Account Structure Best Practices

Account Groups can help improve your overall account management experience by alleviating the need to log in to separate accounts through generic login emails in order to access your advertising with Facebook. You can now use your work email (or another single email of your choice) to log in and have access to all of your Facebook Advertising accounts.

1 Initial Setup

1.1 Create one login to access all accounts:

▶ Contact your Facebook representative to create a 'Top Level Login' that will be granted the highest level of admin access to all your Facebook accounts.

▶ This can be an existing login that currently has access to all your accounts or a new login you'd like to create and grant access to all your existing accounts.

▶ We recommend that the email and password for this account be limited to the most trusted people at the company and NOT be an individual's work/personal email. This login will serve as the admin on all of your company's account groups in order to maintain consistency and control across multiple groups.

Please note: this login will not be a Facebook profile; it will be a business account that is used for business purposes.

1.2 Create groups to fit your company structure

▶ If you already have existing logins that you use to access your business* accounts, we recommend creating a group for each client team (or based on how your company structures your advertising initiatives, i.e. region, vertical, etc) from the 'Top Level Login' mentioned above.

▶ In order to successfully add each account to your new account groups, you can add the account ID's to the appropriate group, which will create a pending group request. You must use the account ID to add accounts to a group, the login email of the account will not work for this.

▶ You will then need to log in to each of these accounts and grant the group access to the account before it can be accessed via the group.

Once account group approval has been completed, users with access will no longer need to log in to the individual accounts again since you will have access via your work email login**

*   If you do not currently use business accounts (instead use Facebook profile accounts) to manage your marketing solutions, you can add them just as you do business accounts but we strongly suggest you create business accounts for all your marketing initiatives. This will allow for easier account management amongst your marketing team.

**   The one exception is if you choose to add this account to additional groups, each time you will need to go through the group request approval process by logging into the account and approving the group request.

② Permissions, new account creation and ongoing management

Once all your account groups are structured correctly, you can begin granting permissions, creating new accounts and general ongoing management with your team. While there is no 'right' way to use the Account Groups product to organize and manage your accounts, we do recommend a few best practices to ensure you and your team are setup for success.

2.1 Grant access permissions

▷ Since you have successfully set up all your account groups, you can now give yourself and others different levels of permission to your groups. You can grant 3 levels of access: Administrator, General User, or Reports Only*

  ▪ **Administrator:** Has admin access to every account within the account group, can grant other users access, create/manage/report ads, view/edit funding instruments.**

  ▪ **General User:** Can create/manage/report ads. Cannot add anyone else to a group, cannot access any funding instruments on any accounts.

  ▪ **Reports Only:** Can only see the reports tab on accounts within group.

▷ Cannot view/edit any campaigns or ads within any accounts. You can grant user permission to individuals by entering their name (if you are Facebook friends and want to add their personal profile to the group) or business login they have created with Facebook using their work or preferred business email in the 'Add User' field along the desired level of access.

▷ You can grant as many users access to groups as you'd like and, if you are an admin of the group, can remove any user at any time (including other admins even if the other admin was the creator of the group).

*   Our system always goes with the 'most powerful' user permission (Ex: I have reports only access to a specific account, but am given admin access to a group that contains that particular account - I now have admin access to that account. Conversely, if I have admin access to an account but reports only access to a group containing that account, I will continue to have admin access to that account but reports only access to the other accounts within the group)

**   As an admin, you cannot view/edit the funding instruments on any account that is attached to a personal profile. You can only view/edit these on business accounts.

2.2 Create new accounts

▷ If you'd like to create a new business account to advertise with us you can work with your Account Manager to set up a new business account for you. Provide them with a generic login email (ex: adaccount1@gmail.com) and password and they will create the new account and provide you with the account ID (ex: 12345678).

▷ Add the account ID to the appropriate account group and you will again go through the 'handshake' process: Upon adding the new account ID to a group, it will create a pending group request that you can approve by logging in to the new account and accepting the account group request.

▷ Once the 'handshake' is complete, you will have successfully created & added your new business account to your group(s) and will have full access to it going forward. You will no longer need to login to this account individually to manage your advertising initiatives.*

*   The one exception is if you choose to add this account to additional groups, each time you will need to go through the group request approval process by logging into the account and approving the group request.

2.3 Page/App permissions do not change

▶ Account Groups does not impact the way advertising privileges work for Pages or Apps. Each account that is an administrator (or advertiser) of a Page or App still has the exclusive right to advertise that Page.

▶ Accounts within a group do not share Page/App admin access so the ability to advertise particular Pages/Apps remain exclusive to the individual accounts.

▶ If you would like the ability to advertise different Pages or Apps in multiple accounts within a group, you will need to grant admin access to those Pages in each account, and advertiser access to those Apps in each account.

3 Creating a multi-account structure

We highly recommend that you structure your accounts in a way that separates your clients or marketing initiatives into different accounts. This will allow for much easier and seamless account intelligence and management moving forwards. Transitioning to a multi-client account structure may take some time at first, but will be well worth it in the future.
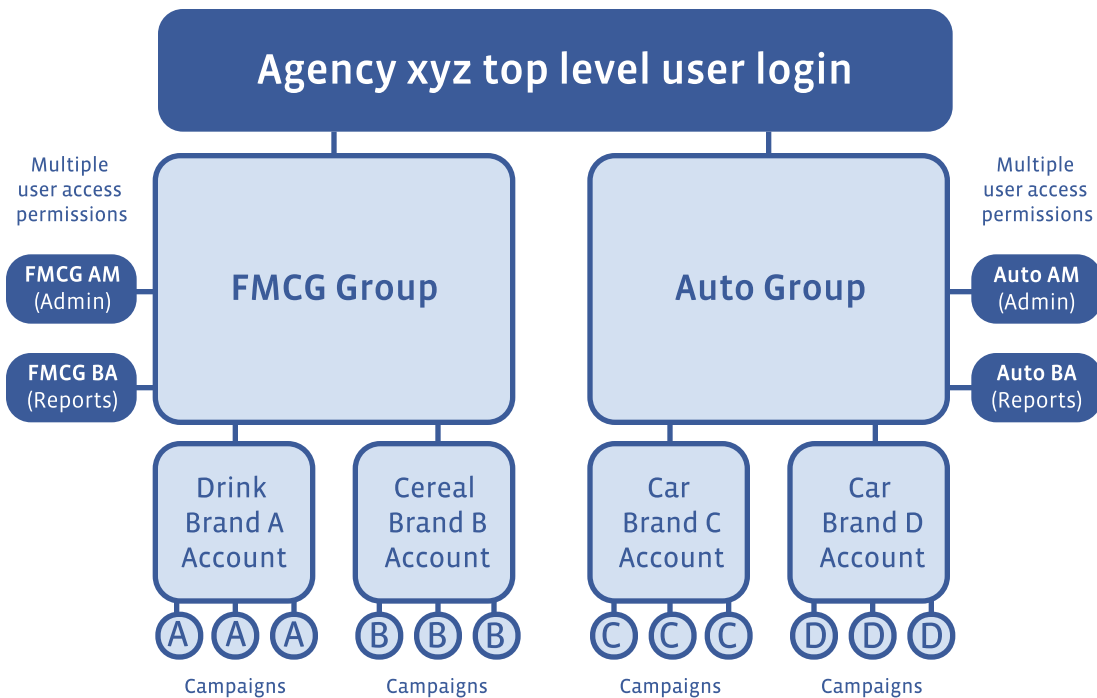
3.1 Build a multi-account structure

To begin structuring your accounts in a multi-client format, please work closely with your Account Manager who can guide you through this process:

▶ Work with your Account Manager to create a new ad account for each client.

▶ Group all of these new accounts together under one or more groups, either by client or simply by placing all accounts into a single group for your agency. In addition, add your primary account — the one that currently contains all of your campaigns for your different clients — to this group as well.

▶ Assign yourself and your colleagues the correct permissions at the account group level.

▶ Over time, use a bulk tool (Facebook Power Editor or a similar tool) to download specific campaigns, and then re-upload them back into the correct new account.

Please Note: The history for these campaigns will not be preserved in any way when you copy them. You are creating fresh ads in a new location. Thus, you should do this transition over time, at natural break points in campaigns when this transition will not be disruptive. You can export all your ads and import into the new account, so please work with your Account Manager if you'd like to do this.

3.2 Multi-account structure examples

▶ Example 1: Agency structured by vertical

Agency xyz top level user login

Multiple
user access
permissions

FMCG AM
(Admin)

FMCG BA
(Reports)

FMCG Group

Auto Group

Multiple
user access
permissions

Auto AM
(Admin)

Auto BA
(Reports)

Drink
Brand A
Account

Cereal
Brand B
Account

Car
Brand C
Account

Car
Brand D
Account

A A A   B B B   C C C   D D D

Campaigns   Campaigns   Campaigns   Campaigns

▶ Example 2: Brand structured by region

Brand A top level user login

Multiple
user access
permissions

FMCG AM
(Admin)

FMCG BA
(Reports)

US Group

Europe Group

Multiple
user access
permissions

Auto AM
(Admin)

Auto BA
(Reports)

US
Account
1

US
Account
2

Europe
Account
1

Europe
Account
2

1 1 1   2 2 2   1 1 1   2 2 2

Campaigns   Campaigns   Campaigns   Campaigns