Advantage Media Manager Ad Serving Integration

General

The Advantage Media Manager module includes an integration with Ad Serving providers. The feature includes the ability to upload placements and download reporting data (results) when available for the supported ad serving providers. The Media Manager module requires a Media Tools License, see the Media Manager Users Guide for details about how to access and use the Media Manager module. This guide specifically covers the Ad Serving feature within this module.

Supported Ad Servers:

- DoubleClick (DCM)
This section covers required settings that need to be established before using the new Ad Serving features.

**INTEGRATION SETTINGS**

*Found under Maintenance / General*

Activate the Ad Server integration(s). All supported Ad Servers will be listed in Integration Settings. Currently, we support DoubleClick (DCM).

DoubleClick (DCM) Integration

- Login to DCM [https://www.google.com/dfa/trafficking](https://www.google.com/dfa/trafficking) (or use link provided) and obtain your Profile ID. Enter it in the Profile ID field within Integration Settings for DoubleClick (DCM). The Profile ID must be related to the Email address used to grant permission (see below). Within DCM, the Profile ID is shown next to the user ID.
- Click on the check box to activate the DoubleClick integration.
- The Google Account Sign-In window will be displayed. Enter your DCM account email address in order to help Google find your account. Note: The email account and Profile ID must be related.
- A Request for Permission window will be displayed (see screen shot below). Click on Allow to give the Advantage API permission to interface with your DCM account for both placements and reporting.
SECURITY | GROUP, MODULE OR USER SETUP – To gain access to the Ad Serving module within the Media Manager, from within Security, under Media Manager Actions, unblock the Ad Serving action. This setting can be customized by group or user from within the security modules. The action button will only become available if an ad server has been activated in Integration Settings (as described above).
CLIENT MAINTENANCE | WEBSITES
Found under Maintenance / Client
The Websites tab in Client Maintenance stores default websites and landing pages that are sent with placements to ad servers. This may be required based on the ad server. Website Types may be created to categorize websites as landing pages or other pages as needed. Websites referenced as Landing Pages are associated with Campaigns in Advantage for later use when delivering placements. Client/Websites is available from within Campaigns for easy management of websites/landing pages required there.

- DoubleClick (DCM) requires a default landing page be associated with each campaign. The Landing Page URL and Name is specifically required. For each website, make sure to enter a name. Website URL must begin with either “http://” or “https://”. This is validated in Campaigns and in the Ad Serving module.
  - Because DCM controls the default landing page and id it is given, any adjustments to the landing page after the initial placement is created from Advantage must be made in DCM directly.

AD SIZE MAINTENANCE
Found under Maintenance / Media
The Ad Size is a required field when delivering ads to ad servers and they have their own coding systems, even on standard sizes. In Ad Size Maintenance, you can import and update 18 standard IAB ad size codes and the system automatically assigns supported ad server ID for each. Only ad sizes that include the support ad server ID can be used in placements.
INTERNET TYPES MAINTENANCE
Found under Maintenance / Media

Internet Types are required and identify the ad server compatibility (or type) depending on the ad server provider. Once a placement is created, the internet type cannot be changed on the related order.

- DoubleClick (DCM) – Internet Type is used to identify the Compatibility. The following Internet Types must be entered for use on media order lines/placements being sent to DCM. The Internet Type description is what is used in DCM, you can enter these with any code you wish.

<table>
<thead>
<tr>
<th>INTERNET TYPE DESCRIPTION</th>
<th>DISPLAY</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>DISPLAY_INTERSTITIAL</td>
</tr>
<tr>
<td></td>
<td>IN_STREAM_VIDEO</td>
</tr>
</tbody>
</table>

Campaigns

Campaigns are required for ad placements being sent from Advantage to supported ad servers. Campaigns can be created in Advantage at the client or client/division/product level. Once a placement is made, the campaign cannot be removed from the related order. Advantage Campaign requirements:

- Campaign must have a name. The system can auto-create the campaign code (recommended).
- Start Date and End Date. Campaign End Date must be today or later.

If you prefer to create campaigns in the Ad Server, Advantage can automatically create campaigns from supported ad server data in the Ad Serving module (see more details under Ad Serving below). Supported ad servers:

- DoubleClick (DCM)

Ad Serving

From within the Media Manager, prepare orders for ad serving and interact with the ad server to create and update placements with ease. In addition to creating and updating placements in the supported ad server, you can create advertisers and campaigns, and interact with the ad server without leaving the Media Manager module.

Depending on the ad server being used, there are requirements that must be met before ads can be placed.
DoubleClick (DCM) Ad Serving Requirements:

- Internet Orders – Placements (ads) are created from Advantage Internet Orders at the Line level. The orders must include the following information (fields) in order to be accepted in DoubleClick (DCM). The DCM field name is listed first (below) followed by the corresponding Advantage field name.
  - **Order Header**
    - Ad Server Site (Vendor) - Once established, stored in Vendor Mapping in Advantage.
    - Advertiser (Client) – Once established, stored in Client Mapping in Advantage.
    - Campaign (Advantage Campaign Name)
    - Campaign Start and End Dates (Advantage Campaign Start and End Dates)
    - Landing Page (Website Name on Campaign)
  - **Order Detail (Line Level)**
    - Ad Size (Creative Size)
    - Compatibility (Internet Type)
    - Placement Name (Placement 1)

Use the Media Manager module to update orders with all required information, if not already present. The Media Manager module includes the ability to edit all the information required to complete ads.

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**Ad Serving Grid**

From the Media Manager, select the Internet Orders for which ad placements are to be created in the Ad Server. Highlight one or all orders. Click on the Ad Server button and select the preferred Ad Server. Order lines will be grouped based on key order/line details to create one placement per group.

- Vendor
- Order Number
- Cost Type
- Internet Type
- Ad Size Code
- Placement Name

If any of the above fields are different, those order/line(s) will be placed in another group in order to create placements in DCM.
If a single order/line is selected alone, it will get its own placement ID. If any matching order/lines are to be added to the same placement ID, include the original placement line with the rest of the order/line(s) so the placement can be updated with the new order/line(s) details. If the single order/line is to remain on its own, make sure to omit this line when selecting order/line(s) from the same order to create Ad Serving placements.

All the required fields needed to create placements in the selected ad server are displayed. Many (most) of the Advantage fields are editable directly in this grid and some data can be synced between Advantage and DoubleClick (DCM) in some cases. Update required data as required before creating placements.

**Syncing Key Ad Server Data**

All required data will be validated within the grid and problem areas will be indicated with an icon. This module allows you to then take actions to correct and match data between Advantage and DoubleClick (DCM) automatically. Once you establish mappings for key data, future orders will validate automatically.

Before you create placements, the key data below must be validated. See below for instructions on how to easily complete this process.

- **Advertisers**
  - If Advertiser exists in DoubleClick - Select an existing Ad Server Advertiser from the list. Once completed, the selected Advertiser will be established in Client Mapping so it will automatically be recognized on all future orders for the same client.
  - If Advertiser does not exist in DoubleClick – Select Create Advertisers. This process creates the Advertiser record in DoubleClick and establishes the record in Client Mapping so it will automatically be recognized on all future orders for the same client. If for any reason the Client Mapping needs to be updated, this will have to be done manually in Maintenance | Client Mapping.

- **Campaigns**
  - If Campaign exists in DoubleClick - Select an existing Ad Server Campaign from the list. Once completed, the selected Campaign will be mapped to the Advantage Campaign so it will automatically be recognized on all future orders for the same campaign.
  - If Campaign does not exist in DoubleClick – Select Create Campaigns. This process creates the Campaign record in DoubleClick and maps the record to the existing Advantage Campaign so it will automatically be recognized on all future orders for the same campaign.

- **Ad Server Site**
  - The Ad Server Site must exist in DoubleClick.
    - Select the existing site from the list. Once completed, the selected site will be mapped to the Advantage Vendor so it will automatically be recognized on all future orders for the same vendor. If for any reason a change needs to be made after the vendor is mapped, this will have to be done manually in Vendor Maintenance.
    - Alternatively, you may insert or update information directly into the Vendor Mapping module to associate the DoubleClick Ad Server Sites with Advantage Vendors. However, this is a more tedious process and it’s easier to allow the system to do this during the Ad Serving process.

- **Campaign and Placement Dates**
- The Order/Line Start and End Dates must fall within the Campaign date range.
- The Placement End Date must be on or after the Start Date of the Placement and not later than the Campaign End Date.
- The Placement Start Date from Advantage will default the Testing Start Date in DCM to be the same date.

Create Placements

Once all validation is complete, simply click on Create Placements. Placements are created and placement data is cross-referenced back to the Advantage Order/Line. The Ad Server Placement Name is created using the Advantage Placement 1 field data plus the related Order and Line Number.

The following fields will be updated in Advantage with cross reference data from the placement for updating later.

- Ad Server Placement ID
- Placement Created By
- Placement Created Date
- Placement Revision By
- Placement Revision Date

The Media Manager Review grid displays the Ad Server Name and Ad Server Placement ID when a placement has been created.

Update Placement

Once placements are created, you may need to update placements with new information. The order/line revision, modified date and modified by fields are included in the Ad Serving module to help you determine which placements to update. Certain data cannot be updated in Advantage.

The following will be locked in Advantage after placements have been created:

- Client
- Vendor
- Campaign
- Landing Page
- Internet Type
You may edit the following information and then use the Update Placements option in the Ad Serving module to update the placements in DoubleClick. Once updated, the Placement Revision By and Placement Revision Date fields will be updated accordingly.

- Campaign Start and End Dates
- Placement Name
- Internet Cost Type
  - This update happens in the Media Manager Review grid or in the order on the line detail.
- Ad Size (Creative Size)

**Requires Update**

If there have been changes to an order/line after it has been assigned to a placement id in DCM, a Red Dot will appear in this column on the Ad Serving grid if any of the following.

- Row is part of a group and the group had Placement ID but row does not.
- More than one line in the group with same placement ID. More than one row has the same placement ID.
- If max line modified date time is greater than the placement create or modified date time.
- Row is cancelled in Advantage but not marked Archive in DCM.

If the Placement (Order) Start and End Dates need to be updated, this can only be done in the Media Manager Review grid. If the Placement (Order) Start Date is revised and Update Placements is used, the DCM Testing Start Date is updated to the same date.

Once a placement is created from an order, the order cannot be deleted.

Order/line(s) can be Cancelled in Advantage. If this is done, the placement update will have to be made in DCM directly as DCM does not “Cancel” placements, but only “Archives” them. Per DCM - "If you plan to use this placement in the near future, set its status to Active. When you archive placements, you can no longer assign ads to them. Archiving placements does not stop ad delivery. Ads that are assigned to the placement can still be delivered even after the placement is archived. To stop delivery, ask the publisher to remove placement tags. Then unassign the ads from your placement. You can also temporarily stop a particular ad from serving to a placement if you set “Include in rotation” to “No” in the Ad assignments section of your placement properties."
Archive a placement using the Placement Archived check box in Ad Serving. Set the archive in Advantage or in DCM and it will be noted here. Please follow the rules as stated above when it comes to archived placements in DCM.

A placement in DCM cannot be archived if multiple order/lines are attached to one placement ID and you have not cancelled all the lines associated with that placement.

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>Ad Size Code</th>
<th>Revised Date/Time</th>
<th>Placement ID</th>
<th>Placement Archived</th>
<th>Placement Created By</th>
<th>Placement Created Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/17/2017</td>
<td>1/29/2017</td>
<td>728 x 90</td>
<td>3/23/2017 4:29:00 PM</td>
<td>149176222</td>
<td>□</td>
<td>SYSADM</td>
<td>3/23/2017 4:30:00 PM</td>
</tr>
<tr>
<td>1/17/2017</td>
<td>2/26/2017</td>
<td>120 x 60</td>
<td>3/23/2017 5:09:00 PM</td>
<td>149175744</td>
<td>□</td>
<td>SYSADM</td>
<td>3/23/2017 4:30:00 PM</td>
</tr>
<tr>
<td>2/27/2017</td>
<td>12/31/2017</td>
<td>120 x 240</td>
<td>3/23/2017 3:57:00 PM</td>
<td>149175743</td>
<td>□</td>
<td>SYSADM</td>
<td>3/23/2017 4:30:00 PM</td>
</tr>
<tr>
<td>11/27/2017</td>
<td>12/31/2017</td>
<td>728 x 90</td>
<td>3/23/2017 4:41:00 PM</td>
<td>149178150</td>
<td>✔</td>
<td>SYSADM</td>
<td>3/23/2017 4:58:00 PM</td>
</tr>
<tr>
<td>1/30/2017</td>
<td>11/26/2017</td>
<td>728 x 90</td>
<td>3/23/2017 3:58:00 PM</td>
<td>149174473</td>
<td>□</td>
<td>SYSADM</td>
<td>3/23/2017 4:30:00 PM</td>
</tr>
</tbody>
</table>

**Clear Placement**

This feature permits the user to clear a placement on an order/line allowing it to be re-established with a new placement ID. By selecting this, the module will clear the line of any DCM placement details. When a placement is cleared in Advantage, it DOES NOT update DCM. If the order/line being cleared is not part of a grouping, the placement can be archived first before clearing the placement. Follow the rules listed above for archiving in DCM and what that means.