

# The Trade Desk Platform Playbook



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QUICK LINKS

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# Basic Platform Guides

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CAMPAIGN ACTIVATION

# Time-saving Tips

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TIME-SAVING TIPS



# Planning



# Audience Sizing

Use cloning, country filter and shared data group functions for quick audience build of multi-market audience sizing

## Tip 1

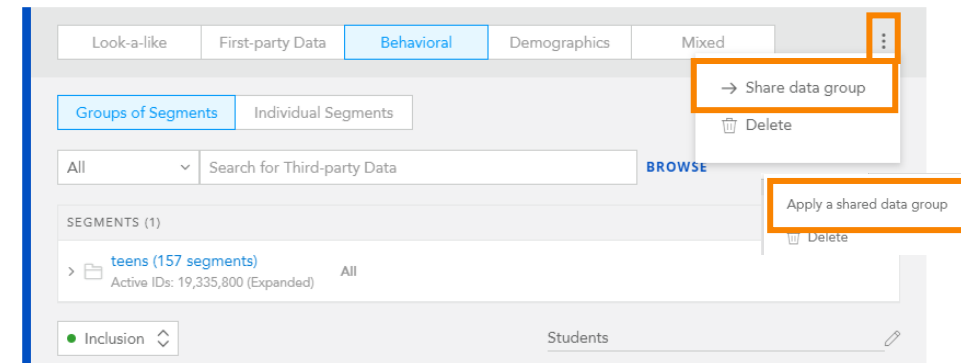
- Used **Shared data group** to assign same data targeting to multiple audience (eg: assign 1PD exclusion to all 3PD audiences)
  - Toggle at  on and select “Share data group” to share a data group
  - In the new audience’s data group, toggle at  and choose “Apply shared data group” then search for the shared data group name

## Tip 2

- Use **audience cloning** function to clone out past audiences and modify data groups to build new audiences

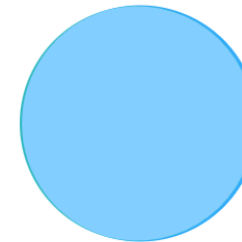
## Tip 3

- For **multi-market audience sizing**, build a universal audience with segments of multiple markets and toggle country filter to check audience size for individual market
- Remember to apply **Country** filter when browsing segments to add in relevant segments with high unique in targeting countries and avoid low scale issue

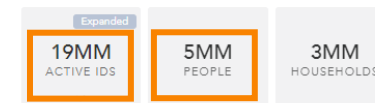


### Audience Preview

Viewing uniques for: Indonesia



- STUDENTS
- BEHAVIORAL 2
- YOUR AUDIENCE



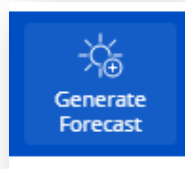
Q Search EDIT COLUMNS Brand Cost Persons Active IDs Category **Country** 

- Total audience universe size per market can be reviewed under People and Unique ID sizes in Audience Preview section. For more detailed forecast, you can use **Forecasting tool**.



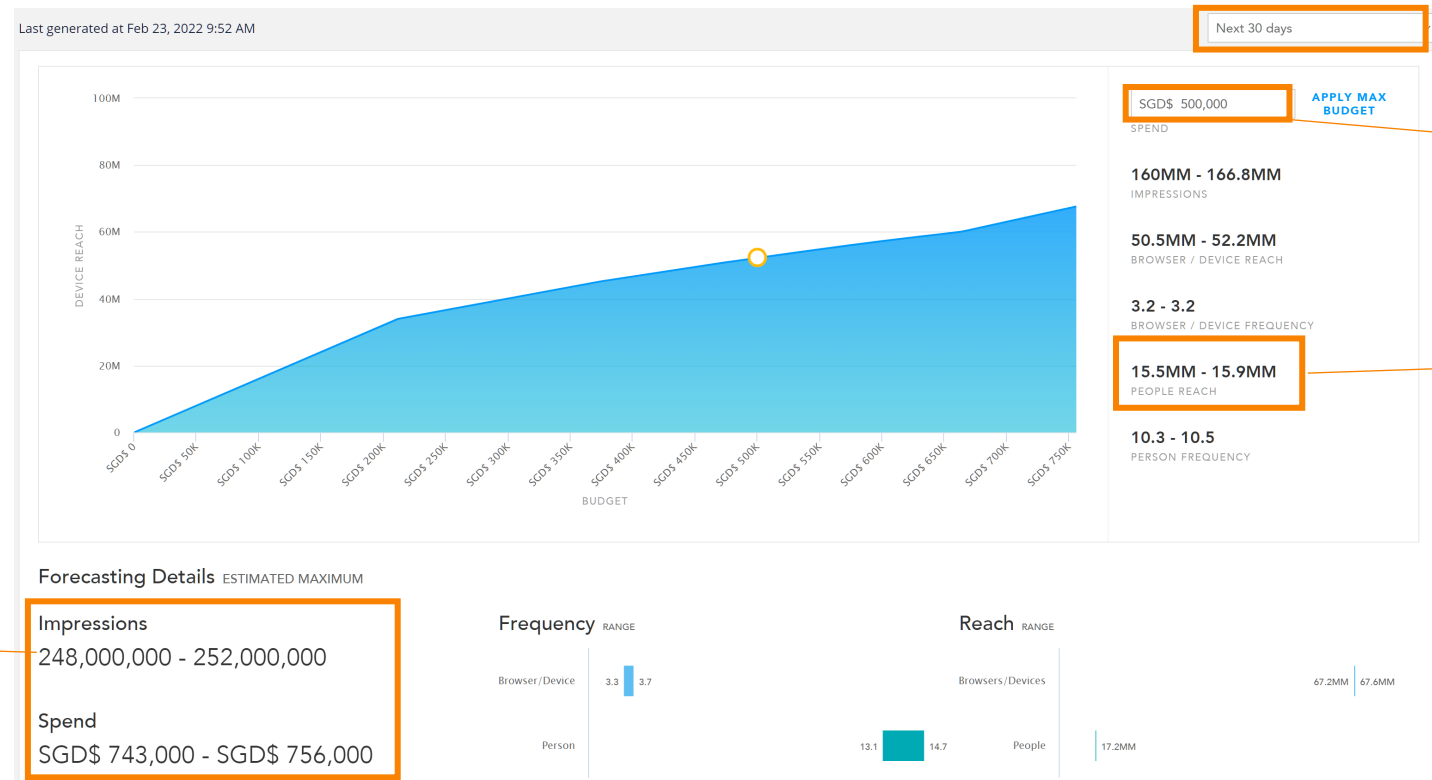
# Forecasting tool

Understand forecasted spend, impressions and reach of target audience for easy media planning



How to use it:

- Access Forecasting tool under **BUY > All Campaigns tab > Generate Forecast** button on the action bar
- Input target 3PD audience, geography, bid price or media type to generate forecast.
  - Reduce bid price or tighten f-cap if desiring lower reach estimate or vice versa
- Change forecasted period to “Next 30 days” to review 1-month forecasted spend / reach



Input campaign budget to review forecasted impressions and reach

Forecasted reach for budget input. Increase budget if desiring higher reach

Maximum forecasted impression and spend

# Solimar Campaign-Level Forecasting

Forecast overall spend, reach, and impressions on the campaign creation wizard

**TRY OUT SOLIMAR**  
ADVERTISER

OBJECTIVE   BUDGET   KPIS   CUSTOMER   DEFAULT RAILS   **FINAL REVIEW**

Time for a final review!  
**Review the set of campaigns we propose for you.**  
We will generate an individual campaign for each channel. You can make changes here or anytime before your campaigns go live.

Master Campaign Name: Awareness\_Try out Solimar\_06102021 (7 campaigns)

**Objective**  
AWARENESS

**KPIs**  
REACH - Primary KPI  
INCREMENTAL REACH - Secondary KPI

**Channels and Budgets** (Recommended)

TOTAL BUDGET - \$100,000.00 (Budget) - 07/01/2021 - 07/31/2021

TV - \$16,666.67 (Budget) - \$16.7K (Pot. Spend)  
Ad Groups (3)

VIDEO - \$16,666.67 (Budget) - \$16.7K (Pot. Spend)  
Ad Groups (6)

DISPLAY - \$16,666.67 (Budget) - \$16.7K (Pot. Spend)  
Ad Groups (6)

NATIVE VIDEO - \$16,666.67 (Budget) - \$16.7K (Pot. Spend)  
Ad Groups (6)

NATIVE DISPLAY - \$16,666.67 (Budget) - \$16.7K (Pot. Spend)

**Forecast Summary:**  
 \$100K POTENTIAL SPEND  
 170.3K - 171K POTENTIAL PEOPLE REACHED  
 59.3K - 59.6K POTENTIAL HOUSEHOLD REACHED  
 13.4MM POTENTIAL IMPRESSIONS

How to use it:

- Initiate campaign creation using Solimar campaign workflow to let Solimar system automatically recommend relevant channels. Forecasting details will appear at last step “Final Review”
- Get a sense of how much your campaign can spend based on your targeting parameters even before running campaigns
- If more ad groups are added manually, the forecast will change dynamically to consider them

Why it is useful for planning?

- Unlike the Forecasting tool where it was on the ad group-level, this **deduplicates reach** across ad groups to provide an overall campaign reach forecast

TIME-SAVING TIPS

# Activation & Optimizations



# Campaign QA Tips

## Tip 1

- **Export to QA:** save time QA-ing campaigns with multiple ad groups by selecting all ad groups and choose “**Manage Ad Groups**” -> “**Export to QA**” to QA all ad groups setting in an excel sheet. Each row is 1 ad group.

The screenshot shows the 'CAMPAIGN' tab in the interface. The 'Manage Ad Groups' dropdown menu is open, and the 'Export to QA' option is highlighted with an orange box. The menu also includes options like 'Bulk Edit Ad Groups', 'Edit Names', 'Clone Ad Groups', 'EXPORT SPREADSHEETS', 'Export Campaign', 'Export Selected Ad Groups', 'Export to QA (Switch Rows and Columns)', and 'Turn On'.

	A	O	P	Q
1	<b>Setting</b>	<b>ROIGoalType</b>	<b>ROIGoalValue</b>	<b>Audience</b>
2	<b>Cheetos Fans</b>	CPA	20	1yza0mr - Cheetos and Cheez-It Fans
3	<b>Koa Interest + Demo</b>	CTR	0.0015	rw6zndl - AutoTune - Interest Targeting - AdGroup yh9kqle
4	<b>LAL Modeling</b>	CPA	6	Audience Predictor
5	<b>TTD Custom Audience</b>	CPA	6	42859jl - AutoTune - High Value Users - AdGroup aqedoea

Below the table, there are tabs for 'Settings Summary', 'Bid Dimensions', and 'Flight Settings'.

## Tip 2

- **Budget check:** ensure that total ad group budget exceeds or at least equal to campaign budget assigned to avoid underpacing

The screenshot shows a table with columns for 'Flight Start and End (UTC)' and 'Budget'. The 'Campaign budget' is highlighted with an orange box and labeled as 'Campaign budget'. The 'Total ad group budget' is also highlighted with an orange box and labeled as 'Total ad group budget'.

Flight Start and End (UTC)	Budget
05/20/2021 12:00 AM - 06/30/2022 11:59 PM	\$ 500,000
Cheetos Fans	\$ 300,000   60%
Koa Interest + Demo	\$ 5,000   1%
LAL Modeling	\$ 200,000   40%
TTD Custom Audience	\$ 400,000   80%
<b>TOTALS</b>	<b>\$905,000.00   181%</b>

# Campaign QA Checklist

## Common items to check before taking campaigns live

CAMPAIGN LEVEL	<p><b>Budget &amp; Flight date:</b> are set correctly based on final media plan. Recommended to have fluid budget (i.e total ad group budget &gt; campaign budget) to let the system prioritize spend on best performing ad groups</p>
	<p><b>Margin:</b> Correct agency margin for respective advertiser is applied (or removed if not applicable)</p>
	<p><b>Pixel:</b> Ensure that:</p> <ol style="list-style-type: none"> <li>1. Landing Page and other required pixels are assigned in campaign’s Reporting &amp; Attribution section. Identity Alliance cross-device attribution is selected for all pixels assigned to campaign for cross-device tracking</li> <li>2. Pixels are implemented on correct page (check using Chrome’s <b>Ghostery extension</b>)</li> <li>3. Pixels are recording hit counts in First Party Data Library. If not, re-check on implementation.</li> <li>4. IBI pixels are assigned to Reporting &amp; Attribution section as well (if run IBI)</li> </ol>
	<p><b>Frequency cap:</b> recommend not having too restrictive f-cap. General guidance for f-cap:</p> <ul style="list-style-type: none"> <li>– <b>Prospecting:</b> 3-5/week</li> <li>– <b>Retargeting:</b> 3/day to 3/3hrs, depending on audience size</li> </ul>
	<p><b>KPIs/Goal</b> are updated for both campaign and ad group level. Recommend to assign CTR / CPC/ VCR/ CPCV rather than just Reach for better media efficiency.</p>
	<p><b>Bid price</b> is adjusted accordingly per market and channel CPM benchmarks. Max bid has to be higher than PMP floor price Usually max bid is 2-3x higher than base bid for Open Exchange</p>
	<p><b>Pacing:</b> recommend to set <b>Pace Ahead</b> to have early data for optimizations and avoid underpacing</p>
	<p><b>Viewability Reporting:</b> Ensure that post-bid viewability reporting is enabled if need to optimize for viewability goal on TTD. Disable this for PG campaign if not applicable.</p>

AD GROUP LEVEL	<p><b>Brandsafety / IVT:</b> Brandsafety, Invalid Traffic, Grapeshot Category blocklist and Brand/Agency site blocklists are applied if applicable</p>
	<p><b>Prebid-Viewability:</b> Recommend NOT to apply for PMP campaigns to avoid scale issue.</p>
	<p><b>Audience:</b> Ensure that:</p> <ol style="list-style-type: none"> <li>1. Correct 3PD / LAL / RTG audiences are assigned.</li> <li>2. Audience has good Active ID size for the market targeting</li> <li>3. Identity Alliance cross-device feature is enabled for retargeting and PMP campaigns with 3PD audience targeting</li> </ol>
	<p><b>Private Contract:</b> Ensure that:</p> <ol style="list-style-type: none"> <li>1. PMP deals assigned have avails. If has 0 avails, inform publishers to check if deal is activated.</li> <li>2. Option “Help me reach contract floor price” is ticked. Recommend to put at least 5% higher than floor price to have smooth pacing</li> </ol>
	<p><b>Creative:</b> Ensure that:</p> <ol style="list-style-type: none"> <li>1. Creative preview well and clickthrough to correct landing page (sampling check)</li> <li>2. Creative are marked Secured and no creative is rejected by SSPs</li> <li>3. (If applicable) 3<sup>rd</sup> party impression trackers are applied correctly</li> </ol>
	<p><b>Grapeshot Contextual:</b> separate GS Predicts segments in a different ad groups from GS standard segments. Segments start with “gc” needs to add using “<b>Add Custom Category</b>” option.</p>
	<p><b>Koa feature:</b> Ensure that Koa Optimizations is enabled (already enabled by default)</p>

# Pacing Tips

## Tip 1

- Under Home section, use **Pacing Status** filters and sort by “Ending soonest” to review underpacing campaigns and underspend at risk amount for campaigns ending soon

The screenshot shows a campaign management interface. At the top, there is a search bar and a filter dropdown set to "Ending soonest". Below this is a table with columns: ADVERTISER, CAMPAIGN, PACING \$, UNDERSPEND, IMPRESSIONS, EXCESS POTENTIAL, PRIMARY KPI PERF, and ENDING. The table lists three campaigns from "Tangs singapore". The first campaign has a pacing of "SGD\$ 744.69 at risk", the second "SGD\$ 601.45 at risk", and the third "SGD\$ 977.17 at risk". A dropdown menu is open over the table, showing options: "Not spending" (checked), "Pacing behind" (checked), "Pacing within 10%" (checked), "Pacing to spend" (unchecked), and "Not started yet" (unchecked).

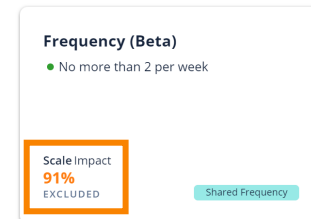
ADVERTISER	CAMPAIGN	PACING \$	UNDERSPEND	IMPRESSIONS	EXCESS POTENTIAL	PRIMARY KPI PERF	ENDING
Tangs singapore	CP-SGHUB-4957_AN~Tangs_CN~TANGS CNY C...	SGD\$ 744.69 at risk	⚠️ SGD\$ 69	94.3K	+SGD\$ 14.1K	SC	10 days
Tangs singapore	CP-SGHUB-4957_AN~Tangs_CN~TANGS CNY C...	SGD\$ 601.45 at risk	⚠️ SGD\$ 59	70.1K	+SGD\$ 2	SC	10 days
Tangs singapore	CP-SGHUB-4957_AN~Tangs_CN~TANGS CNY C...	SGD\$ 977.17 at risk	⚠️ SGD\$ 83	200	+SGD\$ 0	SC	10 days

## Tip 2

- Use **base bid** / loosen **frequency cap** for quick pacing improvement if campaigns is underpacing with CPM and lifetime frequency lower than planned KPIs

## Tip 3

- Use **% Scale Impact** of ad group rail to assess which rail is most restricting scale.
- Add in more audience segments / contextual segments to expand scale



## Tip 4

- For PMP campaigns, check **avails/bids/wins** and use **Troubleshooting** Tool in **Private Contract** rail to see reasons avails are excluded. Common reasons are:
  - Low avails** → ask publishers to send more avails
  - Low bid rate** → see Troubleshooting Tool, common blockers are pre-bid viewability/brand safety rails, bids below floor price, restrictive f-cap, audience
  - Low win rate** (<25% for PMP, <40% for PG) → ask publishers to check if anything hindering bid winning on their side, could be creative
- Use **potential spend** to access which ad group / campaigns to shift budget to for pacing improvement

# Optimizations Tips

## Tip 1

- Under Home section, use **KPI status** filter to review campaigns that are not achieving performance KPI to apply optimizations

ADVERTISER	CAMPAIGN	PACING \$	UNDERSPEND	IMPRESSIONS	EXCESS POTENTIAL	PERFORMANCE	ENDING
STB_SG_ZO_SGD	CP--SGHUB-4724_AN--STB_CN--STB-IM21-710-S...	Projected to spend in full	SGD\$ 0	22K	+SGD\$ 172K	GD\$ 1,244.7... AT RISK	6 days
STB_SG_ZO_SGD	CP--SGHUB-4724_AN--STB_CN--STB-IM21-710-S...	Projected to spend in full	SGD\$ 0	20.6K	+SGD\$ 172.2K	GD\$ 1,207.7... AT RISK	6 days
STB_SG_ZO_SGD	CP--SGHUB-4724_AN--STB_CN--STB-IM21-710-S...	Projected to spend in full	SGD\$ 0	19.4K	+SGD\$ 42.5K	GD\$ 2,465.1... AT RISK	6 days

## Tip 2

- For campaigns with **CPL / CPA goal**, ensure that we are running on trackable environments and inventory with cookie/device IDs associated to track conversion
  - Apply 0 bid factors in Operating System and browser optimization rail to block non-trackable environments such as **IOS 14.5+** and **Safari**
  - Ask Supply team/publishers to ensure that PMP deals has persistent IDs associated and no avails that contains no ID. Review PMP **Contract Details** page to check if the deal has avails containing no ID.

### UserId Types Present

• Contained No Id 37,642 0.02 %

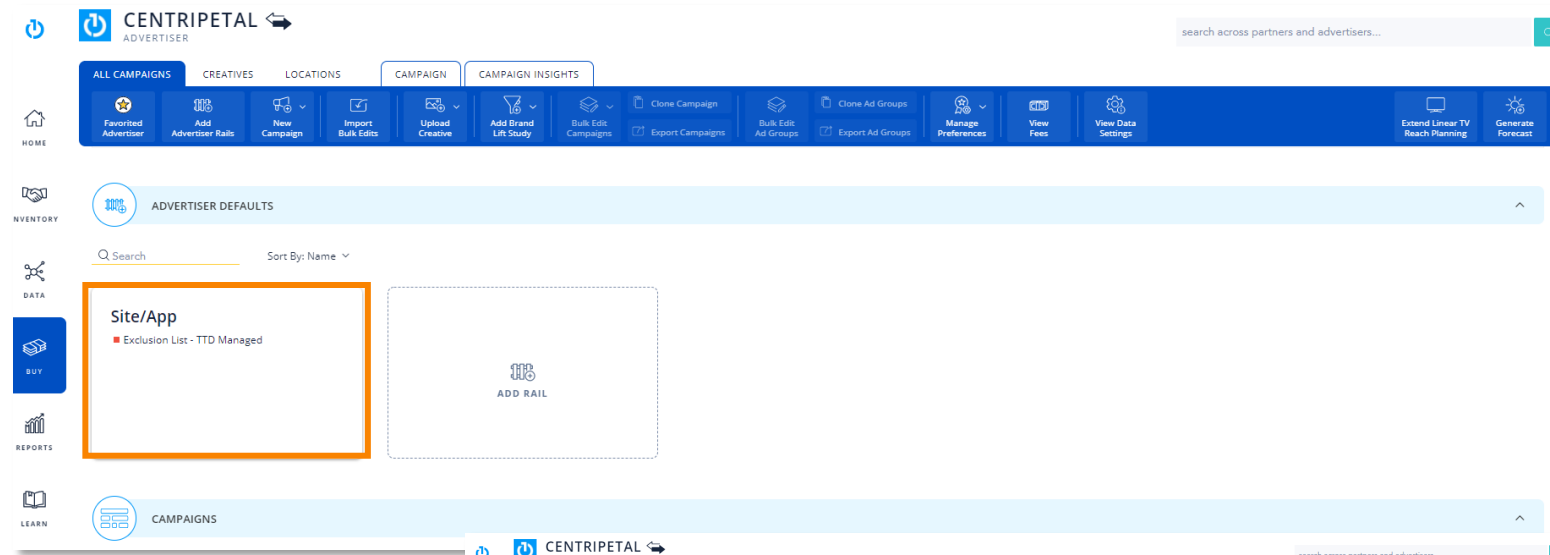
## Tip 3

- Use **Initial Insights Combined Pivot** report to review what works and what doesn't to apply optimization bid factors.
  - Start with **site trimming** using data in "Inventory" tab. Apply 0 bid factors for sites does not perform despite serving a substantial amount of inventory.
    - For sites with high impressions, apply 0.3-0.5 bid factors for more conservation optimizations and avoid scale issue
  - For campaigns with **CTR / CPC goal**, use data in "Ad Group" and "Technology" tab and apply optimizations for **Ad Format, Device Type, Ad Environment** as these grains have significant impact on click-base performance
- For **PMP** campaign, apply site trimming if the deal includes extensive sitelist. Otherwise, inform PMP partners to apply optimizations on their end and send inventory with higher historical performance KPI

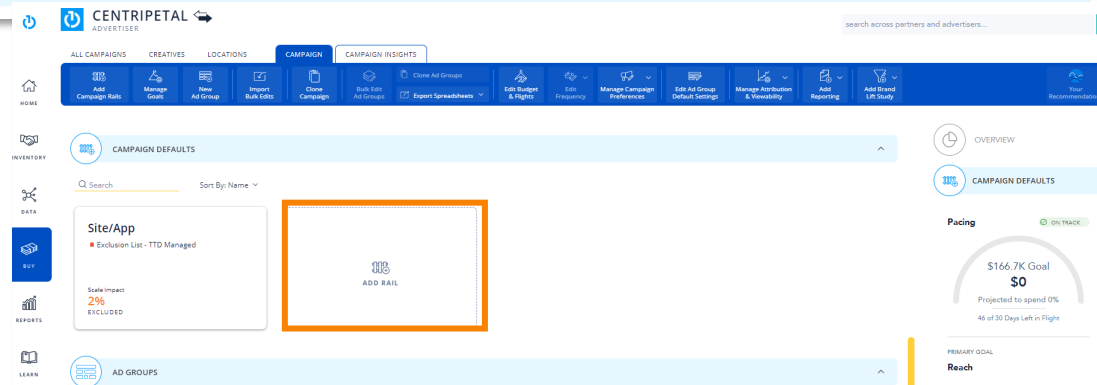
# Default Rail

Save time by applying commonly used targeting as default rails at advertiser and campaign level

## 1 Advertiser Defaults – BUY > ALL CAMPAIGNS (Advertiser)



## 2 Campaign Defaults – BUY > ALL CAMPAIGNS > CAMPAIGNS



**Defaults rails:** Available at the advertiser and campaign level

How it works:

- Newly added default rails/changes to default rails only apply to any subsequently created campaigns/ad groups
- To make changes to existing activity, use bulk edit tools

**Examples of how to use it:**

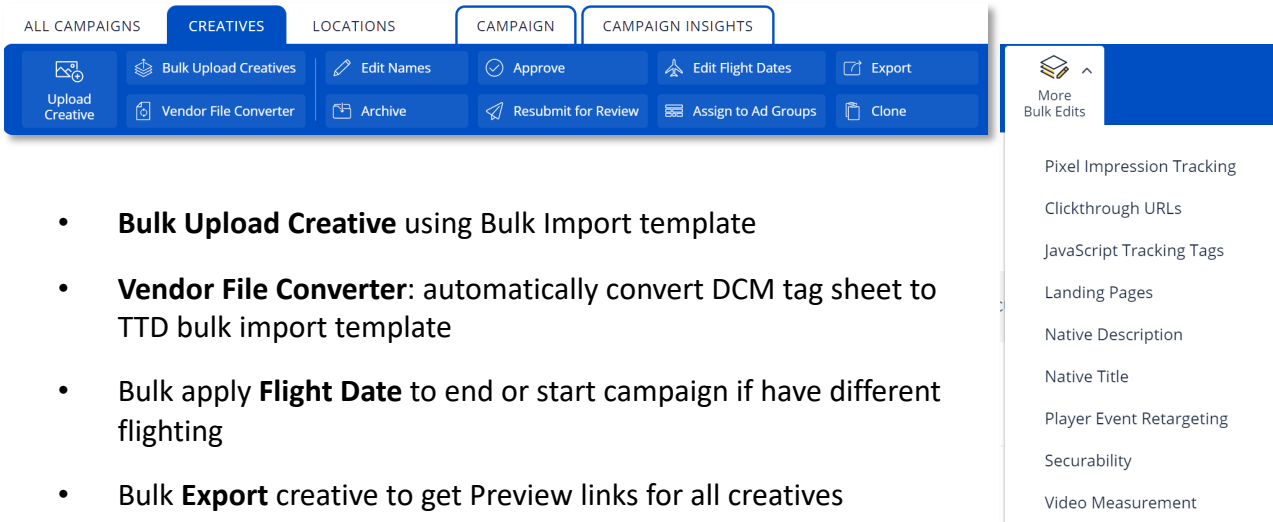
- *Advertiser level:* Blocklists, Brand safety, Viewability
- *Campaign level:* Geography



# Bulk Edit Menu

Look for Bulk Edit options to apply changes in bulk for various setup processes to save time

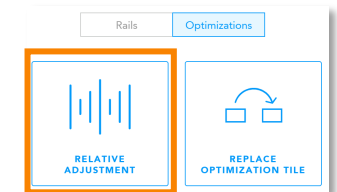
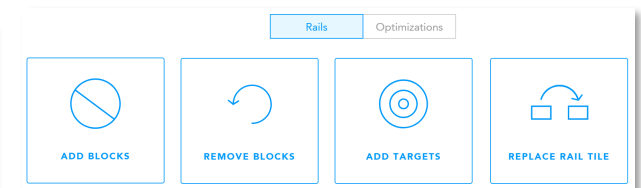
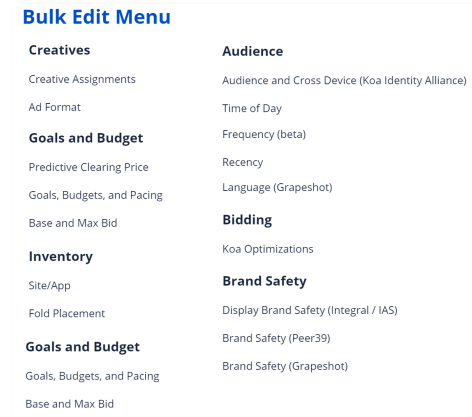
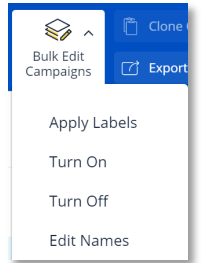
## Creative



- **Bulk Upload Creative** using Bulk Import template
- **Vendor File Converter:** automatically convert DCM tag sheet to TTD bulk import template
- Bulk apply **Flight Date** to end or start campaign if have different flighting
- Bulk **Export** creative to get Preview links for all creatives
- Apply actions in bulk for several other actions:
  - User Approve, Resubmit for SSP Review
  - Clone, Assign to Ad Groups
  - Mark creatives as Secured
  - Apply Impression URL / Javascript Tracker
  - Change clickthrough URL / landing pages

## Campaign

- **Bulk Edit Campaigns:** turn on/off campaigns or edit campaign name in bulk.
- **Bulk Edit Ad group:** apply targeting rail and optimizations in bulk for multiple ad groups
  - Select ad groups and search for relevant rail in Bulk Edit Menu to apply change in bulk
  - Select **“Rail”** if add or remove targeting / blocks
  - Select **“Optimizations > Relative adjustment”** to apply bid factors optimizations



# Cross-campaign Bulk Edit

Apply cross-campaign bulk edits to save activation time for multi-market and multi-channel media plans

## How to use

- Under BUY > All Campaigns, scroll down to **Ad Group** section and search for relevant ad group names to select ad groups across multiple campaigns.
- Option to use **Channel / Status / Campaign** filters to filter out relevant ad groups when necessary
- Select all relevant ad groups and use **Bulk Edit Ad Groups** button to apply the change to multiple ad groups across campaigns
- Sample use case:** apply brand safety blocklist or SSP targeting rail to all Open Exchange ad groups across all campaigns

The screenshot shows the Trade Desk interface for an advertiser named 'O&R FOODS'. The 'BUY' section is active, and the 'Ad Groups' view is selected. The 'Bulk Edit Ad Groups' button is highlighted in the top navigation bar. Below it, the 'Ad Groups' section is visible with a search bar containing 'solimar' and filter buttons for 'Channel Type (All)', 'Status (2)', and 'Campaigns (All)'. A table of ad groups is displayed below the filters.

	NAME	BUDGET	PACING	BIDDING	GOAL	PERFORMANCE	SPEND (CURRENT FLIGHT)
<input checked="" type="checkbox"/>	Solimar Demo - Ad Group 1 (Site LAL)	Budget	Yesterday	\$0.00 Bids	0 CPA Actual	\$0.00 CPM	\$0.00 Projection
<input checked="" type="checkbox"/>	Solimar Demo - Ad Group 2 (Video)	Budget	Yesterday	\$0.00 Bids	0 CPA Actual	\$0.00 CPM	\$0.00 Projection
<input checked="" type="checkbox"/>	Solimar Demo - Ad Group 3 (PG)	Budget	Yesterday	\$0.00 Bids	0 Incremental Reach Goal	CPM	\$0.00 Projection

# PMP deal activation

Utilize Easy Proposal Activation to automatically accept and setup PMP deals

Available for PG deals from below SSPs:  
**Google AdX, BidSwitch, Freewheel, Magnite CTV, Place Exchange, PubMatic, Xandr Monetize, and YieldMo**

- Find PG deal proposal to accept under **Inventory > Proposal** section
- Select **“Generate”** after accepting PMP deal to let the system automatically set up PMP deal for you.
- If selecting **“Manually generate”**, you’ll need to manually creating PMP deal by inputting deal ID, delivery profile, SSP details
- For **Google AdX** deals, remember to share **“Google Client Account”** seat ID with publisher to use Easy Proposal Activation feature and directly accept deal on UI’s Proposal tab under Inventory section

### Seat Identifiers

Default Partner Seat	1459
Google Seat	Vivaki SEA w/TTD, 107311355
Google Client Account	Precision SEA SGD - cx8effn, 687342676

The screenshot shows the Trade Desk interface with the 'PROPOSALS' tab selected. It displays two proposal cards for 'Precision SEA SGD'. The first card is for 'PubMatic-N-ASEA-PD-PM-SAMSUNG-TTD-IQIYI-SG-VID-...' and the second is for 'PubMatic-PM-FIKP-9482'. Both cards show 'N/A ESTIMATED MEDIA BUDGET' and a 'NEEDS REVIEW' status. Below the cards, the 'Add Delivery Profile' section is visible, showing a 'Permission Profile' dropdown with '1 Delivery Profile selected' and a 'Publicis SEA - SGD Partners' tag. The 'Add Response' section includes a 'PROPOSAL RECEIVED' notification from October 07, 2021. At the bottom right, there are buttons for 'REJECT', 'RENEGOTIATE', and 'ACCEPT', with the 'ACCEPT' button highlighted.

# PG campaign activation

Save time and let the system automatically set up PG campaign via Easy Proposal Activation

Available for PG deals from below SSPs:

**Google AdX, BidSwitch, Freewheel, Magnite CTV, Place Exchange, PubMatic, Xandr Monetize, and YieldMo**

- Find PG deal proposal to accept under **Inventory > Proposal** section
- Select **“Generate”** after accepting PG deal to let the system automatically set up PG campaign for you. Do not choose **“Manually generate”** if you do not want to manually create campaign
- Select **“Create new campaign”** and fill in necessary campaign information in pop up window to generate PG campaign
- Choose **“Add in existing campaign”** if you want to add the PG deal to existing PG campaign

The screenshot displays a pop-up window titled "Generate Campaign for KP Test Proposal" with a close button (X) in the top right corner. The window is set for the dates "MARCH 5, 2021 - MARCH 12, 2021".

**Campaign Details**

Buttons: "Create new campaign" (highlighted in blue), "Add to existing campaign"

Progress indicator: ✓ CAMPAIGN DETAILS

Campaign Name\*: "KP Test Proposal"

This campaign is managed by The Trade Desk

**Attribution Reporting**

Buttons: "ADD PIXEL MAPPING" (highlighted in blue), "Other campaign settings" (with a chevron icon)

**Applied Ad Groups / Contracts**

Text: "Each programmatic guaranteed contract will run as an ad group in this campaign"

Progress indicator: ... SET UP AD GROUP 1

Section: "AD GROUP 1" (with a chevron icon)

**Name Ad Group**

Name: "First deal" (in a text input field)

Cross Device: (with a help icon) "Cross Device Options" (with a chevron icon)

**Set Frequency Cap**

Maximum Cap: (with a help icon)

**Assign Creatives**

Text: "The creative requirements for this ad group are Video (MP4/200) DETAILS" (with a link icon)

Buttons at the bottom: "CANCEL", "SAVE AND ENABLE AD GROUPS" (highlighted in blue)

Footer: "OSAL RECEIVED"

TIME-SAVING TIPS

# Post-Campaign Insights



# MyReport Insights

Where to find what insights?



Basic Performance  
Stats



Initial Insights  
Combined Pivot



Tracking Tag Report

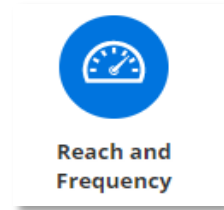
- **Basic Performance Report:** general campaign / ad group/ creative performance summary. Can look back > 100 days
- **Initial Insights Combined Pivot Report:** useful for more granular campaign insights of post-campaign insight decks:
  - **Inventory insight:** see top performing sites / categories / SSPs in “*Inventory tab*”
  - **Creative insight:** see which creative version and ad format performed the best in “*Ad Group tab*”
  - **Audience insight:**
    - See which 3PD audience affinity segments performed the best in “*Data Element tab*”
    - See which creative version that audience is most responsive to in “*Ad Group tab*”
    - See what time of day / day of week that audience is most likely engaged with ad in “*Time of Day tab*”
    - See if Android or IOS users are more likely to engage with ad in “*Technology tab*” (Operating System Family field)
- **Tracking Tag Report:** check conversion trend via pixel firing and check where the pixel is firing from (Normalized Referral URL field). Remove this Referral URL field to reduce report size when pulling report for pixels with extensive hit counts or long lookback period > 30 days

# Reach & Frequency Campaign Insights

## Real-time campaign Reach & Frequency insights

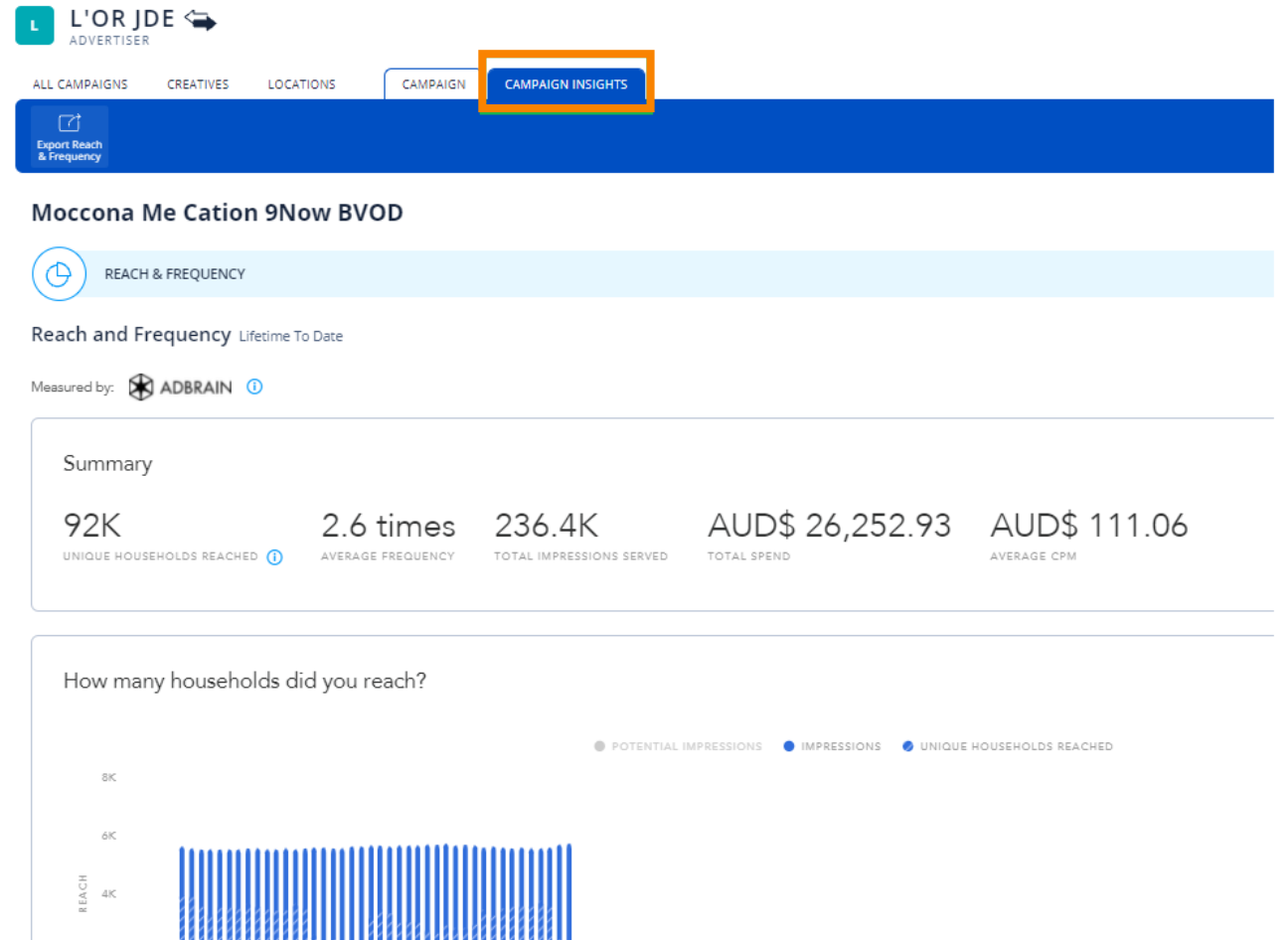
At the campaign level, navigate to **Campaign Insights** tab to get information on the Unique ID, Person & Household reach.

For more detailed breakdown of reach & frequency at ad group level or advertiser level, you can find in 'Reach & Frequency' reporting template in My Reports.



### Tips:

- For aggregated and **de-duplicated reach** across campaigns/market/channel, select relevant campaigns when pulling Reach & Frequency report and review aggregated reach under “**Advertiser Reach**” tab
- For **incremental reach** of a channel / campaign, pull 2 Reach & Frequency reports. The difference between 2 Advertiser Reach numbers is the incremental reach. Example:
  - Report 1 is reach of Display + OTT campaigns (eg: reach = 10M)
  - Report 2 is reach of Display campaign only (eg: reach = 6M)
  - Incremental reach driven by OTT channel is  $10M - 6M = 4M$



# Audience Insight Dashboard

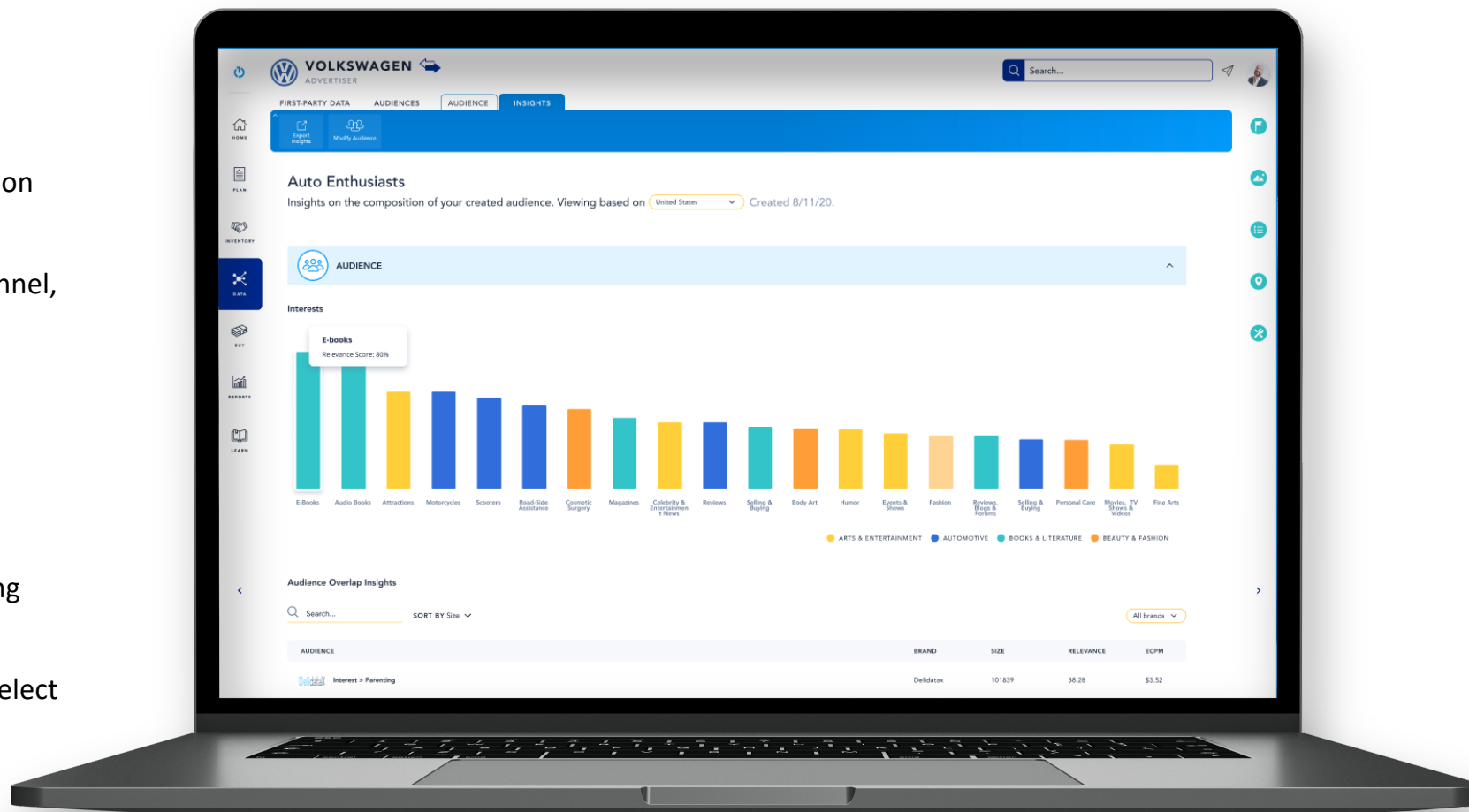
Gain a better understanding of your audience and the best strategy to reach them

## Key Benefits

- **Discover** your audience's interests & media consumption habits
- **Inform** strategic planning thru insights on market, channel, device and media mix
- **Optimize** audiences to align with broader marketing strategies

## How to use

- Available for all audiences built in Data library, including both 1PD and 3PD audience
- "Insights" tab appears upon clicking at audience and select Country to review insights
- Insights includes top interests, top overlap audience segments, top channels, devices, environments, market mix relevant to the audience





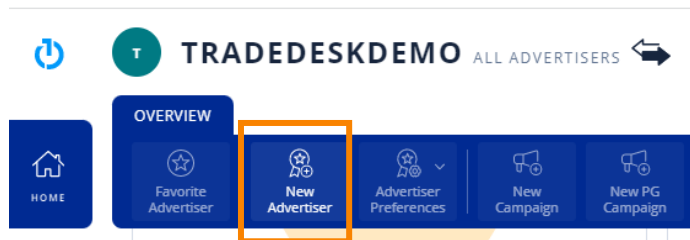
HANDY HINTS

# Frequently Asked Questions

# Handy Hints: Platform Navigation

How do I create a New Advertiser?

You can do so at the **Partner Level** > **New Advertiser**

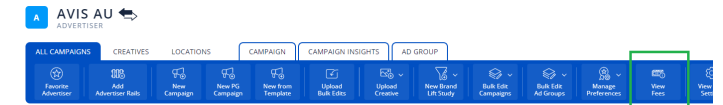


How do I find our Partner, Advertiser & Seat IDs?

Advertiser Level: **Buy Tab** > **Manage Preferences** > **Seat Identifiers & Keys**

Where do I find all feature fees?

Advertiser Level: **Buy Tab** > **All Campaigns** > **View Fees**



## Fees

When used in campaigns and ad groups, the following features incur a fee.

### ADVERTISER FEES

#### Post-Bid Visibility Reporting

Moat	\$0.02 CPM display and video fee
Moat Advanced Metrics	\$0.04 CPM display and video fee
Integral Ad Science	\$0.05 CPM display fee / \$0.12 CPM video fee
DoubleVerify	\$0.09 CPM display fee / \$0.15 CPM video fee
No Post-Bid Visibility Reporting	fee

### CAMPAIGN FEES

#### Post Bid Reporting

Nielsen Digital Ad Ratings (DAR)	\$0.20 CPM non-CTV / \$1.00 CPM CTV fee
ComScore	\$0.09 CPM third-party fee

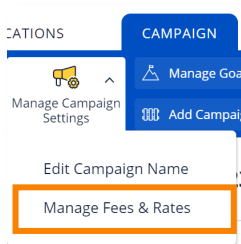
# Handy Hints: Platform Navigation

**Where do I update campaign agency margin?**

You can do so at Campaign Level:

**Buy Tab > Campaign > Manage Campaign Settings > Manage Fees & Rates**

Choose “View” to review rate and “Turn Off” to remove the margin set



## Manage Campaign Fees & Rates

Fees are deducted from your campaign's budget, and are additional to those at the ad group level or within partner rate cards.

FEE CARD VERSION	# OF FEES/RATES	STATUS
08/23/2021 12:36 PM SGT - Indefinitely	1 Fee	Active

+ FEE CARD

**How to I enable/disable post-bid visibility measurement**

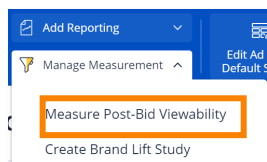
Post-bid Viewability reporting feature needs to be enabled for campaign with viewability goal for the system to optimize. Without enabling this, you won't be able to review viewability performance on UI and in reporting.

However, if you already track viewability with 3<sup>rd</sup> party vendor and does not need optimizations (especially for PG campaign), you can disable this feature, by toggling at campaign level:

- **Buy tab > Campaign > Manage Measurement > Measure Post-bid Viewability**

Please enable this at advertiser level to choose a preferred vendor when setting up a new advertiser:

- **Buy tab > All Campaigns > Advertiser Preferences > Post-bid Viewability Reporting**



## Select Post-Bid Viewability Reporting

- Post-Bid Viewability Provider**
- MOAT Moat
  - MOAT Moat Advanced Metrics
  - IAS Integral Ad Science
  - DV DoubleVerify **Partner Default Setting**

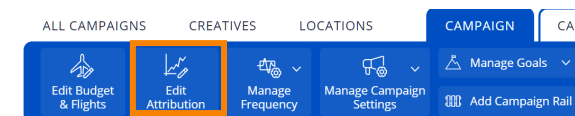
**Where do I assign pixels to my campaign?**

At campaign Level:

**Buy Tab > Campaigns > Edit Attributions**

Assign the pixel required for CPA goal calculation as the 1<sup>st</sup> pixel (priority 1).

Enable **Identity Alliance Cross Device** to allow cross-device conversion tracking



## Manage Reporting & Attribution

- Conversion Pixels**
- Use the top-priority pixel to calculate CPA
  - Calculate custom CPA

**Conversion Data Mappings**

PRIORITY	CONVERSION DATA SOURCE
1	09092020_Nike_Test - Default (q7m9y0d)

# Handy Hints: Creative

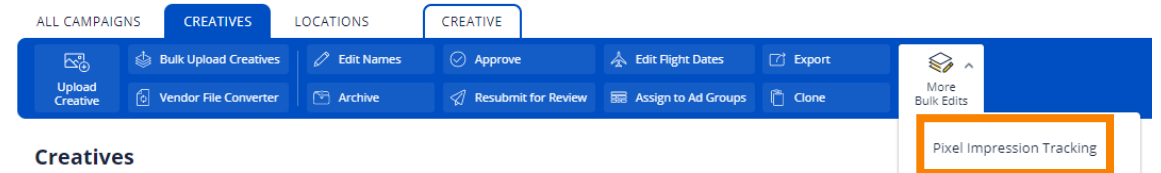
Where do I find Creative Specs?

- [Display](#)
- [CTV](#)
- [Native](#)
- [Audio](#)
- [DOOH](#)
- [Video by Channel](#)
- [General Mobile](#)
- [HTML5 Creative Specs](#)
- [MRAID](#)
- [Hosted Video](#)
- [Third Party Video](#)

Where do I apply IAS / DV 3<sup>rd</sup> party tracking pixel on creatives?

## Manual creative upload:

- Apply impression tracker under “Tracking (3<sup>rd</sup> Party Tracking URLs)” for Video or “1x1 Pixel Impression Tracking URL” for Display.
- Bulk apply: select all creatives > More Bulk Edits > Pixel Impression Tracking



## Bulk creative import:

- Apply impression tracker in bulk creative import excel sheet:
  - **Display:** input in column “Third Party Tracking URL” in bulk import sheet
  - **Video:** input in column “Video Event URL: Impressions” in bulk import sheet. Use a space to separate if applying multiple impression trackers

# Handy Hints: PMP

A publisher has sent through a PMP & I can't find it in the inventory library. Why?

If the deal SSP is among below SSPs, you can find and accept proposal under Inventory tab > Proposal

- *Google AdX, BidSwitch, Freewheel, Magnite CTV, Place Exchange, PubMatic, Xandr Monetize, and YieldMo*

If you can't find your PMP, please ask the publisher to clarify the **SSP & seat ID** they used and re-push the deal again.

If Google SSP is used, please share the seat ID under '[Google Client Account](#)' so that you can accept the proposal in TTD's UI. There is no need to 'accept deals' for other SSPs.

If you're still unable to find the deal, then please reach out to TTD email alias for help!

## Seat Identifiers

Default Partner Seat	9
Google Seat	The Trade Desk RTB, 48446606
Google Client Account	tradedeskdemo - tradedeskdemo, 458087241
Yahoo	480789

Can we overlay audiences for PMP / Audio / CTV campaigns?

Yes, where we receive user IDs within the bid request, we will be able to utilise audience targeting, as well as cross-device conversion & holistic frequency capping.

However, to be mindful of scale, we recommend to apply demographic audience targeting on the publisher side and apply other 3PD audience targeting only to RON PMP deals.

Other **best practices** to ensure good scale with audience overlay are:

- Inform publishers to send inventory with ID passed back (cookie / device IDs) for PMP deals to have good match rate with audience
- Activate Identity Alliance cross-device targeting in audience rail
- Avoid having niche audience targeting

# Handy Hints: Data & Audience

## What types of 1st party data can be used in TTD?

First-party data is powerful; it is data directly known by you about your customers.

- [Universal Pixels](#)
- [Image Pixels](#)
- [App Data](#)
- [IP Addresses](#)
- [Device IDs](#)
- [My Imported Data](#)

## What are some 3PD Audience Targeting best practices?

- Use **Exclusion** segments for Demo targeting where possible to minimise costs
- Apply **Country filter** in “Data Preference” section before building audience to ensure relevant segments for targeting geo will be included.
- Use **Cost filter** to select suitable data cost range based on media plan CPM
- Select all relevant segments instead of limiting to just a few segments to have good scale
- **Broaden search keywords** to include more segments when estimate audience scale is small (eg: less than 500K persons for a big geo)
- Limit the number of ‘AND’ statements (i.e number of data groups). TTD would encourage no more than 2 data groups.

## What does an Active Count in TTD mean?

Active ID’s represent a 7-day lookback that displays users who were active on the open internet in the past week. This excludes expired cookie IDs so you can have a more realistic audience size/reach when you’re forecasting & targeting audiences.

Actual targetable audience size can be higher as active ID count is only based on 7-day lookback of bid request data.

# Handy Hints: Data & Audience

**What is the difference between an 'AND' and 'OR' statement?**

If you create a data group with 10 segments, you're effectively saying that you want to buy an ID that is seen in segment 1 OR segment 2.

When you create an AND statement, the impression you buy needs to match both ID's in the data groups.

**If I include 5 segments in my Audience, does TTD charge for all 5?**

Absolutely not! This is a common misconception.

TTD will only charge for one segment in a data group, so there is no added cost in including more segments in the same audience data group.

**How do data charges work for AND statements?**

Example: targeting Chinese Speaking Females in Australia:

Oracle Chinese Segment Cost: \$1.00  
AND  
Female Segment Cost: \$0.80  
Total Cost: \$1.80

If you were to instead include an exclusion, your cost would be:

Oracle Chinese Segment Cost: \$1.00  
AND  
Exclude Males: \$0.13  
Total Cost: \$1.13 (37% saving)

# Handy Hints: Data & Audience

Why can't I find a 3PD segment that a data partner has sent through?

For custom data segments outside of the DMP/data provider's standard taxonomy, please ensure:

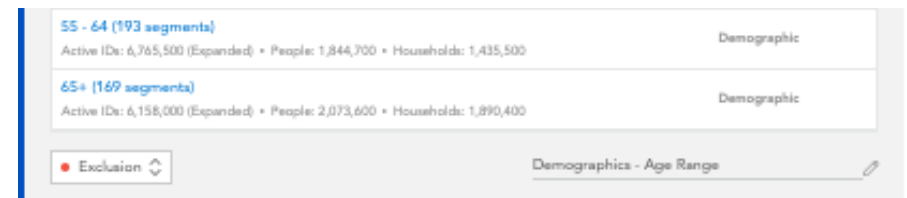
- They have used the correct **Partner ID**
- You have allowed for **2 business days** for the segment to be exposed
- Confirm all parties are aligned on the type of segment (1st vs 3rd party) and that the segment has been pushed to the correct data point
- Confirm all parties are aligned on the data segment names & ID's

If you're still unable to find, please request the DMP / data provider to repush the segment and loop in TTD team for assistance.

Why does The Trade Desk always recommend to use Exclusion segments for Demo in the Audience Library where possible?

In TTD, it's 3.5% of media with \$0.15 CPM cap to use any exclusion segment. This way, you're able to achieve some great cost benefits plus minimizing impact to scale by including this in your targeting strategy.

In this example, you may want to target People 18-24 interested in Sports. Instead of targeting Sporting Segments AND targeting people 18-24, instead you could target Sporting Segments and Exclude people >24.





# Handy Hints: Reporting

Does the Trade Desk have any tips on Reporting? I.e. What are the best templates to use?

The three most commonly used templates are:

Basic Performance Stats: a fast/nimble report that has most info you'd need

Initial Insights Combined Pivot: perfect for your PCA's

Reach & Frequency: understand the unique person/household reach across all your channels

TTD would also recommend scheduling reports for your regular campaigns. This way, you're able to automate your workflows to deliver reports to your email daily, or a specific day of the week.

What are the different cost definitions in TTD's reporting?

Media Cost: net spend to the publisher

Data Cost: the cost of any 3PD data segments in the DMP, offline measurement costs, ad group pre-bid data targeting, Audience Excluder, or Audience Predictor features.

Fee Feature Cost: the cost of specific ad-serving (highlighted on the MSA) and predictive clearing

Partner Cost: total cost in TTD (Media + Data + Fee Features + Tech Fee). Note, the budget you input in the campaign is inclusive of all costs and will match invoicing.

TTD Margin: this is TTD's tech fee which is X% of Partner Cost

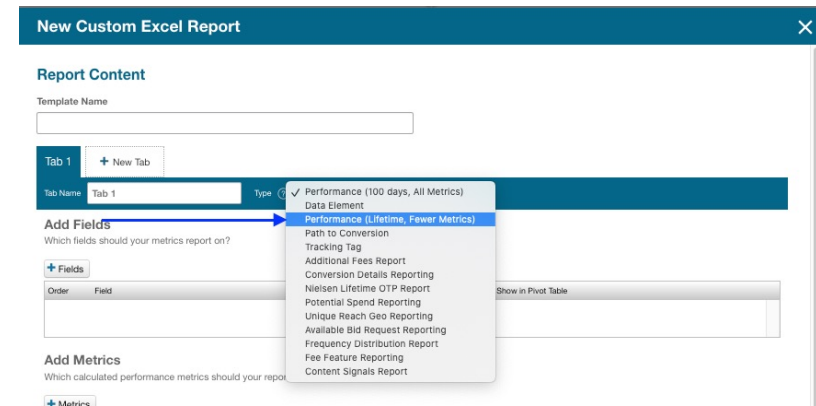
**Profit:** agency margin, corresponding to campaign's fee card input

Advertiser Cost = Partner Cost + Agency margin

My report can only go back 100 days, how can I get a longer reporting window?

To get a report with longer lookback period, simply change the report 'type' to 'Performance (Lifetime, Fewer Metrics)'.

Please use **Basic Performance Stats** report template for YoY or yearly performance review.



# Thank You

