

Meta Business Manager Setup Checklist

Structure · Roles · Verification · Security · Do's and Don'ts | STUDIO COMMUNICATIONS

1 · FOUNDATION

- ☐ **DO** Create one business portfolio per legal entity.
- ☐ **DO** Name it with the exact registered legal name.
- ☐ **DON'T** Create extra portfolios to escape a restriction or to separate campaigns.
- ☐ **DO** Verify the business immediately: certificate of incorporation, matching address, utility bill or bank statement in the same name.
- ☐ **DO** Verify every domain you advertise on, inside this portfolio.
- ☐ **DO** Use a business email on the verified domain for the portfolio.

2 · ASSETS

- ☐ **DO** Bring the existing Facebook page in; never create a duplicate page to start clean.
- ☐ **DO** Connect the Instagram professional account directly in the portfolio, not via a personal login.
- ☐ **DO** Create the ad account inside the brand's own portfolio, with the correct currency and time zone (both are permanent).
- ☐ **DO** Create one dataset (pixel) per domain, owned by the brand portfolio; connect the Conversions API with matching event IDs for deduplication.
- ☐ **DON'T** Let an agency create your page, pixel or ad account inside its own portfolio.
- ☐ **DO** Apply a naming convention from day one: TYPE - Brand - Unit - Purpose (e.g. AD - Coast - Main).

3 · PEOPLE AND ROLES

- ☐ **DO** Assign exactly two portfolio admins: permanent employees, both with two-factor authentication.
- ☐ **DO** Give everyone else employee-level portfolio access plus per-asset task permissions.
- ☐ **DO** Restrict who can change payment methods and spending limits on each ad account.
- ☐ **DO** Add agencies and freelancers as partners with task access - never as portfolio admins, never via shared logins.
- ☐ **DO** Remove access the day someone leaves; review all access quarterly.
- ☐ **DON'T** Rely on a personal profile as the owner of any business asset.

4 · SECURITY

- ☐ **DO** Enforce two-factor authentication for everyone in the portfolio (Security Centre requirement).
- ☐ **DO** Set an account spending limit as a hard ceiling on every ad account.
- ☐ **DO** Turn on notifications for policy, billing and permission changes.
- ☐ **DO** Keep a written register: admins, asset IDs, verified domains, payment methods, partner links.

5 · MEASUREMENT BEFORE SPEND

- ☐ **DO** Install the pixel via a tag manager, gated behind consent.
- ☐ **DO** Run browser pixel and Conversions API together; verify deduplication in Test Events.
- ☐ **DO** Configure aggregated event measurement on the verified domain (iOS).
- ☐ **DO** Map 4-7 standard events to real funnel steps; send value and currency with revenue events.

6 · THE DON'TS THAT GET ACCOUNTS RESTRICTED

- ☐ **DON'T** Create a second account or portfolio while one is restricted.
- ☐ **DON'T** Attach a payment method previously tied to unpaid or disputed charges.
- ☐ **DON'T** Scale a new account's spend by more than ~20% every few days.
- ☐ **DON'T** Resubmit rejected ads repeatedly without changing the cause.
- ☐ **DON'T** Run ads from a page with unresolved quality violations.

If a restriction happens anyway: open Account Quality, complete identity confirmation, fix the flagged asset, and request review once - with asset IDs and a factual timeline. Duplicate assets convert a suspension into a circumvention violation.

Companion reading: studio-comms.com/insights/meta-business-manager-setup · [/insights/meta-account-structures-agency-inhouse](https://studio-comms.com/insights/meta-account-structures-agency-inhouse) · [/insights/meta-ads-errors-faq](https://studio-comms.com/insights/meta-ads-errors-faq)