Getting Started in SpringServe

The SpringServe platform is designed with the user in mind. In SpringServe, you'll find that setting up tags is a breeze and reporting is updated in real time.

Update your settings

Basic Settings

You can force 2-Factor Authentication for all users in your account, update the contact information that is displayed to your DC partners, and define Tag Health for your supply. On the Default Settings tab, you can set Optimization Defaults, Supply Defaults, and Demand Defaults. Global account targeting can be set on the Targeting tab.

Users

Add new users to your account. You can create 5 types of accounts:

- Admin: can add users, adjust settings, create targeting lists, labels, tags, and run reports
- AdOps: have the same functionality as Admin users, but they cannot create new users
- Analytics: have full read and reporting access, but cannot create or edit objects in your account
- Supply Client: can see reports for the supply partner(s) specified
- Demand Client: can see reports for the demand partner(s) specified

Admin, AdOps, and Analytics users can be marked as account contacts. Check this box if you want this user to receive automated reports from SpringServe.

Troubleshooting

Use the troubleshooting tool to diagnose issues with your traffic

Tag Tester

Test your managed supply tags and see if you are receiving the expected response.

Changelog

The Changelog is a helpful tool for using SpringServe. Here, you can see all changes made to your tags, who made the changes, and what the change was made. The changelog can be filtered by time frame, user, object, and change type.

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Targeting

Create targeting lists on the targeting page. SpringServe offers targeting on multiple levels. Targeting lists can be created for domain, app name, app bundle, IP address, and device IDs. You can also create custom keys on the targeting page.

Make Your DirectConnections

On the Direct Connections page, you will see other SpringServe partners that are available to connect with you. Click the "Connect" button in the last column of this table to request to connect to a partner and specify clearing terms.

Learn more about DirectConnect here.

If your account is enabled for ProgrammaticConnect, you will also see the External Bidders tab on the DC page. This tab shows programmatic partners available in SpringServe.

Learn more about Programmatic Connect here.

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Create Your Demand Tags

On the main **Demand** page, you will see a table of your demand partners and performance metrics for the time period specified. Toggling from Lite to Full will show additional metrics in the table. See the Reporting glossary for a definition of terms.

The other tabs show similar tables for Campaigns, Demand Tags, Open Market (if applicable), and Demand Labels, which can be associated to your demand tags.

Create new partners, campaigns, and labels by clicking the "+ Demand Partner", "+ Campaign", or "+ Demand Label" in the appropriate tab and fill out the required information.

Create a new Demand Tag by clicking the "+ Demand" button on the Demand tab.

On the **Settings** tab, enter your tag's information. For more details, go to the Demand page.

Once you have entered the endpoint URL provided to you by your demand partner, make sure that you replace the macros with SpringServe macros, within double curly brackets. For example, if you receive this tag from your demand partner:

> http://vid.springserve.com/vast/1?w=[WIDTH]&h=[HEIGHT]&url=[DOMAIN]&cb=[CACHEBUSTER]

This is what you will change it to:

> http://vid.springserve.com/vast/1?w={{WIDTH}}&h={{HEIGHT}}&url={{DOMAIN}}&cb={{CACHEBUSTER}}

On the **Supply Tags** tab, click the "+ Supply" button to align your Demand Tag to your Supply Tag(s). You can also align the Demand Tag to Supply later, when you are updating Supply Tags.

Add **Targeting** to your Demand Tag in the Targeting tab.

After saving the Demand tag, you'll see all the changes in the **Changelog** tab, where you can filter by time frame and user.

For more information, please go to the Demand page.

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Create Your Supply Tags

On the main **Supply** page, you will see a table of your supply partners and performance metrics for the settings specified in the top right. Toggling from Lite to Full will show additional metrics in the table. See the Reporting glossary for a definition of terms.

The other tabs show similar tables for Supply Tags and Supply Labels, which can be associated to your supply tags.

Create new partners and groups by clicking the "+ Supply Partner" or "+ Supply Label" in the appropriate tab and fill out the required information.

Create a new Supply Tag by clicking the "+ Supply" button on the Supply Tags tab.

On the **Settings** tab for a supply tag, enter your tag's information. For more details, go to the Supply page.

In the **Demand** tab, click the "+ Demand" button to align Demand to your Supply Tag. Make sure to align the right kind of demand to your supply tag. For desktop and mobile tags, align any type of demand; for CTV, align VAST only demand.

Once you have added your demand tags, you can arrange them in the waterfall. More information on how to set a waterfall can be found on the Supply tab.

You can optimize your waterfall manually or automatically. SpringServe offers auto optimization, which is enabled by default on your tags if you do not change the account defaults. To disable it or to change the parameters, go to the **Optimization** tab. Default parameters are as follows:

- Optimization Metric: Fill Speed
- Lookback Minutes: 60 (1 hour)

For each request, optimization calculates the Optimization Metric selected based on the Lookback Minutes specified. The algorithm will reprioritize your demand tags based on their performance during the lookback window. Read more about optimization here.

Add targeting to your Supply Tag in the **Targeting** tab. Note that "Blocked" requests are a result of your supply tag targeting and you will not be charged based on these unusable requests to SpringServe.

After your tag has been saved, you can export it from the **Export Tag** tab. If there are specific macros that you need to pass to your demand partners, make sure to include them on the tag that you export.

On the **Changelog** tab, you will see all changes to the tag, with the option to filter by time frame and user.

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Look at Your Reports

The **Create Reports** page will automatically load the settings to run your default report, which you can set by going to saved reports or by editing your profile. You can run reports for your SpringServe tags by multiple dimensions, use a number of filters, and set conditions to show exactly what you would like to see.

Click the button next to the Run Report button to download your report.

If you run a very large report, SpringServe will prompt you to name the report and continue to the **Download Report** page, where you will be able to download your report once it has completed.

Note that domain data is maintained for 100 days, after which point it is unavailable through the UI or via the back end. Please scheduled reports or run monthly domain reports for your archives as an end-of-month task if you foresee the need for this data.

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Account Activity

Account activity is the homepage when you log in. It displays a number of graphs and tables that will help you to visualize your performance and financials in SpringServe to assist with optimizing in the platform.

Hover over any graph to view a snapshot of the metric values for the highlighted time interval. To navigate back to this page, go to Reporting > Account Activity or click on the SpringServe logo in the upper left corner of the screen.

Learn more about Account Activity here.

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