Milestone 4 - Facebook Ad Account Setup

This process map details how to setup your Facebook business manager. The assumption is made that you already have a working personal Facebook account. If you do not, head on over to www.Facebook.com and register now.

Note: *Your personal account is entirely separate from your business account and nobody will know that your ads are created by or associated with your personal account.*

Introduction

Advertising - the part where the "rubber meets the road" of our project. To most people, this can be a pretty intimidating process - and rightfully so! If you don't have a plan, it feels a lot like gambling. To quote a client you're "throwing money into the void". And of course, that's the last thing we want. :)

So in order to track how well our ads are doing, we need to setup our Facebook ad accounts a certain way. In the next few pages you'll find all the instructions you'll need to go from just having a normal Facebook account, to being ready to run your ads inside your new business account.

From this point forward a couple of assumptions are being made. The first is that you have a personal Facebook account that is already setup so you can confirm your identify. The second is that you have a payment method you can use to pay for your advertising. Facebook accepts most major credit cards as well as PayPal.

While I'll do my best to keep this section as up to date and relevant as possible. Facebook is always changing. The rules of advertising are timeless, but what you may find different are the interfaces or options available. In most cases Facebook will explain any changes that have happened, but if you're unsure it's usually best to defer to what Facebooks official documentation says. You'll find direct links to Facebooks setup instructions in each section. The main purpose of this guide is to help guide you through the order in which to do these tasks and offer tips and advice along the way.

Go through each section, step-by-step, and if you have any questions as you go, please reach out and let me know. And if you do run into any obstacles along the way just know that you'll only ever have to go through this process once. :)

Onward!

Part 1. Sign Up For Business Manager

The first thing we need to do is sign up for Facebook Business Manager. Facebook Business Manager - or Business Manager for short is Facebooks account for all your advertising and business asset needs. It is entirely separate from your Personal account so it allows you to run your ads anonymously.

Business Manager can also be viewed as a container for your Ad Accounts. Within Business Manager you can have multiple Ad Accounts each for a different business or brand.

Signing up for Business Manager is fairly simple if you already have a personal Facebook account. Simply log into your Facebook account and go to the following URL:

https://www.facebook.com/business

Here are the official instructions from Facebook.
https://www.facebook.com/business/help/1612355968988019

Once you've got your business setup, next we'll be creating your Facebook page, or if you already have a Facebook page, we'll "claim" it so you can use it with your new Business Manager / Ad Account.

Part 2. Creating Your Facebook Page

In order to run ads you'll need to create a Facebook Page. Your Facebook page is where people that are interested can go to learn more about your products and services. You can post (as your business) to the page to engage your audience and drive sales. But at the very minimum, it is a requirement to run your ads.

Step 1. Claim Your Facebook Page

If you've already created your Facebook page you'll need to "claim" it in the Business Manager / Ad account to be able to use it for advertising. Here are instructions on how to do that:

https://www.facebook.com/business/help/720478807965744

If you haven't already created your page, we'll need to create one in order to continue.

Step 2. Create Your Facebook Page

Like most tasks in this setup process, creating your Facebook Page isn't difficult. It just takes a little bit of time to add your text, add your images and change any settings you may want to change.

The first thing you'll need to do is actually create the page. To do that, go to https://facebook.com/pages/create.

Enter your Page Name - either your business name, or if you're operating under your own personal brand, your name. If people want to visit your page directly they'll go there by typing in facebook.com/yourpagename so choose accordingly. Choose a Page category that best represents your business. And then add a quick description that tells people what you do.

Now, while that is the bare minimum that you need in order to run your ads, it is HIGHLY recommended that you do a bit more to make your page look polished and professional. Here is a checklist of other items to modify:

1. Add a page banner
2. Add a profile picture
3. Add a call to action button
4. Add a vanity name to your page
5. Add additional info under "Edit Page Info"
6. Modify any settings under "Settings"

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The majority of these settings can be updated under "Manage Page" > Edit Page Info OR Settings.

Once your page is setup to your satisfaction, we'll need to associate your Facebook Page with your Business Manager account.

Step 3. Request Access To Your Page

If you've been the Admin of your page for less than 7 days then you'll need to follow a slightly different process to add your Facebook Page to your Business Manager. If you've had your page for more than 7 days, follow the instructions above for "Claiming Your Facebook Page". Here is how to Request Access to your Facebook Page from Business Manager:

https://www.facebook.com/business/help/183277585892925

Once your Facebook page is created and associated with your Business Manager, we'll need to create an Ad Account so we can start advertising with our Facebook Page.

Part 3. Creating Your Ad Account

Creating your Ad Account within Facebook Business Manager is a fairly straightforward process. You'll enter your business details, expense details and payment method and that's pretty much it!

As you're going through the process it will ask you to choose a currency and payment method. To make managing your ads easier use the same currency for your ads account as you do to sell your services.

Step 1. Create Your Ad Account

Start by heading over to Facebook Business Manager Settings by visiting the URL below:

https://business.facebook.com/settings/ad-accounts/

Click on the blue "Add" button and select "Create A New Ad Account" from the drop down menu.

Step 2. Choose Your Settings

Name your ad account. Select your Time zone and select your currency.

Note: *You cannot change your time zone or currency at a later date. I recommend choosing USD for your currency as our products will be sold in USD and using the same currency makes things easier to track.*

Once you're created your account, you'll be prompted to add your payment method. This can either be done at the Ad Account level or at the Business Manager level. These different levels just gives you more flexibility in how you manage your payments. This can also be easily changed afterward.

Our next steps will be Verifying Your Domain with Facebook so you can track your advertising traffic properly.

Part 4. Verify Your Domain

Verifying Your Domain proves to Facebook that you own the site. It's a requirement for tracking your ads. Thankfully it's not terribly difficult to setup and you've got multiple options.

Step 1. Verify Your Domain In Business Settings

Log into your Facebook Business Manager account. Click on Brand safety and then on Domains.

Click Add to add a new domain.

Enter in the root domain without any prefixes. For example, enter website.com, not www.website.com or https://website.com.

Click Add.

Select one of the following options to verify your domain:

Option 1: ClickFunnels: Add a meta-tag to your funnel header.

1. Copy the meta-tag you see on your Business Settings screen.
2. Log into your ClickFunnels account, go to your funnel and click on "Settings"
3. Paste the meta-tag into the "Head Tracking Code" section, and click "Save And Update Settings" at the bottom of the page.

Option 2: WordPress: Update the DNS TXT record in Cloudflare.

1. Go to www.Cloudflare.com. Login and click on your domain.
2. Go to the DNS records section on the left side.
3. Go back to your Facebook Business Settings screen and copy the TXT record in step 2.
4. Go back to Cloudflare add the TXT record by clicking "Add Record".
5. Choose the following settings: Type: TXT, Name: @, Content: Paste the record you got from Facebook.

Click Verify domain on your Business settings screen.

Once your domain is verified we need to assign it to your Facebook page.

Step 2 Assigning your Facebook page to your verified domain

The next step is to assign your Facebook page to your verified domain. This tells Facebook that your page has permission to alter the link previews because it is associated with your domain.

From the Domains page, click on your domain and click the "Add Assets" button. A window will pop up where you can select your Facebook Page. Once you've selected your page click Add. You'll now see it listed under Connected Assets.

Part 5. Adding Your Facebook Pixel

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Facebook "Pixels" are little bits of tracking code that go on your funnel pages. These bits of tracking code send information back to Facebook to determine when someone visits your site, opts in or purchases your products.

There are two parts to the Facebook Pixel code. The "Base Code" and the "Conversion Code". The "Base Code" goes on every page. It's what allows Facebook to see who is visiting your website. The "Conversion Code" tells Facebook when one of those visitors has taken an action you want to track - such as an opt in or purchase.

Step 1. Creating Your Facebook Pixel

The first thing we'll do is create our pixel code and add it to all of your pages. Here is Facebooks official documentation on how to create and setup your Facebook pixel:

https://www.facebook.com/business/help/314143995668266

First we'll go to the "Pixels" section under Data Sources in the Business Manager. Or click here:

https://business.facebook.com/settings/pixels

Click on the blue "Add" button. Then enter your Pixel Name and your website address and click Continue

Step 2. Installing Your Facebook Pixel

If you're building your offer inside ClickFunnels, copy your Facebook / Meta Pixel code and save it. Then follow the instructions on this page and choose "Method 2" All Pages to install your pixel:

https://help.clickfunnels.com/hc/en-us/articles/360006117693-Add-Tracking-Pixel

If you're building your funnel in ThriveCart you'll need to add your pixel to your ThriveCart account. Follow these instructions to add your Facebook Pixel (and Conversion API) to ThriveCart: https://support.thrivecart.com/help/facebook-pixel-tracking/

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Step 3. Updating Your Purchase Event Code

Your Facebook Purchase Code has already been setup in your ClickFunnels template. If you've changed your tripwire pricing from $6.95 to something else, the price can be updated by editing the Subscription Upsell page and going to "Settings" in the top menu and then "Custom Code" where the price can be changed under the "Footer" section.

Note: No need to do this in ThriveCart as the conversion amounts will update dynamically. However you will need to setup a "Custom Domain" in ThriveCart so that your ad data is passed back to Facebook. It is important to setup your custom domain in ThriveCart as the same domain you verified in Facebook earlier. Here are instructions on how to setup your custom domain: https://support.thrivecart.com/help/using-a-custom-domain-for-your-account/

Step 4. Verifying Your FB Pixel Setup

In order to make sure everything is setup and tracking correctly, download and install the Chrome Facebook Pixel Helper plugin available here:

https://chrome.google.com/webstore/detail/facebook-pixel-helper/

Once it is installed, visit your funnel tripwire page. Make sure the pixel fired by clicking the "Pixel Helper" icon in the menu. Then open your "Subscription Upsell" page in ClickFunnels and do the same thing. Make sure the "Purchase" event fired.

Now that everything is setup and tracking correctly, we'll move on to setting up your ads reporting so that it's easy to tell when you've got a winner and when you need to make a few changes.

Part 6. Setting Up Your Ads Reporting

Setting up your ads reporting is one of the things that makes managing and tracking your campaigns much more simple. When we run our ads we'll determine exactly how

much we can spend to acquire a Lead, an Application and a Sale. By knowing those numbers ahead of time, and organizing our reporting to give us those numbers at a glance, we're able to work with much more efficiency and confidence.

Step 1: Setup Your Ad Reporting

These are the columns that we want in our reporting.

Here is Facebooks official documentation on setting this up:
https://www.facebook.com/business/help/1452248935049010

- **Campaign Name:** Default - Name of your campaign.

- **Delivery:** Whether your campaign is active or not.

- **Impressions:** The number of people that have seen your ad.

- **CPM (Cost per 1,000 Impressions):** Cost per 1000 people that have seen your ad.

- **Link Clicks:** How many people have clicked your ad.

- **CPC (Cost Per Link Click):** How much you're paying per Link Click

- **CTR (Link Click-Through Rate):** The % of people that click your ad.

- **Leads:** The number of people that have opted in without buying.
  (*Note: Uncheck all options under "Leads"*)

- **Cost per Lead:** How much you're paying for each registrant.

- **Purchases:** The number of tripwire purchases you've had.

- **Cost per Purchase:** How much you're paying for each purchase.

- **Budget:** Your daily (or total) budget for the campaign.

- **Amount Spent:** How much of your budget you've spent

- **Date Created:** The date the campaign was created.

Step 2. Save Your Reporting Settings

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Once you've setup your ad reporting columns make sure to save your settings (or make them default) so you can easily check on your reporting without having to recreate all your columns.

Congratulations! Your ads account is now ready to start advertising. And even better news, we'll never have to go through this setup again! You've built an excellent foundation that should make running your advertising MUCH easier. From this point forward, all you have to focus on is creating your ads, checking your stats occasionally and deciding if you want to keep them running or turn them off. And we'll get into that in detail in the next section.