



BID SWITCH

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




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

The screenshot illustrates the BidSwitch interface for discovering deals. It is divided into three numbered sections:

- 1** Navigation menu: A sidebar on the left with the BidSwitch logo and a menu including Supply Partners, Targeting Groups, Deals Center (with Deals Discovery selected), Deals Management, Deals Reporting, Reporting, Settings, and Users.
- 2** Deals Table: A table listing four example deals with their status, ID, partner, timeframe, creative type, price, and auction type.
- 3** Filter section: A search bar and several dropdown filters for Creative Type, Auction, Country, Inventory Type, and Device Type, with an option to add more filters.

Name	Status	Deal ID	Supply Partner	Timeframe	Creative Type	Price	Auction Type
Example Deal ABC	ACTIVATED	DEAL-12345	Supply Partner A	May 17, 2023 – May 17, 2024	Display	\$94.01	Second Pric
Example Deal DEF	NOT ACTIVATED	DEAL-23456	Supply Partner B	Jun 2, 2023 – Jun 2, 2024	Audio	\$23.07	Second Pric
Example Deal GHI	ACTIVATED	DEAL-34567	Supply Partner C	May 17, 2023 – May 16, 2024	Video	\$85.41	Second Pric
Example Deal JKL	NOT ACTIVATED	DEAL-45678	Supply Partner D	May 17, 2023 – May 17, 2024	Native	\$41.41	First Price

 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

1 Deal Name

Forecasting

BidSwitch Weekly Avails: 9,573 K | Average eCPM: \$1,365.00 | Average Win Rate: More buying needed for present forecasting

Ad 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
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:

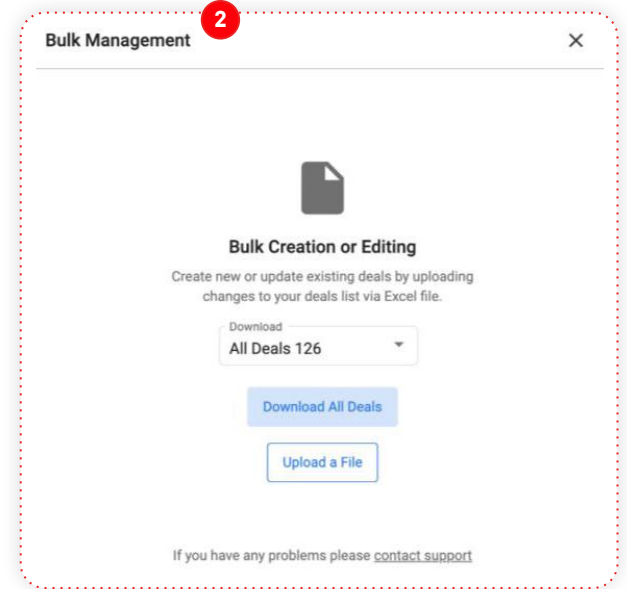
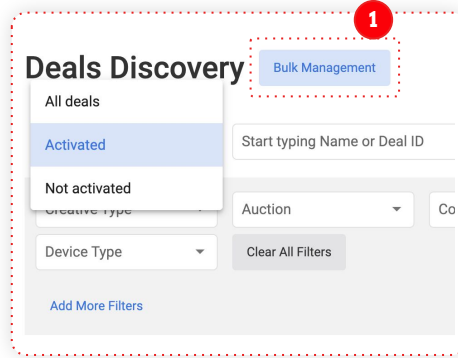
Inventory summary

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

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

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

The screenshot shows the 'Supply Partners' interface with the 'Targeting Groups' section selected. A table lists existing targeting groups with columns for ID, Name, Partners, SmartSwitch, and QPS Limit. A red circle '2' highlights the 'General: US IOW Suj' group. A modal window titled 'Deals Filtering' is open, showing a 'Filtering Mode' dropdown set to 'Include' and a list containing 'GRID-85357'. A red circle '3' highlights the 'Include List' section. Below the list are buttons for 'Upload new list', 'Delete list', and 'Download', along with instructions: 'Suitable formats are .csv and .txt. Each item in a single row. Limit: less or equal 25,000 rows. Deal IDs are case sensitive.' At the bottom of the modal are 'Save Changes' and 'Cancel' buttons.

ID	Name	Partners	SmartSwitch	QPS Limit	Config
308	Example Deal ABC	Supply Partner A	× Off	× Off	⋮
744	Example Deal DEF	Supply Partner B	× Off	× Off	⚙️
1189	General: US IOW Suj	Supply Partner B			
1356	Client: DealerX BidC	All			
1357	Client: DealerX Bidd	All			

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

The screenshot shows the Deals Management dashboard. On the left is a navigation menu with 'Deals Management' highlighted. The main area has a 'Deals Management' header with a 'Bulk Management' button. Below the header is a filter section with a dropdown for 'All Deals 38', a search bar for 'Start typing Name or Deal ID', and a checkbox for 'Only Deals Discovery deals'. A table below lists deals with columns for Name, Status, Deal ID, SSP, Timeframe, and Private Auction. Red callouts 1, 2, and 3 point to the 'Deals Management' menu item, the filter checkbox, and a deal title respectively.

Name	Status	Deal ID	SSP	Timeframe	Private Auction
Example Deal ABC	REVIEW	DEAL-123456	Supply Partner A	May 15, 2023–Jan 1, 2036	Private Auction
Example Deal DEF	REVIEW	DEAL-234567	Supply Partner B	May 30, 2023–Jan 1, 2036	Private Auction
Example Deal GHI	REVIEW	DEAL-345678	Supply Partner C	May 24, 2023–Jan 1, 2036	Private Auction
Example Deal JKL	REVIEW	DEAL-456789	Supply Partner D	May 24, 2023–Jan 1, 2036	Private Auction
Example Deal MNO	REVIEW	DEAL-567890	Supply Partner E	May 24, 2023–Jan 1, 2036	Private Auction
Example Deal PQR	REVIEW	DEAL-678901	Supply Partner F	May 3, 2023–Jan 1, 2036	Private Auction

💡 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

The screenshot displays the 'Deals Reporting' interface. On the left, a navigation menu is shown with 'Deals Reporting' highlighted. The main content area features a 'Deals Reporting' header, a 'Date Range' filter set to 'Jun 14, 2023 - Jun 14, 2023', and an 'Export Report' button. Below this, there are filters for 'Demand Partner' (set to 'Demand Partner A') and 'Deal ID' (set to 'DEAL-123456'). A table lists deal statistics:

Deal ID ↓	Seat ID	Demand Partner	Private Deal	Bid Requests	Bid Responses	Imps	Revenue	Bid eCPM	Win Rate
DEAL-123456	16	Demand Partner A	Yes	87,420	5,580	0	\$0.00	\$0.69	0.00%

At the bottom of the table, it shows 'Items per page: 10' and '1 - 1 of 1'. A 'Troubleshooting' modal is open, showing 'Current Deal Status' as 'Counting' and 'Delivery Status' as 'Initial Revision'. It also displays 'Actual Revision' as 'Initial Revision', 'SSP Status' as 'Active', and 'DSP Status' as 'Active'. The 'Delivery Indicators' section shows the same date range as the main report.

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.

