ADTECHLO

ACCOUNT ACCESS GUIDE

How to securely provide the access we need

to build, track and optimize your lead generation system.

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1. Why we need account access

To build and operate your lead generation system, Adtechlo may need access to selected advertising, website, analytics, CRM and communication accounts. The exact accounts depend on your campaign setup. We only request access that is relevant to the work being performed.

Security rule: never send passwords, recovery codes, credit-card details or two-factor authentication codes through the onboarding form, email or WhatsApp. Whenever possible, invite Adtechlo as a user, partner or administrator through the platform's official access-management system.

2. Access checklist

Depending on your campaign, we may request access to some or all of the following:

Platform / asset	Typical access needed	Purpose
Meta Business Portfolio	Partner or user access to relevant assets	Manage Facebook / Instagram advertising and tracking.
Facebook Page & Instagram	Business access	Connect campaign assets and lead destinations.
Meta Ad Account	Advertiser / campaign-management access	Create, launch and optimize campaigns.
Meta Pixel / Dataset	Access to the relevant data source	Measure conversions and campaign performance.
Google Ads	User or manager-account access	Create and optimize Google campaigns where applicable.
Google Analytics 4	Viewer / analyst / editor as required	Measure traffic, conversions and funnel performance.
Google Tag Manager	Publish or appropriate workspace access	Implement and maintain tracking tags.
Website / WordPress	Dedicated user account	Build or update landing pages, forms and tracking.
CRM / Lead System	User access with required permissions	Deliver leads and track sales outcomes.
WhatsApp / Messaging	Business integration access where required	Route or automate lead conversations.

3. Meta access

For Meta campaigns, Adtechlo may need access to your Business Portfolio, Facebook Page, Instagram account, ad account and the relevant Pixel / Dataset. Use Meta's business access or partner-access functions instead of sharing a personal Facebook login.

Recommended preparation

• Confirm that your Facebook Page and Instagram account are connected to the correct business.

• Confirm which Meta ad account should be used.

• Confirm that the correct Pixel / Dataset is associated with the website or funnel.

• Keep billing ownership under your business unless your signed agreement states otherwise.

4. Google access

If Google Ads is part of the campaign, we may request access to Google Ads, Google Analytics 4 and Google Tag Manager. Access should be granted to the specific Adtechlo account or manager account provided during onboarding.

Recommended preparation

• Confirm which Google Ads account belongs to the business.

• Confirm that GA4 is installed on the correct website.

• Confirm whether Google Tag Manager is already installed.

• Do not share your Google account password; use Google's user-access or manager-access functions.

5. Website and WordPress access

For landing-page, form or tracking work, Adtechlo may require access to your website. If WordPress is used, create a separate user for Adtechlo rather than sharing the owner's login.

Recommended	Avoid
Create a dedicated Adtechlo WordPress user.	Sharing the owner's personal password.
Grant only the permissions needed for the project.	Sending hosting master credentials unless absolutely necessary.
Remove or reduce access when the engagement ends.	Reusing the same password across multiple services.

6. CRM and lead-delivery access

Where a CRM or lead-management system is used, Adtechlo needs enough access to deliver leads, verify source attribution and review the sales status required for performance tracking. We do not need unrestricted access to unrelated customer data.

The client should confirm:

• Which CRM or lead system is the agreed source of truth.

• Where new Adtechlo leads should be created or delivered.

• Which pipeline stages correspond to New, Contacted, Qualified, Won and Lost.

• Which fields contain deal value and closing date.

• Who on the client's team is responsible for keeping outcomes updated.

7. Secure access rules

DO	DO NOT
Use official invitations, partner access and role-based permissions.	Send passwords through forms, email, chat or WhatsApp.
Use a dedicated business email for access where possible.	Send 2FA codes, backup codes or recovery codes.
Grant only the permissions required for the work.	Give access to unrelated financial or customer systems.
Review and revoke access when it is no longer needed.	Disable your own security controls to make access easier.

8. What to enter in the onboarding form

In the Access section of the Adtechlo onboarding form, provide account names, IDs, platform URLs and the contact person who can approve access. Do not enter passwords or security codes. After onboarding, Adtechlo can send the exact invitation details required for each platform.

Useful information includes:

• Meta Business Portfolio / Business ID, if known.

• Meta ad account name or ID.

• Facebook Page and Instagram account names.

• Google Ads Customer ID, if applicable.

• GA4 property and Google Tag Manager container, if applicable.

• Website / WordPress URL.

• CRM name and the person responsible for sales updates.

• Preferred email address for receiving access invitations.

9. Before campaign launch

Adtechlo will verify that the required accounts are accessible and that tracking can be tested. Campaigns should not be considered ready for launch until the necessary advertising assets, landing-page access and conversion tracking are confirmed.

ADTECHLO
Performance-based lead generation.

If you are unsure which permission to grant, do not send credentials. Contact Adtechlo and we will tell you exactly which account or role is required.