

# 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...

Year: 2024 | Month name: Current | Team lead: All | Sales person: All | Company name: All | User name: All | Campaign ID: All

Not automated deals s...

Sales person	Company name	User name	Current month spend	Total spend until chosen date	Total budget		
Summary							
Rustanas Lisovskij	Ad Planet Labs OU	ADP IPlace - NOVUS	273	273	323		
		ADP UMWV Ukraine - Mazda	147	147	233		
		ADP IPlace - FADO	119	119	349		
		ADP Groupm - Bepanthen	22	22	27		
		<b>Total</b>	<b>4,229</b>	<b>5,551</b>	<b>7,958</b>		
		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				
<b>Total</b>	<b>4,325</b>	<b>4,842</b>	<b>13,735</b>				
<b>Total</b>	<b>8,554</b>	<b>10,393</b>	<b>21,693</b>				
Asmae Zahir	Ideas Link Mexico S.A. de C.V.	Link Studio	13	13	110		
			<b>Total</b>	<b>13</b>	<b>13</b>	<b>110</b>	
<b>Total</b>	<b>Total</b>	<b>Total</b>	<b>13</b>	<b>13</b>	<b>110</b>		
<b>Total</b>	<b>Total</b>	<b>Total</b>	<b>8,567</b>	<b>10,406</b>	<b>21,803</b>		

### 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



### 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

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### 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

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**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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