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PART 1

Introduction to SAS Intelligent Advertising for Publishers

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About SAS Intelligent Advertising for Publishers

What Is SAS Intelligent Advertising for Publishers?

SAS Intelligent Advertising for Publishers is a complete online publishing solution that includes sales order management, simulation-based forecasting, ad serving, and business intelligence capabilities to help you make better-informed decisions faster across the entire business. SAS Intelligent Advertising for Publishers gives publishers complete control of the online advertising process by providing a comprehensive solution that supports multiple platforms, including mobile, display, and video output devices.

SAS Intelligent Advertising for Publishers enables publishers to:

- manage sales orders
- simulate and forecast inventory levels
- optimize pricing and target ad delivery
- provide billing and invoicing reports
- visualize and analyze ad delivery details
Navigating the User Interface

Log In to SAS Intelligent Advertising for Publishers

Navigating the User Interface

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Log In to SAS Intelligent Advertising for Publishers

In the address bar of your web browser, enter the URL for SAS Intelligent Advertising for Publishers (for example, http://shrtname.aimatch.com where shrtname 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 Intelligent Advertising for Publishers.

2 Enter a Login ID and Password.

3 Click Login. The Home screen appears.

Navigating the User Interface

After you log on, the Home page for SAS Intelligent Advertising for Publishers 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 Intelligent Advertising for Publishers. The following table lists and describes the tabs on the Home tab:

Table 2.1 Overview of 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 Intelligent Advertising for Publishers.</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 “Setting Alerts” on page 167.

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 X 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 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. You can also drill down on a flight in the chart. The chart is updated every half-hour. Flights that have an end date and a status of Open or Paused are displayed in the chart. Flights that have no end date are not displayed in order to reduce clutter in the chart. The two dashed, vertical red lines represent the OnSchedulePriority value (default value = 1.0) and 75% of that value. The solid, vertical red line indicates the point of time at which the flight is 80% complete. Flights that appear in the upper left quadrant of the chart are the first flights that you should examine because they are at or near completion and behind schedule. Note: Flights whose end date exceeds the end date of inventory projection forecasts display inaccurate projection numbers.</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 2.3 Overview of 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 “Managing Campaigns” on page 39.</td>
</tr>
</tbody>
</table>
**Flights**
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 “Managing Flights” on page 53.

**Tiers**
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 “Managing Tiers” on page 57.

**Custom Actions**
Lists all custom actions that are set up in the system. Custom actions are typically visitor-triggered event markers. For more information, see “Managing Custom Actions” on page 65.

**Debug Ad Request**
Makes an ad call to the engine and receives debugging information. For more information, see “Debugging Ads” on page 67.

**Labels**
Adds custom fields and values to a flight. These custom fields are available through the API and BI reporting. For more information, see “Managing Labels” on page 69.

---

**Creative Tab**
The **Creative** tab contains all creative-related functions. The following table lists and describes the tabs on 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 “Managing Creatives” on page 73.</td>
</tr>
<tr>
<td>Multiple Creative</td>
<td>Creates multiple creatives. For more information, see “Managing Multiple Creative” on page 79.</td>
</tr>
<tr>
<td>Smart Upload</td>
<td>Parses third-party files and sets up multiple creatives. For more information, see “Managing Smart Upload” on page 81.</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 “Managing Name Patterns” on page 83.</td>
</tr>
</tbody>
</table>
### Creative Formats
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 “Managing Creative Formats” on page 85.

### 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 “Managing MIME Types” on page 93.

### 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 Name like field. For more information, see “Managing Targets” on page 97.</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 “Managing Tags” on page 103.</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 “Managing Tag Groups” on page 105.</td>
</tr>
<tr>
<td><strong>Tag Value Aliases</strong></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 107.</td>
</tr>
<tr>
<td><strong>Sites</strong></td>
<td>Lists all site values that are loaded in the system. Sites can function as a tag. For more information, see “Managing Sites” on page 109. Includes a quick link to Create Multiple Sites. For more information, “Add Multiple Sites” on page 109.</td>
</tr>
</tbody>
</table>
### Areas
Lists all area values that are loaded in the system. Areas can function as a tag. For more information, see "Managing Areas" on page 111. Includes a quick link to Create Multiple Areas. For more information, "Add Multiple Areas" on page 111.

### Sizes
Lists all creative sizes that are loaded in the system. For more information, see "Managing Sizes" on page 113.

### Supertags
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 "Managing Supertags" on page 115.

### Placements
Lists placements that partners can bid on. Placements can also be configured to use several partners. For more information, see "Managing Placements" on page 117.

### 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 "Managing Events" on page 121.

### 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 &quot;Managing Media&quot; on page 125.</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 HTML 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 &quot;Managing Advertiser Creative Templates&quot; on page 127.</td>
</tr>
<tr>
<td><strong>Snippets</strong></td>
<td>Lists snippets that can be added to a creative. For more information, see &quot;Managing Snippets&quot; on page 133.</td>
</tr>
</tbody>
</table>
Sales Tab

The Sales tab contains the Sales Workflow portion of SAS Intelligent Advertising for Publishers. 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 “Managing RFPs” on page 137.</td>
</tr>
<tr>
<td>Proposals</td>
<td>Lists all proposals that are loaded in the system. For more information, see “Managing Proposals” on page 141.</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 “Managing Products” on page 151.</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 “Managing Uplifts” on page 157.</td>
</tr>
<tr>
<td>Terms and Conditions</td>
<td>Lists all terms and conditions that are loaded in the system. For more information, see “Managing Terms and Conditions” on page 161.</td>
</tr>
<tr>
<td>Check Avails</td>
<td>Queries simulation data and provides the number of impressions available to be booked or sold during the specified date range for a specified set of targeting or product criteria. For more information, see “Checking the Availability of Inventory” on page 163.</td>
</tr>
<tr>
<td>Alert Settings</td>
<td>Displays workflow-related alert options. For more information, see “Setting Alerts” on page 167.</td>
</tr>
<tr>
<td>Settings</td>
<td>Sets options for the sales workflow. For more information, see “Setting View Options” on page 169.</td>
</tr>
<tr>
<td>Insertion Order Logos</td>
<td>Uploads insertion order logos. For more information, see “Managing Insertion Order Logos” on page 171.</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 2.8 Overview of the Customers Tab

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advertisers</td>
<td>Lists all advertisers that are loaded in the system. For more information, see &quot;Managing Advertisers&quot; on page 175.</td>
</tr>
<tr>
<td>Agencies</td>
<td>Lists all agencies that are loaded in the system. For more information, see &quot;Managing Agencies&quot; on page 181.</td>
</tr>
<tr>
<td>Publishers</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 &quot;Managing Publishers&quot; on page 185.</td>
</tr>
<tr>
<td>Industries</td>
<td>Lists all industry classifications that are loaded in the system. For more information, see &quot;Managing Industries&quot; on page 187.</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 &quot;Managing Regions&quot; on page 189.</td>
</tr>
</tbody>
</table>

### Partners Tab

You use the **Partners** tab to set up the third-party integration. For more information, see "Managing Partners" on page 193.

### Reports Tab

You access the operational reports and Business Intelligence (BI) reports on the **Reports** tab. For more information, see "Managing Reports" on page 197.

### 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>
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<tbody>
<tr>
<td>Settings</td>
<td>Specify targets in the <strong>No Log Targets</strong> field to prevent requests that match from being logged. For more information, see &quot;Settings&quot; on page 17.</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 &quot;Users&quot; on page 19.</td>
</tr>
<tr>
<td>Tab</td>
<td>Description</td>
</tr>
<tr>
<td>-----</td>
<td>-------------</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 Intelligent Advertising for Publishers through a third-party identity provider (IDP). For more information, see “Single Sign-On” on page 23.</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 “Roles” on page 27.</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 “Teams” on page 31.</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 “Currency” on page 33.</td>
</tr>
<tr>
<td>Logs</td>
<td>Enables administrators to view activity history logs for users. For more information, see “Logs” on page 35.</td>
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</table>
### PART 2

**Admin**

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<td>9</td>
<td>Logs</td>
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</tr>
</tbody>
</table>
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.

Create 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.
Users

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. This option overrides the system default time zone for the user. 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 will default to the user’s specified time zone.
Note: The time zone specified for a user takes precedence over the time zone specified for any teams the user is in. A team’s time zone takes precedence over the system’s time zone.

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.
      Note: The default role is the role that is set when a user logs in.

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 .

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.

  **Note**: When a user with a SalesManager or Salesperson role is associated with a user with a trafficker or AdOpsManager role, the associated user’s profile specifies this sales user as its **Associated Salesperson**. If the sales user creates a new proposal, this associated user is listed in the Trafficker field. If multiple users are associated with a salesperson, the proposal Trafficker field lists the last user in the list.

- **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 Intelligent Advertising for Publishers 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 Intelligent Advertising for Publishers 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 Intelligent Advertising for Publishers 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.
Single Sign-On

About Single Sign-On

Single sign-on, also known as SSO, is a way of authenticating users in SAS Intelligent Advertising for Publishers through a third-party identity provider, or IDP. To configure SSO, you must set up the IDP and SAS Intelligent Advertising for Publishers 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 Intelligent Advertising for Publishers.

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 Intelligent Advertising for Publishers.

To set up Okta as an IDP:
Log on to Okta.
Select Add Applications in the Shortcut menu on the dashboard.
Click Create New App.
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 Intelligent Advertising for Publishers, 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.

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 Intelligent Advertising for Publishers. 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 Intelligent Advertising for Publishers 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 Intelligent Advertising for Publishers is converted to an SSO account. A user who has logged on using the SSO service can no longer log on to SAS Intelligent Advertising for Publishers 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 Intelligent Advertising for Publishers.

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:
   - **Name:** The unique name for the SAS Intelligent Advertising for Publishers 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.
   - **Consume url:** This value is set by SAS Intelligent Advertising for Publishers during SSO setup. Provide this URL to the IDP during SSO integration.
   - **Login url:** This value is set by SAS Intelligent Advertising for Publishers 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.
   - **Active:** Select this option to enable users to log on through this SSO.
   - **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.
   - **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 Intelligent Advertising for Publishers.
   - **Refresh duration:** Specify the number of minutes to wait before reverifying the authentication information with the SSO.
     **Note:** The minimum duration is 15 minutes.
   - **Idp sso target url:** Get this information from the IDP.
   - **Idp issuer:** Get this information from the IDP.
IDP Certificate: Get this information from the IDP.

SP Certificate: This information is generated by SAS Intelligent Advertising for Publishers. Provide this certificate to the IDP if you want to use assertion encryption.

Metadata: (Optional) Use this URL to upload IDP information, if the SSO record was created that way.

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 have restricted access to campaigns where they are assigned as a salesperson. They can view all sections except users and creative formats. A user with the Salesperson role can create campaigns, flights, creatives, and customers but cannot delete these items. Users with this role can see only reports for campaigns where they are assigned as the salesperson.

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 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.

d 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. (Optional) You can restrict the team's access to tiers in the Tier Permission section.
   a. Choose Below or Above from the Option list. Select Below to give the team access to the tiers that are below the tier specified in Tier in reports, flights, and products. Select Above to give the team access to all tiers that are above the tier selected.
   b. In the Tier menu, select the tier for the upper or lower limit. Tiers are listed in the order that they are configured. For more information, see “About Tiers”.
   Note: Access does include the selected tier.
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 change the 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 Intelligent Advertising for Publishers. 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.
   d Use the drop-down list from Action to search for activity with a specific action.
   e Use the drop-down list from Changed by to search for activity by a particular user.
   f Click Filter.
PART 3

Ad Traffic

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Managing Campaigns

About Campaigns

The hierarchy of a campaign in SAS Intelligent Advertising for Publishers 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 175.

   Note: By default, the drop-down list is determined by what you enter in the field. You can also use % to specify a wildcard of any length, or _ to specify a wildcard of a single character. You can also use ^<keyword> to search for the keyword at the beginning.
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 181.

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.

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

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

h. 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 43.

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 **Embed Code**. A pop-up window appears with both HSERVER and JSERVER tags to allow trafficking of IA campaigns or flights in other ad-serving systems.

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

To delete a campaign, click **Delete** 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 Intelligent Advertising for Publishers, 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)
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.

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

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.
     Select a size from the Reservation Size list. Reservation sizes allow flights that might be missing a creative to still be included in the forecasting simulation and removed from the available inventory.
   - **Paused**: The flight is paused and 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 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.

8. To set the flight’s general position in the ad queue, select from the Tier list. For more information, see “About Tiers” on page 57.
9 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.

10 Set a **Start date** and start **Time** for the flight.

11 Set an **End date** and end **Time** for the flight.

12 To enable the flight to be served during a specific time window each day, select **Daily Window** and then select a **Start Hour** and an **End Hour**.

13 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.

14 (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.

15 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.

16 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.

17 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 is equivalent to one unit of the base currency.

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

To set up reports to be emailed at specified intervals, expand the Send Reports panel and then do the following:

a. Select when to send flight reports to users.
   - Choose Reports on end to send a flight reports at the end of the campaign.
   - Choose Reports at week end to send a flight report every Monday at midnight.
     Note: The date and time are determined by the time zone used by the application.
   - Choose Reports at month end to send a flight report at midnight the first day of every month.

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.

To include a flight description and notes about the flight in reports, expand the Description panel and then enter information in the Description, Notes, User Info, and External ID fields.

Expand the Goals & Revenue panel and then 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 not calculated per impression but by the amount entered.
  - 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.
  - 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 (ECP) is automatically calculated and displayed in the table.

22 To perform an ad hoc projection of all pre-emptible inventory using the product specified on the flight, expand the **Inventory** panel, and then click **Available**.

**Note:** This calculation incorporates any default ads that appear in the forecast and match the flight's criteria. Results are split into Available, Reserved, Projected, and Served numbers. Contending flights can be used when ad inventory is not available.

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.

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 86.

24 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.

- To append HTML code for a 1x1 image in the server response when a creative is served from the flight, select **Beacon count**. 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 Intelligent Advertising for Publishers.

  Select **Frequency cap based on beacon** to allow 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.
In the **Creative selection method** list, select one of the following methods:

- **Weighted** (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.

- **Sequential**
  
  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 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 pageview might deliver ads 1 and 2, but a refresh of the page might show ad 3 followed by ad 1.

- **CTR Optimized**
  
  The CTR optimized 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.

- **Prioritized**
  
  When this option is selected, the creatives can be sequenced in a particular order similar to the Sequential method. With Prioritized, 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.

In the **Companion type** list, select one of the following types:

- **None** (default)
  
  The companion feature is disabled.

- **Strict**
  
  The strict type requires two or more creatives to be present in the flight. This option enables the “companion” or “roadblock” feature, which provides a method of serving multiple creatives from the same flight to the same page at the same time. Flights with strict specified serve only if you select it as the first ad request on the page. Ad requests come in grouped by a VIEWID and Cookie ID. For example, if you view a page that has five ads, all of the ads on that page have the same VIEWID. If the first ad evaluated matches one of the ads in the companion flight, it is served. However, if the second one in the group does not match, ads from other companion flights are served.

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

Flights containing frequency caps can result in a flight with a Companion Type policy (Strict or Loose) being canceled on the page after serving an ad, causing other flights to deliver to the subsequent ad calls on the page. Strict or Loose flights deliver together consistently when frequency capping is not invoked.

- (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 it.
Note: Contact SAS Technical Support at support@sas.com to set up this option.

(Optional) Using the Delivery patience slide control, you can make adjustments to account for changes in the schedule.

Note: Contact SAS Technical Support at support@sas.com to set up this option.

25 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, since a categorized advertiser does not compete with itself, an advertiser can serve more than once to a given page. Categories are created under the Edit Advertiser section. For more information, see “Edit an Advertiser” on page 177.

26 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, Match Any, Don’t Match All, or Don’t Match Any. Match Any is the equivalent of using the Boolean OR operator. If any of the statements are true, the target matches. Match All is the equivalent of using the Boolean AND operator. All statements must be true for the target to match.

- Don’t Match All is the equivalent of using both the Boolean OR and NOT operators. Don’t Match Any is the equivalent of using both the Boolean AND and NOT operators. For example, if you want to include any of several target site values but 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.

- In the Targets field, search for and select a target. Targets are set up by clicking the Targeting tab and then the Targets tab.

27 In the Rules panel, do the following:

a. Select Match All or Match Any.

b. Select a value or a grouping rule. If you selected a grouping rule, select a value and continue with the next step.

c. Select an operator.

Note: Some operators are unavailable for the selected value.

d. Depending on the value that you selected, enter a value or select from search results in the field.

Note: By default, the drop-down list is determined by what you enter in the field. You can also use % to specify a wildcard of any length, or _ to specify a wildcard of a single character. You can also use ^<keyword> to search for the keyword at the beginning.

e. If you want to add another grouping rule or value, click +.

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

- 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.

- 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.
29 Expand the **Tags** panel.
   - Click the **Custom**, **Geo**, or **Device** tab.
   - 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.
   
   **Note:** If you create multiple tags, every tag and at least one of the values from each has to match in order for the flight to serve.

30 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 50% of a video) and requires you to complete the Action Policies section, whereas standard action tracking does not. Standard action tracking simply requires a value entered in the **Cost Per Action** field 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 a visitor has to trigger the action after having received 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, enter a value for 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**.

31 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:** By default, the drop-down list is determined by what you enter in the field. You can also use % to specify a wildcard of any length, or _ to specify a wildcard of a single character. You can also use ^<keyword> to search for the keyword at the beginning.

32 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** pane, and then enter desired information in the fields and make desired selections. For more information, see "Add a
To preview an added creative, do the following:

- Select the check box next to the desired 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, 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. Clients can request a configuration option called `PreviewHonorsTargeting` that instructs SAS Intelligent Advertising for Publishers to use all the targeting parameters in the ad call on the page.

To edit an added creative, click **Edit** in the row for the creative, make desired edits, and then click **Save Changes**.

The **Tag qualifier** field determines which qualified tags are temporarily switched into the evaluation context while evaluating that creative for serving.

The **Sticky Set Name** field enables 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.

**Note:** To edit multiple creatives, click the check box for 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.

To view the passback URL for an added creative, click **Embed Code** in the row for the creative. For more information, see “About Passback URLs” on page 50.

**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.

To remove an added creative, click **Edit** in the row for the creative, and then click **OK**.

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**.

You can copy and send tag information for the flight by clicking **Embed Code**. 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.

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### About Passback URLs

Passback behavior is triggered by a network redirecting to SAS Intelligent Advertising for Publishers 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 Intelligent Advertising for Publishers 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 in the row for a flight.

- To view the history of changes to a flight, click in the row for a flight. The Edit **flight name** page appears. Click **View History**. Changes to the flight are annotated.

- 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 43.

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 Click on the name of a flight or click : The Edit **flight name** page appears.

4 Refer to “**Add a Flight to a Campaign**” on page 43 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.
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 **Embed Code**. 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.

---

**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.
   
   **Note:** You can modify only the **Start date**, **End date**, **Tier**, **Type**, **Top priority**, and **Beacon count** fields in the Update Selected Flights window.
6. Refer to “Add a Flight to a Campaign” on page 43 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 ![trash can] and then click **OK**.
Managing Tiers

About 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 Figure 12.1 on page 58, 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 54. 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 54. 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.

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.

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 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, unlike a Weighted tier in which the ad server remains in the tier 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).

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, 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.
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**.
   - 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.
   - Select **Private Marketplace** for Rubicon integrations. For more information about using **Private 
   Marketplace** and **Biddable** and configuring the deal types in **Rubicon Deal Prioritization**, 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.
   - 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.
   - 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**
     - When this option is selected, SAS Intelligent Advertising for Publishers 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 lingers 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 as they have more opportunities to serve before the engine drops to the next tier.

- Eliminate Duplicate Flights
- Eliminate Duplicate Advertisers

Note: When you select Eliminate Duplicate Flights or Eliminate Duplicate Advertisers, SAS Intelligent Advertising for Publishers 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 to SAS Intelligent Advertising for Publishers, and it could then 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 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 Edit tier-name tier page appears.

4 Enter information in the Name field.

5 Select Active or Pre-emptible or both.

Note: Selecting Pre-emptible allows the inventory allocated for this tier to be available when calculating the available inventory for a Sales Proposal. In other words, 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.

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.

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.

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
- Eliminate Duplicate Flights
- Eliminate Duplicate Advertisers

If you want to update the tier weight for the flights associated with the tier, click Flights, enter a value in the box in the Tier Weights column, and then click Change Flight Weight.

(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.

Click Update.

---

**Rank Tiers**

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 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 alphanumeric 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: To configure the user interface for the Debug Ad Request so that access to Personally Identifiable Information or PII is restricted, contact SAS Technical Support. By default, the user interface allows access to PII.

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.
   
   Note: You can customize the Cookie and User Agent, and Referer values if needed. If you do not enter a mid= cookie value, you need to select Run twice as 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).

4. From the Trace list, select Normal Ad Selection or All Ad Selection. The Normal Ad Selection option returns session information as well as the reasons a flight or creative is selected or not selected. The All Ad Selection option returns evaluation information and all flights or creatives that match the targeting.

5. Click Run.

   The information in the Cookie field might be updated and a return code and results appear at the bottom of the page.
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 \[ and then click OK.
PART 4

Ad Creative

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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.

   **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.

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.
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.

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 85.

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

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

---

**Preview 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:
   - Enter a portion of the creative name in the **Name like** field.
   - Search for an **Advertiser** for the creative.
     - **Note**: By default, the drop-down list is determined by what you enter in the field. You can also use % to specify a wildcard of any length, or _ to specify a wildcard of a single character. You can also use ^<keyword> to search for the keyword at the beginning.
   - Select a **Creative Format** from the drop-down list.
   - Specify a **Size** for the creative.
   - Set a **Date added after** to find creatives that were created after your specified date.
   - Click **Filter**.

3. Click in the row for the creative to preview the creative. Click **Close**.

**Note**: If you are assigned the advertiser role and an advertiser is specified in your user profile, click **View My Creative** to display the creatives that are assigned to the specified advertiser. If you are not assigned to the advertiser role or an advertiser is not specified in your profile, this action does not return any creatives.

---

**Edit a Creative**

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

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

3. 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.
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. 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.

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 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 85.

7 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.

8 (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 75.

9 (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 76.

10 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 ![icon](image.png) in the row for the creative.

3 In the **Flights** panel, click on the ![icon](image.png) 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 76.

7 If you want to apply date restrictions or special targeting options to the creative, click the ![icon](image.png) in the row for the flight, enter information in the fields, and then click **Save Changes**.

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

9 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 73.

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.

   The Tag qualifier field determines which qualified tags are temporarily switched into the evaluation context while evaluating that creative for serving.

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 50.

   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 Creative

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 “Managing Name Patterns” on page 83.
5. Enter information in the Constant Creative Name field, and then select Pre-pend 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 Pre-pend 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 Pre-pend 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.
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 73.
Managing Name Patterns

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 “Managing Smart Upload” on page 81.

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] 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] and then click **OK**.
About Creative Formats

Creative formats provide a convenient way of formatting the look and function of creatives that are delivered through SAS Intelligent Advertising for Publishers. 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.

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 Intelligent Advertising for Publishers 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 Intelligent Advertising for Publishers 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 “Managing Snippets” on page 133.
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 86.
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 one of the following template sources:
    - Upload
    - Text
    - Network
11. If you selected the Upload template source, do the following:
a From the MIME Type list, select `application/javascript`, `application_xml`, `JS`, `text_html`, `text_javascript`, or `xml`.

Note: You can create your own MIME types. For more information, see “Add a MIME Type” on page 93.

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

c Continue with step 15.

12 If you selected the **Text** template source, do the following:

a From the MIME Type list, select `application/javascript`, `application_xml`, `JS`, `text_html`, `text_javascript`, or `xml`.

b 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.

c Continue with step 15.

13 If you selected the **Network** template source, do the following:

a From the MIME Type list, select `application/javascript`, `application_xml`, `JS`, `text_html`, `text_javascript`, or `xml`.

b From the Request Method list, select GET or POST.

c Enter the network URL in the Request URL field.

d Enter information in the Request Headers field.

e 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.

f 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.

g 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'%%`).

14 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 the Creative Format name or click in 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 in 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 “Managing Snippets” on page 133.
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 86.

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 field, select one of the following template sources:
   - Upload
   - Text
Network

9 If you selected the **Upload** template source, do the following:
   a. From the **MIME Type** list, select **application_xml** (application/xml), **JS** (application/javascript), or **xml** (application/xml).
   b. Click **Choose File**, navigate to the file that you want to upload, and then click **Open**.
   c. Continue with step 13.

10 If you selected the **Text** template source, do the following:
   a. From the **MIME Type** list, select **application_xml** (application/xml), **JS** (application/javascript), or **xml** (application/xml).
   b. Enter information in the **Text** box.
   c. Continue with step 13.

11 If you selected the **Network** template source, do the following:
   a. From the **MIME Type** list, select **application_xml** (application/xml), **JS** (application/javascript), or **xml** (application/xml).
   b. From the **Request Method** list, select **GET** or **POST**.
   c. Enter the network URL in the **Request URL** field.
   d. Enter information in the **Request Headers** field.
   e. From the **Response Type** list, select **HTML**, **JSON**, or **XML**.
   f. Enter information in the **Response Template** field.
   g. 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"%%`).

   12 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 ![Creative Format icon](image). 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 89.

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.
PART 5

Ad Targeting

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Managing Targets

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.

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). 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 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.
Day of Week  
The specific day of the week can be targeted. This uses the day of week on the server, not the visitor.

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 on the Events field and then select the event from the autosearch results.

LVal=”EVENT.MYEVENETNAME” 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 86400 and 172800 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  
The following tags are based on geotargeting values found for the visitor:  
- City  
- Conn Speed  
- Country  
- ISP name  
- Metro Code  
- Proxy description  
- Proxy type  
- Region
- SIC code
- ZIP code text

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.

**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, 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**
Other targets that are set up in the system can be referenced in other targets.

**Time**
A target can include a specific time or range of times. Note that this uses the time of the server, not the visitor. The values specified do not roll over to the next day. In other words, specifying **Time Between 23:00 and 01:00** does not target 11 p.m. to 1 a.m. the next day. Likewise, targeting **Time Before 02:00** does not include anytime prior to midnight.

**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.

---

**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. Select **Match All, Match Any, Don't Match All, or Don't Match Any**.
**Match Any** is the equivalent of using the Boolean OR operator. If any of the statements are true, the target matches. Match Any requires that any of the targeting elements can be matched (meaning, the ad request contains a left value and right value that is also in the target), and the flight are eligible to serve to that request. **Match All** is the equivalent of using the Boolean AND operator. All statements must be true for the target to match. Match All requires that all of the targeting elements in the target must match what is specified in the ad call.

**Don't Match All** is the equivalent of using both the Boolean OR and NOT operators. **Don't Match Any** is the equivalent of using both the Boolean AND and NOT operators. 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 any of several target site values but 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.

The Don't Match Any operator is the negation of the Match Any operator. It evaluates as “false” when one of the targeting statements is true on an incoming ad request. The Don't Match All operator is the negation of the Match All operator. It evaluates as “false” when all of the targeting statements are true on an incoming ad request.

7 Select a grouping rule or a left value. If you select a grouping rule, select a left value and continue with the next step.

8 Select an operator.

   **Note:** Some operators are unavailable for the selected left value.

9 Depending on the left value that you selected, enter a value or select from search results in the field.

   **Note:** By default, the drop-down list is determined by what you enter in the field. You can also use % to specify a wildcard of any length, or _ to specify a wildcard of a single character. You can also use ^<keyword> to search for the keyword at the beginning.

10 If you want to add another grouping rule or left value, click the green plus sign icon.

11 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 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 desired edits in the Name and Description fields.

   For information about editing an event, see “Edit an Event in a Target” on page 101.

5 Modify the targeting values as desired. For some left values, you can click click to edit to edit the fields. Once the desired values have been entered, click Save & Close.

6 Click Update.

---

**Edit an Event in a Target**

1 Click next to an event. The Event Occurrences and Time Periods window appears.

2 Enter a value in the Occurrences field.

3 Select Relative Dates, Absolute Dates, Any Dates, or Session.
   - If you selected Relative Dates, enter values in This event start and This event end fields. The values represent seconds.
   - If you selected Absolute Dates, enter time and date values (or click the calendar icon to select the values) in the Start Date and End Date fields.

   Note: Absolute dates use the time zone for the flight.

---

**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 43.

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

2 Click the Targets subtab.

3 In the row for a target, click . The Update Target page appears.

4 To make edits to the target, follow the instructions in “Edit a Target” on page 100.

---

**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 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 Intelligent Advertising for Publishers 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 Intelligent Advertising for Publishers. 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. Tags must not start with a numeric value.

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 “Managing Tag Groups” on page 105.
To enable logging for the tag in the Tags Report, select **Tagsum logging**. For more information, see “About Operational Reports” on page 203.

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 ![expand arrow] 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.

5 To enable tagsum logging, select **Tagsum logging**.

6 Click **Update**.

7 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.

8 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 ![trash can] 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 103.

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 \( \text{ } \) 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 \( \text{ } \) 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: By default, the drop-down list is determined by what you enter in the field. You can also use % to specify a wildcard of any length, or _ to specify a wildcard of a single character. You can also use ^<keyword> to search for the keyword at the beginning.

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 in 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 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.
5. 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 ![Edit button](image) 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 ![Trash can](image) 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.
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.

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 the trash can icon 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 ![trash can] and then click **OK**.
Managing Placements

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 about partners, see Partners on page 193.

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

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

8 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 will be 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 57.

9 (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.

10 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 ![icon] 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 a **Size**. Placement size must be mapped on the partner page or ads will not serve.

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

8 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.

9 (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.
10 Select or delete any associated Sites.

11 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.

12 On the Floor Prices tab, the name, target and size information is listed.

   Click the ellipsis (...) button beside Placement Bidding to set different floor price for each partner included in the placement. 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 57.

13 Click Update.
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 %. 

Delete an Event

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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.
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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 Edit. The Edit Media page appears.
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.

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.

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 74.

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 93.
   c. Enter information in the Template Text box.
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 93.
   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 begin 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 Intelligent Advertising for Publishers 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.

**Note:** Appending :URLENCODED (for example, %%%DATETIME:URLENCODED%%) will URL-encode the token value. Appending :URLDECODED will decode a URL-encoded string.

<table>
<thead>
<tr>
<th>Token</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%%ALTIMAGE%%</td>
<td>The string that was entered in the Alt Image field for a creative.</td>
</tr>
<tr>
<td>%%ALTTEXT%%</td>
<td>The string that was entered in the Alt Text field for a creative.</td>
</tr>
<tr>
<td>%%BASEURL%%</td>
<td>URL pointing to the client's ad server (for example,<a href="http://crtl.aimatch.com/%7Bclient-shortname%7D">http://crtl.aimatch.com/{client-shortname}</a>).</td>
</tr>
<tr>
<td>%%BEACONURL%%</td>
<td>The URL added to the creative code returned to the page that instructs SAS Intelligent Advertising for Publishers to increment the impression count. Note: this token requires an img src= HTML tag. This token returns only the beacon counting URL itself, and would be used in contexts that call it appropriately, such as in an image tag. <strong>Note:</strong> This token requires an img src= HTML tag to be prepended to the URL.</td>
</tr>
<tr>
<td>%%CLICKURL%%</td>
<td>A click URL that points to the SAS Intelligent Advertising for Publishers ad server for click-counting and returns the entered click URL that you entered for the creative to the browser for relocation.</td>
</tr>
<tr>
<td>%%CLICKDESTINATIONURL%%</td>
<td>A click URL that returns the destination URL specified in a creative's Click URL field.</td>
</tr>
<tr>
<td>%%CRTUINFO%%</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 (the subdomain name for the client's user interface).</td>
</tr>
<tr>
<td>%%DATE%%</td>
<td>Date value when passed in after the /date= tag in an ad call.</td>
</tr>
<tr>
<td>%%DATETIME%%</td>
<td>Current date and timestamp value in the format YYYY-MM-DD HH:MM:SS.</td>
</tr>
<tr>
<td>%%DURATIONS%%</td>
<td>The ad's display duration value in seconds (for example, 60].</td>
</tr>
<tr>
<td>Token</td>
<td>Description</td>
</tr>
<tr>
<td>-------</td>
<td>-------------</td>
</tr>
<tr>
<td>%%DURATIONHMS%%</td>
<td>The ad's display duration value in HH:MM:SS format (for example, 01:30:00, indicating 1 hour and 30 minutes).</td>
</tr>
<tr>
<td>%%FCID%%</td>
<td>The unique flight creative ID, or FCID, value for a creative that links the creative to a flight.</td>
</tr>
<tr>
<td>%%FLIGHTID%%</td>
<td>The unique integer value for 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>%%GENERIC%%</td>
<td>The string passed in on an ad call between the string /generic= and the next /.</td>
</tr>
<tr>
<td>%%GEO_CITY%%</td>
<td>The visitor's city.</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 assigned to the creative when a size is assigned to it.</td>
</tr>
<tr>
<td>%%MEDIA%%</td>
<td>The string that was entered in the Media field for a creative.</td>
</tr>
<tr>
<td>%%MID%%</td>
<td>The visitor's SAS Intelligent Advertising for Publishers cookie value.</td>
</tr>
<tr>
<td>%%PATH%%</td>
<td>The pathinfo string passed in on an ad call between http:// and ? in the URL.</td>
</tr>
<tr>
<td>%%PRECLICKURL%%</td>
<td>The click URL that points to the SAS Intelligent Advertising for Publishers ad server for click-counting followed by the string relocate=. This string enables a click URL to be appended so that SAS Intelligent Advertising for Publishers can issue a relocate URL. It is useful for third-party ad servers to append a click destination while enabling SAS Intelligent Advertising for Publishers to count the click.</td>
</tr>
<tr>
<td>%%QUERY%%</td>
<td>The query string passed in on an ad call after the ? in the URL.</td>
</tr>
<tr>
<td>%%RANDOM%%</td>
<td>The random number passed in on an ad call after the string /random=.</td>
</tr>
<tr>
<td>%%REFERER%%</td>
<td>The URL of the page containing the ad call URL.</td>
</tr>
<tr>
<td>Token</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>%%TIERNANE%%</td>
<td>The name of the tier the partner is competing on.</td>
</tr>
<tr>
<td>%%TIME%%</td>
<td>Time value when passed in after the /time= tag in an ad call.</td>
</tr>
</tbody>
</table>

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 87.

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 http://crtl.aimatch.com/customername/hserver/site=toycatalog/size=728x90/toys=boardgame URL. The creative content can then use the token `%%TOYS%%` to get the associated value boardgame:

```html
<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, replacementStrings%%` 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

Code 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 tab.

Add a Snippet

1 On the top navigation bar, click the Assets tab.
2 Click the Snippets tab.
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_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 93.
   c Enter information in the Template Text box.
8 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 filename 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, 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 93.
   c. Enter information in the **Template Text** box.
7. Click **Update**.

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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Managing RFPs

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 137.
   - 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 ![Trash can] and then click **OK**.
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 of 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 Enter information in the Notes field.

29 Enter information in the Internal Notes field.

30 Select an Asset to associate with the proposal.

31 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 147 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 144.
Add a Line Item

1. Enter information in the **Name** field.
2. Select a **Start date** and **Time** for the line item.
3. Select an **End date** and **Time** for when the line item should end.
4. Select a **Currency** from the list.
5. 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 and then do the following:
   a. Select **Match Any** or **Match All**.
   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**.
6. 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.
7. From the **Size** list, select an ad size.
8. Enter a value in the **Additional fees $** field and add a **Fee description**.
9. (Optional) Set a price adjustment for the flat rate or the CPM rate.
   Note: This field is disabled by default. Contact SAS Technical Support at support@sas.com to enable this option.
   a. Select an **Adjustment Type** to change the rate.
      ■ If the adjustment type is **Currency ($ 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.
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 is equivalent to one unit of the base currency.

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

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.

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.

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

- If the line item is converted to a flight that is in a tier that uses weighted prioritization or share of voice prioritization, **Share/Weight** displays the value of the tier prioritization.
- 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.
  - Enter a value in the **Goal** field for impressions, 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.
  - Enter a value in the **Bonus** field for impressions, 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 impression, click, or action, select **Cost Per** and then do the following:
  - Enter a value in the **Cost Per** field for impressions, 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.
  - Enter a value in the **Goal** field for impressions, 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.
  - Enter a value in the **Bonus** field for impressions, 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 Estimated Cost Per **ECP** is calculated automatically and displayed in the table.

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.

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 157.

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 86.

17 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
   - From the **Targets group logic** list, select **Match All** or **Match Any**.
     
     **Match All** and **Match Any** are options used to determine how multiple targets are handled. **Match All** and **Match Any** correspond to the Boolean logic operators AND and OR. You select **Match All** to specify that all targets must match in order for the flight to serve. You select **Match Any** to specify that only one of the targets needs to match in order for the flight to serve.
   
   - In the **Target** field, search for and select a target. Targets are set up by clicking the **Targeting** tab and then the **Targets** tab.

b In the **Rules** panel, do the following:
   - Select **Match All** or **Match Any**.
     
     **Match Any** is the equivalent of the Boolean OR operator. If any of the statements are true, the target matches. **Match All** is the equivalent of the Boolean AND operator. All statements must be true for the target to match.
   
   - Select a left value or a grouping rule. If you selected a grouping rule, select a left value and continue with the next step.
   
   - Select an operator.
     
     **Note:** Some operators are unavailable for the selected left value.
   
   - Depending on the left value that you selected, enter a value or select from search results in the field.
     
     **Note:** By default, the drop-down list is determined by what you enter in the field. You can also use % to specify a wildcard of any length, or _ to specify a wildcard of a single character. You can also use ^<keyword> to search for the keyword at the beginning.
   
   - If you want to add another grouping rule or left value, click +.

c In the **Tags** panel, do the following:
   - Click the **Custom**, **Geo**, or **Device** tab.
   
   - Select a tag name from the list and then select the desired values. If you select multiple values, any of the values match.
   
   - Click **Add Tag**.
   
   - To add more tags, repeat steps 1–3.
**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.

---

**Note:** If you create multiple tags, every tag and at least one of the values from each has to match in order for the flight to serve.

d In the **Sites & Areas** panel, do the following:

i 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**.

ii 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**.

e 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.

f You can click **Add New Label** or **Add Label Value**. For more information, see “About Labels” on page 69.

18 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.

19 In the **Other** panel, enter information in the **Notes** and **External ID** fields.

20 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**.
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.

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 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 144. 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 .
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 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 86.

24 In the **Teams** panel, select the teams to whom you would like to assign the 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 86.

In the Teams panel, select the teams to whom you would like to assign the product.

Enter information in the Internal Notes field.

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 144. Otherwise, continue with the next step.

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 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**.
7 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 ![delete 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.
About Checking Inventory Availability

SAS Intelligent Advertising for Publishers enables you to search for all pre-emptible inventory in the forecast that matches the flight's targeting and flight dates. Pre-emptible refers to any flight sitting in a tier with the Pre-emptible option selected and represents the available inventory in a simulation. 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 “Managing Tiers” on page 57. Note that this calculation takes into account any default ads that appear 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 results returned are split into Available, Reserved, and Served numbers:

- **Available** – displays 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, then the number returned shows the availability for the remaining time period.

- **Reserved** – displays the number of impressions that the current flight or line item is projected to serve. If checked after the start date, the number returned shows what is projected for the remaining time period. Reserved is calculated as the difference between that estimated availability and the contending flights total, so it might not match the amount the flight is actually forecast to serve when a frequency cap is involved.

- **Served** – displays the number of impressions the flight has served through the current date.

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

7 Select a **Size** from the list.

8 If you want to check the availability of flights for other products, 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. Select the tag name and then the values desired. If multiple values are selected, any of the values can match.
   
   b To add more tags, click **Add Tag** and repeat this step.

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:
   
   a In the **Frequency Caps** table, enter a value in the **Quantity** field to specify the number of impressions, clicks, or conversions to use as filters.
   
   b In the **Frequency Caps** table, 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 In the **Frequency Caps** table, 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 In the **Frequency Caps** table, 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 xslx**.

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**.
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 177.

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 169.

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 163.

Price
  triggered if a line item is booked below the assigned product's floor price. For more information, see “About Products” on page 151.
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 generated.
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.
If you want to allow PDF exports only on proposals that can be converted to a campaign, select **Restrict PDF Export on Unconvertable Proposal**.

Enter information in the **Bill Direct Label** field to create a label that will be displayed in the advertiser window.

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 windows.

If you want to add a proposal logo, click **Choose File**, navigate to the desired JPEG or PNG file and then click **Open**.

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.

In the **Proposal Template** list, select **Default** or **Custom**.

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.

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.

Enter a value in the **Proposal high value threshold** field.

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.

Click **Save**.
Managing Insertion Order Logos

About Insertion Order Logos

SAS Intelligent Advertising for Publishers 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 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 🗑️ 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.

You create advertiser categories in order to 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. In other words, a categorized advertiser does not compete with itself. Note that an advertiser can serve more than once to a given page view. In this context, Page view refers to a sequential set of ad calls with the same /viewid= value.

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 pre-define 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 53 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 Intelligent Advertising for Publishers.
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 “Managing Industries” on page 187.

8 Select an item from the **Region** list.

   The BI reports group advertisers by region. For more information about regions, see “Managing Regions” on page 189.

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 “Managing Terms and Conditions” on page 161.

   **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 “Managing Custom Actions” on page 65.

   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 175.

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 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 terms 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 175.

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 Intelligent Advertising for Publishers.
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. 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 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
Intelligent Advertising for Publishers.

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 175.

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 Intelligent Advertising for Publishers 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 🗑️ 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 ![Delete Industry](image) 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-trash and then click OK.
Ad Partners

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Managing Partners
Managing Partners

About Partners

Partners are third parties that can communicate directly with ad engines within SAS Intelligent Advertising for Publishers in order to provide real-time bidding during ad serving. SAS Intelligent Advertising for Publishers supports PubMatic, Rubicon, and AppNexus as partners. 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 Intelligent Advertising for Publishers 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 Intelligent Advertising for Publishers Platform Integration Guide.

Modify Settings for AppNexus

1. On the top navigation bar, click the Partners tab.
2. Click the AppNexus subtab.
3. Click the Size Mappings tab.
4. Enter a network size in each size field as needed.
5. Click Save Sizes.
6. Click the Target tab.
7. If you want to change the existing target, click the X next to the target name, enter the first few letters of another target, select the target from the autosearch results, and then click Save Target.
8. Click the Site Mappings tab.
9 Enter a site in each site field as needed, and then click **Save Sites**.

### Modify Settings for PubMatic

1 On the top navigation bar, click the **Partners** tab.
2 Click the **PubMatic** subtab.
3 Click the **Size Mappings** tab.
4 Enter a network size in each size field as needed.
5 Click **Save Sizes**.
6 Click the **Tier Floor Prices** tab.
7 Enter a bid floor price per size per tier in the fields as needed. Tiers are ordered by their ranks.
8 Click **Save Tiers**.
9 Click the **Target** tab.
10 If you want to change the existing target, click the X next to the target name, enter the first few letters of another target, select the target from the autosearch results, and then click **Save Target**.
11 Click the **Site Mappings** tab.
12 Enter a site in each site field as needed, and then click **Save Sites**.

### Modify Settings for Rubicon

1 On the top navigation bar, click the **Partners** tab.
2 Click the **Rubicon** subtab.
3 Click the **Size Mappings** tab.
4 Enter a network size in each size field as needed.
5 Click **Save Sizes**.
6 Click the **Target** tab.
7 If you want to change the existing target, click the X next to the target name, enter the first few letters of another target, select the target from the autosearch results, and then click **Save Target**.
8 Click the **Site Mappings** tab.
9 Enter a site in each site field as needed, and then click **Save Sites**.

**Note:** Rubicon also requires the use of placements. For more information, see “Managing Placements” on page 117.
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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.
Managing BI Reports

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 can help 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.

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:

**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 a 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 will 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.

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.

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.
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 only report 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 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.

Performance provides a general overview of what advertisers, campaigns, flights, and creatives served within the specified criteria (report options). Impressions, views, clicks, actions, click rate, and action rate are the displayed metrics. Unlike the Advertiser’s and Publisher’s reports, the Performance report can be filtered to specific tiers, campaigns, flights, and creatives.

Note: The breakdown option is available only when the report is exported to CSV or XLSX.

Product is the only report that displays future, or projected, data. The results of the report show products and the flights that could serve to the demographic in the product. Projected impressions are displayed along with available inventory amounts.

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 Intelligent Advertising for Publishers.

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 Intelligent Advertising for Publishers, 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. Note that the site filter that can be applied to the report filters against 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.

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.