1. Log in to https://ads.google.com.
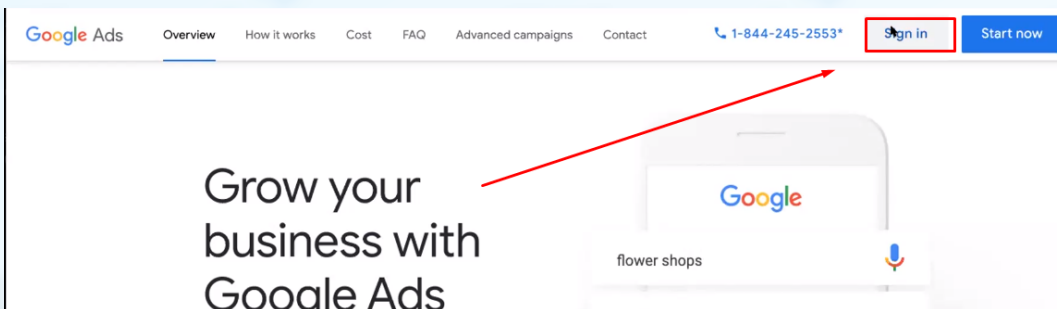
2. Find your Customer ID number by clicking on the "?" icon.

3. Send an email to access@chirorevenue.com with your Customer ID.

4. Wait for our team to send you an email request. Go to your inbox, find the email request to add Chirorevenue as a client manager.

chirorevenue

GOOGLE ADS

5. In the email, click "Accept Request", which will take you to the Google Ads website.

You have an account access request

access@chirorevenue.com wants to link your Google Ads account ▨▨▨▨▨▨ to their manager account ChiroRevenue (262-536-7221). If you accept, the users of the manager account can view, edit, and manage your account and its campaigns.

To grant access, accept the request.

ACCEPT REQUEST

If you don't know this manager account and think this request is an unauthorized attempt to access your Google Ads account, decline the request.

6. In the Google Ads website, click "Accept".

7. Click "Grant Access".

Google Ads | Access and security

| SEARCH | REPORTS | TOOLS & SETTINGS | BILLING |

USERS   MANAGERS   SECURITY

Link request ⓘ

Manager	Request received	Link sender	Actions
ChiroRevenue 262-536-7221	Dec 10, 2020	access@chirorevenue.com	**ACCEPT** DECLINE

▼ ADD FILTER

Manager ↑	Date linked	Manager type	Owner
▨▨▨▨▨	Jun 9, 2020	Google Ads	No

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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 "access@chirorevenue.com".
8. Below the name, choose admin
9. Select Invite and then Done.
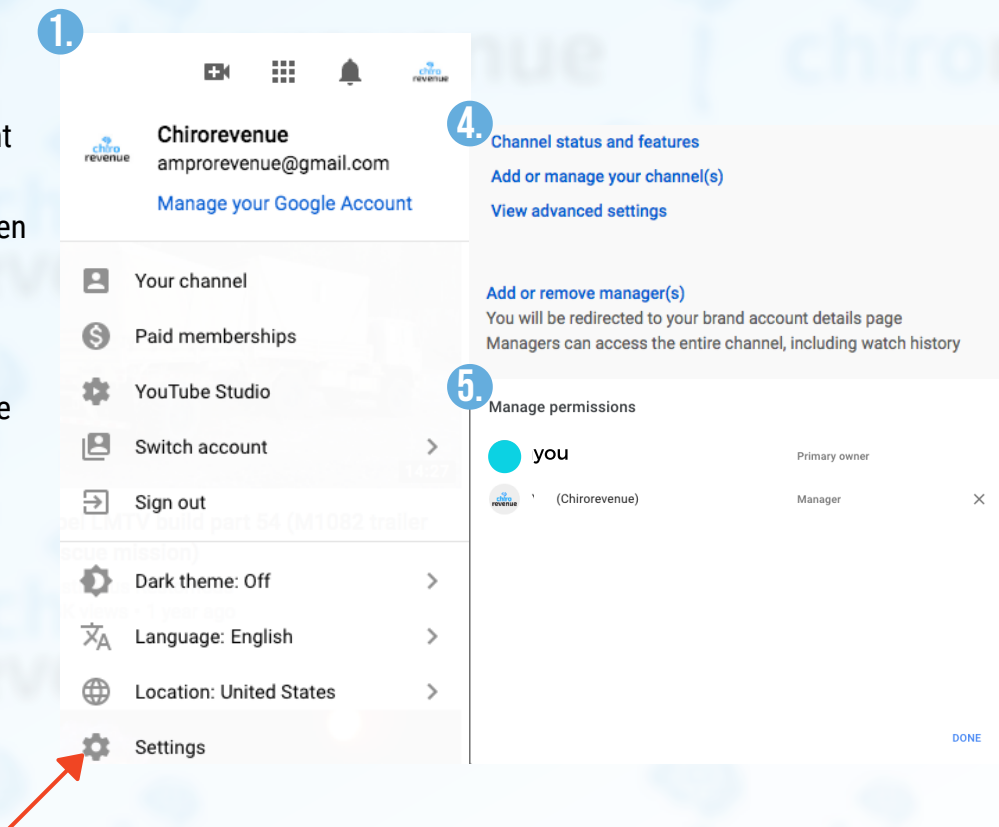
Website Access

WORDPRESS

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 stephaine@chirorevenue.com for specific instructions.

ADVANCED PLUMBING

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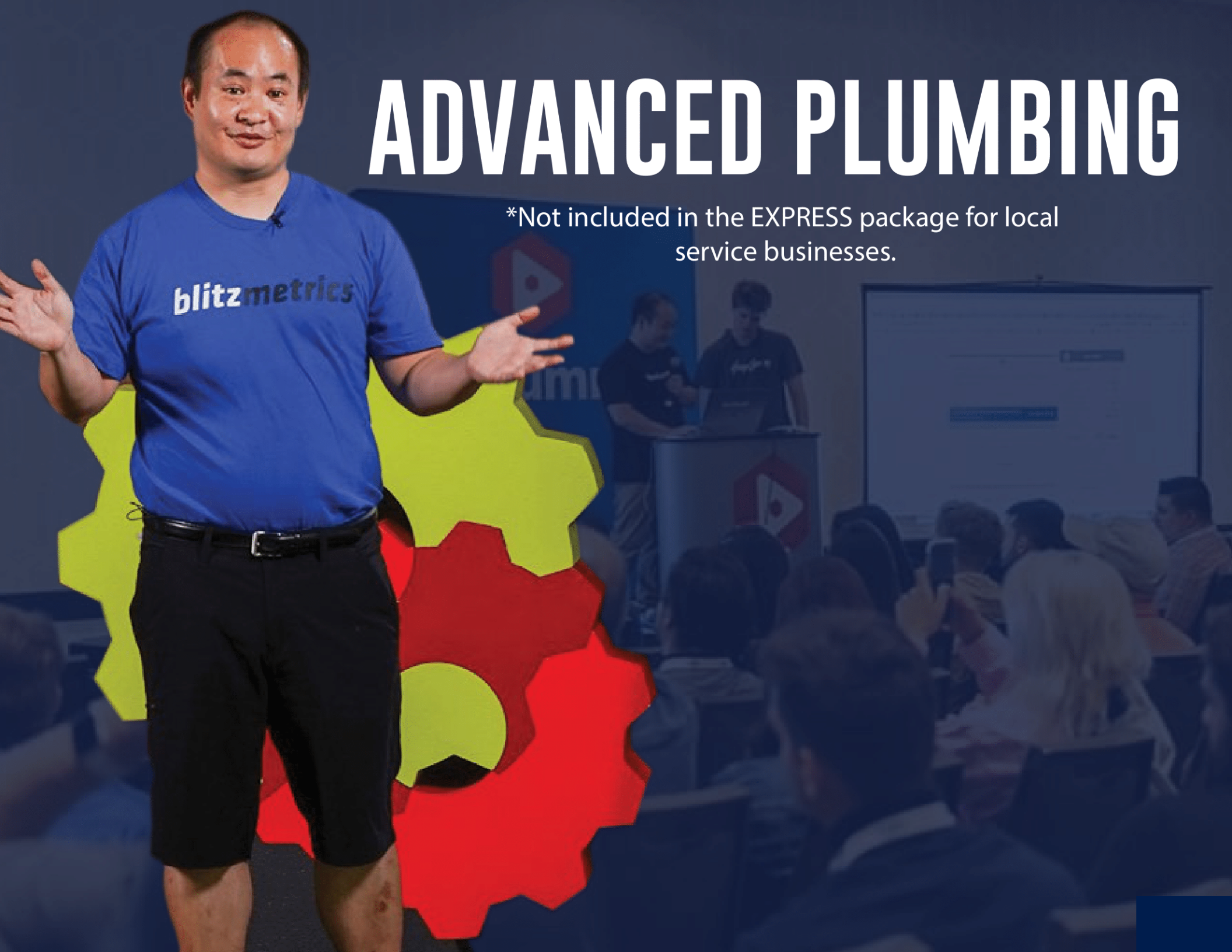
CLICKFUNNELS ACCESS

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 Chirorevenuethrough *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 for Chirorevenue.
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
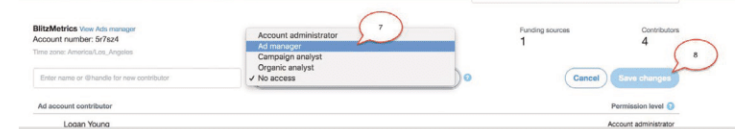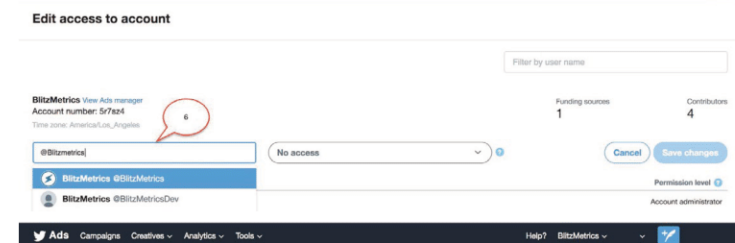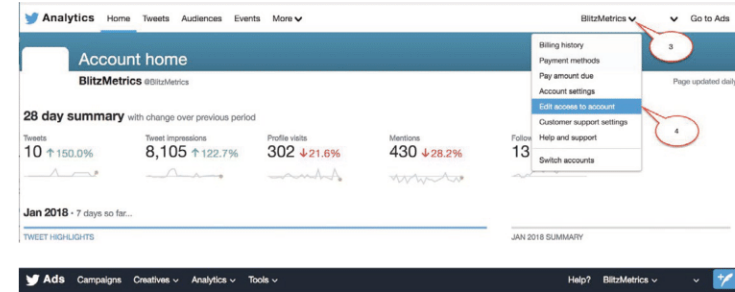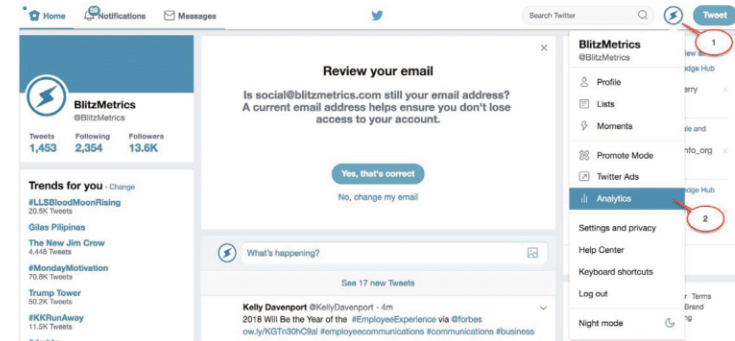
TWITTER ADS ACCOUNT SET-UP

1. Go to _Twitter.com_.
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**

Linked in

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.
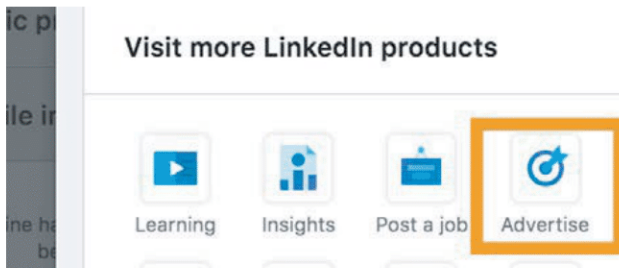4. Click **Create Account**.

Linked in GRANT ACCESS TO LINKEDIN AD ACCOUNT

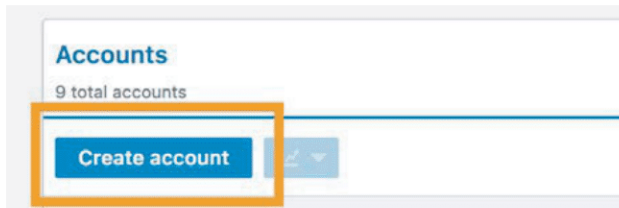**If you don't have a LinkedIn Ad Account or Business Page here's how to set it up:**

1. Access your *LinkedIn Profile*.

2. Click the 9 boxes icon.
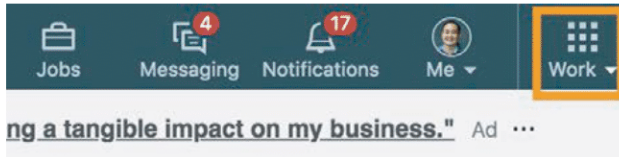
3. Click Advertise

4. Click "Create Account"

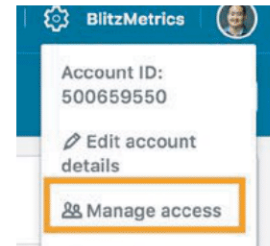5. Fill out info and if needed create a new Company Page.

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.
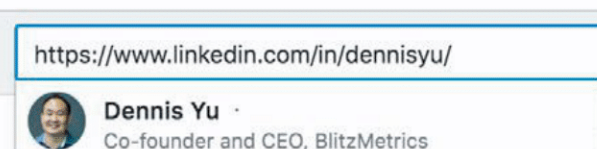
3. Click the settings Icon.
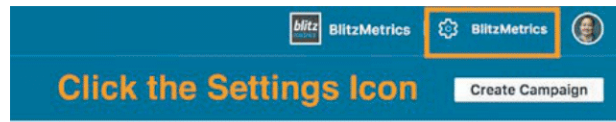
4. Click "Manage access"

User Permissions

Add user to account +

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

User Permissions

https://www.linkedin.com/in/dennisyu/

Dennis Yu ·
Co-founder and CEO, BlitzMetrics

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.
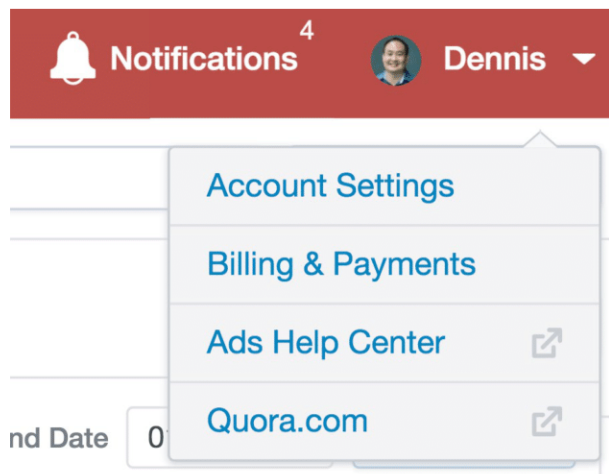
Q

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'.

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

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.

SNAPCHAT FOR BUSINESS

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 ♪ TikTok 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
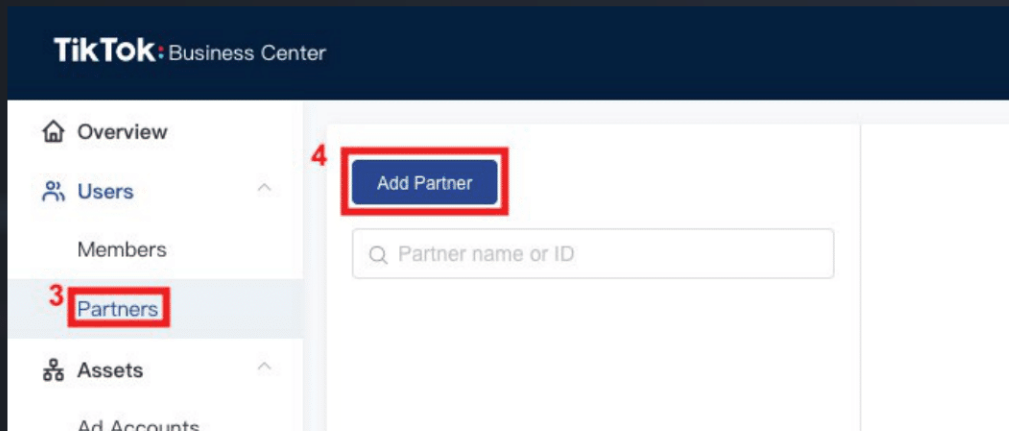
5. Invite Chirorevenue as a Partner by pasting our Partner ID in the provided box.
   Chirorevenue Partner ID: 1830965433827492
6. Assign admin permissions to our Business Center so that we can assign team members to work on your account and control their roles and levels of permission.

PRACTICE LISTS

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 Patients Prior** 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 Client Google Drive folder under "Docs and Files" in Basecamp project

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.
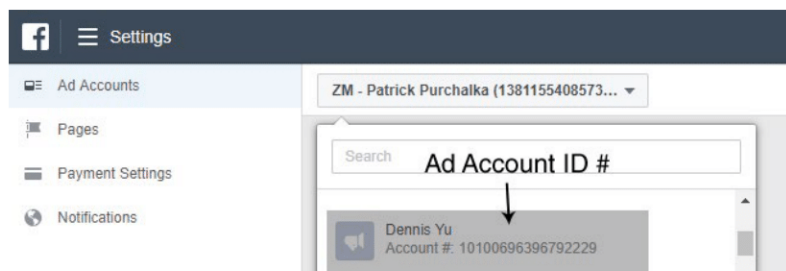
FREQUENTLY ASKED QUESTIONS

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 stephanie@chirorevenue.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 stephanie@chirorevenue.com using the subject line "FB Ad Account Access". We will then manually request access and email you the next steps when completed.

A: For a Facebook Page: Go to your Facebook Page, click on **Settings**, and then navigate to **Page Roles**. Here, you can confirm access.
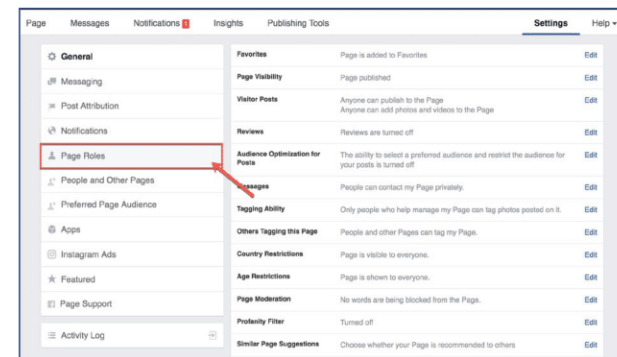
For a Facebook Ad Account: Check the notifications on your Facebook Business Manager, your Ad Account, your email, and the profile associated with the Ad Account or Business Manager. Depending on how your Business Manager was set up, and your role, the notification to approve access should show up in one of these four places.

IF YOU HAVE ANY QUESTIONS, DON'T HESITATE TO REACH OUT TO US ON BASECAMP!