



A Datawrkz Product

## Agency User Manual v3.0

Thanks for signing up on Vizibl. This manual gives you details on various features and functionalities of the Vizibl platform and how you can use them.

V2.0 - Updated to include deal selection process to the Insertion Orders from Line Items

V3.0 - Updated to include PG Deal IO, Netflix PG and PMP deals selection in Insertion Order, corresponding changes to create LI flows

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# 1. Agency Advertisers

Each client of your Agency for whom you want to run campaigns on Vizibl has to be created as an Agency Advertiser in Vizibl. All campaign activity happens inside the boundaries of an Agency Advertiser.

## 1.1 Agency Advertisers Listing

Click on Agency Advertisers from the Left Hand Side menu to see a list of Agency Advertisers under your Agency. The Listing screen includes Agency Advertiser Name, Id, State, Number of IOs and LIs associated with the Agency Advertiser, Number of Impressions/Clicks/Average CTR%/Conversions/Average CPM/Total Cost/Total Revenue delivered by all Line Items associated with the Agency Advertiser.

	Name	ID	State	IOs	LIs	Creatives	Imps	Clicks	CTR %	CPM	Conversions	Revenue	Total Cost	⋮
<input type="checkbox"/>	RTP	401025	Active	1	1	1	0	0	0	0.00	0	0.00	0.00	⋮

You can click on the number under the IOs column to go to the Insertion Orders Listing screen, click on the number under the LIs column to go to the Line Items Listing screen, and click on the number under the Creatives column to the Creatives Listing screen.

The screenshot shows the 'Agency Advertisers' section of the Vizibl DSP interface. On the left is a sidebar with 'VDSP' selected under 'Agency Advertisers'. The main area displays a table with one row for 'RTP'. A callout box highlights the column headers: Name, ID, State, IOs, LIs, Creatives, Imps, Clicks, CTR %, CPM, Conversions, Revenue, Total Cost, and three dots for more options. The RTP row shows values: ID 401025, State Active, IOs 1, LIs 1, Creatives 1, Imps 0, Clicks 0, CTR % 0.00, Conversions 0, Revenue 0.00, and Total Cost 0.00.

Name	ID	State	IOs	LIs	Creatives	Imps	Clicks	CTR %	CPM	Conversions	Revenue	Total Cost	⋮
RTP	401025	Active	1	1	1	0	0	0.00	0	0.00	0.00	0.00	⋮

You can modify the columns in the Agency Advertisers Listing by clicking on the three dots menu at the end of column headings and selecting/deselecting respective columns.

This screenshot shows the same 'Agency Advertisers' page as above, but with a context menu open over the RTP row. The menu is titled 'Select Columns' and includes checkboxes for 'Name', 'ID', 'State', and 'Vertical'. Other options like 'Name', 'ID', 'State', and 'Vertical' are also listed but not checked.

You can Edit or Delete an Agency Advertiser by selecting respective options from the three dots menu at the end of each Agency Advertiser.

<input type="checkbox"/>	Name	ID	State	IOs	Lis	Creatives	Imps	Clicks	CTR %	CPM	Conversions	Revenue	Total Cost	⋮
<input type="checkbox"/>	RTP	401025	Active	1	1	1	0	0	0	0.00	0	0.00	0.00	⋮

Items per page: 10    1 – 1 of 1

Edit    Delete

**Warning:** Deleting an Agency Advertiser will remove all data pertaining to that Agency Advertiser from Vizibl and cannot be recovered again.

You can edit an Agency Advertiser directly from the Agency Advertisers Listing screen by clicking an Agency Advertiser.

<input type="checkbox"/>	Name	ID	State	IOs	Lis	Creatives	Imps	Clicks	CTR %	CPM	Conversions	Revenue	Total Cost	⋮
<input type="checkbox"/>	RTP	401025	Active	1	1	1	0	0	0	0.00	0	0.00	0.00	⋮

Items per page: 10    1 – 1 of 1

**Search:** Use the Search button on top right to search for specific Agency Advertisers in the Agency Advertisers Listing. To search for an Agency Advertiser, enter a few letters of the Agency Advertiser Name.

**Filter:** Use the Filter button on top right to filter for specific Agency Advertisers in the Agency Advertisers Listing.

The screenshot shows the 'Agency Advertisers' section of the Vizibl DSP interface. On the left, a sidebar menu includes 'Back to Agencies', 'VDSP', 'Agency Advertisers' (which is selected and highlighted in orange), 'Libraries', 'Reports', 'My Accounts', and 'Users'. The main content area has a header 'AGC: VIZIBL DOCUMENTATION AGENCY > AGENCY ADVERTISERS'. It displays a note about statistical data being in EST5EDT timezone and having a lag of 2-4 hrs. Below this is a table with columns: Name, ID, State, IOs, LIs, Creatives, Imps, Clicks, CTR %, CPM, Conversions, Revenue, and Total Cost. A single row for 'RTP' is shown, with 'Active' status and all other metrics at zero. At the top right are 'Search' and 'Filter' buttons, and a 'CREATE NEW' button. At the bottom right are pagination controls for 'Items per page: 10' and '1 - 1 of 1'.

Following filters are available:

- State: Select Agency Advertiser State
- Time Period for Statistics: Select Date range to see statistics for that Date Range in the Agency Advertisers Listing
- Vertical: Select Agency Advertiser Vertical. Currently defaulted to "General"

Click on **Apply Filter** to apply the selected filters. Click **Clear** at the top to clear the selected filters. Click **Cancel** to close the filters pop-up.

This screenshot shows the same 'Agency Advertisers' page as above, but with a 'Filters' overlay open on the right side. The overlay contains three sections: 'State' (with radio buttons for 'All', 'Active', and 'Inactive', where 'All' is selected), 'Time period for statistics' (with dropdown menus for 'Range' set to 'Yesterday' and 'Vertical' set to 'All'), and 'Buttons' for 'CANCEL' and 'APPLY FILTER'.

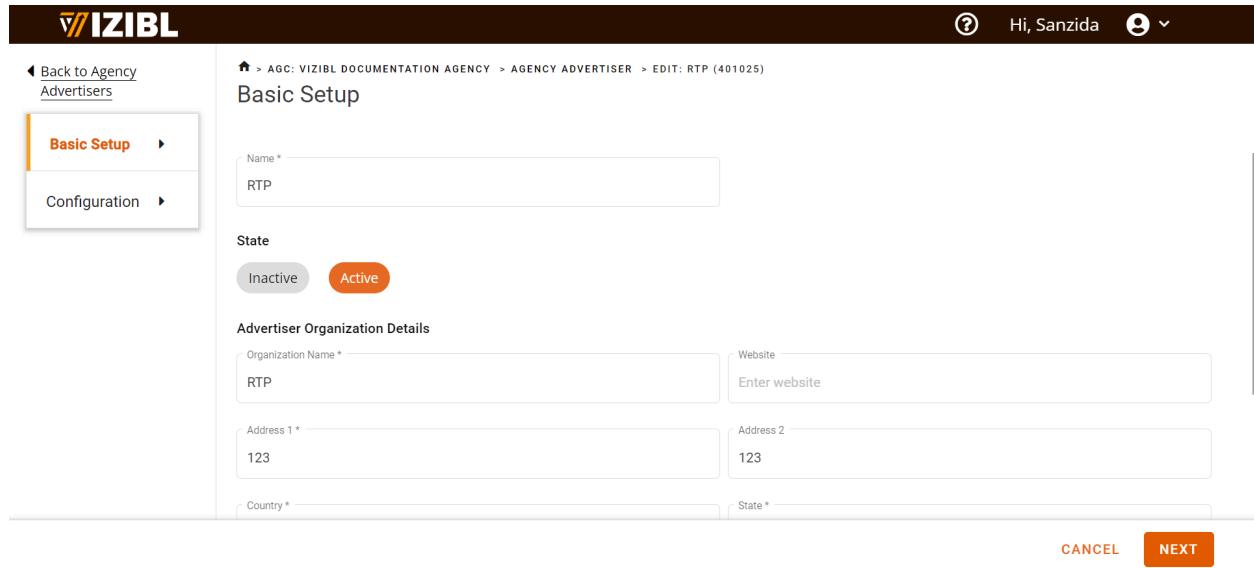
## 1.2 Create an Agency Advertiser

- On the Agency Advertisers Listing screen, click the **+ Create New** button. This opens the Create New Agency Advertiser screen, where you define all relevant details for your advertiser

<input type="checkbox"/>	Name	ID	State	IOs	Lis	Creatives	Imps	Clicks	CTR %	CPM	Conversions	Revenue	Total Cost	⋮
<input type="checkbox"/>	RTP	401025	Active	1	1	1	0	0	0	0.00	0	0.00	0.00	⋮

- Basic set-up:

- Enter a name for the Agency Advertiser. You will later be able to search for and report on the Agency Advertiser using this name
  - In the Vertical dropdown select the industry this Agency Advertiser belongs to. Currently defaulted to General
  - Select a state. If "Active", Insertion Orders and Line Items will be eligible to serve.
- Tip:** To avoid spending before you're ready, set the state to "Inactive" until everything related to the buy has been set up and verified.
- Enter Advertiser Organization Details
  - Click **Next**



Basic Setup

Name \* RTP

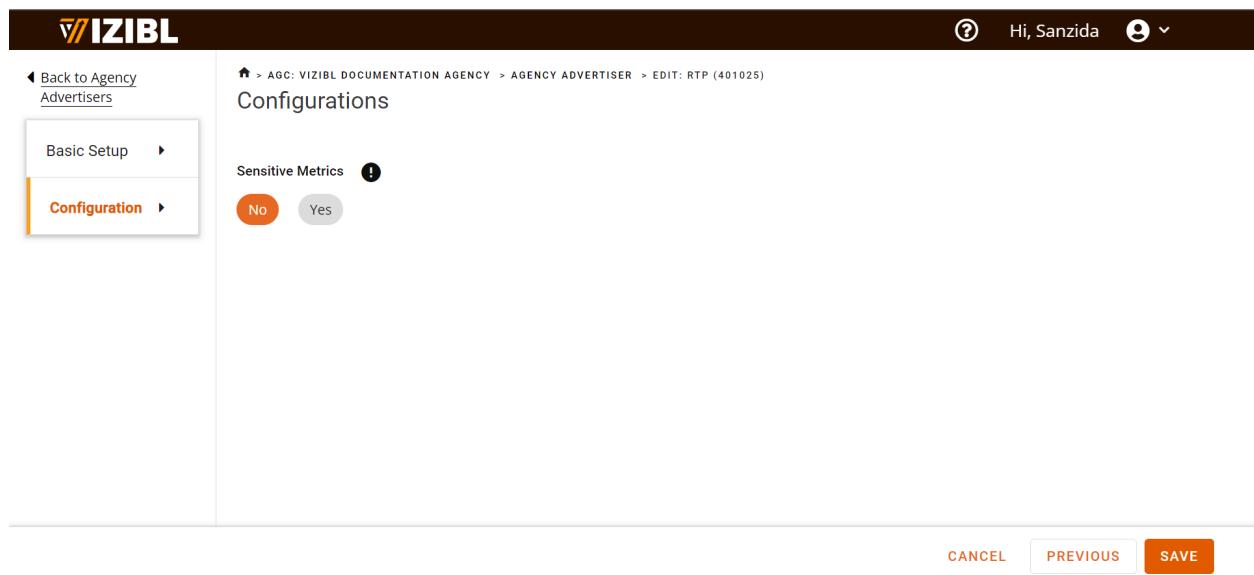
State Active

Advertiser Organization Details

Organization Name *	Website
RTP	Enter website
Address 1 *	Address 2
123	123
Country *	State *

CANCEL PREVIOUS NEXT

3. Configuration: Select Yes to show your Revenue and Profit metrics to your client (if you create and share an Agency Advertiser Reporting user login details to them).
4. Click **Save** to save the Agency Advertiser. Click **Previous** to go to the previous screen or **CANCEL** to cancel the Agency Advertiser Creation



Configurations

Sensitive Metrics !

No Yes

CANCEL PREVIOUS SAVE

## 1.3 Edit an Agency Advertiser

You can edit an Agency Advertiser details from the Agency Advertisers Listing screen by clicking on the three dots menu at the end of each Agency Advertiser row and clicking Edit edit the following fields:

- Agency Advertiser Name
- Agency Advertiser State from Active to Inactive or vice versa
- Agency Advertiser Organization Details
- Configuration options

Name	ID	State	IOs	LIs	Creatives	Imps	Clicks	CTR %	CPM	Conversions	Revenue	Total Cost
RTP	401025	Active	1	1	1	0	0	0.00	0	0.00	0.00	0.00

## 2. Insertion Orders

Insertion orders allow you to easily manage collections of line items that may share a common budget, time span, and business terms. An insertion order can contain one or more line items. For example, you may want to set a common budget and billing periods for several line items, but have each line item target a different region or buy different types of media.

Associating your line items with insertion orders allows you to preserve historical pacing and performance data across line items under a single insertion order, and to streamline your setup for long-standing advertiser relationships.

### 2.1 Insertion Orders Listing

Click on Insertion Orders from the Left Hand Side menu to see a list of Insertion Orders under an Advertiser. The Listing screen includes Insertion Order Name, Id, State, Deal Type, Number of LIs associated with the Insertion Order, Number of Impressions/Clicks//Average CTR%/Conversions/Average CPM/Total Cost/Total Revenue delivered by all Line Items associated with the Insertion Order, and Last Modified Date of the Insertion Order.

Name	ID	State	Deal Type	LIs	Imps	Clicks	Convs	CTR %	CPM	Total Cost	Rev	Last Modified
CTV_Test_Vizibl	100001030	Active	Regular	1	0	0	0	0%	0	0.00	0.00	Nov 8, 2022

You can click on the number under the LIs column to go to the **Line Items Listing** screen.

Name	ID	State	Deal Type	LIs	Imps	Clicks	Convs	CTR %	CPM	Total Cost	Rev	Last Modified
CTV_Test_Vizibl	100001030	Active	Regular	1	0	0	0	0%	0	0.00	0.00	Nov 8, 2022

You can modify the columns in the **Insertion Orders Listing** by clicking on the three dots menu at the end of column headings and selecting/deselecting respective columns.

Name	ID	State	Deal Type	LIs	Imps	Clicks	Convs	CTR %	CPM	Total Cost	Rev	Last Modified
CTV_Test_Vizibl	100001030	Active	Regular	1	0	0	0	0%	0	0.00		

You can Edit or Activate or Delete an Insertion Order by selecting respective options from the three dots menu at the end of each Insertion Order.

The screenshot shows the 'Insertion Orders' listing page. On the left, there's a sidebar with 'Campaigns' expanded, showing 'Insertion Orders' selected. The main area has a header 'Insertion Orders' and a note about statistical data. A table lists one insertion order:

Name	ID	State	Deal Type	Lts	Imps	Clicks	Convs	CTR %	CPM	Total Cost	Rev	Last Modified	More
CTV_Test_Vizibl	100001030	Active	Regular	1	0	0	0	0%	0	0.00	0.00	Nov 8, 2022	More

At the bottom right, there are buttons for 'Edit', 'Deactivate', and 'Delete'.

You can edit an insertion order directly from the **Insertion Orders Listing** screen by clicking an Insertion Order.

You can activate/Deactivate an Insertion Order from the **Insertion Orders Listing** screen by selecting the Check box next to each insertion order that you want to activate or deactivate and clicking the Activate or Deactivate button at the top right of the screen.

The screenshot shows the same 'Insertion Orders' listing page as before, but with a checked checkbox next to the 'Name' column for the row 'CTV\_Test\_Vizibl'. At the top right, there are two buttons: 'DEACTIVATE' and 'ACTIVATE'. The 'ACTIVATE' button is highlighted in orange.

**Search:** Use the Search button on top right to search for specific Insertion Orders in the **Insertion Orders Listing**. To search for an Insertion Order, enter a few letters of the Insertion Order Name.

**Filter:** Use the Filter button on top right to filter for specific Insertion Orders in the Insertion Orders Listing.

Name	ID	State	Deal Type	Lis	Imps	Clicks	Conv	CTR %	CPM	Total Cost	Rev	Last Modified	More Options
CTV_Test_Vizibl	100001030	Active	Regular	1	0	0	0	0%	0	0.00	0.00	Nov 8, 2022	⋮

Following filters are available:

- **State:** Select Insertion Order State
- **Time Period for Statistics:** Select Date range to see statistics for that Date Range in the Insertion Orders Listing
- **Deal Type:** Select Deal Type from the available list
- **Campaign Date:** Select From-Date and To-Date to see Insertion Orders that have flight dates within those From-Date and To-Date

Click on **Apply Filter** to apply the selected filters. Click **Clear** at the top to clear the selected filters. Click **Cancel** to close the filters pop-up.

**Insertion Orders**

Please note that the statistical data shown below is in EST5EDT timezone and has a lag of 2-4 hrs.  
All cost and revenue figures in the below grid are in USD.

Name	ID	State	Deal Type	Lis	Imps	Clicks	Convs
CTV_Test_Vizibl	100001030	Active	Regular	1	0	0	0

**Filters** **CLEAR**

**State**

- All
- Active
- Inactive

**Time period for statistics**

Range Yesterday

**Deal Type**

Types All

## 2.2 Create a New Insertion Order

1. Click the Create New button from the **Insertion Orders Listing** screen

**Insertion Orders**

Please note that the statistical data shown below is in EST5EDT timezone and has a lag of 2-4 hrs.  
All cost and revenue figures in the below grid are in USD.

Name	ID	State	Deal Type	Lis	Imps	Clicks	Convs	CTR %	CPM	Total Cost	Rev	Last Modified	⋮
CTV_Test_Vizibl	100001030	Active	Regular	1	0	0	0	0%	0	0.00	0.00	Nov 8, 2022	⋮

**CREATE NEW**

2. Basic SetUp: In the Basic Setup section, you enter basic information about the insertion order, such as its name and its budget and billing details:
  1. Enter a name for the insertion order. You will later be able to search for and report on the Insertion Order using this name

2. Select a state. If "Active", child Line Items will be eligible to serve.  
**Tip:** To avoid spending before you're ready, set the state to "Inactive" until everything related to the buy has been set up and verified.
3. Select OpenRTB if you want to target auction based inventory. If you want to use deals in the LIs corresponding to this IO, Select one of the Deal type (listed below)
  - i. Netflix PG: Select this option if you want to target Netflix PG deals. This option is available only if it is enabled for your account. Please write to [accountssupport@datawrkz.com](mailto:accountssupport@datawrkz.com) or your account manager to enable this feature for your account
  - ii. PG Deals: Select this option if you want to target Programmatic Guaranteed Deals
  - iii. PMP Deals: Select this option if you want to target Private MarketPlace or Private Auction Deals. Also Select Yes for Private Deals if you have publisher negotiated deals to use in this Insertion Order. Else select No.
  - iv. PMP Netflix: Select this option if you want to target Netflix PMP deals. This option is available only if it is enabled for your account. Please write to [accountssupport@datawrkz.com](mailto:accountssupport@datawrkz.com) or your account manager to enable this feature for your account

**Warning:** You cannot change the Deal Type once you save the insertion order. Also, if you select a Deal Type in the IO, corresponding LIs under this IO can only target deals. You cannot mix and match Deal LIs and Non-deal LIs

Below sections detail the steps involved in creating different IO types based on the Deal Type option selected above.

### 2.2.1 For Open RTB IOs

- i. Select a budget type. Determines whether the budget will be allocated by revenue (money) or by impression.
  1. Revenue - If this Insertion Order runs on money as budget cap
  2. Impressions - If this Insertion Order runs on impressions as budget cap

**Warning:** You cannot change the Budget Type once you save the insertion order.

- ii. Set up billing periods and budgets. You can add multiple billing periods and budgets. Billing periods allow you to allocate portions of your marketing budget to discrete periods of time. Any Line Item flight dates must occur within the dates of the parent insertion order's billing periods.

**Warning:** You cannot set a start date in the past.

- iii. Select a Frequency cap. This Frequency cap can be further refined or set at Line Items level as well. Most restrictive frequency takes precedence

The screenshot shows the 'Basic Setup' step of the insertion order creation process. It includes fields for the insertion order name, state (Active), ID type (PMP Deal), private deals (No), budget type (Revenue), start date (05-Aug-2024), end date (dd-mm-yyyy), budget amount (USD), and frequency (6 times per day).

- iv. Select an inventory Allow/Block list. This determines the inventory that may be targeted or blocked by any line items belonging to this insertion order. This is optional and can be applied at individual Line Item level as well. A Vizibl blocklist is applied by default.
- v. Click Save to save the insertion order.

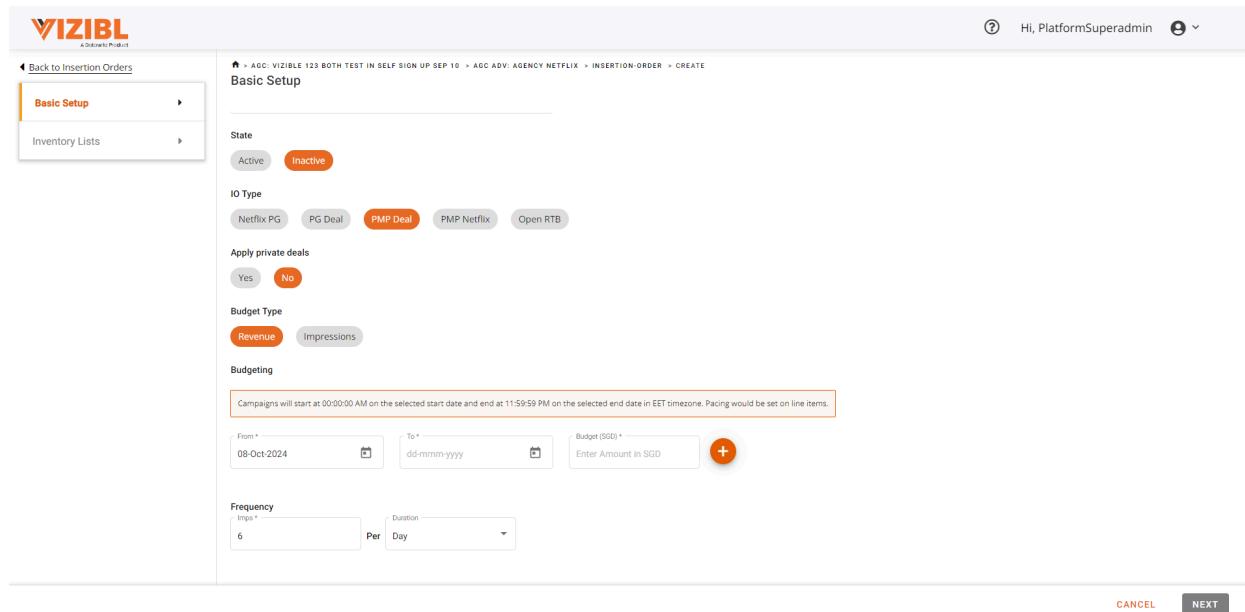
## 2.2.2 For PMP Deal or Netflix PMP Deal IOs

- i. Apply Private Deals: Select “Yes” if you want to target deals that you have negotiated with publishers. Contact [accountssupport@datawrkz.com](mailto:accountssupport@datawrkz.com) to approve and enable these deals for your account. Select “No” if you want to target deals already available in the platform
- ii. Select a budget type. Determines whether the budget will be allocated by revenue (money) or by impression.
  1. Revenue - If this Insertion Order runs on money as budget cap
  2. Impressions - If this Insertion Order runs on impressions as budget cap

**Warning:** You cannot change the Budget Type once you save the insertion order.
- iii. Set up billing periods and budgets. You can add multiple billing periods and budgets. Billing periods allow you to allocate portions of your marketing budget to discrete periods of time. Any Line Item flight dates must occur within the dates of the parent insertion order's billing periods.

**Warning:** You cannot set a start date in the past.

- iv. Select a Frequency cap. This Frequency cap can be further refined or set at Line Items level as well. Most restrictive frequency takes precedence



Basic Setup

State: Active

IO Type: PMP Deal

Apply private deals: Yes

Budget Type: Revenue

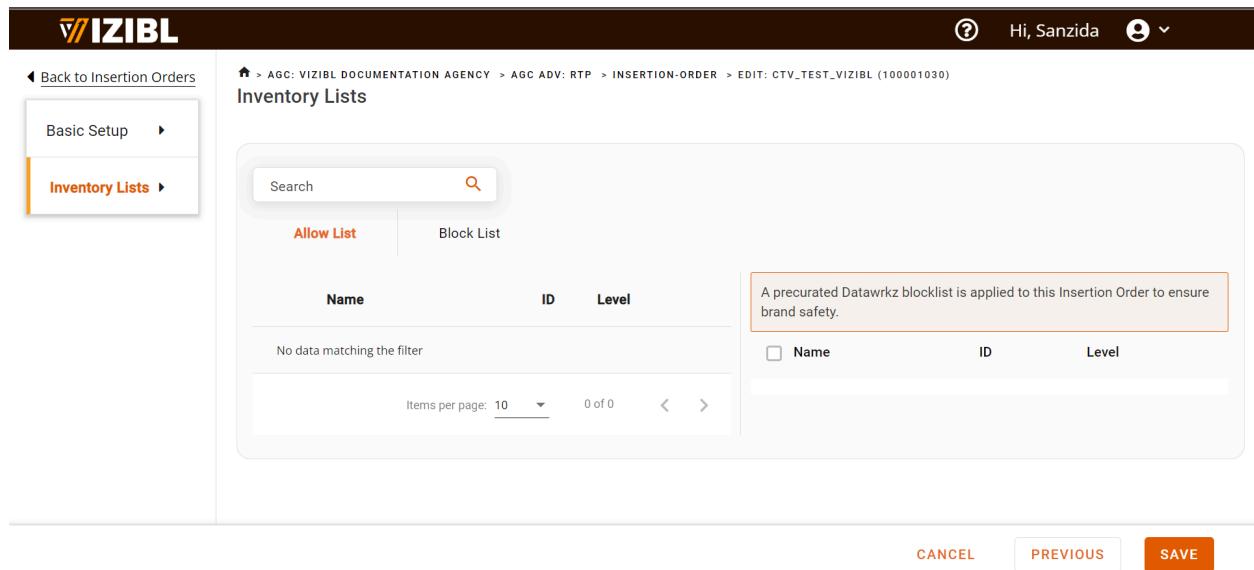
Campaigns will start at 00:00:00 AM on the selected start date and end at 11:59:59 PM on the selected end date in EET timezone. Pacing would be set on line items.

From: 08-Oct-2024      To: dd-mmm-yyyy      Budget (SGD): Enter Amount in SGD

Frequency: Imps \* 6 Per Day

**NEXT**

- v. Select an inventory Allow/Block list. This determines the inventory that may be targeted or blocked by any line items belonging to this insertion order. This is optional and can be applied at individual Line Item level as well. A Vizibl blocklist is applied by default.
- vi. Click Save to save the insertion order.



Inventory Lists

Allow List

No data matching the filter

Block List

A precurated Datawrkz blocklist is applied to this Insertion Order to ensure brand safety.

**SAVE**

### 2.2.3 For PG Deals or Netflix PG Deals

- i. Apply Private Deals: Select “Yes” if you want to target deals that you have negotiated with publishers. Contact [accountssupport@datawrkz.com](mailto:accountssupport@datawrkz.com) to approve and enable these deals for your account. Select “No” if you want to target deals already available in the platform
- ii. Set up billing periods You can add only a single billing period to target PG deals. To avoid delivery issues, please align the billing periods with those of the deals negotiated with the publisher. Any Line Item flight dates must occur within the dates of the parent insertion order's billing periods.

**Warning:** You cannot set a start date in the past.

- iii. No other IO options are available for PG deals; these are controlled by the publisher in the deal set up.
- iv. Click Save to save the insertion order.

The screenshot shows the 'Basic Setup' section of the Vizibl DSP interface. The 'Name' field is empty. The 'State' dropdown has 'Active' selected. The 'IO Type' dropdown has 'PG Deal' selected. The 'Apply private deals' dropdown has 'No' selected. A note below says 'Please align the dates to Programmatic Guaranteed deal dates to avoid inconsistencies in delivery.' Date pickers for 'From' (08-Oct-2024) and 'To' (dd-mmm-yyyy) are shown. At the bottom are 'CANCEL' and 'SAVE' buttons.

### 2.3 Edit an Insertion Order

You can edit an insertion order directly from the **Insertion Orders** screen by clicking on an Insertion Order and Edit the following fields:

- Insertion Order Name
- Insertion State from Active to Inactive or vice versa

- Billing periods and budgets of any flights with future start/end dates as applicable for each Deal Type
- Add new flights
- Frequency cap
- Add/Remove Inventory Lists

You cannot edit the following fields:

- Deal Type
- Budget Type
- Apply Private Deals Yes/No
- Billing periods and budgets of any flights with past Start and end dates

## 3. Line Items

You use Line items (LIs) to set up targeting for an advertising campaign, and schedule your advertisements to run.

### 3.1 Line Items Listing

Click on Line Items from the Left Hand Side menu to see a list of Line Items under an Advertiser. The Listing screen includes Line Item Name, Id, State, Ad Type, Insertion Order Id, Number of Creatives associated with the Line Item, Number of Impressions/Clicks//Average CTR%/Conversions/Average CPM/Total Cost/Total Revenue delivered by all Line Items associated with the Line Item, and Last Modified Date of the Line Item.

Name	ID	State	Ad Type	Insertion Order ID	Creatives	Imps	Clicks	Conv	CTR %	CPM	Rev	Total Cost	Last Modified
CTV_Test_Vizibl_LI	200001100	Inactive	Connected TV	100001030	1	0	0	0	0%	0	0.00	0.00	Sep 11, 2023

You can click on the Insertion Id to go to the Insertion Order details screen.

You can click on the number under the Creatives column to go to the Creatives Listing Screen showing all Creatives associated with that Line Item.

Name	ID	State	Ad Type	Insertion Order ID	Creatives	Imps	Clicks	Convs	CTR %	CPM	Rev	Total Cost	Last Modified
CTV_Test_Vizibl_LI	200001100	Inactive	Connected TV	100001030	1	0	0	0	0%	0	0.00	0.00	Sep 11, 2023

You can modify the columns in the Line Items Listing by clicking on the three dots menu at the end of column headings and selecting/deselecting respective columns.

Name	ID	State	Ad Type	Insertion Order ID	Creatives	Imps	Clicks	Convs	CTR %	CPM	Rev	Total Cost	Last Modified
CTV_Test_Vizibl_LI	200001100	Inactive	Connected TV	100001030	1	0	0	0	0%	0	0.00	0.00	

You can Create a new Line Item by clicking on **+Create New** button.

Name	ID	State	Ad Type	Insertion Order ID	Creatives	Imps	Clicks	Convs	CTR %	CPM	Rev	Total Cost	Last Modified
CTV_Test_Vizibl_LI	200001100	Inactive	Connected TV	100001030	1	0	0	0	0%	0	0.00	0.00	Sep 11, 2023

You can Edit or Duplicate or Delete a Line Item by selecting respective options from the three dots menu at the end of each Line Item.

You can edit a Line Item directly from the Line Items Listing screen by clicking an Line Item.

You can activate/Deactivate a Line Item from the Line Items Listing screen by selecting the Check box next to each Line Item that you want to activate or deactivate and clicking the Activate or Deactivate button at the top right of the screen.