

Un-Bungle My Business Manager

workbook



Un-Bungle Your Business Manager

A 4-STEP GUIDE TO CORRECTLY SETTING UP YOUR BUSINESS MANAGER ACCOUNT

1. VERIFY AD ACCOUNT

- ☐ In Ads Manager, check to see which Ad Account you've been using
- ☐ Note the ID# + name on the worksheet for later reference
- ☐ Decide: do you wish to keep this Ad Account and the related Pixel + Audience information?

2. VERIFY PIXEL

- ☐ Install the Facebook Pixel Helper plug-in for Chrome
- ☐ Check your website + other web properties for pixels; note the ID#
- ☐ Check your Ad Account's Pixel; note the ID #
- ☐ If NOT the same, decide: which Pixel do you wish to keep?

3. SET UP BUSINESS MGR

- ☐ If you have not already, follow the steps to create your new Business Manager account:
Go to <http://business.facebook.com> to begin the process.

NOTE: DO NOT CREATE A NEW AD ACCOUNT DURING THIS PROCESS IF YOU PLAN TO USE YOUR OLD/PERSONAL AD ACCOUNT!

4. VERIFY BUSINESS MGR

- ☐ In Business Manager Settings, add/verify Users
- ☐ Add/verify FB Business Page
- ☐ Add/verify IG Business Profile
- ☐ Add/verify Ad Account (if using former Personal Ad Account, select "Add Account and enter ID#)
- ☐ Connect Ad Account to IG Business Profile > Connected Assets
- ☐ Verify/connect Pixel. (Data Sources > Pixel). First, add/verify yourself under People. Then, add/verify that your Ad Account is connected under Connected Assets)
- ☐ Verify Your Domain



Your Assets

BUSINESS MANAGER NAME + ID #

AD ACCOUNT NAME + ID # / IS THIS A PERSONAL AD ACCT?

FB BUSINESS PAGE NAME

IG BUSINESS PROFILE NAME

PIXEL NAME + ID #

ACCOUNTS I NEED TO RENAME

Notes

NOTE YOUR ACCOUNTS, ID NUMBERS, NAMES AS YOU INSPECT YOUR SET UP

