

## What this is

**Meta Business Manager** is the “command center” for everything you run on the **ads** side of Facebook and Instagram.

It gives you one secure place to organize and control your Pages, ad accounts, audiences, and other marketing tools—so you can run campaigns, share access, and connect integrations, all from one central hub.

## Inside Business Manager:

Inside Business Manager, you store the business assets your ad campaigns depend on:

- **Facebook Pages and Instagram accounts** - the public profiles your audience sees, grouped here so you can grant or revoke access without sharing personal logins.
  - **NOTE:** Only Facebook Pages—not personal profiles—can be added to Business Manager, and only Instagram Professional accounts (Business or Creator) are eligible. Meta only allows ads from these professional accounts, which is why they’re the only ones supported here.
- **Ad accounts** - the workspaces inside **Ads Manager** where your campaigns are created, managed, and billed.
- **Pixels and other tracking tools** - code snippets that track actions (like website visits or button clicks) and feed results back into Ads Manager.
- **Custom Audiences** - audiences built from your own data, like people who visited your site, watched your videos, or appear on a customer list you upload (e.g., from a CRM or webinar signup).
  - **NOTE:** To sync contacts automatically from tools like Zapier or Make, your Custom Audience must live inside a Business-Manager-owned ad account.

## Business Manager Benefits:

- **Secure access sharing** - Grant permission to teammates, VAs, or ad agencies without giving them your Facebook or Instagram Page logins.
- **Access to advanced tools and integrations** - Use tools like Zapier, Make, and the Meta API to sync audiences, track events, and automate workflows—features only available through a Business-Manager-owned ad account.

- **Support for multiple brands or entities** - Manage several Pages, ad accounts, or Instagram profiles from a single dashboard—perfect for teams, brokerages, or anyone with more than one brand presence.

Key Term	Simple Explanation
<b>Personal profile</b>	Your individual Facebook login—e.g., Jane Doe. Required to create and access Business Manager.
<b>Facebook Page</b>	A public-facing business profile (e.g., “Acme Realty”) that you use for posts and ads.
<b>Instagram Professional Account</b>	A Business or Creator Instagram profile—required for running ads and connecting to Business Manager.
<b>Personal Ad Account</b>	The default ad account created when you boost posts from your Facebook Page or Instagram account. It’s owned by the Page but not connected to Business Manager, which means it won’t support Custom Audiences, Zapier, or other advanced tools.
<b>Business Ad Account</b>	An ad account created or owned inside Business Manager. Required for uploading customer lists, using third-party integrations like Zapier or Make, and accessing full ad platform features.
<b>Business Manager</b>	The backend hub where you control your ad accounts, Pages, Pixels, permissions, and integrations—required for advanced advertising and automation.
<b>Business Suite</b>	The dashboard for organic posting, scheduling, replying to DMs, and viewing basic performance insights across Facebook and Instagram.

## How to use this

**Before you start:** Open a laptop or desktop browser (not your phone app) and go to [business.facebook.com/overview](https://business.facebook.com/overview) — not just [business.facebook.com](https://business.facebook.com). Otherwise, Meta may redirect you into Business Suite (their organic content dashboard), which doesn’t give you access to the full Business Manager setup.

### 1. Create your Business Manager

- Log in with your personal Facebook profile (the one you normally use).

- **Note:** Business Manager isn't created from a personal account, but you must be logged into your personal Facebook profile to access it. That profile serves as your identity, but all assets inside Business Manager remain separate and business-owned.
- Visit [business.facebook.com/overview](https://business.facebook.com/overview), click **Create account**, and follow the prompts.

## 2. Confirm your business details

- Enter your business name, your name, work email, phone, and address.
- Click **Confirm**. Check your inbox and click the link in Meta's email to finish verification.

## 3. Open Business Settings

- Inside the left-hand menu, click ⚙ **Settings** → **Business Settings**.
- You're now in the "back office" where you add assets.

## 4. Confirm your own admin role

- In **Business Settings** → **Users** → **People**, find your name and confirm you're listed as an **Admin** (not just Employee).
- You'll be able to assign yourself access to Pages, ad accounts, and other assets once they're added in the next steps.
  - **Why it matters:** Creating the Business Manager makes you the owner, but it doesn't automatically assign you access to every asset. You'll need to add that access manually once assets are inside your Business Manager.

## 5. Add or claim your Facebook Page

- In the left menu choose **Accounts** → **Pages** → **Add**.
- Pick one:
  - **Create** - make a brand-new Page.
  - **Claim** - pull in a Page you already admin.
  - **Request access** - ask a client to grant you access.

## 6. Create or claim an Ad Account

- Go to **Accounts** → **Ad Accounts** → **Add**.
- Choose **Create** (new) or **Claim** (existing ID).

- Meta lets each personal profile create up to two new ad accounts.

## 7. Add a payment method

- In **Billing** → **Payment methods** click **Add** and enter a credit card, PayPal, or direct debit.
- Ads and Custom Audiences will not run without this step.

## 8. Connect your Instagram Business or Creator profile

- Choose **Accounts** → **Instagram accounts** → **Add**.
- Log in and approve the connection.

## 9. (Optional) Add extra assets now

- **Data Sources** → **Pixels** - track website visitors.
- **Custom Conversions, Catalogs, WhatsApp numbers** - add these if you plan to use them later.

## 10. Invite teammates or partners

- Click **People** or **Partners**, depending on who you're adding. For individuals, go to **People** → **Add**, enter their work email, and choose **Employee** or **Admin**. For outside businesses or agencies, go to **Partners** → **Add** and enter their Business Manager ID.
  - **Note:** Even if you invite someone using their work email, they'll still need to log in with their **personal Facebook profile** to accept the invite and access Business Manager. The email you enter doesn't have to match their Facebook login—it's just used for the invitation.
- Flip on only the assets they need (Page, ad account, pixel, etc.).

## 11. Secure and certify your account

- In **Business Settings** → **Security Center** turn on two-factor authentication.
- Accept any required **Meta terms**—such as Custom Audience Terms, Lead Ads Terms, or Housing Category certifications—depending on which tools you'll be using.
- Choose your **Primary Page** under **Business Info**. This links your Business Manager identity to one of your Facebook Pages. It's often required for verification and public transparency in ads.

Once these steps are done, you'll have a properly-wired Business Manager that can receive contacts from Zapier into a Custom Audience—exactly what you need for your upcoming automation.

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