

AM - Manage ENT On-Boarding Projects Launch

15 Steps [View most recent version on Tango.ai](#) 

Created by

Creation Date

Last Updated

Logical Position

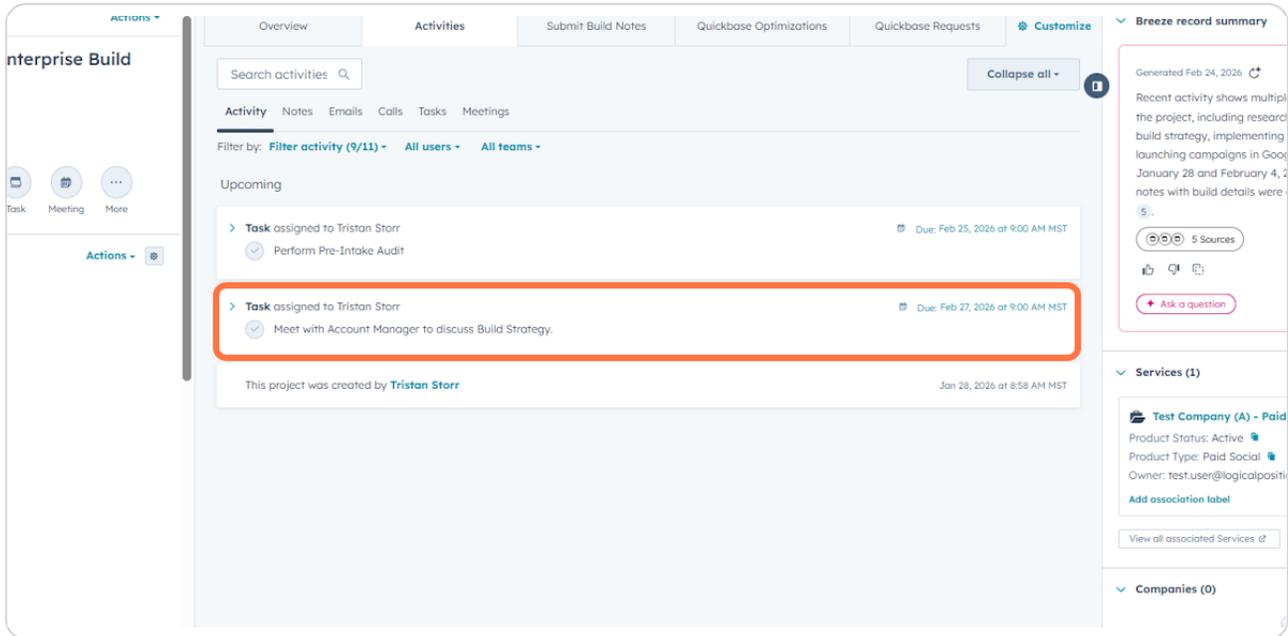
Feb 24, 2026

Feb 25, 2026

STEP 1

After Completing Post-Intake Meeting, PSS will mark "Meet With AM" Task As Completed

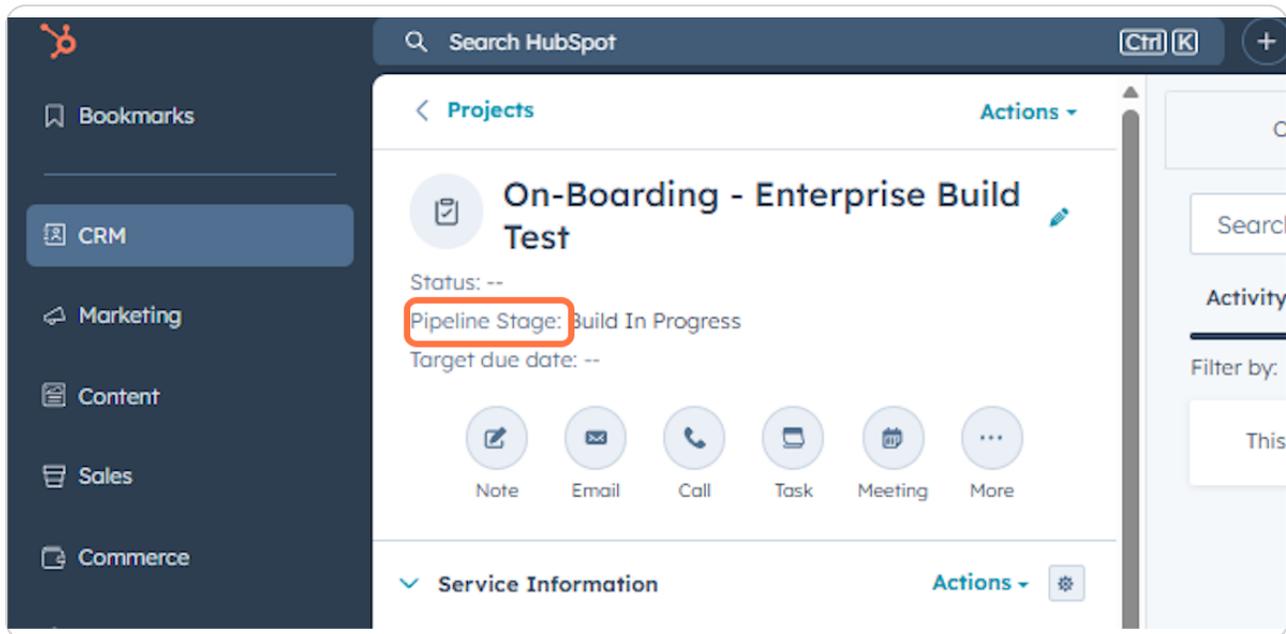
The PSS completing this task moves the Project into "Build In Progress"



STEP 2

On-Boarding Project Should Moves Build In Progress Stage

After the Intake is complete and the AM has met with the Specialist so that they can begin building, the Build In Progress stage will generate several new tasks. Most will be assigned to the Specialist for the Build Milestones, but a few will be assigned to the AM to manage during the build and launch period.



STEP 3

Staged Build Status on Project moves to "Build Stage 1"

Staged Build Status field in the On-Boarding Information section of the project indicates where in the ENT Build Process the Specialist is.

The screenshot shows a project dashboard with a sidebar on the left containing navigation items: Commerce, Service, Data Management, Automation, Reporting, Breeze, Development, and Partner. The main content area is titled "On-Boarding Information" and includes a date "Date exited 'Build Review (Paid Media Operations - On-Boarding)' 01/28/2026 9:19 AM MST". Below this, the "Staged Build Status" is highlighted with a red box and set to "BUILD STAGE 1". Other fields include "Target due date", "Client Quoted Date", "User Launching Social Campaigns", "Time in current stage" (3 minutes), and cumulative times for various stages. On the right, a list of tasks is shown, including "Perform Pre-Intake Audit", "Meet with Account Manager to discuss Build Strat", and "Send Data Feed Audit to Client". A note at the bottom states "This project was created by Tristan Storr".

STEP 4

New AM Tasks For Build Are Generated

During the first Build Stage, tasks are generated for the AM. The number can be variable, based on product mix, but include tasks like "Ensure Action Items For Launch Are Complete" and "Sharing Data Feed Audit With Client".

The screenshot shows a task list with three items. The first item is "Meet with Account Manager to discuss Build Strategy" with a green checkmark. The second item is "Manual email assigned to test.user@logicalposition.com" with a sub-task "Send Data Feed Audit to Client" and a due date of "Feb 27, 2026 at 9:00 AM MST". The third item is "Task assigned to test.user@logicalposition.com" with a sub-task "Ensure Outstanding PPC Action Items For Launch Are Completed" and a due date of "Mar 3, 2026 at 9:00 AM MST". A red box highlights the second and third items.

STEP 5

Specialist Completes Campaign Set and Submits For Review

Once the PSS is done with their first set of campaigns, they will undergo the Build Review Process using the Build Review Status field. Project Stage moves to Build Review.

The screenshot shows a software interface with a dark sidebar on the left containing navigation items: Automation, Reporting, Breeze, Development, and Partner. The main content area is divided into sections. The top section is 'Build Review', which includes a 'Build Reviewer' field with the name 'Testy McTesturface' and a 'Build Review Status' dropdown menu. The dropdown menu is open, showing the selected option 'BUILD SUBMITTED FOR REVIEW' highlighted with a red box. Below this, there are two date fields: 'Date entered "Build Review (Paid Media Operations - On-Boarding)"' and 'Date exited "Build Review (Paid Media Operations - On-Boarding)"', both showing the date '01/28/2026 9:19 AM MST'. The bottom section is 'On-Boarding Information', which includes a 'Target due date' field. On the right side of the interface, there is a list of tasks, each with a green checkmark icon and a description: 'Task assigned to Tristan Storr' with sub-task 'Meet with Account Manager to discuss Build Strat', 'Manual email assigned to test.user@logicalposition.co' with sub-task 'Send Data Feed Audit to Client', 'Task assigned to Tristan Storr' with sub-task 'Audit & Confirm Account Settings', 'Task assigned to test.user@logicalposition.com' with sub-task 'Ensure Outstanding PPC Action Items For Launch', and 'Task assigned to Tristan Storr' with sub-task 'Research & Plan Ecommerce Build Strategy'.

STEP 6

Specialist Team Lead Approves Build

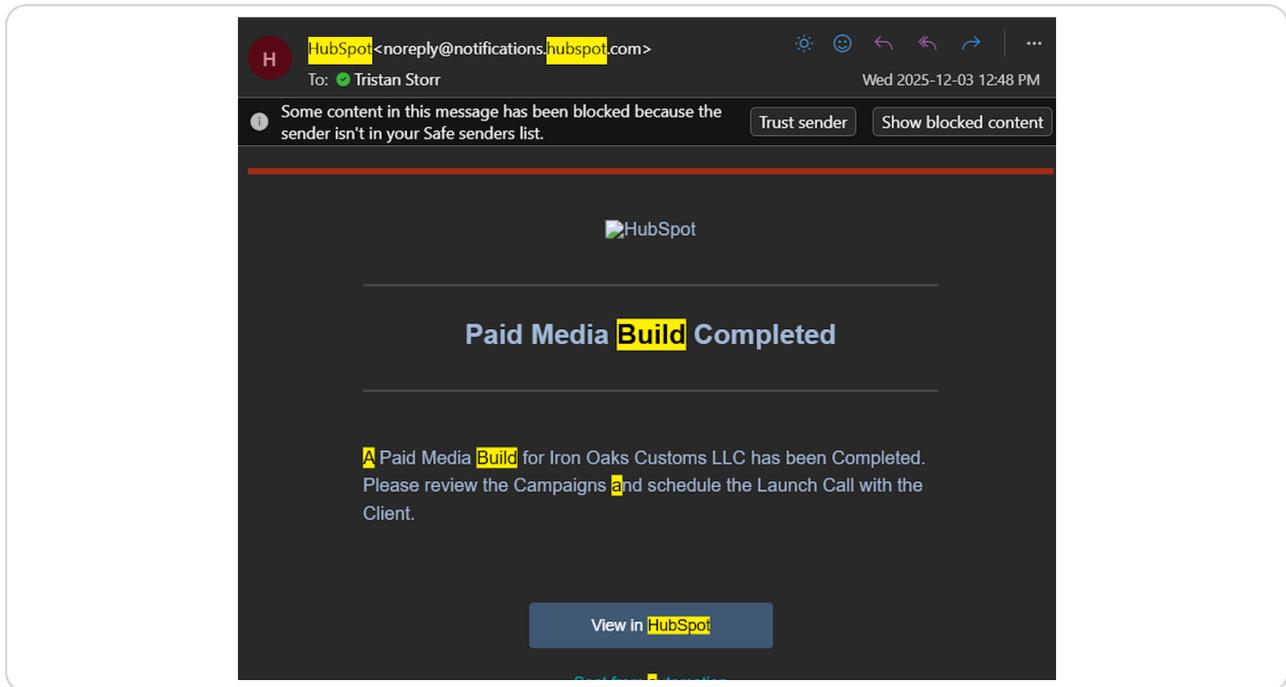
The Build Review process ends when the PSS Team Lead moves the Build Review Status field to an Approved status. This changes the Project stage to Build Completed.

The screenshot shows the same software interface as in Step 5. The 'Build Review Status' dropdown menu is now open, showing the selected option 'NO FURTHER CHANGES OR SUGGESTIONS (APPROVED)' highlighted with a red box. The date fields and the 'On-Boarding Information' section remain the same. The list of tasks on the right side of the interface is also the same as in Step 5.

STEP 7

AM Receives Email Notification of Campaign Set Completion

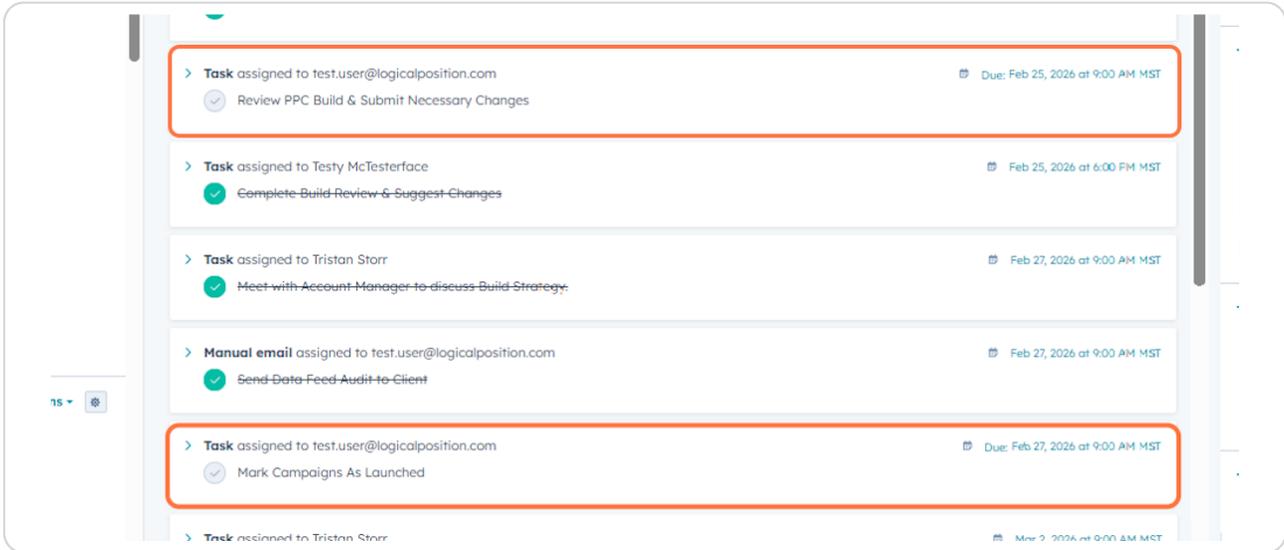
Via Email, an AM will receive a notification that a Campaign Set has been completed once the Project stage hits Build Completed.



STEP 8

AM Gets Two Launch Tasks Post-Build

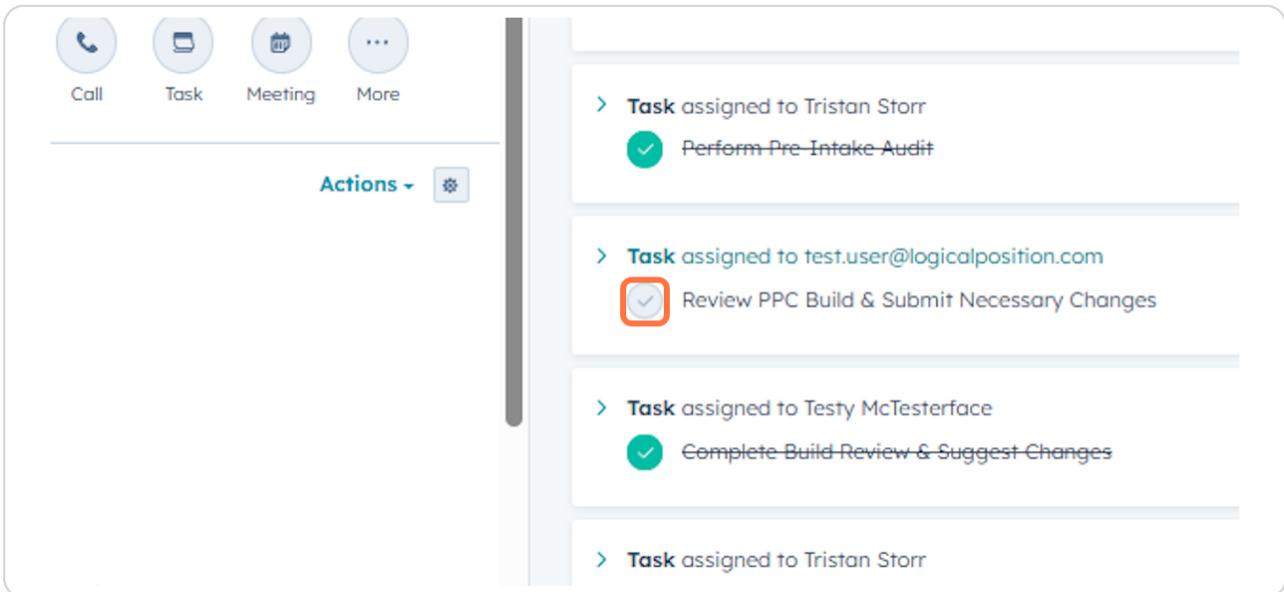
AM is assigned to two new post-build tasks: Review Build & Submit Changes and Mark Campaigns As Launched.



STEP 9

AM Reviews Campaigns For Accuracy Pre-Launch

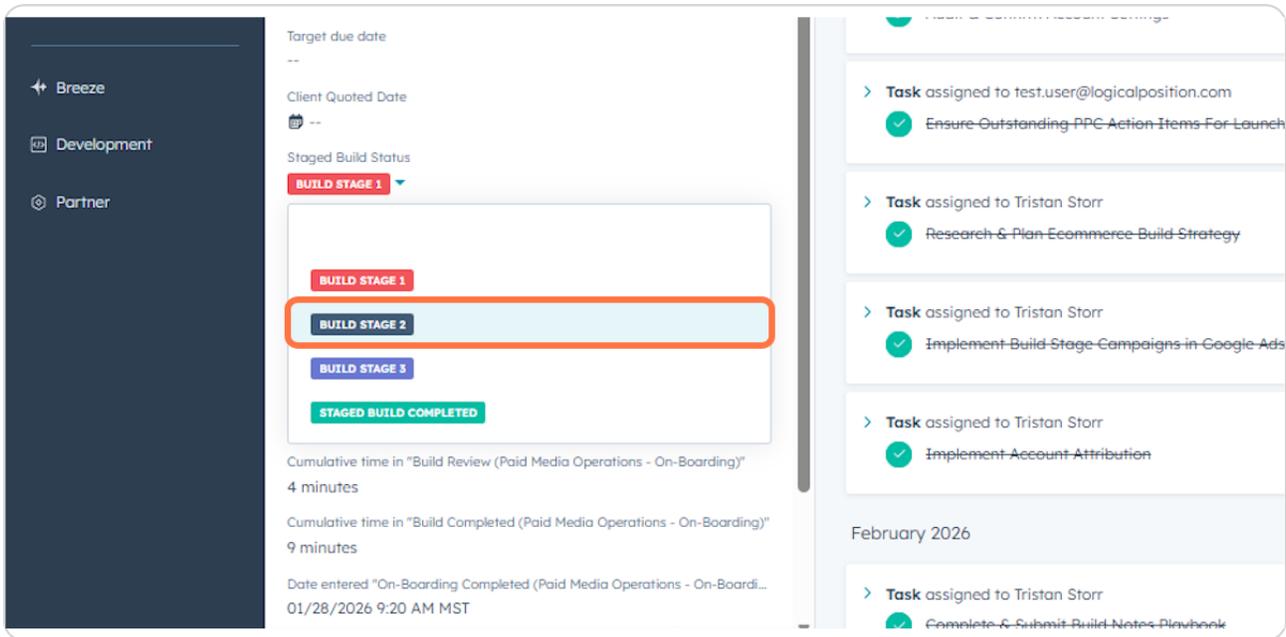
AM reviews the campaign set the PSS build and coordinates with them for any changes to be made prior to launching.



STEP 10

Specialist Moves To The Next Build Stage

Once the PSS is ready to move to the next Build Stage, they will manually update the Staged Build Status field on the Project to Build Stage 2.



The screenshot displays a project management interface. On the left, a dark sidebar contains navigation options: Breeze, Development, and Partner. The main content area shows project details: Target due date (---), Client Quoted Date (---), and Staged Build Status (BUILD STAGE 1). A dropdown menu for 'Staged Build Status' is open, showing options: BUILD STAGE 1 (selected), BUILD STAGE 2 (highlighted with an orange box), BUILD STAGE 3, and STAGED BUILD COMPLETED. Below this, cumulative time for 'Build Review (Paid Media Operations - On-Boarding)' is 4 minutes, and for 'Build Completed (Paid Media Operations - On-Boarding)' is 9 minutes. The date entered for 'On-Boarding Completed' is 01/28/2026 9:20 AM MST. On the right, a task list shows several completed tasks with green checkmarks: 'Ensure Outstanding PPC Action Items For Launch', 'Research & Plan Ecommerce Build Strategy', 'Implement Build Stage Campaigns in Google Ads', and 'Implement Account Attribution'. A calendar view for February 2026 is visible, with a task 'Complete & Submit Build Notes Playbook' assigned to Tristan Storr.

STEP 11

AM Performs Launch With Client

Once the AM has completed the scheduled launch call with the client, they will go through the process of marking the account as launched. This is the same action as marking Week 0 as complete in Quickbase.

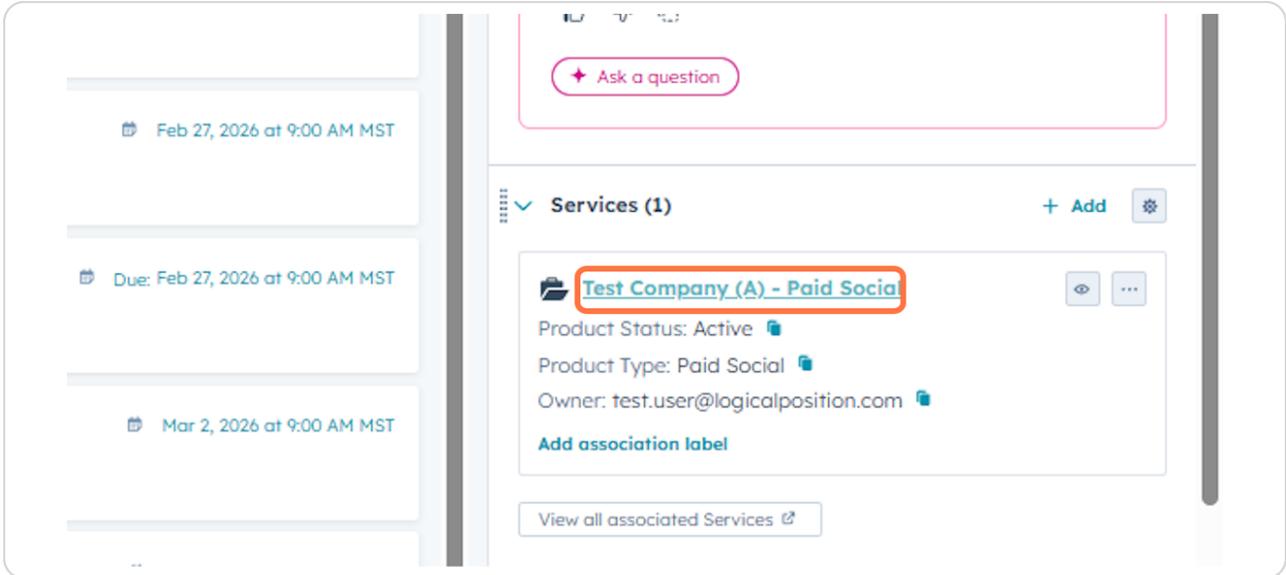


The screenshot shows a task completion notification. The task is 'Mark Campaigns As Launched', assigned to test.user@logicalposition.com. It has a green checkmark icon and a due date of Feb 27, 2026 at 9:00 AM MST. The notification is highlighted with an orange border.

STEP 12

AM Navigates To The Service

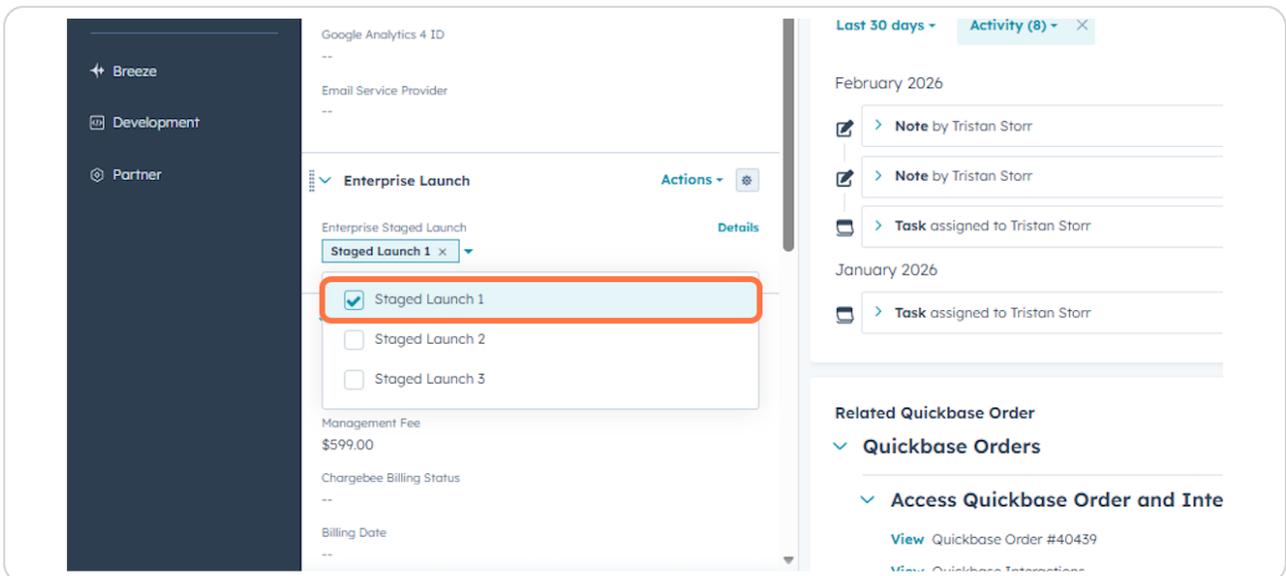
To mark the launch as complete for the first campaign set, the AM goes to the Service of the record of the subscription they just launched.



STEP 13

AM Updates "Enterprise Staged Launch" Property

In the left-column of the record, in the Enterprise Launch property, the AM selects "Staged Launch 1" from the dropdown. This indicates that the first campaign set has been launched.



STEP 14

Optimization Project Generated

The action of updating the Enterprise Staged Launch property from *null* to Staged Launch 1 tells the Service to generate a new Optimization project for the Specialist. This is where the Specialist will perform their routine optimizations moving forward.

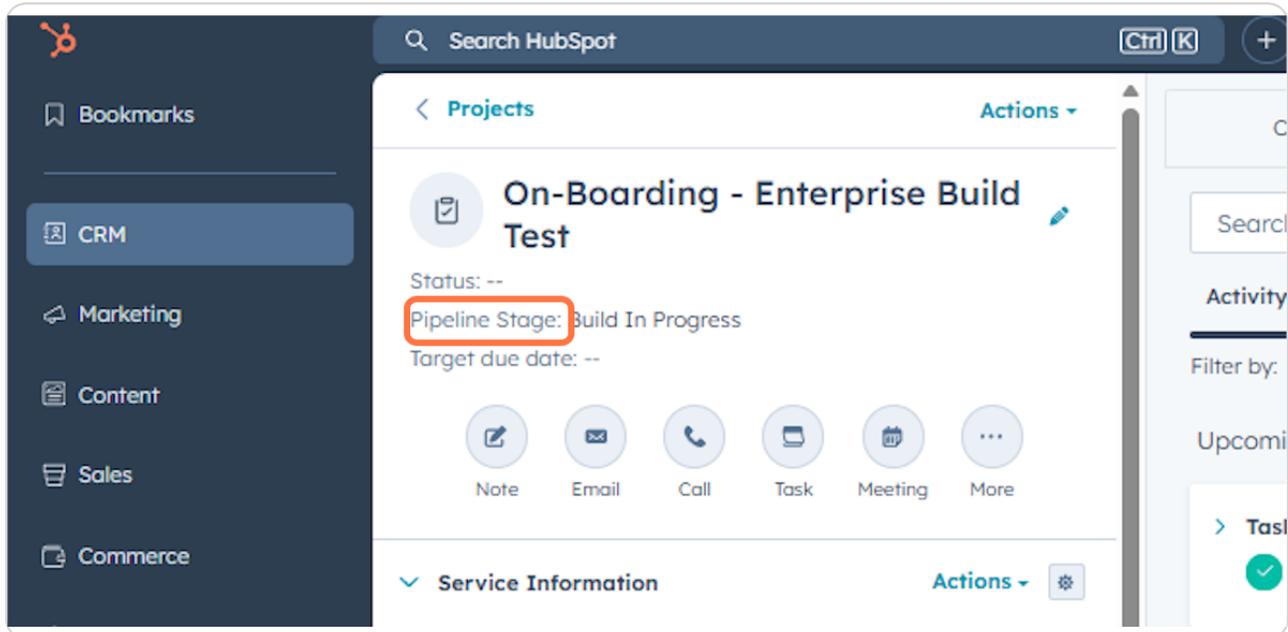
The screenshot displays a project management interface with a list of optimization projects on the right and a sidebar on the left. The sidebar contains a section for '- Weekly Optimizations' with a date of 'Feb 25, 2026 at 6:00 PM MST' and a 'Collapse all' button. The main list of projects includes:

- On-Boarding - Enterprise Build Test**
Last activity date: 02/24/2026 12:55 PM MST
Pipeline Stage: Build In Progress (Paid Media Operatio...
Next activity date: 02/27/2026 9:00 AM MST
Add association label
- Optimization - TEST ACCOUNT** (highlighted with a red box)
Last activity date: 02/09/2026 2:05 PM MST
Pipeline Stage: Daily Optimization (Paid Media Operati...
Next activity date: --
Add association label
- On-Boarding - Test Account**
Last activity date: 02/09/2026 9:00 AM MST
Pipeline Stage: On-Boarding Completed (Paid Media O...
View all associated Projects

STEP 15

On-Boarding Project Stage Moves Back To Build In Progress

The On-Boarding Project moves back to Build In Progress as the Specialist starts building out the next campaign set for the client. The process above will repeat for each Campaign Set. AMs will continue to receive Email notifications when a Campaign Set is completed and reviewed. Subsequent tasks for reviewing campaigns and marking campaign set as launched on the Service will also generate.



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