



Self Serve IO (order line creation / editing in Ads Manager)

SS IO (order line creation/editing) is a new feature in Pinterest Ads Manager that allows you to create and modify existing order lines. This allows you to have self-serve capabilities, without requiring assistance from your Pinterest sales rep.

Key value propositions

- You will be able to create order lines in Ads Manager (if you have previously spent with Pinterest) that can be immediately activated against. This streamlines the IO process significantly, allowing you to start spending immediately for time-sensitive campaigns or for last minute budgets.
- You will be able to make edits to existing order lines in Ads Manager. Specifically, this allows order lines with a nearing end date or exhausted budget to be modified immediately.

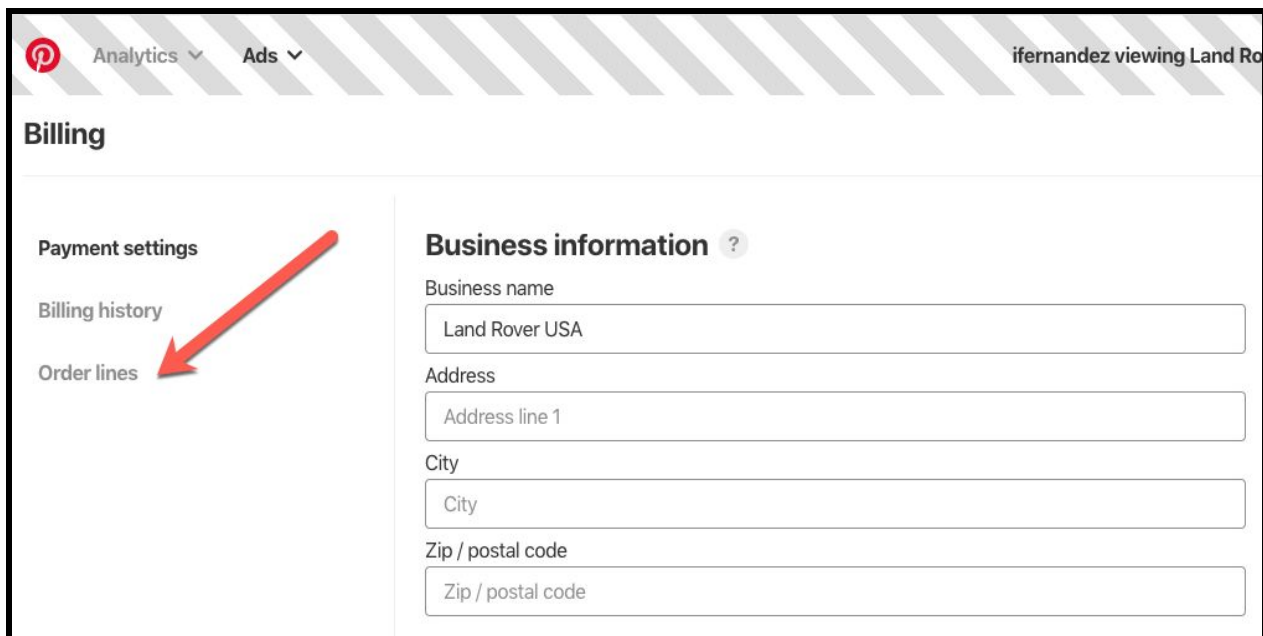
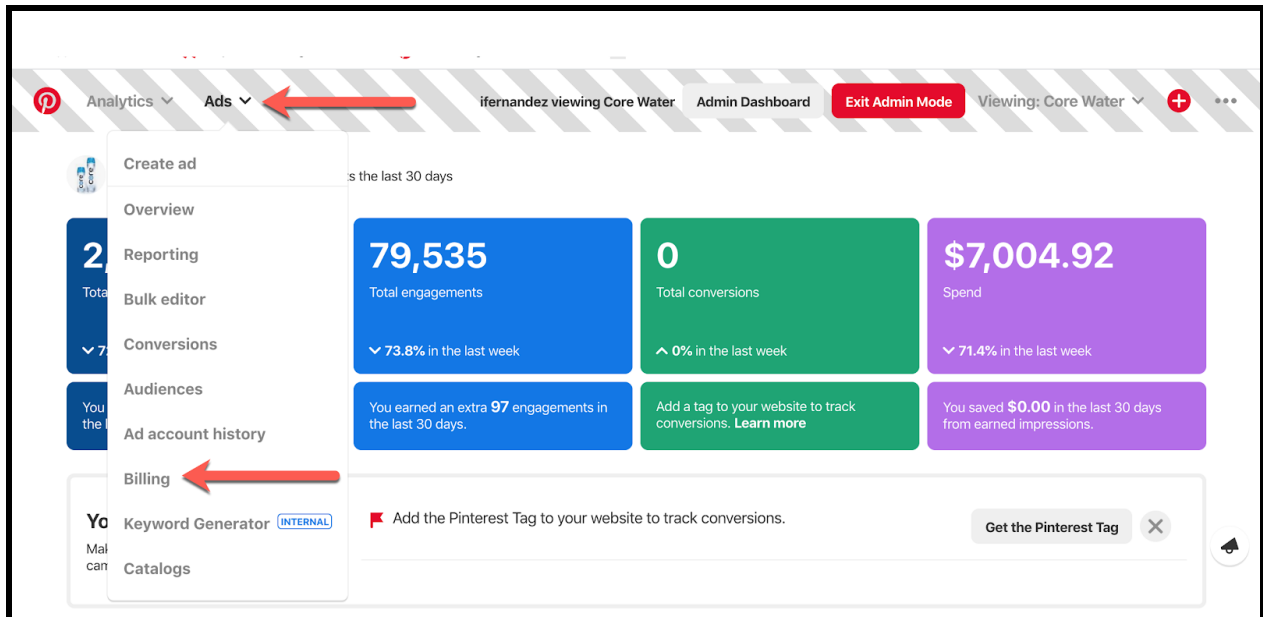
Implementation

For step-by-step details, please reference these videos.

[Order line creation video](#)

[Order line editing video](#)

Once logged in to Pinterest Ads Manager, navigate to the Ads button in the top left of your screen. Select 'Billing' from the drop down options. Navigate to the 'order lines' tab.



Creating an order line in Ads Manager

The screenshot displays the 'Billing' section of the Ads Manager interface. On the left, a sidebar contains links for 'Payment settings', 'Billing history', and 'Order lines' (which is highlighted with a red box). The main area shows the 'Order lines' tab with a table of existing order lines and a modal for adding a new one.

Order lines table:

Roll	Status	Order name	Purchase order	Start date	End date	Budget
✓	Active	UNITED ENTERPRISES, CORP./United730 Toyota Highlander Launch	-	02/05/2020	03/05/2020	\$810,000.00
✓	Active	Auction/Toyota MPV Ad - Indonesia	-	01/03/2020	03/05/2020	\$23,350.00

Annotations:

- Navigation:** An arrow points from the 'Add order line' button to a text box stating: "Navigate to Ads Manager. Under Ads, select Billing. The 'Add order line' button will be available under the Order lines tab."
- Selection:** An arrow points from the 'Add new budget order line' form to a text box stating: "Selection for Bill-to company/addresses are limited to historical records used".
- Agency Link:** An arrow points from the 'Agency link' field in the form to a text box stating: "Insert agency link if clients requires agency paperwork".

Add new budget order line form fields:




- Bill to company: [Dropdown menu]
- Billing address: [Dropdown menu]
- Business address: [Dropdown menu]
- Billing contact: [Form field]
- Billing contact email: [Form field]
- Media contact: [Form field]
- Media contact email: [Form field]
- Start date: [Form field]
- End date: [Form field]
- Budget: [Form field]
- Agency link: [Form field]
- Purchase order: [Form field]
- Order notes: [Form field]
- Advertiser Marketing Partner: [Form field]
- Agree to the terms and conditions: [Form field]

Once an order line has been created, it will be available for immediate consumption and will appear as an option in the order line dropdown on campaign creation.

Editing an order line in Ads Manager

You will notice active order lines indicated by a green dot and expired order lines in red. Only 'Paid' order lines can be edited. Editable OL's will have a pencil icon to the left.

Navigate to the Order Lines tab. OLs eligible to be edited, will display a clickable pencil icon.

Order lines	Status	Order name	Purchase order	Start date	End date	Budget	Line type
	Active	UNIFIED ENTERPRISES, CORP.(Auction)FY20 Toyota Highlander Launch[1]	-	02/03/2020	03/31/2020	\$110,000.00	PAID
	Active	Auction/Toyota Unified - Internal[Test]	-	01/26/2020	03/15/2020	\$20,000.00	TEST
	Active	UNIFIED ENTERPRISES, CORP.(Auction)Unified FCUV FY20 6.3-2.28	-	01/25/2019	03/28/2020	\$138,750.71	PAID

Edit order line

Order name
UNIFIED ENTERPRISES, CORP.(Auction)FY20 Toyota Highlander Launch[1]

Purchase order
Ex. O-16RXB

Start date
02/03/2020

End date
03/31/2020

Budget (in USD)
\$110,000.00

Line type
PAID

Product type
AUCTION

Edit Start Date, End Date, Budget, or PO number via this tool.

Cancel Save

You will notice active order lines indicated by a green dot and expired order lines in red. Editable OL's will have a pencil icon to the left.

A message will appear at the bottom of the page if your edit is successful. Some revisions may take up to 4 hours to be reflected in Ads Manager. The system will prevent you from making subsequent changes if a revision is in process.

If you continue to have difficulties, you may always reach out to your Pinterest sales rep.

FAQs

Q: Who is eligible for SS IO?

A: SS IO eligibility is granted to advertisers that have previously spent on Pinterest. Bill-to and address selections are pre-populated in the dropdown selection from previous IOs.

Q: Can I add new bill-to/address selections?

A: No. If you'd like to submit an IO with information not provided in the dropdown selections, please reach out to your account team.

Q: After submission for order line creation, will I have the full budget available to spend right away?

A: In most scenarios, you will have access to the full budget right away. In some rare scenarios, a cap of \$1,500 will be applied if your account is flagged by our credit approval engine.

Q: Will I be notified after a submission for creation/editing?

A: Yes, an email confirmation will be sent to the billing/media contact you provide in the form.

Q: My agency entered the details, but there's a mistake. How do we update the IO details?

A: Order lines can be edited in-line in the 'Order Line' tab in Ads Manager.

Q: Which users have access to this tool?

A: Only users with access level of 'Admin' and 'Finance' have the ability to create/edit order lines. Users with access level of 'Campaign,' 'Analyst,' 'Audience' are not eligible.

For any additional questions, please reach out to ordermanagement@pinterest.com.