

Create a business portfolio

- [About business portfolios](#)
- [Business portfolio assets and their task-based permissions](#)
- [Create a business portfolio in Meta Business Suite](#)
- [Create a business asset group in Meta Business Suite](#)
- [About connected business assets](#)
- [Troubleshoot why you can't add or connect business assets to your business portfolio in Meta Business Suite](#)

About business portfolios

About business portfolios



Some features may not be available to you yet.

A business portfolio allows organizations to bring their Facebook Pages, Instagram accounts, Threads accounts, ad accounts, catalogs and other business assets together so you can manage them, and the [people who access them](#), from one place using business tools such as Meta Business Suite.

Business portfolios help you:

- View and manage all your business assets, such as commerce accounts, datasets and apps, in one place. Learn more about [how to set up and manage your business portfolio and business assets](#).
- Manage many people's access and permissions to your portfolio and business assets so they only have access to what they need to do their job. Learn more about [business portfolio access](#) and [business assets permissions](#).
- Run ads for your business across Facebook, Instagram and Threads.
- Create and manage [Shops](#) on Facebook and Instagram.
- Collaborate with business [partners, agencies and consultants](#).
- Add [system users](#) and access [Meta Business Tools](#) and other APIs.
- Analyze insights across your Pages, Instagram accounts and Threads accounts.
- Identify security risks and how you can address them. [Learn more about Security Center](#).
- View and manage requests and notifications about your business, accounts and assets.

Additionally, you need a business portfolio to do the following:

- Use Meta Business Suite.
- Enroll in [monthly invoicing](#).
- Run [ads about social issues, elections or politics](#).
- [Verify your domain](#).
- Create a [publisher block list](#).

To create a business portfolio, [follow the instructions in this article.](#)

Learn more

- [Create a business portfolio](#)
- [How Meta Business Suite works](#)
- [About users in your business portfolio](#)

Common support topics

[About advertising restrictions](#)

Business Help Center

[Troubleshoot a disabled or restricted account](#)

Business Help Center

[About Meta Business Support Home](#)

Business Help Center

[Fix a failed payment issue on Meta](#)

Business Help Center

Business portfolio assets and their task-based permissions

Business portfolio assets and their task-based permissions



Some features may not be available to you yet.

When someone is added to a business portfolio, they must be assigned the Facebook Page, ad account, catalog or business assets that you want them to manage before they can access them. You can give them partial access or full control of an asset. If you assign partial access, you must choose the specific permissions to give them based on the tasks you want them to work on.

Learn more about how to [add people to a business portfolio and assign a business asset](#). You can [change someone's permissions for a business asset](#) at any time.

Permissions available for each business asset

Select a business asset to see the permissions available. This will help you assign only the permissions someone needs to do their work.

Page

	Partial access	Full control	Full control with partner access
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	Content	Community activity	Messages and calls	Ads	Insights	Revenue	Everything	Everything except sensitive actions
Create, manage or delete posts, stories and more as the Page	✓						✓	✓
Protect your copyrighted content	✓						✓	✓
Review and respond to comments		✓					✓	✓
Remove unwanted content		✓					✓	✓
Report activity on the Page		✓					✓	✓
Send and respond to messages and calls as the Page			✓				✓	✓
Create, manage and delete ads for the Page				✓			✓	✓
See how the Page, content and ads perform.					✓		✓	✓

Switch into the Page to manage everything directly on Facebook, and by using tools like Meta Business Suite							✓	✓
Give access to others, remove anyone from the Page, including yourself							✓	✓
Perform sensitive tasks							✓	

[Learn more about Page access.](#)

[Learn more about how to give someone access to a Page.](#)

[Learn more about Page access for partners.](#)

Ad account

	Partial access			Full control
	Manage campaigns	View performance	Manage Creative Hub mockups	Manage ad accounts
View ads	✓	✓		✓
Create and edit ads	✓			✓
Access reports	✓	✓		✓
View, create and edit mockups in Creative Hub			✓	✓
Control ad account settings, finances and permissions				✓

Instagram account

Note: These permissions also apply to associated Threads accounts with matching usernames in the same business portfolio.

	Partial access					Full control
	Content	Messages	Community activity	Ads	Insights	Everything
Create, manage or delete posts, stories and more as the Instagram account	✓					✓
View posts from other Instagram accounts that this account follows	✓					✓
Send and respond to direct messages as the Instagram account		✓				✓
Review and respond to comments			✓			✓
Remove unwanted content and report activity			✓			✓
Create, manage and delete ads for the Instagram account				✓		✓
See how the Instagram account, content and ads perform					✓	✓

	Partial access					Full control
Give access to others and remove it, except for the person who created the Instagram account						✓
Manage everything, including the payment method to run ads						✓

Note: Full control of an Instagram account will not be available to assign to a partner business or when it's in a business asset group.

Threads account

You can only manage your Threads account's permissions from the associated Instagram account in your business portfolio. Review the full list of permissions in the Instagram account section in this article.

App

	Partial access			Full control
	Develop app	View insights	Test app	Manage app
Change app settings	✓			✓
View app analytics	✓	✓		✓
Test the app	✓		✓	✓
Change app settings	✓			✓
Manage roles				✓

Dataset

	Partial access	Full control
	Use events dataset	Manage events dataset
View data	✓	✓
View analytics	✓	✓

	Partial access	Full control
Create conversion ads with this dataset	✓	✓
Control all settings, add or remove events, edit user access and create audiences		✓

Commerce account

	Partial access	Full control
	Shops on Facebook and Instagram	Manage commerce account
View shop insights and manage shops and promotions	✓	✓
Control commerce account settings and sales channels		✓

[Learn more about how to assign commerce account permissions.](#)

Catalog

	Partial access	Full control
	Create ads	Manage catalog
View products and data sources	✓	✓
Create, edit and delete product sets	✓	✓
Select the catalog and product sets when creating an ad	✓	✓
View events and catalog match rate	✓	✓
Add, edit and delete products and data sources		✓
Connect the catalog to a Meta Pixel, app SDK or another type of business asset Note: You also need full control of the pixel, SDK or other asset		✓
Manage catalog settings or delete the catalog		✓

Learn more about how to [assign catalog permissions](#).

WhatsApp account

	Partial access					Full control
	Message templates (view only)	Message templates (view and manage)	Phone numbers (view only)	(Phone numbers (view and manage)	Manage phone numbers and message templates	Manage WhatsApp business accounts
View and use message templates	✓	✓			✓	✓
Create, edit and delete message templates		✓			✓	✓
View phone numbers and profiles			✓		✓	✓
Add and delete phone numbers				✓	✓	✓
Manage phone number names, profiles, registrations and settings				✓	✓	✓
Assign users						✓
View payment information						✓

Custom conversion

	Partial access	Full control
	Optimization and ads reporting	Optimization, ads reporting and Events Manager
Can use this custom conversion's data in their ad campaigns	✓	✓
View conversions attributed to ads in Ads Manager	✓	✓
Allow partner to view all custom conversion fires, including those not attributed to ads, in Events Manager		✓

Offline event set

	Partial access			Full control
	Upload Offline Conversions	Assign Ad Accounts	View Offline Event Set	Manage Offline Event Set
Upload data to this offline event set	✓			✓
Assign ad accounts to the offline event set and use it for advertising		✓		✓
View data and analytics for this offline event set.			✓	✓
Control settings for the offline event set and use it for advertising				✓

Business asset group

	Partial access	Full control
	View reporting data	Manage reporting data
View insights, performance and reports for assets in the group	✓	✓
Create, edit and view dashboards and reports in Facebook Analytics for assets in the group		✓

Publisher block list

	Partial access	Full control
	Apply publisher block list	Manage publisher block list
View the publisher block list, and apply it to one or more ad accounts in a business depending on the user's role in that business	✓	✓
View and update the publisher block list		✓

Property

	Partial access	Full control
	Integrate property	Manage property
View non-revenue metrics	✓	✓
Add platforms	✓	✓
Create Ad Spaces and placements	✓	✓
View all metrics		✓
Perform any action		✓

Learn more

- [About connected business assets](#)
- [Set up and manage your business portfolio and business assets](#)
- [About business portfolio access](#)



Create a business portfolio in Meta Business Suite

Create a business portfolio in Meta Business Suite

You can create a [business portfolio](#) to bring together and manage your organization's business assets – such as Facebook Pages, Instagram accounts and ad accounts – in one place with business tools such as Meta Business Suite.

Before you begin

- You must have access to Meta Business Suite, using either your Facebook profile or a managed Meta account.
- If you have a managed Meta account, you must have organization management permissions in [Organization Manager](#). If you click the link and you are redirected to **Home** in Meta Business Suite, this means you do not have access to Organization Manager. If you have people migration and/or IT settings access in Organization Manager, but not organization management permissions, then you will not be able to create a business portfolio.
- To keep our platform safe from harm and to prevent advertising abuse, we only grant access to some features when an advertiser has met certain requirements. This means when you create a new business portfolio or ad account, you may not have access to all advertising features. You can see what features you currently have access to, and find out what actions you may need to take to access additional features in [Business Support Home](#).

Create a business portfolio

To create a business portfolio for your organization:

1. Go to business.facebook.com and log in using your Facebook profile or managed Meta account.
2. Click the dropdown menu below **Home** in the top left.
3. Click **Create a business portfolio**.
4. Enter a name for the business portfolio. This should match the public name of your business or organization because it will be visible across Meta. The name of your business portfolio cannot contain special characters.
5. If you're logged into business.facebook.com with your Facebook profile, then you need to enter your first and last name and your business email. Meta will use this email to contact you about your business. It won't be visible to your customers.
 - If you're logged in with a managed Meta account, then you don't need to do this.
6. Click **Create** or **Create portfolio**. If you're creating a business portfolio using your Facebook profile, then you'll get an email asking you to confirm your business email address.

Note: You can personally create up to 2 business portfolios. There is no limit on the number of portfolios you can belong to.

After creating a business portfolio

After you've created your business portfolio, you get [full control](#) of it and you can add business assets, such as:

- [A Facebook Page](#)
- [An Instagram account](#)
- [An ad account](#)
- [An app owned by your organization](#)
- [A Meta Pixel](#)

Business assets can only belong to 1 business portfolio.

You can also [add people in your organization to join your business portfolio and assign them assets](#) to work on. You can also [add partners](#), such as people who work at an agency your organization works with. Your contact information will be visible to people who are added to the business portfolio.

Learn more

- [About business portfolio access](#)
- [Best practices for making a business portfolio more secure](#)
- [Set up and manage your business portfolio and business assets](#)

Create a business asset group in Meta Business Suite

Create a business asset group in Meta Business Suite

Use business asset groups to organize your assets and assign them to people and partners in Meta Business Suite. You can use business asset groups to manage assets for multiple brands, lines of business or regions.

Note: If you use the [Business Management APIs](#), you can edit and manage business asset groups in the API, but you'll need to create business asset groups using your business portfolio.

Create a business asset group

To create a business asset group:

1. Go to [Settings](#) in Meta Business Suite.
2. Below **Accounts**, click **Business asset groups**.
3. Click **Create Business asset group** in Meta Business Suite.
4. Decide how you'd like to organize your assets. For example, you can group them by brand, line, region, agency or something else.
5. Enter a **Business asset group name** and click **Create**.
6. Select the assets you'd like to include and click **Add assets**.
7. (Optional) Select the people who need to work on those assets and assign permissions for each asset type.
8. Use the toggles to set permissions for assets in the business asset group.
 - If you have selected individual people in step 7, note that these permissions will apply to their access as well.
9. Click **Done**.

Confirmation that you've created your business asset group will appear on your screen.

Now you can add, remove or edit the assets in the business asset group. When you add a new asset, everyone added to the business asset group will be able to access that asset based on the permissions you defined for them.

You can also add, remove or edit the people and partners you share this business asset group with. Any permissions you have previously set to assets in the business asset group will also apply to newly added people or partners.

Learn more

- [About business asset groups](#)
- [Share a business asset group with a partner](#)
- [Add people to a business asset group](#)

Basics

[About accounts in your business portfolio](#)[About business asset groups in your business portfolio](#)

[About advertising on behalf of another business](#)

Set Up

[Add a Facebook Page to your organization's business portfolio in Meta Business Suite](#)[Add apps to](#)

[your business portfolio](#)[Advertise on behalf of another business in Meta Business Suite](#)

Create

[Create a business asset group in Meta Business Suite](#)

Manage

[Request access to a Page in Meta Business Suite](#)[Assign Pages to people in your business portfolio](#)

[Remove a Page from your business portfolio](#)[Remove someone's access to a Page that's in a](#)

[business portfolio](#)[Close an ad account that's in a business portfolio](#)[Best Practices for Page](#)

[management in Meta Business Suite](#)

Troubleshoot

[Troubleshoot ad account creation issues](#)

About connected business assets

About connected business assets

You can connect your organization's [business assets](#) – such as Facebook Pages, [Instagram professional accounts](#) and WhatsApp Business accounts – by adding them to the same [business portfolio](#) or by directly connecting them to each other.

Adding assets to the same portfolio doesn't automatically connect them directly to each other. To enable [certain features](#) like cross-posting or centralized management of transactions and analytics, a direct connection between assets may be needed.

Connecting business assets lets you access professional features and manage your online presence in one place. Here are some things you can do with connected business assets:

- Promote your content across multiple platforms more easily by crossposting to Facebook, Instagram and Threads, using Meta Business Suite.
- Manage your comments and messages from a centralized place using [Inbox](#) in Meta Business Suite.
- Run ads for your business across Facebook, Instagram and Threads.
- Create and manage [Shops](#) on Facebook and Instagram.
- Analyze insights across your Pages, Instagram accounts and Threads accounts.
- Bundle your [Meta Verified business subscription](#).
- Enroll in [monthly invoicing](#).
- View and manage all your business assets and the people who access them from [Settings in Meta Business Suite](#).

Learn more about connecting and disconnecting business assets, and how we use information across connected business assets below.

How to connect business assets

Connect business assets directly to each other:

- [Connect your Instagram account and Facebook Page](#)
- [Connect your Facebook Page and WhatsApp account](#)
- [Connect your Instagram account and WhatsApp account](#)

If you're connecting an Instagram account to another business asset, then it must be an Instagram [professional account](#).

Connect business assets by adding them to the same business portfolio:

- [Add a Facebook Page to your business portfolio](#)
- [Add an Instagram account to your business portfolio](#)
- [Add a Threads account to your business portfolio](#)
- [Add a Whatsapp account to your business portfolio](#)
- [Add business assets to a business portfolio](#)

Business assets need to be in the same business portfolio to be connected.

- If neither business asset you're connecting is in a business portfolio, then Meta will create a new business portfolio for you.
- If one of the business assets you're connecting is in a business portfolio, then the other business asset will be added to that business portfolio.

[Business portfolios](#) help businesses manage their business assets across Meta and gives them access to more functionality, such as [Meta Verified for businesses](#). Learn more about [setting up and managing your business portfolio and business assets](#).

How to disconnect business assets

Disconnect directly-connected business assets:

- [Disconnect your Instagram account and Facebook Page](#)
- [Disconnect your Facebook Page and WhatsApp account](#)
- [Disconnect your Instagram account and WhatsApp account](#)

Disconnect assets by removing them from a business portfolio:

- [Remove a Page from your business portfolio](#)
- [Remove an Instagram account from your business portfolio](#)
- [Remove a Threads account from your business portfolio](#)
- [Remove a Whatsapp account from your business portfolio](#)
- [Remove business assets from a business portfolio](#)

Other ways to disconnect business assets:

- [Switch back to a personal Instagram account](#)
- [Switch a Threads account to private](#)
- [Delete your business portfolio](#)

Note: You may also need to separately turn off certain features that are enabled via connected business assets, such as multi-placement [ads](#) and [Meta Verified](#).

How information may be shared between connected business assets

In addition to how we use your information as described in the [Privacy Policy](#), we'll also use information across your connected business assets to:

- Personalize content, suggestions, and marketing communications across your connected business assets.
- Deliver your ads to more relevant audiences and provide unified performance insights.
- Consolidate payments and manage transactions across profiles for Shops and other commerce features.
- Provide enhanced business tools, like centralized management and cross-posting in Meta Business Suite, and analytics by combining information from all connected assets.

In addition to what's outlined above, we'll use information about your connected business assets to provide commercial services and comprehensive customer support, and for internal management and planning of partnerships and sales teams.

Learn more

- [About connecting your professional Instagram account to a Facebook Page](#)

- [About linking WhatsApp Business with Facebook and Instagram](#)
- [About business portfolios](#)

Common support topics

[About advertising restrictions](#)

Business Help Center

[Troubleshoot a disabled or restricted account](#)

Business Help Center

[About Meta Business Support Home](#)

Business Help Center

[Fix a failed payment issue on Meta](#)

Business Help Center

Troubleshoot why you can't add or connect business assets to your business portfolio in Meta Business Suite

Troubleshoot why you can't add or connect business assets to your business portfolio in Meta Business Suite



Some features may not be available to you yet.

Read our troubleshooting advice if you're having issues [adding or connecting business assets](#) to your organization's business portfolio.

Note: You need to have [full control](#) of the business portfolio to add [business assets](#). Learn how to [submit a request to get full control of a business portfolio](#) if no one in your organization currently has full control of the business portfolio.

Troubleshoot adding a Facebook Page to your business portfolio

Click the dropdowns below to troubleshoot issues you may be having when trying to [add a Facebook Page to your business portfolio](#).

Page is in a different business portfolio than the one selected.

This means the Page you're trying to connect is in a different business portfolio. Each Page can only be in 1 business portfolio.

In this scenario, you can [request shared access to a Facebook Page](#). You could also be [added as a partner](#) to the other business portfolio.

Note: To request access to a Page, your business must not be [restricted from advertising](#) by Meta.

Page is not connected to the Commerce Manager account.

You can [connect business assets in Commerce Manager](#).

Learn how to [troubleshoot issues with business assets for your shops](#).

You can't log in

Find out how to [recover your Facebook account](#).

Troubleshoot adding an Instagram account to your business portfolio

Find out how to [troubleshoot Instagram and business portfolio connection errors in Meta Business Suite](#).

Troubleshoot adding a Threads account to your business portfolio

Find out how to [troubleshoot Threads and business portfolio connection errors in Meta Business Suite](#).

Troubleshoot adding an ad account to your business portfolio

Click the dropdowns below to troubleshoot issues you may be having when trying to [add an ad account to your business portfolio](#).

Learn what to do if you're having issues [creating a new ad account in your business portfolio](#).

Ad account is in a different business portfolio than the one selected.

This means the ad account you're trying to connect is in a different business portfolio. Each ad account can only be in 1 business portfolio.

In this scenario, you can [request shared access to an ad account](#). You could also be [added as a partner](#) to the other business portfolio.

Your business portfolio is not associated with this ad account.

This means the ad account you're trying to connect is linked to a different business portfolio.

Ad accounts that have already been linked to a business portfolio can't be moved to another one. If your ad account is owned by another business portfolio, then you can [request access to the ad account or create a new ad account](#) in your business portfolio.

It may be worth checking if the ad account has been added to any other business portfolios in your organization, if applicable. To do this, go to [Home](#) in Meta Business Suite, click the dropdown in the top left, then select any other business portfolio that may have been added to your organization. Then, go to [Ad accounts](#) in Settings for that business portfolio. If you can't access this, then you may not have full control of this business portfolio.

Learn how to [troubleshoot unrecognized activity on your ad account](#).

Personal ad account can't be added to your business portfolio. Please select another ad account or create a new one.

Personal ad accounts can only be added to a business portfolio if they meet [certain conditions](#). If necessary you can [create a new ad account](#) in your business portfolio.

Accounts with payment methods managed by a third party can't be moved.

The ad account you've chosen is managed by a third party. Ad accounts managed by third parties can't be moved by Meta. You'll need to [create a new ad account](#).

Troubleshoot adding a catalog to your business portfolio

Click the dropdowns below to troubleshoot issues you may be having when trying to add a catalog to your business portfolio.

Catalog is in a different business portfolio than the one selected.

This means the catalog you're trying to connect is in a different business portfolio.

Learn how to [request to transfer a catalog into your business portfolio](#).

You can also request access to a catalog by going to [Catalogs](#) in Meta Business Suite Settings (if you can't see this, then you may not have full control of the business portfolio), clicking **Add**, selecting **Request access to a catalog** and then following on-screen instructions.

You could also be [added as a partner](#) to the other business portfolio.

Catalog is not associated with the shop tied to your Page or Instagram Account.

Learn how to [check which catalog is connected to your shop in Commerce Manager](#).

Catalog is already associated with a shop tied to a different Page or Instagram Account.

Learn how to [check which catalog is connected to your shop in Commerce Manager](#).

If your business portfolio is not eligible for advertising

You may need to [update your payment method](#).

If your payment method is up to date, then your business portfolio has been disabled because it doesn't comply with our [Advertising Standards](#). You can [request a review](#) of this decision.

Learn more

- [Set up your Meta Pixel with a business portfolio](#)
- [Troubleshooting Meta Pixel error and warning messages](#)
- [Assign business assets to people in your business portfolio in Meta Business Suite](#)

Common support topics

[About advertising restrictions](#)

Business Help Center

[Troubleshoot a disabled or restricted account](#)

Business Help Center

[About Meta Business Support Home](#)

Business Help Center

[Fix a failed payment issue on Meta](#)

Business Help Center

[Basics](#)

[About Business Apps in Meta Business Suite desktop](#)[Available Business Apps for Meta Business Suite desktop](#)[About Meta Pixel](#)[About catalogs in Commerce Manager](#)[About shopping on Instagram](#)

[Set Up](#)

[Connect to Business Apps in Meta Business Suite desktop](#)

[Manage](#)

[Disconnect Business Apps in Meta Business Suite desktop](#)[About business portfolio access](#)

[Troubleshoot](#)

[What to do if you can't add or connect your business asset](#)[How to troubleshoot Meta Pixel error and warning messages in Meta Events Manager](#)