

BUSINESS PORTFOLIO OVERVIEW

A business portfolio allows organizations to bring their Facebook Pages, Instagram accounts, ad accounts, product catalogs and other business assets together, so they can manage them from one place with business tools such as Meta Business Suite and Business Manager.

Before you begin

- You must have a personal Facebook account. You'll use it to log into Meta Business Suite or Business Manager, where you can create your business portfolio.

CREATE A META BUSINESS PORTFOLIO

CREATE A BUSINESS PORTFOLIO

To create a business portfolio:

1. Go to business.facebook.com in a desktop browser. You will also use this address to log into Meta Business Suite or Business Manager.
2. Click Create an account.
3. Log into your personal Facebook account. If you don't have an account, click Create account to sign up for one.
4. Click Create an account.
5. Enter your business details.
 - Business portfolio name. It should match the public name of your business or organization, since it will be visible across Meta. It can't contain special characters.
 - Your name.
 - Business email. Meta will use this email to contact you about your business. It won't be visible to your customers.
6. Click Submit or Create to create your portfolio. You'll get an email asking to confirm your business email address.

ADDING A PAGE TO YOUR BUSINESS PORTFOLIO

Before you begin

- To add a Page to your business portfolio in Business Manager, you must have full control of the Page.
- You must have full control of the business portfolio.
- The Page you're trying to add can't be owned by another person or business.

ADD A PAGE TO A BUSINESS PORTFOLIO

To add a Page to your business portfolio in Business Manager:

1. Go to **Business settings**.
2. Select **Pages** from the **Accounts** tab.
3. Click **Add**.
4. Select **Add a Page** from the dropdown menu.
5. Enter the Facebook Page name or URL.
6. Click **Add Page**. You should see your Page on the next screen. From here you can [add people to manage this Page](#).

ADDING AN AD ACCOUNT TO YOUR BUSINESS PORTFOLIO

CREATE A NEW AD ACCOUNT

If you create a new ad account in a business portfolio, it will permanently be a part of that portfolio. This means the ad account can't be deleted or transferred from the portfolio.

- Go to **Business settings**.
- In the sidebar menu, go to **Accounts**. Then click **Ad accounts**.
- Click the **Add** dropdown menu.
- Select **Create a new ad account**.
- Enter your ad account info: ad account name, time zone and the currency you will use. Click **Next**.
- Choose the business portfolio you want to add the ad account to.
 - Select **My business** if you plan to use the ad account with your business.
- Click **Create**.
- Select the people you want to give ad account access to and assign them the permissions they need to do their work. Click **Assign**.
- Once the ad account is created and added to the business portfolio, you'll be asked to **add a payment method**.

ADDING AN INSTAGRAM ACCOUNT TO YOUR BUSINESS PORTFOLIO

Before you begin

- To add an Instagram account to your business portfolio in Business Manager, that account must be a professional account on Instagram and you must have the username and password for that account.
- The Instagram professional account you're trying to add can't be part of another business portfolio. An Instagram professional account can only be claimed by one business portfolio.
- Only people with full control of the business portfolio can add Instagram professional accounts to the portfolio.

ADD AN INSTAGRAM ACCOUNT TO YOUR BUSINESS PORTFOLIO

To add an Instagram account to your business portfolio in Business Manager:

1. Go to **Business settings**.
2. Click **Accounts**.
3. Click **Instagram accounts**.
4. Click the blue **Add** button.
5. Click **Connect your Instagram account**
6. Enter your Instagram username and password. **Note:** We may send you a security code to the email or phone number associated with the account to verify your identity.

You'll have the option to select the ad accounts and Pages you'd like to assign on the next screen. Click **Finish**. You can also click the **X** to skip this step.

CONNECT YOUR AD ACCOUNT TO THE INSTAGRAM ACCOUNT

TO CONNECT YOUR AD ACCOUNT TO THE INSTAGRAM ACCOUNT:

1. Go to Business settings.
2. Click Accounts.
3. Click Instagram accounts.
4. Select the Instagram account.
5. Click Connected assets.
6. Click Assign assets.
7. Select an ad account.
8. Click Add.

ADD PEOPLE TO YOUR INSTAGRAM ACCOUNT

Once you've added an Instagram account to your business portfolio, you can add people and assign them permissions to carry out certain tasks, such as create and manage content, manage community activity and view insights.

TO ADD PEOPLE TO YOUR INSTAGRAM ACCOUNT:

1. Go to **Business settings**.
2. Click **Accounts**.
3. Click **Instagram accounts**.
4. Click **Assign people**.
5. Select a person from the left-hand column. Then toggle on the tasks you want to grant permissions for. A blue toggle means it's on, and gray means it's off.
6. Click **Assign**.

PROVIDING ACCESS TO SMG

When another business such as an advertising or creative agency helps manage your Page, your business should still own the Page in your Business Manager. Add the other business to your Business Manager as a **partner**, then grant them access to your Page and other assets.

Before you begin

- Only people with full control of the business portfolio can add partners.

PROVIDING ACCESS TO SMG

Please provide the following information to SMG. We will then request access to all assets we need.

- **Contact name** - this person must have full control of the business portfolio
- **Contact email** (that is used to login to Facebook)
- **Business ID** - your Business Manager ID is your business ID.

To find your business ID in:

Meta Business Manager

1. Go to [Business settings](#).
2. Select Business info from the sidebar.
3. Below your business portfolio name, you'll find your business ID number.