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# Part 1

## Introduction to SAS 360 Match

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<th>About SAS 360 Match</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chapter 2</td>
<td>Navigating the User Interface</td>
<td>5</td>
</tr>
</tbody>
</table>
About SAS 360 Match

What Is SAS 360 Match?

SAS 360 Match is an online publishing solution that gives you control of the online advertising process and enables you to deliver advertising content that is more relevant to your customers. The product supports content on multiple platforms, including mobile and video output devices.

In addition, SAS 360 Match provides sales order management, simulation-based forecasting, ad serving, and business intelligence capabilities to help you make better-informed decisions faster across the entire business. You can use SAS 360 Match to manage sales orders, simulate and forecast inventory levels, optimize pricing and target ad delivery, provide billing and invoicing reports, and visualize and analyze ad delivery details.

Publishers and broadcasters can use SAS 360 Match to connect online content providers who sell ad space on their digital properties to advertisers who are interested in their website’s visitors.

Brands such as banks, retailers, or direct marketers can use SAS 360 Match to personalize their websites or mobile applications with customized spots that show one customer a featured item that might not be of interest to another. They can also sell these spots to third parties, by allowing products or services of other organizations to purchase the right to promote their goods or services on the brand’s websites or applications.

SAS 360 Match maintains the privacy and identity of your users. For more information, see the SAS 360 Match Privacy Statement.
Navigating the User Interface

Log In to SAS 360 Match

1 In the address bar of your web browser, enter the URL for SAS 360 Match (for example, http://shrtnme.aimatch.com where shrtnme is the name of your company) and press Enter. The Login page appears.

Note: Contact your system administrator if you need the URL for SAS 360 Match.

2 Enter a Login ID and Password.

3 Click Login. The Home screen appears.
Understanding the User Interface

After you log on, the Home page for SAS 360 Match appears. The tabs at the top of the page are the main navigational links that appear on every page. You might have a Quick Start panel to the far right containing a Quick Start tutorial, a link to the Knowledge Base, and a Processing Status section. Any field that requires input is denoted by an asterisk. All other fields are optional.

Home Tab

The Home tab appears by default when you log on to SAS 360 Match. The following table lists and describes the tabs on the Home tab:

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation</td>
<td>Displays links to all the tabs in the application.</td>
</tr>
<tr>
<td>Knowledge Base</td>
<td>Provides access to the Knowledge Base. You can click Open knowledge base in a separate window to open the Knowledge Base in a separate window.</td>
</tr>
<tr>
<td>API Docs</td>
<td>Provides links to information about the XML REST API documentation for SAS 360 Match.</td>
</tr>
</tbody>
</table>

My Work Tab

You use the My Work tab to display your associated alerts and ongoing and completed tasks. Alerts can be created for price, inventory, change order, or credit rules. For more information, see Chapter 35, “Setting Alerts,” on page 195.

From the My Work tab, you can filter to view particular alerts, view only your alerts, or view all team alerts. Select the check boxes beside multiple alerts and click the Multi Edit button to update or clear the selected alerts. You can also click ❌ at the end of the row of an alert to clear an alert. You can either request approval for the proposal or line item change if you are the requester, or approve (or reject) the request if you are the approver. The approver is specified on the Alert Settings subtab under the Sales tab. Once approval is requested or approved, the button is no longer displayed. Alternatively, the alert can be cleared by clicking the Just clear button.
it button. Notes that are saved with the alert can be added whether approval is requested or it is cleared.

Tasks can be viewed in the **Tasks** tab of the My Work section. Click **View My Background Tasks** to view the tasks that are being processed in the background.

**Dashboard Tab**

The **Dashboard** tab displays performance charts and graphs that are automatically generated for each client. The following table lists and describes the tabs on the **Dashboard** tab:

*Table 2.2 Overview of the Dashboard Tab*

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flight Summary</td>
<td>Displays an at-a-glance analysis of flight progress.</td>
</tr>
<tr>
<td>Top 20 Products</td>
<td>Displays the top 20 products with the most inventory available, along with the product sales history.</td>
</tr>
<tr>
<td>Sell Through</td>
<td>Illustrates and compares trends in revenue, impressions, customers, and daily effective Cost Per Thousand (eCPM) rate for all flights of a selected flight type.</td>
</tr>
<tr>
<td>Product Overlap</td>
<td>Displays the top products with revenue at risk based on the opportunity cost (sales rate booked versus floor rate specified for the product). The dashboard enables you to select one of those products and drill down to view products that are overlapping and consuming inventory based on flights that serve to the same inventory.</td>
</tr>
</tbody>
</table>

**Traffic Tab**

The **Traffic** tab contains all trafficking-related functions. The **Campaigns** tab is selected by default when the **Traffic** tab is selected. The following table lists and describes the tabs on the **Traffic** tab:
<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaigns</td>
<td>Displays all the campaigns that are loaded in the system, including the inactive ones. Campaigns contain flights. The list can be filtered by Name, Status, and Advertiser. For more information, see Chapter 3, “Managing Campaigns,” on page 19.</td>
</tr>
<tr>
<td>Flights</td>
<td>Displays all the flights that are loaded in the system. The list can be filtered by expanding the Filtering panel. Closed flights are not displayed by default, but can be displayed by selecting the Closed status as a filter. Flights contain delivery goals, options, and creatives. On this tab, you can edit, copy, view, and research flights. You can also view targeting for a flight. You can create flights only in a campaign. For more information, see Chapter 4, “Managing Flights,” on page 39.</td>
</tr>
<tr>
<td>Tiers</td>
<td>Lists all tiers, both active and inactive, that are set up in the system. Tiers organize the ad queue into a hierarchy, enabling you to control which flights are more important and therefore are evaluated more often. For more information, see Chapter 5, “Managing Tiers,” on page 45.</td>
</tr>
<tr>
<td>Custom Actions</td>
<td>Lists all custom actions that are set up in the system. Custom actions are typically visitor-triggered event markers. For more information, see Chapter 6, “Managing Custom Actions,” on page 57.</td>
</tr>
<tr>
<td>Debug Ad Request</td>
<td>Makes an ad call to the engine and receives debugging information. For more information, see Chapter 7, “Debugging Ads,” on page 59.</td>
</tr>
<tr>
<td>Labels</td>
<td>Adds custom fields and values to a flight. These custom fields are available through the API and BI reporting. For more information, see Chapter 8, “Managing Labels,” on page 65.</td>
</tr>
</tbody>
</table>
Creative Tab

The **Creative** tab contains all creative-related functions. The following table lists and describes the tabs on the **Creative** tab:

*Table 2.4  Overview of the Creative Tab*

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creative</td>
<td>Lists all creatives that are loaded in the system. Creatives are the actual ad content delivered to the page. The list can be filtered by Name and Advertiser. For more information, see Chapter 9, &quot;Managing Creatives,&quot; on page 69.</td>
</tr>
<tr>
<td>Multiple Creative</td>
<td>Creates multiple creatives. For more information, see Chapter 10, &quot;Managing Multiple Creatives,&quot; on page 75.</td>
</tr>
<tr>
<td>Smart Upload</td>
<td>Parses third-party files and sets up multiple creatives. For more information, see Chapter 11, &quot;Managing Smart Upload,&quot; on page 77.</td>
</tr>
<tr>
<td>Name Patterns</td>
<td>Creates names that are associated with creatives that are uploaded from third-party vendors. For more information, see Chapter 12, &quot;Managing Name Patterns,&quot; on page 79.</td>
</tr>
<tr>
<td>Creative Formats</td>
<td>Lists all creative formats that are loaded in the system. Creative formats are based on two main elements: the format template (the code that is served to the visitor when a creative using this format is selected for delivery), and the accompanying format fields (which contain user-supplied data that is specific to each creative). Creative formats enable you to create your own standard creative templates. For example, if you have several types of text links that you use all the time, you can create a format for each link so that you do not have to re-create them each time. For more information, see Chapter 13, &quot;Managing Creative Formats,&quot; on page 81.</td>
</tr>
</tbody>
</table>
Tab Description

**MIME Types**
Lists custom MIME types that have been set up. This enables you to specify HTTP content types when a creative is delivered, which is useful for some browsers or applications. For more information, see Chapter 14, “Managing MIME Types,” on page 91.

---

**Targeting Tab**

The **Targeting** tab contains all targeting and demographic related items. When you select the **Targeting** tab, the **Targets** tab appears by default. The following table lists and describes the tabs on the **Targeting** tab:

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Targets</strong></td>
<td>Lists all the targets that are loaded in the system. Targets are collections of demographic data and tags that can be connected using Boolean logic. Demographic data is implemented as tags in the system. Targets can be thought of as reusable rule sets that can represent audiences or parts of audiences. Targets are also an important building block for Products. The list can be filtered by entering a search query in the <strong>Name like</strong> field. For more information, see Chapter 15, “Managing Targets,” on page 95.</td>
</tr>
<tr>
<td><strong>Tags</strong></td>
<td>Lists all tags and their values in the system. Tags are key=value pairs that are used for targeting. This list does not include predefined geotargeting tags. For more information, see Chapter 16, “Managing Tags,” on page 107.</td>
</tr>
<tr>
<td><strong>Tag Groups</strong></td>
<td>Lists all tag groups and their associated tags. Tag groups enable you to group a set of individual tags. For more information, see Chapter 17, “Managing Tag Groups,” on page 111.</td>
</tr>
<tr>
<td>Tab</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Tag Value Aliases</td>
<td>Lists the aliases for tag values. Reporting or forecasting on an alias is the same as reporting or forecasting on the tag value and the other aliases for the tag value. For more information, see “About Tag Value Alias” on page 113.</td>
</tr>
<tr>
<td>Sites</td>
<td>Lists all site values that are loaded in the system. Sites can function as a tag. For more information, see Chapter 19, “Managing Sites,” on page 115. Includes a quick link to Create Multiple Sites. For more information, “Add Multiple Sites” on page 116.</td>
</tr>
<tr>
<td>Areas</td>
<td>Lists all area values that are loaded in the system. Areas can function as a tag. For more information, see Chapter 20, “Managing Areas,” on page 119. Includes a quick link to Create Multiple Areas. For more information, “Add Multiple Areas” on page 120.</td>
</tr>
<tr>
<td>Sizes</td>
<td>Lists all creative sizes that are loaded in the system. For more information, see Chapter 21, “Managing Sizes,” on page 121.</td>
</tr>
<tr>
<td>Supertags</td>
<td>Lists special tags that can be included in an ad call and which is expanded into one of any number of arbitrary collections of other tags and values. Supertags can be used to ease a customer’s migration from other ad servers, and provides a level of tag management to ad operations. Essentially, supertags provide a way of mapping a value to an arbitrary pathinfo snippet. For more information, see Chapter 22, “Managing Supertags,” on page 123.</td>
</tr>
<tr>
<td>Connectors</td>
<td>Lists connectors that enable SAS 360 Match to set up secure connections to an external application.</td>
</tr>
<tr>
<td>Placements</td>
<td>Lists placements that partners can bid on. Placements can also be configured to use several partners. For more information, see Chapter 24, “Managing Placements,” on page 129.</td>
</tr>
</tbody>
</table>
Events

Lists events that allow an event name to be associated with one or more timestamps that correspond to a visitor action (such as visiting a certain page). For more information, see Chapter 25, “Managing Events,” on page 135.

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Events</strong></td>
<td>Lists events that allow an event name to be associated with one or more timestamps that correspond to a visitor action (such as visiting a certain page). For more information, see Chapter 25, “Managing Events,” on page 135.</td>
</tr>
</tbody>
</table>

Assets Tab

The **Assets** tab contains all creative media (such as images or rich media) and creative code (such as HTML or Javascript). When you click the **Assets** tab, the **Media** tab appears by default. The following table lists and describes the tabs on the **Assets** tab:

Table 2.6   Overview of the Assets Tab

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Media</strong></td>
<td>Lists all creative media that are uploaded in the system. The list can be filtered by advertiser. Selecting a media entry enables you to download the asset and view the creatives that use the asset. For more information, see Chapter 26, “Managing Media,” on page 139.</td>
</tr>
<tr>
<td><strong>Advertiser Creative Templates</strong></td>
<td>Lists all advertiser-specific creative templates that are uploaded in the system. Creative templates are typically third-party tags, and HTML and JavaScript code. These assets are used in the <strong>HTML</strong> field of a creative. The list can be filtered by name and advertiser. Selecting a creative template enables you to upload code, edit or enter code, and view the creatives or Name that use the asset. For more information, see Chapter 27, “Managing Advertiser Creative Templates,” on page 141.</td>
</tr>
<tr>
<td><strong>Snippets</strong></td>
<td>Lists snippets that can be added to a creative. For more information, see Chapter 28, “Managing Snippets,” on page 151.</td>
</tr>
</tbody>
</table>
Sales Tab

The Sales tab contains the Sales Workflow portion of SAS 360 Match. The following table lists and describes the tabs on the Sales tab:

**Table 2.7  Overview of the Sales Tab**

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFPs</td>
<td>Lists all request for proposals (RFPs) that are loaded in the system. For more information, see Chapter 29, “Managing RFPs,” on page 157.</td>
</tr>
<tr>
<td>Proposals</td>
<td>Lists all proposals that are loaded in the system. For more information, see Chapter 30, “Managing Proposals,” on page 161.</td>
</tr>
<tr>
<td>Products</td>
<td>Lists all products that are loaded in the system. Products are constructed from rate card data and targeting, and enable proposals, line items, and availability to be used. It is helpful to have a robust product catalog to enhance the process. A thorough set of key/values (taxonomy) results in effective targets and products. An efficient product list makes managing proposals and tracking availability easier. For more information, see Chapter 31, “Managing Products,” on page 175.</td>
</tr>
<tr>
<td>Uplifts</td>
<td>Lists uplifts that can be added to a line item. Uplifts consist of a tag and a list rate that can be applied to line items. Products or specific values of the tag can be added to uplifts. For more information, see Chapter 32, “Managing Uplifts,” on page 183.</td>
</tr>
<tr>
<td>Terms and Conditions</td>
<td>Lists all terms and conditions that are loaded in the system. For more information, see Chapter 33, “Managing Terms and Conditions,” on page 187.</td>
</tr>
</tbody>
</table>
### Customers Tab

On the **Customers** tab, you set up customers such as advertisers or agencies in the system. User accounts are not set up on the **Customers** tab. The following table lists and describes the tabs on the **Customers** tab:

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Advertisers</strong></td>
<td>Lists all advertisers that are loaded in the system. For more information, see Chapter 38, “Managing Advertisers,” on page 203.</td>
</tr>
<tr>
<td><strong>Agencies</strong></td>
<td>Lists all agencies that are loaded in the system. For more information, see Chapter 39, “Managing Agencies,” on page 209.</td>
</tr>
<tr>
<td><strong>Publishers</strong></td>
<td>Lists all publishers that are loaded in the system. This tab is typically used for clients that have a network of different sites (publishers). For more information, see Chapter 40, “Managing Publishers,” on page 213.</td>
</tr>
<tr>
<td>Tab</td>
<td>Description</td>
</tr>
<tr>
<td>----------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Industries</td>
<td>Lists all industry classifications that are loaded in the system. For more information, see Chapter 41, &quot;Managing Industries,&quot; on page 217.</td>
</tr>
<tr>
<td>Regions</td>
<td>Lists all regions that are loaded in the system. Regions can be assigned to advertisers and agencies. For more information, see Chapter 42, &quot;Managing Regions,&quot; on page 219.</td>
</tr>
</tbody>
</table>

**Partners Tab**

You use the Partners tab to set up the third-party integration. For more information, see Chapter 43, "Managing Partners," on page 223.

**Reports Tab**

You access the operational reports and Business Intelligence (BI) reports on the Reports tab. For more information, see Chapter 44, "Managing Reports," on page 231.

**Admin Tab**

You perform administrative tasks on the Admin tab. The following table lists and describes the tabs on the Admin tab:

**Table 2.9  Overview of the Admin Tab**

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Settings</td>
<td>Specify targets in the No Log Targets field to prevent requests that match from being logged. For more information, see Chapter 47, &quot;Settings,&quot; on page 245.</td>
</tr>
<tr>
<td>Tab</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Users</td>
<td>Enables administrators to create individual accounts for users so that actions performed by the user are identifiable and logged. Individual accounts also enable administrators to easily remove users from the system (for example, when they leave the company) without having to modify the password for all users. For more information, see Chapter 48, “Users,” on page 247.</td>
</tr>
<tr>
<td>SSOs</td>
<td>Enables administrators to create a Single sign-on (SSO) to provide a way of authenticating users in SAS 360 Match through a third-party identity provider (IDP). For more information, see Chapter 49, “Single Sign-On,” on page 251.</td>
</tr>
<tr>
<td>Roles</td>
<td>Enables administrators to assign roles to users. These roles enable administrators to limit or grant access to the user interface and to report for groups of user accounts. Every user in the system must be assigned at least one role, but each user can be assigned up to five roles in combination with teams. Each role has a set of configurable permissions. For more information, see Chapter 50, “Roles,” on page 257.</td>
</tr>
<tr>
<td>Teams</td>
<td>Enables administrators to group user interface users and to associate these groups with specific Products. These user groupings might then be restricted to interact with only Products to which they are assigned and Products that are unassigned. For more information, see Chapter 51, “Teams,” on page 261.</td>
</tr>
<tr>
<td>Currency</td>
<td>Enables administrators to modify conversion rates for predefined currencies that are specified in flights and line items. For more information, see Chapter 52, “Currency,” on page 263.</td>
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<tr>
<td>Logs</td>
<td>Enables administrators to view activity history logs for users. For more information, see Chapter 53, “Logs,” on page 265.</td>
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PART 2

Ad Traffic

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Managing Campaigns

About Campaigns

The hierarchy of a campaign in SAS 360 Match reflects the elements that usually make up an order from one of your customers. The campaign is the container (the overall order) that holds flights (the line items that are the detailed delivery information) which, in turn, hold creatives (the text, images, video, and so on, that are served). You can copy and send tag information for campaigns and flights.

Add a Campaign

1. On the top navigation bar, click the Traffic tab. The Campaigns subtab appears by default and lists campaigns currently in your system. If you are returning to the Campaigns subtab after a search filter has been applied, only the filtered list of campaigns is displayed.

TIP In the Sales tab, a salesperson works with proposals and line items. When these are converted into an order, you can automatically transfer proposals into campaigns and line items into flights.
2 Click **Add New Campaign**.

3 In the **Name** field, enter a name for the campaign.

   **Note:** You can enter only alphanumeric characters (a–z, A–Z, 0–9), special characters (~@#$%^&*-+(){}|<>"='), spaces, underscores, and punctuation marks (!.,?;:).

4 In the **Advertiser** field, enter the first few letters of the advertiser’s name and then select the advertiser from the autosearch results. The advertiser that you select is the one that you use when creating the campaign.

   To create a new advertiser for the campaign, click **Add a new advertiser**. For more information, see “Add an Advertiser” on page 204.

   **Note:** Use wildcard characters to refine the possible values. Use % to specify a wildcard of any length, _ to specify a wildcard of a single character, or ^<keyword> to search for the keyword at the beginning of the string.

5 To add an agency, enter the name in the **Agency** field. The agency must already have been defined on the **Customers** tab.

   To create a new agency for the campaign, click **Add a new agency**. For more information, see "Add an Agency" on page 209.

   **Note:** To display the full list of agencies, enter %.

6 From the **Type** list, select one of the following campaign types. Although the names are fixed in the solution, you might use them to define campaigns to meet your business needs. You can report on these campaign types, so you should ensure consistency across the system. Selecting a campaign type does not make it more important in the ad queue; it is just a label for reporting. For a house-filler campaign, select **House**.

   - **Guaranteed**
     This type is usually applied to campaign flights that have impression goals and a required end date.

   - **Pre-emptible**
     This type is usually applied to campaign flights that are redirects to third-party networks or remnant inventory.

   - **Sponsorship**
     This type is usually applied to campaign flights that are consuming all the impressions for a product or target for a specific amount of time.

   - **House**
     This type is usually applied to campaign flights that create no direct revenue. For example, you might apply the House type to ads for another site you also own or to a house-filler campaign.

   - **Barter**
     This type is usually applied to ads that create no direct revenue. For example, you might run ads for a charitable organization.
Make good

This type is usually applied to campaign flights that are attempting to complete a contracted volume of impressions that did not complete in the allotted time.

7 Select a Salesperson or Trafficker or both from the lists. You can select more than one trafficker.

Defining a salesperson and a trafficker helps with reporting. They are the named users that have access to view these campaigns. If you are not entering a campaign as a trafficker user, then you should select a name here. Only the named trafficker or users with AdOps Manager or Administrator permissions can adjust or view a campaign.

To add a new salesperson, click Add a new Salesperson.

8 (Optional) Select a Trafficker 2 from the list.

9 Select a start date. When you click the Start date field, a calendar appears. Select the date on which the campaign should start.

10 Select an end date. When you click the End date field, a calendar appears. Select the date on which the campaign should end.

An end date is optional but the advertiser usually provides one. You should define an end date to ensure proper scheduling.

11 Enter information in the External ID, Description, and Notes fields. These fields are used for reporting purposes and integrations in the XML API.

12 Expand the Send Reports panel and then do the following:

a To send a campaign report to selected users at the end of the campaign, select Reports on end.

b To send a campaign report to selected users at the end of the week, select Reports at week end.

c To send a campaign report to selected users at the end of the month, select Reports at month end.

d To mail campaign reports to a salesperson, select Salesperson.

e To mail campaign reports to a trafficker, select Trafficker.

Note: The email addresses for the salesperson and trafficker are stored with their login details.

f To mail campaign reports to other users, enter the users’ email addresses in the Other field.

Note: Use a semicolon (;) to separate multiple addresses.

g To define the file type for the campaign report attachment that is emailed, select CSV or EXCEL from the Attach as list.

13 To apply a frequency cap (sometimes referred to as controlled exposure), enter the information in the Frequency Caps panel. Any capping rules that are applied
here apply to all flights, creatives, and creative formats included in this campaign.

**Note:** You can also apply capping rules at the flight, creative, or creative format level. It is recommended that you do not apply caps to house-filler campaigns.

In the **Frequency Caps** panel, do the following:

- Enter a value in the **Quantity** field to specify the number of impressions, views, clicks, or conversions to serve to a visitor.

- Enter a value in the **Period** field to specify the period of time that must elapse after the quantity is reached for impressions, views, clicks, or conversions before a visitor is eligible to receive the flight again. For example, if you enter 3 in the **Quantity** field and 1 week in the **Period** field, once a flight is shown three times to a visitor, the flight is not shown again to the visitor until after a one-week waiting period.

**Note:** You must enter an integer value in the **Period** field. For example, enter 1 hour instead of hour. A per day period indicates a calendar day that runs from midnight of one day to midnight of the next day instead of a 24-hour time span. A month indicates 30 days instead of the actual number of days of a specific month.

- Enter a value in the **Over Lifetime** field to specify the number of impressions, views, clicks, or conversions to serve to a visitor over the lifetime of the flight.

- Enter a value in the **Per Session** field to specify the number of impressions, views, clicks, or conversions to serve to a visitor over the course of a visitor session. A visitor session is initiated whenever an ad request is made, and then, by default, persists for 30 minutes after the visitor’s last request.

14 Click **Add New Flight** to add a flight to the campaign. You can add the flight now or add it later. For more information, see “Add a Flight to a Campaign” on page 24.

15 Click **Save Campaign**. A message indicating that a campaign has been successfully created is displayed in the All Campaign window. By default, the new campaign appears at the top of the list.

To view a summary of the information for the new campaign, click on the campaign name. Progress information also appears when the campaign starts delivering. You can copy and send tag information for the campaign by clicking **Export Tags**. A pop-up window appears with both HSERVER and JSERVER tags to enable trafficking of IA campaigns or flights in other ad-serving systems. Click **Copy** to select and copy the tags.

To edit the campaign, click **** in the row for the campaign, make desired edits, and then click **Save Campaign**.

To delete a campaign, click **** in the row for the campaign, and then click **OK**.

To copy a campaign, click **** in the row for the campaign. You can then copy just the campaign, the campaign and its associated flights, or the campaign, associated flights, and the shift remainders.
View a Campaign

1. On the top navigation bar, click the **Traffic** tab. The **Campaigns** subtab appears by default and lists all the campaigns currently in your system. If you are returning to the **Campaigns** subtab after a search filter has been applied, only the filtered list of campaigns is displayed.

   - Select **View My Campaigns** to list the campaigns where you have been assigned as a salesperson, a trafficker, an advertiser, or an agency.
   - Select **View Team Campaigns** to list the campaigns that are created by members of your teams or the campaigns that are converted from proposals that were created by members of your teams.

     Note: This option appears only if you belong to a team.

2. (Optional) Use the **Filtering** panel to refine the list of campaigns displayed.

   - Enter a portion of the campaign name in the **Name like** field.
   - Set the **Status** of the campaign.
   - Search for an **Advertiser**.

     Note: Enter the first few characters in the name to see the list of advertisers.

   - Select the **Salesperson**.
   - Select the **Trafficker**.
   - Click **Filter**.

3. Select the campaign to view the campaign dashboard. The dashboard shows the **Start date** and **End date** for the campaign, the **Forecast Ends On** date for the end of the forecasting period, as well as the total number of impressions, views, and clicks.

   In the bar chart, data for projected impressions are shown until the end of the campaign or until the end of the forecasting period, whichever comes first. By default, the forecasting period is 90 days. Contact SAS Technical Support at support@sas.com to change the forecasting period. For information about traffic simulation in SAS 360 Match, see **Simulation Process Overview**.

   To view unique user data, check the **Show Unique User Data** check box. You can set the bar chart to display data for views or clicks from the start of the campaign as well as projected impressions and impressions together. Place your pointer over the chart to see the data for each bar.

   - Data is displayed in daily increments for campaigns that are less than three weeks long. The horizontal axis is labeled by month and date, using two digits for the month and two digits for the date. For example, August 19 is labeled as 08-19.
Data is displayed in weekly increments for campaigns that are between three weeks long and two months long. The horizontal axis is labeled by week of the year. For example, the 15th week of the year is labeled as Week 15.

Data is displayed in monthly increments for campaigns that are more than two months long. The horizontal axis is labeled by year and month, using the last two digits of the year and the two digits that represent the month. For example, August 2018 is labeled as 18-08.

The doughnut chart displays the categories of devices that have been served during the campaign. The devices are grouped into the following categories:

- Desktop (browsers and media players)
- Mobile (mobile phones, tablets, and e-book readers)
- TV (set-top boxes, televisions, and game consoles)

Add a Flight to a Campaign

A flight contains the detailed instructions, such as targeting options, and the creative that a campaign should deliver. A campaign must contain at least one flight, but it can contain many flights, depending on the advertiser’s instructions. Flights can serve only within the date ranges applied at the campaign. You can copy and send tag information for campaigns and flights.

To create a flight:

1. On the top navigation bar, click the Traffic tab.
2. Click the Campaigns subtab. Campaigns currently in your system are listed. If you are returning to the Campaigns tab after a search filter has been applied, only the filtered list of campaigns is displayed.
3. Click on the name of the campaign to which you want to add a flight.
4. Click Add New Flight. The Edit New Flight page appears. The campaign name and the advertiser are listed at the top of the page.
5. In the Name field, enter a name for the flight.
6. From the Status list, select one of the following:
   - Open: The flight can be served through the ad server.
   - Pending: The flight automatically starts being served as soon as the start date or start time is reached, or when the status is changed to Open.
   - Closed: The flight will not be served.
   - Missing creative: No creatives are assigned to the flight, so the flight is not eligible to be served.

Note: You can enter only alphanumeric characters (a–z, A–Z, 0–9), special characters (~@#$%^&*(){}[]\|/<>"='), spaces, underscores, and punctuation marks (.,?:;).
- **Paused:** The flight is not in the delivery rotation but resumes being served after the status is changed to **Open**.

- **Alerted:** The Reports on end option is selected in the **Send Reports** panel of the Edit Flight window. When the flight has completed, its status is set to **Alerted** to indicate that the end-of-flight email alerts have been sent.

7 Select a size from the **Reservation Size** list. Reservation sizes enable flights that might be missing a creative to still be included in the forecasting simulation and removed from the available inventory.

8 Select a label from the **Flight Type** list. All flight types except **Beacon** are applicable only in reporting and inventory forecasting.

Note: Beacon flights are not held in the regular flight queue and do not respond to ad request directives. However, flight status, start and end dates, and so on are still relevant and control whether such a flight is active. A beacon flight should have creatives that use network creative formats. The creatives using these formats would typically request a third-party beacon. When a COUNT request that includes a FLIGHTID or a flight creative ID (FCID) tag referencing the beacon flight is received, the network creative is requested and an impression is incremented for the relevant FCID.

9 To set the flight’s general position in the ad queue, select from the **Tier** list. For more information, see “About Tiers” on page 45.

10 Select the time zone for the flight from the **Time Zone** list.

Note: By default, the time zone is based on your user setting or on the system time zone if your user setting does not have a time zone set. Time-related elements of the flight, such as the start and end dates and the daily window, use this time zone.

11 Set a **Start date** and start **Time** for when the flight starts serving.

12 Set an **End date** and end **Time** for when the flight stops serving.

13 To configure the flight to serve during a specific time window each day, select **Daily Window** and then select a **Start Hour** and an **End Hour** to specify a range of time during which the flight will deliver each day. If this option is not selected, flights can deliver at any time.

14 Select a **Currency** from the list. This is the currency the flight is billed in, which can be different from the system base currency. For example, this might be a flight built by your team in London and billed out in pounds instead of dollars. The associated **Conversion rate** is displayed.

15 (Optional) Set a price adjustment for the flat rate or the CPM rate.

Note: This field is disabled by default. Contact SAS Technical Support at support@sas.com to enable this option.
When a price adjustment is configured for a flight that is assigned to a tier that uses CPM or eCPM prioritization, the flight is prioritized using the adjusted CPM or eCPM value.

a Select an **Adjustment Type** to change the rate.

- If the adjustment type is **Currency ($ CPM)**, an absolute adjustment is made to the rate. This option works if only one CPM rate is defined.
- If the adjustment type is **Percent**, the adjustment is applied to all the costs that have been defined.

b In **Adjustment Amount**, use + to increase the cost and – for a discount.

c Add an **Adjustment description**.

**Note:** When specified, discounts for the advertiser and product, as well as the agency year-end discount, are always applied. The agency standard discount and commission are applied if the product is configured to enable those values to be applied. Adjustments and discounts are included in eCPM calculations for tier prioritization and bidding.

Multiple discounts are applied individually not cumulatively. For example, a 10% advertiser discount and a 10% product discount are applied one at a time. The final discount does not add up to a 20% discount.

16 To assign a product that contains targeting demographics tied with revenue data to the flight, enter information in the **Product** field.

**Note:**

A well-defined set of products can keep you from having to select other targeting modifiers in the rules section. You can require that a flight must have at least one assigned product before it can be saved. To enable this setting, go to **Admin Settings**.

17 **The Product Line** is populated based on the category selected. The product line enables you to define a genre of products for reporting purposes. Choose a product line from the drop-down list to override the selection.

**Note:**

Contact SAS Technical Support at support@sas.com to enable the product line option and to specify the categories for product lines.

18 A **Conversion Rate** appears if the currency for the line item is not the base currency and has a conversion rate set. For each line item, the conversion rate specifies how many units of the currency are equivalent to one unit of the base currency.

**Note:** The default conversion rate is 1.0. Specify conversion rates in **Admin Currency**.

19 **The Published** status is displayed that shows whether the current version of the flight is published. The value is set to no when a creative, a flight creative, or a flight is updated but has not been published.
20 Set up reports to be emailed at specified intervals in the Send Reports panel.

a Select when to send flight reports to users.

- Choose **Reports on end** to send a flight report at the end of the flight.
- Choose **Reports at week end** to send a flight report every Monday at midnight.
- Choose **Reports at month end** to send a flight report at midnight on the first day of every month.

**Note:** The date and time are determined by the time zone used by the application.

b In the **Mail to** option, select whether the **Salesperson** or the **Trafficker** assigned to the campaign should receive reports.

**Note:** The email addresses for the salesperson and trafficker are stored with their login details.

c To send campaign reports to additional users, enter their email addresses in the **Other** field.

**Note:** Use a semicolon (;) to separate multiple addresses.

d To define the file type for the campaign report attachment that is emailed, select **CSV** or **EXCEL** from the **Attached as** list.

21 To include additional information about a flight in reports, navigate to the Description panel and enter information in the **Description**, **Notes**, **User Info**, and **External ID** fields.

22 In the Goals & Revenue panel, do one of the following:

- To apply a flat rate revenue to the flight, select **Flat Rate** and then do the following:
  - Enter a value in the **Flat Rate** field. The revenue is calculated by the amount entered not per impression.
  - Enter a value in the **Goal** field for impressions, views, clicks, and actions. The flight attempts to serve enough to meet the goals specified in the fields in the time specified and as evenly as possible. When the goals are reached, the flight stops serving. A views goal can be set on flights when the viewability feature is enabled for the page where the flight is serving.
  - Enter a value in the **Bonus** field for impressions, views, clicks, and actions. Revenue is not applied to bonus amounts. The amounts are treated as part of the overall goal by the ad server.

- To apply a cost to every thousandth instance of an impression, click, or action, select **Cost Per** and then do the following:
  - Enter a value in the **Cost Per** field for the clicks per thousand for impressions, and cost per single views, clicks, and actions.
Enter a value in the Cost Per field for the Daily Revenue Cap. The flight serves normally each day until reaching the revenue amount that is specified in this field.

The Daily Revenue Cap limits a flight's impressions when a specified revenue cap is reached each day. Revenue is calculated using the Cost Per values for impressions, clicks, and actions, along with the current day's impressions, clicks, and actions. A flight serves impressions regularly according to its priority and serving rate until the revenue cap is reached for the 24-hour period that begins at midnight. When the daily revenue limit is reached, the flight is not eligible to serve again until the flight's revenue is reset to zero at midnight for a new 24-hour period.

For example, setting Cost Per for impressions to 1.0 means that the revenue for 1,000 impressions is $1. If Daily Revenue Cap is 10.0, the flight can serve up to 10,000 flights per day.

The Daily Revenue Cap overrides engine priority. Even if a flight is behind schedule, the revenue cap is maintained. If the cap is set too strictly, the flight might not meet its goal. However, the revenue cap cannot force a flight to over serve, so a flight will never get ahead of schedule because of the cap.

**Note:** The revenues that are shown in reports reflect the values that you use. You do not have to specify real-world values for the flight to be capped daily, but the report revenues are not accurate if you do not use real-world values. In many cases, the flights cannot match the daily revenue cap exactly, so flights might be slightly over or under served.

- Enter a value in the Goal field for impressions, views, clicks, and actions. The flight attempts to serve enough to meet the goals specified in the fields. When the goals are reached, the flight stops serving. A views goal can be set on flights when the viewability feature is enabled for the page where the flight is serving.

- Enter a value in the Bonus field for impressions, views, clicks, and actions. Revenue is not applied to bonus amounts. The amounts are treated as part of the overall goal by the ad server.

The effective cost per thousand, or ECP, is automatically calculated and displayed in the table.

23 In the Inventory panel,

- To include contending flights in the inventory projection, click Contending Flights.

In the availability report:

- Results are limited to 100 entries from flights in tiers that are not pre-emptible.

- Flights that are targeted for different sites do not contend with each other.

- If you choose the contending flights option, inventory changes during the day are not included in the calculation.

- The Reserved column in the availability report is the number of impressions that are consumed by a flight from the product for the future date range that is specified by the user.
To perform an ad hoc projection of all pre-emptible inventory using the product specified on the flight, click **Available**.

The search examines all pre-emptible inventory in the forecast that matches the targeting and date range for flights that are in a tier with the **Pre-emptible** option selected.

**Note:** This calculation incorporates any default ads that appear in the forecast and match the flight's criteria. Results are split into values for available, reserved, projected, and served. Contending flights can be used when ad inventory is not available.

To set a goal for the inventory, click **Set Goal** and then enter a value.

24 Use the **Frequency Caps** panel to set options that affect the frequency limits for impressions, views, clicks, or conversions.

- Enter a value in the **Quantity** field to specify the number of impressions, views, clicks, or conversions to serve to a visitor.

- Enter a value in the **Period** field to specify the period of time that must elapse after the quantity is reached for impressions, views, clicks, or conversions before a visitor is eligible to receive the flight again. For example, if you enter 3 in the **Quantity** field and 1 **week** in the **Period** field, once a flight is shown three times to a visitor, the flight is not shown again to the visitor until after a one-week waiting period.

**Note:** You must enter an integer value in the **Period** field. For example, enter **1 hour** instead of **hour**. A **per day** period indicates a calendar day that runs from midnight of one day to midnight of the next day instead of a 24-hour time span. A month indicates 30 days instead of the actual number of days of a specific month.

- Enter a value in the **Over Lifetime** field to specify the number of impressions, views, clicks, or conversions to serve to a visitor over the lifetime of the flight.

- Enter a value in the **Per Session** field to specify the number of impressions, views, clicks, or conversions to serve to a visitor over the course of a visitor session. A visitor session is initiated whenever an ad request is made, and then, by default, persists for 30 minutes after the visitor’s last request.

For more information, see "About Frequency Capping" on page 83.

25 To set options that affect delivery of the flight, expand the **Delivery Configuration** panel, and then do the following:

- To force the flight to serve as quickly as possible by making it the highest priority flight in the tier and bypassing any type of pacing, select **Top priority**. This option also prevents the flight from being skipped over if it has been seen recently by the visitor.

**CAUTION**

Enabling this option can cause the flight to deliver its impression goal before the end date.

Selecting the **Top priority** option in a flight does not affect how the flight is delivered in a weighted tier. For example, flights A and B are in a weighted tier, each with a weight of 1 so that their share of delivery in the tier is each
50 percent. Flight A has the **Top priority** option selected but Flight B does not. SAS 360 Match does not give preference to Flight A when selecting an ad from the tier.

- To append HTML code for a 1x1 image in the server response when a creative is served from the flight, select **Beacon count** or deselect **Disable beacon count**.

**Note:** The check box that you see is dependent on your global beacon count setting. If your global beacon count is turned off, you will see the **Beacon count** check box. Otherwise, you will see the **Disable beacon count** check box. By default, this global setting is turned off. Contact SAS Technical Support to turn on the global beacon count setting.

An impression is not counted until the 1x1 image is rendered by the browser. This ensures that the creative code is completely processed first by the browser. This option is useful when serving third-party creatives because it can minimize impression discrepancies between third-party ad servers and SAS 360 Match.

Select **Frequency cap based on beacon** to enable impression-based frequency capping to be based on beacon counts rather than actual flight serves.

**Note:** Do not select beacon count for a flight that delivers ads to emails because the email reader does not allow the beacon count URL to be written into the page. Therefore, the delivery to the ad would not be counted. If beacon count is enabled across all flights, you should disable it.

- From the **Creative selection method** list, select one of the following methods:
  - The **Weighted** method is the default. When there are multiple creatives in a flight, the weight (or ratio) is used to determine how often to serve each creative. By default, every creative has a weight of 1, so each creative is served equally.

  Weighting can be ineffective in some situations, such as for a flight that has a set of differently sized creatives with weights that do not match the weight ratios for each size for the ad requests received. For example, if 20 percent of the ad requests are for a 728 x 90 creative but the creative of that size has a weight (or ratio) of 40 percent, the flight cannot meet the weight requirements. This also applies to creative-level targeting.

  - The **Sequential** method enables the weights to be used as a number sequence, so that it is possible to display multiple creatives in a specified order when the flight is served. The sequence restarts with each new user session.

  **Note:** The sequential method does not always start with the first ad in the sequence if the number of sequential ad requests is less than the number of sequential ads. For example, if there are two sequential ad requests on the page and three sequential ads in the flight, the first page view might deliver ads 1 and 2, but a refresh of the page might show ad 3 followed by ad 1.
The **CTR Optimized** method delivers the creative with the best click-through rate (CTR) over creatives with lower CTRs.

**Score Optimized**
Select an optimization method and enter a sample size for this method. The sample size must be a positive integer.

The **Prioritized** method orders the creatives in a particular sequence similar to the Sequential method. With this option, the creatives are always evaluated in the specified order, every time, starting with the first. If the first cannot serve, the second is evaluated, then the third, and so on. The flight is skipped only if all of the creatives have been checked and none can serve.

You can create a companion (or roadblock) flight that simultaneously delivers multiple creatives within a flight to a page. The companion feature can be used only within a flight, and not across flights. Multiple flights cannot be created as companions of each other. Having only one creative in a flight that uses a companion type does not prevent that creative from being delivered, despite not having a companion creative. In the **Companion type** list, select one of the following types:

- **None** to disable the companion feature. This is the default value.
- **Strict** to enable the companion or roadblock feature to serve multiple creatives from the same flight to the same page at the same time. The strict type requires two or more creatives in the flight that satisfy the sequential requests on a page. A flight with the strict companion type serves only if you select it as the first ad request on the page and if the flight has not reached the limit of an existing frequency cap. Ad requests are grouped by a view ID and a cookie ID.

When a flight with a strict companion type is served, the following can occur:

- If there is a creative that is available in this flight for the first ad request from the page, then the engine delivers the flight.
- If the creatives in the flight meet the criteria for the subsequent group of sequential ad calls on the page, then the engine delivers the flight for those requests, as long as the frequency cap is not met.
- If the creatives in the flight do not meet the criteria of the subsequent ad calls on the page, then the engine cancels the flight with the strict companion type for the remainder of the page.
- If there are multiple ad requests on the page and the flight with the strict companion type cannot deliver to all of them, other matching flights with a strict companion type cannot deliver the remaining unfulfilled ad requests. Flights with a loose companion type can be served.
- The URLs for the ad call must contain a view ID string for a companion ad to deliver. A set of URLs for ad calls with the same view ID is considered a page.

The first ad request that is received by the ad server might not be displayed in the top ad position on the page because the second, or subsequent, ad request on the page might arrive at the ad server first. If the ad call is eligible for a strict flight creative, it can receive the ad request. However, if the top ad call (received by the ad server later) does not meet the criteria for this flight or if the frequency cap has been met,
the strict flight is canceled for the remainder of the ad requests on the page.

Use the bserver ad call method to order the sequence of ad calls that are received. The method enables the ad requests to be sequenced in any order. Therefore, the first ad slot on the page might not be the first ad request in the bserver ad call method, which can cause companion flights to be canceled.

- **Loose** for creatives that satisfy only some of the ad calls on the page. If the first ad is served from the companion flight but the second is not, the application still tries to serve the ad from the companion flight on sequential ad requests. A loose companion type is the recommended option.

When a flight with a loose companion type is served, the following can occur:

- The flight is not required to deliver first to the page. It can deliver to any number of ad calls on a page.
- Other flights can be delivered between the delivery of creatives from a flight with a loose companion type on the page.
- The URLs for the ad call must contain a view ID string for a companion ad to deliver. A set of URLs for ad calls with the same view ID is considered a page.
- Once a flight with a loose companion type begins delivering to the page, no other companion flights can serve to the page.

The frequency cap takes precedence over the companion policy for a flight that is configured with both options. This means that the flight with a companion policy can be canceled after serving some ads if its frequency cap is reached. This allows other flights to deliver to the subsequent ad calls on the page. Flights with strict or loose companion policies deliver together consistently when there is no frequency capping.

A companion policy overrides the **Eliminate Duplicate Flights** and **Eliminate Duplicate Advertisers** settings for the tier.

- (Optional) In the **Sticky Duration** field, enter a value to denote the amount of time that you want the creative to persist.
- (Optional) In the **On schedule priority** field, enter a value to denote the prioritization level. Double-click the field name to enable and set the value.

On-schedule priority is the priority above which a flight is regarded as ahead of schedule. When this setting is greater than 1.0, the flight can get ahead of its ideal schedule. If the priority value is less than 1.0, the flight delivery can fall behind schedule. In both cases, the flight can still eventually achieve its goal. This setting establishes the maximum priority that is permitted at the start of the flight. The priority is gradually diminished to 1.0 by the end of the flight in an attempt to prevent the flight from expiring early. However, there is a possibility that the flight might expire early.

When on-schedule priority is greater than 1.0, delivery patience should be less than 1.0. If delivery patience is 1.0, the flight projects a straight line from its current position to its goal and will not attempt to get ahead of schedule.

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**Note:** The settings for on-schedule priority and delivery patience are enabled together. Contact SAS Technical Support at support@sas.com to enable
these options. The following are on-schedule priority and delivery patience settings:

- default global settings. All flights use 1.0 for both settings.
- user-defined global settings. Specify on-schedule priority and delivery patience values for all flights. Contact SAS Technical Support to configure the values.
- individual settings for each flight. Each flight has its own values for on-schedule priority and delivery patience. Contact SAS Technical Support to enable the fields so that you can configure individual settings for each flight.

(Optional) Select the **Dynamic Delivery Patience** check box to automatically adjust how flights are paced so that they have the opportunity to catch up. Double-click the field name to enable it.

**Note:** When **Delivery Patience** has a value, this setting is not used.

Delivery patience can increase the pacing of flights to take advantage of narrow targeting. It affects the flight’s allowed serve rate when it is behind schedule and when inventory is available. With this option, the value of delivery patience ranges between 0.0 and 1.0 when the flight’s priority is calculated.

When the delivery patience is 0.0, the flight attempts to get back on schedule as soon as possible. Lower delivery patience values result in a higher desired serve rate for the flight. The lower the value of delivery patience, the more aggressively the flight attempts to get back on schedule.

When the delivery patience is 1.0, the flight is the least aggressive in trying to get back on schedule. The flight calculates a serve rate that, if met, gets it back on schedule by the end of the flight.

Values between 0.0 and 1.0 affect the pace of the flight so that it catches up to its schedule between the current time and the end of the flight. For example, a delivery patience of 0.25 attempts to pace the flight to catch up in a quarter of the flight’s remaining time, whereas a delivery patience of 0.50 attempts to pace the flight to catch up in half of the flight’s remaining time.

The dynamic delivery patience is equal to the current calculated priority. For example, when the flight is on schedule with a priority of 1.0, the delivery patience is also 1.0. If the flight falls behind slightly with a priority of 0.9, then the delivery patience is also 0.9, and the serve rate is not aggressive in returning the flight to schedule. But if the flight falls far behind with a priority of 0.4, then the delivery patience is also 0.4 and the serve rate is much more aggressive.

The serve rate is in effect only if inventory becomes available. Then the flight takes advantage of available inventory to get back on schedule, at which point the delivery patience increases again.

(Optional) Use the **Delivery Patience** slide control to set a value for delivery patience between 0.0 and 1.0 to account for changes in the schedule. Double-click the field name to enable this setting.
Note: Contact SAS Technical Support at support@sas.com to enable this option. When **Dynamic Delivery Patience** is selected, this setting is not used. This setting and the on-schedule priority setting are enabled together.

26 To place flights in a shared category so that they do not serve at the same time to the same page, expand the Categories panel, and then select an item in the **Categories** list. Advertisers cannot display ads at the same time when they belong to the same category. However, an advertiser does not compete with itself and, therefore, can serve more than once to a given page. Add categories when you are creating or editing the advertiser in **Customers** ⇒ **Advertisers**. For more information, see “**Edit an Advertiser**” on page 206.

27 To define where or to whom a flight can serve and cannot serve, expand the **Targets** panel.

- From the **Targets group logic** list, select **Match All** or **Match Any**.
  - **Match All** is the equivalent of using the Boolean AND operator. All statements must be true for the target to match and the flight to serve.
  - **Match Any** is the equivalent of using the Boolean OR operator. If any of the statements are true, the target matches and the flight is served.

- In the **Targets** field, search for and select a target. Define targets in **Targeting** ⇒ **Targets**. For more information, see “**About Targets**” on page 95.

28 In the **Rules** panel, do the following:

- Select **Match All**, **Match Any**, **Don't Match All**, or **Don't Match Any**. This global operator applies to all the target types that are specified in this section. For more information, see “Defining Targets” on page 96.

- Define your key and value pairs.

  Note: The target definition string is limited to 32,731 bytes. The string is the concatenation of the rules from the target_rules table, which is stored in the definition field of the targets table.

- Specify the target type in the text field on the left. As you type, a drop-down list of matching key names and target types is displayed. Select an existing entry or create a new target type. All target type names are converted to uppercase. Names for target types that you create cannot contain spaces or Unicode.

- Select an operator to define the relationship between the target type on the left and the value on the right.

  Note: The operators that are available depend on the target type that is selected on the left.

- In the text field on the right, enter the value that is related to the target type on the left. This field is limited to 32,680 bytes.

- To add more target types, click +.
To create groupings of the key and value pairs, click on an empty row. The operator in the group applies to the key/value pairs in the group and overrides the global operator.

Expand the Sites & Areas panel. By default, all sites and areas are selected to be served by the flight.

Note: The number of sites and areas determines how the selections are displayed. If there are fewer than 800 site or area values, you can select your options from a drop-down menu. If there are more than 800 site or area values, you can type in a text box to display matching options.

To specify sites that the flight can serve to, select Selected Sites, and search for and select Sites. To add a site that the flight can serve to, click Add a new site, enter information in the required Name field, and in the optional Description and Revenue cut fields, and then click Add Site.

To specify areas that the flight can serve to, select Selected Areas, and search for and select Areas. To add an area that the flight can serve to, click Add a new area, enter information in the required Name field and the optional Sites field, and then click Add Area.

Expand the Tags panel.

Click the Custom, Geo, or Device tab.

Select a tag name from the list and existing tag values. Click Add new tag values to create new tag values.

Click Add Tag.

Note: If you select multiple tag values for one tag, the flight is served if any of the tag values match. If you select multiple tags, every tag and at least one value from each tag has to match in order for the flight to serve.

Expand the Action Policies panel.

Action policies are used as event markers. They are typically used to determine whether a visitor goes to a certain page after seeing or clicking on an ad.

Custom action tracking enables you to create and track custom actions (for example, tracking whether a website visitor has viewed half of a video) and requires you to complete the Action Policies section. However, standard action tracking requires only a value for Cost Per Action in the Goals and Revenue section of the Edit Flight page.

To add an action policy, do the following:

In the Action list, select a custom action that you want to be tracked.

In the Track Post Impressions Period field, enter a time value such as 6 hours to specify how long to wait for a visitor to trigger the action after receiving this flight. The action will not be counted for a visitor who triggers the action beacon after the specified time period has elapsed.

In the Track Post Clicks Period field, enter a time value such as 6 hours to specify how long a visitor has to trigger the action after having clicked a creative from this flight. The action will not be counted for a visitor who triggers the action beacon after the specified time period has elapsed.
In the Revenue $ field, specify the amount charged for each custom action.

If you want a click action to supersede an impression, select Allow Click to Trump Impression.

Click + Add Policy.

32 Expand the Labels panel. Labels provide a way to add custom fields and values to a flight. These custom fields are available through the API and BI reporting.

- To add a new label, click + Add New Label and enter a name and display name. Then click Add Label.
- To add a value to a label, click + Add Label Value, begin entering the label name, and select it from the drop-down list. Enter a value.

Note: Use wildcard characters to refine the possible values. Use % to specify a wildcard of any length, _ to specify a wildcard of a single character, or ^<keyword> to search for the keyword at the beginning of the string.

33 Expand the Creative panel. All creatives belonging to the advertiser set for the flight are listed.

Creatives are the actual media and content objects that are delivered to the page. After a creative is added to a flight, that relationship is called a flight creative. The same creative can be added only once to the same flight.

- To select existing creatives for the flight, select the creatives from the Available Creative panel and then click + Add Selected Creative.

(Optional) You can filter the creatives using the following fields: Name like with a portion of the creative name, Creative Format, Size, or Date added after for creatives that were created after the specified date.

- To add a new creative to the flight, click + Add New Creative from the Available Creative panel, and then enter the required information in the fields and make the required selections. For more information, see “Add a Creative” on page 69. The creatives that you add to the flight are listed in the Flight Creative table and are assigned a flight creative ID (FCID) that is unique to the flight.

You can preview a creative as soon as you add it. In addition, you can preview a flight for two weeks after it expires. To preview an added creative, do the following:

- Select the check box for the flight creative and click Preview. The Live Preview Flight Creative dialog box appears.

- Enter a URL to evaluate any ad calls on the page to see which ones this flight could serve to. If an ad call matches, the page is rendered with this flight creative showing where the matching ad call is.

- Click Live Preview. Advertisers can use the preview to provide screen shots of the ad “live” on the page to their clients. Click Close when the preview is finished.

Note: By default, the live preview uses the creative's size as the only targeting parameter from the ad calls on the page. If the ad calls on a page do not contain a size value, then the creative is displayed in each of the ad call positions on the page. Contact SAS Technical Support to
configure the PreviewHonorsTargeting option that instructs SAS 360 Match to use all the targeting parameters in the ad call on the page.

- To edit an added flight creative, click for the creative.

The Tag qualifier field determines the tags that are used to evaluate the creative to be served.

Note: To edit multiple creatives, select the creatives and click the Edit button. Fill in the fields that you want to change for the creatives that are selected. Empty fields will not be affected. Check Clear Start Date or Clear End Date to delete the start or end dates for the creatives that are selected.

Click Save Changes after you have made your changes.

- To view the passback URL for an added creative, click for the creative.

For more information, see “About Passback URLs” on page 37.

Note: The displayed URL includes the targeting for only the ad server domain, the HSERVER tag, and the /saspb/fcid={fcid value} string. The URL does not include the targeting for the flight.

34 To save the flight, click either Save Flight, click the down arrow and select Update Flight & Check Inventory, Update Flight & Add Another, Update Flight & Copy, or Update Flight & Make Many Copies.

35 You can copy and send tag information for the flight by clicking Export Tags. A pop-up window appears with both HSERVER and JSERVER tags to enable the trafficking of IA campaigns or flights in other ad-serving systems. Click Copy to select and copy the tags.

About Passback URLs

Passback behavior is triggered by a network redirecting to SAS 360 Match with a tag that includes SASPB and the flight creative ID, or FCID, of the original ad served (for example, .../hserver/SASPB/FCID=1234). If the FCID is absent, invalid, or exists for an ad that is not in the visitor’s recent queue, then a default ad is served, and no true passback is possible.

The SASPB/FCID passback tags that are sent by the network are ideally supplied by a format template that forms them in response to the original ad served (if the network is “cooperative”). Otherwise, the tags must be hardcoded in the trafficking of SAS 360 Match passbacks in the network itself, usually by size.

Assuming that the passback FCID is for a valid ad recently served to the visitor, its associated path information, query string, and blacklisted advertisers are resurrected for the passback ad selection. The ad’s advertiser is added to the blacklisted advertisers for this ad selection only. Ad selection starts at the top of the queue and blocks selecting any flight associated with the blacklisted advertisers. Passback requests can express additional or even overriding values for tags.
If the same FCID is passed back multiple times in a short time span, each passback is likely to resurrect the same set of tags for the passback ad because only the most recent pathinfo and other information is retained. This is expected to occur infrequently, and only when a page has multiple ads of the same size. In such cases, the ad tags are not likely to be very different. If this becomes an issue, prudent use of frequency capping at the creative level can mitigate its effect.

When serving an ad in response to a passback, the impression count for the original ad selection is decremented (that is, uncounted), using its timestamp, tags and other information, unless it was not in the visitor’s queue. Frequency capping is ignored. No attempt is made to credit a capped creative-flight pair when this creative is uncounted. The ad served in response to a passback is counted normally, using its timestamp and the original ad’s tags. The passback itself is not counted. That is, there is currently no separate counting of passbacks that easily enables the reporting of fill rate. During unique visitor (UV) analysis of sample data, no attempt is made to reconcile passbacks with their original flights. Therefore, UV results for a flight includes all visitors who were served that flight, regardless whether all serves of that flight were passed back.
Managing Flights

About Flights

A flight contains the detailed instructions, such as targeting options, and the creative that a campaign should deliver. A campaign must contain at least one flight, but it can contain many flights, depending on the advertiser’s instructions. Flights can serve only within the date ranges applied at the campaign. You can copy and send tag information for flights.

View a Flight

1. On the top navigation bar, click the Traffic tab.
2. Click the Flights subtab. All flights currently in your system are listed.
3. Select the flight name and click . The flight name page appears. You can edit the flight by clicking beside the flight name or view the history by clicking View History.
4  (Optional) Expand the **Filtering** panel to refine the following criteria for the list of flights:

- Enter a portion of the flight name in the **Name like** field.
- Set the **Status** of the flight.
- Select a **Tier** from the drop-down list.
- Set a **Start by** date for the flight.
- Set an **End by** date for the flight.
- Choose a start date and an end date for the **Active Between** dates.
- Search for an **Advertiser**.

**Note:** Enter the first few characters in the name to see the list of advertisers.

- Search for an **Campaign**.

**Note:** Enter the first few characters in the name to see the list of campaigns.

- Enter a portion of the label name in the **Label like** field.
- Select the **Salesperson** from the drop-down list.
- Select the **Trafficker** from the drop-down list.
- Click **Filter**.

5  You can view the following details for a flight:

- To view the targeting details for a flight, click ![icon](image) in the row for a flight.
- To view a read-only version for a flight, click ![icon](image) in the row for a flight.
- To edit a flight, click ![icon](image) in the row for a flight. You can make changes to the flight in the Edit **flight name** page that appears. In the Edit window, click **View History** to display an annotated history of changes to a flight.

When you are in the edit flight window, you can use the drop-down menu above the **Save Flight** menu to view the other flights that are in the same campaign.

- To view the on-schedule percentage for a flight, click the on-schedule percentage in the **OSP** column for the flight. This displays to display a number of statistics about the flight, including goals, revenue, and CTR for impressions, views, clicks, and actions (for example, less than or equal to 79.0% is red, less than or equal to 89.0% is yellow, less than or equal to 100.0% is green, and greater than 100.0% is blue).
Copy a Flight

Note: You can create an original flight only in a campaign. For more information, see “Add a Flight to a Campaign” on page 24.

1. On the top navigation bar, click the Traffic tab.
2. Click the Flights subtab. All flights currently in your system are listed.
3. In the row for a flight, click . The Edit flight name page appears.
4. If you are copying a flight with a start date that has already occurred, specify a new date in the Save & Copy window.
5. Click Make Copy.

Edit a Flight

1. On the top navigation bar, click the Traffic tab.
2. Click the Flights subtab. Flights currently in your system are listed. If you are returning to the Flights tab after a search filter has been applied, only the filtered list of flights will be displayed.
3. There are two ways to edit a flight.
   - To edit a specific flight:
     - Click on the name of a flight or click . The Edit flight name page appears.
     - Refer to “Add a Flight to a Campaign” on page 24 for information about editing a flight.

   Note:
   If a flight does not have any creatives associated with it, the Reservation Size drop-down list appears. Select a size value from the list to enable inventory projections to take the flight into account when calculating the forecast.

   - Click Save Flight or click the down arrow and select Update Flight & Check Inventory, Update Flight & Add Another, Update Flight & Copy, or Update Flight & Make Many Copies.
You can copy and send tag information for the flight by clicking **Export Tags**. A pop-up window appears with both HSERVER and JSERVER tags to enable the trafficking of IA campaigns or flights in other ad-serving systems. Click **Copy** to select and copy the tags.

- Edit a flight from the Flights table. You can change the status, tier, start date, and end date by clicking on the items in the row for the flight.

Here are two ways to update tier weights from the Flights table,

- To change the weight of a tier for a single flight, place your mouse pointer on the tier name. In the pop-up window, edit **Tier Weight**. Click **Update Weight** to save your change.

- To change for weight for multiple flights in a tier, place your mouse pointer on the tier name. In the pop-up window, click **Edit All tier name Weights** to list the flights in the tier. Edit the weight of the flights in the tier. Select **Change Flight Weight** to save your changes.

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**Edit Multiple Flights**

You can edit one or more flight parameters for multiple flights simultaneously.

**CAUTION**

Be extremely careful when selecting flights to edit as there can be serious negative consequences for flights that are selected but are not intended to be edited. Changes cannot be undone.

1. On the top navigation bar, click the **Traffic** tab.
2. Click the **Flights** subtab. All flights currently in your system are listed.
3. To edit all flights, select the check box in the top row. To select individual flights to edit, click the check box for one or more flights in the first column.
4. Click **Multi Edit**.
5. Double-click the label for each field that you would like to edit.

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Note: You can modify only the **Start date**, **End date**, **Tier**, **Type**, and **Top priority** fields in the Update Selected Flights window.

You can also modify the beacon count setting for flights with the **Beacon count** or **Disable beacon count** check boxes. If your global beacon count setting is turned off, you will see the **Beacon count** check box. If your global beacon count setting is on, you will see the **Disable beacon count** check box. By default, this global setting is turned off. Contact SAS Technical Support to turn on the global beacon count setting.

6. Refer to "Add a Flight to a Campaign" on page 24 for information about editing a flight.
Note: From the table on the Flights page, you can update the start date and end date by clicking on the dates in the row for the flight. You can also click the tier name in the row for the flight to change tiers or to update the weight for the tier.

7 Click Update.

Delete a Flight

1 On the top navigation bar, click the Traffic tab.
2 Click the Flights subtab. All flights currently in your system are listed.
3 In the row for a flight that you want to delete, click and then click OK.
About Tiers

Tiers are important elements of SAS 360 Match system’s optimization features. You can use tiers to specify how to deliver ads to meet your business goals and to ensure that campaigns are delivered in the way you want. Multiple tiers can ensure that different types of inventory are evaluated appropriately. In addition, you can use some tier settings to define available future inventory.
Prioritizing Tiers

Tiers enable you to designate a hierarchy of flights. The prioritization method of a tier enables you to select what criteria should be used when the engine calculates the priority of flights in a tier. The priority is used to order the flights in a tier so that the engine evaluates them in a certain order. Tiers can be prioritized by Schedule, Click Rate, Action Rate, CPM, eCPM, Weighted, Cost Per Second, Share Of Voice, or Broad Share of Voice. You might consider naming tiers such that your top tiers are easily recognizable. Note that when tiers are created they do not have flights in them. You design the tier structure around the type of flights that you want to put in them. Top tiers are usually schedule-based and more lucrative. You can also have tiers with no flights in them.

Schedule Prioritization Method

Schedule-based tiers are the most common. Scheduling attempts to meet the goals of a flight on the end date specified. If a flight is not on track to achieve this, it is behind schedule and the engine automatically adjusts the priority so that it has a chance to receive more impressions. Conversely, if the flight is serving (or has served) more than it needs to, it is considered ahead of schedule. If a flight does not have a goal, or does not have an end date, a schedule priority cannot be calculated. In this case, the flight is treated as being on schedule, and any flights that are even slightly behind schedule are evaluated first.

Click Rate Prioritization Method

The Click Rate prioritization method orders flights by their calculated click-through rate (CTR). Click-through rate is determined by comparing the number of impressions versus the number of clicks recorded. A higher ratio of clicks to impressions is considered better performing. Flights with a higher CTR are higher priority and are evaluated to serve before flights with a lower CTR. No clicks are recorded for newly created flights, so the CTR and where it is placed in the tier relative to other flights cannot be calculated. To compensate for this, a grace period and priority are set to enable the flight to serve so that the performance of the flight can be established. The grace period priority is used to determine the position of newly created flights in the ad queue relative to established, non-grace period flights. These are set on the Edit Tier window when the Click Rate prioritization method is selected. In the diagram below, new flights are placed above 80% (0.8) of other flights in the tier for seven days. After this time period has elapsed, the CTR and tier position is calculated as normal. It is recommended to set the grace period length long enough so that a baseline CTR performance can be calculated. The grace period priority is typically set around 0.8 or 0.9 to ensure that the flight receives some traffic, but not too high so that it does not "steal" too many impressions from established flights.
Action Rate Prioritization Method

The Action Rate prioritization method orders flights by their calculated action rate. Action rate is determined by comparing the number of actions versus the number of impressions recorded. Action rate prioritization follows the same principles as click rate prioritization regarding grace period and priority calculation.

CPM Prioritization Method

The Cost Per Thousand (CPM) rate is the monetary rate charged per x number of impressions, clicks, or actions. These rates are specified in the Edit Flight window. For more information, see “Edit a Flight” on page 41. The Cost Per column sets the CPM rate for every 1,000 impressions and for every single click or action. When the CPM prioritization rate is set for a tier, the higher the total CPM rate (impressions, clicks, and actions), the higher priority the flight is considered. This calculation does not depend on the performance of the flight. CPM rate is a static calculation that is determined entirely from the value in the Cost Per field for the flight.

eCPM Prioritization Method

The effective Cost Per Thousand (eCPM) is a prioritization method that is used to determine the best performing flights based on the current number of impressions, clicks, actions, and the respective CPM rates for each. A flight that generates the same overall revenue as another using only half the impressions is going to be considered a better performing flight and thus is given higher priority. CPM rates are set in the Edit Flight window. Because this prioritization method depends on the performance of flights, a grace period must be set for new flights.

Weighted Prioritization Method

The Weighted prioritization method enables you to weight flights by specifying a ratio to determine the order of evaluation. Once this method is selected, all flights in the tier are assigned an equal weight, which then can be altered. The weight can be edited for a flight in the Edit Flight window. For more information, see “Edit a Flight” on page 41. All flight weights can be viewed and edited by first navigating to the Flights tab in the Traffic tab, and then by placing the mouse pointer over a tier.
name that uses the Weighted prioritization method. Click **Edit All Weights**. Here, flight weights can be set, and a calculated percentage is shown next to the weight. Note that targeting can affect the performance of weights. For example, if a flight is weighted at 10% in the tier, but is the only flight targeted to a specific site in that tier, then it effectively serves 100% of the time there. A Weighted tier disregards the Recent Ad Queue (RAQ) for visitors so that the **Serve Soft Match at Tier End** option is effectively enabled even if not selected as a tier option. A flight in the tier can continue to serve repeatedly to a visitor (as long as any frequency caps have not been reached). Delivery pacing for a flight with an end date and impression goal is ignored when placed in a Weighted tier.

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**Cost per Second Prioritization Method**

The Cost Per Second (CPS) prioritization method commonly applies to video ad serving where the revenue and rate associated with a creative can be calculated by the system to a CPS. Flights assigned to a tier that is using the CPS prioritization method then compete and are prioritized based on their CPS value, highest to lowest.

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**Share of Voice Prioritization Method**

When the Share Of Voice (SOV) prioritization method is used, the percentage assigned to each flight indicates the percentage of overall matching traffic that the flight should serve. When a flight is in an SOV tier, the flight setup or edit screen displays a field in which you must assign the percentage. For example, if the highest tier in the system was using SOV and a flight was set to 20% (and the flight had a 728 x 90 creative and no targeting), then it would receive 20% of all 728 x 90 traffic. If the tier was at the bottom, then that flight would receive 20% of the 728 x 90 traffic that made it down to that tier. In a Weighted tier, the tier receives 100% of the traffic regardless and the percentages control how often the flights serve within that tier. With SOV, the percentages control how much overall matching traffic is served by that flight. Overall matching traffic indicates the traffic that matches the targeting for the flight. In an SOV tier, the flight is selected based on its SOV percentage, but if its targeting does not match the ad request's targeting, the ad server moves down to the next tier. This is unlike a Weighted tier, in which the ad server remains in the tier in order to find another matching flight. An SOV tier disregards the RAQ for visitors so that the **Serve Soft Match at Tier End** option is effectively enabled even if not selected as a tier option. A flight in the tier can continue to serve repeatedly to a visitor (as long as any frequency caps have not been reached).

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**Broad Share of Voice Prioritization Method**

The Broad Share Of Voice (BSOV) prioritization method is similar to the SOV prioritization method. However, when the BSOV prioritization method is used, flights within the tier are grouped and percentages are set according to their targeting signatures. For example, if Flight A is targeted to a Site called *Home*, Flight B is targeted to a Site called *Home*, and Flight C is targeted to a Site called *Sports*,...
Add a Tier 49

Flights A and B would have the same targeting signature, and the percentages set
for these flights would apply to that targeting group. Consequently, Flight A might be
weighted 50% and flight B might be weighted 50%. Because Flight C is targeted
differently, it might be weighted 100%. The same setup in a regular SOV tier would
require multiple tiers, whereas BSOV allows one tier with many groupings,
eliminating the need for additional tiers. To see the division of targeting signatures
and the flights that belong to each, edit the BSOV tier and click Flights. The Voice
column displays the specific targeting signature, and the Voice Total column
displays the total SOV that the flights occupy.

Broad Weighted Prioritization Method
Broad Weighted is a combination of the Weighted and Broad Share Of Voice
methods. It works like a weighted tier in that the flight weights stipulate what ratio a
flight serves in relation to other flights, and in this case, flights with the same
targeting signature. This is in contrast to Share Of Voice that specifies the
percentage of all ad traffic that is evaluated for that tier. Note that a Broad Weighted
tier disregards the Recent Ad Queue (RAQ) for visitors, so the Serve Soft Match at
Tier End option is effectively enabled even if not selected as a tier option. A flight in
the tier can continue to serve repeatedly to a visitor, as long as any frequency caps
have not been reached. Delivery pacing for a flight with an end date and impression
goal is ignored when placed in a Weighted tier.

Add a Tier
1 On the top navigation bar, click the Traffic tab.
2 Click the Tiers subtab. All tiers currently in your system are listed.
3

Click + Add New Tier. The Add New Tier page appears.

4

Enter information in the Name field.
Note: You can enter only alphanumeric characters (a–z, A–Z, 0–9), special
characters (~@#$%^&*-+(){}[]|/<>"=']), spaces, underscores, and punctuation
marks (!.,?;:).

5

Select Active, Pre-emptible, Biddable, or Private Marketplace.
n Select Active to enable the tier and make flights eligible for ad serving.
n Select Pre-emptible to allow the inventory allocated for this tier to be

available when calculating the available inventory for a sales proposal. The
flights in this tier are not to consume inventory when calculating the inventory.
Tiers whose flights are catch-all flights such as House flights are typically
marked Pre-emptible.
n Select Biddable to allow bidding if the winning flight is in that tier.


☐ Set a value for **Bid floor**. The behavior of floor prices that are sent to SSPs are controlled by the following options:

- Select **Flight eCPM** to send the eCPM of the flight that is selected to compete against the placement as the floor price.
- Select **Placement default** to send the floor price that is specified for the placement.
- Select **Higher of** to send the higher value of either the flight eCPM or the placement.
- Select **Lower of** to send the lower value of either the flight eCPM or the placement.

The default behaviors for floor prices are detailed in the “Bidding” section in the **Platform Integration Guide**.

☐ Set a value between 0 and 1 for the **Bid threshold priority** for the tier. This value determines whether bidding happens for an impression.

- This is the minimum priority that a competing flight from the tier must have for bidding to occur. When a competing flight has a priority equal to or greater than this threshold, bidding occurs. When the flight’s priority is below the threshold, bidding does not happen and the flight serves. The default value is 0, which allows bidding with no consideration of the flight’s priority. If the threshold is 1.0, bidding does not happen.

- Select **Private Marketplace** for Rubicon integrations. Use the **Rubicon Deal Prioritization** options to fine-tune how each type of private marketplace deal competes. Private marketplace deals from Rubicon offer the following controls: **Private Auction Deals, Preferred Deals, Private Deals**, and **Guaranteed Deals**.

Assign one of these behaviors to each deal type:

- Select **Compete w/all demand** if the deal is not considered any differently and competes normally with real-time bids (RTBs). This is the default behavior.
- Select **Trump RTB demand** if the deal supersedes non-PMP (RTB) bids.
- Select **Trump all demand** if the deal supersedes all other bid types and flight eCPMs.

**Note:**

You must enable **Biddable** before you can configure the **Private Marketplace** options.

For more information about configuring the deal types in **Rubicon Deal Prioritization for Private Marketplace**, see the section on “Configuring Floor Prices and Tiers” in the **Platform Integration Guide**.

---

6 In the **Target** field, enter the first few letters of the target’s name and then select the target from the list.

**Note:** Enter % if you want to display the full list of targets.
In the Prioritization method list, select one of the following options: Schedule, Click Rate, Action Rate, CPM, eCPM, Weighted, Cost Per Second, Share of Voice, Broad Share of Voice, or Broad Weighted.

If you select Click Rate, Action Rate, or eCPM, then you must also enter a value for the number of days in the Grace period field and use the slider to select a value for the Grace period priority.

The grace period applies to the initial placement of a flight in a tier. Flights that have been in the tier longer than the grace period are served according to the ad serving algorithm selected for the tier. The schedule and weighted ad serving algorithms do not require a grace period. Flights can be added to the tier on-the-fly so that flights using the grace period can co-exist with flights using the tier’s selected prioritization method.

The grace period priority determines the relative position of flights that are still in their grace period in the tier. Selecting 1 for the Grace period priority places the flight ahead of all others that are not in their grace period, so this value yields the greatest opportunity. Selecting 0 places the flight after all other flights in the tier. When the grace period priority is 0.5, the flights are positioned in the middle of the flights in the tier.

After the grace period expires, the flight is served using the specified ad serving method.

Select one or more of the following options:

- **Serve Soft Match at Tier End**

  This flag is a list of recently seen ads for each visitor. When this option is selected, SAS 360 Match stays in the tier to serve previously served ads if there are no previously unserved ads that match the targeting. When this option is set, the ad server engine stays in the tier until the ad request targeting does not match or flights in the tier are ahead of schedule and cannot serve again. This option works well for tiers with the top-value flights because it gives them more opportunities to serve before SAS 360 Match drops to the next tier.

  **Note:** This option changes how flights in a visitor’s recently seen queue are evaluated so that the flights have more opportunities to serve.

- Over the life of the flight, the ad server looks at progressively fewer recently seen ads in the visitor's queue if the flight is getting further behind schedule, thus allowing more opportunities for the flight to serve because it is not in the visitor's recently seen queue.

- Select **Top priority** in a flight to ignore a visitor's queue of recently seen ads when the flight is evaluated. This option provides more opportunities for the flight to serve.

- **Eliminate Duplicate Flights**

- **Eliminate Duplicate Advertisers**

  **Note:** When you select Eliminate Duplicate Flights or Eliminate Duplicate Advertisers, SAS 360 Match does not deliver the same flight or advertiser more than once in a series of ad calls with the same view ID values. Setting the view ID values differently in the ad calls on the page would override these
settings because the different view ID would indicate a new page and SAS 360 Match could serve the advertiser or flight again.

The Eliminate Duplicate Flights and Eliminate Duplicate Advertisers settings are global for the tier. You cannot disable the settings for specific flights or advertisers in the tier. A companion ad policy enabled on a flight overrides the Eliminate Duplicate Flights setting or the Eliminate Duplicate Advertisers setting in a tier.

9 (Optional) In the Teams field, list the teams that can assign the tier to flights.

Note: This option is available only when team restrictions are enabled for users. In Admin ⇒ Users, select Team restricted for each user that you want to restrict to only the tiers that are assigned to their team. Users with this option enabled can select only the tiers that are assigned to their teams when creating a flight.

10 Click Add Tier.

---

**View a Tier**

1 On the top navigation bar, click the Traffic tab.

2 Click the Tiers subtab. All tiers currently in your system are listed.

3 In the row for a tier, click the tier name or click . The Tier tier-name page appears.

---

**Edit a Tier**

1 On the top navigation bar, click the Traffic tab.

2 Click the Tiers subtab. All tiers currently in your system are listed.

3 In the row for a tier, click the tier name or click . The Edit tier-name tier page appears.

4 Enter information in the Name field.

Note: You can enter only alphanumerics (a–z, A–Z, 0–9), special characters (~@#$%^&*(){}[]<>"'), spaces, underscores, and punctuation marks (!.,?,:).

5 Select Active, Pre-emptible, Biddable, or Private Marketplace.
Select **Active** to enable the tier and make flights eligible for ad serving.

Select **Pre-emptible** to allow the inventory allocated for this tier to be available when calculating the available inventory for a sales proposal. The flights in this tier are not to consume inventory when calculating the inventory. Tiers whose flights are catch-all flights such as House flights are typically marked **Pre-emptible**.

Select **Biddable** to allow bidding if the winning flight is in that tier.

- Set a value for **Bid floor**. The behavior of floor prices that are sent to SSPs are controlled by the following options:
  - Select **Flight eCPM** to send the eCPM of the flight that is selected to compete against the placement as the floor price.
  - Select **Placement default** to send the floor price that is specified for the placement.
  - Select **Higher of** to send the higher value of either the flight eCPM or the placement.
  - Select **Lower of** to send the lower value of either the flight eCPM or the placement.

  The default behaviors for floor prices are detailed in the “Bidding” section in the **Platform Integration Guide**.

- Set a value between 0 and 1 for the **Bid threshold priority** for the tier. This value determines whether bidding happens for an impression.

  This is the minimum priority that a competing flight from the tier must have for bidding to occur. When a competing flight has a priority equal to or greater than this threshold, bidding occurs. When the flight's priority is below the threshold, bidding does not happen and the flight serves. The default value is 0, which allows bidding with no consideration of the flight's priority. If the threshold is 1.0, bidding does not happen.

Select **Private Marketplace** for Rubicon integrations. Use the **Rubicon Deal Prioritization** options to fine-tune how each type of private marketplace deal competes. Private marketplace deals from Rubicon offer the following controls: **Private Auction Deals**, **Preferred Deals**, **Private Deals**, and **Guaranteed Deals**.

Assign one of these behaviors to each deal type:

- Select **Compete w/all demand** if the deal is not considered any differently and competes normally with real-time bids (RTBs). This is the default behavior.
- Select **Trump RTB demand** if the deal supersedes non-PMP (RTB) bids.
- Select **Trump all demand** if the deal supersedes all other bid types and flight eCPMs.

---

**Note:**

You must enable **Biddable** before you can configure the **Private Marketplace** options.

For more information about configuring the deal types in **Rubicon Deal Prioritization** for **Private Marketplace**, see the section on “Configuring Floor Prices and Tiers” in the **Platform Integration Guide**.
6 In the **Target** field, enter the first few letters of the target’s name and then select the target from the list.

---

**Note:** Enter % if you want to display the full list of targets.

---

7 In the **Prioritization method** list, select one of the following options: **Schedule**, **Click Rate**, **Action Rate**, **CPM**, **eCPM**, **Weighted**, **Cost Per Second**, **Share of Voice**, **Broad Share of Voice**, or **Broad Weighted**.

If you select **Click Rate**, **Action Rate**, or **eCPM**, then you must also enter a value for the number of days in the **Grace period** field and use the slider to select a value for the **Grace period priority**.

The grace period applies to the initial placement of a flight in a tier. Flights that have been in the tier longer than the grace period are served according to the ad serving algorithm selected for the tier. The schedule and weighted ad serving algorithms do not require a grace period. Flights can be added to the tier on-the-fly so that flights using the grace period can co-exist with flights using the tier’s selected prioritization method.

The grace period priority determines the relative position of flights that are still in their grace period in the tier. Selecting 1 for the **Grace period priority** places the flight ahead of all others that are not in their grace period, so this value yields the greatest opportunity. Selecting 0 places the flight after all other flights in the tier. When the grace period priority is 0.5, the flights are positioned in the middle of the flights in the tier.

After the grace period expires, the flight is served using the specified ad serving method.

8 Select one or more of the following options:

- **Serve Soft Match at Tier End**

  This flag is a list of recently seen ads for each visitor. When this option is selected, SAS 360 Match stays in the tier to serve previously served ads if there are no previously unserved ads that match the targeting. When this option is set, the ad server engine stays in the tier until the ad request targeting does not match or flights in the tier are ahead of schedule and cannot serve again. This option works well for tiers with the top-value flights because it gives them more opportunities to serve before SAS 360 Match drops to the next tier.

  **Note:** This option changes how flights in a visitor’s recently seen queue are evaluated so that the flights have more opportunities to serve.

- Over the life of the flight, the ad server looks at progressively fewer recently seen ads in the visitor’s queue if the flight is getting further behind schedule, thus allowing more opportunities for the flight to serve because it is not in the visitor’s recently seen queue.

- Select **Top priority** in a flight to ignore a visitor’s queue of recently seen ads when the flight is evaluated. This option provides more opportunities for the flight to serve.

- **Eliminate Duplicate Flights**

- **Eliminate Duplicate Advertisers**
Note: When you select Eliminate Duplicate Flights or Eliminate Duplicate Advertisers, SAS 360 Match does not deliver the same flight or advertiser more than once in a series of ad calls with the same view ID values. Setting the view ID values differently in the ad calls on the page would override these settings because the different view ID would indicate a new page and SAS 360 Match could serve the advertiser or flight again.

The Eliminate Duplicate Flights and Eliminate Duplicate Advertisers settings are global for the tier. You cannot disable the settings for specific flights or advertisers in the tier. A companion ad policy enabled on a flight overrides the Eliminate Duplicate Flights setting or the Eliminate Duplicate Advertisers setting in a tier.

9 To update the tier weight when there are multiple flights associated with a weighted tier, click Flights, change the values in the Tier Weights column, and then click Change Flight Weight.

10 (Optional) In the Teams field, list the teams that can assign the tier to flights.

(continued)

Rank Tiers

When selecting an advertisement, tiers are evaluated in the order in which they are ranked. You can arrange the tiers in the order in which you want them to be evaluated.

1 On the top navigation bar, click the Traffic tab.

2 Click the Tiers subtab. All tiers currently in your system are listed.

3 Click Rank Tiers.

4 To change the rank of a tier, select it and then move it up or down in the list.

5 Click Save Changes.
Delete a Tier

1. On the top navigation bar, click the Traffic tab.

2. Click the Tiers subtab. All tiers currently in your system are listed.

3. In the row for a flight, click \( \text{ } \) and then click OK.

Note: A tier containing flights cannot be deleted.
Managing Custom Actions

About Custom Actions

Custom Actions are events other than the standard metrics of impressions, clicks, and actions that you want to track. Usually, actions are used to attribute an impression or click to an event. For example, if a visitor clicks on an ad, and then purchases the product that was being advertised, this sequence of events can be counted as an action. All advertisers start with a default set of custom actions.

Add a Custom Action

1. On the top navigation bar, click the Traffic tab.
2. Click the Custom Actions subtab.
3. Click + Add New Action.
4. Enter information in the Name field.

Note: You can enter only alphanumerical characters (a–z, A–Z, 0–9), periods, underscores, and hyphens.
5 If you want to specify advertisers that you want the action applied to, deselect For all advertisers and then enter information in the Advertisers field.

6 Click Add Action.

---

**Edit a Custom Action**

1 On the top navigation bar, click the Traffic tab.

2 Click the Custom Actions subtab.

3 Click the custom action name or click in the row for the custom action. The Edit custom action name Custom Action page appears.

4 Enter information in the Name field.

Note: You can enter only letters, numbers, hyphens, dots, and underscores.

5 If you want to specify advertisers that you want the action applied to, deselect For all advertisers and then enter information in the Advertisers field.

6 Click Update.

---

**Delete a Custom Action**

1 On the top navigation bar, click the Traffic tab.

2 Click the Custom Actions subtab.

3 In the row for a custom action, click and then click OK.
Debugging Ads

About Debugging Ads
Requesting an ad debug enables you to troubleshoot flight delivery issues that might be the result of targeting or flight policies such as frequency capping. The placement ID and name are displayed when evaluating network integration placements.

Debugging an Ad Request

Note: By default, the user interface for the Debug Ad Request provides access to Personally Identifiable Information, or PII. To restrict access to PII, contact SAS Technical Support.

1. On the top navigation bar, click the Traffic tab.
2. Click the Debug Ad Request subtab.
3. Enter the targeting parameters in the Path Info field. Separate key=value pairs with a forward slash (/) or an ampersand (&).

Note: Here are some useful tips when you are building the targeting string:
To find geotargeting tags that must to be included, edit the flight, click View Targeting, and look for any geo tags and values in the targeting. To troubleshoot geotargeting issues, you need to explicitly declare the geotargeting values. For more information about valid geotargeting tag names, see “About Predefined Tokens” on page 143.

The available ad server methods are iserver, hserver, jserver, or bserver. The bserver method allows multiple ad requests with global targeting for all requests and per-request targeting.

The view ID is required in debug ad request for flights with a companion or roadblock policy enabled. This policy provides a method of serving multiple creatives from the same flight to the same page at the same time. For more information, see the Companion type option in “Add a Flight to a Campaign” on page 24.

You can customize the Cookie, User Agent, and Referrer values if needed. If you do not enter a mid= cookie value, select Run twice because the first execution of the request is to get a mid= cookie. For debugging purposes, you can enter any alphanumeric string as a valid mid cookie value (for example, 0001245678A).

From the Trace list, select the debugging option:

- **Normal Ad Selection** returns session information as well as the reasons a flight or creative is selected or not selected.
- **All Ad Selection** returns information and all flights or creatives that match the targeting.

Click Run.

The information in the Cookie field might be updated and a return code and results appear at the bottom of the page. Each placement is listed as it is evaluated.

---

**Understanding Debug Messages**

For **Normal Ad Selection**, the actual selection is shown at the bottom of the evaluation, preceded by >>>>: For **All Ad Selection**, all matching flights are prefaced with >>>>:.

Here are some common ad debug messages and steps to troubleshoot the problems. If you need additional assistance to fix the issues, contact SAS Technical Support.

---

**General Messages**

*Creative filter doesn't match.* The creative filter does not match the creative filter in the ad call. In the flight, select **View Targeting**. Compare the targeting
values listed against the ad call to find the mismatch. Resolve the mismatch by changing either the ad call or the creative.

Creative size doesn't match. The size that is specified for the creative does not match the size that is specified in the ad call. View the creative confirm that its size matches what is in the ad call.

Creative violates its exposure policy. A creative-level frequency cap is preventing the ad from displaying. Clear your cookies or adjust your frequency cap settings to determine whether the ad can deliver.

Flight cannot serve sequential creatives to an anonymous visitor. The flight contains sequential creatives that must be seen in a specific sequence, which requires the browser to accept cookies. Confirm that your browser accepts cookies.

Flight has already been shown on this page. View the tier for the flight and determine whether Eliminate Duplicate Advertisers is enabled. If selected, notify client this is causing the issue. When this option is selected, it prevents an advertiser from showing its ads more than once on a page. You can clear the option if you want an advertiser to show ads multiple times on a page.

Flight has expired. The flight cannot serve because it has reached its end date or goal.

Flight has not yet started. The flight cannot serve because it has not reached its start date or time.

Flight has met today's daily revenue cap. The flight cannot serve any more impressions. Flights with a daily revenue cap serve impressions until the calculated revenue cap is reached. Edit the flight and check the Goal and CPM fields. For more information, see the Daily Revenue Cap option in "Add a Flight to a Campaign" on page 24.

Flight has served too recently. The Recent Ad Queue (RAQ) prevents flights from serving ads that have been served too recently in order to encourage rotation. Enable Serve Soft Match At Tier End in the tier for the flight to disable the RAQ.

For more information about the RAQ, see:
- The Serve Soft Match at Tier End option in "Add a Tier" on page 49.
- Tier prioritization methods in "About Tiers" on page 45
- SAS Note 53325 Ad Selection Logic

Flight is a companion flight, but "no companion" is specifically requested. If you are trying to serve flights that have Companion type enabled, the ad call cannot contain /nocompanion.

Flight is a companion flight, but no pageview id is present. Flights with Companion type enabled require a /viewid=some-value in the ad call. Check the ad call to ensure that it is present. You can incorporate this key=value pair into the ad call. For more information, see the SAS 360 Match Request Application Programming Interface guide.

Flight is a companion flight, but the visitor is anonymous. Flights with Companion type enabled require the browser to accept cookies. Confirm that your browser accepts cookies. For more information, see the Companion type option in "Add a Flight to a Campaign" on page 24.

Flight is a loose companion flight, but companion flight is already engaged on this page. Another companion flight has served to other ad calls using the same view ID. Different companion flights cannot be served to the same page at the same time.
Flight is a loose companion flight, but companion flight X is already engaged on this page. Multiple flights with a specified companion type are attempting to be delivered to the ad call. However, only one companion-based flight can deliver to a page.

Flight is a strict companion flight, but this is not the first ad on the page. Flights that have Companion type set to Strict require certain conditions to be met in order to serve. For more information, see the Companion type option in “Add a Flight to a Campaign” on page 24.

Flight is ahead of schedule. The flight is not serving any impressions because it is ahead of schedule. When a flight is ahead of schedule, it has served too many impressions too quickly. If the flight continues to serve impressions at the same rate, it would meet the impression goal before the end date and time. Check the Flight Status report. Flights are eligible to serve again once their priority drops below 1.0.

Flight is exceeding its serve rate for this interval. The serve rate evens out how impressions are delivered to prevent spikes in the delivery rate. Wait a few minutes and try again.

Flight is for advertiser and has category, but that category has already been shown on this page by advertiser. Categories are assigned on the advertiser and flight levels. Once a flight with a given category has served to a page, no other ad calls on that page can serve flights that are assigned to the same category.

Flight is for advertiser, which has already been shown on this page. View the tier for the flight and determine whether Eliminate Duplicate Advertisers is enabled. When selected, this option prevents an advertiser from showing its ads more than once on a page. You can clear the option if you want an advertiser to show ads multiple times on a page.

Flight is not serving for an unknown reason. Contact SAS Technical Support to assist with troubleshooting this issue.

Flight's product tag restrictions don't match. Edit the flight and select View Targeting. Compare the targeting values listed against the ad call to find the mismatch. Resolve the mismatch by changing either the ad call or the product tags.

Flight's product targets don't match. Edit the flight and select View Targeting. Compare the targeting values listed against the ad call to find the mismatch. Resolve the mismatch by changing either the ad call or the product target.

Flight's tag restrictions don't match. Edit the flight and check the Tags section. Compare the specified tags in the flight against the ad call to find the mismatch. Resolve the mismatch by changing either the ad call or the flight tags.

Flight's targets don't match. Edit the flight, and select View Targeting. Compare the targeting values listed against the ad call to find the mismatch. Resolve the mismatch by changing either the ad call or the flight target.

Flight violates its campaign exposure policy. A campaign-level frequency cap is preventing the ad from displaying. Clear your cookies or adjust your frequency cap settings to determine whether the ad can deliver.

Flight violates its exposure policy. A flight-level frequency cap is preventing the ad from displaying. Clear your cookies or adjust your frequency cap settings to determine whether the ad can deliver.
Schedule is segmented on: SIZE AREA SITE. Some tiers and flights may not be shown. This is a status message and does not indicate any problems. Add /nosegment to your ad call to suppress this message.

Strict companion flight could not serve and is now cancelled on this page. The Companion Type for the flight is set to Strict and requires specific conditions to be met before it can serve. For more information, see the Companion type option in “Add a Flight to a Campaign” on page 24.

The current time is outside the flight’s daily serving window. The flight is set to run only during a specified portion of the day. Edit the flight and check the Daily Window settings.

This is a passback, but the FCID is either invalid or not recently served to the visitor. Either the flight creative ID (FCID) that is passed in on the ad call is invalid or the passback ad call was not received within five seconds of the original ad call.

Tier filter doesn't match. The target that is applied to the tier does not match the targeting on the ad call. Compare the ad call targeting to the tier target to find the mismatch. Edit the tier, get the target name, and then edit the target. Resolve the mismatch by changing either the ad call or the tier target.

Visitor is restricted to session-only exposure policies, and flight's exposure policy X is not session-only. Contact SAS Technical Support if you encounter this message. Access to the visitor’s history is restricted so only flights with a session-based frequency capping policy or flights with no frequency capping can serve to the ad request. The trace also includes a visitor session message that states the value of Persists history is FALSE.

SSP Messages

No placement selected. None of the settings in the placement matched the settings in the ad call. Edit the placement settings to match the ad call.

No valid bid met the floor and private market requirements. The floor price or the private market requirements in the ad call did not match any of the values in the placement.

Placement's size doesn't match. The size settings in the placement do not match the size setting in the ad call. Edit the placement and change the size mapping to include one that is accepted by the ad call.

Targeting doesn't match on: bidder, site, or placement. The ad call’s site is not mapped in the placement. Edit the placement and change the site mapping to include one that is accepted by the ad call.

Unsupported size. The ad call includes a size that is not supported by the placement. Edit the placement and change the size settings to one that is accepted by the ad call.
Managing Labels

About Labels

Labels provide a way of adding custom fields and values to a flight. These custom fields are available through the API and BI reporting.

Add a Label

1. On the top navigation bar, click the Traffic tab.

   Labels provide a way of adding custom fields and values to a flight. These custom fields are available through the API and BI reporting.

2. Click the Labels subtab.

3. Enter a name and a display name. Click Add Label.

Delete a Label

1. On the top navigation bar, click the Traffic tab.
2 Click the **Labels** subtab.
3 In the row for a label, click ![image](image.png) and then click **OK**.
PART 3

Ad Creative

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Managing Creatives

About Creatives

A creative is displayed to a customer as an advertisement. A creative must be assigned to a flight in order to be served by the ad server.

Add a Creative

1. On the top navigation bar, click the Creative tab.
2. Click + Add New Creative.
3. Enter information in the Name field.

Note: You can enter only alphanumeric characters (a–z, A–Z, 0–9), underscores, and hyphens. You cannot use spaces in a creative name.
4 In the **Advertiser** field, enter the first few letters of the advertiser’s name and then select the advertiser from the list. The advertiser that you select is the one that you use when creating the campaign.

**Note:** Enter % if you want to display the full list of advertisers.

5 Enter information in the **Description**, **Notes**, and **User Info** fields. If you are adding a video creative, enter a value for the number of seconds the ad will run in the **Duration** field.

6 Select one or more **Categories**. Category values can be added when editing an advertiser. If a creative with a category is served, no other flight or creative with the same category can serve to the same page view (or VIEWID) for that visitor.

7 In the **Media** panel, select a format based on the type of creative that you are delivering from the **Creative Format** list. For more information, see “About Creative Formats” on page 81.

8 Enter information in the fields that are specific to the selected creative format.

9 Click **Add Creative**. If the upload is successful, a green success bar appears. To view the creative, scroll down the page and then select the creative.

## Edit a Creative

1 On the top navigation bar, click the **Creative** tab.

2 (Optional) Expand the **Filtering** panel to refine the search criteria for the creatives.

3 Click the creative name or click the icon in the row for the creative. The Edit Creative — Creative name page appears.

4 Modify the information in the **Name** field.

**Note:** You can enter only alphanumeric characters (a–z, A–Z, 0–9), underscores, and hyphens. You cannot use spaces in a creative name.

**TIP** You do not have to enter the filename for the creative. Adding more description to the name might make it easier to find. For example, you might want to enter My_Creative_1.
5 In the **Advertiser** field, enter the first few letters of the advertiser’s name and then select the advertiser from the autosearch results. The advertiser that you select is the one that you use when creating the campaign. Enter % if you want to display the full list of advertisers.

---

**Note:** Be careful not to change the advertiser if it has already been assigned to a flight.

6 Enter information in the **Description**, **Notes**, and **User Info** fields. If you are adding a video creative, enter a value for the number of seconds the ad will run in the **Duration** field.

7 In the **Media** panel, select a format from the **Creative Format** list based on the type of creative that you are delivering. For more information, see “About Creative Formats” on page 81.

8 Enter information in the fields that are specific to the selected creative format.

---

**Note:** When editing a custom creative format, use **New Asset** to replace the asset that is specified in the HTML field. Use **View Code** to view or edit the asset.

9 (Optional) In the **Preview** panel, click **Preview Creative** to display the creative.

10 (Optional) In the **Flights** panel, add the creative to an existing flight. For more information, see “Add a Creative to an Existing Flight” on page 71.

11 (Optional) In the **Flight Creative** panel, remove the creative from a flight, or edit a flight. For more information, see “Manage Flight Creatives” on page 72.

12 Click **Update Creative** or click the down arrow and select **Update Creative & Copy** or **Update Creative & Make Many Copies**.

---

### Add a Creative to an Existing Flight

1 On the top navigation bar, click the **Creative** tab.

2 Click the creative name or click ![Creative](image) in the row for the creative.

3 In the **Flights** panel, click on the ![Refresh](image) next to **Available Flights** to update the list of flights.

4 Refine the list of flights by filtering flights using **Flight Name like**, **Campaign Name like**, or **Status** fields.

5 Select a flight from the list.

6 Click **Add Selected Flights**. The flight appears in the Flight Creative table. For more information, see “Manage Flight Creatives” on page 72.
If you want to apply date restrictions or special targeting options to the creative, click the in the row for the flight, enter information in the fields, and then click **Save Changes**.

Click **Update Creative**. A green success bar appears.

To indicate that the flight is now eligible for service, do the following:

a. On the top navigation bar, click the **Traffic** tab.

b. Click the **Flights** subtab.

c. In the row for the flight to which you have added a creative, click on the arrow next to **Missing Creative** in the Status column.

d. Select **Pending**. Within a few moments, the solution identifies the change and moves the campaign into service if it is within the date range that you have specified.

---

**Manage Flight Creatives**

1. Expand the **Creative** panel in the **Edit flight name** window.

2. To add a new flight creative, click + **Add New Creative** from the **Available Creative** panel. For more information, see “Add a Creative” on page 69.

3. To add an existing flight creative, select a flight creative from the **Available Creative** table and click + **Add Selected Creative**. (Optional) You can filter the creatives using the following fields: **Name like** with a portion of the creative name, **Creative Format**, **Size**, or **Date added after** for creatives that were created after the specified date.

4. To edit a flight creative, select a flight creative from the **Flight Creative** table and click . The **Edit Flight Creative** window appears.

   **Note:** To edit multiple flight creatives, click the check box for each flight creative that you want to edit, and then click **Edit**.

5. Make any desired edits, and then click **Save Changes**.

   **Note:** The **Tag qualifier** field determines the tags that are used to evaluate the creative to serve. You can use token references, such as %%TOKENNAME%%, in the tag qualifier. When the ad is selected to serve, the qualifier string is dynamically expanded to include any token references to generate a complete qualifier.

   The tag qualifier value is a key that is used to look up a set of tags to apply while the creative is evaluated. The tag qualifier value can be a literal, such as MYQUALIFIER, or the value can contain token references that expand to produce the final value. For instance, if the qualifier is ABC_%%HOTEL%% and
there is a HOTEL tag that is set to HILTON, then ABC_HILTON is the qualifier value that is used to look up the tag set to apply.

6 To view the passback URL for a flight creative from the Flight Creative table, click in the row for the creative. For more information, see “About Passback URLs” on page 37.

Note: The displayed URL includes the targeting for only the ad server domain, the HSERVER tag, and the /saspb/fcid={fcid value} string. The URL does not include the targeting for the flight.

7 To remove a flight creative from the Flight Creative table, click in the row for the creative, and then click OK.

---

Copy a Creative

1 On the top navigation bar, click the Creative tab.

2 In the row for a creative, click . The Edit Creative creative name page appears.

3 Enter unique information in the Name field, and then make any desired edits and selections.

4 Click Update Creative, or click the arrow and select Update Creative & Copy or Update Creative & Make Many Copies.

---

Delete a Creative

1 On the top navigation bar, click the Creative tab.

2 In the row for a creative, click and then click OK.
Managing Multiple Creatives

About Multiple Creatives

Using the multiple creatives tool, you can create and upload many creatives at once. These creatives can be assets that are already saved, new files that will be uploaded, or media files from a specific URL.

Create Multiple Creatives

1. On the top navigation bar, click the Creative tab.
2. Click the Multiple Creative subtab.
3. In the Advertiser field, enter the first few letters of the advertiser’s name and then select the advertiser from the list. The advertiser that you select is the one that you use when creating the campaign.

   Note: Enter % if you want to display the full list of advertisers.

4. In the Click URL field, enter the URL that you want users to be redirected to when they click on the creatives.
5. From the Creative Format list, select the format of the creative you want to create.
6. From Image File, select URL, Asset, or Upload as the source of the media file.
7 From the Size list, select an ad size.

8 To upload a file, click Choose File, navigate to the creative file, and then click Open.
   The filename for the selected creative appears in the File list, but the file is not uploaded until you click Add Media.

9 In the Alt Text field, enter the alternative text that will be displayed if the image cannot be shown in the user’s browser.

10 For each creative that you would like to add, repeat steps 5–9. Then click Add Media.

11 Click Add Creative. If the upload is successful, a green success bar appears.
Managing Smart Upload

About Smart Upload

The Smart Upload tool provides an automatic and easy way of setting up third-party creatives. With this tool, third-party tags are uploaded to the application, the third party is identified, each creative is detected and parsed, and any formatting or URL tokens needed for the creatives to function correctly are automatically inserted.

Note: You can upload only creatives from DoubleClick (iframe/javascript), Atlas (iframe/javascript), Sizmek (iframe/javascript), Facilitate Digital (javascript), or HTML5 creatives in a ZIP file. Files encoded in UTF-8 with a byte-order mark (BOM) are also supported.

Add a Smart Upload

1. On the top navigation bar, click the Creative tab.
2. Click the Smart Upload subtab.
3. To keep the original filename for the creative, select Preserve names.
4. Enter a name in the Preserved Creative Name field. The name can be a regular expression or a string, and is used to generate the name of each creative from the uploaded file.
Note: To use stored regular expressions or strings for the preserved creative name that you created, click Choose Pattern. Patterns are created and saved on the Name Patterns subtab on the Creative tab. For more information, see Chapter 12, “Managing Name Patterns,” on page 79.

5 Enter information in the Constant Creative Name field, and then select Prepend or Append.

Note: You can enter only letters, numbers, hyphens, and underscores for the creative name.

You use the Constant Creative Name field to control a naming scheme for the creatives identified in the uploaded tag. For each creative, an underscore and a sequence number is added either before or after the constant creative name, depending on whether you select Prepend or Append. For example, if you entered Demo_Creative in the Constant Creative Name field, the constant creative name would become 0_Demo_Creative if you selected Prepend or Demo_Creative_0 if you selected Append.

6 In the Advertiser field, enter the first few letters of the advertiser’s name and then select the advertiser from the autosearch results.

Note: Enter % if you want to display the full list of advertisers.

7 Click Choose File, navigate to the third-party creative file, and then select Open.

Note: Only files encoded in UTF-8 are supported.

8 Click Upload. Each found creative is displayed.

Note: If the tag that you uploaded is not recognized, an error message is displayed indicating either that the third party is not recognized, or that the tag formatting is not recognized. In these cases, you must use the Creative tab to upload the creatives. For more information, see “Add a Creative” on page 69.
About Name Patterns

Name patterns are common regular expressions or strings that are used to generate the name of each uploaded creative. They can be saved, edited, or reused. The Smart Upload tool can use name patterns when it uploads creatives from third-party vendors. For more information, see Chapter 11, “Managing Smart Upload,” on page 77.

Add a Name Pattern

To create a name pattern for a creative:

1. On the top navigation bar, click the Creative tab.
2. Click the Name Patterns subtab.
3. Click + Add New Creative Name Pattern.
4. Enter information in the Name field.

Note: You can enter only letters, numbers, dashes, dots, and underscores.
5 In the **Pattern** field, enter a regular expression or a string that will be used to generate the name of each creative from the file that is uploaded from third-party vendors.

6 Click **Add Creative Name Pattern**.

---

### Edit a Name Pattern

To edit a name pattern for a creative:

1 On the top navigation bar, click the **Creative** tab.

2 Click the **Name Patterns** subtab.

3 Click the name pattern name or click ![icon](image) in the row for the creative. The *Edit Name Pattern* page appears.

4 Modify the information in the **Name** field.

   **Note:** You can enter only letters, numbers, dashes, dots, and underscores.

5 In the **Pattern** field, modify the regular expression or the literal string used to generate the name of each creative from file that is uploaded from third-party vendors.

6 Click **Update**.

---

### Delete a Name Pattern

To edit a name pattern for a creative:

1 On the top navigation bar, click the **Creative** tab.

2 Click the **Name Patterns** subtab.

3 In the row for a name pattern, click ![icon](image) and then click **OK**.
Managing Creative Formats

About Creative Formats

Creative formats provide a convenient way of formatting the look and function of creatives that are delivered through SAS 360 Match. The creative formats are versatile because everything from a text link to a custom XML file for a video player can be set up in a format. Creative formats also help set up third-party creatives. Creative formats are based on two main elements: the format template (the code that is served to the visitor when a creative using this format is selected for delivery), and the accompanying format fields (which contain user-supplied data that is specific to each creative).

Animated GIF
This format is used with animated GIFs. There are no custom format fields required. When visitors click on the image, the link is opened in the same window.

Animated GIF Opening In New Window
This format is used with animated GIFs. There are no custom format fields required. When visitors click on the image, the link is opened in a new window.

Flash
This format should be used with all Flash creatives (SWF files). The minimum version required to view the file must be entered in the Minimum version field. For example, if Flash 9.0 is required to view the file, you must enter 9 or 9.0.
Chapter 13 / Managing Creative Formats

Generic HTML
This format is used when you specify that your own HTML file is to be used for the creative instead of an existing template.

Note: This template can be used for both third-party and non-third-party creatives.

HTML5
This format is used when you specify the format that you want to use when uploading HTML5 ads.

Note: The default format is an HTML5_iframe system format.

Standard-Atlas_iframe
You use the Atlas Iframe format with third-party Atlas Rich Media tags. Use this template if the Atlas tags contain iframes or use the iview call. This template requires the Atlas unique identifier and Atlas unique code fields. The unique identifier is the three-character code before /iview/, and the unique code is the string after /iview/.

Standard-Atlas_javascript
You use the Atlas JavaScript format with third-party Atlas Rich Media tags. Use this template if the Atlas tags contain JavaScript or use the jview call. This template requires the Atlas unique identifier and Atlas unique code fields. The unique identifier is the three-character code before /iview/, and the unique code is the string after /iview/.

Standard-DoubleClick_iframe
You use this format with DoubleClick tags that use an iframe or /adi/ call. Do not use this format if publisher or placement IDs are used in the tag. This template requires the Dfa flight tags and Dfa size custom format fields. The flight tag is the string after /adi/. The size is the string that contains width= and height=.

Standard-DoubleClick_iframe_2
You use this format with DoubleClick tags that use an iframe or adi call, and tags that contain publisher and placement IDs. This template requires the Dfa advertiser, Publisher id, and Placement custom format fields. Dfa advertiser is the string after /adi/. The publisher ID follows publisher= and the placement ID follows placement=.

Standard-DoubleClick_javascript
You use this format with DoubleClick tags that use JavaScript or adj call. Do not use this format if publisher or placement IDs are used in the tag. This template requires the Dfa flight tags and Dfa size custom format fields. The flight tag is the string after /adj/. The size is the string that contains width= and height=.

Standard-DoubleClick_javascript_2
You use this format with DoubleClick tags that use JavaScript or adj call, and tags that contain publisher and placement IDs. This template requires the Dfa advertiser, Publisher id, and Placement custom format fields. The publisher ID follows publisher= and the placement ID follows placement=.

Standard-Eyeblaster_javascript
You use this format with Sizmek (formerly known as Eyeblaster) tags. This format does not include support for the Sizmek iframe buster. The template requires only the Script src url custom field. Include the entire URL after script
src=, but should exclude the parameters &ord= and &ncu= and the values that precede them. Enter the entire URL into this field from the tag, excluding &ncu=.

Sticky Format
You use this format to enable a set of creatives to persist, rather than just one being served. This enables any of the creatives in the set to serve each time, rather than always favoring the first creative that served.

All system creative formats have a viewability feature that counts how many times a creative has been viewed on a visitor’s browser or device. To start logging viewability counts, contact SAS Technical Support.

About Frequency Capping
Frequency capping, the ability to limit the exposure of creatives over a specified time span, can be applied to a creative format and at the campaign, flight, and creative levels. Capping can also be applied to impressions, clicks, and conversions. Frequency capping is strictly evaluated. That is, if the value is reached at any level (creative format, campaign, flight, or creative levels), SAS 360 Match does not consider the object, and any hierarchical dependents, for delivery. For example, if the cap has been met at the campaign level, any flights in that campaign is not considered for delivery. Frequency capping for clicks or actions results in SAS 360 Match not serving the creative associated with the click or action until the visitor is qualified to see it again under the frequency capping policy.

Add a Creative Format

1. On the top navigation bar, click the Creative tab.
2. Click the Creative Formats subtab.
3. Click + Add New Creative Format.
4. Enter information in the Name field.
   
   Note: You can enter only alphanumeric characters (a–z, A–Z, 0–9), underscores, and hyphens.

5. Enter information in the Description field.
6. In the Target field, enter the first few letters of the target’s name and then select the target from the list. Adding the creative to a flight automatically applies the target to the flight creative.
7. If you do not want snippets added to the creative format, select Skip snippets. For more information about snippets, go to Chapter 28, “Managing Snippets,” on page 151.
8 Use the **Frequency Caps** panel to set options that affect the frequency limits for impressions, views, clicks, or conversions.

- Enter a value in the **Quantity** field to specify the number of impressions, views, clicks, or conversions to serve to a visitor.
- Enter a value in the **Period** field to specify the period of time that must elapse after the quantity is reached for impressions, views, clicks, or conversions before a visitor is eligible to receive the flight again. For example, if you enter 3 in the **Quantity** field and 1 week in the **Period** field, once a flight is shown three times to a visitor, the flight is not shown again to the visitor until after a one-week waiting period.

**Note:** You must enter an integer value in the **Period** field. For example, enter 1 hour instead of hour. A **per day** period indicates a calendar day that runs from midnight of one day to midnight of the next day instead of a 24-hour time span. A month indicates 30 days instead of the actual number of days of a specific month.

- Enter a value in the **Over Lifetime** field to specify the number of impressions, views, clicks, or conversions to serve to a visitor over the lifetime of the flight.
- Enter a value in the **Per Session** field to specify the number of impressions, views, clicks, or conversions to serve to a visitor over the course of a visitor session. A visitor session is initiated whenever an ad request is made, and then, by default, persists for 30 minutes after the visitor’s last request.

For more information, see "About Frequency Capping" on page 83.

9 In the **Format Fields** section, to add a field, enter information in the **Name** field and the optional **Description** field. Select **Media** or **Required**, if desired, and then click **+ Add Field**. These items can be reordered by dragging and dropping them.

10 In the **Format Template** section, select and configure a template source.

- For the **Upload** template source, do the following:
  - From the **MIME Type** list, select application_javascript (application/javascript), application_xml (application/xml), JS (application/javascript), text_html (text/html), text_javascript (text/javascript), or xml (application/xml).

  **Note:** You can create your own MIME types. For more information, see "Add a MIME Type" on page 91.

  - Click **Choose File**, navigate to the file that you want to upload, and then click **Open**.

- For the **Text** template source, do the following:
  - From the **MIME Type** list, select application_javascript (application/javascript), application_xml (application/xml), JS (application/javascript), text_html (text/html), text_javascript (text/javascript), or xml (application/xml).

  - Enter information in the **Text** box. The Text is the code that specifies how the creative is going to be displayed and how it functions.

- For the **Network** template source, do the following:
From the MIME Type list, select application_javascript (application/javascript), application_xml (application/xml), JS (application/javascript), text_html (text/html), text_javascript (text/javascript), or xml (application/xml).

From the Request Method list, select GET or POST.

Enter the network URL in the Request URL field.

Enter information in the Request Headers field.

From the Response Type list, select HTML, JSON, or XML. The selection determines what is produced for the creative that is sent back to the visitor's browser (in response to the network request). When the network directly produces HTML or JavaScript content for the creative, the response template should be left empty. In this case, no processing is done on the network's response, and it is sent as is to the visitor's browser. When the network produces an XML or JSON response from metadata about the creative, the response template must be defined to construct the final creative content from the data provided by the network.

Enter information in the Response Template field. The response template is similar to a standard creative template because it contains text that defines the HTML or JavaScript content of the resulting ad. Tokens can be referenced in the same way. All of the tokens that are available to standard creative templates can be used here as well. In addition, a special %%NC%% token is used to reference selected content from the network's XML or JSON response.

The %%NC%% token refers to the entire response from the network creative. If the response type is HTML, use %%NC%% in the response template. If the response type is XML or JSON, you can refer to individual parts of the response to build a custom response in the response template. The %%NC.a%% token refers to a top-level XML or JSON element named "a", whereas the %%NC.a.b%% token refers to a second-level element named "b" inside a top-level element named "a".

To add a token pattern, click + Add Token Pattern, select a tag from the list, and enter information in the Token field. Repeat this step for each token pattern that you want to add.

Tokens that reference tags that specify multiple values (for example, /SITE=A,B,C) can reference a specific value. The syntax for these tokens is %%TOKEN:+1%% or %%TOKEN:-1%% (the plus and minus signs are required). Starting from 0, the specified number determines which value in the comma-separated list is returned. Negative numbers reference the values that are relative to the end of the list. For example, +1 returns the second value (or B in this example), and -1 returns the last value (or C).

Note: To specify a default value in the token that is used when no other value is provided, enter %%TOKEN:?"default value"%%. You can also set default values (for example, enter %%TOKEN:?"%%OTHER:?"default for the default"%%)

11 Click Add Creative Format.
View a Creative Format

1. On the top navigation bar, click the Traffic tab.
2. Click the Creative Formats subtab.
3. Click on the row for the creative.

Edit a Creative Format

1. On the top navigation bar, click the Creative tab.
2. Click the Creative Formats subtab.
3. Click the creative format name or click on the row for the creative. The Edit creative format name Creative Format page appears.
4. Edit the Name, Description, and Target fields as necessary.
5. If you do not want snippets added to the creative format, select Skip snippets. For more information about snippets, go to Chapter 28, "Managing Snippets," on page 151.
6. Use the Frequency Caps panel to set options that affect the frequency limits for impressions, views, clicks, or conversions.
   - Enter a value in the Quantity field to specify the number of impressions, views, clicks, or conversions to serve to a visitor.
   - Enter a value in the Period field to specify the period of time that must elapse after the quantity is reached for impressions, views, clicks, or conversions before a visitor is eligible to receive the flight again. For example, if you enter 3 in the Quantity field and 1 week in the Period field, once a flight is shown three times to a visitor, the flight is not shown again to the visitor until after a one-week waiting period.

   Note: You must enter an integer value in the Period field. For example, enter 1 hour instead of hour. A per day period indicates a calendar day that runs from midnight of one day to midnight of the next day instead of a 24-hour time span. A month indicates 30 days instead of the actual number of days of a specific month.

   Enter a value in the Over Lifetime field to specify the number of impressions, views, clicks, or conversions to serve to a visitor over the lifetime of the flight.
Enter a value in the **Per Session** field to specify the number of impressions, views, clicks, or conversions to serve to a visitor over the course of a visitor session. A visitor session is initiated whenever an ad request is made, and then, by default, persists for 30 minutes after the visitor’s last request.

For more information, see "About Frequency Capping" on page 83.

7 To add a field, click **+ Add Field**, enter information in the **Name** field and the optional **Description** field, and then select **Media** or **Required**, if desired. Repeat this step for each field that you want to add.

8 In the **Format Template** section, select and configure a template source.

- For the **Upload** template source, do the following:
  - From the **MIME Type** list, select `application/javascript (application/javascript)`, `application_xml (application/xml)`, `JS (application/javascript)`, `text_html (text/html)`, `text_javascript (text/javascript)`, or `xml (application/xml)`.

  **Note:** You can create your own MIME types. For more information, see "Add a MIME Type" on page 91.

  - Click **Choose File**, navigate to the file that you want to upload, and then click **Open**.

- For the **Text** template source, do the following:
  - From the **MIME Type** list, select `application/javascript (application/javascript)`, `application_xml (application/xml)`, `JS (application/javascript)`, `text_html (text/html)`, `text_javascript (text/javascript)`, or `xml (application/xml)`.
  - Enter information in the **Text** box. The **Text** is the code that specifies how the creative is going to be displayed and how it functions.

- For the **Network** template source, do the following:
  - From the **MIME Type** list, select `application/javascript (application/javascript)`, `application_xml (application/xml)`, `JS (application/javascript)`, `text_html (text/html)`, `text_javascript (text/javascript)`, or `xml (application/xml)`.
  - From the **Request Method** list, select **GET** or **POST**.
  - Enter the network URL in the **Request URL** field.
  - Enter information in the **Request Headers** field.
  - From the **Response Type** list, select **HTML**, **JSON**, or **XML**. The selection determines what is produced for the creative that is sent back to the visitor’s browser (in response to the network request). When the network directly produces HTML or JavaScript content for the creative, the response template should be left empty. In this case, no processing is done on the network’s response, and it is sent as is to the visitor’s browser. When the network produces an XML or JSON response from metadata about the creative, the response template must be defined to construct the final creative content from the data provided by the network.
  - Enter information in the **Response Template** field. The response template is similar to a standard creative template because it contains text that defines the HTML or JavaScript content of the resulting ad. Tokens can be referenced in the same way. All of the tokens that are available to
standard creative templates can be used here as well. In addition, a special %%NC%% token is used to reference selected content from the network's XML or JSON response.

The %%NC%% token refers to the entire response from the network creative. If the response type is HTML, use %%%NC%% in the response template. If the response type is XML or JSON, you can refer to individual parts of the response to build a custom response in the response template. The %%%NC.a%% token refers to a top-level XML or JSON element named "a", whereas the %%%NC.a.b%% token refers to a second-level element named "b" inside a top-level element named "a".

- To add a token pattern, click + Add Token Pattern, select a tag from the list, and enter information in the Token field. Repeat this step for each token pattern that you want to add.

  Tokens that reference tags that specify multiple values (for example, /SITE=A,B,C) can reference a specific value. The syntax for these tokens is %%%TOKEN:‘+1’% or %%%TOKEN:‘-1’% (the plus and minus signs are required). Starting from 0, the specified number determines which value in the comma-separated list is returned. Negative numbers reference the values that are relative to the end of the list. For example, +1 returns the second value (or B in this example), and -1 returns the last value (or C).

  Note: To specify a default value in the token that is used when no other value is provided, enter %%%TOKEN:?’default value’%%. You can also set default values (for example, enter %%%TOKEN:?’%%OTHER:?’default for the default’%%).

9 Click Update.

Copy a Creative Format

1 On the top navigation bar, click the Traffic tab.

2 Click the Creative Formats subtab.

3 In the row for a creative, click . The Edit creative format name Creative Format page appears.

4 Enter unique information in the Name field, and make desired edits and selections. For more information, see “Edit a Creative Format” on page 86.

5 Click Update.
Delete a Creative Format

1. On the top navigation bar, click the Traffic tab.
2. Click the Creative Formats subtab.
3. In the row for a flight, click  and then click OK.
Managing MIME Types

About MIME Types

MIME types enable you to specify HTTP content types when a creative is delivered.

Add a MIME Type

1. On the top navigation bar, click the Traffic tab.
2. Click the MIME Types subtab.
3. Click + Add New MIME Type.
4. Enter information in the Name field and the Content type fields.
5. Click Add MIME Type.
Edit a MIME Type

1. On the top navigation bar, click the Traffic tab.
2. Click the MIME Types subtab.
3. Click the MIME type name or click in the row for the MIME type. The Edit MIME type name MIME Type page appears.
4. Enter information in the Name field and the Content type fields.
5. Click Update.

Delete a MIME Type

1. On the top navigation bar, click the Traffic tab.
2. Click the MIME Types subtab.
3. In the row for a MIME type, click and then click OK.
About Targets

Targets provide a powerful and convenient way of identifying a specific demographic using sites, areas, custom tags, geotargeting, keywords, and visitor browser information. Targets can be applied to flights, tiers, products, and creatives. Targeting is one way to control who gets to see what ad, and where. Targeting enables you to deliver ads to specific demographics and page locations. You can group key=value pairs to create targets that represent audience and content segments.

You can specify a target rule (targeting operators "Is empty" and "Is not empty") for either the presence or lack of a tag in an ad request. The operator is selectable only for tags (any type, including integer and decimal), user agent, referrer, and keyword.
Understanding Targets

Targets enable you to control which ads your visitors see when they are on your site. Use targets to deliver ads to specific groups of visitors when they go to specific page locations, such as delivering an ad for a local bank that offers automobile loans to visitors from Detroit who are on a car dealership page.

Build key=value pairs when you create your targets. For predefined tags such as SITE and AREA, select the values in the flight edit screen. A targeting string of key=value pairs is inserted in an ad call on a web page. The key=value pairs are assigned to flights to deliver to that ad call.

The key=value pairs are designed to segment and organize your site or sites and visitors in a hierarchical fashion. Keys are referred to as tags in SAS 360 Match. An example of a tag would be SITE, with possible values that include ABC, MSNBC, CNN, and FOX. On the CNN web page, the ad call would contain SITE=CNN in the targeting string. You can target flights to deliver to the page by selecting the CNN value for SITE in the flight’s targeting setup.

SAS 360 Match provides you with flexibility in how you target pages and visitors. You can use predefined tags such as SITE, AREA, and SIZE, as well as geotargeting tags. You can specify the values for the predefined tags except for geotargeting tags. For more information, see “About Predefined Tokens” on page 143. You can also create custom tags, usually called tags.

Use tags in a hierarchical manner so that your targeting parameters are easy to understand and reporting is easier. Here are examples of tag hierarchy:

- SITE= NEWS (and) AREA= LOCAL {or} WORLD {or} USA {and} AD_POSITION= TOP {or} BOTTOM
- SITE= AUTOS (and) AREA= NEW {or} USED

With the tags defined above, you can target a flight to SITE=NEWS/AREA=WORLD/AD_POSITION=TOP/SIZE=300x250. The flight serves to only ad calls that contain the specified key=value pairs. If the flight is not explicitly targeted to a specific key=value pair, then it can serve to all values of that tag. For example, if the flight is targeted to SITE=NEWS/AREA=WORLD only, it can serve to ad calls that contain AD_POSITION=TOP or AD_POSITION=BOTTOM.

Defining Targets

When multiple targeting elements are included in a target, you can specify how they are grouped. The options are Match Any, Match All, Don’t Match All, and Don’t Match Any.

- **Match All** is the equivalent of using the Boolean AND operator. If all the statements on an incoming ad request match all the target rules, the ad is served.
- **Match Any** is the equivalent of using the Boolean OR operator. If any statement on an incoming ad request matches any target rule, the ad is served.
- **Don’t Match All** is the equivalent of using the Boolean AND and NOT operators. If all the statements on an incoming ad request match all the target rules, the ad is not served. The operator is the negation of the **Match All** operator.

- **Don’t Match Any** is the equivalent of using the Boolean OR and NOT operators. If any statement on an incoming ad request matches any target rule, the ad is not served. The operator is the negation of the **Match Any** operator.

Note: **Don’t Match Any** and **Don’t Match All** are targeting operators that exclude groups of targeting statements. These operators can be used when creating new targets or creating rules for a flight or line item. For example, if you want to include any of several target site values but also want to exclude a specific target, select **Don’t Match All** with those targets specified. The target can be excluded without creating a new negative target or statement.

For example, consider the interaction of the ad request with `/SITE=CONNECT/AREA=HEALTH/POS=1/AGE=23` and a target with SITE=Connect, AREA=Doctor, POS=1, and AGE=18.

![Targeting Example](image)

The flight cannot serve because AREA and AGE values in the target do not match the values in the ad request, even though the SITE and POS values match. The **Match All** operator requires that all the values match. If the group target option is set to the **Match Any** operator, the target matches the ad request and the flight is served.

You can use wildcards to target multiple values without specifying each one individually. The percent sign (%) specifies a wildcard of any length, including no characters. An underscore (_) specifies a wildcard of a single character. In the example below, the target uses both wildcard characters.

![Wildcards Example](image)

In the target, SITE must have a value like CON%, using the percent sign wildcard to represent multiple characters. The target and ad request match if the SITE value passed in is CONNECT, but do not match if the value is 123CONNECT because the value must start with CON.
The target also specifies that the AREA value must be like DOC_OR, using the underscore wildcard to represent one character. The target and ad request match if the AREA value passed in is DOCTOR but not if it is DOC123TOR because the wildcard represents only one character.

You can also create groups of elements. For example, you can separate your elements so that there is a group where a single element has to match and another group where all the elements have to match. For example, here is a target with two groups:

The first group requires that the SITE and AGE values match. The second group requires that any of the three AREA values match. The main grouping option at the top is set to Match All. This means that both sets of groups must match. In other words, the SITE, AGE, and one of the AREA values must match. If the main grouping option is Match Any, only one of these groups needs to match.

### About Targetable Values

Targets consist of left values, operators, and right values. Left values are the elements being targeted, like sites, areas, tags, and so on. The operator specifies how it is being targeted (for example, equals, not equal to, like, and so on).

**Note:** Contact SAS Technical Support to configure the tag validation setting. When the tag validation check is turned off, you can target any tag in the left value, whether or not it exists in SAS 360 Match. When the check is turned on, you can validate the left-value target name so that only known values are allowed.
The right value is the actual value of the element selected (for example, New York City would be a right value if City was the left value). Every tag that is defined in the system can be targeted. When creating a target, you can also use the following predefined left values:

Accepts Cookies
This value can be used to identify visitors that do or do not accept cookies. This is useful when a particular type of creative might require cookie support. It is also part of a set of tools for click fraud bot detection.

Area
All areas that are set up in the system can be targeted.

Date
For keys that are of the date type, such as occurrence or expiration date, you can set the value to a specific date, a range of dates, or to a relative number of days before or after the current date. For example, you can send reminders to customers to renew their subscriptions when their memberships are within 60 days of the expiration date.

TIP  To specify a range of dates, define one target for the start of the date range and another target for the end of the date range.

Day of Week
Use the day of week options to target a specific day or multiple days in a week. The day of week is based on the time zone of the server, not the visitor. For example, if it is a Tuesday according to the system’s time zone, the rules for Tuesday apply to the target even though it is Wednesday in the visitor’s time zone. Select multiple days in the day-of-week drop-down list by using the Ctrl or Shift buttons with the mouse. You can create a target that combines time range and day of the week, such as a target that specifies that the target is active from 18:00 to 21:00 on Mondays, Wednesdays, and Fridays.

Device Values
The following tags are based on device values found for the visitor:

- dev_type
- dev_os
- dev_browser_name
- dev_display_width
- dev_display_height
- dev_flash_capable
- dev_html_audio
- dev_html_video

Domain
The host name value of the visitor requesting the ad. For example, a target containing *Domain Like *.edu would target all visitors with a host name ending with .edu.

Event
A specific event with a count, a duration, and a relative time window. Examples and descriptions follow:
Note: To compare events, select an event, click ![Select another event](image.png), and then enter the first few letters of an event name in the Events field and then select the event from the autosearch results.

LVal="EVENT.MYEVENTNAME" Oper="Less Than" RVal="3,0,300"
match if the visitor has experienced fewer than three occurrences of the event MYEVENTNAME between 0 and 300 seconds ago (that is, in the last 300 seconds)

RVal="3,86400,172800" between 86,400 and 172,800 seconds ago (that is between 24 and 48 hours ago)

RVal="3,2015-09-01,2015-09-30" between 00:00:00 on 2015-09-01 and 23:59:59 on 2015-09-30

RVal="3,2015-09-01" (missing third parameter) on or after 00:00:00 on 2015-09-01

RVal="3,,2015-09-30" (missing second parameter) on or before 23:59:59 on 2015-09-30

RVal="3" (missing second and third parameter) ever (that is, visitor has < 3 events ever)

Geotargeting Values

Geotargeting is based on the evaluation of the request IP. The application compares the IP to a data file obtained from a vendor. The vendor is responsible for updating the file. The application receives an updated file from vendors every week. There is an error rate of around 3%. Device values are also based on data received from vendors. The application has a specialized device detection module that a vendor keeps up-to-date.

The following tags are based on geotargeting values found for the visitor:

- **City**
  
  For a list of city names (cross-referenced with country) and region (state or province) names that are available for targeting in SAS 360 Match, download the [City Codes for Geotargeting ZIP file](#). Because many city names are not unique, pair a city target with a region or country target to make sure that the correct city is targeted.

- **Conn Speed**
  
  These are the available bandwidth values:
  
  - **broadband**: high-speed connection, but the specific type is unknown.
  - **cable**: high-speed connection over cable infrastructure.
  - **dialup**: modem used to connect at speeds up to 56 Kbps.
  - **mobile**: cellular network connection (for example, 3G, 4G, or 4G LTE).
  - **oc12**: high-speed connection at speeds up to 622 Mbps.
  - **oc3**: high-speed connection at speeds up to 156 Mbps.
  - **t1**: high-speed connection limited to approximately 1.5 Mbps.
  - **t3**: high-speed connection at speeds up to 45 Mbps.
  - **satellite**: connection is via satellite. The speed varies but generally is similar to the speed of a broadband connection.
- **ultrabb**: high-speed connection at speeds greater than 45 Mbps
- **wireless**: connection is via a wireless local area network (WLAN). The speed varies but generally is similar to the speed of a broadband connection.
- **xdsl**: high-speed connection over a DSL infrastructure.

- **Country**
  For a list of country names and their three-letter country codes that are available for targeting in SAS 360 Match, download the [Country Codes for Geotargeting CSV file](#).

- **ISP name**
  For a list of ISP and business names that are available for targeting in SAS 360 Match, download the [ISP Names for Geotargeting CSV file](#).

- **Metro Code**
  For a list of metro code areas with their numeric designations that are available for targeting in inSAS 360 Match, download the [Metro Codes for Geotargeting CSV file](#). Codes are for the US, Great Britain, and France.

- **Proxy description**

- **Proxy type**

- **Region**
  For a list of region names and their region values that are available for targeting in inSAS 360 Match, download the [Region Codes for Geotargeting CSV file](#). Region is equivalent to state or province.

- **NAICS code**

- **ZIP code text**

- **IP Address**
  The IP address of the visitor can be targeted using this value.

- **Keyword**
  Multiple keywords can be specified in an ad call, and these keywords can be targeted.

- **Recurrence**
  Specify a start and end time, or duration for this target. Also, set a weekly or monthly frequency for the target, as well as the specific pattern for that recurrence.

- **Referrer URL**
  This targets the referring URL value returned by the visitor’s browser. For example, if the ad call resided on [http://www.aimatch.com](http://www.aimatch.com), then this URL would be reported as the referrer URL by the browser. Note that not all browsers report this value correctly, and ad calls in IFRAMEs might not report correctly either.

- **Site**
  All sites that are set up in the system can be targeted

- **Target**
  A target can reference other targets.

- **Time**
  You can create a target that is active during a specific time or range of times. When the target is applied to a flight, the target is delivered only during the
specified hours each day, from midnight of one day to midnight of the following
day. The target uses the time zone for the server, not the visitor.

The available operators for a time target are **Before**, **After**, and **Between**. The
**Before** operator delivers the target from the previous midnight to the stated end
time. For example, a target that is configured with **Before** 02:00 is active from
midnight until 2 a.m. The **After** option enables the target to deliver from the start
time until midnight. For example, a target that is configured with **After** 11:30 a.m.
is active from the start time until midnight. Specify an hourly range for the
**Between** operator.

The time values do not roll over to the next day. To configure a target to deliver
during between 23:00 and 01:00, set up the target to match two statements, one for
**After** 23:00 and another for **Before** 02:00.

You can create a target that combines time range and day of the week, such as
a target that specifies delivery from 18:00 to 21:00 on Mondays, Wednesdays,
and Fridays.

**User Agent**

This is the user agent value returned by the visitor’s browser. This can be used
to target to specific browsers, operating systems, and or a combination of
browsers and operating systems.

---

**Targeting Multiple Values**

You can specify multiple values for most tags used in targeting, including site, area,
all custom tags, geo tags, geo IP, size, and keyword. However, latitude and
longitude cannot have multiple values.

---

**About Multiple Values**

Separate multiple values in a tag with commas or the URL-encoding for commas
(%2d). For example, in 
/SITE=ALASKA.COM,YUKON.COM/
AREA=NEWS,POLITICS,ELECTION, the SITE tag has two values and the AREA
tag has three values.

You can use only one instance of the tag phrase. When a tag appears more than
once in an ad call, typically only the last tag is evaluated while the preceding tags
are ignored. For example, AREA=NEWS/AREA=POLITICS/AREA=ELECTION is an
incorrect way to express multiple values. In this example, only AREA=ELECTION is
evaluated.

The ad debug output lists the multiple values supplied for the tag in alphabetical
order, followed by the corresponding tag value IDs that are shown in parentheses.
An invalid tag value is assigned a value ID of 0.

The behavioral targeting analysis considers multiple values for a tag when looking
for matches to qualify a visitor for behavioral targeting traits.
Evaluating Targets

When SAS 360 Match evaluates a target rule or a tag restriction for a tier, flight, or creative, it considers all the values that are passed in for the tag. If any of the tag’s values matches the rule or restriction, then the rule is considered to match. Consider an ad call of /SITE=ALASKA.COM,YUKON.COM/AREA=NEWS,POLITICS,ELECTION. If a flight has a target of AREA=POLITICS, then the ad call matches. If the target is AREA=SPORTS, the ad call does not match.

For negative operations such as Not Equals, Not In, and Not Like, all the values for the tag must not match. For example, if the target is AREA!=SPORTS, the ad call is a match because none of the values passed in was SPORTS.

However, the following targets do not match the ad call:

- AREA!=POLITICS because POLITICS is one of the values for AREA.
- SITE Not In (YUKON.COM,CANADA.COM) because YUKON.COM is one of the values for SITE.

Logging

By default, only one value ID is logged for each tag. The value with the lowest nonzero ID is logged. If none of the values are valid, a 0 is logged.

**CAUTION**

If you use multiple tag values with the default setting where only one value ID is logged per tag, some flights might show that they appeared against targets for which they were not eligible. This is a reporting limitation and flights are delivered correctly.

You can configure SAS 360 Match to log a value that was matched while targeting flights or creatives that are served. If multiple values were matched in targeting, the value with the lowest ID is logged. If no values were matched in targeting, then logging occurs as for the default. Contact SAS Client Services to discuss the specific requirements because SAS 360 Match supports a limited number of tags in logging.

Simulation Forecasting

For simulation forecasting, a sampling of multiple values is recorded. These values are processed and used in targeting during a simulation, just as they would be during live ad serving. Invalid tag values are not sampled and are excluded from the simulation.

All ad sizes are included in sampling and are processed during the forecast simulation.
Add a Target

1. On the top navigation bar, click the Targeting tab.

2. Click the Targets subtab.

3. Click + Add New Target.

4. Enter information in the Name field.
   
   Note: You can enter only alphanumeric characters (a–z, A–Z, 0–9), special characters (~@#$%^&*-+(){}][|<>"='), spaces, underscores, and punctuation marks (!.?;:). You cannot enter double quotation marks or commas.

5. Enter information in the Description field.

6. Check the Segment box to evaluate the target when requesting data via the getsv API for a particular visitor.
   
   Note: Future enhancements will build on the use of the segment designation.

7. Select Match All, Match Any, Don't Match All, or Don't Match Any. This global operator applies to all the target types that are specified in this section. For more information, see “Defining Targets” on page 96.

8. Define your key and value pairs.
   
   Note: The target definition string is limited to 32,731 bytes. The string is the concatenation of the rules from the target_rules table, which is stored in the definition field of the targets table.
   
   - Specify the target type in the text field on the left. As you type, a drop-down list of matching key names and target types is displayed. Select an existing entry or create a new target type. All target type names are converted to uppercase. Names for target types that you create cannot contain spaces or Unicode.
   
   - Select an operator to define the relationship between the target type on the left and the value on the right.
   
   Note: The operators that are available depend on the target type that is selected on the left.
   
   - In the text field on the right, enter the value that is related to the target type on the left. This field is limited to 32,680 bytes.
   
   - To add more target types, click +.
To create groupings of the key and value pairs, click on an empty row. The operator in the group applies to the key/value pairs in the group and overrides the global operator.

9 Click Add Target.

---

### View a Target

1. On the top navigation bar, click the **Targeting** tab.
2. Click the **Targets** subtab.
3. Click in the row for the target. The target name page appears.
4. To view the history of edits to the target, select **View History**.
5. The Associations section lists the items, such as events and flights, that are linked with the target. Click on the item name to edit. To remove an item associated with the target, click in the row for the association and then click **OK**.

### Edit a Target

1. On the top navigation bar, click the **Targeting** tab.
2. Click the **Targets** subtab.
3. Click the target name or click in the row for the target. The Update Target page appears.
4. Make edits in the **Name** and **Description** fields.
5. Modify the targeting values.
6. Click **Update** to save the changes.
Copy a Target

Note: You can create an original flight only in a campaign. For more information, see “Add a Flight to a Campaign” on page 24.

1. On the top navigation bar, click the **Targeting** tab.
2. Click the **Targets** subtab.
3. In the row for a target, click ![copy icon]. The Update Target page appears.
4. To make edits to the target, follow the instructions in “Edit a Target” on page 105.

Delete a Target

1. On the top navigation bar, click the **Targeting** tab.
2. Click the **Targets** subtab.
3. In the row for a target, click ![delete icon] and then click **OK**.
Managing Tags

About Tags

You can create a custom set of tags to precisely target advertisement positions or to pass additional data into SAS 360 Match that is made available for targeting. Tags are key-value pairs that are used for targeting and to map audience and content segments. Taxonomies are the basic building blocks of your audience, product, and data scheme. Key-value pairs represent the data that is passed to SAS 360 Match. This data influences real-time ad selection, can help refine your concept of audience, and improve product definitions.

Tags can be strings, integers, decimals, or dates.

Integer tags contain only whole numbers as tag values. These tags enable you to easily implement comparison operators such as greater than and less than to targeting. All possible tag values (integers) are automatically populated when an integer tag is created.

Add a Tag

1. On the top navigation bar, click the Targeting tab.
2. Click the Tags subtab.
3. Click + Add New Tag.
4 Enter information in the Name field.

Note: You can enter only alphanumeric characters (a–z, A–Z, 0–9) and underscores. Tag names must begin with a letter.

5 Select a Type (String, Integer, Decimal, or Date). Integer and Decimal tags do not use explicitly defined values. Instead, any numeric value with a decimal can be specified in an ad request and can be defined in targeting. Integer and Decimal tags should not be used with dynamic inventory adjustments. The Date tag enables you to target any date. You do not need to manually create the date values.

6 (Optional) Select a Tag group. For information about tag groups, see Chapter 17, "Managing Tag Groups," on page 111.

7 To enable logging for the tag in the Tags Report, select Tagsum logging. For more information, see "About Operational Reports" on page 239.

8 Click Add Tag.

9 Enter values for the tag in the Values field, and then click Add Values.

Note: Values can contain letters, numbers, and all special characters except for commas and the pipe character ( | ). You can use commas to separate multiple values. Use the pipe character to specify a display name for the tag value with tag_value|display_name. You can enter up to 100 values. For a larger set of values, use the XML API.

10 Select All Sites to enable all sites to use the tag. To specify the sites that use the tag, select Specific Site(s), and select one or more sites from the list. Then click Save Sites.

---

Edit a Tag

1 On the top navigation bar, click the Targeting subtab.

2 Click the Tags tab.

3 Click the tag name or click in the row for the tag. The Edit Tag page appears.

Note: To filter the list, expand the Filtering panel and enter information in the Name like or Tag group name contains fields.

4 Enter information in the Name field.

Note: You can enter only letters, numbers, hyphens, dots, and underscores. The name must start with a letter.
To enable tagsum logging, select **Tagsum logging**.

Click **Update**.

Enter values for the tag in the **Values** field, and then click **Add Values**.

**Note:** Values can contain letters, numbers, and all special characters except for commas and the pipe character ( | ). You can use commas to separate multiple values. Use the pipe character to specify a display name for the tag value with `tag_value|display_name`. You can enter up to 100 values. For a larger set of values, use the XML API.

Select **All Sites** to enable all sites to use the tag. To specify the sites that use the tag, select **Specific Site(s)**, and select one or more sites from the list. Then click **Save Sites**.

---

**Delete a Tag**

1. On the top navigation bar, click the **Targeting** tab.
2. Click the **Tags** subtab.
3. In the row for a tag, click ![Edit icon] and then click **OK**.
Managing Tag Groups

About Tag Groups

Tag groups offer a way to group a set of individual tags. For example, the cars tag group can include the tags for "make," "model," and "color."

Note: Each tag can be part of only one tag group.

For information about tags, go to “About Tags” on page 107.

Add a Tag Group

1 On the top navigation bar, click the Targeting tab.
2 Click the Tag Groups subtab.
3 Click + Add New Tag Group.
4 Enter information in the Name field.

Note: You can enter only letters, numbers, hyphens, dots, and underscores. The tag group name must start with a letter.
5 (Optional) Enter information in the Tags field.
6 (Optional) Enter information in the Description field.
7 Click Add Tag Group.

---

Edit a Tag Group

1 On the top navigation bar, click the Targeting tab.
2 Click the Tag Groups subtab.
3 Click the tag group name or click in the row for the tag. The Edit Tag Group page appears.
4 (Optional) Modify the information in the Name field to rename the tag group.
   Note: You can enter only letters, numbers, hyphens, dots, and underscores. The tag group name must start with a letter.
5 (Optional) Modify information in the Tags and Description fields.
6 Click Update.

---

Delete a Tag Group

1 On the top navigation bar, click the Targeting tab.
2 Click the Tag Groups subtab.
3 In the row for a tag group, click and then click OK.
Managing Tag Value Aliases

About Tag Value Alias

When you map several aliases to a tag value, you enable ad requests or targeting rules to reference the aliases and the tag value. Reporting or forecasting on an alias is the same as reporting or forecasting on the tag value and the other aliases for the tag value.

For example, if you map the aliases NC, SC, GA, and FL to the tag value southeast, reporting or forecasting on NC references the tag value southeast and any of the other aliases mapped to it. A query for the alias SC would return the same results as a query for NC.

Add an Alias

1. On the top navigation bar, click the Targeting tab.
2. Click the Tab Value Aliases subtab.
3. Select an existing Tag from the drop-down menu.
4. Select a Tag Value for this mapping.

Note: Use wildcard characters to refine the possible values. Use % to specify a wildcard of any length, _ to specify a wildcard of a single character, or ^<keyword> to search for the keyword at the beginning of the string.
5 Enter the **Alias** and click **Save Tag Value Alias**. If you have multiple aliases for a tag value, you must add each one individually. You cannot enter multiple aliases at once.

---

**Note:** Special characters in the alias should be replaced with the encoded URL format in when you create an ad request. For example, the @ symbol should be represented by %40 in an ad request.

---

6 To filter the list of mappings, enter a portion of the tag value into the **Tag Value like** field or a portion of the alias into the **Alias like** field in the **Filtering** section.
Managing Sites

About Sites

Sites are part of the building blocks of targets. Targets offer a powerful and convenient way of targeting a specific demographic consisting of sites, areas, custom tags, geotargeting, keywords, and visitor browser information. All sites set up in the system can be targeted.

Add a Site

1. On the top navigation bar, click the Targeting tab.
2. Click the Sites subtab.
3. Click + Add New Site.
4. Enter information in the Name field.

Note: You can enter only alphanumeric characters (a–z, A–Z, 0–9), periods, underscores, and hyphens.
5 Enter information in the Description field.

6 To record and report on a revenue share for the campaigns that you have entered, enter a value in the Revenue cut field. A revenue cut is usually used when you represent sites that you do not own.

7 Click Add Site.

---

Add Multiple Sites

1 On the top navigation bar, click the Targeting tab.

2 Click the Sites subtab.

3 Click + Add Multiple Sites.

4 Enter information in the Revenue cut and Names fields.

5 Click Add Sites.

---

Edit a Site

1 On the top navigation bar, click the Targeting tab.

2 Click the Sites subtab.

3 Click the site name or click the row for the site. The Edit site name Site page appears.

4 Enter information in the Name field.

   Note: You can enter only letters, numbers, hyphens, dots, and underscores.

5 Enter information in the Description field.

6 Enter a value in the Revenue cut field.

7 Click Update.
Delete a Site

1. On the top navigation bar, click the **Targeting** tab.
2. Click the **Sites** subtab.
3. In the row for a site, click ![Delete Icon] and then click **OK**.
Managing Areas

About Areas

Areas are part of the building blocks of targets. Targets offer a powerful and convenient way of targeting a specific demographic consisting of sites, areas, custom tags, geotargeting, keywords, and visitor browser information. All areas set up in the system can be targeted.

Add an Area

1. On the top navigation bar, click the Targeting tab.
2. Click the Areas subtab.
3. Click + Add New Area.
4. Enter information in the Name field.

Note: You can enter only alphanumeric characters (a–z, A–Z, 0–9), periods, underscores, and hyphens.
Enter information in the Sites field.

6 Click Add Area.

Add Multiple Areas

1 On the top navigation bar, click the Targeting tab.
2 Click the Areas subtab.
3 Click + Add Multiple Areas.
4 Enter information in the Names fields.
5 Click Add Areas.

Edit an Area

1 On the top navigation bar, click the Targeting tab.
2 Click the Areas subtab.
3 Click the area name or click in the row for the area. The Edit area name Area page appears.
4 Enter information in the Name field.

Note: You can enter only letters, numbers, hyphens, dots, and underscores.
5 Enter information in the Sites field.
6 Click Update.

Delete an Area

1 On the top navigation bar, click the Targeting tab.
2 Click the Areas subtab.
3 In the row for an area, click and then click OK.
Managing Sizes

About Sizes

Sizes are part of the building blocks of targets. Targets offer a powerful and convenient way of targeting a specific demographic consisting of sites, areas, sizes, custom tags, geotargeting, keywords, and visitor browser information. There are many default sizes included in the system, but you can define more sizes using the Targeting and Sizes tabs.

Add a Size

1 On the top navigation bar, click the Targeting tab.
2 Click the Sizes subtab.
3 Click + Add New Size.
4 Enter information in the Name field.

Note: You can enter only alphanumeric characters (a–z, A–Z, 0–9), periods, underscores, and hyphens.

5 Enter values in the Width and Height fields.
6 Click **Add Size**.

---

**Edit a Size**

1. On the top navigation bar, click the **Targeting** tab.
2. Click the **Sizes** subtab.
3. Click the size name or click in the row for the size. The Edit size name Size page appears.
4. Make desired edits in the **Name**, **Width**, and **Height** fields.

   - **Note:** You can enter only letters, numbers, hyphens, dots, and underscores in the **Name** field.

5. Click **Update**.

---

**Delete a Size**

1. On the top navigation bar, click the **Targeting** tab.
2. Click the **Sizes** subtab.
3. In the row for a size, click and then click **OK**.
Managing Supertags

About Supertags

Supertags are special tags that can be included in an ad call and expanded into one of any number of arbitrary collections of other tags and values. Supertags can be used to ease a customer's migration from other ad servers, and provides a level of tag management to ad operations. Supertags provide a way of mapping a value to an arbitrary path information snippet. You can filter existing supertags by value and path information.

Any number of supertag values can be created to predefine multiple sets of tags and values. When an ad call includes "SUPERTAG=supertagvalue", the tags in the corresponding pathinfo are added to the ad request internally. The "SUPERTAG" tag name itself is not configurable. Multiple values can be supplied for SUPERTAG if they are separated by commas, which is similar to other tags. The resulting substitution yields the union of all the values' definitions, and later definitions take precedence. An ad call that includes SUPERTAG can freely include other tags as well, and the complete set of tags implied by that mix determines what ad is served. When a SUPERTAG value maps to a path that includes a tag that is also explicitly included in the ad call, the explicit value from the ad call takes precedence. Like other tag values, supertag values are case insensitive. Unlike other tag values, there are no restrictions on use of punctuation, and special characters need only to be URL-encoded appropriately. These relaxed restrictions maximize compatibility when supertags are used to help with migration from other ad servers.

When a supertag value has an embedded dot (period, "."), the string in front of the dot defines a namespace for the value. Different namespaces can define the same value.
Add a Supertag

1. On the top navigation bar, click the Targeting tab.
2. Click the Supertags subtab.
3. Enter the name for the supertag in the Value field.
4. Enter tag and value pairs in the Path Info field. These values are used in conjunction with the path info from an ad request during flight evaluation.
5. (Optional) In Target, enter a target that, when matched, automatically adds the supertag path info to a visitor’s ad request path info for flight evaluation.

Note: To display the full list of targets, enter %.

6. Click Save Supertag.

Filter Supertags

1. On the top navigation bar, click the Targeting tab.
2. Click the Supertags subtab.
3. Expand the Filtering section.
4. Enter information in the Value Like field.
5. Enter information in the Path Info Like field.
6. Click Filter.

Delete a Supertag

1. On the top navigation bar, click the Targeting tab.
2. Click the Supertags subtab.
3. In the row for a supertag, click and then click OK.
About Connectors

Create a connector to set up a secure connection to an external application when your customer initiates a session. You can use connectors to retrieve or transfer data between SAS 360 Match and external applications.

A connector provides a way to integrate analytic, real-time information into SAS 360 Match that can be substituted in a creative template or used for targeting during a session. The data that you retrieve from the third-party, external source can be used to influence the decision for ad delivery. You can also use connectors to gather third-party service responses and cache them to use in creative responses later.

For example, you can create a connector to retrieve current weather conditions, such as if conditions are sunny, rainy, or neither, to determine which creative to display for the ad. If the weather is sunny, you show an ad for sunglasses but you show an ad for umbrellas if it is rainy. If the weather is neither sunny nor rainy, you serve an ad for shoes.

SAS 360 Match performs geographic and device lookups, and also loads available user registration or state vector data. It then evaluates targets for connectors and makes any requests to a connector endpoint. The data and any request parameters are available to pass to an endpoint.

A connector uses an endpoint to submit requests and receive responses from an external application. A single connector can have multiple endpoints. When multiple connector endpoints are defined, all endpoints where connector targets evaluate as true are processed in parallel. You cannot use the response from one connector endpoint as input to another on the same request.

Data from a connector endpoint is stored temporarily with a visitor’s session data. New visitor sessions cannot refer to data that was retrieved from connectors in prior
sessions. Currently, a visitor can trigger a request to a connector endpoint only once during the lifetime of the visitor’s session.

Add a Connector

Use the Connector subtab to register your connector, configure the endpoints, and modify and update the settings. To add and configure a connector, you must provide basic information about the connector and add one or more endpoints for processing requests to each external application’s server.

1. On the top navigation bar, click the Targeting tab.
2. Click the Connectors subtab.
3. Click + Add New Connector.
4. Enter a unique name in the Name field to identify the connector.
5. Select a Connector Type to specify how SAS 360 Match handles the values that are returned. The available options are Generic and SAS Intelligent Decisioning (an OAUTH version 2 connector).
6. Add details or notes about the connector in the Description field.
7. Select Active to enable the connector to send requests and receive responses.
8. Click Submit.
9. After you have saved the connector, you can create and configure endpoints. To add an endpoint, perform the steps in “Add an Endpoint” on page 126.

Add an Endpoint

To configure an endpoint, you must specify the URL, basic and authorization information, and add headers and parameters as required.

To add an endpoint to a connector:

1. Click New Endpoint.
2. In the Details section:
   a. Enter a unique name in the Name field to identify the endpoint.
   b. Add details or notes about the endpoint in the Description field.
   c. Select Active to enable the endpoint to set up the connection to the external application.
d Select a **Target** to associate with the endpoint so that the endpoint is run only when that target is part of the ad request. If you do not specify a target, the endpoint is queried for every request.

e Enter the **Request URL** for the server or service that represents the external application that you want to send a request to.

f Select the **Mime Type** to specify the format of the information that is transmitted through the endpoint. The options are `application/json`, `text/plain`, `text/javascript`, `application/javascript`, `text_html`, `application_xml`, `xml`, and `JS`.

g Select the **Request Method** to specify the type of request that the endpoint sends to the external application’s server. The available requests are `GET`, `POST`, `PUT`, `PATCH`, `DELETE`, `HEAD`, and `OPTIONS`.

3 In the Authorization section, select the **Auth Type** to specify the authorization option. Select the appropriate authorization method that the endpoint must use in order to process the request for a specific external data resource through an API call.

   - **Basic Auth**: enter the user name and password for access to the URL.

   - **Bearer Token**: enter the bearer token for access to the URL.

   - **No Auth**: no authorization parameter is required for access to the URL.

   - **Oauth 2**: specify the authorization location for access to the URL.

   Note:

   Currently, SAS 360 Match supports connectors for SAS Intelligent Decisioning (password grant type authorization). You must provide the user name, user password, client ID, and client secret.

   - **JWT**: enter the JSON Web Token (JWT) required to access to the URL.

4 In the Headers section, define any headers that you want to add to the request. Enter a key, a value, and an optional description for the header. Headers represent the metadata that is associated with the API request and response.

5 In the Response Handling section, set the value of the evaluated token string for the tokens that come from the API response. You can also add an optional description for the tag and token pair.

   Note: Your tag must be predefined. For more information, see "About Tags" on page 107.
About Placements

Placements are an extension of the Partners component. Previously, one target applied by a partner could affect the entire integration with that partner. Placements extend this functionality by enabling not only multiple placement entities to be created (which enable many different targeting combinations to be used), but a placement can be configured to use several partners. Different floor prices can be set for each partner by each biddable tier. Once an ad request is received and a flight creative is selected, placements are considered for serving. If there are no bids meeting the configured floor price, the previously selected creative is used instead. If a flight creative cannot be found to match the ad request in the tier being evaluated, then placements do not serve even if they are eligible for the request.

Before placements can be created and configured, partners that are bidding to serve the placements need to be configured by SAS Technical Support. Contact Technical Support for more information about the requirements to set up a partner. Once a partner is enabled, site and size mappings should be configured under the Partners tab. Any targets specified for the partner are also applied at the placement level. For more information, see “About Partners” on page 223.
Add a Placement

Specified site values are applied as targeting to the placement, and concatenated with any targets specified as well. It is important to ensure that there are no conflicting statements. For example, if an included target has a rule “Site Equals A” and site “B” that is specified in the Sites field, the placement would not serve. It is best practice to exclude any site targeting in targets used for placements. For each unique combination of targeting, a separate placement is needed. For example, if different floor prices are needed for Site=A versus Site=B, then two placements would be necessary.

Any sites or sizes specified need to have a corresponding mapping value setup for the partner in question (if the partner requires it) under the Partners tab.

Each partner that bids to the placement should have a placement key that is configured. The placement keys, if required by the partner, are distinct from the site and size mappings under the Partners tab. If the partner needed for the placement is not in the list, contact Technical Support.

To add a placement:

1. On the top navigation bar, click the Targeting tab.
2. Click the Placements subtab.
3. Click + Add New Placement.
4. Enter information in the Name field.
5. Enter a Target.
6. Enter the primary Size for the placement. For the ad to serve, the size must be mapped on the partner page.
7. Enter more sizes for the placement in Other sizes. The sizes must be mapped.
   
   Note: This option enables you to define multiple sizes that map to one price. To assign different floor prices to each size, create multiple placements, each with a single size.

8. Select a Device to specify whether to request a video, web, or application ad.
9. Enter a Default floor price. Before floor prices can be configured, a tier must be set as biddable in order to be eligible to serve a placement. Once a tier is biddable, placements are considered for serving when that tier is evaluated for an ad request. Floor prices can then be configured for each tier by partner on the Floor Prices tab on the Placements page. The floor price specifies the lowest acceptable bid price from the configured partners. For more information, see “About Tiers” on page 45.

10. (Optional) In the Parent Placement field, enter the first few letters of a name for a placement and then select a placement from the autosearch results. If you
specify a parent placement, it is sent as a bid request in parallel with the current placement.

You typically specify parent placements when a placement needs to include different channels (display, video, or app), targets, or floor prices.

11 Define the **Sites** for the placement. The sites must already be mapped.

12 Set the **Bidding** option to determine how the bids are presented to the SSP.
   - Select **Parallel** for each size to send its own bid.
   - Select **Alternate** to send one bid that contains all the sizes that you specified.

13 Click **Add Placement**.

---

**Edit a Placement**

To edit a placement:

1 On the top navigation bar, click the **Targeting** tab.

2 Click the **Placements** subtab.

3 Click a placement name or click in the row for the placement. The **Edit Placement** page appears.

4 On the **Properties** tab, enter information in the **Name** field.

5 Enter a **Target**.

6 Enter the primary **Size**. Placement size must be mapped on the partner page or ads will not serve.

7 Enter more sizes for the placement in **Other sizes**. The sizes must be mapped.

   **Note:** This option enables you to define multiple sizes that map to one price. To assign different floor prices to each size, create multiple placements, each with a single size.

8 Select a **Device** to specify whether to request a video ad, web ad, or application ad.

9 Enter a **Default floor price**. Before floor prices can be configured, a tier needs to be set as biddable in order to be eligible to serve a placement. Once a tier is biddable, placements are considered for serving when that tier is evaluated for an ad request. Floor prices can then be configured for each tier by partner on the **Floor Prices** tab on the Placements page. The floor price specifies the lowest acceptable bid price from the configured partners.

10 (Optional) In the **Parent Placement** field, enter the first few letters of a name for a placement and then select a placement from the autosearch results. If you specify a parent placement, it is sent as a bid request in parallel with the current placement.
You typically specify parent placements when a placement needs to include different channels (display, video, or app), targets, or floor prices.

11 Select or delete any associated Sites. The sites must already be mapped.

12 Set the Bidding option to determine how the bids are presented to the SSP.
   - Select Parallel for each size to send its own bid.
   - Select Alternate to send one bid that contains all the sizes that you specified.

13 On the Network Participation tab, partners with configured sites are listed.
   Any sites configured for this partner must also have Site Mappings configured on the partner edit page or they will not have active placements. Click Edit partner network settings to go to that partner site and edit the necessary items.

14 On the Floor Prices tab, the name, target and size information is listed.
   If a bid from a partner is lower than what is specified in the placement, the bid is rejected. The default floor price on the Properties tab is used initially to populate the floor prices for each partner and tier. If the default is later changed, it does not affect the floor prices specified on the Floor Prices tab even if they have not been changed from the default value. For more information, see “About Tiers” on page 45.

15 (Optional) Click View History to see the list of edits to the placement, including when the change happened, who made the change, and the specific changes to the placement, its floor prices, and network participation.

16 (Optional) Click Test Placement to debug your placements.
   Enter the targeting parameters in the Path Info field. Click Run to test the placement.

Note: You can customize the Cookie, User Agent, and Referrer values if needed. If you do not enter a mid= cookie value, select Run twice because the first execution of the request is to get a mid= cookie. For debugging purposes, you can enter any alphanumeric string as a valid mid cookie value (for example, 0001245678A).

The information in the Cookie field might be updated and a return code and results might appear at the bottom of the page.

The Results section displays the bid request and response using the requested placement. The results show you if any of the following required information is missing from your bid request:
   - the mapped site
   - the mapped size
   - a visitor ID for the network
   - a placement key, which is an association between the network and the placement

17 Click Update.
Copy a Placement

1. On the top navigation bar, click the **Targeting** tab.

2. Click the **Placements** subtab.

3. In the row for a placement, click [Edit]. The Edit Placement page appears.

4. To make edits to the placement, follow the instructions in "Edit a Placement" on page 131.
Managing Events

About Events

Events allow an event name to be associated with one or more timestamps that correspond to a visitor action (such as visiting a certain page). Event occurrences are logged using state vector requests, and can be used to target visitors that have a certain number of event occurrences.

Add an Event

1. On the top navigation bar, click the Targeting tab.
2. Click the Events subtab.
3. Click + Add New Event.
4. Enter information in the Name field.
5. Enter a Max Count. This is the maximum number of event occurrences that should be tracked per visitor. For example, a flight could be targeted to visitors that have registered five or more occurrences of the event “homeowner”. The Max Count in this case would need to be set to at least five or higher. If a visitor registers more event occurrences than the Max Count setting, their count for the event stays at the maximum number. The default maximum setting is ten.
6 Enter a Max Age. This is the maximum age of event occurrences that should be kept. Each event occurrence has a timestamp, and if the timestamp is older than what is specified for this setting, that occurrence is discarded. For example, if a visitor has registered the event “homeowner” five or more times in the past seven days, the event would have a Max Age setting of seven days. The default maximum setting is 365 days.

Note: Spell out the time units: seconds, minutes, hours, days, months, or years. If you do not include a time unit, the default is seconds.

7 (Optional) In the Target field, enter a target consisting of rules that, when matched, logs an occurrence of the event for the visitor.

Note: To display the full list of targets, enter %.

8 Click Add Event.

---

**Edit an Event**

1 On the top navigation bar, click the Targeting tab.

2 Click the Events subtab.

3 Click an event name or click in the row for the event. The Edit Event page appears.

4 Enter information in the Name field.

5 Enter a Max Count. This is the maximum number of event occurrences that should be kept.

6 Enter a Max Age. This is the maximum age of event occurrences that should be kept.

7 Click Update.

---

**Delete an Event**

1 On the top navigation bar, click the Targeting tab.

2 Click the Events subtab.

3 Click an event name or click in the row for the event.

4 Click OK to confirm.
PART 5

Ad Assets

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Managing Media

About Media

The Media tab enables you to upload an asset to the solution.

Add New Media

1. On the top navigation bar, click the Assets tab.
2. Click the Media tab.
3. Click + Add New Media.
4. In the Advertiser field, enter the first few letters of the advertiser’s name and then select the advertiser from the list.
   
   Note: Enter % if you want to display the full list of advertisers.
5. Click Choose File to select an asset.
6. Navigate to the file that you want to upload, and then click Open.
7. Click Add Media.
Edit Media

1. On the top navigation bar, click the Assets tab.
2. Click the Media tab.
3. In the row for a medium, select a filename or click . The Edit Media page appears.
4. If you want to change the advertiser, enter the first few letters of the advertiser’s name in the Advertiser field and then select the advertiser from the list.

   Note: Enter % if you want to display the full list of advertisers.

5. If you want to use another file, click Choose File, navigate to the file that you want to upload, and then click Open. To view the existing asset, click the asset link.
6. To edit a creative for the media, click the creative filename in the Name column, and then make desired changes. For more information, see “Edit a Creative” on page 70.
7. Click Update.

Delete Media

1. On the top navigation bar, click the Assets tab.
2. Click the Media tab.
3. In the row for a media file, click and then click OK.
Managing Advertiser Creative Templates

About Advertiser Creative Templates

The Advertiser Creative Templates tab enables you to upload a file or add text to create a template.

Add an Advertiser Creative Template

1. On the top navigation bar, click the Assets tab.
2. Click the Advertiser Creative Template subtab.
3. Click + Template.
4. In the Advertiser field, enter the first few letters of an advertiser’s name and then select the advertiser from the list.

Note: Enter % if you want to display the full list of advertisers.
5 In the **Template type** field, select **Upload** or **Text**.

6 If you selected the **Upload** template type, click **Choose File**, navigate to the file that you want to upload, and then click **Open**.

7 If you selected the **Text** template type, do the following:
   a Enter information in the **File Name** field.

   **Note:** You can enter only letters, numbers, hyphens, and underscores

   b From the **MIME Type** list, select **application_xml** (application/xml), **JS** (application/javascript), or **xml** (application/xml).

   To create an MIME type, follow the instructions in “Add a MIME Type” on page 91.

   c Enter information in the **Template Text** box.

8 Click **Add Advertiser Creative Template**.

---

**Edit an Advertiser Creative Template**

1 On the top navigation bar, click the **Assets** tab.

2 Click the **Advertiser Creative Template** subtab.

3 In the row for the advertiser creative template, select the filename or click ✰.

   The Edit Advertiser Creative Template page appears.

4 To change the advertiser, remove the existing advertiser’s name, enter the first few letters of a new advertiser’s name in the **Advertiser** field and then select the advertiser from the list.

5 In the **Template type** field, select **Upload** or **Text**.

6 If you selected the **Upload** template type, click **Choose File**, navigate to the file that you want to upload, and then click **Open**.

7 If you selected the **Text** template type, do the following:
   a Enter information in the **File Name** field.

   **Note:** You can enter only letters, numbers, hyphens, and underscores

   b From the **MIME Type** list, select **application_xml** (application/xml), **JS** (application/javascript), or **xml** (application/xml).

   To create an MIME type, follow the instructions in “Add a MIME Type” on page 91.

   c Enter information in the **Template Text** box.
8 Click Update.

Delete an Advertiser Creative Template

1 On the top navigation bar, click the Assets tab.
2 Click the Advertiser Creative Template subtab.
3 In the row for the advertiser creative template, click and then click OK.

About Predefined Tokens

Tokens are placeholders for data or content that are used in creatives and creative formats. For example, because creatives vary in size, the code needs to reflect the size of each creative. Tokens for width and height represent the values of width and height for a creative. These tokens enable multiple creatives to use a single creative format that always includes the correct width and height.

Token names are in uppercase and start and end with double percent signs (%%). This formatting enables the server to identify tokens and to determine what values to replace them with. For example, if a creative has a width of 728 and a height of 90, a creative format might have the following code:

```html
<img src="%%MEDIA%%" width="%%WIDTH%%" height="%%HEIGHT%%">
```

You can have %% appear in your output if the original template contains %%%%%. A series of four % characters %%%% results in a single pair of % (%%) in the resulting token expansion (for example, Email address %%%%addr%%%% becomes Email address %addr% after substitution.

SAS 360 Match provides predefined tokens, which can be placed in both file-based and URL-based creatives. The following table lists and describes the data sources that are used to replace the tokens.

<table>
<thead>
<tr>
<th>Token</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%%ACCEPT_LANGUAGE%%</td>
<td>The language that the browser uses.</td>
</tr>
<tr>
<td>%%ADVID%%</td>
<td>The advertiser ID.</td>
</tr>
</tbody>
</table>

Note: Appending :URLENCODED (for example, %DATETIME:URLENCODED%) URL-encodes the token value. Appending :URLDECODED decodes a URL-encoded string.
<table>
<thead>
<tr>
<th>Token</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%%ALTIMAGE%%</td>
<td>The string that is entered in the Alt Image field for a creative.</td>
</tr>
<tr>
<td>%%ALTTEXT%%</td>
<td>The string that is entered in the Alt Text field for a creative.</td>
</tr>
<tr>
<td>%%BASEURL%%</td>
<td>The URL that points to the client's ad server (for example, <a href="http://crtl.aimatch.com/%7Bclient-">http://crtl.aimatch.com/{client-</a> SHORTNAME}).</td>
</tr>
<tr>
<td>%%BEACONURL%%</td>
<td>The URL that is added to the creative code returned to the page and that instructs SAS 360 Match to increment the impression count.</td>
</tr>
<tr>
<td>Note: This token requires an img src= HTML tag to be prepended to the URL. This token returns only the URL that counts beacons and would be used in contexts that call it appropriately, such as in an image tag.</td>
<td></td>
</tr>
<tr>
<td>%%CAMPID%%</td>
<td>The campaign ID.</td>
</tr>
<tr>
<td>%%CLICKDESTINATIONURL%%</td>
<td>The destination URL that is specified in a creative's Click URL field.</td>
</tr>
<tr>
<td>%%CLICKURL%%</td>
<td>The click URL that points to the SAS 360 Match ad server for counting clicks and returns the click URL that you entered for the creative to the browser for relocation.</td>
</tr>
<tr>
<td>%%CRIPTINFO%%</td>
<td>The information that was entered in the User info field in the Edit Creative window.</td>
</tr>
<tr>
<td>%%CUSTOMER%%</td>
<td>The client's short name, which is the subdomain name for the client's user interface.</td>
</tr>
<tr>
<td>%%DATE%%</td>
<td>The date value from the /date= tag in an ad call.</td>
</tr>
<tr>
<td>%%DATETIME%%</td>
<td>The current date and timestamp value in the YYYY-MM-DD HH:MM:SS format.</td>
</tr>
<tr>
<td>%%DEV_BROWSER_NAME%%</td>
<td>The browser type.</td>
</tr>
<tr>
<td>%%DEV_DISPLAY_HEIGHT%%</td>
<td>The height, in pixels, of the device display when it is in its default orientation.</td>
</tr>
<tr>
<td>Token</td>
<td>Description</td>
</tr>
<tr>
<td>-------</td>
<td>-------------</td>
</tr>
<tr>
<td>%%DEV_DISPLAY_WIDTH%%</td>
<td>The width, in pixels, of the device display when it is in its default orientation.</td>
</tr>
<tr>
<td>%%DEV_FLASH_CAPABLE%%</td>
<td>Specifies whether the device is capable of running Flash.</td>
</tr>
<tr>
<td>%%DEV_HTML_AUDIO%%</td>
<td>Specifies whether the device supports HTML5 audio.</td>
</tr>
<tr>
<td>%%DEV_HTML_VIDEO%%</td>
<td>Specifies whether the device supports HTML5 video.</td>
</tr>
<tr>
<td>%%DEV_OS%%</td>
<td>The device's operating system, such as Android or iOS.</td>
</tr>
<tr>
<td>%%DURATIONHMS%%</td>
<td>The display duration for the ad in HH:MM:SS format (for example, 01:30:00 indicates 1 hour and 30 minutes).</td>
</tr>
<tr>
<td>%%DURATIONS%%</td>
<td>The display duration for the ad in seconds (for example, 60).</td>
</tr>
<tr>
<td>%%EXTRAHTML%%</td>
<td>When the token is present in a creative template, the string is replaced with network beacons and snippets that would otherwise have been appended to the end of the creative. When the token is not present, the beacons and snippets are appended to the end of the creative.</td>
</tr>
<tr>
<td>%%FCID%%</td>
<td>The unique flight creative ID, or FCID, value that links the creative to a flight.</td>
</tr>
<tr>
<td>%%FLIGHTID%%</td>
<td>The unique integer value that identifies a flight.</td>
</tr>
<tr>
<td>%%FLTUINFO%%</td>
<td>The information that was entered in the User info field in the Description panel of the Edit Flight window.</td>
</tr>
<tr>
<td>%%FLIGHT_NAME%%</td>
<td>The name of the flight. This token is available if the FlightTokensEnabled setting is enabled. Contact SAS Technical Support to configure the setting.</td>
</tr>
<tr>
<td>%%GENERIC%%</td>
<td>The string that is passed in on an ad call between the /generic= string and the next forward slash (/).</td>
</tr>
<tr>
<td>%%GEO_CITY%%</td>
<td>The visitor's city.</td>
</tr>
<tr>
<td>Token</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>%%GEO_CONN_SPEED%%</td>
<td>The visitor's connection speed.</td>
</tr>
<tr>
<td>%%GEO_COUNTRY%%</td>
<td>The visitor's country.</td>
</tr>
<tr>
<td>%%GEO_IP%%</td>
<td>The visitor's IP address.</td>
</tr>
<tr>
<td>%%GEO_METRO_CODE%%</td>
<td>The visitor's metro area.</td>
</tr>
<tr>
<td>%%GEO_REGION%%</td>
<td>The visitor's region (state or province).</td>
</tr>
<tr>
<td>%%GEO_ZIP_CODE_TEXT%%</td>
<td>The visitor's ZIP code.</td>
</tr>
<tr>
<td>%%HEIGHT%%</td>
<td>The height of the creative when it is assigned a size.</td>
</tr>
<tr>
<td>%%HTTP%%</td>
<td>The protocol that is used for the request. Valid values are http or https, as appropriate.</td>
</tr>
<tr>
<td>%%IPADDRESS%%</td>
<td>The visitor's IP address.</td>
</tr>
<tr>
<td>%%MEDIA%%</td>
<td>The string that is entered in the Media field for a creative.</td>
</tr>
<tr>
<td>%%MID%%</td>
<td>The visitor's SAS 360 Match cookie value.</td>
</tr>
<tr>
<td>%%ORIGIN%%</td>
<td>The value of the Origin header. It is used for CORS (Cross-Origin-Resource-Sharing) requests.</td>
</tr>
<tr>
<td>%%PATH%%</td>
<td>The path information string that is passed in on an ad call between http:// and question mark (?) in the URL.</td>
</tr>
<tr>
<td>%%PRECLICKURL%%</td>
<td>The click URL that points to the SAS 360 Match ad server for click counting followed by the string relocate=. This string enables a click URL to be appended so that SAS 360 Match can issue a relocate URL. It is useful for third-party ad servers who want to append a click destination while enabling SAS 360 Match to count the click.</td>
</tr>
<tr>
<td>%%PRODUCT_ID%%</td>
<td>The product ID. Note: This value is not available by default. Contact SAS Technical Support to enable it.</td>
</tr>
</tbody>
</table>
## Predefined Tokens

<table>
<thead>
<tr>
<th>Token</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%%PRODUCT_NAME%%</td>
<td>The product name. Note: This value is not available by default. Contact SAS Technical Support to enable it.</td>
</tr>
<tr>
<td>%%QUERY%%</td>
<td>The query string that is passed in on an ad call after the question mark (?) in the URL.</td>
</tr>
<tr>
<td>%%RANDOM%%</td>
<td>The random number that is passed in on an ad call after the /random= string.</td>
</tr>
<tr>
<td>%%REFERER%%</td>
<td>The URL of the page that contains the ad call URL.</td>
</tr>
<tr>
<td>%%SIZE%%</td>
<td>The size value that is sent in an ad request, for example &quot;300x250&quot;.</td>
</tr>
<tr>
<td>%%SUPERTAG%%</td>
<td>The supertag value that is passed in on an ad call.</td>
</tr>
<tr>
<td>%%TIERNAME%%</td>
<td>The name of the tier the partner is competing on.</td>
</tr>
<tr>
<td>%%TIME%%</td>
<td>The time value that is passed in after the /time= tag in an ad call.</td>
</tr>
</tbody>
</table>
A format that can extract data from a value with a JSON structure. In this token:

- **TOKENNAME** is the name of the token. The token might be followed by additional formatting options. If the token value is not a valid JSON structure, the format returns an empty string.
- **JSONEX** is the name of the formatting option to use to extract JSON data.
- **path.to.element** is the path to the element to extract from the JSON structure. This path is case-sensitive.
  - If the element does not exist at the specified path, the format produces an empty string.
  - If the element exists but is a nonterminal node in the JSON structure, a JSON representation of that node is returned.

For a token named EMP with the following values:

```json
{
    "name": "Smith",
    "employer": {
        "name": "SAS",
        "city": "Cary"
    },
    "children": [
        "Sally",
        "Roger"
    ]
}
```

- %%EMP%% returns the entire JSON string.
- %%EMP:JSONEX,name%% returns "Smith".
- %%EMP:JSONEX,employer.name%% returns "SAS".
- %%EMP:JSONEX,employer.city%% returns "Cary".
- %%EMP:JSONEX,employer.state%% returns an empty string because the element does not exist.
- %%EMP:JSONEX.employer%% returns 
  
- %%EMP:JSONEX.children%% returns 
  
- %%EMP:JSONEX.children%% returns 


<table>
<thead>
<tr>
<th>Token</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%%USERAGENT%%</td>
<td>The user agent string that is passed via the HTTP request header for an ad call.</td>
</tr>
</tbody>
</table>
| %%VERICOUNTURL%% | The URL that is added to the creative code returned to the page that instructs SAS 360 Match to increment the impression count.  
**Note:** This token includes the `img src=` HTML tag prepended to the URL. |
| %%VIEWABILITYPERCENT%% | The percent of the ad that the viewer must see in order for the view to be counted. The default value is 50%. You can configure this value. |
| %%VIEWABILITYTIME%% | The amount of time required to view an ad for the view to be counted. The default value is 1,000 milliseconds (1 second). You can configure this value. |
| %%VIEWABILITYURL%% | The beacon URL that is automatically created by SAS 360 Match to increment the viewed count. |
| %%WIDTH%% | The width of the creative when it is assigned a size. |

If you create a field for a creative template, a corresponding custom token is also created. Custom tokens are prepended with `X_` unless you selected the Media check box. If you selected the Media check box, the token name matches the name of the field that you created. For more information, see "Add a Creative Format" on page 83.

You can create a dynamic token to replace a string in the creative code content. For example, an ad call can pass in a key=value pair such as `/toys=boardgame` in the URL. The creative content can then use the token `%TOYS%` to get the associated value `boardgame`:

```
<a href="%%CLICKURL%%?%%TOYS%%"><img src="%%MEDIA%%" width=728 height=90></a>
```

where `%%TOYS%%` is replaced by `boardgame` in the query string of the click URL.

Tokens that reference tags that specify multiple values (for example, `/SITE=A,B,C`) can reference a specific value. The syntax for these tokens is `%%TOKEN:+1%%` or `%%TOKEN:-1%%` (the plus and minus signs are required). Starting from 0, the specified number determines which value in the comma-separated list is returned. Negative numbers reference the values that are relative to the end of the list. For example, `+1` returns the second value (or `B` in this example), and `-1` returns the last value (or `C`).
Note: To specify a default value in the token that is used when no other value is provided, enter `%%TOKEN:?"default value"%%`. You can also set default values (for example, enter `%%TOKEN:?"%%OTHER:?"default for the default"%%`).

Use the `%%MATCH.tagname%%` token to identify the tag value from the list of comma-separated values that was used to find a match for the creative delivered. For the `%%MATCH.tagname%%` token, `tagname` is the name of the tag to use. For example, if an ad request contains `/SITE=A,B,C`, and the flight creative that delivered was targeted to SITE=B, `%%MATCH.site%%` would return a value of B. Individual values in a multivalue tag match can be referenced using the `:+index` suffix.

Note: Tracking matched tag values must be enabled on for each tag through a customer configuration setting.

Use `%%token:regularExpression, matchString, replacementString%%` to change the value of any token, such as network creative URLs, network creative responses, and creative templates. The match and replacement strings are comma-delimited after the `regularExpression`. If `,`, `,`, or `,` are needed within the match or replacement strings, they must be URL encoded as `%25`, `%3A`, and `%2C`, respectively.
Managing Snippets

About Snippets

Snippets are user-defined sections of code that are appended to ad responses. Typically, these snippets would be third-party beacons but can consist of any text or code. By default, a code snippet delivers with all ad responses, except for TSERVER requests. Snippets can be targeted so that they serve only to responses that match the applied targeting. Code snippets are accessed on the Snippets subtab.

The subtab lists all the snippets that are available, including those that are managed by SAS 360 Match. System snippets are identified by the System Record column in the table that lists all the snippets. System snippets can be viewed and enabled or disabled, but they cannot be edited or deleted.

Add a Snippet

1. On the top navigation bar, click the Assets tab.
2. Click the Snippets subtab.
3. Click + Snippet.
4. To activate the snippet, select Active.
5 In the **Template type** field, select **Upload** or **Text**.

6 If you selected the **Upload** template type, click **Choose File**, navigate to the file that you want to upload, and then click **Open**.

7 If you selected the **Text** template type, follow these steps:
   a  Enter information in the **File Name** field.

   Note: You can enter only letters, numbers, hyphens, and underscores

   b  From the **MIME Type** list, select **application_javascript (application/javascript)**, **text_html (text/html)**, or **text_javascript (text/javascript)**.

   To create a MIME type, follow the instructions in “Add a MIME Type” on page 91.

   c  Enter the snippet text in the **Template Text** box.

8 Select a **Target** so that the snippet serves to only responses that match the target.

9 Click **Add Snippet**.

---

## Edit a Snippet

1 On the top navigation bar, click the **Assets** tab.

2 Click the **Snippets** subtab.

3 In the row for the snippet, select the file name or click 📂. The Edit Snippet page appears.

4 In the **Template type** field, select **Upload** or **Text**.

5 If you selected the **Upload** template type, click **Choose File**, navigate to the file that you want to upload, and then click **Open**.

6 If you selected the **Text** template type, follow these steps:
   a  Enter information in the **File Name** field.

   Note: You can enter only letters, numbers, hyphens, and underscores

   b  From the **MIME Type** list, select **application_javascript (application/javascript)**, **text_html (text/html)**, or **text_javascript (text/javascript)**.

   To create a MIME type, follow the instructions in “Add a MIME Type” on page 91.

   c  Enter the snippet text in the **Template Text** box.
Select a Target so that the snippet serves to only responses that match the target.

Click Update.

Note: You can click to duplicate and modify an existing snippet, including system snippets. Copied snippets are inactive by default.

Delete a Snippet

1. On the top navigation bar, click the Assets tab.
2. Click the Snippets subtab.
3. In the row for the snippet, click and then click OK.
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About RFPs

Request for proposals (RFPs) are entered in the system with data from the Advertiser. After an RFP is entered into the system, multiple proposals can be generated for the RFP.

Add an RFP

1. On the top navigation bar, click the Sales tab.
2. Click the RFPs subtab.
3. Click + Add New RFP.
4. Enter information in the Name field.

Note: You can enter only alphanumeric characters (a–z, A–Z, 0–9), special characters (~@#$%^&*()-[]{}<>"'`=|), spaces, underscores, and punctuation marks (!.,?;:).
5 In the **RFP Details** field, select **Upload** or **Text**.
   - If you selected **Upload**, click **Choose File**, navigate to the file that you want to upload, and then click **Open**.
   - If you selected **Text**, enter information in the box.

6 In the **Advertiser** field, enter the first few letters of the advertiser’s name and then select the advertiser from the list. If you want to send the RFP to a new advertiser, click **Add a new advertiser**.
   
   Note: Enter % if you want to display the full list of advertisers.

7 If you want the selected advertiser to be billed, click **Bill to Advertiser**.

8 In the **Agency** field, enter the first few letters of an agency’s name and then select the agency from the list. If you want to send the RFP to a new agency, click **Add a new agency**.
   
   Note: Enter % if you want to display the full list of agencies.

9 If you want the selected advertiser to be billed, click **Bill to Agency**.

10 In the **Billing Contact** field, enter the first few letters of a billing contact’s name and then select the billing contact from the list. If you want to create a new billing contact, click **Add a billing contact**.
   
   Note: Enter % if you want to display the full list of billing contacts.

11 Enter a value in the **Budget $** field.

12 Select a **Salesperson** from the list.

13 Enter information in the **Notes** field.

14 Click **Save and Create Proposal** or **Add RFP** if you want to create more RFPs and build the proposal later.

---

**View an RFP**

1 On the top navigation bar, click the **Sales** tab.

2 Click the **RFPs** subtab.

3 You can view different groupings of your RFPs:
   - To view a specific RFP, click in the row for the RFP.
     
     To add a proposal, click **Add New Proposal** and then follow the instructions in “Add an RFP” on page 157.
   - To view the RFPs for your team, click **View Team RFPs**.
To view the RFPs that belong to you, click View My RFPs.

Edit an RFP

1. On the top navigation bar, click the Sales tab.
2. Click the RFPs subtab.
3. Click the RFP name or click in the row for the RFP.
4. Modify the information in the Name field.
5. In the RFP Details field, select Upload or Text.
   - If you selected Upload, click Choose File, navigate to the file that you want to upload, and then click Open.
   - If you selected Text, modify the information in the box.
6. In the Advertiser field, enter the first few letters of an advertiser’s name and then select the advertiser from the list. If you want to send the RFP to a new advertiser, click Add a new advertiser.

   Note: Enter % if you want to display the full list of advertisers.

7. If you want the selected advertiser to be billed, click Bill to Advertiser.
8. In the Agency field, enter the first few letters of an agency’s name and then select the advertiser from the list. If you want to send the RFP to a new agency, click Add a new agency.

   Note: Enter % if you want to display the full list of agencies.

   If you want the selected advertiser to be billed, click Bill to Agency.
9. In the Billing Contact field, enter the first few letters of a billing contact’s name and then select the billing contact from the autosearch results. If you want to create a new billing contact, click Add a billing contact.

   Note: Enter % if you want to display the full list of billing contacts.
10. Enter a value in the Budget $ field.
11. Select a Salesperson from the list.
12. Enter information in the Notes field.
13. Click Update.
Delete an RFP

1. On the top navigation bar, click the Sales tab.
2. Click the RFPs subtab.
3. In the row for an RFP, click \[
\]
   and then click OK.
Managing Proposals

About Proposals

Proposals are responses to RFPs, although proposals can be created without being associated with an RFP. If proposals are accepted, they are used to generate campaigns. Every time a proposal is edited, the previous version is saved, and can be accessed by clicking the number in the Version column on the Proposals tab.

Before a proposal can be converted into a campaign and flights, both the proposal and line items go through a set of checks to ensure they are set up correctly and are not violating any rules. This is referred to as compliance, and a proposal cannot be converted unless both the proposal and line items are found to be compliant.

Proposal compliance is based on the following:

- An advertiser credit check. If the advertiser has specified a credit limit, the proposal is not considered compliant unless the total cost of the proposal and total costs of the current flights for the advertiser are below this limit.
- Total proposal cost. The total proposal cost must not exceed the Proposal high value threshold, which is set under the Settings tab in the Sales section.
- An advertiser must be selected in a proposal or its RFP.

Line item compliance is based on the following:
A price check and inventory check. The specified floor rate of the product is checked against the total revenue based on the specified flat rate or CPM of the line item. If the revenue is lower than the floor rate, then the line item is not considered compliant.

A check is performed if a line item uses a restricted product.

Any changes to an already-converted line item results in a check.

Line item start date is not before today.

Line item start date or end date is not outside the proposal’s date range.

Add a Proposal

1. On the top navigation bar, click the Sales tab.
2. Click the Proposals subtab.
3. Click + Add New Proposal.
4. To associate the proposal with an RFP, enter the first few letters of an RFP in the RFP field and then select the RFP from the list.
   
   Note: Enter % if you want to display the full list of RFPs.
5. Enter information in the Name field.

   Note: You can enter only alphanumeric characters (a–z, A–Z, 0–9), special characters (~@#$%^&*()-[]\{}|<>"\'='), spaces, underscores, and punctuation marks (.,,:).
6. Select an Insertion Order Logo from the list.
7. In the Insertion Order Template list, select Default or Custom.
8. Select an Insertion Order Locale from the list.

   Note: Not all templates support the locale setting. The selected locale might have no effect on the template.
9. In the Terms and conditions field, enter the first few letters for terms and conditions and then select terms and conditions from the list.

   Note: Enter % if you want to display the full list of terms and conditions.
10. Click the Expiration date field and select a date in the calendar that appears.
11. Click the Start date field and select a date in the calendar that appears.
12. Click the End date field and select a date in the calendar that appears.
13 Select a Currency from the list.

14 In the Advertiser field, enter the first few letters of the advertiser’s name and then select the advertiser from the list. If you want to associate the proposal with a new advertiser, click Add a new advertiser or Add a new contact. Repeat this step for every advertiser that you would like to add.

Note: Enter % if you want to display the full list of advertisers.

15 If you want the selected advertiser to be billed, select Bill to Advertiser.

16 Enter information in the Advertiser Contact field. The billing contact is chosen automatically by using the first billing contact found for the advertiser depending on which is selected for Bill To. If there is none, then the advertiser contact specified on the proposal is used. If not specified, then the first primary contact found for the advertiser is used. This field allows a contact to be specified for billing details in the proposal export instead of being chosen automatically.

17 Enter information in the Advertiser Billing Contact field.

18 In the Agency field, enter the first few letters of an agency’s name and then select the agency from the list. If you want to associate the proposal with a new agency, click Add a new agency.

Note: Enter % if you want to display the full list of agencies.

19 If you want the selected advertiser to be billed, select Bill to Agency.

20 Enter information in the Agency Contact field.

21 Enter information in the Agency Billing Contact field. The billing contact is chosen automatically by using the first billing contact found for the agency depending on which is selected for Bill To. If there is none, then the Agency Contact specified on the proposal is used. If not specified, then the first primary contact found for the agency is used. This field allows a contact to be specified for billing details in the proposal export instead of being chosen automatically.

22 Select a Salesperson from the list.

23 Select a Trafficker from the list. You can also select a second trafficker.

24 Enter a percentage value in the Discount field.

25 Enter information in the External ID field.

26 Enter information in the PO Number field.

27 Select a value from the Probability to Campaign list.

This option sets a percentage indicating the likelihood that the proposal will be accepted and generated into a campaign. If the value is set at 90% or higher, the proposal and line items are included as reserved impressions in forecasts. The default value is 90% and can be configured by contacting SAS Technical Support at support@sas.com.

28 (Optional) Enter information in the Advertiser Notes field. The notes are also viewable in the campaign, line item, and flight associated with this proposal.
Note: By default, this setting is disabled and the field is hidden. To use this field, contact SAS Technical Support.

29 Enter information in the Notes field.

30 Enter information in the Internal Notes field.

31 Select an Asset to associate with the proposal.

32 Click Create Proposal, or select Create Proposal & Edit or Create Proposal & Copy from the list.

View a Proposal

1 On the top navigation bar, click the Sales tab.

2 Click the Proposals subtab.

3 Click in the row for the proposal.

4 (Optional) You can choose to see only the proposals for your team or your own proposals.
   - To view the proposals for your team, click View Team Proposals.
   - To view the proposals that belong to you, click View My Proposals.

5 From here you can click View History to view the history of the proposal, Convert to Campaign to convert the proposal into a campaign (see “Convert a Proposal” on page 170 for more information), Edit Proposal to edit the proposal, Export Proposal to export the raw, unformatted proposal data into an XLSX file, or Export PDF to export the proposal into a PDF file.

6 If you want to add a line item, click + Add New Line Item and then follow the instructions in “Add a Line Item” on page 164.

Add a Line Item

1 Enter information in the Name field.

2 Enter the insertion order information in the IO Id field.

3 Select the Time Zone.

4 Select a Start date and Time for the line item.

5 Select an End date and Time for when the line item should end.
6 Select a **Currency** from the list.

7 To assign a product that contains targeting demographics tied with revenue data to the line item, enter information in the **Product** field. To filter the list of products, click **search** and then do the following:

   a Select **Match All** or **Match Any**.

   b In the **Sites** field, enter the first few letters of a site’s name and then select the site from the list.

      Note: Enter % if you want to display the full list of sites.

   c In the **Areas** field, enter the first few letters of a site’s name and then select the site from the list.

      Note: Enter % if you want to display the full list of areas.

   d Click **Apply Filter**.

8 Select a **Product Line** category from the list. This value is used for reporting purposes.

   Note:

   Contact SAS Technical Support at support@sas.com to enable the product line option and to specify the categories for product lines.

9 From the **Size** list, select an ad size.

10 Enter a value in the **Additional fees $** field and add a **Fee description**.

11 (Optional) Set a price adjustment for the flat rate or the CPM rate.

   Note: This field is disabled by default. Contact SAS Technical Support at support@sas.com to enable this option.

   a Select an **Adjustment Type** to change the rate.

      - If the adjustment type is **Currency ($ CPM)**, an absolute adjustment is made to the rate. This option works if only one CPM rate is defined.

      - If the adjustment type is **Percent**, the adjustment is applied to all the costs that have been defined.

   b In **Adjustment Amount**, use + to increase the cost and – for a discount.

   c Add an **Adjustment description**.

   Note: When specified, discounts for the advertiser and product, as well as the agency year-end discount, are always applied. The agency standard discount and commission are applied if the product is configured to enable those values to be applied. Adjustments and discounts are included in eCPM calculations for tier prioritization and bidding.
Multiple discounts are applied individually not cumulatively. For example, a 10% advertiser discount and a 10% product discount are applied one at a time. The final discount does not add up to a 20% discount.

12 **A Conversion Rate** appears if the currency for the line item is not the base currency and has a conversion rate set. For each line item, the conversion rate specifies how many units of the currency are equivalent to one unit of the base currency.

*Note:* The default conversion rate is **1.0**. Specify conversion rates in **Admin ➔ Currency**.

13 The value for **Conversion Status** is **Converted** if the line item has been converted to a flight and **Not Converted** if the line item has not been converted to a flight.

14 Click on **View** to display **Projected Impressions**.

*Note:* Projected impressions are available only when the line item is above the threshold for conversion to a campaign.

15 In the **Goals & Revenue** panel, do one of the following:

- To apply a flat rate revenue to the flight, select **Flat Rate** and then do the following:
  - Enter a value in the **Flat Rate** field. The revenue is calculated by the amount entered not per impression.
  - Enter a value in the **Goal** field for impressions, views, clicks, and actions. The flight attempts to serve enough to meet the goals specified in the fields in the time specified and as evenly as possible. When the goals are reached, the flight stops serving. A views goal can be set on flights when the viewability feature is enabled for the page where the flight is serving.
  - Enter a value in the **Bonus** field for impressions, views, clicks, and actions. Revenue is not applied to bonus amounts. The amounts are treated as part of the overall goal by the ad server.

- To apply a cost to every thousandth instance of an impression, click, or action, select **Cost Per** and then do the following:
  - Enter a value in the **Cost Per** field for the clicks per thousand for impressions, and cost per single views, clicks, and actions.

  Enter a value in the **Cost Per** field for the **Daily Revenue Cap**. The flight serves normally each day until reaching the revenue amount that is specified in this field.

  The **Daily Revenue Cap** limits a flight’s impressions when a specified revenue cap is reached each day. Revenue is calculated using the **Cost Per** values for impressions, clicks, and actions, along with the current day’s impressions, clicks, and actions. A flight serves impressions regularly according to its priority and serving rate until the revenue cap is reached for the 24-hour period that begins at midnight. When the daily revenue limit is reached, the flight is not eligible to serve again until the flight's revenue is reset to zero at midnight for a new 24-hour period.
For example, setting **Cost Per** for impressions to 1.0 means that the revenue for 1,000 impressions is $1. If **Daily Revenue Cap** is 10.0, the flight can serve up to 10,000 flights per day.

The **Daily Revenue Cap** overrides engine priority. Even if a flight is behind schedule, the revenue cap is maintained. If the cap is set too strictly, the flight might not meet its goal. However, the revenue cap cannot force a flight to over serve, so a flight will never get ahead of schedule because of the cap.

---

**Note:** The revenues that are shown in reports reflect the values that you use. You do not have to specify real-world values for the flight to be capped daily, but the report revenues are not accurate if you do not use real-world values. In many cases, the flights cannot match the daily revenue cap exactly, so flights might be slightly over or under served.

- Enter a value in the **Goal** field for impressions, views, clicks, and actions. The flight attempts to serve enough to meet the goals specified in the fields. When the goals are reached, the flight stops serving. A views goal can be set on flights when the viewability feature is enabled for the page where the flight is serving.

- Enter a value in the **Bonus** field for impressions, views, clicks, and actions. Revenue is not applied to bonus amounts. The amounts are treated as part of the overall goal by the ad server.

The effective cost per thousand, or **ECP**, is automatically calculated and displayed in the table.

---

16 In the **Inventory** panel, click **Available** to perform an ad hoc inventory projection using the product specified on the flight. To include contending flights in the inventory projection, click **Contending Flights**. To set a goal for the inventory, click **Set Goal** and then enter a value.

17 The **Uplifts** panel displays the list rate associated with the line item. The uplift is applied whenever the tag is added to a line item. For more information, see “About Uplifts” on page 183.

18 Use the **Frequency Caps** panel to set options that affect the frequency limits for impressions, views, clicks, or conversions.

- Enter a value in the **Quantity** field to specify the number of impressions, views, clicks, or conversions to serve to a visitor.

- Enter a value in the **Period** field to specify the period of time that must elapse after the quantity is reached for impressions, views, clicks, or conversions before a visitor is eligible to receive the flight again. For example, if you enter 3 in the **Quantity** field and 1 week in the **Period** field, once a flight is shown three times to a visitor, the flight is not shown again to the visitor until after a one-week waiting period.

---

**Note:** You must enter an integer value in the **Period** field. For example, enter 1 hour instead of hour. A per day period indicates a calendar day that runs from midnight of one day to midnight of the next day instead of a 24-hour time span. A month indicates 30 days instead of the actual number of days of a specific month.
Enter a value in the **Over Lifetime** field to specify the number of impressions, views, clicks, or conversions to serve to a visitor over the lifetime of the flight.

Enter a value in the **Per Session** field to specify the number of impressions, views, clicks, or conversions to serve to a visitor over the course of a visitor session. A visitor session is initiated whenever an ad request is made, and then, by default, persists for 30 minutes after the visitor’s last request.

For more information, see “About Frequency Capping” on page 83.

19 To make changes to targets, rules, tags, sites and areas, and categories, click **Show** in the **Advanced** panel, and then do the following:

a In the **Targets** panel, do the following

i Select **Match All** or **Match Any**.

- **Match All** is the equivalent of using the Boolean AND operator. All statements must be true for the target to match and the flight to serve.
- **Match Any** is the equivalent of using the Boolean OR operator. If any of the statements are true, the target matches and the flight is served.

ii In the **Targets** field, search for and select a target. Define targets in **Targeting ⇒ Targets**. For more information, see “About Targets” on page 95.

b In the **Rules** panel, do the following:

i Select **Match All**, **Match Any**, **Don’t Match All**, or **Don’t Match Any**.

This global operator applies to all the target types that are specified in this section. For more information, see “Defining Targets” on page 96.

ii Define your key and value pairs.

---

Note: The target definition string is limited to 32,731 bytes. The string is the concatenation of the rules from the target_rules table, which is stored in the definition field of the targets table.

i Specify the target type in the text field on the left. As you type, a drop-down list of matching key names and target types is displayed. Select an existing entry or create a new target type. All target type names are converted to uppercase. Names for target types that you create cannot contain spaces or Unicode.

ii Select an operator to define the relationship between the target type on the left and the value on the right.

---

Note: The operators that are available depend on the target type that is selected on the left.

i In the text field on the right, enter the value that is related to the target type on the left. This field is limited to 32,680 bytes.

ii To add more target types, click ➕

iii To create groupings of the key and value pairs, click ➔ on an empty row. The operator in the group applies to the key/value pairs in the group and overrides the global operator.
In the **Tags** panel, do the following:

1. Click the **Custom**, **Geo**, or **Device** tab.
2. Select a tag name from the list and existing tag values. Click **Add new tag values** to create new tag values.
3. Click **Add Tag**.

   **Note:** If you select multiple tag values for one tag, the flight is served if any of the tag values match. If you select multiple tags, every tag and at least one value from each tag has to match in order for the flight to serve.

In the **Sites & Areas** panel, do the following:

1. To specify sites that the flight can serve to, select **Selected Sites**, place your mouse pointer in the **Sites** field, search for sites, and then select them. To add a site that the flight can serve to, click **Add a new site**, enter information in the required **Name** field, and in the optional **Description** and **Revenue cut** fields, and then click **Add Site**.

2. To specify areas that the flight can serve to, select **Selected Areas**, place your mouse pointer in the **Areas** field, search for areas, and then select them. To add an area that the flight can serve to, click **Add a new area**, enter information in the required **Name** field and the optional **Sites** field, and then click **Add Area**.

In the **Categories** panel, enter the first few letters of a category’s name and then select the site from the list.

   **Note:** Enter % if you want to display the full list of categories.

You can click **Add New Label** or **Add Label Value**. For more information, see “About Labels” on page 65.

In the **Billable amount by month** section, choose a **Billable Distribution** for the monthly billing amount.

   **Note:** By default, the cost per month is calculated using the weighted distribution.

The options for **Billable Distribution** are as follows:

- **As Is or Edit**: Manually set the billable amount for each month. If this option is checked, the total cost per month is not updated when CPM and goals change.

   **Note:** After updating a line item, this value is checked.

- **Weighted**: Each month’s costs is based on the number of days in that month.

- **Even by Month**: Each month is billed the same amount.

- **All at End**: The last month is assigned the total cost.

- **All at Front**: The first month is assigned the total cost.
21 In the **Other** panel, enter information in the **Notes** and **External ID** fields.

22 Click **Create Line Item** or click the down arrow next to **Create Line Item** and click **Create Line Item & Split By Month**, **Create Line Item & Add Another**, **Create Line Item & Add Go To Next**, **Create Line Item & Copy**, or **Create Line Item & Make Many Copies**.

---

**Convert a Proposal**

Before a proposal can be converted into a campaign and flights, both the proposal and line items go through a set of checks to ensure they are set up correctly and are not violating any rules. This is referred to as compliance, and a proposal cannot be converted unless both the proposal and line items are found to be compliant. Any outstanding triggered alerts that require acknowledgment or approval prevent a proposal from being converted.

If the proposal and line items are compliant, a **Convert to Campaign** button appears on the View Proposal page. Click this button to create a campaign and flights with the information from the proposal and line items. Once converted, a link to the converted campaign is shown on the View Proposal page.

If the proposal or line item fields are edited, it might be necessary to reconvert the proposal. You can select the line items to reconvert. If the edits require reconversion, the **Convert to Campaign** button reappears on the View Proposal page.

After converting a proposal that contains line items, you can make additional changes to the proposal and line items. To keep parity with the associated campaign and flights, you must reconvert the proposal. If any separate changes were made to the associated campaign or flights, those changes might be overwritten during reconversion. When you reconvert a proposal, the following fields are updated in the associated campaign:

- **Name**
- **Notes**
- **External ID**
- **Start Date**
- **End Date**
- **Advertiser**
- **Agency**
- **Salesperson**
- **Trafficker**
- **Product**
- **Campaign Type**, which is changed to **Guaranteed**

If the associated flights have no creatives, the following fields are updated:

- **Name**
- **Start Date**
Edit a Proposal

1. On the top navigation bar, click the **Sales** tab.
2. Click the **Proposals** subtab.
3. Click the proposal name or click ![icon](in the row for the proposal.
4. To make changes:
   - To associate the proposal with an RFP, enter the first few letters of an RFP in the RFP field and then select the RFP from the list.
   
     **Note:** Enter % if you want to display the full list of RFPs.
   
   - Modify the information in the **Name** field.
   - Select an **Insertion Order Logo** from the list.
   - From the **Insertion Order Template** list, select **Default** or **Custom**.
   - Select an **Insertion Order Locale** from the list.
   
     **Note:** Not all templates support the locale setting. The selected locale might have no effect on the template.
In the **Terms and conditions** field, enter the first few letters for terms and conditions and then select terms and conditions from the list.

**Note:** Enter % if you want to display the full list of terms and conditions.

- Click the **Expiration date** field, and then select a date in the calendar that appears.
- Place your mouse pointer in the **Start date** field, and then select a date in the calendar that appears.
- Place your mouse pointer in the **End date** field, and then select a date in the calendar that appears.
- Select a **Currency** from the list.
- In the **Advertiser** field, enter the first few letters of an advertiser’s name and then select the advertiser from the list. If you want to send the RFP to a new advertiser, click **Add a new advertiser**.

**Note:** Enter % if you want to display the full list of advertisers.

If you want the selected advertiser to be billed, click **Bill to Advertiser**.
You can also add a new contact by clicking **Add a new contact**.

- Enter information in the **Advertiser Contact** field.
- In the **Agency** field, enter the first few letters of an agency’s name and then select the advertiser from the list. If you want to send the RFP to a new agency, click **Add a new agency**.

**Note:** Enter % if you want to display the full list of agencies.

If you want the selected advertiser to be billed, click **Bill to Agency**.

- Enter information in the **Agency Contact** field.
- Select a **Salesperson** from the list.
- Select a **Trafficker** from the list. You can also select a second trafficker.
- Enter a percentage value in the **Discount** field.
- Enter information in the **External ID** field.
- Enter information in the **PO Number** field.
- Select a value from the **Probability to Campaign** list.
- Enter information in the **Notes** field.
- Enter information in the **Internal Notes** field.

5 If you want to add a line item, click **+ Add New Line Item** and then follow the instructions in “Add a Line Item” on page 164. Otherwise, continue with the next step.

6 Click **Update Proposal**, or select the arrow and click **Update Proposal & Edit** or **Update Proposal & Copy**.
Copy a Proposal

1. On the top navigation bar, click the Sales tab.
2. Click the Proposals subtab.
3. In the row for a flight, click $\text{Copy}$. 
4. Click OK. The Edit Proposal page appears.
5. Make any desired changes and then click Update Proposal.

Delete a Proposal

1. On the top navigation bar, click the Sales tab.
2. Click the Proposals subtab.
3. In the row for a proposal, click $\text{Trash}$ and then click OK.
Managing Products

About Products

Products are a combination of rate-card data tied to targets. That rate-card data consists of the list rate, goal rate, and floor rate. Tags and targets are built on key=value pairs that represent the data that is passed to SAS Intelligent Advertising for Publishers. A thorough set of keys and values (taxonomy) results in effective targets and products. This data influences real-time ad selection, can help refine your concept of audience, and improve product definitions. Products are later specified in proposals, and are assigned to flights after they are booked. Products can be reported on through the BI reporting tool, and they provide an easy way of viewing revenue against rate-card and traffic data for a target or groups of targets.

Add a Product

1. On the top navigation bar, click the Sales tab.
2. Click the Products subtab.
3. Click + Add New Product.
4 Enter information in the **Name** field.

Note: You can enter only alphanumeric characters (a–z, A–Z, 0–9), special characters (~@#$%^&*-+(){}[]|/<>'="'?), spaces, underscores, and punctuation marks (!.,?;:).

5 Enter information in the **Description** field.

6 Select a **Tier** from the list. This specifies what tier the product can be assigned to. A lower revenue or lower priority product might need to be limited to lower tiers to not interfere with flights in higher tiers.

7 If you want to restrict the product, select **Yes** next to **Restricted**.

   If you selected **Yes**, the **Alerts** panel appears. In the **Alerts users** field, type the first few letters of the contact to whom you would like to receive alerts and then select the contact from the list. Repeat this step for each contact that you would like to add. Do the same for the **Alerts teams** that you want to add.

   Note: Enter % if you want to display the full list of contacts.

   To specify the level of alerts, select **Notifications** or **Require Approval**.

8 If you want to package the product with other products, select **Yes** next to **Package**.

   Note: A package that is added to a flight does not by itself apply any targeting. Each product from the package must first be associated with a creative, and then the targeting from that product is applied to the creative.

   If you selected **Yes**, the **Products** panel appears. In the **Products** field, enter the first few letters of a product that you would like to package with the new product and then select the product from the list. Repeat this step for each product that you would like to add.

   Note: Enter % if you want to display the full list of products.

9 In the **Sizes** field, enter a value and then select a value from the list. Enter % if you want to display the full list of values.

   Note: If you are packaging the product with existing products, the **Sizes** field is not available.

10 In the **Target group logic** list, select **Match All** or **Match Any**.

   Note: If you are packaging the product with existing products, the **Target group logic** list is not available.

11 Enter information in the **Targets** field. Multiple targets can be assigned to a single product. Once a product is assigned to a flight, the targeting associated with that product determines where the flight serves.
Note: If you are packaging the product with existing products, the Targets field is not available.

12 If you want to profile the product in a summary report, select **Profile in product sum report**. When this option is disabled, this product is not included in data for the product report, which can speed up data processing time.

13 If you want the product to be the top priority, select **Top Priority**. When enabled, this option carries over to any flights that are converted from line items that use this product.

14 In the **Companion type** list, select **None**, **Strict**, or **Loose**. When the setting is either strict or Loose, this option carries over to any flights that are converted from line items that use this product.

15 In the **Terms and conditions** field, enter the first few letters for terms and conditions and then select terms and conditions from the list.

Note: Enter % if you want to display the full list of terms and conditions.

16 Select a **Product Line** category from the list. This value is used for reporting purposes.

Note:
Contact SAS Technical Support at support@sas.com to enable the product line option and to specify the categories for product lines.

17 In the **Additional Targeting** field, select **Dynamic**, **Ad-hoc**, or **None**.

- If you select **Dynamic**, then you must select a target from the list and then click **Add Dynamic Target**. Repeat this step for all the dynamic targets that you would like to add.

  Note: Use dynamic targeting for instances where targeting is complex or granular (for example, the product is intended to target ZIP codes). No values are selected. Only the tag itself is selected for the product.

- If you select **Ad-hoc**, follow these steps:
  - To specify sites for the product, select **Selected Sites**, place your mouse pointer in the **Sites** field, search for sites, and then select them. To add a site for the product, click **Add a new site**, enter information in the required **Name** field and in the optional **Description** and **Revenue cut** fields, and then click **Add Site**.
  - To specify areas for the area, select **Selected Areas**, place your mouse pointer in the **Areas** field, search for areas, and then select them. To add an area for the product, click **Add a new area**, enter information in the required **Name** field and the optional **Sites** field, and then click **Add Area**.
  - Click the **Custom**, **Geo**, or **Device** tab. Select the tag name and then the values desired. If multiple values are selected, any of the values can match.
Select a tag name from the list and then the desired values. If you select multiple values, any of the values match.

Click Add Tag.

To add more tags, repeat these steps.

18 Enter a value in the List Rate $ field. This is the rate card price of the product from a media kit.

19 From the List Rate list, select CPM, CPC, CPA, or Flat Rate.

20 In the Additional Pricing field, select Additional rates, Discounted rates, or No additional rates.

   - If you selected Additional rates, enter values in the Floor Rate $ and Goal rate $ fields. The goal rate is the ideal price at which the product is expected to be sold, assuming discounting from the list rate. The floor rate specifies the lowest price acceptable for the product and triggers notifications or required pricing approvals if a proposal uses an eCPM below the floor rate.

   - If you selected Discounted rates, enter a value in the Discount % field to apply to the list rate.

21 Select the Apply Agency Discount check box for the agency discount to be applied along with the product discount when this product is added to a flight or a line item.

22 Select the Apply Agency Commission check box for the agency commission to be applied along with the product discount when this product is added to a flight or a line item.

23 Use the Frequency Caps panel to set options that affect the frequency limits for impressions, views, clicks, or conversions.

   - Enter a value in the Quantity field to specify the number of impressions, views, clicks, or conversions to serve to a visitor.

   - Enter a value in the Period field to specify the period of time that must elapse after the quantity is reached for impressions, views, clicks, or conversions before a visitor is eligible to receive the flight again. For example, if you enter 3 in the Quantity field and 1 week in the Period field, once a flight is shown three times to a visitor, the flight is not shown again to the visitor until after a one-week waiting period.

   Note: You must enter an integer value in the Period field. For example, enter 1 hour instead of hour. A per day period indicates a calendar day that runs from midnight of one day to midnight of the next day instead of a 24-hour time span. A month indicates 30 days instead of the actual number of days of a specific month.

   - Enter a value in the Over Lifetime field to specify the number of impressions, views, clicks, or conversions to serve to a visitor over the lifetime of the flight.

   - Enter a value in the Per Session field to specify the number of impressions, views, clicks, or conversions to serve to a visitor over the course of a visitor session. A visitor session is initiated whenever an ad request is made, and then, by default, persists for 30 minutes after the visitor’s last request.

For more information, see “About Frequency Capping” on page 83.
In the **Teams** panel, select the teams to whom you would like to assign the product.

Click **Add Product**.

---

### View Products

1. On the top navigation bar, click the **Sales** tab.
2. Click the **Products** subtab.
3. You can view different groupings of your products:
   - To view the targeting details for a product, click in the row for a product. A window appears where you can view the targeting details for the selected product.
   - To view the products for your team, click **View Team Products**.
   - To view your products, click **View My Products**.

---

### Copy a Product

1. On the top navigation bar, click the **Sales** tab.
2. Click the **Products** subtab.
3. In the row for a product, click . The Edit *product name* Product page appears.
4. Make any desired changes and then click **Update Product** or click the arrow next to **Update Product** and select **Update Product & Copy** or **Update Product & Make Many Copies**.

---

### Edit a Product

1. On the top navigation bar, click the **Sales** tab.
2. Click the **Products** subtab.
3. Click the product name or click in the row for the product.
4. To make changes:
- Modify the information in the Name field.
- Enter information in the Description field.
- Select a Tier from the list.
- If you want to restrict the product, select Yes next to Restricted.
  If you selected Yes, the Alerts panel appears. In the Alert fields, enter the first few letters of the users and teams to whom you would like to receive alerts, and then select the contact from the list. Repeat this step for each contact that you would like to add.

  Note: Enter % if you want to display the full list of contacts.

To specify the type of alerts, select Notifications or Require Approval.

- If you want to package the product with other products, select Yes next to Package.
  If you selected Yes, the Products panel appears. In the Products field, enter the first few letters of a product that you would like to package with the new product and then select the product from the list. Repeat this step for each product that you would like to add.

  Note: Enter % if you want to display the full list of products.

- In the Sizes field, enter a value and then select a value from the autosearch results. Enter % if you want to display the full list of values.

  Note: If you are packaging the product with existing products, the Sizes field is not available.

- In the Target group logic list, select Match All or Match Any.

  Note: If you are packaging the product with existing products, the Target group logic list is not available.

- Enter information in the Targets field.

  Note: If you are packaging the product with existing products, the Targets field is not available.

- If you want to profile the product in a summary report, select Profile in product sum report.
- If you want the product to be the top priority, select Top Priority.
- In the Terms and conditions field, enter the first few letters for terms and conditions and then select terms and conditions from the list.

  Note: Enter % if you want to display the full list of terms and conditions.

- Select a Product Line category from the list. This value is used for reporting purposes.
Note:

Contact SAS Technical Support at support@sas.com to enable the product line option and to specify the categories for product lines.

- In the **Additional Targeting** field, select **Dynamic**, **Ad-hoc**, or **None**.

  - If you selected **Dynamic**, select a target from the list and then click **Add Dynamic Target**. Repeat this step for as many dynamic targets that you would like to add.

  - If you select **Ad-hoc**, follow these steps for each tag that you want to add:
    - To specify sites for the product, select **Selected Sites**, place your mouse pointer in the **Sites** field, search for sites, and then select them. To add a site for the product, click **Add a new site**, enter information in the required **Name** field, and in the optional **Description** and **Revenue cut** fields, and then click **Add Site**.
    - To specify areas for the area, select **Selected Areas**, place your mouse pointer in the **Areas** field, search for areas, and then select them. To add an area for the product, click **Add a new area**, enter information in the required **Name** field and the optional **Sites** field, and then click **Add Area**.
    - Click the **Custom**, **Geo**, or **Device** tab. Select the tag name and then the values desired. If multiple values are selected, any of the values can match.
    - Select a tag name from the list and then the desired values. If you select multiple values, any of the values match.
    - Click **Add Tag**.

- Enter a value in the **List Rate $** field.

- From the **List Rate** list, select **CPM**, **CPC**, **CPA**, or **Flat Rate**.

- In the **Additional Pricing** field, select **Additional rates**, **Discounted rates**, or **No additional rates**.

  - If you selected **Additional rates**, enter values in the **Floor Rate $** and **Goal rate $** fields. The goal rate is the ideal price at which the product is expected to be sold, assuming discounting from the list rate. The floor rate specifies the lowest price acceptable for the product and triggers notifications or required pricing approvals if a proposal uses an eCPM below the floor rate.

  - If you selected **Discounted rates**, enter a value in the **Discount %** field to apply to the list rate.

- Select the **Apply Agency Discount** check box for the agency discount to be applied along with the product discount when this product is added to a flight or a line item.

- Select the **Apply Agency Commission** check box for the agency commission to be applied along with the product discount when this product is added to a flight or a line item.

- Use the **Frequency Caps** panel to set options that affect the frequency limits for impressions, views, clicks, or conversions.

  - Enter a value in the **Quantity** field to specify the number of impressions, views, clicks, or conversions to serve to a visitor.
Enter a value in the **Period** field to specify the period of time that must elapse after the quantity is reached for impressions, views, clicks, or conversions before a visitor is eligible to receive the flight again. For example, if you enter 3 in the **Quantity** field and 1 **week** in the **Period** field, once a flight is shown three times to a visitor, the flight is not shown again to the visitor until after a one-week waiting period.

**Note:** You must enter an integer value in the **Period** field. For example, enter 1 **hour** instead of **hour**. A **per day** period indicates a calendar day that runs from midnight of one day to midnight of the next day instead of a 24-hour time span. A month indicates 30 days instead of the actual number of days of a specific month.

Enter a value in the **Over Lifetime** field to specify the number of impressions, views, clicks, or conversions to serve to a visitor over the lifetime of the flight.

Enter a value in the **Per Session** field to specify the number of impressions, views, clicks, or conversions to serve to a visitor over the course of a visitor session. A visitor session is initiated whenever an ad request is made, and then, by default, persists for 30 minutes after the visitor’s last request.

For more information, see “About Frequency Capping” on page 83.

- In the **Teams** panel, select the teams to whom you would like to assign the product.
- Enter information in the **Internal Notes** field.

5 If you want to add a line item, click **+ Add New Line Item** and then follow the instructions in “Add a Line Item” on page 164. Otherwise, continue with the next step.

6 Click **Update Product** or click the arrow next to **Update Product** and select **Update Product & Copy** or **Update Product & Make Many Copies**.

---

**Delete a Product**

1 On the top navigation bar, click the **Sales** tab.

2 Click the **Products** subtab.

3 In the row for a product, click **and then click **OK**.
Managing Uplifts

About Uplifts

Uplifts consist of a tag and a list rate that can be applied to line items. Uplifts can be thought of as options that can be added to a line item that increase the value of the line item. Products or specific tag values can also be added to an uplift.

When a general uplift is created, it is applied whenever that tag is added to a line item. For example, if an uplift is created for the Age tag with a list rate of $1.00, that rate is effectively added to the floor rate of the line item when the Age tag is specified in the Tags targeting section. The tag must be applied in the Tags or Sites & Areas section in the Line Item page. The Line Item page appears after you click Show in the Advanced targeting section in the Edit Line Item window.

Add an Uplift

1. On the top navigation bar, click the Sales tab.
2. Click the Uplifts subtab.
3. Click + Add New Uplift.
4. Enter information in the Tag field.
5 Enter a value in the List Rate $ field.

6 Click **Add Uplift** or click the arrow next to **Add Uplift** and select **Add Product Uplift** or **Add Tag Value Uplift**.

7 If you selected **Add Product Uplift**, do the following:
   a Enter information in the Product field.
   b Enter a value in the List Rate $ field.
   c Click **Add Product Uplift**.

8 If you selected **Add Tag Value Uplift**, do the following:
   a Enter information in the Tag value field.
   b Enter a value in the List Rate $ field.
   c Click **Add Tag Value Uplift**.

---

**View an Uplift**

1 On the top navigation bar, click the **Sales** tab.

2 Click the **Uplifts** subtab.

3 Click in the row for the uplift.

---

**Edit an Uplift**

1 On the top navigation bar, click the **Sales** tab.

2 Click the **Uplifts** subtab.

3 Click the uplift name or click in the row for the uplift.

4 Make desired changes in the Tag and List Rate $ fields.

5 Click **Save Uplift** or click the arrow next to **Save Uplift** and select **Add Product Uplift** or **Add Tag Value Uplift**.

6 If you selected **Add Product Uplift**, do the following:
   a Enter information in the Product field.
   b Enter a value in the List Rate $ field.
   c Click **Add Product Uplift**.
If you selected **Add Tag Value Uplift**, do the following:

a. Enter information in the **Tag value** field.

b. Enter a value in the **List Rate $** field.

c. Click **Add Tag Value Uplift**.

---

**Delete an Uplift**

1. On the top navigation bar, click the **Sales** tab.

2. Click the **Uplifts** subtab.

3. In the row for an uplift, click ![edit icon] and then click **OK**.
Managing Terms and Conditions

About Terms and Conditions

Terms and conditions represent the details of a contract accompanying an insertion order. Terms and conditions can be uploaded as a PDF or text and then appended to the end of a proposal during export.

Add Terms and Conditions

1. On the top navigation bar, click the Sales tab.
2. Click the Terms and Conditions subtab.
3. Click + Add New Terms and Conditions.
4. Enter information in the Name field.

Note: You can enter only alphanumeric characters (a–z, A–Z, 0–9), special characters (~@#$%^&*(){}[]\|/<>"'='), spaces, underscores, and punctuation marks (!,?::).
5 In the Advertisers field, enter the first few letters of an advertiser’s name and then select an advertiser from the autosearch results. Repeat this step for every advertiser that would like to add.

Note: Enter % if you want to display the full list of advertisers.

6 In the Agencies field, enter the first few letters of an agency’s name and then select the agency from the autosearch results. Repeat this step for every advertiser that you would like to add.

Note: Enter % if you want to display the full list of agencies.

7 In the Template type field, select Upload or Text.
   - If you selected the Upload template type, click Choose File, navigate to the file that you want to upload, and then click Open.
   - If you selected the Text template type, enter information in the Terms and conditions text box.

8 Click Add Terms and Conditions.

---

**Edit Terms and Conditions**

1 On the top navigation bar, click the Sales tab.

2 Click the Term and Conditions subtab.

3 Click the terms and conditions name or click in the row for the terms and conditions. If you click a terms and conditions name, a sample of the verbiage is displayed, then click Edit Terms & Conditions.

4 To make changes:
   - Modify the information in the Name field.
   - In the Advertisers field, enter the first few letters of an advertiser’s name and then select an advertiser from the autosearch results. Repeat this step for every advertiser that would like to add.

   Note: Enter % if you want to display the full list of advertisers.

   - In the Agencies field, enter the first few letters of an agency’s name and then select the agency from the autosearch results. Repeat this step for every advertiser that you would like to add.

   Note: Enter % if you want to display the full list of agencies.

   - In the Template type field, select Upload or Text.
If you selected the Upload template type, click **Choose File**, navigate to the file that you want to upload, and then click **Open**.

If you selected the Text template type, enter information in the **Terms and conditions text** box.

5. Click **Update**.

---

**Delete Terms and Conditions**

1. On the top navigation bar, click the **Sales** tab.
2. Click the **Terms and Conditions** subtab.
3. In the row for the terms and conditions, click ✖️ and then click **OK**.
Checking the Availability of Inventory

About Checking Inventory Availability

SAS 360 Match enables you to search for all pre-emptible inventory in the forecast that matches the targeting and date range for flights that are in a tier with the Pre-emptible option selected. The pre-emptible inventory represents the available inventory in a simulation. You have the option to forecast the inventory for standard campaigns and for supply-side campaigns.

Forecasting and fulfillment knowledge based on capacity, booked and reserved, and available inventory data are linked so that you can accurately determine inventory availability. For more information, see Chapter 5, “Managing Tiers,” on page 45. This calculation also takes into account any default ads in the forecast that match the flight's criteria. The list of contending flights is limited to 100 flights.

When checking availability on a flight or line item, the following results are returned:

- Available is the number of impressions available to book, not including the current flight or line item's reservation. If availability is checked after the start date for the flight, then the number returned shows the availability for the remaining time period.

- Reserved is the number of impressions that the current flight or line item is projected to serve. If this check is conducted after the start date for the flight, the number returned shows what is projected for the remaining time period. The number of reserved impressions is the difference between the estimated availability and the total number of contending flights, so it might not match the number of impressions that the flight is actually forecast to serve when a frequency cap is involved.
Served is the number of impressions the flight has served through the current date.

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Check Inventory Availability

To check the availability of the inventory:

1. On the top navigation bar, click the Sales tab.
2. Click the Check Avails subtab.
3. Expand the Filters panel.
4. Select a Date Range from the list.
5. In the Break down by field, select Total, Month, Week, or Day.
6. Enter a Product. You can also filter by product site and area.

   **Note:** Use wildcard characters to refine the possible values. Use % to specify a wildcard of any length, _ to specify a wildcard of a single character, or ^<keyword> to search for the keyword at the beginning of the string.

7. Select a Size from the list.
8. To check the availability of flights for other products and to view competing flights, select Contending Flights.

   The Contending Flights tool helps you address the lack of availability for a product by providing a list of flights to which you might make changes to that could free up impression inventory.

9. To filter availability by targets, do the following:

   **Note:** You might need to click Show to display the Targets, Tags, and Sites & Areas panels.

   a. In the Targets panel, select Match All or Match Any.
   b. In the Targets field, search for and select a target.

10. To filter availability by tags, do the following:

    a. In the Tags panel, click the Custom, Geo, or Device tab.
    b. Select a tag name from the list and existing tag values. Click Add new tag values to create new tag values.
    c. Click Add Tag.
Note: If you select multiple tag values for one tag, the flight is served if any of the tag values match. If you select multiple tags, every tag and at least one value from each tag has to match in order for the flight to serve.

11 To filter availability by specific sites, select Selected Sites, click in the Sites field, search for sites, and then select them. To make a site available for future logging and inventory forecasting, click Add a new site, enter information in the required Name field, and in the optional Description and Revenue cut fields, and then click Add Site.

12 To filter availability by specific areas, select Selected Areas, click in the Areas field, search for areas, and then select them. To make an area available for future logging and inventory forecasting, click Add a new area, enter information in the required Name field and the optional Sites field, and then click Add Area.

13 To filter availability by frequency cap values in the Frequency Caps table:
   a Enter a value in the Quantity field to specify the number of impressions, clicks, or conversions to use as filters.
   b Enter a value in the Period field to specify the period of time that must elapse after the quantity is reached for the impressions, clicks, conversions to use as a filter.
   c Enter a value in the Over Lifetime field to specify the number of impressions, clicks, or conversions over the lifetime of a flight to use as a filter.
   d Enter a value in the Per Session field to specify the number of conversions over the course of a visitor session to use as a filter. A visitor session is initiated whenever an ad request is made, and, by default, persists for 30 minutes after the visitor’s last request.

14 To use schedule filters, expand the Schedule panel and then do the following:
   a Select Daily, Weekly, or Monthly.
      ■ If you selected Daily, select a value from the Run at Hour list.
      ■ If you selected Weekly or Monthly, select a value from the Run on Day and Run at Hour lists.
   b Enter a time value in the Expire in field.

15 To create an Excel file that contains the availability information, click Export xlxs.

16 To create a comma-separated file that contains the availability information, click Export csv.

17 To create a schedule report, click Schedule Report.

18 To manage schedules, click Manage Schedules.

19 Click Check Availability.

In the availability report:
   ■ Results are limited to 100 entries from flights in tiers that are not pre-emptible.
   ■ Flights that are targeted for different sites do not contend with each other.
- If you choose the contending flights option, inventory changes during the day are not included in the calculation.
- The Reserved column in the availability report is the number of impressions that are consumed by a flight from the product for the future date range that is specified by the user.
About Alerts

Alerts can be configured that notify or require action by specified users when a certain rule or condition is violated. For example, you can set up an alert that requires specified users to be notified when a price is set below floor rate, when too much inventory is allocated when submitting a line item, or when a credit limit on the proposal is violated. When you create a proposal or line item that violates a configured rule, the system requires that a notification of the violation be sent to the specified user. The proposal or line item can still be submitted. You can also specify that an approval is required before the edit is accepted.

Triggered alerts can be viewed in the Alerts tab of the My Work section. For more information, see "My Work Tab" on page 6.

Note: Alerts older than 90 days are deleted.

Types of alerts include the following:

**Change Order**

triggered when a converted line item is modified in a way that would affect the associated flight. When triggered, a pop-up dialog box appears, showing which fields on the line item were changed, what the value of the fields were when the line item was last converted, what the value of the fields are on the associated flight, and what the values of the fields on the associated flight will be if the line item is reconverted.

**Credit**

triggered if the credit limit specified for the advertiser on a proposal or line item is violated. For more information, see "Set Credit Limit" on page 205.
High Value Proposal
triggered if a proposal's value exceeds the value specified in the Proposal high value threshold field. For more information, see “About View Settings” on page 197.

Inventory
triggered when the impression goal for a line item is higher than what is calculated as available. For more information, see “About Checking Inventory Availability” on page 191.

Price
triggered if a line item is booked below the assigned product's floor price. For more information, see “About Products” on page 175.

Set Alerts

To set an alert:

1. On the top navigation bar, click the Sales tab.
2. Click the Alert Settings subtab.
3. Select a team setting from the list and then click Choose.
4. In the Alerts on violation fields for the Price, Credit, Inventory, High Value Proposal, and Change Order sections, enter the first few letters of a contact and then select contacts from the drop-down list.
5. In the Level field for the Price, Credit, Inventory, High Value Proposal, and Change Order sections, select either None, Warnings, Notifications, or Require Approval.
6. Click Save.
Setting View Options

About View Settings

In the Settings tab, you can specify certain options for the solution.

Set Options

1. On the top navigation bar, click the Sales tab.

2. Click the Settings subtab.

3. To specify a tax rate that will be included in the calculated totals for proposals exported to PDF files, enter a value in the Tax rate (%) field.

4. To make a proposal fail validation if both advertiser and agency are missing, select Proposal Save Requires Advertiser or Agency.

5. Enter information in the Business ID Label 1 and Business ID Label 2 fields if you want the advertiser and agency windows to display the fields and use the values for the labels.

6. If you want to require a business ID for the billed to advertiser or agency before an insertion order can be generated for a proposal, select Business ID Required For IO Generation.

7. If you want to require a legal entity name for the billed to advertiser or agency before an insertion order can be generated for a proposal, select Legal Entity Name Required For IO Generation.
8 If you want to require a salesperson before an insertion order can be generated for a proposal, select **Salesperson Full Name Required For IO Generation**.

9 If you want to generate a PO number, select **PO Number Auto Generation**.

10 If you want to require a PO number before an insertion order can be generated for a proposal, select **PO Number Required For IO Generation**.

11 If you want to require that all line items have end dates before an insertion order can be generated for a proposal, select **Line Item End Dates Required For IO Generation**.

12 If you want a line item name auto-generated with the product name, select **Line Item Name Auto Generated with Product Name**.

13 If you want to allow PDF exports only on proposals that can be converted to a campaign, select **Restrict PDF Export on Unconvertable Proposal**.

14 Enter information in the **Bill Direct Label** field to create a label that will be displayed in the advertiser window.

15 Enter information in the **Bill Direct Other Choice Label** field to create the label for the second radio button of the **bill direct** field in the advertiser window.

16 If you want to add a proposal logo, click **Choose File**, navigate to the desired JPEG or PNG file and then click **Open**.

17 Enter a value in the **Logo height** field so that the logo height is scaled to this value in proposal export.

Note: You cannot enter a value greater that 100.

18 In the **Proposal Template** list, select **Default** or **Custom**.

19 Select a value in the **Proposal Threshold Expiration** list to specify the number of days before a proposal expires after crossing the auto conversion threshold.

20 Select a value in the **Proposal expiration notify in days** list. This setting configures the number of days prior to a proposal’s expiration date that an expiration alert email is sent.

21 Enter a value in the **Proposal high value threshold** field using your base currency. You will receive an alert requesting approval if a proposal exceeds this threshold.

22 Select the fields that you want to propagate into the destination object during the conversion process from the **Flight Conversion Properties** list. When a field is disabled, it is not updated during conversion for the corresponding flight.

23 Click **Save**.
About Insertion Order Logos

SAS 360 Match enables you to upload and change artwork files that are placed as a logo in an advertiser’s insertion order.

Add an Insertion Order Logo

1. On the top navigation bar, click the Sales tab.
2. Click the Insertion Order Logos subtab.
3. Click + Add New Insertion Order Logo.
4. Click Choose File, navigate to a JPEG or PNG file and then click Open.
5. Click Add Insertion Order Logo.
Edit an Insertion Order Logo

1. On the top navigation bar, click the Sales tab.
2. Click the Insertion Order Logos subtab.
3. Click the insertion order logo name or click ![edit icon] in the row for the insertion order logo.
4. Click Choose File, navigate to a JPEG or PNG file and then click Open.
5. Click Update.

Delete an Insertion Order Logo

1. On the top navigation bar, click the Sales tab.
2. Click the Insertion Order Logos subtab.
3. In the row for an insertion order logo, click ![delete icon] and then click OK.
Managing Advertisers

About Advertisers

You can add as many advertisers as you like. When you add an advertiser, you need to assign it to one or more categories.

Advertiser categories prevent competing advertisers from displaying on the same page view. For example, if two advertisers are categorized as Automaker, only the first advertiser is displayed on the page view. However, an advertiser can serve more than once to a given page view, assuming that the advertiser's tier allows duplicate delivery. In other words, a categorized advertiser does not compete with itself. In this context, page view refers to a sequential set of ad calls with the same view ID.

In addition to attaching a category to an advertiser in the system, you must apply the category to the advertiser's flights so that certain flights are excluded and others are not excluded. More than one category can be applied to the advertiser and its flights. You cannot predefine categories. You add categories to an advertiser when you are creating or editing the advertiser. You can apply categories on a per-flight basis. See “About Flights” on page 39 for information about flights.
Add an Advertiser

1. Select **Customers** ➔ **Advertisers** ➔ **Add New Advertiser**.

2. Enter information in the **Name** field.

   **Note:** You can enter only alphanumeric characters (a–z, A–Z, 0–9), spaces, underscores, and hyphens.

3. Enter information in the **Legal Entity Name** field.
   
The legal entity name is used for proposal PDF file exports, and is used in cases where the name needs to contain different characters or a longer and more formal version of the advertiser name that is used in other areas of SAS 360 Match.

4. In the **Credit Limit $** field, specify a monetary limit that if exceeded creates an alert or prevents the booking of a proposal.

   **Note:** Only Finance and Administrator users can modify the **Credit Limit $** field.

5. If you want to require prepayment from the advertiser, select **Advertiser must pre-pay**.

6. In the **Standard discount (%)** field, enter a value that will be applied to exported proposal PDF files.

   **Note:** Only Finance and Administrator users can modify the **Standard discount (%)** field.

7. Select an item from the **Industry** list.
   
The BI reports group advertisers by industry. For more information about industries, see Chapter 41, “Managing Industries,” on page 217.

8. Select an item from the **Region** list.
   
The BI reports group advertisers by region. For more information about regions, see Chapter 42, “Managing Regions,” on page 219.

9. Enter a value in the **Account number** field.

10. In the **Terms and Conditions** field, enter the first few letters of a name for terms and conditions. Then select terms and conditions from the autosearch results. For more information, see Chapter 33, “Managing Terms and Conditions,” on page 187.

    **Note:** Enter % if you want to display the full list of term and conditions.
The selected terms and conditions are used by default when the advertiser is selected in a proposal.

11 Enter values in the Identification number fields.

Note: For example, enter a tax identification number, business number, or company number.

12 To set the invoicing method for the advertiser, select Direct or Agency.

13 Select a Customer Status from the list.

14 In the Custom Actions panel, enter values in the Revenue $ fields for the default actions. For more information, see Chapter 6, "Managing Custom Actions," on page 57.

If you want to delete an existing default action, click the “X” next to the action name.

15 If you want to create new actions, click + Add Action and then do the following:

a In the Action field, enter the first few letters of an action and then select the action from the autosearch results.

Note: Enter % if you want to display the full list of actions.

b Enter a value in the Revenue $ field.

c Repeat for as many actions that you would like to add.

16 In the Categories panel, enter information in the New category field and then click Add. For more information, see “About Advertisers” on page 203.

17 To add a contact for the advertiser, click Add a Contact, enter information and make selections in the Add New Contact window. Then click Add Contact.

18 Click Update.

---

**Set Credit Limit**

1 To quickly add a credit limit to an advertiser, click the Customers tab on the top navigation bar.

2 Click the Advertisers subtab.

3 Click Set Credit Limit in the row of the advertiser.

4 Enter an amount in the Credit limit field.

5 Select Advertiser must pre-pay to require pre-payment from the advertiser.

6 Click Set Credit Limit. The credit limit appears in the table.
View Advertisers

1. On the top navigation bar, click the **Customers** tab.
2. Click the **Advertisers** subtab.
3. You can view different groupings of advertisers:
   - To view a specific advertiser, click the advertiser’s name in the list.
   - To view the advertisers for your team, click **View Team Advertisers**.
   - To view the advertisers that belong to you, click **View My Advertisers**.

Edit an Advertiser

1. On the top navigation bar, click the **Customers** tab.
2. Click the **Advertisers** subtab.
3. Click the advertiser name or click ![go to advertisement](in the row for the advertiser.
4. Modify the information in the **Name** field.
   
   **Note:** You can enter only letters, numbers, hyphens, spaces, and underscores

5. Enter information in the **Legal Entity Name** field.
   
   The legal entity name is used for proposal PDF file exports. This name is used in cases where the name needs to contain different characters or a longer, more formal version of the advertiser name than is used in other areas of the user interface.

6. In the **Credit Limit $** field, specify a monetary limit that if exceeded creates an alert or prevents the booking of a proposal.
   
   You can also set the credit limit by clicking **Credit Limit** in the row for the advertiser and then entering the value in the Set Credit Limit window. You can also set the prepayment requirement for the advertiser in the Set Credit Limit window.
   
   **Note:** Only Finance and Administrator users can modify the **Credit Limit $** field.

7. If you want to require prepayment from the advertiser, select **Advertiser must pre-pay**.
8 In the **Standard discount (%)** field, enter a value that will be applied to exported proposal PDF files.

*Note:* Only Finance and Administrator users can modify the **Standard discount (%)** field.

9 Select an item from the **Industry** list.

10 Select an item from the **Region** list.

11 Enter a value in the **Account number** field.

12 In the **Terms and Conditions** field, enter the first few letters of a name for terms and conditions. Then select terms and conditions from the autosearch results.

*Note:* Enter % if you want to display the full list of term and conditions.

13 Enter values in the **Identification number** fields.

*Note:* For example, enter a tax identification number, business number, or company number.

14 To set the invoicing method for the advertiser, select **Direct** or **Agency**.

15 Select a **Customer Status** from the list.

16 In the **Custom Actions** panel, enter values in the **Revenue $** fields for the default actions.

If you want to delete an existing default action, click the X next to the action name.

17 If you want to create new actions, click **+ Add Action** and then do the following:

a In the **Action** field, enter the first few letters of an action and then select the action from the autosearch results.

*Note:* Enter % if you want to display the full list of actions.

b Enter a value in the **Revenue $** field.

c Repeat for as many actions that you would like to add.

18 In the **Category** panel, enter information in the **New category** field and then click **Add**. For more information, see “About Advertisers” on page 203.

19 To add a contact for the advertiser, click **Add a Contact**, enter information and make selections in the Add New Contact window, and then click **Add Contact**.

20 Click **Update**.
Delete an Advertiser

1. On the top navigation bar, click the Customers tab.
2. Click the Advertisers subtab.
3. In the row for an advertiser, click 🗑️ and then click OK.
Managing Agencies

About Agencies

You can add as many agencies as you like, and you can create categories for those agencies.

Add an Agency

1. On the top navigation bar, click the Customers tab.
2. Click the Agencies subtab.
3. Click Add New Agency.
4. Enter information in the Name field.
   
   Note: You can enter only alphanumeric characters (a-z, A-Z,0-9), special characters (~@#$%^&*-+(){}][<>"='), spaces, underscores, and punctuation marks (!.,?;:).

5. Enter information in the Legal Entity Name field.
The legal entity name is used for proposal PDF file exports, and is used in cases where the name needs to contain different characters or a longer, more formal version of the agency name used in other areas of SAS 360 Match.

6 In the Credit Limit $ field, specify a monetary limit that if exceeded creates an alert or prevents the booking of a proposal.  

Note: Only Finance and Administrator users can modify the Credit Limit $ field.

7 If you want to require prepayment from the agency, select Agency must prepay.

8 In the Standard discount (%) field, enter a value that will be applied to exported proposal PDF files.  

Note: Only Finance and Administrator users can modify the Standard discount (%) field.

9 Set the Year end discount (%) for the year-end payout. This discount is included in the eCPM calculation.  

Note: Only users who are assigned a role with the view or edit permissions enabled for Agency Global Discount see the Year end discount (%) field. For more information, see "About Roles".

10 In the Commission (%) field, enter a value that will be applied to exported proposal PDF files.  

Note: Only Finance and Administrator users can modify the Commission (%) field.

11 Enter an alphanumeric value in the External ID field.

12 Select an item from the Region list.

13 Enter a value in the Account number field.

14 In the Terms and Conditions field, enter the first few letters of a name for terms and conditions. Then select terms and conditions from the autosearch results.  

Note: Enter % if you want to display the full list of term and conditions.  

The selected terms and conditions are used by default when the agency is selected in a proposal.

15 Enter values in the Identification number fields.  

Note: For example, enter a tax identification number, business number, or company number.

16 Select a customer status from the list.
17 In the **Categories** panel, enter information in the **New category** field and then click **Add**. For more information, .

18 To add a contact for the agency, click **Add a Contact**, enter information and make selections in the Add New Contact window, and then click **Add Contact**.

19 Click **Update**.

---

**View an Agency**

1 On the top navigation bar, click the **Customers** tab.

2 Click the **Agencies** subtab.

3 You can view different groupings of agencies.
   - Click the agency name to view a specific agency.
   - Click **View Team Agencies** to view the agencies for your team.
   - Click **View My Agencies** to view the agencies that belong to you.

---

**Edit an Agency**

1 On the top navigation bar, click the **Customers** tab.

2 Click the **Agencies** subtab.

3 Click the agency name or click ![link](image) in the row for the agency.

4 Modify the information in the **Name** field.

5 Enter information in the **Legal Entity Name** field.
   
   The legal entity name is used for proposal PDF file exports. It is used when the name needs to contain different characters or a longer, more formal version of the agency name used in other areas of SAS 360 Match.

6 In the **Credit Limit $** field, specify a monetary limit that if exceeded creates an alert or prevents the booking of a proposal.
   
   **Note:** Only Finance and Administrator users can modify the **Credit Limit $** field.

7 If you want to require prepayment from the agency, select **Agency must pre-pay**.

8 In the **Standard discount (%)** field, enter a value that will be applied to exported proposal PDF files.
Note: Only Finance and Administrator users can modify the Standard discount (%) field.

9 In the Commission (%) field, enter a value that will be applied to exported proposal PDF files.

Note: Only Finance and Administrator users can modify the Commission (%) field.

10 Enter an alphanumeric value in the External ID field.

11 Select an item from the Region list.

12 Enter a value in the Account number field.

13 In the Terms and Conditions field, enter the first few letters of a name for terms and conditions and then select terms and conditions from the autosearch results.

Note: Enter % if you want to display the full list of term and conditions.

The selected terms and conditions are used by default when the agency is selected in a proposal.

14 Enter values in the Identification number fields.

Note: For example, enter a tax identification number, business number, or company number.

15 Select a customer status from the list.

16 In the Category panel, enter information in the New category field and then click Add. For more information, see “About Advertisers” on page 203.

17 To add a contact for the agency, click Add Contact, enter information and make selections in the Add New Contact window, and then click Add Contact.

18 Click Update.

---

Delete an Agency

1 On the top navigation bar, click the Customers tab.

2 Click the Agencies subtab.

3 In the row for an agency click and then click OK.
Managing Publishers

About Publishers

A publisher owns the website where advertisements are placed. You can create a publisher in SAS 360 Match if you want to limit reporting access. Creating publishers is useful in a network environment where you want to limit reporting access for publishers in some use cases.

Add a Publisher

1. On the top navigation bar, click the Customers tab.
2. Click the Publishers subtab.
3. Click + Add New Publisher.
4. Enter information in the Name field.

Note: You can enter only alphanumeric characters (a–z, A–Z, 0–9), spaces, underscores, and hyphens.
5 In the Sites field, enter the first few letters of a site and then select the site from the autosearch results.

Note: Enter % if you want to display the full list of sites.

6 Click Add Publisher.

---

View Publishers

1 On the top navigation bar, click the Customers tab.
2 Click the Publishers subtab.
3 You can view different groupings of publishers:
   - To view a specific publisher, click the publisher name.
   - To view the publishers for your team, click View Team Publishers.
   - To view the publishers that belong to you, click View My Publishers.

---

Edit a Publisher

1 On the top navigation bar, click the Customers tab.
2 Click the Publishers subtab.
3 Click the publisher name or click in the row for the publisher.
4 Modify the information in the Name field.
5 In the Sites field, enter the first few letters of a site and then select the site from the autosearch results.

Note: Enter % if you want to display the full list of sites.

To delete existing sites in the Sites field, click the X next to the site name.

6 Click Update.
Delete a Publisher

1. On the top navigation bar, click the **Customers** tab.
2. Click the **Publishers** subtab.
3. In the row for a publisher, click ![delete](delete.png) and then click **OK**.
Managing Industries

About Industries

You can add as many industries as you like to represent your core interests and associations.

Add an Industry

1. On the top navigation bar, click the Customers tab.
2. Click the Industries subtab.
3. Click + Add New Industry.
4. Enter information in the Name field.

Note: You can enter only alphanumeric characters (a–z, A–Z, 0–9), special characters (~@#$%^&*()-[]{}<>"'\), spaces, underscores, and punctuation marks (!,?,:).

5. Click Add Industry.
Edit an Industry

1. On the top navigation bar, click the Customers tab.
2. Click the Industries subtab.
3. Click the industry name or click in the row for the industry.
4. Modify the information in the Name field.
5. Click Update.

Delete an Industry

1. On the top navigation bar, click the Customers tab.
2. Click the Industries subtab.
3. In the row for an industry, click and then click OK.
Managing Regions

About Regions

Regions are attributes that you can assign to advertisers and agencies for reporting.

Add a Region

1. On the top navigation bar, click the Customers tab.
2. Click the Regions subtab.
3. Click + Add New Region.
4. Enter information in the Name field.
   
   Note: You can enter only alphanumeric characters (a–z, A–Z, 0–9), special characters (~@#$%^&*()-[]{}<>,?/"='), spaces, underscores, and punctuation marks (!.,?:).  

5. Click Add Region.
Edit a Region

1. On the top navigation bar, click the **Customers** tab.
2. Click the **Regions** subtab.
3. Click the region name or click in the row for the region.
4. Modify the information in the **Name** field.
5. Click **Update**.

Delete a Region

1. On the top navigation bar, click the **Customers** tab.
2. Click the **Regions** subtab.
3. In the row for a region, click and then click **OK**.
PART 8

Ad Partners

Chapter 43
Managing Partners
Managing Partners

About Partners

Partners are third parties that can communicate directly with ad engines within SAS 360 Match in order to provide real-time bidding during ad serving. SAS 360 Match supports Adela, AppNexus, Index, Prebid, PubMatic, Rubicon, and TripleLift. Partners are distinct from customers. They are not related to advertisers, agencies, and so on.

You can use the Partners section to set the site and size mappings that define how to map items in SAS 360 Match to items from the partner.

Tier floor prices define the minimum acceptable bid response from the partner. Targets define which requests are eligible for bids from partners. Define tier floor prices and targets only when not using placements.

Note: You can set up bid requests for PubMatic using the Partners section without using placement.

For more information about configuring partners, see the SAS 360 Match Platform Integration Guide.
Modify Settings for Adela

1. On the top navigation bar, click the **Partners** tab.
2. Click the **Adela** subtab.
3. On the **Size Mappings** tab, enter a network size for each size mapping as needed and click **Save Sizes**.
4. On the **Tier Floor Prices** tab, enter a floor price for the bids for each size in each tier as needed. Tiers are ordered by their ranks. Click **Save Tiers**.
5. To change the existing target, click on the **Target** tab. Click the X to delete the existing target. Then enter the first few letters of another target, and select a new target. Click **Save Target** to update the selection.
6. On the **Site Mappings** tab, enter a site mapping for each site as needed, and click **Save Sites**.
7. On the **Revenue Share** tab, enter the percentage of the revenue that the SSP charges as its fees, and click **Save**.
   - In the **Open Market Revenue Share** field, enter the percentage of the revenue that the SSP charges as its fees.
   - In the **PMP Revenue Share** field, enter the percentage of the revenue that the PMP charges as its fees.

   **Note:** Contact SAS Technical Support to enable this feature.

   **Click Save.**

8. To enable or disable cookie syncing between SAS 360 Match and Adela, select **Assets ➔ Snippets** and set the status for the *adela_cookie_sync.html* system snippet. For more information, see “About Snippets” on page 151.

Modify Settings for AppNexus

1. On the top navigation bar, click the **Partners** tab.
2. Click the **AppNexus** subtab.
3. On the **Size Mappings** tab, enter a network size for each size mapping as needed and click **Save Sizes**.
4 To change the existing target, click on the **Target** tab. Click the X to delete the existing target. Then enter the first few letters of another target, and select a new target. Click **Save Target** to update the selection.

5 On the **Site Mappings** tab, enter a site mapping for each site as needed, and click **Save Sites**.

6 On the **Revenue Share** tab, enter the percentage of the revenue that the SSP charges as its fees, and click **Save**.
   - In the **Open Market Revenue Share** field, enter the percentage of the revenue that the SSP charges as its fees.
   - In the **PMP Revenue Share** field, enter the percentage of the revenue that the PMP charges as its fees.

   **Note:** Contact SAS Technical Support to enable this feature.

   Click **Save**.

---

### Modify Settings for Index

1 On the top navigation bar, click the **Partners** tab.

2 Click the **Index** subtab.

3 On the **Size Mappings** tab, enter a network size for each size mapping as needed and click **Save Sizes**.

4 On the **Tier Floor Prices** tab, enter a floor price for the bids for each size in each tier as needed. Tiers are ordered by their ranks. Click **Save Tiers**.

5 To change the existing target, click on the **Target** tab. Click the X to delete the existing target. Then enter the first few letters of another target, and select a new target. Click **Save Target** to update the selection.

6 On the **Site Mappings** tab, enter a site mapping for each site as needed, and click **Save Sites**.

7 On the **Revenue Share** tab, enter the percentage of the revenue that the SSP charges as its fees, and click **Save**.
   - In the **Open Market Revenue Share** field, enter the percentage of the revenue that the SSP charges as its fees.
   - In the **PMP Revenue Share** field, enter the percentage of the revenue that the PMP charges as its fees.

   **Note:** Contact SAS Technical Support to enable this feature.

   Click **Save**.
Modify Settings for Prebid

1. On the top navigation bar, click the **Partners** tab.
2. Click the **Prebid** subtab.
3. On the **Size Mappings** tab, enter a network size for each size mapping as needed and click **Save Sizes**.
4. To change the existing target, click on the **Target** tab. Click the X to delete the existing target. Then enter the first few letters of another target, and select a new target. Click **Save Target** to update the selection.
5. On the **Site Mappings** tab, enter a site mapping for each site as needed, and click **Save Sites**.
6. On the **Revenue Share** tab, enter the percentage of the revenue that the SSP charges as its fees, and click **Save**.
   - In the **Open Market Revenue Share** field, enter the percentage of the revenue that the SSP charges as its fees.
   - In the **PMP Revenue Share** field, enter the percentage of the revenue that the PMP charges as its fees.

   **Note:** Contact SAS Technical Support to enable this feature.

   Click **Save**.

Modify Settings for PubMatic

1. On the top navigation bar, click the **Partners** tab.
2. Click the **PubMatic** subtab.
3. On the **Size Mappings** tab, enter a network size for each size mapping as needed and click **Save Sizes**.
4. On the **Tier Floor Prices** tab, enter a floor price for the bids for each size in each tier as needed. Tiers are ordered by their ranks. Click **Save Tiers**.
5. To change the existing target, click on the **Target** tab. Click the X to delete the existing target. Then enter the first few letters of another target, and select a new target. Click **Save Target** to update the selection.
6. On the **Site Mappings** tab, enter a site mapping for each site as needed, and click **Save Sites**.
7 On the Revenue Share tab, enter the percentage of the revenue that the SSP charges as its fees, and click Save.

- In the Open Market Revenue Share field, enter the percentage of the revenue that the SSP charges as its fees.
- In the PMP Revenue Share field, enter the percentage of the revenue that the PMP charges as its fees.

Note: Contact SAS Technical Support to enable this feature.

Click Save.

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Modify Settings for Rubicon

1 On the top navigation bar, click the Partners tab.

2 Click the Rubicon subtab.

3 On the Size Mappings tab, enter a network size for each size mapping as needed and click Save Sizes.

4 To change the existing target, click on the Target tab. Click the X to delete the existing target. Then enter the first few letters of another target, and select a new target. Click Save Target to update the selection.

5 On the Site Mappings tab, enter a site mapping for each site as needed, and click Save Sites.

Note: Rubicon also requires the use of placements. For more information, see Chapter 24, “Managing Placements,” on page 129.

6 On the Revenue Share tab, enter the percentage of the revenue that the SSP charges as its fees, and click Save.

- In the Open Market Revenue Share field, enter the percentage of the revenue that the SSP charges as its fees.
- In the PMP Revenue Share field, enter the percentage of the revenue that the PMP charges as its fees.

Note: Contact SAS Technical Support to enable this feature.

Click Save.
Modify Settings for TripleLift

1. On the top navigation bar, click the **Partners** tab.
2. Click the **TripleLift** subtab.
3. On the **Size Mappings** tab, enter a network size for each size mapping as needed and click **Save Sizes**.
4. To change the existing target, click on the **Target** tab. Click the X to delete the existing target. Then enter the first few letters of another target, and select a new target. Click **Save Target** to update the selection.
5. On the **Site Mappings** tab, enter a site mapping for each site as needed, and click **Save Sites**.
6. On the **Revenue Share** tab, enter the percentage of the revenue that the SSP charges as its fees, and click **Save**.
   - In the **Open Market Revenue Share** field, enter the percentage of the revenue that the SSP charges as its fees.
   - In the **PMP Revenue Share** field, enter the percentage of the revenue that the PMP charges as its fees.

Note: Contact SAS Technical Support to enable this feature.

Click **Save**.
Managing Reports

About the Reports Tab

On the Reports tab, you can run Business Intelligence (BI) reports and operational reports.

Run a Report

1. On the top navigation bar, click the Reports tab.
2. Click a report name on the dashboard or select a report from the Reports list.
3. In the report window, enter the desired filters and then click Run Report.

Note: The generated report uses the value in Title as its file name, and replaces spaces with underscores. If there is no title specified, the report name is used for the file name. The value in Title is also used as the header in the exported file.
Export a Report

1. On the top navigation bar, click the Reports tab.

2. Click a report name on the dashboard.

3. In the report window, enter the desired filters and then click Export xlsx to export the report as an Excel file or click Export csv to export the file as a comma-separated values (CSV) file.

   - If Title is specified, the generated report uses the value as its file name, and replaces spaces with underscores. The title is also used as the subject for email messages. If there is no title specified, the report name is used for the file name and email subject. The value in Title is also used as the header in the exported file.

   - If Emails is specified, the generated file is sent to the email addresses. If there are no addresses specified in Emails, the file is downloaded to your folder.

Schedule a Report

1. On the top navigation bar, click the Reports tab.

2. Click a report name on the dashboard.

3. In the report window, enter the desired filters.

4. To set up a new schedule, expand the Schedule panel and then do the following:
      - If you select Daily, select a value from the Run at Hour list.
      - If you select Weekly or Monthly, select a value from the Run on Day and Run at Hour lists.
   b. Enter a time value in the Expire in field.
   c. Click Schedule Report.

5. To modify existing schedules for reports, click Manage Schedules, select the schedule to update, and make your changes.
About BI Reports

The Business Intelligence (BI) reporting system is a powerful and extensive report builder with access to a large, configurable data set that enables you to analyze historical and future (projected) data. The reporting tool is called the Analyzer. Unlike operational reports that contain near real-time data, BI data is a day behind.

SAS 360 Match stores report data for 18 months, and older data is typically removed from the database. You can schedule a BI report that includes selected data points so that you can review older data.

Note: If you want to archive more data, contact SAS Technical Support to configure a log file export to store the information that you need with data that has not been aggregated.
Open a BI Report

1. On the top navigation bar, click the Reports tab.
2. Click BI Reports.
3. Click 📂.
4. Click a report name.

After you select a report, the main report window appears. The column on the right contains a list of available fields that can be used as columns or filters in the report. The fields are broken down by section. Fields contain campaign and flight information and tags that have been set up for BI logging. Fields with a number in parentheses indicate additional properties that can be displayed after the field is added to the report. The Measures section contains count data fields such as Impressions Served.

Note: Always use the Save As button to rename reports that include "_empty" in the file name.

Data Cubes for BI Reports

Each report uses a specific data cube that specifies what data is accessible to the Analyzer. The data cubes are accessible through the following "empty" reports that all other reports are based on:

- **Bidsum_empty**
  - contains historical data about SSP bidding, including successful and unsuccessful bid attempts, as well as bid pricing and details about why bids were unsuccessful.

- **Bigsum_empty**
  - contains historical logging data down to the creative level. Tags and geotargeting tags can also be included in the cube. If a tag needs to be added to this cube, contact SAS Technical Support.

- **Flights_empty**
  - contains non-delivery flight informational data. There is no date data or tag data in the cube. The cube can be used to report on flight attributes like impression goals, start and end dates, and so on.

- **Inventory_empty**
  - contains simulated (projected) data for future dates. Like the Bigsum_empty cube, it also contains data down to the creative level and can include tags. By default, dates up to three months in the future can be selected.
Mediumsum_empty contains historical data down to the creative level, along with site and area tags. This is a much smaller cube and generally has a much faster processing time than the Bigsum_empty cube. This cube should be used for most historical reporting.

Pace_empty although it is similar to the Mediumsum_empty cube, this cube also contains time of day data. This means that delivery by time of day down to the hour can be seen for individual flights.

Workflow_empty unlike the other data cubes, this one does not contain any delivery data. It is used to access the sales workflow data to construct reports showing proposals and line items.

Filtering BI Reports

Note: To minimize the run time of the report, you should avoid selecting contains or Match a specific string as filters.

Filters restrict the data set to display the desired information. The fields on the right can be used as filters. Click + next to No Filter in use. You can drag fields such as the Date field into this expanded area. After you drag the Date field, a dialog box appears in which you can filter the report by date attributes.

Dragging a standard field to the filter area enables you to select explicit values. You can select multiple values in a row by clicking a value, holding down the Shift key, and clicking the last value. You can also select multiple values by clicking a value, holding down the Ctrl key, and then clicking each desired value. After you select the values, click > to move them to the selected values box to the right. If you need to select all the values, click >>. To move the values back to the deselected box, click < and <<. By default, values moved to the right box are treated as “included.” This means that the report displays only the data that contains these values. You can also select Excluded in the menu next to Currently to display only the data without these values in the report.

Use the option buttons at the top of the dialog box to determine where individual values are selected (Select from a list). You can also use the option buttons to select values that are based on a string (Match a specific string). If you select Match a specific string, then entering 2012 filters on all dates that contain 2012. You can use most fields as filters, but it is recommended that you use the Date field instead of the Month field to filter dates. After you select the values, click OK to activate the filter.
Building a BI Report

After the desired filters are set up, you drag fields to the main report area as columns. Measures can generally be placed only as columns on the right. Fields can also be placed above the Measure columns. If you need to undo a change to the report, click the blue left arrow in the upper right part of the BI screen. This is also useful when you are adding a column or filter results in an error. Changes can be redone by clicking the blue right arrow. Properties contain additional data related to the field. Fields that have a number inside parentheses in the field list indicate that there are available properties. For example, you can right-click the Advertiser field header to open the Show Properties menu. Properties that can be enabled appear as additional columns with a light yellow background. Unlike fields, properties cannot be used as filters and cannot be rearranged in the column order. You can right-click each column to open a menu with additional options. Fields and measures have different options available.

Note: Modifying data after a campaign, flight, or creative has gone live and after data has been logged to a BI report might cause data logged before and after the modification to show up on different BI reports if the data changed is part of the selection criteria.

Generating Graphs and Charts in a BI Report

BI also generates graphs and charts from report data. Click next to View As. Measures are always placed on the vertical axis. Regular fields are placed on the horizontal axis. Filters and fields can still be added and modified while you are in the graph mode. To switch back to the regular view, select the Table icon next to .

Exporting, Mailing, and Scheduling BI Reports

To export reports, click More in the upper right part of the BI window. The Export Report submenu enables conversion to PDF, Excel, and CSV files.
You can email reports after you have saved them. Be sure to click if you open a "_empty" report first. Click at the top of the screen, select the report, file type, and then enter the email address.

To schedule BI reports, set up the fields that you would use to email the report, enter Daily, Weekly, or Monthly in the scheduling options, and then enter the time at which you want the report to start running.

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**Note:** Scheduling multiple reports to run simultaneously can result in some or all reports failing to complete running or failing to be emailed. Previously scheduled reports can be accessed by clicking Manage Schedules.

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User-Defined Fields

User-defined fields are custom calculations that can be created and defined in the Analyzer. Right-click a measure (for example, Impressions Served) and then select the User Defined Number submenu. In this submenu, you can select the % of, Rank, and Running Sum, which are predefined calculations. For example, you can create a column that shows the numerical rank of each row’s Impressions Served by selecting Rank by Impressions Served. After you click Next, change the Name of the column, number format, and decimal places, and then click Done. The new column is created and placed in the Analyzer view.

In the User Defined Number submenu, select Calculated Number to create custom calculations. Available measures are listed in the left section, and the actual calculation is displayed in the right section. Each measure is enclosed in brackets when it is placed in the calculation. A measure can be placed in the calculation by selecting it and pressing the > button, or by manually entering the calculation.
Managing Operational Reports

About Operational Reports

Operational reports include any report that is not part of the Business Intelligence (BI) suite. You access the operational reports on the Reports tab. The operational reports provide a fast and easy way of looking at historical data, and can provide nearly real-time data (delayed by a maximum of six minutes) unlike BI, which can report only up to the preceding day. Users with full Administrator access can view all reports and all data, but users with more restricted roles see only a subset of that data. For example, a user assigned the Agency role sees only data for flights that are assigned to their Agency.

The information in the Title field is used as the file name for emailed or scheduled reports. Spaces in the Title are replaced with underscores. Select the Include views check box to add a column that displays counts for viewed ads.

All operational reports can be scheduled to run at a specified time or interval using the Schedule section on each report’s page. All reports can also be exported to CSV and XLSX format.

Large (>25 MB) operational reports are stored remotely and a link to the report is sent via email. The link is active for 14 days. Smaller reports are sent as email attachments.

On the Reports page, you can run the following types of operational reports:

Advertiser’s

provides a general overview of what advertisers, campaigns, flights, and creatives served within the specified criteria (report options). Impressions, clicks, actions, click rate, and action rate are the displayed metrics.

Area Size

displays impressions, clicks, and actions for area values and each creative size that served under each area.
Billing
this large report lists advertisers, campaigns, and flights that were active during
the specified date range. Metrics shown are start and end dates, impressions,
clicks, actions, impression goals (including bonus), click goals (including bonus),
action goals (including bonus), flat rate revenue, and calculated revenues. Note
that the displayed flat rate is not calculated. Instead, the full flat rate amount set
in the flight is displayed.

Custom Action
the only report that displays custom action activity. The name of the custom
action, attribution (impression or click), and the number of actions are displayed
for advertisers, sites, areas, flights, and creatives.

Device/Geo
displays historical impression, click, and action data for mobile device and geo
tags. The report can be filtered by Advertiser, Agency, Campaign Name, Flight
Name, Site, Area, or Size. Device and geo tags are selected in the Options
field. To see all available options, enter %. The output also includes an interactive
chart that works in a similar way to the Dashboards. Note that device and geo
tags must be logged in Bigsum to be used in this report.

Flight Status
displays flights filtered by status. This report can be used to help determine how
flights are performing. Advertisers, campaigns, and flights are displayed along
with the tier, products and targets, and start and end dates that belong to those
flights. Realized amounts and goals are displayed for impressions, clicks, and
actions. Note that the site filter that can be applied to the report filters only
against flights that are explicitly targeted to the specified site when you are using
the Sites & Areas section on the Flight window. If a flight is targeted to a site
through other means, such as an actual target, those flights are not included in
the report results if a site is specified in the criteria. Along with the above, On
Schedule Percentage is displayed. The On Schedule Percentage value indicates
how close, percentage-wise, a flight is to serving its ideal daily amount. On
Schedule Percentage is the only value in the report that should be used to
determine performance of a flight.

Outage
shows delivery outages for service-level agreement (SLA) reporting.

Performance
provides an overview of the actions and impression, click, or view data that can
be filtered. If an advertiser is selected, custom actions can be included.

Note: The breakdown option is available only when the report is exported to
CSV or XLSX.

Product
shows products and the flights that could serve to the demographic in the
product. It is the only report that displays future, or projected, data. Projected
impressions are displayed along with available inventory amounts.

The Product report analyzes historical data to calculate the available and
reserved impression counts for a specified date range for products that are
created in SAS 360 Match. The report takes into account the targeting for the
product when it creates the forecast, even when the product is not explicitly
assigned to flights. This is also true with the Check Avails feature.

In the Product report:
- the available value is a forecast of what might be available during the forecast date range.
- the reserved value is the inventory that is already claimed by competing flights.
- the total value is a forecast of how much a product could deliver in the forecast date range if there are no competing flights that consume inventory.

The Product report uses pre-emptible tiers to calculate the available inventory for a product. This is true even for a flight that is in a tier that is not pre-emptible at the flight level, such as a flight with a guaranteed type. Conversely, the inventory for any flight is considered reserved if the flight is in a tier that is not pre-emptible, regardless of the flight's type.

Products with targets that fail are not included in the analysis. An example is a product with a target that contains a custom tag or a tag value that is not included in the nightly simulation process that is used for forecasting.

The portion of a product target that is not a logged value always evaluates to true when running the analysis. This is equivalent to removing the unlogged portion of the target from the analysis. Keywords, referrer URLs, user agent strings, and domains are not logged.

For example, the analysis of a product with the target `Site=football and Referrer=www.nationalfootballleague.com` will treat the target as `Site=football` because the referrer URL is not a logged value. This can result in inflated projection counts because the removal of `Referrer=www.nationalfootballleague.com` from the target creates a less restrictive target.

Publisher's
- provides a general overview of what advertisers, campaigns, flights, and creatives were served within the specified criteria (report options). It is exactly the same as the Advertiser’s report with the exception of revenue.

Site Area
- displays flight impressions, clicks, and actions for site values as well as each area value that served with the site.

Size Served
- displays impressions, clicks, and actions for each creative size that served during the specified date range.

Tags
- displays impressions, clicks, and actions for the tag values under the specified tag. The value `OTHER` includes all impressions that did not include the specified tag in the ad call, or included a value for the tag that does not exist. If no data for a tag exists, make sure that the **Tagsum logging** option is enabled by editing the tag in SAS 360 Match.

Tag Assessment
- displays a list of tag values associated with the selected flight type to help determine the most productive tag and tag combinations. The report computes the value of every tag that is used in targeting in active and pending flights. The tags are ordered by value and display the % of highest tag value for all other tags. The highest value tag is 100%.

Third Party Data
- third-party data can be provided to SAS 360 Match, which can be displayed using this report.
Time of Day
provides a 24-hour breakdown of impressions, clicks, and actions for the
specified date range. The site filter that is applied to the report filters only flights
that are explicitly targeted to the specified site using the Sites & Areas section
on the Flight window. If a flight is targeted to a site through other means, like an
actual target, those flights are not included in the report results if a site is
specified in the criteria.

Unique Visitor
lists flights along with unique impression, click, and action amounts. These
amounts reflect the number of unique visitors that were served the flight, or
submitted a click or action for the flight. You use the Option criteria to apply one
of the following levels of uniqueness: unique for a 24-hour period, unique for a
month, or unique in the entirety of the record.

Usage
shows selections (each time the service requests a decision), how APIs and data
are used, and fraudulent activity listed separately by impression fraud and by
beacon fraud. The report also displays the total number of impressions that are
flagged by the allowlist and the denylist.

Workflow Revenue
displays Proposal and Line Item data for the specified criteria. The Date Range
selection filters based on the Proposal start date, and Proposals without a start
date are included regardless of the specified date range. Proposal Advertiser,
Agency, Bill To, Salesperson, External ID, and start and end dates are included.
Product, Product Line, and Billable Amount data is displayed for each Line Item.
The CSV and XLSX exports include a breakdown of Billable Amount by month.
PART 10

Admin

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About Admin Settings

Use settings to specify targets that should not be logged. Metrics for these targets will not be collected. If a request to the ad server matches a target, the request is not logged. This applies if the requests are impressions, clicks, actions, and views.

You can use settings to combat fraudulent activity. For example, if a particular host is submitting fraudulent traffic, you can build a target for that host. Once it is specified as a target, the host’s requests are no longer logged. In addition, targets can be used to temporarily prevent the logging of test traffic or any other type of traffic.

Note: Only administrators have access to the settings feature.

Configure Settings

1. Click the Admin tab in the top navigation bar.
2. Select the Settings subtab.
3. List the targets that should not be logged in No Log Targets. If multiple targets are specified, the request must match at least one target for logging to be bypassed.
4 Select the **Require a product when saving flight** check box to require that at least one product must be assigned to a flight before the flight can be saved.

5 (Optional) Use **Cookie string** to append additional settings to the end of your cookie string.

By default, there is no security setting for your cookies. Specify the security level for your cookies using one of the following options:

- **HttpOnly** prevents the cookie from being set directly on the web browser using JavaScript.
- **Secure** requires that the cookie be transmitted using only the secure HTTPS protocol.

*Note:* To apply **HttpOnly** and **Secure** rules, separate the strings with a semicolon.

You can also specify the **SameSite** value using one of the following options:

- **Lax** ensures that your cookie is sent within the same domain. The cookie is sent only if the domain for the URL on the browser matches the cookie’s domain.

  *Note:* This is the default setting for **SameSite**.

- **Strict** ensures that your cookie is sent within the same site. The cookie is sent only if the site for the URL on the browser matches the cookie’s site.

- **None** does not apply any **SameSite** rules. However, this value is invalid in non-secure (HTTP) requests and **SameSite** reverts to **Lax** rules.

6 (Optional) If you work with DMPs, you can use the **DMP Dynamic Segment Tags** section to control segment keys for **AdForm**, **Adobe**, **Lotame**, or **Salesforce DMP/Krux**. You can also set the **Salesforce DMP/Krux** user ID key under the **Krux Visitor Id**.
About Users

Manage your users with individual accounts. You can specify access rights for the users with roles, assign them to teams, and log each individual's actions.

Note: By default, only administrators have access to roles. However, other roles can be granted access to this feature.

Create a User

1. Click the Admin tab in the top navigation bar.
2. Select the Users subtab.
3. Create a unique Login ID for the user.
4. Enter the user’s Email Address.

Note: Email address must be unique.
5 (Optional) Enter the user’s Full name.

6 Set a Password and confirm it in Password confirmation. By default, passwords must be at least four characters. In addition, you can require more complex passwords that include at least one number, one lowercase letter, one uppercase letter, and one special character. Contact SAS Technical Support at support@sas.com to enable the complex password option.

7 (Optional) Add the user’s Phone, Fax, and Address.

8 Set the user’s Locale to set the browser language.

9 Set a Time Zone for the user. If this option is set, the user’s time zone overrides the system default time zone. Dates and times are displayed in the specified time zone for this user. When the user creates flights and line items, dates and times for these entities default to the user’s specified time zone.

   Note: The time zone is displayed in the top right corner of the screen.

10 Set a Currency. When the user creates flights and line items, the default currency for these entities is the user’s specified currency.

   Note: The currency specified for a user takes precedence over the currency specified for any teams the user is in. Team currency takes precedence over the base currency.

11 Set the user’s Status to Active for this user to show up in lists of users or to Inactive to hide the user.

   Note: You cannot delete users. Instead, set their status to Inactive to hide them.

12 (Optional) Add any Notes for this user.

13 In the Teams & Roles section:

   a (Optional) To limit users to only the products and tiers that are available to their assigned teams or to products and tiers that are not assigned to any teams, select Team restricted. By default, users can access, manipulate, and report on all products and tiers.

   b Set a Role for the user. Each user must have at least one role. For more information, see “About Roles”.

   Note: The role set in the user profile overrides the role that is assigned to the user through team membership.

   c (Optional) Set a Team for the user. A user can be assigned to multiple teams. For more information, see “About Teams”.

   d Select Default to set the default role and team when a user is assigned to multiple roles and teams.
14 Click **Add User** to create the new user.

**Note:** To switch among multiple role and team combinations for a user, select a profile from the drop-down list in the upper right, next to the user name.

---

## Edit a User

1. Click the **Admin** tab in the top navigation bar.
2. Select the **Users** subtab.
3. In the row for a user, click the user name or click ![Edit User](link).
4. The editable fields are the same as those you edit when you create a user.
5. The **API Key** field contains the API key that was generated when the user was created.
6. You might see additional fields, depending on the user’s assigned roles:
   - When editing a user with the AdOpsManager or the Trafficker role, the **Associated Salespeople** field appears. Any salesperson or sales manager who is associated with this user is listed here. Delete the salesperson to remove the association.
   - When editing a user with the Agency role, the **Agency** field appears.
   - When editing a user with the Publisher role, the **Publisher** field appears.
   - When editing a user with the SalesManager or Salesperson role, two fields appear:
     - **Associated Traffickers**: Select users with the Trafficker or AdOpsManager roles to associate with this user.
     - **Assign sales person an advertiser or agency**: Select advertisers or agencies to associate with this user.
7. Select **Update** to save the changes.
Note: If a user who is assigned the roles of Publisher, Advertiser, or Agency has a publisher, advertiser, or agency specified, that user can access only data that is associated with those entities.

View a User’s API Key

SAS 360 Match provides a set of APIs to enable easy integration with other systems or for users to manipulate elements such as campaigns, creatives, and flights. External systems that integrate with SAS 360 Match should be assigned unique user accounts. This enables you to control access permissions for the external systems and to identify and log the actions that are performed by the remote system.

SAS 360 Match generates a unique API key for each user that is created. You can use this API key to authenticate your API requests.

For information about ways to authenticate with the APIs, select Home ⇒ API Docs.

To retrieve an API key for an individual, a user who is assigned to a role with permission to view API keys, such as a system administrator, can use the following steps:

1. Click the Admin tab in the top navigation bar.
2. Select the Users subtab.
3. Select the user.

   Note: Use the Filter panel to refine your results.

4. Find the key in the API Key field.
About Single Sign-On

Single sign-on, also known as SSO, is a way of authenticating users in SAS 360 Match through a third-party identity provider, or IDP. To configure SSO, you must set up the IDP and SAS 360 Match to exchange data.

Note: Only administrators have access to the single sign-on feature.

Here are terms that are commonly used in configuring SSOs:

Identity Provider (IDP)
provides identities for users who need to interact with a service provider. The IDP usually hosts the user information repository that handles authentication and password management.

Security Assertion Markup Language (SAML)
enables SSO by allowing a single-user authorization service, such as an IDP, to grant access to third-party or remote applications. For example, when SAML is set up and configured, the IDP can provide credentials to log on to applications such as Airbrake, PagerDuty, or Slack. The service provider and the IDP communicate using SAML.

Service Provider (SP)
provides features or functionality to users. The IDP, rather than the SP, manages user authentication. In this case, the SP is SAS 360 Match.
User Agent
usually refers to a web browser.

Configure SSO with Okta

Set up Okta to exchange required data with the SP, which is SAS 360 Match.

To set up Okta as an IDP:
1. Log on to Okta.
2. Select Add Applications in the Shortcut menu on the dashboard.
3. Click Create New App.
4. Click Show Advanced Settings to display all the fields in the SAML Settings panel.

Data for IDP and SP

To set up the connection, the IDP and the SP, which is SAS 360 Match, must exchange information.

IDP Data Required by SP

The SP requires the following information from the IDP:
- the IDP SSO URL to redirect users for authentication
- the IDP issuer URL
- a copy of the IDP X.509 certificate

These values can be entered manually or provided by a metadata XML file to the SP. The SAML uses the name ID format to enable the IDP and SP to exchange information about a user and to identify the user. The SP expects the name ID to be persistent.

SP Data Required by IDP

The IDP requires the following information from the SP:
- the SP URL to post authentication information, that is, the SP consumer or SP SSO URL.
- the default SP landing page, that is, the audience URI or SP entity ID. This is typically the home page for the website.

- authentication user payload information that is sent to the IDP in the format required by the SP. An SP defines the user attributes or claims that are acceptable. For example, the attributes might be login instead of username, first_name instead of FirstName, or email instead of email_address. If necessary, the IDP transforms its user data to the expected format before posting it to the SP consumer URL.

When posting to the SSO consumer URL, SAS 360 Match requires the persistent name ID. In addition, the SP has to configure the IDP to send the four following attributes

**Note:** The attribute names are case sensitive and must be listed exactly as they are below.

- FirstName
- LastName
- Email
- Login

(Optional) The assertion encryption certificate generated by SAS 360 Match. Configure the IDP to accept an encryption algorithm of AES-256-CBC and key transport algorithm of RSA-OAEP.

---

## Configuring SSO

After logging in through the IDP, SAS 360 Match creates a new SSO user account for each email address provided by the IDP that does not exist for the SP. If the email address already exists, the existing user account in SAS 360 Match is converted to an SSO account. A user who has logged on using the SSO service can no longer log on to SAS 360 Match in the traditional manner.

**Note:** Create at least one user account with administrator access that is not used for SSO. This ensures that if the IDP is down, at least one account will still able to log on to SAS 360 Match.

During the initial setup, do not set the SSO configuration as the default until it is proven to work. Once the SSO configuration is set as the default, navigating to the URL of the user interface redirects you to the IDP’s login screen, if the user is not logged in. After the IDP and the SP are configured and enabled, authentication by the SSO starts automatically.

**Note:** The IDP configuration requires information to be exchanged between the SP and the IDP during setup. You might want to create an initial SSO configuration with only the name and the default role set and leave the URL fields blank before you
configure the IDP. Configuring the SSO in this manner enables you to have the required information before you get started.

To configure the SSO:

1. Click the Admin tab in the top navigation bar.
2. Select the SSOS subtab.
3. Fill in the following information:

- **Note:** The fields in the SSOS subtab are automatically populated after information is copied into the Metadata field.

  a. **Name:** The unique name for the SAS 360 Match installation. The name must be URL safe because the SSO name is part of the SP SSO URL that is provided to the IDP.

     **Note:** This field is read-only after you create the SSO.

  b. **Consume url:** This value is set by SAS 360 Match during SSO setup. Provide this URL to the IDP during SSO integration.

  c. **Login url:** This value is set by SAS 360 Match during SSO setup. If the Default option is selected, users are prompted to log on through this URL instead of through the local login URL.

  d. **Active:** Select this option to enable users to log on through this SSO.

  e. **Default:** Select this option to enable all users to be authenticated by this SSO by default. Otherwise, anonymous users are authenticated using another SSO or the local application login.

  f. **Default role:** Specify the default role for new users when they first sign in with the SSO. Teams, roles, and permissions must be managed by SAS 360 Match.

  g. **Refresh duration:** Specify the number of minutes to wait before reverifying the authentication information with the SSO.

     **Note:** The minimum duration is 15 minutes.

  h. **Idp sso target url:** Get this information from the IDP.

  i. **Idp issuer:** Get this information from the IDP.

  j. **IDP Certificate:** Get this information from the IDP.

  k. **SP Certificate:** This information is generated by SAS 360 Match. Provide this certificate to the IDP if you want to use assertion encryption.

  l. **Metadata:** (Optional) Use this URL to upload IDP information, if the SSO record was created that way.

4. Click **Update**.
After the IDP and the SP are configured and enabled, authentication by the SSO starts automatically.
Roles

About Roles

Roles enable you to set access rights for groups of users. You can use roles to specify the menu items, pages, and reports that users can view, edit, or delete. Each role has a set of permissions that can be configured.

Note: By default, only administrators have access to roles. However, other roles can be granted access to this feature.

The following are default user roles that can be edited but cannot be deleted:

AdOpsManager
users with this role have access to all sections except for sales workflow and users. AdOpsManager users can be assigned to the role of Trafficker in campaigns. They can view all campaign results by selecting the View All Campaigns option.

Advertiser
users with this role can view campaigns, flights, and creatives created under their names. These users can also view sales line items and terms and conditions. If the user has an advertiser assigned to them, the user can access only data associated with that advertiser. Users in this role can see only the advertiser's report.

Agency
users with this role have the same access as Advertiser but can view only campaigns where they are assigned as Agency. If the user is assigned to an agency, the user can access only data associated with that agency. Users in this role can see only the advertiser's report.
FinanceUser
users with this role can view sales workflow, edit proposals and RFPs, and view and edit customers. They have no report access.

Publisher
users with this role have access to only the publisher’s report. If the user has a publisher assigned to them, the user can access only data associated with that publisher.

SalesManager
users with this role have the access rights of a Salesperson role, as well as the ability to delete campaigns, flights, creatives, customers, and some targeting elements. Users with this role can be assigned as a salesperson in a campaign. Users with the SalesManager role can view all campaigns by selecting the View All Campaigns option.

Salesperson
users with this role can view all sections in a campaign except users and creative formats, can create but not delete campaigns, can see only reports for campaigns where they are assigned as the salesperson or they are associated with a team who created the materials. The salesperson or user who is associated with the sales team can use Live Preview to preview creatives. For flights, users who are assigned the Salesperson role can only view flights and use Live Preview to preview creatives. A user with the Salesperson role can create creatives, advertisers, and agencies but cannot delete these items.

Trafficker
users with this role can view only the campaigns where they are assigned as a trafficker. They can view all sections except users. There is no Delete access. They can view all reports.

Add a Role

1. Click the Admin tab in the top navigation bar.
2. Select the Roles subtab.
3. Click + Add New Role.
4. Create a Name for the role.
5. Select Ad Ops Manager, Sales Manager, Salesperson, or Trafficker user types for the role. Users assigned to the role appear in menus associated with the role’s specified user types. For example, users assigned to the roles of Salesperson and Trafficker appear in the drop-down menus for these roles.
6. Select Add Role.
7. Configure permissions for the role. For more information, see “Edit Role Permissions”.
8. Select Save Role Permissions.
9. Once you have created a role and set its permissions, you can assign users to the role in Admin → Users. For more information, see “About Users”. 
TIP Instead of creating a role from scratch, copy and edit an existing role that has similar permissions. In Admin ➤ Roles, click for the role that you want to copy.

Edit Role Permissions

Once a role is created, you can configure its permissions and actions.

Note: An enabled action or permission does not imply another. You must set all the actions and permissions you want the role to have. For example, if you want users assigned to this role to be able to make changes to the entities that they create, you must enable the Create and Edit actions. In the same way, if you want the users with this role to be able to view all entities as well as get a narrower view of those entities assigned only to the user, you must enable View Global and View Assigned To Me permissions.

1 Click the Admin tab in the top navigation bar.

2 Select the Roles subtab.

3 Select a role to edit. A summary of permissions for the role displays.

4 Select the actions for the role.
   a View: enables the user to open and view an existing entity, without the ability to edit or save.
   b Create: enables the user to create a new entity.
   c Edit: enables the user to edit existing entities but not create new entities. The user might not have View access.
   d Delete: enables the user to delete entities.
   e Schedule: enables the user to create, manage, and delete scheduled reports.

5 Select the permissions for the role.

Note: Permissions follow this order of precedence: global permissions override team permissions, which override role permissions.

a Global: enables the user to access all entities regardless of ownership, assignment, or restriction.

b Team: enables the user to access entities that are assigned to the same team as the user. For more information, see “About Teams”.

c Assigned To Me: enables the user to access entities that are assigned to the user through Salesperson or Trafficker roles.
None: does not allow the user access to any entities.
Teams

About Teams

Organize and manage users by assigning them to teams. Use teams to group users by their ability to access specific products. A team can be restricted to interact only with products that are assigned to the team and to products that are not assigned to any teams.

Note: By default, only administrators have access to teams. However, other roles can be granted access to this feature.

Add a Team

1. Click the Admin tab in the top navigation bar.
2. Select the Teams subtab.
3. Click + Add New Team.
4. Enter a Name for the team.
5. Select a Currency for the team. When a member of this team creates flights and line items, the default currency is the team’s specified currency. For more information, see “About Currency”.
6 Choose team members from the Add Members list, which shows all active users.

Note: Hold down the Ctrl key to select multiple users.

7 Select the role for the member or members from the With Role list. For more information, see "About Roles".

8 Specify the Tiers that the team can access. For more information, see "About Tiers".

Note: Team members who have the Team restricted option selected in their user accounts can access the tiers that are associated with their team and any tiers that are not associated with another team.

9 Click Add Team.
Currency

About Currency

You can modify conversion rates for the predefined currencies that can be specified in flights and line items.

Note: Only administrators have access to the currency feature.

Base Currency

The base currency is the currency value and format that are used in flights and line items. The base currency is also used in the conversion rates for other currencies.

Note:

The default base currency is the US dollar. Contact SAS Technical Support at support@sas.com to configure the options for your base currency.
Specify a Conversion Rate

Use a conversion rate to specify how to convert a given currency to the base currency. The conversion rate is multiplied with the currency value to calculate the value in the base currency. In these examples, the US dollar is the base currency:

- If 1 Euro is equivalent to 1.31 US dollars, use 1.31 as the rate for the Euro.
- If 1 Japanese yen is equivalent to 0.0099 US dollars, use 0.0099 as the rate for the Japanese yen.

To specify a conversion rate:

1. Click the Admin tab in the top navigation bar.
2. Select the Currency subtab.
3. Click the Edit Currency button.
4. In Conversion Rates, enter the conversion for the currency.
5. Click the Update button.
Logs

About Logs

Logs record all user interactions and the times they occurred in SAS 360 Match. You can use logs to investigate which user accounts made changes, and when those changes were made.

Note: By default, only administrators have access to logs. However, other roles can be granted access to this feature.

View Log Entries

1. Click the Admin tab in the top navigation bar.
2. Select the Logs subtab.
3. Click to view the history for all the changes for the entity.
4. (Optional) Use any of the fields in the Filter panel to refine your results.
   a. Set a date for activity in Activity since.
   b. Search for an entity by name using the Entity name_like field.
   c. Use the drop-down list from Entity type to search for an activity with a specific entity type.
Use the drop-down list from **Action** to search for activity with a specific action.

Use the drop-down list from **Changed by** to search for activity by a particular user.

Click **Filter**.