HIGH-UP ADS

FREE GUIDE

THE 2026 GUIDE TO META ADS

How to run Facebook and Instagram ads for a small business without burning through your budget



15 CHAPTERS

107 CHECKBOXES

11 BLOCKS TO COPY

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This guide is for the owner of a small US business: an online store, a shop or clinic that books appointments, a bed and breakfast that takes reservations, a company that sells to other companies. You want to run your own Facebook and Instagram ads, or you've already spent some money and you're not sure what it bought you.

On Meta, most of the money gets lost in decisions you make before the first ad runs. A handbag store gets 40 orders in a week, but the pixel only sees 20, so as far as Meta knows, the ads work half as well as they really do. A mattress store picks the "Traffic" objective because clicks are cheap, gets plenty of visits and almost no orders. Three ad sets at $30 a day learn less than one at $90. A campaign you tweak every day never gets the chance to learn anything.

Say a supplement store sees 100 orders from its ads in Ads Manager for the month, but compared with a month without ads it has only 60 more. Ads Manager tells you what the ads sold by Meta's count. What you earned, you only find out from your store, your phone, and your invoices.

The examples are four made-up businesses, one for each kind of business: an online kitchen knife store, an auto repair shop in Dayton, Ohio, a five-room bed and breakfast in Fredericksburg, Texas, and an office cleaning company on monthly contracts.

Meta moves its menus around often. If a button isn't exactly where we say, search for it by name.

Words you'll see everywhere

WORD	WHAT IT MEANS
Ads Manager	Meta's tool for building and tracking your ads
Campaign, ad set, and ad	The campaign holds the objective and usually the budget. The ad set holds the audience and the places your ad shows up. The ad is what people see
Pixel	Meta's code on your website that records what people do there
Conversions API	Sending the same orders and leads to Meta straight from your store platform or CRM, instead of from the visitor's browser
ROAS	Return on ad spend: the sales your ads bring back for every dollar spent on them
Learning phase	The stretch when Meta is still figuring out who to show your ad to. Results jump around from day to day
"Learning limited"	Meta expects the ad set won't reach about 50 results a week. It isn't a penalty
Events Manager	Where you see what the pixel records. Its "Test events" tab is where you check a test order
"Higher intent"	A type of Meta lead form that adds a screen where people review their details before they submit
CRM	The software or spreadsheet where you keep your leads and customers. A spreadsheet does the job at first
Break-even	The most you can spend on ads for one sale or one lead without losing money
Target cost	What you want to spend on ads for one sale or lead, below break-even, so you keep a profit. If you're not sure, start at half of break-even

THE SHORT VERSION

- The math comes first, and it starts from your margin. Say you sell a sheet set for $120 and keep $30 after costs. To break even, you need at least $4 in sales for every $1 of ads. At $3 you lose money on every order.
- Tracking comes before ads. Meta spends your money based on the numbers it receives, so you set it up and check it with a test order before you spend a dollar.
- Pick the objective based on how you sell: "Sales" for a store and for bookings paid online, "Leads" for services and for companies that sell to companies, Messenger when your customers would rather message. "Traffic" almost never.
- Budget is math. Meta learns who to show your ad to after about 50 results a week. At a $15 target cost per order, that's about $107 a day. If you don't have it, put everything in one ad set.
- Start small: one campaign, one ad set, and 3 to 6 ads that are actually different.
- For the first 7 days you change nothing and just watch. At 3 weeks you decide. The full timing rule is in chapter 5.
- New ads go in after day 7, when Meta shows "Creative limited" or "Creative fatigue," or at the 3-week read if your real cost is above target. Not because you're tired of looking at them.

After you close this guide

WHEN	WHAT YOU DO	CHAPTER
Today, in 30 minutes	Fill in the worksheet	1
Today	Pick the example closest to your business and redo it with your numbers	10
This week	Set up the account, security, and tracking	2 and 3
Next week	Make 3 to 6 ads and launch your first campaign	7 and 8
After 3 weeks of running	Make a written decision: raise the budget, keep it, or change the ads	9 and 14

01 THE MATH: WHAT YOU CAN PAY FOR A SALE OR A LEAD

Say you run an online bedding store and sell a sheet set for $120. After the product, shipping, and card fees, you keep $30.

You open Ads Manager and see your ads bringing in $3 in sales for every $1 you spend. Sounds good, right? You're losing money on every order, no matter how nice the number looks.

How much you can pay for a sale comes from your business, not from Ads Manager. The most you can spend on a sale is the profit it leaves you. That's your break-even: $30 per order for the bedding. Above it you lose money on every sale, so you work with a lower number, your target cost. If you don't know yet how much you want to keep, start at half of break-even, $15. The margin is 25%: $30 out of $120.

ROAS isn't profit

For a store, ROAS is the first number you see in Ads Manager: the value of the orders divided by what you spent on ads. A ROAS of 4 means $4 in sales for every $1 in ads.

That number tells you nothing about money until you set it next to your margin. At a 25% margin, you need at least $4 back for every $1 just to break even. At $3 you lose: a $120 order costs you $40 in ads, you keep $30, so you're down $10 an order.

To find the ROAS below which you lose money at any margin, divide 100 by your margin as a percentage. At 36%, 100 divided by 36 is 2.78.

YOUR MARGIN	10%	15%	20%	25%	30%	40%	50%	60%
Break-even ROAS, order value before tax	10	6.67	5	4	3.33	2.5	2	1.67
Break-even ROAS, order value includes 7% sales tax	10.7	7.13	5.35	4.28	3.57	2.68	2.14	1.78

Sales tax isn't revenue

You collect sales tax for the state, so it never belongs to you and stays out of your margin. Figure your margin on the product price minus discounts, without the shipping you charge. The shipping label you pay is a cost.

The catch is what your pixel sends Meta. Shopify, for example, says the order value in its Meta events is the order's total price, which it defines as the sum of the item prices including duties, taxes, and discounts. Then every ROAS in Ads Manager reads a bit higher than the money you keep. Shopify's page doesn't mention shipping, so check it in your test order. If the value Meta gets includes shipping, ask your developer to leave it out, the same as tax.

Take the bedding store with a 7% average sales tax. A $120 set goes to Meta as $128.40. Break-even read in Ads Manager is no longer 4, it's 4.28. Say Ads Manager shows 4.1 and you think you're above 4. You're not: each order cost you $31.32 in ads and left you $30. You lose $1.32 an order, and the real ROAS is 3.83.

Two ways to keep it straight: have your developer send the order value without tax, or divide any ROAS you read in Ads Manager by 1 plus your average tax rate. At 7%, a 3.0 in Ads Manager is really 2.8. The test order in chapter 3 shows you which case you're in.

Meta also adds tax to the ads themselves in a few states, based on your ad account's "Sold To" address: Washington sales tax since October 1, 2025, Alaska's local sales tax, the general excise tax in Hawaii, and the gross receipts tax in New Mexico (Meta's page calls both GET). If that's you, the tax shows as a separate line on your Meta receipts. Count it as ad cost.

The worksheet

ROW	HOW YOU FIND IT	EXAMPLE: THE BEDDING STORE	EXAMPLE: THE AUTO REPAIR SHOP IN CHAPTER 10	YOUR NUMBER
1. What you take in on an average sale	From your store or invoices, before sales tax and without the shipping you charge	$120	$650	
2. What the sale costs you	The product or parts, the shipping label, card fees, packaging, labor you pay per job. No sales tax	$90	$455	
3. What's left before ads	Row 1 minus row 2	$30	$195	
4. Margin	Row 3 as a percentage of row 1	25%	30%	
5. Sales needed per $1 of ads to break even	Stores only. 100 divided by your margin percentage	4	doesn't apply	
6. Out of 10 people who ask for a quote or leave a number, how many become customers	From your notebook or CRM. Otherwise count your last 20 leads	doesn't apply	4 out of 10	
7. The most you can spend on ads for one sale or customer	Same as row 3	$30	$195	
8. The most you can spend on one lead	Only if you sell through leads. Row 7 times how many of 10 become customers, divided by 10	doesn't apply	$78	
9. Target cost per sale or customer	Row 7 minus what you want to keep. If you don't know yet, half of it	$15	$97.50	

ROW	HOW YOU FIND IT	EXAMPLE: THE BEDDING STORE	EXAMPLE: THE AUTO REPAIR SHOP IN CHAPTER 10	YOUR NUMBER
10. Target cost per lead	Same idea, from row 8	doesn't apply	$39	
11. Weekly budget for 50 results	Target cost of what Meta counts, times 50	$750	$1,950	
12. Daily budget	Row 11 divided by 7	about $107	about $279	

Fill in rows 11 and 12 after chapter 5. If your pixel sends values with sales tax, keep the worksheet as it is and adjust only what you read in Ads Manager, as above, so you don't adjust twice. For contracts and subscriptions, put the value and costs for the months a customer usually stays in rows 1 and 2; example 4 in chapter 10 shows how.

Do this now

- [ ] Pull the numbers from your store, your invoices, or your order book.
- [ ] Fill in the worksheet row by row. It takes about 30 minutes.
- [ ] Keep it next to your computer. You'll use it when you set the budget and every Monday when you read your results (chapter 9).

02 GETTING THE ACCOUNT RIGHT

Whose name is your business's Facebook Page under? Yours, or the agency you worked with a few years ago?

If you had to think about it, this chapter is for you. Before you spend your first dollar, your Facebook Page, Instagram account, ad account, and pixel need to live together in one business portfolio under your company's name, with two admins. And the ad account should be in US dollars and your time zone from day one.

Some of these things are hard to fix once they're wrong. Picture a made-up shop, "Example Auto Repair." The owner creates a business portfolio under the shop's name with a company email and adds the Page, the Instagram account, the ad account, and the pixel. He and one person he trusts at the shop both have full control, and both use two-factor authentication. That's your target too.

The business portfolio

The business portfolio is what used to be called Business Manager. You'll find it in Meta Business Suite.

Without it, you can still hit "Boost" on a post, but you don't control who has access, what gets tracked, or the billing. Those are exactly the things that matter for your money.

The steps, per Meta:

1. Go to business.facebook.com and log in with your Facebook profile.
2. Open the dropdown under "Home" in the top left and choose "Create a business portfolio."
3. Enter your business name exactly as it appears in public, with no special characters.
4. Enter your name and a business email. Meta uses it to reach you; customers don't see it.
5. Confirm the email.
6. Add your Facebook Page, Instagram account, ad account, and pixel.
7. Add a card or other payment method in the ad account's payment settings.

Two Meta rules you'll run into fast. You can personally create up to 2 business portfolios. And a Page, an ad account, or a pixel can belong to only one portfolio.

That second rule is why we asked about the Page. If it's still in an old agency's portfolio, get it back before you build anything on it.

One more thing: new businesses don't get every ad feature right away. In "Business Support Home," Meta shows which features you have and what you need to do to get the rest.

Currency and time zone

When you create the ad account, choose US dollars and your time zone from the start.

It sounds minor, but it's hard to undo. Meta lets you change the currency once every 60 days, and only with no balance due, and doing it actually creates a new ad account. The old one is closed (you can still see it), and your reporting ends up split between the two. On monthly invoicing you can't change it at all.

Security, before the first dollar

On day one:

- [ ] Two-factor authentication or a passkey for everyone, with backup codes saved
- [ ] Two people with full control of the portfolio, so you're not locked out if one account goes down
- [ ] Everyone in the portfolio uses a work email, not a personal one

Once a month:

- [ ] Remove people who haven't logged in for 90 days and anyone without two-factor authentication or a passkey
- [ ] Keep full control to 10 people or fewer
- [ ] Close ad accounts that haven't run ads in a year

If your account gets restricted

It happens to honest businesses too, especially with new accounts. Meta's steps:

1. On a computer, open "Business Support Home."
2. Under "Account Overview," click the restricted account.
3. Look at "What you can do" and follow the steps there.

Usually it's one of four things: confirm your identity, finish verification, secure your account, or request a review.

Only an admin can request a review. One more reason to have two.

And don't open a new account to get around the restriction. Request the review on the original account instead.

The account sheet

Fill it in now with your business's details.

WHAT YOU WRITE DOWN	YOURS
Business portfolio name	
Business email on the portfolio	
Admin 1	
Admin 2	
Ad account currency	US dollars (USD)
Time zone	
Payment method added	yes / no
Two-factor authentication or passkey for everyone	yes / no
Sales tax line on your Meta receipts (Washington and anywhere else it appears)	

03 TRACKING: HOW META FINDS OUT WHO BOUGHT

Meta looks for customers who resemble the ones it sees buying. If it can't tell who bought, who asked for a quote, or who booked, it hunts for buyers using the wrong numbers, and it spends your money doing it.

An online store for leather bags gets 40 orders in one week, but the pixel only sees 20. If that's your store, as far as Meta knows, your ads work half as well as they really do, and it spends your budget based on that wrong number.

That's why tracking gets set up and checked before your first dollar.

The pixel and the Conversions API

The pixel is code on your site that records what people do there: view a product, add to cart, buy. It runs in the visitor's browser, so it misses orders when a page loads slowly, when someone uses an ad blocker, or when the browser cuts cookies.

The Conversions API sends the same orders and leads straight from your store platform or CRM, not from the browser. Data sent server to server can't be blocked by browser ad blockers. It can also send what happens later: a sale in your physical store or a lead that qualified in your CRM.

Meta recommends using both, with the same events.

The events Meta counts

Meta calls each action it counts an "event." One is your main event, and Meta looks for customers based on it. The others show the path people take to get there. The names in parentheses are the ones you'll see in Events Manager.

TYPE OF BUSINESS	WHAT META COUNTS AS A RESULT	WHAT ELSE IT COUNTS ALONG THE WAY
Online store	The paid order (Purchase), with value and currency	Product viewed, added to cart, checkout started
Services that book appointments or send quotes	The form submitted (Lead) or the appointment booked (Schedule)	A tap on your phone number or a message (Contact)
Bookings	The booking (Schedule), the order (Purchase) if guests pay a deposit online, or the conversation started if you book through Messenger	A tap on your phone number or a message
Companies that sell to companies	The form submitted (Lead), then the stages from your CRM	A tap on your phone number, visits to your pricing page

For a store, every order has to reach Meta with its value. Without the value there's no ROAS.

How to put them on your site

For a small business, in this order:

1. If your site is on Shopify, WooCommerce, Wix, or BigCommerce, use the platform's official Meta integration. It's a few clicks and costs nothing extra. On Shopify, in the "Facebook & Instagram" sales channel, go to "Data sharing settings" and choose "Enhanced" or "Maximum," which use the pixel plus the Conversions API. "Standard" is the pixel alone, the setup that misses orders. On other

platforms, find Meta's official integration in the app or plugin list and pick the level that includes the Conversions API.

2. If your platform has no integration, turn on the free "Meta-enabled Conversions API," which Meta sets up in one click. It only covers website actions.
3. A direct connection to your CRM, built in code, is worth it only once you get at least 200 leads a month from Meta's form and want Meta to look for the people who become customers. Meta's guidelines for that CRM setup are Instant Forms leads and at least 200 a month, and it puts the time to value at about a month.

The test order

In Events Manager, open your pixel (Meta also calls it a "Dataset") and the "Test events" tab. Open your site from there, place a test order or submit a test form, and check that it shows up once, and for a store, with the order value. Is that value with or without sales tax? That answers the question from chapter 1.

If you only take leads by phone or Messenger, check that tapping the call or message button shows up.

The warning sign: Ads Manager shows twice as many orders as your store, because the same order arrives from both the pixel and the server and Meta doesn't recognize it as one. Official integrations handle this on their own; on a custom-built site, it's a line on the developer page below.

If an old tutorial tells you to set up "8 priority events" or verify your domain for event configuration, skip it. Meta says you no longer need to prioritize 8 events per domain. You can still verify your domain for other reasons, but tracking doesn't need it.

Data you can't send

Meta's Business Tools terms prohibit sending health information, financial information, and other sensitive data about people, and that includes event names, URL parameters, and audience rules. A page address like /book-diabetes-treatment is a problem on its own. Clinics, wellness brands, and lenders get extra restrictions on top; chapter 12 has the details.

US privacy, in practice

The US has no EU-style rule that the pixel can't fire until a visitor clicks "Accept." What it has is a growing set of state privacy laws (24 states as of late October 2026) built around the right to opt out of the "sale" or "sharing" of personal data and of targeted advertising. Sending visitor data to Meta to target ads is exactly what those opt-outs are about.

- Check whether the laws reach you. California's applies to businesses with more than $26,625,000 in annual revenue (the 2025 and 2026 figure, adjusted every two years), or that buy, sell, or share the data of 100,000 or more California consumers or households, or that make half or more of their revenue from selling or sharing personal data. Other states use other tests, so check the ones where your customers live.

- If you're covered, put a "Do not sell or share my personal information" link (or your state's version) on your site and honor the Global Privacy Control signal from browsers. California's regulations require businesses to process such opt-out preference signals as a valid request to opt out of sale and sharing.
- When someone opts out, tell Meta with its "Limited Data Use" setting, which currently covers people in 14 states. The code is on the developer page.

Some consent tools for Shopify and WordPress handle the link, the signal, and the Meta setting together. Check that yours actually sets Limited Data Use for Meta, or ask your developer.

Health and wellness businesses with customers in Washington are the exception to "no banner by default": the state requires separate opt-in consent to collect consumer health data and to share it, even for small businesses (chapter 12).

Your developer's part

The next page is written for them. You fill in one line on it, what Meta counts for you, taken from the table above. Then send it as is and ask them to check off every line. When they're done, you run the test order yourself.

The URL parameters and campaign names you set yourself in Ads Manager, on your first campaign. We get to them in chapter 8.

The developer page

Hi! We're sending you this page so you can set up Meta tracking on our site and check off each line below. Each line helps Meta count what we count in our store, on the phone, and in our invoices.

What Meta counts for us (main event): ____

Events

- [ ] Main event, by type of business: Purchase with order value and currency USD for a store; Lead (form submitted) or Schedule (appointment booked) for services; Schedule, or Purchase if there's an online deposit, for bookings; Lead for business-to-business.
- [ ] Send the order value before sales tax if the platform allows it. If it doesn't, tell us, so we read ROAS the right way.
- [ ] CRM stages get sent only if we have at least 200 leads a month and ask you for it separately.
- [ ] Supporting events: ViewContent, AddToCart, and InitiateCheckout for a store; Contact (tap to call or message) for services and bookings.

Pixel and Conversions API

- [ ] Pixel plus Conversions API, with the same events.
- [ ] For the Conversions API, in this order: the site platform's official integration; if there isn't one, the "Meta-enabled" option; a direct integration in code, from the CRM, only if we have at least 200 leads a month and ask for it separately.

- [ ] If events are sent by custom code, the pixel and the server send the same event name and the same `event_id` for the same action. That's how Meta deduplicates and doesn't count an order twice.
- [ ] Every order or lead sent from the server includes the customer's email and phone. That raises "Event Match Quality," the 0 to 10 score Meta uses to show how well it matches events to real accounts. Email and click ID matter most.
- [ ] Per Meta, aim for Conversions API events to cover at least 75% of pixel events, sent as close to real time as possible.

Privacy opt-outs

- [ ] If the site has an opt-out link or receives a Global Privacy Control signal, people who opt out are sent with Limited Data Use. If a consent tool handles it, confirm it's on. Otherwise, add this before `fbq('init')`.

COPY THIS

```
fbq('dataProcessingOptions', ['LDU'], 0, 0);   // for visitors who opted out; Meta geolocates the state
fbq('dataProcessingOptions', []);              // for everyone else, LDU explicitly off
```

- [ ] Conversions API events for the same people carry `data_processing_options: ['LDU']`, with `data_processing_options_country: 0` and `data_processing_options_state: 0`, so the server honors the opt-out too.

Prohibited data

- [ ] Nothing about health, finances, or other sensitive topics in event names, parameters, or page URLs.
- [ ] No tracking on pages behind a patient login or on public pages where visitors type in health information (booking or symptom forms).

The form and URL parameters

- [ ] Ad links will carry `utm_source`, `utm_medium`, `utm_campaign`, `utm_content`, and `utm_term`. We add them in the ads. Your part is on the site: a hidden field in the quote form that picks up `utm_content` from the page URL, so every lead arrives with the name of the ad that brought it.

The test

- [ ] At the end, a test order or form shows up in "Test events" in Events Manager exactly once. For a store, with the order value.

Thank you!

04 THE OBJECTIVE: WHAT YOU ASK META FOR

You run an online mattress store. For your first campaign you pick Traffic, because clicks are cheap. A few days later you have lots of visits, all of them cheap, and almost no orders.

People clicked and left, which is what the store asked for. That's the whole chapter: **pick the objective based on how you sell**, because Meta brings you exactly what you ask for. Ask for Traffic and it brings people who click. Ask for Sales and it brings people likely to buy.

The 6 objectives

When you create a campaign in Ads Manager, the first thing it asks for is the objective. There are 6:

OBJECTIVE	WHAT IT'S BUILT FOR, PER META	WHEN TO USE IT
Awareness	reaching as many people as possible who'll remember your ad	a new brand, a new store or restaurant
Traffic	sending people to your site, app, or Page	rarely; when you really want visits, say to an article
Engagement	messages, video views, reactions, and other actions on your ad or Page	when you want people to start a conversation in Messenger
Leads	contact details through forms, messages, or calls	services, business-to-business, bookings confirmed by phone
App promotion	installs and actions in your app	only if you have an app
Sales	people likely to buy	online stores, bookings paid online

The conversion location

The objective is only half the choice. The other half is where the person's path ends: on your website, in a form, in a conversation, or on the phone. Meta calls it the "conversion location," and you set it at the ad set level, in the "Conversion" section. Under Leads, besides the single options below, you'll see combinations like "Website and instant forms" (leads from both, useful when you don't know yet what works for you) and "Website and calls."

Read this list from the top and stop at the first "yes":

1. Do people pay on your website? Choose Sales with the "Website" location. Meta counts the paid order.
2. Do you have an app and want installs? Choose App promotion.

3. Do you sell to other businesses? Choose Leads with "Instant forms" (Meta's form, filled in without leaving the app) and the "Higher intent" form type, with 2 or 3 qualifying questions (chapter 8 has examples). You check which leads come from the right kind of company, your qualified leads, and judge the campaign on cost per qualified lead.
4. Do people talk to you before they buy (a quote, an appointment, a booking without online payment)? Choose Leads, and pick the location like this:
    - you call every lead back the same business day: "Instant forms," "Higher intent" type;
    - you have a working booking page on your site and the pixel counts it correctly: "Website";
    - people want to talk right now (restaurants, towing, emergency repairs): "Calls";
    - your customers would rather message than fill out a form (lodging, events, home services): switch the objective to Engagement and choose Messenger as the destination. Meta describes Engagement as the objective that reaches people more likely to start a conversation in Messenger. Do it only if someone answers messages fast.
5. Opening something new and just want people to know? Choose Awareness, with a small budget for a short time. Otherwise, no.

Why Messenger and not texts? Plenty of US small businesses take bookings by call or text, and customers like it. But an ad can't drop someone into your phone's text thread, and Meta can't count texts. Messenger conversations it can count. So send the ad to Messenger or to a call, put your number in the ad and on your Page for people who'd rather text, and count those yourself.

A word on "Higher intent." It adds a screen where people review their details before submitting the form. The merely curious drop off, so you get fewer leads but better ones. Meta suggests it when every lead needs follow-up or qualifying. It only shows on phones, in Facebook Feed and Instagram Feed.

The default, "More volume," is built for lots of leads you won't call one by one. This guide assumes you call every lead, so it recommends "Higher intent."

If you want Meta to bring only the good leads

There's a performance goal called "Maximize number of qualified leads": Meta looks for the people likely to become customers. Since April 2026, Meta no longer lets you pick it for a new campaign without a Conversions API connection to your CRM, and since August 2026 the change reaches existing campaigns too. The connection is how Meta learns which leads turned out well, and it works with leads from Meta's form.

If your CRM isn't connected, stay on "Maximize number of leads" and qualify the leads yourself, on the phone.

Once you're at 200 or more form leads a month, you can have a developer connect your CRM. Then Meta can look for the people who become customers.

Your choice, in one line

BUSINESS	OBJECTIVE	LOCATION	WHAT META COUNTS
online store	Sales	Website	the paid order
auto repair shop	Leads	Instant forms, "Higher intent"	the form submitted
bed and breakfast, no online payment	Engagement	Messenger	the conversation started
office cleaning company	Leads	Instant forms, "Higher intent"	the form submitted
your business			

Fill in the last row before you move on.

For the repair shop, Meta counts the submitted form, because the form is all it can see. Whether the person actually came in, only you know, from your lead sheet (chapter 9), and that's where you judge cost per customer.

05 BUDGET AND THE LEARNING PHASE

How much should you spend a day? Start from one number: Meta learns who to show your ad to after about 50 results a week. For the bedding store in chapter 1, with a $15 target cost per order, that's about $107 a day.

The "result" is whatever you told Meta to count: an order, a lead, or a conversation. Below you'll see where the number comes from and what to do if your budget is smaller.

The learning phase

Per Meta, an ad set leaves the learning phase after about 50 results in the week after its last significant edit. Until then, results swing from day to day and the cost per result is usually higher, so the first days tell you little, even if you're itching to change something.

If Meta sees the ad set won't reach about 50 results, it labels it "Learning limited." That's not a penalty. It just tells you the budget isn't being used well with the current setup.

To see how many results an ad set has collected since its last significant edit, add the "Last significant edit" column in Ads Manager (open "Columns") and put it next to "Results."

From cost per result to budget

The math is simple. Cost per result times 50 gives you the weekly budget. Divide by 7 for the daily budget.

For the bedding store, an order leaves $30 and the owner starts from half, a $15 target cost. He needs $750 a week, $15 times 50, which is about $107 a day. For the auto repair shop in example 2, the target is $39 a lead: $1,950 a week, about $279 a day.

COST PER RESULT	WEEKLY BUDGET FOR 50 RESULTS	DAILY BUDGET
$15, an order at the bedding store	$750	about $107
$30, an order at the knife store (example 1)	$1,500	about $214
$32.50, a conversation at the bed and breakfast (example 3)	$1,625	about $232
$39, a lead at the repair shop (example 2)	$1,950	about $279
$162, a lead at the cleaning company (example 4)	$8,100	about $1,157
your cost		

These are target costs from this guide's examples, not market averages. Meta also has a minimum budget that varies by country, objective, and settings; if you're under it, Ads Manager shows an alert.

If your budget can't reach 50 results a week

If the math comes out above what you can spend, Meta's page on "Learning limited" gives these fixes:

1. Combine ad sets. Three ad sets at $30 a day learn less than one at $90.
2. Broaden your audience.
3. Optimize for something that happens more often. Meta's example is add to cart instead of purchase. For services with a form on your website, that means the submitted form instead of the booked appointment. Keep in mind Meta will then look for people who add to cart or fill out a form, not necessarily people who pay or show up. You still count real sales yourself, from your store, your phone, and your invoices.

   Our rule of thumb (not Meta's): if the ad set brings at least 10 purchases in 30 days, about 2 to 3 a week, stay on purchase with a single ad set. Below that, switch to add to cart. "Purchase" here means the store order, the appointment booked on a clinic's website, or the paid booking at a B&B. For a repair shop using Meta's form, the lead is all Meta can see, so stay on it.

   To switch:

   - Open the ad set in Ads Manager.
   - In the "Conversion" section, change the conversion event from "Purchase" to "Add to cart." For a form on your website, change it from "Schedule" to "Lead."
   - Save.

The switch restarts learning. Do it at launch or at the 3-week decision, never in the first 7 days.

4. Raise the budget, if you can.
5. Raise your bid or cost control, if you set one that's too low to get enough results.

And now the timing rule that every other chapter points back to:

- For 7 days after launch, change nothing and just watch: no budget changes, no new ads, no pausing ads.
- At 3 weeks, do your first real read and decide.
- If the ad set is "Learning limited," confirm the budget decision at 30 days of running.
- If you sell to other businesses, judge contracts at 60 days.
- You can note your real cost after 7 to 10 days, but the budget only changes at one of those decision points.

You can also cap your cost per result with the "Cost per result goal" bid strategy. In that case Meta recommends a daily budget of at least 5 times the goal. At a $20 goal, that's at least $100 a day.

Edits that restart learning

An ad set goes back into learning when:

- you change the audience, the creative, the optimization event, or the bid strategy, or add a new ad;
- you pause the ad set for 7 days or more;
- you change the budget by a lot.

Meta's own example: going from $100 to $101 isn't likely to matter; going from $100 to $1,000 may. So raise the budget in small steps.

The steps

1. Take the target cost from your worksheet.
2. Multiply it by 50 for the weekly budget.
3. Divide that by 7 for the daily budget.
4. After 7 to 10 days, note the real cost from Ads Manager. Change the budget only at the 3-week decision.

06 THE AUDIENCE: WHO META SHOWS YOUR AD TO

You sell occasion dresses. You build the ad, check "Women," and move on. Later you see the ad reached men too. That's not a mistake. With Advantage+ audience on, Meta shows it to them if it thinks that sells more.

Advantage+ is Meta's name for its AI automation of the audience, placements, budget, and creative. With Advantage+ audience on, interests, age, gender, and your own audiences become suggestions, and Meta also shows the ad to others when it expects better results.

Only four things stay hard limits, which Meta calls "audience controls": location, minimum age, languages, and custom audiences you exclude. If reaching a specific audience matters more to you than cost, the "Further limit your audience" option turns suggestions into limits.

That gives you the rule for this chapter. **Start broad: set location, minimum age, and language, and leave the rest to Meta.** There are two exceptions, below.

The ad itself now does a lot of the targeting. For each person, Meta picks a few fitting ads out of a huge pool. An ad that says in the first second "e-bike for your commute, 40 miles on a charge" reaches commuters more easily than a product shot on white with the "commuting" interest checked. Say who it's for in the ad, not in the checkboxes.

Leave the automation on when:

- your tracking is right (chapter 3). Advantage+ works with what it gets, and with bad data it goes wrong faster than you would;
- you have one clear objective;
- you sell across a wide area, the whole country or a big metro.

Limit it in two cases. The first is retargeting, ads only for people who visited your site: Meta itself says Advantage+ audience isn't recommended there. The second is a local business with a small radius, a salon in one neighborhood or a repair shop in a small town. Location is a limit Meta won't cross, with one exception: the "Reach more people likely to respond to your ads" option. If it's checked, your ads can go outside your area. For a local business, leave it unchecked.

Leave all placements on (Facebook and Instagram feeds, Stories, Reels, Messenger). Don't cut a placement just because its cost per result is higher, because Meta aims for the lowest average cost across the whole ad set, not in each placement. Cut one only if your ad looks bad there, say a horizontal video in Reels.

Custom audiences are worth building: from site visitors, your customer list, or people who engaged with your Page. Use them for retargeting. A store also uses them as an exclusion, so it doesn't pay to show ads to people who just bought. For a restaurant or repair shop it's the opposite: past customers are your best audience for another visit. Your customer list is the best hint you can give Meta. Clinics and practices don't upload patient lists, because the list itself says something about people's health.

To build one from site visitors, in Ads Manager open "Audiences," choose "Create audience," then "Custom audience," then "Website."

If your business runs ads about housing, jobs, or financial products and services, Advantage+ audience isn't available to you, and other targeting is limited too (chapter 12).

Don't split your audience into lots of ad sets. Meta's own example: three ad sets with the same ad, targeting "dogs," "dog toys," and "dog collars," can do worse than one ad set with all three interests, because each one learns from fewer results. If you want to see men and women, or states, separately, use "Breakdown" in Ads Manager reporting. It splits results by age, gender, region, and more, without separate ad sets.

Keep interests for an A/B test: a broad ad set against an interest-based one, same budget. Don't test by turning ad sets on and off yourself; Meta says that leads to unreliable results. In Ads Manager, click "A/B Test" in the toolbar, choose "Make a copy of this ad" or "Select two existing ads," change one variable (creative, audience, or placement), pick how the winner is decided, set the dates, and publish. You can also build and follow tests in Meta's Experiments tool.

The audience for your first campaign

SETTING	WHAT YOU CHOOSE
Location	The whole country, or your city plus the radius you serve
Minimum age	The age your customers can buy at
Language	Your customers' language
Everything else (interests, gender, max age)	Broad, with Advantage+ audience on
"Reach more people likely to respond to your ads"	Unchecked, for a local business
Placements	Advantage+ placements, all on
Exclusions, for a store	People who already bought

07 THE ADS

An e-bike store makes three ads. In the first, a commuter rides to work in the morning, shot on a phone. The second puts the bike next to a cheap one and shows the difference. The third is a plain image with the price stated up front.

Those are three different reasons to buy. One person sees himself on the ride to work, another wants to know why to pay more, a third just wants the price.

So make 3 to 6 ads that are actually different: a different angle, person, format, and reason to buy. To Meta, ten versions of the same photo very likely look like one ad.

Different means a different angle

A Meta spokesperson told Marketing Brew that diversifying creative is a "longstanding best practice as we see it deliver measurable results."

In the same article, an agency media director said Meta has been telling advertisers that ads with the same look or the same opening hook get treated as essentially the same ad. It isn't a written Meta rule, but the direction is clear.

Angles to try

Pick 3 to 6 from the list that fits your business.

Online store

- the product in a customer's hands, shot on a phone;
- the comparison with the cheap version;
- the main objection answered: shipping, returns, or warranty;
- the price, stated plainly.

Services that book appointments

- the owner or specialist talking to the camera for 30 seconds;
- a real job, with the customer's permission;
- "what it costs and how long it takes," said in the first 3 seconds.

Bookings

- the place filmed when it's full;
- the room or the menu, no filters;
- the dates and the offer, in big type.

Companies that sell to companies

- one specific customer problem, named in the first sentence;
- a simple savings calculation;
- the founder explaining how the company works.

People on camera, filmed vertically, with captions, tend to work. For Reels ads, Meta calls captions recommended and sound strongly recommended.

The button says the next step. For a store, "Shop now." For leads, "Get quote" or "Book now." For Messenger, "Send message." For calls, "Call now."

Clinics and practices need to watch one rule: Meta doesn't allow ads that assert or imply the advertiser knows something personal about the viewer, health included. "New treatment options for type 2 diabetes" is about your service. "Do you have diabetes?" implies you know about the viewer's health, and that's what gets rejected. Talk about the service, not the person's condition.

The ad brief

Before you make an ad, fill out its brief. It takes a few minutes and saves you from ads that look alike without you noticing.

FIELD	WHAT YOU WRITE
Angle	Why someone would buy: price, speed, safety, result, convenience
Who it talks to	One specific person, "a mom who drives two kids to school," not "women 25 to 45"
First 3 seconds	What people see, hear, and read on screen
Proof	What shows it's true: the product in use, the price, the place, the person doing the work
Offer	Price, deadline, and conditions, with numbers
After the click	Which page, form, or conversation is waiting
Format	9:16 for Reels and Stories, 4:5 for feeds

If two briefs come out the same, you have one ad, not two.

Starter copy

Below is one text per type of business. Fill in what's in square brackets with your real details. If you can't fill a field honestly, delete it, don't make it up. The first sentence says who the ad is for and what they get, because on a phone the text gets cut after the first lines.

Online store

COPY THIS

[Product] for [the real situation where people use it]. [The detail that decides it: range, material, size, capacity].
Ships in [X] business days, [Y]-day returns. $[price].
Order on our site and pay by card, Apple Pay, or PayPal.

Headline (up to 27 characters): [Product], $[price]

Services that book appointments or send quotes

COPY THIS

[Service] in [your city], with appointments [this week / within X days].
Prices start at $[X]. We'll give you an exact price once we [see the car / talk on the phone / see the photos].
Leave your number and we'll call you [today / today, or tomorrow morning if it's after hours].

Headline: Appointments in [X] days

Bookings

COPY THIS

[Your place] in [the area], with [what makes it different: the view, the porch, the breakfast].
We still have rooms open on [real dates]. $[price] a night, [breakfast included].
Message us the dates and how many guests, or call or text [number].

Headline: Rooms open [date]

Companies that sell to companies

COPY THIS

[The customer's problem, in their words. For example: "The office only looks clean on Mondays."]
[What you do, with a number you can prove: turnaround, starting price, what's included.]
Leave your details and we'll send a proposal within [X] business days.

Headline: Proposal in [X] days

The steps

1. Open the Meta Ad Library at facebook.com/ads/library. It's free and shows all active ads running on Meta's apps. Look at 3 to 5 competitors: which ads they're running and how long each has been

running.

2. Fill out a brief for each ad.
3. Write the copy, starting from the templates above.
4. Make the images and videos to the specs below.
5. Before you publish, check in the preview what Meta changes on its own (more on that below).

Sizes, per Meta's ads guide

Specs change, so check them at facebook.com/business/ads-guide before you produce anything.

FORMAT AND PLACEMENT	RATIO	RESOLUTION	TEXT	TECHNICAL LIMITS
Image, Facebook Feed	4:5	1440 × 1800 px	Primary text 50 to 150 characters, headline 27	JPG or PNG, up to 30 MB, at least 600 px wide
Video, Facebook Feed	4:5	1440 × 1800 px	Same as image	MP4, MOV, or GIF, H.264, up to 4 GB
Video, Instagram Reels	9:16	1440 × 2560 px	Primary text 44 characters	MP4 or MOV, up to 15 minutes and 4 GB
Carousel, Facebook Feed	1:1	At least 1080 × 1080 px	Primary text 80, headline 20, description 18 characters	2 to 10 cards

The Reels safe zone. Keep the top 14%, the bottom 35%, and 6% on each side free of text and logos, because that's where the account name, the button, and the caption sit. Whatever you put there, people won't see.

Music. Reels ads can't use licensed music, even if you have the song on your phone. Meta recommends your own audio or royalty-free tracks from the Meta Sound Collection.

Meta's automatic changes

"Advantage+ creative" (the setting where Meta automatically adjusts your ad) changes images and text to get more responses. It can add music, animation, text over the image, or color tweaks, and some of these are on by default.

In the preview, turn off the ones that don't fit. A dental practice doesn't want music on an implant ad, and a jewelry store doesn't want text over the product.

When an ad wears out

When people have seen the same ad too many times, the cost goes up. Meta flags it in the Delivery column with two statuses:

- "Creative limited": the cost per result went up, but it's still under twice what your past ads cost;
- "Creative fatigue": the cost has reached twice that or more.

Meta's fix is a new ad that's clearly different. It also notes that keeping the old one running may get you more results than pausing it. Before you decide, check whether the ad still brings real sales or leads, not just Meta's count.

Add the new ad after the first 7 days, because it restarts learning (the timing rule in chapter 5). To have it ready in time, fill out its brief now.

08 YOUR FIRST CAMPAIGN, STEP BY STEP

One campaign, one ad set, 3 to 6 ads. Before you press the first button, have the objective (chapter 4), the daily budget (chapter 5), and the ads (chapter 7) ready.

We'll follow the auto repair shop from example 2: a Leads campaign with one ad set, a "Higher intent" form, Dayton plus 15 miles, $40 a day, and 4 ads.

The campaign

1. In Ads Manager, click "+ Create."
2. Choose the objective and click "Continue." The repair shop picks Leads. On the right you may see a "campaign score," Meta's prediction of how well set up the campaign is before you publish. Apply only the recommendations you understand.
3. If you're advertising jobs, housing, or financial products and services, or anything about social issues, elections, or politics, select "Special Ad Categories." Details in chapter 12.
4. Name the campaign: short, with no spaces, because the name goes into the ad's link. Use the same rule for the ad name in step 12.

COPY THIS

Campaign: Objective_What-you-promote_Audience_Month for example: Sales_Full-line_Broad-US_2026-11
Ad: Format-angle_v1 for example: Video-owner-price_v1

5. Leave "Advantage+ campaign budget" on, so the budget sits on the campaign and not on each ad set. Enter your daily budget from chapter 5 here (the repair shop: $40) and click "Next."

The ad set

6. Under "Conversion," choose where the result happens: Website, Instant forms, or Calls (for Messenger, see the Engagement setup at the end of this chapter). The repair shop picks Instant forms.

7. Under "Performance goal," choose what Meta counts as a result. For Sales, "Maximize number of conversions." For Leads, "Maximize number of leads," or "Maximize number of qualified leads" only if your CRM is connected through the Conversions API (chapter 4).
8. Under "Dataset," choose your pixel and the event to count, if the location you chose asks for it.
9. In the audience, set location, minimum age, and language, and leave the rest broad (chapter 6). The repair shop sets Dayton plus 15 miles. For a local business, make sure "Reach more people likely to respond to your ads" is unchecked.
10. Leave placements on Advantage+ and click "Next."

The ad

11. Under "Ad setup," choose "Single image or video" or "Carousel." If you don't see them, click "More options."
12. Upload your media, write the primary text and headline, and choose the button (chapter 7). Name the ad by the rule in step 4.
13. Under "Destination," set where people end up: your web page, the form, or the conversation, matching step 6.
14. Under "Tracking," check that your pixel is selected and paste these five parameters into "URL parameters" as a single line, joined with "&" and no spaces.

COPY THIS

```
utm_source={{site_source_name}}
utm_medium=paid
utm_campaign={{campaign.name}}
utm_content={{ad.name}}
utm_term={{placement}}
```

The full line, once: `utm_source={{site_source_name}}&utm_medium=paid&utm_campaign={{campaign.name}}&utm_content={{ad.name}}&utm_term={{placement}}`

Meta fills in what's inside the braces: where the person came from, the campaign name, the ad name, and the placement. Three things to remember:

- campaign and ad names go into the link as they were when the ad was first published, so choose them well up front;
- changing parameters after publishing can send the ad set back into learning, so add them from the start;
- parameters in "URL parameters" override any with the same name typed into the website URL.

That gives you a second set of numbers that doesn't come from Meta, in Google Analytics and in the hidden form field your developer set up.

15. Check the preview for every placement and turn off any automatic change from Meta that doesn't fit (chapter 7).
16. Click "Publish."

The next day, the ad set should say "Learning" in the Delivery column, and Events Manager should be receiving events. If an ad gets rejected, read the reason, fix it, and resubmit it rather than building a new campaign. From here on, follow the timing rule in chapter 5.

If you use Meta's form

At the ad set level, choose "Instant forms," then build the form at the ad level:

1. Form type. Pick "Higher intent" if you call every lead: people get an extra screen to review their details, so you get fewer accidental submissions. "More volume" is the default, built for lots of quick leads. The repair shop calls everyone, so it picks "Higher intent."
2. Contact details. Add name, phone, and email as prefill questions, which Meta fills from the person's profile and the person can edit.
3. Your own 2 or 3 questions, the ones that tell you whether the lead is worth a call. Add them under "Questions" with "+ Add question."
4. Appointment request, if you need it. The "Appointment request" question lets people pick the day and time they'd like you to reach them. Per Meta, the available hours are Monday through Sunday, 7 am to 10 pm, and can't be changed, and with this question the ad only runs in the Facebook app on phones.
5. A link to your privacy policy. The page you already have on your site works. It can't be a PDF, an image, or a download.
6. The completion message, saying what happens next and when. Start from the example below.

COPY THIS

> We'll call you within two hours, between 8 am and 6 pm. If you reach us in the evening or on the weekend, we'll call you the next business morning.

If you'll follow up by text, add that to the form too. Under the FCC's TCPA rules, marketing texts sent with an autodialer need the person's prior express written consent, and some states are stricter. The safe default is written consent on the form: say plainly that they agree to get texts from you.

Questions to ask, by type of business:

TYPE OF BUSINESS	THE QUESTIONS	WHAT THEY TELL YOU
Services that book appointments	What do you need done? (options from your list) · What town are you in? · When would you like to come in?	Whether they're in your area and how urgent it is
Bookings	What dates? · How many guests?	Whether you have room, before you call
Companies that sell to companies	How many employees does your company have? · When would you like to start?	Whether it's the client you want and when they'll sign
Online store	Usually no form	The order happens on the site

Meta doesn't allow some questions. Among them: health (conditions, treatments, disabilities), finances (income, debt, credit score, bank account numbers), government ID numbers such as Social Security or driver's license numbers, criminal history, religion, sexual orientation, political affiliation, and union membership. With one of these in the form, the ad doesn't run.

At a dental practice, for example, you ask which service the person wants, from your list (cleaning, implant, whitening), not what's wrong with their teeth. If you're not sure a question is allowed, leave it out and ask on the phone.

You'll find your leads in two places:

- in Ads Manager, on the "Ads" tab, click "On-Facebook leads" in the results column and download the file;
- in Meta Business Suite: "All tools," "Instant forms," "Download."

Leads can only be downloaded for 90 days, so download them daily or connect a CRM. By default, only people with full control of the Page or messaging permissions can download them; if your caller can't see them, that's why. Meta recommends running lead ads when you can follow up fast, so if your ads run overnight, the morning's first calls go to the overnight leads.

If you use Messenger

This is the setup for the bed and breakfast in example 3, and for any business whose customers would rather message than fill out a form.

The steps, per Meta:

1. "+ Create," choose Engagement, "Continue";
2. name the campaign, then "Next";
3. under conversion location, choose "Message destinations" and select Messenger (you can add Instagram too), then choose your performance goal; for a B&B, the one that counts conversations;
4. set budget, schedule, audience, and placements as above;
5. on the ad, use the "Send message" button, and under "Message template" choose "Create new" and "Start conversations": a greeting plus a few questions people can tap to start the chat.

The question someone taps reaches you as their first message, so you know they came from the ad. Meta counts a conversation as "started" when someone messages you after at least 7 days of no messages, and shows it in the "Messaging conversations started" column.

For a B&B, the greeting could look like this:

COPY THIS

Hi! Tell us your dates and how many guests, and we'll send you rates and the rooms we have open. Rather talk? Call or text us at [number].

and three questions people can tap:

COPY THIS

What rooms do you have this weekend?
How much is a night for 2 people?
Do you allow kids?

09 HOW TO READ YOUR RESULTS

You run a supplement store. At the end of the month you open Ads Manager and see 100 orders from your ads. Then you check your store against a month with no ads: you only have 60 more orders.

60 is closer to the truth, though a month-to-month comparison isn't perfect either (season, promotions). Ads Manager is your starting point, not the verdict. The verdict is your store sales, your calls, and your signed contracts, set against your worksheet.

The gap between Meta's count and yours

Meta counts sales that didn't come straight from a click. It also credits sales from people who only saw the ad, or saw it the day before. That's why its number is usually higher than yours. On "attribution," that's all you need to know.

Sales tax and shipping. If the pixel sends the total with tax and your margin is figured without it, ROAS looks better than it is (chapter 1).

Returns and canceled orders. The pixel counts an order when it's placed. If the customer cancels, returns it, or disputes the charge, the order doesn't disappear from Meta. So once a month, compare Meta's orders with the orders you actually kept.

A step for later. Bigger stores can send Meta the profit on an order instead of its value, so Meta looks for high-profit orders. Meta ties this to the Conversions API and, per its help page, to a budget that covers about 100 or more conversions a week. If you use it, ROAS in Ads Manager no longer compares with your break-even from chapter 1, because it's not based on sales anymore. Until you get there, do the math by hand, with the worksheet.

For services: what a customer costs, not a lead

For services, judge on cost per customer won, not cost per lead.

Say you run a repair shop. Ten leads at $8 each where nobody shows up cost you $80 for nothing. One $40 lead that books the job is cheaper.

When you sell to other businesses, a contract usually takes a few weeks to sign. So in the first month you watch cost per qualified lead, and you judge contracts at 60 days.

At 200 or more form leads a month, have a developer connect your CRM to Meta, so it looks for people who become customers. Under 200, keep the sheet below.

The lead sheet

A spreadsheet in Excel or Google Sheets is enough, with these columns:

DATE	NAME	PHONE	AD IT CAME FROM	QUALIFIED? (YES / NO AND WHY)	PROPOSAL SENT (DATE, AMOUNT)	CUSTOMER? (YES / NO)	SALE AMOUNT

How to tell which ad a lead came from:

- from Meta's form, the downloaded file has the ad ID, which you can match in Ads Manager;
- from your website form, the hidden field your developer added (chapter 3);
- by phone, you ask: "How did you hear about us?"

At the end of the month, go to the "Ads" tab in Ads Manager and set the date range to last month. For each ad, divide what you spent on it by the number of customers it brought, the "yes" answers in the "Customer?" column. That's your cost per customer won, for each ad.

Meta's diagnostics for ads that aren't working

For every ad with at least 500 impressions, Meta shows three rankings against ads competing for the same audience: quality, engagement rate (how often people interact), and conversion rate (how many do what you asked). Each comes out below average, average, or above average. You'll find them on the "Ads" tab: click "Columns," then "Customize columns," and check "Quality ranking," "Engagement rate ranking," and "Conversion rate ranking."

Meta says to use them only on ads that aren't hitting their goals; an ad selling at the cost you want can rank below average with no problem.

How to read them, per Meta:

QUALITY	ENGAGEMENT	CONVERSION	WHAT IT MEANS	WHAT YOU DO
average or above	average or above	average or above	all good	leave it alone
below average	average or above	average or above	the ad looks weak	better creative, or show it to a different audience
average or above	below average	average or above	it doesn't spark interest	make it more interesting from the first second
average or above	average or above	below average	it doesn't convert	work on the button, the offer, or the page after the click
average or above	below average	below average	no interest, no conversions	change both the ad and what comes after the click
below average	below average	average or above	weak and uninteresting	remake the ad
below average	average or above	below average	the ad is clickbait or controversial	show exactly what you sell, with no promises you can't keep
below average	below average	below average	room to improve everywhere	try a different ad, audience, and page

Meta also says going from below average to average matters more than going from average to above average. So start with whatever is below average.

Ten minutes on Monday morning

Every Monday, four steps:

1. Open Ads Manager on the last 7 days.
2. Fill in that week's column of the Monday sheet, for each campaign.
3. Compare the real cost with your worksheet. For a store, compare cost per order with your target cost and break-even per sale. For services, compare cost per lead with your target cost per lead, and cost per customer (from your lead sheet) with your target cost and break-even per customer.
4. Decide using the rule below and write the decision on the sheet.

The Monday sheet:

LINE	WHERE TO FIND IT	WK 1	WK 2	WK 3	WK 4
Amount spent	Ads Manager, the "Amount spent" column				
Results per Meta	the "Results" column				
Cost per result per Meta	the "Cost per result" column				
Real results	your store, your phone, your lead sheet				
Real cost per result	amount spent divided by real results				
Delivery status	Learning, Learning limited, Active, Creative fatigue				
What you decide	nothing, new ad, budget up, or fix tracking				

The decision rule, at the 3-week read:

- Real cost under target: raise the budget in small steps.
- Real cost between target and break-even: change the ads first.
- Real cost over break-even at the 3-week read and still over the week after: pause, check tracking and the offer, then restart.

One more case, separate from the 3-week read. An ad that has spent twice your target cost with no result at all gets paused, or it keeps taking money from the ads that work. But only after the first 7 days. For the repair shop that's $78, twice $39, about two days of budget, so in the first 7 days you leave it alone. For the knife store it's $60, twice $30.

10 FOUR WORKED EXAMPLES, WITH THE MATH DONE

The businesses below are made up, and their numbers were picked to show the math. They're not market averages or anyone's results. Pick the one closest to yours and redo it with your own numbers on the worksheet in chapter 1.

Example 1: an online kitchen knife store

Say you run an online store selling kitchen knives, knife sets, and whetstones, on Shopify, with free shipping. Your pixel sends Meta the order total including sales tax, which averages 7% across your orders.

The store's numbers

- Average order: $95 before sales tax.
- What the store pays per order: the product $37, the shipping label $9, card processing $3 (2.9% plus 30 cents on $95 comes to $3.06, rounded to $3 here), the box and packing $1.
- Budget: $50 a day, $350 a week.

The math

1. Costs per order add up to $50, so $45 is left before ads. That's break-even per order.
2. Margin: 45 out of 95, or 47.4%.
3. Break-even ROAS: 100 divided by 47.4, so 2.11.
4. Because the pixel value includes the 7% tax, the same break-even reads as 2.26 in Ads Manager (2.11 times 1.07).

Target cost: you want to keep $15 an order, so you'll spend at most $30 in ads on one. Half of break-even would have been $22.50, but you accept a smaller profit to sell more. At $30 an order, the target ROAS is 3.17 before tax, or 3.39 as Ads Manager shows it.

How far the budget goes: for 50 orders a week you'd need $1,500 a week, about $214 a day. Your real $350 a week buys about 11.7 orders a week at $30.

What you pick in Ads Manager

- The "Sales" objective. Meta counts the paid order.
- One campaign and one ad set, broad audience across the US, with Advantage+ placements, so Meta decides where the ad shows.
- 4 ads: two phone-shot videos of the knives at work in a home kitchen, a 4:5 image with the price, and a carousel with three products. Meta allows kitchen knives, but not review-style ads for bladed items, so the videos show cooking, not a test or a review.

The ad set will sit in "Learning limited," because about 12 orders a week is under 50. You accept that and confirm the budget decision at 30 days.

First read, at 3 weeks

You spent $1,050. The numbers side by side:

	ADS MANAGER	YOUR STORE
Orders	34	31 kept
Sales	$3,456.10 (with sales tax)	$2,945 (before tax)
ROAS	3.29	2.80

The gap: 3 customers sent their knives back for a refund, and Ads Manager reports the order value with tax included. You go by the right-hand column.

What it means

Against your 2.11 break-even, you're making money, but not much. Profit is $282: 31 orders at $45, minus $1,050 in ads, minus $63 for the 3 returns ($21 each: the outbound label, the card fee you don't get back, and the return label).

Against your 3.17 target, you're short. A kept order cost you about $33.87, more than your $30 target but under your $45 break-even. Under the rule in chapter 9, in this spot you change the ads first.

The decision

- You don't raise the budget.
- You add two new ads, on angles you haven't tried.
- You look into the returns. Without them, you'd have kept $480; the 3 returns cost you $198 of profit.

Example 2: an independent auto repair shop in Dayton, Ohio, that books appointments

Say you run an independent repair shop in Dayton: maintenance, brakes, timing belts, diagnostics. All amounts below are before sales tax.

The shop's numbers

- An average repair brings in $650. After parts and the labor paid to the techs, $195 is left.
- Out of 10 people who leave their number, 4 come in.
- Budget: $40 a day.

The math

1. A repair leaves $195, so the margin is 30%.
2. Break-even per customer: $195, figured on the first visit only. A customer who comes back is worth more, but the safe math uses the first job.
3. Break-even per lead: $78. If 4 of 10 leads become customers, a lead is worth 4 tenths of $195.
4. Target cost, at half of break-even: $39 a lead, or $97.50 a customer.

How far the budget goes: 50 leads a week would take $1,950 a week, about $279 a day. At $40 a day, $280 a week, you get about 7 leads a week at target. The ad set will show "Learning limited," and that's fine.

What you pick in Ads Manager

- The "Leads" objective, with Meta's "Higher intent" form.
- Two questions on the form: "What do you need done?" and "When would you like to come in?"
- Location: Dayton plus 15 miles, with "Reach more people likely to respond to your ads" unchecked.

Meta only sees the form, so download leads every day, call people the same day, and log every lead on your lead sheet. Only that sheet tells you who came in.

First read, at 3 weeks

	ADS MANAGER	LEAD SHEET
Results	40 leads	13 people came in
Cost	$21 a lead	about $64.62 a customer

You spent $840.

What it means

A customer cost you about $64.62, under your $97.50 target and far under your $195 break-even. Profit on those jobs, after ads, is $1,695: 13 jobs at $195, minus $840 in ads.

One thing to note: 13 of 40 leads came in, closer to 3 in 10 than 4. That lowers break-even per lead to about $63.38 ($195 times 13, divided by 40). At $21 a lead you're still far under it.

The decision

- Cost is well under target, but the ad set is "Learning limited," so you confirm the budget decision at 30 days.
- If a customer still costs under $97.50 then, raise the budget by $5 to $10 a day every few days, not all at once.
- If fewer than 3 in 10 leads come in, redo the math.

Example 3: a 5-room bed and breakfast in Fredericksburg, Texas, with bookings by Messenger, call, or text

Say you run a bed and breakfast with 5 rooms in Fredericksburg. Guests book by calling, texting, or messaging your Facebook Page; there's no online payment. All amounts here are before hotel and sales taxes.

An average booking brings in $420, 2 nights at $210. Cleaning, breakfast, and card fees cost you $95 a booking. Out of 10 Messenger conversations, 2 end in a booking. Your budget is $35 a day.

The math. Each booking leaves you $325: you take in $420 and spend $95.

Break-even per conversation is $65. Only 2 of 10 conversations turn into a booking, and each booking leaves $325. To keep a profit, your target is half of break-even: $32.50 a conversation, which is $162.50 a booking.

Now the budget. Fifty conversations a week at target would take $1,625 a week, about $232 a day. At $35 a day you get about 7.5 conversations a week, so the ad set will sit in "Learning limited." You know that going in.

What you pick in Ads Manager. The Engagement objective, Messenger as the destination, and the performance goal that counts conversations, so Meta looks for the people most likely to message you. Take the greeting and the tap-to-send questions from chapter 8. In the ads, show the rooms and the town with no filters, and put your open dates in big type. Put your phone number in the ad text for people who'd rather call or text.

Count conversations in Ads Manager ("Messaging conversations started"), and count calls and texts by hand, because Meta can't see those. For each new conversation, note whether it ended in a booking.

First read, at 3 weeks.

WHAT YOU TRACK	NUMBER
Amount spent	$735
Conversations started	120
Cost per conversation	about $6
Bookings	16
Cost per booking	about $45.94

What it means. A booking costs you far less than you planned: about $45.94, against a $162.50 target.

One number came in weaker than you assumed: about 1.33 bookings per 10 conversations, not 2 (16 out of 120). That drops break-even per conversation to about $43.33, still far above the roughly $6 you're paying.

After ads, the bookings left you $4,465: 16 bookings at $325, minus the $735 you spent.

The decision. Cost is under target, but you only have 5 rooms, so you don't raise the budget. Keep it as long as you have rooms open. When a weekend fills up, change the dates in the ad. When nothing's left, pause the campaign: an ad for a weekend that's already full is money thrown away.

If you run a restaurant

The math is the same, with the average check per table in place of the booking. The right location is usually "Calls," an ad whose button calls you directly. Count calls on a sheet by the phone and ask everyone who calls: "How did you hear about us?"

Example 4: an office cleaning company on monthly contracts

Say you run a cleaning company in Denver with monthly contracts for offices of 20 to 100 employees. Here too, amounts are before tax.

The average contract is $1,800 a month. After wages and supplies you keep 30%, or $540 a month. A client usually stays at least a year. Out of 10 leads, 3 come from the right kind of company (qualified leads), and 1 in 3 qualified leads signs. A contract usually gets signed 3 to 6 weeks after the first inquiry. Your budget is $100 a day.

The math. One client comes out of every 10 leads, so 10% of leads become clients.

Over a year, a client leaves you $6,480: $540 a month for 12 months. On the worksheet: you bill them $21,600 a year, it costs you $15,120, and you keep $6,480.

Break-even per lead, figured on 12 months, is $648.

But you don't want to wait a year to get your money back. You want the ads to pay for themselves in the first 3 months of the contract, $1,620 per client. That gives you the target: $162 a lead, or $540 a qualified lead.

Now the budget. For 50 leads a week you'd need $8,100 a week. At $100 a day, $700 a week, you get about 4.3 leads a week at target.

Even if a lead cost a third of your target, about $54, your $3,000 a month would buy about 56 leads. That's far from the 200 a month at which connecting a CRM pays off, and "Maximize number of qualified leads" needs that connection. So for now you skip both the CRM connection and that goal.

If you also advertise jobs to hire cleaners, that's a separate campaign in the Employment special ad category (chapter 12). Meta counts even ads about the perks of working for you as employment ads.

What you pick in Ads Manager. The Leads objective, with a "Higher intent" form. Put three questions on the form:

COPY THIS

How many employees work at your office?
What city is the office in?
When would you like to start?

In the ads, name one specific client problem and say what's included in the contract. Judge monthly on cost per qualified lead, from your lead sheet.

The 30-day read.

WHAT YOU TRACK	NUMBER
Amount spent	$3,000 ($100 a day, 30 days)
Leads	46
Cost per lead	about $65.22
Qualified leads	13
Cost per qualified lead	about $230.77
Contracts signed	1
Proposals out	4

What it means, and the decision. A qualified lead costs you less than half of what you planned: about $230.77, against a $540 target.

One contract in the first month doesn't tell you much, because signing takes 3 to 6 weeks. The 4 proposals out haven't been decided yet. So keep the budget another month and judge at 60 days, on contracts signed, not on leads.

11 THE MISTAKES THAT BURN MONEY

Your online toy store, this month: you open Ads Manager and see 60 orders this month. You open your store and count 30. Where are the other 30?

Often, nowhere: the same order got counted twice, once by the pixel and once by the Conversions API. When the numbers don't match, check that first.

Each mistake below leaves a sign you can see in the account. Look for the sign, then make the fix.

THE MISTAKE	WHAT YOU SEE	WHY IT HAPPENS	HOW TO FIX IT
Using "Boost" on a post instead of Ads Manager	Lots of likes and visits, few sales	Boost picks settings for you based on the goal you check	Build the campaign in Ads Manager (chapter 8)
Running a Traffic campaign when you want sales	Cheap clicks, almost no orders	Meta looks for people who click, not people who buy	Switch to Sales or Leads
Launching without checked tracking	Meta shows a different number than your store	Meta worked from bad data	Redo the test from chapter 3 and relaunch
Orders counted twice	Twice as many orders as in your store	The pixel and the server don't send the same ID for the same order	The line on the developer page, then a check in "Test events"
Budget split across too many ad sets	Every ad set is "Learning limited"	None of them reaches 50 results a week	Combine them into one ad set
Changes every day	Costs jump day to day, the ad set stays in learning	Every significant edit restarts learning	7 days with no changes after launch (the timing rule in chapter 5)
Testing by turning ad sets on and off	Conclusions that flip from month to month	Meta says the results are unreliable	Use "A/B Test" in Ads Manager
Cloned ads	Ads with the same image or the same opening	Very likely Meta treats them as one	Ads on different angles (chapter 7)

THE MISTAKE	WHAT YOU SEE	WHY IT HAPPENS	HOW TO FIX IT
Retargeting with Advantage+ audience	Ads reaching people who never visited your site	Meta doesn't recommend it for retargeting	A custom audience of site visitors
ROAS judged without your margin	ROAS 3, but the bank balance is shrinking	Break-even ROAS depends on your margin	Fill in the worksheet (chapter 1)
Sales tax inside the pixel value	ROAS looks a bit better than your money	Sales tax isn't revenue, but the value Meta gets may include it	Divide ROAS by 1 plus your tax rate, or send the value before tax (chapter 1)
Horizontal video or text low in Reels	The button or account name covers your text	The safe zone is ignored	A 9:16 video, with 14% clear at the top, 35% at the bottom, 6% on the sides
Lost form leads	More leads in Ads Manager than you called	They expired after 90 days, or the caller has no access	Download daily or connect a CRM; give the caller access
Leads called the next day	People don't answer or don't remember you	Ads run at night and on weekends	Call the overnight leads first thing in the morning
No second admin	A hacked account leaves you with no ads	Meta recommends two people with full control and two-factor authentication	Set up both on day one
A special category skipped	The ad is rejected, or the campaign is disapproved	Housing, jobs, financial services, and political or social issue ads need the category	Select the category at the campaign level (chapter 12)

What to do this month:

- [ ] Put Ads Manager's orders next to your store's orders, for the same month.
- [ ] If Ads Manager shows twice as many, fix the double counting before anything else.
- [ ] Go through the table line by line and check off the mistakes you find.
- [ ] Add a second admin and turn on two-factor authentication, today.

12 THE US RULES YOU NEED TO KNOW

In short: housing, jobs, and financial products and services need a special ad category and come with fewer targeting options. Social issues, elections, and politics need authorization and a "Paid for by" disclaimer. Sensitive data stays out of your ads, forms, and pixel, and health and wellness businesses should expect Meta to restrict what their pixel sends. And you honor opt-outs under state privacy laws.

Take a roofing company that advertises roof repairs. Meta's housing category covers more than listings: it names homeowners insurance, mortgages, housing repairs, and appraisal services. Forget to select the category, and the ad can be rejected.

Housing, employment, and financial products and services

When you create the campaign, select "Special Ad Categories" and choose the category. Meta requires it for these ads when the advertiser is in the US or the ads reach people in the US. Financial products and services became required on January 21, 2025, and replaced the old Credit category.

For these ads in the US, Meta limits or removes these options: age, gender, ZIP code, exclusion targeting, lookalike audiences, and saved audiences. Some interests disappear too, and audiences built on a city or a dropped pin get an expanded radius. Advantage+ audience isn't available for these campaigns at all.

For a real estate agent, a mortgage broker, a recruiter, or an insurance agency, that changes the plan: broad audience, strong creative, and a radius wider than you'd like.

Employment is broader than job postings. Meta includes ads for job boards and job fairs, and ads about the perks of working for a company even without a specific opening.

Ads about social issues, elections, or politics

In the US you can run them, but only after Meta authorizes you. That means confirming your identity with a US ID and a US residential mailing address, turning on two-factor authentication, and setting up a "Paid for by" disclaimer that shows on every ad. The ads then go into the public Ad Library for seven years. You select the category at the start of the campaign. Skip it, and if Meta decides your campaign is about a social issue, election, or politics, the campaign gets disapproved.

The trap for an ordinary business is the "social issues" part: topics that are heavily debated and can sway an election or relate to legislation. In the US, Meta's list runs from civil and social rights and the economy to guns, health, and immigration. An ad that sells a consultation or a product isn't one. The problem starts when the ad takes a side in a public debate. Sell what you sell, and leave the debates out.

Health, wellness, and sensitive data

Meta's ad policy doesn't allow ads that assert or imply knowledge of the viewer's personal attributes, including medical conditions, vulnerable financial status, religion, or sexual orientation. Talk about your service, not the viewer (chapter 7).

On the data side, Meta's Business Tools terms prohibit sending health and financial information. If Meta puts your website in the health and wellness category, it can limit your pixel to "Core setup," block mid and lower funnel events like purchases, or block events completely. You'll see it in Events Manager. If that happens, Meta suggests optimizing for events higher up the funnel, or for objectives that don't depend on pixel data, such as Awareness, Engagement, or Traffic.

Washington's My Health My Data Act goes further than HIPAA: it covers health data held by any business, small ones included. You need opt-in consent to collect consumer health data and a separate, distinct consent to share it, and a pixel sending that data to Meta counts as sharing. If your site sells health or wellness products or services to people in Washington, put an opt-in step in front of the pixel on those pages, with a separate yes for sharing with Meta. One general cookie banner isn't enough.

If you're a HIPAA covered entity, keep tracking off pages behind a patient login and off public pages where visitors type in health information, like a booking or symptom form. In June 2024 a federal court struck down one piece of HHS's tracking guidance: the idea that an IP address plus a visit to a public page about a condition or a doctor is protected health information. HHS didn't appeal. The rest of the guidance still stands.

State privacy laws

If the state laws apply to you (chapter 3 has the California thresholds), add an opt-out link, honor the Global Privacy Control signal, and send opted-out visitors to Meta with Limited Data Use.

- [ ] Check whether your ads touch housing, employment, financial products and services, or social issues, elections, or politics, and select the category if they do.
- [ ] Reread the first seconds of each ad: is it clear who it's for, without implying you know something personal about the viewer?
- [ ] Remove any form question about health or finances.
- [ ] Check your data source category in Events Manager.
- [ ] If state privacy laws apply to you, add the opt-out link, honor Global Privacy Control, and turn on Limited Data Use for people who opt out.

13 FREQUENTLY ASKED QUESTIONS

Short answers, each pointing to the chapter with the details.

Can I start with $20 to $30 a day?

Yes, with one ad set. Meta's technical minimum varies by country, objective, and settings, and Ads Manager warns you if you're under it. The budget that matters is the one that gets an ad set to about 50 results a week (chapters 1 and 5). Below it, you still find out whether the ads make money, just more slowly, and you confirm the budget decision at 30 days.

At $30 a day and the target costs in the examples, the knife store would get about 7 orders a week at $30 each, and the repair shop about 5 leads a week at $39 each. Don't split the money across campaigns. It all goes in one ad set.

Should I use "Boost" on my Page or Ads Manager?

Ads Manager, whenever you want sales or leads. "Boost" picks the settings for you based on a goal you check, and it doesn't give you control over what Meta counts, URL parameters, or tests.

Meta's form or the form on my website?

Meta's form usually brings more leads, because people don't leave the app. Your website form brings people who've already seen your prices and your page. If you call every lead the same day, start with Meta's "Higher intent" form. If nobody can make the calls, use your website. If you're not sure, choose "Website and instant forms," which collects both.

How many ads and ad sets should I start with?

One campaign, one ad set, and 3 to 6 ads on different angles. Meta says that with lots of ad sets and ads, the system learns less about each one.

How long before I judge a campaign?

Watch for the first 7 days, decide at 3 weeks. The rest of the rule, with "Learning limited" and business-to-business, is in chapter 5.

Why does Meta show more sales than my store?

Check these causes in this order:

1. The same order is counted twice, because the pixel and the server don't send the same ID for it. Give your developer that line from the developer page.
2. Returned and refunded orders stay in Meta. For Meta the order happened; for you, the money went back.
3. Meta credits the ad with sales from people who only saw it, maybe the day before, without clicking.
4. The value includes sales tax. That doesn't change the count, but it makes ROAS look better than it is (chapter 1).

My ad account got restricted. What do I do?

Follow the steps in chapter 2, from "Business Support Home." Only an admin can request a review, and don't open a new account to get around it.

Do I have to pay someone to film my ads?

Not at first. Meta recommends vertical video with sound and captions, and you or your staff on a phone often beat an expensive production. Pay for production once you know which angle sells.

I run a clinic, a lender, or a real estate business. Can I advertise?

Yes, with extra rules. Clinic ads can't imply you know anything about the viewer's health, the form can't ask for medical information, and Meta may restrict what your pixel sends. Real estate, lending, and job ads fall under special ad categories with limited targeting. Details in chapter 12.

My pixel sends the order total with sales tax. What do I change?

Two options, both in chapter 1:

- [ ] Ask your developer to send the order value before sales tax, if your platform allows it.
- [ ] Or keep it and divide every ROAS you read in Ads Manager by 1 plus your average tax rate. At 7%, 3.0 becomes 2.8.
- [ ] Either way, keep your worksheet on prices before tax and compare like with like.

How long does Meta keep my form leads?

Ninety days from submission. Get them into your CRM or spreadsheet before then.

14 THE 30-DAY PLAN

Day 0: the math

- [ ] Fill in the worksheet from chapter 1.
- [ ] Pick the example from chapter 10 closest to your business and redo it with your numbers.

Done when: you know your break-even and target cost per sale or per lead, and whether your pixel value includes sales tax.

Days 1 to 3: the account

- [ ] Create your business portfolio.
- [ ] Create the ad account in US dollars and your time zone.
- [ ] Add two admins, both with two-factor authentication or a passkey.
- [ ] Add a payment method.

Done when: from your business portfolio you can get into Ads Manager, Events Manager, and billing.

Days 4 to 6: tracking

- [ ] Pick what Meta counts, from the table in chapter 3, and write it on the developer page.
- [ ] Turn on the pixel and Conversions API through your platform's integration or the free "Meta-enabled" option. If neither works, send the developer page to a developer.
- [ ] If state privacy laws apply to you, add the opt-out link and Limited Data Use.

Done when: a test order or form shows up once in "Test events," and for a store, with its value. If you only take leads by phone or Messenger, the tap on the call or message button shows up.

Days 7 and 8: the ads

- [ ] Look up 3 to 5 competitors in the Ad Library.
- [ ] Make 3 to 6 ads, each on a different angle, with the brief from chapter 7.
- [ ] Include at least 2 vertical phone videos and one 4:5 image.
- [ ] If you're using Meta's form, build it now.

Done when: every ad has a different opening and a different reason to buy.

Day 9: launch

- [ ] Build a single campaign, following chapter 8.
- [ ] Choose the right objective (chapter 4) and make one ad set.
- [ ] Keep the audience broad and set location, minimum age, and language. Placements stay on Advantage+.
- [ ] Set the budget from chapter 5.
- [ ] Add URL parameters to every ad.
- [ ] Check what Meta changes in your ads on its own.

Done when: the campaign is active and the ad set shows "Learning."

Days 9 to 16: the 7 days you just watch

Follow the timing rule from chapter 5 and change nothing.

- [ ] Check daily that counting is right, against your store or your phone.
- [ ] For forms, download leads every day and call them.

Done when: 7 days have passed with no significant edits.

Days 16 to 18: a first look at the numbers

- [ ] Fill in the first column of the Monday sheet (chapter 9).
- [ ] Pause only ads with no results that have spent twice your target cost.

Done when: you know your first real cost per result.

Days 19 to 27: retargeting, only if you have budget beyond what you figured

If you don't have extra budget, skip this stage.

- [ ] Start a small retargeting campaign for site visitors from the last 30 days, excluding buyers, with a custom audience you build (chapter 6).
- [ ] The money for it comes on top of your budget, not out of the main campaign.

Done when: retargeting runs as a separate campaign and you haven't touched the main one.

Save the A/B test, broad audience against interests, for month two, and run it with Meta's "A/B Test" tool.

Days 28 to 30: the first real read, after 3 weeks of running

Now you put your numbers next to Ads Manager's.

- [ ] Fill in the Monday sheet for the 3 weeks.
- [ ] Figure your real ROAS (before tax) and set it next to your break-even ROAS.
- [ ] For services, figure cost per customer won. For bookings, cost per booking. For business-to-business, cost per qualified lead.
- [ ] Decide using the rule in chapter 9:
  - Under target cost: raise the budget in small steps. If the ad set is "Learning limited," raise it only after 30 days of running, around day 39.
  - Between target and break-even: change the ads first, then the offer.
  - Over break-even at the 3-week read and still over the week after: pause the campaign, check tracking and the offer, then restart.
- [ ] If you decided on new ads, add them now. The ad set goes back into learning for a few days, and that's expected.

Done when: you have a written decision for month two: raise, keep, or change.

The rule for the whole stretch

If after 30 days you don't have clean data, the ads aren't to blame. Fix tracking first.

15 THE CHECKLIST

Print this checklist and go through it before every new campaign.

The account

- [ ] The business portfolio is in your company's name, with a company email.
- [ ] Your Page, Instagram, ad account, and pixel are in your portfolio, not someone else's.
- [ ] The ad account is in US dollars and your time zone.
- [ ] Two people have full control, and everyone with access uses two-factor authentication or a passkey.
- [ ] You know whether your Meta receipts include a sales tax line, and you count it as ad cost.

The math

- [ ] The worksheet is filled in, and you know your break-even and target cost.
- [ ] For a store, you know your break-even ROAS, and whether your pixel value includes sales tax.

Tracking

- [ ] The Conversions API is on, alongside the pixel.
- [ ] Meta counts the right event for your type of business.
- [ ] For a store, the order arrives with its value and currency.
- [ ] Orders aren't counted twice.
- [ ] You tested in "Test events," and Meta's orders match your store's.
- [ ] Nothing about health, finances, or other sensitive topics is sent, in data or in page URLs.
- [ ] If state privacy laws apply to you, opt-outs and Global Privacy Control reach Meta as Limited Data Use.
- [ ] Every ad has URL parameters.

The campaign

- [ ] If you want sales, the objective is Sales or Leads, not Traffic.
- [ ] The conversion location follows chapter 4.
- [ ] You have one ad set, with the budget from chapter 5. If your budget is under that, you confirm the budget decision at 30 days.
- [ ] Location, minimum age, and language are set, and the rest is broad.
- [ ] For a local business, "Reach more people likely to respond to your ads" is unchecked.
- [ ] Advantage+ placements are on.
- [ ] For housing, employment, or financial products and services, the special ad category is selected.
- [ ] The ad doesn't take a side on a social or political issue, unless you're authorized for it.

Meta's form, if you use it

- [ ] You chose "Higher intent," if you call every lead.
- [ ] The form has 2 or 3 qualifying questions and no prohibited ones.
- [ ] The privacy policy link goes to a web page, not a PDF.
- [ ] If you'll follow up by text, the form asks for consent to texts.
- [ ] The person who calls has permission to download leads.
- [ ] Leads are downloaded daily or flow into a CRM.

The ads

- [ ] You have 3 to 6 ads, each on a different angle, each with a brief.
- [ ] Reels are 9:16 and respect the safe zone.
- [ ] Feed images are 4:5.
- [ ] Videos have captions.
- [ ] Reels don't use licensed music.
- [ ] You checked in the preview what Meta changes on its own.

After launch

- [ ] The first 7 days pass with no significant edits.
- [ ] You fill in the Monday sheet every week.
- [ ] The budget goes up in small steps.
- [ ] You judge ROAS against your break-even ROAS, on the same basis (before tax).
- [ ] You add new ads only after the first 7 days, in three cases:
  - "Creative limited" shows up: the cost per result went up but is under twice what your past ads cost;
  - "Creative fatigue" shows up: the cost has reached twice that or more, because people have seen the ad too many times;
  - at the 3-week read, your real cost is above target.
- [ ] Once a month, you compare Meta's results with your real sales, calls, or contracts.

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