REFERENCE GUIDE

Facebook Lead Ads

Facebook leads from ad to contact

The Facebook Card and Tour

What It Is

The Facebook / Instagram card on the Integrations screen is your control center. It shows if a page is linked and holds the menu for managing it.

How It Works For Your Business

- Search for Integrations and find the Facebook card.
- The card shows Connect until a page is linked, then a Connected state.
- Look at the top of the screen for the Facebook Form Field Mapping link.
- Click the card's three dots and look for options like Manage Pages, Troubleshoot, and Disconnect.
- Leads land in your Contacts list, and a workflow trigger can act on them right away.

The Facebook Card and Tour - Tips & Guidelines

Tips

- Check the card first when leads seem slow.
- Labels on the three-dot menu can vary, so go by your screen.
- Preview the workflow trigger before you build anything.
- Note Connect or Connected when you check in.

DO

- Check the card state often
- Learn the three-dot menu
- Read the labels on screen
- Find the mapping link

DON'T

- Click Disconnect by accident
- Assume the card is linked
- Skip the mapping link
- Guess at menu names

Connecting Your Page

What It Is

Connecting links your Facebook business page to your software so lead form fills flow into Contacts. It needs the right role and the right permissions.

How It Works For Your Business

- Be an admin of the Facebook page with access to the Business Manager tied to it.
- Click Connect on the card and log in through the Facebook pop-up.
- Approve access to your leads and your page data on the permission screens.
- Search for your page, select it, choose a sync option, and click Connect and Continue.
- Look for the green Integration successful banner. Instagram accounts linked to the page can come along.

Connecting Your Page – Tips & Guidelines

Tips

- Check you are logged into the right Facebook profile first.
- The page and ad account should have the same owner.
- If your page is missing, run the connect steps again and share it.
- Facebook screens change, so read each one before clicking.

DO

- Confirm admin access first
- Approve leads and page data
- Keep your ad page selected
- Look for the green banner

DON'T

- Click through permissions fast
- Turn off lead access
- Use the wrong Facebook login
- Skip the success check

Mapping Form Fields

What It Is

Mapping tells your software which Facebook form question goes into which contact field. Each form has its own mapping, so every new form needs one.

How It Works For Your Business

- Click Facebook Form Field Mapping at the top of Integrations to see your lead forms.
- A blue checkmark next to a form means it is mapped and in sync.
- Open a form and use each dropdown to match a question to a field.
- Match name to First Name, email to Email, phone to Phone, and extras to custom fields.
- Click Update Mapping to save. Supported custom types are text, large text, number, phone, monetary, single option, date, dropdown, radio, and checkbox.

Mapping Form Fields - Tips & Guidelines

Tips

- Do the basics first: name, email, and phone make a lead you can follow up with.
- If a custom field is missing, check its type.
- Dropdown or radio fields suit multiple choice questions.
- Check the form name inside your Facebook ad if unsure.

DO

- Map every new form
- Click Update Mapping
- Read each question aloud
- Check custom field types

DON'T

- Skip Update Mapping
- Put phone in email
- Assume mapping is account-wide
- Ignore forms with no checkmark

Testing with a Test Lead

What It Is

Facebook's Lead Ads Testing Tool sends a fake lead through your form. Your software treats it like a real one, so you can fix problems before a customer is affected.

How It Works For Your Business

- Open developers.facebook.com in a new tab and find the Lead Ads Testing Tool.
- Choose your page and your lead form, then click Create Lead.
- Refresh Contacts and open the new contact.
- Check name, email, and phone, then look at the Activity area for the Facebook source.
- Delete the test lead in the tool before a repeat test, and delete the test contact afterward.

Testing with a Test Lead – Tips & Guidelines

Tips

- Picking the wrong form is the most common mistake.
- Facebook often blocks repeat tests on the same lead.
- Test after every change to mapping or forms.
- Delete test contacts so no real follow-up is triggered.

DO

- Test before real ads run
- Check every mapped field
- Look at the source
- Delete test contacts

DON'T

- Test on a real lead
- Pick a form at random
- Leave test contacts behind
- Rerun without deleting first

All Leads vs New Leads Only

What It Is

During connect you choose how far back to sync. This choice decides whether past leads come in or only leads that arrive after you connect.

How It Works For Your Business

- The sync screen appears during the connect flow, after you pick your page.
- All Leads pulls in past leads plus every new one going forward.
- New Leads Only syncs just the leads that arrive after you connect.
- After a backfill, open Contacts and check the Date Added column.
- Date Added may show when the lead came into your account rather than the form date.

All Leads vs New Leads Only - Tips & Guidelines

Tips

- Ask: do I want to contact people who already filled out my form?
- Review workflows that fire on new contacts before choosing All Leads.
- Reconnecting may be needed to see this screen again.
- If unsure, New Leads Only is the safer start.

DO

- Decide before you connect
- Check workflows first
- Open Contacts afterward
- Confirm Date Added on screen

DON'T

- Pick without thinking
- Backfill into a live workflow
- Reconnect a live account casually
- Assume dates match the form

Multiple Pages and Messaging

What It Is

If you run ads for more than one page, you can manage which pages are linked. You can also turn Messenger and Instagram messages on or off for each page.

How It Works For Your Business

- Click the card's three dots and look for Manage Pages.
- Use the search box to find a page, tick pages on or off, and click Update.
- The form mapping list can then show your forms grouped by page.
- Deactivate a form you no longer run so the list stays tidy.
- Look for the settings menu on the card to find Messenger and Instagram toggles per page.

Multiple Pages and Messaging – Tips & Guidelines

Tips

- Only keep pages on that you really run ads for.
- When Messenger is on, look for threads in Conversations.
- Deactivate old forms instead of leaving clutter.
- Check the mapping list after adding a page.

DO

- Search for pages by name
- Tick only the pages you use
- Deactivate retired forms
- Check Conversations after enabling

DON'T

- Link every page you own
- Forget to click Update
- Delete forms you may reuse
- Turn on messages blindly

Workflow from a Facebook Lead

What It Is

The Facebook Lead Form Submitted trigger starts a workflow the moment a lead arrives. It lets you text, notify, and organize leads on autopilot.

How It Works For Your Business

- Search for Workflows and create a new workflow.
- Click Add New Trigger and look in the Events section for Facebook Lead Form Submitted.
- Use the Page and Form filters to choose which leads start the workflow.
- Name the trigger and click Save Trigger.
- Add an action such as Send SMS, then Publish the workflow.

Workflow from a Facebook Lead - Tips & Guidelines

Tips

- Leaving filters empty fires on every form from every page.
- Test with a test lead before you publish.
- Give each workflow a clear name tied to its form.
- Delete test contacts so they do not get messages.

DO

- Set Page and Form filters
- Test before publishing
- Name workflows clearly
- Start with one simple action

DON'T

- Leave filters blank by mistake
- Publish without testing
- Message old backfilled leads
- Stack many actions at first

Troubleshoot and Sync Leads

What It Is

The Troubleshoot panel on the Facebook card helps when leads stop arriving. It can show missing permissions and offers a manual way to pull in leads.

How It Works For Your Business

- Click the card's three dots and look for Troubleshoot.
- Read the list of missing permissions, if any appear.
- Look for a Sync Leads action to pull in leads by hand.
- Fix app permissions in your Facebook settings under Apps and Websites.
- In Facebook's Leads Access settings, confirm your software's app is the primary receiver.

Troubleshoot and Sync Leads – Tips & Guidelines

Tips

- Check Troubleshoot before you reconnect.
- Fix one permission at a time, then retest.
- Leads from Facebook may take a moment to appear.
- Send a test lead after every fix.

DO

- Open Troubleshoot first
- Fix missing permissions
- Check Leads Access settings
- Retest after each fix

DON'T

- Disconnect as a first move
- Ignore the permission list
- Change many settings at once
- Skip the retest

Reconnecting and Conversions API

What It Is

If the card shows a warning, your connection may have expired and needs a reconnect. Lead events can also be sent back to Facebook with the Conversions API action.

How It Works For Your Business

- Look for a warning state on the Facebook card.
- Click Connected, then Disconnect, and then Connect again.
- Keep all previously shared pages selected, then check each form's blue checkmark.
- In a workflow, look for the Meta Conversion API action and choose your connection and lead event.
- Select your pixel, and use a pipeline stage change as the trigger to report qualified leads.

Reconnecting and Conversions API – Tips & Guidelines

Tips

- Reconnect during a quiet time and send a test lead after.
- Recheck every form after reconnecting.
- Use stage changes so Facebook hears only about good leads.
- Confirm action names on screen, since they can change.

DO

- Keep shared pages selected
- Recheck blue checkmarks
- Send a test lead
- Choose the right pixel

DON'T

- Deselect pages on reconnect
- Assume forms stayed mapped
- Send events for every lead
- Skip the test

Key Terms Glossary

Integrations

The page where you connect outside tools.

Facebook Form Field Mapping

The screen that matches form questions to contact fields.

Blue checkmark

Shows a form is mapped and in sync.

Page admin

A person with admin rights on a Facebook page.

Business Manager

Facebook's account for pages and ad accounts.

Standard field

A built-in contact field like First Name or Email.

Custom field

A field you create to store extra information.

All Leads

Sync option that brings in past leads plus new ones.

New Leads Only

Sync option that brings in leads after you connect.

Trigger

The event that starts a workflow.

Lead Ads Testing Tool

Facebook's tool for sending fake leads.

Pixel

A Facebook tracking tool that receives lead events.

Getting Help

Your software and Facebook both change over time, so a button, menu, or screen may look different from what you see here. If something does not match, check the in-app help for Facebook Lead Ads or look for the option with the closest name.