



‘Simple’ Audit Checklist for:

NOTE: This is a ‘simple’ audit checklist which will apply to all business types. There are many more settings available to businesses depending on what type of business you are eg: eCommerce etc...

The checklist will cover the top 3 mainstream platforms:

1. Facebook:
 - a. Business Manager
 - b. Pages
 - c. Business suite
 - d. Creator Studio
2. Google My Business
3. Instagram

FACEBOOK BUSINESS MANAGER

Go to www.business.facebook.com/settings

Topic	Notes	Completed	Date Completed
Users: People	Ensure the correct people re in your BM account here. Note: Do not add people in your actual business page, they should only be added herein BM from now on.	Y N	
	Ensure all people in your BM account have 2-factor authentication turned on for security purposes (very important).	Y N	
	Ensure only necessary people have ‘business admin’ level access as they can do everything including; <ul style="list-style-type: none"> - Add/remove people from BM - Can create new pages - Can create ad accounts 	Y N	



	<ul style="list-style-type: none"> - Can delete pages and BM - Can add people to ad account to spend \$ - Can update payment settings - Can access pixels and data <p>Everyone else should only have 'employee' level access.</p>		
Users: Partners	<p>This is where you share your assets with agencies who work on your accounts. Whatever access you allow an agency to have, they can then allocate this access to people in THEIR BM (their employees working on your account).</p>	Y N	
Accounts: Pages	<p>Ensure correct pages have been added to your account and that only the relevant people have management rights to each page.</p> <p>If you are an agency managing Facebook and Instagram accounts on behalf of a client, you should only have 'access' to their BM NOT own their pages in your BM account.</p>	Y N	
Accounts: Ad accounts	<p>Ensure you have a business ad account for the use of advertising your business pages. One per page where possible as this makes it easier for billing and separation down the track.</p> <p>Every individual is allocated a 'personal' ad account when they join Facebook. Don't use this ad account for ad spend for your business. If you wish to sell the business down the track, you are not able to hand over the personal ad account with all ads and</p>	Y N	



	analytical data to the new business owner.		
Accounts: Instagram accounts	<p>Check all Instagram accounts are completely connected:</p> <ul style="list-style-type: none"> - Via Facebook page under settings - Imported via BM - Most accounts will also need to be connected again via BM (you will see an orange notification if this is required. Just signing in again to connect). 	Y N	
Data sources: Pixels	<p>Recommended that you create a 'pixel' for your BM account and install it on your website.</p> <p>Ensure that the little circle to the right of the pixel name in BM is 'green' and not 'red'. If it is 'green' it is installed and tracking correctly.</p> <p>Facebook has partner platforms such as Shopify and Wordpress etc.. This is very simple to install the pixel on your website however if you have a 'custom' site or a site that isn't a partner with Facebook, you may need your web developer to install the code for you.</p>	Y N	
Brand Safety: Domains	<p>Your website domain should be 'verified' via BM. This is a very simple process with 3 x process options to verify.</p> <p>It is recommended that you verify via the 3rd option, to update via the DNS record. If you're unsure of how to do this, speak with your domain host. If your website has been verified correctly, it will say 'verified' in green to the right of</p>	Y N	



	your domain name in this section of BM.		
Payment methods	You can add a payment method to your actual BM account. This means that any admins in BM can create an ad account and connect this payment method to it. Alternatively, you can leave this blank and only apply payment methods to individual ad accounts as required.	Y N	
Security Centre	Two-factor authentication should be turned on for everyone.	Y N	
Business Info	Ensure this is complete and that the 'tax ID' field is filled in with your ABN.	Y N	

FACEBOOK PAGES

Go to your business page via 'Business Manager'

Topic	Notes	Completed	Date
Home page:	Profile pic current and consistent with all other social platforms.	Y N	
	Cover image current and consistent with all other social platforms. Consider video here.	Y N	
	Call to Action (CTA) Button. Is it directing to the right place? Have you tested it?	Y N	
	@handle. This should be as close to your actual business name as possible with no acronyms.	Y N	
Settings (look out for)	General: Others 'tagging' this page should be turned to 'on'.	Y N	



	Profanity filter should only be 'medium' at the highest OR comments with slang eg: 'Yeah Boi' can be blocked.	Y N	
Messaging	Turn on auto reply. Customise the reply with persons 'first name', your 'phone' and 'email'. This info is inserted via the 'about' section so ensure info in here is always correct.	Y N	
	Auto reply FAQs. You can direct people to website URLs and documents/marketing materials.	Y N	
Page Info	The info in here can be auto filled into your messaging auto replies. Ensure info is consistent with all other digital such as website, Instagram, Google My Business.	Y N	
Templates and Tabs	You can turn some of these off and reorder them to keep your page tidy and organised. You can also do 'customised' tabs (page must be eligible).	Y N	
Page roles	All 'people' should be added via Business Manager only.	Y N	
Instagram	Ensure Instagram has been connected via here. Instagram must be a business profile for this.	Y N	



BUSINESS SUITE

Go to [your business suite](http://www.business.facebook.com) via: www.business.facebook.com

You can manage comments, post content, schedule content, cross post to Instagram etc... here.

CREATOR STUDIO

Go to [your business suite](http://www.facebook.com/creatorstudio) via: www.facebook.com/creatorstudio

Very similar features to Business Suite however also has additional features for video and gamers

GOOGLE MY BUSINESS

Go to your google account, the nine little circles in the top right-hand corner, click on the blue house. All of your Google My Business listings will show here.

Topic	Notes	Completed	Date
	Listing verified?	Y N	
	Profile and cover image correct? Consistent with all other socials?	Y N	
	Info current? Consistent with website and all other social platforms. Very important	Y N	
	Users correct? Level of access correct?	Y N	
	Reviews responded to, even the negative.	Y N	
	1 x post per week	Y N	



INSTAGRAM

To connect your Instagram account to your Facebook account, it must be a business profile.

Topic	Notes	Completed	Date
	Business profile?	Y N	
	Profile image correct? Consistent with all other socials?	Y N	
	If someone has your password, they can delete your profile very easily, be careful with this.	Y N	
	Bio up to date	Y N	
	Hashtag / check-in promoted	Y N	
	Contact info correct?	Y N	
	Category correct?	Y N	
	Connected to Facebook via: <ul style="list-style-type: none"> - Business Manager - Business Page 	Y N	
	How does your feed look? Have you got a theme/design/style?	Y N	