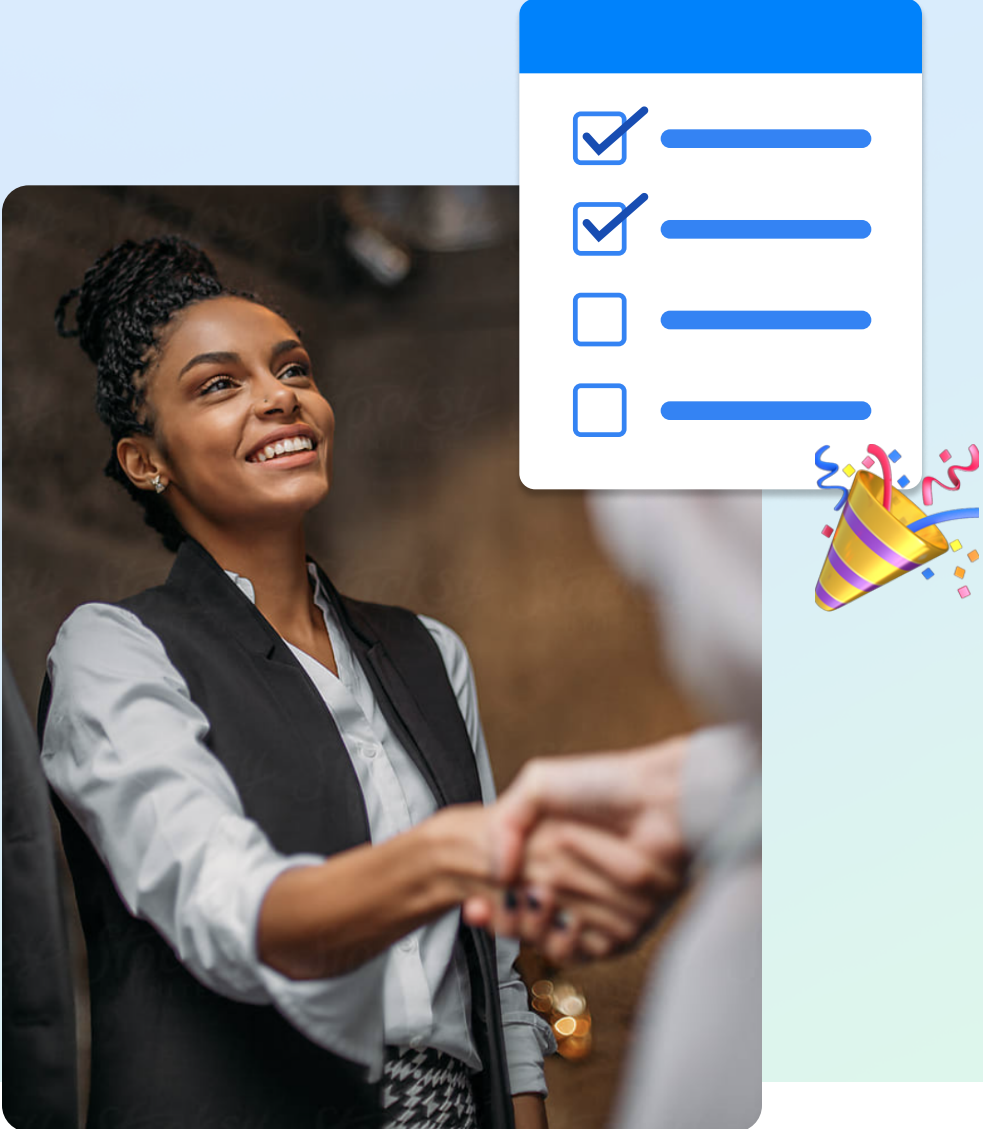


Agencies and Meta: New client onboarding checklist



Congratulations on adding a new client to your book of business! This document is meant to be used as guidance and support when starting with a new client, who may or may not have been working with another agency before yours. Below are the steps that most clients should own as they join a business.

Common client onboarding steps:

- ☐ Establish a credit line and share the connection with the agency.
- ☐ Establish ownership of assets (like pages, ad accounts, pixel), where possible.
- ☐ Assign agency partner roles within client Business Manager, with individual access to assets.
- ☐ Share assets with the agency.
- ☐ Remove former agency contacts from roles and access within Business Manager (where applicable).
- ☐ Share access to previously created campaigns with the agency, where applicable.

Below are the common setups to get access to the right client assets and avoid some common business integrity missteps and align on billing approaches. Not all of these will apply to every agency-client pairing, but they’re good to consider as you establish your relationship together with Meta.

Set-up and access steps	
User management	
Establish Business Manager admins	
☐	Add people to Business Manager
☐	Assign assets
Account employees	
☐	Add people to Business Manager
☐	Assign assets

Finance admins
☐ Add finance team member to Business Manager
☐ Assign assets
Determine system user needs
☐ Add system users to Business Manager
☐ Assign assets
Partner asset management
Confirm proper setup of Business Manager and assets
☐ Confirm the client has a Meta credit line The client's Business Manager > Business Settings > Payment Methods
☐ Share access to the credit line
☐ Confirm the client's Pages are owned in the client Business Manager The client's Business Manager > Business Settings > Pages
☐ Best practices for page management
☐ Confirm the Instagram accounts are owned in the client's Business Manager The client's Business Manager > Business Settings > Instagram Accounts
☐ How to add Instagram account to the client's Business Manager
☐ Confirm the client's pixel is owned in client Business Manager The client's Business Manager > Business Settings > Pixel
☐ Sharing controls for Meta pixel
☐ Confirm catalogs are owned by the client in the client's Business Manager The client's Business Manager > Business Settings > Catalog
☐ Assigning catalog permissions in the client's Business Manager
☐ Best practices for high-quality catalog
Setup client assets (Optional if any above do not apply)
☐ Work with the client to establish credit line
☐ Instruct the client on how to claim their Page
☐ Instruct the client on how to connect their Instagram account
☐ Instruct the client on how to create a pixel
☐ Instruct the client on how to create a catalog

Connect client Business Managers	
☐	Identify and log relevant Partner Business Manager IDs from the agency’s Business Manager
☐	Add a client-owned Business Manager(s)
☐	Select assets to get access to - Pages - Ad accounts - Catalogs - Apps - Pixels - Instagram accounts - Offline event sets - Block lists - Custom conversions - Leads access - Domains
Other considerations: Page structures, creative assets, local setups, varying lines of business	
Connect 3rd party vendor and partner Business Managers	
☐	Identify and log relevant partner Business Manager IDs from the agency’s Business Manager
Add data partner Business Managers	
☐	Assign access to ad accounts
Add vendor Business Managers	
☐	Assign access to ad accounts
Re-launching clients/campaigns (after setup and access steps are completed, not all apply to every account)	
Create new ad account	
☐	Add people and set permissions
☐	Assign partners as necessary
☐	Connect pixels, catalogs, etc. The client’s Business Manager >Business Settings > Data Sources > Select Asset >Add People > Assign

☐ Assign applicable credit line
Copy existing campaigns
☐ In existing ad account, export campaign
☐ Remove IDs from appropriate columns
☐ In new ad account, import campaign
Setup new permissions
☐ Add people and set permissions
☐ Assign partners as necessary
☐ Connect pixels, catalogs, etc. The client's Business Manager > Business Settings > Data Sources > Select Asset > Add People > Assign
☐ Assign applicable credit line
Brand safety settings
Block lists
Client-specific block lists
☐ Download client-specific block lists from current Business Manager
☐ In new Business Manager, upload block lists
☐ Apply client-specific block lists to appropriate the ad accounts
Broader block lists
☐ Download block lists
☐ In new Business Manager, upload block lists
☐ Update settings to apply Master block lists to all ad accounts
Inventory filters
☐ Apply in-stream video and instant articles settings
☐ Apply audience network settings
Allow lists
☐ Create allow lists as applicable