DataDive Account Setup Guide

Version: 1.0 **Last Updated:** 2026-01-21 **Presenter:** Bryant Mangum (Data Dive) **Source:** Account Setup Onboarding Video **Purpose:** Setting up Data Dive from scratch

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1. Initial Login

Authentication Process

Data Dive uses Gmail authentication:

Step 1: Have Gmail Ready - Ensure you have a Gmail account - This is required for authentication

Step 2: Login to Data Dive - Go to Data Dive login page - Click sign in with Google - Authorize requested permissions

Permissions Requested

Data Dive requests access for: - Account authentication - Excel file integration (optional) - Data synchronization

> *"It's going to ask for some access because you can use this in a way where it will actually pull over some duplicates into your Excel files if you want to do that."*

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2. Account Overview

Fresh Account View

When first logging in with no data: - Pipeline will be empty - Rank Radar will be empty - Reports section available - Setup prompts displayed

> *"Don't worry if it looks like this and you're getting some indications and some warnings."*

Initial Recommendations

1. Book a one-on-one call for expedited setup
2. Do your first dive in Amazon section
3. Set up Amazon connections early

Account Information Section

Access via: **Account** menu

Contains: - Personal information - Subscription details - Connection settings - Team management

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3. Navigation Overview

Main Menu Items

Section	Purpose
Pipeline	View all your dives and products
Amazon	Launch dives and research
Rank Radar	Keyword tracking dashboard
Reports	PPC and performance reports
Help Center	Documentation and support
Account	Settings and management

Pipeline

- Shows all products you're tracking
- Organizes by spaces
- Status indicators
- Quick access to dives

Amazon Section

- Launch new dives
- Research keywords
- Analyze competitors
- Access Listing Builder

Rank Radar

- Keyword position tracking
- Historical data
- Heat maps

- Performance views

Reports

- PPC performance reports
- Keyword reports
- Custom report generation

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4. Subscription Management

Accessing Subscription Settings

Navigate to: **Account** > **Subscription**

What You Can Customize

Feature	Description
Dives	Number of dives you can run
ASINs	Number of products to track
Rank Radar	Keyword tracking limits
AI Product Briefs	AI-generated brief limits

Flexible Scaling

> *"Depending on what plan you're on, you can go through these toggles based on your usage. You can totally customize this to whatever your brand needs or whatever your agency needs."*

Large Catalog Example

> *"There's an account we're working on right now, they have dozens, well they're actually going to have hundreds of products. So depending on your usage, you can actually slide these toggles."*

Inner Circle Discount

> *"Make sure that you get into the inner circle - that's gonna give you a significant discount."*

Adjusting Your Plan

You can: - Self-service adjust limits - No need to contact support - Changes apply immediately - Pay for what you need

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5. Usage Dashboard

What It Tracks

- Who is using the account
- What activities are being performed
- Resource consumption
- Dive and tracking usage

Team Activity Monitoring

> *"It will show you who's working on it, what kind of activities they're doing. If somebody's doing a lot of dives and tracking a lot of keywords, you can make sure that's appropriate for their role."*

Benefits

- Accountability for team members
- Track against plan limits
- Identify usage patterns
- Budget planning

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6. Amazon Connections

Setting Up Connection

Navigate to: **Account** > **Amazon**

Connection Methods

Method 1: Generate Link - Create shareable connection link - Send to team members - They complete authentication

Method 2: Direct Connection - Be logged into Seller Central - Click connect in Data Dive - Authorize access - Automatic redirect

> *"The easiest thing is just to set up this and go to your connection. You'll just set up your Seller Central and then it will automatically do those connections."*

Multi-Brand Accounts

For agencies/aggregators with multiple brands: 1. Log into Seller Central 2. Use dropdown in top left 3. Select specific brand to connect 4. Complete authentication for that brand

Data Available After Connection

- SIS Reports (Search Impression Share)
- SQP Data (Search Query Performance)
- PPC campaign data
- Conversion metrics

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7. Team Management

Adding Team Members

Navigate to: **Account** > **Team**

Step 1: Enter Email - Add team member's email address - Must be Gmail for authentication

Step 2: Set Access Level

Role	Access
Admin	Full visibility to everything
Billing	Financial access only
Team Member	Only assigned items

> *"If they're an admin they're gonna see everything. If they're not an admin or billing they're only gonna see what they're assigned."*

Access Control Best Practices

- Give minimum necessary access
- Use team member level for VAs
- Admin only for owners/managers
- Billing for finance team

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8. Spaces Configuration

What are Spaces?

Organizational containers for: - Brands - Product categories - Client accounts - Project groups

Setting Up Spaces

Navigate to: **Account** > **Spaces**

Step 1: Add Space - Click "Add Space" - Name appropriately - Set permissions

Recommended Space Structure

For Single Brand:

```
- Brand Name
  - Category 1
```

```
  - Category 2
  - Research/Prospecting
```

For Agency/Aggregator:

```
 - Client A
- Client B
- Client C
- Internal Research
```

Enterprise Considerations

> *"We'll get into depth of how to set this up especially for enterprise and bigger accounts."*

Space Access

Team members can be assigned to specific spaces: - Limits visibility - Organizes work - Maintains confidentiality

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9. Labels & Workflows

Setting Up Labels

Navigate to: **Account** > **Labels**

Recommended Labels

Label	Purpose
Pre-Launch	Research phase products
Launch	Active launch campaigns
Optimization	Ongoing optimization
Maintenance	Stable products
Review	Needs attention

Workflow Benefits

- Track product lifecycle stages
- Filter pipeline by status
- Team coordination
- Progress tracking

> *"You can go through here and add different workflows. You can put like pre-launch, launch, some different things in here."*

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10. Excel Integration

What It Does

- Export data to Excel
- Sync with spreadsheets
- Download reports

Setting Up

Navigate to: **Account** > **Excel Sheets**

> *"This is gonna be those Excel sheets if you want those cause some people still like these versions."*

Use Cases

- Offline analysis
- Custom reporting
- Data backup
- Team sharing

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11. Getting Started Next Steps

Immediate Actions

Step 1: Complete Account Setup - [ ] Verify Gmail authentication - [ ] Review subscription tier - [ ] Adjust limits if needed

Step 2: Connect Amazon - [ ] Log into Seller Central first - [ ] Complete Data Dive connection - [ ] Verify data syncing

Step 3: Create First Space - [ ] Name appropriately - [ ] Set permissions - [ ] Add initial labels

Step 4: Do First Dive - [ ] Go to Amazon section - [ ] Select a product/keyword - [ ] Run your first dive - [ ] Review MKL output

Recommended Learning Path

1. **Watch Account Setup Video** (this content)
2. **Do first dive** (next video in series)
3. **Learn Rank Radar** (setup and interpretation)
4. **Master Troubleshooting** (diagnostics)
5. **Advanced Optimization** (listing builder, PPC integration)

Support Options

One-on-One Demo: > "Book a one on one call. That's gonna help expedite getting through the process. We could invest a couple calls with you to make sure that you understand how to navigate this."

Help Center: - Documentation - FAQs - Tutorials - Contact support

Website: Go to datadive.tools for: - Demo booking - Audit scheduling - Additional resources

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Quick Reference: Account Sections

Section	Path	Purpose
Subscription	Account > Subscription	Manage plan limits
Usage	Account > Usage	Monitor consumption
Amazon	Account > Amazon	Connect Seller Central
Team	Account > Team	Add/manage members
Spaces	Account > Spaces	Organize brands/projects
Labels	Account > Labels	Workflow tracking
Excel	Account > Excel Sheets	Export integration

Appendix: Video Source Reference

Video Title: DataDive Account Setup **Presenter:** Bryant Mangum **Source:** https://www.youtube.com/watch?v=7L3Dm-nqJAY

Generated from DataDive Training Video Transcript