Meta Certified Digital Marketing Associate study guide

This study guide will help you prepare for the Meta Certified Digital Marketing Associate Exam.



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Meta

Table of contents

Overview	3
Introduction to Meta technologies	6
Establish an audience for your Facebook Page	9
Connect with people on Instagram	19
Establish a business presence with Messenger	28
Connect with customers through WhatsApp Business	34
Manage your online presence with Meta Business Suite	39
Get started with advertising on Facebook and Instagram	42
Introduction to campaign objectives	57
Create audiences in Meta Ads Manager	61
Choose ad placements, budget and schedule in Meta Ads Manager	67
Set up and use the Meta Pixel and Conversions API for campaigns	76
Manage your ad campaigns	82
Privacy and data protection across Meta technologies	89
Study questions	96
Answer key	102
Glossary	105

Overview

Meta Certification can help you get noticed.
Meta Certification recognizes advanced-level proficiency with Facebook, Messenger and Instagram.

Certification is the highest level of accreditation that Meta recognizes in digital marketing.

Help boost your resume, credibility and career.
This document helps prepare you for the Meta Certified Media Buying Professional Exam. This exam measures your your ability to design end-to-end marketing strategies that align with a business goal and complement a holistic marketing plan using Meta technologies.

Find answers to frequently asked questions and learn more about Meta Certification.





Introduction to Meta technologies



Introduction to Meta technologies

People use Meta technologies—including Facebook, Messenger, Instagram and WhatsApp—to discover content that interests them, share ideas they care about and support businesses they love. Businesses can use Meta technologies to establish an online presence, attract and be discovered by people interested in what they do, build relationships and find new customers.

Establish a presence with Meta technologies

Many businesses use Meta technologies to build an online presence. Facebook, Messenger, Instagram and WhatsApp specifically can help businesses start conversations with new and existing customers, tell their brand story and share updates about their products and services with their audience.

 **Facebook**	Connect and engage with people through a Page for your business. Encourage discovery through posts, reels, events, groups, live videos and stories.
 **Messenger**	Communicate individually with people who like your Page through chats. Raise awareness of your business, connect with potential customers, manage sales and provide customer service.
 **Instagram**	Connect and engage with people using creative photo and video content. Raise awareness of your business through posts, reels, live videos and stories.
 **WhatsApp**	Communicate with customers through private texts, voice messages and video calls. Set up a digital storefront and catalog.

Engage with customers on Facebook and Messenger



Share information and updates

You can use your Facebook Page to share important information, posts and updates with your customers. This helps keep them informed about your business and what's new. You can also add personalized details to your Page to make it easier for customers to find you.

Manage your presence with Meta Business Suite

To save time and streamline your online presence, you can use Meta Business Suite to manage and schedule posts across Facebook, Messenger, Instagram and WhatsApp. We cover how to use this tool in more detail later in this training.

Engage with customers

There are many ways to engage with customers on Facebook:

- Host events, create a group or join a group.
- Use Messenger to send and receive messages (we cover how to encourage conversations through Messenger in a later module).
- Create a shop to sell products directly on Facebook and Instagram.

Sell products with Shops

With Shops, you can create a digital storefront for your business and sell products on Facebook and Instagram. This free tool enables you to customize the look and feel of your shop, add a store catalog, and manage your inventory and sales using Commerce Manager.

Get noticed with ads

Want to reach more customers? Use Meta Ads Manager to create ad campaigns that align with your business goals. You can create ads, set a budget, and choose ad placement options across Facebook, Messenger and Instagram.

Engage with customers on Instagram

Connect with your audience

With a business account on Instagram, you can showcase your business through compelling visuals, engage with your audience, inspire action and build a loyal customer base.

Explore different ways to tell your brand story

As a business on Instagram, there are many different ways that you can share content to build your presence and reach more people. This includes:

- **Posts**: Share photos and videos that showcase your products, services or company culture.
- **Stories**: Share behind-the-scenes content, sneak peeks or exclusive offers that disappear after 24 hours.
- **Live videos**: Broadcast live videos to engage with your audience in real time and share updates.
- **Reels**: Create short, entertaining videos that showcase your brand's personality.

Engage with your audience

There are also several ways to interact with your followers and build relationships:

- **Hashtags**: Use relevant hashtags in your posts to connect with people who are interested in your content.
- **Mentions**: Tag other accounts in your posts to collaborate and expand your reach.
- **Messages**: Respond to customer inquiries with personalized messages.
- **Live videos**: Engage with your audience in real time and share updates.

Sell products with Shops and product tags

If you have a shop on Facebook, you can also make it visible on Instagram so customers can browse and purchase products directly from your business account. You can add product tags to your reels, stories and posts, prompting people to purchase products in-app or from your website.

Use the professional dashboard

The professional dashboard and insights provide valuable information about how your followers interact with your content. This knowledge can help you create posts that resonate with your audience.



Build relationships with WhatsApp Business

There are many different ways WhatsApp Business can help you connect with new and existing customers worldwide.

Start conversations with short links and QR codes

After you create a business profile, make it easier for people to reach you by sharing short links and QR codes that open a chat window in WhatsApp when scanned.

Maintain conversations with quick replies, greetings and away messages

Use built-in features of WhatsApp Business to keep up with customer conversations:

- Quick replies can provide fast answers to frequently asked questions.
- Greeting messages can welcome customers to a chat.
- Away messages can let customers know when to expect a reply.

Create a catalog and collections

Share products with a catalog and collections, and make it easier for people to browse and discover things they might want to buy from your business.

Use ads that click to WhatsApp

Ads that click to WhatsApp on Facebook and Instagram help people discover your business and start a conversation about pricing or recommendations. When someone clicks on your ad, a WhatsApp chat with your business opens automatically.

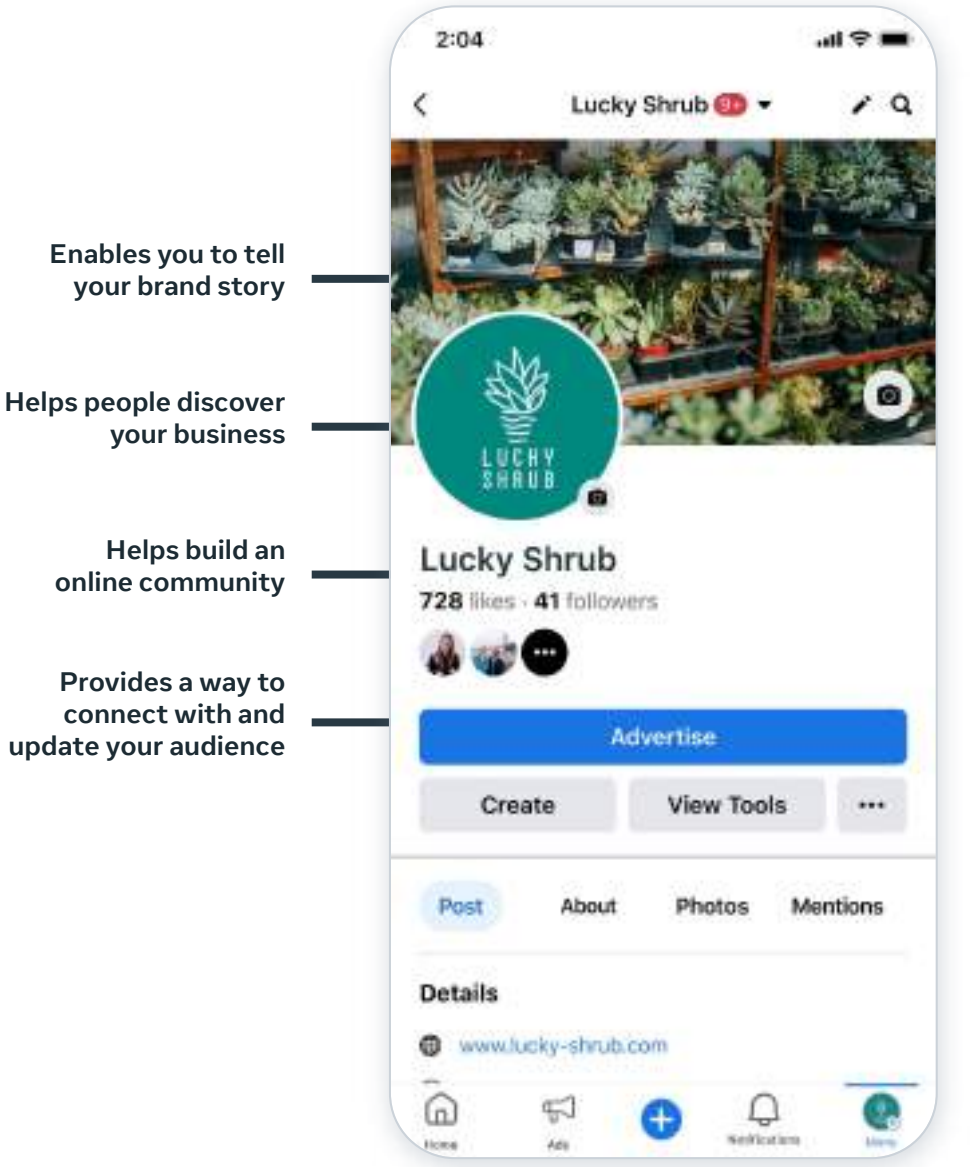
Establish an audience for your Facebook Page



Benefits of a Page

You can create a Facebook Page to help people discover your business as they explore their interests on Facebook. Unlike personal profiles, Pages serve as a source of information about your business and help you build credibility with existing and potential customers.

With a Page, you can tell your brand story, attract people with related interests, keep existing customers engaged, and create ads to reach potential customers. Additionally, a Page enables you to maintain a connection with your audience by sharing news about your business, special events, and product or service updates.



Disclaimer: Lucky Shrub is a fictitious business designed by Meta. Any similarities to content produced by real-life businesses aren't intentional.

The new Pages experience

The Pages experience has been redesigned to makes it simpler for public figures, businesses and creators to build community and achieve their objectives. Many of the same functionalities from the classic Pages experience still exist, such as creating posts and ads. However, the new Pages experience simplifies the design and includes additional functionality:

Simplified layout
The new layout has a cleaner design that makes it easier for people to find your content and engage with your business. You can also customize what gets highlighted on your Page.

Separate personal and business presences

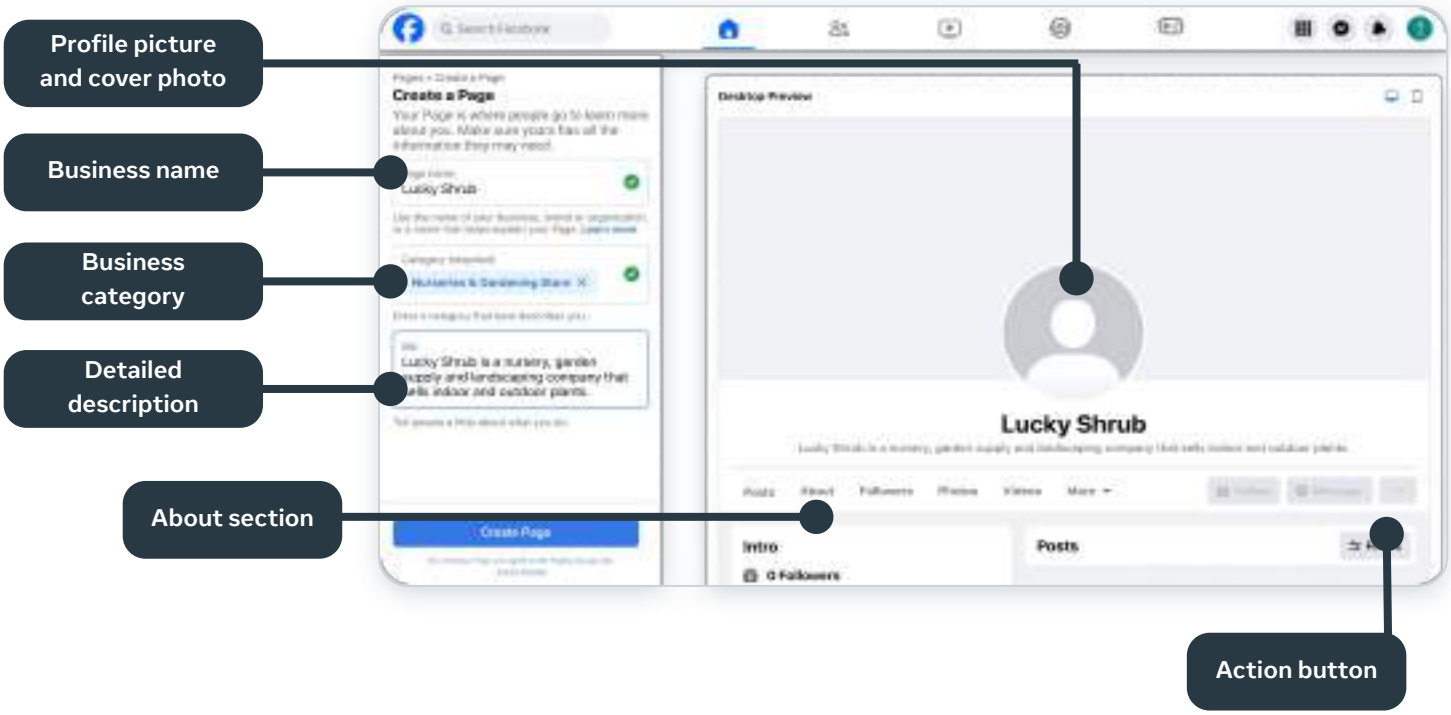
- As a Page admin, you have the ability to manage your Page and personal profile as independent entities, see separate notifications for and engage as your Page, and grant task-based permissions for Page managers.
- Having separate personal and business presences enables you to completely switch into your business presence and engage on a number of surfaces as your business.

Dedicated Page feed

- With the new Pages experiences, you have a second Feed just for your business Page. Your business Feed is also available to other people who manage your Page.
- Follow brands and topics that matter to your business directly from your Page rather than your personal profile.

Task-based permissions
You can grant access to people who manage your Page and control what level of access they have and what tasks they can manage. With task-based permissions, you can grant access to content, messages, community activity, ads and insights.

Simplified insights
You can access insights that can help you understand how your business presence is doing, tailor content that works for your customers and grow your reach.



Create a Page

Here's how to set up a Facebook Page for your business:

Steps

1. Set up a personal profile on Facebook or use an existing one to create a Page.
2. Use your personal profile to receive important notifications, set up two-factor authentication, and avoid potential misuse of your account.
3. From your personal profile, click **Pages** and then **Create a new Page**.
4. Add a business profile picture and cover photo.
5. Select a name for your Page that is the name of your business or another related term that people may search for.
6. Select the most relevant and specific category for your business to help potential customers quickly understand what your business does.
7. In the about section, include important business details such as additional contact information, store hours, website and social links.
8. To add an action button, click the three dots to the right of the **Edit** action button. Action buttons enable people who visit a Page to take actions, such as booking appointments, sending a message through Messenger or WhatsApp, or starting an order.

Key tools for your business

Once you create a Page for your business, you can explore some key tools. These tools can help you increase engagement and grow an audience for your Page.

Grow your audience with Page posts

- **Status posts**: Share quick updates with short, text-only posts.
- **Message posts**: Include a **Send message** action button to ask the people who like your Page to provide feedback or start a conversation.
- **Feeling or activity posts:** Update people who like your Page with a current mood, feeling or activity for the day.

In addition to Page posts, there are several other ways you can use Facebook to engage with current and potential customers, create meaningful experiences and connect with people around common interests.

- **Facebook Stories:** You can use Facebook Stories to share photos, videos and text that are only visible for 24 hours to the people who like your Page. This tool works well for sharing exciting news and creating authentic experiences.

- **Facebook Reels:** Reels are short-form videos up to 90 seconds with music, audio, AR (augmented reality) and other engaging effects. Reels are accessible to anyone on Facebook—not just people who like your Page—so they are a great way to help new people discover your business. You can create reels using the Facebook app.

- **Facebook Live:** Facebook Live enables you to broadcast live events, performances and gatherings. Viewers can watch from a phone, computer or connected TV. You can start a live video from a profile, Page, community or event.

- **Facebook Events:** You can use Facebook Events to organize in-person events or host online events. Online events enable people to gather virtually and enjoy premium content. Attendees may pay a fee to access events, which can help your business earn money.

- **Facebook Groups:** Groups provide people with a space to share photos and videos, have conversations, make plans and more. You can use your Page to create or join a group to connect with customers in a more private forum and have authentic conversations around shared interests.



Sell products and services

Facebook also has several tools to help businesses add value for their communities while generating revenue online. These tools can help you advertise, provide offers and manage appointments.

- **Advertising:** You can create and pay for ads through your Page to increase awareness of your business and reach new customers. There are options to promote a Page, boost a post and manage ads directly from the Page.

- **Offers:** Another option is to post discount and deal offers directly on your Page to attract customers. People who save offers will receive a notification before they expire.

- **Appointments:** You can also tell people about your services and availability, and collect and manage appointment requests through your Page. You can send reminders and confirmation messages for upcoming appointments using SMS and Messenger.

Measuring success on Facebook Pages

Once you start adding content to your Page, you can use the professional dashboard to learn more about your Page performance. The Page overview tab shows in-depth information about how people engage with your Page, including data on reach and actions taken on the Page. You can also use this tab to grow your business by boosting posts and creating ads.

The content tab contains valuable information about your posts and other types of content. You can learn more about average metrics for specific post types and see the top posts from your Page. When you click a post, you can get high-level metrics about each post you have published to help you understand which posts resonate best with people.

Page Insights

You can also access insights about your Page, audience, and posts on Facebook for mobile. From the Facebook app, tap **Professional dashboard**, then tap **See more insights** to view more details about your Page.

Audience Insights

Audience Insights helps you learn more about the types of people interacting with your Page and content, including their interests and aggregated demographic information. This can help you better understand your target audience and create content that resonates with them.

Post insights

Post insights helps you track performance metrics on your posts to better understand what content resonates with current and potential customers. By analyzing post insights, you can identify which types of content are most engaging and adjust your content strategy accordingly.



Grow your audience

Once your Page is set up, you can begin to explore different tools to increase engagement and grow an audience for your Page.

Invite people	Start by telling customers and friends about your Page. Encourage them to like and share it.
Engage regularly	Keep your Page active by posting regularly, responding to comments, answering questions, and introducing new products or services. Use the professional dashboard to track when your followers are most active and what content they engage with the most, then plan your posts accordingly.
Welcome new visitors	Pin a welcome message to the top of your Page to greet visitors. Include important information, specials and promotions to grab their attention.
Gather feedback	Encourage customers to write reviews and recommend your Page. Positive reviews can build trust and credibility, attracting more customers.
Create a group	Establish a Facebook group linked to your Page to build a community of engaged followers. This can increase your Page's visibility and attract more likes.
Share your Page	Promote your Page on your personal profile and other social media apps to let more people know about it.
Advertise	Consider boosting posts or running ads on Facebook and Instagram to reach a broader audience. This will require a budget
External sharing	Don't limit your sharing to Facebook alone. Promote your Page on your business website and marketing materials to help it reach a wider audience.

Assign Page access

As more people like your Page, you may need support managing and moderating your posts and Page. Page access enables you to give other people permission to help maintain your Page. You can decide how much control to give to each person.

	Admin	Editor	Moderator	Advertiser	Analyst
Content: manage or delete any content	X	X	X		
Messages: respond to private messages	X	X	X		
Comments: respond to, edit and delete comments	X	X	X		
Linked accounts: add, manager and remove linked accounts	X	X	X		
Ads: create, manage and delete ads	X	X	X	X	
Insights: analyze Page, post and ad insights for performance	X	X	X	X	X
Events: create, edit and delete events	X	X			
Removal and bans: remove and ban people from the Page	X	X			
Settings: manage and edit all settings	X				
Access: add and remove Facebook or task access for a Page	X				



Page access

The creator of a Page becomes an admin automatically. As we just saw, admins have full access to all features and settings on a Page and the ability to give Facebook access or task access to others who help manage the Page. You can grant Page access to people who manage your Page and give someone Facebook access with full control or partial control. Three types of control are:

Facebook access with full control
When granted full Facebook access, a person can additionally manage and edit all settings, including adding or removing access for other people and deleting the Page. People with Facebook access can switch to the Page and manage it on Facebook.

Facebook access with partial control
When granted partial Facebook access, a person can control tasks including content, messages, comments, linked accounts, ads, insights, events, removals and bans. People with Facebook access can switch to the Page and manage it on Facebook.

Task access
When granted task access, a person can control only specific tasks for a Page. People with task access manage content, messages, community activity, ads and insights. They can manage these specific tasks only from Meta Business Suite and Meta Ads Manager. This means they can’t switch into the Page or manage it on Facebook.

As your Page grows, consider the Page access and task-based permissions that best meet your business needs. You can manage Page access and task-based permissions from either a mobile device or a computer.

Connect with people on Instagram





Benefits of a business account on Instagram

People around the world come to Instagram to connect with friends, discover new interests and share what they love. Businesses of all sizes can use Instagram to attract people to their products or services, share their brand story and build relationships with customers.

New accounts on Instagram are set up as personal profiles by default. When you convert a personal account to a business account, you can run ads on Instagram to promote your products and services. You can also access free tools and features designed to help you achieve your marketing goals. These tools and features include:

- Professional dashboard and insights to better understand your audience and how your content performs.
- Tools to help customers contact your business directly.
- Features that enable customers to purchase directly from you on Instagram.

Set up a business account and profile

If you haven't created an account on Instagram, you can sign up for one and then convert it to a business account through the account settings. Once you create a business account, you can set up a profile for your business. Your Instagram account is a digital presence for your business, so consider how to represent your brand, voice and tone throughout your profile. To give visitors a good first impression, complete all the fields in your profile. To do this, go to your profile and tap **Edit profile.**



There are a few key areas of the profile to complete:

- **Create a username.**
  Choose a username that helps people recognize or easily find your business on Instagram.

- **Use a branded profile picture.**
  The profile picture should reflect your business personality and can even be your logo. Your profile picture will appear in the upper left corner of any photos or videos that your business account posts.

- **Add a business category.**
  Add a business category to help people understand what types of products or services your business offers.

- **Tell people what you do.**
  People can learn more about your business in the bio. The maximum bio length is 150 characters, so keep it brief and use keywords or emojis to attract attention.

- **Add contact details.**
  Help people reach your business by adding contact information and contact buttons to your profile.

- **Prompt people to take action.**
  Get people to do something by adding an action button to your profile. An action button enables people to take an action, such as making a reservation or booking an appointment through a third-party service, directly from the profile.

Business account features

Once you create your business account and set up your profile, you can explore several key tools and resources to help grow your presence on Instagram.

- Manage messages more easily.
  - Organize, flag and filter conversations into **Primary** and **General** to make it easier to find messages.
  - Tap and hold a response and tap **Save** to create templated responses or replies, to respond to questions more efficiently.

- Get insights about an account, its content and its followers.
  - Access insights by tapping **Insights** from your Instagram account. You can learn more about how posts, stories, reels, live videos and boosted posts perform, and use this information to make future content more effective.
  - Learn more about your business audience and which types of content they respond to most. For example, if you feature best-selling products in posts and stories, you can use insights to find out which of those posts and stories perform best.

- View the professional dashboard.
  - Create ads, set up your shop on Instagram and use saved replies to help grow your business.
  - Stay informed with tips and best practices from the @instagramforbusiness and @creators teams.
  - See how other businesses are growing and connecting with people.
  - View high-quality content from other businesses.

- Sell products.
  - Use a shop on Instagram to help people buy products directly from your Instagram business account.
  - Add product tags to posts, reels, stories and live videos so people can tap on tags to get more information, such as the names and prices of featured products.

- Use ad tools to reach more people on Instagram.
  - Create and manage ads within the Instagram app.
  - Boost a post, reel or story that you create on Instagram to turn it into an ad. When you create an ad this way, you can choose your advertising goal. Boosted content can appear in Explore, Feed, profile feed and Reels. Instagram posts that include product tags can also be boosted. For example, imagine you have an existing post that showcases the latest restock. With a business account, you can turn it into an ad and reach even more people who don't know about your business.



Connect with customers

There are many ways to engage an audience with images and videos on Instagram. Each creative format and placement presents a different opportunity to tell your business story, demonstrate how your business functions or help new and existing customers learn more about your products and services.

Posts

Share photos and videos in your Instagram posts. For multiple photos or videos, create a carousel. A carousel enables you to share up to 10 photos and videos as a single post. Posts appear in feed and on your profile. You can use posts to help people learn about your products and services.

Stories

Use Instagram Stories to share short, fullscreen, immersive content that disappears after 24 hours. You can use your story to share the authentic, human side of your business, such as behind-the-scenes footage of the team at work. You can also include interactive stickers to start conversations and learn more about your customers.

Reels

Use Instagram Reels to create multi-clip videos up to 90 seconds that can be edited with music, audio clips, special effects and other creative tools. Try to make your reels entertaining, digestible and relatable.

Live videos

Use Instagram Live to broadcast long-form live videos in an immersive, fullscreen format. This is an effective way to bring an event online, give customers something special to watch, or collaborate with another account. Start or schedule fullscreen videos that are up to four hours in duration. You can use videos to connect, inspire, educate and entertain your audience in real time.

Develop deeper connections

In addition to engaging your audience through content on Instagram, you can strengthen your connection with your customers by adopting a few practices.



Regularly share content that interests your audience.
Post consistently to establish an active presence on Instagram, provide updates about your business, and help people discover more information about your products and services.



Engage with your audience.
Ask questions in your captions. You can ask for opinions or get feedback on a product or service to help you learn more about your customers and their needs.



Show the personality of your business.
Every interaction your business has with its community is an expression of its unique personality. Because of this, it's important to be consistent with the look, feel and voice of your posts and replies.



Create a process for timely responses.
When someone sends a message to your business, respond quickly. Try to respond within 24 hours. To create quick replies to simple or frequently asked questions, tap and hold a message, then tap **Save**.



Respond and react to comments.
Respond to comments on posts regularly to help engage and grow your community. You can respond to customer comments to thank people or ask follow-up questions. If you don't have time to respond to every comment, like them instead. Likes can communicate to customers that your business is engaged.



Use direct messages for personalized support.
Move more complex or personal conversations to a private chat, where you can offer personalized customer support and schedule appointments.

Create engaging content

Create visually-striking images

As you create images and videos for your posts, stories, reels, carousels and live videos, you may notice that your community engages with some kinds of content more than others. To help people learn about your business, use creative strategies to make your content attract attention and generate as much engagement as possible.

- **Create a single focal point.**
  Crop your image or use the rule of thirds to direct attention to the most important part. The rule of thirds is a composition guideline that places your subject in the left or right third of an image, leaving the other two-thirds more open.

- **Use contrasting colors.**
  Use props or backgrounds to attract attention to your subject. You can also pair complementary colors in photos to help attract attention as people scroll.

- **Experiment with unconventional angles and perspectives.**
  Arrange objects in an intriguing way to attract attention. Photograph a product from above, choose a lower angle, get close to the subject or place it in a corner of the frame.

- **Use different filters in your story.**
  Try different filters to enhance your story. When you finish recording your story, swipe to the left of your screen to select a filter. Choose a filter that best fits your brand.







Make videos that attract attention

If you want to attract attention and grow your audience on social media, engaging video content is essential. Videos grab attention more effectively than static images or text, which makes them effective tools for storytelling and brand awareness. Engaging video content not only keeps your audience interested but also encourages shares and interactions, which can amplify your reach and attract new followers. Use the tips below to create engaging video content.

- **Keep it short and get attention early.**
  Attract attention in the first 3 seconds of your video to encourage people to stop and watch. Share the key message at the beginning so people understand the purpose of the video even if they don't finish it. Keep the entire duration of the video under 15 seconds to optimize engagement.

- **Consider how to incorporate audio.**
  For videos shown in feed, create content that works both with and without sound. Add captions so people can understand your content without sound. Use sound effects, music and a voiceover to enhance the video for people watching with the sound on. Create reels with sound effects, music and a voiceover to grab and maintain attention.

- **Shoot your video vertically.**
  Most people hold their phones vertically to view content on Instagram, so frame your video this way to make the most of mobile screens. Crop existing videos into square or vertical assets for your posts (1:1 or 9:16 aspect ratio).

- **Create a boomerang.**
  Create captivating videos that loop back and forth. This mini video provides a different viewing experience for your audience to engage with your content.

- **Try a layout.**
  Shuffle existing photos to create unique layouts and share them with others. Use layouts to keep your story interesting and authentic.

- **Add visual effects.**
  Effects can enhance your story. For example, Green Screen can help layer first-person video commentary onto existing content. Other examples of effects include syncing audio with a video, jump cuts, fast cuts and transitions.

Creative best practices

Consider the following recommendations to help you get the most value from your creative elements.

Consider the focal point.	Use creative images with one focal point. Images with product and lifestyle content can positively impact brand awareness and lower-funnel results, such as purchase intent.
Use videos.	Videos can help raise brand awareness and increase direct response outcomes. Videos most effectively prompt people to act when paired with the right ads targeting, optimization and call to action.
Optimize video ads for mobile.	Because of how people view content on mobile, try to: • Create short videos (6–15 seconds). • Grab attention quickly. • Incorporate the brand early. • Design for sound-off experiences. • Add captions or subtitles. • Build for vertical viewing.
Use a mix of creative elements.	Combine videos, GIFs, static images and other creative elements.
Optimize creative elements to help improve results.	Test your creative elements to help optimize your campaign. Optimization can also help to avoid creative fatigue.

Best practices for creative text

Consider the following best practices for your creative text:

- Incorporate branding and key message within the first 3 seconds.
- Keep ad text short and lead with value.
- Show the key message within the first few words.
- Include actionable headlines and calls to action.
- Customize ad text depending on the placement.

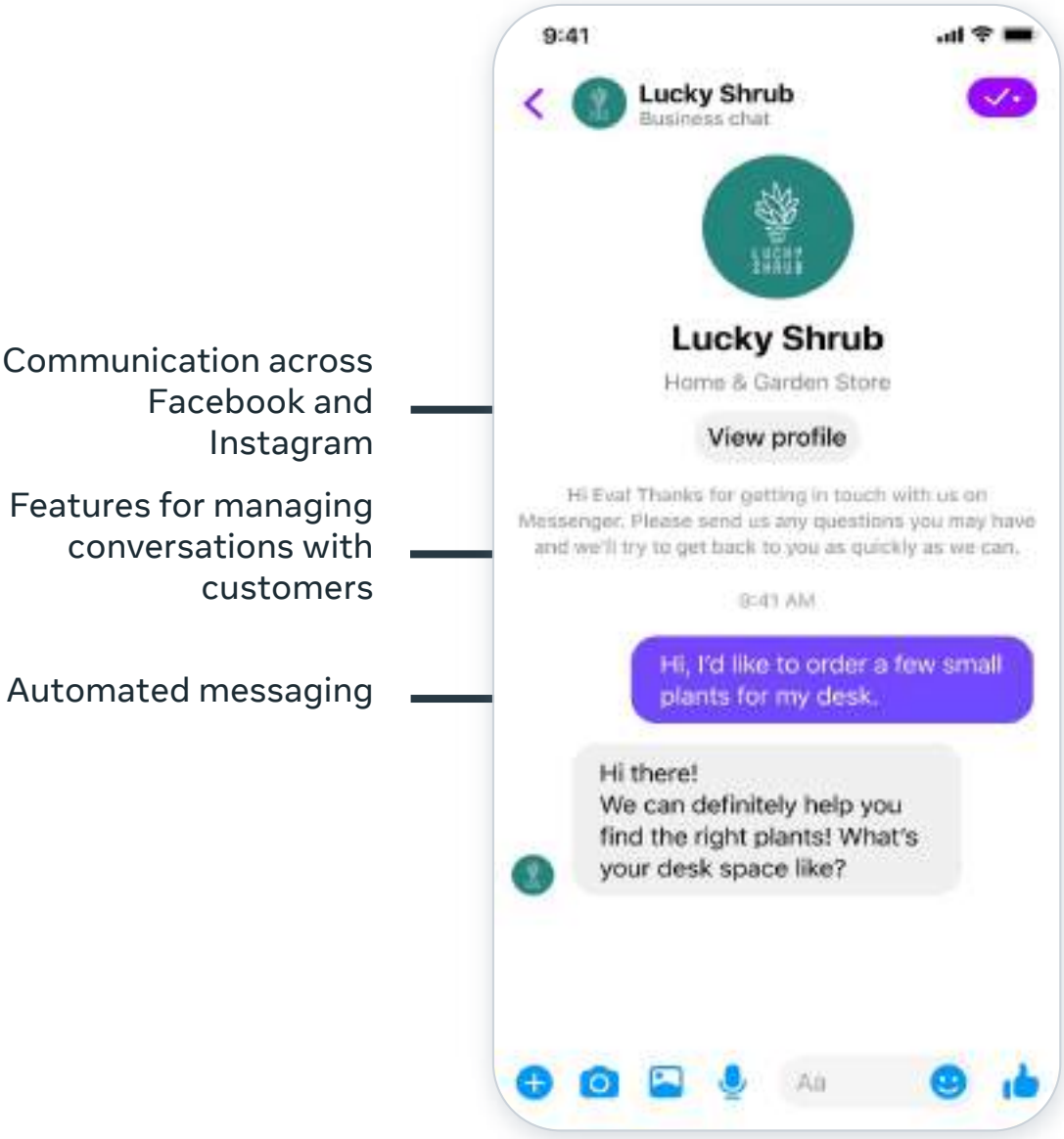
Establish a business presence with Messenger



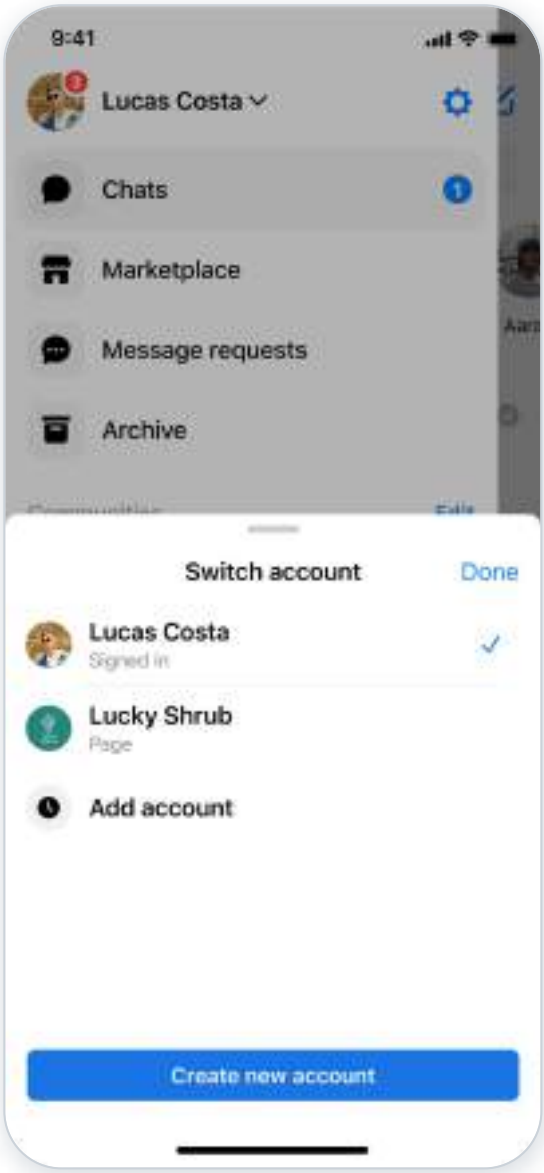
Benefits of communicating through Messenger

Whether people have questions about your products or need help with their orders, Messenger can help you communicate more quickly and effectively with new and existing customers. With features such as labels, activity and notes, you can use Messenger to manage your business conversations across Facebook and Instagram. You can also set up automated messaging to communicate more efficiently with customers, especially as your business grows.

Conversations through Messenger can help address customer needs, build trust and potentially lead to sales.



Enable new conversations through Messenger



If you have a Facebook profile, you already have access to Messenger. You can use Messenger on a computer or a mobile device. If you don't have the Messenger app installed, you'll automatically be prompted to install it.

Once you install the app, you can view the inbox for your business. If you are an admin for other Pages, you can view those inboxes as well. You can communicate with people on behalf of your business and quickly switch between your profile and Page.

To switch between your profile and a Page, follow these steps:

1. Navigate to the Messenger app.
2. Tap and hold on your profile picture in the top left corner.
3. Select the account you want to use to communicate with people.

There are many different ways you can encourage people to connect with your business on Messenger. For example, you can add an action button to your Page, include scannable QR codes on your merchandise, or place ads across Facebook and Instagram.

If you plan to use Messenger as a primary way to communicate with customers, use the action button for Messenger on your business Page. This action button enables Page visitors to start conversations quickly.

Start conversations with customers

There are several other ways to encourage more conversations through Messenger. Each method provides a unique way to connect with people and highlight your business.

M.me links

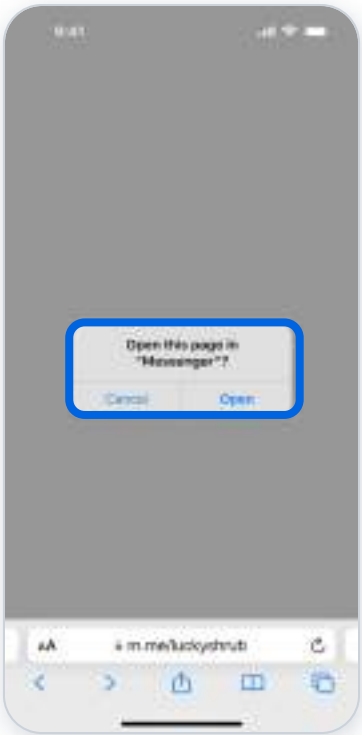
M.me links are unique URLs that are attached to your Page. When someone follows or scans them, a conversation with you is initiated through Messenger. You can embed an m.me link into a QR code and place it prominently on packaging. People can scan the links to start a chat instantly.

Ads that click to Messenger

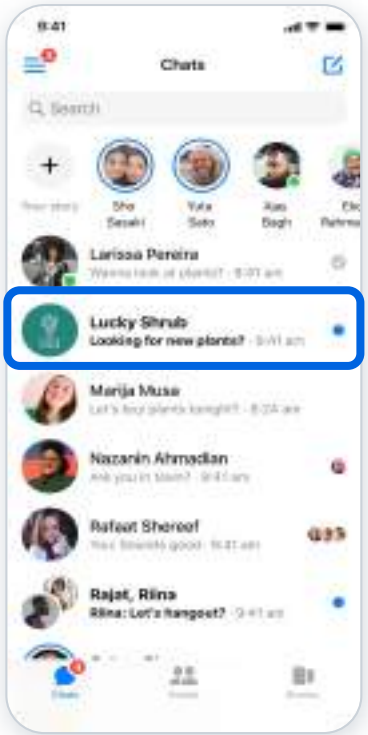
You can also create ads that click to Messenger to help increase brand awareness and reach new potential customers across Facebook and Instagram. Ads that include a **Send message** action button enable people to start conversations directly with your business. Use ads that click to Messenger to help generate leads, increase transactions, answer questions and offer support.

Sponsored messages

In certain regions, you can use sponsored messages to reengage customers who have previously messaged your business. These messages will appear in the Messenger inbox as part of an existing message thread.







Improve organization of chats

Messenger has many features that can help you manage chats with customers. These features enable you to stay organized as people go through the customer journey. Each feature is designed to help you save time and can be set up through Inbox in Meta Business Suite or Facebook Page settings.

Labels

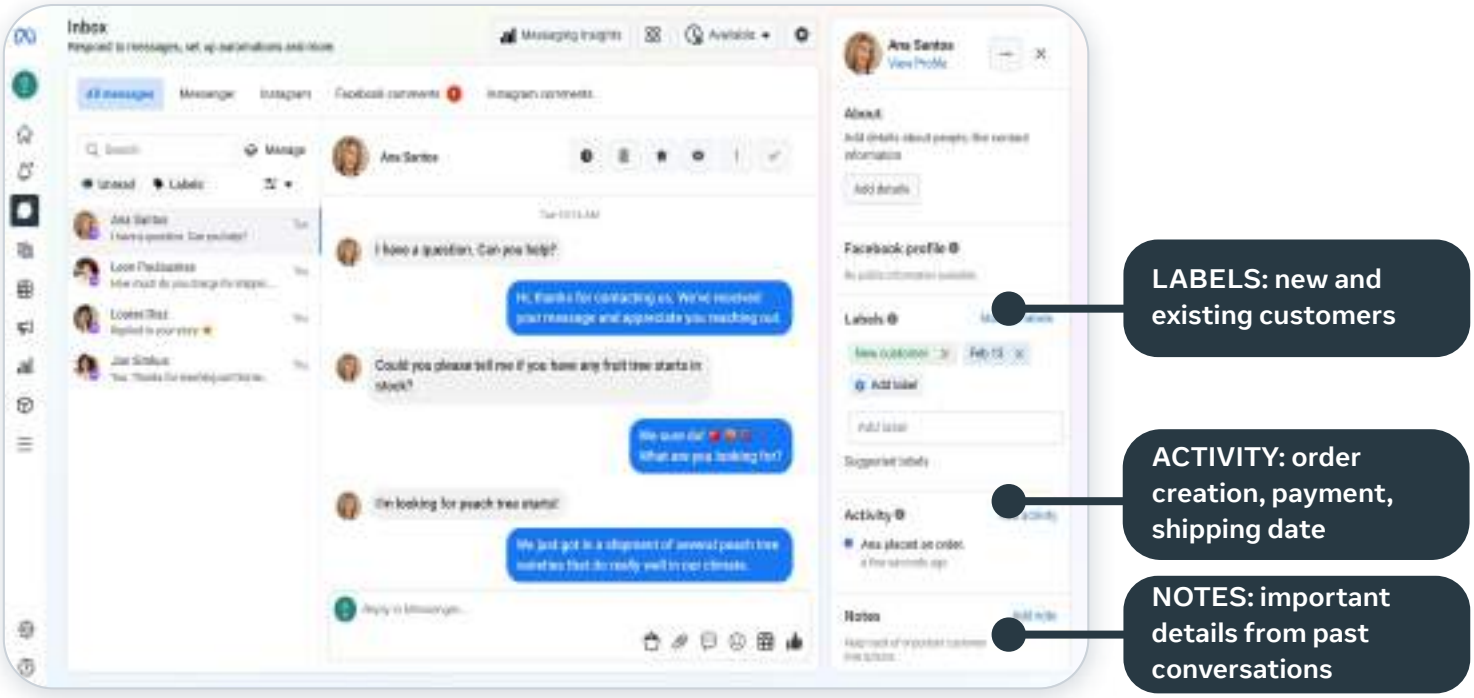
Labels can help organize chats. For example, you can use labels to differentiate between new and returning customers. You can use labels to indicate when your customers make a purchase and whether or not their orders have been processed and shipped.

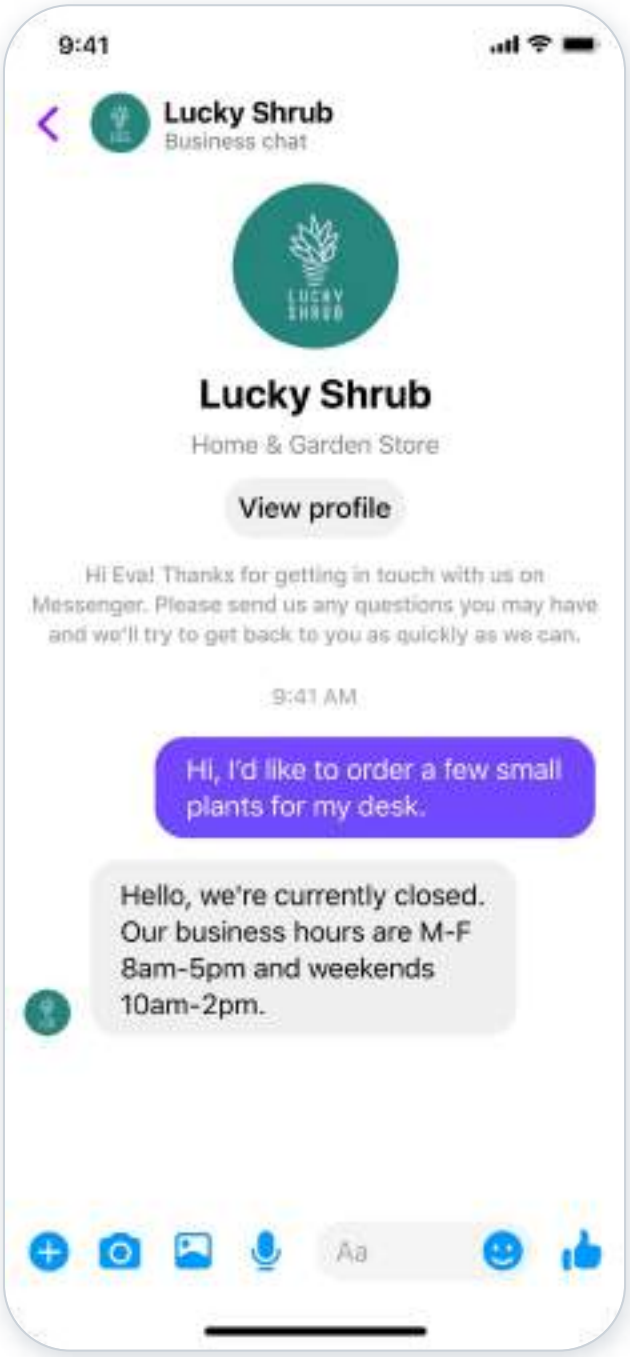
Activity

Use activity to keep track of where people are in the customer journey and share these details with them. Activities include order creation, payment and shipping. You can monitor the status of all Messenger orders through activities. Each time the status of an order changes, you can add or update the activity and send the details to the customer.

Notes

You can also keep notes for each chat. This can help you remember important details from past conversations or help personalize interactions. You can keep notes on small details for each customer, such as preferences and interests.





Improve efficiency with automated messaging

Automated messaging enables you to communicate more efficiently with customers as your business grows and messaging demands increase. Automated messaging can be set up through Inbox in Meta Business Suite.

Instant replies

- Automatic message when someone messages for the first time
- Great for greetings and basic business information

Away messages

- Automatic message when you can't respond immediately

Frequently asked questions

- Saved answers for common questions
- 3 saved replies in Messenger

Custom keywords

- Customized responses to messages with up to 5 case-sensitive keywords
- Personalizations: photos, videos, buttons, links

Connect with customers through WhatsApp Business



Connect with customers through WhatsApp Business

WhatsApp Business is a free messaging app that can help businesses communicate with their customers.

With a business profile, you can highlight products and services, answer questions, and communicate with customers. You also have the option to create a digital storefront with a catalog so you can easily share and recommend products and services through chats.

WhatsApp Business also makes it possible to manage orders, shipping and payments. Similar to Messenger, you can improve the efficiency of your communications with customers through automated messaging for greetings, away messages and quick replies.

Set up a WhatsApp Business Account:

1. Download WhatsApp from Google Play for Android or the App Store for iOS.
2. Open the app and start by verifying your business phone number. Enter the business phone number. WhatsApp will then send a confirmation code to that number.
3. Set your business name.
4. Build your profile.
    - Android: Tap three dots. Tap **Settings** and your business name.
    - iOS: Tap **Settings** and your business name.

After you create an account, make a business profile. This is where you enter important details, including the business name, category, business hours and contact information. With these details in place, you can tell customers that your business is on WhatsApp and start directing business communications there.

Once you set up your WhatsApp Business Account, consider linking it to a Facebook Page. Linking a WhatsApp Business Account and a Page enables you to use posts and ads on Facebook to send customers to WhatsApp. After you link your WhatsApp Business Account with your Facebook Page, you can also synchronize your business information across both accounts. This helps ensure that your business information stays updated and consistent for customers.

Encourage customers to interact on WhatsApp

There are several ways to reach relevant audiences, help new and existing customers find your business profile, and start new conversations on WhatsApp.

- Add an action button to a Facebook Page. Enable customers to start conversations on WhatsApp directly from your Facebook Page.

- Share short links to start conversations. Use short links (URLs that can be shared directly) to simplify customer contact without needing a phone number. Customize the default message for added context.

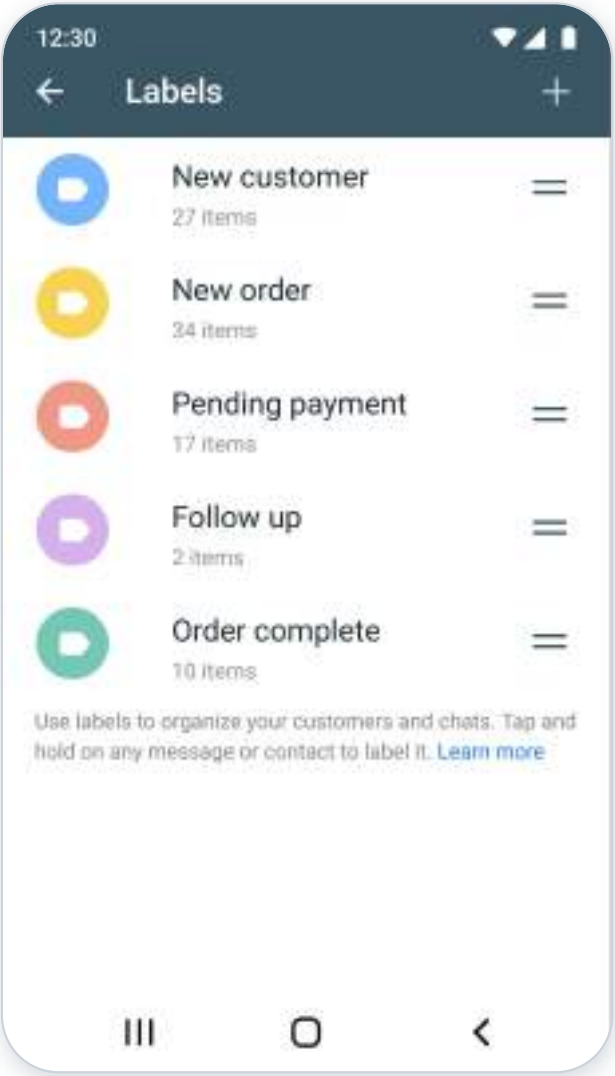
- Generate a QR code. Enable customers to start a conversation by scanning a QR code that links directly to your WhatsApp.

- Use ads that click to WhatsApp. Create targeted ads on Facebook that encourage people to start a conversation on WhatsApp, optimizing for engagement.

Manage messages with automation

Your ability to respond quickly can improve customer experiences and make your business seem more reliable and credible. With automated messaging tools, your business can stay connected with customers at any time and manage their expectations.

- Greeting messages
    - Automatic initial response to customers who send messages
    - Great for greetings and basic business information
- Quick replies
    - Replies to common questions
    - Personalization: GIFs, images and videos
- Away messages
    - Automatic message when you can’t respond immediately
- Marketing messages
    - Messages to reengage previous customers and reach new people
    - Can include offers, announcements, coupons, sales and promotions



Organize customer messages with labels

As your business grows, the volume of messages will increase. So it can be helpful to organize conversations into different categories. Labels enable you to organize messages into separate groups—such as orders, returns and customer conversations—by applying different colored labels for each.

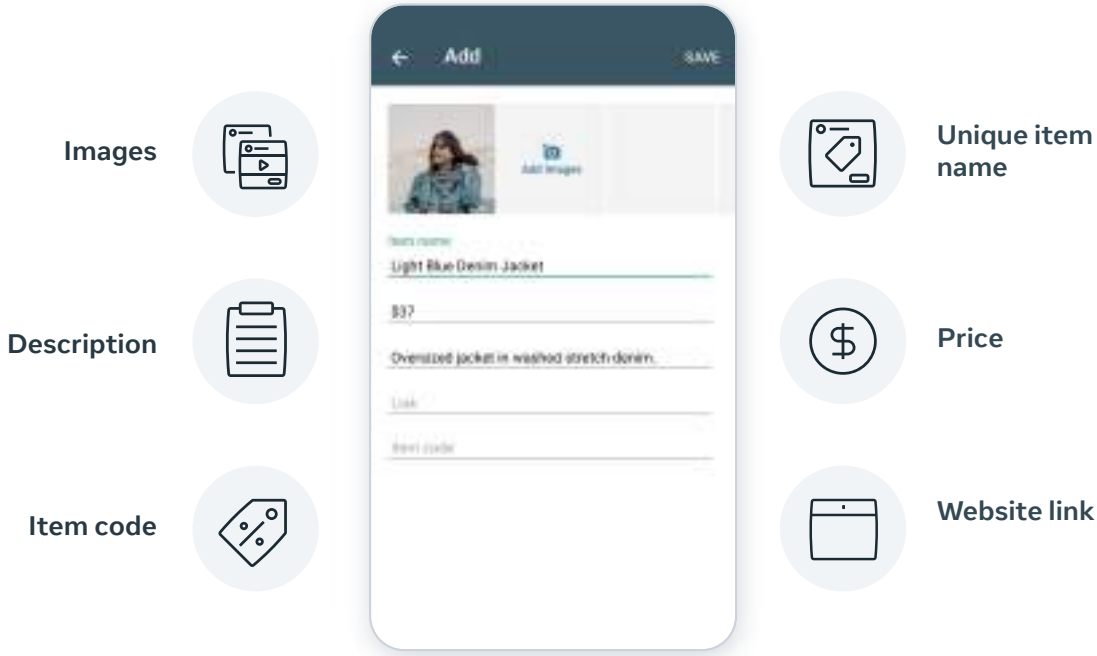
With labels, you can:

- Organize and filter important customer conversations by category.
- Quickly find and respond to messages that need your attention.
- Color-code conversations with contacts and keep track of order status.

You can create and customize your own, or use default labels such as:

- New customer
- New order
- Pending payment
- Follow up
- Order complete
- Paid
- Important
- Lead

Components of a catalog



Share products and services with a catalog

Catalogs act as mobile storefronts, and you can use them to showcase up to 500 products or services. When you use catalogs, customers can learn more about your offerings, browse, and make a purchase in one central place. They can access your catalog from your business profile or directly in a chat.

Setting up a catalog is straightforward: add an image, name, and description for each item, and optionally include price, website link, and item code to provide more details.

Catalog best practices

Keep your catalog updated.

Include relevant and accurate titles and descriptions.

Use high-quality images for your products.

Manage your online presence with Meta Business Suite



Manage your online presence with Meta Business Suite

Meta Business Suite enables you to manage your online presence across Meta technologies in one place. You can use Meta Business Suite to:

- **Get an overview of your business.**
  You can see an overview of your Page and Instagram account including updates, recent posts, and ads and insights.

- **Save time and improve efficiency.**
  You can create, schedule and publish posts, stories and reels, including text, images and videos all in one place. You can also manage your albums with the file manager to quickly access your photos and highlight specific content on your Page.

- **Plan and schedule content around important moments.**
  You can review all your published, drafted and scheduled content in one place. With the planner, you can edit and post content directly from the calendar. Use the moments feature in the planner to keep track of major holidays and other important dates for your business so you can plan relevant content.

- **Manage messages through Inbox.**
  You can use Inbox to set up automated responses, connect with customers, and view all of your messages, comments and notifications across Facebook, Messenger, Instagram and WhatsApp.

- **Analyze results and content performance.**
  You can determine which photos and videos perform best on Facebook and Instagram, and see what kind of content resonates with each audience. Then, you can use what you learn to customize future content. Go to **Insights** to get information about audience preferences, and to track metrics such as reach, engagement and reactions. You can also click on a specific post to view more detailed insights about it.

- **Manage roles and permissions.**
  You can manage settings for Meta Business Suite and all of your Facebook and Instagram accounts. Link your Facebook and Instagram accounts, update account information and manage Page roles.

Create and manage content

When you share content frequently, customers are more likely to think of your business when they're ready to make a purchase.

Meta Business Suite enables you to create, schedule and manage content across your Facebook Page and Instagram business account so you can stay connected with your followers while you focus on other business goals. You can create posts, reels and stories from both the desktop and mobile versions of Meta Business Suite.

Create and preview:

- Choose where to share.
- Select media.
- Write a caption.
- Preview your content.

Schedule, finish later or publish:

- Set a date and time.
- Save a draft.
- Or, publish immediately.

Best practices for content creation

Schedule time to create content:

- Establish a process.
- Create content regularly.

Learn what performs best:

- Identify what performs well on Facebook and on Instagram.
- Analyze reach, content interactions, audience, link clicks and minutes viewed.

Manage customer messages with Inbox

Another key feature of Meta Business Suite is Inbox. You can use your Inbox to:

- Communicate with your customers from Facebook, Messenger, Instagram and WhatsApp in one central location.
- Use labels to organize and monitor conversations with customers. Identify new and existing customers to personalize communications and help nurture relationships.
- Save time by setting up automated responses. This can help you respond to messages quickly, strengthen relationships with existing customers and connect with new people.
- You can also filter your Inbox to see unread messages and comments, and move messages and comments out of the main folder. Mark messages and comments to follow up, mark them as complete or move them to your spam folder.

Set up WhatsApp Business in Inbox

Once you've added your Facebook and Instagram accounts to Meta Business Suite, you can use Inbox to manage messages for Facebook, Messenger and Instagram. Before you set up WhatsApp Business in Inbox, make sure you're using a phone number that isn't currently associated with a WhatsApp account. Once you set up your account in Inbox, you can send messages by entering a WhatsApp phone number.

Explore automated responses

Once you have Inbox set up and the accounts you want are added to Meta Business Suite, you can start exploring features to help manage your business messaging. One key feature you can start using is automated responses. In Meta Business Suite, you can use presets to get started with automated responses. A few common presets you can try include:

- **Instant replies:** Customize an automated greeting message.
- **Away message:** Tell people when you're unavailable and when you'll get back to them.
- **Frequently asked questions:** Share information related to commonly asked questions.

As always, be sure to use best practices for messaging to enhance impact.

- Show your brand personality:
    - Establish your business's unique voice.
    - Avoid jargon and confusing phrases.
- Send a personalized message to each customer:
    - Use available customer information to inform your message.
    - Address customers by name.
- Save answers to frequently asked questions:
    - Use saved replies to write, save and reuse messages.
    - Use for questions about topics such as hours, contact details or delivery.
- Respond to people promptly:
    - Establish credibility through prompt responses.

Get started with advertising on Facebook and Instagram





Get started with advertising on Facebook and Instagram

Advertising on Facebook enables you to reach people who are not already following your Page or Instagram business account. The ads can be used to reach people who are likely to engage with them based on their location, interests and other factors. Marketing teams can create posts about their products and services on a Facebook Page to build their brands online.

To differentiate between a post and an ad:

Ads:
When businesses want to reach people who are not already familiar with their products and services, they can advertise across Meta technologies such as Facebook and Instagram. Ads appear with a **Sponsored** label.

Posts:
Businesses can create posts about their products and services on a Facebook Page to build their brands online. This content is displayed to their Page followers.

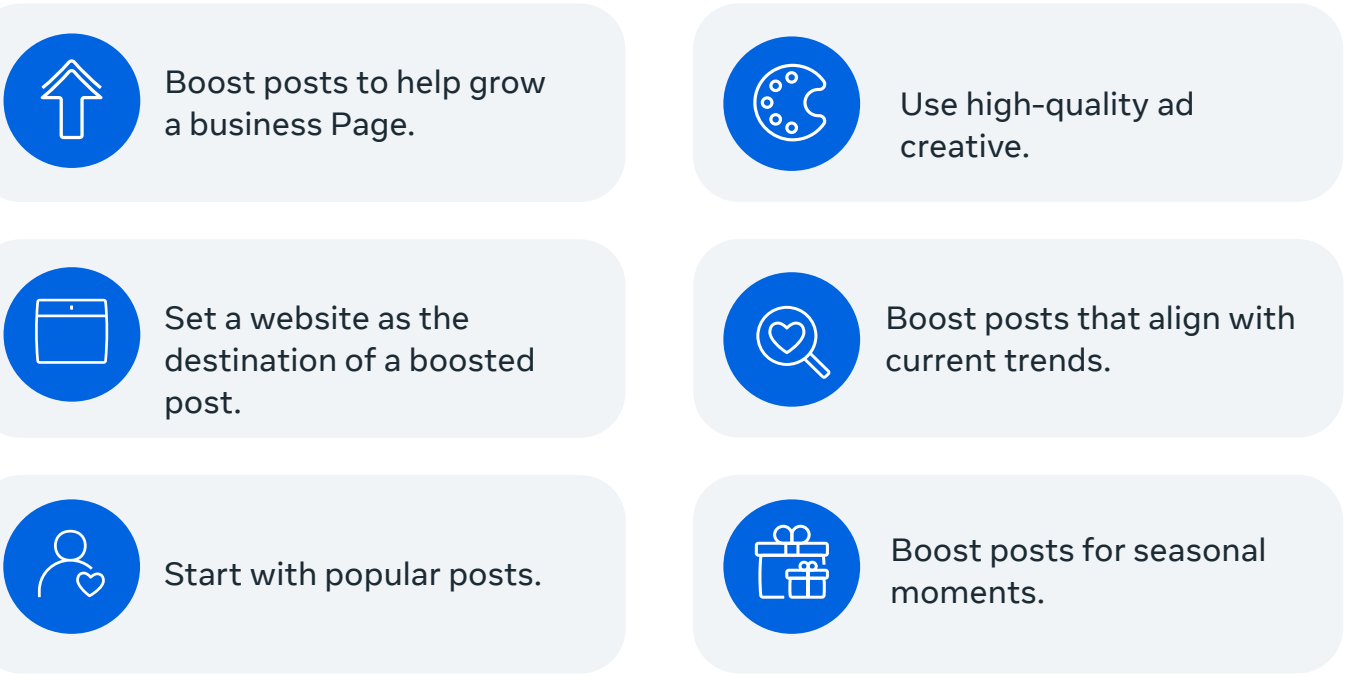
Create ads from a Facebook Page

There are several ways to advertise on Facebook. To advertise from a Facebook Page you have two options: Boost a post on your Page or create an ad by clicking **Advertise**.

Boosted posts

Boosted posts are ads you create from existing posts on a Facebook Page or Instagram account. Boosting a post can help it to receive more reactions, shares and comments. Boosted posts can also reach new people who are likely to be interested in your Page or business but don't currently follow it. Once you boost a post, it's considered an ad. For people seeing your ad, the only visual difference between an organic (unpaid) post and a boosted (paid) post is the addition of a **Sponsored** label and action button.

Tips for boosting posts



Creating ads

You can also create new ads directly from a Facebook Page without using existing posts by clicking **Advertise**. Different ad types and settings are available depending on the unique goals of your business.

Ads can help reach people who don't follow your Facebook Page or Instagram account already.

Some tips when creating ads:

- **Use a Page post.** Consider using an existing post from a business Page to build an ad with more capabilities than if you just boosted the post. You can change the image and content of the post or leave it as it is.

- **Use Facebook stock images.** If you don't have high-quality visuals to use in your ads, browse the library of stock images available.

- **Run an ad continuously with a daily budget.** This provides the ad delivery system with the flexibility to allocate money to more dynamic auctions and spend less on other days.

There are 5 things to consider when you create an ad:

- How would you like to grow your business?
- What will the message of your ad be, and how will you convey it?
- Who do you want to see your ad?
- How much do you want to spend, and for how long?
- Which account will you use to pay for your ads?

Automating ads

You can use automated ads for a simplified way to boost engagement on a regular basis. Automated ads provide a continuous plan for advertising a Page's highest performing posts on a daily budget. When you run automated ads, you can set goals and the ad delivery system will boost posts likely to perform best.

Benefits:

- Boost engagement on a regular basis.
- Set a daily budget to continuously boost a Page's highest performing posts.
- Run ads likely to perform best based on advertising objectives you choose.

Creating ads from an Instagram account

Instagram can help you connect with the customers you care about. Prepare a plan before you advertise to help you stay organized, save time and grow your business.

To create a plan:

Step 1: Establish a presence on Instagram.

Set up an Instagram business account, and create a profile that includes your contact information and other relevant details. Keep your account active with recent photos and videos so you can establish your credibility when people visit your profile from an ad.

Step 2: Set a goal.

What do you want to accomplish with advertising? Create a SMART goal: it should be specific, measurable, achievable, relevant and time-bound. For example, you can create a goal to increase your followers to 500 within the next month.

Step 3: Decide who you want to reach.

When you boost a post, you can create a target audience for it. Define your audience to make sure that the people who are most likely to become customers will see your ad.

Step 4: Create a content calendar.

A content calendar can help you plan posts and stories that you can use as ads in the future. Prewrite your captions to make sure that they work both in a post and as a future ad.

Step 5: Choose your best content.

When you select posts and stories to turn into ads, use photo and video content that’s unique to your brand and attracts people's attention. You can also use your posts and stories to create ads. Use insights to learn more about how your posts and stories perform.

Creating ads from an Instagram account

Once you select a post or story to turn into an ad, determine where the ad will direct people, who you'd like to reach, how much you want to spend, and how long you want your ad to run.

1. **Choose an ad destination.** Select where you want your ad to direct people, based on the outcome you are trying to achieve.



More profile visits:
Send people to your profile if you want them to see more of your content and follow your account. Use this option to showcase your products or services, portfolio or brand.



More messages:
Use more messages if you provide services and want to encourage potential customers to inquire about requests, appointments or consultations. If you select messages as a goal, try asking a question or starting a conversation in your caption to encourage interaction.



More website visits:
Select this option if you want people to do things like browse an online store, learn more about an event or sign up for a special offer or mailing list.

2. **Select your audience.**
In order to make your ads more successful, determine who you want to reach. You can select an automatic audience or create your own audience for your ads. An automatic audience targets ads to people similar to your followers and others who have engaged with your content before. Creating your own audience enables you to reach people based on location, age, interests and gender.

3. **Set your budget and duration.**
Your budget affects how many people will see your ad. The more you spend, the more people your ads may reach. Duration determines how long your ad will run and how it will be delivered. You can customize your budget and duration to align with a business goal or event, such as a sale or a new product launch.



Creating ads in Meta Ads Manager

Ads Manager is the starting point for running more sophisticated ads across Meta technologies. It's an all-in-one tool for creating ads, managing when and where they run, and tracking how well campaigns are performing. Ads Manager is designed for advertisers of every experience level.

Your business can use Ads Manager to manage ads and see an overview of your efforts across multiple technologies. When you see which elements of your campaigns perform best, you can adjust your ads to maximize your budget and time to achieve your business goals.

Create and manage multiple ads at once. In Ads Manager, you can edit settings, like audience, budget and placements, and create duplicates of your ads.

Track data, evaluate how well your ads perform, view up-to-date data on performance and schedule reports.

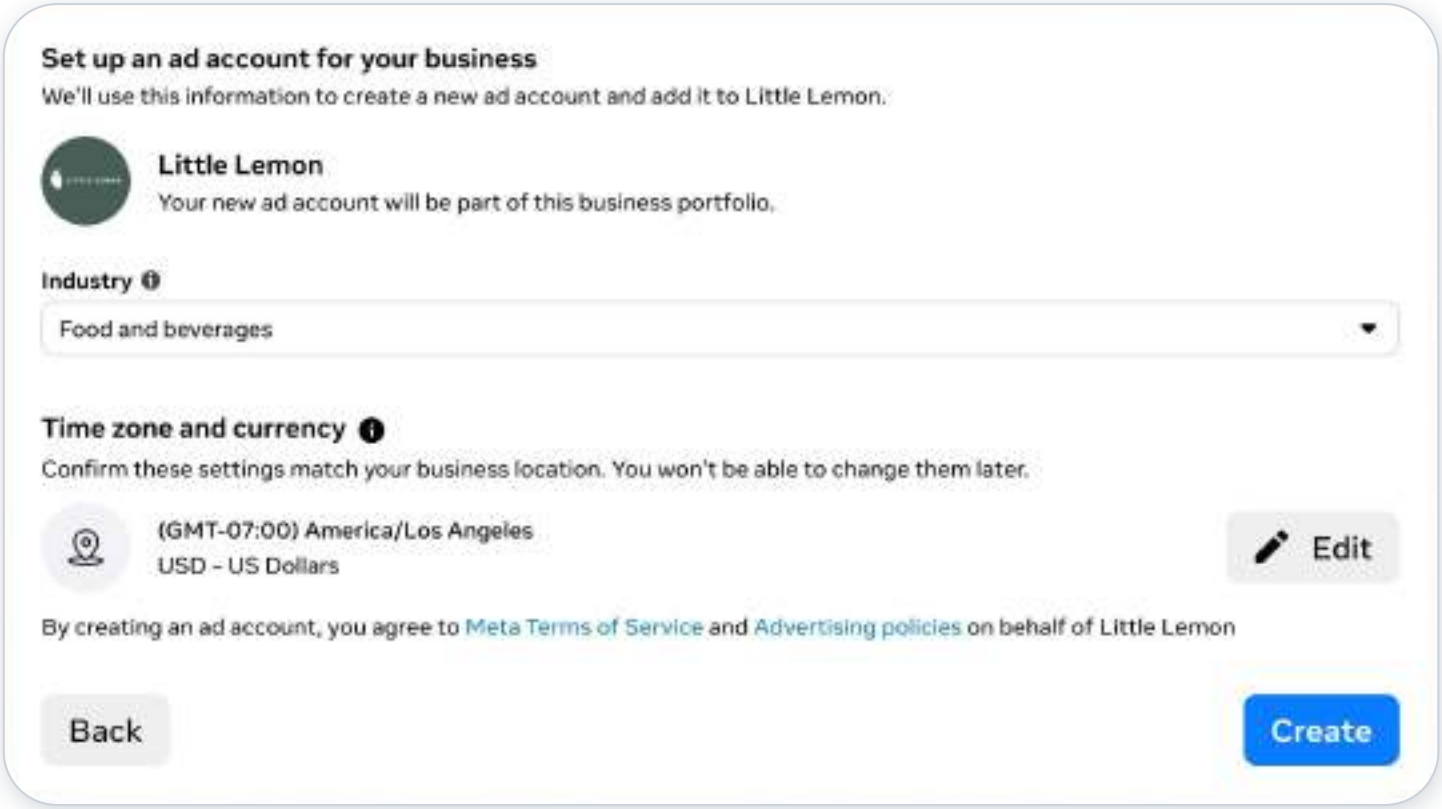
Review results at an account level. See how your campaigns are doing, apply breakdowns to see the metrics you care about, and create or schedule ad reports.

Creating ads in Meta Ads Manager

To start running ads, complete these steps.

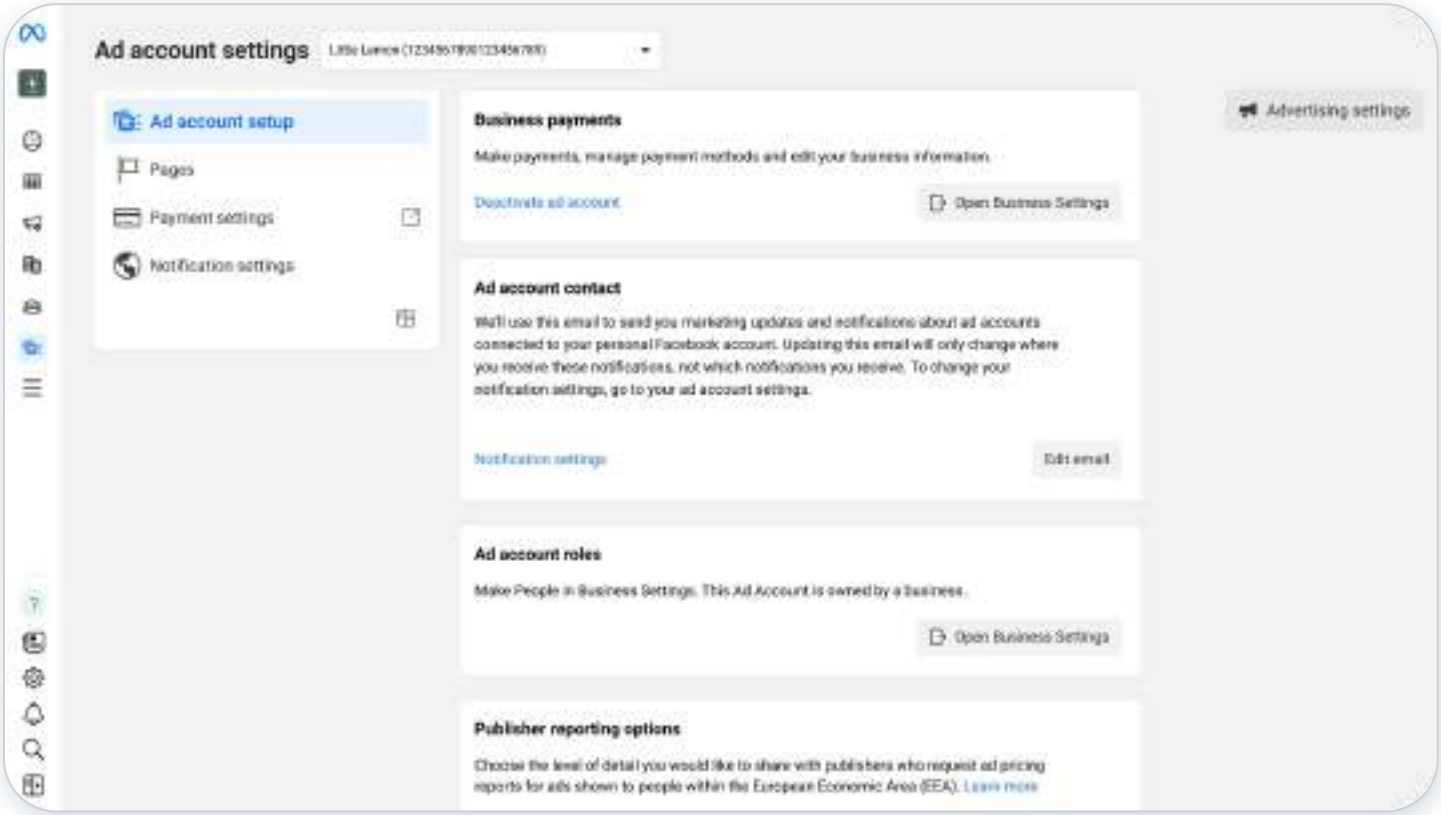
Step 1:
Make sure you have a Facebook business Page. When you Create a Page, you automatically have an Ads Manager account.

An account ID number, currency and time zone will automatically be assigned to you based on your location. You may change your currency and time zone, but doing so will set up a new Ads Manager account. Follow the pop-ups to deactivate your old account. You'll still be able to view old accounts in Ads Manager, but ads under the old account will stop running.



Step 2:

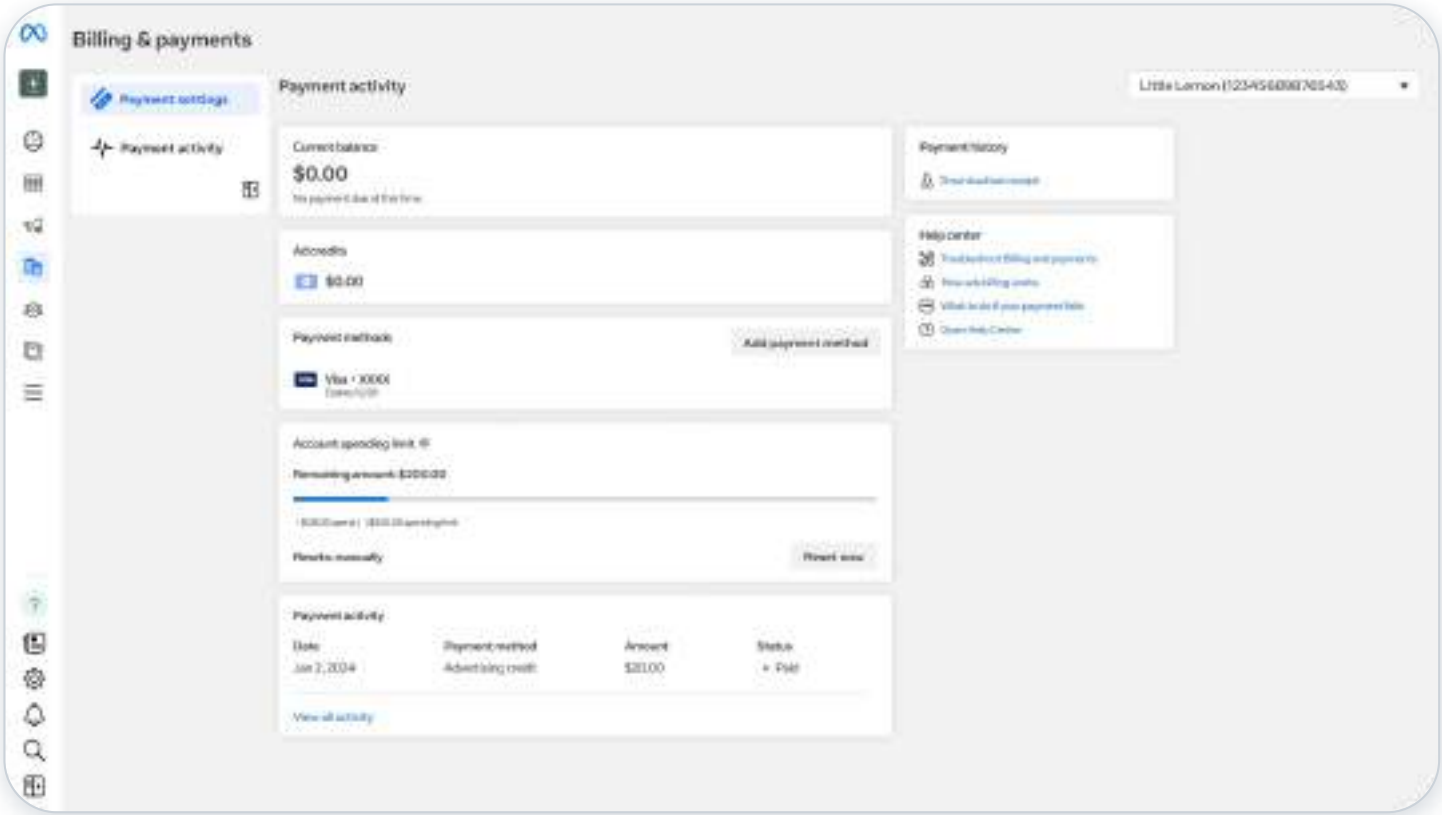
View your ad account settings to confirm your account information.



Step 3:

Click the credit card icon on the left side to access payment settings. You must enter payment settings in order to run ads. Here, you can:

- See your balance.
- Enter your payment method. You may add more than one, and you can return to payment settings to remove or change your methods at any point.
- View payment activity. You can view your payment activity per ad account.
- Confirm your business info. This section will have your business name, address and currency.





Ad creation levels:
Ads you create in Ads Manager have three parts: campaigns, ad sets and ads. Collectively, these parts are called the campaign structure. Knowing how they work together will help your ads run the way you want and reach the people most likely to be interested in them.

Campaign level

This is where you select the ad objective, or overall goal of your campaign.

Ad set level

This is where you define the audience you'd like to reach, choose your ad placements, determine a budget and set a schedule.

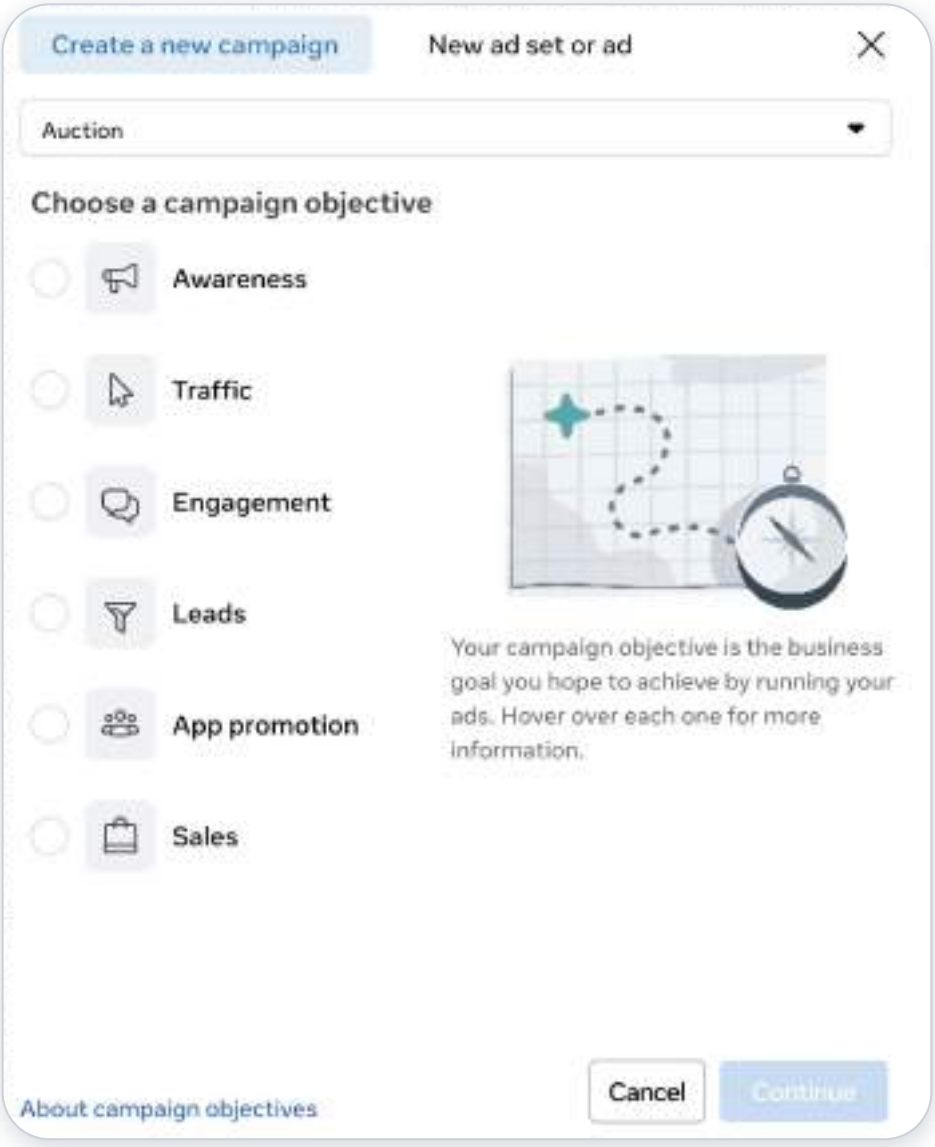
Ad level

This is where you design the ads. You can choose your ad format, upload images and video, and add text, links and more.

Campaign level:

The first level of a campaign structure is the campaign, where you choose an objective for your ad. An objective is your business goal, or what you want people to do when they see your ad. For example, you may want to increase traffic to your website or find the audience that will be most likely to purchase your product or service.

There are six objectives: awareness, traffic, engagement, leads, app promotion and sales. Depending on your objective, you may be required to set a destination for your ad. The destination is where people will be directed when they click your ad. You can set your destination to an external website, a mobile app registered on the Meta for Developers site, Messenger or WhatsApp.



Ad set level

Once you set your objective, you can start designing ad sets. An ad set is nested under a campaign, and the settings you choose on this level will influence what choices are available to you at the ad level (the last level). You can have multiple ad sets within a single campaign, which will enable you to segment the audiences you are targeting your ads to later on. You also choose placements, set a budget and choose scheduling options at the ad set level.

Placement

Placement determines where your ads will be displayed. You can decide which technology to run your ads on and whether the ads will appear in-feed, between stories, in-stream (before, during or after video content) or in-article. You can choose these manually or turn on Advantage+ placements to run ads on all available placements.

Budget and scheduling

Budget is the amount you want to spend on your whole campaign. You can also set a schedule. You can run the ad set continuously from the day you set the schedule or pick start and end dates for your campaign.

A/B Testing

You will also have the option to run an A/B test at the campaign, ad set or ad level. A/B tests enables you to change variables, such as your ad creative, audience or placement, to determine which strategy performs best and improve future campaigns.

Ad level

Ad is the final level. This is where you determine your ad creative—including visual elements such as text, images and video—and set an action button.

At this level you choose:

- Format
- Ad creative
- Languages

Meta Advantage

The tools within Meta Advantage use artificial intelligence (AI) and automation to help maximize campaign performance.

AI is core to Meta technologies and the ad delivery system. Advances in AI can help advertisers and brands create meaningful customer experiences and achieve greater performance. As a marketer, you can use your customer knowledge and expertise in ad campaigns to maximize the use of these AI tools.

With Meta Advantage, you can:

- Achieve better results with fewer, more efficient campaigns.
- Reach a wider audience of potential customers who are more likely to be interested in a business.
- Deliver a personalized customer experience that encourages people to take action.
- Save time and effort so you can focus on the overall goals of the business.

The tools within Meta Advantage can be divided into two categories: complete campaign solutions and single-step solutions.

- **Complete campaign solutions** can help you achieve campaign goals by automating every step of a campaign. You should use these solutions if you have no campaign restraints or restrictions. There are two types of complete campaign solutions: Advantage+ shopping campaigns and Advantage+ app campaigns.
- **Single-step solutions** enable you to automate one or more aspects of your campaign, such as audience, ad creative, destination, placement and budget. You should use these solutions if you have more campaign restrictions or constraints.

COMPLETE CAMPAIGN SOLUTIONS

Advantage+ shopping campaigns

Advantage+ app campaigns

SINGLE-STEP CAMPAIGN SOLUTIONS

Advantage+ audience

Advantage+ catalog ads

Advantage+ creative

Advantage+ placements

Advantage destination

Advantage campaign budget

Introduction to campaign objectives





Introduction to campaign objectives

It is important to understand how ads may help accomplish your business goals. Goals can help you focus on what you want to accomplish with your marketing efforts and track your progress over time. You may already have an idea of what you would like to achieve, but taking the time to write it down will help you later when you build ads.

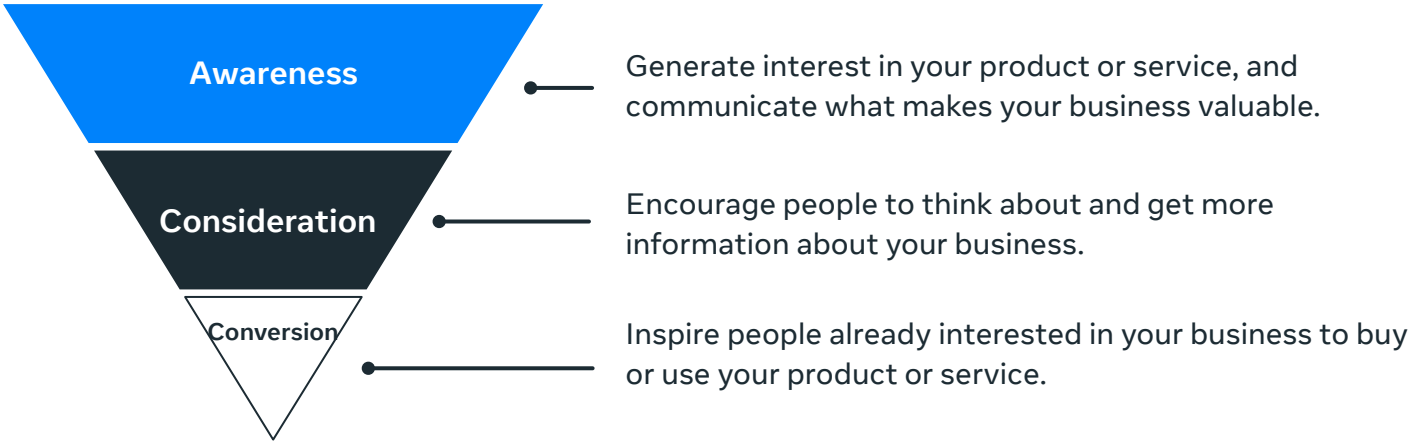
A well-defined goal is specific, measurable, achievable, relevant and time-bound.

S	M	A	R	T
Specific	**Measurable**	**Achievable**	**Relevant**	**Time-bound**

Align a business goal to an ad objective

The first step to creating ads in Ads Manager is to choose an ad objective that aligns with your business goal. An ad objective is what you want people to do when they see your ads. For example, if your goal is to increase visits to a website, you can create ads that will encourage people to click to the website. If you choose an objective that doesn't align with your goal, your ads may reach people likely to take action that's different from what you want.

The marketing funnel has three stages: awareness, consideration and conversion. As you create more ads, the goal is to move potential customers through the funnel from awareness to action. Think about where your current business goal is along the funnel to choose the best ad objective. To mirror the funnel, there are three categories of ad objectives in Ads Manager.



There are 6 campaign objectives (formerly, there were 11 objectives) to choose from across the three stages of the customer journey.

Awareness	Consideration	Conversion
Awareness	Traffic Engagement Leads App promotion	Sales

Buying types

There are two ways to buy ads across Meta technologies: auction and reservation (previously known as reach and frequency). The two buying types offer varying flexibility and predictability, and the buying type best suited to your campaign depends on your ad objective. In Ads Manager, you can determine the buying type at the campaign level.

You can choose from:

- **Auction**: Advertisers can bid for audience actions or impressions with a variety of tools that impact cost per result.

- **Reservation** (previously known as reach and frequency): Advertisers pay a fixed price to predictably reach their audience. This buying type is only available to qualified advertisers. When you purchase a campaign through reservation, you can buy it 3-6 months in advance. You also need to select an audience of at least 200,000 people.

Maintaining the campaign

Advertising is a continuous process. After you establish your business goal and gather the ad components, publish your ad. Think of it as a test, and an opportunity to learn and improve.

Once you create an ad, let it run, and monitor it. Try to allot enough time to establish a learning phase for the ad. The learning phase is the period when the ad delivery system determines what audience is most likely to be interested in your ad, the times of day to show the ad, and what placements and ad creative are most effective.

Since the learning phase occurs whenever you create a new ad set or make a significant edit to an existing ad or ad set, try not to make significant changes that will reset the learning phase. Typically, 7 days or 50 conversions are recommended to make up the learning phase of the ad. View the results of your ad campaign in Ads Manager or Facebook Ad Center and optimize your ad based on the insights you gain.



Create your campaign.

Run your campaign.

Customize, save and review reports to understand ad performance.

Refine your campaigns based on ad performance.

Create audiences in Meta Ads Manager





Create audiences in Meta Ads Manager

When advertising with Meta technologies, you can focus on finding the customers that matter most to your business. When you define an audience, you identify a group of people most likely to be interested in what your business has to offer.

To help define an audience and create effective ads, you need to understand the needs, characteristics and motivations of your customers. Defining an audience before you start advertising can increase the effectiveness of your ads and help you reach your business goals.

You can create three types of audiences in Ads Manager:

New audience

Select your audience manually based on characteristics such as age, location and interests.

Custom audience

Reconnect with people who have shown interest in your business using your customer information or data from Meta, such as video views and Facebook Page visits.

Lookalike audiences

Use customer information to find new people similar to your existing audience across Meta technologies.

Types of audiences

Let's take a closer look at the three different types of audiences.

New audiences

Define your audience manually through demographics, interests and behaviors to reach people likely to be interested in your ads. New audiences can be as broad or defined as you want. People in your new audience will share certain characteristics. These characteristics fall into four broad categories:

1. **Location:** Reach people who live in same city, country or community.
2. **Demographics:** Reach people based on aggregated, anonymized demographic data:
    - Age
    - Gender
    - Household income
    - Occupation
    - Education
    - Location
3. **Interests**: Reach people with similar interests, such as products, topics or activities.
4. **Behaviors**: Reach people with similar behaviors. For example, your audience might read the same publications, visit the same websites, have similar hobbies or play the same sports.

Custom audiences

Custom audiences enable you to reconnect with people who have already shown interest in your business. This includes people who previously visited your website or downloaded your app. You can use a variety of audience sources to create a custom audience. This can include data from Meta technologies or your own sources.

For example, using your sources, you could create an audience based on people who:

- Visited the business website. Use information from the Meta Pixel to create an audience based on actions, such as purchases.
- Used the business's app and took actions, such as launching the app.
- Interacted with the business or its catalog.
- Interacted with the business offline, such as over the phone or in-store.

You can also create an audience based on people who interacted with the business across Meta technologies. For example, people who:

- Followed or interacted with the business's Facebook Page.
- Interacted with one of its events on Facebook.
- Interacted with its Instagram account.
- Used Shops to make a purchase on Facebook or Instagram.
- Watched its videos on Facebook or Instagram.
- Interacted with its on-Facebook listings.
- Opened or completed a form from ads with the leads objective.
- Opened its Instant Experience on Facebook or Instagram.

Lookalike audiences

Lookalike audiences enable you to reach new people who are similar to current customers. Creating lookalike audiences increases the likelihood of a positive response to your ads. Here's how to create a lookalike audience:

1. **Choose a source audience**: Start by selecting a custom audience that will serve as the basis for your lookalike audience. If you have the Meta Pixel installed, you can directly create a lookalike audience without needing a custom audience first.
2. **Identify common characteristics**: Use Meta technologies to analyze demographic information and interests of your source audience. This makes it easier to identify other audiences who might be interested in your business, product or service.
3. **Create a lookalike audience in Ads Manager**: Go to Ads Manager and click **Create a lookalike audience**. Here, you can select your lookalike source. The source helps the ad delivery system find people with similar traits. Note that people in your source audience will be excluded from your lookalike audience unless you use the pixel as your source.
4. **Select audience location and size**: Choose where your lookalike audience is located and decide on the size of the audience.

The source audience you select for your lookalike audience sends information to Meta about which qualities to match. The audience size you choose during the creation process determines how closely the lookalike audience matches the seed audience. This size is expressed on a scale from 1–10, which corresponds to the percentage of the population of a particular country that you want matched with your seed audience.

A good size for a source audience is 1,000–50,000 people. The quality of the source audience is also important. For example, a seed audience of best customers could lead to better results than a seed audience comprised of all customers.

Remember:

- It can take 6-24 hours to create a lookalike audience. After that, the audience will refresh every three to seven days as long as you still actively target ads to it.
- You don't need to wait for a lookalike audience to update to use it for ads targeting.
- See the most recent updates to your lookalike audience by visiting the **Audience** tab in Ads Manager. Check the date under **Availability**.

You can use new audiences, custom audiences and lookalike audiences to find new customers and reengage existing customers with ads. In the next section, discover tips to help you create audiences for your next campaign.

Create audiences in Ads Manager

You can use Ads Manager to find new customers based on certain characteristics, get in touch with people who are already interested in your business, and reach new people similar to current customers. You can create an audience based on aggregated data about people's location, age, demographics, interests and behaviors.



Location
Reach people in cities, countries and communities.



Demographics
Reach people based on demographics.



Interest
Reach people based on categories such as fitness, fashion or specific hobbies.



Behaviors
Reach people based on their purchase habits.

You can use new audiences to segment your ads and reach the people most likely to engage with them. When you create a new audience, you can target ads in the following ways:

- **Broad targeting** means that you're mostly relying on the ad delivery system to find the best audience for your ads. This approach can lead you to potential customers you wouldn't have known about otherwise. You still have to use at least a few basic targeting parameters, but it's a good approach if you're not sure who you want to target ads to.
- **Detailed targeting** enables you to refine the group of people your ads are shown to. You can do this with information such as additional demographics, interests and behaviors.

Tips for creating an audience in Ads Manager

Segment your new audience to improve your ads. As you begin to understand how audiences interact with ads, you may notice common behaviors or attributes among certain audience segments. When you categorize different types of customers, you can customize your ads based on their experiences. For example, you can create different ads for people who have purchased products from a business and people who have not.

Tips for custom audiences:
There are a variety of sources you can use to build your custom audience:

- **Existing customer information:** When you upload existing customer information to Ads Manager, it can help find customers who engaged with the business on other platforms, such as websites and apps, and retarget ads to them.
- **Meta technologies:** You can also create custom audiences of people who interacted with the business across Meta technologies, whether it was the business's videos, lead forms, Facebook Page or Instagram account. Experiment with different sources over time to understand what works best.

Tips for lookalike audiences:

- **Use a high-quality source audience.** To build a high-quality source audience, identify a core group of the most valuable customers based on spending or repeat buying behavior. Then, upload that list into a custom audience and use it to create a lookalike audience.
- **Start small.** If you're new to lookalike audiences, start with a 1% lookalike audience and see how it performs. If you have the budget to reach more people, increase it to 2%. Continue to test this way until it's no longer cost-effective.
- **Don't use additional targeting with a lookalike audience.** Avoid the addition of other targeting parameters, such as location, age, gender or interests on a lookalike audience. The lookalike tool has already considered these characteristics, so additional targeting could limit performance.

Choose ad placements, budget and schedule in Meta Ads Manager





Choose ad placements, budget and schedule in Meta Ads Manager

When you create an ad campaign, a budget can help you assess how much money you need to spend in order to reach your business goals. An ad budget can prevent you from overspending and enable you to allocate resources efficiently. This lesson will review how to use Ads Manager to set a budget and focus on the ad set level.

Types of budget

Advantage campaign budget

This budget type makes the most efficient use of spending for the best overall results

Individual ad set budgets

This budget type enables you to set an individual budget per ad set so you have more control over how much budget is allocated to an ad set.

How you’re charged

How you’re charged for an ad depends on the ad objective you choose and is based on impressions, clicks or actions. The pricing of ads across Meta technologies is based on an auction system where ads compete for impressions based on bid and performance. When you run an ad, you're only charged for the number of clicks or impressions your ad receives. Learn more about how you’re charged.

Impressions
Get charged for every 1,000 impressions you receive on a campaign, also known as CPM (cost per 1,000 impressions). CPM measures the total amount spent on an advertising campaign divided by the number of impressions and multiplied by 1,000. Most ad objectives charge on a CPM basis.

Link clicks
Get charged for every click on an ad, also known as cost per click (CPC).

Actions
Get charged every time someone completes the action you want. This is also known as cost per result. This charge choice is only available for actions like video views.

There are two types of ad budgets to choose from in an ad set: daily and lifetime budgets. You can select each type of ad budget from the dropdown menu next to **Budget** under **Budget & schedule** in an ad set.

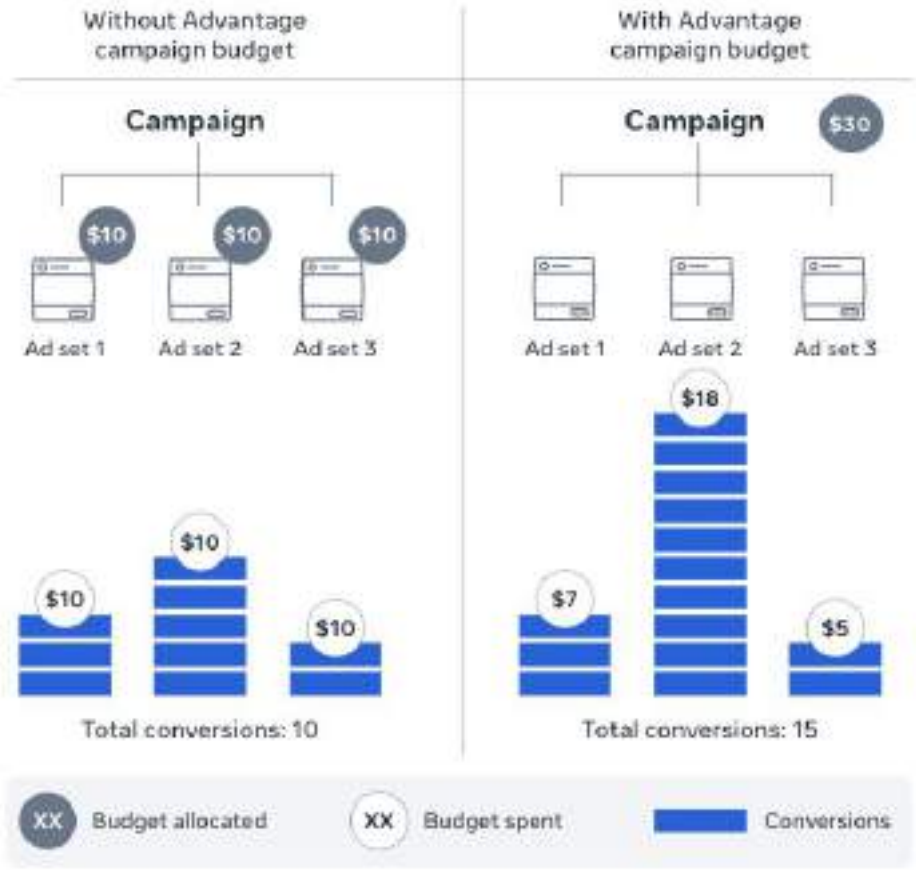
Daily budget
The average amount you're willing to spend on an ad set or campaign each day. With Ads Manager, you get roughly your daily budget’s worth of the result you optimized for. There may, however, be certain days when better opportunities are available. On those days, up to 25% more than your daily budget may be spent. For example, if your daily budget is $10, up to $12.50 may be spent.

Lifetime budget
The amount you're willing to spend over the entire run of an ad set or campaign. You won't be charged more than your lifetime budget for your ad set's results unless you change your delivery settings.

What to consider when choosing a lifetime or daily budget
A lifetime budget enables you to maximize results and keep overall costs as low as possible. A daily budget restricts how much the ad delivery system can explore opportunities across the lifetime of a campaign.

Advantage campaign budget

Advantage campaign budget enables you to set a single campaign budget that automatically allocates funds in real-time to the most promising ad sets throughout your campaign. This ensures your budget is spent on the best performing ad sets.



Setting a schedule for your ad:

- **Budget and schedule:** After setting your ad set budget, you can schedule specific start and end dates and times for when your ads will run. This feature is available with both ad set level budgets and Advantage campaign budget.
- **Advanced scheduling:** Align your ad schedule with business events, promotions, or other significant dates. You can also set ads to run in specific time zones, tailoring your campaign to the location of your audience.
- **Strategic timing:** Consider running ads at specific times of day or days to target optimal engagement, such as promoting morning products or increasing awareness before an event.

How to choose ad placements in Ads Manager

Choosing ad placements relevant to your audience will help you to reach people where they spend the most time.

Depending on the objective you choose when you create your campaign, your ads can appear across Facebook, Messenger, Instagram and Meta Audience Network. Placements are available within the apps and are determined by your ad type and settings. Not all placements are available for every ad. In the next two slides we will cover available placements.

Each placement has different benefits, so it's up to you to decide which strategy is most effective.

- **Feed**: Get high-visibility for your client or business with in-feed ads.
- **Stories and reels**: To tell a visual story with immersive vertical ads, choose story ads and Reels ads.
- **In-stream ads for videos and reels**: Reach people before, during or after they watch a video or reel.
- **Search results:** Place your ads next to relevant Facebook and Marketplace search results.
- **Apps and websites**: Your ads can appear in external apps and websites.
- **Messages**: Send offers or updates to people who are already connected to your business.

Advantage+ placements put your ads where your customers are

Advantage+ placements use AI to place your ads where potential customers are most likely to convert by finding the most cost-effective opportunities across Meta technologies. Advantage+ placements enable the ad delivery system to efficiently use your budget and increase your ad exposure. Your ads can be seen on all placements available for your settings including Facebook, Messenger, Instagram and Meta Audience Network.

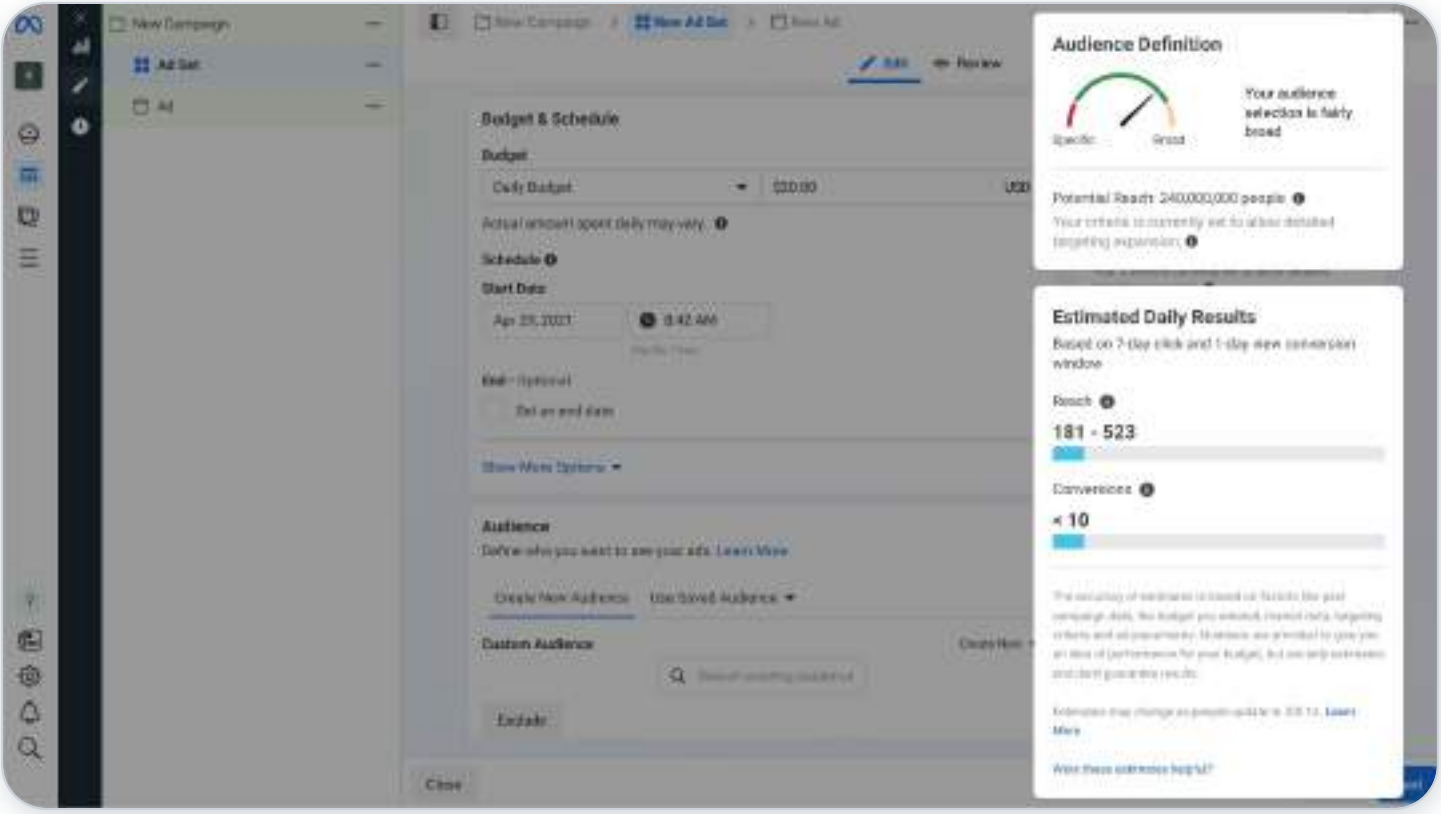
Manual placements let you choose the technologies and placements where you want ads to appear. If you choose manual placements, select several different placements.

Improve ad delivery

When you're setting up a campaign, first refer to the two sections in the ad creation flow, known as potential audience reach and estimated daily results.

Potential audience reach
This shows an estimate of how many people you can reach based on your audience definition and placements. It helps you understand if your audience is too broad or too specific. A well-defined audience balances specificity with sufficient reach potential. For example, a broad audience might reach up to 2 million people. Increasing your budget can further expand this reach.

Estimated daily reach and results
These estimates vary with your budget and are crucial for setting financial expectations. They are available for various campaign objectives like app installs, event responses, and more. A higher budget typically increases both reach and results. If the full budget isn't spent, these estimates may be lower in confidence.



Adjustments to improve your ad

If your ads are not reaching the desired audience, you can try to adjust variables in your ad campaigns to get different results. Use insights from ad performance to adjust future ads and prompt different outcomes.



Budget
Increase the amount you're spending to reach a larger audience or reduce spending to achieve a different cost per result ratio.

Advantage
If you've selected the Advantage campaign budget setting, don't manually pause and unpause your ads. Advantage campaign budget reserves and spends your campaign budget on active ad sets, and pausing an ad set removes it from consideration.

Placements
Change your placement options to see which ones yield the best results, or try Advantage+ placements if you haven't been using them.

Running ads
If you scheduled your ads to run at specific times and aren't getting the results you hoped for, try to let them run continuously. This way, you'll get more results in the times you hadn't scheduled.

Customize ad creation in Meta Ads Manager

Depending on the objective you choose when you create your campaign, your ads can appear across Facebook, Messenger, Instagram and Meta Audience Network. Available placements are determined by your ad type and settings. Not all placements are available for every ad.

Ad formats

When you create ads in Ads Manager, you also decide what your ads will look like. Ad creative may appear differently—and communicate different messages to an audience—depending on format and placement. When you choose an ad format best suited to your business goals, you can use your marketing budget most efficiently.

Choose the ad format that aligns closely with your business objective and the assets you have available. You can also use multiple formats to enhance your campaign performance.

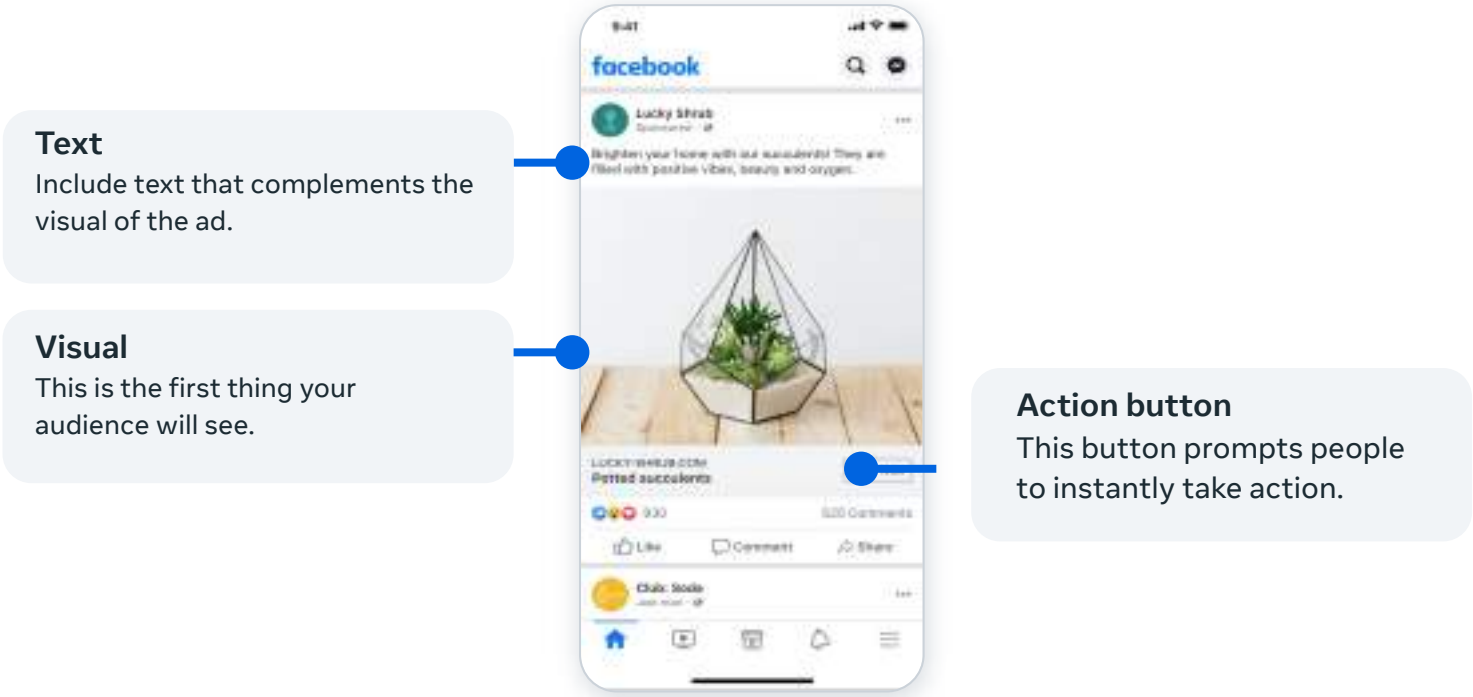
- **Image ads:** Convey simple, straightforward stories about your business or brand. Suitable for all objectives.
- **Video ads:** Attract attention with motion and sound. Ensure videos are short and engaging. Suitable for all objectives.
- **Carousel ads:** Showcase different products or tell a cohesive story through multiple images or videos in a single ad. Each piece can have its own headline, description, link and action button.
- **Slideshow ads:** Create video-like ads with motion, sound and text. These are lightweight and effective across devices and connection speeds. Ideal for reaching audiences in emerging markets with slower internet connections.
- **Collection ads:** Offer a visual and immersive shopping experience with a cover image or video and multiple products underneath. Tapping the ad opens a fullscreen Instant Experience that enables people to browse and purchase up to 50 products instantly.

Creative best practices for ads

- **Select an ad format based on your business goal:** The objective you choose will help you determine which ad formats work best to achieve a particular business goal.
- **Customize the ads to the audience:** Choose an ad format based on what customers want to experience when they interact with your business. You can test different formats to see what works best.
- **Review how different placements look:** Once you select your ad creative, you can see how the ad will look. Different visuals may be more appealing in different formats.

Set up ad creative

There are three creative elements of an ad: text, visual and action buttons.



Ad setup

Once the ad creative is complete, it's time to set up the ad. Consider the following before ad setup:

- **Ad format:** Select a format that aligns with the business goal.
- **Ad creative:** Choose a visual that can grab your audience's attention.
- **Primary text:** Write a caption that complements the ad creative.
- **Placements:** Make sure to check how the ad looks in different placements.

Writing great ad text

Your ad text and visual should complement each other. Use the following suggestions to make sure your text and visual work well together:

- Tell a story.
- Use hashtags.
- Speak directly to your audience.
- Be consistent.
- Create a sense of urgency.

Set up and use the Meta Pixel and Conversions API for ad campaigns





Set up and use the Meta Pixel and Conversions API for ad campaigns

Data sources like the Meta Pixel and Conversions API are Meta Business Tools that can help optimize your ad spend by measuring customer actions and information provided by customers. You can use this information to understand the results of your ads, build custom audiences and advertise to different segments of website visitors based on their actions.

- Reach selected audiences.
- Optimize ads to reach people most likely to take action.
- Measure campaign effectiveness.

Meta Pixel

The pixel is a piece of code you can place on your website to understand how people use and interact with it.

The pixel has two elements:

- Pixel base code: Monitor specific actions and events that occur on your website.
- Pixel events: Measure specific actions on different pages of your website to determine where and how many conversion events occur.

To use the pixel, make sure that your website domain is verified. Website verification helps your business maintain control over the desired web events your pixel uses for optimization, targeting and reporting. Learn more about how Aggregated Event Measurement may affect the pixel.

The Meta Pixel can support your marketing in the following three ways:

- **Show your ads to people likely to be interested in them.** Find new customers, or people who have visited a specific page or taken a desired action on your website.
- **Help increase sales.** Set up automatic bidding to reach people who are more likely to take an action you care about, like making a purchase.
- **Measure the results of your ads.** Better understand the impact of your ads by measuring what happens when people see them.

The pixel logs when someone takes an action on your website, such as adding an item to a shopping cart or making a purchase. The pixel receives these actions, or events, which you can view in Meta Events Manager. From there, you can see the actions that your customers take. You also have the option to reach those customers again through future ads across Meta technologies.

Step 1: People visit your website.
Step 2: The pixel activates when those people take actions on your website, such as clicking on a web page or making a purchase.
Step 3: The pixel uses hashed information to match those people with people who use Meta technologies.
Step 4: You can now measure the direct impact ads have on website conversions and use this information to reengage your audience later.

Add the Meta Pixel

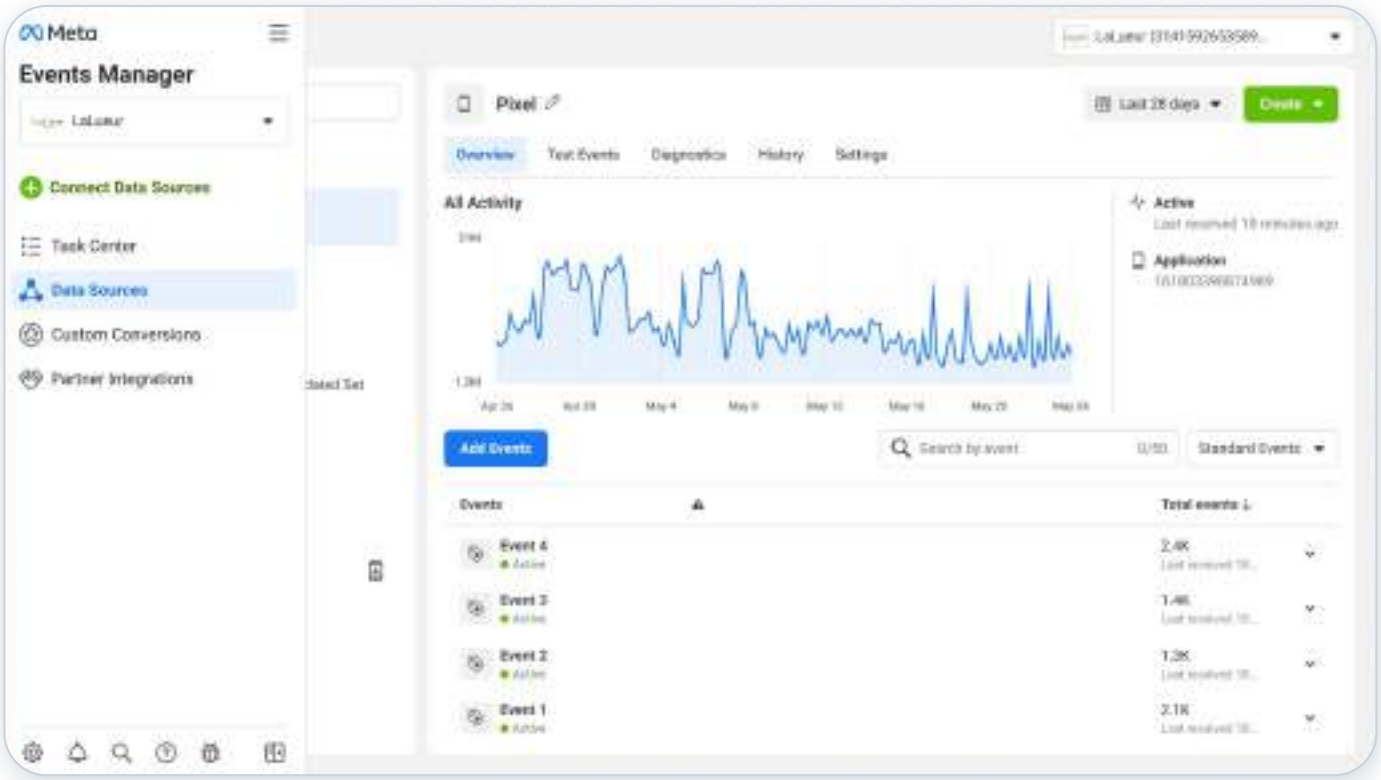
To install the pixel code on your business website, go to Events Manager and select **Connect data sources**. Then click **Data sources**.

You can install the pixel manually using code or by using a partner integration.

Manually add the pixel code to your website
To set up the pixel yourself, copy and paste the base code into your website code.

1. Copy the pixel base code.
2. Find the header of your website or locate the header template in your CMS or web platform.
3. Paste the base code at the bottom of the header section, just above the closing head (</head>) tag, on every page of your website.

Use a partner integration
If your website runs on a supported website or ecommerce platform, such as Shopify, WordPress or Squarespace, you can set up the pixel without having to edit any of your website code. Partners can also help scale ad creation and reporting, as well as receive and evaluate the actions people take.



Meta Pixel and Meta Conversions API

The Meta Pixel and Conversions API both help measure advertising effectiveness across Meta technologies, but they work differently. The pixel is a piece of code you can place on your website to understand how people use and interact with it. It's ideal for browser-based data. The Conversions API sends event data directly from your servers to Meta. It's a more secure and reliable tracking method that works well in environments with restricted browser tracking.

For the best results, use the Conversions API with the pixel. The Conversions API enables you to share website events that the pixel may lose due to network connectivity issues or page loading errors. The Conversions API can also be used to share other types of events and data that the pixel cannot, such as app events, offline conversions and messaging events.

The Conversions API can support your marketing in the following three ways:

- **Full-funnel visibility:** Gain visibility into the customer journey across multiple channels, and examine behavior as people reach the lower end of the purchase path.

- **Stronger data sharing:** The Conversions API for web creates a direct connection between your servers and Meta. It also honors the privacy choices of people who don't wish to share their data with third parties.

- **Data control:** Better manage what data you share and when you share it. When you use the Conversions API along with other signal-sharing tools, you can gain additional insights into the behavior of people that interact with your business—in your store, on your app and on the web.

To start using the Conversions API, go to Events Manager and select **Connect data sources**. There are Conversions API integration options available to you, depending on your business needs.

- **Direct integration using code:** Build a direct integration with the Conversions API for full control. This requires a developer and can be set up by visiting Meta for Developers to share website, app or offline events.
- **Commerce platform partner integrations:** Use Meta Business Partner integrations at no additional cost with platforms like Shopify, WooCommerce, Wix or BigCommerce.
- **Other partner solutions:** Set up the Conversions API through system integrators on partner platforms like Adobe, Google Tag Manager or Tealium.
- **Conversions API Gateway:** Use this code-free, self-service setup option in Events Manager. Ideal for managing multiple businesses, because it enables a single configuration across multiple accounts.

Connect your data with Meta Pixel and Conversions API

With Meta Business Tools, such as the Meta Pixel and Conversions API, you can measure customer actions on your website, such as the number of people clicking on the website or adding products to a cart. The pixel and the Conversions API log these actions as events, which you can use to learn more about the journey your customers take and the impact of your ad campaigns.

As people interact with your business website, the pixel enables you to share those events to help your ads reach a more relevant audience, provide a more personalized ad experience, and optimize your ad campaigns towards better business outcomes. There are two categories of events: standard events and custom events.

	Standard event	Custom event	Parameter
Description	Actions recognized and supported across ad products	Actions that aren't included in standard events	A more defined data point within an event
Example	`AddToCart`	`Page_Visible_Time`	`value, num_items`

Custom events are actions that go beyond those covered by standard events. You can give these events a unique name to represent the action taking place. When you set up custom events in your pixel code or Conversions API code, you can share those custom events to help you optimize for conversions and build audiences.

Verify custom website events in Events Manager to help make them available for advertising purposes, such as in ad campaigns, custom conversions, custom audiences and lift studies.

The Conversions API directly connects marketing data with Meta technologies to optimize ads targeting, reduce costs and measure results. It complements the pixel by capturing website actions, like purchases or cart additions, and can track data the pixel can't, such as app events and offline conversions. App events include information about people's interactions with apps, and offline conversions measure in-store actions linked to ads.

Manage your ad campaigns





Manage your ad campaigns

Reporting in Ads Manager can help you determine how close a business is to reaching its advertising goals. You can use the metrics in Ads Manager to learn what worked well and what can be improved, which can inform future ad campaigns. You can also use the metrics in Ads Manager to optimize ads while they're running.



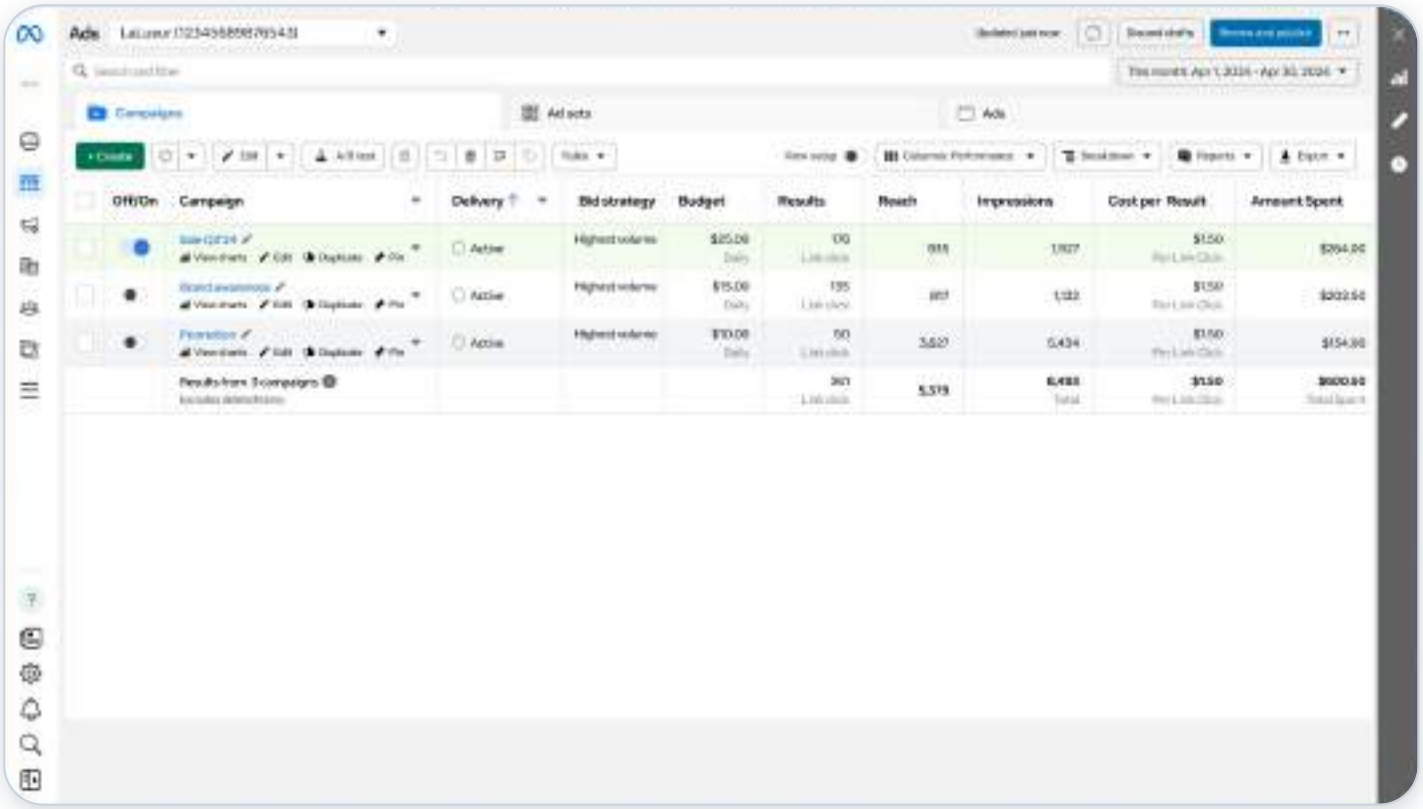
Reporting in Ads Manager

Once an ad campaign is finished, you can view its results in Ads Manager. In the Ads Manager dashboard, you can see each level of the campaign (campaign, ad set and ad). This is where you can view and compare the performance of past and current campaigns, ad sets and ads using metrics relevant to the campaign objective. While there are three tabs you can select, your dashboard will automatically default to the campaign tab.

Campaigns
In this tab, information in the dashboard will be organized by ad campaign. The dashboard will automatically show you a list of active and inactive campaigns, the performance of each campaign and more.

Ad sets
In this tab, information in the dashboard will be organized by ad set. You can narrow the list of ad sets shown here to a specific campaign by selecting a campaign in the campaigns tab.

Ads
In this tab, information in the dashboard is organized by ad. Information includes ad quality diagnostics.



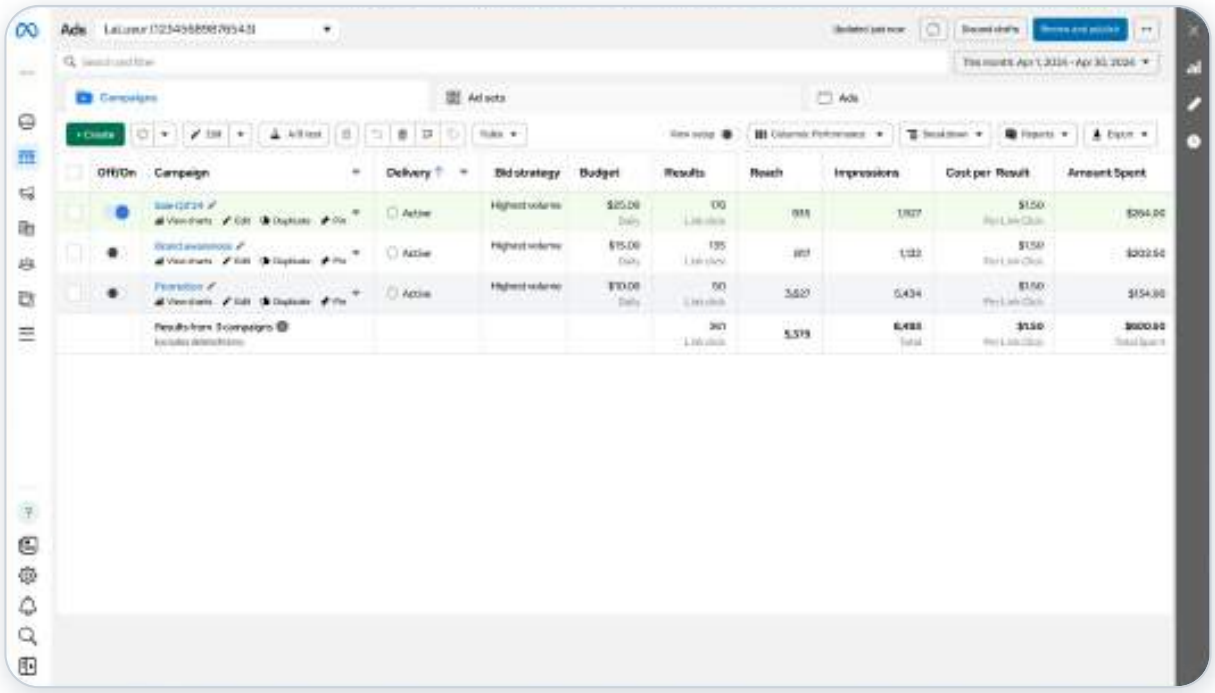
Reporting in Ads Manager

On each tab, you can see columns that provide different metrics you can use to analyze the impact of your campaigns. In the default dashboard settings, the first two columns show status and campaign information about ad delivery and bid strategy.

Delivery
This column tells you whether the ad campaign is running or not. Possible delivery statuses include: off, active, completed or in review.

Bid strategy
This column shows the campaign bid strategy, which is set to a default. Results metrics tell you how many people an ad campaign has reached and the results it achieved.

- **Results**: This is the number of times an ad achieved an outcome, based on the objective and ad delivery optimization selected.
- **Reach**: This is the number of people who saw the ads at least once. Reach is different from impressions, which may include multiple views of an ad by the same people.
- **Impressions**: This measures how often the ads were on screen for the selected audience.
- **Cost metrics**: This shows how the ad budget is being spent.
- **Cost per result**: This metric is calculated as the total amount spent divided by the number of results. This indicates how cost efficiently the campaign achieved its ad objectives.



Report settings

Once you select the components of your report, you can then select settings to start running your ads report. These report settings include filters, search and date range.

You can rely on the default settings in Ads Manager for many metrics. You can also customize reports to show the metrics that matter most to you or that best align with your business objectives.

Search
Use the search bar to find and customize the results you see in Ads Manager.

Filters
You can use filters to find specific campaigns, ad sets or ads, and then customize the results you see in Ads Manager. You can choose from preset filters or create your own custom filter.

Date range
The default setting for date range is the last 30 days. To change this, you can either specify the date range or select a new date preset.

Breakdown
You can sort your campaigns, ad sets or ads by:

- **Time**: days, weeks, two-week intervals or months
- **Delivery**: aggregated, anonymized information about who your ad was delivered to
- **Action**: actions taken as a result of your ad

Reporting controls in Ads Manager

Search	Campaign name, Ad set name, Ad name, Campaign ID, Ad set ID, Ad ID, Campaign tag
Filters	You can use filters to find specific campaigns, ad sets or ads, and then customize the results you see in Ads Manager.
Date range	The default setting for date range is the last 30 days.
Breakdown	You can sort your campaigns, ad sets or ads by time, delivery or action.

Customize ad reports

You can customize your ads report dashboard by adding columns to the data table. The metrics you can add to your report fall into four different categories:

- **Performance:** results, reach, frequency and impressions
- **Engagement:** Page posts, messaging, media, clicks and awareness
- **Conversions:** website conversions, website purchases, cost per website conversion, mobile app installs and mobile app purchases
- **Settings:** start date, end date, ad set name, ad ID, delivery, bid and objective

You can also see charts visualizing ad performance. To view these charts, hover over a campaign, ad set or ad name, then select **View charts**.

In addition to viewing campaign results in Ads Manager, you can see how your content is performing on Facebook and Instagram. Instagram also offers insights you can use to learn more about the performance of your paid activity. You can view insights on the engagement of specific posts, stories, videos, reels and live videos. You need to be logged into your Instagram business or creator account on your mobile device to view ad insights.

	
Page Insights 1. Navigate to Facebook. 2. From your Feed, click **Pages** in the left menu. 3. Select your Page. 4. Click **Insights** in the left menu. 5. Click **Ads**. From here, you can see metrics like reach, post engagement and link clicks.	**Insights on Instagram** 1. Navigate to your profile or go to the menu in the upper right corner. 2. Tap **Insights**. 3. Tap the metrics under **Overview** or specific content you shared for a more detailed breakdown.

Evaluate and analyze campaign results

To get an understanding of whether a campaign was successful at reaching its goal, evaluate the results the campaign generated against the costs of the campaign. You can evaluate and analyze campaign, ad set or ad results in Ads Manager to make informed decisions about budget and ad delivery. Consider the following when evaluating:

- What was my ad objective? When you create a campaign in Ads Manager, begin by choosing an objective for your campaign and the result you want the campaign to optimize for.
- How many results did the campaign generate? To evaluate results, refer to the **Results** column in your Ads Manager report.
- How much did each result cost? Refer to the **Cost per result** column in your Ads Manager report.

In your Ads Manager report, you can find an overview of results per campaign, ad set and ad. While these aggregate results can give you immediate insights into whether a campaign reached its goal, you can get more insights by breaking down the results further. You can break down the results by:



Time

Filter results by days, weeks, two-week intervals or months.



Delivery

Filter results by demographic, location, device, app, placement or time of day.



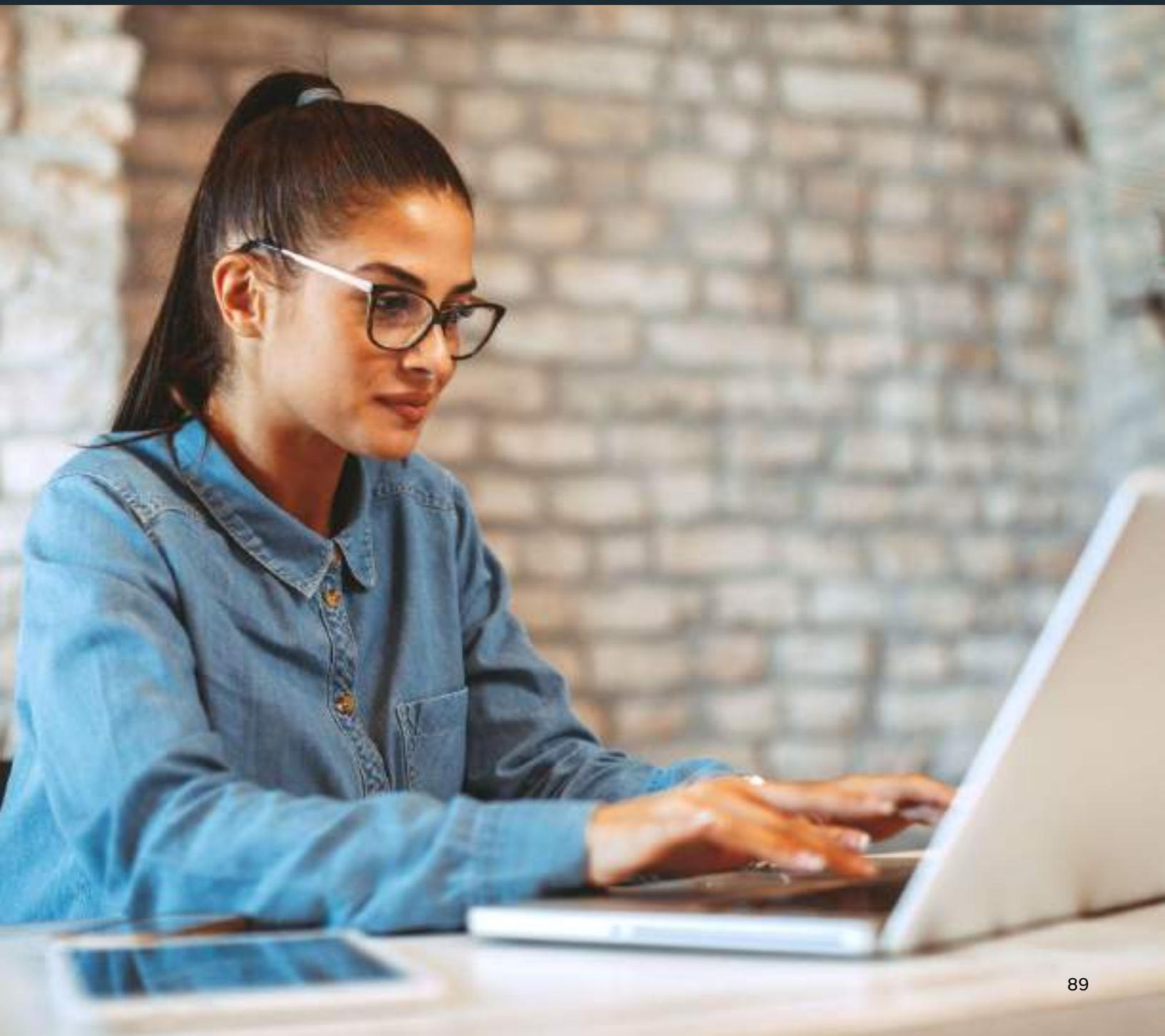
Action

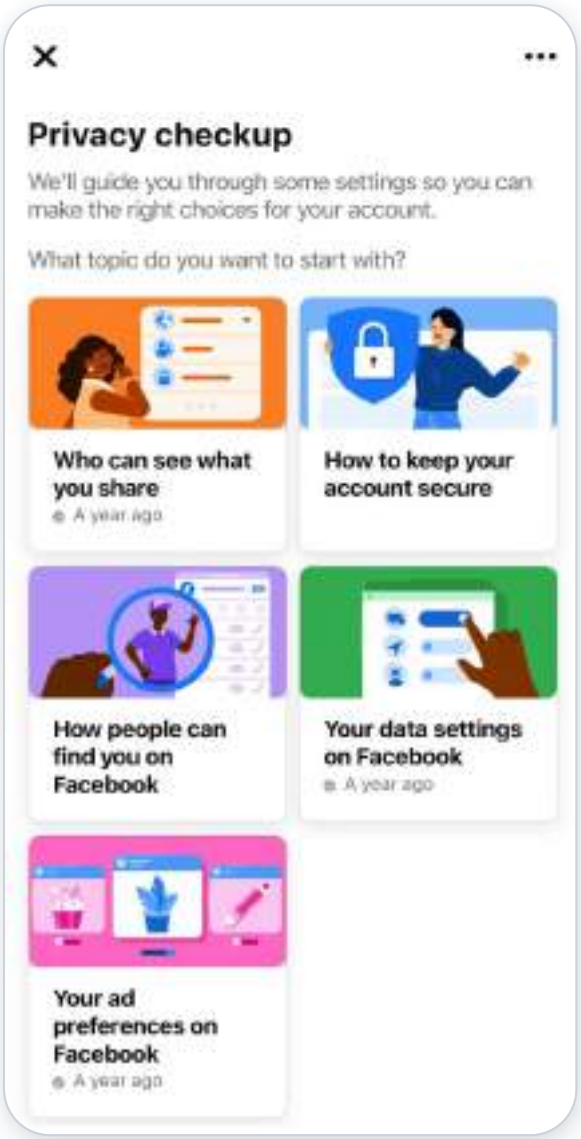
Filter results by actions related to the ads, like video view type, conversion device and more.

When you analyze metrics in Ads Manager, you may find that a custom report is very helpful, as you can share it with other people too. You can do this using Meta Ads Reporting.

- **Create a custom report.** You can create a custom report in Ads Reporting. You can access the tool in Meta Business Tools or through the **Ads Reporting** tab in Ads Manager. Ads Reporting enables you to create custom reports. You can also use breakdowns, filters, sorting and other advanced functions to customize your reports.
- **Schedule and share.** You can also schedule a recurring report from Ads Reporting and have it emailed to you or someone else.
- **Export.** When you export reports in Ads Reporting, you can save your reports externally as an XLSX or CSV file.

Privacy and data protection across Meta technologies





Privacy and data protection across Meta technologies

Some people use Meta technologies to share their lives or to see the world from new perspectives. Others use Meta technologies to connect with friends and family. The way you use Meta technologies can help determine how your information is used for advertising. Facebook Privacy Checkup helps you control what you share, who you share it with, the content you see and experience, and who can contact you.

You can use Facebook Privacy Checkup to review your privacy and security settings. The settings you can review and edit in Privacy Checkup include: who can see what you share, how to keep your account secure, how people can find you on Facebook, and your data settings on Facebook.

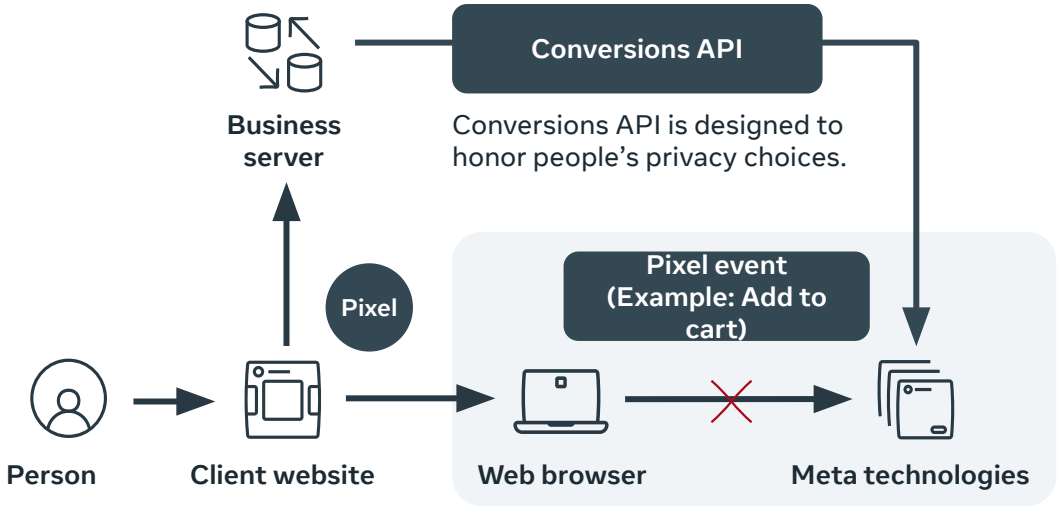
How Meta protects data

Digital ads connect a business and their message with relevant people based on the preferences, interests and behaviors they choose to share online. As expectations for data privacy have increased, governments and technology companies around the world are implementing new data policies. It's important to understand how new policy changes may affect your advertising efforts and what you can do to help your business adapt.

The actions people take on your website or app provide data that can help you reach a relevant audience with ads across Meta technologies. As people interact with your business on your website or app, you can use that data with Meta Business Tools, such as the Meta Pixel and the Conversions API.

Changes to data privacy affect how advertisers gather and share data. For example, cookies and device IDs may become less effective over time because of new web browser limitations. The pixel relies on web browsers and cookies to provide accurate data to help with personalized ad experiences and discovery. The Conversions API preserves data quality and supports efforts to respect privacy by creating reliable data pathways between Meta technologies and server-side data.

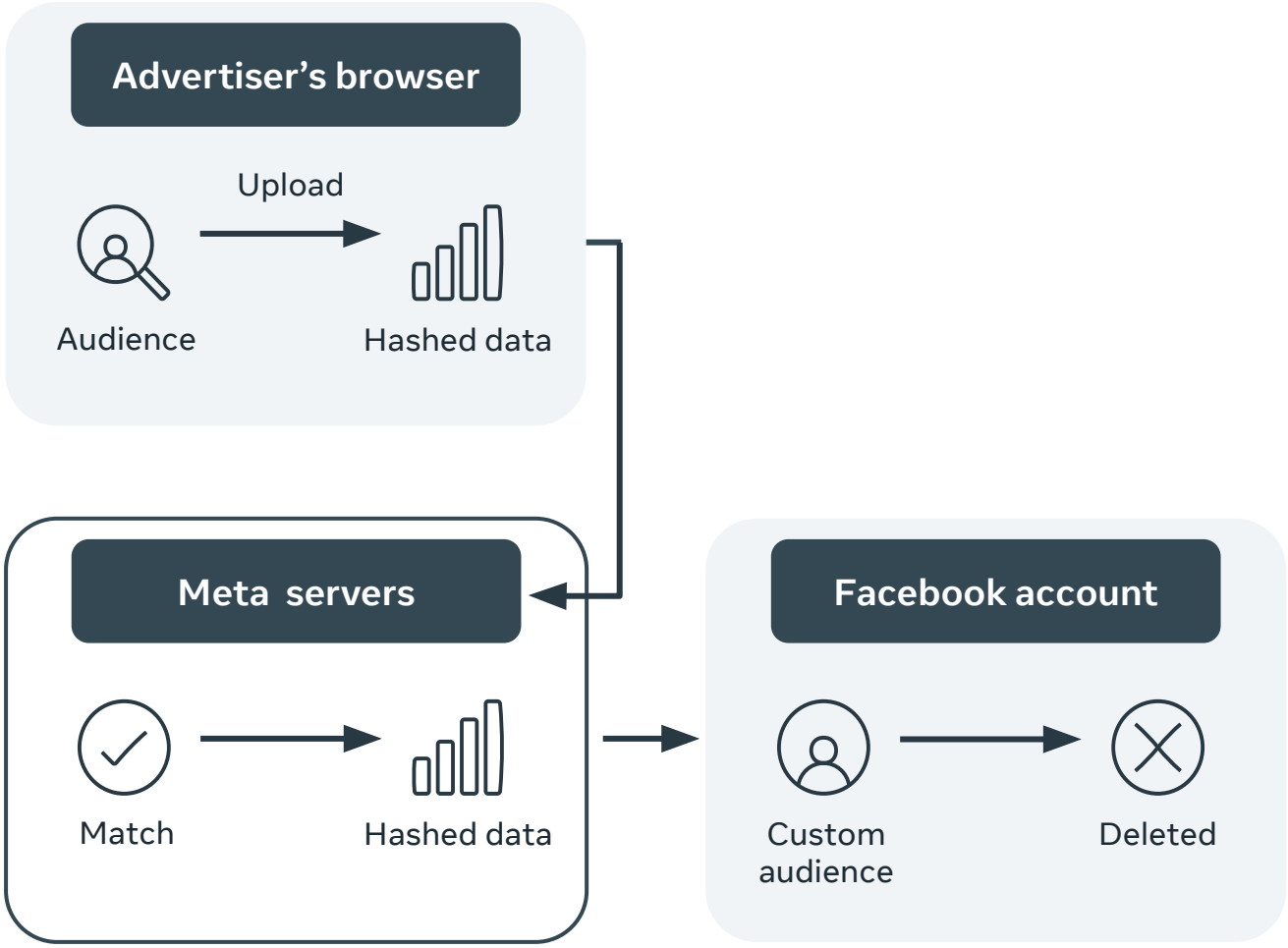
When used with the pixel, the Conversions API provides better data control, strengthened data sharing and a wider range of data to guide your advertising. Both the pixel and the Conversions API adhere to the same contractual restrictions and transparency and control tools.



Data hashing

When you upload contact information to create a customer list, or the pixel and the Conversions API send contact information, a method called data hashing is used. Data hashing involves transforming a string of characters, such as name, email and address, into a shorter fixed-length value or key that represents the original string. Through this process, the information is turned into randomized code.

The hashed contact information becomes a custom audience that you can target ads to. Custom audiences are stored in your business's ad account, and only people who are authorized can access it.



Meta Advertising Standards

Meta Advertising Standards provide guidance on what types of content you can use in your ads. When you place an order, your ad is reviewed against these policies before it's shown to an audience. Most ads will be reviewed within 24 hours, although in some cases the review may take longer.

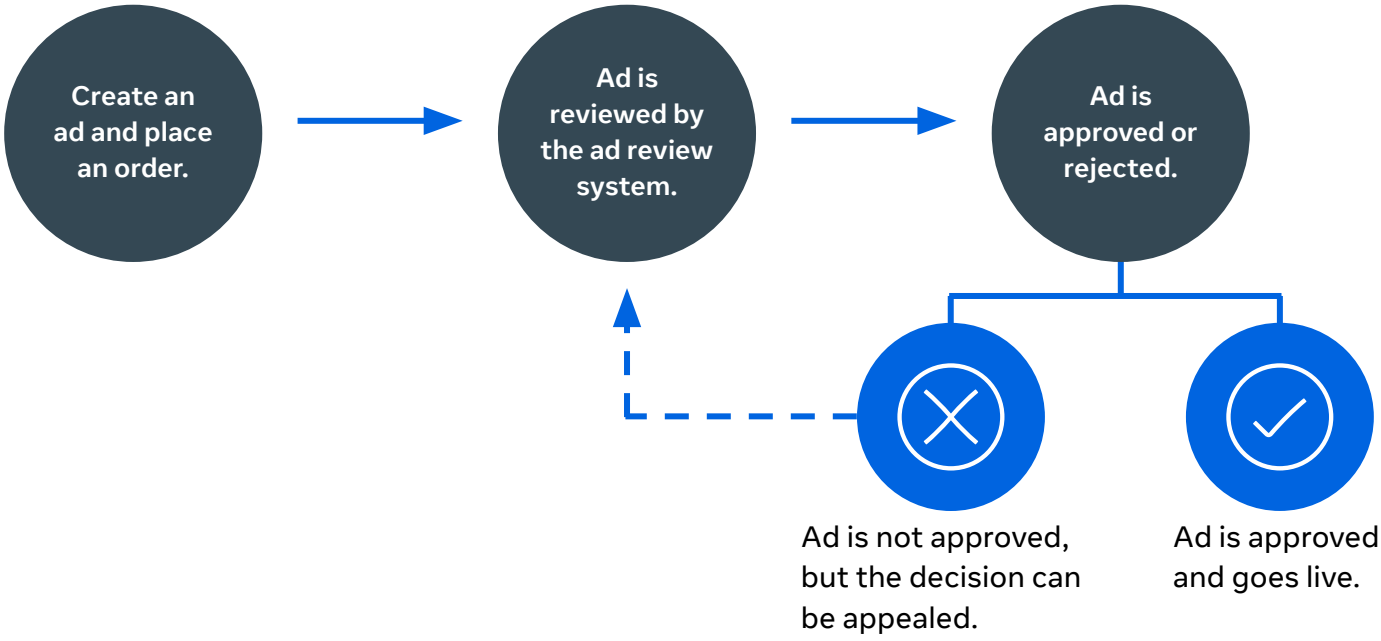
During the ad review process, images, text, targeting and positioning in an ad are examined, as well as the content on the ad's landing page. For example, an ad may not be approved if the landing page content isn't fully functional or if it doesn't match the product or service promoted in the ad.

After an ad is reviewed, you receive a notification stating whether it has been approved or not. If it's approved, the ad will start running and its results will begin to appear in Ads Manager.

If an ad is rejected, you can edit it to meet the Advertising Standards. Once the edits are made and the changes saved, it will be resubmitted and reviewed again.

If your ad goes against the Advertising Standards, it may lead to enforcement action against your profile and associated Pages or ad accounts. Enforcement actions include:

- Disabling associated Pages.
- Disabling existing ads.
- Restricting the ability to run new ads.



Ads are rejected when they don't follow the relevant advertising policies. Understanding common reasons ads are rejected—and how to address the problem—can help you more effectively run ads on Meta technologies.

Common reasons ads are rejected:

- Doesn't clearly specify the product or service offered
- Implies the advertiser knows specific attributes about the person reading the ad
- Uses offensive language
- Makes false or misleading claims or withholds important information

Common reasons landing pages are rejected:

- Doesn't clearly or accurately reflect the product or service promoted in the ad
- Contains content, products or services prohibited by the Advertising Standards
- Contains content that interferes with a person's ability to navigate away from it
- Doesn't work properly or isn't functional at all (ads must not direct people to non-functional landing pages)

Common reasons ad creative is reject:

- Includes images or videos of a sexual nature
- Includes misleading buttons in the image
- References Facebook or Instagram in a way that goes against Meta brand guidelines
- Focuses on a body part or pain point

In addition to the most common reasons ads are rejected, it's also important to be familiar with the Facebook Community Standards and Instagram Community Guidelines:

 Community Standards

 Community Guidelines

Learn more about Meta Advertising Standards, and get more information on prohibited content, ads targeting and data use restrictions. There are certain products, services and advertising tactics that are never allowed on Meta technologies. There are also specific restrictions for ads related to credit, alcohol, weapons, pharma, financial services, politics, social issues, housing and employment. Some rules may vary from country to country, based on market regulation.

Study questions



1. **Which Meta technology allows businesses to start conversations with customers through private texts, voice messages and video calls?**

   Choose the correct answer.

   a. Facebook

   b. Messenger

   c. Instagram

   d. WhatsApp

2. **What is a key benefit of using WhatsApp Business for customer interactions?**

   Choose the correct answer.

   a. Automated ad placements

   b. Direct product sales through the app

   c. Quick replies and greeting messages

   d. Exclusive business analytics

(continued)



3. **What is the primary purpose of using Meta Business Suite for managing an online presence across Facebook, Messenger, Instagram and WhatsApp?**

   Choose the correct answer.

   a. To increase the frequency of posts across apps

   b. To streamline the management and scheduling of posts

   c. To enhance the security of business interactions on social media

   d. To monitor competitor activities on these apps

4. **What are some of the key features available to businesses when they set up a business account on Instagram?**

   Choose the correct answer.

   a. Manage messages more easily by organizing, flagging and filtering conversations.

   b. Access insights about account performance, content and followers.

   c. Use a professional dashboard to create ads and set up a shop on Instagram.

   d. Create and manage multiple accounts from a single login.

(continued)



5. **How does the Meta Business Suite enhance the effectiveness of ad campaigns across apps like Facebook, Messenger and Instagram?**

   Choose the correct answer.

   a. By providing tools for direct sales through social media apps

   b. By offering detailed analytics to measure ad performance

   c. By enabling automated ad placements based on people's behavior

   d. By enabling cross-app ad management from a single interface

6. **What is the primary benefit of using Meta Ads Manager for creating and managing targeted ad campaigns?**

   Choose the correct answer.

   a. To increase the frequency of posts across apps

   b. To streamline the management and scheduling of posts

   c. To enhance the security of business interactions on social media

   d. To create and manage targeted ads based on people's behavior

(continued)



7. **What is the advantage of using Meta Ads Manager?**

Choose the correct answer.

a. Managing posts

b. Creating and managing ads

c. Tracking insights

d. Scheduling content

8. **What is the primary difference between the Conversions API and Meta Pixel in tracking events?**

Choose the correct answer.

a. Conversions API enables server-side tracking, whereas Meta Pixel operates on the client-side.

b. Only Meta Pixel is used for client-side tracking, while Conversions API is not involved in tracking.

c. Conversions API is tailored for server-side data integration, while Meta Pixel receives and sends data from the client-side.

d. Both tools serve the same purpose in tracking events without any significant differences.



9. **What is the primary benefit of using the Conversions API for businesses?**

   Choose the correct answer.

   a. To increase website traffic

   b. To improve ad targeting and optimization

   c. To enhance data privacy and security

   d. To reduce advertising costs

10. **How does the integration of analytics tools within Meta technologies assist businesses in refining marketing strategies?**

    Choose the correct answer.

    a. By providing real-time data on ad performance

    b. By enabling manual adjustments to live campaigns

    c. By offering insights into competitor marketing strategies

    d. By automating all marketing decisions

Answer key

Question number	Correct answer	Explanation	Location
1	d	WhatsApp enables businesses to communicate directly with customers through texts, voice messages and video calls.	Page 6
2	c	WhatsApp Business enhances customer service through features like quick replies and greeting messages.	Page 8
3	a	Meta Business Suite is designed to manage posts across multiple Meta apps efficiently.	Page 19
4	a	When businesses set up a business account on Instagram, they gain access to several tools and features designed to help them grow their presence and connect with their audience more effectively. One such feature is the ability to manage messages more easily by organizing, flagging and filtering conversations.	Page 22
5	d	Meta Business Suite enhances the effectiveness of ad campaigns by enabling businesses to manage ads across multiple apps like Facebook, Messenger and Instagram from a single interface. This feature simplifies the ad management process and ensures consistency across different apps.	Page 34
6	d	The primary benefit of using Meta Ads Manager is to create and manage targeted ad campaigns based on people's behavior, making it easier for businesses to reach their desired audience.	Page 40

Question number	Correct answer	Explanation	Location
7	b	Meta Ads Manager is primarily used for creating and managing targeted ad campaigns, which enables businesses to optimize their advertising efforts effectively.	Page 56
8	a	The Conversions API is designed for server-to-server integration, enabling advertisers to create a direct connection between their marketing data and Meta servers, which leads to a more secure connection that isn't impacted by website connectivity issues, slow load times, etc. In contrast, the Meta Pixel is a string of code placed on a client's website or browser which tracks events in real time.	Page 66
9	b	The Conversions API enables businesses to send event data directly to Meta servers, which enables more accurate and effective ads targeting and optimization.	Page 71
10	a	The integration of analytics tools within Meta technologies provides businesses with real-time data on the performance of their ads, enabling them to make informed decisions about optimizing their marketing strategies.	Page 81

Glossary

Acronym	Term	Definition
	Ad approval	The process by which Meta approves ads that meet Advertising Standards and Community Standards.
	Ad creative	The visual and textual elements of an ad, including images, videos, headlines and descriptions.
	Ad format	The design and layout of an ad, such as a single image, carousel or video.
	Ad rejection	The process by which Meta rejects ads that do not meet Advertising Standards and Community Standards.
	Ad review process	The process by which Meta reviews ads to ensure they meet Advertising Standards and Community Standards.
	Ad set	A group of ads that share the same budget, targeting and schedule.
	Ads Manager	A tool that enables advertisers to create and manage ad campaigns on Meta apps.
	Advertising Standards	Guidelines that outline what types of ads are allowed on Meta apps.
	Audience	A group of people who are potential customers for a product or service.
	Budget	The amount of money an advertiser has allocated for a specific ad campaign.
CTA	Call to action	A button or link in an ad that encourages people to take a specific action, such as **Shop now** or **Learn more**.
	Campaign	A series of ads that are designed to achieve a specific marketing goal.
CTR	Clickthrough rate	The percentage of people who click on an ad after seeing it.

Acronym	Term	Definition
	Community Standards	Guidelines that outline what types of content are allowed on Meta apps.
	Conversion	An action taken by a person on a website or app after viewing an ad, such as making a purchase or filling out a form.
	Conversion rate	The percentage of people who complete a desired action after clicking on an ad.
CPC	Cost per click	The amount of money an advertiser pays each time a person clicks on an ad.
CPM	Cost per impression	The amount of money an advertiser pays for every 1,000 times an ad is shown.
	Customer journey	The path a customer takes from being a prospect to becoming a loyal customer.
	Data protection	The practices and policies used to protect personal information from unauthorized access or disclosure.
	Demographics	Characteristics of a population, such as age, gender, income and occupation.
	Engagement	The level of interaction between a person and a brand, such as likes, comments and shares.
	Event	A specific action or occurrence that can be tracked and measured, such as a purchase or app install.
	Facebook Business Suite	A web and mobile technology that helps businesses manage their online presence across Facebook, Instagram and WhatsApp.
	Facebook Page	A public profile specifically created for businesses, brands, celebrities and organizations.
	Facebook Page Insights	A tool that provides data and analytics about a Facebook Page's performance.

Acronym	Term	Definition
	Instagram account	A person’s account on the photo and video-sharing social networking app Instagram.
	Insights on Instagram	A tool that provides data and analytics about an Instagram account's performance.
	Lookalike audience	An audience of people who are similar to a business's existing customers, based on demographics, behavior and other factors.
	Messenger	A messaging app that enables people to send messages, make voice and video calls, and send money.
	Objective	The goal of an ad campaign, such as increasing website traffic or boosting sales.
	Optimization	The process of improving an ad campaign's performance by adjusting various elements, such as targeting, bidding and ad creative.
	Placement	The location where an ad is displayed, such as on Facebook, Instagram or Audience Network.
	Policy	A set of rules or guidelines that govern behavior or actions.
	Privacy	The state of being free from public attention or scrutiny, especially when it comes to personal information.
	Prohibited content	Types of content that are not allowed on Meta apps, such as hate speech or graphic violence.
	Facebook Page	A public profile specifically created for businesses, brands, celebrities and organizations.
	Facebook Page Insights	A tool that provides data and analytics about a Facebook Page's performance.

Acronym	Term	Definition
	Restricted content	Types of content that are allowed on Meta apps but may have certain restrictions or requirements, such as alcohol and gambling.
	Targeting	The process of selecting specific audiences to show an ad to, based on demographics, interests, behaviors and other factors.
	WhatsApp	A messaging app that enables people to send messages, make voice and video calls, and send money.