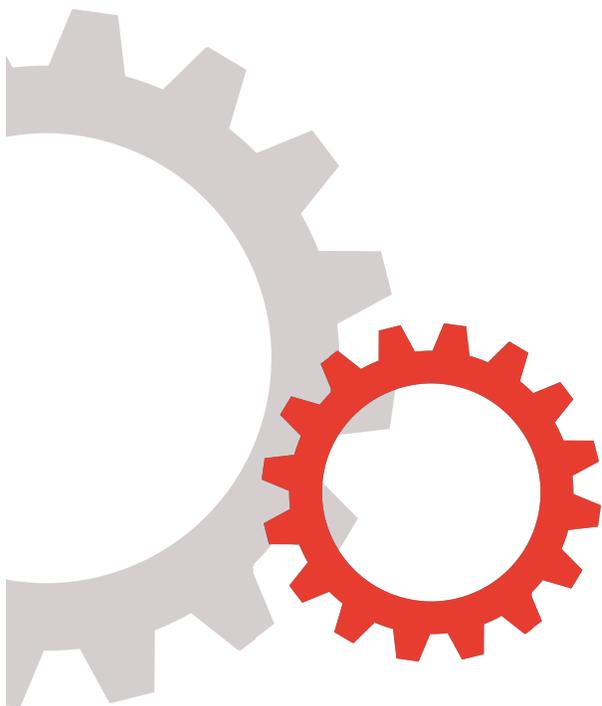


# *Business Manager 101*

Grass Roots Media



## Why Use Facebook Business Manager?

Business Manager allows you to quickly see all of your pages, ad accounts, team members and more. It also allows advertisers to manage their marketing efforts in one place and share access to assets across their team, partner agencies and other interested parties.

From a security perspective, Business Manager is especially handy when you need to give, or takeaway access to your business's Facebook assets. By using Business Manager, you don't need to be friends with people on Facebook to assign them roles for your pages, ad accounts, and so on. They never have to see your personal profile and you don't have to see theirs.

You simply go to the People section in Business Manager and add or remove their access to everything in just one click.

Not only is this tool good for managing your Facebook assets, but you can also

- Manage your Instagram accounts,
- Create audience lists
- Create & manage product catalogue
- Control user access and permissions for everyone who works on your ad accounts, pages and apps
- Create, manage and track your ads on Facebook and Instagram more efficiently, with easy overviews and detailed views of your ad spending and impressions and
- Most importantly, maintain ownership of all your assets.

# Step by Step set-up of your Business Manager Account

## Create your account

The setup process is simple. Follow these steps to get started.

1. Go to [business.facebook.com/create](https://business.facebook.com/create) and select Create Account.
2. Enter your name and confirm your identity with Facebook login credentials.
3. Follow the prompts to create your business account.

## Add assets and assign permissions

Businesses and agencies follow different processes.

### FOR A BUSINESS\*

1. Go to Settings > People and assets > People.
2. Assign authorised agents to ad accounts and Pages with the appropriate role permissions.
3. Go to Business settings > Instagram accounts > Connect any Instagram business accounts.
4. Add at least two people as Business Manager admins, and add the rest as Business Manager employees.
5. Go to Pages > Add new Pages > Claim a Page to connect your Facebook Page. If you are a Page Admin, your claim will be instantly approved. If you are not a Page Admin, a notification to approve the claim request will be sent to the current Page Admin.
6. Go to Ad accounts > Add new ad account. You will have the access to add an account you own by supplying the ad account ID, or request access to use another Business Manager-owned ad account. The ad account should be owned by the entity that pays invoices.

## Setting up payment methods

Payment methods are required to create ads on Facebook. Follow these steps for assigning payment methods when you first set up your Business Manager.

1. Add the payment methods you want to use in Business settings > Payments > Click +Add button to add a payment method.
2. Ensure you select Billing Country as the country you reside, and Currency as your local currency. Enter your Credit Card details.
3. Define permission levels in the "Ad Accounts" section. Choose 'Add People' for those who will need to access credit lines or invoice details, and choose an option from either the 'Standard Access' or 'Admin Access' list. Each access level has a small explanation underneath.

After you have completed the initial setup for payment methods, you can create ad accounts and assign payment methods as needed, on a day-to-day basis.

## Assign access levels across your team

One of the most important elements of Business Manager is giving permissions to people in your business and those who may act on behalf of your business.

Setting different access levels across your marketing team gives you better control of your assets and information. Assets that existed prior to your Business Manager account – such as Pages, ad accounts and pixels – will still be connected to your personal account with your initial permission settings. To avoid confusion, shift all business-owned assets to Business Manager.

## Privacy and security

You will use your work email to set up your Business Manager account. This way colleagues will not be able to view non-public items on your Facebook profile unless you are separately friends on Facebook. Using your personal identity ensures transparency and allows you to see who makes each change to account assets. This way, if an unusual action is discovered, you can easily speak to the person who made the change. This level of detail is not possible when single-user accounts are shared amongst multiple people.

In addition, Facebook does not permit sharing of personal accounts and credentials. Facebook operations actively remove accounts in violation of Facebook terms and agreements. If you are using a shared or fake identity, this account could be disabled and disrupt your business operations.

For complete Facebook Terms and Policies, visit <https://facebook.com/policies>.

**Want to learn how to setup advertising campaigns, use audience insights to create audiences to market too or learn how to setup a Facebook pixel?**

**Contact us for a \$47, 45 minute Business Manager 101 session**

**[info@grassrootsmedia.co.nz](mailto:info@grassrootsmedia.co.nz)**