



LinkedIn Business Manager: Onboarding Overview

Onboarding to LinkedIn's Business Manager is optional and can be done whenever it makes sense for your organization. During onboarding, you can continue to operate as normal:

- You don't need to recreate your Ad Accounts or Pages. These can be added easily.
- Your live campaigns, billing, and integrations won't be impacted at all.
- Existing users on Ad Accounts and Pages will retain their access. You'll just need to invite them to Business Manager.

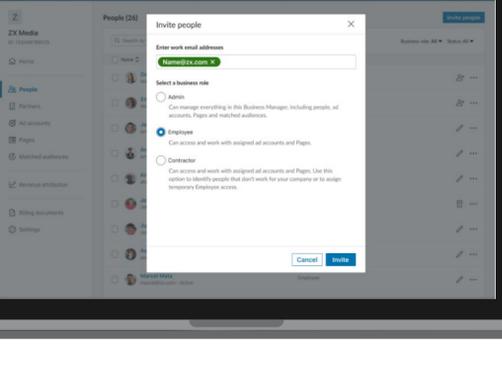
Pre-onboarding tips



- Identify an onboarding lead**
We recommend a senior leader with visibility into both paid and organic efforts who can oversee and delegate the addition of different Ad Accounts, Pages, and people to your Business Manager account. Once Admins add Accounts and Pages, they can easily see and invite the people already accessing those assets.
- Consider your Business Manager setup**
One globally? One per region or key market? One per business unit? All are possible, depending on your appetite for tighter control over access or better global visibility.
- Identify people, Ad Accounts, and Pages**
Compile the work-email addresses of employees who are currently accessing the Ad Accounts and Pages you want to add.
- If you're an agency and client working together, start discussing which organization owns the Ad Accounts you collectively use**
We recommend that the organization that manages the billing own the account. We can facilitate the transferring of ownership through a support process if both parties agree.

How onboarding works

Step 1 Invite people to Business Manager



Compile the work-email addresses of the people that are on the Ad Accounts you'll add. It doesn't matter if these emails are associated with their LinkedIn profile, but they must have a LinkedIn profile to login.

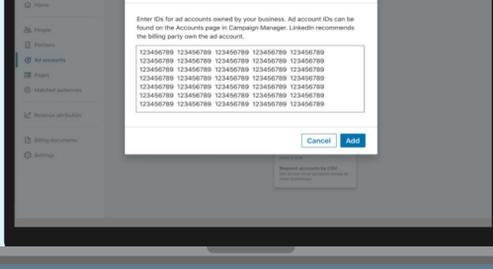
- People can be invited in one of three roles:
- Admin:** Typically senior marketers with team management responsibilities. They will have full access to Business Manager.
 - Employee:** Team members who can only act on the specific assets they've been assigned to.
 - Contractor:** External parties or non-employees who can only act upon specific assets they've been assigned to.

Tips

- Start by inviting other Admins before adding Ad Accounts or Pages.
- Give your people a heads-up to expect these invitations.
- You can copy a unique invitation link per person from Business Manager.

Step 2 Add Ad Accounts to Business Manager

Compile a list of the Ad Accounts you want to add. You'll need the nine-digit Ad Account ID found in Campaign Manager.



- There are three ways Business Managers can access Ad Accounts:
- Claim Ad Accounts Your Business Owns**
Your Business Manager will control the people and other businesses that can access these Ad Accounts. We recommend whoever pays the bills be the owner.
 - Request Access**
Your Business Manager will be granted access to the Ad Account at a specific role so you can add your people to it. Use this option if another business owns the Ad Account but won't be adding it to a Business Manager.
 - Receive Access from a Partner**
Another Business Manager owns the Ad Account and can share access to your Business Manager so you can add your people to it.

An existing Account Manager on the Ad Account must approve these requests. Once approved, access to the Ad Account will be managed exclusively from Business Manager. This means:

- Existing Ad Account users who have accepted their invite to your Business Manager will have their access automatically migrated to Business Manager.
- Business Manager will show you all the people on your Ad Accounts that haven't been invited to Business Manager yet. They will remain on the Ad Account. From Business Manager, Admins can either invite them, remove them from all Ad Accounts, or do nothing.

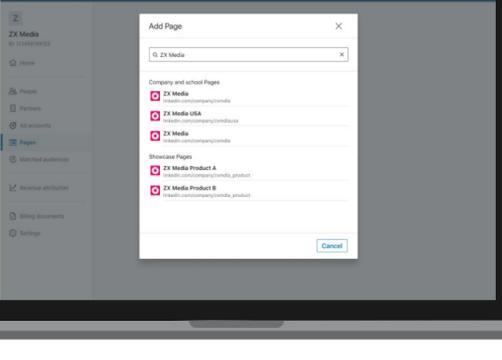
Tips

- If you work with other businesses on Ad Accounts, have a discussion about who should own the Ad Account. LinkedIn Support can help facilitate transferring an Ad Account from one Business Manager to another.
- Give Account Managers on Ad Accounts a heads-up that they'll need to approve these requests. When possible, have Business Manager Admins add Ad Accounts they're already an Account Manager on for auto-approval.
- Only one Business Manager can own an Ad Account, but the owner can share that Ad Account with many other Business Managers.

Step 3 Add Pages to Business Manager

Compile a list of the Pages you want to add to Business Manager. There are three ways Business Managers can access Pages:

- Add Pages Your Business Owns**
Your Business Manager will control the people and other businesses that can access these Pages.
- Request Access**
Your Business Manager will be granted access to the Page at a specific role so you can add your people to it. Use this option if another business owns the Page, but won't be adding it to a Business Manager.
- Receive Access From a Partner**
Another Business Manager owns the Page and can share access to your Business Manager so you can add your people to it.



An existing Super Admin on the Page must approve these requests. Unlike Ad Accounts, for a short period after launch, you can continue to manage access from the Page. However:

- Existing Page users who have accepted their invite to your Business Manager will have their access automatically migrated to Business Manager.
- Business Manager will show you all the people on your Pages that haven't been invited to Business Manager yet. They will remain on the Page. From Business Manager, Admins can either invite them, remove them from all Pages, or do nothing.

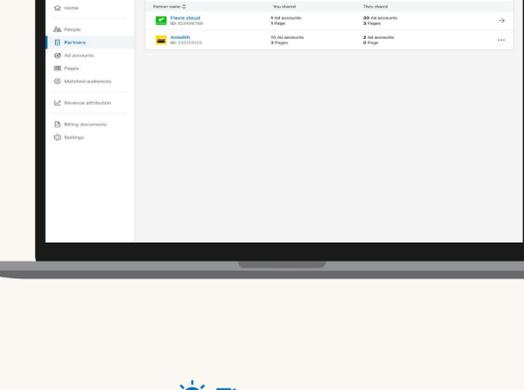
Tips

- If establishing Page ownership, an existing Page Super Admin must be invited to your Business Manager before adding the Page.
- Only one Business Manager can own a Page, but the owner can share that Page to many other Business Managers.

Step 4 Creating Business Manager Partnerships

If you work with other businesses across multiple Ad Accounts and Pages, Business Manager Partnerships are the most secure and efficient way to work together. Partnerships allow you to share specific Ad Accounts and Pages between Business Managers, so each business can manage their own people's access to them.

- Create Partnerships by entering the Business Manager ID of your Partner into your Business Manager.
- After creating the partnership, select the specific Ad Accounts and Pages you want to share with their Business Manager, as well as the specific roles they can add their people on those Ad Accounts and Pages.
- Your Partner can also select and share specific Ad Accounts and Pages to your Business Manager, allowing you to permission your people to those Ad Accounts and Pages.



Tip

Before adding Ad Accounts or Pages, reach out to the various businesses you work with on them. Let them know you're onboarding to Business Manager, advise them to create a Business Manager, and provide them with your Business Manager ID.