## **Yellow Mark** - Data To Be Taken from Customer/Brand/Agency **Purple Mark** - Data To Be Generated By Our Tool **Green Mark** - Live Operations and Outputs By Our Tool **1️⃣ Setup & Brand Inputs (Pre-Campaign)**

These are the details you collect from the advertiser to prepare and optimize the campaign:

### **Account & Billing**

* **Business Manager Account**
* **Ad Account ID & currency**
* **Payment Method / Billing**

### **Brand & Product Details**

* Business name, mission, USP
* Product/service descriptions & use cases
* Visual identity: logos, brand colors, tone/voice

### **Campaign Objectives & KPIs**

* Objective: awareness, traffic, engagement, leads, sales, etc.
* Budget: daily vs. lifetime, total cap
* Schedule: start/end date, scheduling rules

### **Audience Definition & Targeting Inputs**

* Locations: countries, regions, cities, radius targeting
* Age range & gender
* Languages
* Interests / behaviors / demographics
* Custom audiences: uploads, website visitors, app users
* Lookalike audiences
* Platform-specific flags: special ad categories (credit, housing, employment)

### **Creative Assets & Copy**

* Primary text (up to ~125 characters)
* Headline (~27 characters)
* Link description
* Media: images, video, carousel assets
* Call-to-action button (Shop Now, Learn More, etc.)

### **Advanced Settings**

* Placements: automatic vs. manual (FB feed, IG stories, Messenger)
* Optimization goal (e.g. optimize for link clicks or conversions)
* Ad scheduling & dayparting
* Conversion tracking: Meta Pixel, SDK or Conversions API

## **2️⃣ Campaign Structure & Generation (Campaign Build)**

This is how Meta organizes your campaign through the Marketing API:

### **Account Structure**

* **Campaign** → sets the objective and overall budget/cap
* **Ad Sets** → define target audience, schedule, budget allocation, optimization & placement
* **Ads (Creatives)** → each contains one ad creative (image/video) with copy and CTA

### **Targeting Options**

* Demographics: age, gender, language
* Geolocation: country, state, city, radius
* Interests / behaviors / traits (via taxonomy)
* Custom & lookalike audiences
* Exclusion rules (exclude current customers, etc.)

### **Optimization & Delivery**

* Optimization goal per ad set (e.g., link clicks, conversions)
* Bidding strategy (cost cap, value optimization, manual/bid, ROAS-based)
* Budget allocation: campaign budget optimization (CBO)
* Delivery type: standard vs. accelerated
* Advantage+ tools (for placements, audience, budget filling via AI)
* Learning phase detection
* Frequency & pacing controls

## **3️⃣ Campaign Delivery & Live Operation**

These involve what Meta does during the campaign run and how it targets users:

### **Ad Serving**

* Auction algorithm: bids vs. ad quality vs. relevance score
* Placement options: Facebook News Feed, Instagram, Audience Network, Messenger
* Auction performance factors: ad relevance diagnostics (Quality, Engagement, Conversion rankings)
* Delivery pacing and cap frequencies

### **Automated Features**

* Advantage+ placements, audience, budget
* Dynamic creative testing
* Campaign learning & optimization phase
* Delivery insights (auction overlap detection)

### **Retargeting & Funnels**

* Website retargeting via Pixel / Custom Audiences
* App retargeting via SDK audiences
* Lookalike audience expansion
* Sequential messaging and nurture funnels

## **4️⃣ Reporting, Metrics & Optimization Feedback**

What Meta returns once ads are live—and what components go into dashboard analytics and recommendations:

### **Campaign Status**

* Current status: ACTIVE, PAUSED, DISAPPROVED, IN\_REVIEW, FINISHED
* Status changes and review feedback

### **Ad & Ad-Set Performance Metrics**

* Reach & Impressions
* Clicks (all, link-inlined, outbound)
* Click-through rates (CTR)
* Conversions / Leads / Purchases / Installs
* Cost metrics: CPC, CPM, CPL, CPA, ROAS
* Spend vs Budget tracking
* Frequency and recency metrics
* Video metrics (30s viewers, avg watch time)
* Engagements: likes, shares, comments
* Quality ranking & conversion rate ranking diagnostics

### **Audience and Breakdown Insights**

* Demographics: age, gender
* Location breakdowns (countries, cities, regions)
* Time of day performance (by advertiser or audience timezone)
* Placement breakdown (where ads ran)
* Device type performance (mobile, desktop)
* Action type breakdowns

### **Diagnostics & Recommendations**

* Ad relevance diagnostics by manual classification
* Automated rules (e.g. low performance auto-pause)
* Alerts for policy violations, budget overspend, high frequency/burnout
* Winner determination (best-performing ad/segment)
* Suggestions: replace creative, adjust targeting, optimize bids/budget

### **✅ Summary Checklist (All-Inclusive)**

1. **Account Setup**: Business Manager, Ad Account, Billing & Payment
2. **Campaign Details**: Objective, Budget, Schedule
3. **Targeting Criteria**: Demographics, Geos, Interests, Custom/Lookalike
4. **Creative Assets**: Media, Text, Headline, CTA
5. **Settings**: Optimization goal, Bidding, Placements, Scheduling
6. **Automation Tools**: Advantage+, Dynamic Creatives, CBO
7. **Delivery**: Auction, Learning, Serving, Pacing
8. **Retargeting**: Pixel, App SDK, Custom audiences
9. **Status Tracking**: Live status, review, disapproval reasons
10. **Real-time Metrics**: Spend, Reach, Impressions, Clicks, Conversions, Cost
11. **Breakdown Reports**: Audience, Placements, Time, Device
12. **Diagnostics**: Relevance, Frequency, Quality
13. **Alerts & Actions**: Burnout, rule-based pauses, violations
14. **Optimization Advice**: Top ad/segment, creative refresh, budget shifts
15. **Post-Campaign Outputs**: ROI, performance summaries, ad archive

This 360° view covers the **entire lifecycle** of a Meta ad—from preparatory inputs, through live targeting and optimization, to reports and actionable feedback. Let me know if you'd like templates for any of the above steps or examples of API object schemas!