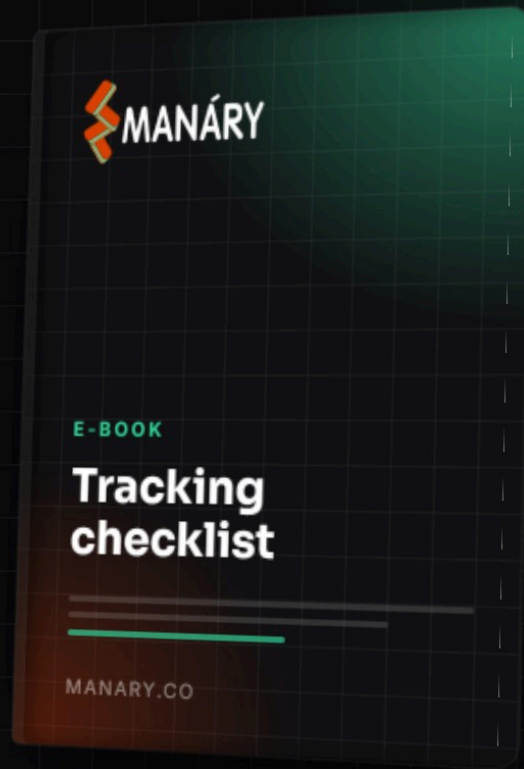


**E-BOOK**

E-book · 15 min read

Tracking checklist

The 24 points we check before launching any campaign. The same list we use internally.

- ✓ The 24 points, split into 6 blocks, with the reason behind each one
- ✓ An interactive checklist that saves your progress
- ✓ How to test each item in just a few minutes
- ✓ The mistakes that distort campaign numbers the most

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By Manary · Updated October 2026 · 15 min read

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This PDF is the version to keep and print. The interactive version is at manary.co/en/ebooks/tracking-checklist/

THE 30-SECOND SUMMARY

- There are 24 points in six blocks: access, GA4, Tag Manager, ad platforms, lead source, and privacy.
- Data that wasn't collected doesn't come back: a campaign running on broken tracking loses that information for good.
- The checklist is interactive and saves your progress in this browser. You can work through it in stages.

Before launching any campaign, Manáry runs through a checklist. It isn't red tape: it's what separates a campaign that learns from a campaign that burns budget. This material is that checklist, the same one we use internally, with the reason behind each item and the fastest way to check it.

You don't need to be technical to use it. Each point tells you what to check and where. The hands-on items (Tag Manager, Conversions API) are explained so you know what to ask of whoever manages your website or your media.

Why check before you advertise

Ad platforms learn from the events they receive. If a conversion is set up wrong, the algorithm learns the wrong thing, and it learns fast. Three situations come up all the time:

- **Conversions counted twice.** The lead event fires on the thank-you page and on the button click. The campaign looks twice as good as it really is, and budget goes where it shouldn't.
- **Conversions that don't exist.** The form was replaced, the event stopped firing, and nobody noticed. The platform starts optimizing for clicks, and cost per lead shoots up with no apparent explanation.
- **Leads with no source.** The campaign does generate contacts, but they reach the sales team with no information about where they came from. At the end of the month, nobody knows which campaign made the sale.

Fixing your tracking later doesn't recover what already happened. The data from the weeks with the problem stays wrong in your history for good.

How to use this checklist

1

Set aside 1 to 2 hours and get your access in order

You'll need to log in to Google Ads, Meta Business Manager, GA4, Google Tag Manager, and your CRM. If you don't have access to one of them, that's your first finding.

2

Follow the order of the blocks

The blocks go from the foundation to the details. There's no point reviewing the Conversions API if the Meta account isn't in the company's name.

3

Check off what's right, note what's missing

The checklist saves your check marks in this browser. Come back whenever you like and pick up where you left off.

4

Run the end-to-end test at the end

The last block ends with a real conversion. It's the only way to be sure everything is talking to each other.

The interactive checklist

0 of 24 items

1. FOUNDATION AND ACCESS

- ☐ Ad accounts, GA4, and Tag Manager in the company's name, with an internal admin
- ☐ Domain verified in Meta and site verified in Search Console
- ☐ Same time zone and currency across all accounts
- ☐ A list of who has access, each person at the right level

2. GA4

- ☐ GA4 on every page, loaded only once
- ☐ Internal and developer traffic filtered out
- ☐ Key events defined: lead, contact, and purchase
- ☐ Data retention set to 14 months and GA4 linked to Google Ads and Search Console

3. TAG MANAGER AND EVENTS

- ☐ Tag Manager published, with named versions and no forgotten tags
- ☐ Lead event fires only when the form is submitted successfully
- ☐ WhatsApp and phone clicks tracked as events
- ☐ Value and currency sent with lead and purchase events

4. AD PLATFORMS

- ☐ One primary conversion per goal in Google Ads, with no duplicates
- ☐ Auto-tagging (gclid) active and enhanced conversions turned on
- ☐ Meta pixel and Conversions API active, with deduplication
- ☐ Conversion windows reviewed for your sales cycle

5. LEAD SOURCE AND CRM

- ☐ UTM standard written down and used on every link
- ☐ Forms with hidden fields for UTMs, landing page, and gclid
- ☐ Leads reach the CRM with source and stage filled in
- ☐ Return path defined: sales and qualified leads flow back to the platforms

6. PRIVACY AND DATA QUALITY

- ☐ Cookie banner integrated with Google Consent Mode
- ☐ Privacy policy names the measurement and advertising tools
- ☐ End-to-end test done with a real conversion
- ☐ Someone checks conversions every week, with an alert for drops

Your check marks are saved only in this browser.

BLOCK 1

Foundation and access

1. Accounts in the company's name, with an internal admin

Why it matters: an account created in the agency's name, or a former employee's, is history the company can lose overnight. Years of conversion data stay locked inside it.

How to check: in each tool, see who the owner or primary admin is. It should be a company email address belonging to someone who's staying with the company. The agency comes in as a partner, not as the owner.

2. Domain verified in Meta and site in Search Console

Why it matters: domain verification in Meta is what lets you prioritize your website events, and it keeps third parties from using your domain in their ads. Search Console is your source of data on organic search and site health.

How to check: in Meta Business Manager, under Brand Safety, the domain should show as verified. In Search Console, the domain property should be active and have an admin from the company.

3. Same time zone and currency across all accounts

Why it matters: accounts in different time zones count the same day differently, and different currencies complicate any cost comparison. In many cases, an ad account's time zone can't be changed once it's been created.

How to check: look in the settings for Google Ads, the Meta ad account, and the GA4 property. They should all use the time zone and currency of the market where your business operates.

4. A list of who has access, each person at the right level

Why it matters: extra admin access is a risk of accidental changes (or of someone who left and can still log in). Missing access slows down every fix.

How to check: export or write down the users of each tool. Remove anyone who no longer works with the company, and give admin access only to the people who actually configure things.

BLOCK 2

GA4

5. GA4 on every page, loaded only once

Why it matters: a page without the tag is a visit that disappears; a duplicate tag (in the site's code and in Tag Manager, for example) doubles your page views and distorts engagement and conversion rates.

How to check: use Google's Tag Assistant and browse the site, including thank-you and checkout pages. A single GA4 tag with your ID should show up on each page.

6. Internal and developer traffic filtered out

Why it matters: your company's team and your agency's team visit the site all the time, including when they fill out test forms. Without a filter, those visits and conversions end up in your reports.

How to check: in GA4, under Admin, Data collection, see whether an internal traffic definition exists and whether the data filter is active (and not just in testing).

7. Key events defined: lead, contact, and purchase

Why it matters: these are the events that tell you whether the site is doing its job. If they aren't marked as key events, GA4 won't show conversion rate by channel and won't send anything useful to Google Ads.

How to check: under Admin, Key events, the form submission event, the WhatsApp or phone click event, and, in e-commerce, the purchase event should be marked. Don't mark generic events like page scroll as key events.

8. 14-month retention and integrations linked

Why it matters: by default, GA4 keeps detailed data for only 2 months, which prevents year-over-year comparisons in explorations. Linking it to Google Ads and Search Console brings media, organic search, and behavior together.

How to check: under Admin, Data retention, select 14 months. Under Product links, check Google Ads and Search Console.

BLOCK 3

Tag Manager and events

9. Tag Manager published and organized

Why it matters: unpublished changes don't apply to anyone, and a messy container makes every fix take three times as long. Named versions let you roll back when something breaks.

How to check: see whether the workspace has pending changes, whether the latest versions have a name and description, and whether there are paused tags or tags from tools the company no longer uses.

10. Lead event only when the form is submitted successfully

Why it matters: this is the most common mistake of all. If the event fires on the button click, it also counts people who clicked with an incomplete form or an error. The platform ends up optimizing for button clicks, not leads.

How to check: in Tag Manager's preview mode, click submit with a required field left empty. The lead event must not fire. Then submit the form correctly: it should fire exactly once.

11. WhatsApp and phone clicks tracked

Why it matters: in many businesses, most contacts come in through WhatsApp. Without this event, the report shows few leads and the campaign looks worse than it is.

How to check: click the WhatsApp button (the floating one and the ones in the middle of the page) with preview mode on, and check whether the event shows up in GA4's DebugView.

12. Value and currency in your events

Why it matters: without a value, the platform treats every conversion the same. With a value, it can prioritize what brings in more money, and you can calculate your return.

How to check: in e-commerce, the purchase event should carry the actual order value and the currency (USD, for example). In lead generation, use an estimated value per lead (for example, average deal size times close rate) until the real value comes in from the CRM.

BLOCK 4

Ad platforms

13. One primary conversion per goal in Google Ads

Why it matters: Google Ads optimizes for the conversions marked as primary. If a lead is counted by the Google Ads tag and also imported from GA4, with both set as primary, every lead counts twice.

How to check: under Goals, Conversions, see which actions are set as primary. For each goal (lead, purchase) there should be only one. The rest stay secondary, for observation only.

14. Auto-tagging and enhanced conversions

Why it matters: auto-tagging adds the click identifier (gclid) to your links, which lets you tie the click to the lead and import sales later. Enhanced conversions use data such as email addresses, in encrypted form, to recover conversions the cookie missed.

How to check: in Account settings, auto-tagging should be on. In the conversion settings, check that enhanced conversions are turned on and that the diagnostics show no errors.

15. Meta pixel and Conversions API, with deduplication

Why it matters: the browser pixel loses some events to ad blockers and cookie restrictions. The Conversions API sends the same events from the server. Without deduplication, every conversion counts twice.

How to check: in Events Manager, your main events should show as received from both the browser and the server, with a note that they're being deduplicated. Event match quality should be good.

16. Conversion windows that fit your sales cycle

Why it matters: the window sets how many days after the click a conversion can still be credited to the ad. A window that's too short for a product with a long decision process makes the campaign look weak.

How to check: compare the configured window with the average time between the first click and the conversion. For leads in consultative sales, longer windows tend to reflect reality better.

Stuck on a technical item?

Setting up Tag Manager, enhanced conversions, and the Conversions API is routine in Manáry's media onboarding.

[Ask for help](#)

BLOCK 5

Lead source and CRM

17. UTM standard written down and used on every link

Why it matters: "facebook," "Facebook," and "fb" become three different sources in your report. Without a standard, the numbers by channel never add up.

How to check: export last month's sources and mediums from GA4. If you see variations of the same channel, you're missing a standard. Write down the convention (lowercase, no accents, words separated by hyphens) and use a link builder.

18. Forms with hidden source fields

Why it matters: they're what carry the click's source all the way to the CRM. Without them, the lead reaches sales with no history.

How to check: open the site with a link that has UTMs, fill out the form, and see whether the record came in with utm_source, utm_medium, utm_campaign, landing page, and gclid filled in.

19. Leads reach the CRM with source and stage

Why it matters: this is where the math that runs all the way to revenue begins. A lead outside the CRM, or in the CRM with no source, doesn't make it into any analysis.

How to check: pull the last 20 leads from the CRM. Every one of them should have a source filled in and sit in a pipeline stage. WhatsApp and phone leads included.

20. Return path defined

Why it matters: platforms only learn to find people who buy if they know who bought. That means sending qualified leads and sales back to them.

How to check: see whether there's an offline conversion import in Google Ads and whether CRM events are being sent through Meta's Conversions API. If neither exists yet, the item counts as done once there's an owner and a date for it.

Privacy and data quality

21. Cookie banner integrated with Consent Mode

Why it matters: privacy laws such as GDPR and LGPD require transparency and respect for the visitor's choice. When it's integrated with Google Consent Mode, the banner makes your tags respect that choice, and the platforms can estimate conversions from people who declined cookies.

How to check: decline cookies in the banner and see, in Tag Assistant, whether the consent state changes to denied. Accept them and see whether it changes to granted.

22. Up-to-date privacy policy

Why it matters: the policy should state what data the site collects, what it's used for, and which tools collect it (GA4, Google Ads, Meta, CRM). It's a legal requirement and a platform requirement too.

How to check: read the policy with the list of tools in your Tag Manager next to it. Every tool that collects data should be mentioned.

23. End-to-end test with a real conversion

Why it matters: every piece can work on its own while the whole setup fails. Only a real conversion shows whether the data reaches GA4, the platforms, and the CRM.

How to check: follow the step-by-step in the next chapter.

24. Someone checks conversions every week

Why it matters: tracking breaks. A site update, a replaced form, a new plugin. The sooner someone notices, the less data you lose.

How to check: assign an owner and set up a simple alert: if a day's conversions drop sharply compared with the average, someone gets notified. GA4 lets you create custom alerts; a weekly spreadsheet works too.

How to test everything in 15 minutes

1 Open the site with a campaign link

Use a link with test UTMs (for example, `utm_source=test` and `utm_campaign=checklist`) in an incognito window.

2 Turn on Tag Manager's preview mode

Browse like a visitor would: the home page, an inner page, the form.

3 Submit a real form

Check in preview mode that the lead event fired exactly once, with the right parameters.

4 Watch the event arrive in GA4

In DebugView, the event should show up within seconds, marked as a key event.

5 Check Meta

In the Test events tab of Events Manager, the lead should arrive from both the browser and the server, deduplicated.

6 Check the CRM

The record should be there with the name, contact details, the test UTMs, the landing page, and the initial stage.

7 Delete the test

Remove the test lead from the CRM and write down the date of the test. Repeat it after every change to the site.

The mistakes that distort the numbers most

Lead counted on the button click

WHAT IT CAUSES

Inflated conversions and misguided optimization

FIX

Fire only on a successful submission

Two primary conversions for the same lead

WHAT IT CAUSES

Every lead counts twice in Google Ads

FIX

One primary, the rest secondary

Pixel and API without deduplication

WHAT IT CAUSES

Double-counted conversions in Meta

FIX

The same event ID in both

WhatsApp not tracked

WHAT IT CAUSES

Campaigns look worse than they are

FIX

Click event and source in the message

UTMs with no standard

WHAT IT CAUSES

The same channel repeated under different names

FIX

A written convention and a link builder

Form replaced without reviewing events

WHAT IT CAUSES

Conversions drop to zero and nobody notices

FIX

End-to-end test after every change

Frequently asked questions

Do I need Tag Manager if the tags are already in the site's code?

It isn't mandatory, but it makes things much easier. With Tag Manager, whoever handles measurement can change events without touching the site's code, and with a version history. Just don't keep both for the same tag, or you'll double-count.

Is Meta's Conversions API really necessary?

If you invest a meaningful amount in Meta, yes. It recovers some of the events the pixel loses and improves the quality of the data the platform uses to optimize.

How often should I redo the checklist?

The full checklist, every quarter or after any major change to the site. The end-to-end test, after every change to a form, thank-you page, or checkout.

My site runs on WordPress. Does anything change?

The points are the same. Watch out for plugins that insert the GA4 tag on their own (a common cause of duplication) and for form plugins that don't fire a success event unless you configure them.

Want us to run this audit for you?

Manáry checks all 24 points, fixes what's missing, and hands over measurement that's ready for your first campaign.

[Talk to Manáry](#)



NEXT STEP

Want us to apply this to your business?

This material is what Manary does every day with clients. If it makes sense, a specialist looks at your numbers and hands back the priorities, with no sales pitch.

[Get my diagnostic](#)

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