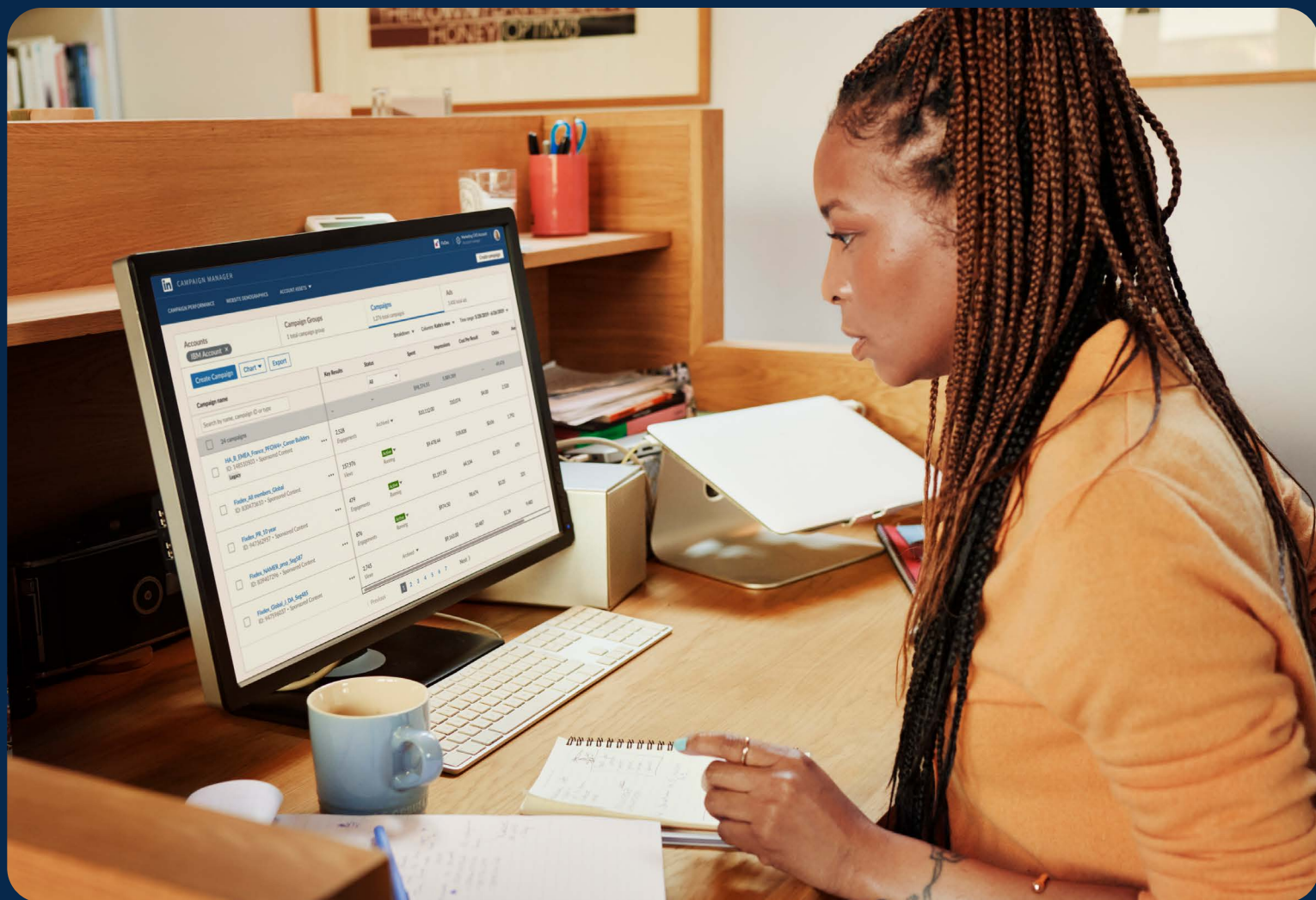


Agency Quick-Start Guide

LinkedIn Business Manager

How to manage client accounts, collaboration, and invoicing — all in one place.



A practical, easy-to-use guide for agencies wanting a clearer, more scalable way to manage LinkedIn activity for their clients.

LinkedIn Ads

Table of Contents:

[Introduction](#)



[01: Simplify Client Management](#)



[02: Unlock Improved Access Control & Transparency](#)



[03: Enhance Collaboration with Clients](#)



[04: Streamlined Billing & Monthly Invoicing](#)



[05: Connect Marketing to Revenue Impact](#)



[06: Keep the Pace with Agency Competition](#)



[07: Quick Start Checklist](#)



[08: FAQs](#)



[09: Resources & Links](#)



Introduction: Why This Guide is Important for Agencies

Agencies move fast — new clients, shifting teams, growing portfolios. Yet that momentum can be slowed down by one thing: administrative work. Managing access, sharing ad accounts, coordinating billing, requesting approvals... it adds up quickly.



Business Manager brings order to that complexity. It centralizes the assets you work with every day, creates cleaner workflows, and helps agencies collaborate with clients without the usual friction.

In this guide, you'll learn:

- ✓ What Business Manager is and how it fits into your agency workflow
- ✓ Why Business Manager matters for agencies managing multiple clients, accounts, and stakeholders
- ✓ How to get set up quickly and start working more efficiently

Whether you're managing three client accounts or thirty, this is your starting point for a smoother, more scalable LinkedIn Ads setup.

Section 1: Simplify Client Management with Business Manager

When you manage multiple clients, simply knowing who has access to what can become a full-time job. Business Manager removes that uncertainty by giving you one centralized hub for everything you manage on LinkedIn Ads.

Instead of juggling logins, email approvals, and tracking access to old accounts, everything is consolidated in Business Manager.

This means:



Fewer bottlenecks



Fewer errors



**A more consistent,
professional experience
for your clients**

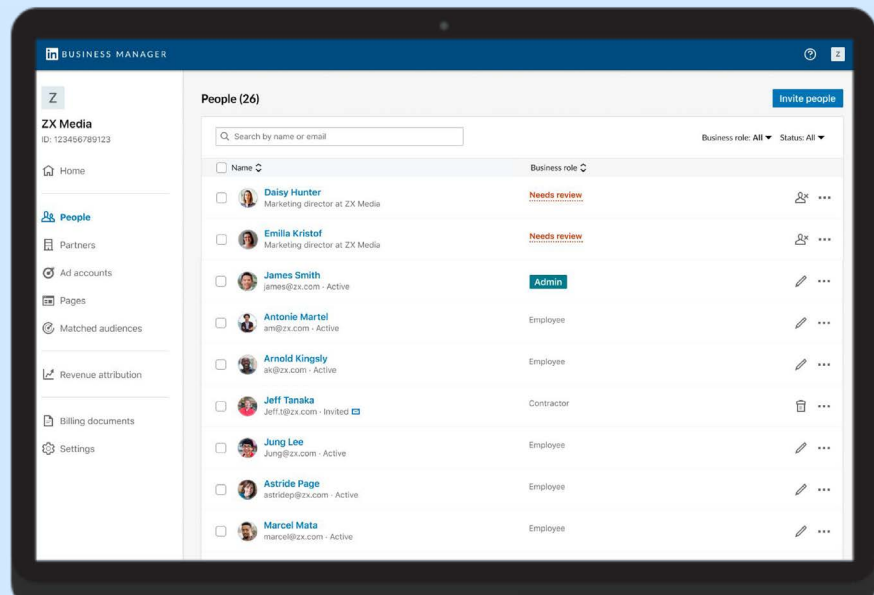
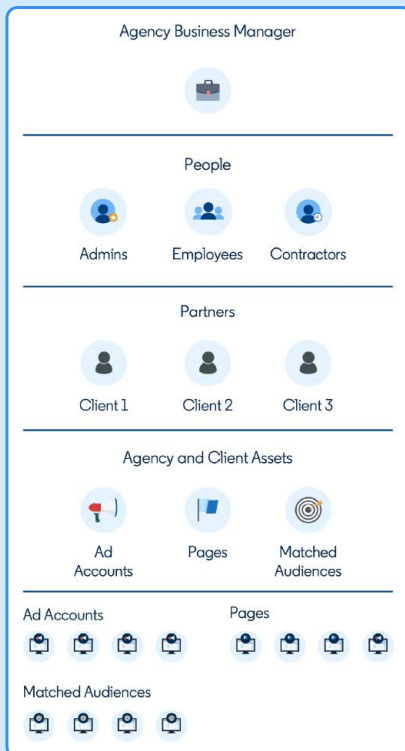
With Business Manager, agencies can spend more time delivering value to clients and less time on administrative work.

What you can centralize in Business Manager

Business Manager connects all the key components you need to run LinkedIn Ads campaigns efficiently. From a single dashboard, you can manage:

- ✓ **Ad Accounts**
Where your campaigns live
- ✓ **Client Pages**
The foundation for Sponsored Content and your client's presence on LinkedIn
- ✓ **People & Permissions**
Fast, controlled access management
- ✓ **Matched Audiences**
Consistent targeting across accounts
- ✓ **Invoicing**
A unified place to manage billing operations
- ✓ **Revenue Attribution Report**
Demonstrate how your marketing efforts are influencing revenue for your client's business

By bringing these elements into one structured ecosystem, Business Manager gives your agency the visibility, consistency, and control needed to scale effectively.

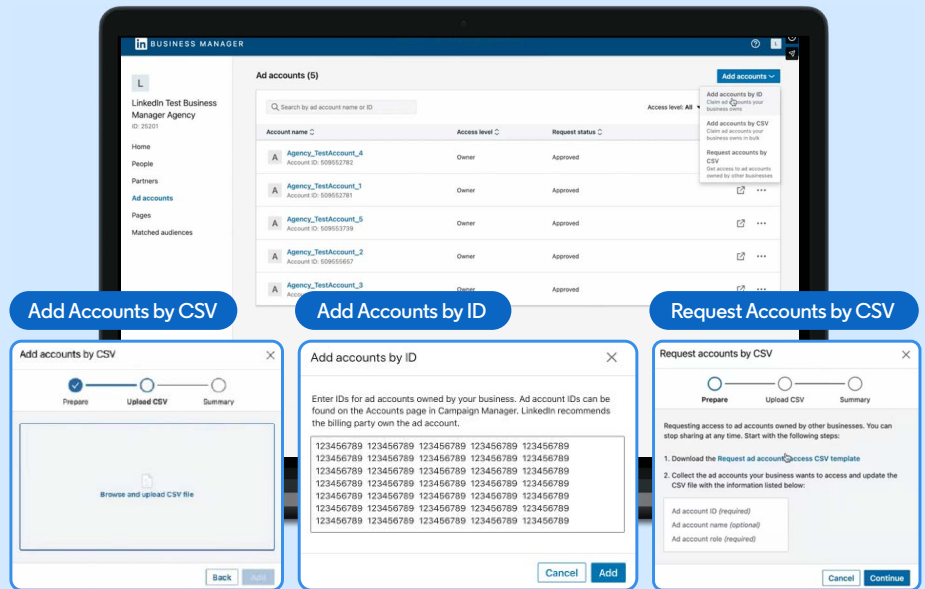


Setting up your Ad Account & Pages

Once your Business Manager is set up, the first step is simply adding the assets your agency works with.

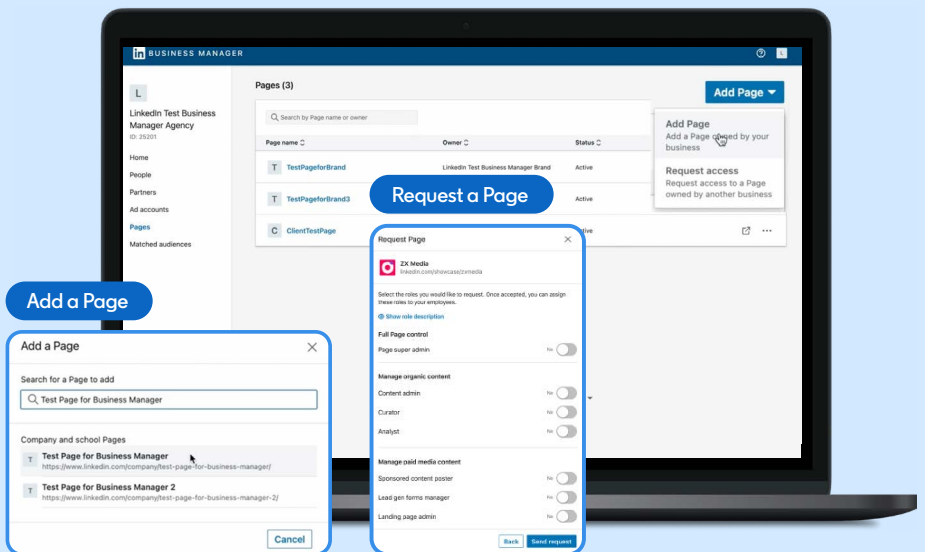
Adding Ad Accounts

- 1 You can add accounts individually or upload a CSV if you manage them in bulk
- 2 Business Manager will automatically request approval from the current Account Managers where needed
- 3 Once approved, your team can begin assigning roles and accessing the account through Business Manager



Adding Pages

- 1 Pages can be added by searching for the Page name or by requesting access from the Page's Super Admin
- 2 After approval, the Page becomes available in your Business Manager, ready for your team to manage



These initial steps lay the groundwork for a cleaner, more organized setup moving forward.

Section 2: Unlock Improved Access Control & Transparency

As teams evolve and grow — new hires, freelancers, client-side collaborators — access can quickly become outdated.

Business Manager offers a structured way to manage this, so you always know:



Who has access



What level of access
they have



How to update or
remove access/
permissions in seconds

Clean governance isn't just operationally streamlined — it also reinforces professionalism and trust with your clients.

Permissions model overview

Business Manager uses a clear, intuitive permissions model that allows agencies to stay organized without overcomplicating things.



Admins manage everything — people, assets, and partnerships



Employees can only access the specific Ad Accounts or Pages they're assigned

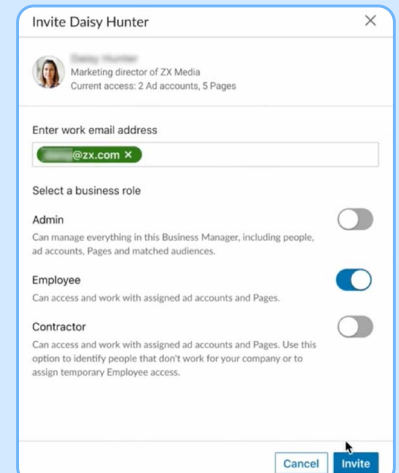
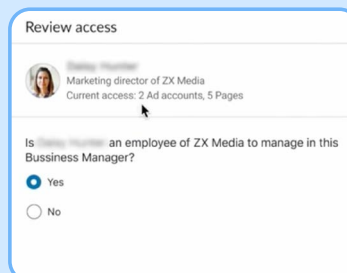


Contractors receive limited, scoped access, ideal for external partners or short-term support

This framework helps you scale your team's access in a way that's both safe and productive.

Managing access in a click

Once your agency is set up, Business Manager becomes your central hub for maintaining access. You can add or remove people instantly, resolve “Needs Review” items from previous setups, and regularly audit your access landscape.



These controls help keep your client accounts secure and ensures that only the right people are working on the right assets.

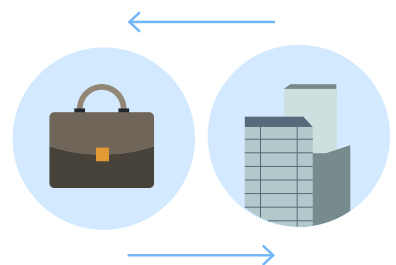
Section 3: Enhance Collaboration with Clients

Agencies and clients often share responsibility for accounts — sometimes even across multiple partners. Business Manager simplifies this collaboration by giving both sides a shared structure to work within.

Clients retain visibility and control over their assets, while agencies are able to onboard their own team members without requiring repeated approvals.

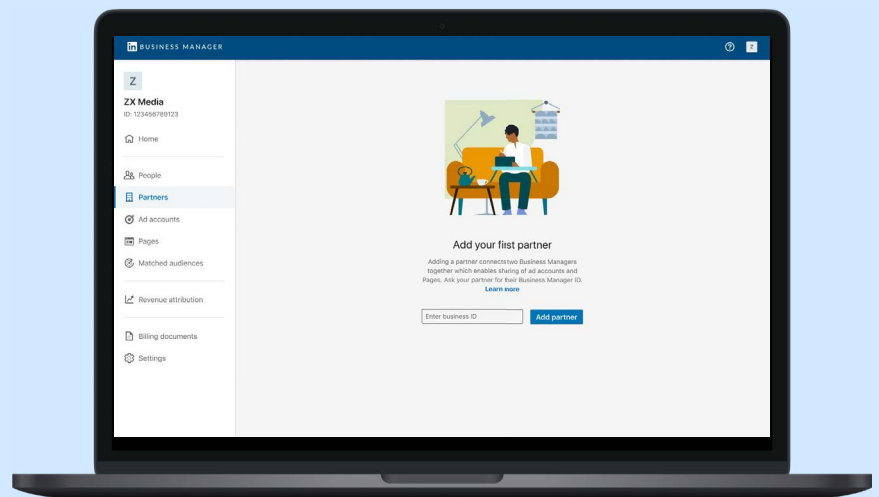
The result is less back-and-forth, more transparency, and smoother day-to-day collaboration.

As your client roster grows, these efficiencies compound and make collaboration easier to manage and scale.



Business Manager Partnerships

- ✓ Partnerships formalize collaboration between your Business Manager and your client's Business Manager. They allow Ad Accounts and Pages to be shared securely.
- ✓ Partnerships make it clear who owns what, what has been shared, and who can adjust permissions. Clients benefit from simplicity and oversight, while agencies gain flexibility and control.

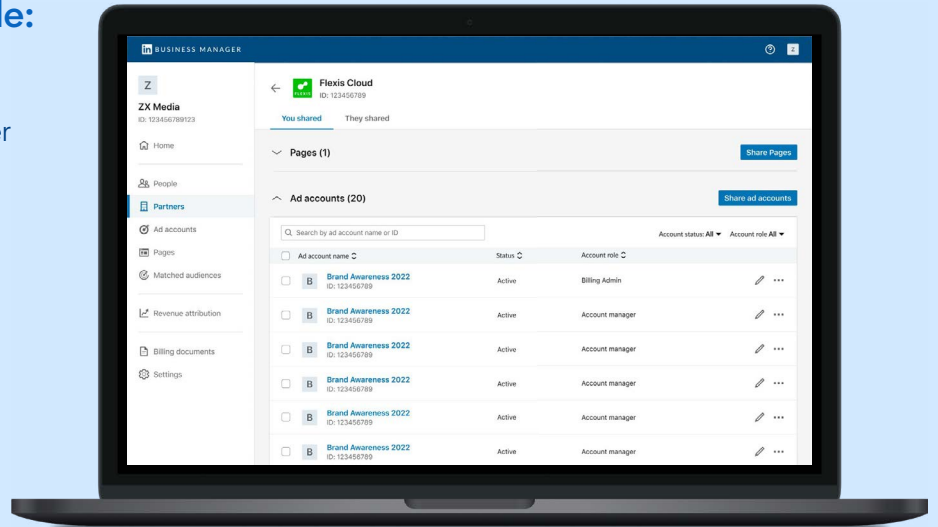


Setting up a Partnership

Setting up a Partnership is simple:

- 1 If both sides use Business Manager, you can exchange Business Manager IDs and an Admin connects the two.
- 2 Once connected, Ad Accounts and Pages can be shared instantly.

If your client doesn't yet use Business Manager, you can still request access the traditional way and proceed as normal.



Partnerships streamline collaboration and reduce reliance on email chains or manual approvals.



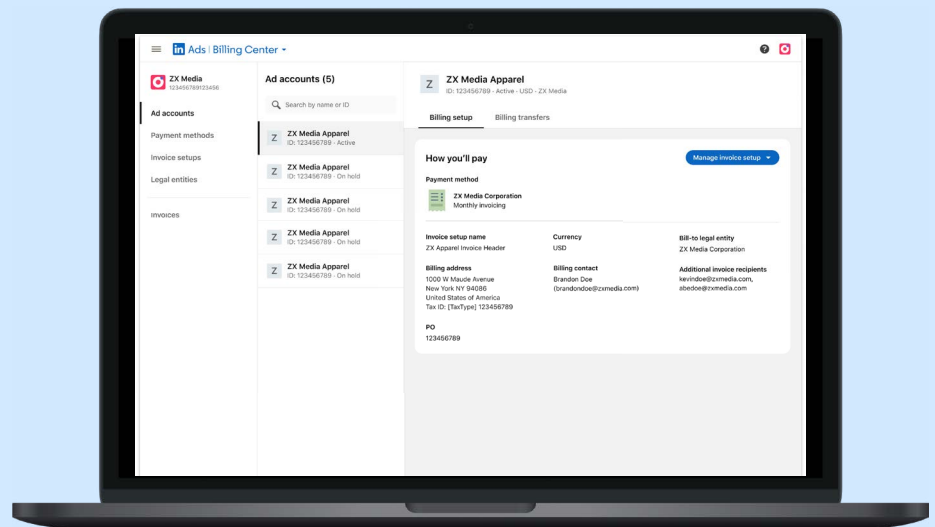
Section 4: Streamlined Billing & Monthly Invoicing

Billing doesn't need to be complex.

Business Manager centralizes invoicing so agencies can manage billing for multiple accounts more consistently and effectively.

This means you can:

- Set up invoicing for new accounts faster
- Switch accounts to monthly invoicing without submitting tickets
- Edit invoice recipients or PO numbers directly
- Track all invoices from a single dashboard

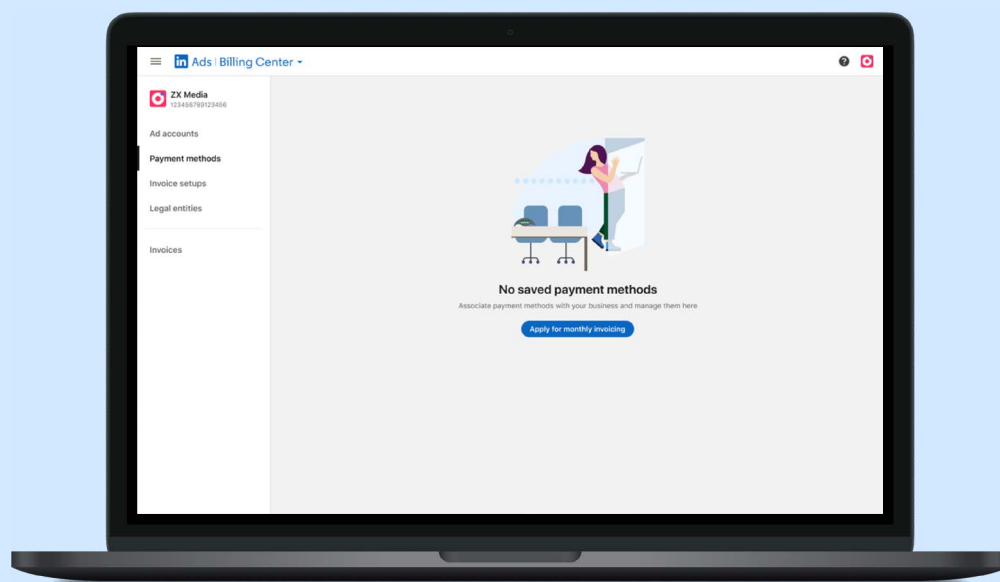


For many agencies, this feature alone simplifies workflows dramatically.

Key concepts

Understanding a few important terms help agencies navigate LinkedIn's invoicing structure more confidently:

- ✓ **Monthly Invoicing Eligibility**
Determines whether your agency or client can apply
- ✓ **Legal Entity**
The business legally responsible for payments
- ✓ **Payment Method Sharing**
Required for sequential liability models
- ✓ **Invoice Setups**
Define how each ad account is billed

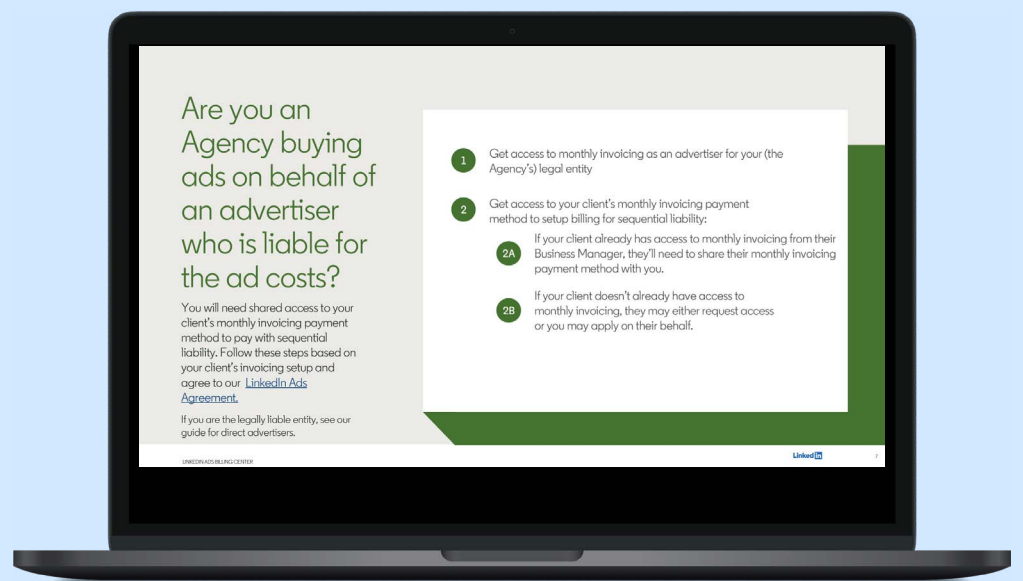


Having clarity on these concepts helps ensure a smoother setup and reduces the likelihood of billing issues over time.

Agency billing models

Agencies typically work within one of three common billing structures:

- ✓ **Agency pays on behalf of the client**
Ideal when billing is bundled or centralized.
- ✓ **Client pays directly**
Preferred when clients manage their own financial processes.
- ✓ **Sequential liability**
The client is legally liable, but the agency manages setup using the client's shared payment method.



Choosing the right model depends on how your agency and clients prefer to collaborate and manage financial responsibility.

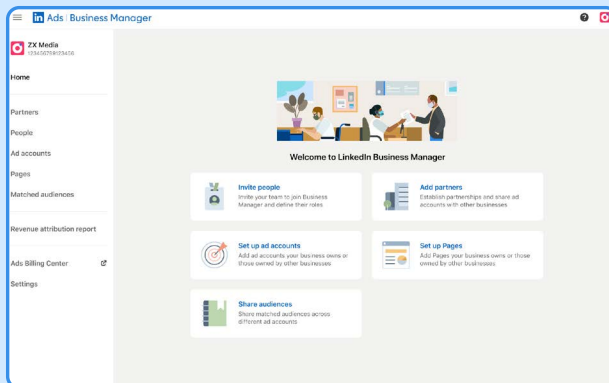
Step-by-step invoicing setup

Below is a streamlined overview of the steps you'll take when setting up invoicing in Business Manager.

1 Apply for Monthly Invoicing

If eligible, you can apply directly within the Ads Billing Center

A Log in to Business Manager



D Complete application

Submit this application for

- My business**
Get access to your monthly invoicing payment method and legal entity
- My client's business**
Get access to your client's monthly invoicing payment method

E Create your Legal Entity

Apply for monthly invoicing

Monthly invoicing is a payment method that reduces the number of transactions by consolidating your ads costs into monthly invoices.

Submit this application for

- My business**
Get access to your monthly invoicing payment method and legal entity
- My client's business**
Get access to your client's monthly invoicing payment method

Business information

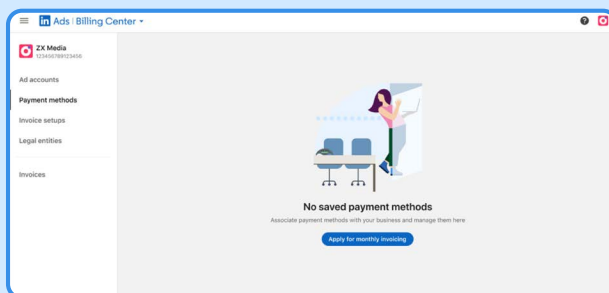
Registered legal company name

Enter your company name exactly as it appears on legal documents. Exclude name

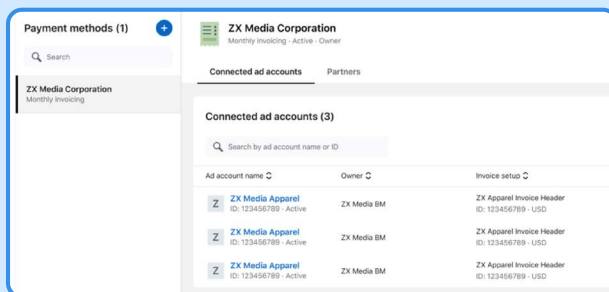
Country/Region

Address line 1

B Apply for monthly invoicing



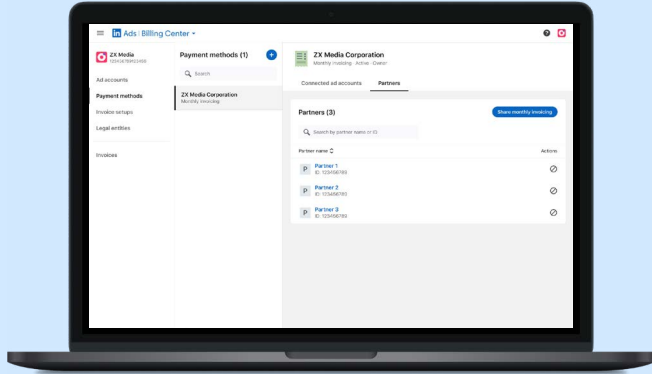
C New payment method



2 Gain Access to Client Payment Methods

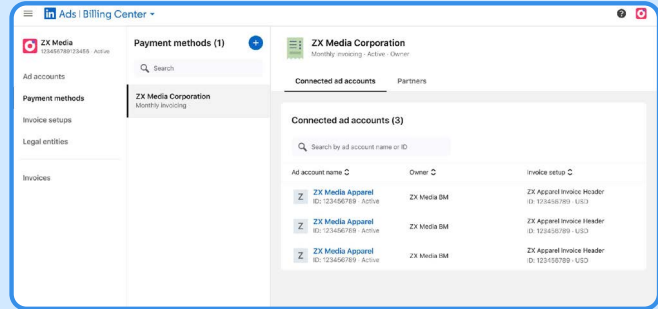
Clients either share an existing payment method or you apply on their behalf

A Partners tab + share monthly invoicing

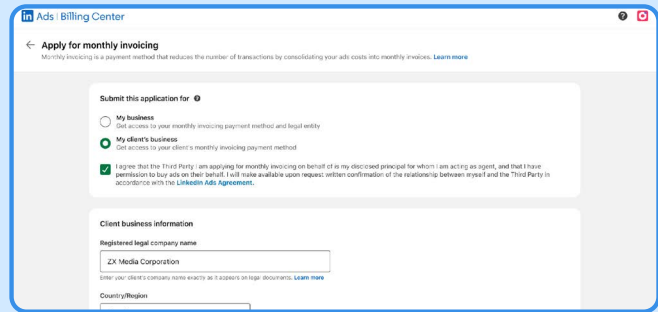


If the client doesn't already have access.

B Payment methods tab + add monthly invoicing



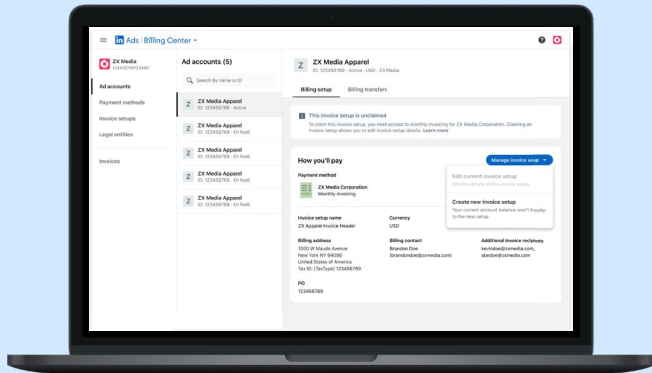
C Monthly invoicing application



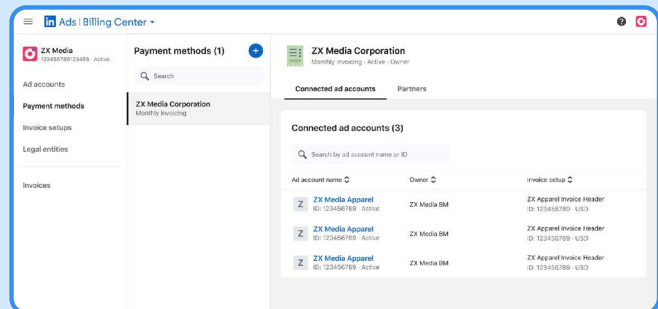
3 Claim Invoice Setups

Ensure you have access to the relevant legal entity and payment method

A Unclaimed invoice setup



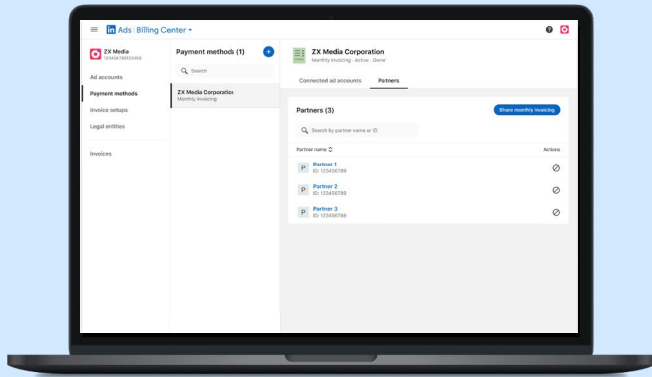
B Invoice setup claimed



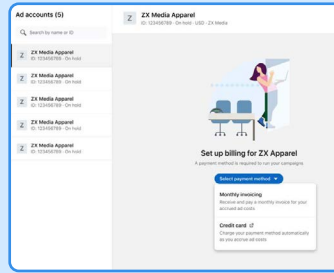
4 Activate New Ad Accounts

Assign the correct legal entity and payment method.

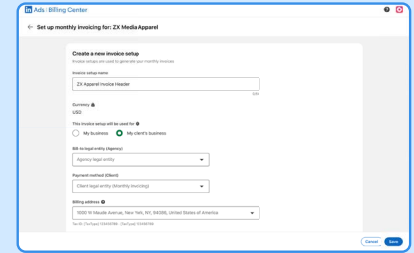
A Access to your client's accounts



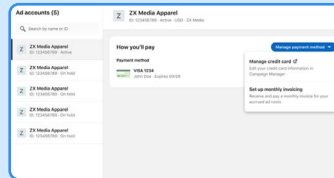
B Setup your new Ad Accounts



D Create an invoice setup



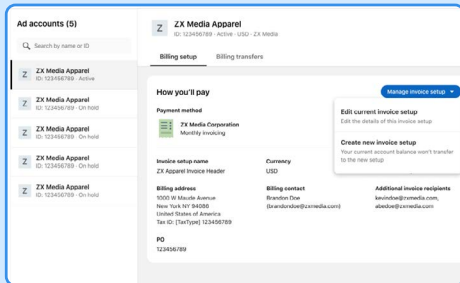
C Setup monthly invoicing



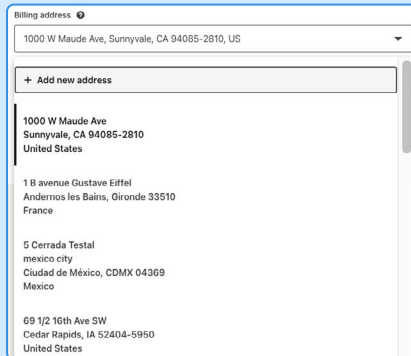
5 Edit or Update Setups

Adjust recipients, PO numbers, or create new setups if needed.

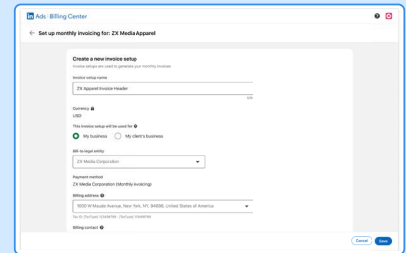
A Select the Ad Account you wish to change



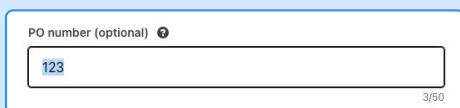
C Change your billing address



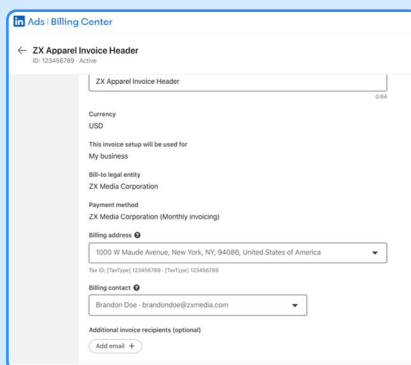
E Create a new invoice setup



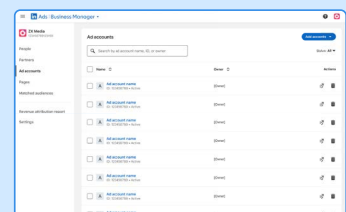
B Edit PO#s



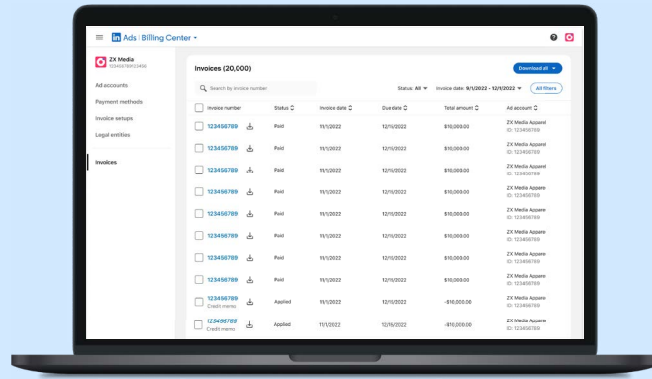
D Edit your invoice setup



F Remove invoice account



- 6 Download Invoices
Use the Invoice Dashboard for sorting, filtering, and exporting.



Section 5: Connect Marketing to Revenue Impact



Agencies often need to demonstrate how marketing efforts contribute to real business outcomes.

Within Business Manager, the Revenue Attribution Report connects LinkedIn Ads activity to **CRM** data—such as pipeline and revenue—so agencies can understand how campaigns influence opportunities across the funnel.

This visibility helps agencies align with clients on performance, justify investment with revenue-based metrics, and create a shared view of marketing's impact.

Section 6: Keep the Pace with Agency Competition

Most agencies already use Business Manager or similar tools across platforms.

By adopting it, your agency demonstrates operational maturity, security awareness, and a modern approach to client collaboration.

Clients notice and, increasingly, expect it.

Business Manager becomes part of your service foundation — not a nice-to-have, but a marker of professionalism.



Section 7:

Quick Start Checklist

A simple reference to get your agency set up quickly:

- ✓ Create your Business Manager
- ✓ Invite Admins and Employees
- ✓ Add Ad Accounts and Pages
- ✓ Review access and resolve “Needs Review” items
- ✓ Set up Partnerships with clients
- ✓ Configure invoicing (if needed)
- ✓ Regularly review permissions
- ✓ Establish naming and governance conventions

Section 8:

FAQs

- ➔ **Do clients need their own Business Manager?**
Not always, but recommended for teams working across multiple agencies or internal departments
- ➔ **What happens if a client relationship ends?**
Either party can remove access. Agencies can remove Ad Accounts; clients can revoke shared permissions
- ➔ **Who should own the Ad Account?**
LinkedIn recommends that the party responsible for billing owns the account
- ➔ **What if a client doesn't want Business Manager?**
You can still request access manually — the workflow is simply slower
- ➔ **What if an invoice setup is unclaimed?**
You may need access to the legal entity and payment method used

Section 9: Resources & Links

To learn more or continue onboarding:

- Business Manager Overview
- Monthly Invoicing Getting Started Guide
- Helpful CSV templates
- Account & Page ownership explainer
- Audience sharing overview
- LinkedIn Help Center
- NEW: Marketing Academy — Advanced Campaign Tools (Business Manager Course)

