BIDSWITCH

Onboarding to Deals Discovery

Welcome aboard!

Deal Discovery and Activation Checklist

☑ Find deals to activate by exploring discoverable deals from your active trading pairs. Filter deals based on campaign KPIs or needs

☑ Preview and Activate deal

☑ Copy a Deal ID from the UI or export a list of Deals through Bulk Management in order to start bidding on these deals

☑ Start bidding on deals

☑ Manage and troubleshoot deals in Deals Management

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Discover deals to activate

1 Access Deals Discovery from the Deals Center dropdown on the left-hand navigation bar

2 The Deals Discovery Dashboard shows all discoverable one-to-many deals from your active SSP partners.
Deal status: *Activated/Not Activated/ Paused/Archived* reflects deal discovery status that can be controlled by SSP and DSP Partners from either side

3 Filter deals by dimensions such as creative type, auction, country, inventory type, device type, and more, or type the Deal name or ID in the search box. BidSwitch provides avails forecasting metrics that can be used for filtering

💡 Note: If you are not seeing any deals on the Deals Dashboard, this means no deals are available from your active trading pairs. Please contact your BidSwitch account manager to identify other deal opportunities

Preview and activate deal

1 Once a deal has been selected, review deal info, including more detailed forecasting metrics from BidSwitch and deal specs provided by the Deal Owner (SSP Partner).

2 To activate a deal, press the "Activate" button. This will allow you to filter this deal on the Deals Discovery Dashboard

3 Deal ID can be copied from this screen and added to the DSP

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Deal Name ✕

Forecasting

BidSwitch Weekly Avails	Average eCPM	Average Win Rate
9.573 K	$1,365.00	More buying needed for present forecasting

Ads.txt Status — More buying needed for present forecasting

Ad Type — 44.38% Audio 32.95% Display

Country — 91.61% United States

Device Type — 45.01% MediaCenter

Inventory Type — 97.45% Website 63.82% Application 45.26% Digital Out of Home

Basic Info

Deal Name	Example Deal ABC
3 Deal ID	DEAL-12345
Creative Type	Native
Timeframe	May 17, 2023 – May 17, 2024
Auction Type	Fixed Price
Price	$35.13

Activation Settings

Specify the Buyers that should have access to this deal: [All]   [Selected]

Inventory summary

Supply Partner	Supply Partner A
Publishers	amet, molestiae, nesciunt, non, officiis, unde, velit, veritatis, voluptatum
Underrepresented group	Asian owned
Publisher contact	rxycgq@ship.edu

2 [Activate deal] [Close] Once a Deals Discovery Deal is Activated, it will be presented and managed in the Deal Sync environment.

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Export deal and start bidding

1 Use the "Bulk Management" button on top of the Deals Dashboard to download the list of deals for activation as a xlsx file.

2 Download all discoverable deals or a filtered list based on the filters you've applied

3 Best practice: Within the xlsx file, mark all deals that you plan to buy as "Active" and then re-upload the file to the BidSwitch UI for better tracking

4 Once you've downloaded the deals, you can start bidding in the DSP
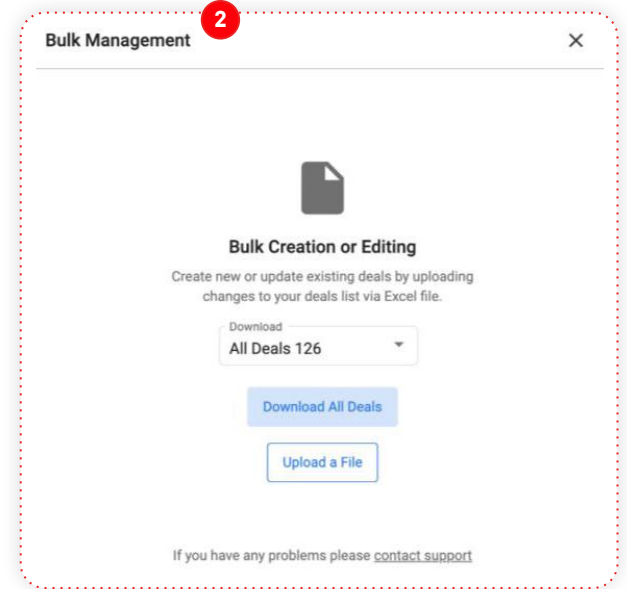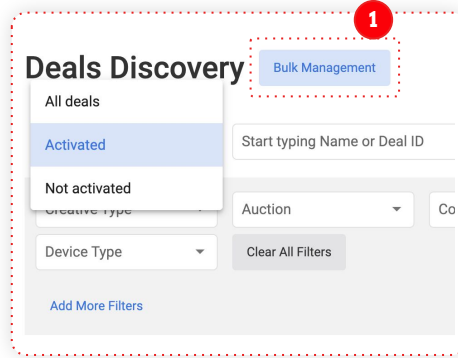
Pro Tip: Add your new deal IDs to your deals Targeting Groups

1 Navigate to the Targeting Groups section of the UI

2 Open your Targeting Group that manages your deal whitelist

3 Update your list of targeted deals to include your newly activated Deals Discovery deals

💡 Note: If your Deals Discovery deals are **not** added to a deals-specific Targeting Group, open exchange SmartSwitch rules apply. You will receive a small amount of traffic for active deals and the QPS will scale up as you begin buying on a specific deal

Manage and troubleshoot deals in the Deals Management Dashboard

1 Once the Deals have been activated in the DSP, navigate to the Deals Management tab in the Deals Center section to manage deal status

Deals that have been set as "Active" in the Deals Discovery tab will appear in the Deals Management tab

2 Tick the checkbox to filter only for Deals activated through Deals Discovery

3 Preview Deal info and status. Access detailed deals info and manage status by clicking on deal title

💡 Note: "Status" in the Deals Management dashboard reflects deal trading status, while "Status" in the Deals Discovery dashboard reflects deal activation status. Deal trading should be managed in the Deals Management Dashboard only

💡 Note: Clicking on the Bulk Management button will download the template for 1:1 deals management via Deals Sync

Deals reporting will show trading details

1 Monitor your trading in Deals Reporting

2 Export details on one or many deals

3 Dig into deal stats
(e.g. invalid requests, no respond reason, etc.) to troubleshoot if trading is not as expected

API Information

- Deals Discovery is also available via an API if you'd prefer to sync deals automatically

- Please note that the Deals Discovery API uses a different endpoint than Deals Sync and some different fields

- You can find information about the API in our docs portal [here](#)

- Reach out to your account manager if you'd like to set up a meeting to learn more

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Thank you.