

Monthly Invoicing Getting Started Guide

Introducing our New Self Serve Invoicing Experience

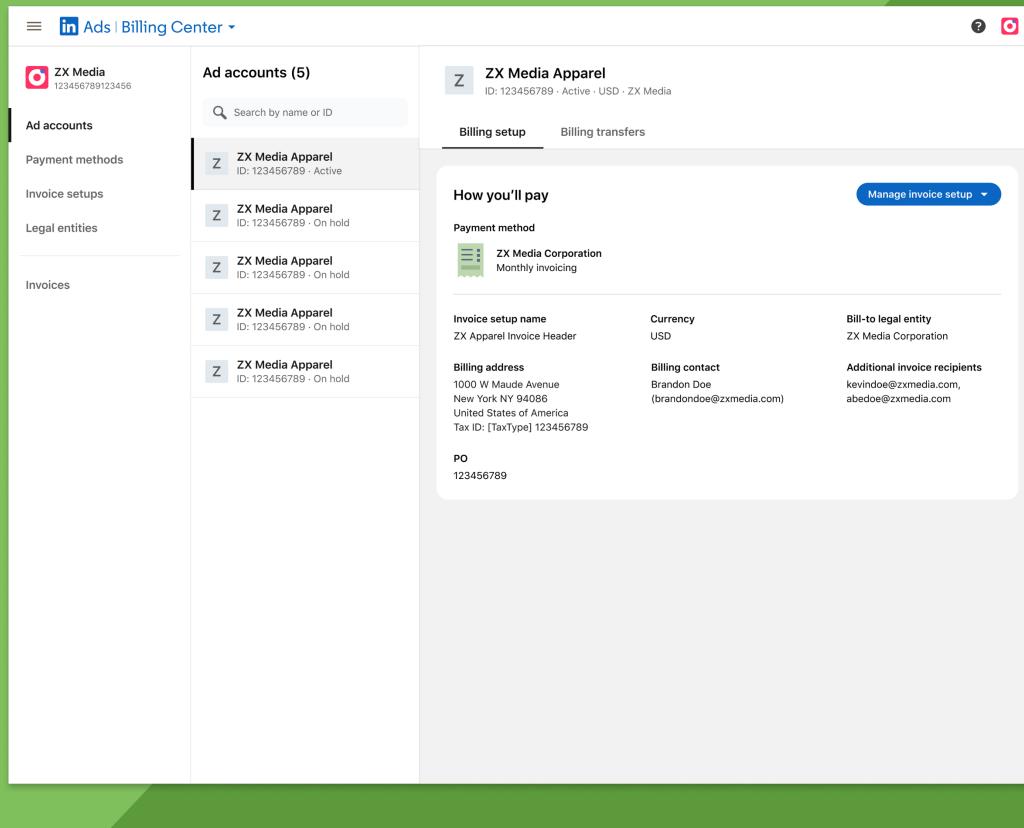




New! Monthly Invoicing Made Simple

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.

Setting up your Business Manager

Getting started Business Manager Invoicing

Claiming your Invoice Setups

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Set up new ad accounts for monthly invoicing



Downloading your Invoices

FAQ & Troubleshooting

Linked in



Setting up your Business Manager

If you already have Business Manager, skip to slide 60!



How does Business Manager work?

Don't worry!

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

Learn more about Business Manager <u>here</u>.



Invite your Admins to Business Manager using their work emails.

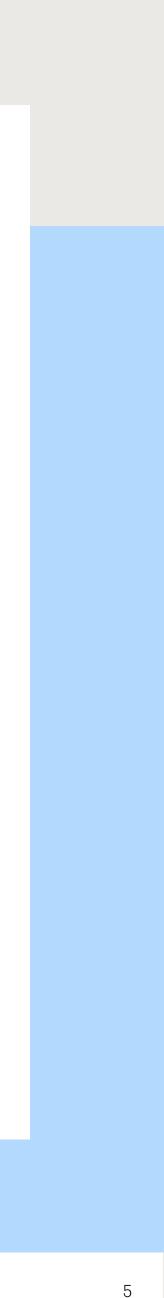
Add the Ad Accounts and Pages your business owns.

Get access to the Ad Accounts and Pages of other businesses you work with by setting up a Business Manager Partnership.

Invite the rest of your team to Business Manager using their work emails.

Use Business Manager to adjust Ad Account and Page permissions quickly if needed.





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Getting started with self-serve invoicing in Business Manager





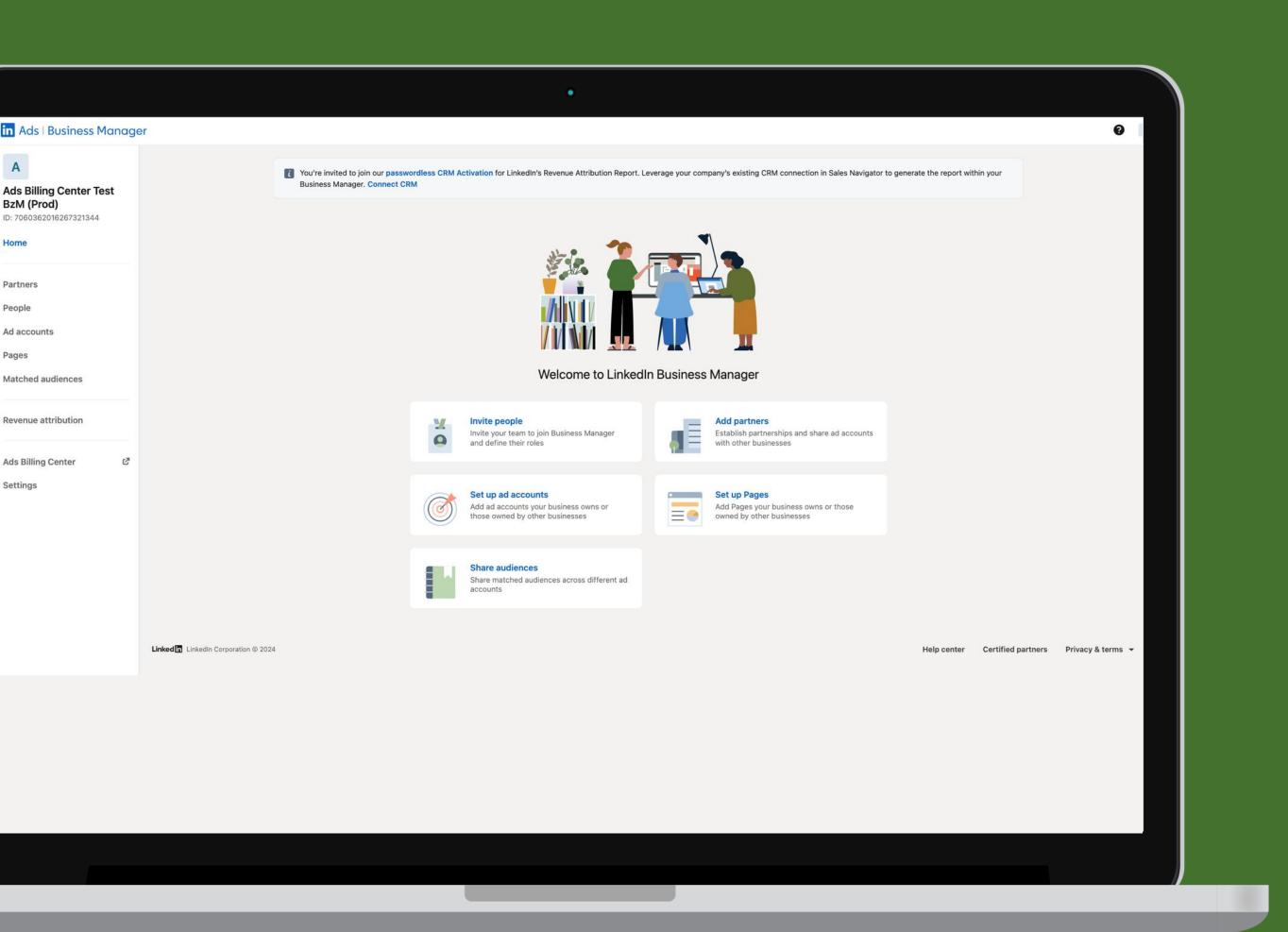


STEP 1:

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





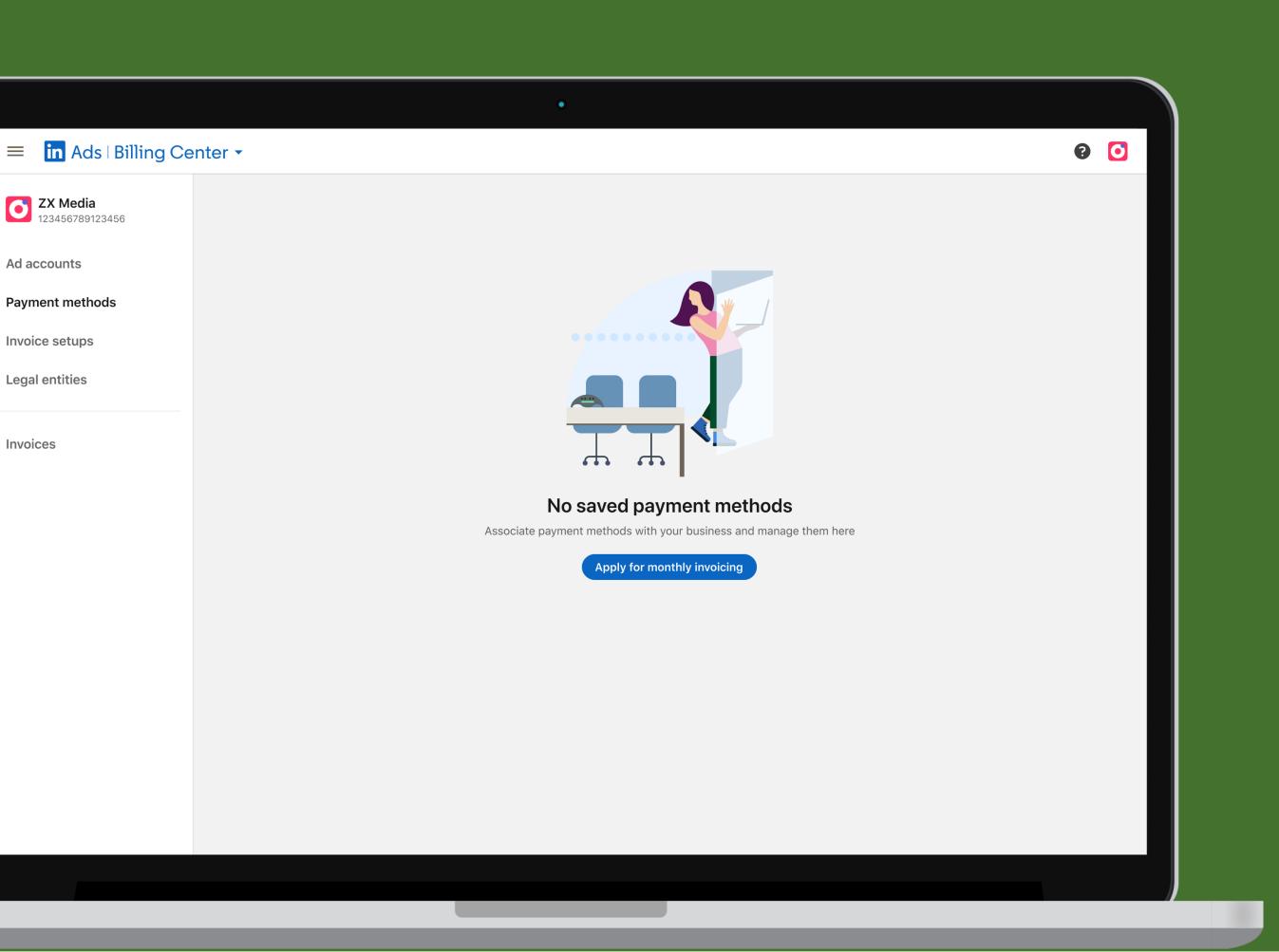
STEP 2:

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 <u>LinkedIn Support</u> 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 prequalify 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.

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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.

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ZX Media 123456789123456	Payment methods (1) +	ZX Media Corpora Monthly invoicing · Active		
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Payment methods	ZX Media Corporation Monthly invoicing			
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Legal entities		Q Search by ad account nam	ne or ID	
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		Z ZX Media Apparel ID: 123456789 · Active	ZX Media BM	ZX Apparel Invoice Header ID: 123456789 · USD
		Z ZX Media Apparel ID: 123456789 · Active	ZX Media BM	ZX Apparel Invoice Header ID: 123456789 · USD





STEP 4:

Complete a Monthly Invoicing Application

Apply on behalf of your business

 If you are an advertiser and are being billed directly for your ad costs, select "My Business" when asked who you are applying on behalf of.

Who are you applying on behalf of? 0



My business



Client business





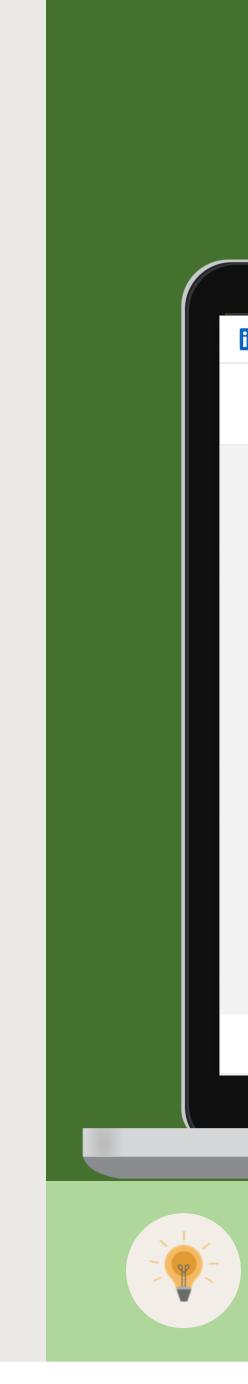


STEP 5:

Complete a Monthly Invoicing Application

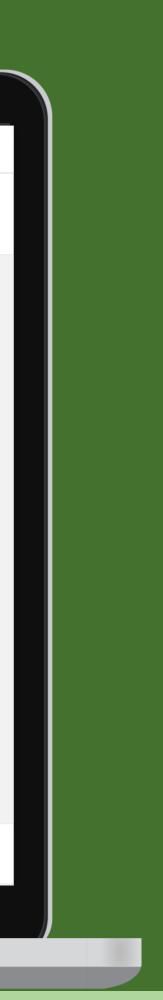
Apply on behalf of your business and create your Legal Entity

- 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.



n Ads Billing Center	@
 Apply for monthly invoicing Monthly invoicing is a payment method that reduces the number of transactions by consolidating your ads costs into monthly invoices. 	
Who are you applying on behalf of? Image: My business Image: Client business	
Business information Registered legal company name Enter your company name exactly as it appears on legal documents. Learn more Country/Region	
Address line 1 Enter your company's registered corporate address exactly as it appears on your legal documents. Learn more Address line 2 (optional)	

Tip: If you have questions about the application, review our glossary <u>here</u>.



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.



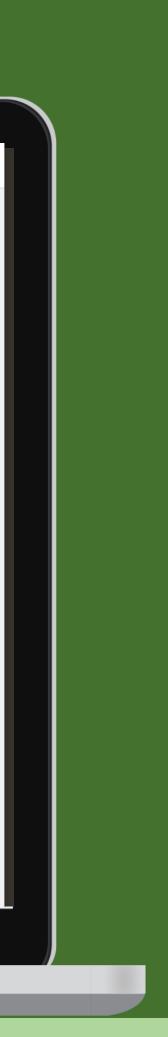
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Tip: Once your invoice setups have been claimed you can begin making changes to your invoice setups! Learn more about making changes in Section 5 of this Guide.

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Claiming your Invoice Setups







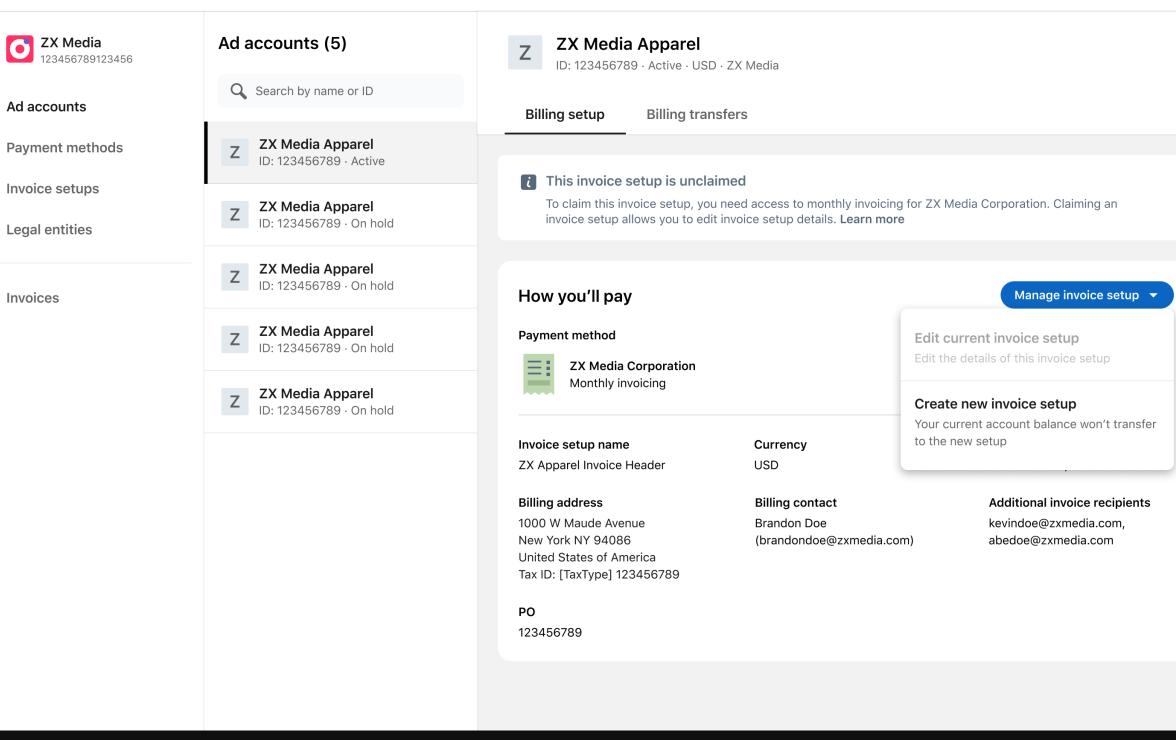


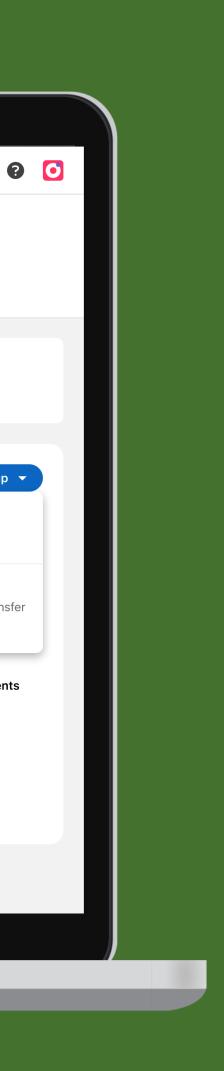
STEP 1: Claim your Invoice Setups

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.

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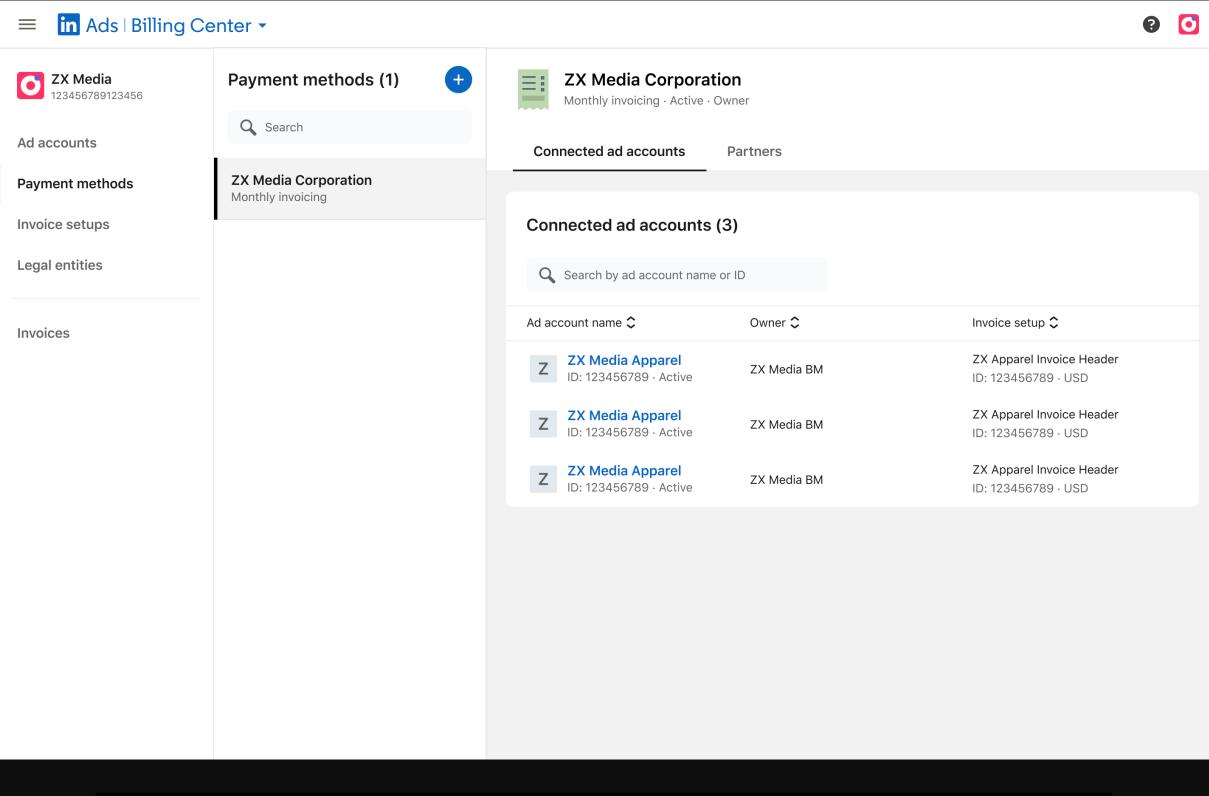


step 2: Claim your Invoice Setups

- 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.



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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.

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Setting up Ad Accounts for Monthly Invoicing



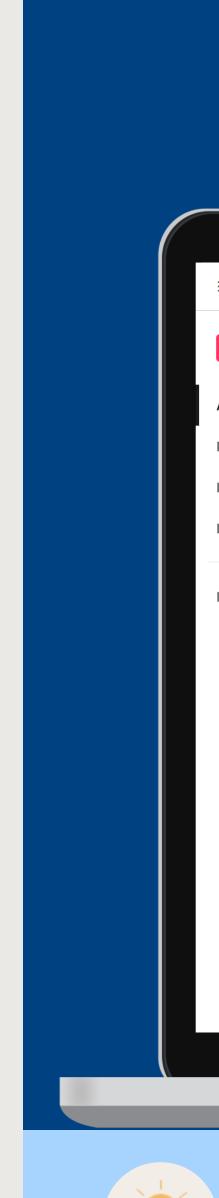


STEP 1A:

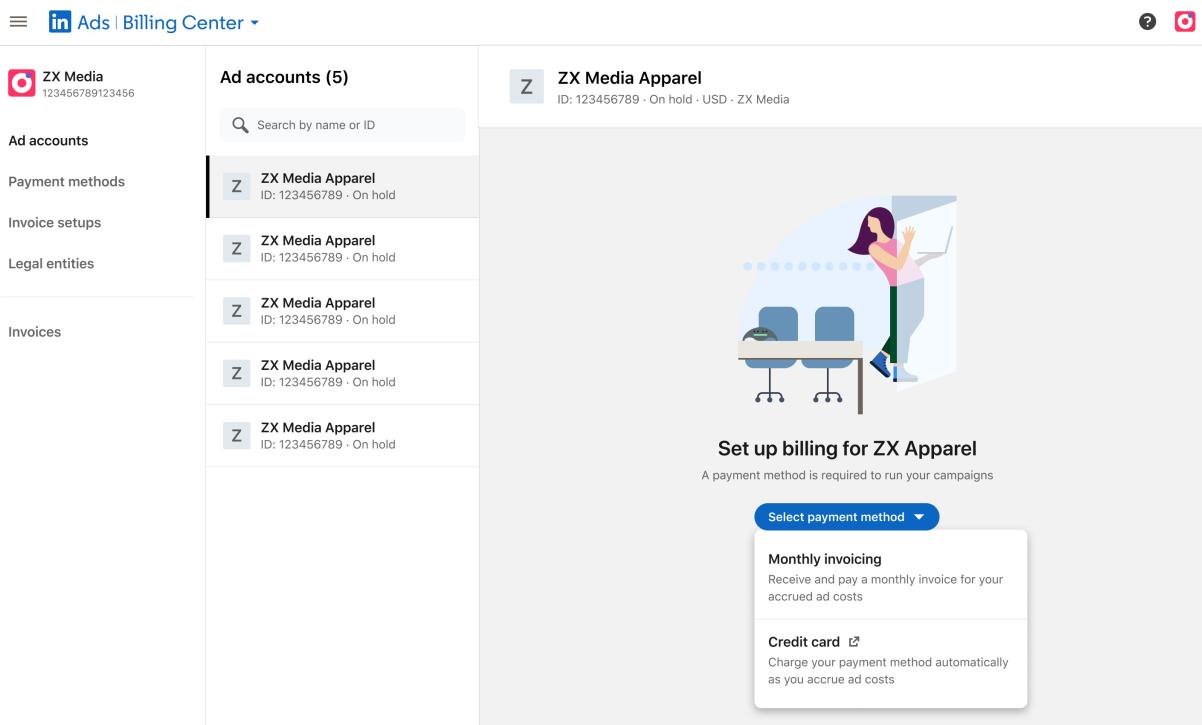
Setup your new Ad Accounts for Monthly Invoicing

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 <mark>here</mark>.

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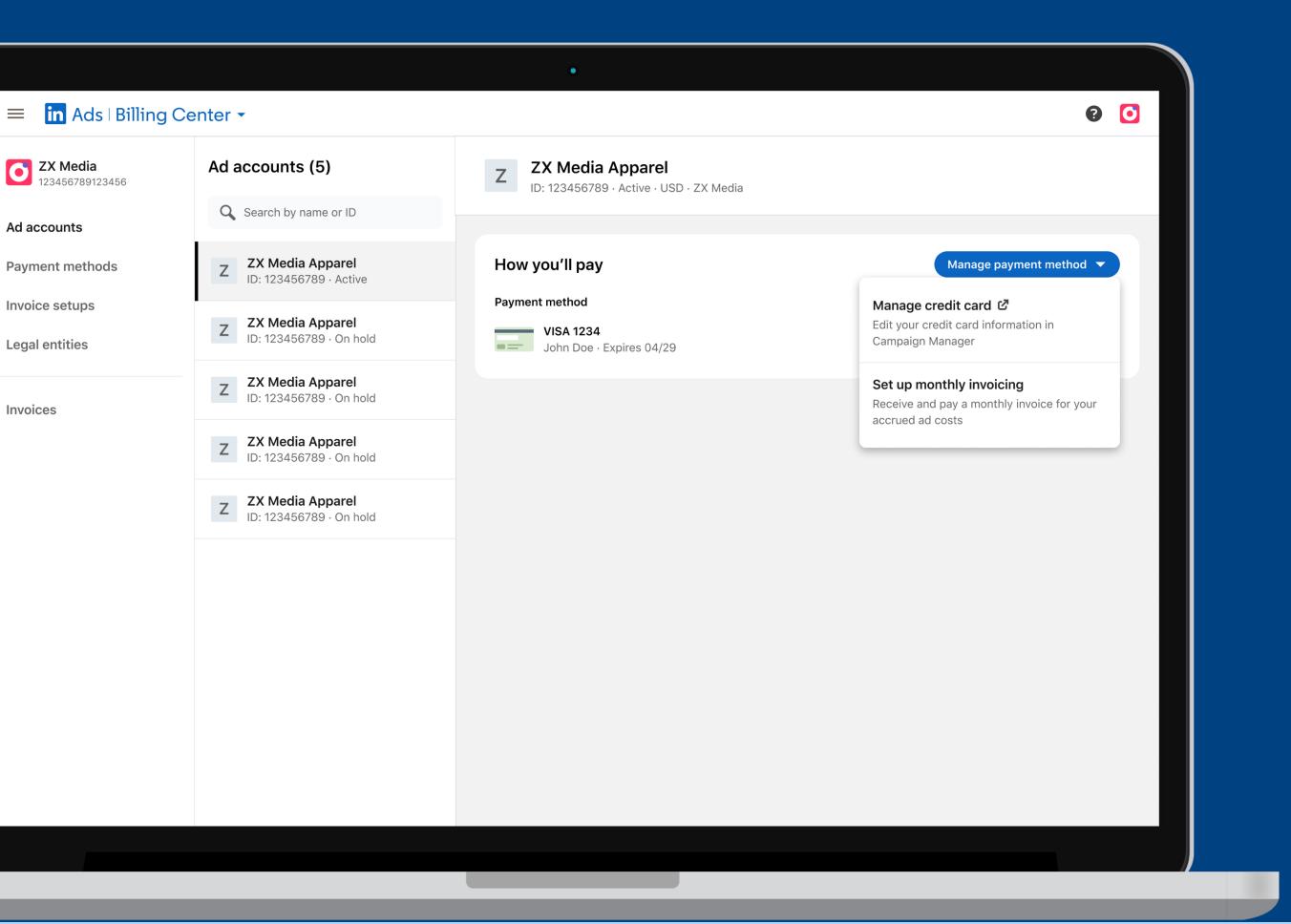




STEP 1B:

Or 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.

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STEP 2: Create an Invoice Setup

Provide your invoice details

- Name your invoice setup
- Select "My Business" if you are an advertiser and will receive and pay your own invoices.
- Select your bill-to-legal entity
- Select an existing billing address or provide a new one
- Choose billing contact. We'll reach out to them in case there are issues with your invoice or payment method.
- Add additional invoice recipients (optional)
- Provide a PO# (optional)

in Ads | Billing Center

 \leftarrow Set up monthly invoicing for: ZX Media Apparel

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de Avenue, New York, NY, 94086, United States of America	•	
23456789 · [TaxType] 123456789		

Tip: Each ad accounts requires its own invoice setup. Learn more about invoice setups here.

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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"

Ø 🧿 \equiv in Ads | Billing Center 🗸 **ZX Media** 123456789123456 Z ZX Media Apparel ID: 123456789 · Active · USD · ZX Media Ad accounts (5) **Q** Search by name or ID Ad accounts Billing setup **Billing transfers** Z ZX Media Apparel Payment methods ID: 123456789 · Active Manage invoice setup Invoice setups How you'll pay Z ZX Media Apparel ID: 123456789 · On hold Legal entities Payment method Edit current invoice setup Edit the details of this invoice setup **ZX Media Corporation** Z ZX Media Apparel ID: 123456789 · On hold Monthly invoicing Invoices Create new invoice setup Your current account balance won't transfer Z ZX Media Apparel to the new setup Invoice setup name Currency ID: 123456789 · On hold ZX Apparel Invoice Header USD Z ZX Media Apparel ID: 123456789 · On hold **Billing address** Additional invoice recipients **Billing contact** 1000 W Maude Avenue Brandon Doe kevindoe@zxmedia.com, New York NY 94086 (brandondoe@zxmedia.com) abedoe@zxmedia.com United States of America Tax ID: [TaxType] 123456789 PO 123456789

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

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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

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PO number (optional)		
123		
	3/50	
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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.

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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"



Billing address 1000 W Maude Ave, Sunnyvale, CA 94085-2810, US • + Add new address 1000 W Maude Ave Sunnyvale, CA 94085-2810 United States 1 B avenue Gustave Eiffel Andernos les Bains, Gironde 33510 France 5 Cerrada Testal mexico city Ciudad de México, CDMX 04369 Mexico 69 1/2 16th Ave SW Cedar Rapids, IA 52404-5950 United States

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 or 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.

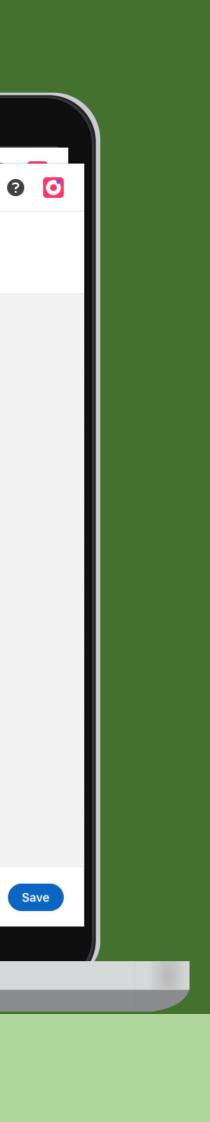
in Ads | Billing Center

ZX Apparel Invoice Header

ID: 123456789 · Active

ZX Apparel Invoice Header	
	0/64
Currency	
USD	
This invoice setup will be used for	
My 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	▼
Fax ID: [TaxType] 123456789 · [TaxType] 123456789	
Billing contact 🚱	
Brandon Doe · brandondoe@zxmedia.com 🗸	
Additional invoice recipients (optional)	
Add email +	





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 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



in Ads | Billing Center

 \leftarrow Set up monthly invoicing for: ZX Media Apparel

Invoice setup name			
ZX Apparel Invoice Header			
		0/64	
Currency			
USD			
This invoice setup will be used for			
O My business O 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			

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

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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



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ZX Media 123456789123456	Ad accounts		Add accounts 🔻
People Partners	Search by ad account name, ID, or owner		Status: All 🔻
Ad accounts	Name 🗘	Owner 🗘	Actions
Pages Matched audiences	A Ad account name ID: 123456789 • Active	[Owner]	d 🗓
Revenue attribution report	A Ad account name ID: 123456789 • Active	[Owner]	2 🗓
Settings	A Ad account name ID: 123456789 • Active	[Owner]	c7 🗓
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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.

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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.

Ø 🧿 \equiv in Ads | Billing Center 🗸 **ZX Media** 123456789123456 Invoices (20,000) Download all 🛛 🔫 Ad accounts **Q** Search by invoice number All filters Status: All 🔻 Invoice date: 9/1/2022 - 12/1/2022 -Payment methods Invoice number Status 🗘 Due date 🗘 Total amount 🗘 Ad account 🗘 Invoice date 🗘 Invoice setups ZX Media Apparel 123456789 Paid 11/1/2022 12/15/2022 \$10,000.00 ID: 123456789 Legal entities **ZX Media Apparel** 123456789 Paid 11/1/2022 12/15/2022 \$10,000.00 ID: 123456789 Invoices ZX Media Apparel 123456789 Paid 11/1/2022 12/15/2022 \$10,000.00 ID: 123456789 **ZX Media Apparel** 123456789 Paid 11/1/2022 12/15/2022 \$10,000.00 ID: 123456789 **ZX Media Apparel** 123456789 Paid 11/1/2022 \$10,000.00 12/15/2022 ID: 123456789 ZX Media Apparel 123456789 Paid 11/1/2022 12/15/2022 \$10,000.00 ID: 123456789 ZX Media Apparel 123456789 Paid \$10,000.00 11/1/2022 12/15/2022 ID: 123456789 **ZX Media Apparel** 123456789 Paid 11/1/2022 12/15/2022 \$10,000.00 ID: 123456789
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 ZX Media Apparel Applied 11/1/2022 12/15/2022 -\$10,000.00 ID: 123456789 123456789 Credit memo **ZX Media Apparel** Applied 11/1/2022 12/15/2022 -\$10,000.00 ID: 123456789

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.



"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.

this period"

Will I be required to use Business

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

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 \bullet 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 l activate my account for monthly invoicing?

- 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
- You don't have any invoicing payment 3. methods set up – Apply for monthly invoicing.

There are 3 likely reasons you cannot activate your account 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 ulletand 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 ulletpaying 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 ulletbe billed directly for their ad costs, the client should setup billing for their ad account directly.







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 Steps 1-2 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 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 and 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 it's status in 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 in 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

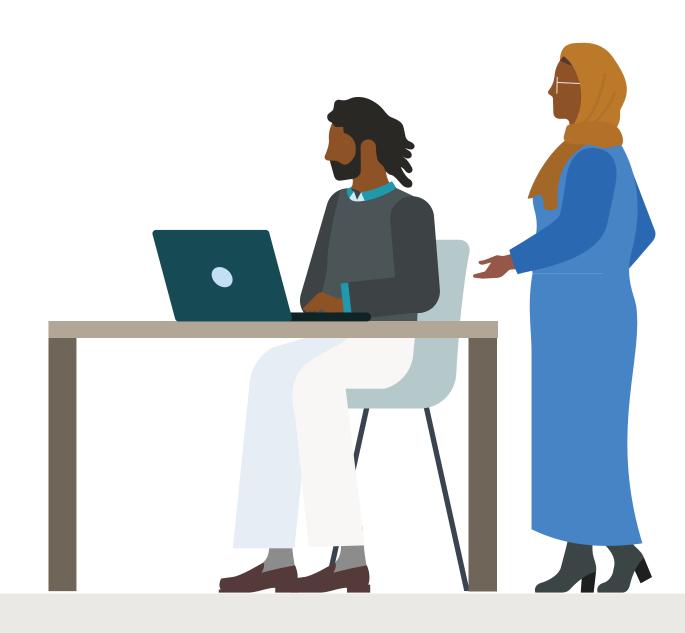
How do I update my Tax ID?

• 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!

