Wicked Fast Setup

Welcome to Wicked Reports!
Before we get you to your dashboard we'd like to walk you through th
steps below and make needed configuration changes. Each completed
at the end you'll be able to schedule audit call with Wicked Suppo

✓ Lead Authorization

✓ Order Authorization

✓ Facebook Authorization

✓ Google Analytics Authorization

Google AdWords Authorization Skipped
Google AdWords Tracking Template Update Completed

✓ Tracking Code Deployed

✓ Email Tracking

✓ Social Media Tracking

Well done! You are almost there. Now catch up with our support team
member to make sure you're good to go.

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Thank you for joining Wicked Reports.
We are thrilled to have you!

Let's get started with the WickedFast™ Setup process.

We will walk you through every step of the WickedFast™ Setup process. We want to make sure you're confident though, so, once you log into Wicked Reports and get started, you'll see that we have provided two additional resources to guide you along your way.

1	**2**
Each step of the process has an explainer video to help you with detailed information.	**You have access to The Wicked Academy, which contains more training.**

If you've just ordered, we know you're excited to get started. Our automations have been kicked off to get your account setup. In the meantime, here's an overview of the onboarding process so that you know what to expect next and can start getting ready.

During WickedFast Setup you will:

1	**Authorize a source (or sources) of Contacts and Lead data**	This will typically be your CRM. Most CRMs can use OpenAuth, some will require copying API keys. Instructions for authorizing your specific CRM will be provided. To get ready, make sure you have your login credentials.

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You can review the entire [list of available CRMs](#) for which we have native integrations to make sure yours is supported.

If yours is not listed, you may be interested in a Custom API integration, or, if your CRM supports webhooks, our HTTP Post Contact functionality.

2	**Authorize a source (or sources) of Order and Product data**	This will typically be your Shopping Cart Software or Payment Processor. Like your Contact Source, you will need your credentials and the specific instructions will be provided on our Authorizations page. You can review the [list of natively supported Shopping Carts and Payment Processors](#) to make sure yours is supported. If yours is not listed, you may be interested in a Custom API integration, or, if your Cart/Processor supports webhooks, our HTTP Post Order functionality
3	**Authorize your Facebook ad account**	To authorize your Facebook Ad account you must be an Administrator and we strongly recommend you have your ad account associated with a Facebook Business Account. You will also be given the opportunity to authorize Facebook Offline Conversion tracking, which re recommend as it will help Facebook optimize your ad targeting and improve the quality of your data and attribution in Wicked Reports.
4	**Set up tracking on your Facebook Ads**	Your Facebook ads cannot be tracked without proper UTM or Wicked IDs added as URL Parameters to your ads.

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You can do this manually, or, in many cases, Wicked Reports can do it for you automatically.

Every ad must have tracking applied for your Wicked Reports data to be most accurate and useful to you. Ads without tracking will not receive attribution.

> *URL shorteners and forwarders that strip UTMs *CANNOT* be tracked by Wicked Reports.*

5

Authorize your Google Analytics and Google Adwords accounts

Analytics and Adwords are using the same Google Authorization, so they must both be managed using the same email address. If they are not currently, you will need to invite the email address you are using to be an Admin on the account it's not currently on.

6

Set up tracking on your Adwords ads

UTMs for Adwords should be set up using the Tracking Template inside Google Adwords. This template will be set at the account-level. Our template will use specific values for the purposes of Wicked Reports tracking and will allow you to turn on Auto-Tagging for any existing tracking for which you use UTMs.

> *Any UTMs already set up at a lower level (i.e. Campaign, Ad Group, etc.) will overwrite the Account level tracking template and will keep Wicked Reports from tracking properly. You will want to remove any other tracking you have set up on your Adwords account.*

For more information, you can review our held article about [setting up your Tracking Template](#).

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7 Deploy your Wicked Reports Tracking Code on your website, landing pages, and order forms

Custom tracking code, which will be provided to you during your setup process, must be added to all landing pages, lead capture pages, order forms, and checkout pages.

This will be a Javascript snippet that you must be able to add, similar to how Google Analytics tracking code is added to your site and landing pages.

For specific instructions please review one of our help documents on [adding the code to your site, CRM, or shopping cart](#).

You may also need to work with your site host, landing page provider, or other vendors for specific instructions on integrating with their platforms.

In preparation of this step, we recommend putting together an inventory of all of your landing and checkout pages, along with anywhere a user might opt-in to your list, that can be referenced to make sure you get the tracking code applied everywhere across your entire marketing footprint.

Not having tracking applied will negatively impact revenue attribution and the quality of your Wicked Reports data.

> *Some Landing page tools such as LeadPages use popup optin forms loaded inside IFRAMEs. These IFRAME are separate URLs and require that the tracking code also be added to the popup form (lead box), not just the landing page.*

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8	**Provide us with the automated emails you'd like us to encode as part of your Kickstart package**	Email tracking is one of the cornerstones of Wicked Reports and knowing how to set up your Email tracking is critical to your success with Wicked Reports.

If you are using our ActiveCampaign integration this is not required because we have UTM-less click tracking and historical reporting for Active Campaign.

Otherwise, you'll need to apply tracking to every email link. For instructions, please review our help document on [setting up email tracking](#). |
| **9** | **Set up tracking on a social media post** | It's important to remember, this only matters if the link in your social post is taking readers to a property you own. If you are promoting someone else or simply linking to a blog post by someone else, there is no need to add tracking values to your social post (or you can use a [Wicked Redirect Link](#)).

For more information, you may review our help document on [how to setup tracking for your social media posts](#). |
| **10** | **Schedule your Setup Audit Call with our team** | Once you've got everything authorized and your tracking setup, you'll be invited to have a setup audit call with your Customer Success Rep, who will be assigned when your Wicked Reports account is created in our system.

On this call, your rep will look through your account for any problems, make suggestions, if necessary, for improving your tracking, and answer any initial questions you may have. |
| **11** | **Collect data** | Once you're up and running with Wicked Reports we'll start collecting data. We pull data from all authorized sources each night before we process everything and |

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update reporting. Data is processed nightly for every account.

Depending on your activity volume it could take anywhere from a couple days to a couple weeks to collect enough data to start making decisions.

You must complete these steps to ensure that Wicked Reports is set up properly. This list may look daunting but going through the steps should not take you long.

If you'd like a little extra hand-holding along the way, or just want someone to take care of all this for you, please **check out the additional setup services we have available**.

It is also IMPORTANT to know that you will not have access to the reports until you complete the WickedFast Setup.

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Interpret data

This where you'll really dig into Wicked Reports and start looking for trends and insights in your data. What you should keep doing, stop doing, or do more of. This is the core of Wicked Reports.

How do I know my data is accurate? What maintenance is required to keep my data health?

The quality of your reporting largely depends on completeness of your data. Making sure that you have tracking setup correctly for all your PPC ads, email links, landing pages, checkout pages, social media posts, and everywhere else is the most important thing you can do to ensure the quality and usefulness of your reports.

It's important to check in from time to time that make sure that as ads are updated and new campaigns and landing pages are created, that you retest and confirm your landing pages and ads are all tracked correctly.

If you'd like to have one of our data consulting experts assigned to be part of your team standing by to provide unlimited service, support, and analysis, you might be interested in our ongoing consulting services.

You may also want to install the Wicked Reports Chrome Extension to import your Wicked Reports data right into the native Facebook Ad Manager interface.

Remember, if you have any questions about the setup process, you can check out our Quickstart Guide in The Wicked Academy.

Welcome to Wicked Reports!

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