Business Manager User Playbook

facebook

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Business Manager User Playbook

Introduction

Business Manager is an essential tool for organizations (e.g. Agency, Client Marketer, or Facebook Marketing Partner) to share their Facebook assets among multiple people efficiently and securely. Whether you are new to Business Manager or just looking to answer specific questions, this guide should provide the information you need to make confident decisions about your marketing operations on Facebook.

So first things first, **what is Business Manager and how to know if it is the the right tool for you?** The Business Manager portal was created to help organizations integrate Facebook marketing efforts across their business and with external partners and vendors. **Business Manager is a solution for anyone who needs to run, place, or track Facebook and Instagram ads, or anyone managing assets such as a Facebook Page, Instagram account, audience list, product catalog, etc.**

By having all your Facebook information in one place, your organization can easily maintain control of your Facebook assets, and securely manage user access and permissions.

Use Business Manager if

1. You have more than 1 person working on your Facebook and/or Instagram marketing.
2. You need to manage multiple Facebook and/or Instagram assets such as Facebook Pages, ad accounts, or pixels.
3. You use a vendor to help create, run, or manage your Pages or ads, and want your business to maintain ownership of all your assets.
4. You want centralized control over access and permissions to your assets.
5. You want to request access to other Pages, ad accounts, and apps, or share your Pages, ads accounts, and apps with other agencies.

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How to get started with Business Manager

Preparing for your Business Manager account.

1

To sign-up you will need:

a. A personal Facebook account for the purposes of confirming your identity.

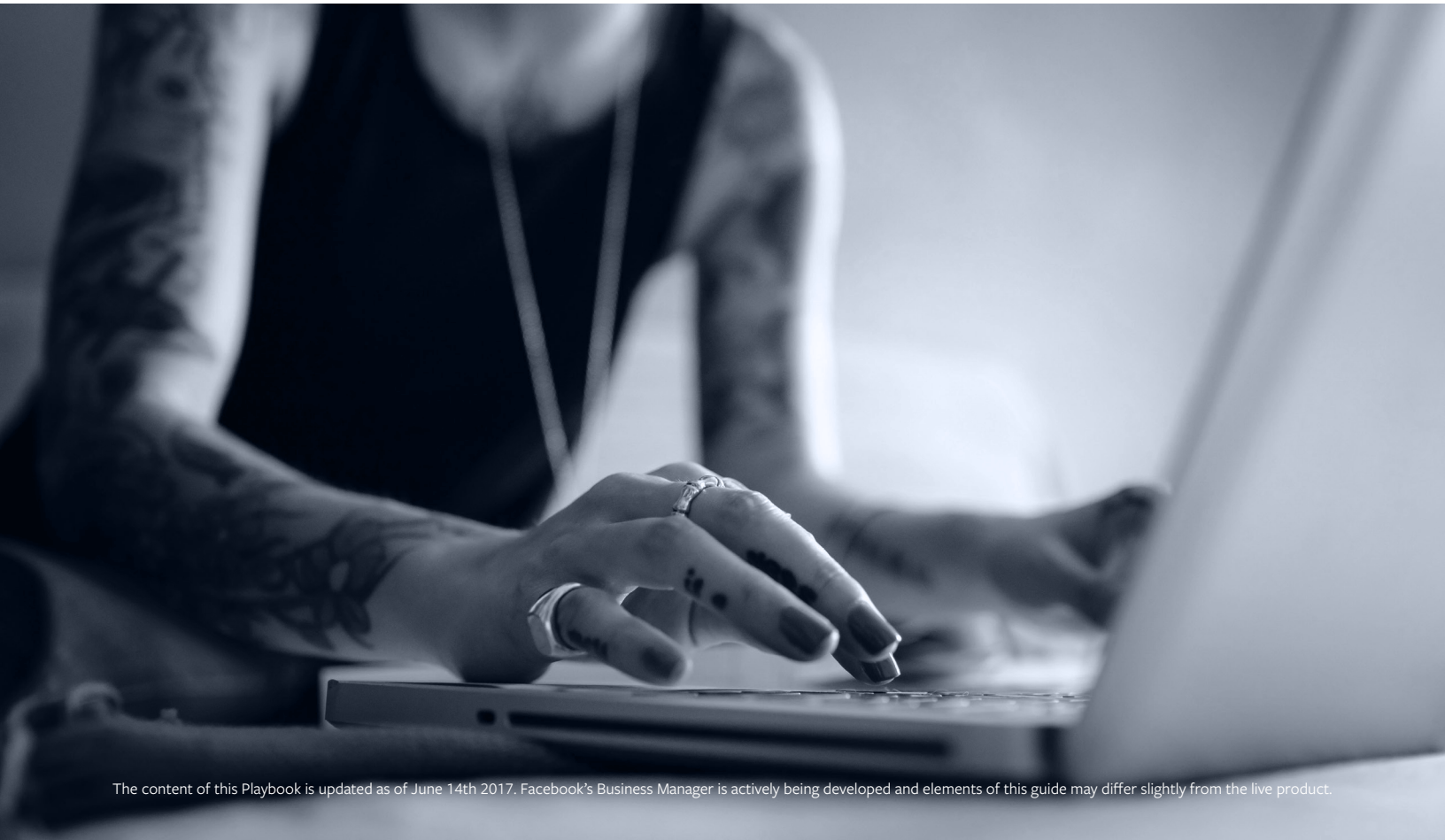
b. A Facebook Business Page that represents your business. If you don't have one, you'll be able to create a Page during setup.

2

Establish who the most appropriate people to have admin roles* for your business. Ideally, the primary day-to-day contacts of your marketing team, or your business owner, can set up and manage your Business Manager. These people should have permissions to act on behalf of your business and to decide which partners should have access to your assets.

It is important that all businesses have at least 2 admins. If one admin suddenly leaves the company, there will still be a Business Manager Admin left to help manage access to Business.

* More details on admin roles can be found later in this playbook.



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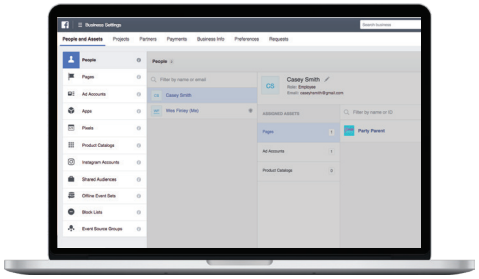
Step by step set-up process for your business:

Login to Facebook in your desktop browser

Open a separate tab and go to business.facebook.com/create to get started with "Create Account"

a. Enter your name and confirm your identity with Facebook login (your personal Facebook account information is not shared with colleagues of your company)

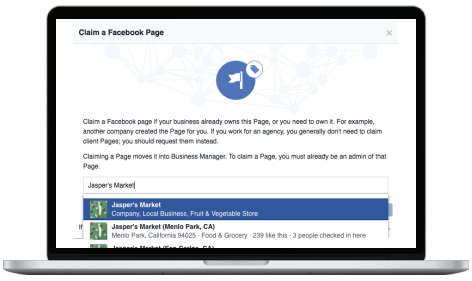
b. Follow the prompts to complete business account creation.



In Business Manager Settings, go to People in "People and Assets"

a. Go to People and assign authorized agents to Ad Accounts and Pages with the role permissions they need to complete their work. There are various levels of permissions for People, Pages and Ad Accounts. These permissions are described in detail later in this guide.

b. Click on the Instagram Accounts tab within Business Settings menu and connect any business Instagram accounts



Once you've added people and assets to your Business Manager it's time to assign permissions.

a. Add the names of 2 or more people as Business Manager Admins, then add names of any other people as Business Manager Employees. Use their work emails to send the invites.

b. Go to Pages and select "Add New Pages" then "Claim a Page"

- If the BM Admin claiming the Page is also a Page Admin directly on the Page, the claim will automatically be accepted. If you are not the Page Admin, a notification will be sent to approve the request

c. Go to "Ad Accounts"

- If you will be purchasing your own advertising and not working with an agency you will need to Claim or Create new Ad Accounts. For this, go to "ad accounts"

d. If you have Instagram accounts add any business accounts using Instagram login credentials

If you work with an agency

You can add agencies as Partners to your Business Manager. Partners can be granted any level of access to your owned Business Manager assets. Partner agencies can then manage the individual partner-level user permissions within their own organization's Business Manager. Your Partner agency can assign its own employee permissions to work on your assets, so you don't have to worry about role changes within the agency.

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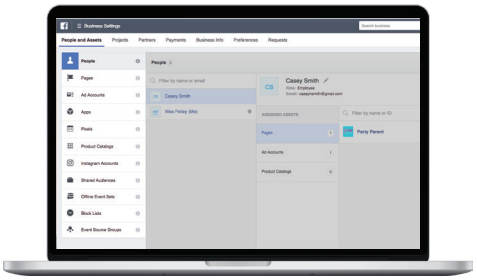
Step by step set-up process if you are advertising on behalf of a business (example: Agency)

Login to Facebook in your desktop browser

Open a separate tab and go to business.facebook.com/create to get started with "Create Account"

a. Enter your name and confirm your identity with Facebook login (your personal Facebook account information is not shared with colleagues of your company)

b. Follow the initial business creation steps/flow (name of the business etc..)



In Business Manager Settings, go to People in "People and Assets"

a. Go to People and add two or more people as Business Manager Admins, then add the rest as Business Manager Employees.**

b. Go to Pages and "Add New Pages" then "Request Access to a Page"

- Choose the appropriate level of Page Admin access necessary for your employee(s) to perform their work

c. Go to "Ad Accounts", then Claim or Create new Ad Accounts

d. Go to Instagram and add Instagram accounts using their login details

e. Alternatively, if your agency clients have in their own Business Manager, they can grant you access by adding your agency partner ID to their Business Manager settings

Once all those People and Assets are in your Business Manager

Go to People and assign employees to Ad Accounts and Pages, then Instagram accounts to Ad Accounts

** More details on roles can be found later in this guide.

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Privacy and Security

During the set up process, you will use your personal Facebook identity to connect with your Business Manager. Colleagues will not be able to view non-public items on your Facebook profile unless you are separately friends on Facebook.

We require individuals to use personal logins and maintain security for our business clients. Individual personal identities provide transparency by allowing you to see who makes each change to account assets. If an unusual action is discovered you can easily reach out to the individual who made the change. This level of detail is not possible when single user accounts are shared among multiple people.

In addition, Facebook does not permit sharing of personal accounts and credentials.

The Facebook Operations Team actively removes 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

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Primary permissioning layers

Before we explain roles across assets it is important to understand the two layers of access within Business Manager.

Layer 1 Business Manager specific

This layer includes people who should be allowed to interact either as a Business Manager Admin or a Business Manager Employee.

Layer 2 Across Facebook ads products

This level allows you to connect all your Facebook and Instagram assets and people together inside your Business Manager.

TIP *Every person should use their individual Facebook account to get any type of role in Business Manager. By only granting access to true accounts, Business Manager Admin can identify who is doing what on behalf of the business.*

Layer 1, Business Manager specific

There are 2 types of roles to consider within the Business Manager layer.

Business Manager Roles	Business Admin	Business Employee
View business settings	●	●
Change business settings	●	
Add/remove employees	●	
Manage employees permissions	●	
Be assigned to Ad Accounts/Pages	●	●
Add Pages/Ad Accounts	●	●

Business Admin
Can control all aspects of Business Manage including modifiying or deleting the business and adding or removing people from the employee list

Business Employee
Can see all of the information in the business settings and be assigned roles by business admins, but can't make any changes

TIP *Ideally, there should always be at least* ***two active Business Manager Admins.*** *This way, should one Admin leave the business, there is still another person who can assign new Admins, and continue to manage advertising for all assets.*

Layer 2, across Facebook assets

Facebook Pages (also applies for Instagram accounts and Apps)

Pages are assets on Facebook that are controlled by the business they represent. Pages can only be claimed by one Business Manager, but they can have multiple Partner or individual accounts to buy ads. There are 5 different types of permission roles available. These roles can be assigned to individuals in your business or Partner accounts (separate Business Managers) who request access to your Page.

Layer 2, across Facebook assets

Ad accounts

Ad accounts allow businesses to purchase advertising on connected Pages or Apps. Every ad account should have an associated payment method, and an authorized person that can purchase ads based on that account.

Ad accounts should be "owned" by the Business Manager of the party that is managing/paying invoices. However, the use of ad accounts can be shared with any business advertising on behalf of your business to allow them to run ads or perform analytics.

Ad Account Roles	Admin	Advertiser	Analyst
View Ads	●	●	●
Access reports	●	●	●
Create and edit Ads	●	●	
Edit funding source	●		
Manage admin permissions	●		

Admin
Can manage all aspects of campaigns, including creating reports, viewing and editing billing and assigning Ad account roles

Advertiser
Can create and edit ads using the payment method associated with the Ad account

Analyst
Can view ad performance

Finance Editor and Analyst roles in Business Manager

	Finance Editor	Finance Analyst
View financial details and business info	●	●
View invoices	●	●
View account spending details	●	●
View payment methods	●	●
Complete credit application	●	
Edit financial details and business info	●	
Edit invoices	●	
Edit account spending details	●	
Change payment methods	●	

You can assign these roles to someone by going to *Business Manager Settings -> People and Assets -> People*

Layer 2, permissions to other assets

Apps

Apps can be claimed and owned within Business Manager. Apps claimed by a Business Manager receive a Business Manager ID that helps admins identify users downloading any of their organization's apps.

1. When an app is claimed by a Business Manager the app can then be shared with third party partners who can manage the app settings.

2. An app in Business Manager can also be connected to one or more ad accounts.

Note that developer permissions and access to apps are managed at the app dashboard and not through Business Manager.

Pixels

Pixels can be shared with other Business Manager Parters. Once you create a pixel in Business Manager, you need to associate your pixel with an ad account.

If someone else is managing your ads for you, you can assign them partnership to the pixel. (Click Assign Partner and type in their business ID to give them access to your pixel).

Audiences

Shared audiences are a way to allow other people access to the audiences you've created for your ads. You can bulk share Custom and Lookalike Audiences between ad accounts and/or media agencies as long as both the sharer and recipient are tied to a Business Manager.

- If an audience is shared with you, you can create a Lookalike Audience with it, but you can't edit or re-share it
- If you're using a shared audience for an ad set and the owner of the audience deletes it, your ad set will be made inactive and you'll be prompted to choose a new target audience for it
- You can't share Saved Audiences
- You're not allowed to sell your audiences to other businesses

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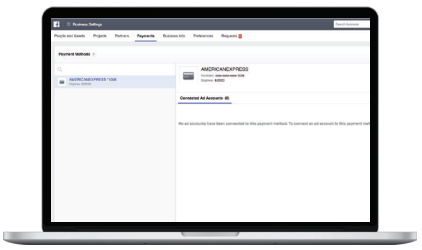
Billing & payments

Why do I need Payment Methods in my Business Manager?

Payment Methods are required in order to create ads on Facebook. If you do not have a Payment Method assigned to your ad account, you will not be able to create ads.

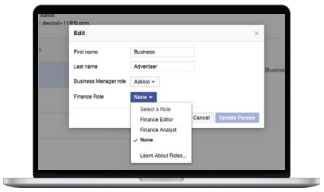
Initial Setup Step by step process

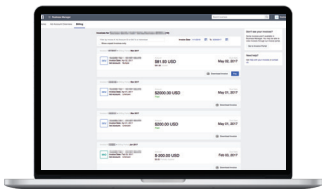
These steps should be completed when initially setting up your Business Manager before ad accounts and ads can be created.



1. In Business settings add the payment methods you would like to use by going to the payments tab

2. If you are eligible for a line of credit, check to see if your credit line is available in Business Manager by either reaching out to your Facebook Sales Rep or logging into facebook.com/business/resources and selecting the "Billing And Payments" topic.



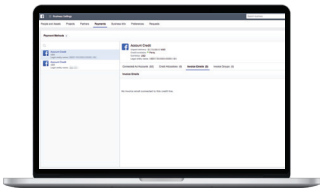


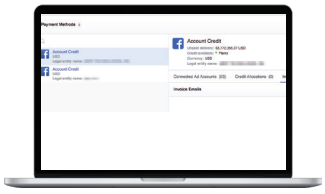
3. Define a permission level in the Finance users roles. You may choose between the Finance Editor role, for those who will need to access credit lines and/or invoice details or the Finance Analyst role for those who will only need to view the information.
To define these roles a Business Manager Admin should complete these steps:

a. Go to People in Business Manager and select the person who needs the role

b. Select the edit icon next to their name

c. In the dialog box, under Finance Role, select Finance Editor





4. Update email addresses that need to receive invoices in Payments - Account Credit - Invoice Emails

5. View Unpaid Delivery (balance) of credit line and general health under Payments section in Settings

6. Share your credit line to other Business Managers, such as agencies, that need to access it.

After your Payment Methods have been setup, you can complete these steps for creating ad accounts and assigning a payment method to them (day to day).

1. Create a new ad account and assign a payment method to it. Note, only the Business Manager that owns the ad account can assign a payment method to it.

    a. Go to Add New Ad Account and click Create a New Ad Account. Once a currency and time zone have been selected, click Select payment method. Confirm that you have selected the right payment method and click Continue.

2. Assign a payment method to an existing ad account.

    a. Open the ad account in Ads Manager. Navigate to the Billing and Payments section. In the Payment Methods section, click the Add Payment Method button. Select Payment Method from Business Manager and click Continue.

    b. You can reference this Help Center link for more information - https://fb.me/bmpaymentmethods

3. Access Monthly Invoices in Business Manager

    a. Invoices generated on a Business Credit Line can be accessed by Finance Editors and Finance Analysts by going to Business Manager Home and then navigating to the Billing tab.

4. Granting an agency access to a credit line (sequential liability)

    a. If you have an agency that uses your credit line on Sequential Liability, you will need to share your credit line to their Business Manager. Once the credit line has been shared, the agency can create the ad account and assign it to your credit line.

    b. To share, go to Business Manager Settings and then navigate to the Payments section. Once there, a Finance Editor will need to select the credit line to be shared.

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