



Instagram Connection Onboarding

Client account setup checklist

Date: _____

Overview

This onboarding guide explains what is required to connect a new client Instagram account to the Dott Media platform for publishing, analytics, and automated engagement.

Estimated time: 20-40 minutes

Account prerequisites

- Instagram account is Business or Creator.
- Instagram is linked to a Facebook Page.
- Client has admin or full control of the Page in Meta Business Manager.
- Dott Media user account is active and verified.

Technical prerequisites

- Meta Developer app with Instagram Graph API enabled.
- App status is Live.
- Advanced Access approved for required permissions.
- Webhook verify token configured for Instagram events.

Required permissions

Permission	Why it is needed
instagram_basic	Access the Instagram Business Account profile and media basics.
pages_show_list	List Facebook Pages linked to the Instagram account.

Permission	Why it is needed
instagram_content_publish	Publish posts and reels.
pages_read_engagement	Read Page engagement for analytics.
instagram_manage_comments	Reply to comments and moderate engagement.
instagram_manage_messages	Send and reply to Instagram DMs.
instagram_manage_insights	Access Instagram insights for reporting.
pages_manage_metadata	Subscribe the Page to Instagram webhooks.

Connection steps

1. Confirm the Instagram account type and Page link in Meta Business Suite.
2. Open the Meta Developer app and add Instagram Graph API and Webhooks.
3. Request Advanced Access for all permissions listed above.
4. Generate a user access token with those permissions, then exchange it for a long-lived token.
5. Fetch the Page access token and Instagram Business Account ID:

```
GET /me/accounts?
fields=id,name,access_token,instagram_business_account{id,username}
```

6. Collect the Page access token and the Instagram Business Account ID.
7. In the Dott Media app, go to Account Integrations and enter:
 - Instagram access token (Page access token).
 - Instagram account ID (business account ID).

Data we store per user

- Instagram access token (Page token).
- Instagram Business Account ID.
- Optional: Instagram username for display.

If the account ID is not provided, Dott Media will attempt to resolve it from the access token.

Verification checklist

- Instagram status shows Connected in the Integrations screen.
- Test post or reel succeeds.
- Comment reply and DM reply work (if those permissions are enabled).
- Insights appear in the analytics view.

Dott-Media AI-Powered Digital Solutions

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