

# Guidelines for Checking Self-Service Clients with Incorrect Billing Settings in PowerBI

## Objective:

To ensure correct auto-billing settings for self-service accounts, which will result in accurate automatic invoice generation. Sometimes campaigns are run for self-service accounts, but the billing settings under company profile remain configured for managed clients. This task ensures that settings are corrected promptly.

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## Frequency:

- **Check the report at least twice a month.**
  - **Mandatory check during the last days of the month** before monthly billing to avoid errors.
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## Steps to Follow:

1. **Access the Report** on PowerBi called "Self service deals"

The report can be accessed via this [Power BI link](#).

2. **Filter the Report**

- Look for the "Not Automated Deals Spend Tracking" section.
- Set the **month filter** to "Current" to review the latest data.

Self service deals | Data updated 27/09/24

Search

Pages

Automated deals spend...

Closed self service deals...

Not automated deals

Summary

File | Export | Share | Chat in Teams | Get insights | Subscribe to report | Set alert | Copilot

Year

Month name

Team lead

Sales person

Company name

User name

Campaign ID

2024

Current

All

All

All

All

All

Sales person	Company name	User name	Current month spend	Total spend until chosen date	Total budget
Ruslanas Lisovskij	Ad Planet Labs OU	ADP IPlace - NOVUS	273	273	323
		ADP UMWU Ukraine - Mazda	147	147	233
		ADP IPlace - FADO	119	119	349
		ADP Groupm - Bepanthen	22	22	27
		Total	4,229	5,551	7,958
GlobalDigital LLC		GD Starcom - Visa	925	925	5,104
		GD AlpenPharma - Gastritol UAH	883	883	1,302
		GD Dentsu - Toyota	245	622	1,761
		GD Favbet	593	593	737
		GD Mediafirst - KFC	506	506	1,307
		GD TerraMedia - PidBirua	355	495	686
		GD Dentsu - Metro	303	303	1,250
		GD Dentsu - Hygia	210	210	419
		GD GUR	140	140	897
		GD Initiative - Velo	115	115	114
		GD MDAgency - Nova Poshta	51	51	152
		GlobalDigital	0	0	6
Total	4,325	4,842	13,735		
Total			8,554	10,393	21,693
Asmae Zahir	Ideas Link Mexico S.A. de C.V.	Link Studio	13	13	110
		Total	13	13	110
Total			13	13	110
Total			8,567	10,406	21,803

### 3. Identify Accounts

The report will show accounts that have spent money but whose company profile settings are incorrect. These accounts need to be addressed.

### 4. Update Company Profile Settings on DSP

If accounts are found with incorrect settings, take the following actions in the company profile:

- Change the **auto-billing settings** as required.

#### Before Changes:

The company profile will show the incorrect settings for managed clients.

Client auto-invoicing profile

Non-auto invoicing users

Link Studio

Reason for Non-Auto Invoicing

Select a reason

Client auto-invoicing profile

+ x

Auto billing users?

Select any

When invoice should be generated?

☐ End of month (+interim invoices) ⓘ
 ☐ End of IO budgets spend (campaign status = complete) ⓘ

How group invoice media budgets?

☒ One line "DSP services" (default) ⓘ
 ☐ By media budget and country ⓘ
 ☐ Group all client accounts under one invoice (always a new IO+invoice(dedicated for self-service)) ⓘ
 ☐ Group all client io's under one invoice ⓘ
 ☐ Grouping by account and IO ⓘ

☒ Is default

☐ Send invoices automatically

Form navigation

General Information

Discounts & Taxes

Rebate payment term

Rebates

Client auto-invoicing profile

Credit limit

Factoring

Eskimi billing entity

Contract detail

Buttons

Profile finance status ⓘ

Credit limit level: \$0.00 / \$5,000.00

Company type: Self-service

Finance balance: \$0.00

Overdue: 0.00

Last invoice:

Last payment:

Open IOs:

Open IOs amount: \$0.00

Agreement status: Signed

Discount: 0.00%

Rebate: 0%

Bonus: 0.00%

Tax: 0.00%(i.e. WHT)

Currency rate: USD1.00

After Changes:

Client auto-invoicing profile

Non-auto invoicing users

Reason for Non-Auto Invoicing  
Select a reason

Client auto-invoicing profile + X

Auto billing users?  
Link Studio

When invoice should be generated?  
☒ End of month (+interim invoices) ⓘ  
☐ End of IO budgets spend (campaign status = complete) ⓘ

How group invoice media budgets?  
☐ One line "DSP services" (default) ⓘ  
☐ By media budget and country ⓘ  
☒ Group all client accounts under one invoice (always a new IO+invoice(dedicated for self-service)) ⓘ  
☐ Group all client io's under one invoice ⓘ  
☐ Grouping by account and IO ⓘ

Select client main account for IO/Invoice  
Link Studio

☒ Is default  
☐ Send invoices automatically

General Information

Discounts & Taxes

Rebate payment term

Rebates

Client auto-invoicing profile

Credit limit

Factoring

Eskimi billing entity

Billing entity change history

Contract detail

Buttons

Profile finance status ⓘ

Credit limit level: \$0.00 / \$0.00

Company type: Self-service

Finance balance: \$0.00

Overdue: 0.00

Last invoice:

Last payment:

Open IOs:

Open IOs amount: \$0.00

Agreement status: Signed

Discount: 0.00%

Rebate: 0%

Bonus: 0.00%

Tax: 0.00%(i.e. WHT)

Currency rate: USD1.00

The profile should be updated as follows:

- **End of Month Billing** selected.
- **Third Grouping** chosen.
- The appropriate **account for invoice generation** selected.
- Ensure all updates are properly saved and attached to the respective company profiles.

## 5. Exceptions

- Internal accounts or users, such as *Eskimi - Artem P., Test*, do not require these changes.

## Reminder:

This task should be done **at least twice a month** and especially **towards the end of the month** before the monthly billing to ensure no errors in invoice generation.

Revision #5

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