

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.

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		27	
Pages		File Export Share Chat in Teams Get insights Subscribe to report Set alert		Copilot			
Automated deals spend...	Year	Month name	Team lead	Sales person	Company name	User name	Campaign ID
Closed self service deals...	2024	Current	All	All	All	All	All
Not automated deals s...							
Summary	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	Total	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

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Eskimi billing entity

Billing entity change history

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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.

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