

# 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

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.

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