

Meta Campaign Setup Checklist

90-Day Seller Appointment Implementation Kit

Version 1.1 | Last Updated October 2, 2026

Purpose: Connect the completed funnel to a Housing-compatible Meta lead campaign.

Requires: Seller Offer Selection Worksheet: offer chosen; finished seller resource hosted; Seller Ad Copy and Headline Templates and Seller Creative Guide: assets ready; Steps 4–5: funnel, qualification, follow-up and calendar tested; Seller Campaign Compliance Checklist: reviewed; Software Functions and System Setup and CRM Automation and Connection SOP: tracking and routing working

When to use: After funnel tests and before Campaign Launch Checklist launch

Estimated time: 60–120 minutes

[Open the Resource Hub](#)

Verification record

LAST VERIFIED: October 2026. Confirm current controls and requirements in your signed-in Meta account before launch.

SOURCE: <https://www.facebook.com/business/help/298000447747885>

SOURCE: <https://www.facebook.com/business/help/2220749868045706>

SOURCE: <https://www.facebook.com/business/help/1198401317374558>

SOURCE: <https://www.facebook.com/business/help/2035196646663270>

Before launch, open these official pages from your signed-in account and record [DATE], [REVIEWER], [HOUSING CONTROLS SHOWN], and [ANY ACCOUNT-SPECIFIC CHANGES]. Use the available compliant controls. Only use controls available for your declared category and account.

1 Confirm ownership and access

- ☐ The agent or brokerage controls the correct business assets, Page, ad account, and payment method.
- ☐ The person building has delegated permission; credentials are not shared in documents.
- ☐ The actual agent and brokerage identity, destination domain, privacy notice, and licensed service area match.
- ☐ Billing currency and account timezone are understood; normalize reporting dates to one declared agent-local timezone.

2 Create the campaign draft

- ☐ Create a campaign designed for lead generation. Recommended starting objective: Leads, using the current website conversion option if available for your account.
- ☐ Declare Housing or the current applicable housing category. Seller-service ads are not made exempt merely by calling the offer educational.
- ☐ Name it LC_[CITY]_[SELLER OFFER]_Website_[DATE]. Keep the campaign off until Campaign Launch Checklist passes.
- ☐ Choose one budget-owning level. Recommended starting structure: one campaign, one ad set, two ads, one offer, one service region. This is a simplicity recommendation, not a Meta requirement.
- ☐ Set daily or total-period controls from Seller Campaign Economics Calculator and a written monitoring/spend cap. Do not assume a daily budget is a hard never-exceeded cap.

3 Set the ad set by function

- [] Conversion location: the working website form. If the interface defaults to a combined website/instant-form route, choose a website-only option when available; otherwise intentionally configure and test each enabled route separately.
- [] Performance goal: optimize for the successful lead submission event when supported and verified, not merely link clicks. Select the correct dataset and tested event.
- [] Geography: use the Housing-permitted locations covering the documented service area. Inspect any automatically broadened radius and confirm the agent can handle inquiries throughout it. Never promise exact ZIP-only delivery.
- [] Do not narrow by protected traits or use prohibited proxies. Do not assume age, gender, ZIP codes, interests, saved audiences, lookalikes, location exclusions, or audience exclusions are available. Record the actual category-approved controls rather than copying an old tutorial.
- [] Placements: use permitted placements and inspect the previews. A broad starting placement configuration is an operating option, not a performance guarantee.
- [] Audience expansion or automation: inspect its available constraints. Do not treat a suggestion as a guaranteed geographic boundary.

4 Create the ads

- [] Use the correct Page and permitted Instagram identity.
- [] Add two approved copy/creative combinations from Seller Ad Copy and Headline Templates and Seller Creative Guide, both for the same offer.
- [] Add the live destination URL and campaign/ad IDs through UTM parameters. Example:
`utm_source=meta&utm_medium=paid_social&utm_campaign=[CAMPAIGN_ID]&utm_content=[AD_ID]`.
Do not put homeowner details in URLs.
- [] Match CTA, delivery promise, and content across ad, page, resource, and email.
- [] Review every enabled placement crop and required disclosures.

5 Verify tracking before spending

- [] Software Functions and System Setup defines one successful submit as Lead, not a button click or ordinary page view.
- [] A valid test creates one CRM opportunity with source and timestamp and one logical lead event.
- [] Invalid form, repeated click, and refresh do not create extra unique leads.
- [] If browser and server both send the same logical event, use the integration's documented deduplication and verify its behavior in the event testing view.
- [] Booking is recorded as booked; held is marked after attendance by a human. Do not send a booking and label it a held appointment.
- [] Privacy choices and consent controls are honored. Pixel or server-side tracking does not replace legal permission.

Instant-form alternative

Use this only as a deliberate alternative if the website route is unavailable or is the variable you are testing. Create the same clear offer and disclosure in the native form, connect submissions to the CRM, deliver Seller Resource Templates, and use the same qualification and follow-up logic. Test duplicates, permissions, and every exit. Keep its source cohort separate from website leads. Do not assume native forms are always cheaper or better.

Optional retargeting

Skip it at launch unless permission, eligible audiences, audience size, budget, and current Housing rules support it. If used, advertise useful seller content to a permitted audience without protected-characteristic segmentation. Verify current custom-audience inclusion and exclusion permissions rather than assuming them. A working email and booking process is sufficient for the core kit.

Publish only through Campaign Launch Checklist

Record campaign ID, ad set ID, ad IDs, budget, destination, event, Housing review date, and launch date in the campaign setup record. After approval, inspect the first production inquiry end to end. Stop delivery for a broken destination, routing failure, missing required consent, duplicated tracking, or policy issue.

You are done when

Your draft targets the intended lead outcome, current Housing controls are documented, test events reconcile, and Campaign Launch Checklist passes before activation.