



Facebook Ads Setup

From Zero to Inquiries: A Practical B2B Export Guide

- ✓ Account registration & safe warm-up
- ✓ Create Pages & Business Portfolio
- ✓ Full breakdown of the 3-level ad structure
- ✓ Audience, creatives & copy setup
- ✓ Practical advice for B2B exporters

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Is Facebook Right for B2B?

 Important: Facebook has no “company account”. You log in with a personal account. Company Pages and ad accounts are created separately.

1

Install WhatsApp before registration (tested in 2026)

Register WhatsApp with your phone number first, then use the same number for Facebook. The verification code may go to WhatsApp, which greatly improves success and avoids SMS code issues.

2

Use real personal information

Your name and birthday must be real. Meta may request face verification at any time. Fake information makes appeals extremely hard and can waste the account.



3

Warm up the account first. Do not run ads too soon.

After registration, browse the feed, watch videos, and post a few updates or short videos so Meta sees you as a real person. Running ads with a brand-new account carries a high ban risk.

Create a Page & Business Portfolio

Create a Company Page

-  Desktop: top-right profile photo → “Create”
-  Mobile: top-left menu → “Pages” → “Create”
- Choose the “Company/Business” category; fill in the name and bio
 - Upload the company logo and cover; post several product updates
 - Do not leave the Page empty. Customers use it to judge your credibility.

Create a Business Portfolio

- Enter Meta Business Suite from the Page sidebar
- Click the top-left dropdown → find “Business Portfolio”
- Click “Create Business Portfolio” and enter the company name
- Connect Instagram and WhatsApp Business
- After setup, ads can show on FB, IG, WA, and third-party sites

Two ad account types — many people mix them up

Page “Ad Center” account = simplified version. No Meta Pixel or pro tools. Balance is not shared with the Business Portfolio account.
Business Portfolio account = professional version with full tools. Use this for B2B ads.

Risk

separation:

If your personal account is banned, the Page and ad account may be lost. Invite other personal accounts to co-manage the Page, and add backup admins to the ad account for double-layer risk control.



Personal Ad Account

Best for:

Export beginners who want to test with a small budget

Pros:

- ✓ Easy to create, ready to use
- ✓ No business license required

Cons:

- ✗ Higher ban risk and harder appeals
- ✗ Some feature limitations



Business Ad Account

Best for:

Export companies with long-term plans and a real budget

Pros:

- ✓ More stable account, lower ban risk
- ✓ A Meta agency may help with appeals after a ban
- ✓ Higher limits and fuller features

Cons:

- ✗ Requires a business license, Meta agency application, and minimum top-up

💡 Practical advice: Use a personal account first to validate the ad logic and whether the product can generate inquiries. Once it works, upgrade to a business account for stable long-term delivery. Do not spend big before validation.

3-Level Ad Structure: Campaign → Ad Set → Ad

🔑 Entry point: Page → Meta Business Suite → Ads tools → Campaigns → click the green “Create” button

Campaign

One product direction or one promotion objective

- ▶ Buying type: Auction (best for B2B) vs Reservation
- ▶ Objective: choose “Leads” to collect inquiries directly
- ▶ Budget: campaign budget or separate ad set budgets
- ▶ Bid strategy: “Highest volume” to maximize leads

Ad Set

Delivery settings for each target customer group

- ▶ Conversion location: Instant Form / WhatsApp / Website
- ▶ Audience: who your target customers are (next slide)
- ▶ Placements: usually keep default; Facebook optimizes automatically
- ▶ Schedule: start/end date; delivery hours can be set

Ad


The actual ad content customers see

- ▶ Creative: image or video (factory/loading videos recommended)
- ▶ Copy: primary text, headline, description (up to 5 each)
- ▶ CTA: Get Quote / Send Message / Learn More
- ▶ Instant Form: create questions here to collect inquiries

Audience Setup: Who Sees Your Ads and Lead Quality

Saved Audience (cold start)

Use this when you have no historical data

- ▶ Manually select location, age, gender, interests, and industries based on your customer profile
- ▶ No customers yet? Check competitors' customs data or prospectuses to find top customer types
- ▶  Region defaults to China. Change it to your target market.
- ▶ Start with 1–3 target countries. Do not go too broad.

Custom Audience (precise remarketing)

Advertise again to people who already touched your brand

- ▶ Upload a customer list (100+ entries, in Meta template format)
- ▶ Website visitors (requires Meta Pixel installed)
- ▶ People who watched your videos / visited your Page
- ▶ People who opened your Instant Form (high intent, strongly recommended)

Lookalike Audience (scaling tool)

Find people similar to your existing customers

- ▶ Create from a Custom Audience; closed customers are the best source
- ▶ 1% = most similar but smaller; 10% = larger but less precise
- ▶ Beginners should start testing from 1%–3%
- ▶ More source data means higher accuracy; 100+ customer records work better

Creatives & Copy: Make Customers Want to Ask

What should you shoot?

- Real factory workshop footage (show scale and strength)
- Warehouse and bulk-loading videos (prove stable supply)
- Raw materials → assembly → finished product process (show workmanship)
- Product testing or QC (build trust)
- Ratios: 16:9, 9:16 vertical, 1:1
- Target-market voiceover + positive background music



How should you write copy?

- Primary text matters most: appears in most placements; write up to 5 versions
- Headline + description appear in some placements; test multiple versions too
- Use AI for copy; reference Brian Dean / Jim Edwards: simple, clear, powerful
- Focus on pain points and core strengths: fast delivery / certificates / DDP
- Use direct CTA: “Get Quote Now” converts better than “Learn More”

Instant Form — Core Tool for B2B Lead Collection

Customers fill it in directly inside Facebook, with no website jump, very low friction, and high lead volume. Require company info + contact details. Keep extra questions to max 3 to screen intent. Add a WhatsApp link so high-intent customers can contact you directly.

Up to 5 primary texts

System tests which one gets the best CTR

Up to 5 headlines

Rotate selling points to find the best mix

Form questions

Max 3 questions to screen high-intent leads

Budget Settings & Bidding Strategy

Budget Type Comparison

Daily Budget

Set a daily amount; Meta adjusts flexibly. You can set budget scheduling to increase on specific dates, but cannot choose exact delivery hours.

Lifetime Budget

Set the total budget for the whole campaign. You can choose ad scheduling to run during working hours, but cannot set budget scheduling.

💡 From my tests: all-day delivery can sometimes perform better than fixed time slots. Test both.

Bid Strategy

Beginner

Highest Volume

Meta auto-bids to get as many inquiries as possible. No manual bid needed.

Advanced

Cost per Result Goal

Set a target average cost per lead, e.g. ¥10/lead, to control CPL.

Expert

Bid Cap

Set the maximum bid per auction. Precise cost control, but volume may slow down.

Is Facebook Advertising Suitable for B2B Export Products?

Core question: Are your target customers active on Facebook / Instagram? Search product keywords first. Check whether competitors are running ads and whether there is engagement, then decide.

✓ Suitable cases

- ▶ Machinery, industrial products, and electrical equipment
- ▶ Target markets: Russia, Middle East, Southeast Asia, Africa, Latin America
- ▶ Frequent repeat orders and high order value (¥200,000+)
- ▶ Real factory, warehouse, and product video materials are available
- ▶ Willing to test and optimize continuously for 1–3 months

⚠ Things to note

- ▶ Ads do not work instantly; B2B decision cycles are longer
- ▶ If budget is too small, do not start; test from at least ¥50/day
- ▶ For consumer products, use “Website” conversion to filter out individual buyers
- ▶ Facebook Shops are not open to China-region businesses; drive traffic to your website
- ▶ Estimated lead volume is only a reference; actual results matter most

What is A/B testing?

Duplicate one ad into two versions and change only one variable, such as the creative. Run both at the same time. Turn off the weaker one and add budget to the better one. Iterate step by step, and performance keeps improving.



Action Checklist: Do It in Order, Skip Nothing

01

Register WhatsApp with your phone number first, then use the same number for Facebook

02

Warm up the account for 1–2 weeks: browse, post, and let Meta see you as real

03

Create a company Page, upload logo/cover, and post several product updates

04

Enter Meta Business Suite, create a Business Portfolio, and connect Instagram + WhatsApp Business

05

Create an ad account in the Business Portfolio (test with a personal account first)

06

Set up a saved audience in advance: countries, industries, and job keywords

07

Prepare 3+ videos: factory, warehouse, loading; add target-market voiceover

08

Use AI to write 3+ primary text versions: simple, conversational, pain-point focused

09

Create the ad: choose “Leads” → conversion location “Instant Form” → create the form

10

Run a small-budget test for 7–14 days, analyze data, A/B test creatives/copy, and scale winners

Do not chase perfection at the start. Run it first, then you get data. With data, you can optimize. With optimization, real inquiries come.