



Agency Monthly Invoicing Getting Started Guide

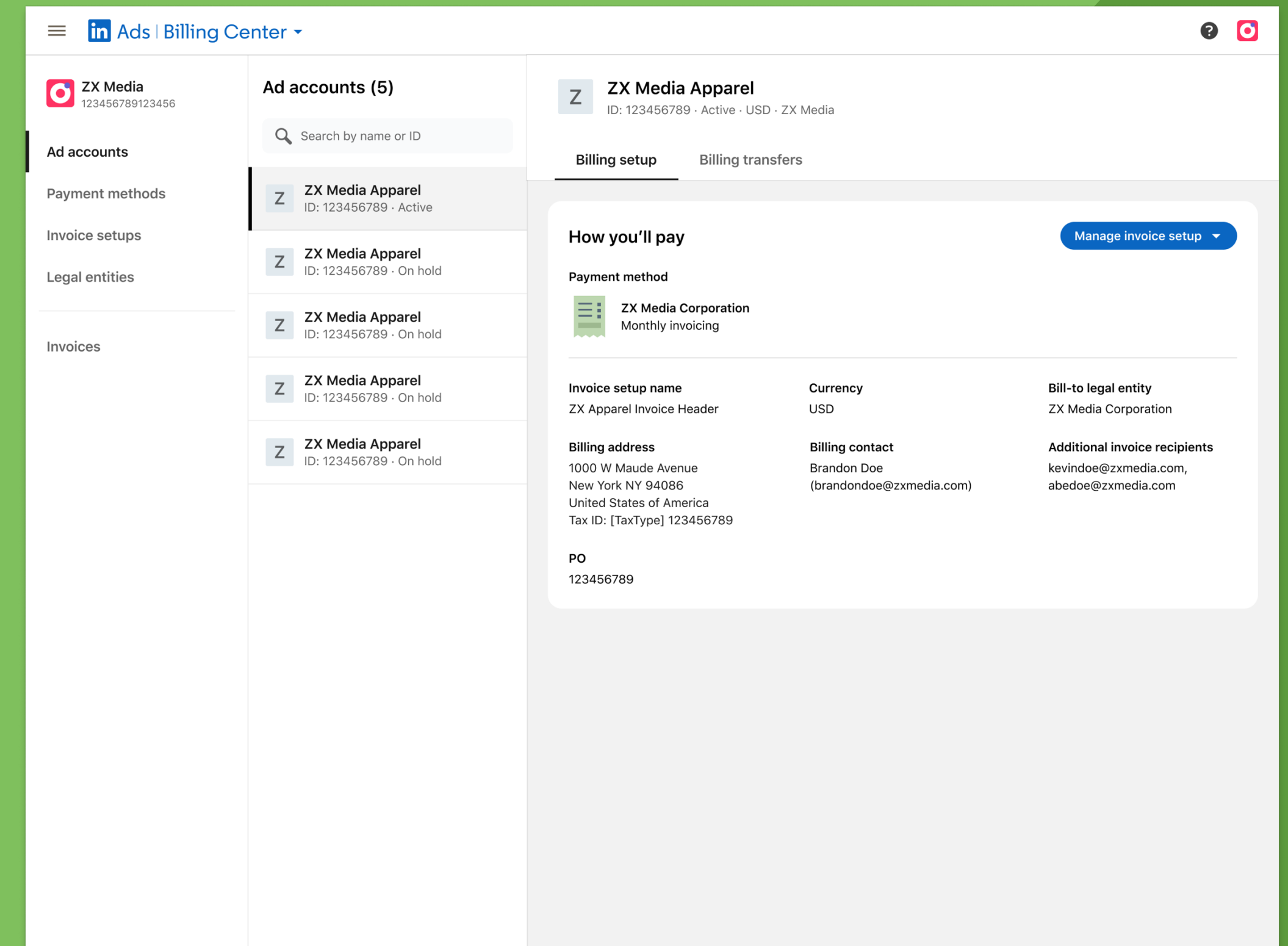
Introducing our New Self Serve
Invoicing Experience



New! Monthly Invoicing Made Simple

Control all aspects of your invoicing experience, from applying for monthly invoicing to editing invoice setups in a single place.

- **Reduce setup time:** Instantly activate new ad accounts for invoicing in your Business Manager.
- **Ensure invoices contain the details you need:** directly edit invoice setups, including changes to invoice recipients and PO#s without filing a support ticket.
- **Save time reconciling LinkedIn marketing expenses:** use the invoice dashboard to view, sort, filter, and download invoices or generate billing reports.



Streamline your LinkedIn Billing experience

Follow these steps to set up invoicing and make changes to your billing details.

- 1 Setting up your Business Manager
- 2 Getting started Business Manager Invoicing
- 3 Claiming your Invoice Setups
- 4 Set up new ad accounts for monthly invoicing
- 5 Change your billing details
- 6 Downloading your Invoices
- 7 FAQ & Troubleshooting

1.

Setting up your Business Manager

If you already have Business
Manager, skip to [slide 6!](#) ➔



How does Business Manager work?

Don't worry!

Getting started with Business Manager won't disrupt your ongoing ad campaigns or data integrations.

Learn more about Business Manager [here](#).

- 1 Invite your Admins to Business Manager using their work emails.
- 2 Add the Ad Accounts and Pages your business owns.
- 3 Get access to the Ad Accounts and Pages of other businesses you work with by setting up a Business Manager Partnership.
- 4 Invite the rest of your team to Business Manager using their work emails.
- 5 Use Business Manager to adjust Ad Account and Page permissions quickly if needed.

2.

Getting started with self-serve invoicing in Business Manager



Are you an Agency managing billing for your client?

You will need shared access to your client's monthly invoicing payment method. Follow these steps based on your client's invoicing setup.

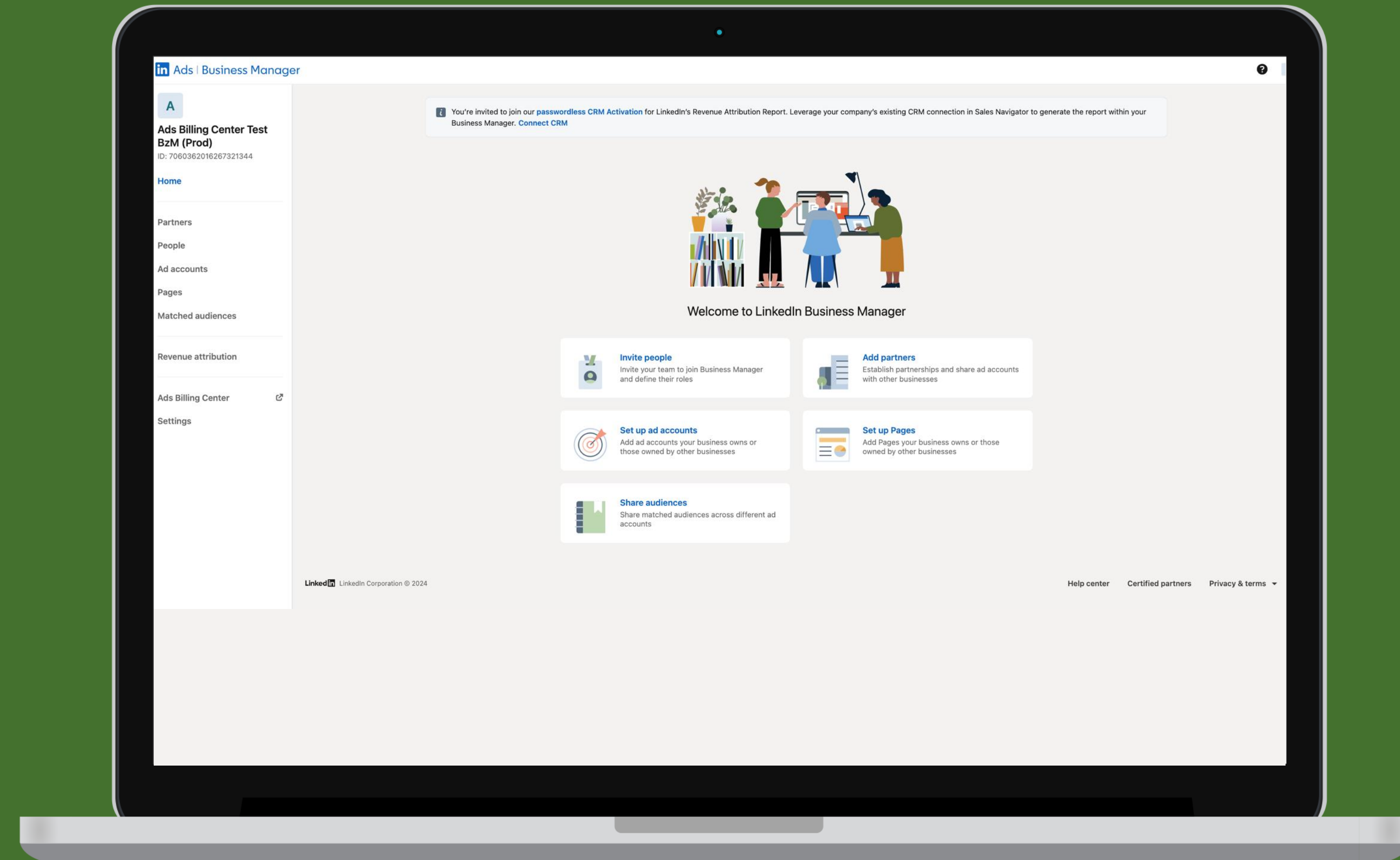
- 1 Get access to monthly invoicing as an advertiser for your (the Agency's) legal entity
- 2 Get access to your client's monthly invoicing payment method:
 - 2A If your client already has access to monthly invoicing from their Business Manager, they'll need to share their monthly invoicing payment method with you.
 - 2B If your client doesn't already have access to monthly invoicing, they may either request access or you may apply on their behalf.

STEP 1:

Navigate to the Ads Billing Center

Log in to Business Manager

- Ensure you have Business Manager Admin permissions
- Select "Ads Billing Center" on the left-hand side of your screen

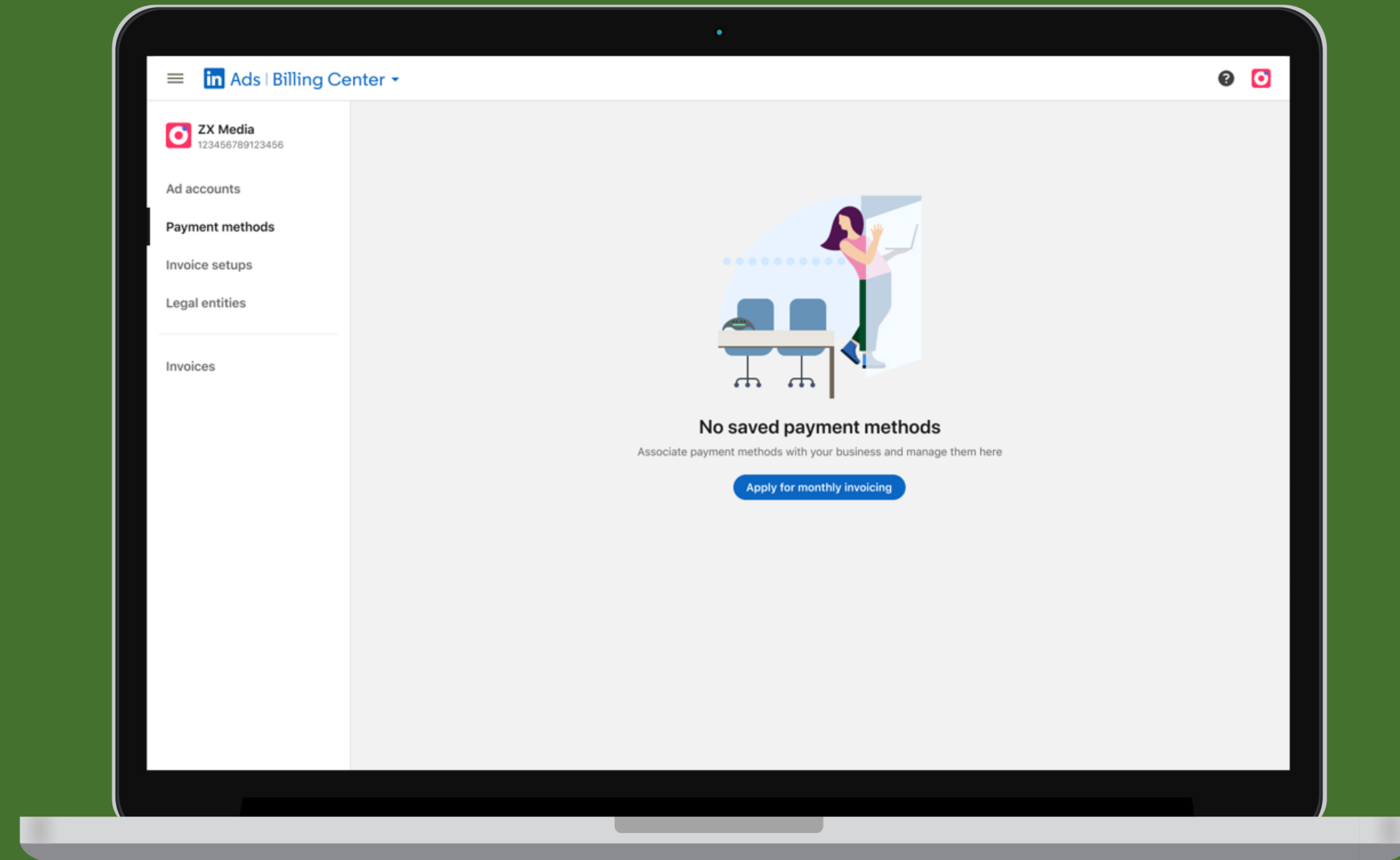


STEP 2:

Ensure you're Qualified for Monthly Invoicing

Are you able to apply for invoicing?

- Already have accounts on monthly invoicing? If so, you're prequalified! You will see a button to apply for monthly invoicing directly in the Ads Billing Center.
- New to monthly invoicing? You must meet the following criteria to apply:
 - Spend \$3000 per month with LinkedIn Ads for at least 2 consecutive months during the last year
- Contact [LinkedIn Support](#) or your LinkedIn Sales Representative to gain access to the Monthly Invoicing Application in the Ads Billing Center. Include your Business Manager name and ID in your request.
- Note: you must have created a Business Manager *before* August 20th in order to pre-qualify for monthly invoicing

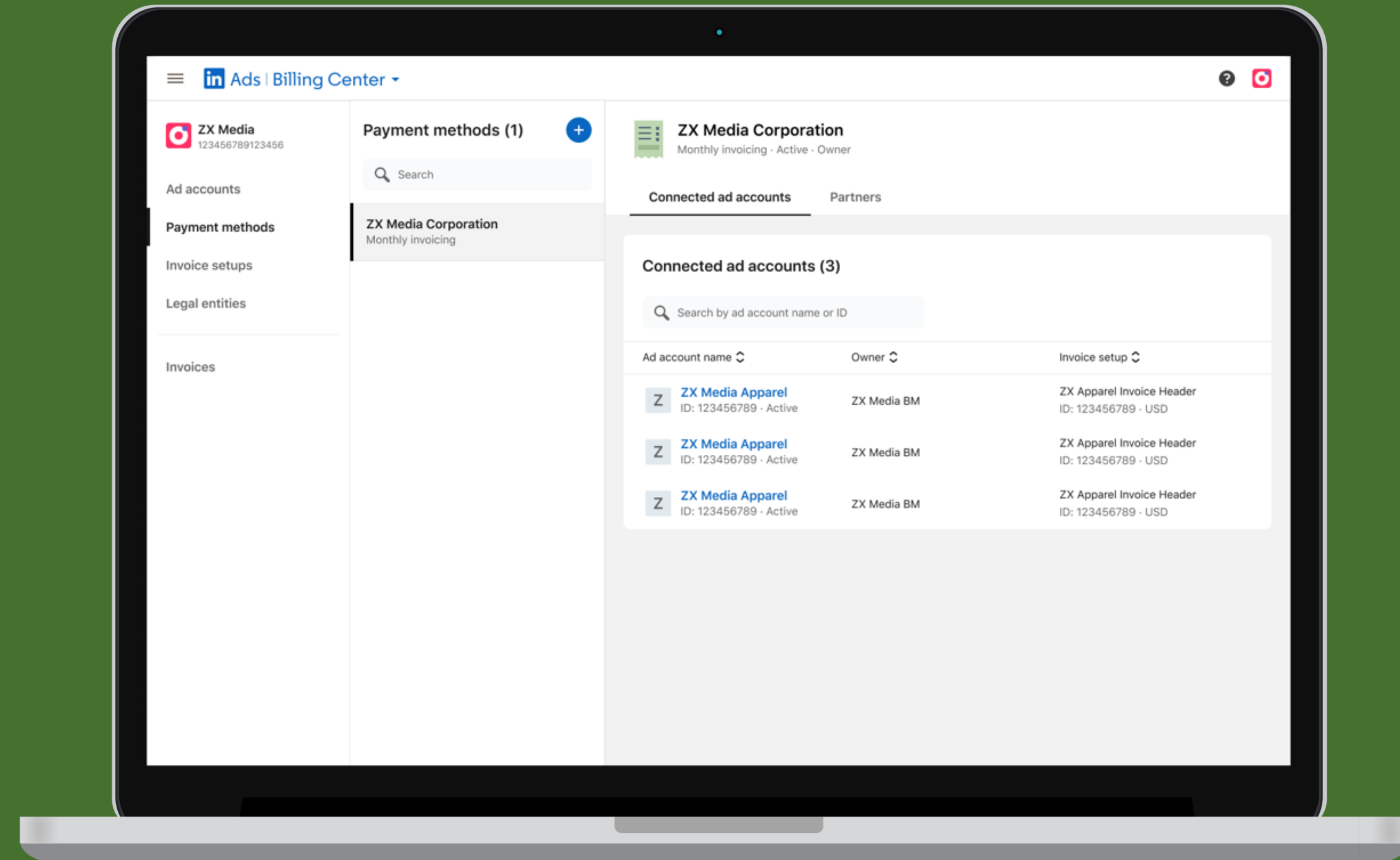


Tip: All customers must complete an invoicing application in order to make changes to their invoice setups, regardless of current invoicing status.

STEP 3:

Apply for a new monthly invoicing payment method

- Navigate to the “Payment Methods” tab on the lefthand side of your screen
- Select a the ”plus” icon next to ”Payment Methods”
- If this is your first monthly invoicing payment method, you will see a button encouraging you to “Apply for Monthly Invoicing” in the middle of the screen.

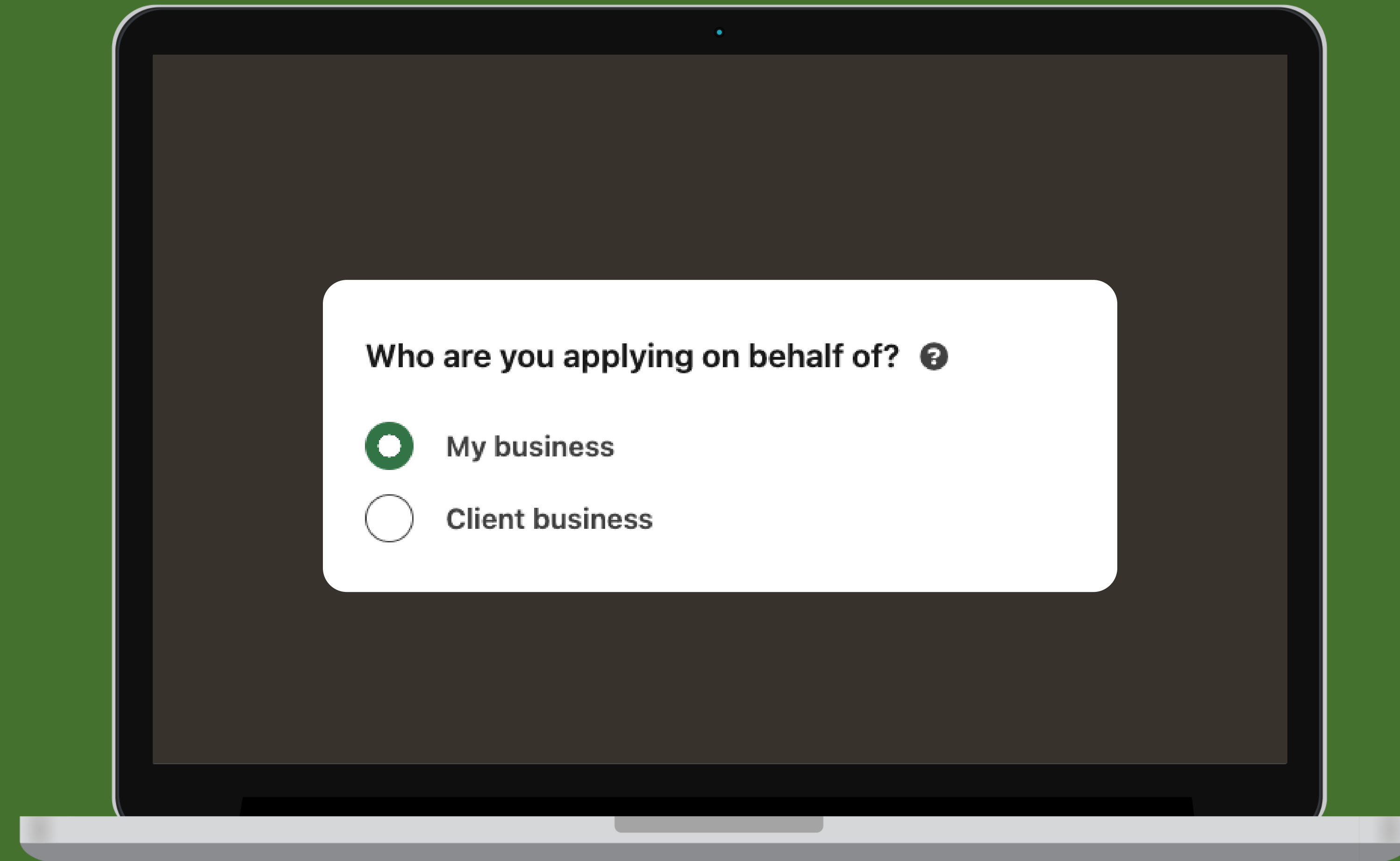


STEP 4:

Complete a Monthly Invoicing Application

Apply on behalf of your business and create your Legal Entity

- If you are an agency and will receive and pay monthly invoices on your client's behalf, you'll first need ownership of your own monthly invoicing payment method.
- Select "My Business" and complete the monthly invoicing application as an Advertiser for your own (the agency's) legal entity

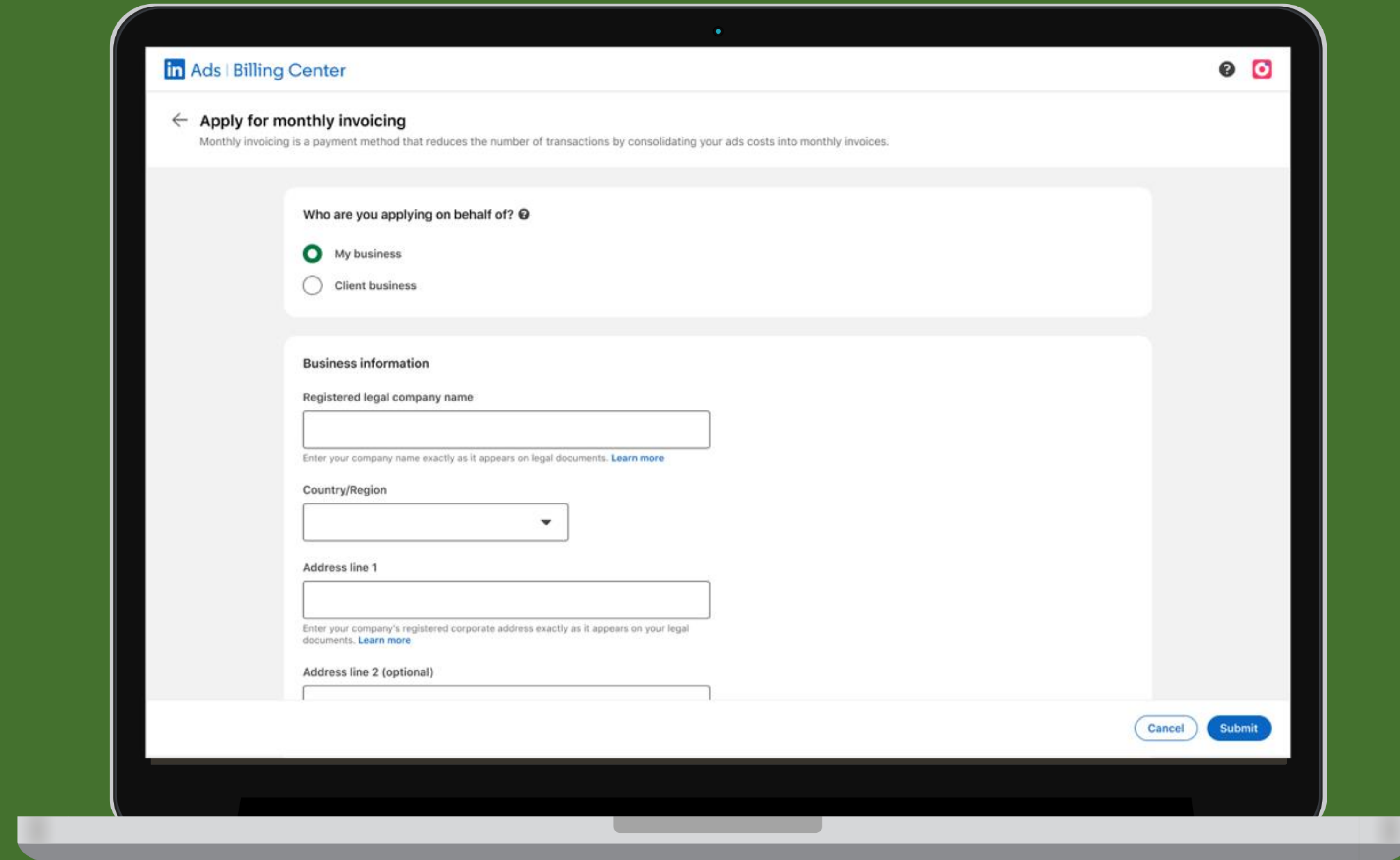


STEP 5:

Complete a Monthly Invoicing Application

Apply on behalf of your business and create your Legal Entity

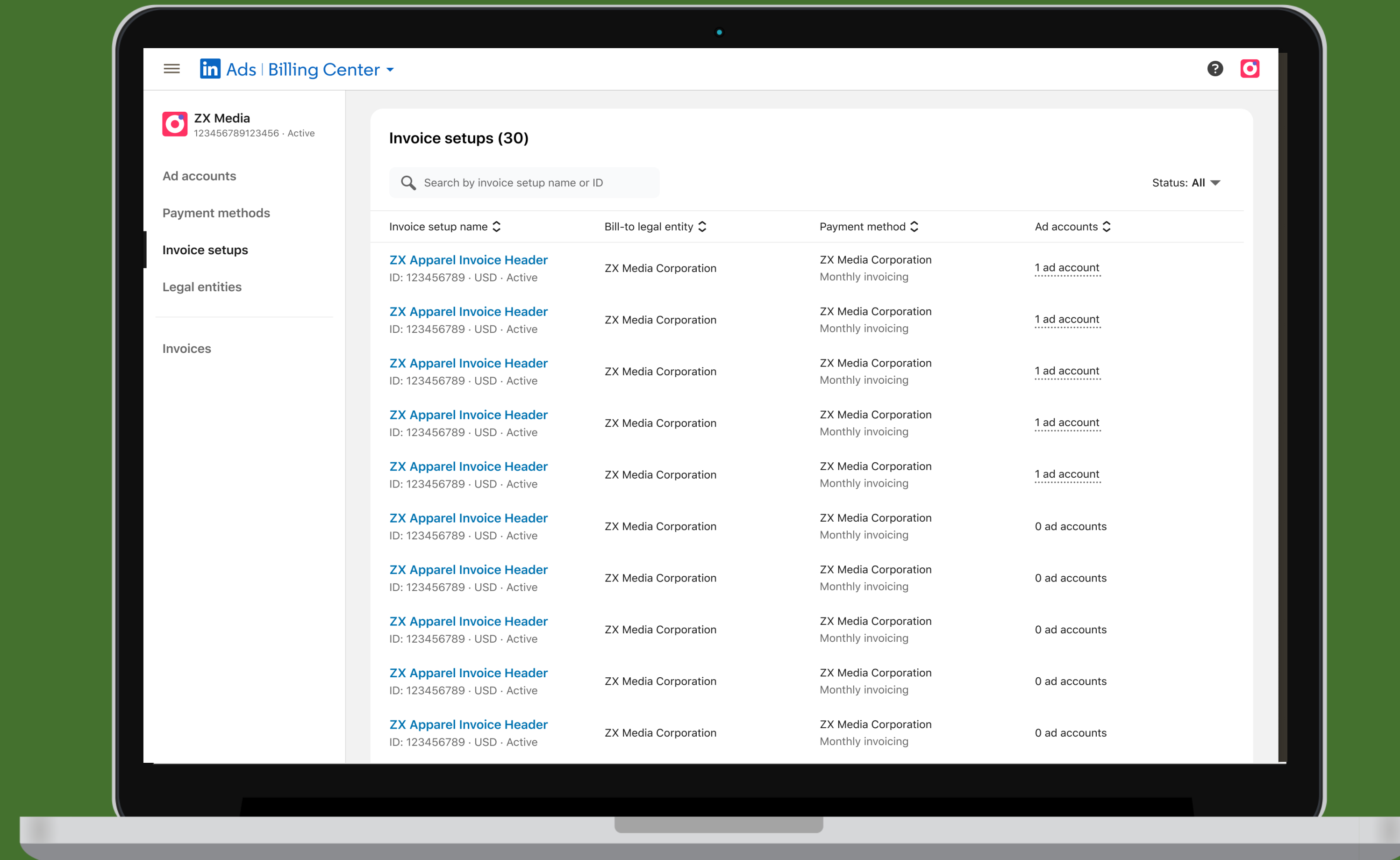
- Complete the application form and follow the prompts
- Be sure the information you include such as Company Name and Address appear exactly as they do on legal documents.
- Once you submit your application, you will receive a confirmation email. You will be able to view the status of your request on the payment methods tab in the new Ads Billing Center. Your request may take a few days to process.

A screenshot of a laptop displaying the LinkedIn Ads Billing Center interface. The page title is 'Apply for monthly invoicing' with a back arrow icon. Below the title is a descriptive sentence: 'Monthly invoicing is a payment method that reduces the number of transactions by consolidating your ads costs into monthly invoices.' The form is divided into two main sections. The first section, 'Who are you applying on behalf of?', has two radio button options: 'My business' (which is selected) and 'Client business'. The second section, 'Business information', contains four input fields: 'Registered legal company name' (with a text prompt below it: 'Enter your company name exactly as it appears on legal documents. Learn more'), 'Country/Region' (a dropdown menu), 'Address line 1' (with a text prompt below it: 'Enter your company's registered corporate address exactly as it appears on your legal documents. Learn more'), and 'Address line 2 (optional)'. At the bottom right of the form are 'Cancel' and 'Submit' buttons.

Tip: If you have questions about the application, review our glossary [here](#).

I've been approved for monthly invoicing! Now what?

- Once you've been approved for monthly invoicing, you will receive an email confirming your approval.
- Invoice setups will be automatically created for Ad accounts owned by your Business Manager that have the same bill-to legal entity you used in your application.
- You can also start setting up any newly created Ad accounts for monthly invoicing using this legal entity.
- Some Ad accounts will not have invoice setups automatically created if you do not own the ad accounts or share them with another Business Manager at the billing admin level, or if you do not have access to the bill-to payment method. You will need to claim those setups.



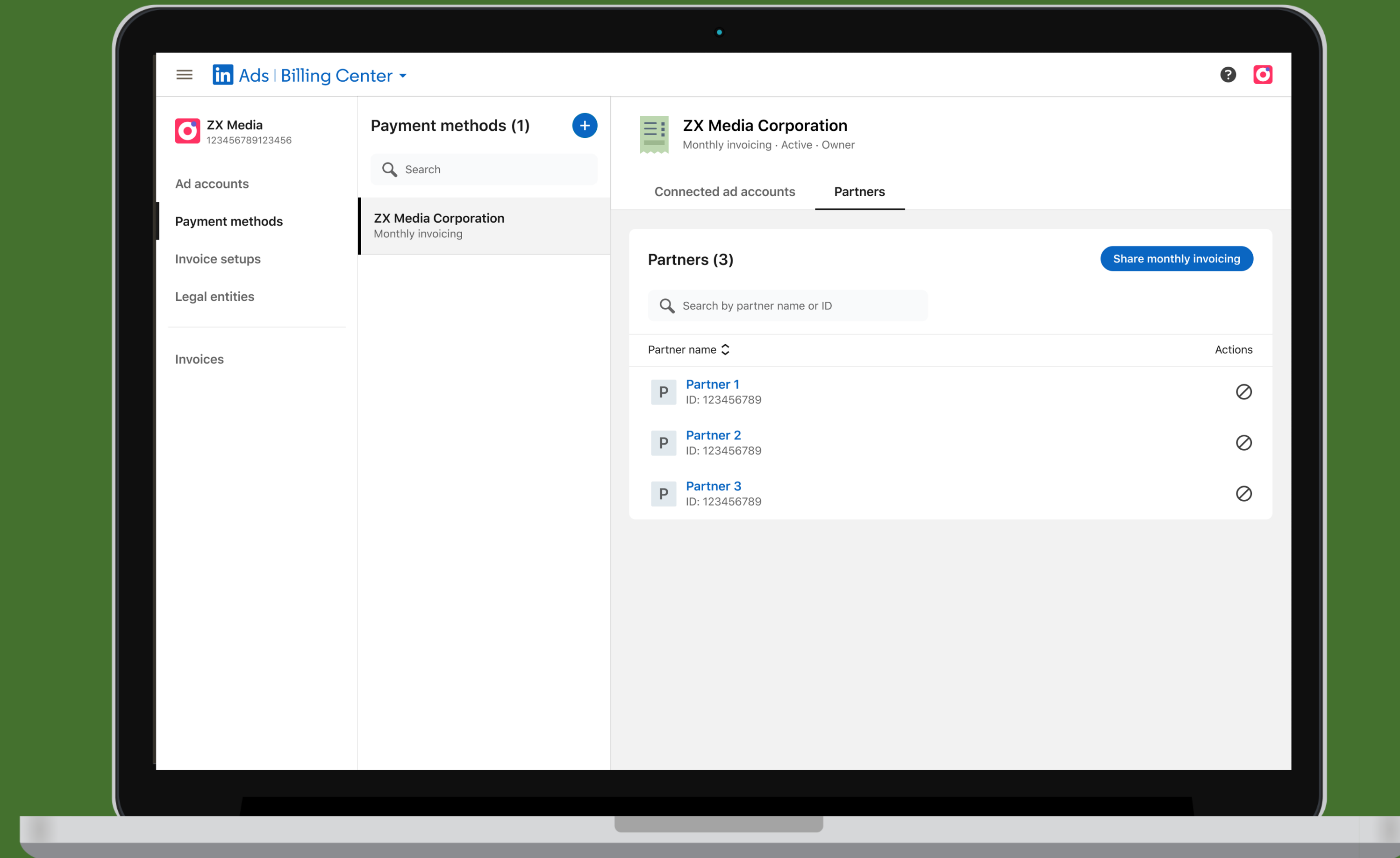
Tip: If you are an Agency managing billing for your client, you will now need to get access to your client's monthly invoicing payment method. Follow steps 6-7 to get set up!

STEP 6A:

Get access to your client's monthly invoicing payment method.

If your client already has access to monthly invoicing they'll need to share their monthly invoicing payment method with you in Business Manager.

- To help your client share their payment method first add your client as a partner in Business Manager
- Then have your client head to the "Payment methods tab" and click the payment method they need to share
- Next, have them click the "Partners" tab and click "Share monthly invoicing"
- Have them select you as the partner to share their payment method with and click "Share"

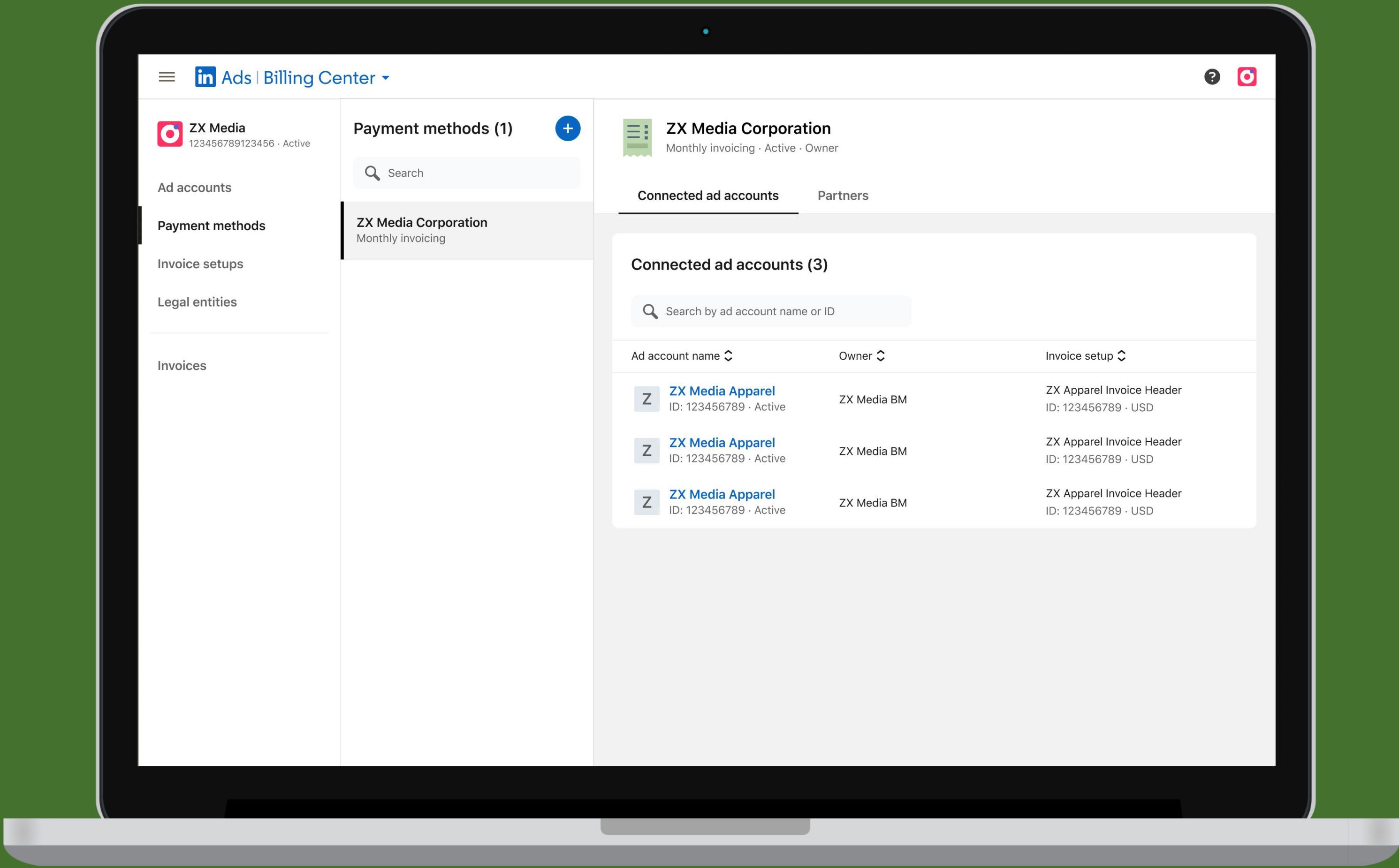


STEP 6B:

Get access to your client’s monthly invoicing payment method.

If your client does not already have access to monthly invoicing , you may apply for access to monthly invoicing on their behalf.

- To do so, first navigate to the “Payment methods” tab on the lefthand side of your screen
- Select the “plus” icon next to “Payment methods”

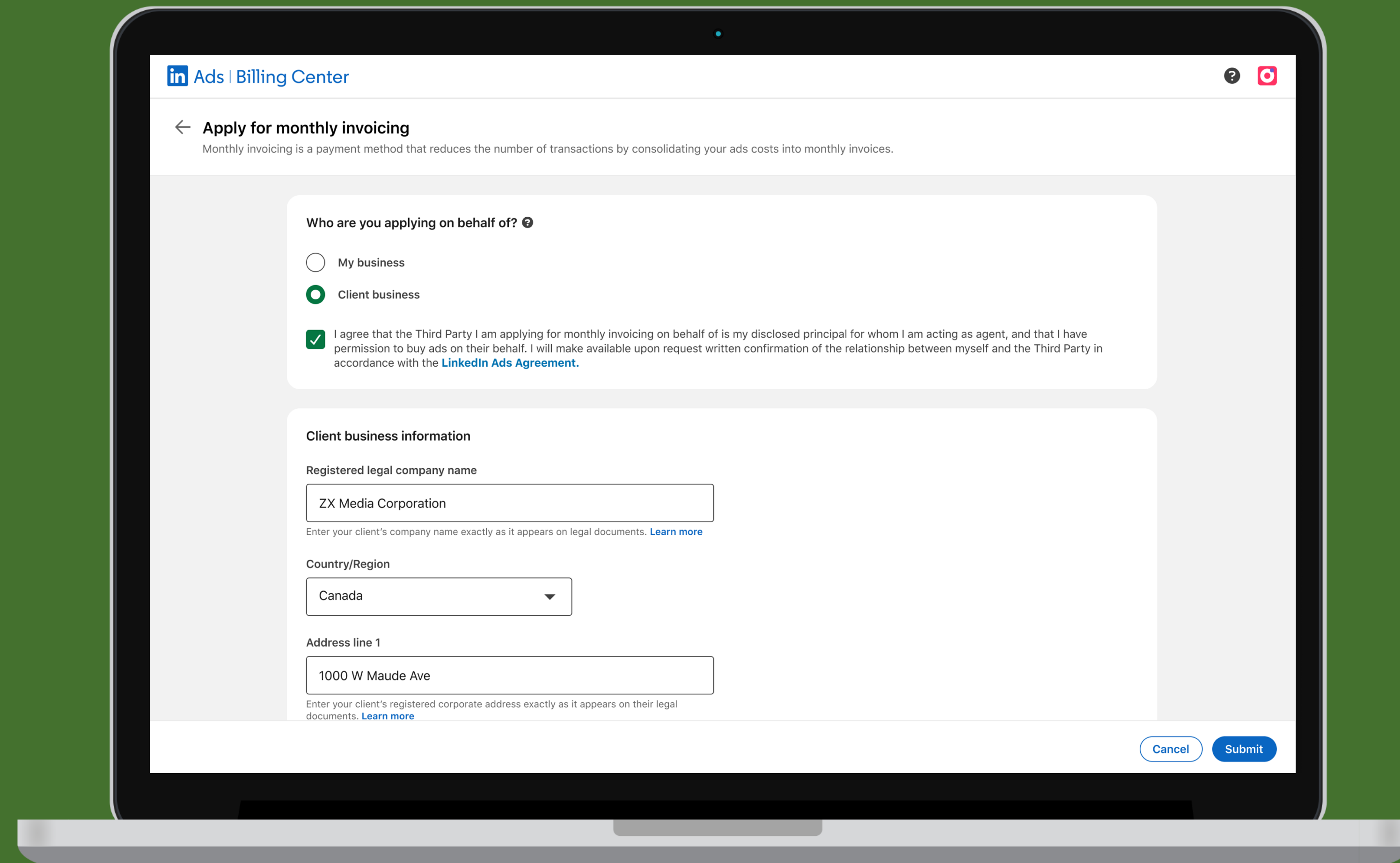


Tip: Your application for monthly invoicing will be rejected if your client already has access to monthly invoicing from their own Business Manager.

STEP 7B:

Gain access to your client's monthly invoicing payment method.

- Select “Client business” when asked who you are applying on behalf of
- Confirm your agreement to the LinkedIn Ads Agreement Third Party payment policy
- Complete a monthly invoicing application on behalf of your client



The screenshot shows the LinkedIn Ads Billing Center interface for applying for monthly invoicing. The page title is "Apply for monthly invoicing" with a subtext explaining that monthly invoicing consolidates ad costs into monthly invoices. The form is divided into two main sections: "Who are you applying on behalf of?" and "Client business information".

Who are you applying on behalf of?

- ☐ My business
- ☒ Client business

☒ I agree that the Third Party I am applying for monthly invoicing on behalf of is my disclosed principal for whom I am acting as agent, and that I have permission to buy ads on their behalf. I will make available upon request written confirmation of the relationship between myself and the Third Party in accordance with the [LinkedIn Ads Agreement](#).

Client business information

Registered legal company name

ZX Media Corporation

Enter your client's company name exactly as it appears on legal documents. [Learn more](#)

Country/Region

Canada

Address line 1

1000 W Maude Ave

Enter your client's registered corporate address exactly as it appears on their legal documents. [Learn more](#)

At the bottom right, there are "Cancel" and "Submit" buttons.



Tip: Review the LinkedIn Ads Agreement [here](#).

3.

Claiming your Invoice Setups

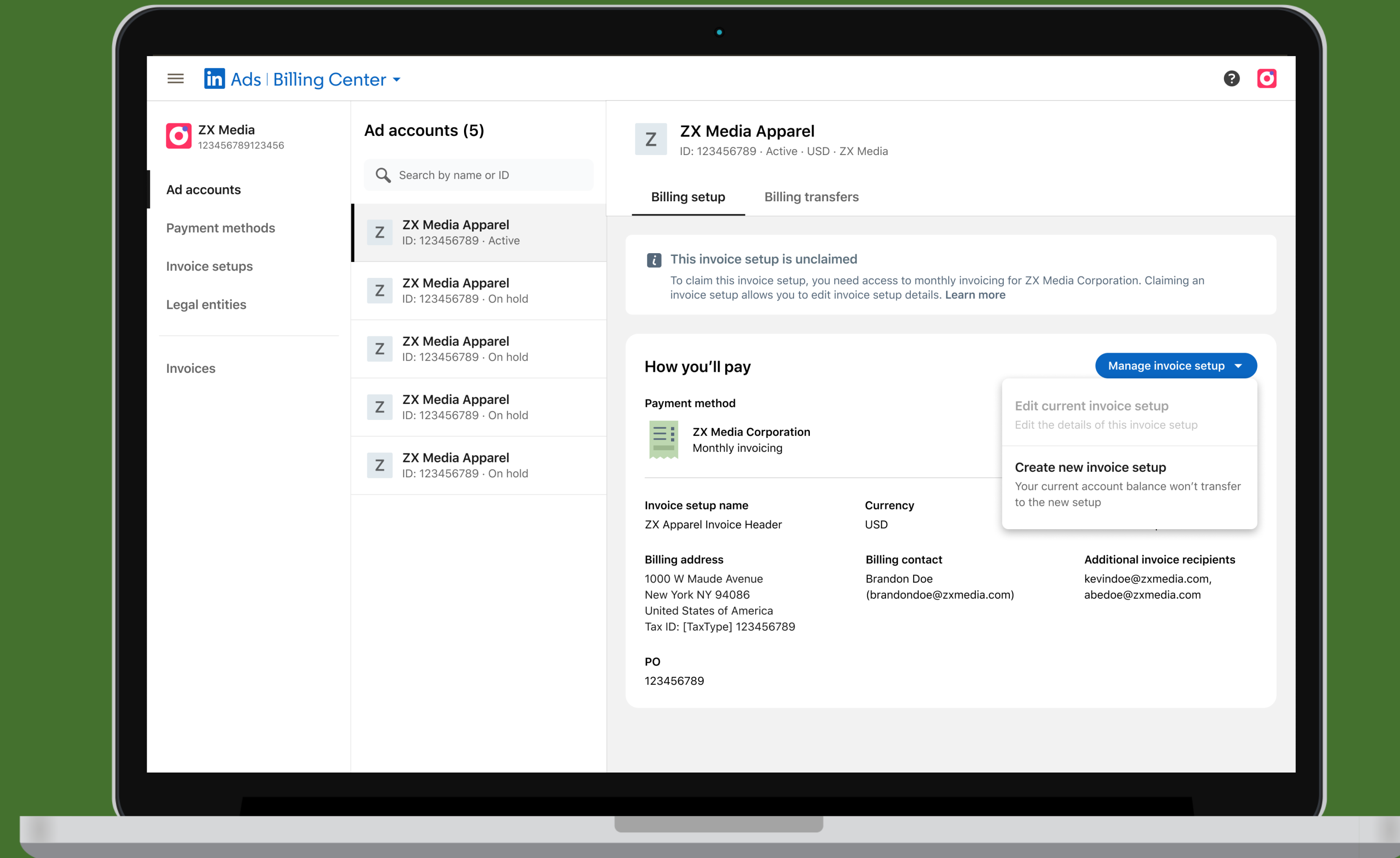


STEP 1:

Claim your Invoice Setups

If your ad account was set up for monthly invoicing before self-serve invoicing was released, you may see a message that your invoice setup is unclaimed.

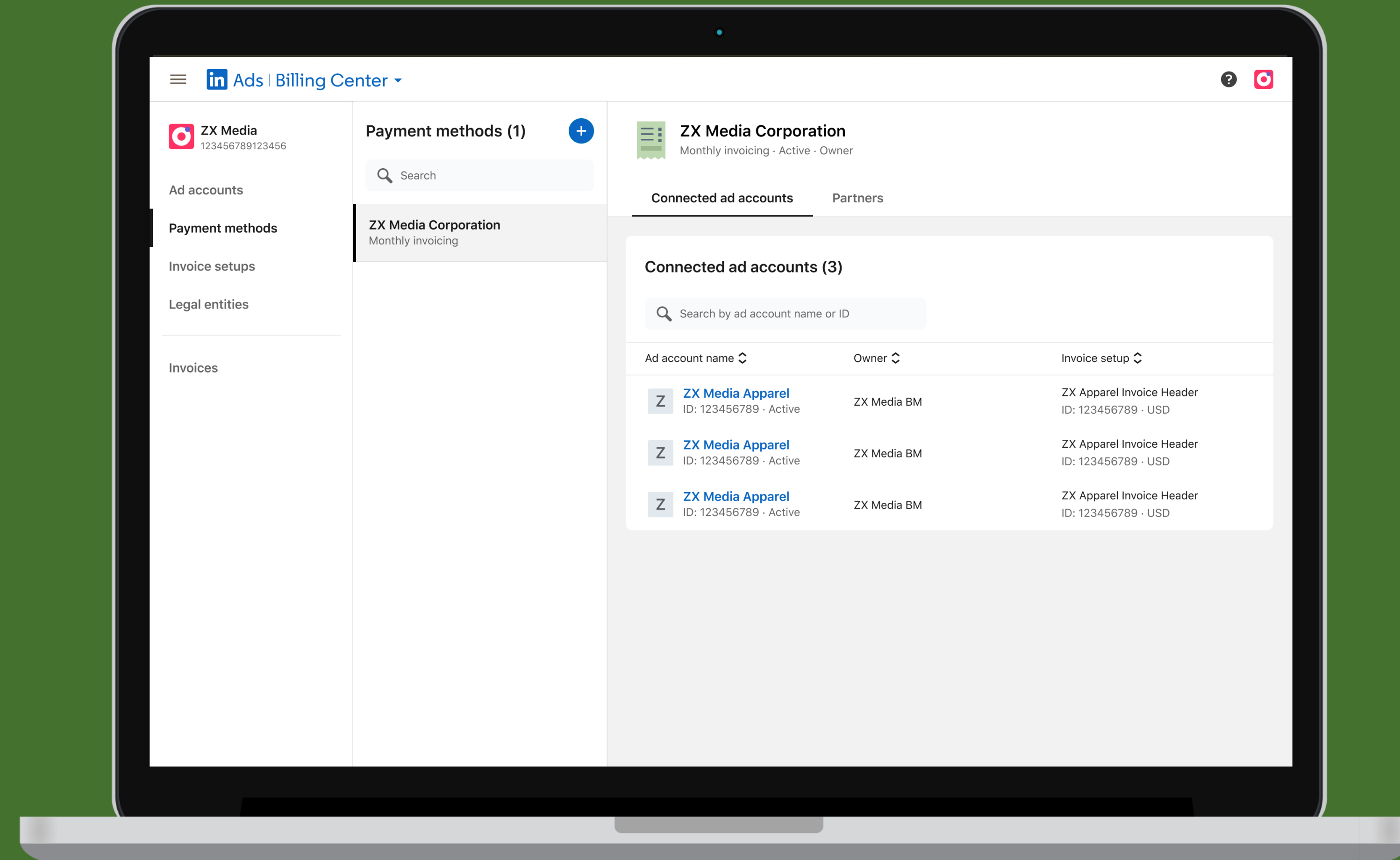
An invoice setup must be claimed before you can edit it. However, you can always create a new invoice setup for your ad account to change the billing setup for an ad account using monthly invoicing payment methods that you already have access to.



STEP 2:

Claim your Invoice Setups

- To claim an invoice setup, you must have access to the legal entity and payment method used in that invoice setup.
- Complete an invoicing application for this legal entity to get access by following steps 1-5 in Section 2 of this Getting Started Guide
- Once you meet the above criteria, the invoice setup will automatically be claimed by your Business Manager and appear on your invoice setups tab.
- If billing is setup on behalf of a client, you must have access to both the Agency bill-to legal entity as well as the client's monthly invoicing payment method. Agency's should not attempt to claim invoice setups which are set up to be billed directly to clients.



Tip: Claiming an invoice setup cannot be undone. Do not claim invoice setups if the bill-to legal entity does not belong to your business or if the ad account is managed by another Business Manager.

4.

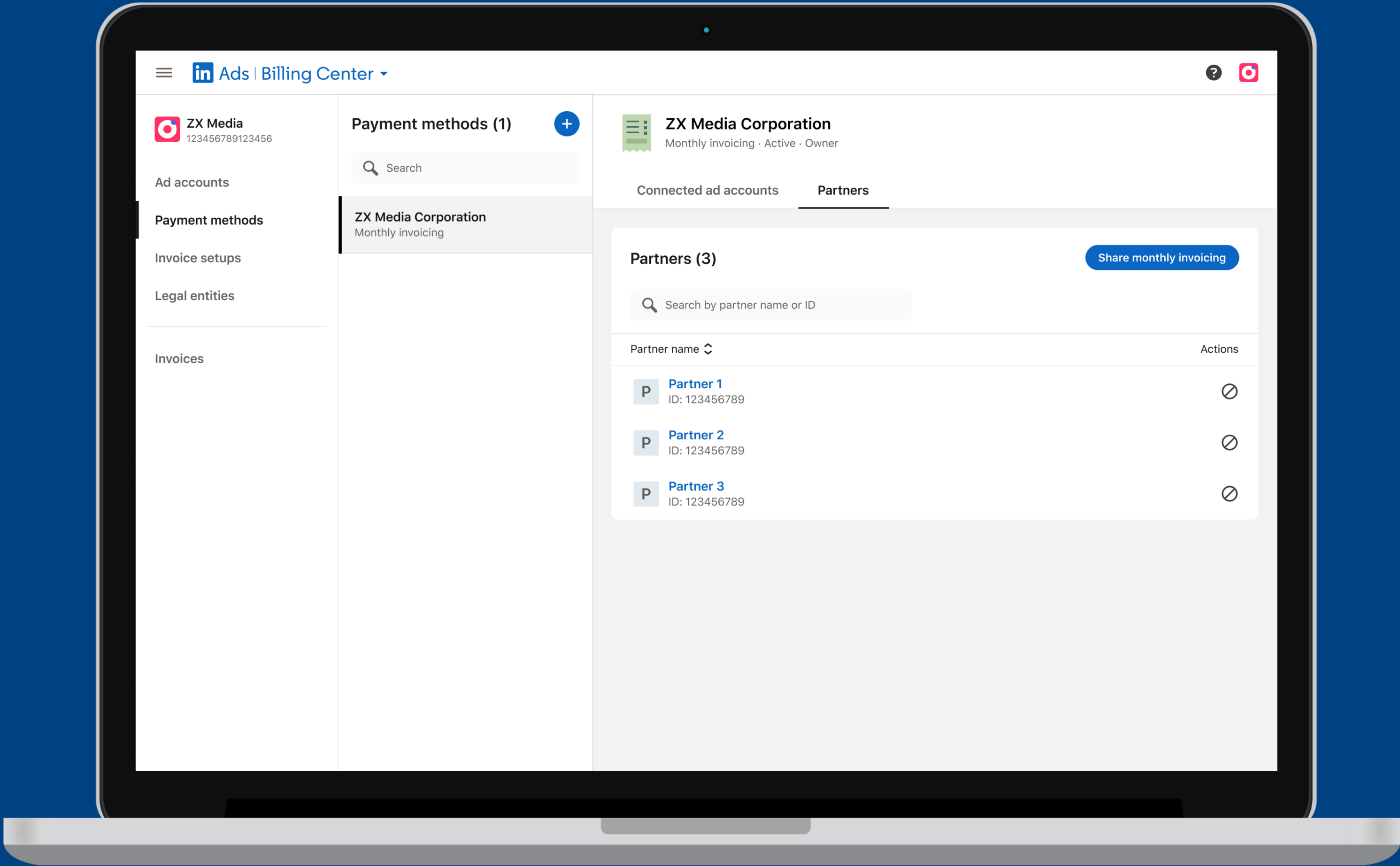
Activate New Ad Accounts for Invoicing



STEP 1:

Make sure you have access to your client's accounts

- Follow steps 4-8 in the above section to gain access to your customer's monthly invoicing payment methods

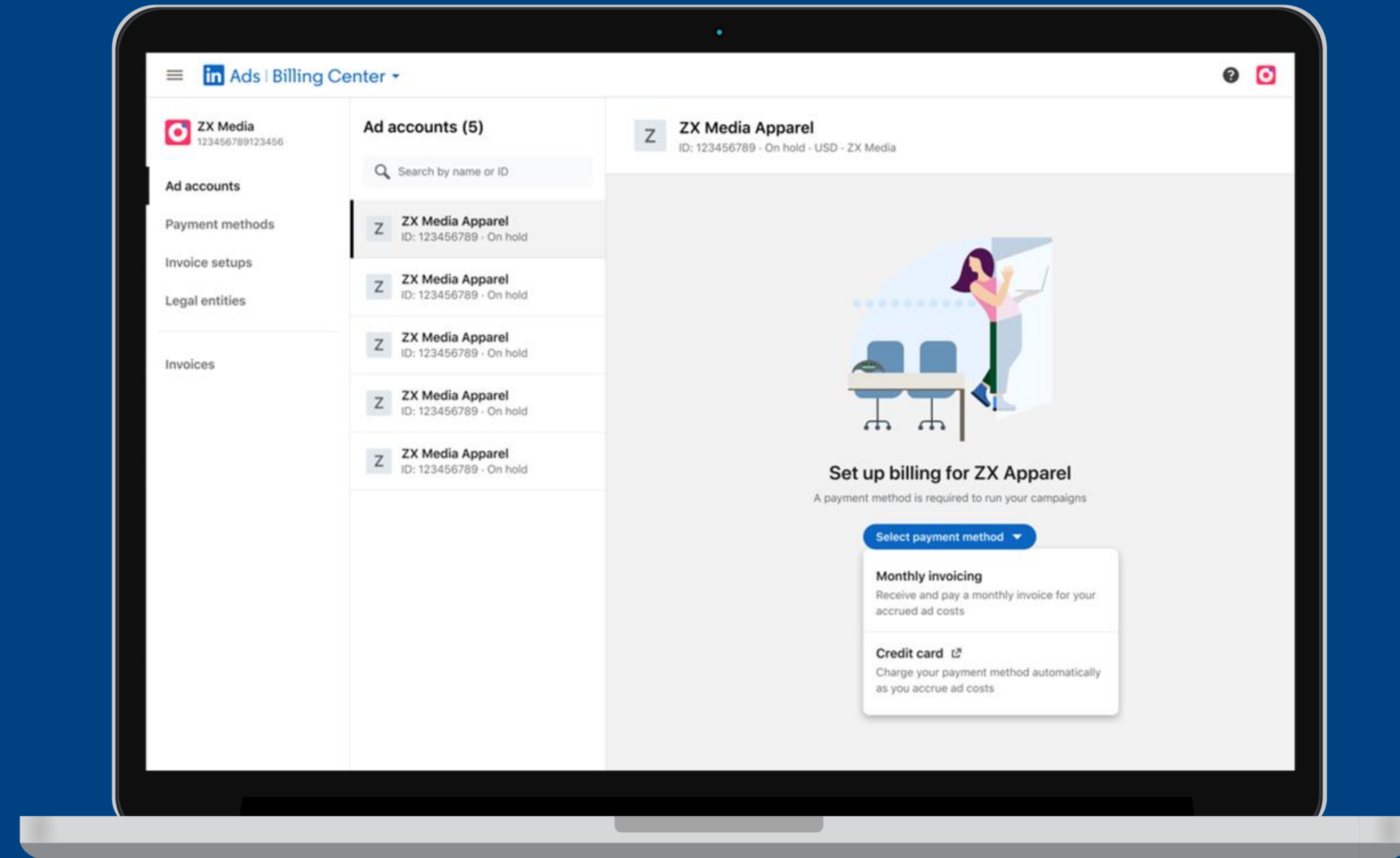


STEP 1:

Setup your new Ad Accounts for Monthly Invoicing

Activate your new ad accounts and begin advertising!

- Navigate to the “Ad Accounts” tab
- Select the account you want to set up for invoicing
- Click “Select payment method” and choose “Monthly Invoicing”

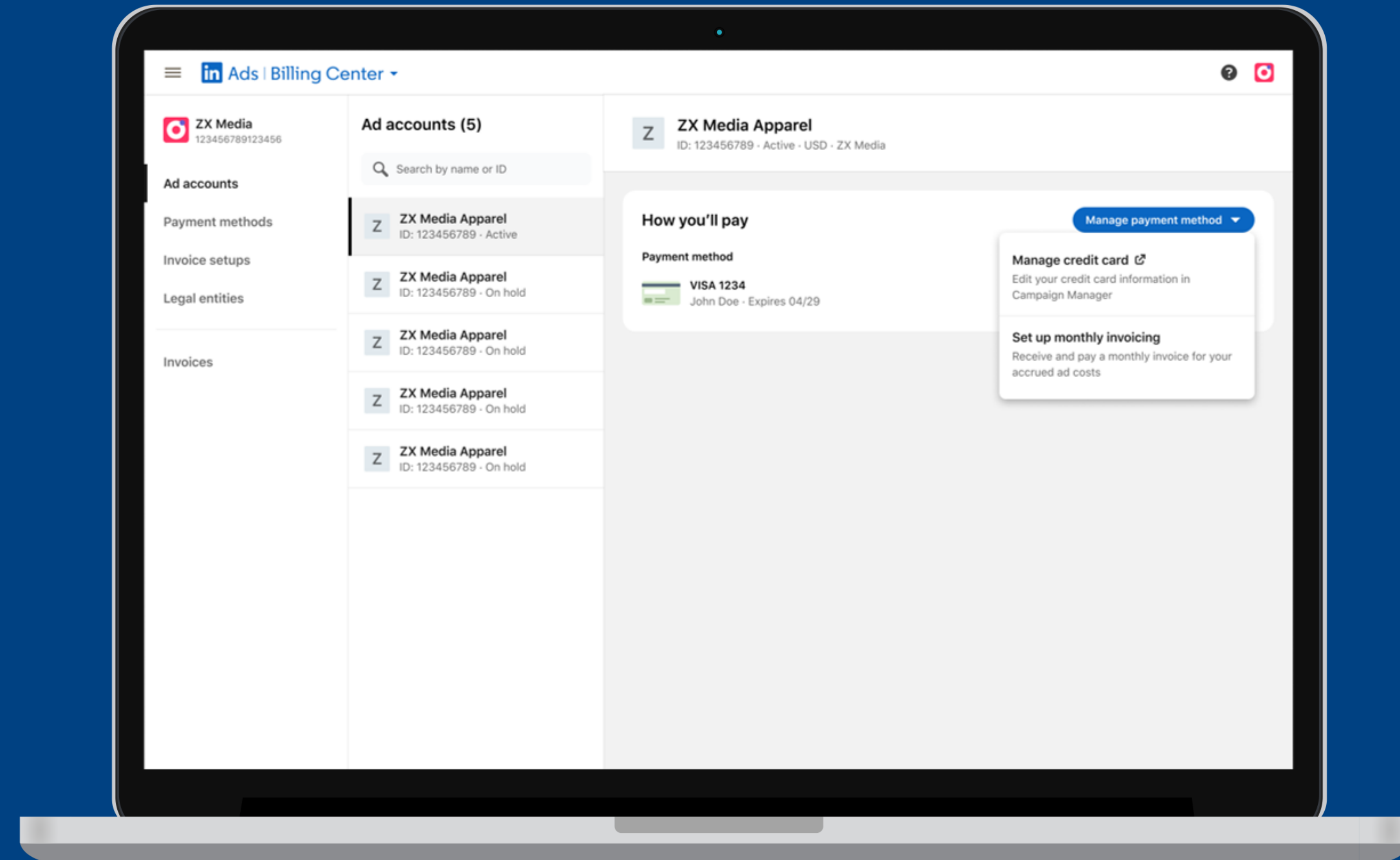


Tip: You'll only see Ad Accounts that are already claimed by your Business Manager or shared at the Billing Admin level. If you don't see the Ad Account you're looking for, head back to Business Manager to claim it. Learn more about claiming ad accounts in Business Manager [here](#).

STEP 2:

Convert an existing account that is currently paid with a Credit Card.

- Navigate to the “Ad Accounts” tab
- Select the account you want to switch to invoicing
- Click “Manage payment method” and choose “Setup Monthly Invoicing”



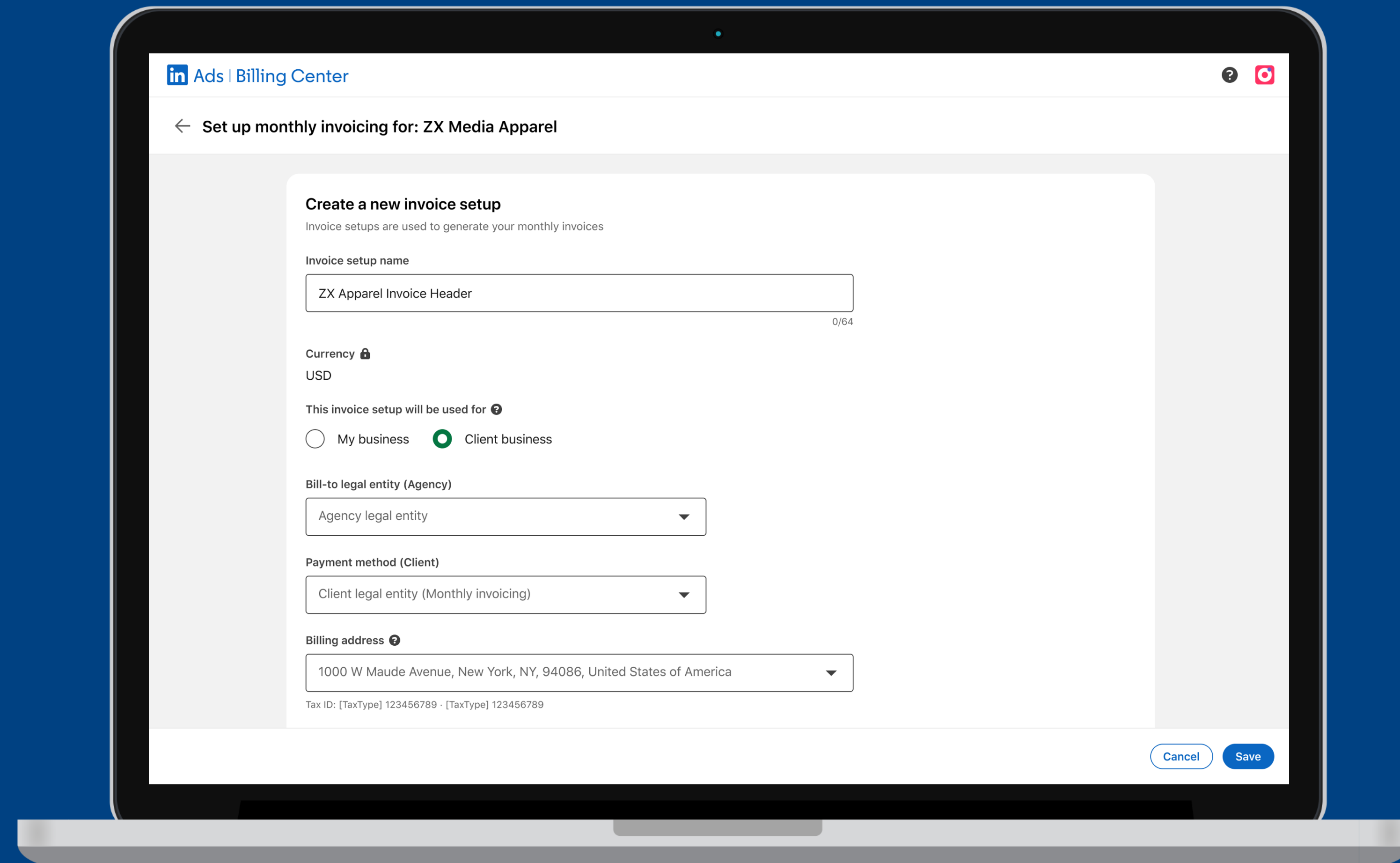
Tip: Once you transition your payment method from Credit Card to Invoicing, this action CANNOT be undone.

STEP 3:

Create an Invoice Setup

Provide your invoice details

- Name your invoice setup
- Select “Client Business” if you are an agency managing invoicing on behalf of your client.
- Select your bill-to-legal entity from the dropdown menu. The bill-to legal entity should be your agency.
- Select a payment method. This should be your client’s business. Only payment methods that have been shared with you or that you applied for on behalf of a client will be available.
- Choose billing contact. We’ll reach out to them in case there are issues with your invoice or payment method.
- Optionally add additional invoice recipients and a PO#



The screenshot shows the LinkedIn Ads Billing Center interface for setting up monthly invoicing for 'ZX Media Apparel'. The form is titled 'Create a new invoice setup' and includes the following fields and options:

- Invoice setup name:** A text input field containing 'ZX Apparel Invoice Header' with a character count of 0/64.
- Currency:** A dropdown menu set to 'USD'.
- This invoice setup will be used for:** Two radio button options: 'My business' (unselected) and 'Client business' (selected).
- Bill-to legal entity (Agency):** A dropdown menu set to 'Agency legal entity'.
- Payment method (Client):** A dropdown menu set to 'Client legal entity (Monthly invoicing)'.
- Billing address:** A dropdown menu set to '1000 W Maude Avenue, New York, NY, 94086, United States of America'.
- Tax ID:** Two input fields, both containing '[TaxType] 123456789'.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right.



Tip: Each ad accounts requires its own invoice setup. Learn more about invoice setups [here](#).

5.

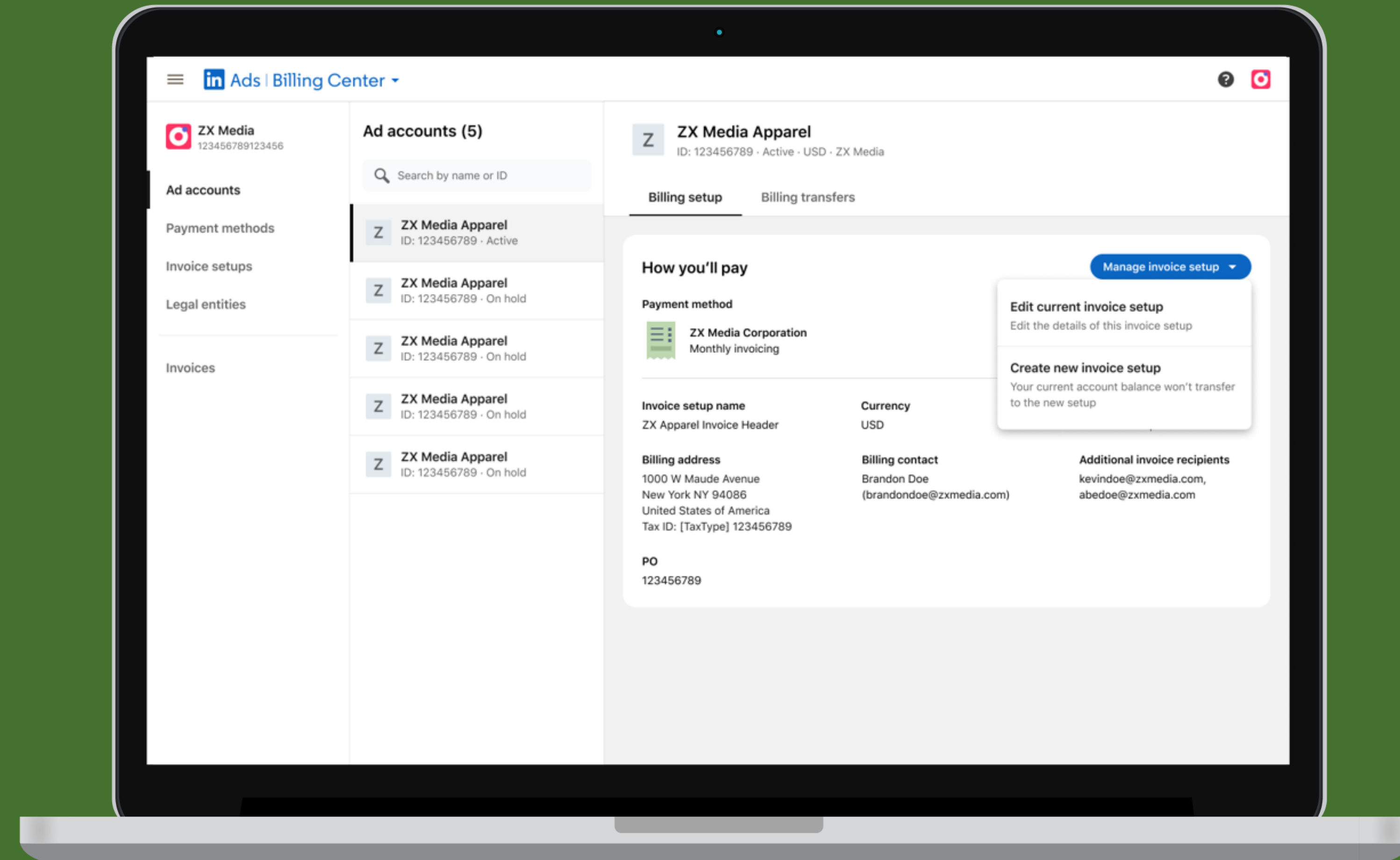
Change how
your ad account
is billed



STEP 1:

Select the Invoice Setup you wish to change

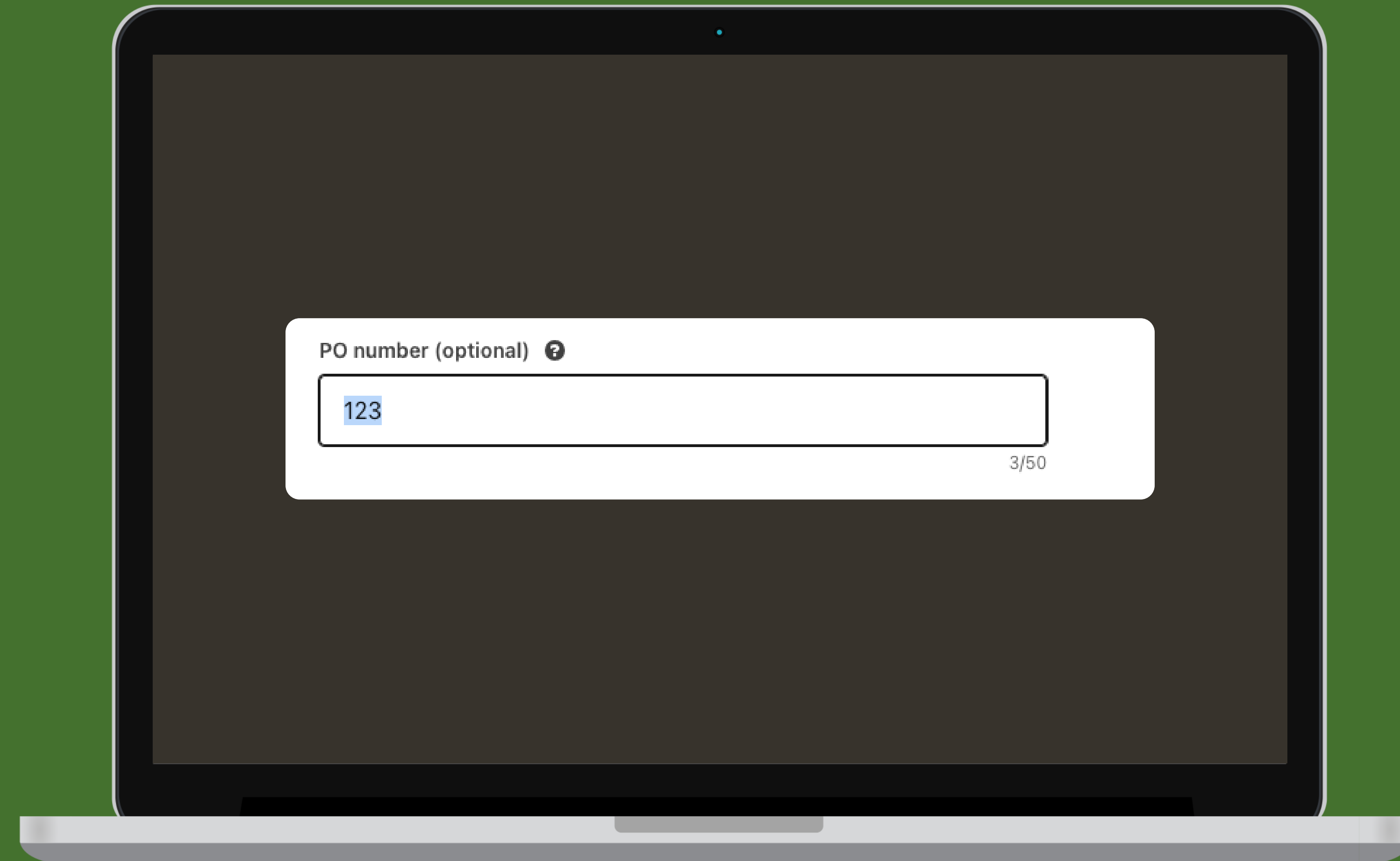
- Navigate to the “Ad Accounts” tab on the lefthand side of the screen
- Select the Ad Account whose invoice setup you wish to change
- Click “Manage Invoice Setup” and “Edit current invoice setup”



Tip: If you wish to create a new invoice setup, follow the steps in Section 3 of this Guide!

Edit PO#s

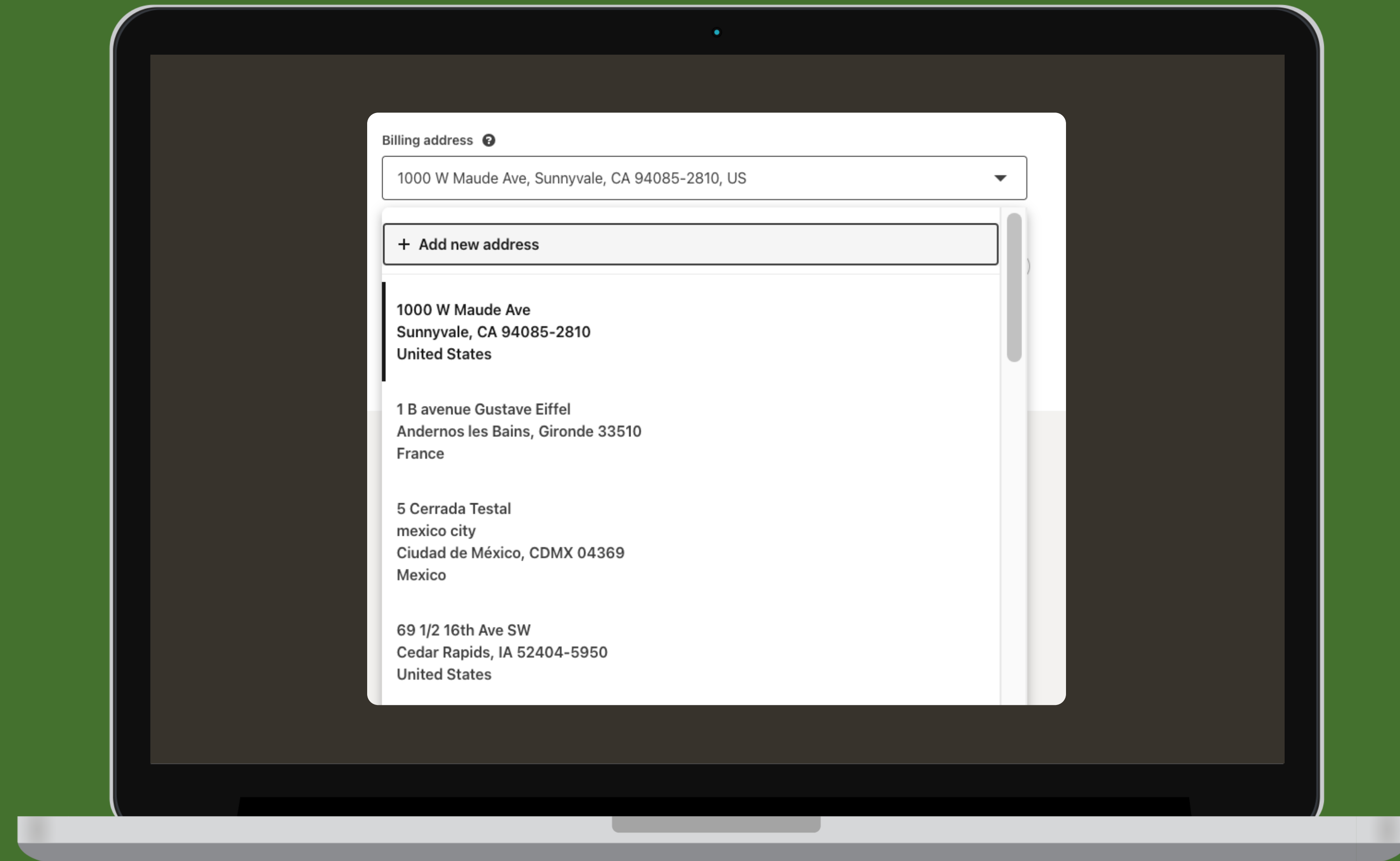
- Select the ad account you'd like to make changes to and then select "Manage Invoice Setup"
- From there you will see the PO# editable field
- Make your desired changes to your PO# and click "Save"
- These changes will be immediately applied to your account



Tip: Each invoice setup creates one invoice per month. If your ad account is connected to multiple invoice setups, you may receive more than one invoice per setup.

Change your billing address

- Select the ad account you wish to make changes to
- Select manage invoice set up, then click “New Invoice Setup”
- Provide an invoice setup name and your new desired billing address and click “Save”

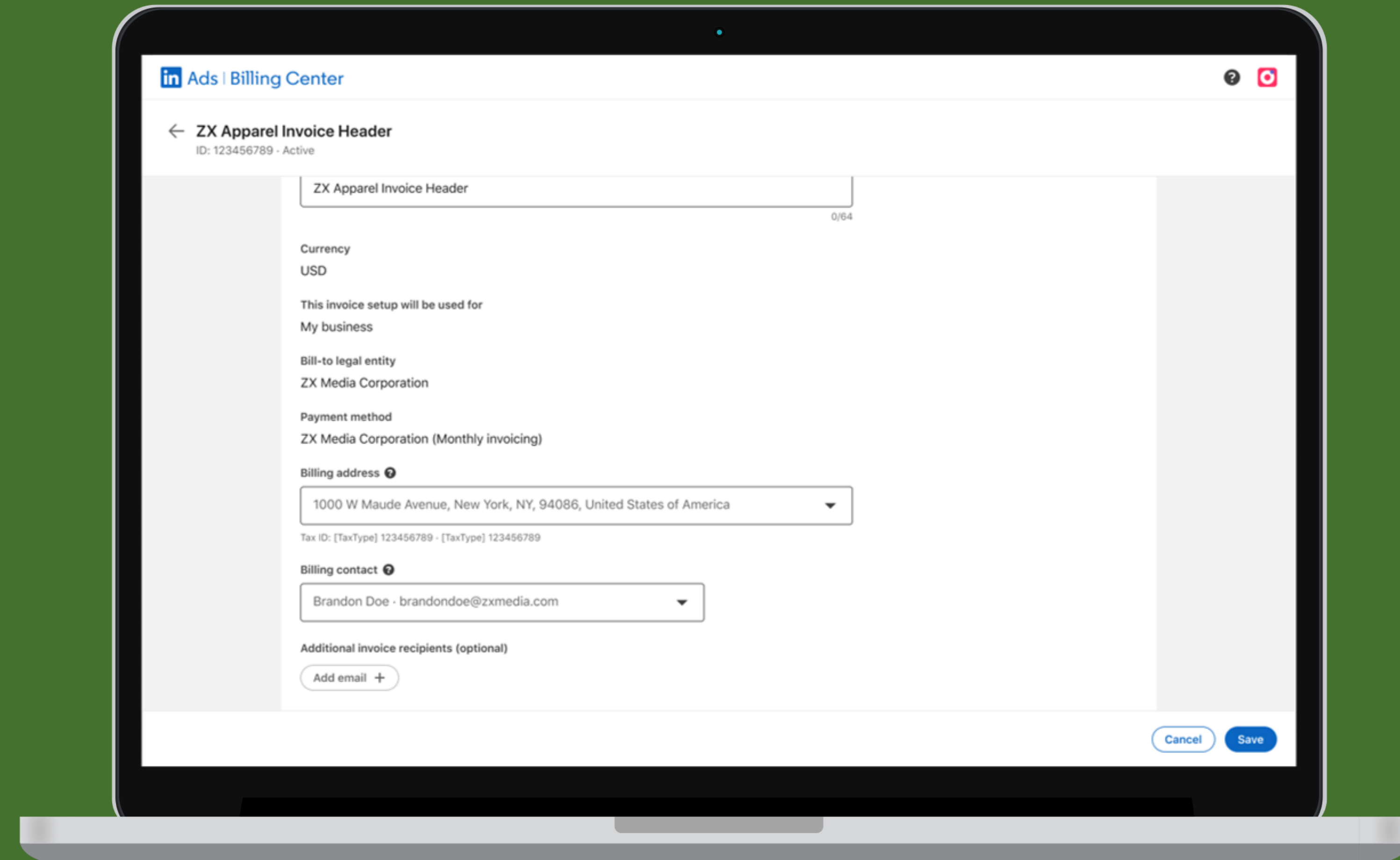


Tip: : If you need to change the bill-to legal entity or billing region for your Ad Account, you **MUST** create a new invoice setup. Follow the instructions in Section 3 to do so.

Add, change, or remove invoice recipients

Edit your invoice setup

- Remove existing invoice recipients of add new ones by selecting “Add Email” and providing additional invoice recipients
- Your account’s Billing Contact is selected by default. You can make changes to your Billing Contact by editing your Legal Entity.



Create a new invoice setup

To change your billing region or effective dates you must create a new invoice setup.

- Select the Ad Account for whom you'd like to create a new invoice setup
- Select "Manage invoice setup," then "Create a new invoice setup"
- Name your invoice setup
- Select "My Business" and your legal entity if you own the payment method for this ad account
- Select "Client Business"
- Select your Billing Contact, and add additional invoice recipients and a PO number if needed
- Choose an effective date from which your ad account will be billed to your new invoice setup

LinkedIn Ads | Billing Center

← Set up monthly invoicing for: ZX Media Apparel

Create a new invoice setup

Invoice setups are used to generate your monthly invoices

Invoice setup name
ZX Apparel Invoice Header 0/64

Currency USD

This invoice setup will be used for
☒ My business ☐ Client business

Bill-to legal entity
ZX Media Corporation

Payment method
ZX Media Corporation (Monthly invoicing)

Billing address
1000 W Maude Avenue, New York, NY, 94086, United States of America

Tax ID: [TaxType] 123456789 · [TaxType] 123456789

Billing contact

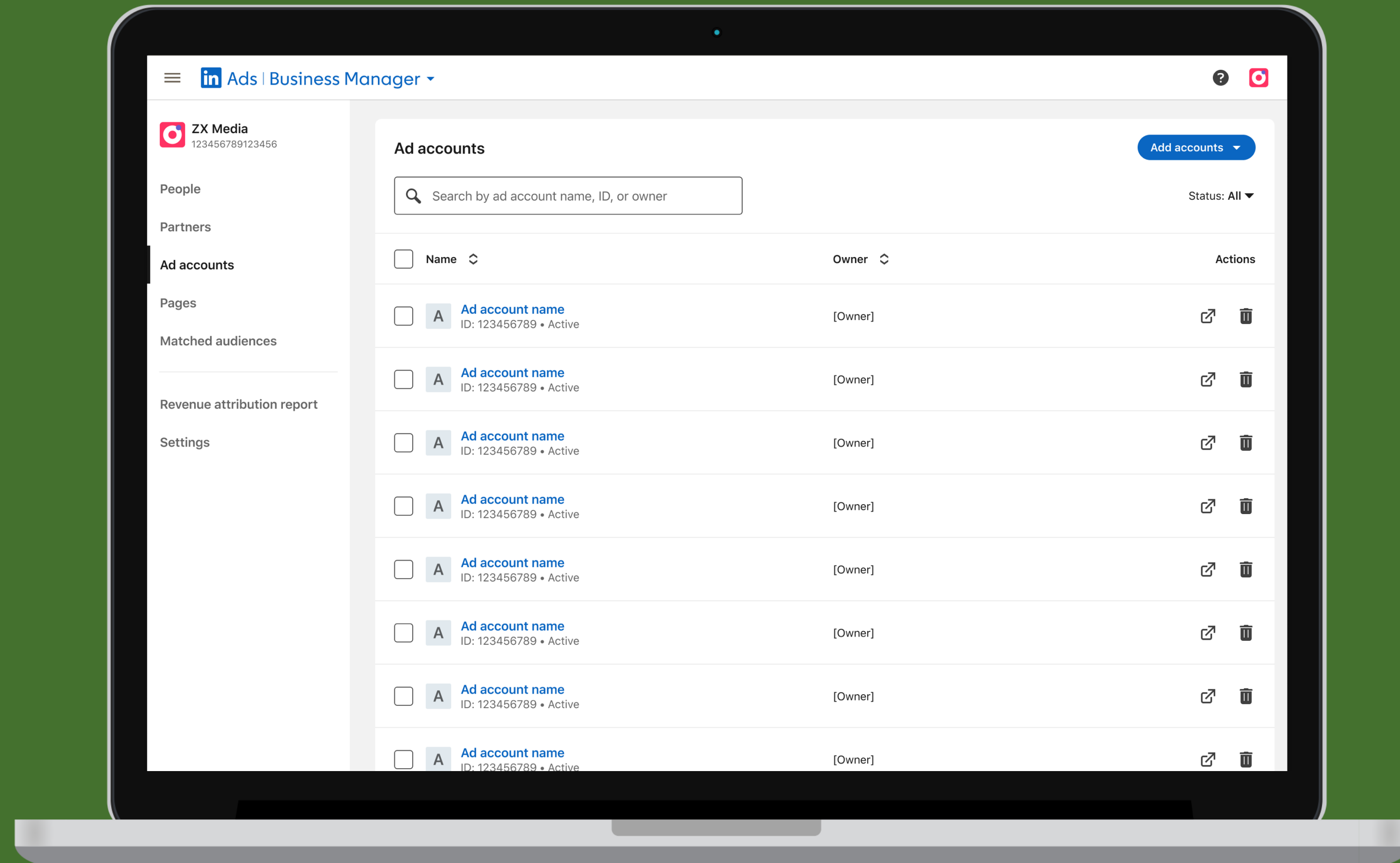
Cancel Save



Tip: To receive fewer invoices, select the first day of the billing period as your effective date.

Removing Invoiced Accounts from Business Manager

- Head to Business Manager and navigate to the "Ad Accounts" tab
- Select the "delete" icon to remove the Ad Account
- Removing Ad Accounts from your Business Manager will cause the accounts to lose access to monthly invoicing and be placed on hold
- To reactivate the removed ad account, claim this ad account in another Business Manager and set it up again for monthly invoicing



Tip: Ad account payment methods cannot be reverted from monthly invoicing to credit card. You must activate your account to a new line of credit to resume spending.

6.

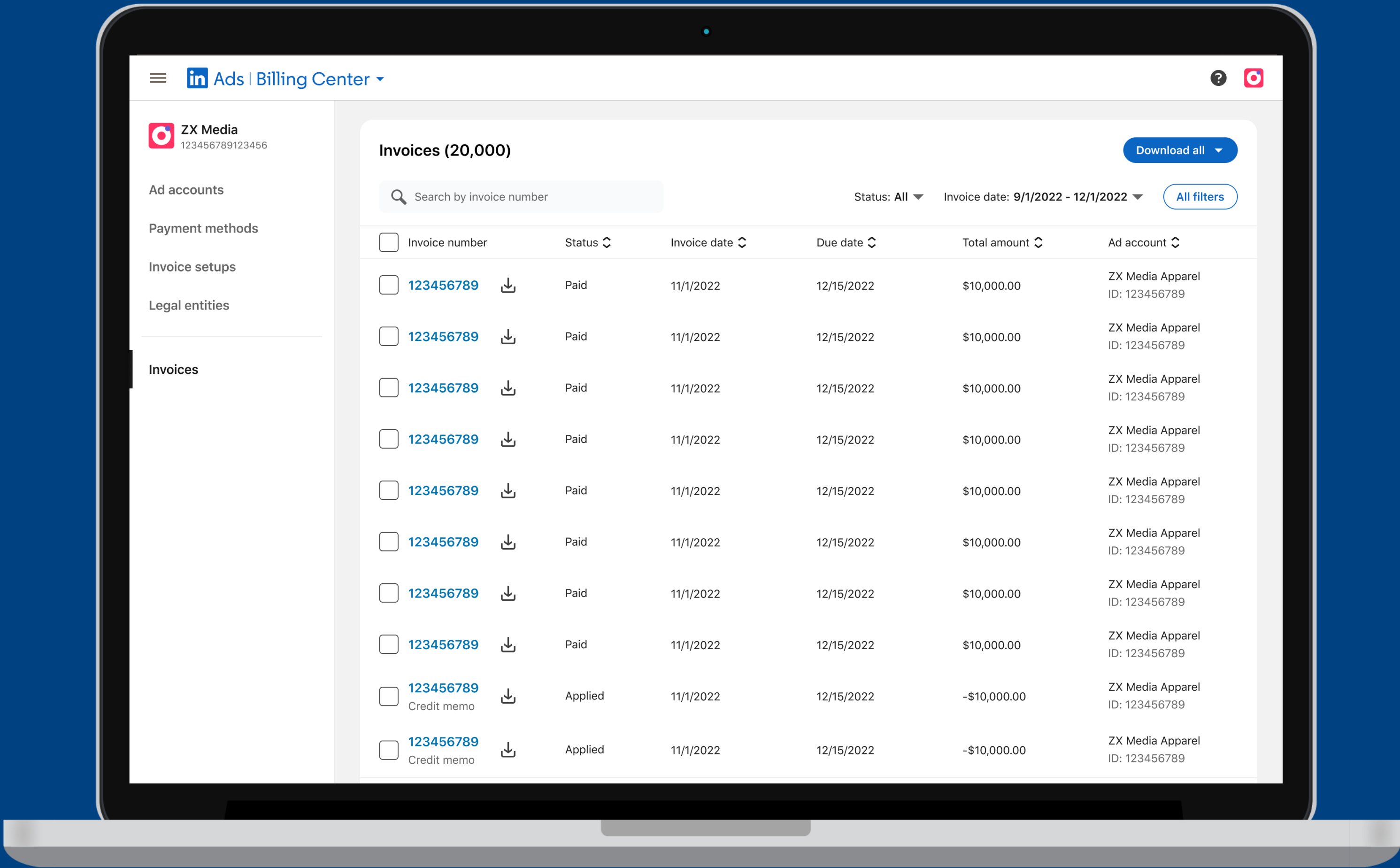
Downloading your Invoices from Business Manager



Downloading your invoices from Business Manager

Simplify reconciliation with the Invoice Dashboard

- View invoices, details and payment status
- Sort and filter invoices by date, status, amount, ad account, and more.
- Download PDF invoices and generate CSV Billing Reports.



Tip: Learn more about the Invoice Dashboard [here](#).

7.

FAQs & Troubleshooting



FAQs:

Business Manager & Ads Billing Center

✓ Why Business Manager?

Much like other Ad Platforms, establishing monthly invoicing at the Business Manager level allows you to reuse your monthly invoicing payment method across multiple ad accounts without having to re-apply.

✓ Will I be required to use Business Manager?

You will continue to be able to setup ad accounts using the existing invoicing setup process until December 2024. After which, you will be required to adopt Business Manager in order to setup new ad accounts for monthly invoicing.

You will still be able to request changes to how you are invoiced via support during this period"

✓ Why can't I see all my ad accounts in the Billing Center?

You will only see ad accounts in the billing center claimed by your Business Manager or shared with your Business Manager at the Billing Admin permissions level in the Ads Billing Center.

FAQs:

Setting up Monthly Invoicing

✓ Who qualifies for Monthly Invoicing?

To qualify for monthly invoicing you must:

- Spend \$3000 per month with LinkedIn Ads for at least 2 consecutive months during the last year.

If you meet the above criteria but are unable to apply for monthly invoicing in the Ads Billing Center, please contact Support.

✓ Why can't I activate my account for monthly invoicing?

There are 3 likely reasons you cannot activate your account for monthly invoicing

1. Your account is on hold – review account hold reasons here and follow in-product guidance to remove your hold status.
2. You don't qualify for monthly invoicing – contact Billing Support
3. You don't have any invoicing payment methods set up – Apply for monthly invoicing.

✓ How do I know if I'm applying on behalf of my business or for a client?

- If you are an advertiser and you will receive and pay your own invoices, then select "my business" when applying for monthly invoicing or setting up monthly invoicing for your ad account.
- If you are an agency and will be receiving and paying an invoice on your clients behalf, and later billing your client for their ad costs choose "client business" when applying for monthly invoicing or setting up monthly invoicing for your ad account.
- If you are an agency and your client wishes to be billed directly for their ad costs, the client should setup billing for their ad account directly.

FAQs:

Setting up Monthly Invoicing

✓ What if my end client doesn't want to set up a Business Manager?

- The agency may apply for monthly invoicing on behalf of the client if their client does not already have a Business Manager setup and is not able to share monthly invoicing with the agency.
- However, the agency must be able to make available upon request written confirmation of the relationship between themselves and the Third Party in accordance with the LinkedIn Ads Agreement.

✓ What if my end client would like to own the ad account but have the agency receive the invoices?

The end client should share the ad account with the Agency Business Manager at the Billing admin permissions level. The agency will then be able to set up billing from their own Business Manager on behalf of the client.

✓ Is the agency or end client able to see the actual amount of credit available?

No, LinkedIn will alert the customer if there are any issues regarding available credit or payments.

✓ What happens if the relationship between an agency and end client is terminated?

- If the client has shared their monthly invoicing payment method with the agency, they should revoke the agency's access which will put on hold any accounts owned by the agency using the client's monthly invoicing.
- If the client has shared ad accounts with the agency, the client should revoke the agency's access to these ad accounts in order to prevent the agency from taking further actions using those accounts.
- If the client has no direct relationship with LinkedIn, then the agency will need to suspend the ad accounts. The agency can request a monthly invoicing payment method to be removed from their Ads Billing Center by contacting customer support.

FAQs:

Invoice Setups

✓ Why can't I see any invoice setups?

- If you cannot see any invoice setups, this means that you either have not created any, or have not claimed any invoice setups currently in use by your ad accounts.

✓ Why am I seeing my invoice setup is unclaimed?

- Unclaimed invoice setups were created to support the launch of self-serve invoicing.
- To claim an invoice setup, your business manager must either own the ad account or have been shared access to the account at the billing admin level. Additionally, you need access to the bill to legal entity and payment method in order to automatically claim the invoice setup.
- See Step 1 in section 3 of this guide in order to claim your invoice setup.

✓ Why can't I change my effective date in my invoice setup?

- Your invoice setup effective date will be set to the day you have created your invoice setup if you are activating your account to monthly invoicing for the first time. If your account payment method was previously credit card, any outstanding charges will be added to your next invoice.

✓ Why can't I edit my invoice setup?

Some common reasons you may not be able to edit an invoice setup:

- The invoice setup is owned by another Business Manager. If a partner has shared an ad account with you at the billing admin level, you will be able to see the invoice setup but not edit it. If you want to change how this account is billed, you will need to create an invoice setup in your own business manager.
- The invoice setup is unclaimed. See our previous FAQ on unclaimed invoice setups.
- The invoice setup has been placed on hold. If you're unable to edit your invoice setup and its status is on-hold, please contact billing support.

✓ Why can't I change my billing address in my invoice setup?

- Once an invoice setup has been created, you can only change the address if the new address is within the same billing region.
- If you want to change your billing region, you must create a new invoice setup.
- Learn more about billing regions [here](#).

FAQs:

Making Changes to your Legal Entity

✓ How do I update my Tax ID?

- In order to update your Tax ID for your monthly invoicing legal entity, please contact LinkedIn Support

✓ How do I change my Billing Contact?

- You can change your billing contact for a particular invoice setup by editing that invoice setup.
- If you need to add a new billing contact, click "add billing contact" from the dropdown menu when selecting your billing contact, or add them by going to the billing contact page on the legal entities tab.





Thank you!