Meta Ads checklists

Menu names can change. Meta's own Help Center is the final word.

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You can type in this one on screen, and it has a one page summary to hand over.

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Facebook ads account audit

Menu names can change. Meta's own Help Center is the final word.

Work down the list. For each line tick OK, Fix or Not applicable. There is no score to reach. The summary is for you to hand over.

You can type in the boxes on screen and save a copy, or print it and tick by hand.

Access and ownership

1. Who has access to the ad account

OK ☐ Fix ☐ N/A ☐

Where to look: Meta Business Suite, Settings, Users. The menu words can differ.

A problem looks like: Someone who has left, or an agency you no longer use, still has access

Note

2. Who owns the ad account, Page and pixel

OK ☐ Fix ☐ N/A ☐

Where to look: Meta Business Suite, Settings, Accounts and Data sources. The menu words can differ.

A problem looks like: A key asset belongs to another business or a personal profile

Note

3. Payment method

OK ☐ Fix ☐ N/A ☐

Where to look: Billing and payments

A problem looks like: A failed payment or an expired card

Note

4. Account spending limit

OK ☐ Fix ☐ N/A ☐

Where to look: Payment settings

A problem looks like: A limit close to spend so far, with no plan for reaching it

Note

Tracking

5. The pixel is recording

OK ☐ Fix ☐ N/A ☐

Where to look: Events Manager, Overview

A problem looks like: No recent activity, or an event missing from a page

Note

6. The event each campaign aims for is recorded

OK ☐ Fix ☐ N/A ☐

Where to look: Events Manager, Test events

A problem looks like: A campaign aims for an event that rarely or never fires

Note

7. Server events, if you use them

OK ☐ Fix ☐ N/A ☐

Where to look: Events Manager, Settings

A problem looks like: Events only from the browser, or one sale counted twice

Note

8. Purchase values are sent

OK ☐ Fix ☐ N/A ☐

Where to look: Events Manager, event details

A problem looks like: Purchases with no value or currency, so ROAS cannot be read

Note

9. Numbers match your own records

OK ☐ Fix ☐ N/A ☐

Where to look: Ads Manager against your shop or sign-up list

A problem looks like: A gap nobody can explain

Note

10. Links carry URL parameters

OK ☐ Fix ☐ N/A ☐

Where to look: Ad level, Tracking

A problem looks like: Ads with none, or mixed naming

Note

Campaign structure

11. Each campaign has one clear goal

OK ☐ Fix ☐ N/A ☐

Where to look: Campaigns tab, Objective

A problem looks like: The objective does not match what you report on

Note

12. Names say what a campaign is

OK ☐ Fix ☐ N/A ☐

Where to look: Campaigns tab

A problem looks like: You cannot tell from the name what it is for

Note

13. Ad sets are not chasing the same people

OK ☐ Fix ☐ N/A ☐

Where to look: Ad set level, Audience

A problem looks like: Several ad sets aim at the same audience

Note

14. Delivery status

OK ☐ Fix ☐ N/A ☐

Where to look: Delivery column

A problem looks like: A status such as Learning limited that nobody has looked at

Note

15. Old items are cleared

OK ☐ Fix ☐ N/A ☐

Where to look: Campaigns tab, all statuses

A problem looks like: So many old items that live ones are hard to find

Note

Budget and spending

16. Where each budget is set

OK ☐ Fix ☐ N/A ☐

Where to look: Campaign and ad set settings

A problem looks like: Nobody knows whether it is set at campaign or ad set level

Note

17. Daily or lifetime, and end dates

OK ☐ Fix ☐ N/A ☐

Where to look: Ad set settings

A problem looks like: A lifetime budget ending soon with no plan

Note

18. Spend against the plan

OK ☐ Fix ☐ N/A ☐

Where to look: Amount spent column

A problem looks like: Most spend is on a campaign nobody chose to favour

Note

19. Bid strategy and any cap

OK ☐ Fix ☐ N/A ☐

Where to look: Ad set settings

A problem looks like: A cap nobody remembers setting

Note

Audience

20. Location, age and language

OK ☐ Fix ☐ N/A ☐

Where to look: Ad set, Audience

A problem looks like: It includes places or people you cannot serve

Note

21. Exclusions

OK ☐ Fix ☐ N/A ☐

Where to look: Ad set, Audience

A problem looks like: Recent buyers still see ads for what they bought

Note

22. Custom audiences still update

OK ☐ Fix ☐ N/A ☐

Where to look: Audiences

A problem looks like: A source has stopped or an audience shows a warning

Note

23. Frequency over time

OK ☐ Fix ☐ N/A ☐

Where to look: Frequency column, week by week

A problem looks like: Frequency keeps rising while results fall

Note

Creative

24. Each ad set has more than one ad

OK ☐ Fix ☐ N/A ☐

Where to look: Ads tab

A problem looks like: One ad carrying a whole ad set, with nothing to compare it with

Note

25. Rejected or limited ads

OK ☐ Fix ☐ N/A ☐

Where to look: Delivery column, Account Quality

A problem looks like: An ad you thought was running was rejected

Note

26. Results over time per ad

OK ☐ Fix ☐ N/A ☐

Where to look: Ads tab with a date range

A problem looks like: The same ad running while its results fall

Note

27. The landing page matches the ad

OK ☐ Fix ☐ N/A ☐

Where to look: Open the link on a phone

A problem looks like: A different offer, a broken link or a page that will not load

Note

28. Comments on your ads

OK ☐ Fix ☐ N/A ☐

Where to look: Ad preview, or the Page

A problem looks like: Questions left unanswered

Note

Placements

29. Spend by placement

OK ☐ Fix ☐ N/A ☐

Where to look: Breakdown by placement

A problem looks like: Spend on a placement with no results that nobody has looked at

Note

30. Creative fits each placement

OK ☐ Fix ☐ N/A ☐

Where to look: Ad preview

A problem looks like: Text cut off in Stories or Reels

Note

Reporting

31. Totals are right

OK ☐ Fix ☐ N/A ☐

Where to look: Your report

A problem looks like: Reach added across rows, or a rate averaged from rows

Note

32. Who gets a report, and how often

OK ☐ Fix ☐ N/A ☐

Where to look: Your own list

A problem looks like: Nobody is reading it

Note

One page summary

Fill this in once you have worked down the list, then hand it over.

Account	Reviewed by	Date

How many lines you marked

OK	Fix	Not applicable

The three things to fix first

1.
2.
3.

What is working

Who does what

What	Who	By when

The counts are for your own use. They are not compared with any other account.

Facebook ads launch checklist

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Print one for each campaign.

Campaign | Launch date | Checked by

Tracking

- [ ] The pixel fires on the landing page.
- [ ] The event you chose records in Test events.
- [ ] You know which attribution setting you will report on.

Budget

- [ ] The amount and currency are right for this ad account.
- [ ] Start and end dates are right.
- [ ] Daily or lifetime is what you meant.
- [ ] The account spending limit can carry it.

Audience

- [ ] Location, age and language are right.
- [ ] Exclusions are set.
- [ ] If the ad is about housing, employment or financial products and services, you have checked whether Meta asks you to declare a Special Ad Category, and declared it if so.
  Discriminatory Practices: transparency.meta.com/policies/ad-standards/unacceptable-content/discriminatory-practices/

Creative

- [ ] Previewed in each placement.
- [ ] Spelling and prices are checked.
- [ ] You have the rights to images, video and music.
- [ ] It still makes sense with the sound off.
- [ ] The call to action matches the page.

URLs

- [ ] The link opens on a phone.
- [ ] Each ad has URL parameters.
- [ ] A test click shows them.
- [ ] The thank-you page records the event.

Review

- [ ] The ad meets Meta's Advertising Standards.
  Meta Advertising Standards: transparency.meta.com/policies/ad-standards/
- [ ] You have read Meta's page on ad review and left time for it.
  The ad review process: transparency.meta.com/policies/ad-standards/#ad-review-process
- [ ] Campaign status is what you meant at launch.
- [ ] Someone is named to check it on day one.
- [ ] The launch date is noted for your report.

Meta Ads weekly and monthly optimization

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A routine to follow. Change one thing at a time, and write it down.

Weekly, budget

- [ ] Spend against plan.
- [ ] Any ad set running out of budget early.
- [ ] Spend with no results.

Weekly, audience

- [ ] Frequency week by week.
- [ ] Any audience warning.

Weekly, creative

- [ ] Ads whose results are falling.
- [ ] Rejected ads.
- [ ] One new test running.

Weekly, placements

- [ ] The breakdown by placement.
- [ ] Spend on a placement with no results.

Monthly, budget

- [ ] Move budget using your own cost per result.
- [ ] Check next month's plan.

Monthly, audience

- [ ] Custom audiences still update.
- [ ] Exclusions still right.

Monthly, creative

- [ ] Retire ads you have finished with.
- [ ] Write down what you learned.

Monthly, placements

- [ ] Compare with last month.

Change log

Record each change, so you can tell what caused what.

Date	What changed	Why	What you expect	What happened

Black Friday Facebook ads checklist

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Work in this order. Meta's page says how long ad review can take.

Weeks before

- [ ] Sale dates, offer and stock agreed.
- [ ] Budget plan written.
- [ ] Payment method and account spending limit can carry the extra spend.
- [ ] Events record correctly.
- [ ] New ads made and submitted, leaving room for ad review.
  The ad review process: transparency.meta.com/policies/ad-standards/#ad-review-process
- [ ] The landing page can carry the sale.
- [ ] Audience lists updated.

Days before

- [ ] Ads approved and scheduled.
- [ ] The ad account's time zone is checked against the schedule.
- [ ] Budget changes are ready.
- [ ] Someone is named for each sale day.
- [ ] Checkout tested on a phone.
- [ ] A test purchase recorded.

During the sale

- [ ] Spend against plan each morning.
- [ ] Rejected ads checked.
- [ ] Ads for items sold out are paused.
- [ ] Each change noted with the time.

After the sale

- [ ] Sale ads ended.
- [ ] Export broken down by day, and by placement as well if Ads Manager allows both together.
- [ ] Compare in the Black Friday report file.
  The Black Friday report file: dashops.io/downloads/black-friday-facebook-ads-report.xlsx

Facebook ads compliance checklist

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Tick a line once you have read the page it points to, or checked what it names.

> This checklist is not legal advice. It points to Meta's own Advertising Standards, which Meta changes. Read on 3 November 2026. Meta's page is the final word. If in doubt, ask a lawyer.

Before you publish

- [ ] Read the Unacceptable content section, which lists Discriminatory Practices and the pages beside it.
  Unacceptable content: transparency.meta.com/policies/ad-standards/#unacceptable-content
- [ ] Read Prohibited Commercial Practices.
  Prohibited Commercial Practices: transparency.meta.com/policies/ad-standards/deceptive-content/prohibited-commercial-practices/
- [ ] If you sell alcohol, health products, financial services, dating, crypto, gambling or other listed goods, read that page under Restricted goods and services.
  Alcohol: transparency.meta.com/policies/ad-standards/restricted-goods-services/alcohol/
  Health and Wellness: transparency.meta.com/policies/ad-standards/restricted-goods-services/health-wellness/
  Financial and Insurance Products and Services:
  transparency.meta.com/policies/ad-standards/restricted-goods-services/financial-services/
  Dating Ads: transparency.meta.com/policies/ad-standards/restricted-goods-services/dating-ads/
  Cryptocurrency Products and Services:
  transparency.meta.com/policies/ad-standards/restricted-goods-services/cryptocurrency-products-and-services/
  Online Gambling and Games: transparency.meta.com/policies/ad-standards/restricted-goods-services/gambling-games/
  The full list: transparency.meta.com/policies/ad-standards/#restricted-goods-and-services
- [ ] Check you hold the rights to what you use.
  Third-Party Intellectual Property Infringement:
  transparency.meta.com/policies/ad-standards/intellectual-property-infringement/third-party-infringement/
- [ ] If the ad touches a social issue, an election or politics, read that page.
  Ads about Social Issues, Elections or Politics: transparency.meta.com/policies/ad-standards/SIEP-advertising/SIEP/
- [ ] Check the Product and format-specific policies for your format: Video Ads, Lead Ads, Targeting, Relevance, Branded Content.
  Product and format-specific policies: transparency.meta.com/policies/ad-standards/#product-and-format-specific

Special ad categories

- [ ] Financial products and services, housing, or employment? Meta asks some advertisers to declare a Special Ad Category. Read Discriminatory Practices: it says which advertisers this applies to, by country.
  Discriminatory Practices: transparency.meta.com/policies/ad-standards/unacceptable-content/discriminatory-practices/
  Meta's help page on ads for housing, employment or financial products and services: facebook.com/business/help/399587795372584
  How to Choose a Special Ad Category: facebook.com/business/help/298000447747885
- [ ] Check your targeting still follows those rules after you declare it.

Landing page

- [ ] Meta's review can include the page your ad links to. Check it works, on a phone.
  The ad review process: transparency.meta.com/policies/ad-standards/#ad-review-process
- [ ] What the ad promotes is what the page offers (Relevance).
  Relevance: transparency.meta.com/policies/ad-standards/#product-and-format-specific
- [ ] The price and terms on the page match the ad.
- [ ] If you use a lead form, read the Lead Ads rules on which questions need Meta's written permission, and check the form links to your own privacy policy.
  Lead Ads: transparency.meta.com/policies/ad-standards/#product-and-format-specific

If an ad is rejected

- [ ] Read "What to do if your ad is rejected or if your business asset is restricted" on the main Advertising Standards page.
  If your ad is rejected: transparency.meta.com/policies/ad-standards/#ad-rejected
- [ ] Note the reason in your change log before you edit anything.