

Meta Account Setup Guide

Granting Agency Access: A How-To Guide

OPTURUM

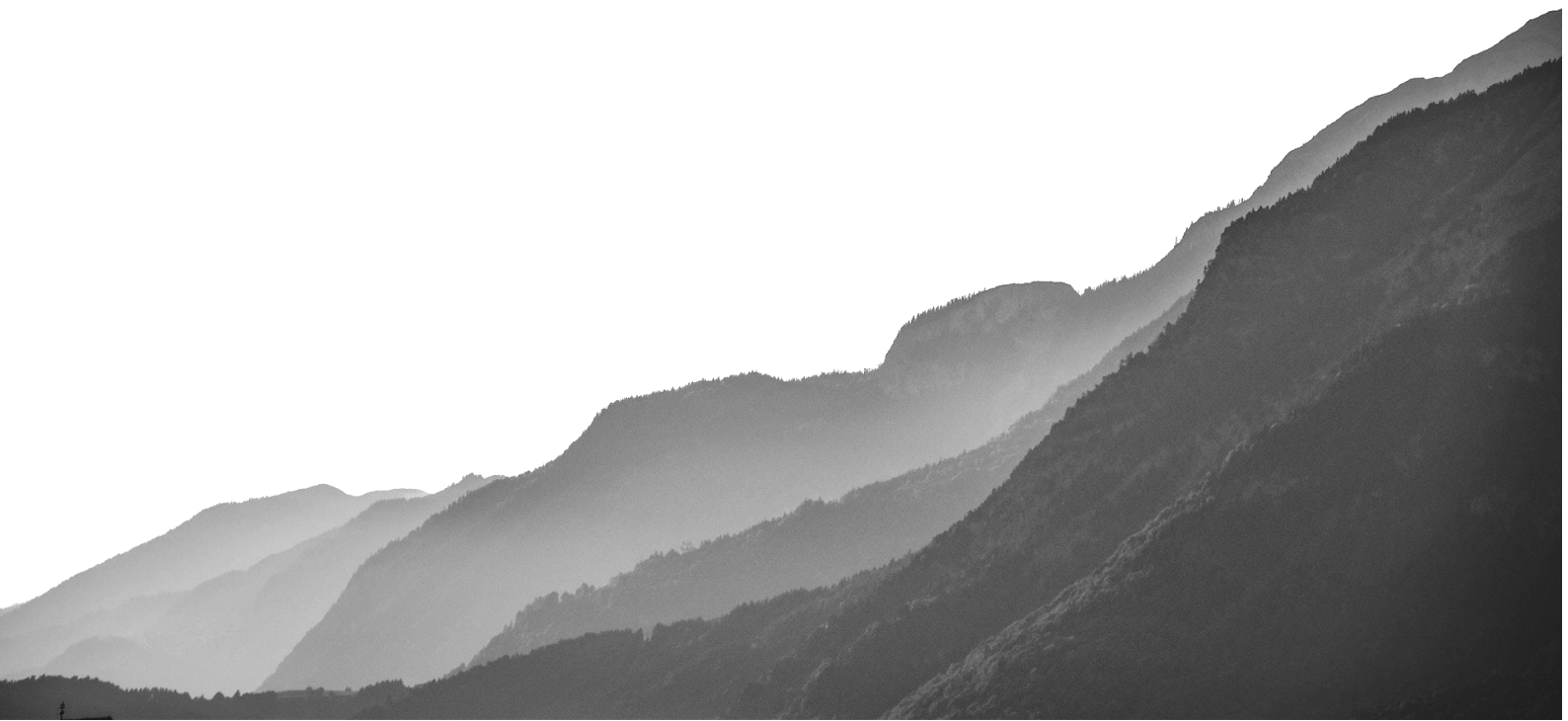


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Preface

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Welcome to the Meta Account Setup Guide, meticulously crafted by Opturum to facilitate a seamless initiation into the world of Meta advertising. This guide is an essential resource for businesses embarking on or enhancing their digital marketing journey through Meta's powerful advertising platform.

Purpose and Scope

- The aim of this guide is to provide clear, step-by-step instructions for setting up and managing a Meta Business Manager account.
- It caters to both new users preparing to create their first Meta Business account and existing users looking to optimize their current account for collaboration with Opturum.

Intended Audience

- This guide is specifically designed for clients of Opturum who are either initiating or expanding their presence on Meta's advertising platforms.

How to Use This Guide

- Navigate through the guide in sequential order, especially if you are new to Meta Business Manager.
- For experienced users, feel free to jump to the sections that are most relevant to your current needs.

Confidentiality and Redistribution

- This guide contains proprietary information and should be treated as confidential.
- Redistribution or reproduction of this guide, in whole or in part, is prohibited without prior written consent from Opturum.

Updates and Revisions

- The digital marketing landscape is ever-evolving, and so are the platforms we use. This guide may be updated periodically to reflect the latest changes and best practices.

Feedback and Support

- We value your feedback on this guide. If you have suggestions for improvement or require further assistance, please do not hesitate to reach out to your Opturum account manager.

We hope this guide empowers you with the knowledge and confidence to effectively manage your Meta advertising campaigns. Thank you for choosing Opturum as your partner in digital marketing excellence.

Introduction to Meta Business Manager

Welcome to the dynamic world of digital advertising with Meta Business Manager. As a crucial tool in your marketing arsenal, understanding and utilizing Meta Business Manager is pivotal for maximizing the impact of your online advertising efforts. This section provides an introduction to what Meta Business Manager is and why it's an indispensable tool for businesses aiming to excel in digital advertising.

What is Meta Business Manager?

- **Centralised Control:** Meta Business Manager is a free platform developed by Meta (formerly Facebook) that allows businesses to manage their advertising, Pages, and the people who work on them, all in one place.
- **Comprehensive Management:** It provides a unified view of your ad campaigns across Meta's suite of apps and services, including Facebook, Instagram, Messenger, and Audience Network. This integrated approach is essential for creating cohesive and effective marketing strategies.

Why Use Meta Business Manager?

- **Advanced Campaign Management:** With Meta Business Manager, you can create and run ads, target specific audiences, set budgets, and monitor the performance of your campaigns with detailed analytics.
- **Team Collaboration:** It simplifies collaboration by allowing you to assign roles and permissions to team members, helping in streamlining workflows and ensuring secure access to your accounts.
- **Resource Centralisation:** Centralise resources such as ad accounts, Pixels, and audiences in one place, making it easier to manage and optimise your marketing efforts.
- **Insights and Reporting:** Gain valuable insights into your ad performance and audience behaviour, which can inform future marketing decisions and strategies.

Navigating the Business Manager Interface

- **User-Friendly Dashboard:** The dashboard provides a comprehensive view of your ad accounts, Pages, and insights, all accessible from a central location.
- **Quick Access to Tools:** Tools like Ad Manager, Pixel, and Audience Insights are readily available, offering you quick access to manage and analyse your campaigns.

Setting Up for Success

- The subsequent sections of this guide will walk you through setting up your own Meta Business Manager account, granting access to your marketing agency, and utilizing various features of the platform to optimize your digital marketing campaigns.

Whether you are new to digital advertising or looking to enhance your existing efforts, Meta Business Manager is your gateway to reaching and engaging with your audience more effectively. Let's embark on this journey to unlock the full potential of your online advertising endeavours.

Creating a Meta Business Account (For New Users)

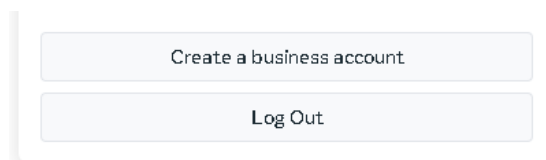
If you're new to Meta advertising and don't yet have a Meta Business Manager account, this section is for you. Setting up your account is the first step to managing your online advertising campaigns. Follow these steps to create your Meta Business Manager account:

1. Prerequisites for Account Creation

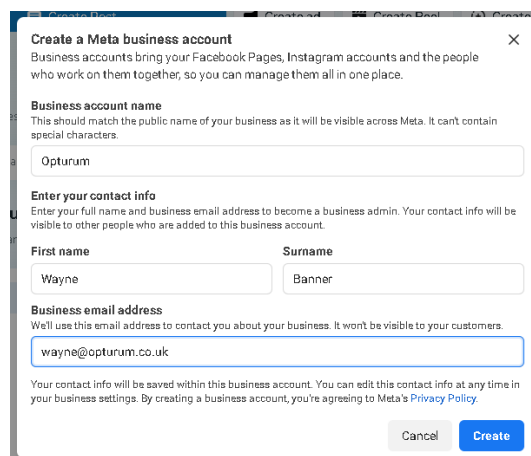
- **Personal Facebook Account:** To set up a Meta Business Manager, you need to have a personal Facebook account. This account acts as your identity verification on Meta.
- **Business Information:** Have your business details ready, including your business name, address, and contact information.

2. Step-by-Step Account Creation

- **Visit the Business Manager Site:** Go to business.facebook.com and click on the 'Create a Business Account' button.



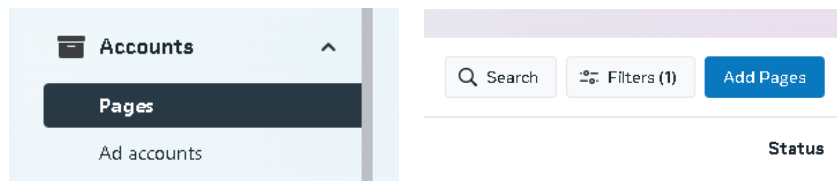
- **Log in With Your Facebook Account:** Use your personal Facebook credentials to log in. This step ensures the security and legitimacy of the Business Manager account.
- **Enter Your Business Name:** This should be the official name that your customers recognize.
- **Fill in Business Details:** Provide your business address, website, and a brief description.
- **Confirm Your Email Address:** Meta will send a confirmation email to the address you provided. Verify your email to activate your Business Manager account.



3. Adding Your Business Page

- Once your Business Manager account is set up, you can add an existing Facebook page or create a new one within the Business Manager.

- Navigate to the 'Pages' section in your Business Manager dashboard under 'Settings' and follow the prompts to add or create a page.



4. Understanding Business Manager Home

- After setting up your account, take some time to familiarize yourself with the Business Manager home dashboard. This is where you'll manage your ad accounts, Pages, and people working on them.

5. Next Steps

- With your Business Manager account ready, you can proceed to set up your ad account, grant access to Opturum, and start creating your advertising campaigns.

Important Tips

- Keep your login information secure and ensure that only authorized personnel have access to your Business Manager account.
- Regularly update your business information in Business Manager to keep it consistent with your actual business details.

Creating your Meta Business Manager account is a straightforward process that unlocks the vast potential of Meta advertising. Once set up, you can effectively manage your ad campaigns, collaborate with team members, and track your marketing efforts.

Accessing Your Existing Meta Business Account (For Existing Users)

For those who already have a Meta Business Manager account, accessing and utilising it effectively is key to managing your advertising campaigns efficiently. This section guides you through accessing your existing account and highlights some important features you may need to use.

1. Logging into Your Business Manager Account

- **Accessing the Platform:** Navigate to business.facebook.com.
- **Using Your Login Credentials:** Enter your login credentials associated with your Business Manager account. This may be your personal Facebook login if you are the account creator or owner.
- **Multi-Factor Authentication:** For security, Meta may require multi-factor authentication. Ensure you have the necessary devices or apps, like a mobile phone or an authenticator app, to complete this process.

2. Dashboard Overview

- Once logged in, you'll arrive at the Business Manager dashboard. This centralised hub provides an overview of your ad accounts, pages, insights, and other resources.
- Take a moment to familiarise yourself with the layout and where to find key sections like 'Ad Accounts', 'Pages', and 'People'.

3. Reviewing Account Settings

- It's a good practice to periodically review your account settings. Check your 'Business Info', ensuring that all details are current and accurate.
- In the 'Users' section, review who has access to your Business Manager and their level of permissions. Remove any outdated users and adjust permissions as necessary.

4. Verifying Ad Accounts and Pages

- Verify that your ad accounts and business pages are correctly added to your Business Manager. Navigate to the respective sections to view and manage these assets.
- If you need to add new ad accounts or pages, use the 'Add' button in the corresponding section and follow the prompts.

5. Preparing for Collaboration

- If you're planning to collaborate with Opturum, ensure that your account is ready for external access. This includes having a clear structure of your assets and knowing which ad accounts and pages Opturum will need access to.

6. Access Issues and Troubleshooting

- If you encounter any issues accessing your account or specific features within Business Manager, refer to the 'Help Centre' for guidance.

- For unresolved issues, you may contact Meta support or reach out to your Opturum account manager for assistance.

7. Keeping Your Account Secure

- Regularly update your passwords and manage user access diligently to maintain the security of your Business Manager account.
- Enable alerts for unrecognized logins and review your security settings periodically.

Accessing and familiarising yourself with your existing Meta Business Manager account is vital for a smooth transition into collaborative work with Opturum. A well-maintained account ensures that you can leverage the full potential of Meta's advertising tools efficiently.

Basic Navigation and Dashboard Overview

Understanding how to navigate the Meta Business Manager dashboard is essential for managing your online advertising effectively. This section provides an updated overview of the dashboard's layout and key features.

1. Dashboard Layout

- **Home Page:** Upon logging in, you'll land on the home page which provides a quick view of your recent activities and important notifications.
- **Main Menu:** The main menu, typically on the left side, allows you to navigate between different sections such as 'Ads', 'Settings', and 'Insights'.

2. Managing Ad Accounts

- **Ads Section:** This is where you can view and manage all ads linked to your Business Manager. The creation and oversight of your ad campaigns can be managed here or in the **Ad Manager**.
- **Ad Manager:** The Meta Ad Manager gives a much more granular control and overview over your ad campaigns and can be accessed through 'All Tools > Ad Manager'
- **Creating Ads:** To create new ads, go to the 'Ads' section or 'Ads Manager', accessible through the 'All Tools' option in the main menu.

3. Connecting Business Pages

- **Adding Pages:** To manage your Facebook pages, go to the 'Pages' section within the 'Settings'. Here, you can add existing pages or create new ones.
- **Managing Pages:** Once added, you can manage page roles, post updates, and view insights directly from this section.

4. Insights and Analytics

- **Accessing Insights:** Use the 'Insights' section for valuable data on the performance of your ads and pages, including metrics like reach, engagement, and audience demographics.
- **Custom Reports:** Create custom reports in the 'Insights' section to track specific KPIs relevant to your business.

5. Business Settings

- **Administrative Controls:** In Settings', manage administrative aspects of your Business Manager, including user access, billing information, and payment settings.
- **User Permissions:** Regularly review user permissions for security and efficient management of your campaigns.

6. Adding Partners and Team Members

- **Adding Individuals:** Use the 'People' section in 'Settings' to add individual team members, where you can grant varying levels of access and assign specific tasks.
- **Adding Agencies:** If you're collaborating with agencies like Opturum, use the 'Partners' section in 'Settings' to grant access. You'll need the agency's Partner Business ID to complete this step. We provided ours in your welcome email.

7. Connecting Instagram and Other Assets

- **Instagram Accounts:** To manage your Instagram accounts, navigate to 'Instagram accounts' under 'Settings' and add your accounts for integrated management.
- **WhatsApp Accounts:** Similarly, for WhatsApp marketing, go to 'WhatsApp accounts' to add and manage your WhatsApp business account.

8. Setting Up Facebook Pixels

- **Facebook Pixel:** A crucial tool for tracking conversions. Set up your Facebook pixel from within 'Business Settings' under 'Data Sources', and then 'Pixels'. If you are using Opturum's managed service, we will manage this for you.

9. Security Measures

- **Enhancing Security:** Utilise features like two-factor authentication available under 'Security Centre' in Settings' for extra protection of your business assets.

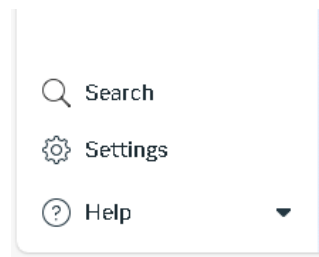
Understanding the layout and functionalities of the Meta Business Manager dashboard will enable you to efficiently manage and monitor your ad campaigns, collaborate with team members and agencies, and leverage insights to enhance your marketing strategies.

Setting Up Your Ad Account and Linking with Opturum

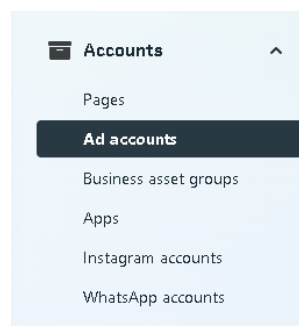
An essential component of using Meta Business Manager for advertising is setting up your Ad Account. This section guides you through the process of creating or adding an existing Ad Account within your Business Manager.

1. Accessing Ad Account Settings

- **Navigate to Settings:** In your Meta Business Manager dashboard, click on 'Settings'.

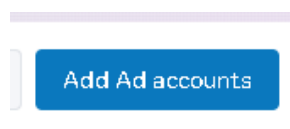


- **Selecting Accounts:** Within Settings, click on 'Accounts' and then choose 'Ad Accounts' from the options provided.

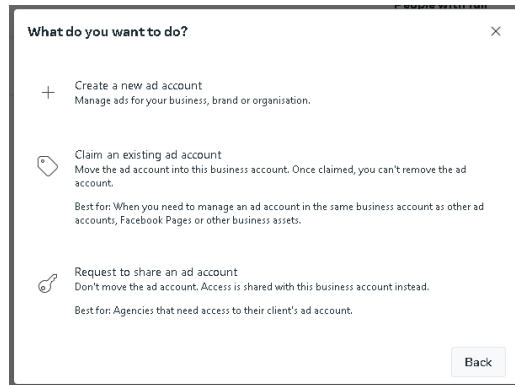


2. Creating a New Ad Account

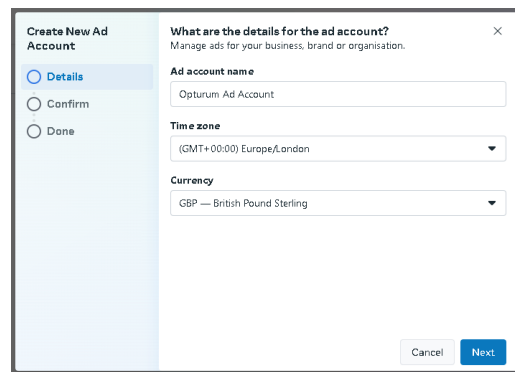
- **Add Ad Account:** If you do not have an Ad Account, click the 'Add Ad accounts' button and select 'Create a New Ad Account'.



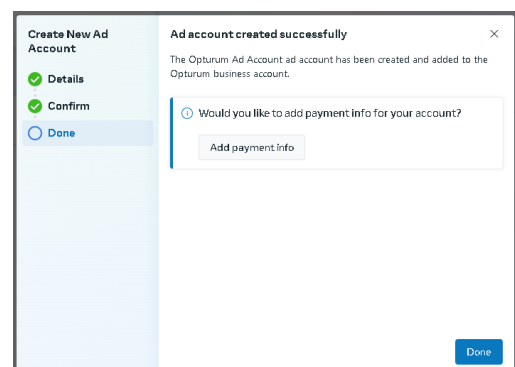
- **Create a new ad account:** You are now given the option to either create a new ad account or link an already existing one. If you have not created an ad account yet, select 'Create a new ad account'



- **Fill in the Details:** Provide the necessary information such as the ad account name, time zone, currency, and payment method. Make sure these details align with your business requirements as they cannot be changed later.

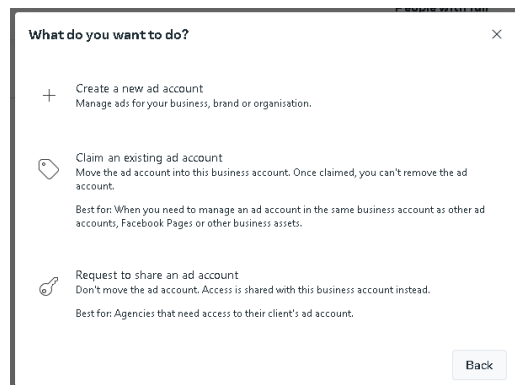


- **Add payment info:** Follow the prompts to complete the setup of your new Ad Account and finally add payment info to finish the process.



3. Adding an Existing Ad Account

- **Add an Existing Ad Account:** If you already have an Ad Account, select 'Add an Ad Account'. This is suitable if you've previously created an ad account outside of Business Manager.



- **Enter Ad Account ID:** You'll need to enter your Ad Account ID. This can be found in the dropdown menu of your existing Ads Manager dashboard.
- **Confirm Addition:** Once you enter the ID, follow the prompts to add the Ad Account to your Business Manager.

4. Assigning People to the Ad Account (Partner Link with Opturum)

- **Manage Access:** After creating or adding your Ad Account, you can assign team members or partners to work on it.
- **Assign Roles:** Click on 'People' or 'Partners' and choose whom to add to your Ad Account. You can assign roles such as 'Admin' or 'Advertiser' depending on the level of access you want to grant.

5. Reviewing and Confirming Settings

- **Double-Check Settings:** Ensure all information is correct and that the right people have the appropriate level of access to the Ad Account.
- **Payment Information:** Verify that your payment details are accurate and up-to-date to avoid any interruptions in your ad campaigns.

6. Best Practices

- **Regular Audits:** Regularly audit your Ad Account settings and access permissions to maintain security and efficiency.
- **Consistent Monitoring:** Keep an eye on billing and spending to ensure your advertising budget is being used effectively.

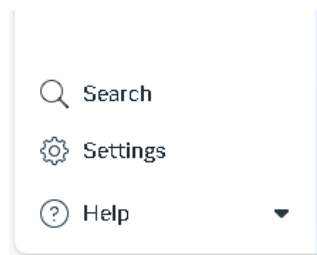
Setting up your Ad Account correctly is a foundational step in leveraging Meta Business Manager's capabilities for your advertising campaigns. A properly configured account enables you to manage your campaigns effectively, track performance, and achieve your marketing objectives.

Granting Access to Your Marketing Agency (Opturum)

For Opturum to effectively manage your Meta advertising campaigns, it is essential to grant us access to your Meta Business Manager account and specific assets. This section guides you through the process of providing Opturum with the necessary access.

1. Navigating to Settings

- **Access Settings:** In your Meta Business Manager dashboard, click on 'Settings' to manage your business's permissions and access.

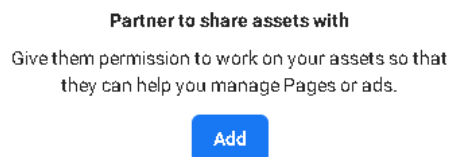


2. Adding Opturum as a Partner

- **Go to Partners Section:** Within Settings, locate and click on the 'Partners' tab under 'Users'.



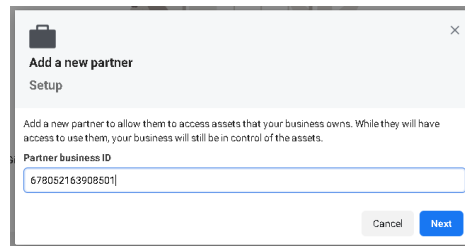
- **Partner to share assets with:** Click on 'Add' under 'Partner to share assets with'



3. Providing Partner Business ID

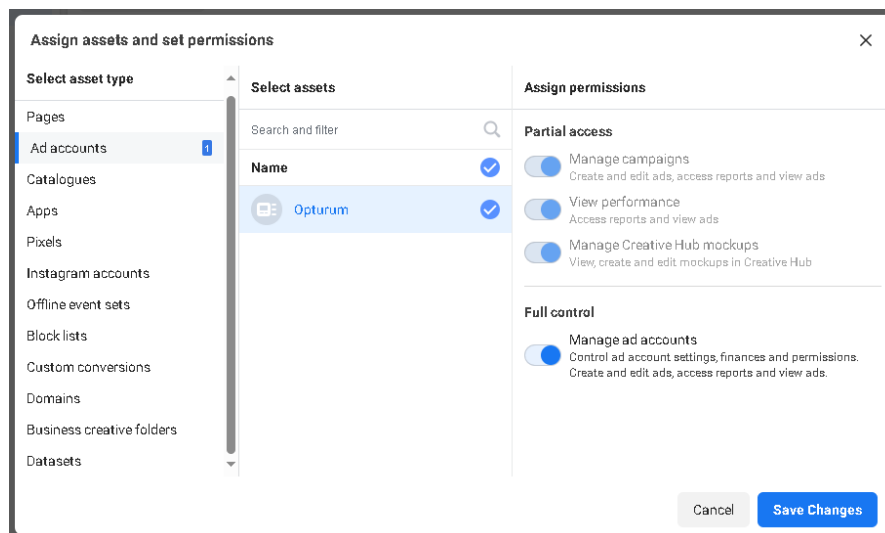
- **Use Opturum's Partner ID:** Opturum will provide you with a unique Partner Business ID. You will need this ID to add us as a partner to your Business Manager.

- **Entering the Partner ID:** In the relevant field, enter the Partner Business ID provided by Opturum and click 'Next'.



4. Assigning Access to Specific Assets

- **Select Relevant Assets:** After adding Opturum as a partner, you need to assign access to specific business assets like Ad Accounts, Pages, or Pixels. For now, select 'Ad Accounts', then select your existing ad account or the ad account you created earlier
- **Manage Permissions:** For each asset, you can set specific permissions based on the requirements of your campaigns and the level of management agreed upon with Opturum. We recommend 'Manage ad accounts' under 'Full control' however if you're in doubt, contact your account manager.



5. Confirming Access and Permissions

- **Review and Confirm:** Once you've selected the assets and set the permissions, review the settings to ensure they are correct.
- **Finalize the Process:** Confirm the changes to grant Opturum the access needed to manage your advertising campaigns.

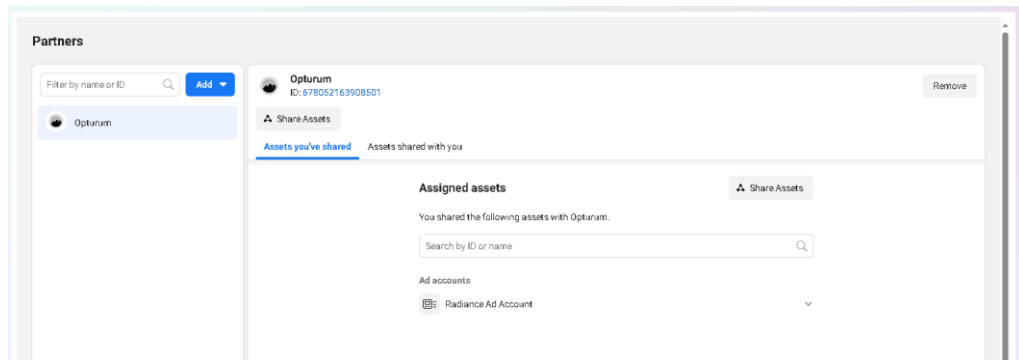
6. Communication with Opturum

- **Notify Your Account Manager:** After granting access, inform your Opturum account manager. This ensures they are aware and can begin managing your campaigns promptly.

7. Revoking or Modifying Access

- **Change in Requirements:** Should your requirements change, or you need to revoke access, you can do so at any time by returning to the 'Partners' section in Business Settings.

- **Update Permissions:** You can also modify permissions if the scope of Opturum’s services changes.



8. Best Practices

- **Regular Reviews:** Regularly review the access and permissions granted to ensure they align with your current marketing needs and privacy policies.
- **Security:** Ensure that all partners and team members adhere to your business's security and privacy standards.

By granting Opturum access to your Meta Business Manager account and relevant assets, you enable a collaborative effort to maximize the effectiveness of your Meta advertising campaigns. This partnership leverages Opturum’s expertise in digital marketing to achieve your business's advertising objectives.

Meta Pixel

The Meta Pixel is a powerful tool provided by Meta for tracking user interaction with your website. This small piece of code offers invaluable insights into the effectiveness of your advertising campaigns and helps in optimizing them for better performance.

- **What is Meta Pixel?**

- **A Tracking Tool:** The Meta Pixel is a snippet of JavaScript code that you place on your website. It tracks user activity and behaviours after they click on your ads, providing data on how they interact with your site.
- **Data Collection:** The pixel collects valuable data such as which pages are visited, actions taken (like form submissions or purchases), and other engagement metrics.

- **How is Meta Pixel Used?**

- **Conversion Tracking:** It allows you to see how effective your ads are in leading to desired actions on your website, such as sales, sign-ups, or other conversions.
- **Remarketing:** Meta Pixel enables you to target your ads to people who have already visited your website, creating highly personalized and relevant ad experiences.
- **Building Custom Audiences:** By tracking user behaviour, the pixel helps in creating custom audiences for future ad campaigns, targeting users based on specific actions they've taken on your site.
- **Campaign Optimization:** With the insights gathered, you can optimize your ad campaigns for specific conversion events, improving their overall effectiveness and ROI.

- **Importance of Meta Pixel**

- **Enhanced Ad Targeting:** The pixel provides critical data that helps in refining your targeting strategy, ensuring your ads reach the most relevant audience.
- **Measuring Ad Performance:** By understanding user actions post-click, you gain a clearer picture of your ad campaigns' performance beyond just click-through rates.
- **Data-Driven Decisions:** The insights from Meta Pixel enable you to make informed decisions about your advertising strategy and budget allocation.

- **Implementation and Management**

- **Agency Management:** Setting up and managing the Meta Pixel is a technical process that Opturum will handle for you. We ensure that the pixel is correctly implemented and that the data collected is used effectively for campaign management.

- **Privacy Considerations**

- **User Privacy:** It's important to adhere to privacy regulations and inform website visitors about the data being collected through cookies and tracking tools like the Meta Pixel.

- **Compliance:** Ensure your website's privacy policy is updated to reflect the use of Meta Pixel and complies with regulations like GDPR or CCPA.

The Meta Pixel is a cornerstone in modern digital advertising strategies. Its ability to track, analyse, and utilize user data makes it an indispensable tool for enhancing the performance of your Meta advertising campaigns.

Security and User Permissions

Maintaining robust security practices and managing user permissions effectively are critical aspects of handling your Meta Business Manager account. This section provides an overview of best practices for ensuring security and appropriately managing user access.

- **Importance of Security in Business Manager**
 - **Protecting Data:** Strong security measures safeguard sensitive business and customer data from unauthorized access and potential breaches.
 - **Maintaining Integrity:** Ensuring the security of your account helps maintain the integrity of your ad campaigns and business operations.
- **Best Practices for Account Security**
 - **Strong Passwords:** Use strong, unique passwords for your Meta Business Manager and associated accounts. Regularly update these passwords to enhance security.
 - **Two-Factor Authentication (2FA):** Enable two-factor authentication for an added layer of security. This requires a second form of identification beyond just a password.
 - **Regular Audits:** Conduct regular security audits of your account to check for any unusual activities or access points.
 - **Phishing Awareness:** Be aware of phishing attempts and train your team to recognize and report suspicious activities.
- **Managing User Permissions**
 - **Assigning Roles:** Assign roles to team members based on their job requirements. Meta Business Manager allows various roles from admin to analyst, each with different levels of access.
 - **Limiting Access:** Grant access only to the necessary tools and data that team members need to perform their duties.
 - **Regular Reviews:** Regularly review who has access to your Business Manager and their permissions. Update these as roles change or team members leave the company.
 - **Access Logs:** Keep an eye on access logs to monitor who is accessing your account and what actions they are taking.
- **Collaborating with Agencies**
 - **Agency Access:** When working with agencies like Opturum, ensure that they are granted access only to the necessary assets and data.
 - **Control and Transparency:** Maintain control over your Business Manager while providing transparency to your agency partners for effective collaboration.
- **Compliance with Privacy Regulations**

- **Adhering to Laws:** Ensure that your use of Meta Business Manager complies with relevant data protection and privacy laws, such as GDPR.
- **User Consent:** Be transparent with users about data collection practices, especially when using tools like the Meta Pixel.
- **Regular Updates**
 - **Staying Informed:** Stay updated with the latest security features and recommendations from Meta. Implement these updates promptly to maintain a secure environment.

By adhering to these security and user permission guidelines, you can ensure that your Meta Business Manager account is not only secure but also efficiently managed. This is crucial for safeguarding your business's digital assets and for the smooth operation of your online advertising activities.

Troubleshooting and Support

Even with the best planning and management, encountering issues with Meta Business Manager or specific ad campaigns is not uncommon. This section offers guidance on troubleshooting common problems and where to find support when needed.

- **Common Issues in Meta Business Manager**
 - **Login Problems:** Issues with logging in, such as forgotten passwords or locked accounts.
 - **Access and Permissions:** Difficulties in granting or receiving the correct level of access to team members or partners.
 - **Ad Disapprovals:** Ads being disapproved or flagged due to non-compliance with Meta’s advertising policies.
 - **Billing and Payment Issues:** Problems related to billing, invoice discrepancies, or payment methods.
- **Basic Troubleshooting Steps**
 - **Check the Help Centre:** Meta’s Help Centre is a comprehensive resource with articles and FAQs addressing a wide range of issues.
 - **Restart and Clear Cache:** Sometimes, simply restarting your browser or clearing the cache can resolve technical glitches.
 - **Review Account Settings:** Double-check your account settings, particularly if facing access or permission issues.
 - **Ad Guidelines Review:** If your ad is disapproved, review Meta’s advertising policies to ensure compliance and make necessary adjustments.
- **Seeking Support from Meta**
 - **Contact Support:** For unresolved issues, use the ‘Support’ or ‘Contact Us’ options within the Business Manager. Meta provides support through various channels, including chat and email.
 - **Report a Problem:** You can report specific problems directly through the Business Manager interface, providing details of the issue you’re encountering.
- **Collaborating with Opturum for Support**
 - **Reach Out to Your Account Manager:** For issues related to campaign strategy, setup, or performance, contact your Opturum account manager. They can provide expert advice and assistance.
 - **Agency-Level Support:** Opturum may have access to agency-level support channels within Meta, which can expedite the resolution process.

- **Staying Updated**
 - **Follow Updates:** Keep an eye on updates from Meta regarding Business Manager and ad platform changes. This can help in anticipating and adapting to new features or requirements.
- **Community Forums and Online Resources**
 - **Utilise Online Communities:** Online forums and communities, such as Meta’s advertiser community, can be valuable resources for solutions and advice from other users who might have faced similar issues.
- **Documenting Issues**
 - **Keep Records:** Document any persistent issues, including screenshots or detailed descriptions. This can be helpful when seeking support from Meta or discussing the problem with your agency.

By proactively addressing issues and knowing where to seek support, you can minimize disruptions in your Meta advertising activities and maintain the effectiveness of your campaigns.