How To Set Up Facebook Business Manager

1. Enable Two Factor Authentication for your FB profile

To turn on or manage two-factor authentication:Go to your Security and login settings in your FB profile.

1. Scroll down to Use two-factor authentication and click Edit.
2. Choose the security method that you want to add and follow the on-screen instructions.

2. Create a Business Manager

Business Manager is a Facebook tool that helps you organize and manage your business.

You need a Facebook profile to create a Business Manager account. Use your FB username and password to sign in to Business Manager. It's a more secure way to log in than with just an email address and password.

Note: You can only create two Business Manager accounts. If you need more, please work with someone else in your organization to create additional Business Manager accounts.

Before you begin:
Facebook may ask you to confirm your identity before you can start running ads. Make sure you've got the right ID's to prove your identity.

To create a Business Manager:

1. Go to business.facebook.com/overview.
2. Click Create account.
3. Enter a name for your business, your name and work email address and click Next.
4. Enter your business details and click Submit.

Additional Steps

Turn on two-factor authentication for all employees your Business Manager

Only Business Manager admins can turn on two-factor authentication.

To turn on two-factor authentication:

1. Go to Business settings.
2. Go to Business info and click Edit.
3. Below Two-factor authentication, choose Required for everyone or Required for admins only. To turn off two-factor authentication, choose Not required.
4. Click Save.

Add a backup admin that can help you in case you get locked out of your account (Important)

1. Go to Business Settings then Security Centre
2. Click " Add" under the Backup Admin

Set up your payment method:

1. Go to your Business Settings.
2. Find Payment Methods.
3. Click Add Payment Method.

Add your Page to Business Manager

1. Go to Business settings. It looks like a gear icon in your sidebar.
2. In the Business assets section, click Accounts. Then, click Pages.
3. Click Add in the drop-down menu.
4. Select Add a Page.
5. Enter the Facebook Page name or URL.
6. Click Add Page. You should see your Page on the next screen. From here, you can add people to manage this Page.

Add/Create an ad account in Business Manager

1. Go to Business settings.
2. Click Accounts from the menu on the left-hand side. Then, click Ad accounts.

3. Click the blue Add drop-down menu.
4. Choose one of the three options: Add an ad account, Request access to an ad account or Create a new ad account.
5. If you choose to request access or add an ad account, enter the ad account ID. Learn where to find the account ID.
6. Follow the prompts to select people and access levels.

Note:
Don't forget to verify your email address.

Go to Business Settings.

1. Click Business Info.
2. Below My Info, click edit.
3. Make your changes.
4. Click Save.

We'll send you a confirmation email to verify your changes. In the email, select Confirm Now. If you don't see your confirmation email in your inbox, check your spam folder.

Add people to your Business Manager

To give people access to your business:

1. Go to Business Settings.
2. Click People.
3. Click + Add.
4. Enter the work email address of the person you want to add.
5. Select the role you'd like to assign them. Be sure to read the description for each role. Choose either Employee access or Admin access. You can also select Show Advanced Options to choose Finance analyst or Finance editor.
6. Click Next.
7. Choose a type of asset in the first column, then select the individual assets you want to add this person to in the second column. In the third column, toggle on each task you'd like to grant them. Or, toggle on admin access to allow them to manage the asset and

perform all available tasks. You can add people to multiple assets on this screen by repeating this step.

8. Click Invite.

3. Create and Install a Facebook Pixel

How the Facebook pixel works

When someone visits your website and takes an action (for example, buy something), the Facebook pixel is triggered and reports this action. This way, you'll know when a customer took an action after seeing your Facebook ad. You'll also be able to reach this customer again by using a Custom Audience.

When more and more conversions happen on your website, Facebook gets better at delivering your ads to people who are more likely to take certain actions. This is called conversion optimization.

Learn how to create and install a Facebook Pixel on your website
https://www.facebook.com/business/help/952192354843755

https://www.facebook.com/business/help/218844828315224

4. Set up Facebook Conversions API on your website

Facebook recommends that you use CAPI alongside your pixel to improve the quality of the data that’s being sent from your site to Facebook. This ensures that the events are passed back to Facebook directly from the server—not just from the browser-side (pixel).

As more users install ad blockers and opt-out of tracking, the data being passed on the browser-side (pixel) will diminish. Integrating Facebook CAPI to your website is a must as users currently don’t have a way to block data that is passed on the server-side.

Learn how to implement CAPI via each of these website hosting platforms here:
https://www.foxwelldigital.com/blog/2020/10/7/facebooks-conversions-api-capi-and-how-to-implement-it-with-your-shopify-site

https://www.facebook.com/business/help/260370078559247

https://developers.facebook.com/docs/marketing-api/conversions-api/

https://developers.facebook.com/docs/marketing-api/conversions-api/set-up-conversions-api-as-a-platform/

5. Export your most recent customer list

If you've never ran FB ads for your business before, you won't have much data to work with yet. We recommend that you export and prepare your customer list in advance. You're going to use this customer list as a target audience when you eventually start running ads.

The information in your customer list is known as an "identifier" (such as an email, phone number, address) and Facebook uses it to help you find the audiences that you want your ads to reach. See the identifiers accepted by Facebook here:
https://www.facebook.com/business/help/2082575038703844?id=2469097953376494

Your customer list can either be a CSV or TXT file that includes these identifiers.

Next steps:

1. Add your customer list: You can create your Custom Audience in Ads Manager. Once in your account, go directly to Audiences, then go to Create audience > Custom Audience > Customer list.
2. Prepare your customer list: Select the identifiers to include, then add the customer list that you want to use for your new Custom Audience and give it a name.
3. Review your customer list: Confirm that you mapped your identifiers correctly or check to see that all errors are resolved. You'll get one of the following notifications:
    - The green tick symbol means that your identifiers were mapped correctly and are ready to be hashed, then used for the matching process.
    - The yellow exclamation symbol means either that you chose not to include certain identifiers or that some identifiers need to be manually updated. You have

higher chances of getting a better match rate to build your audience if you make the corrections before uploading your file.

4. Upload your customer list: Once your list has been added and is ready for use, select Upload and Create.
5. Lastly, once your customer list is done populating, go ahead and create a Lookalike Audience with the customer list as your source.

For more info on how to set up FB Business Manager, check out the link below:
https://www.facebook.com/business/learn/how-business-manager-works/guide

6. Give a Partner Access to Assets in Your Business Manager (If you're working with an agency)

If you're working with an agency or consultant, partner with their Business Manager so you can share your assets with them. You can grant them access to different assets and assign specific permission levels.

For an agency to run ads smoothly, make sure you're granting them access to your Page, Ad Account, and Pixel.

Before you begin:

- Only business admins can add a partner.
- Your partner must have a Business Manager.
- You need your partner's business ID, contact name and email address.

To add partners or agencies to your business:

1. Go to Business Settings.
2. Below Users, click Partners.
3. Click + Add.
4. Select Give a partner access to your assets.
5. Enter the Partner Business ID you want to add and click Next.
6. On this screen, you can add partners to multiple assets. Choose a type of asset in the first column. Select the assets you want to add your partner to in the second column.

Assign a role for your partner in the third column. Repeat these steps until you've chosen roles for all of the assets you want to assign.

7. Click Save Changes.

Your partner can now see the assets you assigned to them in the Business Manager.

Need more help?

Just message me 🤝