



ACCESS CHECKLIST



Dennis Yu
Host of the CoachYu Show

GUIDE VERSION

coachyu_access_checklist_v12.9_2022_0202

Table of Contents

Welcome!	3
ACL Access Checklist	4
One-Pager Checklist	5
Facebook Page	6
Facebook Public Figure Page	7
Facebook Ad Account	8
Activate Two-Factor Authentication on Facebook	9
Facebook Business Manager	10
Facebook Business Manager Assets	11
Facebook Business Set-up: Create your Business Manager Account	12
Facebook Business Set-up: Create Your Facebook Ad Account.	13
Instagram	14
Link Instagram Account to Facebook Account	15
Google Tag Manager Set-up	16
Google Tag Manager	17
Google Business Profile (Google My Business)	18
Google Analytics Account Set-up	19
Google Analytics	20
Google Ads	21
Google Ads Account Set-up	22
Google Search Console	23
Wordpress Site	24
ADVANCED PLUMBING	24
SquareSpace Site Access	25
Other Service Provider	26

YouTube	27
TikTok Ads Account Set-up	28
Grant Access to TikTok Ad Account	29
TWITTER ADS ACCOUNT SET-UP	30
How to Grant Twitter Ad Account Access	31
LinkedIn Ads Accounts Set-up	32
Grant Access to LinkedIn Ad account	32
Quora Ads Account Set-up	33
Grant Access to Quora Ad Account (Optional)	33
Snapchat Ads Account Set-up	34
Practice Lists	35
Frequently Asked Questions	36

Welcome!

Welcome to CoachYu Access Checklist.



Before we begin implementing the 6 phases for you, or help you along in a POWER HOUR, we 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.

[Why do we need to do all this?](#)

If you have any questions don't hesitate to reach out to stephanie@blitzmetrics.com.

If you're having trouble, we are happy to schedule a Zoom call to walk you through this.

Access Checklist





ACCESS CHECKLIST

ONE-PAGE CHECKLIST

COACHYU

One-Pager Checklist

- ☐ [Facebook Page](#)
- ☐ [Facebook Public Figure Page](#)
- ☐ [Facebook Ad Account](#)
- ☐ [Activate Two-Factor Authentication on Facebook](#)
- ☐ [Facebook Business Manager](#)
- ☐ [Facebook Business Manager Assets](#)
- ☐ [Instagram](#)
- ☐ [Google Tag Manager](#)
- ☐ [Google Business Profile \(Google My Business\)](#)
- ☐ [Google Analytics](#)
- ☐ [Google Ads](#)
- ☐ [Google Search Console](#)
- ☐ [Wordpress Site](#)
- ☐ [SquareSpace Site](#)

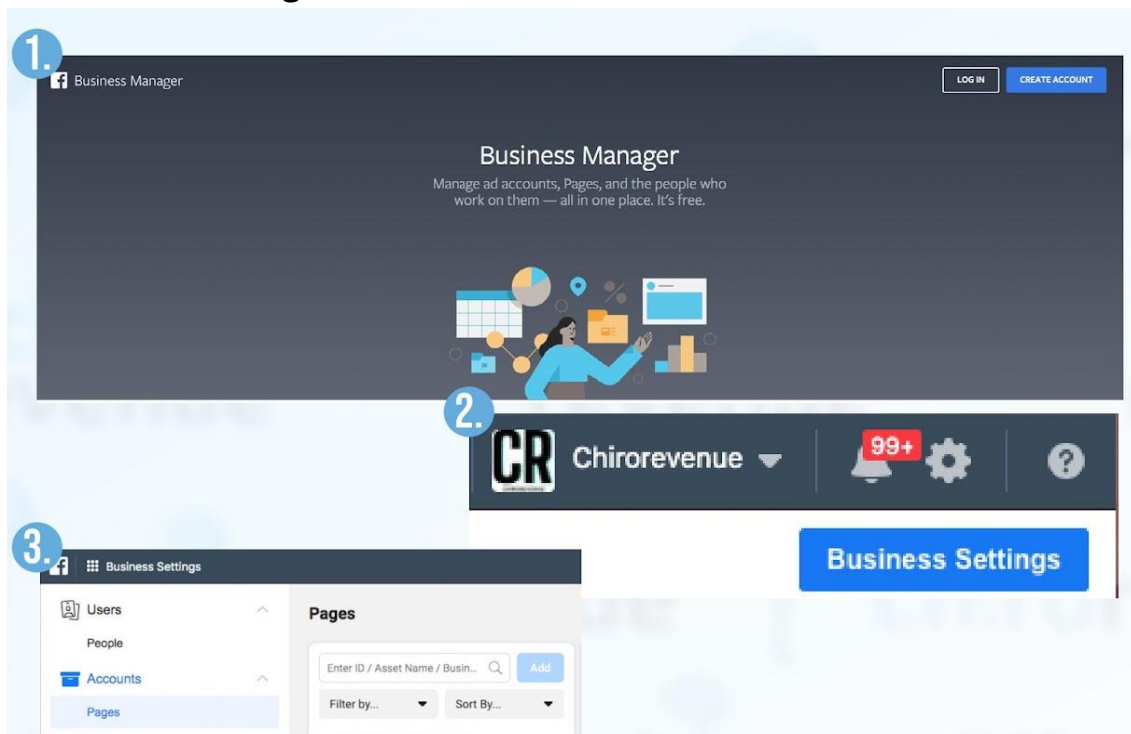
Optional

- ☐ [Other Website Provider](#)
- ☐ [YouTube](#)
- ☐ [TikTok](#)
- ☐ [Twitter](#)
- ☐ [LinkedIn](#)
- ☐ [Quora](#)
- ☐ [Snapchat](#)
- ☐ [Practice Lists](#)

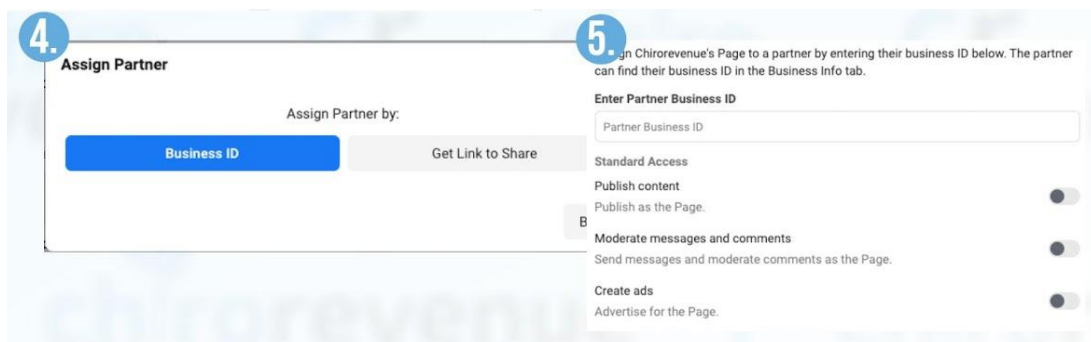
Facebook Page

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.



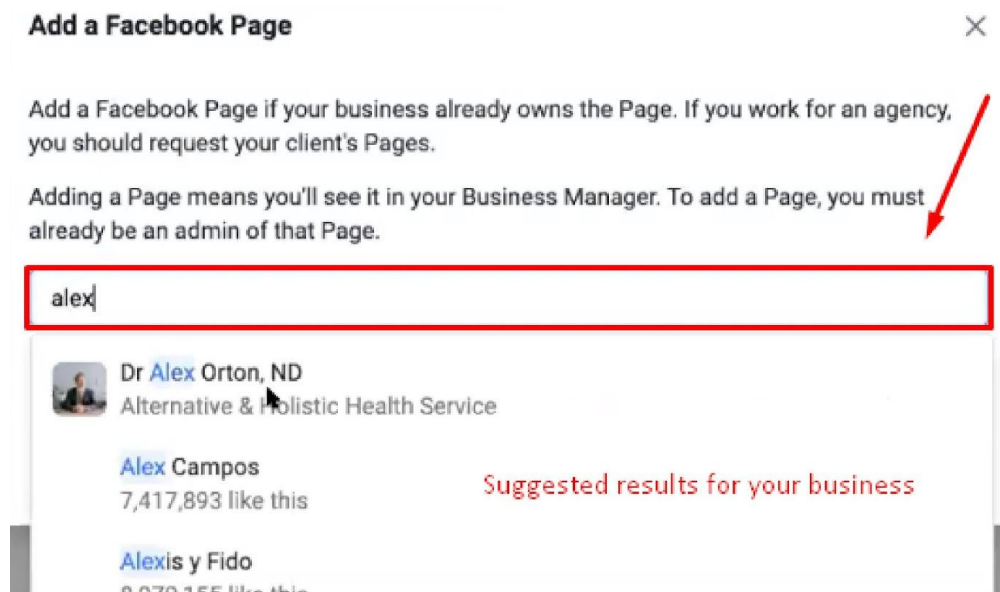
4. Click on **Connect your Page** using your partner's business ID instead.
5. Assign us as an admin. Enter Blitzmetrics' business ID: **552854764819146**
6. Click **Connect**.



Facebook Public Figure Page

Want to know the difference between a [Facebook public figure page](#) and [Facebook profile](#)?

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.

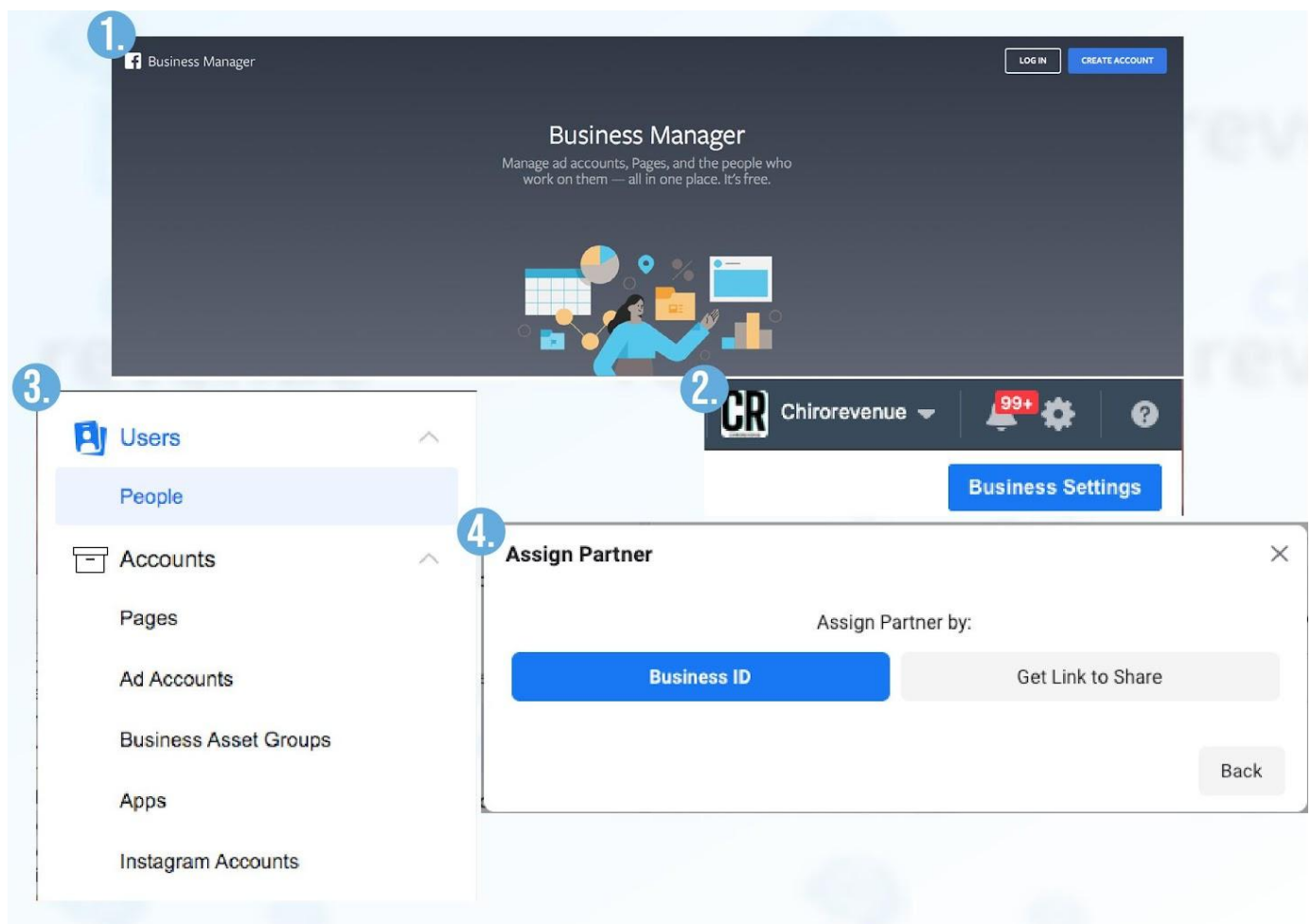


Tip: You can also type the name of your business, and a drop-down may appear for your Public Figure Page

8. Click **Add Page**.
9. Click **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 **Blitzmetrics' business ID:552854764819146**.
6. Click **Connect**.

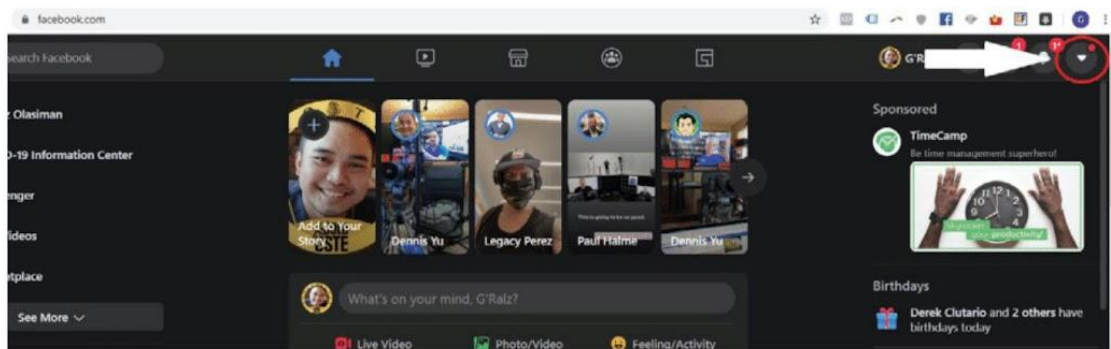


Facebook has begun disabling ad accounts which run ads for multiple different advertisers on a single ad account which is in violation of its advertising policies. All advertisers who have ad accounts running ads for multiple advertisers are required to create new ad accounts for each advertiser that 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 the "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**.
7. Choose Authentication Option of choice.



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)

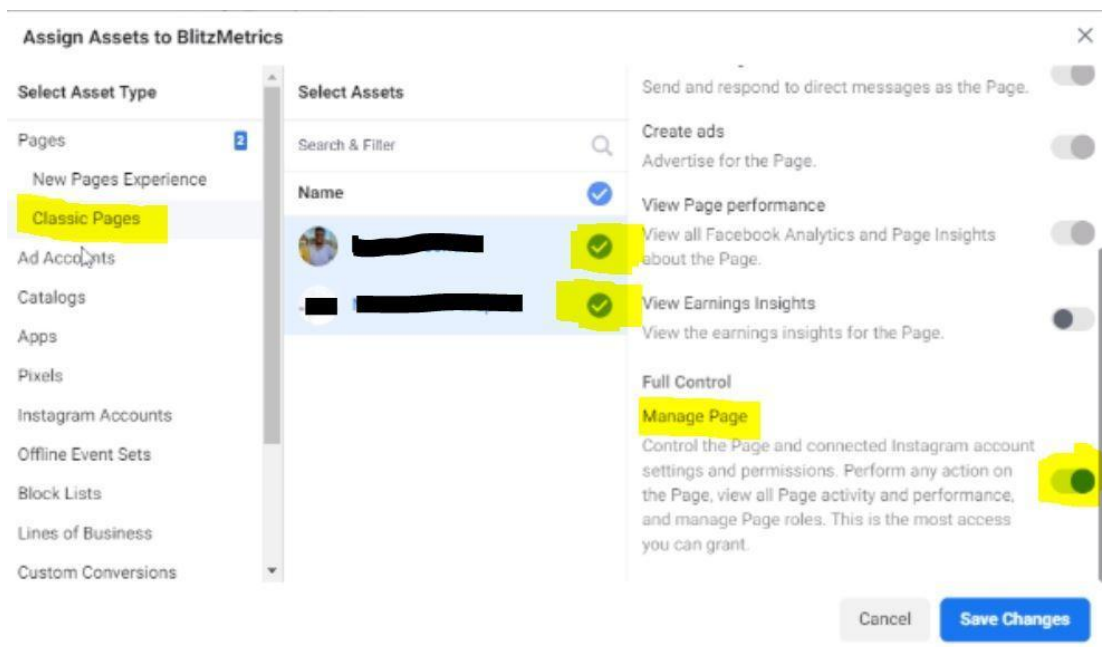
Use text message (SMS) to receive verification codes. For your protection, phone numbers used for two-factor authentication can't be used to reset your password when two-factor is on.

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

Facebook Business Manager

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 www.business.facebook.com
2. Click on Settings (gear icon). Then click on **More Business Settings**.
3. Under the **Users** menu click on **Partners**.
4. Click on **Add** at the top of the Partners panel. Then click on **give a partner access to your assets**.
5. Under **Partner Business ID** enter the following ID: **552854764819146**
6. In the next window, click on **Pages** > **Classic Pages**.
7. Select the assets that BlitzMetrics will be managing. And make sure that the **Manage Page** button is selected.

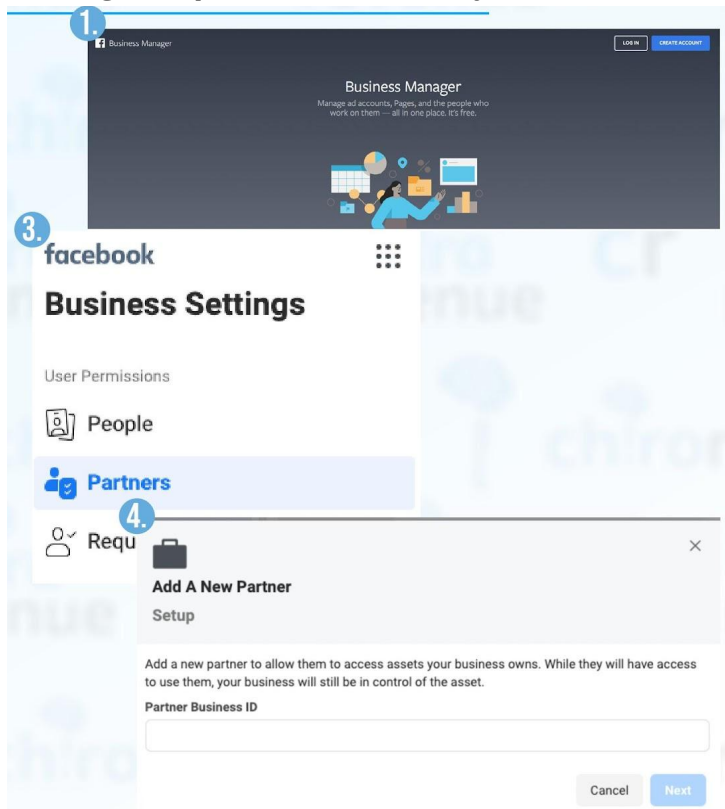


8. Next, click on the **Ad Accounts** tab.
9. Repeat **Step 7**.
10. Click **Save Changes**.

Facebook Business Manager Assets

Video Guide: [How To Share Your Facebook Assets](#)

1. Login to business.facebook.com (activate your Business Manager, if needed).
2. Click on the **Business Settings** icon (lower left corner, looks like a gear).
3. Click on the blue (+) Add button.
4. Select give a **partner access** to your assets.



5. Enter business ID **552854764819146** into the Partner Business ID field and click next.
6. On this screen, you can grant access to multiple assets. Choose a type of asset in the first column.
7. Select the assets you want to add your partner to in the second column. Assign a role for your partner in the third column. Repeat these steps until you've chosen roles for the following assets:
 - a. Facebook Pages (company and public figure pages)
 - b. Facebook Ad account
 - c. Facebook Pixel

- d. Instagram Account
- 8. Click **Save Changes**.
- 9. Repeat steps 1 to 7 using business ID "463099998012835".

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**.

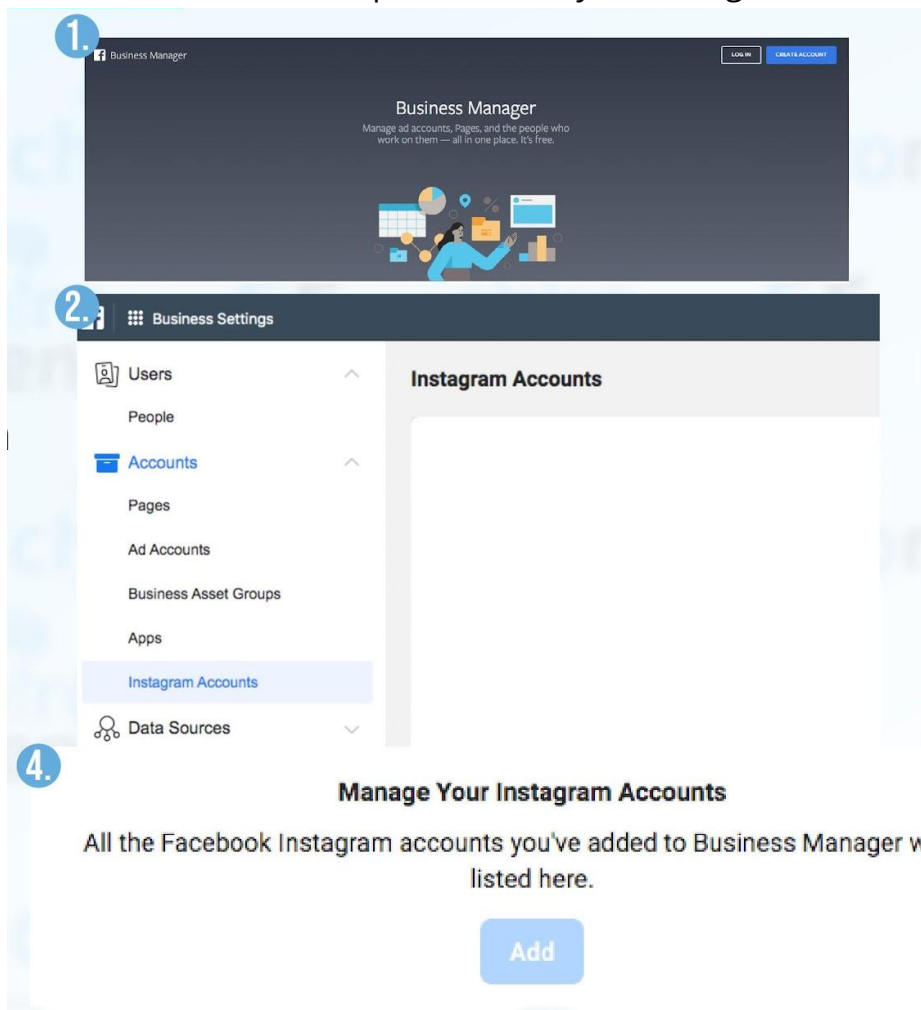
Facebook Business Set-up: Create Your Facebook Ad Account.

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 Blitzmetrics' Business ID **552854764819146** and click **Next**.

Thank You for previewing this eBook

You can read the full version of this eBook in different formats:

- HTML (Free /Available to everyone)
- PDF / TXT (Available to V.I.P. members. Free Standard members can access up to 5 PDF/TXT eBooks per month each month)
- Epub & Mobipocket (Exclusive to V.I.P. members)

To download this full book, simply select the format you desire below

