



User Guide

Everything you need to connect ad accounts, pace client budgets, and stop overspend before it happens.

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01 Welcome to PaceWise

AI-powered pacing watches every client's spend against budget across Google, Meta, Microsoft, and TikTok Ads — flags overspend days before it lands, and turns monthly reporting into a one-minute job.

PaceWise is a budget-pacing platform built for agencies running paid media across Google Ads, Meta Ads, Microsoft Advertising, and TikTok Ads. It watches every client's spend against their budget in real time, tells you when a campaign is drifting off pace, and lets you pause campaigns or adjust budgets directly from PaceWise — without logging into four different ad platforms.

This guide walks through every part of the app, in the order you'll typically use them: connecting your accounts, reading your dashboard, making changes, and setting up the automations that do the watching for you.

What PaceWise does for you:

- **Pacing monitored — and managed** — see instantly whether each campaign is on pace, under-pacing, or overspending, and let PaceWise actively manage it back on track, not just report it.
- **Real writes, not just reporting** — pause, resume, and edit budgets on the actual ad platform from inside PaceWise.
- **Automated protection** — optional auto-pause and auto-pacing keep campaigns in line even when nobody's watching.
- **Client-ready reporting** — white-label PDF reports, available instantly, that you can send straight to clients.

02 Getting Started

When you first sign up, PaceWise walks you through a six-step onboarding wizard. You can always change any of these settings later from Connect or Settings — nothing here is permanent.

- **1. Create your account** — your name, email, and agency name.
- **2. Choose a plan** — PaceWise's plans are based on your trailing 30-day ad spend under management, not client count. Clients and team members are unlimited on every paid tier.
- **3. Connect ad platforms** — authorize PaceWise to read and write to your Google, Meta, Microsoft, and/or TikTok accounts (see Section 03).
- **4. Import campaigns** — pick which campaigns from each connected account you actually want PaceWise tracking.
- **5. Set budget & rollover** — tell PaceWise each client's budget cycle and whether unused budget rolls over to the next period.
- **6. Set up alerts** — choose your default overspend/under-pace threshold and how you want to be notified.

03 Connecting Your Ad Accounts

Go to **Connect** in the nav rail to manage every ad-platform connection for your agency. Click “Connect” next to a platform to start the real OAuth flow — you’ll be sent to Google, Meta, Microsoft, or TikTok to sign in and approve access, then brought back to PaceWise to pick which of your ad accounts to link.

Each connection is agency-wide, not per-client — once an ad account is connected, you assign its campaigns to individual clients as you import them.

On the Connect page you can also:

- Reassign or disconnect an existing connection (disconnecting is a confirm-before-you-commit action, since it stops tracking every campaign under that account).
- For TikTok accounts, choose which conversion channel (App, Shop, or Website) PaceWise should treat as “revenue” for that account — TikTok doesn’t let PaceWise guess this automatically.

Your agency’s name, logo, default alert threshold, and Slack/Teams webhooks live separately, under **Settings** — see Section 08 for the logo.

04 Your Dashboard

The Dashboard is where you'll spend most of your time. Switch between clients using the client switcher in the top bar, and between platforms using the tabs (Combined, Google, Meta, Microsoft, TikTok).

What you'll see:

- **KPI cards** — Spent, Budget, and Projected spend for the current budget cycle, at a glance.
- **Budget pacing bar** — a visual read on whether the client is tracking on-pace, under-pacing, or overspending relative to where they should be in the cycle.
- **Campaign budgets table** — every tracked campaign with its own spend, budget, and pace, computed from real day-by-day data (not a straight-line estimate).
- **Smart Recommendations & Anomalies** — a panel flagging spend spikes, budgets close to their daily cap, and stalled conversions (see Section 09).
- **Change History** — a running log of everything changed on this client, by whom (see Section 07).

05 Making Changes from PaceWise

PaceWise lets you act on what you see, directly from the dashboard — every one of these is a real write to the ad platform, not just a change inside PaceWise's own database.

- **Pause / resume a campaign** — one click from the campaign row.
- **Edit a daily budget** — change the number, PaceWise pushes it live.
- **Start tracking a campaign** — add a campaign that isn't yet being monitored.
- **Stop tracking a campaign** — remove it from PaceWise without touching it on the ad platform.
- **Edit a client's budget cycle** — change the total budget, cycle type, reset day, or rollover setting.

Every one of these shows an amber confirmation warning before it runs, and calls the real ad-platform API first — if that call fails for any reason, nothing changes in PaceWise either, so what you see here never drifts from what's actually happening on the platform. The reverse is also true: if a campaign gets paused or resumed directly on the ad platform (outside PaceWise), that change is picked up automatically the next time metrics sync.

06 Portfolio View

Portfolio gives you a bird's-eye view across every client at once — a grid of cards you can search, sort, and filter by pacing status, so an off-pace client never gets lost among dozens of on-pace ones.

Click any card to switch your active client and jump straight to their dashboard. You can also add a new client from here via the inline Add Client modal (subject to your plan's client limit, if any).

07 Change History

Every write PaceWise makes — whether you triggered it manually or an automation like Auto-Pause did — is logged to that client's Change History on the dashboard: what changed, the old and new value, who made it (or “System” for automated changes), and when. It's the first place to look if a client asks “why did this campaign's budget change?”

08 Client Reports

Reports generates white-label PDF reports for clients — Weekly, Fortnightly, or Monthly, for either the current period or the last completed one. A live preview shows exactly what the downloaded PDF will look like before you send it.

By design, client reports only ever show Spent, Budget, Conversions, and CPA — no pacing or projection language, since that's internal, agency-facing detail your clients don't need to see.

Above those numbers, every report includes a short written Summary — grounded entirely in that client's real data, never generic filler. It always states the headline spend and CPA trend, then adds whichever of these are genuinely notable this period: the campaign driving the majority of conversions at the lowest CPA in the account, a campaign whose CPA is climbing and worth a closer look, the campaign whose CPA improved the most, and how ROAS compares to last period. A quiet period just gets the headline numbers — nothing is invented to fill space.

Reports also go out in your client's own language — pick from 8 languages (English, Spanish, French, German, Portuguese, Italian, Dutch, Polish) per client from Client settings or the Reports page. Metric names like ROAS and CPA stay in English in every language, since those are terms your clients and team already recognize.

Add your agency's logo from Settings to have it appear on the dashboard header and every client report — that's what makes these reports genuinely white-label.

09 Smart Recommendations & Anomalies

PaceWise continuously checks every tracked campaign for three things: a sudden spend spike, a daily budget cap being saturated, and conversions stalling out. When it finds one, it shows up as an Anomaly on the dashboard with Investigate, Dismiss, or Pause-campaign actions.

Separately, Recommendations suggest shifting budget between campaigns in the same channel based on their relative ROAS — click Apply to make the shift for real, or Dismiss to ignore it. Both panels are filtered by whichever platform tab you're currently viewing.

10 Alerts

Set an alert threshold (as a percentage over or under pace) per client during onboarding or from Connect, and PaceWise checks every client against it on a schedule. When a client crosses the threshold, an AlertEvent is raised and you're notified — by email, Slack, or Microsoft Teams, depending on what you've configured.

The bell icon in the top bar always reflects real, ongoing alert evaluation — if it's lit up, something genuinely needs your attention right now.

11 Automated Overspend Protection

Two optional, per-client automations do the watching for you so nothing depends on someone checking the dashboard in time.

- **Auto-Pause** — the instant a client's cycle-to-date spend hits 100% of their budget, every active tracked campaign for that client is paused automatically. It fires once per budget cycle, so if you manually resume a campaign, it's respected for the rest of that cycle rather than immediately re-paused.
- **Auto Pacing** — nudges each active campaign's daily budget once a day toward the client's ideal pace, staying within a configured $\pm\%$ range around that campaign's base daily budget.

Both are off by default — turn them on per client from the client's settings, and both write through the exact same real ad-platform calls as a manual dashboard change, logged to Change History with “System” as the actor.

12 Team & Roles

Invite teammates from Team — enter their email and role, and they'll get a real invite email with a link to set their password and get started.

Four roles, each with different access:

- **Owner / Admin** — full access, including agency-wide Connect settings and Billing.
- **Manager** — can make write changes, but only for clients they've been assigned to.
- **Viewer** — read-only, scoped to their assigned clients; write controls are hidden entirely on their dashboard.

Assign which clients a Manager or Viewer can see from their row in the Team list — useful once you have more clients than any one person should be touching.

13 Billing

PaceWise's plans are priced by trailing 30-day ad spend under management, not by how many clients or team members you have — both are unlimited on every paid tier, with one shared cap of 100 connected ad accounts across the whole agency.

Your current-plan card shows ad-account usage and a nudge to upgrade once your spend outgrows your current tier. Upgrades happen immediately through Stripe Checkout; downgrades are scheduled to take effect at your next billing cycle rather than instantly. If your agency manages \$10M+/month, that tier is quote-only — use the Contact Us link on the Billing page.

14 Getting Help

Click the chat icon in the nav rail any time to open the support drawer — it's a real AI assistant that knows PaceWise, with your past conversation history saved and a few suggested questions to get you started.

For anything the assistant can't resolve, or for account and billing questions, reach the PaceWise team directly at support@pacewise.app.