



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.

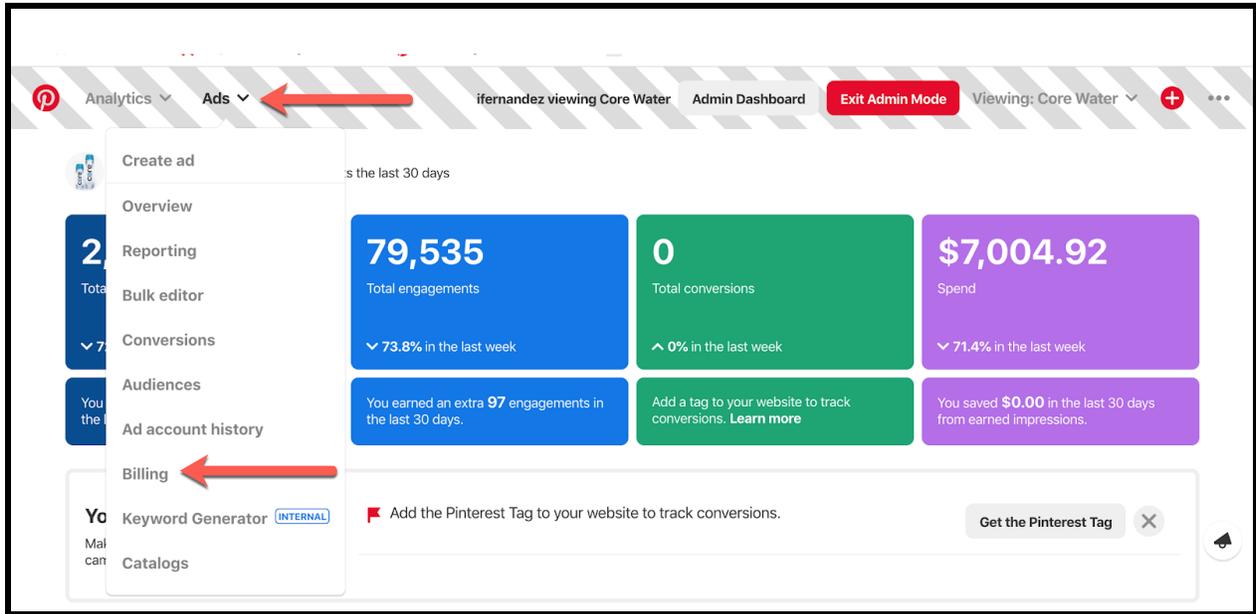
Implementation

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

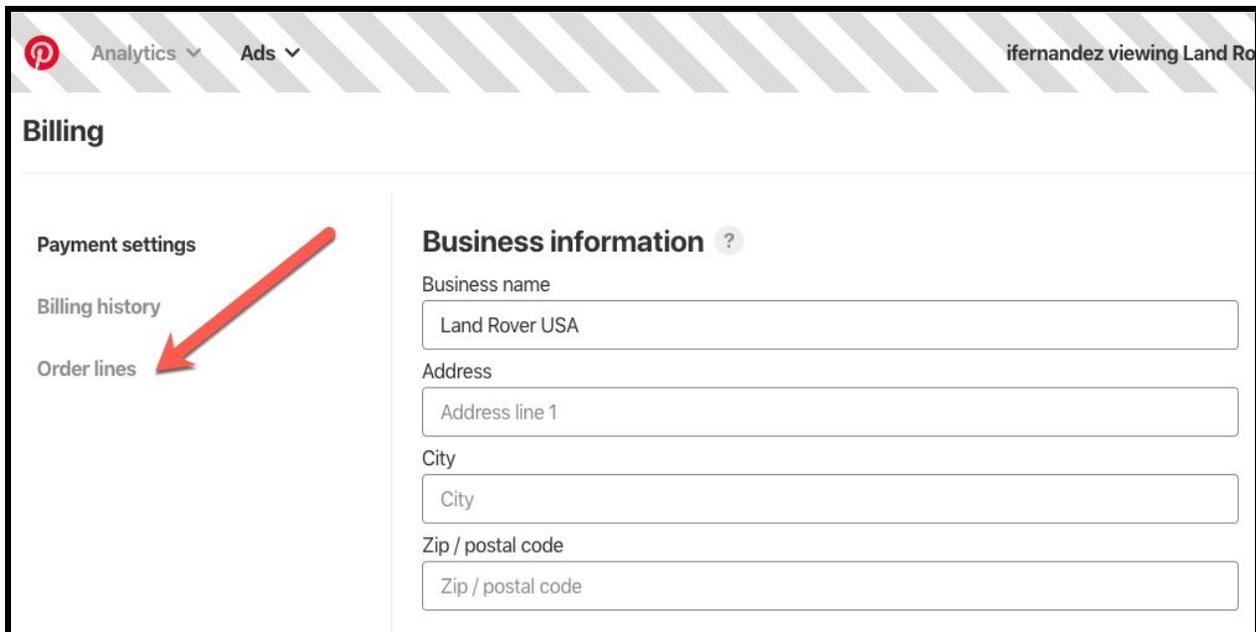
[Order line creation video](#)

[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.



The screenshot shows the Pinterest Ads Manager dashboard. At the top, there is a navigation bar with 'Analytics' and 'Ads' dropdown menus. A red arrow points to the 'Ads' dropdown. Below the navigation bar, there is a sidebar menu with options: 'Create ad', 'Overview', 'Reporting', 'Bulk editor', 'Conversions', 'Audiences', 'Ad account history', 'Billing', 'Keyword Generator', and 'Catalogs'. A red arrow points to the 'Billing' option. The main content area displays performance metrics for the last 30 days: 79,535 Total engagements (73.8% increase), 0 Total conversions (0% increase), and \$7,004.92 Spend (71.4% decrease). There are also three informational cards: 'You earned an extra 97 engagements in the last 30 days', 'Add a tag to your website to track conversions. Learn more', and 'You saved \$0.00 in the last 30 days from earned impressions.' A 'Get the Pinterest Tag' button is visible at the bottom right.



The screenshot shows the 'Billing' page in the Pinterest Ads Manager. The page is divided into two main sections: 'Payment settings' and 'Business information'. A red arrow points to the 'Order lines' link in the 'Payment settings' section. The 'Business information' section contains several input fields: 'Business name' (filled with 'Land Rover USA'), 'Address' (filled with 'Address line 1'), 'City' (filled with 'City'), and 'Zip / postal code' (filled with 'Zip / postal code').

Creating an order line in Ads Manager

The screenshot displays the 'Billing' section of the Ads Manager interface. On the left, a sidebar contains 'Payment settings', 'Billing history', and 'Order lines' (highlighted with a red box). The main area shows the 'Order lines' tab with an 'Add order line' button (highlighted with a red box). Below this is a table of existing order lines:

Roll	Status	Order name	Purchase order	Start date	End date	Budget
	Active	UNIFIED ENTERPRISES, CORP/Advertiser/2020 Seattle BUDGET/Advertiser	-	02/25/2020	03/25/2020	\$810,000.00
	Active	Auction/Traffic/MP Ad - Historical	-	01/01/2020	03/15/2020	\$23,350.00

Below the table is the 'Add new budget order line' form. Red boxes and arrows highlight specific fields: the 'Add order line' button, the 'Add new budget order line' form, and the 'Agency link' field.

Selection for Bill-to company/addresses are limited to historical records used

Insert agency link if clients requires agency paperwork

Navigate to Ads Manager. Under Ads, select Billing. The 'Add order line' button will be available under the Order lines tab.

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.

	Edit	Status	Order name	Purchase order	Start date	End date ↓	Budget	Line ty
		Active	UNIFIED ENTERPRISES, CORP.(Auction FY20 Toyota Highlander Launch)	-	02/03/2020	03/31/2020	\$10,000.00	PAID
		Active	Auction Toyota Utiliad - Internal Test	-	01/26/2020	03/15/2020	\$20,000.00	TEST
		Active	UNIFIED ENTERPRISES, CORP.(Auction Unifed TCUV FY20 6.3-2.28)	-	01/25/2019	02/28/2020	\$198,750.71	PAID

Edit order line

Order name
UNIFIED ENTERPRISES, CORP.(Auction|FY20 Toyota Highlander Launch|)

Purchase order ?
Ex. O-1BRX8

Start date ?
02/03/2020

End date ?
03/31/2020

Budget (in USD) ?
\$10,000.00

Line type
PAID

Product type
AUCTION

Cancel Save

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

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.