



# **BID SWITCH**

**Onboarding to Deals Discovery**

Welcome aboard!



# Getting Started Checklist



Submit your deals. Make sure to add descriptions and all requested details to enable Demand Partner discovery. (Note that **USD** is the only supported currency at launch)



Ensure deals are set up as open deals and the appropriate traffic is being routed to BidSwitch. Keep in mind that deals without any traffic associated will get archived after a period of time



Monitor whether deals have been activated and trading has started in the Deals Discovery Dashboard



Update deals as necessary and Pause or Archive inactive deals

# Get started by uploading deals to the Deals Discovery Dashboard

- 1 Navigate to the Deals Discovery tab in the Deals Center section of the left-hand navigation bar in the BidSwitch UI
- 2 Click on the Bulk Management button to download the New Deals template (XLSX format) and upload your one-to-many, open deals to be discovered

*Note:* The 'Description' tab in the template provides detailed examples of the requested field values

The screenshot displays the BidSwitch Deals Discovery Dashboard. On the left is a navigation menu with 'Deals Discovery' selected. The main area shows a 'Deals Discovery' header with a 'Bulk Management' button. Below the header are filter options for Status (All deals), Creative Type (Auction), Country, and Inventory Type. A 'Bulk Management' modal is open, showing a document icon and the title 'Bulk Creation or Editing'. The modal text reads: 'Create new or update existing deals by uploading changes to your deals list via Excel file.' Below this is a 'Download' dropdown menu with 'New Deals Template' selected, and a 'Download New Deals Template' button. An 'Upload a File' button is also present, with a red circle containing the number '2' next to it. At the bottom of the modal, it says 'If you have any problems please [contact support](#)'.

# Complete your deals upload template with deal info

Navigate to the **Description tab** of the deal upload file to discover field values and examples. Note that the template is case-sensitive. The fields are listed below for reference. Only fields **in the red box** are required, however we suggest submitting all fields to help Demand Partners with discovery.

## Required

- Deal Id\*
- Display name\*
- Creative type\*
- Status
- Start time
- End time
- Auction type\*
- Currency code (*USD for now!*)
- Price\*
- Description
- Publishers
- Contact email
- Display sizes (*for display*)
- Duration (*for video/audio*)
- Duration match (*for video/audio*)
- Skippable (*for video/audio*)

## Optional

- Inventory image  
*(will default to BSW image if left blank)*
- Weekly total avails
- Weekly unique avails
- Excluded DSPs
- Underrepresented group owners

*\*These fields are not editable after initial upload*

# Update/pause or archive deals

- 1 Click on your deal in the Deals Discovery list to navigate to the details page, where you can update the deal information
- 2 Once trading has commenced, Troubleshooting and Reporting sections will be available within the Deals Reporting tab
- 3 Set your deal status as needed

Note: *Archived deals cannot be unarchived*

The screenshot shows the 'Deals Discovery' interface. On the left is a navigation menu with 'Deals Center' expanded to show 'Deals Discovery', 'Deals Management', and 'Deals Reporting'. The main area has filters for Status (All deals), Creative Type, Auction, Country, Inventory Type, and Device Type. Below the filters is a table of deals. One deal, 'Example Deal ABC', is highlighted with a red dashed box and a red circle '1'. The deal's status is 'PAUSED'.

Deal Name	Status	Deal ID	Timeframe	Creative Type	Price	Auction Type
Example Deal ABC	PAUSED	IDeal-123456	Jun 2, 2023 - Jun 1, 2024	Display	\$15.24	Fixed Price

The screenshot shows the 'Test Deal' details page. On the left is a navigation menu with 'Deals Center' expanded to show 'Deals Discovery', 'Deals Management', and 'Deals Reporting'. The main area has a 'Basic info' section with fields for Deal Name (Test Deal), Deal ID (testtest), Creative Type (Display), Status (Active, Paused, Archived), and Time frame (Jan 2, 202 - Jan 2, 2024). The 'Reporting' section is highlighted with a red dashed box and a red circle '2'. The 'Status' section is highlighted with a red dashed box and a red circle '3'. The 'Preview' section shows 'Total activations 0' and a note about deal activation from Demand Partners.

**Basic info**

Deal Name: Test Deal

Deal ID: testtest

Creative Type: Display

Status: Active Paused Archived

Time frame: Jan 2, 202 - Jan 2, 2024

**Reporting**

**Preview**

You can see what the deal page will look like for Demand Partners from the Deal Discovery interface within [Deal Preview](#)

**Activations**

Total activations: 0

To facilitate deal activation from Demand Partners, please start sending the Deal ID on an ongoing basis. This will help buyers identify Deal value based on exposed metadata and forecasting metrics.

# Monitor deals in the Deals Management Dashboard

- 1 Navigate to the Deals Management Dashboard in the Deals Center section of the UI to check deal details and activation status
- 2 Tick the “Only Deals Discovery deals” checkbox to see deals uploaded via the Deals Discovery Dashboard
- 3 Click on the Deal name to navigate to a detailed view and update the deal

The screenshot shows the 'Deals Management' dashboard. On the left is a sidebar with a menu: Demand Partners, Deals Center (expanded), Deals Discovery, Deals Management (selected), Deals Reporting, Reporting, Settings, and Blocking. The main area is titled 'Deals Management' and includes a 'Bulk Management' button, 'Learn More', and 'Reporting' links. Below the title is a 'Filter by status' dropdown set to 'All Deals 2016' and a search bar 'Start typing Name or Deal ID'. A checkbox labeled 'Only Deals Discovery deals' is checked, with a red circle '2' next to it. A table below lists deals with columns: Name, Status, Deal ID, DSP, Timeframe, Private Auction, and Price. A red circle '1' points to the 'Name' column header, and a red circle '3' points to the 'Example Deal DEF' row. The table contains the following data:

Name	Status	Deal ID	DSP	Timeframe	Private Auction	Price
Example Deal ABC	YES BIDS	DEAL-123456	Demand Partner A	Jun 7, 2023–Jan 1, 2033	Private Auction	\$0.25
Example Deal DEF	STARTING	DEAL-234567	Demand Partner A	Jun 13, 2023–Jan 1, 2033	Private Auction	\$0.01
Example Deal GHI	PROPOSED	DEAL-345678	Demand Partner A	Jun 13, 2023–Jan 1, 2033	Private Auction	\$0.60
Example Deal JKL	PROPOSED	DEAL-456789	Demand Partner A	Jun 13, 2023–Jan 1, 2033	Private Auction	\$0.25
Example Deal MNO	PROPOSED	DEAL-567890	Demand Partner A	Jun 13, 2023–Jan 1, 2033	Private Auction	\$0.01
Example Deal PQR	PROPOSED	DEAL-678901	Demand Partner A	Jun 13, 2023–Jan 1, 2033	Private Auction	\$0.01

# Deals Reporting Dashboard displays trading details

- 1 Navigate to the Deals Reporting Dashboard in the Deals Center section of the UI to monitor your trading
- 2 Export details on one or many deals
- 3 Click on an individual Deal ID to dig into deal stats (e.g. invalid requests, no respond reason, etc.) and troubleshoot if trading doesn't go as expected

The screenshot shows the 'Deals Reporting' dashboard. On the left is a navigation menu with 'Deals Reporting' highlighted. The main area displays a table of deal data for 'Demand Partner A' on 'Jun 14, 2023 - Jun 14, 2023'. A table with 10 columns: Deal ID, Seat ID, Demand Partner, Private Deal, Bid Requests, Bid Responses, Imps, Revenue, Bid eCPM, and Win Rate. The first row shows Deal ID 'DEAL-161844', Demand Partner 'Demand Partner A', Private Deal 'Yes', Bid Requests '87,420', Bid Responses '5,580', Imps '0', Revenue '\$0.00', Bid eCPM '\$0.69', and Win Rate '0.00%'. An 'Export Report' button is in the top right. A 'Troubleshooting' modal is open, showing 'Current Deal Status' with 'Delivery Status' as 'Counting', 'Initial Revision' as 'Active', 'SSP Status' as 'Active', and 'DSP Status' as 'Active'. 'Delivery Indicators' are also shown for the same date range.

Deal ID	Seat ID	Demand Partner	Private Deal	Bid Requests	Bid Responses	Imps	Revenue	Bid eCPM	Win Rate
DEAL-161844		Demand Partner A	Yes	87,420	5,580	0	\$0.00	\$0.69	0.00%

# Deals Discovery Additional Tips

- When trading in **media mode with fees included**, ensure that the floor you enter when you create the deal reflects the floor a buyer needs to bid above for a valid bid
- A deal can only be loaded **once** into Deals Discovery or Deals Sync
- When uploading deals, pay attention to the Bulk Upload template, which indicates the fields that can (and can't) be edited after upload
- Need some inspiration? Below are some suggested Deal Types to keep in mind:
  - Tentpole events (back to school, live sports, holiday, etc)
  - Performance (high CTR, VCR, Viewability, etc.)
  - Contextual bundles (autos, lifestyle, etc.)
  - Single, premium publisher deals (direct supply)



# 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



# **BID SWITCH**

**Thank you.**

