

Meta Business Suite Setup Checklist

Step 1: Create a Facebook Page

- Go to 'Pages' on your Facebook account.
- Click 'Create New Page.'
- Follow the steps to set up your page, including choosing a name, category, and adding a profile picture and cover photo.
- Complete the 'About' section with your business details, including contact information and a website link.

Step 2: Download Meta Business Suite

- Desktop: Visit [business. Facebook.com](https://business.facebook.com/) to access Meta Business Suite.
- Mobile: Download the Meta Business Suite app from the Google Play Store (Android) or the App Store (iOS).
- Sign in with your Facebook account credentials.

Step 3: Link Your Facebook and Instagram Accounts

- Open Meta Business Suite on your desktop or mobile device.
- Navigate to 'Settings' from the left sidebar.
- Select 'Business Assets' and click 'Add Assets.'
- Choose 'Instagram account' and log in with your Instagram credentials.
- Follow the prompts to complete the connection.

Step 4: Set Up Your Ad Accounts

- Go to 'Settings' in Meta Business Suite.
- Click on 'Accounts' and select 'Ad Accounts.'
- Click 'Add ad accounts' and follow the prompts to add an existing ad account, request access, or create a new one.
- Assign roles and permissions for team members as needed.

Step 5: Update Your Business Information

- Go to 'Settings' and select 'Business Account Info.'
- Update your business name, address, phone number, website, and other relevant details.
- Click 'Save' after making changes.

Step 6: Set Up Notifications

- Go to the 'Home' tab and click on 'Notifications.'
- Set your preferences for notifications by clicking on the three-dot menu and selecting 'Notification settings.'
- Filter notifications by priority and choose to mark them as read or unread.

Step 7: Customize Your Inbox

- Open the 'Inbox' tab in Meta Business Suite.
- Set up filters to organize messages, comments, and replies from Facebook and Instagram.
- Set up automated responses by clicking on 'Automation' and creating instant replies for common inquiries.
- Assign messages to team members if applicable.

Step 8: Explore the Planner

- Go to the 'Planner' tab.
- View your content calendar, showing all posted and scheduled content.
- Click 'Create post' or 'Create reel' to schedule new content for Facebook and Instagram.
- Use the 'Content-type' drop-down to filter posts and manage your schedule.

Step 9: Utilize Insights

- Access the 'Insights' tab to review metrics for your Facebook and Instagram accounts.
- Check audience demographics, content performance, and ad campaign results.
- Set goals and track progress to optimize your strategy.

Step 10: Set Up Monetization (If Applicable)

- Go to the 'Monetization' tab to review eligibility for monetization features like Stars and in-stream ads.
- Follow the prompts to enable monetization features and track earnings.

Step 11: Review and Save Your Settings

- Double-check all your settings, including account connections, business information, and ad account setup.
- Make sure everything is correctly configured to ensure a smooth experience with Meta Business Suite.

Final Check:

- Test the setup by creating and scheduling a post to ensure everything is functioning correctly.
- Verify that your notifications and inbox settings are capturing all messages and interactions.

This checklist is designed to help you efficiently set up and manage your Meta Business Suite account, ensuring you make the most out of its features for your business.