



Getting Started with:

# LinkedIn Business Manager Public Beta



# What you will learn in this guide

Introduction	How it Works	Using Business Manager	FAQ	Resources
<a href="#">Business Manager Overview</a>	<a href="#">How Business Manager works</a>	<a href="#">Onboarding Steps:</a> <ul style="list-style-type: none"><li>- Invite Admins</li><li>- Add Ad Accounts</li><li>- Add Pages</li><li>- Setup Partnerships</li><li>- Invite other users</li></ul>	<a href="#">What happens when an Account or Page is added?</a>	<a href="#">Helpful Resources</a>
<a href="#">What can you do with Business Manager?</a>	<a href="#">Limitations</a>		<a href="#">How do permissions work?</a>	
<a href="#">Why should you use Business Manager?</a>	<a href="#">Onboarding Considerations and Checklist</a>	<a href="#">Using Business Manager:</a> <ul style="list-style-type: none"><li>- People</li><li>- Ad Accounts</li><li>- Pages</li><li>- Partners &amp; Sharing</li><li>- Audience Sharing</li></ul>	<a href="#">How do I work with other businesses?</a>	
			<a href="#">Which Accounts can I add?</a>	
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**TIP:** Click the home button to return to this page at any stage during this guide.



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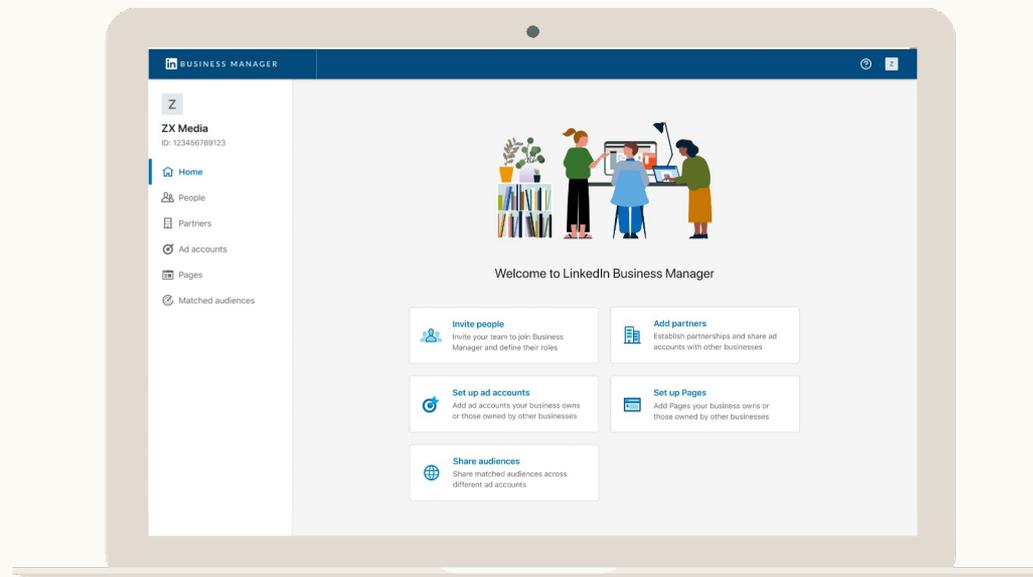


# Introducing Business Manager



# What is Business Manager?

Business Manager is your place to easily manage all of your organization's Ad Accounts and Pages.





# What can you do with Business Manager?



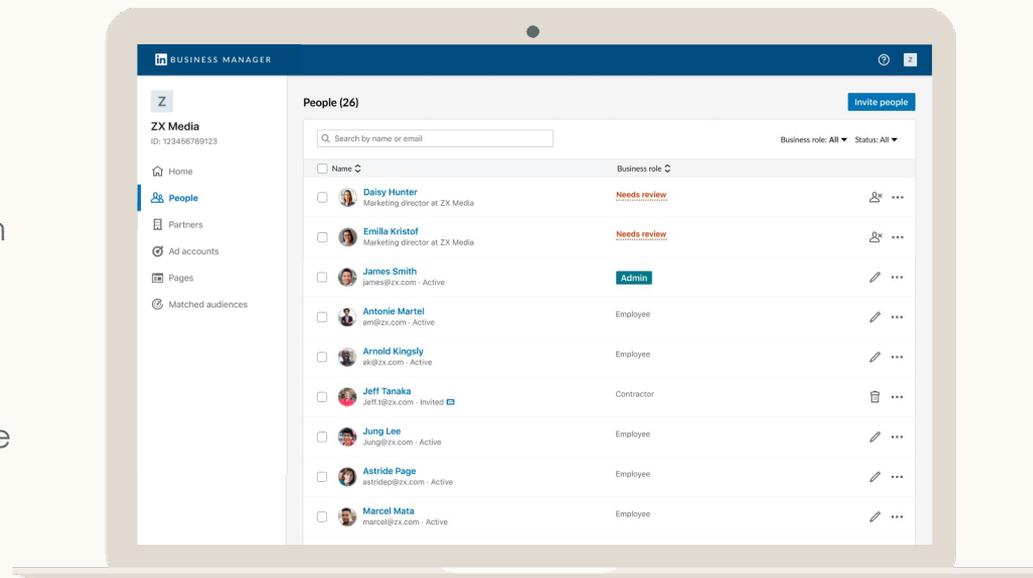
Link all your Ad Accounts and Pages to a single dashboard.



Give people and businesses the access they need or remove them in a click - all from one place.



Share Matched Audiences across Ad Accounts - whenever an audience is updated, that change is instantly reflected across all the campaigns using it.





# Why should you use Business Manager?

	Feature	Benefit
You use multiple Accounts & Pages	<ul style="list-style-type: none"><li>• Add all your organization's Ad Accounts and Pages to Business Manager.</li></ul>	<ul style="list-style-type: none"><li>• Simplify your marketing experience on LinkedIn with central visibility across all your marketing activity.</li></ul>
You work with other businesses	<ul style="list-style-type: none"><li>• Add Business Manager Partners to share Ad Account and Page access with another business.</li></ul>	<ul style="list-style-type: none"><li>• Quickly onboard other businesses to your Accounts and Pages so they can market on your behalf.</li></ul>
You have large marketing teams	<ul style="list-style-type: none"><li>• Add and remove multiple people across Accounts and Pages.</li></ul>	<ul style="list-style-type: none"><li>• Easily ensure the right people and businesses have access to the right Accounts and Pages.</li></ul>
You use the same audiences across Accounts	<ul style="list-style-type: none"><li>• Share Matched Audiences across Accounts.</li></ul>	<ul style="list-style-type: none"><li>• Reach your buyers easily across Accounts.</li></ul>



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# How does Business Manager work?



# How does Business Manager work?

Don't worry!

Getting started won't disrupt your current paid and organic efforts:

- You don't need to recreate your Ad Accounts or Pages.
- Your live campaigns, billing, and data integrations won't be impacted.
- Existing users on Accounts and Pages won't lose access.

- 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.



# Business Manager Public Beta Limitations

The Public Beta experience is a full end-to-end solution that's been tested in a closed Beta for over a year with 100 advertisers.

We've gotten great feedback from the Beta and want to get Business Manager in as many advertisers' hands as possible.

The Public Beta positioning reflects that there's still many features we're excited to build in Business Manager like cross-account reporting and billing, 2FA, and more!



Once a Business Manager establishes ownership over an Ad Account, access can only be managed through Business Manager. Don't worry - we won't automatically remove anyone from Ad Accounts during this process. We'll keep access management open in Pages for a couple months after the initial release.



Setting up billing & data/API integrations remain at the Ad Account level and won't be impacted. We recommend ensuring Billing Admins and whoever set up any integrations is added to Business Manager.



Reporting remains at the Ad Account level in Campaign Manager. We're currently working on cross-account reporting in Business Manager.



Certain actions like removing an Ad Account from Business Manager or unsharing Ad Account access with a Partner will require help from LinkedIn Support.



Two-factor authentication is not currently available in Business Manager or Campaign Manager - but we're working on it now. In the meantime, your employees can turn 2FA on for their LinkedIn profile by following these [instructions](#).



# Onboarding Considerations

- Checklist before you get started
- Deciding the best Business Manager Setup for your organization
- Different ways to add Ad Accounts and Pages to your Business Manager
- How prior Ad Account and Page permissions will migrate to Business Manager
- How Agencies and Brands can work together across Ad Accounts and Pages



# Before you go any further...

Here is a checklist of everything we recommend doing before you onboard to Business Manager:



### **Identify who will lead onboarding and internal comms**

We recommend someone with good visibility across your marketing org and someone in regular contact with your LinkedIn account team.

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### **Think through how to organize your Business Manager**

Do you want one global Business Manager for better visibility? Or are your marketing activities separate across regions or business units?

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### **Compile your Accounts, Pages, and People**

Identify the employees and their corporate emails you'll invite to Business Manager, as well as your Ad Account IDs and Pages that you need to add.

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### **Decide Agency-Client Ad Account ownership**

Business Manager allows one business to own an Ad Account or Page and others to access it. The smoothest experience is for the company that manages billing be the owner. LinkedIn can support transferring ownership through a support process if both parties agree.



# Setup Considerations

*A Business Manager is defined by which people, Ad Accounts, and Pages an organization chooses to add to it. You can have One Global Business Manager or multiple divided by Region, Business Unit, or another factor.*



## One Business Manager

**Best if global visibility is top priority**

- Supporting all Business Units and Regions requires more Admins who have full Business Manager access.
- May lead to a less organized Business Manager, unless you use consistent naming conventions.

Note: You can have Ad Accounts with different billing and currencies in the same Business Manager.



## Multiple Business Managers

**Better if you need tighter control over a set of Accounts & Pages**

- Requires more upkeep to maintain global visibility across many Business Managers.
- An asset can only be owned by one Business Manager but shared with others. If an asset like a Page needs to be used by many different regions or business units, the owner must share it with them.



There are two ways to add Ad Accounts to your Business Manager that are determined by Account ownership.



### Own the Ad Account

Use this option if your business owns the Ad Account (recommended if you pay the bills)

- Users with legacy Ad Account access will appear in Business Manager and can be invited by an *Admin* to migrate to Business Manager, removed from the Ad Account, or left alone.
- *Admins* can assign people any role on the Account.
- Matched Audiences created in these Ad Accounts can be shared to other Ad Accounts by *Admins*.
- Ad Account *Billing Admin* can only be managed through Business Manager if the person has accepted their invite to Business Manager.



### Request Access to an Ad Account

Use this option if it's another business's Ad Account

- *Admins* can only assign their people the roles the owner specifies.
- Owner can remove your Ad Account as desired and your people will lose access.
- You will only be able to manage permissions through Business Manager, but the other business can keep using Campaign Manager.
- Your Business Manager users with Ad Account access can create, edit, and delete Matched Audiences. However, these audiences cannot be shared across Ad Accounts.
- Business Manager must be granted *Billing Admin* access to the Ad Account to manage *Billing Admin* role from Business Manager.



## Considerations: Ad Account Permissions Once In Business Manager



After your Business Manager has connected an Ad Account to it, permissions will migrate to and be exclusively managed from Business Manager.



### User Invited to Business Manager

**We recommend inviting all existing Ad Account users to Business Manager**

- They will have their prior access automatically migrated to Business Manager.
- Permissions can be edited in Business Manager.
- Someone can be removed from Business Manager, which will automatically remove them from any Ad Account or Page they have access to through Business Manager.



### User Not Invited to Business Manager

**Not Recommended**

- They will retain access to the Ad Account unless explicitly removed by a *Business Manager Admin*.
- These people must be invited to Business Manager first before their roles can be updated which can be done easily from the people page in Business Manager.
- Removal can be done from Business Manager across all Ad Accounts and Pages that are part of your Business Manager.



There are two ways to add Pages to your Business Manager that are determined by Page ownership.



### Add the Page

**Use this option if the Page belongs to your business**

- A *Page Super Admin* must be added to the Business Manager before an ownership request can be sent.
- *Business Manager Admins* and *Page Super Admins* can assign people Page access across all roles.
- *Business Manager Admins* can share the Page with other Business Managers so they can assign their people access. For example, if your organization works with agencies that require Page access.



### Request Access to the Page

**Use this option if it's another business's Page**

- *Business Manager Admins* can only assign their people Page access to the roles the *Page Super Admin* specified.
- *Business Manager Admins* cannot share the Page to other Business Managers.



## Considerations: Page Permissions Once In Business Manager



Once a Page is added, managing Page access can be done in Business Manager by Business Manager Admins or Page Admins. Page Admins can keep managing access from Pages for a few months after the release as well.



### User Invited to Business Manager

#### We recommend inviting all existing Page users to Business Manager

- They will have their prior permissions automatically migrated to Business Manager for all Page roles.
- Permissions can be edited in Business Manager by *Business Manager Admins* or *Page Super Admins*.
- Someone can be removed from Business Manager, which will automatically remove them from any Business Manager Page.



### User Not Invited to Business Manager

#### Not Recommended

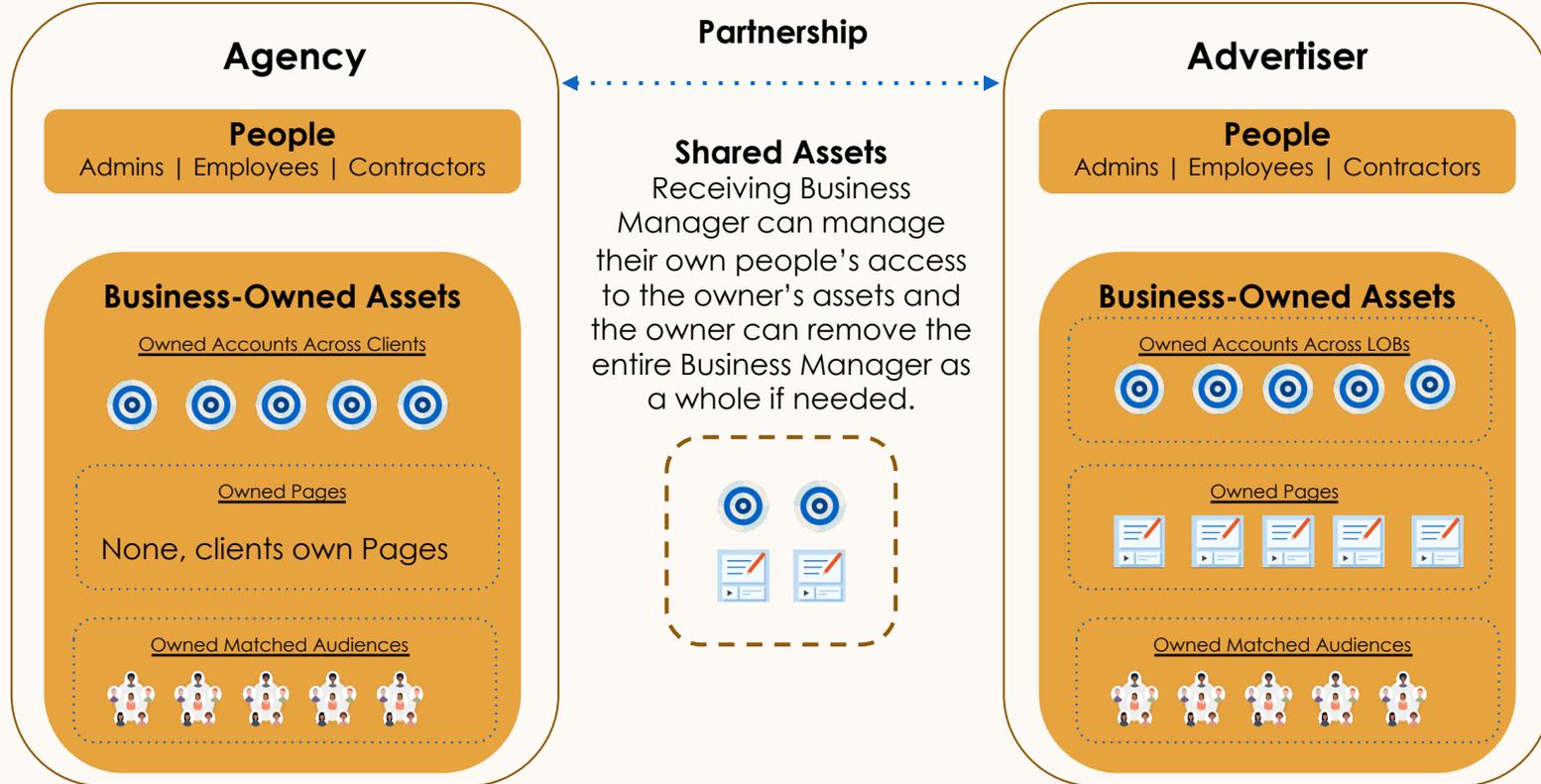
- They will retain access to the Page and can continue to work like normal.
- Super Admins can still manage page access, but a few months after the initial release, they must be onboarded to Business Manager to do so.
- Permissions, including removal, can only be managed on a single Page versus across Pages available in Business Manager.



## Considerations: How to work with other Businesses?



Partnerships allow two Business Managers to share access to specific Ad Accounts and Pages, so each business can manage their own employee's access for as long as necessary.





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# How to set up Business Manager



Before onboarding, review role definitions and when to use each. Admins lead onboarding.

	Role Overview	When to use
Admin	<ul style="list-style-type: none"><li>Admins have super access. They can invite employees, add Ad Accounts and Pages, create Partnerships, share/unshare Matched Audiences, and access all Ad Accounts and Pages.</li></ul>	<ul style="list-style-type: none"><li>Use for more senior level marketers that require complete views of your marketing activities and are in charge of user permissions. You should limit to as few as possible but always 2+ to avoid lockouts.</li></ul>
Employee	<ul style="list-style-type: none"><li>Employees have view only access and can only access the specific Ad Accounts and Pages that they've been permissioned to.</li></ul>	<ul style="list-style-type: none"><li>Use for day to day campaign managers who only require certain access or people managers that only oversee a portion of your business.</li></ul>
Contractor	<ul style="list-style-type: none"><li>Contractors have limited view access and can only access the specific Ad Accounts and Pages that they've been permissioned to.</li></ul>	<ul style="list-style-type: none"><li>Use for people that work for another company.</li></ul>



In addition to Business Manager roles, Admins can then assign Page and Ad Account specific roles

### Ad Account Roles

- Billing Admin
- Account Manager
- Campaign Manager
- Creative Manager
- Viewer

### Page Roles

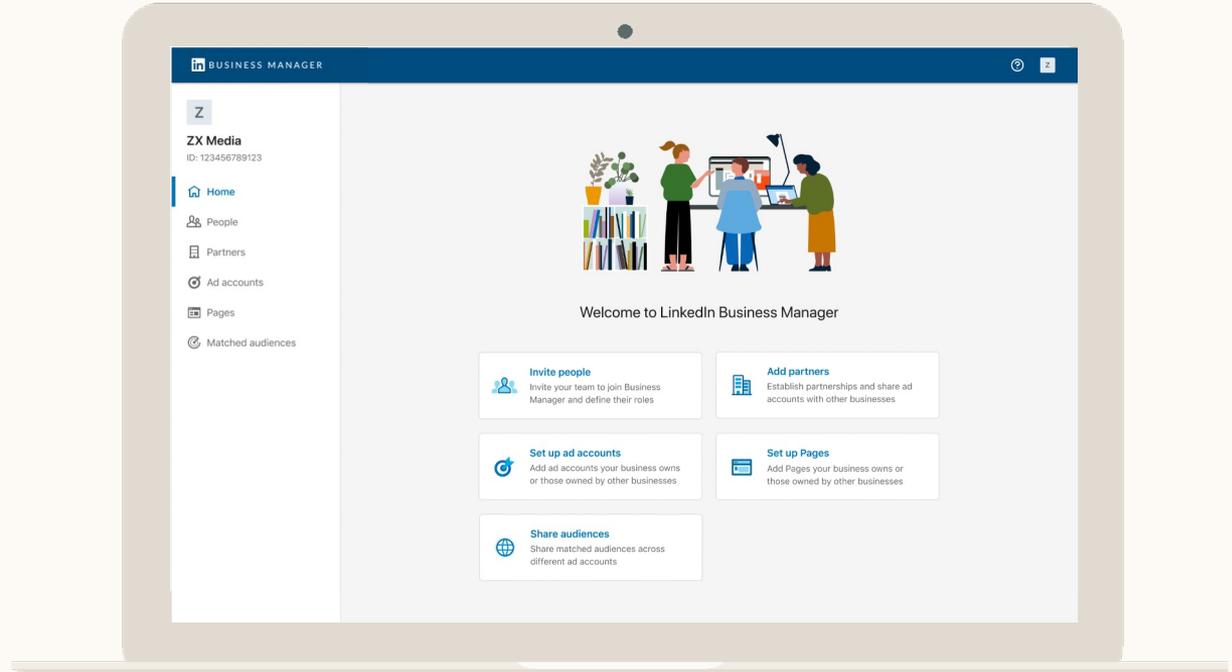
- Super Admin
- Content Admin
- Curator
- Analyst
- Sponsored Content Poster
- Lead Gen Form Manager
- Pipeline Builder

Definitions for these roles can be found within Business Manager or the LinkedIn Help Center ([Ad Account roles](#), [Page Admin Roles](#), [Paid Media Roles](#)).



# Onboarding Steps

- 1 Create your Business Manager
- 2 Invite Admins
- 3 Add Ad Accounts
- 4 Add Pages
- 5 Review Access to invite remaining users
- 6 Setup Partnerships

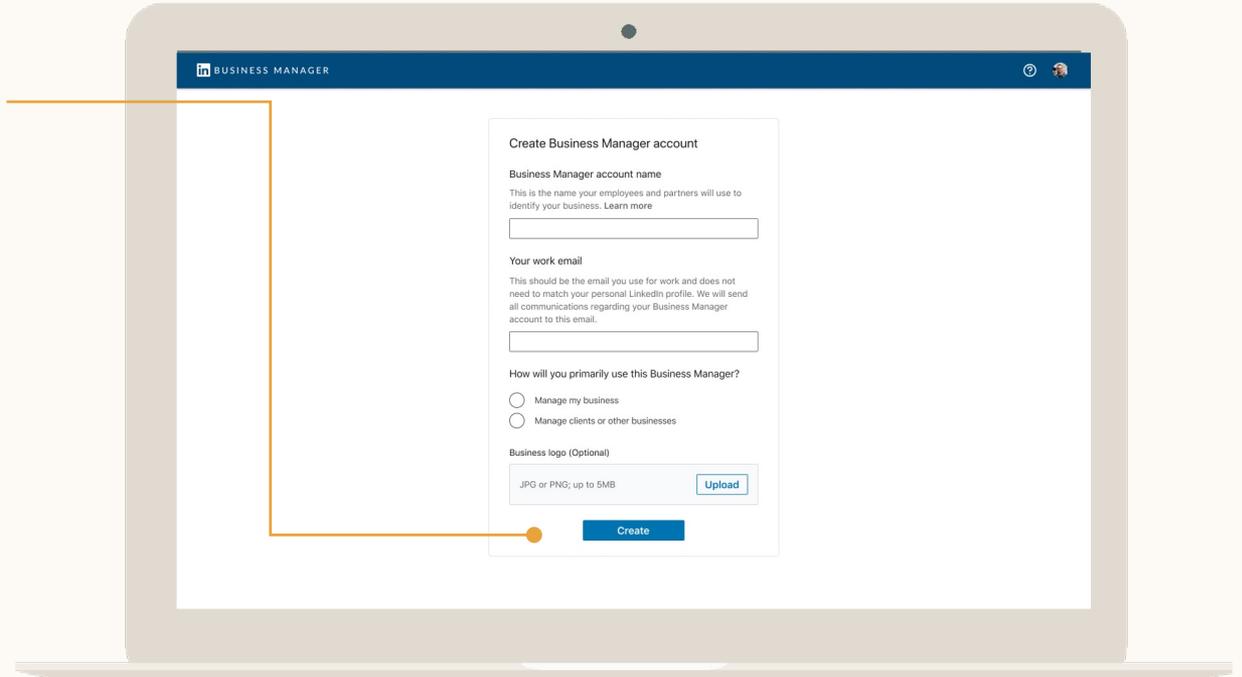




## Click Create to get started

Creation available from [LinkedIn Ads website](#)

We suggest incorporating Parent Company and Subsidiary/ Geo/ Business Unit into your Business Manager Name (e.g. LinkedIn North America Business Manager)



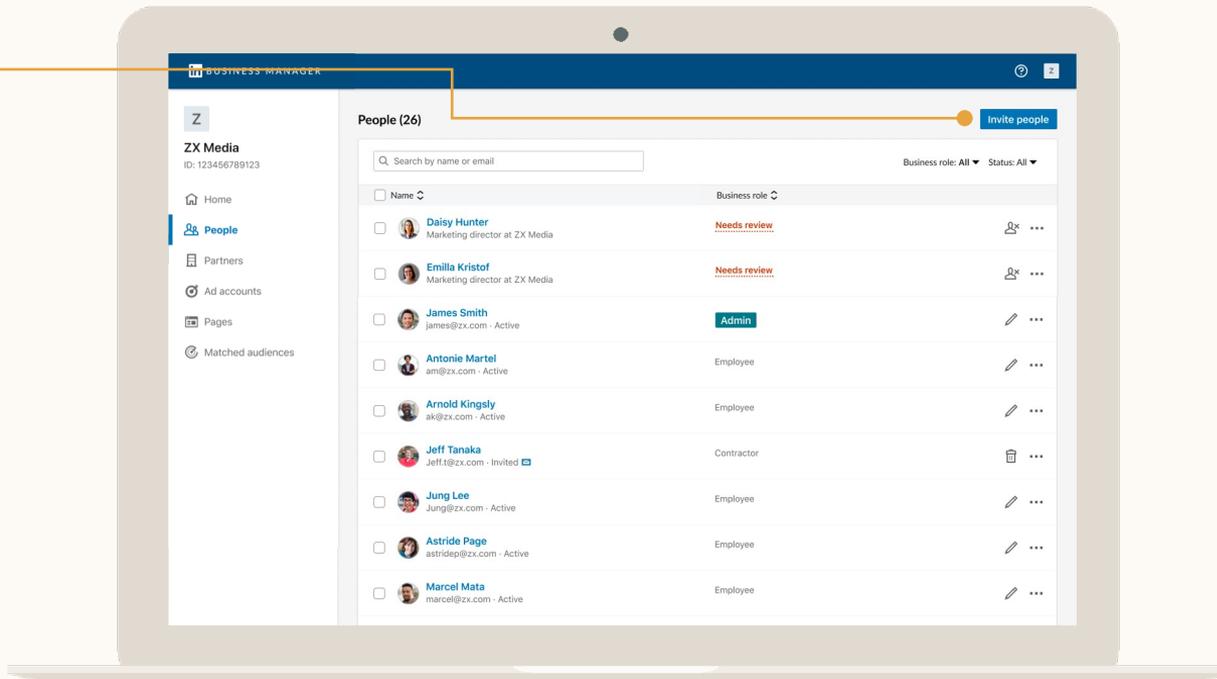


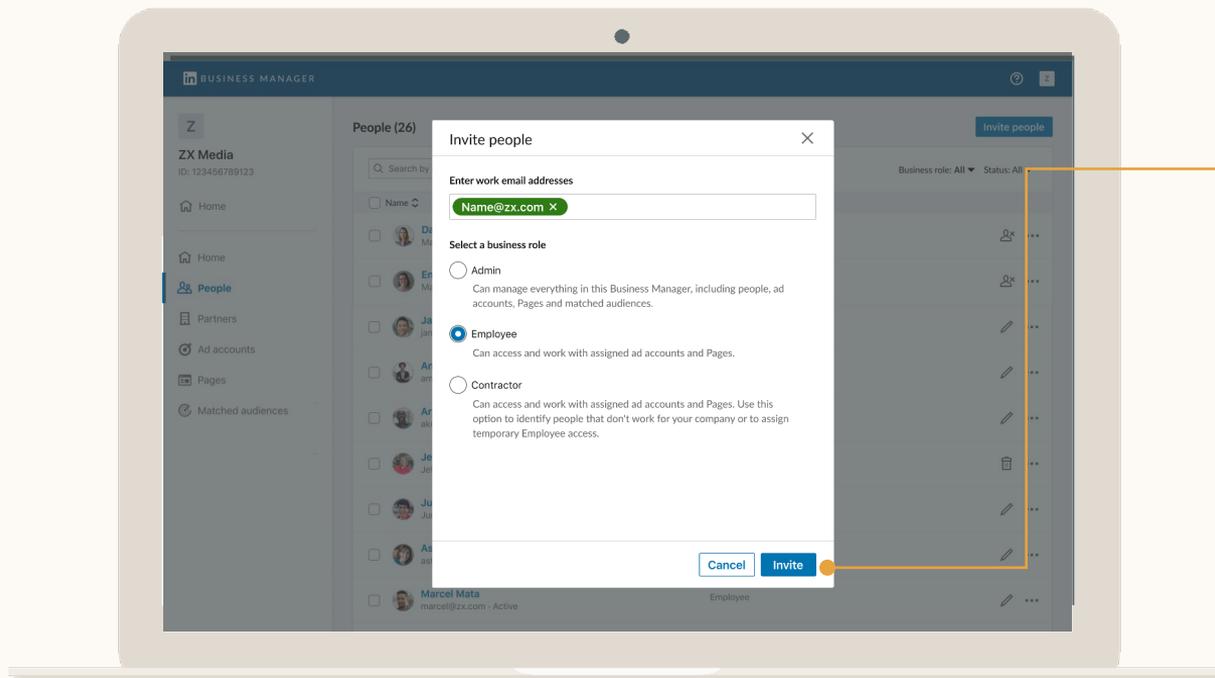
## Click Invite People, start with Admins

Invite people using their work emails. These emails don't need to be associated with their LinkedIn profiles.



**Tip:** Colleague can't find their invite? Click the Ellipsis next to their name and select *Resend*. You can send the email again or copy a personalized link for your colleague to follow.





## Next, Select their Role

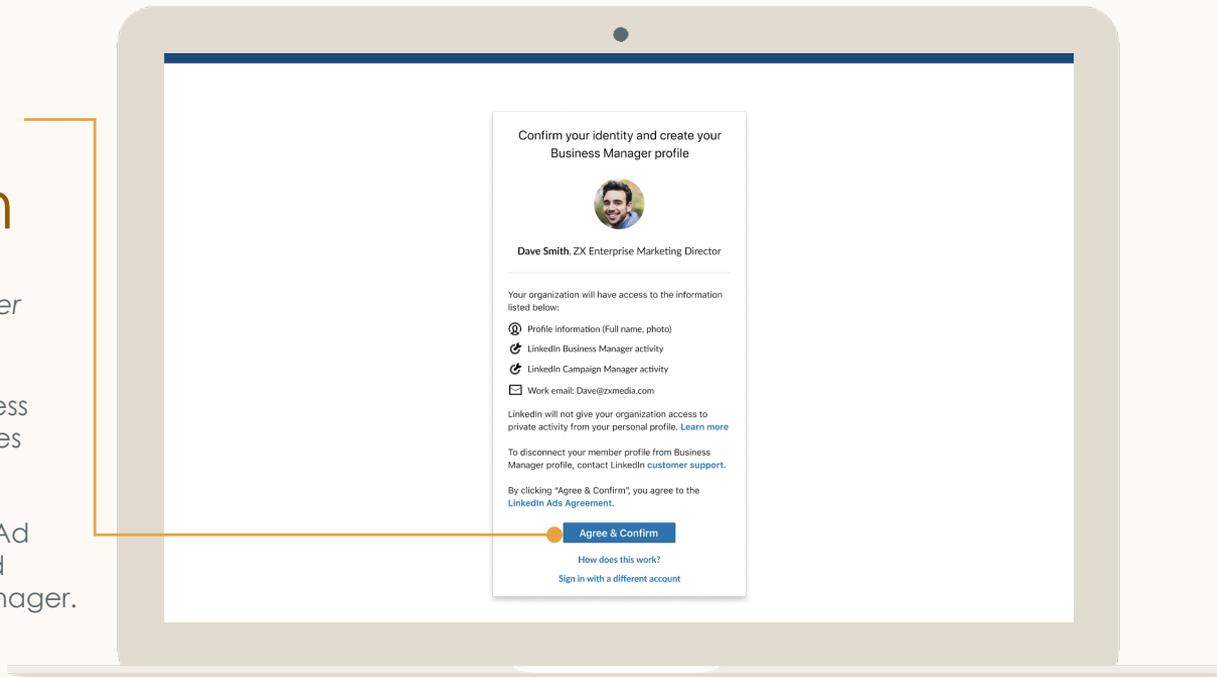
Add a comma in between emails to invite multiple people at once.

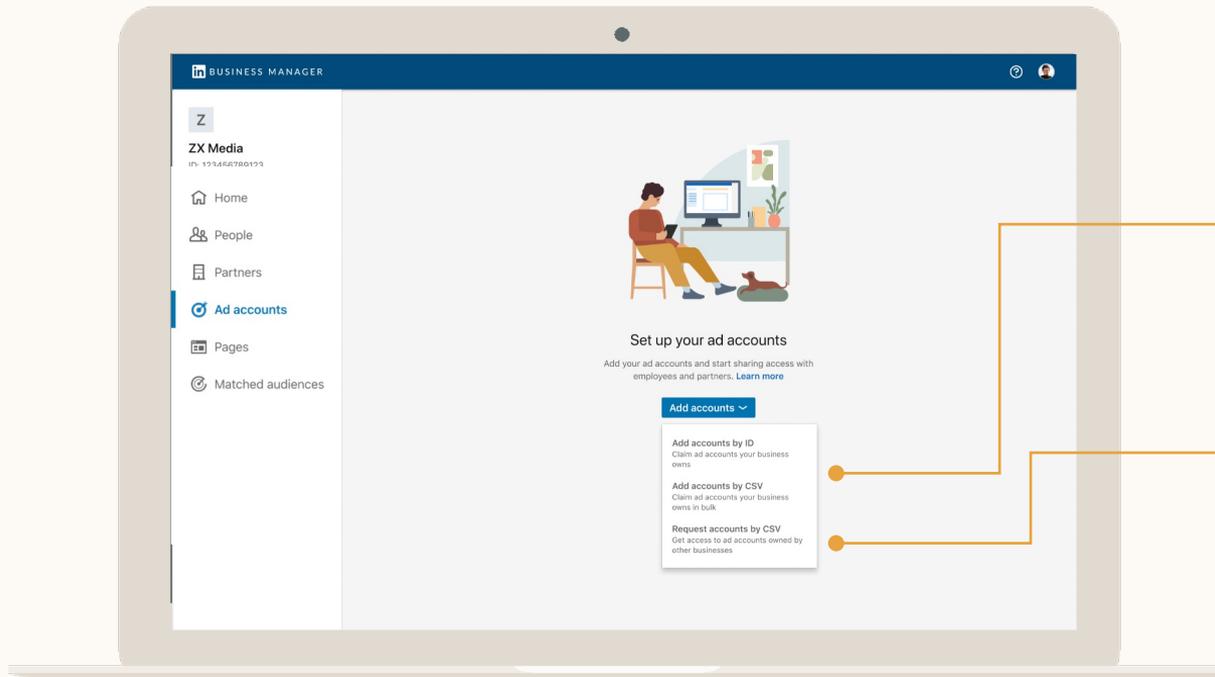
<b>Admin</b>	Can invite people, add Accounts & Pages, set up Partnerships, and access all Business Manager Accounts & Pages.
<b>Employee</b>	Can only access Accounts & Pages they've been assigned to.
<b>Contractor</b>	Can only access Accounts & Pages they've been assigned to. Use to differentiate from people that don't work for your company.



## People must accept an email invitation

- ✓ This creates a *Business Manager Profile* for that person.
- ✓ They will use it to access Business Manager Ad Accounts & Pages moving forward.
- ✓ They will retain access to any Ad Accounts and Pages they had access to prior to Business Manager.





## Click Add Accounts and Select Type

### Add Accounts by ID or CSV

Use this option if your business is the owner of the Ad Account. To get the best experience, we recommend the business responsible for billing be the owner.

### Request Access by CSV

Use this option if another business should be the owner of the Ad Account, and people from your business need access to it.



**Tip:** If you want access to an Ad Account of a business that has a Business Manager, don't use 'request access'. Have them claim the account first and share it to you using a Partnership.



## Option 1: Ownership

### Enter Ad Account IDs with Spaces Between Each

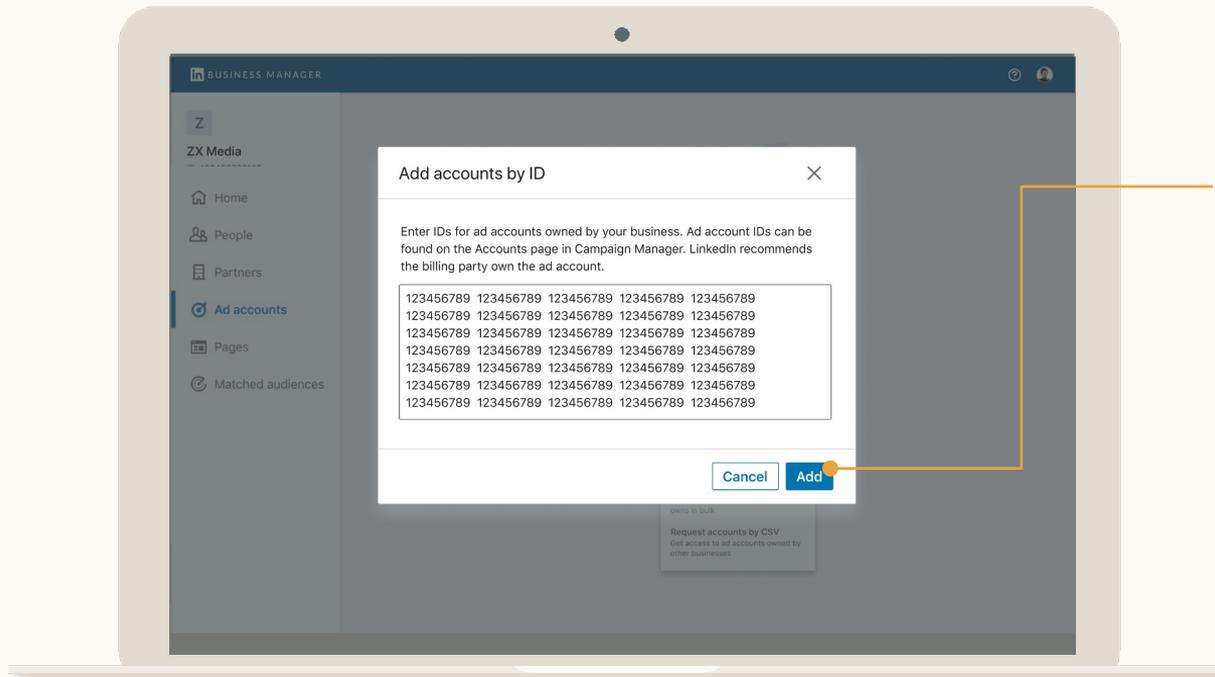
Ad Account IDs are 9-digit numerical IDs that can be found in the Accounts tab in [Campaign Manager](#). Start with active Ad Accounts, there's initially an 1,000 Ad Account limit.



From the previous screen, click *Add accounts by CSV* to download a template to add Accounts using CSV upload. You can add up to 200 at a time.



If the person adding the Account is an *Account Manager*, it'll automatically be approved. Otherwise, emails will be sent to *Account Managers* for approval.





## Option 2: Requesting Access

### When requesting access, indicate your role

You must use a CSV file and select the role your business needs. Mark an "X" under the desired role. If approved, that's the highest role you can assign your people on the Account.

If requesting Ad Account access, you can use this language to send to the Ad Account Manager about the request.



**Tip:** If the Ad Account belongs to another business that has Business Manager, don't use this option. Create a Business Manager Partnership first and have the business share Ad Account access to you. Use this option if the other business does NOT use Business Manager.

	A	B	C	D	E	F	G
1	Request ad accounts		Mark ONE cell with "X" to request the account role (Required)				
2	Ad account ID (required)	Ad account name (optional)	Billing admin and Account manager	Account manager	Campaign manager	Creative manager	Viewer
3	123436789 (example)	Ad account name (example)					X
4	123436789 (example)	Ad account name (example)			X		
5							
6							
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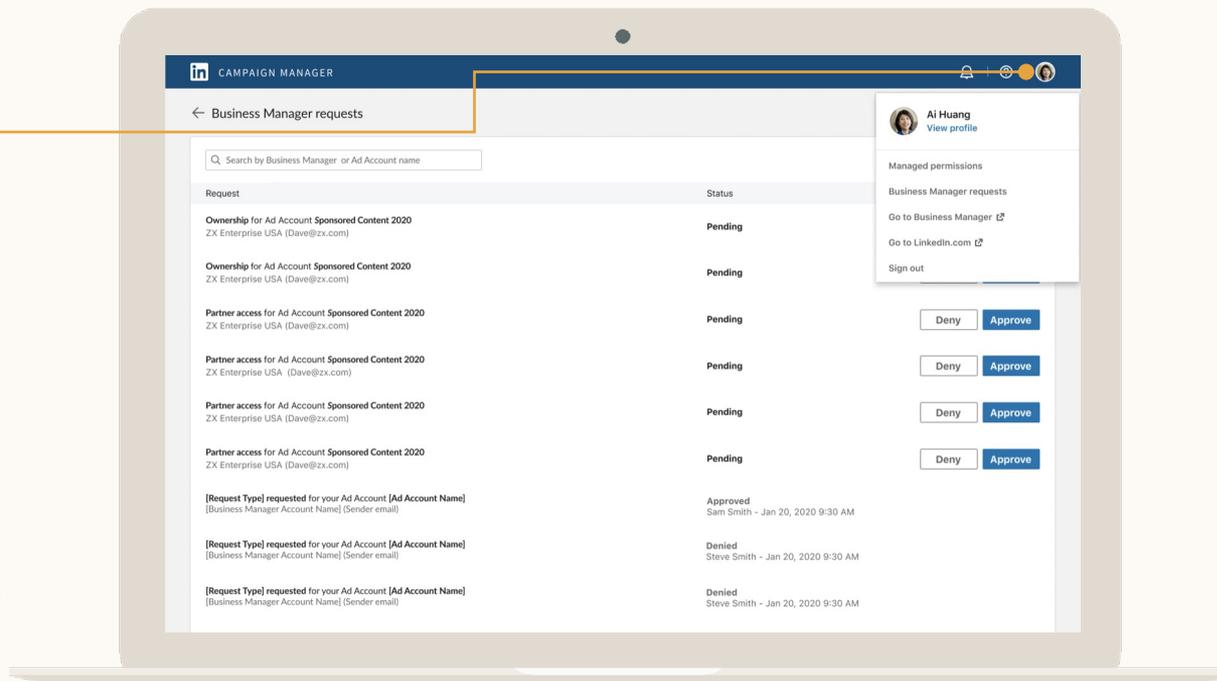


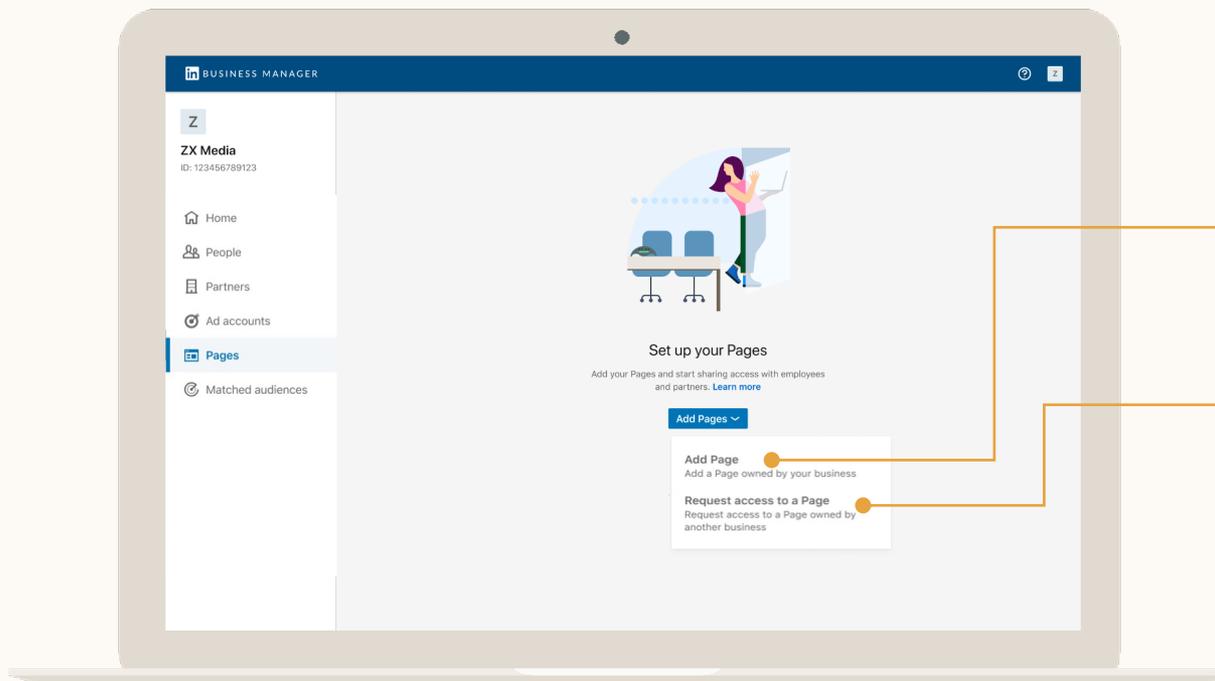
## Received a Request?

Account Managers can approve the request in Campaign Manager by clicking their profile picture in the upper right corner and clicking *Business Manager Requests*.



**Tip:** If you know the Account Managers on the Ad Account, send them a heads-up email. There is a drafted email in this guide's [resource section](#)!





## Click Add Pages and Select Type

### Add Page

Use this option if the Page belongs to your company. You can add your Business Manager people to this Page as well as share Page access to another Business.

### Request to a Page

Use this option if it's another businesses Page and they don't have their own Business Manager. If they do, have them share Page access with you via a Business Manager Partnership.



**Important:** Before you can request to own a Page, an existing Page Super Admin must have already been invited to your Business Manager.



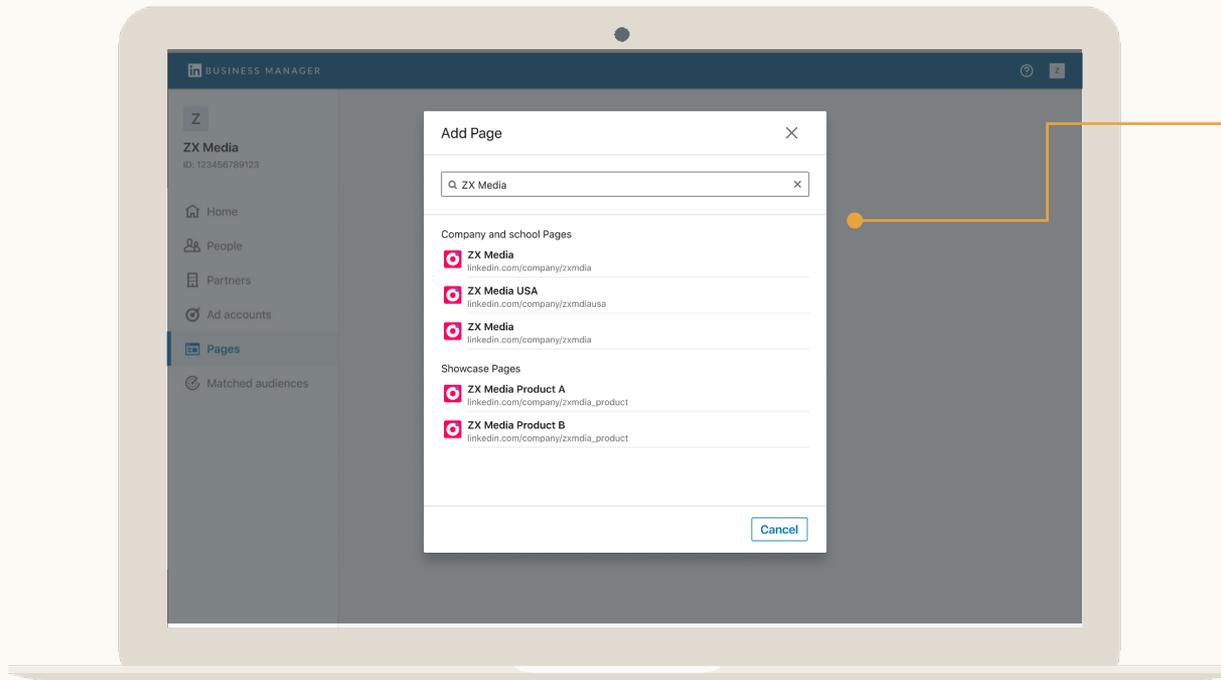
## Adding Pages: Option 1, owning a Page



### Option 1: You own the Page

Search for the Page you want to add

You must first add a *Page Super Admin* to your Business Manager, before you can send an ownership request. After *Page Super Admins* approve the request, you can add people from your Business Manager to that Page.





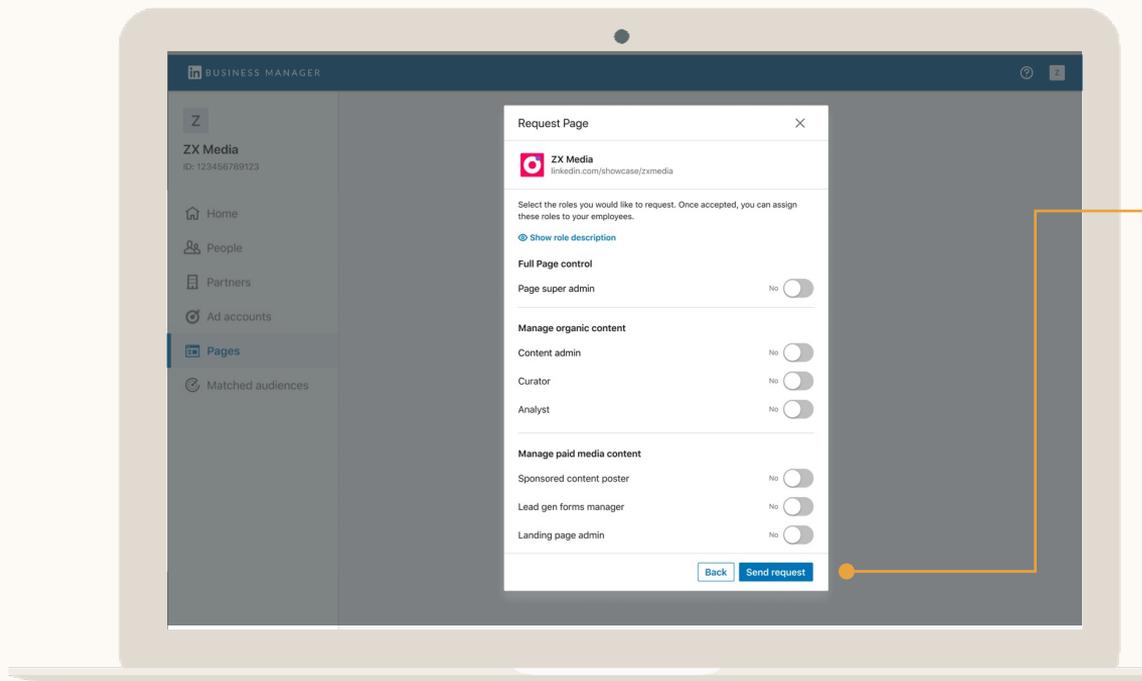
### Option 2: Requesting Access

# If you don't own the Page, request access

When *Requesting Access*, you must select Page roles you need. [Learn more.](#)

Use this option if you're advertising for another company and they don't have a Business Manager. If the company has a Business Manager, have them share Page access with you through a Partnership.

If requesting Page access, you can [use this language](#) to send to the Page Super Admin about the request.



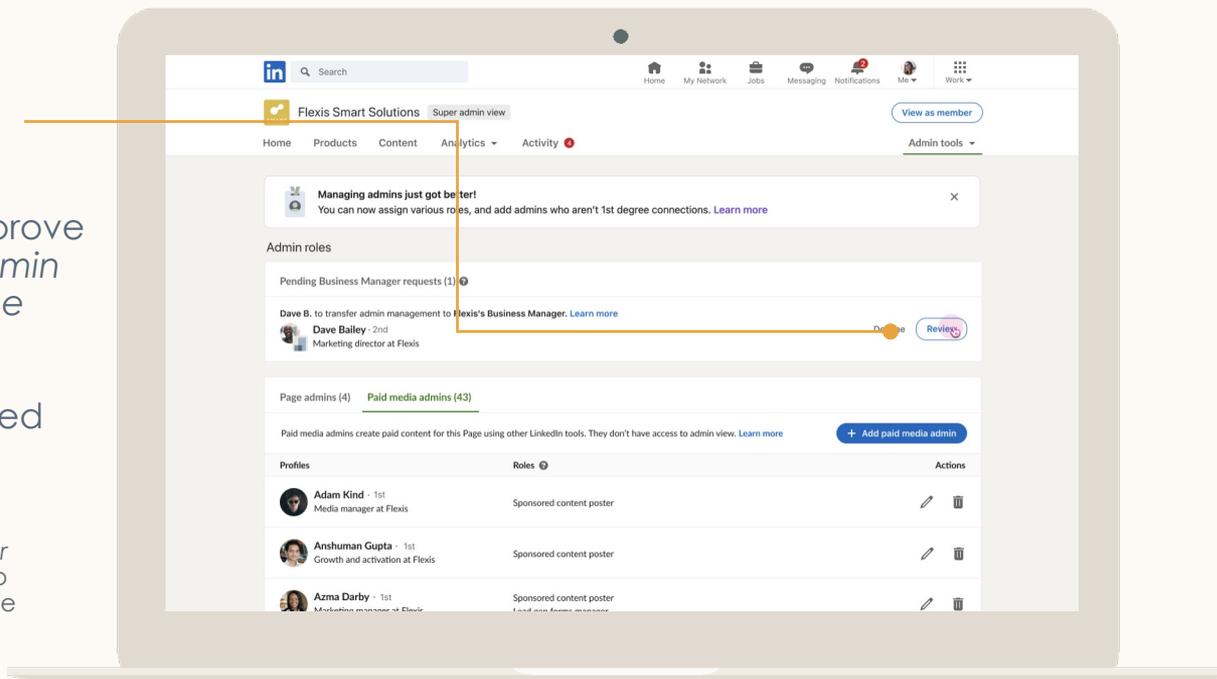


## Received a Request?

*Page Super Admins* can approve requests by selecting the *Admin Tools* dropdown and *Manage Admins*. If it's an ownership request, only the *Super Admins* that have been invited to Business Manager can approve.



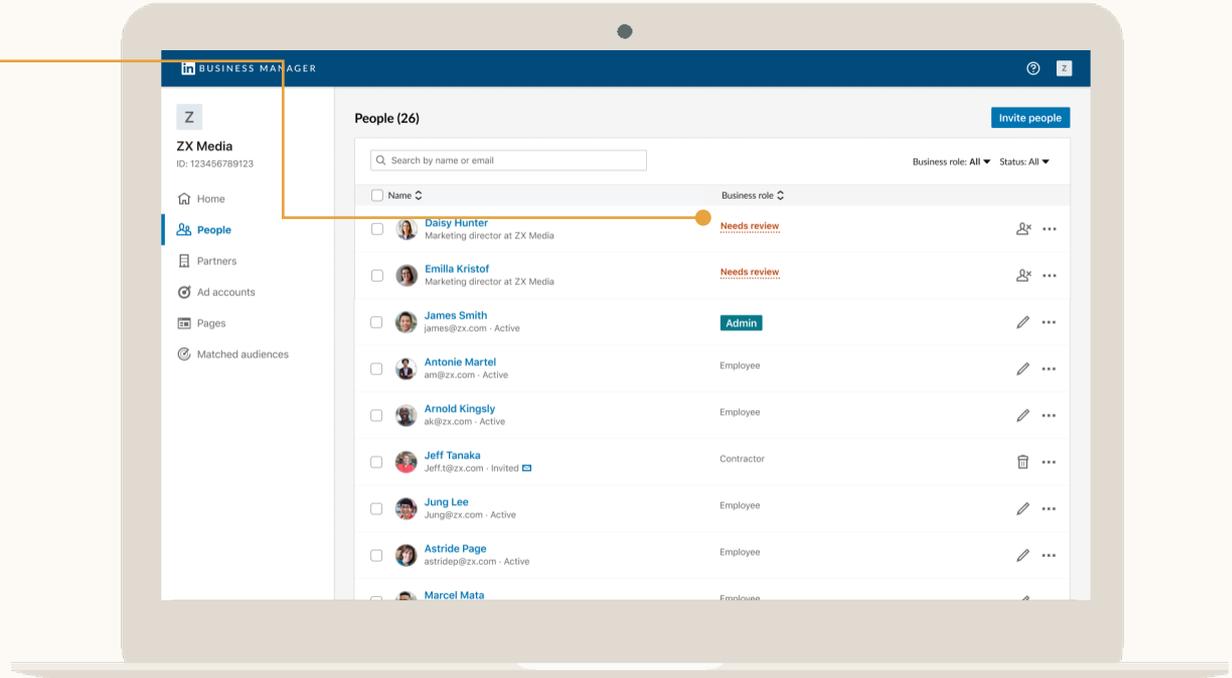
**Tip:** If you know the *Page Super Admins*, send them a heads-up email, as this will be the first time they have seen this request.





Click the person that needs review

The Business Role “Needs review” indicates the people that had access to the Ad Accounts and Pages before you added them to Business Manager, but haven’t been invited to Business Manager yet.

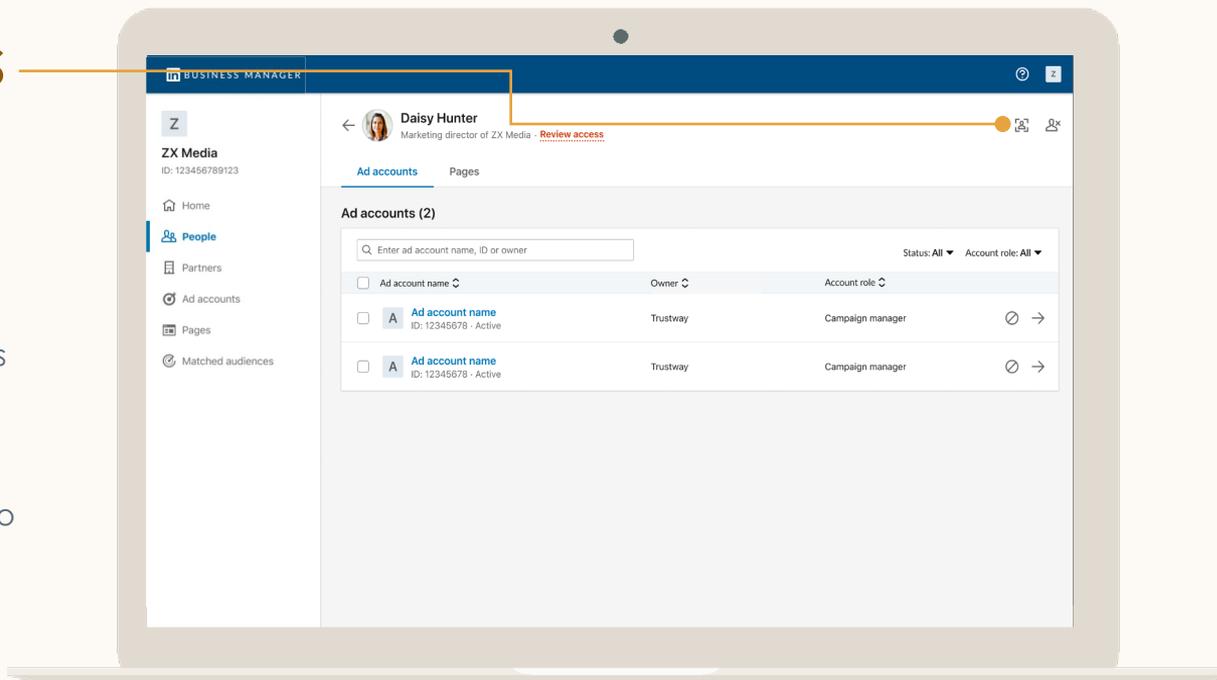


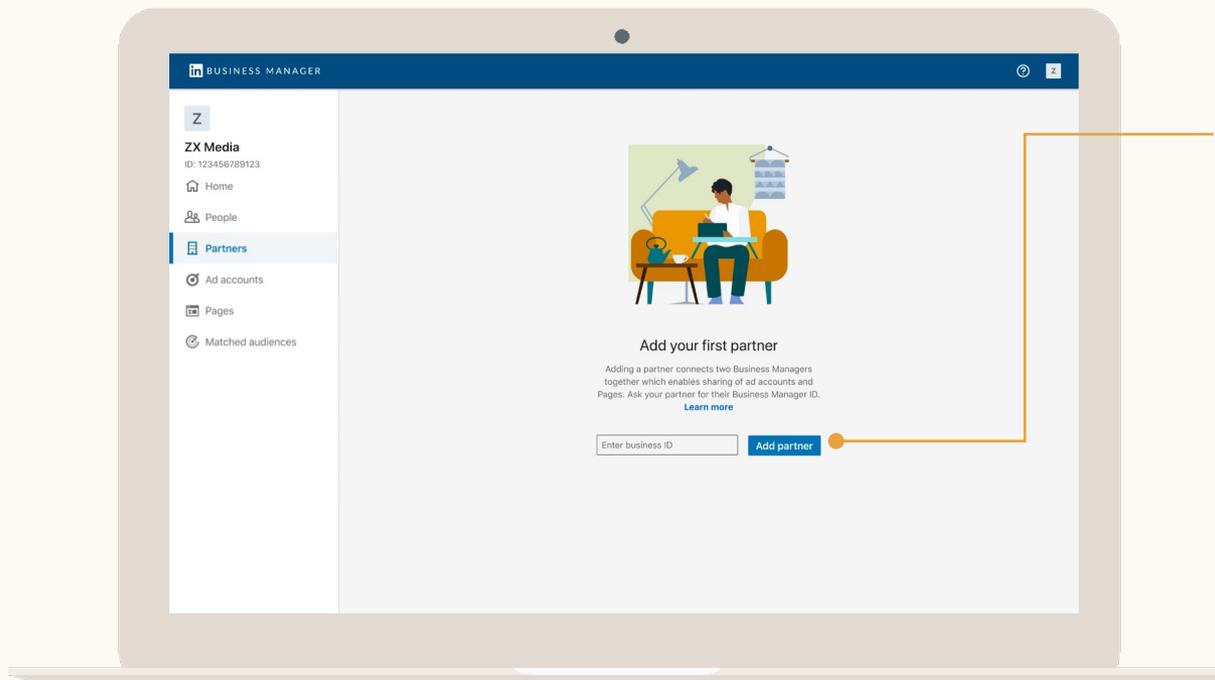


## Review Access

View which Ad Accounts and Pages someone can access.

1. Existing Employees: Invite them to Business Manager.
1. Former Employees: Remove them so that they lose access to all your Accounts & Pages.
1. Other companies: (eg agencies) have them create their own Business Manager so you can share Ad Account and Page access with them through a Partnership.





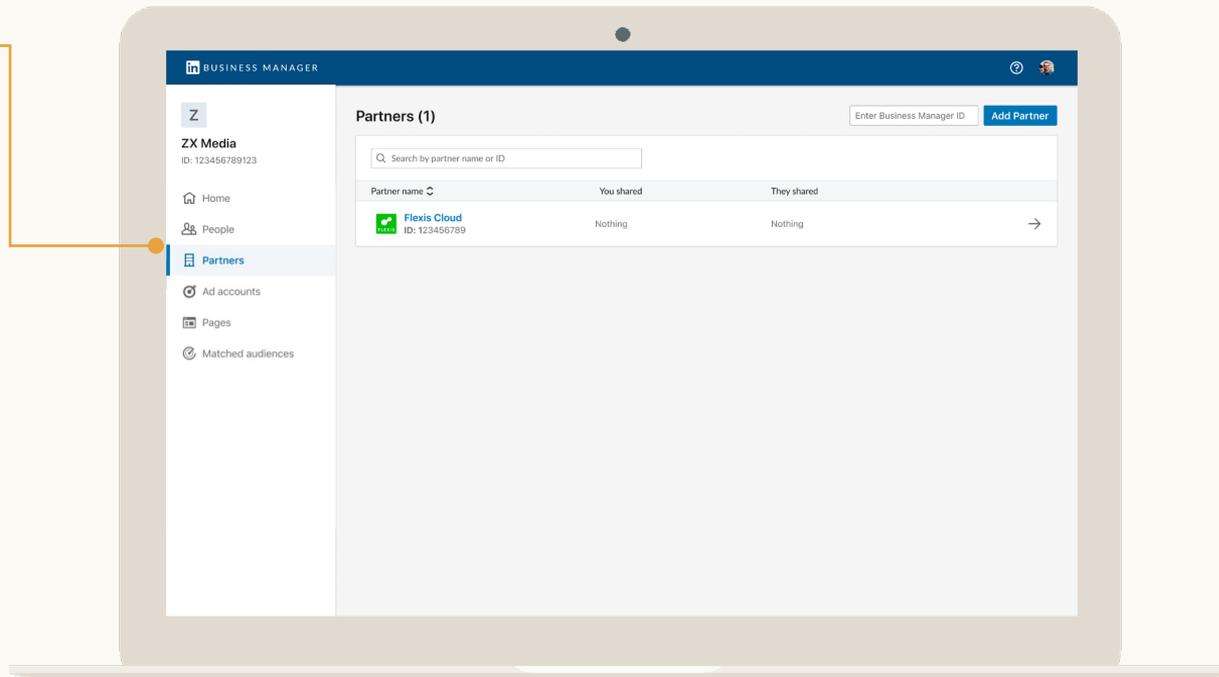
## Admins enter the Partner's Business Manager ID

-  Business Manager IDs can be found under the Business Manager name.
-  Both businesses must have Business Managers to set up a Business Manager Partnership.
-  Ad Accounts and Pages are never automatically shared with a Partner.
-  Only *Admins* can add Partners.



## View Your Partners

Click *Partners* to view.  
See what you've shared  
with them and what  
they've shared with you.

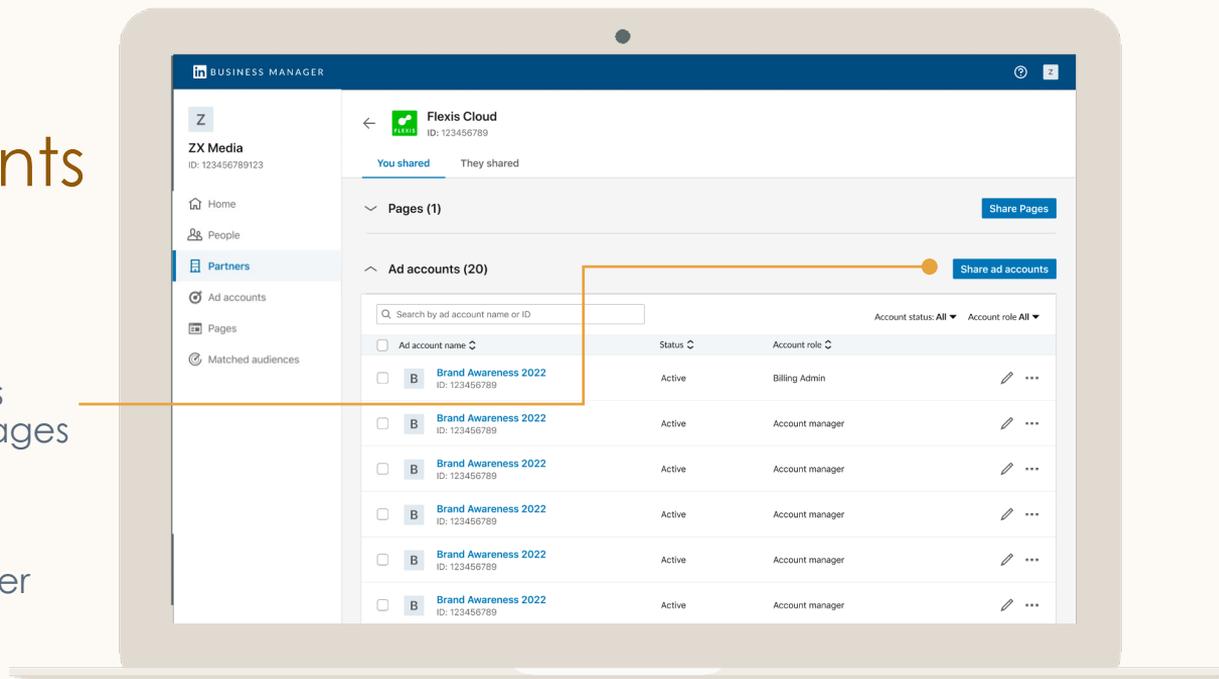




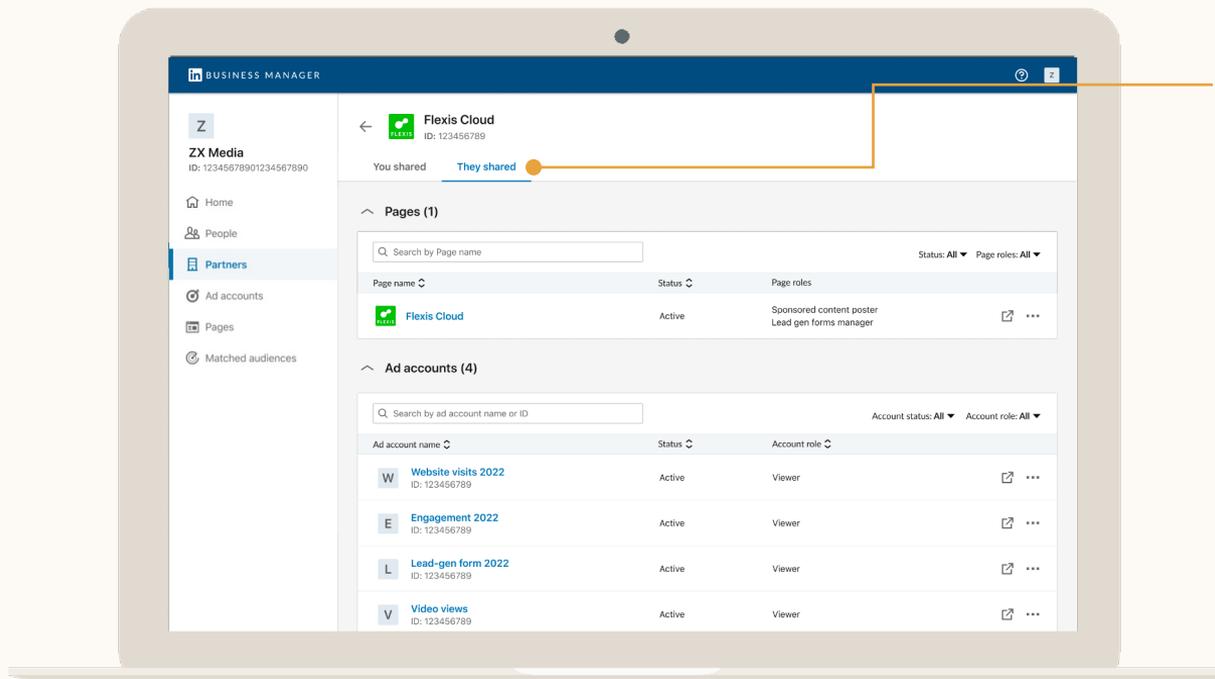
## Click on a Partner to start sharing Accounts & Pages

Click *Share Ad Accounts* to select which of your Business Manager Ad Accounts or Pages to share with the Partner.

Partners cannot reshare Ad Accounts or Pages to another business.







## Partners can then Share Accounts & Pages with you

By clicking the *They Shared* tab from the Partner Profile page, you can see the Ad Accounts and Pages that your Partner shared with you.

Your *Admins* can now add people to those Ad Accounts and Pages at the roles specified by your Partner.



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# Using Business Manager



# Business Manager Use Case Scenarios

- 1 People Management
- 2 Ad Account Management
- 3 Page Management
- 4 Partner Management
- 5 Audience Sharing



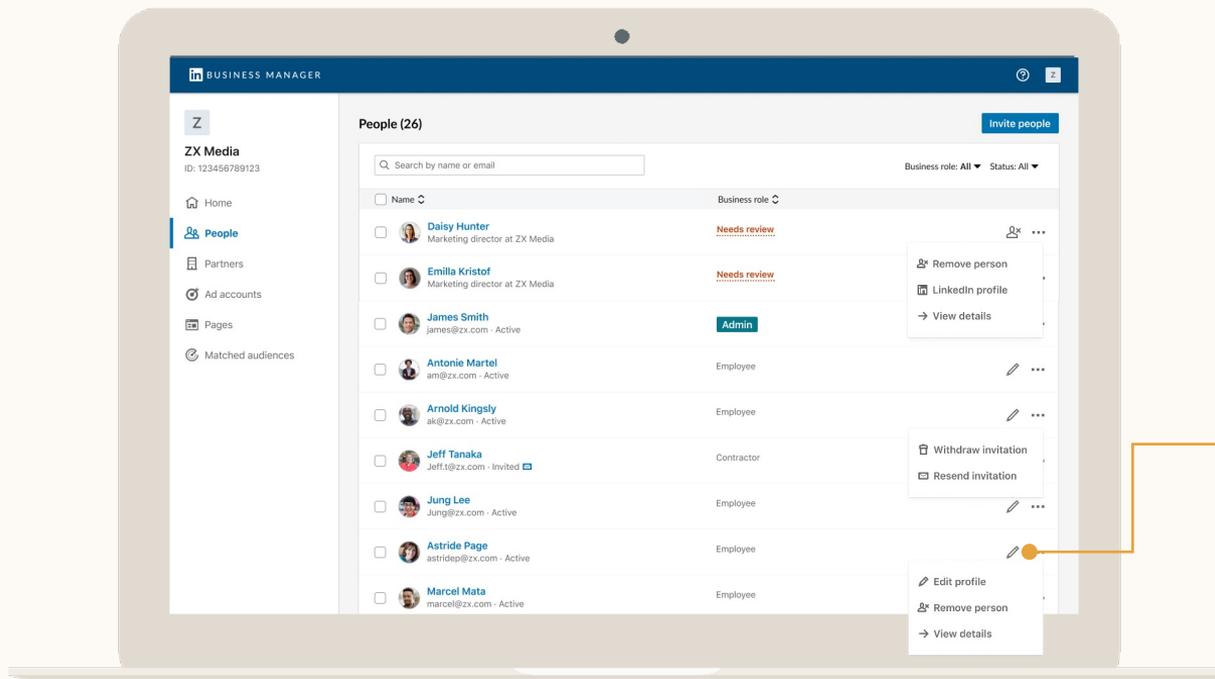
# People Management

- Adjust Business Manager roles including employee removal
- Audit an individual's access across Accounts and Pages
- Add or remove someone from many Accounts or Pages at once



# People management allows you to easily control access across Ad Accounts and Pages

	Use Case	Benefit
Quickly Add New Users to Multiple Ad Accounts & Pages	<ul style="list-style-type: none"><li>You have a new hire who needs to quickly be onboarded to many LinkedIn Ad Accounts and Pages.</li></ul>	<ul style="list-style-type: none"><li>Save time by adding your new user to multiple accounts and pages at once.</li></ul>
Audit Access	<ul style="list-style-type: none"><li>Your account teams have reshuffled and you need to review your employee's access to specific Ad Accounts and Pages.</li></ul>	<ul style="list-style-type: none"><li>Spend less time on administrative tasks by viewing each user's individual access across Ad Accounts and Pages and quickly reassigning as needed.</li></ul>
Revoke access across ad accounts and pages	<ul style="list-style-type: none"><li>An employee has left your company and you need to remove them from many Ad Accounts and Pages.</li></ul>	<ul style="list-style-type: none"><li>Maintain security by revoking former employees' access in a few clicks across all your Ad Accounts and Pages.</li></ul>



## Manage Business Manager Roles

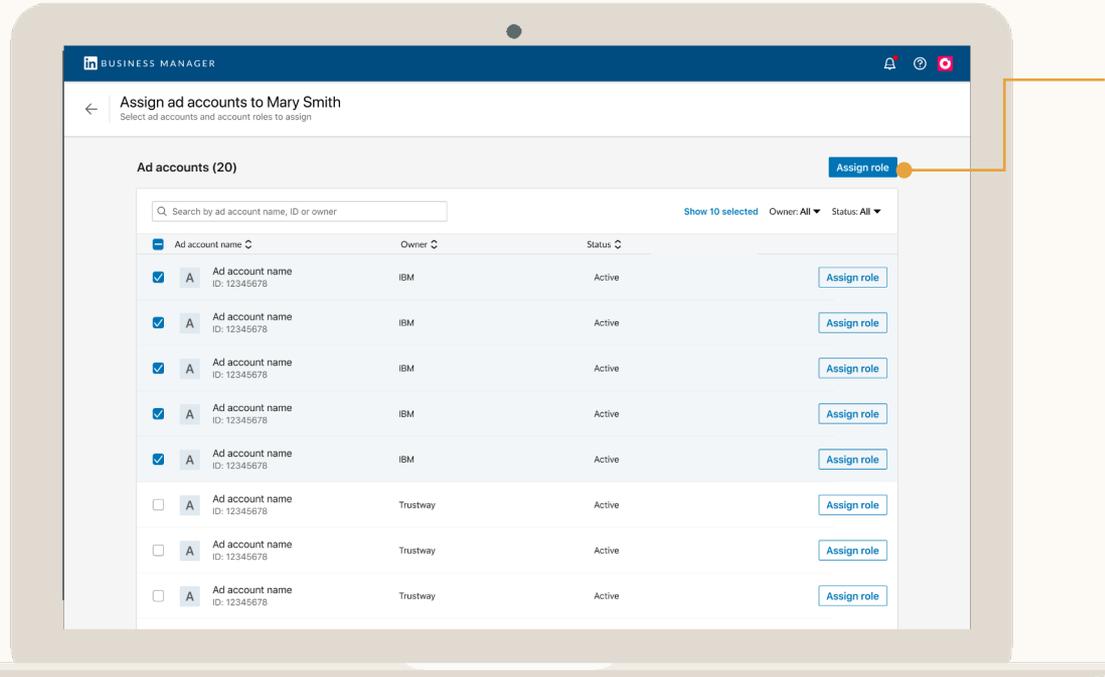
*Admins* can select the checkbox next to people to remove them. If removed, they'll lose access to Business Manager and any Ad Accounts and Pages they've been assigned.

By clicking the pencil icon, you can edit someone's Role or remove them.



**Tip:** Colleague can't find their invite? Click the Ellipsis next to their name and select *Resend*. You can send the email again or copy a personalized link for your colleague to follow.





Click the user,  
Select Accounts  
or Pages and  
Click Assign role

- *Business Manager Admins* can manage access to all assets.
- *Employees or Contractors* with the *Account Manager* role on specific Ad Accounts can manage access to those Ad Accounts.
- *Employees or Contractors* with the *Page Super Admin* role on specific Pages can manage access to those Pages.





# Ad Account Management

- Grant multiple people access to Ad Accounts
- Update multiple people's roles in Ad Accounts
- Remove people from Ad Accounts



# Own your Ad Accounts & get access to ones owned by other Business Managers

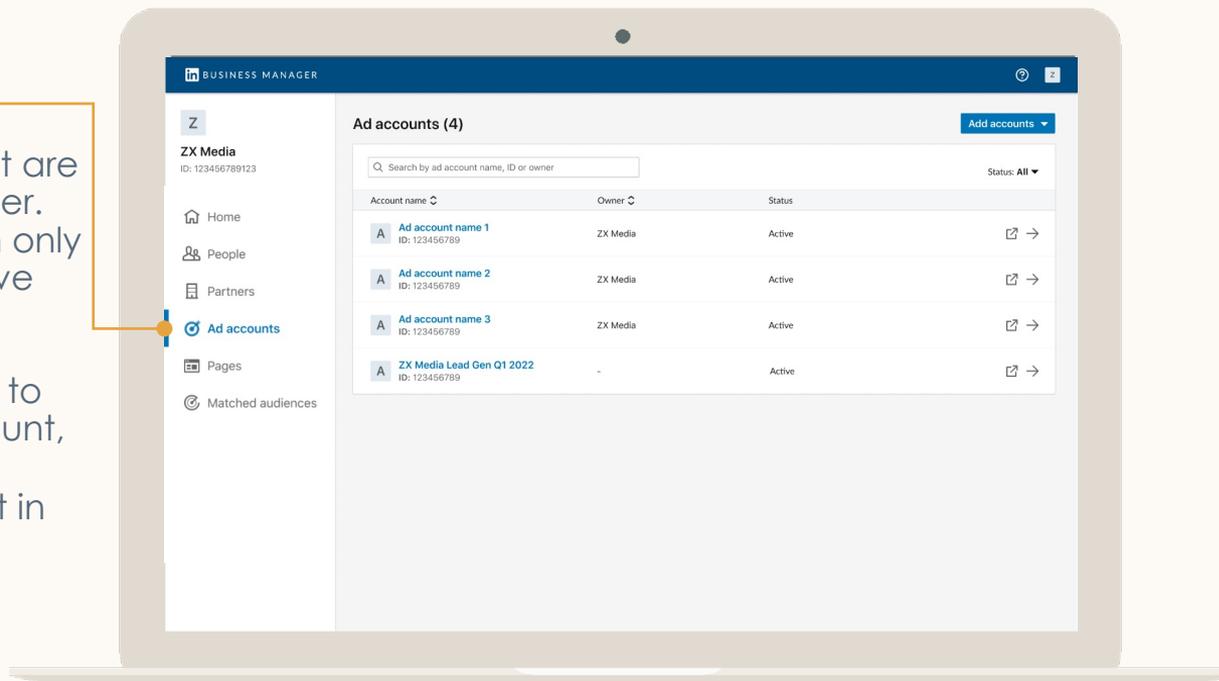
	Feature	Benefit
You are active across multiple Ad Accounts	<ul style="list-style-type: none"><li>You can now track all your organization's Ad Accounts from one central location.</li></ul>	<ul style="list-style-type: none"><li>Increase your visibility across your organization.</li></ul>
You work with other businesses	<ul style="list-style-type: none"><li>You can provide other Business Managers access to your Ad Accounts as well as manage their people's level of access.</li></ul>	<ul style="list-style-type: none"><li>Simplify how you work with other organizations like agencies across your Ad Accounts.</li></ul>
You manage large marketing teams	<ul style="list-style-type: none"><li>Manage multiple people's access to an Ad Account at once or add/remove people.</li></ul>	<ul style="list-style-type: none"><li>Keep track of who has access to your Ad Accounts to promote account governance.</li></ul>

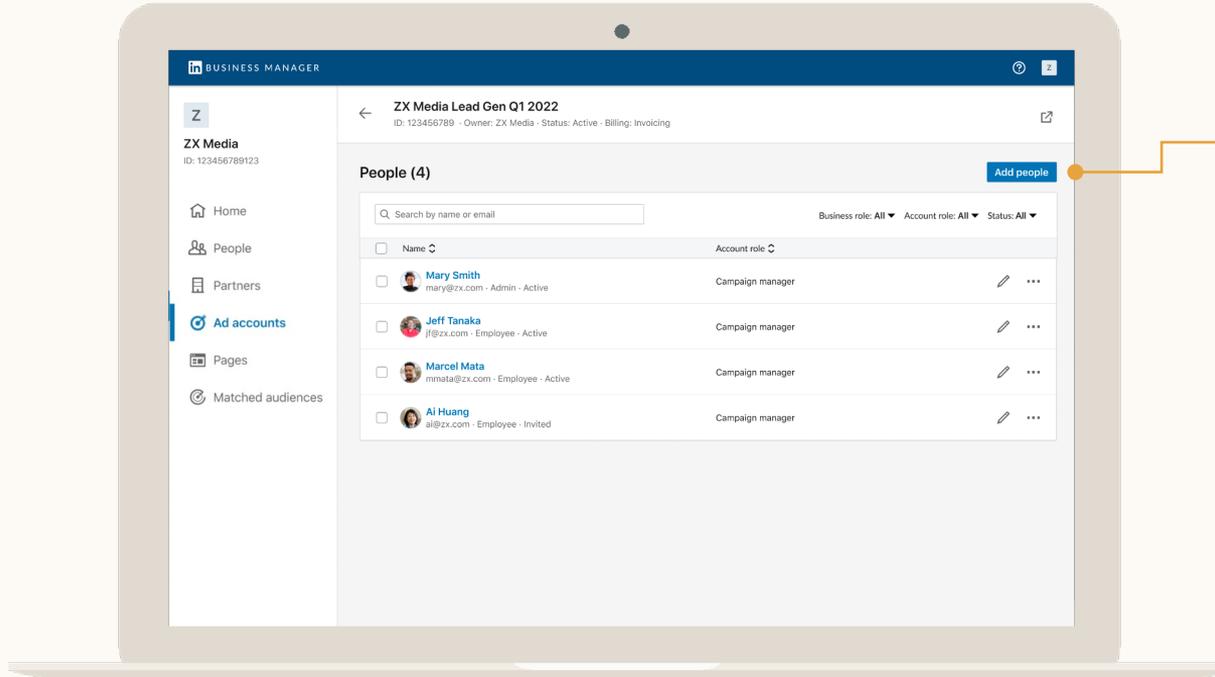


## View Ad Accounts

See all the Ad Accounts that are part of your Business Manager. Employees/Contractors can only access Accounts that they've been assigned to.

Click on the right-side arrow to add People to the Ad Account, view Ad Account details, or navigate to the Ad Account in Campaign Manager.





## Click *Add People*

Once an Ad Account is added you can use Business Manager to easily manage access.



### **Admins**

Can manage access to all Ad Accounts that are part of their Business Manager.



### **Employees / Contractors**

Can only manage access to Ad Accounts in which they have the *Account Manager* role.

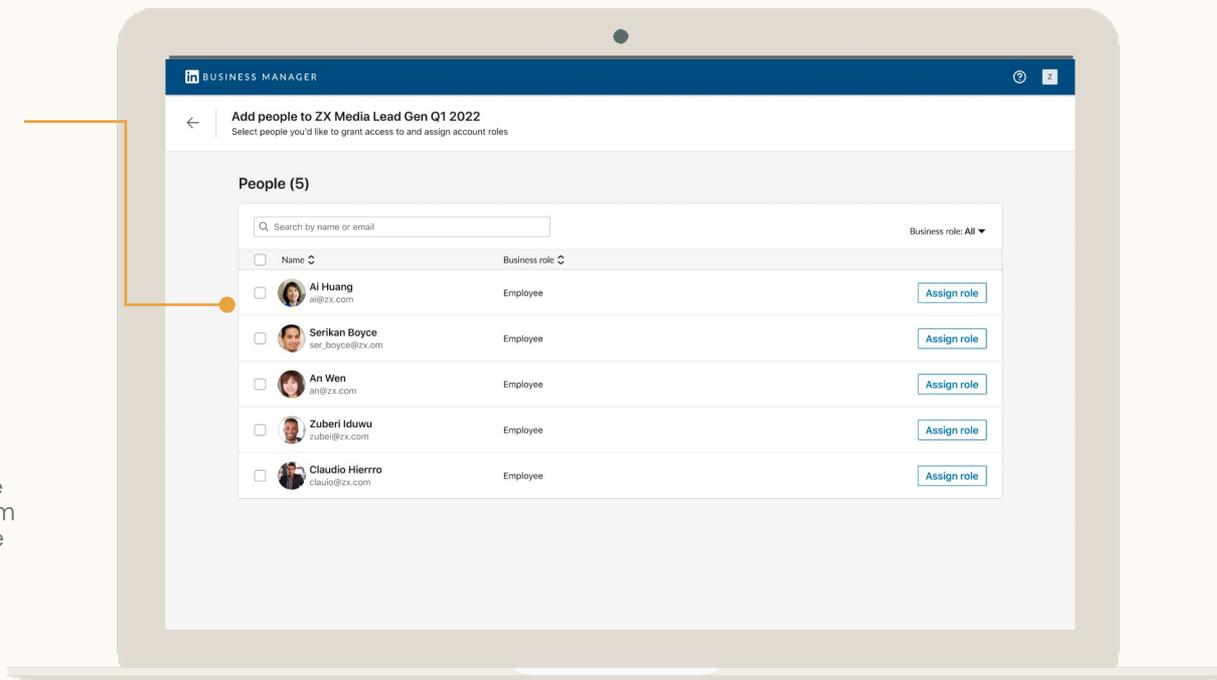


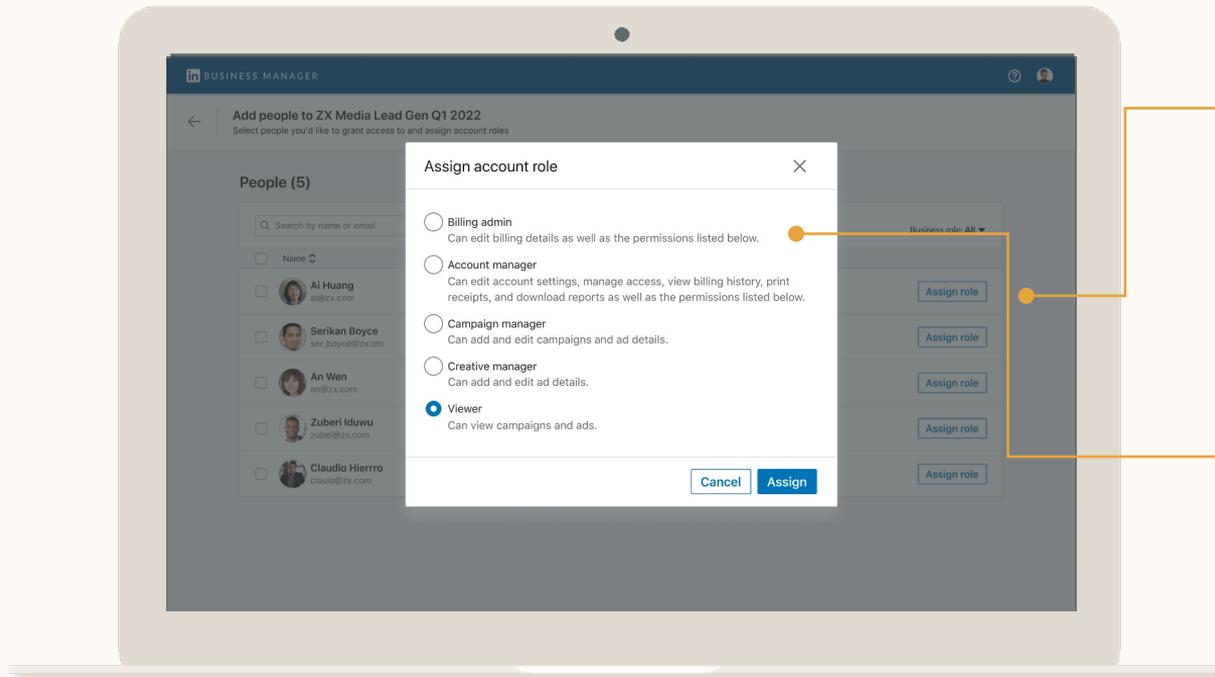
## Select People to Add

You can see all the People that are part of your Business Manager and select one or many to add to the Account.



**Tip:** If assigning multiple people the same role, select all of them at once and click *Assign* at the top right of the table.





## Click Assign Role and Select the Role

Choose the role the people should have on this Ad Account. Learn more about [Ad Account Roles](#).



### Billing Admins Considerations

- You can only have one Billing Admin on an Ad Account.
- Accounts that buy ads with Insertion Orders do not have Billing Admins.
- If your Business Manager has Partner access to an Ad Account below the Billing Admin level, it will be disabled.

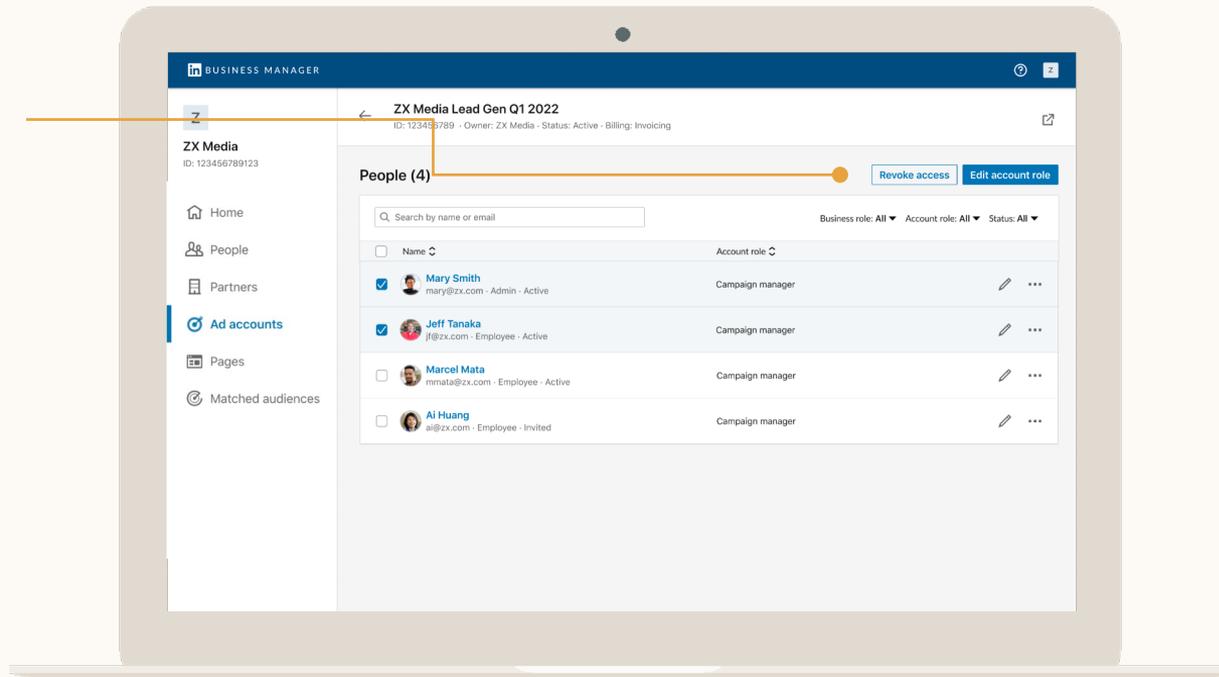


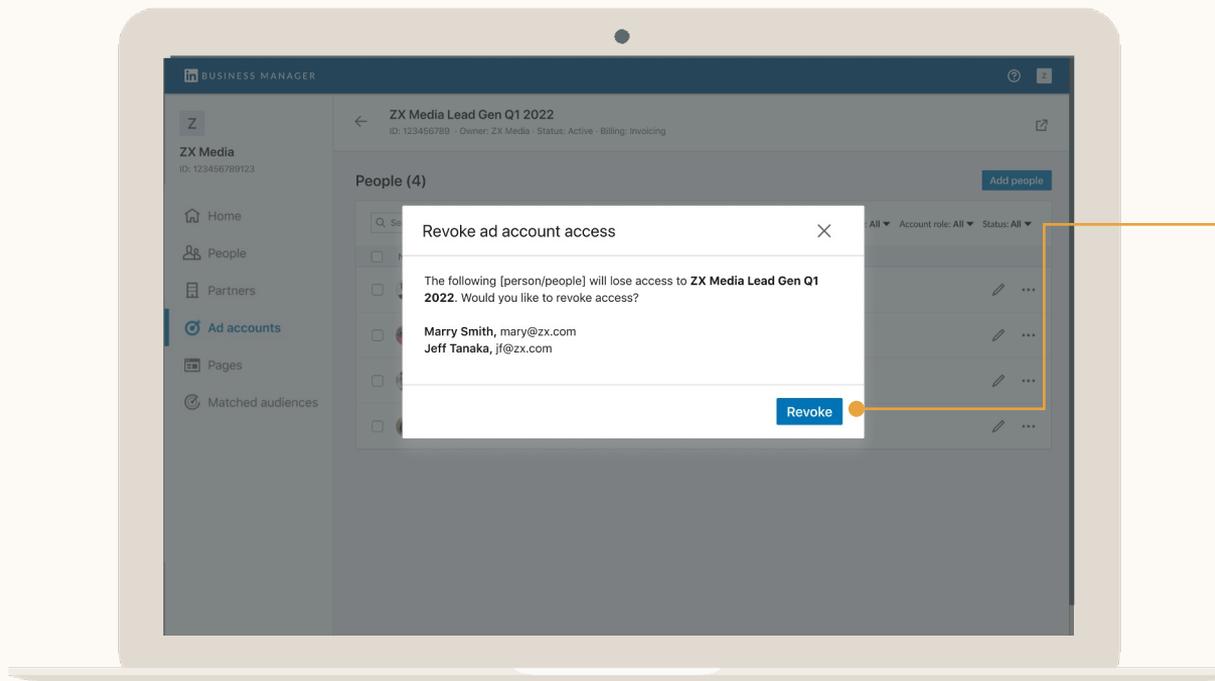
## Update People's Roles

To update multiple people's roles, select them from the Ad Account profile page and click *Edit account role*. If you only need to update one person, you can click the Ellipsis on the right and select *Edit Account Role*.



**Tip:** When updating multiple people's roles at once, you must change them all to the same role





## Remove People from Accounts

If you need to remove multiple people, select them from the Ad Account profile page and click *Revoke Access* in the upper right hand corner. To remove one person, you can click the ellipsis and select *Revoke Access*.

They will immediately lose access to the Ad Account, but still be part of your Business Manager.



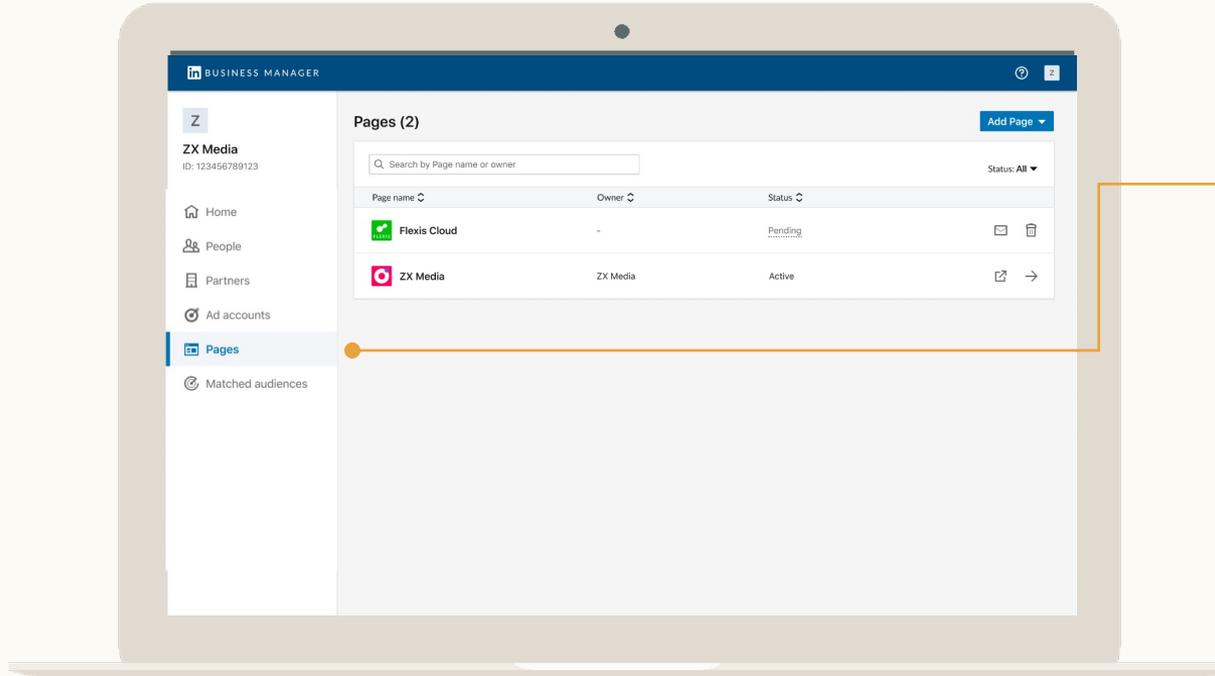
# Page Management

- Grant multiple people access to Pages
- Update multiple people's roles to Pages
- Remove people from Pages



# Own your Pages & get access to ones owned by other Business Managers

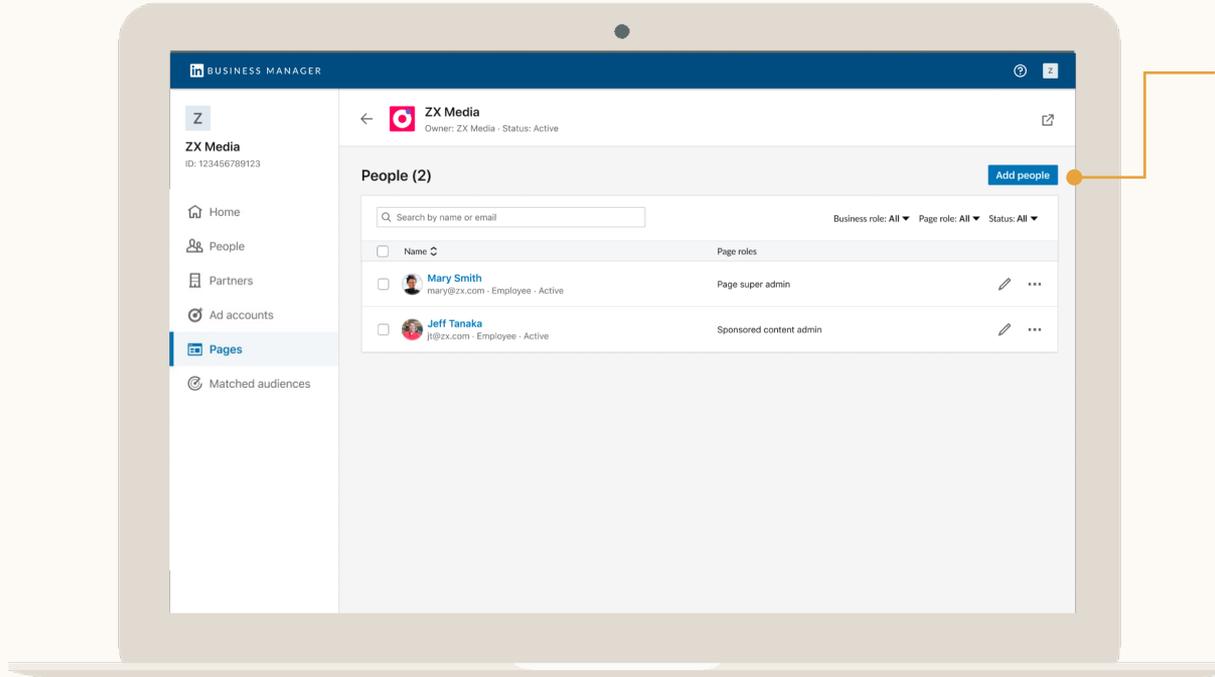
	Feature	Benefit
You are active across multiple Pages	<ul style="list-style-type: none"><li>You can now permission people across multiple Pages at once.</li></ul>	<ul style="list-style-type: none"><li>Spend less time on administrative tasks.</li></ul>
You work with other businesses	<ul style="list-style-type: none"><li>You can provide other Business Managers access to your Pages as well as manage their people's level of access.</li></ul>	<ul style="list-style-type: none"><li>Simplify how you work with other organizations like agencies across your Pages.</li></ul>
You manage large marketing teams	<ul style="list-style-type: none"><li>Manage multiple people's access to a Page at once or add/remove people.</li></ul>	<ul style="list-style-type: none"><li>Keep track of who has access to your pages to promote page governance.</li></ul>



## View Pages

From the Pages table in Business Manager, you can see all the Pages that are part of that Business Manager.

Click the right-side arrow to manage access on the Page or to go to the Page directly.



## Go to the Page and Click Add People

Once a Page is part of your Business Manager, you can easily manage Page access.

*Business Manager Admins* can manage Page access across all Pages from Business Manager, while *Page Super Admins* with the *Business Manager Employee* role can manage access for all Pages for which they're a *Page Super Admin*.

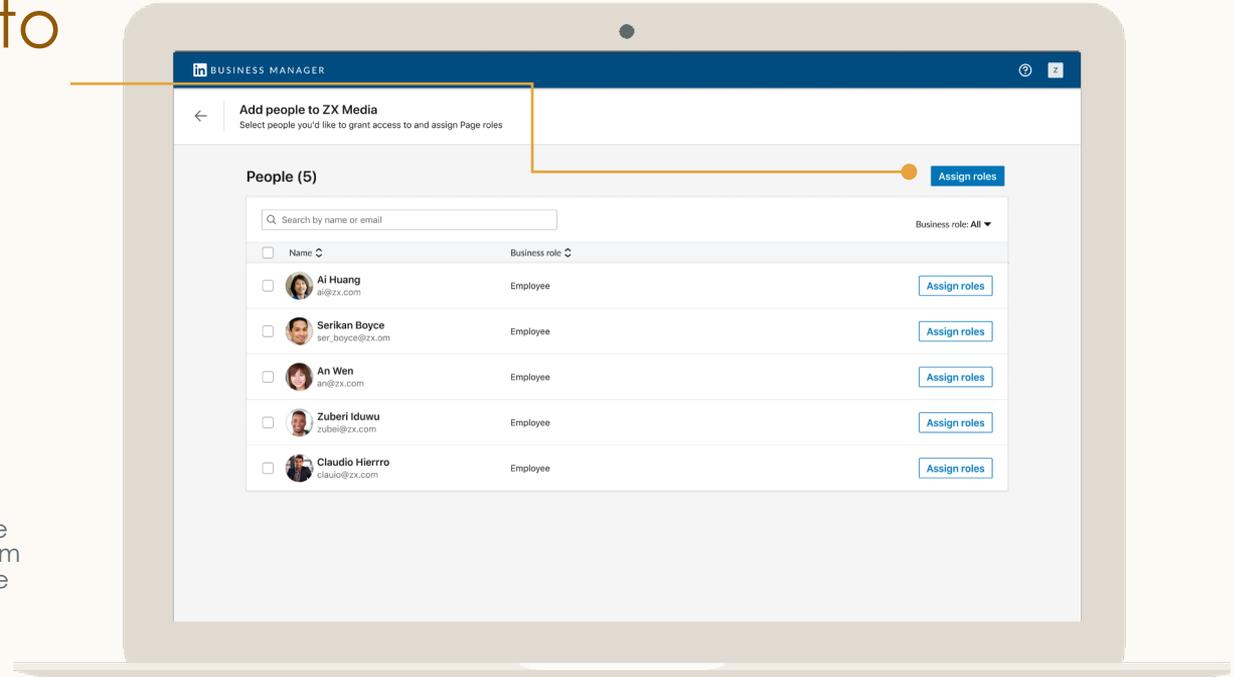


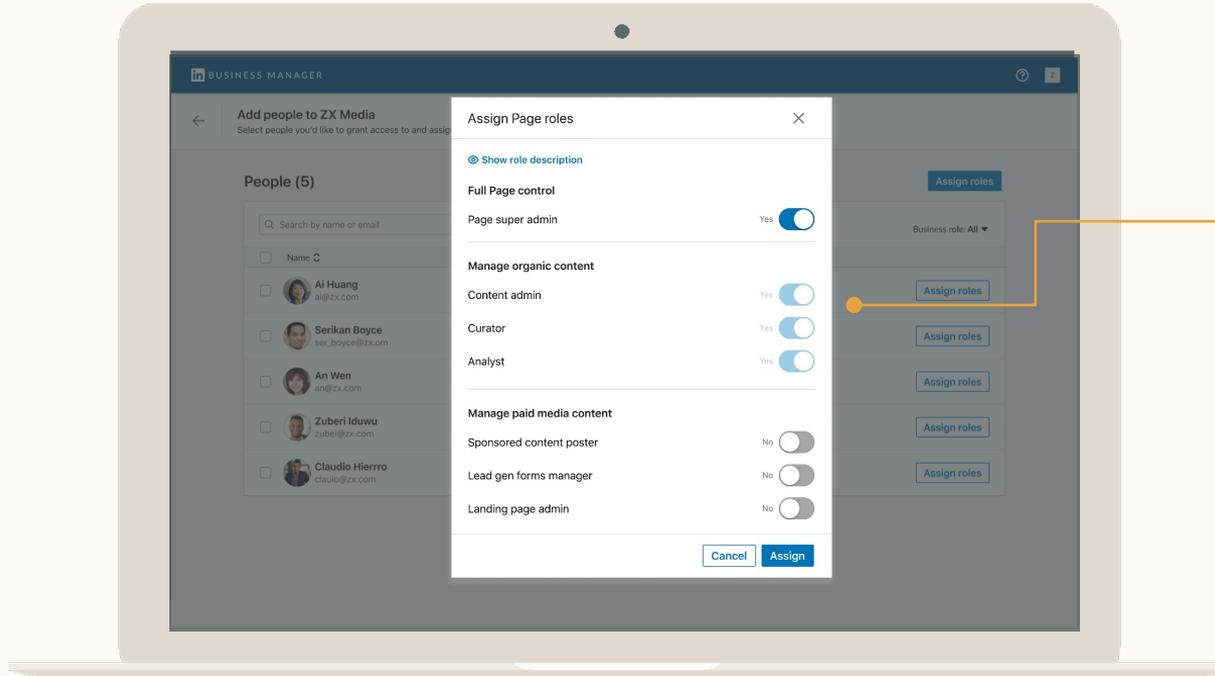
## Select People to Add and Click Assign Role

You can see all the People that are part of your Business Manager and select one or many to add to the Page.



**Tip:** If assigning multiple people the same role, select all of them at once and click *Assign* at the top right of the table.





## Assign their Page Roles

Select the Page roles the people should have on this Page.

You can select *Page Super Admin* access or from the individual Organic and Paid Media roles.

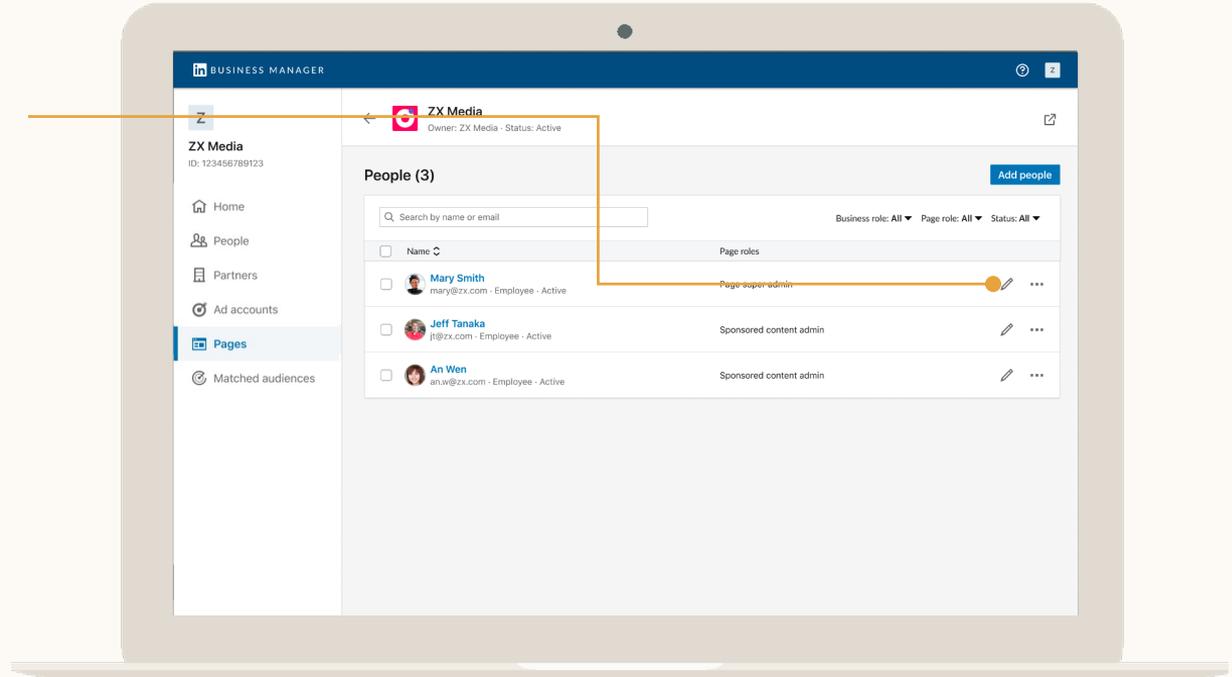
Learn more about [Page Roles](#).

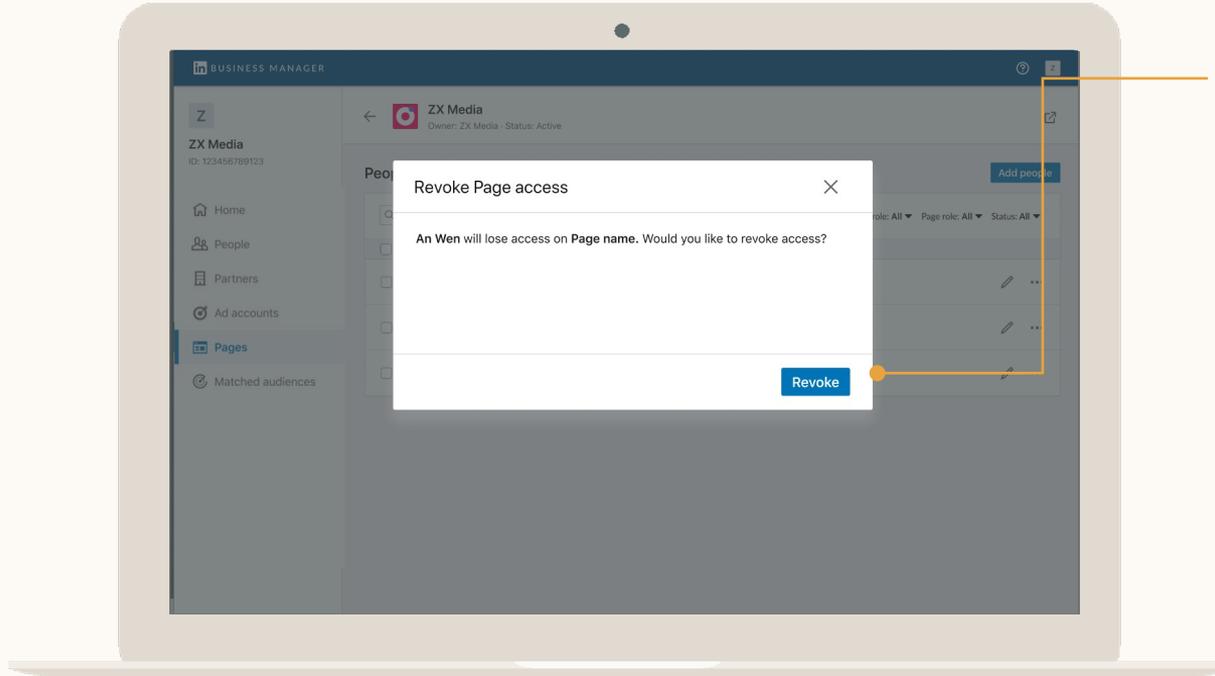


## Update People's Page Roles

To update people's roles, select them from the Page profile page and click *Edit Page roles*.

You can also click the Ellipsis next to them and select *Edit Page Role*.





## Remove People from Pages

If you need to remove multiple people, select them from the Page profile page and click *Revoke Access* in the upper right hand corner. To remove one person, you can click the ellipsis and select *Revoke Access*.

This will immediately cause them to lose Page access, but they'll still be in your Business Manager.



# Partner Management

- Track the different businesses you work with
- Share Ad Account and Page access to a Partner
- Manage your people's access to Ad Accounts and Pages your Partners have shared with you



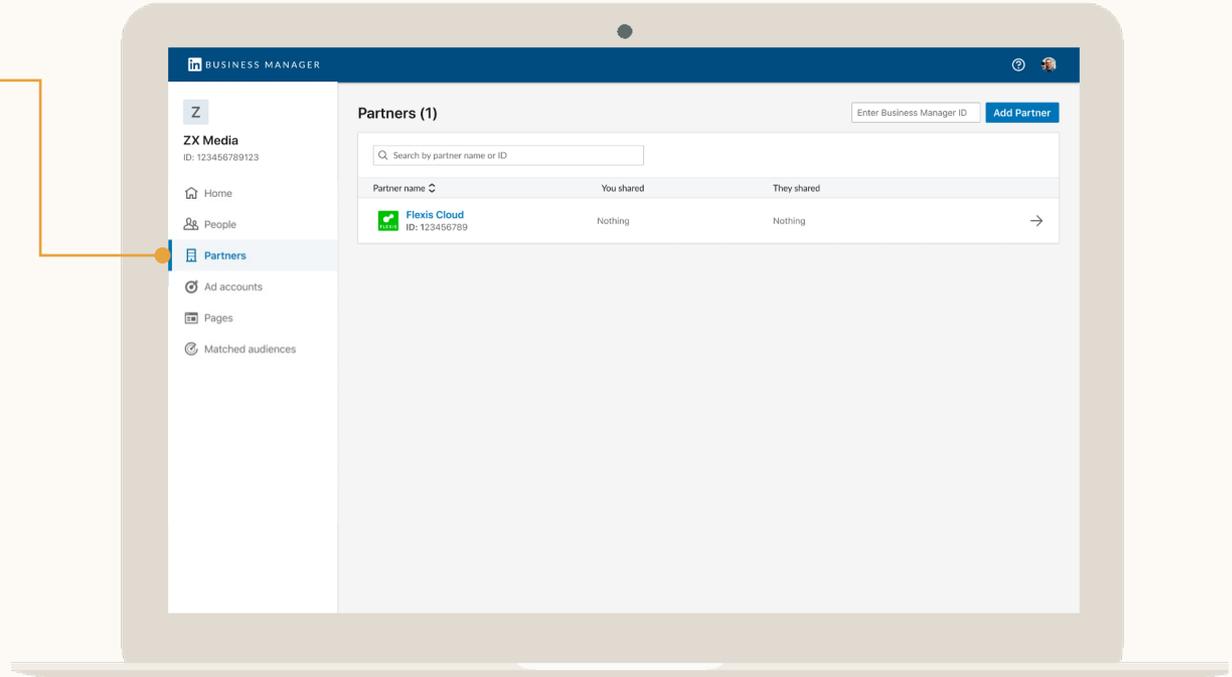
# A Secure and Efficient Way for Businesses to Work Together

	Feature	Benefit
You work with other businesses on marketing initiatives	<ul style="list-style-type: none"><li>• Share access to the Ad Accounts and Pages you own with another Business Manager and view your partners in one place.</li></ul>	<ul style="list-style-type: none"><li>• Know the organizations you work with, who they are, and what they have access to.</li></ul>
Your partner's account team changed	<ul style="list-style-type: none"><li>• Each Business Manager can update permissions independently.</li></ul>	<ul style="list-style-type: none"><li>• Save time managing access as each business can manage its own people.</li></ul>
You stopped working with a business partner	<ul style="list-style-type: none"><li>• You can remove an entire business from your Ad Accounts and Pages.</li></ul>	<ul style="list-style-type: none"><li>• Easily ensure the right people and businesses have access to the right Accounts and Pages.</li></ul>



## View Your Partners

Click *Partners* to view. See what you've shared with them and what they've shared with you.

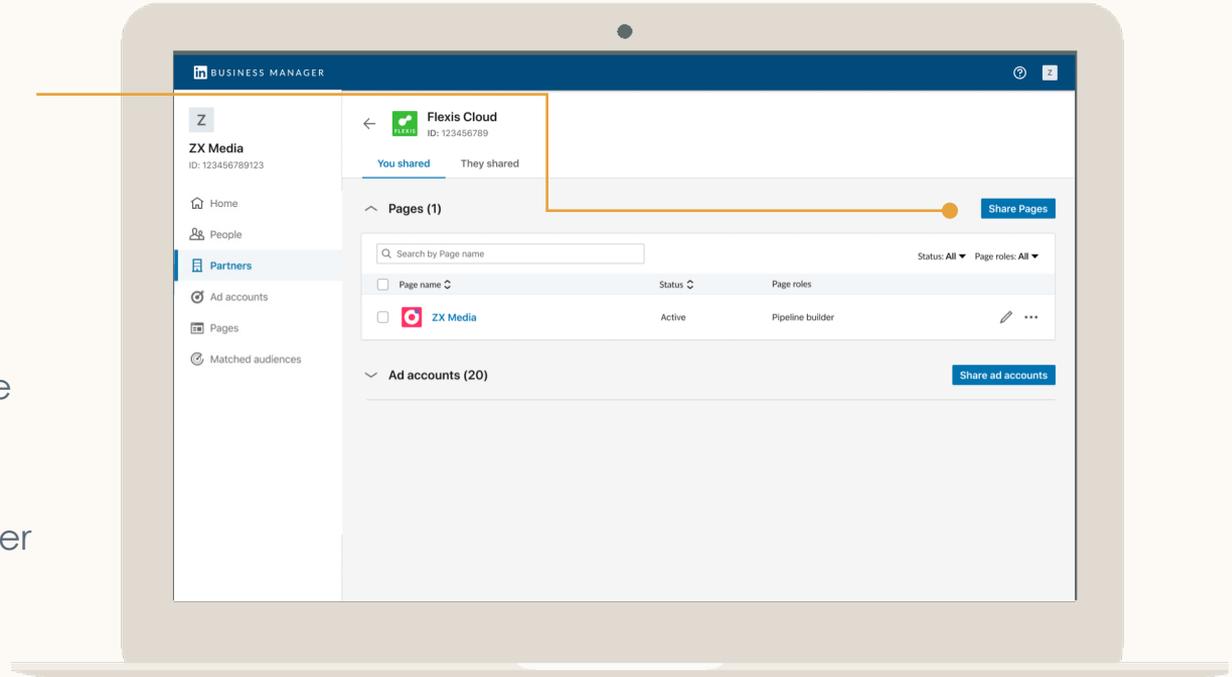




Click on a Partner to start sharing Pages with them

Click *Share Pages* to select which of your Pages to share with the Partner.

Partners cannot reshare Ad Accounts or Pages to another business.

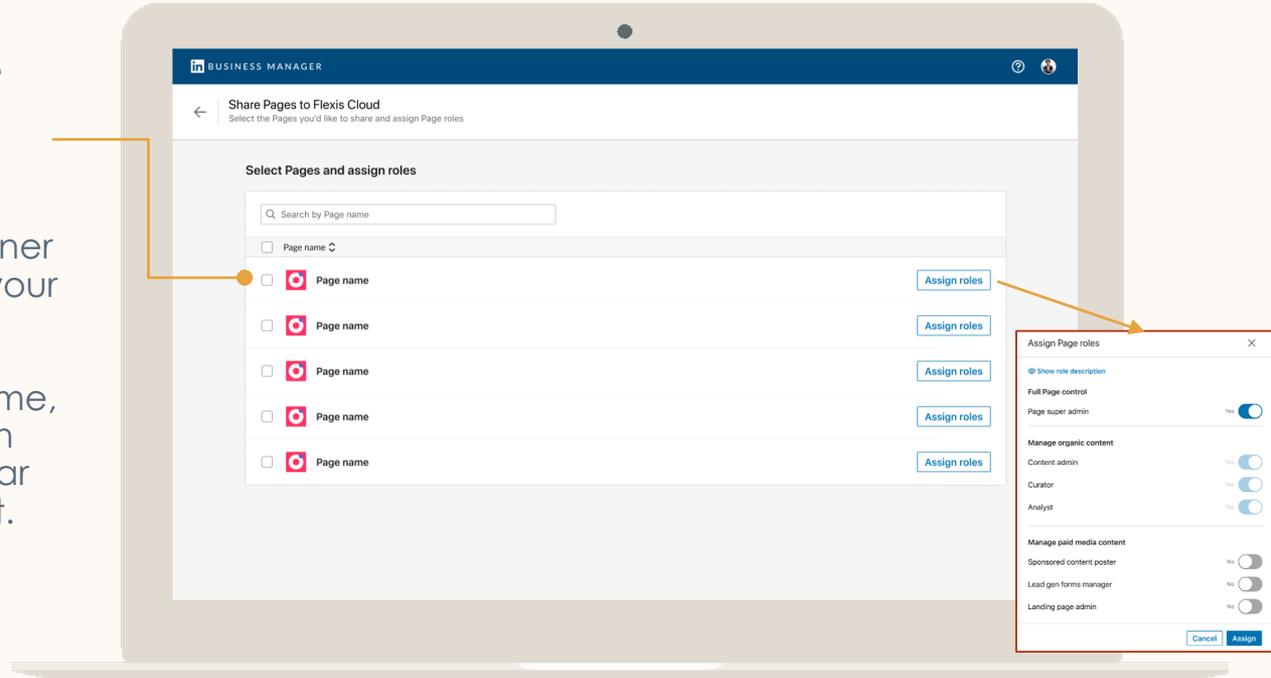




## Select Pages and Assign the Role

These are the roles your Partner can assign their people on your Pages.

To share many Pages at a time, select the checkbox, and an "Assign Role" icon will appear above the table on the right.





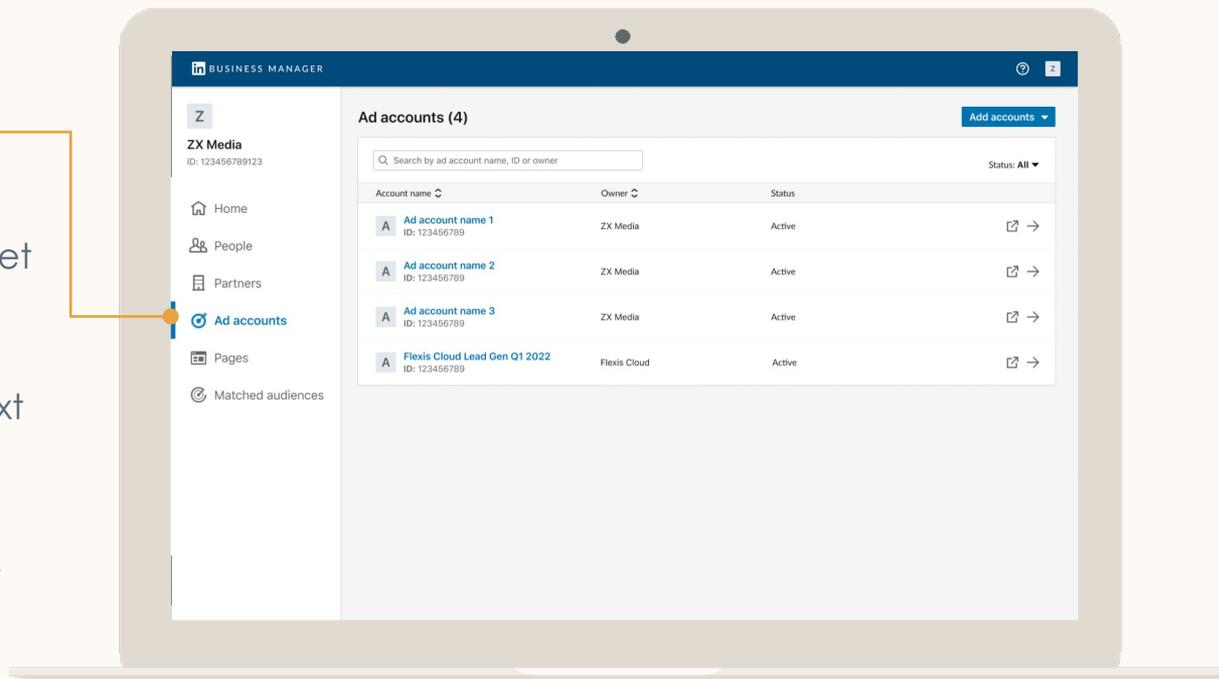
## Go to the Ad Accounts Table

Search for your Partner's asset in the Owner column of the table.

Click the right-side arrow next to the asset and click *View Details*.

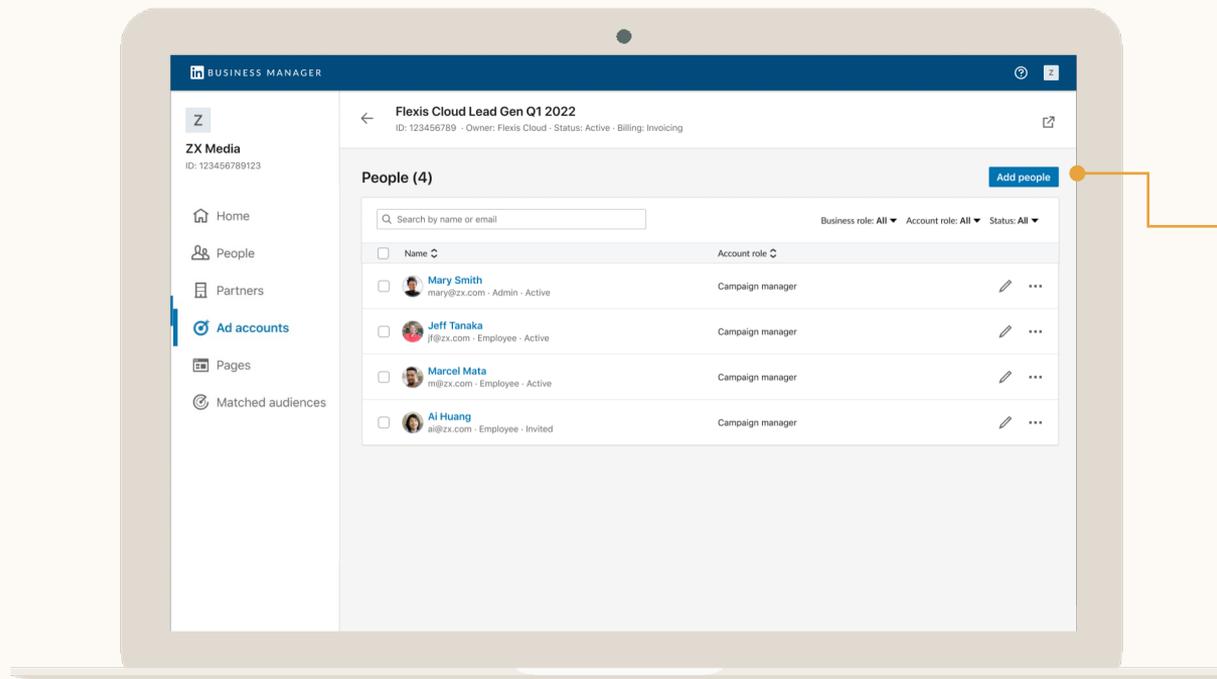


**Tip:** You can only assign your people the role(s) your Partner allowed when they shared the asset with your Business Manager.





## Partner Management: Adding People to a Partner's Ad Account



Click *Add People*

Select which people you'd like to add to your Partner's Ad Account.

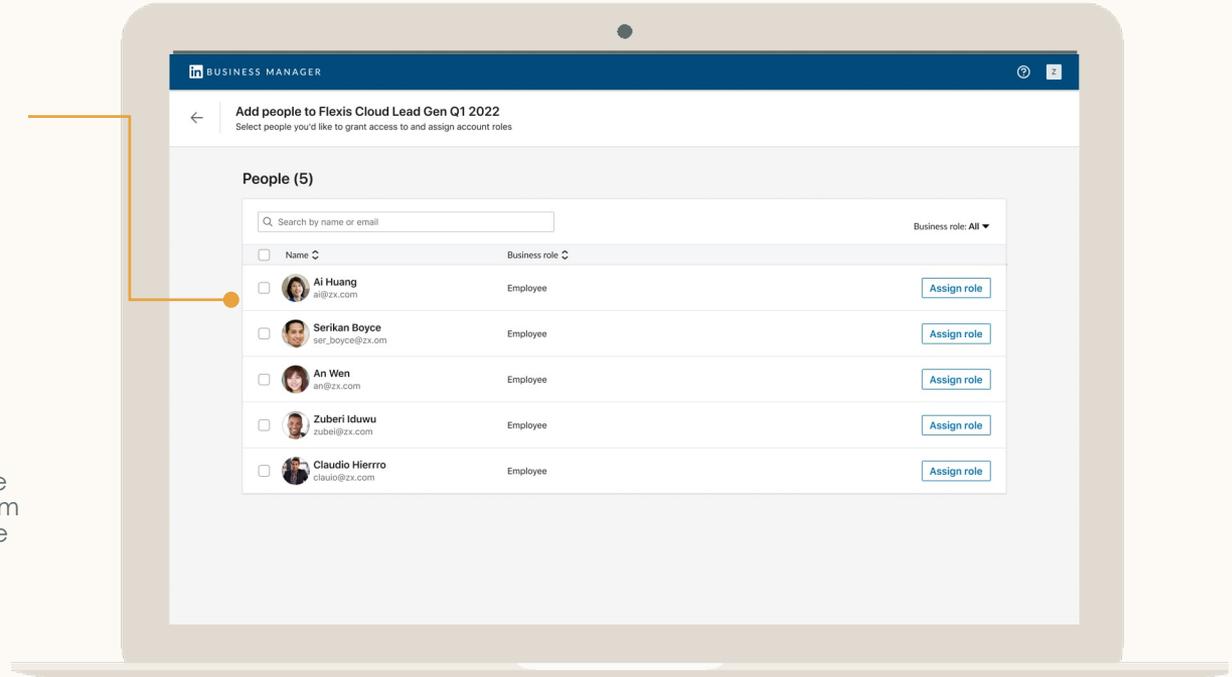


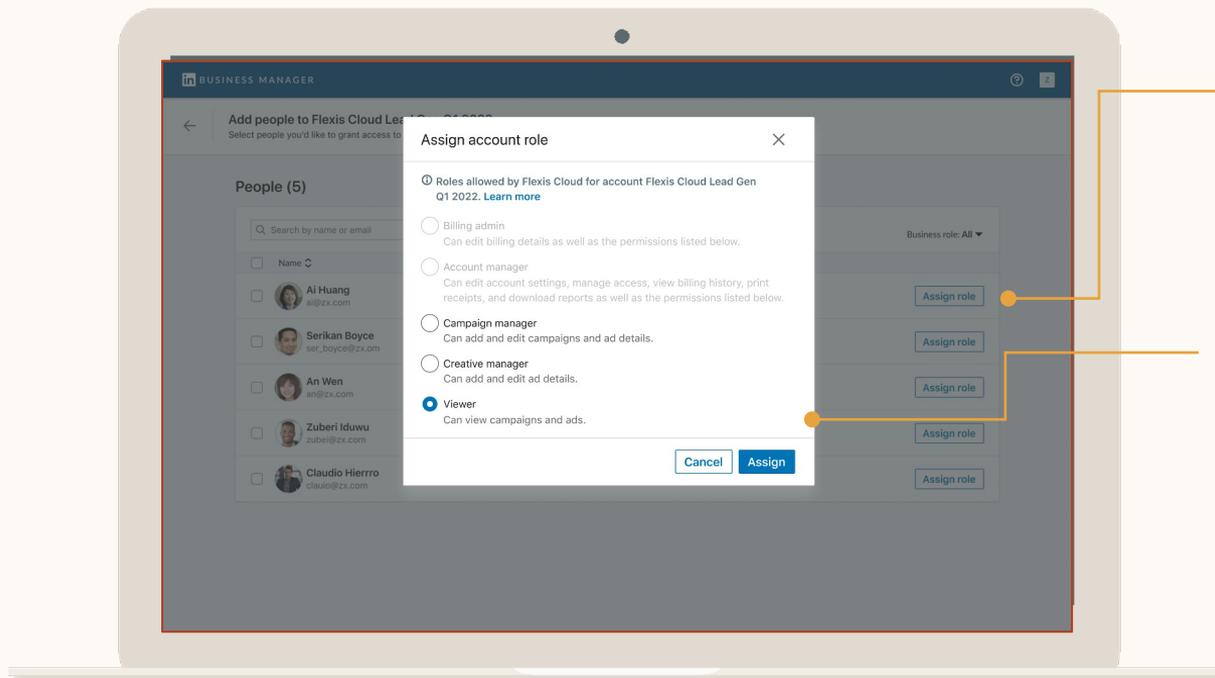
## Select People to Add

You can see all the People that are part of your Business Manager and select one or many to add to the Ad Account.



**Tip:** If assigning multiple people the same role, select all of them at once and click *Assign* at the top right of the table.





## Click Assign Role and Select the Role

Choose the role the people should have on this Ad Account. Learn more about [Ad Account Roles](#).



**Tip:** You can only assign your people the role(s) your Partner allowed when they shared the asset with your Business Manager.



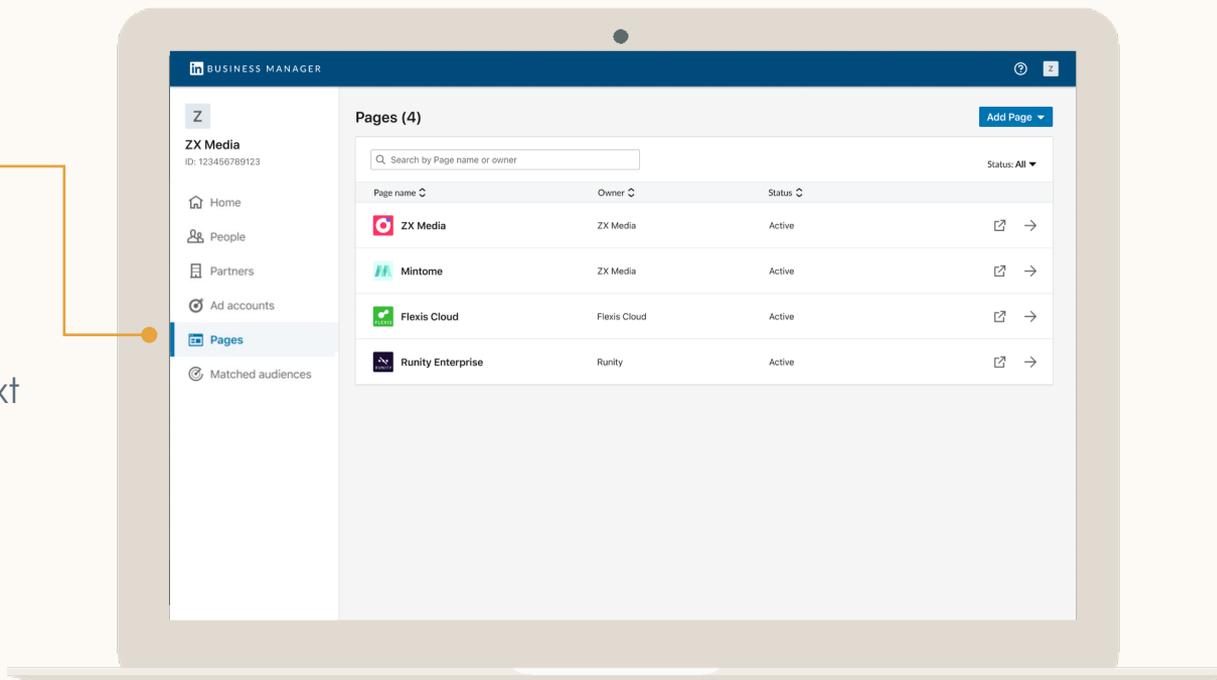
## Go to the Pages Table

View owners of your shared pages and access request status.

Click the right-side arrow next to the Account or Page and click *View Details*.

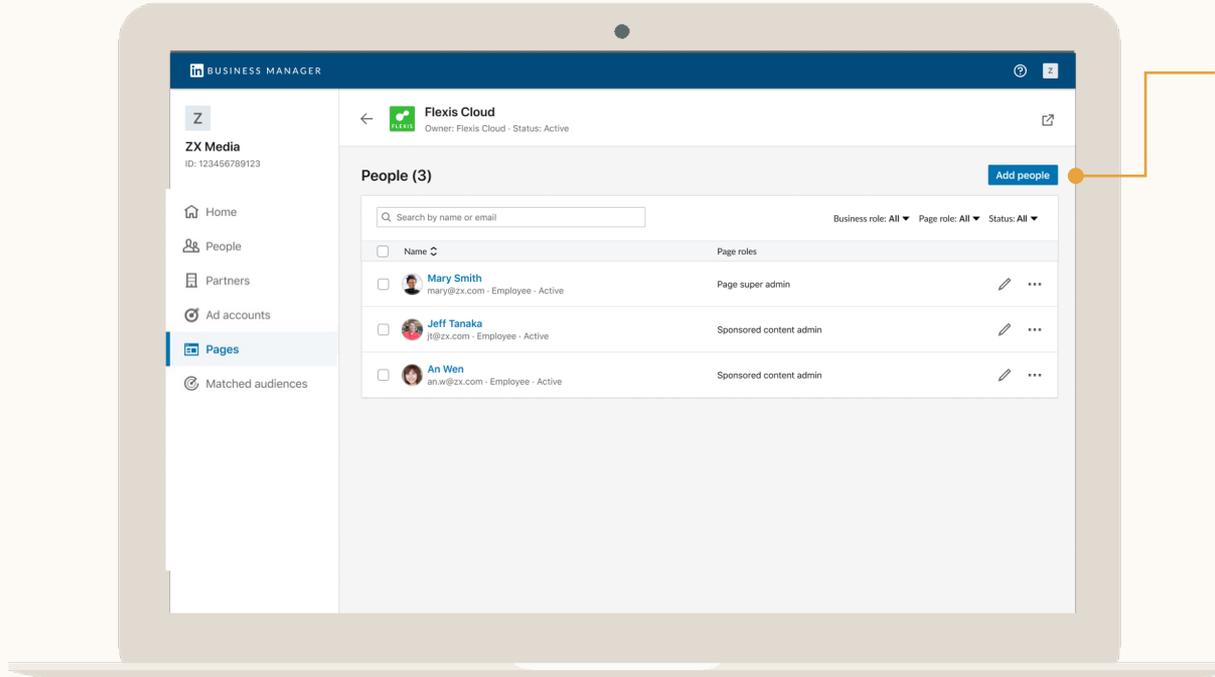


**Tip:** If your request has not yet been approved. Resend your request by clicking the envelope icon.





## Partner Management: Adding People to a Partner's Pages



Go to the Page  
and Click *Add  
People*

Once you have been granted access to your Partner's Page you can easily add people to the shared Page.



# Select People to Add and Click Assign Role

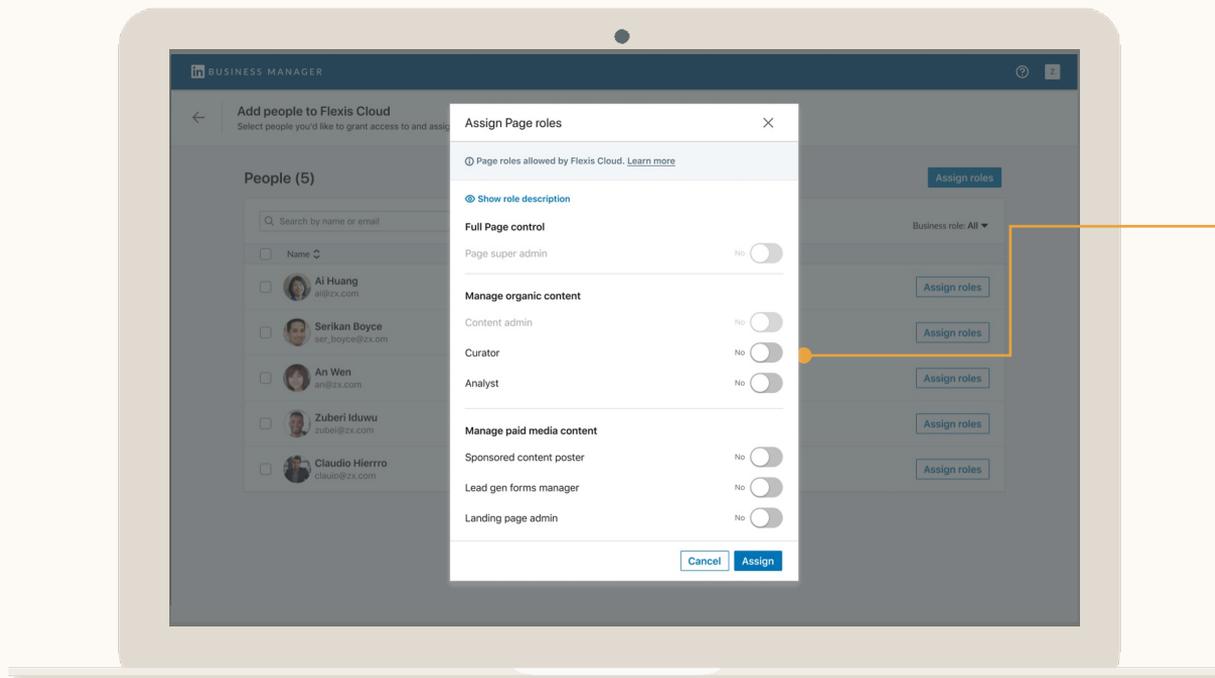
You can see all the People that are part of your Business Manager and select one or many to add to the Page.



**Tip:** If assigning multiple people the same role, select all of them at once and click *Assign* at the top right of the table.

The screenshot shows the LinkedIn Business Manager interface for adding people to a page. The header reads "Add people to Flexis Cloud" with a sub-header "Select people you'd like to grant access to and assign Page roles". Below this is a section titled "People (5)" with a search bar and a "Business role: All" dropdown. A table lists five people, each with a checkbox, profile picture, name, email, role, and an "Assign roles" button. An orange line from the text on the left points to the "Assign roles" button for the first person, Ai Huang.

<input type="checkbox"/>	Name	Business role	Assign roles
<input type="checkbox"/>	Ai Huang ai@zx.com	Employee	Assign roles
<input type="checkbox"/>	Serikan Boyce ser_boyce@zx.com	Employee	Assign roles
<input type="checkbox"/>	An Wen an@zx.com	Employee	Assign roles
<input type="checkbox"/>	Zuberi Iduwu zuberi@zx.com	Employee	Assign roles
<input type="checkbox"/>	Claudio Hierro claudio@zx.com	Employee	Assign roles



## Assign their Page Roles

Select the Page roles the people should have on this Page.

You can select *Page Super Admin* access or from the individual Organic and Paid Media roles.

Learn more about [Page Roles](#).



**Tip:** You can only assign your people the role(s) your Partner allowed when they shared the asset with your Business Manager.



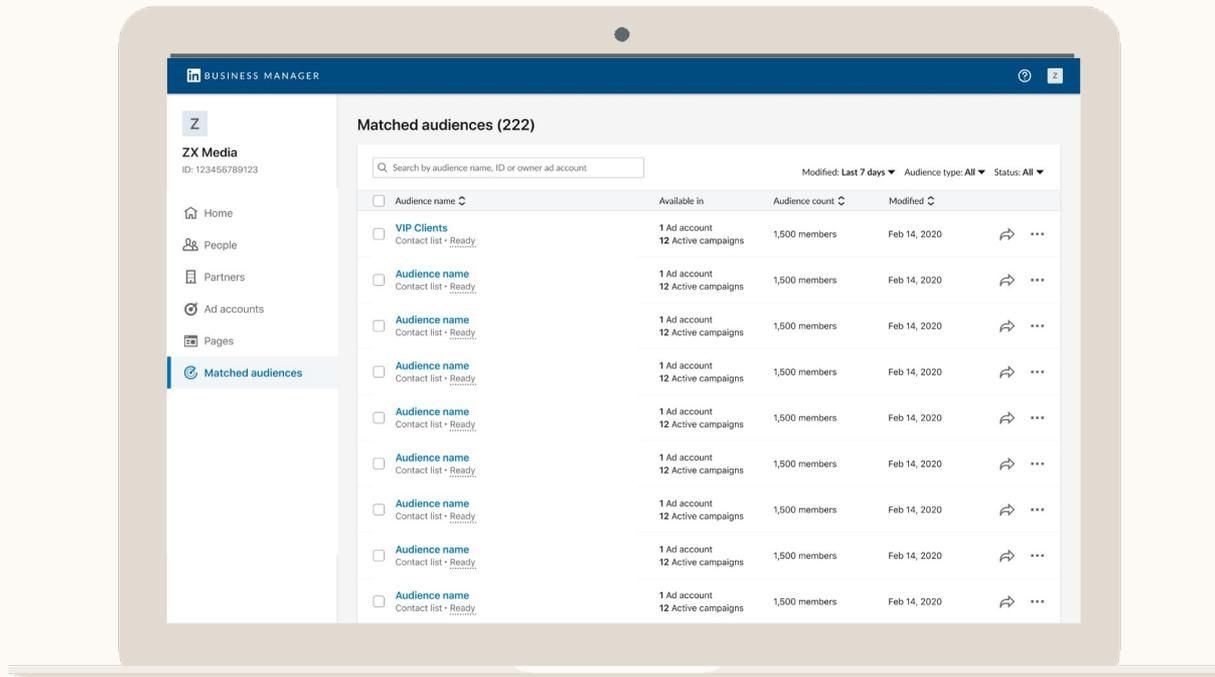
# Audience Sharing

- View all Matched Audiences across your Ad Accounts
- Share audiences
- Unshare audiences
- Use shared audiences in a campaign
- Share audiences with another business



# Audience Sharing allows you to easily leverage the same Audiences across multiple Ad Accounts

	Use Case	Benefit
Global Scale	<ul style="list-style-type: none"><li>You need to use the same Matched Audience across different regions' Accounts.</li></ul>	<ul style="list-style-type: none"><li>Regional teams can use high-performing audiences without needing to create and manage new segments.</li></ul>
Audience Maintenance	<ul style="list-style-type: none"><li>You maintain audiences, like existing customers or loyalty program members, to use as targeting or exclusion facets across all your Ad Accounts.</li></ul>	<ul style="list-style-type: none"><li>Save time maintaining a single audience versus individual audiences in each Ad Account you use.</li></ul>
Data Integrations	<ul style="list-style-type: none"><li>You want to use Data Integration audiences in Ad Accounts where the integration isn't setup or you have limited seats.</li></ul>	<ul style="list-style-type: none"><li>Save time and money on data integration setup and seats by sharing all audiences from one Account.</li></ul>
Engagement Retargeting	<ul style="list-style-type: none"><li>You want to target people that previously engaged with your campaigns in another Ad Accounts.</li></ul>	<ul style="list-style-type: none"><li>Move prospects further down the funnel by sharing Engagement Retargeting segments across Ad Accounts.</li></ul>

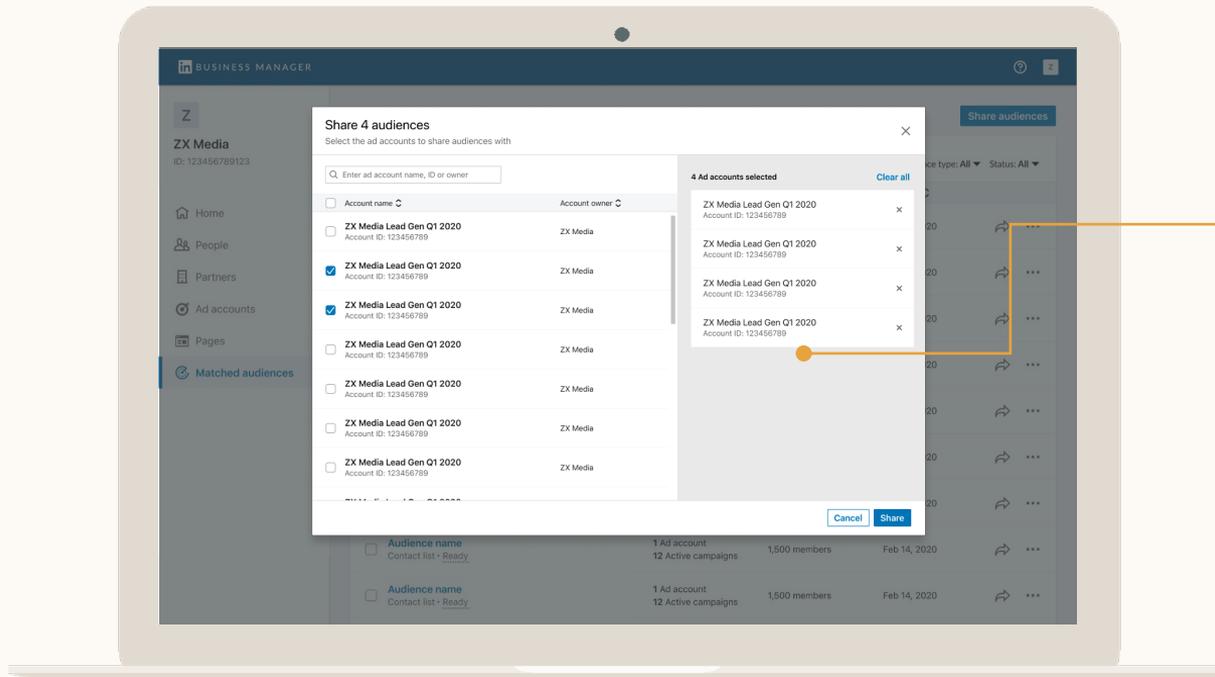


## View all your Matched Audiences

Admins will see all the Audiences the Business Manager owns.

All Matched Audience types can be shared including Audiences sent via a Data Integration and Engagement Retargeting segments.





## Select the Ad Accounts

Only Admins can share audiences across Ad Accounts. They'll immediately become available for use in those Ad Accounts.

When the original Audience is updated, that change will be reflected across all Ad Accounts and campaigns.



## Click an Audience for More Info

The Audience details page shows a summary of the Audience including size and when it was created.



**Tip:** You can also see which Ad Account the Audience was created in and navigate to that Account if you need to update the Audience

The screenshot shows the LinkedIn Business Manager interface for an audience named 'VIP Client'. The page is divided into a left sidebar and a main content area. The sidebar includes navigation options: Home, People, Partners, Ad accounts, Pages, and Matched audiences (selected). The main content area displays a summary of the audience and a list of matched ad accounts.

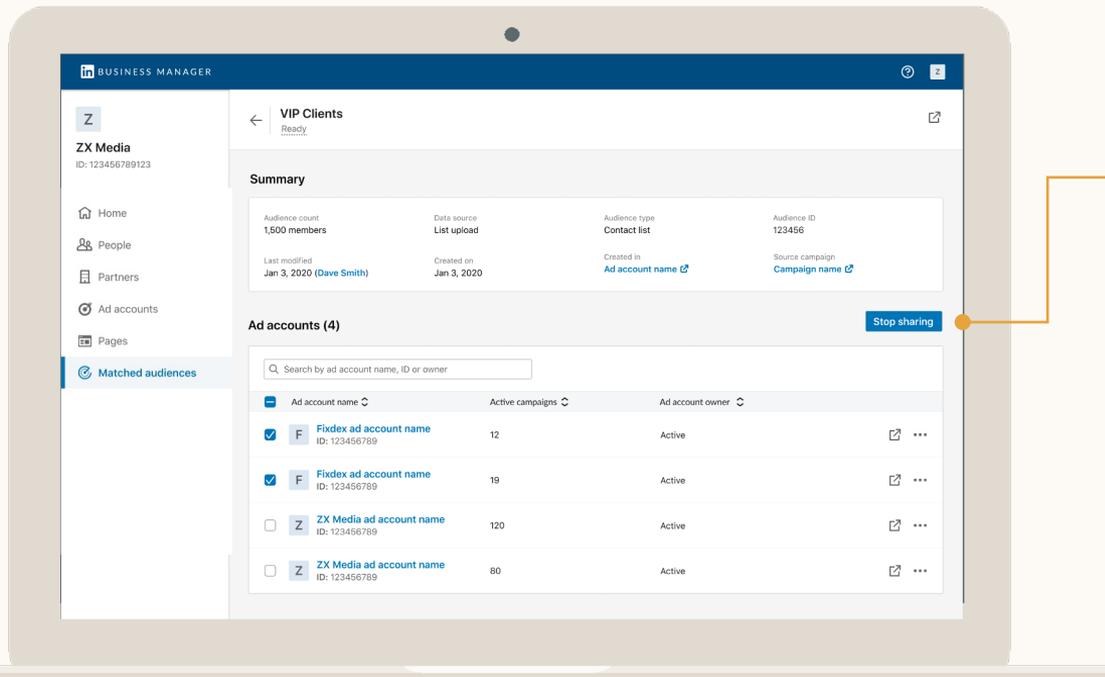
**Summary**

Audience count 1,500 members	Data source List upload	Audience type Contact list	Audience ID 123456
Last modified Jan 3, 2020 (Dave Smith)	Created on Jan 3, 2020	Created in <a href="#">Ad account name</a>	Source campaign <a href="#">Campaign name</a>

**Ad accounts (4)** [Share audience](#)

Search by ad account name, ID or ad account owner

Ad account name	Active campaigns	Owner	
<input type="checkbox"/> <b>F</b> <a href="#">Fixdex ad account name</a> ID: 123456789	12	Fixdex	<a href="#">Share</a> <a href="#">More</a>
<input type="checkbox"/> <b>F</b> <a href="#">Fixdex ad account name</a> ID: 123456789	19	Active	<a href="#">Share</a> <a href="#">More</a>
<input type="checkbox"/> <b>Z</b> <a href="#">ZX Media ad account name</a> ID: 123456789	120	Active	<a href="#">Share</a> <a href="#">More</a>
<input type="checkbox"/> <b>Z</b> <a href="#">ZX Media ad account name</a> ID: 123456789	80	Active	<a href="#">Share</a> <a href="#">More</a>



## Select Accounts you Want to Stop Sharing with

When an Audience is unshared, the Ad Account can no longer use it in campaigns. Any live campaign using the Audience will be paused.

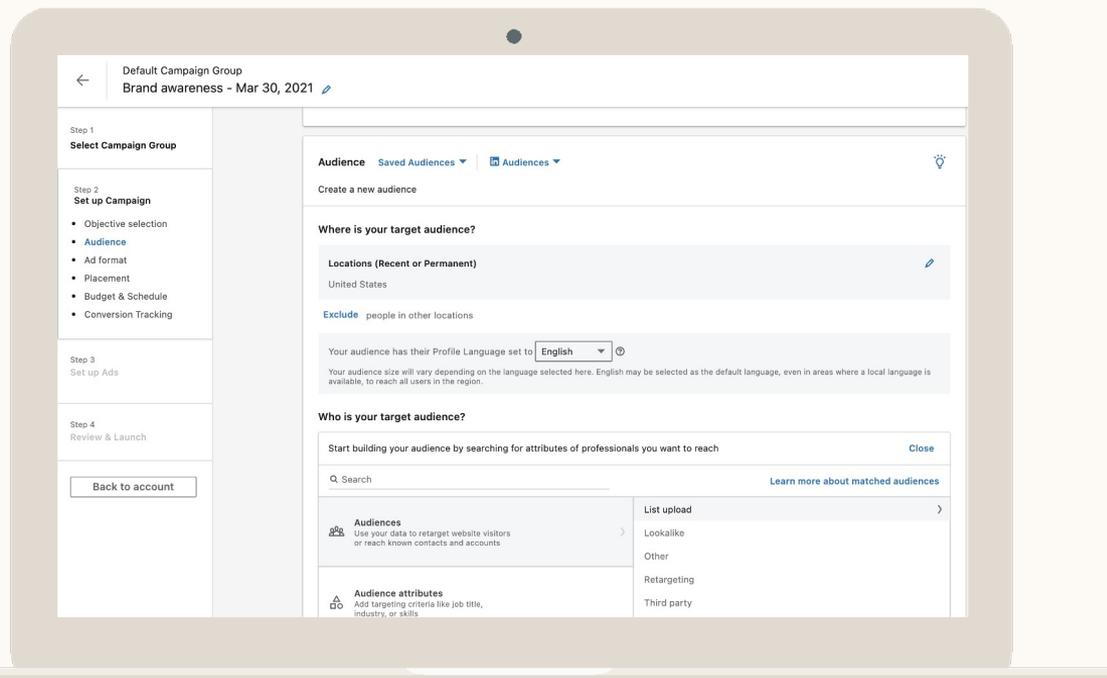


**Tip:** When unsharing an Audience, note the Ad Accounts it's been shared with. LinkedIn sends an email notification to the impacted Accounts, but you may want to reach out to people on that Ad Account before unsharing to avoid potential campaign disruption.



## Use Shared Audiences from Campaign Manager

You can find Shared Audiences in both the Matched Audience page and Matched Audience section of the campaign creation flow in Campaign Manager.





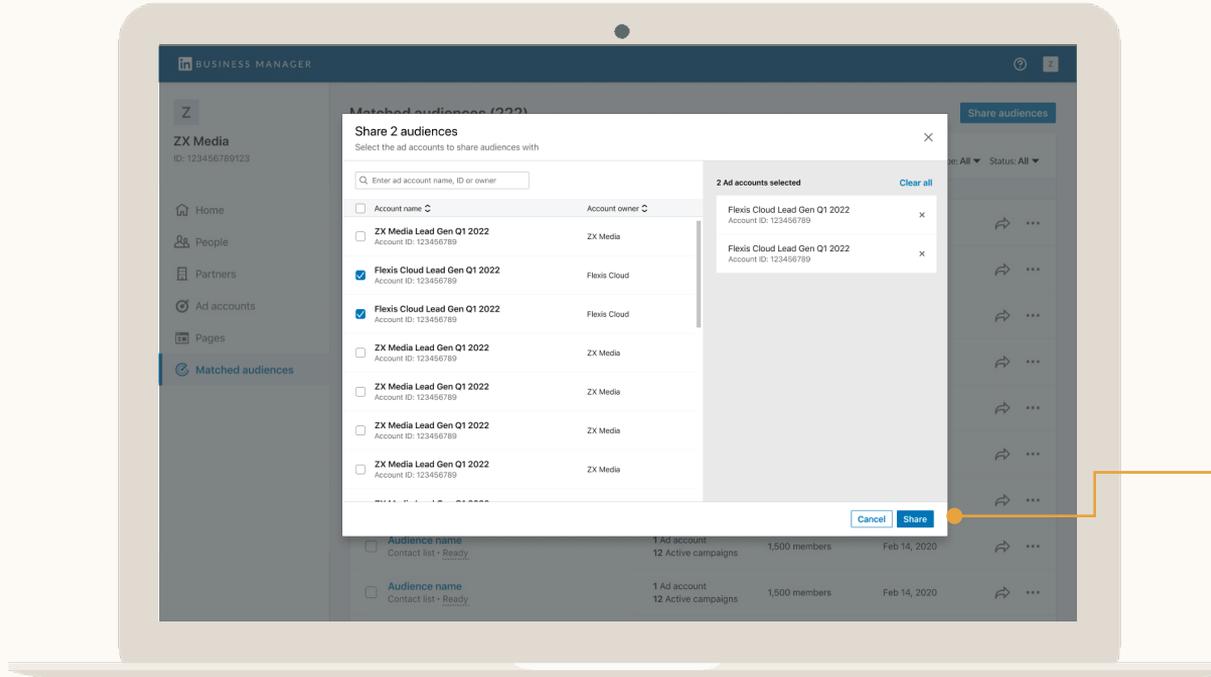
## Share Audiences to another Business

### Get access to the Ad Account(s) you want to share Audiences to

If the business has a Business Manager, use the Add Partner process and then ask them to share *Viewer* access or above. If they don't, use the *Request Ad Account* process.

### Admins can then share Audiences

Select the Audience(s) that you want to share and the Ad Account(s) of the other business you want to share them to. Users on those Ad Accounts can now use them in campaigns.





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[FAQ](#)

[Resources](#)



# Frequently Asked Questions



# What are some best practices for Business Manager?



Start by inviting your Admins. They will then add Accounts and Pages to get a list of people they need to invite.



If you work with other businesses across Accounts you manage in Business Manager, have a discussion with them on Ad Account ownership before adding them.



If requesting access to Ad Accounts or Pages, reach out to the people who will approve those requests. Business Manager is new and they may reject your request due to lack of awareness. We've provided email templates in the helpful resources section.



Have at least two Business Manager Admins. Admins have full access to all Accounts and Pages that get added to Business Manager, so we recommend providing the majority of people the *Employee* role.



If you need to give someone who isn't an employee of your business access to Business Manager, use the *Contractor* role to differentiate them from *Employees*.



Send FYI emails to people before you send invites. If people have trouble finding the original invite, click the ellipses next to their name and select *Resend*.



# What happens when I add an Ad Account or Page to Business Manager?

We've built Business Manager so that you can continue operating as normal while onboarding your Ad Accounts and Pages. Adding an Ad Account or Page to Business Manager **will not** impact live campaigns, billing, data integration setup, or cause existing users to lose access.

After an Ad Account or Page is added to Business Manager:

- These assets become available to Admins. They can perform actions like managing user access or sharing them to another Business Manager.
- Any user that had access before the asset was added to Business Manager will retain their access. If they have been invited to Business Manager, their access will automatically migrate and can be managed from Business Manager moving forward.
- If a user has not been invited, Admins can choose to invite them, remove them, or do nothing. If you're seeing people from other businesses, we suggest reaching out to that business and have them create a Business Manager so you can share Ad Account and Page access via a Business Manager Partnership.



# How do Business Manager Permissions work?

Business Manager sits above Ad Accounts and Pages to enhance access controls. People are invited via work emails with a specific business role that governs what they can do:

- **Admin:** Have full access to Business Manager and any Account or Page that's added to Business Manager.
- **Employee:** Have read-only access to Business Manager and can only access specific Accounts and Pages they've been permissioned to.
- **Contractor:** Have read-only access to Business Manager and can only access specific Accounts and Pages they've been permissioned to. Use this option for people that don't work for your business.

People can then be permissioned to the specific Ad Accounts and Pages they need to get their jobs done:

Ad Account Roles	Page Roles
Billing Admin Account Manager Campaign Manager Creative Manager Viewer	Super Admin Content Admin Curator Analyst Sponsored Content Poster Lead Gen Form Manager Pipeline Builder



# How do I work with other businesses using Business Manager?

Business Manager allows two businesses to share access to each other's Ad Accounts, Pages, and Matched Audiences.

If the business you're working with has a Business Manager:

- Use the [Add Partner flow](#). This allows each Business Manager to share specific Ad Accounts and Pages with the other business, so they can manage their own people's access to those shared assets.

If the business you're working with doesn't have a Business Manager:

- Use the [Request Access flow](#) for either Ad Accounts or Pages. This request must be approved by *Account Managers* or *Page Super Admins*.
- Once approved, you can manage your own people's access to these Ad Accounts and Pages.
- Be aware, that when the business that owns these assets goes to add them to their Business Manager, they must either remove you or first establish a Partnership with your Business Manager.



# Which Ad Accounts and Pages can I add to Business Manager?

You can add any Ad Accounts and Pages to Business Manager that your business owns or requests access to.

However, there are a few things to keep in mind:

1. Before creating Business Managers and adding assets, we recommend you meet with your business to discuss how you want to structure your Business Manager. For example, do you want to add all Ad Accounts and Pages globally to one Business Manager or segment by region.
2. If you're an agency or advertiser that works with agencies, have an explicit discussion on Ad Account ownership. We recommend baking this language into SOWs/contracts moving forward.
3. There'll initially be an 1,000 Ad Account limit in Business Manager, so start with active Accounts.
4. Once a Business Manager adds an Ad Account or Page, anyone that previously has access will show up in your Business Manager. *Business Manager Admins* can choose to:
  - a. Invite them to Business Manager
  - b. Remove them from all their Business Manager Accounts and Pages
  - c. Do nothing



## Which actions require the help of LinkedIn support?

Here are some common actions which you may need help from your Sales Representative:

- Getting a list of your Ad Accounts and Pages
- Removing an Account or Page from Business Manager
- Unsharing an Account or Page with a Partner
- Removing a Partner completely



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# Helpful resources



# Requesting Ad Account Access?

If your Business Manager is requesting access to an Ad Account that's not part of a Business Manager, you can use this language to send to the business whose Ad Account it is.

We recently created a LinkedIn Business Manager account.

Business Manager is a new platform that lets us centrally manage all our Accounts, Pages, and People. Business Manager will make it quick and easy for businesses like ours to work together on LinkedIn.

We just used Business Manager to request access to your Ad Account **[Enter Name and/or ID]**. *Account Managers* on the Account can approve this request by selecting *Business Manager Requests* after clicking their profile photo from the upper-righthand corner of [Campaign Manager](#).

All this does is allow our business to manage access to this Ad Account at the role we asked for so you don't have to. There's no impact to live campaigns or disruption to your business. At any point, you can remove our access through Campaign Manager one by one or everyone by writing into LinkedIn Support, though please check with us first before doing so.

Please let me know if you have any questions.



# Requesting Page Access?

If your Business Manager is requesting access to a Page that's not part of a Business Manager, use this email to send to the business whose Page it is.

We highly encourage you to use Business Manager to get business-access versus individuals requesting access via the "Request Sponsored Content" pop-up in Campaign Manager.

We recently created a LinkedIn Business Manager account.

Business Manager is a new platform that lets businesses centrally manage all their Accounts, Pages, and People. Business Manager will make it quick and easy for businesses like ours to work together on LinkedIn.

We just used Business Manager to request access to your Page **[Enter Name and/or URL]**. *Super Admins* on the Page can approve this request by selecting the Admin Tools dropdown and clicking Manage Admins.

All this does is allow our business to manage access to this Page at the role you specified to save you time. There's no other impact to your Page. At any point, you can remove our access one by one through Pages or as a whole by writing into LinkedIn Support. Please let us know before doing so.

Please let me know if you have any questions.



## Learn more with these useful resources

- All available [Business Manager Help Center Articles](#)
- Other useful Help Center Articles: [Ad Account Roles](#), [Page Roles](#), and [Matched Audiences](#)

# Thank You

Please reach out to your  
LinkedIn sales contact with  
any questions or feedback