Meta Ads Setup Checklist

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Before you spend a single rupee on Meta ads, make sure **your business owns its own assets**: the Business Portfolio, Facebook Page, Instagram account, ad account, billing and Pixel. Freelancers and agencies should only get *access*, never ownership.

Why this matters

Think of your **Business Portfolio** as a box. Your Page, Instagram account, ad account and Pixel are the things inside it. Each asset can sit in only one box, and whoever owns the box owns everything in it.

If a freelancer or agency created the box, you may still be able to post and run ads, but **they are the owner, not you**. That is how businesses end up with a Page they can't add to their own portfolio, or a budget they can't check.

Words you will see in Meta

Term	What it means
Business Portfolio	The "box" that holds your business assets. It used to be called **Business Manager**.
Meta Business Suite	The place (business.facebook.com) where you post, reply to messages and open **Settings** to manage your portfolio.
Ads Manager	Where ad campaigns are created and tracked.
Ad account	The account your ads run from and your payment is charged to.
Pixel (Dataset)	Tracking code on your website. Meta now lists it under **Datasets** in Events Manager.
Full control	The highest access level in a portfolio (Meta used to call it "Admin").

Term	What it means
Partner	Another business (agency/freelancer) you share selected assets with. They get access, not ownership.

The 5 setups

Tick each item once it's done. Menu names are shown **in bold** exactly as they appear in Meta (labels can vary slightly as Meta updates its screens).

1. Own the Business Portfolio

The business owner creates the portfolio, not the freelancer.

- [ ] Create the portfolio from the **business owner's own login** (a Facebook profile or a managed Meta account), at business.facebook.com
- [ ] Use the business's real name, email and details
- [ ] Give **Full control** to one more trusted person (a partner, family member or senior staff), so the business isn't locked out if one account is lost
- [ ] Turn on **two-factor authentication** for everyone with access (Meta requires it for portfolios older than 90 days)
- [ ] Note down your **Business portfolio ID** (in **Settings** > **Business info**). You'll need it later

2. Put your Page and Instagram in your portfolio

- [ ] Add your Facebook Page: **Settings** > **Accounts** > **Pages** > **Add**
- [ ] Make sure your Instagram is a **professional account** (Business or Creator)
- [ ] Add Instagram to the same portfolio: **Settings** > **Accounts** > **Instagram accounts** > **Add**
- [ ] Connect Instagram to the Page. Adding both to the portfolio does not connect them automatically

If Meta says the Page is already owned by another business, jump to the next section.

3. Own your ad account and billing

- [ ] Create the ad account **inside your own portfolio**: **Settings** > **Accounts** > **Ad accounts** > **Add** > **Create a new ad account**

- [ ] Add **your own** payment method: card, or prepaid funds via UPI / NetBanking
- [ ] Add your GSTIN in payment settings if you want GST invoices
- [ ] Check spending anytime in **Billing & payments** > **Payment activity**. Every charge Meta made is listed there with a downloadable receipt
- [ ] Compare what Meta charged with what you paid your freelancer or agency

4. Give freelancers and agencies Partner access only

Never hand your Page or ad account over to someone else's portfolio. Share access from yours instead.

- [ ] Ask the freelancer/agency for their **Business portfolio ID**
- [ ] Go to **Settings** > **Partners** > **Add** > **Give a partner access to your assets**
- [ ] Enter their portfolio ID and share **only the assets they need** (for example the Page and ad account)
- [ ] Give the lowest access that lets them do the work (partial access rather than full control)
- [ ] When the work ends: **Settings** > **Partners** > select them > **Remove**. Another full-control admin may need to approve
- [ ] Also check **Page access** on the Page itself, because access given directly on the Page is separate

5. Keep your Pixel and domain in your portfolio

Only needed if you have a website.

- [ ] Create the Pixel (Dataset) **in your own portfolio** via Events Manager
- [ ] Verify your website domain: **Settings** > **Brand safety and suitability** > **Domains**
- [ ] Share the Dataset with your agency as a partner instead of letting them create it

> **Important:** ad accounts and Datasets can be *shared* with other portfolios, but their ownership **cannot be transferred**. Whoever's portfolio they were created in stays the owner. Set them up in your own portfolio from day one.

If your Page is already owned by another portfolio

Meta shows "This Page is already owned by another business" when you try to add it. Work through these steps in order.

1. **Find out which portfolio owns it.** Switch into your Page, then open **Settings & privacy** > **Settings** > **Page setup** > **Page access**. The owning portfolio's name is shown there. Meta will not show who the people behind it are.
2. **Ask the owner to remove it.** Contact the old agency, freelancer or ex-staff member. They go to **Settings** > **Accounts** > **Pages**, select your Page and click **Remove**.
3. **Request a release.** If you have full control of the Page, you can send a release request from your side. The owning business has about 30 days to respond, and if they don't act, the Page is not released automatically.
4. **Contact Meta support.** If you can't reach the owner, contact Meta Business support with documents proving you own the business (for example GST certificate, business registration, utility bill). Before a support-led release, disconnect the Page from any business Instagram account. This can take time.
5. **Add the Page to your own portfolio** once it is released. It doesn't move over by itself.

Before you hire a freelancer or agency

Ask these questions before any money moves.

- [ ] Whose portfolio will the Page, Instagram, ad account and Pixel be in? (Answer should be: **yours**)
- [ ] Will you add me as a partner, or will I add you? (You should add them)
- [ ] Whose card or UPI is the ad account charged to? (Should be **yours**, or you should at least see **Billing & payments**)
- [ ] Will I get monthly screenshots or access to Ads Manager results?
- [ ] When we stop working together, how will access be removed?

60-second final check

Check	Where to look	You want to see
Who owns my Page?	Page > **Settings** > **Page setup** > **Page access**	Your own portfolio's name
Who has full control?	**Settings** > **People**	You + one trusted person
Is 2FA on?	**Settings** > **Security Center**	On for everyone

Check	Where to look	You want to see
Whose ad account?	**Settings** > **Accounts** > **Ad accounts**	Owned by your portfolio
What did Meta charge?	**Billing & payments** > **Payment activity**	Receipts you can download
Who are my partners?	**Settings** > **Partners**	Only people you work with today

Meta renames menus from time to time. If a label looks different, search for it in the Business Suite settings search bar.