Account setup guide for publishers (sites/apps and ad tags)
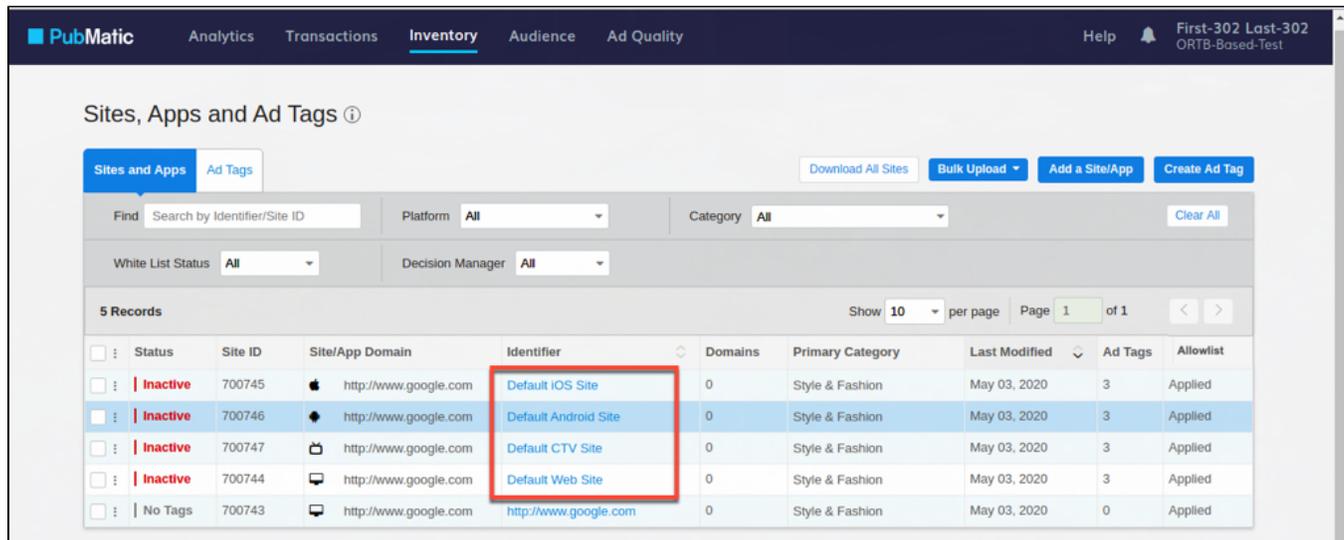
Use the steps and guidelines below to set up publisher accounts in the PubMatic UI. For bulk uploads, see Bulk uploading sites, ad tags, and domains.

Default sites and ad tags

OpenRTB and wrapper accounts are automatically configured with default sites and tags. This expedites the account set up, reduces the impressions that are passed back due to missing site and/or tag configuration, and means customers can start monetizing impressions immediately.

> **About default sites and tags:**
>
> - PubMatic creates default web, Android, iOS, and CTV sites, each configured with a banner, video and native ad tag during the account setup process (see images below).
> - Publishers should configure their own sites and tags, in addition to the defaults, for more granular reporting.
> - Default sites and ad tags can't be edited or deleted.
> - Ad tags can't be created for default site.

Create sites, apps, and ad tags

Adding sites and apps in PubMatic greatly enhances the granularity of reporting for publishers. Apps are added for mobile applications and sites are often created for different areas of a website (for example, the home page and subpages for news, entertainment, etc.) Ad tags contain the size, type, relative location and other parameters that define the inventory a publisher wants to display on the site or app.

> ✓ Ad tags are associated with specific sites or apps. Add your site or app before creating an associated ad tag.

Create a new site

> If you have multiple sites to add, see Bulk uploading sites, ad tags, and domains.

1. Select **Inventory > Sites & Tags**.
2. Select **Add a Site/App**.

3. Select platform type from the list.
4. Enter the fully-qualified site domain.

> ⓘ The URL must start with **http://** or **https://** and contain **.com** or the equivalent at the end.

5. Enter a name for the **Site Identifier**. This will appear in reporting, so use a name that you'll easily recognize.
6. Click **Secure** if the site is compatible with the HTTPS protocol.
7. Complete the details in the **Configuration Preferences** section.

    a. Select the **Primary IAB Category** to which your site belongs.
    b. Select the approximate number of **Monthly Ad Impressions** on your site.
    c. Add URL of the page where your site's **privacy policy** lives.
    d. Select **COPPA Compliant** if your site is child-directed. More about COPPA.
    e. Check the **API Settings** box based on the integration type:

Integration type	Check the API Settings box?
Open Bidding	Yes
Index integrations	Yes
Server-to-server	Yes
Transparent Ad Marketplace (TAM)	Yes
Prebid integrations	Yes

    f. The **Content Object** describes the content in which the impression appears. This setting determines if and where you'd like the content object parameters distributed when the ad call is passed. See IAB spec, OpenRTB v2.5 section 3.2.16 for more information.

- **Pass All**: Content object values are used within PubMatic AND are passed in bid requests to all DSPs (PMP deals and open exchange).
- **Pass PMP**: Content object values are used within PubMatic AND are passed in bid requests with PMP Deal IDs.
- **Don't Pass**: Content object values are used within PubMatic, but never get passed to buyers in the bid stream.

8. Save this site.

Create an app

1. Select **Inventory > Sites & Tags**.
2. Select **Add a Site/App**.

3. Select a Mobile App platform (**iOS** or **Android)** or **CTV** from the **Platform** list.
4. Enter the fully-qualified domain for the associated site. The URL must start with **http://** or **https://** and contain **.com** or the equivalent at the end.
5. Enter a name for the **App Identifier**. This will appear in reporting, so be as descriptive as possible.
6. Select **Secure** if the site is compatible with the HTTPS protocol.
7. **For Mobile App iOS or Mobile App Android:**
If the app is available in the App Store, toggle **Availability on App Store** to **Yes** and enter the App Store URL. Click **Lookup on App Store** to complete the available information below.

    For CTV:
From the **App Store** drop-down, select either **Roku** or **Other**.

> ⓘ **Roku**: If the CTV app is present on the Roku app store > select **Roku** and then specify either the Roku app store URL or the Roku channel ID in the **App Store URL/ Bundle ID/ App ID** field > click **Lookup on App Store**.
>
> The system will retrieve the app details from the Roku app store and populate those details in the **Configuration Preferences** section. If the app doesn't exist on the Roku app store, an error message will be displayed.
>
> **Other**: For other apps - such as Amazon, Samsung, etc. - select **Other** > enter the **App Store URL** (required) > enter either the alphanumeric **Bundle ID** or the numeric **App ID**.

8. Complete **Configuration Preferences**:

    - Select a **Primary Vertical**.
    - Select **Monthly Ad Impressions** for the app.
    - Add URL of your **privacy policy**, if desired.
    - Select **COPPA Compliant** if the app is child-directed.

The United States Federal Trade Commission has changed the compliance rules for the Children's Online Privacy Protection Act ("COPPA"), effective July 1, 2013. The proposal affects websites and applications that have been identified as: (1) directed to users under 13 years of age; or (2) collecting information from users known to be under 13 (collectively "Children's Sites").

For an impression meeting any one of the above-mentioned criteria, the COPPA field must be selected.

The FTC has written a comprehensive FAQ on complying with COPPA at http://business.ftc.gov/documents/Complying-with-COPPA-Frequently-Asked-Questions .

- Check the **API Settings** box based on the integration type:

Integration type	Check the API Settings box?
Open Bidding	Yes
Index integrations	Yes
Server-to-server	Yes
Transparent Ad Marketplace (TAM)	Yes
Prebid integrations	Yes

- Select **Override Publisher Data** to give a higher preference to application information stored in PubMatic over publisher-provided information.
- Specify which mobile rich media versions the app supports if any.
9. Click **Save Site/App** or **Save and Add Another Site/App** (to save this and open a new form to complete for another app).

[Save and Add Another Site/App]   [Save Site/App]

Create an ad tag

ⓘ   If you have multiple ad tags, refer to Bulk upload ad tags for instructions.

An ad tag is HTML or JavaScript code that your webmaster or developer inserts into the source code of a web page. There is usually a separate ad tag for each ad that you want to display on your website. You can add an ad tag for every site you add. The more sites/tags you have, the more granular your reporting will be.

1. Select **Inventory** > **Sites & Tags** > **Create Ad Tag**.
2. Select from the **Site/App** from the list the site or app you want to apply the ad tag to.

ⓘ   **Mobile Ad Server** will automatically be selected with your mobile ad server when adding a mobile ad tag.

3. Enter the **Format Type** and **Response Code**.

ⓘ   **App ad tags**

When creating an ad tag for an app, the response code will default to HTML 5 and the MoPub mobile ad server. See How MoPub tags work to learn more.

ⓘ   **See also…**

Refer to Creating Video Ad Tags in PubMatic below for options related to creating ad tags for video ads in PubMatic.
Refer to Creating Native Ad Tags in PubMatic below for options related to creating ad tags for native ads in PubMatic.

4. Complete **Ad Slot Preferences**:
   a. **Primary Ad Size**: This option only appears when **Banner/Rich Media** is selected. Select the **Primary Ad Size** from the list. You can also select up to nine **Additional Ad Sizes**.
   a. **Ad Placement**: Select the placement of the ad relative to the page (Top, Bottom, Middle, Left or Right of Page).
   a. **Fold Placement**: Select the placement of the ad relative to the fold (Above the Fold (ATF), Below the Fold (BTF), or Partially above the Fold).
   a. **Expansion**: Select the direction the ad will expand (Up, Down, Left or Right).
5. Select **User Data Parameters**. Default parameters will display based on requirements for the site or app selected in the Configuration Details section. Include as many parameters as possible, selecting each from the drop-down.

6. Add a passback by either using **Select Existing Placement** and selecting from the list or to add a new passback, choose **Provide Passback Script**. The PubMatic system will automatically recommend an ad tag name, however, this can be customized as needed.
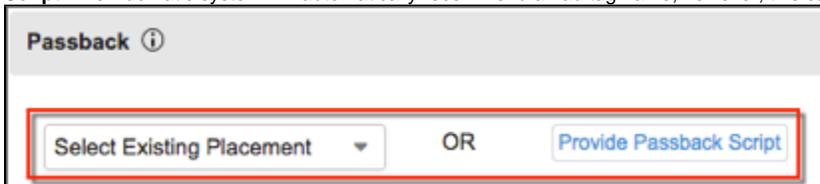
ⓘ **When creating EB ad tags**, select **Provide Passback Script** and add **USD 0.0** for **eCPM**, and for the script, simply add **<!>.**

⚠ **Every tag-based account requires a passback**

This ensures that if PubMatic doesn't fill an ad space, the system will prevent a blank ad occurrence.

Edit sites/apps, ad tags, and network mapping

⚠ Default sites and ad tags can't be edited or deleted.

You can edit sites and apps in the **Sites and Apps** screen, and the ad tags and network mappings in the **Ad Tags** screen. Simply click the   icon to view the options for each row. If an option is grayed-out then it's already applied. For example, if an allowlist has already been applied, the **Apply Allowlist** feature will be grayed-out.

ⓘ The JavaScript, Iframe, and HTML ad tags for Desktop and Mobile Banner ads now contain the kadGdpr and kadGdprConsent fields, while the Desktop and Mobile Video ad tags will contain the gdpr and gdpr_consent fields.

If the kadGdpr or gdpr field is set to 1, then it indicates that the given impression must be subjected to the GDPR compliance process. If set to 0, then the given impression is not GDPR compliant and will be processed as usual.

The kadGdprConsent and gdpr_consent fields should contain the visitor's GDPR consent data; that is, whether they have provided their consent for being targeted or not.

Download sites

From the Pub UI main navigation, select **Inventory** > **Sites & Tags**. You can view all of your sites, or you can filter them by **Platform**, **Category**, **Allowlist Status**, **Status**, and **Domains**.

To download a list of sites, click **Download** then select **All Sites** or **Filtered Sites**. When you download filtered sites, your list will not contain sites that you filtered out.

Ad network addition and mapping

If you are working with an Ad Network, use these instructions to add them to the PubMatic system.

1. Select **Inventory > Ad Networks and Placements** from the main navigation.
2. Select **Link Ad Network**.
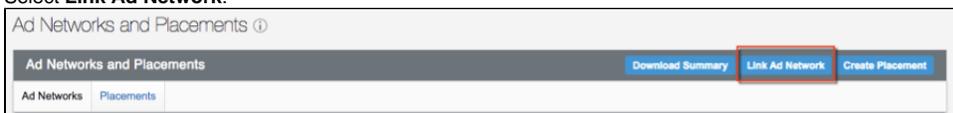
3. Select **Filters** to expand the section, enter the name of your Ad Network in the Find box and choose Go to search for it.

4. Once the Ad Network is located click **Create Placement**.
5. Complete the **Add Placement details** and edit the auto-populated name, if required, and choose **Save Placement** or **Save and Add Another Placement.**

Mapping ad network placements to an ad tag

1. Select **Inventory > Sites & Tags** from the main navigation.
2. Select the ellipsis button ⋮ next to the ad tag you want to map to a placement.
3. Select **Edit Ad Network Mapping**.
4. Click **Select Ad Networks**.
5. Select the **Ad Network** and then its associated **Placement**.
   Add the placement to the list of mapped placements.
6. Save the ad network placement–it is now successfully mapped to the ad tag.

> ⓘ You can also confirm the mapping is successful by using **View Placements** on the Ad Tags page.

Passback management

The process to add passback tags is similar to adding Ad Network tags.

> ⓘ **Apps with MoPub ad server**
>
> Passback selection is not required for pure tag-based publishers for a combination of apps and the MoPub Mobile ad server because MoPub passbacks are automatically linked internally.

There are two ways to add passbacks:

1) While creating a new ad tag:

2) Add a passback Ad Network variant followed by the passback tags as placements. You can further map those placements to the respective ad tags.

> ⓘ Passback ad network mapping is mandatory for tag-based accounts, but optional for API and ORTB accounts.

Blocklist manager

Blocklist Manager helps you avoid the display of unwanted creative to your visitors by blocking the advertiser, advertiser category, domain URL and/or creative attributes. Blocklist Manager enables you to view the domain URLs for an advertiser and block/unblock accordingly.

For instructions and best practices for using Blocklist Manager, refer to the following documentation in the Marketplace Quality section of the community:

1. Blocking an Advertiser, Category or Domain
2. Blocking and Managing URLs Using Keywords
3. Blocking a Domain URL
4. Exporting a Blocklist Report
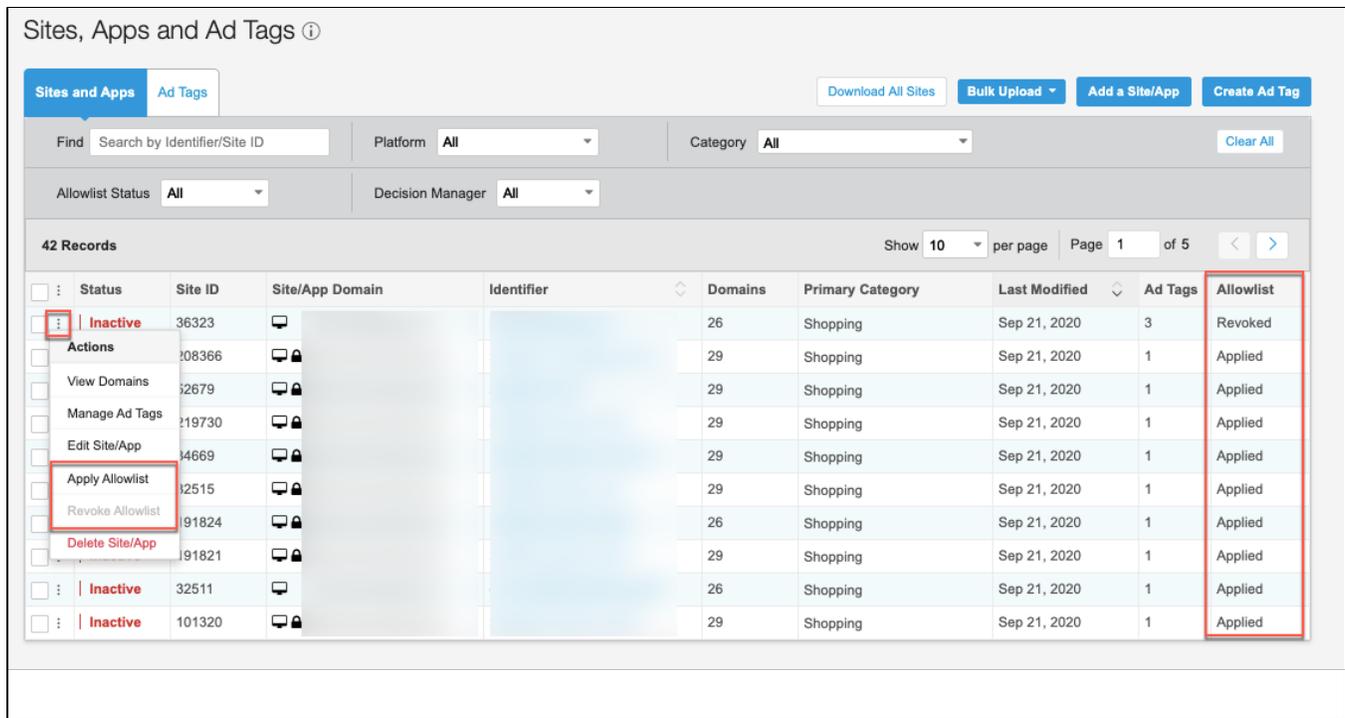5. Schedule Delivery of a Blocklist Report
6. Blocklist Alerts

Allowlisting advertisers

The Allowlisting feature must be enabled on your account. If you would like to enable allowlisting for your account, contact your Customer Success Manager or Customer Success Operations, Manager. The Allowlist Manager enables the display of specific creative to visitors by allowlisting URLs, advertisers or advertiser categories. The Allowlist Manager displays the advertiser URL for you to enable or disable for allowlisting. This process facilitates a safe and time-saving allowlisting of URLs within the PubMatic interface.

Using the allowlisting feature, you can:

1. Allowlist domain URL, advertiser, or advertiser category for all sites or select just a single, specific site.
2. View available domain URLs for allowlisting and apply/revoke the allowlist as needed. Note: if you revoke the allowlist for a website, the blocklist configuration will be applicable for your inventory.
3. View, schedule, , and email allowlisted advertiser categories, advertiser and domain URLs for all or any specific sites.download
4. Select **Apply/Revoke Allowlist** for a site

To apply or revoke an allowlist for a site, click the vertical ellipsis ⋮ to the left of the site you want to affect and select Apply allowlist or Revoke allowlist. The allowlist status will display in the Allowlist column.

For additional instructions and best practices for using Allowlist Manager, refer to the Allowlist Manager documentation in the Marketplace Quality of the community.