

facebook Business manager

The problem.

As an agency owner you've no doubt encountered issues with the setup of your Facebook or Instagram Business accounts when on the Facebook platform. At times it may seem like you need a doctorate in Social Media to understand how to set things up correctly.

We've created this handbook to untangle the frustration that you may have felt and provide you with a guide to ensure your Facebook Business Manager is set up for success.

We have also included a handy client setup checklist you can download and provide to your client to help them get set up.

The ultimate aim is to have your clients Facebook and Instagram accounts set up in the most secure way possible whilst also conforming to Facebook's rules and regulations.

Facebook has stated there's only one way to ensure your businesses safety on Facebook and Instagram and that is to use Facebook Business Manager.

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Getting started with Facebook Business Manager.

In order to create a Facebook Business Manager account, you need to first ensure that you have a personal Facebook account in order to confirm your identity.

You use your Facebook 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.

It's important to note that for every Facebook account you can only create two Business Manager accounts. If you require more than this you would need to have an additional Facebook account.

1. *Setting up Facebook Business Manager.*

- a. Go to: business.facebook.com/overview.
- b. Click **Create Account**.
- c. Enter a name for your business, your name and your work email address and click **next**.
- d. Enter your business details and click **Submit**.

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Facebook pages.

Once you have set up your Facebook Business account you can then look to add in your assets. An asset can be a Facebook page, Instagram account, another user and a host of other things.

It makes sense to add your Facebook page as a first step. To add a page there are a few prerequisites that must first be met:

- To add a Page to the Business Manager, you must also have been an admin on the Page for more than seven days. If you aren't an admin on the Page, you'll have to request access to the Page.
- You must be an admin in the Business Manager.
- The Facebook page you're trying to add can't be owned by another person or business for further information on this see the good/news bad news section.
- If your Page is linked to an Instagram business account, you should also add your Instagram business account to your Business Manager.

2. *Adding your Facebook Page.*

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

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Instagram accounts.

Once the Facebook Page has been added if you plan to use the direct posting options available with Instagram Business, you would also need to add this into your Facebook Business Manager.

There are (again) a few essentials that need to be met in order to add an Instagram account to your Business Manager these are:

- To add an Instagram business account to your Business Manager, you must have the username and password for the account.
- The Instagram business account you're trying to add can't be owned by another business. Instagram business accounts can only be claimed by one Business Manager.
- Only admins of the Business Manager can add Instagram business accounts in the Business Manager.

3. *Adding your Instagram account.*

- a. Go to **Business settings.**
- b. Click **Accounts.**
- c. Click **Instagram accounts.**
- d. Click **+ Add.**
- e. Enter your Instagram username and password. Click **Next.**
- f. Select the ad accounts and Pages that you'd like to assign and click **Next.**

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Your Business ID.

For clients and agencies to work together, the two Business Manager accounts (client & agency) need to be partners.

One of the most important things you'll need when setting up this partnership is the **Business ID**.

A **Business ID** is a unique identifier that is assigned to each Business Manager (similar to your bank account number).

4. *Finding your Business ID.*

- a. Go to **Business settings**.
- b. Click **Business info**.
- c. Below Business Manager info, you'll see your ID number.

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Setting up partner access.

When you add a partner to your Business Manager, you can grant access to different assets and assign specific permission levels. Partners can see assets that you share with them in their Business Manager.

Before you begin there are prerequisites that need to be met:

- Only business admins can add a partner.
- Your partner must have a Business Manager. If they don't, ask them to create a Business Manager.
- You need your partner's business ID. Learn how to find your business ID.

5. *Adding a partner to work with.*

- a. Go to **Business settings**.
- b. Below **Users**, click **Partners**.
- c. Click **+ Add**.
- d. Select **Give a partner access to your assets**.
- e. Enter the Partner business ID you want to add and click **Next**.
- f. On the next screen, you can add partners to multiple assets.
- g. Choose a type of asset in the first column.
- h. Select the assets that you want to add your partner to in the second column.
- i. Assign a role for your partner in the third column.
- j. **Repeat these steps until you've chosen roles for all of the assets that you want to assign.**
- k. Click **Save Changes**.

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Requesting access to assets.

If your client has already set up their Facebook Business Manager account and has added all the assets such as Facebook pages and Instagram accounts you can also request assets from them.

Before you begin requesting assets a few conditions must be met:

- Only Facebook Business admins can add partners.
- Your partner must have a Business Manager. If they don't, ask them to create a Business Manager.
- You need your partner's name, email and business ID.
- An admin must complete your request.

6. *Requesting assets from your clients.*

- a. Go to **Business settings**.
- b. Below Users, click **Partners**.
- c. Click **+ Add**.
- d. Click **Ask a partner to share their assets**.
- e. Enter the contact name, contact email and Facebook Business ID of the partner you want to add. Choose Your business' role and The partner's role. Then click **Next: Request asset types**.
- f. Choose the types of assets and business-level permissions that you want to request. Your partner will select specific assets and permissions to share when they respond.
- g. Review your request and click **Send**.

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Common pitfalls.

You may have clients who are hesitant about using Facebook Business Manager as it can seem quite daunting on initial impressions. Don't worry though, using this guide should alleviate some of yours and your clients concerns.

A common practice has been to request access to a clients Facebook page through the use of Page Roles found in the Facebook Page settings. This was a very simple process and could be set up really quickly - though quicker isn't always better.

This led to some unpleasant experiences for everyone involved (agency & client). Though unknown at the time this often meant that the client had (for all intents) signed over their Facebook Page to the agency they were working with.

A Facebook page should be viewed as a business asset (after all it's a marketing tool). Ownership of a Facebook page should remain with the business owner and not an agency or anyone outside of the business.

The repercussions of these setup issues can be quite severe and can range from the inability to create ads, Instagram Business set up issues, loss of administrator rights and in some cases loss of the Facebook page itself.

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That would never happen to me!

You may have some clients thinking that these issues would never happen to them, after all, they wouldn't invite someone as an administrator to their page and sign away an important business asset.

Or would they?

This practice of page role administrators has also been commonplace with Social Media Agencies. After all, it was the quickest and easiest way to gain access to the accounts.

Though (as mentioned), quicker is not always the best option.

If an admin is assigned through the Page Roles on a Facebook Page, that admin can effectively take ownership of the page and add this page to their own Facebook Business Manager.

A Facebook page cannot be owned by more than one Facebook Business Manager at a time.

This means that if a clients page has been added to a Facebook Business Manager that they cannot access, they could potentially lose all access to the Facebook Page.

Using Facebook Business Manager in the correct way minimises the risk of this happening.

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How to get further help.

If your client finds themselves in a position where they need to reclaim the ownership of your Facebook page, then not all is lost.

Having the ownership of your Page transferred over to their own Facebook Business Manager is indeed possible.

Although it is possible to transfer a Facebook page from one Facebook Business Manager to another, this isn't always successful.

There are a lot of moving parts involved which sadly makes the process far from smooth. You would need to speak to Facebook for help.

<https://www.facebook.com/business/help/>

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Client setup checklist.

To help guide your client through the setup process for **Facebook Business Manager** we have created a PDF which you will need to download and send to them.

The client checklist is a condensed version of this handbook with key points for them to check off as they go through the setup.

You can access the client checklist by clicking on the following link:

[Client set up checklist.](#)

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In summary.

I hope you have found this guide on understanding Facebook Business Manager in 10 easy steps useful.

If you have followed this handbook all the way through you should now have a deeper understanding of:

- Why you should be using Business Manager.
- Common pitfalls that may have occurred when gaining access to your client's accounts.
- What to do if you have encountered some of the more common pitfalls.
- How to set up a Business Manager account, add your Facebook & Instagram accounts, how to set up a partnership with your clients and how to request assets.

Some of this information has been taken directly from the Facebook Business Manager documentation. If you are looking for further information on this subject I would highly recommend popping across to the following link:

<https://www.facebook.com/business/help/>

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