



Monthly Invoicing Getting Started Guide

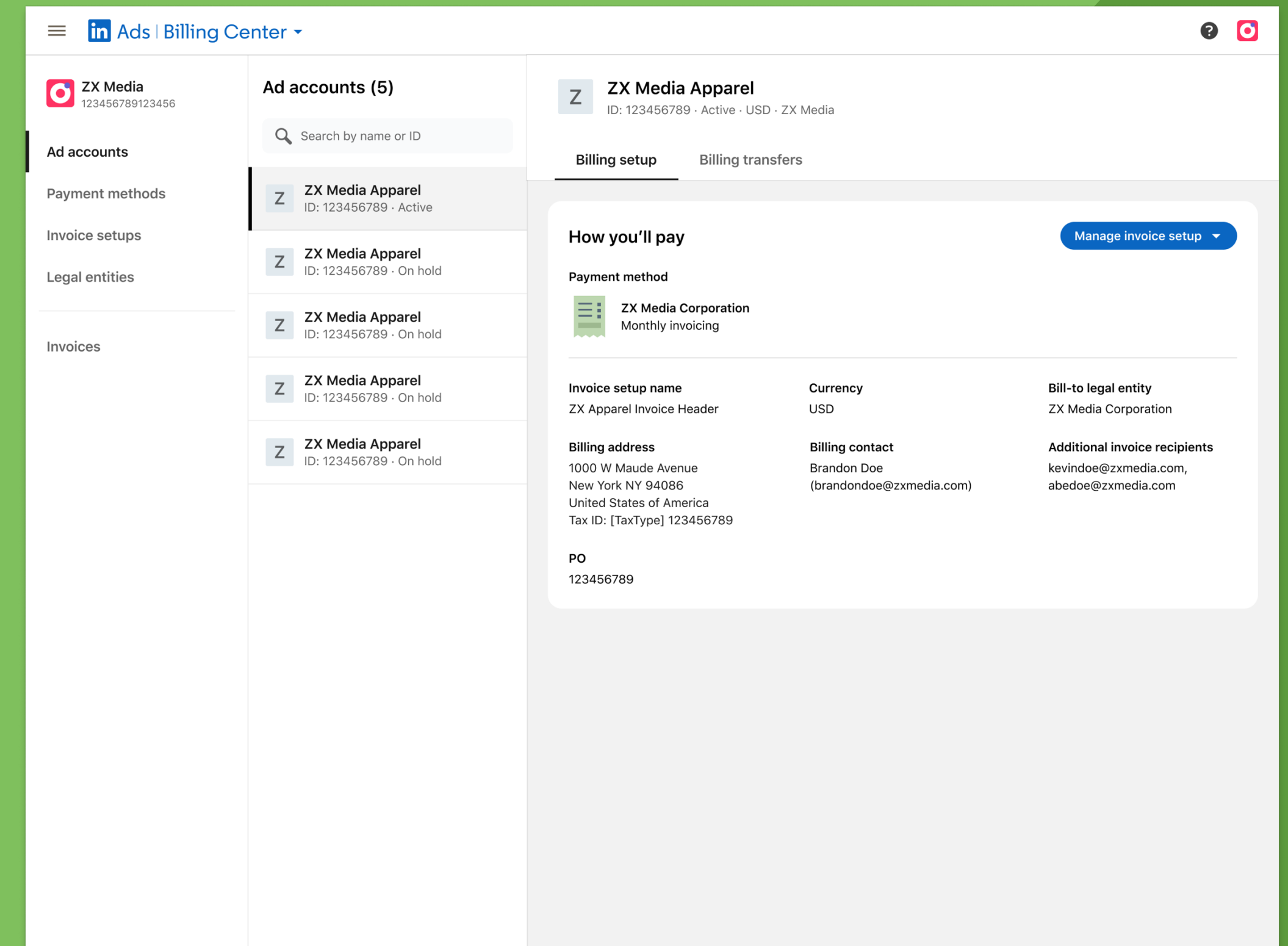
Introducing our New Self Serve
Invoicing Experience



New! Monthly Invoicing Made Simple

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

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



Streamline your LinkedIn Billing experience

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

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

1.

Setting up your Business Manager

If you already have Business
Manager, skip to [slide 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 [here](#).

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

2.

Getting started with self-serve invoicing in Business Manager

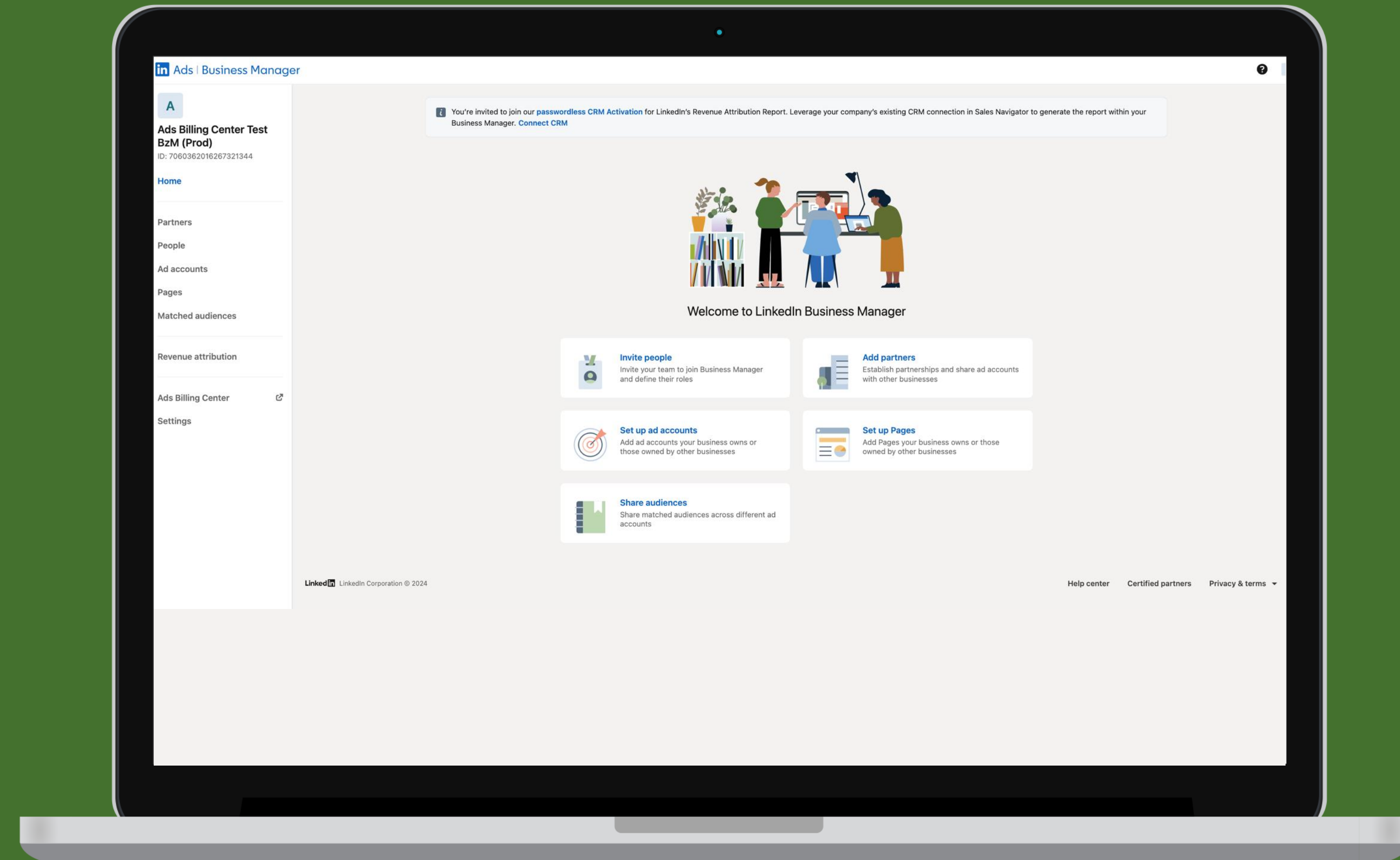


STEP 1:

Navigate to the Ads Billing Center

Log in to Business Manager

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

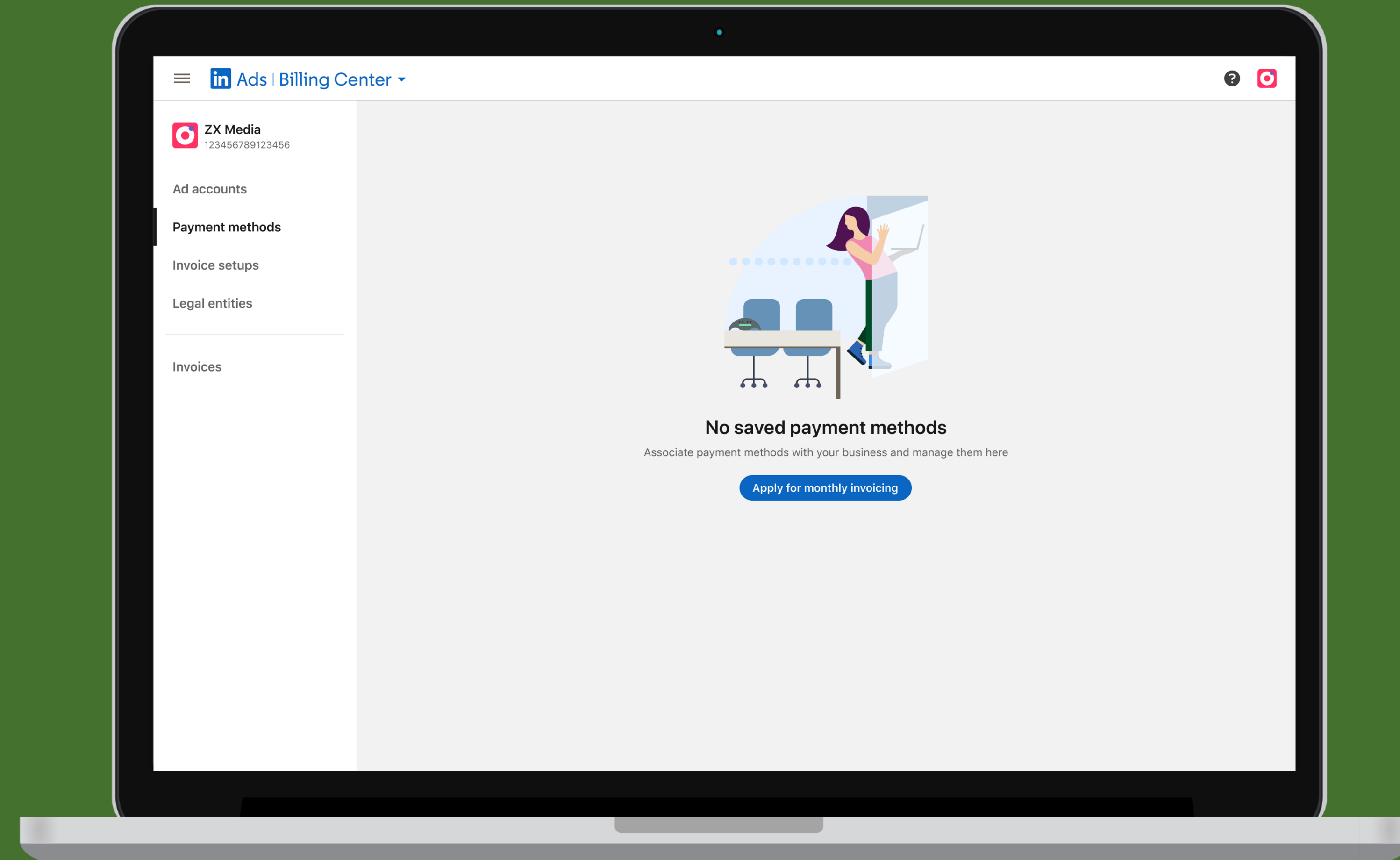


STEP 2:

Ensure you're Qualified for Monthly Invoicing

Are you able to apply for invoicing?

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

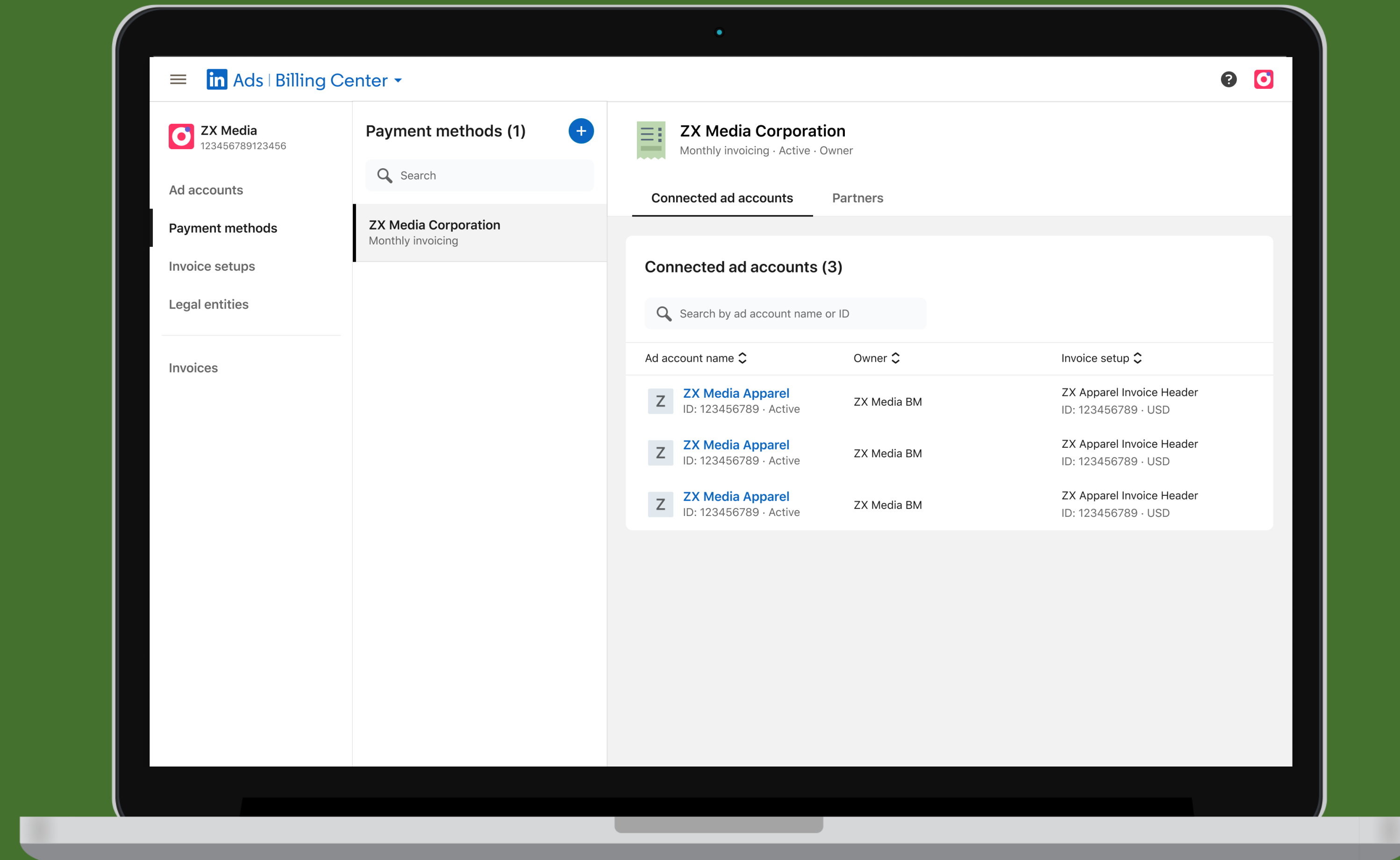


Tip: All customers must complete an invoicing application in order to make changes to their invoice setups, regardless of current invoicing status.

STEP 3:

Apply for a new monthly invoicing payment method

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

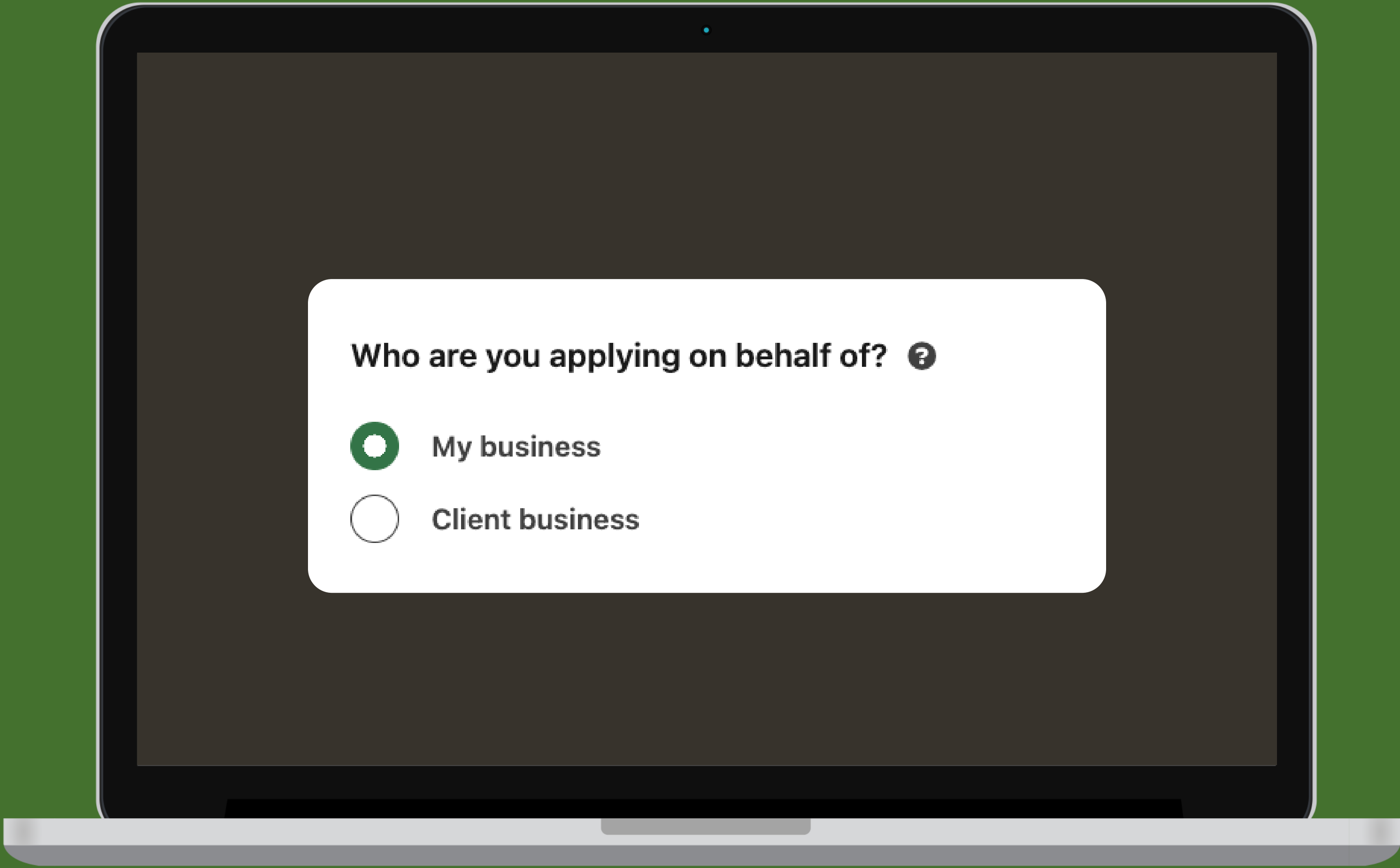


STEP 4:

Complete a Monthly Invoicing Application

Apply on behalf of your business

- 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.

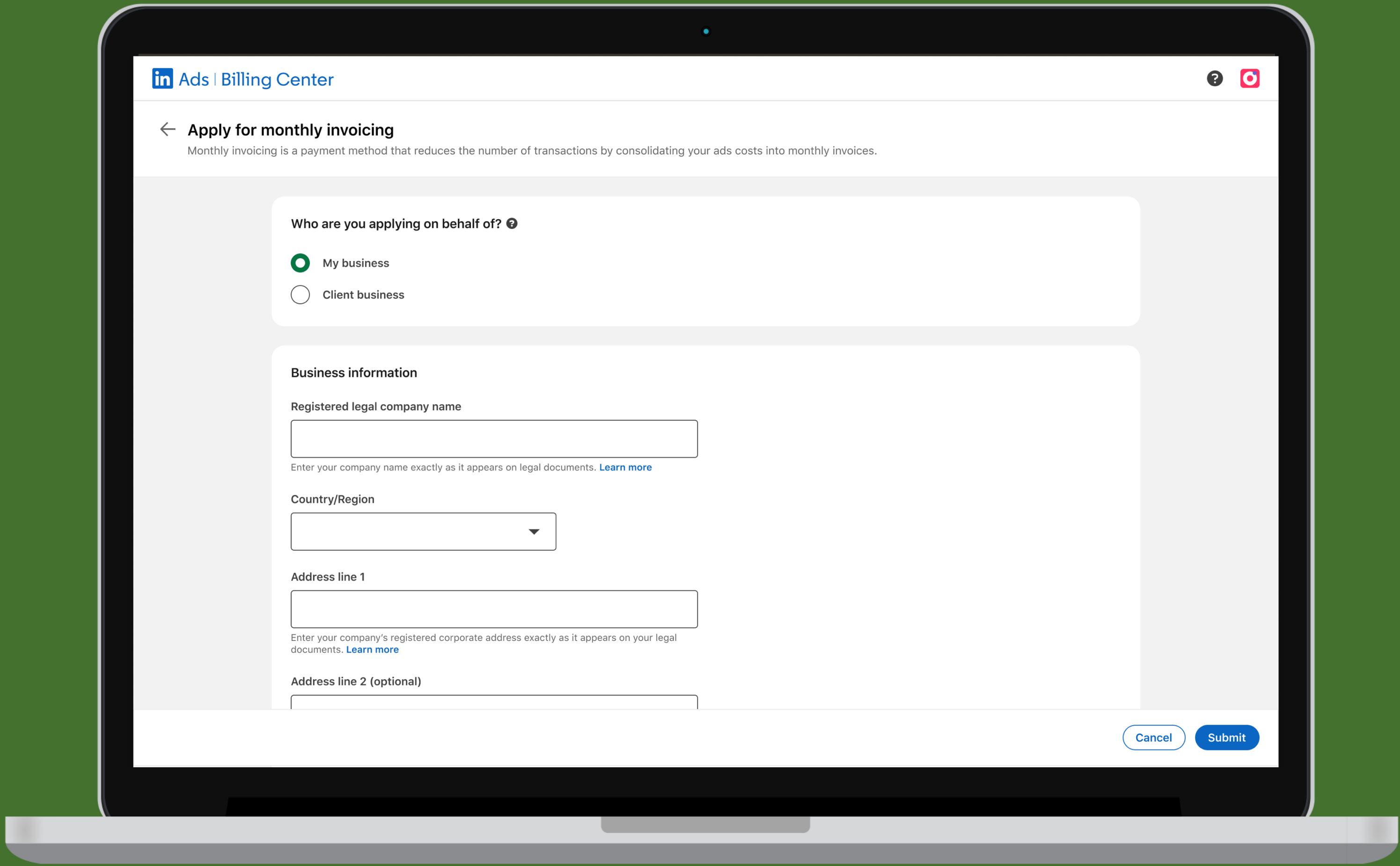


STEP 5:

Complete a Monthly Invoicing Application

Apply on behalf of your business and create your Legal Entity

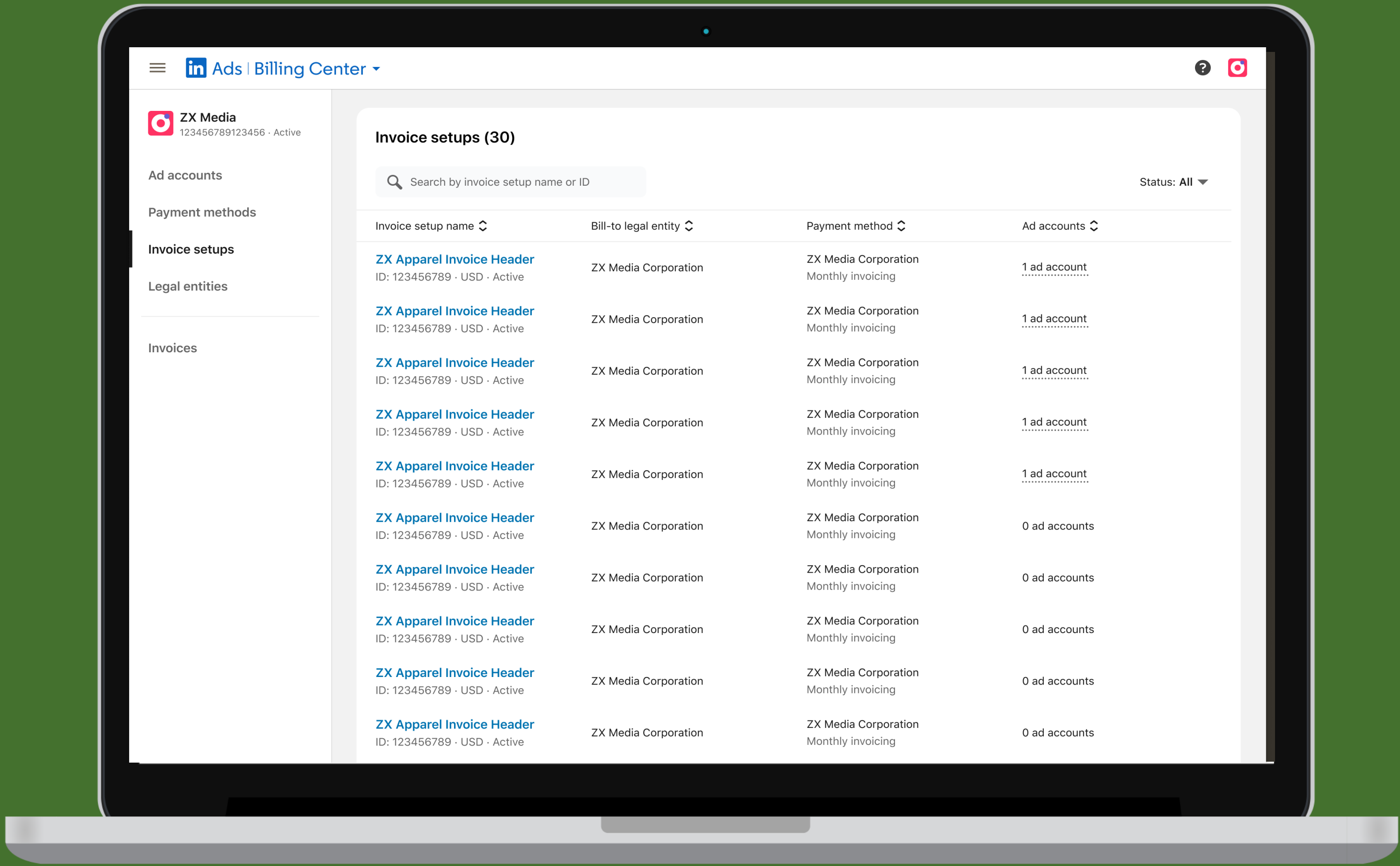
- Complete the application form and follow the prompts
- Be sure the information you include such as Company Name and Address appear exactly as they do on legal documents.
- Once you submit your application, you will receive a confirmation email. You will be able to view the status of your request on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



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

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

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



Tip: 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.

3.

Claiming your Invoice Setups

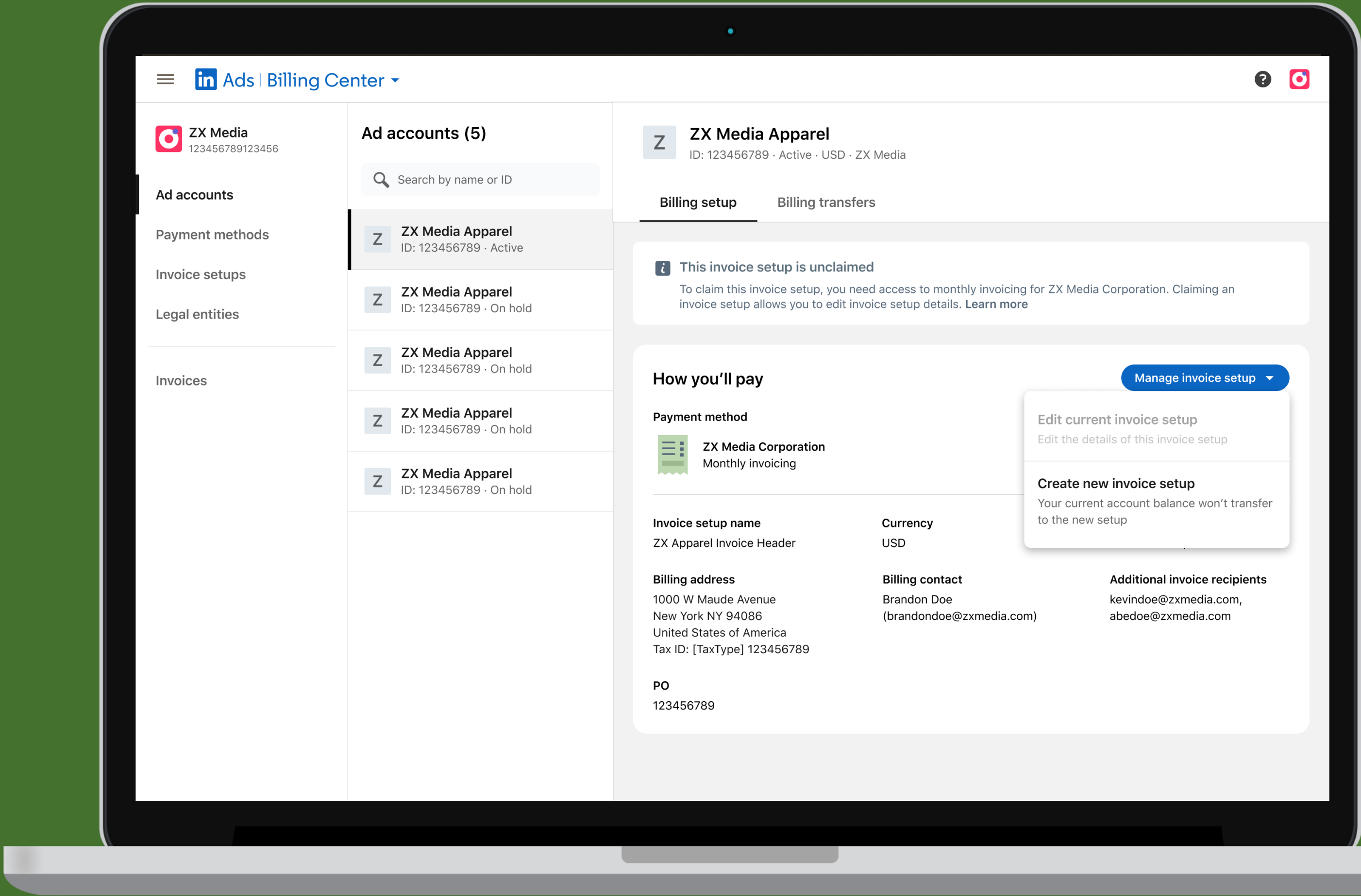


STEP 1:

Claim your Invoice Setups

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

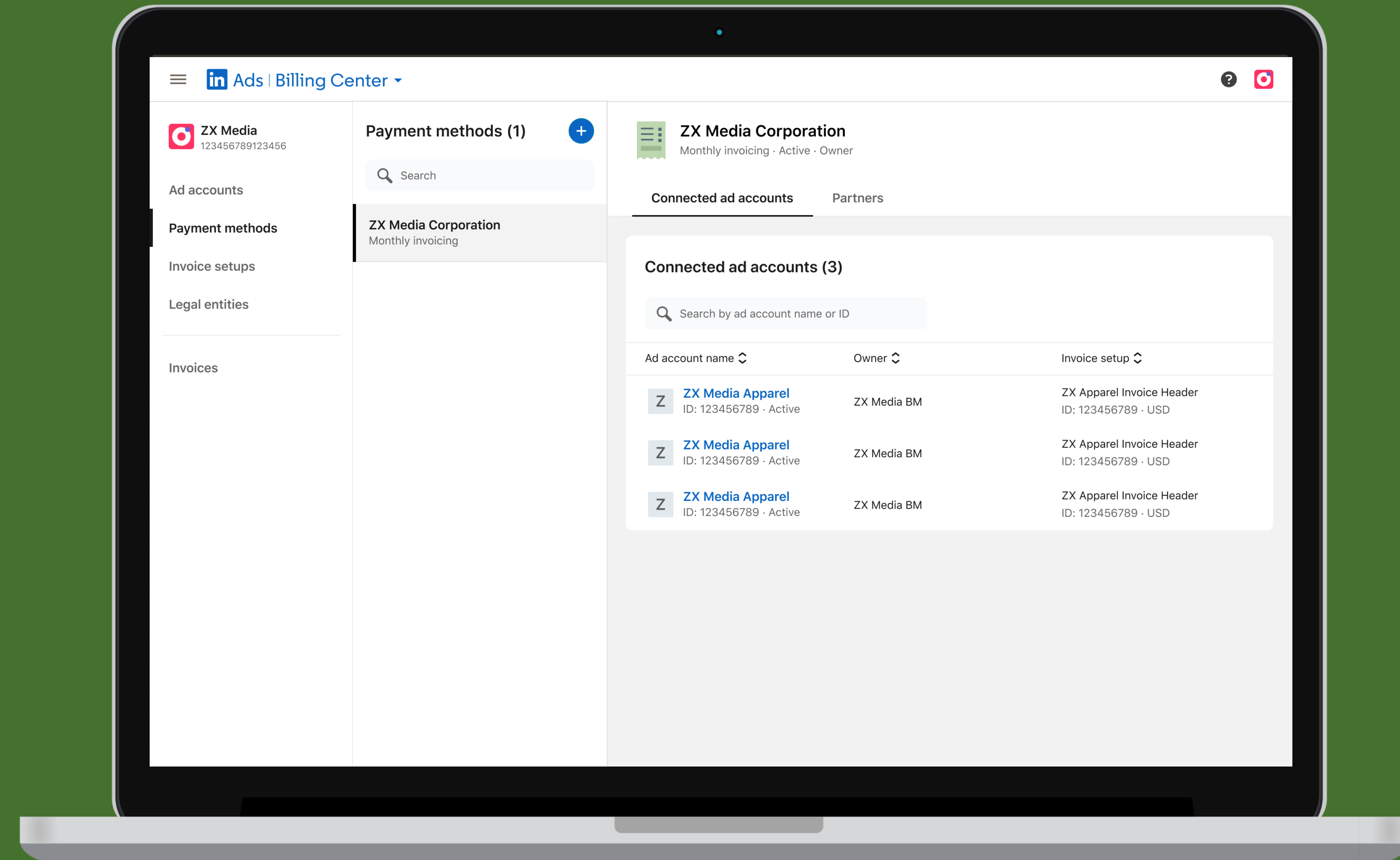
An invoice setup must be claimed before you can edit it. However, you can always create a new invoice setup for your ad account to change the billing setup for an ad account using monthly invoicing payment methods that you already have access to.



STEP 2:

Claim your Invoice Setups

- To claim an invoice setup, you must have access to the legal entity and payment method used in that invoice setup.
- Complete an invoicing application for this legal entity to get access by following steps 1-5 in Section 2 of this Getting Started Guide
- Once you meet the above criteria, the invoice setup will automatically be claimed by your Business Manager and appear on your invoice setups tab.



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

4.

Setting up Ad Accounts for Monthly Invoicing

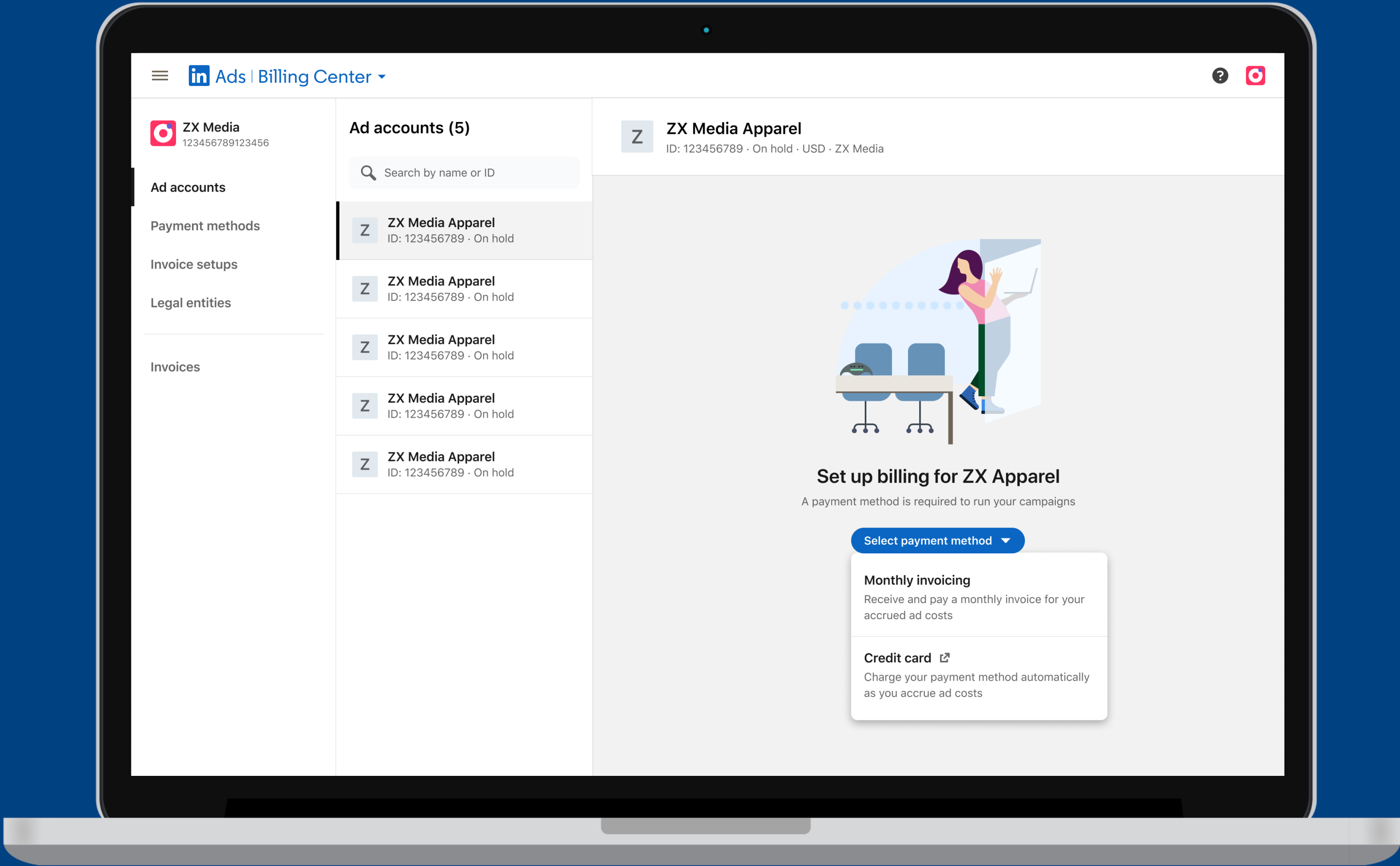


STEP 1A:

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”

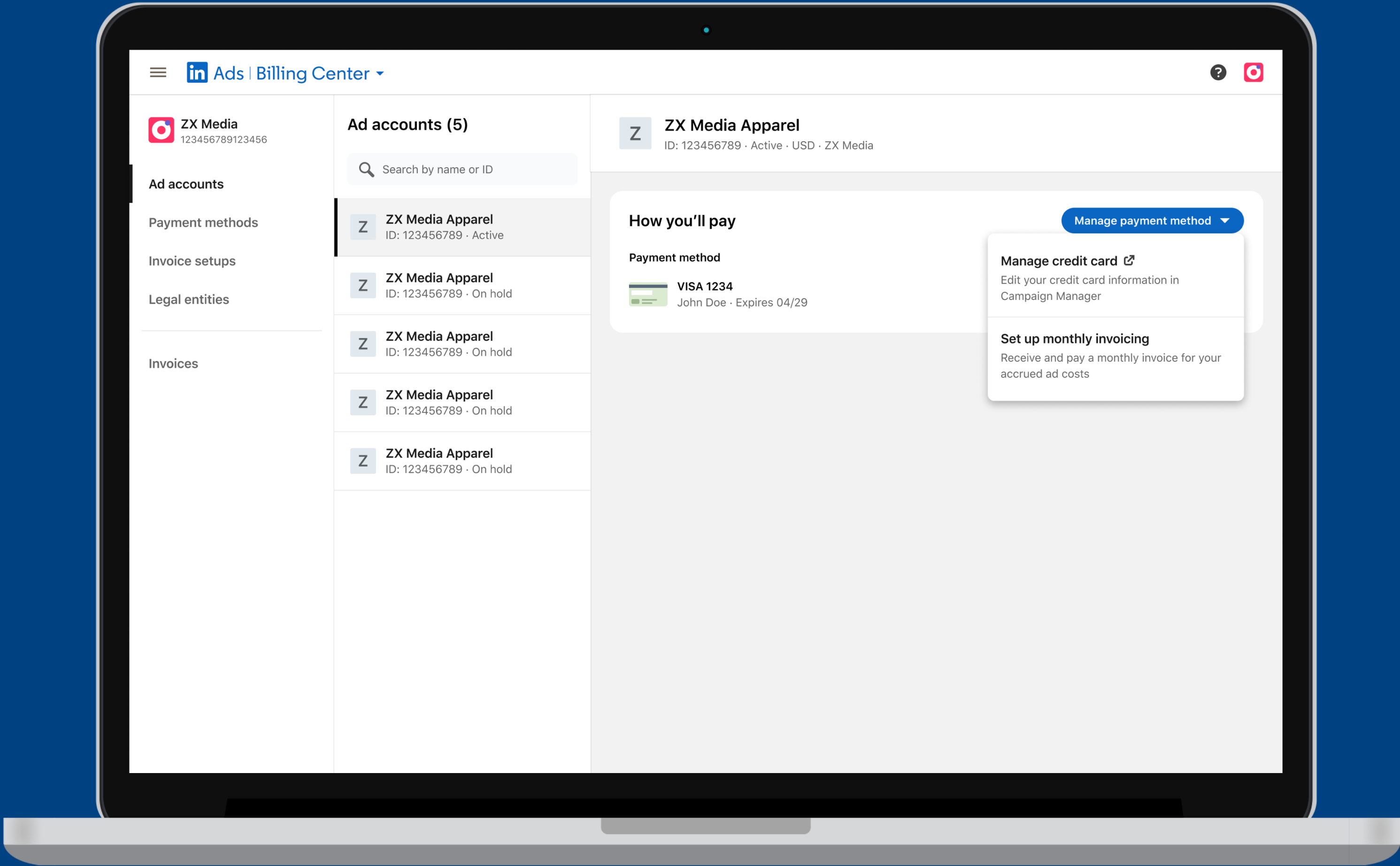


Tip: You’ll only see Ad Accounts that are already claimed by your Business Manager or shared at the Billing Admin level. If you don’t see the Ad Account you’re looking for, head back to Business Manager to claim it. Learn more about claiming ad accounts in Business Manager [here](#).

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”



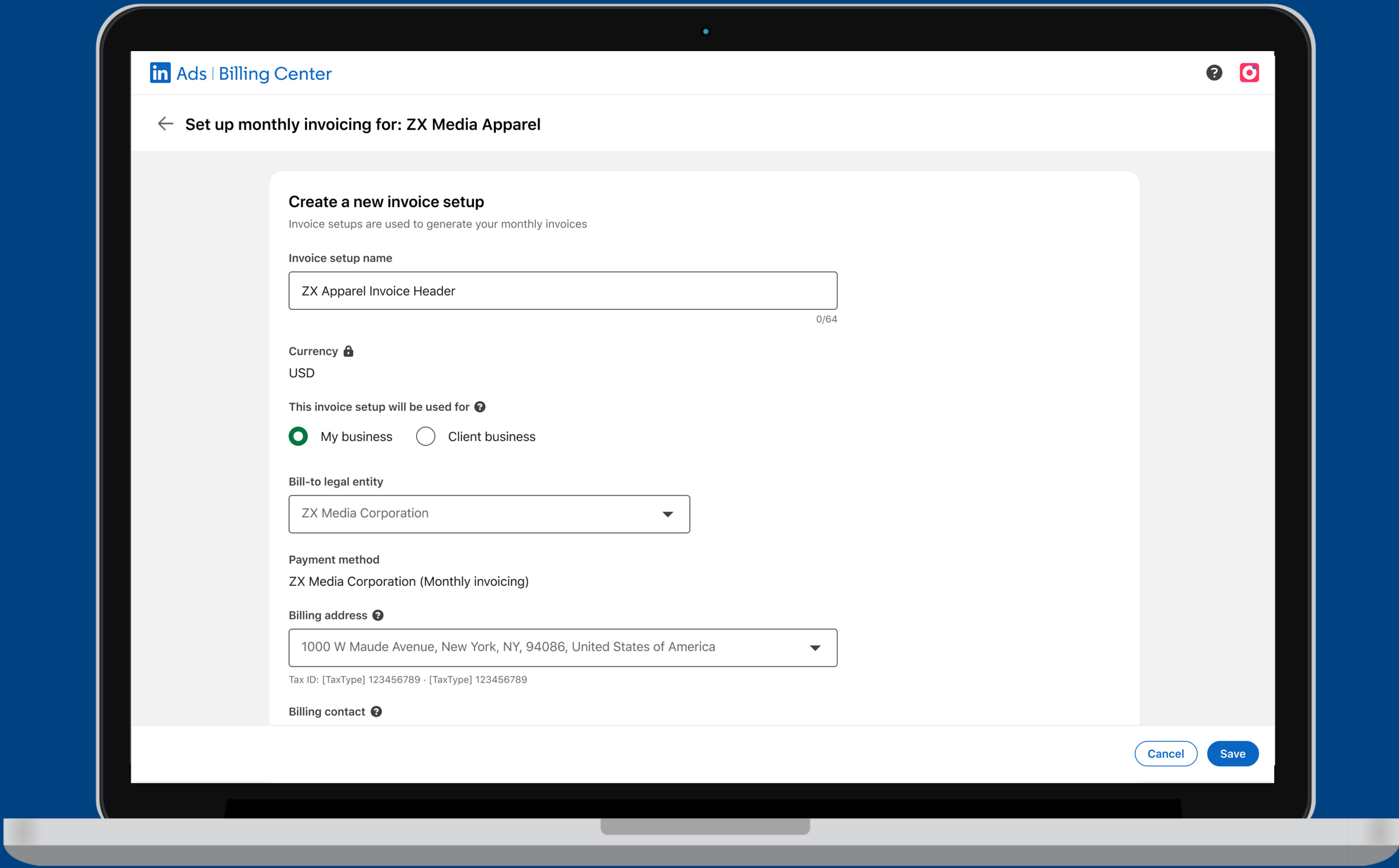
Tip: Once you transition your payment method from Credit Card to Invoicing, this action CANNOT be undone.

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)



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

5.

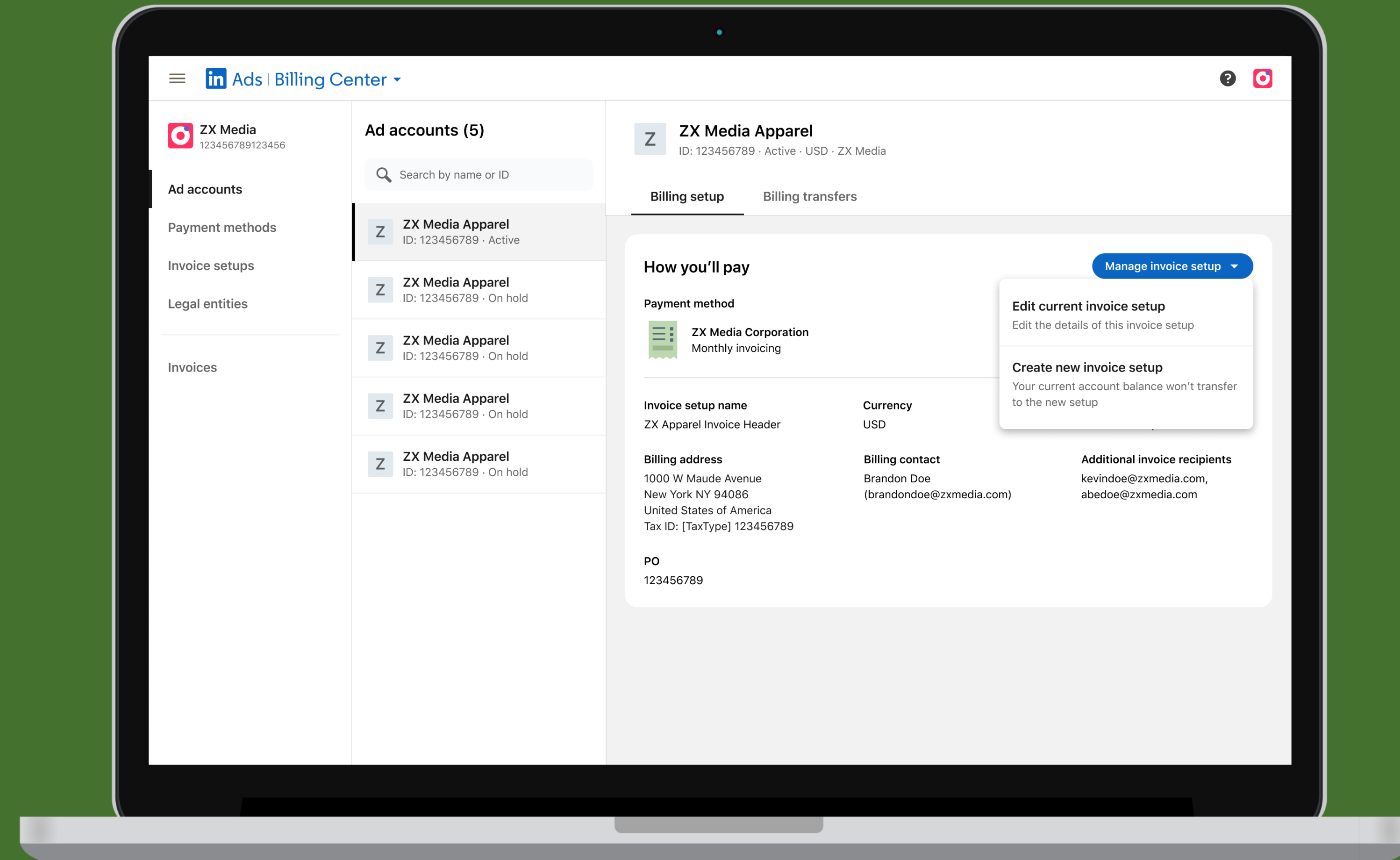
Change how
your ad account
is billed



STEP 1:

Select the Invoice Setup you wish to change

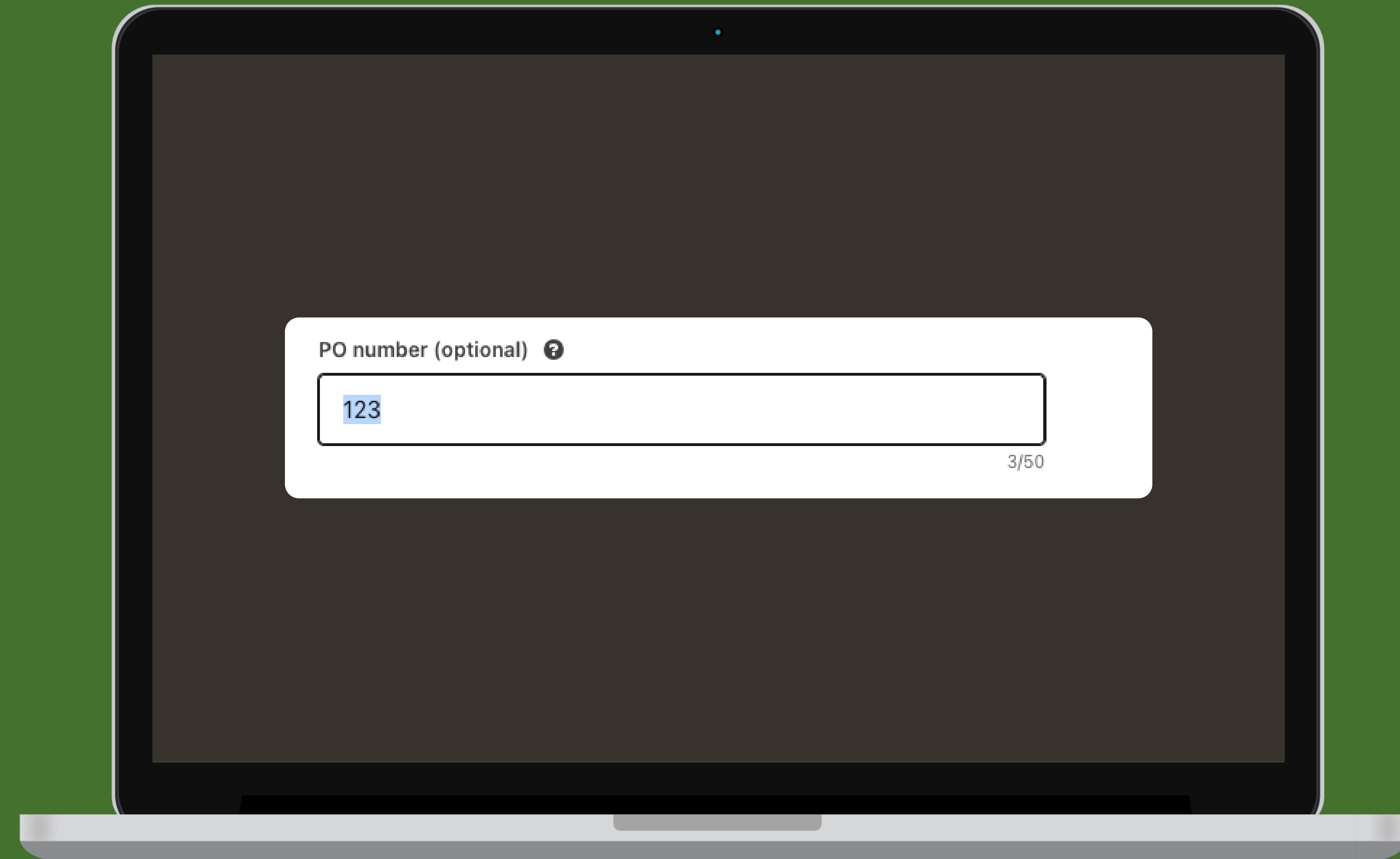
- Navigate to the “Ad Accounts” tab on the lefthand side of the screen
- Select the Ad Account whose invoice setup you wish to change
- Click “Manage Invoice Setup” and “Edit current invoice setup”



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

Edit PO#s

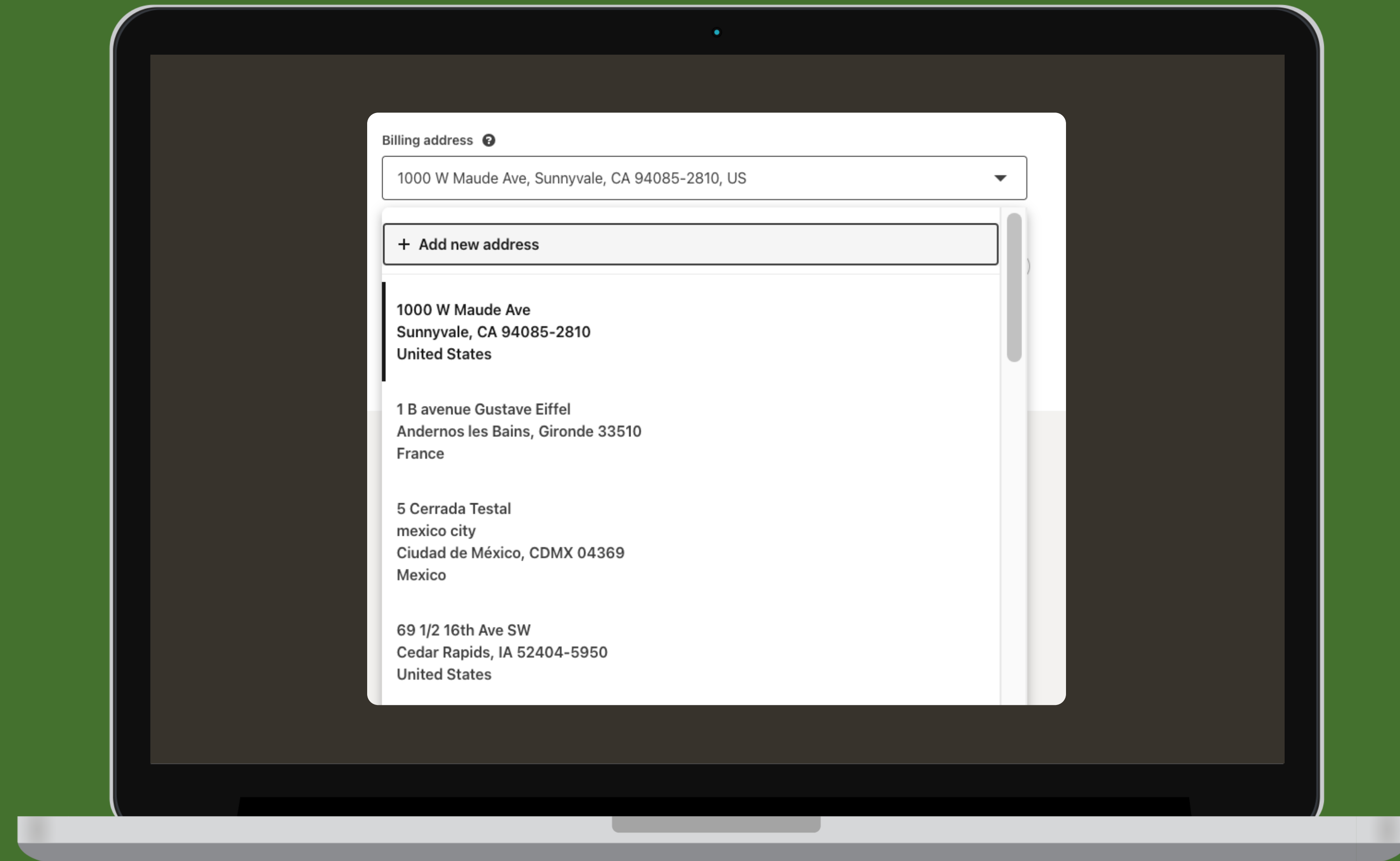
- Select the ad account you'd like to make changes to and then select "Manage Invoice Setup"
- From there you will see the PO# editable field
- Make your desired changes to your PO# and click "Save"
- These changes will be immediately applied to your account



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

Change your billing address

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

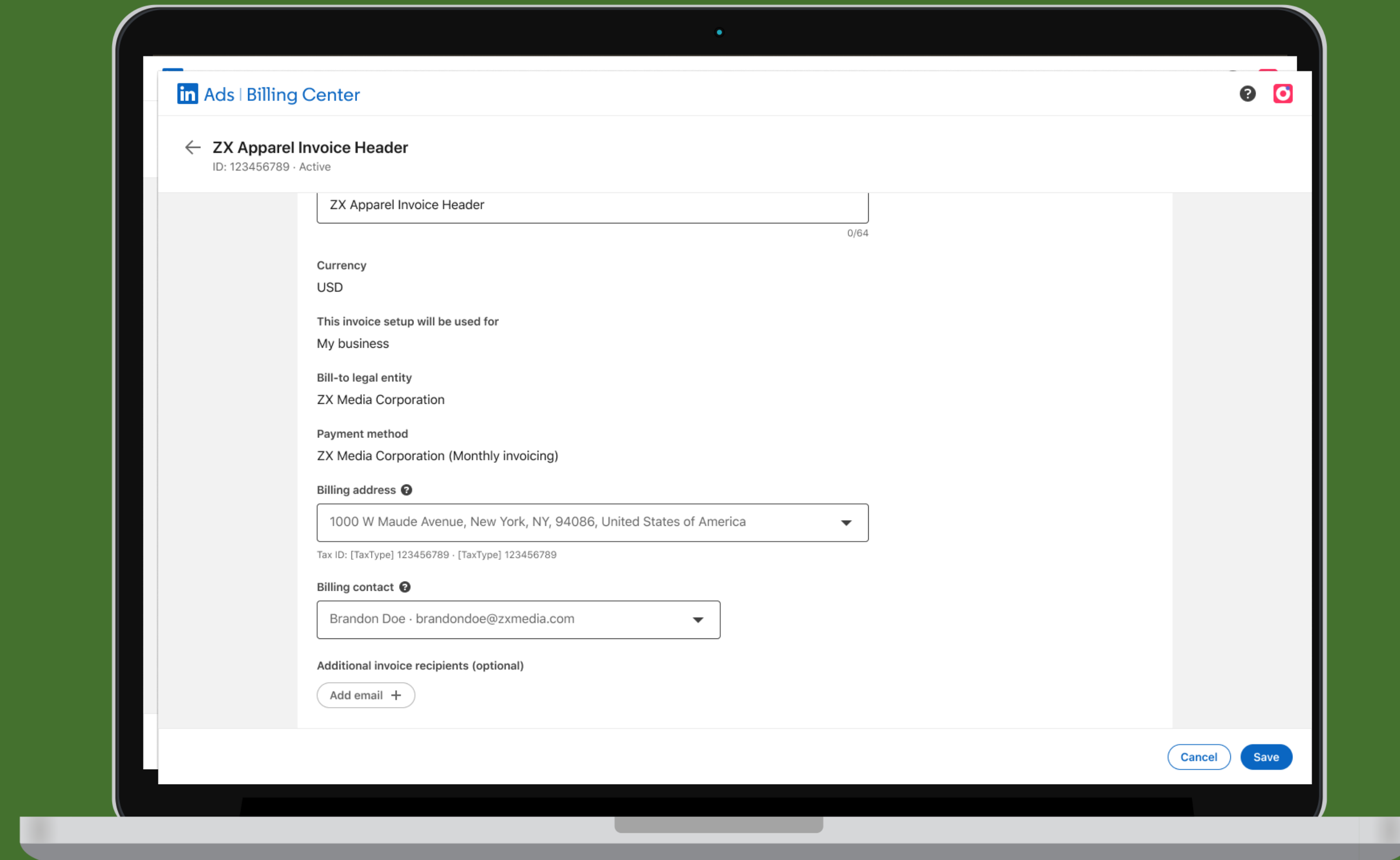


Tip: : If you need to change the bill-to legal entity or billing region for your Ad Account, you **MUST** create a new invoice setup. Follow the instructions in Section 3 to do so.

Add, change, or remove invoice recipients

Edit your invoice setup

- Remove existing invoice recipients 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.



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

← Set up monthly invoicing for: ZX Media Apparel

Create a new invoice setup
Invoice setups are used to generate your monthly invoices

Invoice setup name
ZX Apparel Invoice Header 0/64

Currency
USD

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

Bill-to legal entity
ZX Media Corporation ▼

Payment method
ZX Media Corporation (Monthly invoicing)

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

Tax ID: [TaxType] 123456789 - [TaxType] 123456789

Billing contact

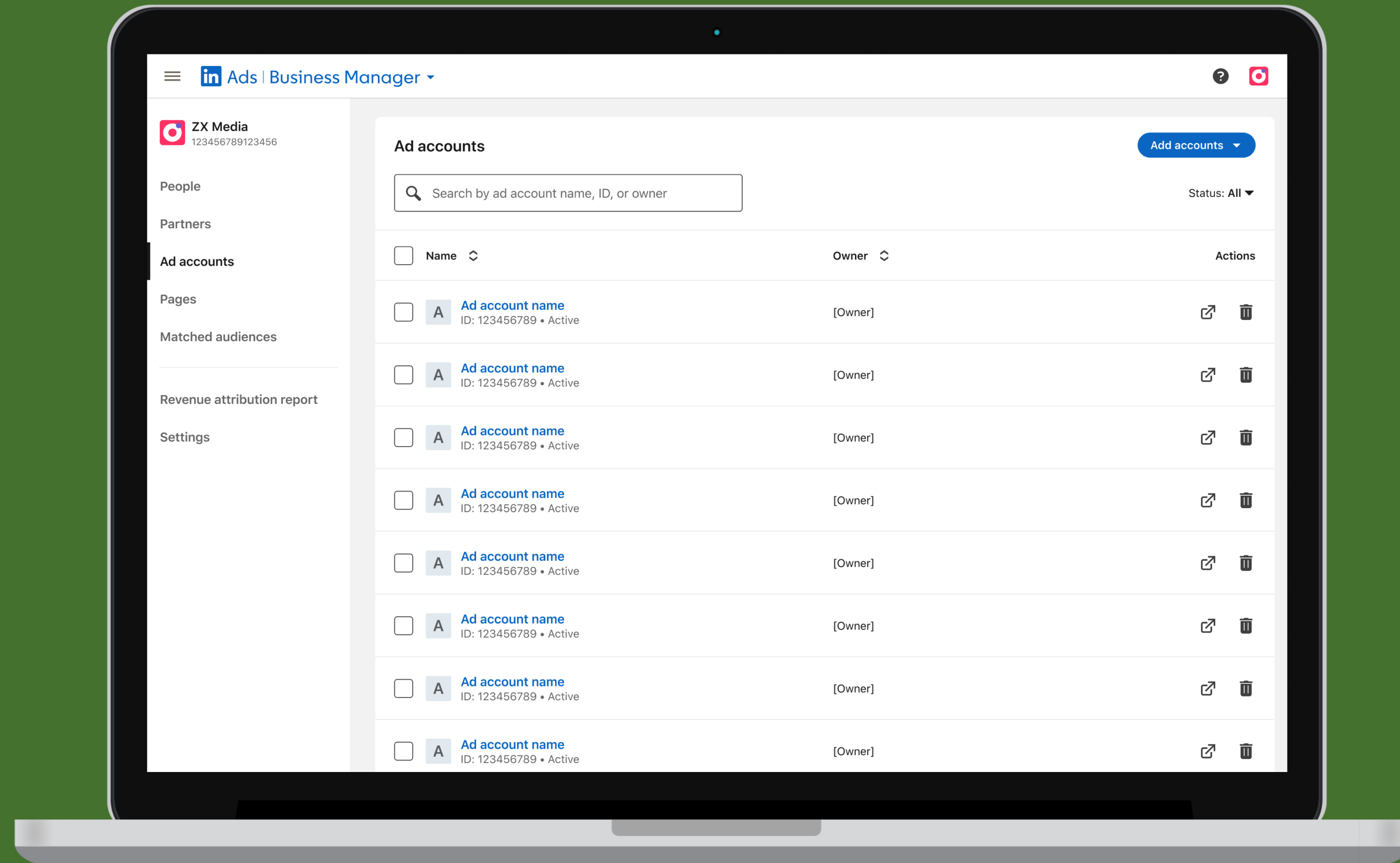
Cancel Save



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

Removing Invoiced Accounts from Business Manager

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



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

6.

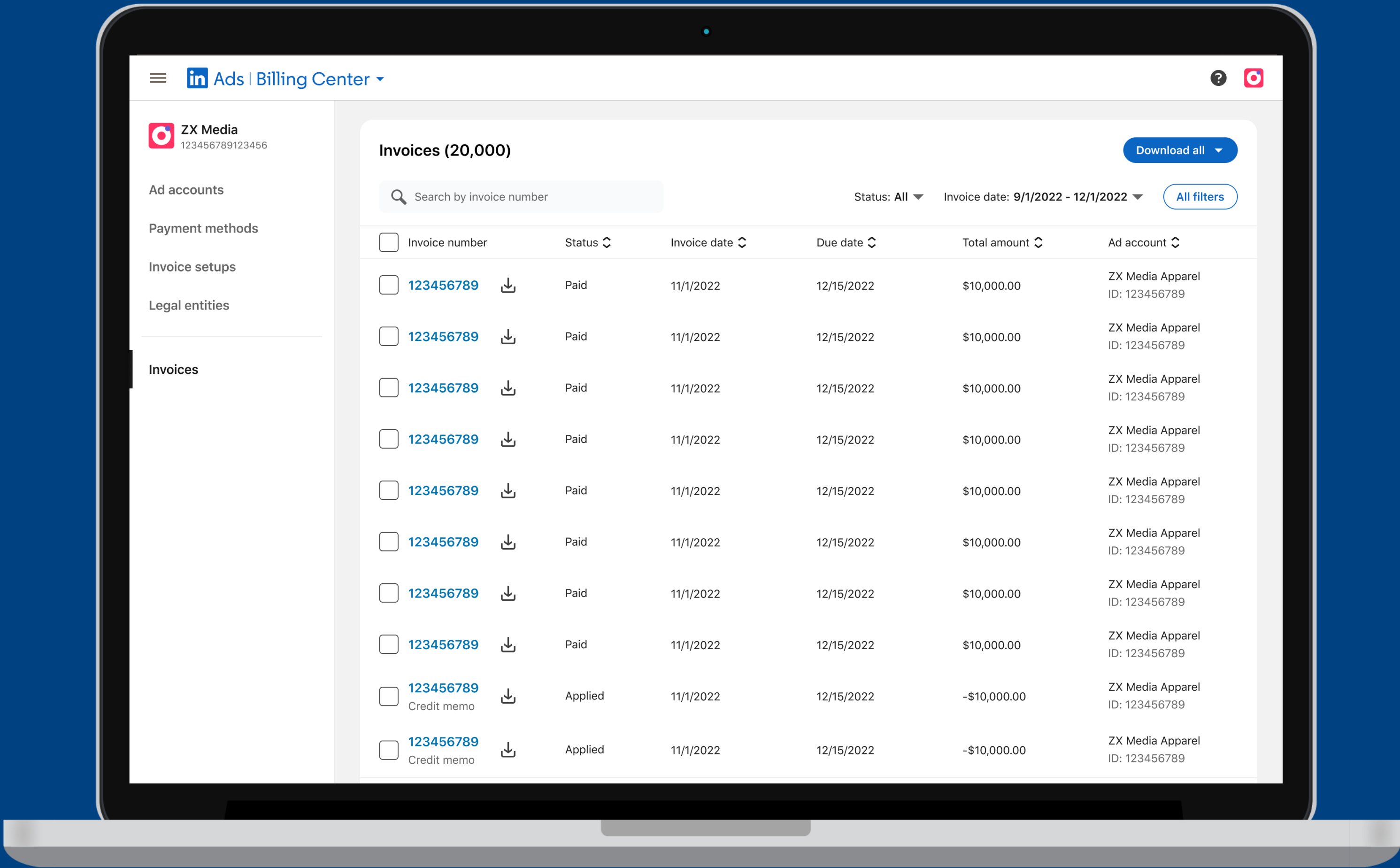
Downloading your Invoices from Business Manager



Downloading your invoices from Business Manager

Simplify reconciliation with the Invoice Dashboard

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



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

7.

FAQs & Troubleshooting



FAQs:

Business Manager & Ads Billing Center

✓ Why Business Manager?

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

✓ Will I be required to use Business Manager?

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

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

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

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

FAQs:

Setting up Monthly Invoicing

✓ Who qualifies for Monthly Invoicing?

To qualify for monthly invoicing you must:

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

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

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

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

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

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

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

FAQs:

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 be able to edit an invoice setup:

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

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

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

FAQs:

Making Changes to your Legal Entity

✓ How do I update my Tax ID?

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

✓ How do I change my Billing Contact?

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





Thank you!