

Targeting Groups User Guide



Introducing BidSwitch Targeting Groups

Over the next several weeks, BidSwitch will be replacing the current Bidstream Settings navigational tab and workflow with a new feature called **Targeting Groups**, which will provide the same bidstream filtering functionality with some notable enhancements. This rollout will happen in phases, and all trading partners will receive notices and training materials in advance of any changeover taking place in the UI.

Why the change?

Historically, Demand Partners have been able to filter the bidstream they receive from BidSwitch at the individual Supply Partner level. Managing these settings separately across all connected partners can be inefficient and inflexible. In the new setup, buyers will be able to group multiple Supply Partners into one Targeting Group and create bidstream filters for the entire group in one place, at one time.

They will also be able to apply non-intersecting filters to one Supply Partner by creating multiple Targeting Groups, enabling much more granular bidstream filtering rules. As an example, in the current setup, a buyer would apply the minimum filters required to a single Supply Partner to satisfy their buying needs (ex: for Supply Partner A, send only Android & iOS inventory from US & UK). In the new setup, a buyer can create as many Targeting Groups as desired for one Supply Partner to ensure only the traffic they need comes through (ex: for Supply Partner A, send only Android

inventory from US in Targeting Group 1; send only iOS inventory from UK in Targeting Group 2). In this second example, the buyer is able to stop listening to UK/Android and US/iOS inventory from this Supply Partner, saving QPS for more desirable inventory.

Moving to Targeting Groups also opens up additional bidstream controls for Demand Partners that will be available in future releases, most notably the ability to turn SmartSwitch off and set QPS limits per data center at the individual Targeting Group level. These enhancements will be available to Demand Partners who have moved to a commercial model based on traffic distribution (Distribution Fees) rather than media. Switching to a Distribution Fees model requires new paperwork, but can be supported at any time. Please talk to your Account Manager or email support@bidswitch.com for more information.

What additional benefits should I expect to see by using Targeting Groups?

With the update to Targeting Groups, BidSwitch Demand Partners will now be able to:

- ▶ Apply bidstream filtering rules or changes to groups of Supply Partners all at once, vs one-by-one as is the case today.
- ▶ Refine the traffic received from each Supply Partner to a very granular degree by creating non-intersecting filters across multiple Targeting Groups, as mentioned above.

Combined, these enhancements deliver greater bidstream control, flexibility, and granularity to Demand Partners.

As part of a second phase that will be rolled out at the end of Q2 2020, Demand Partners who have accepted a Distribution Fees model will also enjoy the following benefits:

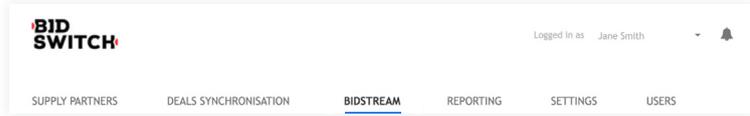
- ▶ Being able to apply QPS settings for each data center at the Targeting Group level, vs only the Data Center level across ALL Supply Partners, as is currently the case.
- ▶ Being able to turn SmartSwitch on or off for specific Supply Partners or inventory profiles, managed through Targeting Groups.

Does this change require any technical work on my side?

No, the release of Targeting Groups will not require you to do any technical work. You will start to see a new parameter, `tg_id`, passed in the bid request. As part of the second phase of this release (scheduled for late Q2 2020), we may start to report on `tg_id` in the UI.

Where to find Targeting Groups in the UI:

The current myBidSwitch navigational structure looks like the image to the right:



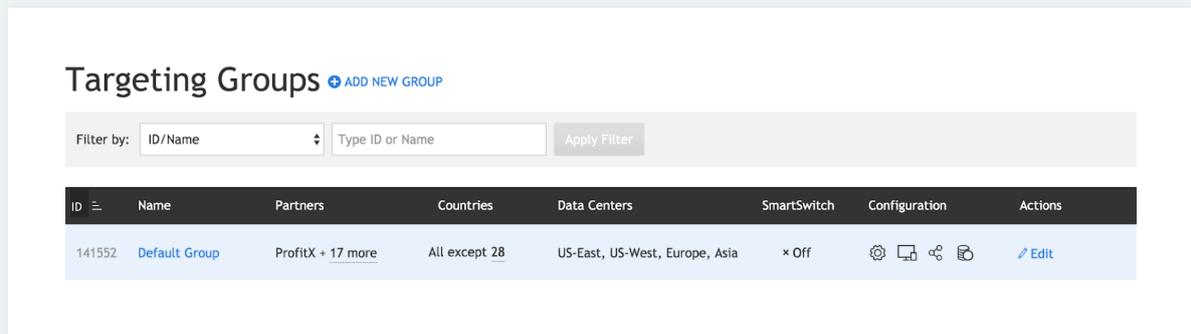
Once Targeting Groups are released, the navigational structure will look like the image to the right, where **BIDSTREAM** is replaced with **TARGETING GROUPS**:



Important Note:

ALL current bidstream settings that you have configured in the myBidSwitch UI at the Supply Partner level will be automatically migrated to Targeting Groups as follows:

- ▶ All Supply Partners that have your current Default bidstream settings applied will be migrated to a new Targeting Group, called Default Group, where the same default settings will be pre-configured.
- ▶ Any Supply Partner that has unique bidstream settings will be migrated to its own Targeting Group in the new workflow, where the same bidstream filters will be pre-configured.
- ▶ If a Supply Partner shares bidstream settings with another Supply Partner, they will be migrated into their own Targeting Group in the new workflow, with the same bidstream filters pre-configured.



Managing Migrated Targeting Groups:

When you visit the new Targeting Groups section in the myBidSwitch UI, following the migration of your current Bidstream Settings to new Targeting Groups, you will see them listed in the manner below. As noted above, all Supply Partners who currently use your Default Settings will be migrated into the Default Group, which sits at the top of the list. All other Targeting Groups represent groups of Supply Partners or individual Supply Partners with unique settings configured. In this list, you can:

- 1 Review Targeting Group settings by clicking the **Targeting Group** name.
- 2 Scroll over underlined text in **Countries, Partners, or Data Centers** column to see a hover bubble exposing all settings.
- 3 Scroll over icons in the **Configuration** column to specific bidstream settings, which will appear in a hover bubble.
- 4 Pause, Start, or Delete a Targeting Group

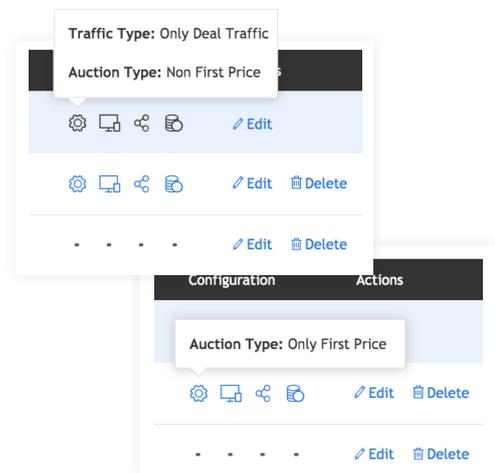
The screenshot shows the 'Targeting Groups' interface. At the top, there is a filter section with a dropdown menu labeled 'ID/Name' (callout 1) and a search box labeled 'Type ID or Name' (callout 2). Below this is a table with columns: ID, Name, Partners, Countries, Data Centers, SmartSwitch, Configuration, and Actions. The 'Configuration' column (callout 3) contains icons for settings. The 'Actions' column (callout 4) contains buttons for 'Pause', 'Start', and 'Delete'. The table lists three groups: 'Default Group' (ID 141552), 'Ligatus, TripleLift' (ID 141553), and 'Beachfront' (ID 141554).

ID	Name	Partners	Countries	Data Centers	SmartSwitch	Configuration	Actions
141552	Default Group	All except Adap.tv and 5 more	27	US-East, US-West, Europe	On	[Icons]	Pause
141553	Ligatus, TripleLift	Ligatus, TripleLift	1	US-East	On	[Icons]	Start Delete
141554	Beachfront	Beachfront	26	US-East, US-West	On	[Icons]	Pause Delete

If the Targeting Group has the same settings as the Default Group for a particular category (ex: Traffic Type, Ad Size, Device Type), a grey dot will appear in the column under Configuration.

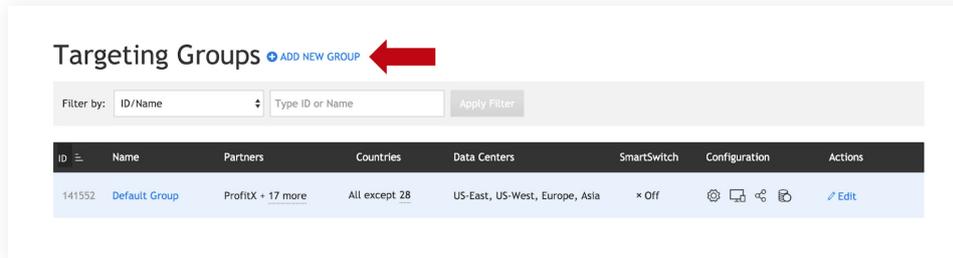
If a Targeting Group has different settings from the Default Group for a particular category, an icon will appear depicting the differing category.

When you hover over the icon, text will appear highlighting the differences in settings between the Targeting Group and the Default Group.



Setting up new Targeting Groups:

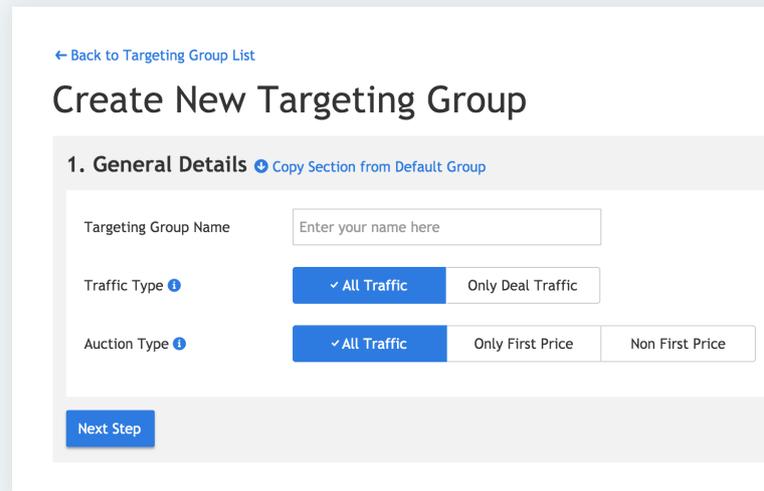
From the Targeting Groups main page, click the ADD NEW GROUP link, located next to the page header. This will then initiate a 4-step process that guides you through Targeting Groups setup.



STEP 1: General Details

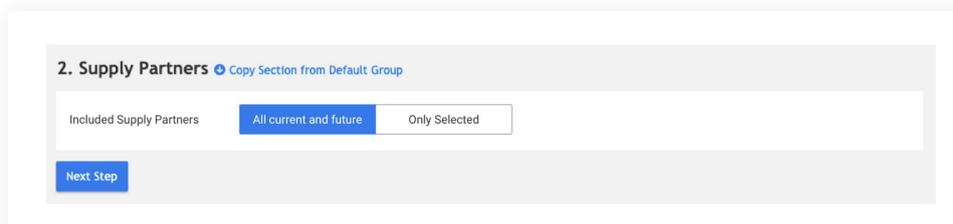
Initiate new Targeting Group creation by assigning a name to the new group and indicating if you want the filtering rules to apply to all traffic (open + deals), or just deals.

You can also filter traffic based on auction type, opting to receive all traffic (regardless of auction type), only first price, or only non-first price (which includes 2nd-price, fixed price, and any other type). Note: This filter does not apply to private deals.

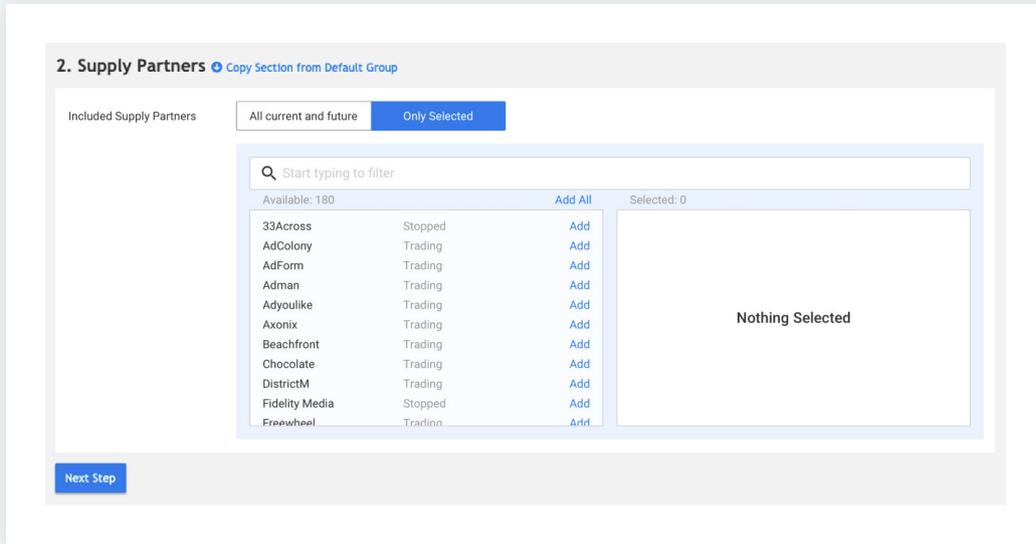


STEP 2: Supply Partners

Next, you will need to determine the Supply Partners you want included in the Targeting Group. By default, the workflow includes all Supply Partners you are currently connected to via BidSwitch. By keeping this option selected (labeled **All Current and Future** in the UI), any new Supply Partners you connect to in the future via BidSwitch will automatically be added to this Targeting Group.



If you would prefer to choose specific Supply Partners for a given Targeting Group, select the **Only Selected** box to expand the selection window panes, as below.

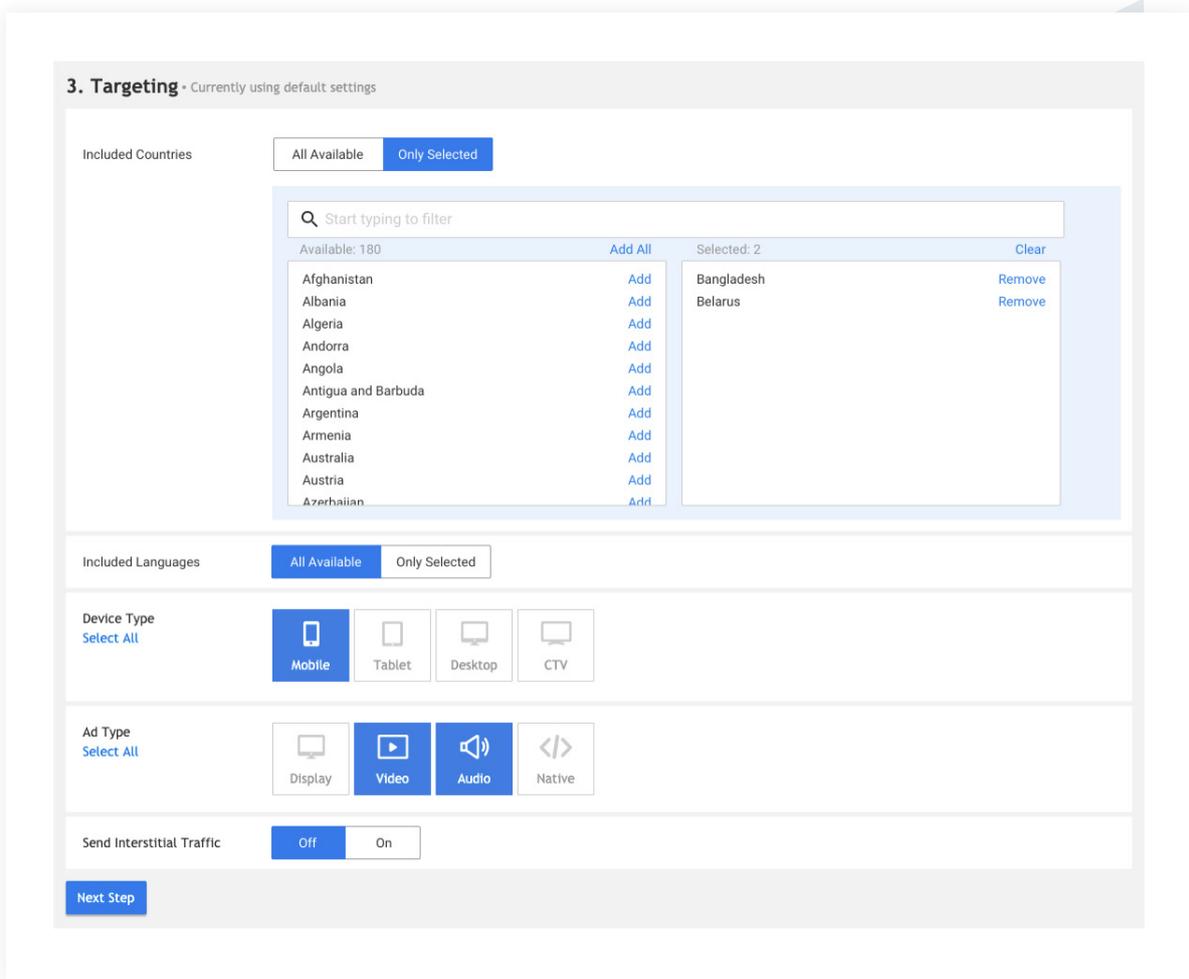


From here, you can add Supply Partners to a Targeting Group by clicking the **Add** link next to their name. This will cause the added Supply Partner to move to the frame on the right. You can also add all Supply Partners to a Targeting Group by clicking the **Add All** link at the top of the list of available Supply Partners.

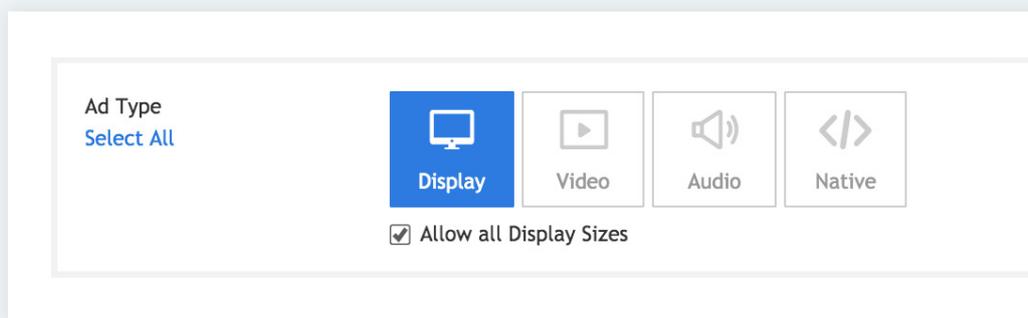
NOTE: This is a departure from the way Bidstream Settings are currently managed in BidSwitch today, which is at the individual Supply Partner level. With the introduction of Targeting Groups, you are now able to apply bidstream filtering rules to a group of Supply Partners at the same time (rather than one partner at a time), which will reduce the amount of time spent managing and updating settings as new buying requirements, product enhancements, and inventory formats emerge. There is no limit to the number of rules that can be applied per partner.

STEP 3: **Targeting**

Next, you can apply additional filtering rules by restricting the countries and languages for which you receive bid requests, using the same logic as in Step 2. You can also filter traffic by Device Type (mobile, desktop, tablet, CTV) and Ad Type (display, video, native, audio), and indicate whether or not you want to receive interstitial inventory.



Under Ad Type filtering, clicking on the Display icon will enable an **Allow all Display Sizes** checkbox to appear. Keep this box checked to always receive all Display Sizes.



Alternatively, you can uncheck the box to specify the exact Display Sizes you want to receive. BidSwitch advises against this practice, however, as there are a large number of ad sizes still used in trading, but at levels infrequent enough so as to not be included in this list. Specifying only a list of exact sizes may impact certain trading negatively. SmartSwitch by default will limit the traffic it sends for ad sizes not being actively bought by your DSP.

Ad Type
Select All

Display Video Audio Native

Display Sizes ⓘ

- | | | | |
|---|---|--|--|
| <input type="checkbox"/> 120x60 | <input type="checkbox"/> 300x50 | <input type="checkbox"/> 320x480 | <input type="checkbox"/> 750x100 |
| <input type="checkbox"/> 120x600 | <input type="checkbox"/> 300x60 | <input type="checkbox"/> 336x280 | <input type="checkbox"/> 750x200 |
| <input type="checkbox"/> 125x125 | <input type="checkbox"/> 300x90 | <input type="checkbox"/> 468x60 | <input type="checkbox"/> 768x1024 |
| <input type="checkbox"/> 160x600 | <input type="checkbox"/> 300x100 | <input type="checkbox"/> 468x90 | <input type="checkbox"/> 800x250 |
| <input type="checkbox"/> 168x28 | <input checked="" type="checkbox"/> 300x250 | <input type="checkbox"/> 480x80 | <input type="checkbox"/> 930x600 |
| <input type="checkbox"/> 180x150 | <input type="checkbox"/> 300x300 | <input type="checkbox"/> 480x320 | <input type="checkbox"/> 970x90 |
| <input checked="" type="checkbox"/> 200x200 | <input checked="" type="checkbox"/> 300x600 | <input type="checkbox"/> 640x360 | <input type="checkbox"/> 970x250 |
| <input type="checkbox"/> 234x60 | <input type="checkbox"/> 320x50 | <input type="checkbox"/> 640x480 | <input type="checkbox"/> 980x120 |
| <input type="checkbox"/> 240x400 | <input type="checkbox"/> 320x80 | <input type="checkbox"/> 700x100 | <input type="checkbox"/> 980x240 |
| <input type="checkbox"/> 250x250 | <input type="checkbox"/> 320x100 | <input checked="" type="checkbox"/> 728x90 | <input checked="" type="checkbox"/> 1024x768 |
| <input type="checkbox"/> 250x360 | | | |

Allow all Display Sizes

STEP 4: Platform Settings

In this section, you can choose to receive or not receive inventory from traditional media channels, including DOOH and Programmatic TV.

NOTE: Accessing supply from these channels may require additional integration work to support specific protocol or creative approval requirements. Before enabling, please consult your account manager or support@bidswitch.com.

4. Platform Settings [Copy Section from Default Group](#)

Digital Out of Home ⓘ	<input type="checkbox"/> Off	<input type="checkbox"/> On
Programmatic TV ⓘ	<input type="checkbox"/> Off	<input type="checkbox"/> On
In-App Settings	<input type="checkbox"/> Off	<input type="checkbox"/> On
Website Settings	<input type="checkbox"/> Off	<input type="checkbox"/> On

In this section, you are also able to apply more refined settings to both **In-app and Website traffic** to:

- ▶ Include traffic from specific app bundles or domains (white list)
- ▶ Exclude traffic from specific app bundles or domains (black list)
- ▶ Filter traffic to only include synced users
- ▶ Filter traffic to only include DECLARED app bundles and/or domains
- ▶ Filter traffic to only include in-app bid requests with location data

4. Platform Settings [Copy Section from Default Group](#)

Digital Out of Home On

Programmatic TV On

In-App Settings On

Send Only Bid Requests with Location Data Device ID

Application Bundles **Black List (16 items)** [Change to White List](#)
Your targeting group will EXCLUDE bid requests from the list below.

- com.adar.cameracantik
- com.android.thewongandonly.quickdraw
- com.aorus.projectjdm
- com.eekgames.worddrop
- com.itbenefit.android.minesweeper
- com.jdm4ikgames.muscledriftsim
- com.jqrapps.fastandslowmotionvideotool

[Upload new list](#) [Delete list](#) [Download](#)

Declared App Source Only send requests with a declared app bundle or app domain

Website Settings On

Synced User Traffic All users Only users synced by buyer

Website Domains **White List (23 items)** [Change to Black List](#)
Your targeting group will INCLUDE bid requests from the list below.

- adpro.futurenet.club
- android.mln.mln-b9e6d9221dcefc50ba23c6bd04ace911
- collage.editor.pro
- com.checkpoints.v1
- com.cootek.smartinputv5
- com.estoty_game2048
- com.feelingtouch.zf3d

[Upload new list](#) [Delete list](#) [Download](#)

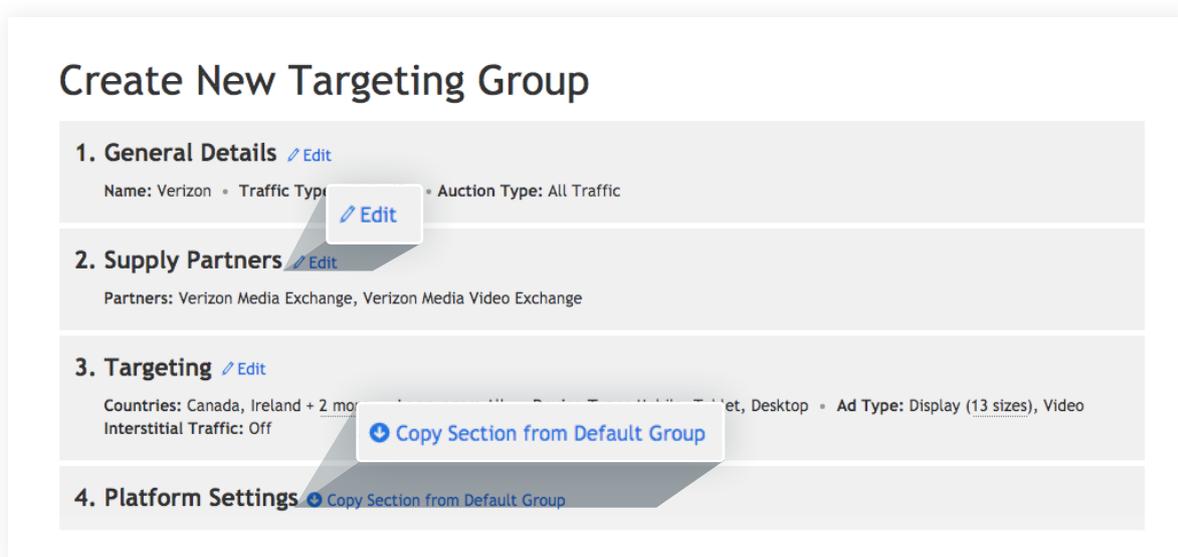
Declared Website Domain Only send requests with a declared web domain

[Next Step](#)

A Few Shortcuts

During the process of creating a new Targeting Group, you can return to prior steps to edit or change your settings by clicking the Edit button next to the section headers (circled below). To save time, you can also copy and paste settings from your Default Group by clicking the Copy Section from Default Group, also circled below. headers.

NOTE: If the Default Targeting Group settings are changed at some point in the future, the new Default Group settings will not be extended to Targeting Groups that were originally created using the Copy Section from Default Group shortcut.



Coming Soon

A second phase of this release, currently scheduled for late Q2 2020, will provide additional controls at the Targeting Group level, which include:

1. Turning SmartSwitch on or off
2. Setting QPS allocations by data center
3. Targeting against Deal ID whitelists/blacklists

With the exception of #3, which will be available to all Demand Partners, the above features will only be available to Demand Partners who have adopted BidSwitch's Distribution Fees trading terms. Separate training and training materials will also be provided to all Demand Partners in advance of the new features being released.



Frequently Asked Questions

01 What are Targeting Groups?

Targeting Groups will replace the current Bidstream filtering tools available in the myBidSwitch UI for clients. Starting in March 2020, this change will be released to Demand Partners on a rolling basis, with all partners migrated to the new tool by the end of Q2 2020. Using Targeting Groups, you will be able to aggregate multiple Supply Partners into a single Group and apply or update bidstream filtering rules to that Group at one time, versus individually. It also allows you to create multiple Targeting Groups with unique bidstream settings for a single Supply Partner, allowing deeper granularity in bidstream management. These filtering rules allow you to better control the traffic you receive from BidSwitch to ensure you can satisfy trading requirements while maintaining cost and listening oversight.

02 What happens to my current bidstream settings?

With the transition to Targeting Groups, ALL current bidstream settings that you have configured in the myBidSwitch UI at the Supply Partner level will be automatically migrated to Targeting Groups as follows:

- ▶ All Supply Partners that have your current default bidstream settings applied will be migrated to a new Targeting Group, called Default Group, where the same default settings will be pre-configured.
- ▶ Any Supply Partner that has unique bidstream settings will be migrated to its own Targeting Group in the new workflow, where the same bidstream filters will be pre-configured.
- ▶ If a Supply Partner shares bidstream settings with another Supply Partner, they will be migrated into their own Targeting Group in the new workflow, with the same bidstream filters pre-configured.

03 Do I have to use Targeting Groups?

Following the release, Targeting Groups will be the only way to set and manage bidstream filters. All current bidstream filtering rules will be automatically migrated to Targeting Groups as indicated in the previous question. This will ensure there's



no impact to your trading activity or the traffic you currently listen to once the migration to Targeting Groups is complete.

04 **What are the benefits of Targeting Groups for Demand Partners?**

Currently in the BidSwitch UI, Demand Partners are able to setup and manage bidstream settings at the individual Supply Partner level (either manually or by applying Default Settings). With the shift to Targeting Groups, you will now be able to setup and manage bidstream filters across groups of supply partners at one time. You will also be able to refine the traffic received from each Supply Partner to a very granular degree by creating non-intersecting filters across multiple Targeting Groups for a single Supply Partner, as illustrated below.

- ▶ Supply Partner A, Targeting Group 1; send only iOS inventory from UK
- ▶ Supply Partner A, Targeting Group 2; send only Android inventory from US

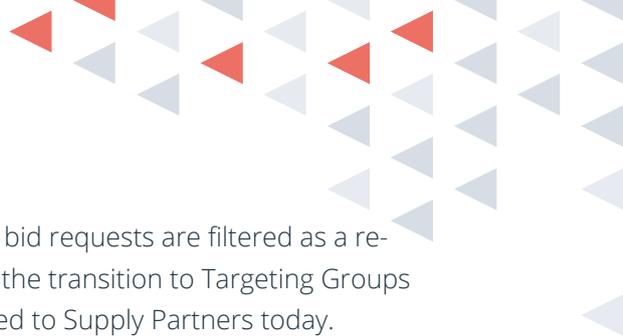
We hope these two enhancements empower Demand Partners with greater control, flexibility, and granularity in the ongoing management of supply sourced through BidSwitch. As part of a later phase of this upgrade (due in June 2020), clients on BidSwitch's Distribution Fees-based commercial model will be able to activate or deactivate SmartSwitch at the Targeting Group level. You will also be able to apply QPS settings for each Targeting Group at the data center level. These additional enhancements give Demand Partners ultimate flexibility and control over the volume and profile of supply sourced through BidSwitch.

05 **Do Targeting Groups replace SmartSwitch?**

No. Just as is the case with bidstream filters today, SmartSwitch will still apply to Targeting Groups to further optimize the bidstream based on your buying patterns and prioritize the inventory you receive based on likelihood to buy. As part of the second phase of this release (targeted for June 2020), Demand Partners who are on a Distribution Fees commercial model with BidSwitch will be able to turn SmartSwitch off at the Targeting Group level from within the myBidSwitch UI. This would then allow a buyer to receive all qualifying inventory from a Targeting Group up to his or her QPS limits, without additional SmartSwitch filtering applied.

06 **Will Supply Partners have visibility into my Targeting Group settings?**

Currently, Supply Partners have access to bidstream filtering reports that help them understand where and why bid requests are getting filtered at multiple stages in the



supply path. As part of this report, they see when bid requests are filtered as a result of DSP targeting rules. This will continue with the transition to Targeting Groups in the same way reporting transparency is provided to Supply Partners today.

07 Can I apply Targeting Groups at the SSP level?

Yes. To do this, you would need to create a separate Targeting Group for each Supply Partner.

08 Is there a limit to how many Targeting Groups I can create?

You will be able to set up to 100 Targeting Groups.

09 Can I have the same partner in multiple Targeting Groups?

Yes, you can have the same partner in multiple targeting groups. For example, as a buyer, if you want to receive Display traffic from all Supply Partners, but only Video from a smaller list of Supply Partners, you could do so by creating two Targeting Groups. Some set of Supply Partners would appear in both Targeting Groups.

10 Will applying Targeting Groups affect my pricing with BidSwitch?

No, Targeting Groups will not affect your pricing with BidSwitch.

11 Do Targeting Groups require me to sign new papers with BidSwitch?

No, migrating to Targeting Groups does not require partners to sign new papers with BidSwitch. Moving to the Distribution Fees commercial model WILL require new papers with BidSwitch.

12 Is FFA/supply-side pricing supported when Targeting Groups are applied?

Yes, Targeting Groups will not affect fee structures - either Supply or Demand unless a Demand Partner chooses to move to Distribution Fees-based model.

13 **How will Targeting Groups affect reporting?**

In Phase 1, reporting will not be affected. Starting in Phase 2 (late Q2 2020), BidSwitch will mark traffic with a Targeting Group ID (tg_id) to indicate which Targeting Groups were applied to a request.

14 **How quickly do my Targeting Group settings go into effect?**

Changes typically go into effect within 20 minutes, which is the same amount of time currently required to process Bidstream changes in the UI today.

15 **Can I control my Targeting Group settings in the BidSwitch UI?**

Yes, you will need to use the BidSwitch UI to setup and manage all Targeting Groups.

16 **Are white/black lists still supported with Targeting Groups?**

Yes, white/black lists are still supported with Targeting Groups for web domains and app bundles.

17 **Can I set QPS limits at the Targeting Group level?**

As part of Phase 2 of this release, Demand Partners who are on a Distribution Fees commercial model with BidSwitch will be able to set QPS limits by data center at the Targeting Group level. You will also be able to toggle SmartSwitch on or off at the Targeting Group level. Both functions will be available in the UI later in Q2 2020.

18 **How do I learn more about Distribution Fees pricing?**

Contact your Account Manager or email support@bidswitch.net.

19

Can I manage Targeting Groups via an API?

Currently, no. You will need to use the BidSwitch UI to setup and manage all Targeting Groups.

20

What filtering criteria can be used to create a Targeting Group?

With Targeting Groups, you will have access to the same filters you currently have with Bidstream settings. Those include:

- ▶ Supply partner
- ▶ All traffic vs deals only
- ▶ Auction type (all traffic, 1st price only, non-1st price only)
- ▶ Country
- ▶ Language
- ▶ Device type (desktop, mobile, tablet, CTV)
- ▶ Ad type (Display, video, audio, native, DOOH, programmatic TV, interstitial)
- ▶ Display size
- ▶ Website and app whitelists
- ▶ Website and app blacklist
- ▶ Synced traffic

21

Do Targeting Groups apply to both deals and open exchange inventory?

You can specify when setting up a Targeting Group if it should apply to all traffic or just deals.

22

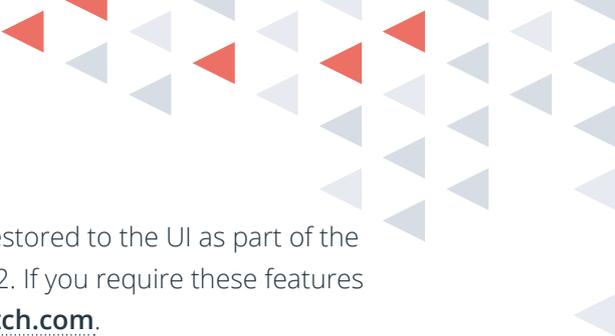
Where in the UI will partners be able to access Targeting Groups?

Once this feature is released, the current tab in the UI called Bidstream will be replaced with a new tab called Targeting Groups, which will be available from all subpages in the UI.

23

Will all current functionality be replicated in Targeting Groups?

In Phase 1 of the release, Deals Uploading and TruePrice management will be



temporarily hidden in the UI. These tools will be restored to the UI as part of the second phase of the release, scheduled for late Q2. If you require these features during this time, please contact support@bidswitch.com.

24 **Can I view how many Targeting Groups are applicable for my partners?**

Currently, there is no way to quickly see how many Targeting Groups a particular Supply Partner falls into, but we are always looking for feedback to make the feature more valuable. If this is something that would increase satisfaction, please let your account manager know.

25 **What happens if I stop trading with a Supply Partner who is included in multiple Targeting Groups?**

If you **STOP** trading with a Supply Partner, the Supply Partner will not be removed from the Targeting Group(s), but traffic will cease to flow from that partner.

If you **DISCONNECT** from a Supply Partner, the Supply Partner will be removed from the Targeting Group(s). If you **REACTIVATE** the Supply Partner, all settings will be set to neutral and you will need to redo any Targeting Groups.

26 **What do I do if I experience problems?**

Please contact your Account Manager or support@bidswitch.com if you observe any issues with your Targeting Groups configuration or trading activity.