Cadent

# Cadent help center

# 1. Welcome to the Cadent Help Center!

The Cadent help center is your resource for understanding and navigating the platform. It provides detailed articles and clear instructions to support your work. You can search for specific topics or browse the content. Below you'll find some of the most common topics to help you get started.

- Campaign set up
- Campaign management
- Campaign best practices
- Audience set up and deployment
- Audience best practices
- Report set up and management

## Campaign set up

Setting up a campaign is one of the first things you'll do in the Cadent platform. The diagram below illustrates the campaign hierarchy, and the articles that follow will guide you through the steps you'll take to set up a campaign.


- Advertisers
- Add a campaign
- Add a line item
- Add an ad group
- Add a creatives
- Assign a creative

## Campaign management

These articles provide valuable information as you set up your campaign.

- Configure targeting
- View rate card
- Approve draft creatives
- Preview and test a creative
- Creative specs

## Campaign best practices

These articles take a deeper diver into topics you'll encounter as you refine and optimize your campaigns.

- Frequency caps
- About budget and pacing
- Line item KPIs
- Ad group models, optimization, predictive KPIs, and bidding
- Creative specs

## Audience set up and deployment

These articles teach you how to onboard your data, build an audience and deploy it.

- Create and edit datasets
- Create and edit audiences
- Create a lookalike audience
- Deploy an audience

## Audience best practices

These articles take a deeper diver into topics you'll encounter as you refine and optimize your audiences.

- View real-time audience insights
- About test control groups
- About taxonomies
- Compare overlap in first-party segments, datasets, and audiences

- Manage group opt-out options

## Report set up and management

These articles help you get started with reporting on your campaigns.

- About Ad Hoc reports
- Create and edit Ad Hoc Reports
- Bidding Details Report

# 2. Migration FAQs

## Overview

The goal of this migration is to transition clients from the AdTheorent Legacy Platform to the new Cadent Platform. The FAQs below aim to answer questions you might have before and during your migration to the new Cadent Platform. If you have additional questions, reach out to your Cadent Account Manager.

## Migration definitions

Some of these FAQs use these acronyms:

- **Migration Month** (MM): The month an Agency will be migrated from Legacy to the Cadent Platform
- **End of Migration Month** (EOMM): The last weekday of the MM
- **Launch Day** (LD): The day all agency campaigns are running in the Cadent Platform (New + FROAM)
- **FROAM Campaigns**: Campaigns that need to **F**inish **R**unning **O**n **A**d **M**anager

## FAQs

## New features: What's new/improved in the new Cadent platform?

This table provides an overview of the new features and enhancements available in the new Cadent platform.

| Feature | Details | Legacy | New Cadent | Enhancements |
|---|---|---|---|---|
| Health | Ability to build a | ✔ | ✔ | LLM based search, AND-OR |

| Feature | Details | Legacy | New Cadent | Enhancements |
|---|---|---|---|---|
| audiences | predictive audience with health data. | | | logic, direct advertiser tagging and assigning to ad group |
| 1P Onboarding | Directly upload and activate first-party data. | | ✔ | Direct onboarding without needing to go through LiveRamp |
| Audience Insights | Key insights into data sets and audiences including gender, location, income, device. | | ✔ | Real-time insights into onboarded data and audience makeup |
| Audience Builder | Build a custom audience based on 1P and 3P data. | ✔ | ✔ | Real-time reach and insights counts |
| Campaign & Line Item Details* | Campaign & Line item setup | ✔ | ✔ | Streamlined UX & Data rep. for quicker data viewing. Line Item channel designation automates downstream settings. |
| Ad Group Details | Core setup and performance data for ad groups. | ✔ | ✔ | KPI to model mapping and optimization to optimizer mapping |
| Client API | Ability to build and manage an ad campaign via external-facing APIs. | | ✔ | API for Advertiser, Campaign, Line Item, Ad Group. Creatives coming soon! |
| Ad Serving/ Creative Management* | Create, preview and manage creatives across all campaigns. | ✔ | ✔ | Templated creative setup allows for streamlined creative trafficking |

| Feature | Details | Legacy | New Cadent | Enhancements |
|---|---|---|---|---|
| Pixel Management* | Create and manage 1P pixels for campaign conversion tracking and measurement. | ✔ | ✔ | Line item pixel mapping allows for more granular KPI conversion mapping |
| Bidding Details/Log* | Granular reporting and logs for bid requests optimize bidding strategies and troubleshoot delivery. | ✔ | ✔ | Ability to view bid details at both line item and ad group levels |
| Targeting Management* | Create, apply, and manage complex targeting objects across Agencies & Advertisers. | ✔ | ✔ | Ability for self-service users to manage objects at an agency or advertiser level |
| Targeting Options* | A vast library of targeting settings for campaign activation, such as Location, Device & Content Targeting | ✔ | ✔ | Consistent user experience across targeting options |
| Direct connections to publishers | Direct integrations with publishers for streamlined inventory access. | | ✔ | Cadent Inventory Manager |

## Migration process: How does it work?

We provide a seamless migration that protects your campaign performance, with our dedicated teams supporting you at every step.

- **Collaborative support:** Your agency will be fully supported by our Account Management, Technical, and Product teams.
- **Flexible timing:** We offer month-end or phased migrations to fit your schedule and minimize disruption.
- **Streamlined platform:** You will transition to a single, modern interface for all new campaigns.
- **Campaign status:** Migrated campaigns will be Paused and ready for your relaunch—legacy campaigns will become read-only for your records.
- **Historical data:** We offer the option to migrate historical data for all your active advertisers.

**The Migration Process at a Glance**

| Step | Description | Timing | Who's Involved |
|---|---|---|---|
| 1 | Plan & Schedule | 1+ month before migration | Cadent & Client |
| 2 | Campaign Review | Beginning of Migration Month | Cadent & Client |
| 3 | Technical Migration Prep & Quality Assurance | Migration Month | Cadent |
| 4 | Platform Training | 3 weeks prior to migration | Cadent & Client |
| 5 | Pause Legacy Campaigns & Go-live on the New Cadent Platform | On Launch Day | Cadent & Client |
| 6 | Enhanced Post-Launch Support | 30 days+ post-launch | Cadent & Client |

## Migration deadline: When do we have to migrate?

We don't have a migration deadline yet. See the question directly above this one to learn more about the migration process.

## Historical data: Can historical campaigns be migrated?

Yes, completed campaigns—including all associated child layers—with start dates from January 1, 2024 through the current date can be migrated.

## Platform retargeting: Will this be available?

Yes, Platform Retargeting will be available. However, IDs collected in the AdTheorent Legacy DSP can only be Platform retargeted in that DSP.

## Predictive audiences: How will they be migrated?

Legacy Predictive Audiences will be migrated into Audience Manager and made available in Ad Manager ahead of the campaign migration. During the campaign migration, all strategy primary AdTheorent Predictive Audiences (if any) will automatically be assigned to the appropriate ad group in Ad Manager. AdTheorent Predictive Audiences will appear in the Ad Group Audiences screen.

## IDs: Are they carried over to the new Cadent platform?

No, campaigns and their child objects will receive new IDs once migrated, with the exception of pixels. Pixels will maintain their legacy IDs, so brands don't have to add new pixels to their websites after migration.

## CPA models: How will they be handled in the migration?

CPA models can migrate with a FROAM campaign, as needed. After a FROAM CPA campaign has been migrated, the existing CPA model will be updated to include the new campaign ID, so there will be no gap in model learnings or model performance.

## Reporting: Can I pull reports for campaigns running in both platforms?

You will continue pulling legacy reports in the legacy Report Builder. Ad Manager reports will be available in the Ad Hoc Reporting feature. For data field consistency across platforms, your Account Manager can help you find the appropriate API-driven report templates to use in the legacy Report Builder.

**Learn more**: About Ad Hoc reports

## Pixels: Can they be migrated?

Yes, Pixel IDs will be retained on migration so that brands don't have to replace them on their sites.

- Preferred timing for pixel migration is after all campaigns using pixels for performance on the legacy platform are complete.
- If the preferred timing isn't possible, pixels can be migrated and used on both platforms for a short period of time (within the same MM). When using this method, the new Cadent platform will be the source of truth for ALL migrated pixel rules.

## Geo targeting: Has the process for combining multiple targeting selections changed?

Yes, the method for combining multiple targeting selections has been streamlined to provide a more intuitive and powerful workflow.

**Learn more**: [The new Geo targeting logic]

## 1P data: Can I upload 1P data without going through LiveRamp?

Yes, in the new Cadent platform you can upload and activate 1P data without going through LiveRamp.

## Insights: Will I have real-time insights into onboarded data and audience makeup?

Yes, you'll have access to key insights for datasets and audiences, including gender, location, income, and device.

**Learn more**: [View real-time audience insights]

## APIs: Can I use APIs to build and manage my ad campaigns?

Yes, Cadent has established a set of programmatic services built on RESTful APIs.

**Learn more**: [Cadent APIs]

## Creative bulk upload: Can I bulk upload creatives?

You can currently bulk upload 3P creatives. 1P hosted creatives can be bulk uploaded in Q1 2026.

**Learn more**: [Bulk upload 3P creatives]

## Campaign hierarchy: Is it that same in the new Cadent platform?

This chart illustrates the new Cadent platform campaign hierarchy, and the features within each level.

Note that 'Strategies' in the legacy platform are now called 'Ad Groups' in the new Cadent platform.

Learn more about setting up a campaign in the new Cadent platform: [Campaign quickstart]

## Currency types: What currencies can I transact in?

The currencies below are supported in Ad Manager. You'll set the currency type when you add a campaign.

**Learn more**: **Add a campaign**

- USD
- AUD
- CAD
- CHF
- CNY
- EUR
- GBP
- JPY
- MXN
- SEK

# 3. Glossary

## A

**Action activity**: This pixel type is used to track a click action when there is no change in the URL. For example, if you want to track a specific action, like a "Buy now" button. The Action activity can be placed on the specific button HTML to be tracked.

**Activity**: An activity is a way to further define the universal tag. You'll use an activity to log universal tag fires and for the purpose of retargeting users. You need to create a universal tag before you add activities.

**Ad tag:** A snippet of code that's placed on a webpage, to define exactly where and what ad will be displayed.

**API**: (Application Programming Interface) A set of access points and tools that enable developers to build custom workflows and applications that can access certain features and data.

**Attribute**: The seven health-specific categories you'll select to build a predictive health audience. They include: Diagnosis, Procedure, HCP, Rx, Pharmacy, Insurance, and Patient Info.

**Attribute items**: A specific data point within an attribute. For example, 0054-0326 fluticasone propionate and salmeterol, and 0054-0327 fluticasone propionate and salmeterol are both RX attribute items.

**Attribution:** The process of identifying and assigning credit to various touch points that contribute to a desired outcome, such as a sale or conversion. It aims to understand which channels, campaigns, or actions are most effective in driving customer engagement and conversion.

**Audience:** A strategic target group for an advertising campaign, defined as a subset of one or more datasets that have been ingested into the platform. An audience can also be built from another existing audience.

**Audio VAST tag URL**: A URL that points to an XML document containing information for serving an audio ad. It acts as a bridge between an ad server and a media player, allowing the player to request and display audio ads according to these instructions.

# B

**Bid request**: The signal an SSP sends to a DSP that enables the latter to purchase ad inventory.

**Bid response**: The signal a DSP sends to an SSP in response to a bid request. In a bid response, the DSP indicates a bid price and usually the creative specs.

**Bitrate**: The amount of video data (bits) processed per second, directly controlling video quality and file size. The higher the bitrate, the higher the video quality.

**Blockgraph**: An identity and data collaboration platform that enables different companies in the media ecosystem to securely share and match audience data without directly exposing their underlying sensitive information. It is not a data provider, but a neutral intermediary that facilitates data sharing in a privacy-compliant manner.

# C

**Companion ads**: A display ad shown alongside a video or audio ad, usually displayed on top of or along the side of the player.

**Clickthrough URL**: The webpage a user is directed to when they click an ad.

**Cloning, audiences**: Is a method for creating a new audience with the attributes of an existing audience.

**Companion ad**: A display ad shown alongside a video or audio ad, usually displayed on top of or along the side of the player.

**Control group**: Defined at the household level, a means of measuring the effectiveness of a campaign. Exclude a percentage of an audience from seeing the campaign ads and compare the conversion results of the control group against that of the other members of the audience. For example, if the members of the control group bought as many cars in an auto campaign as the rest of the audience, then the campaign is not effective since the control group has not seen the ads.

**Conversion**: A measurable action or event, such as an online purchase or a physical store visit that is attributed to an ad campaign. It represents a successful outcome, proving that the advertising has influenced a consumer's behavior. The Cadent platform has a powerful Attribution Engine designed to track and analyze these events.

**CPM (cost per mille)**: Refers to the average cost per 1,000 ad impressions. Mille means 1,000 in Latin.

**CPT (Current Procedural Terminology)**: CPT codes are a standardized set of medical codes used to describe medical, surgical, and diagnostic procedures.

# D

**Data Marketplace:** Provides a centralized location to browse and select premium third-party data providers and their syndicated segments to be used for targeting in advertising campaigns.

**Dataset:** The platform takes input files, processes them, and generates matched datasets, which are used to build audiences.

**Daypart:** The Neislen defined periods of the day divided into time blocks, which are often used for targeting specific demographics.

- **Early Morning** - 5 AM to 9 AM
- **Daytime** - 9 AM to 4 PM.
- **Early Fringe** - 4 PM to 7 PM.
- **Prime Access** - 7 PM to 8PM
- **Prime Time** - 8 PM to 11 PM
- **Late News** - 11 PM to 11:30 PM
- **Late Night** - 11:30 PM - 2 AM
- **Overnight** - 2 AM to 5 AM

**Deal ID**: A deal ID is a unique identifier that establishes a direct connection between a publisher and advertiser.

**Deployment:** A managed process in which an audience (a defined group of households or devices) is made available for use in advertising campaigns and for other external and internal platform integrations. This process is what activates an audience for targeting.

**Distinct patients**: This is the total count of patients in a Health Audience.

**DMA (Designated Market Area)**: A geographic regions used to define television and radio markets.

# F

**First-party dataset:** Comprised of information an organization gathers directly from its users through their interactions with its websites, apps, products, or services. The organization itself is the owner and controller of this data.

**FreeWheel:** A Comcast Company, a leading provider of ad management and monetization solutions for the television industry. For Cadent, FreeWheel functions as an external ad server that facilitate the delivery and measurement of advertisements in video content.

# G

**Google tag sheet**: A Google tag sheet is a file exported from Google Campaign Manager (GCM) that organizes ad tags and is used for creative bulk uploading. Cadent supports .xlsx or .xls Google tag sheets.

# H

**HCP:** HCP stands for Healthcare Professional. It refers to individuals who are licensed and trained to provide healthcare services to patients. For example, doctors, nurses, and pharmacists.

**HCPCS (Healthcare Common Procedure Coding System)**: HCPCS codes are a standardized set of codes used by healthcare providers to submit claims for medical procedures, supplies, products, and services.

**Household:** In the Cadent platform, this is the fundamental unit for identifying and targeting audiences. It is a cluster of various digital signals and personal identifiers that are algorithmically grouped together to represent a single, addressable entity for advertising purposes. This *household* can contain a traditional family, a group of roommates, or even a single individual.

**Household crosswalk ID:** A system generated synthetic ID associated with a zip11. It requires an out of the system match exercise to map your household universe with ours using a synthetic key. This prevents exchanging any PII data for data onboarding. Please contact your account representative to setup a crosswalk.

# I

**ICD-10 (International Classification of Diseases, 10th Revision)**: A diagnostic and procedure coding system endorsed by the World Health Organization (WHO).

**Impression goal**: The target number of impressions that a campaign's line item will serve.

**Impression limit**: The maximum number of impressions served in a given time interval. (e.g., 10 times per month).

# K

**KPI (key performance indicator)**: A measurable value showing how well an ad campaign achieves its goal.

# L

**Lookalike audience:** A new group whose members share similar characteristics and behaviors with an advertiser's existing audience. It is a method of audience expansion that uses a "seed audience" to model and find a larger group of similar consumers, with the goal of increasing campaign reach and driving conversions.

# M

**Markup type:** The code that instructs a browser or player on how to display the creative. In the Cadent platform, these markup types are supported:

- Display: JS tags and 1×1 image tags
- Video: 1×1 image tags
- Audio: 1×1 image tags
- Native display: JS tags and 1×1 image tags
- Native video: 1×1 image tags

**Metrics primary partner**: This determines whose data is the source of truth for a line item's KPI metrics. For example, if you set DCM at the metrics primary partner, the system will reference DCM data for your KPI metrics.

**Model score**: A model is a collection of mathematical functions that scores each bid request based on the likelihood that serving an impression will achieve the model's goal. Models are set at the ad group level.

# N

**Negative targeting**: This is the 'who not to target' list. Negative targeting is used to filter out irrelevant audiences and prevent your ads from showing to users who are unlikely to be interested.

# O

**Opt-out**: The action a consumer takes to exercise their right to stop a company from using their data, particularly for purposes like targeted advertising, analytics, or sharing with other entities. Within the Cadent Platform, this is a critical function for ensuring compliance with privacy regulations and respecting user choice.

# P

**Pixel:** A snippet of code placed on a website to track user activity. In the Cadent Platform, pixels are used to collect data for various purposes, including ad campaign targeting, performance measurement, and attribution.

**Positive targeting**: Positive targeting is the 'who to target' list. For example, if you sell running shoes, you might positively target users interested in sports, fitness, and marathons.

# S

**Source type, dataset:** Determines the primary characteristic of a dataset and how the data will be ingested. The form for creating a dataset will dynamically adjust based on your selection. For example, File upload, watch folder, pixel, and trade area are examples of source types.

# T

**Taxonomy, audience:** The hierarchical framework used to categorize and label audience segments based on shared attributes. Think of it as a family tree for audiences, where broad categories branch into more granular sub-categories. This provides a standardized common language for describing and selecting audiences within the platform.

**Third-party dataset**: Sometimes referred to as *Shared datasets*, they consist of information collected by an entity that does not have a direct relationship with the user. These datasets are typically aggregated from a variety of sources by data providers or data exchanges and are made available for purchase.

**Tracking tag**: A tracking tag is a piece of HTML or JS code that's placed on a webpage to track visitor activity for reporting and attribution purposes.

**Trade area:** dataset with sources tied to specific geographic areas

# U

**Universal tag**: A single JavaScript pixel placed in a shared code section, to automate the collection of data across every page of the site. A universal tag doesn't replace current pixels or static tags, it's additional functionality that increases mapping.

**Unknown gender**: Used in health audiences, unknown means a patient's gender wasn't captured.

# V

**VAST tag (Video Ad Serving Template)**: A standardized code (XML) that acts as a universal language between an ad server and a video player, telling the player what video ad to play, how to play it (skippable, length, etc.), where to find the media file, and how to track performance (impressions, clicks) across different devices and platforms, enabling seamless video advertising.

**VAST tag URL**: A VAST (Video Ad Serving Template) tag URL is a link that initiates the video ad-serving process. This URL tells the video player where to find the ad, what format it is, how long it is, and what actions to track (like views or clicks).

# W

**Watch folder** : Dataset type for uploading files using an sFTP process.

# 4. Release notes

## 4.1. 2026 release notes

Release notes provide updates on new features and changes that occur on the Cadent Platform as part of a given release. We make new release notes available as soon as a new release occurs.

# April 6, 2026

## New bulk action: Update Optimization settings for multiple Ad Groups

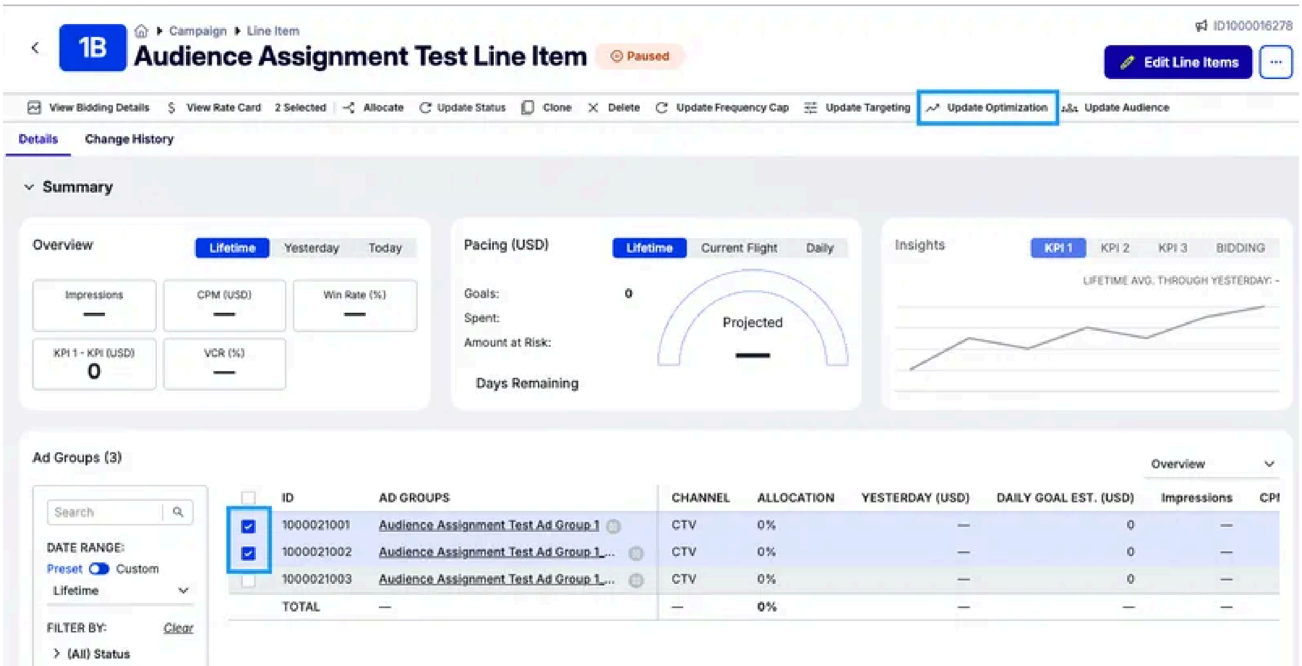
You can now apply optimization setting changes to multiple ad groups simultaneously, streamlining your campaign management workflow and ensuring consistency across your ad groups. Previously, updating these settings required editing each ad group one by one.

You'll find this bulk update option on the following pages:

- **Campaigns Details**: For the list of line items appearing there
- **Line Item Listing**: On the Campaigns page
- **Line Item Details Page**: For the list of ad groups appearing there

To bulk update ad group optimization:

1. Select one or more ad groups. Note that ad groups must be associated with the same advertiser to perform this bulk update.
2. Click **Update Optimization** to open the **Optimization** panel.
3. Click **Save** to apply your changes across all selected items.

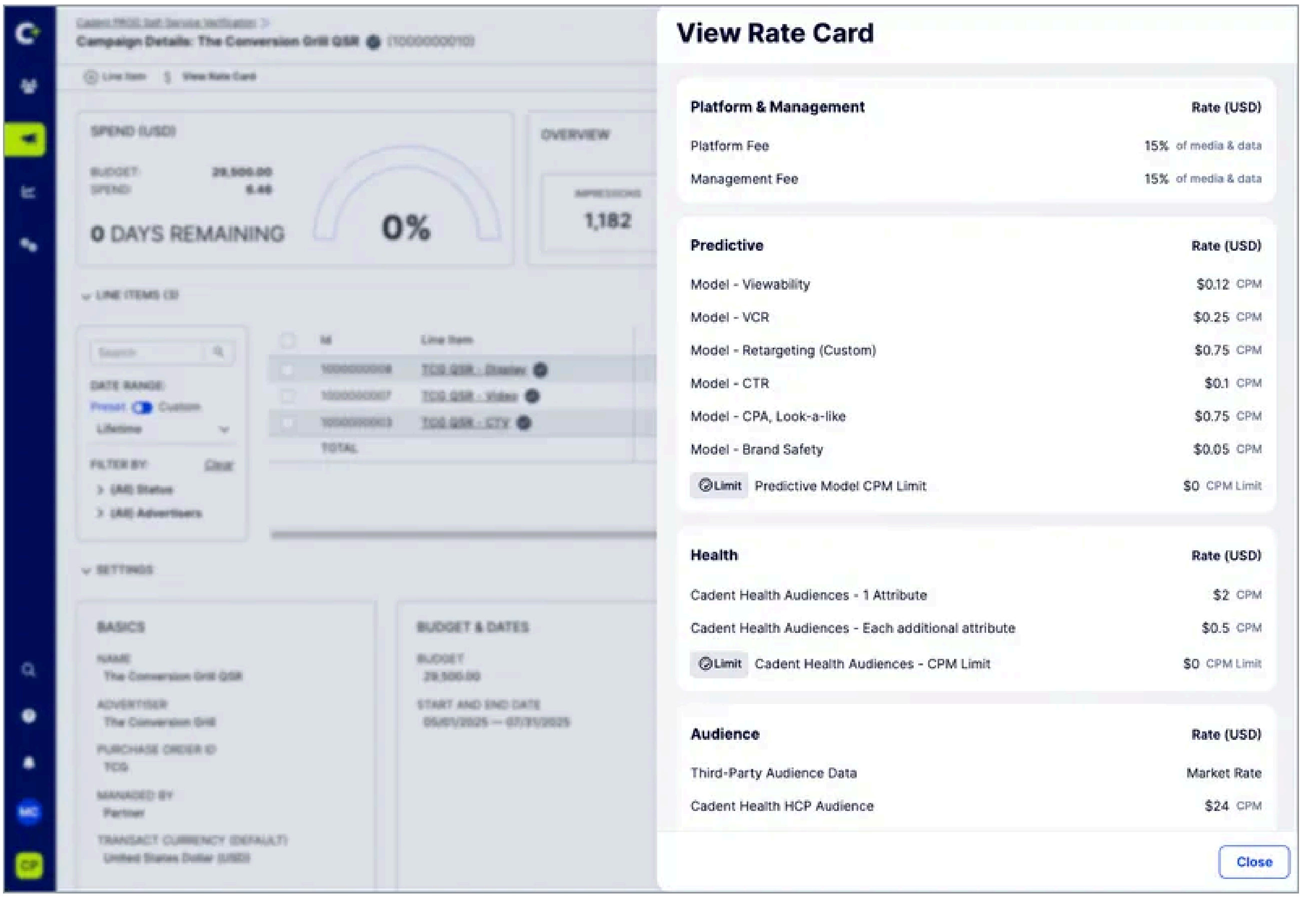



## Easily reference your pricing with Rate Card Viewer

We're excited to announce the launch of the new Rate Card Viewer in Ad Manager. This new view provides quick, transparent access to your Rate Card, reducing time spent looking for your rates.

To access the Rate Card, click **View Rate Card** in one of the following screens:

- Campaign Details
- Line Item Details
- Ad Group Details



Rate card viewer

# April 1, 2026

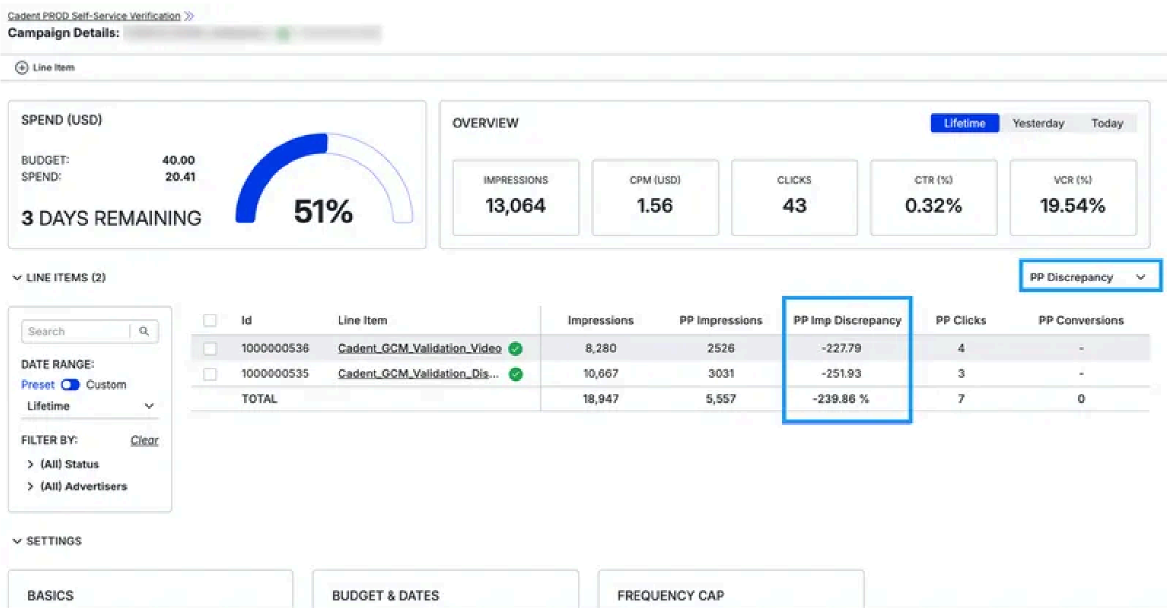
# Ad Manager release notes

## Resolved issue: Primary Partner Impression Discrepancy

The methodology used for calculating the difference between Cadent-tracked impressions and Primary Partner impressions (e.g., those tracked by an ad server like CM360) was displaying inaccurate numbers. We've resolved this issue, so now the **PP Imp Discrepancy** column is reflecting accurate numbers.

To view the PP Imp Discrepancy column:

1. Navigate to the **Campaign Details** or **Line Item Details** page.
2. Select **PP Discrepancy** from the view selector.



# March 23, 2026

## Ad Manager release notes

### Report filters for Ad Hoc Reporting have been simplified

When creating a new report, you can now filter reports only by agency. No other filters are required. This makes it possible to produce more comprehensive reports than were previously possible. **Learn more.**

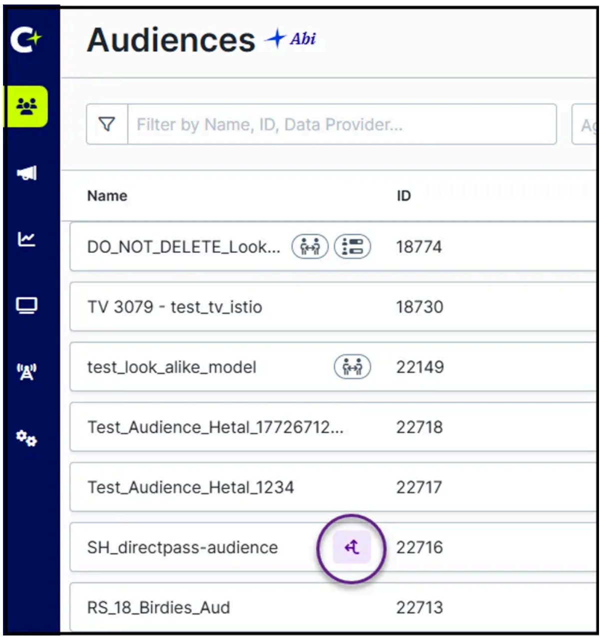

## Audience Manager release notes

### DirectPass icons added in Audience Manager

A new DirectPass icon now displays alongside DirectPass datasets in Audience Manager making them easier to spot. DirectPass uses a specialized dataset onboarding and deployment workflow that allows the direct ingestion and deployment of raw device identifiers (such as Device IDs and IP addresses) without first resolving them to Cadent's household graph. DirectPass datasets don't include the household level information.

DirectPass icons display in the following locations in Audience Manager:

- Audiences page
- Deployments page
- New Audience, My Datasets tab
- New Audience, Marketplace Datasets tab
- New Audience, Shared with Me tab


Audiences
Abi
Filter by Name, ID, Data Provider...
Name
ID
DO_NOT_DELETE_Look...
18774
TV 3079 - test_tv_istio
18730
test_look_alike_model
22149
Test_Audience_Hetal_17726712...
22718
Test_Audience_Hetal_1234
22717
SH_directpass-audience
22716
RS_18_Birdies_Aud
22713

DirectPass icon on the Audiences page

# Audience tags display on the Audiences page

You can now see audience tags with audiences on the Audiences page. Tags provide the ability to create categories of audiences that share commonality. Although the tags do not display by default, you can add them to the page using the  icon on the Audiences page.

# The % Reach indicator on the New Audience page has been updated

On the**Total Reach** section of the New Audience page, the **% Reach** column has been renamed **Percentage Change** to improve clarity. This column displays the percentage change in total reach as you configure a new audience. It is updated in real time when you make changes to the audience you are building. Learn more

# March 18, 2026

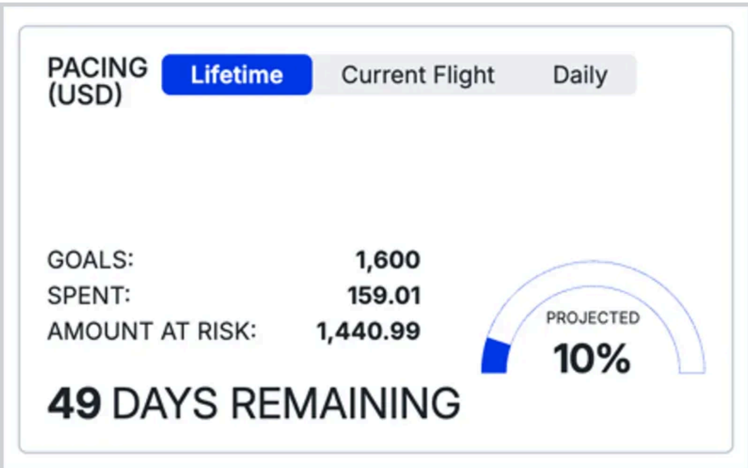
## Ad Manager release notes

### New 'Lifetime' view for line item pacing

We've added a new **Lifetime** timeframe to the line item Pacing tile. This allows you to see pacing metrics across all of a line item's flights, giving you a more holistic view of performance and helping you better understand and analyze the performance of your long-term campaigns.

Here's a breakdown of the metrics you'll see in this new view:

| Metric | Description |
|---|---|
| **Goal** | This is the overall goal for the line item, depending on how your line item is pacing:<br>• If pacing toward impressions, the Goal reflects Flight Impressions.<br>• If pacing toward spend, the Goal reflects Flight Spend Cap. |
| **Spent** | The total amount spent through yesterday. |
| **Amount at Risk** | This shows the portion of the goal that's projected to be missed, giving you an at-a-glance view of pacing performance.<br>Amount at Risk is calculated using this formula:<br>(100% - Projected %) * Goal = Amount at Risk |
| **Days Remaining** | The number of days left in the current flight, not including today. |




## Simplified way to disable campaigns, line items, and ad groups

We've streamlined the process for disabling items in your account, making it faster and more intuitive to manage your campaigns.

### Disabling campaigns and line items

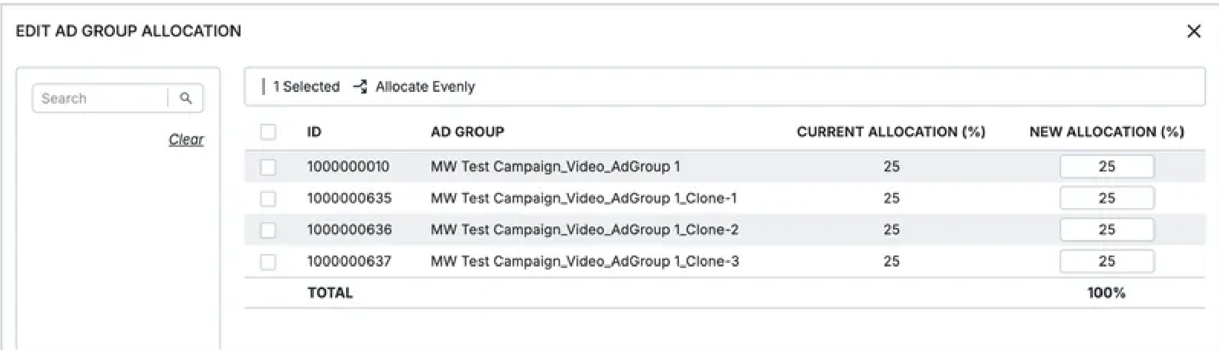
You can now directly set the status of an entire Campaign or Line Item to **Disabled** without changing its underlying budget setup. Previously, you had to go into each Ad Group individually to disable the allocation. This change makes pausing your campaigns a much quicker, one-step process.

### Disabling ad groups

You can set an individual Ad Group to **Disabled**, but only if the parent Line Item's active budget allocation already totals 100%.

To check the budget allocation for a Line Item, simply follow these steps:

1. Go to the **Line Item Details** screen.
2. Select the **Ad Group** and click **Allocate**. This opens the Edit Ad Group Allocation panel.
3. Review the budget allocation details, and if necessary, make edits to bring the total allocation to 100%.




## Save time with bulk pixel uploads

We're excited to announce a new feature that will make your workflow significantly more efficient. You can now create pixels in bulk—including universal tags, activities, and action activities—directly into Ad Manager, saving you from the manual effort of creating them one by one.

### How to Upload Pixels in Bulk

Follow these steps to get started:

1. Navigate to the **Pixels** screen from the main menu.
2. Click the **+Pixels** button and select the **Bulk** option. This will open the Add Pixels in Bulk panel.

3. Select the **Advertiser** you want to associate the pixels with.
4. Download the **sample file** provided. This template ensures your data is formatted correctly for a successful upload. Add your pixel information to this file and save it to your computer. If you're trying to make any new activities for an existing Universal Tag, you should download a new template from the panel to ensure your existing Universal Tags are pre-populated in the dropdown list on the Activities tab of the template.
5. Drag and drop your completed file into the upload area, or click to browse for it on your computer.
6. Click **Add**.

Once the upload is complete, you will be automatically returned to the main Pixels screen where you'll see a success message confirming your new pixels have been added.

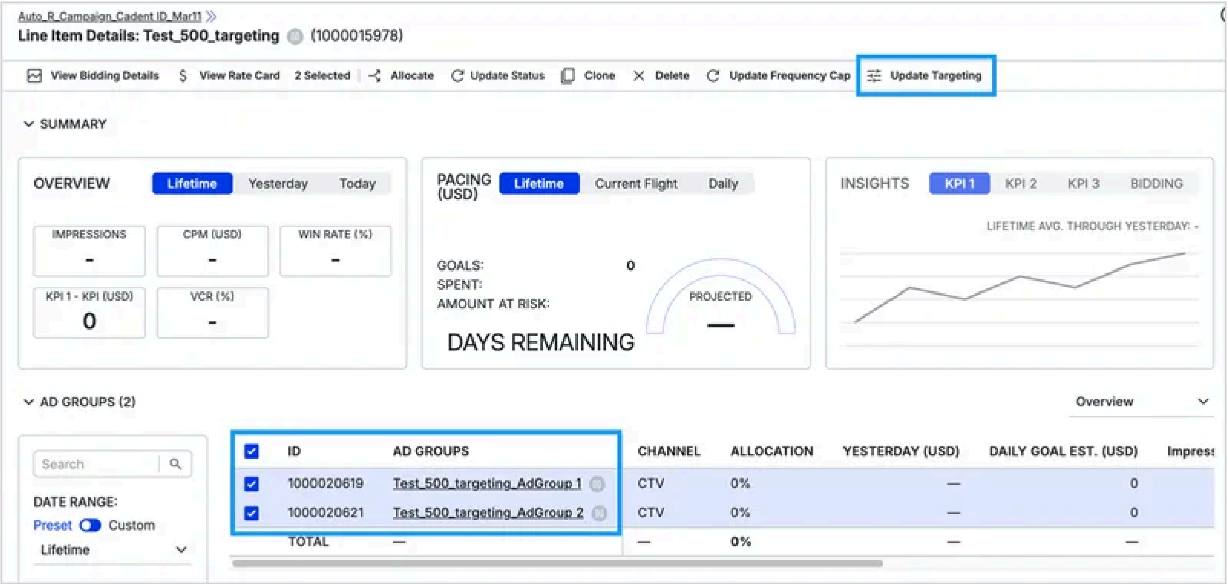
# Streamline your targeting with bulk actions

You can now update **Custom Categories**, **Supply Categories**, and **Network & Channel** targeting for multiple ad groups at the same time.

> **Key Details to Remember**
>
> - **Custom Categories:** You can select from pre-made custom categories during a bulk update. New categories must be created beforehand.
> - **Network & Channel:** This targeting option is specifically for CTV.
> - **Supply Categories:** These are Jounce-defined supply categories.

## How it works:

1. Navigate to the Line Items Details screen and select the ad group(s) you want to update, and then click **Update Targeting**. This opens the Add Targeting panel.



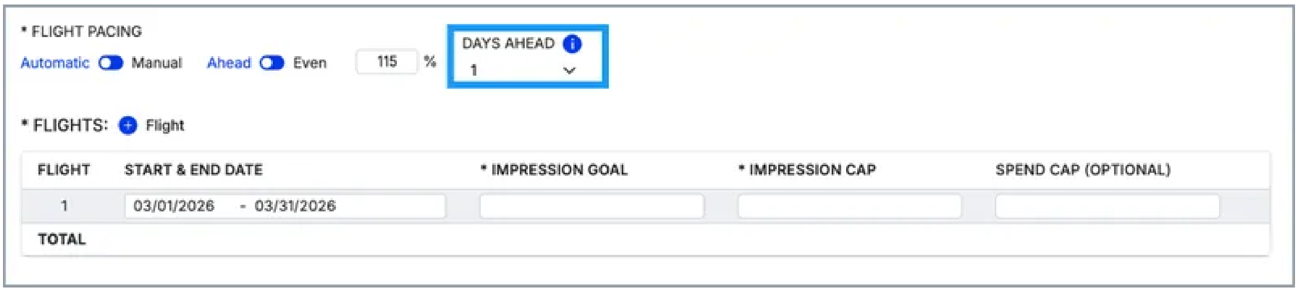

2. In the **Add Targeting** panel, make your new targeting selections and close the panel.
3. You're all set! The new targeting options will be reflected in the **Ad Group Details** screen for each Ad Group you updated.

# February 19, 2026

# Ad Manager release notes

## Line item update: Days Ahead setting

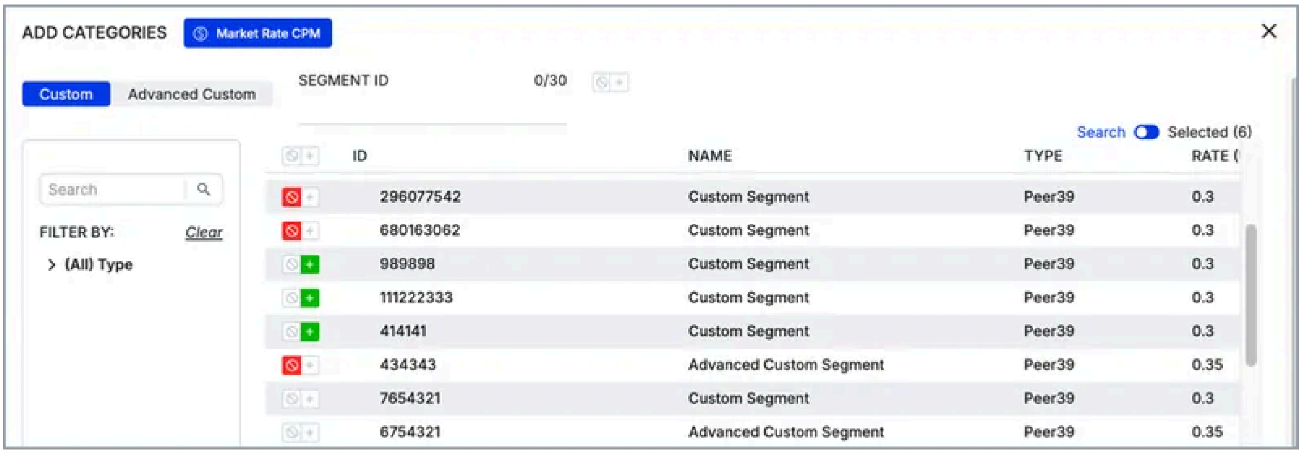
You now have the ability to indicate whether a line item should aim to deliver in full a certain numbers of days prior to the end date.




## Targeting update: Categories targeting

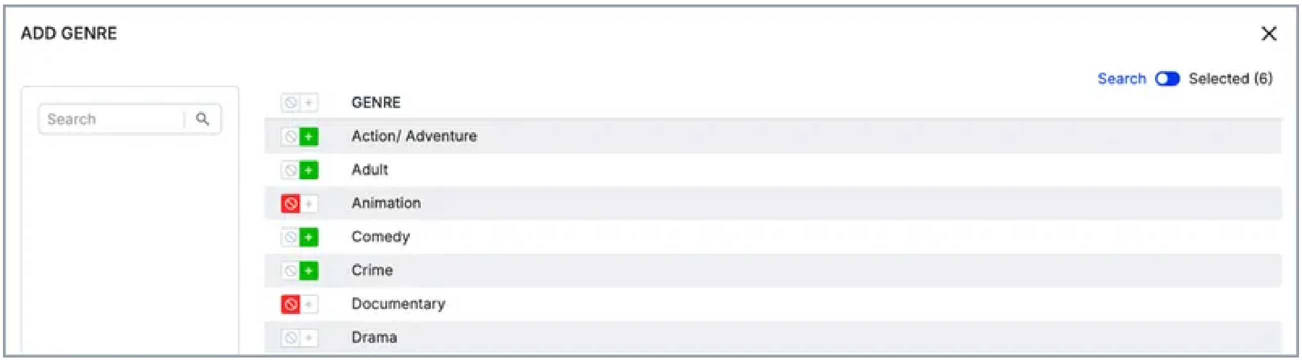
You can now target IAB or Peer39 content categories, including custom and advanced Peer39 segment creation and selection, to ensure your ads appear on relevant content.

You can target specific IAB categories or Peer39 segments, or you can exclude categories to prevent your ads from appearing on undesirable content.



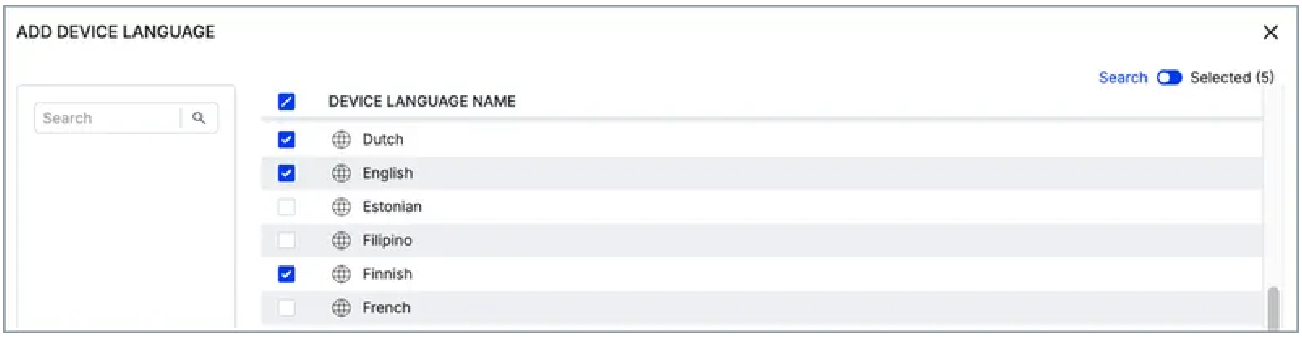

## Targeting update: Genre targeting

Genre targeting allows you to align your campaigns with specific types of CTV video content. This feature enables you to target or exclude content based on the genre—for example, Comedy, Sports, Drama, Documentaries, and True Crime. You can either include specific genres to target or exclude genres you want to avoid.




## Targeting update: Device Language targeting

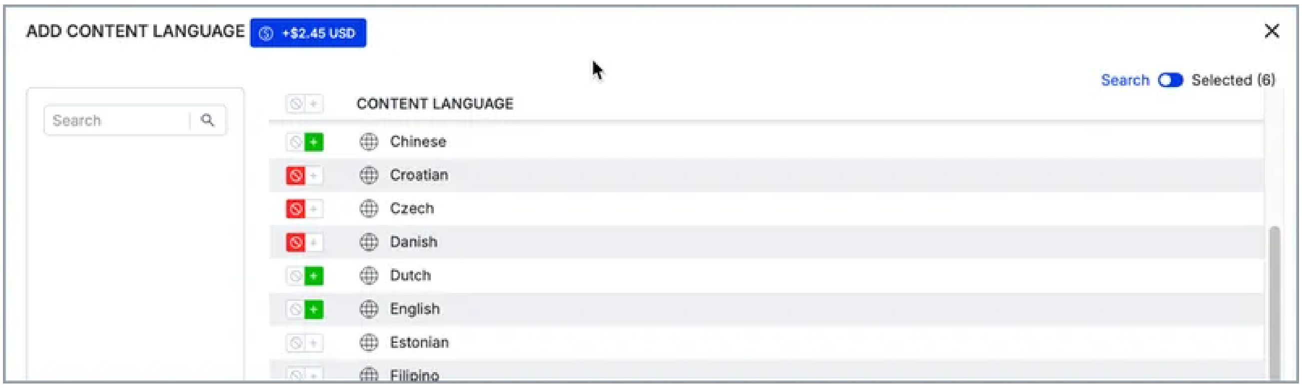
Device Language targeting lets you deliver ads specifically to users whose devices are set to a particular language. It's a straightforward way to ensure your message is relevant and understood by your target audience, especially in multilingual regions or global campaigns.




## Targeting update: Content Language targeting

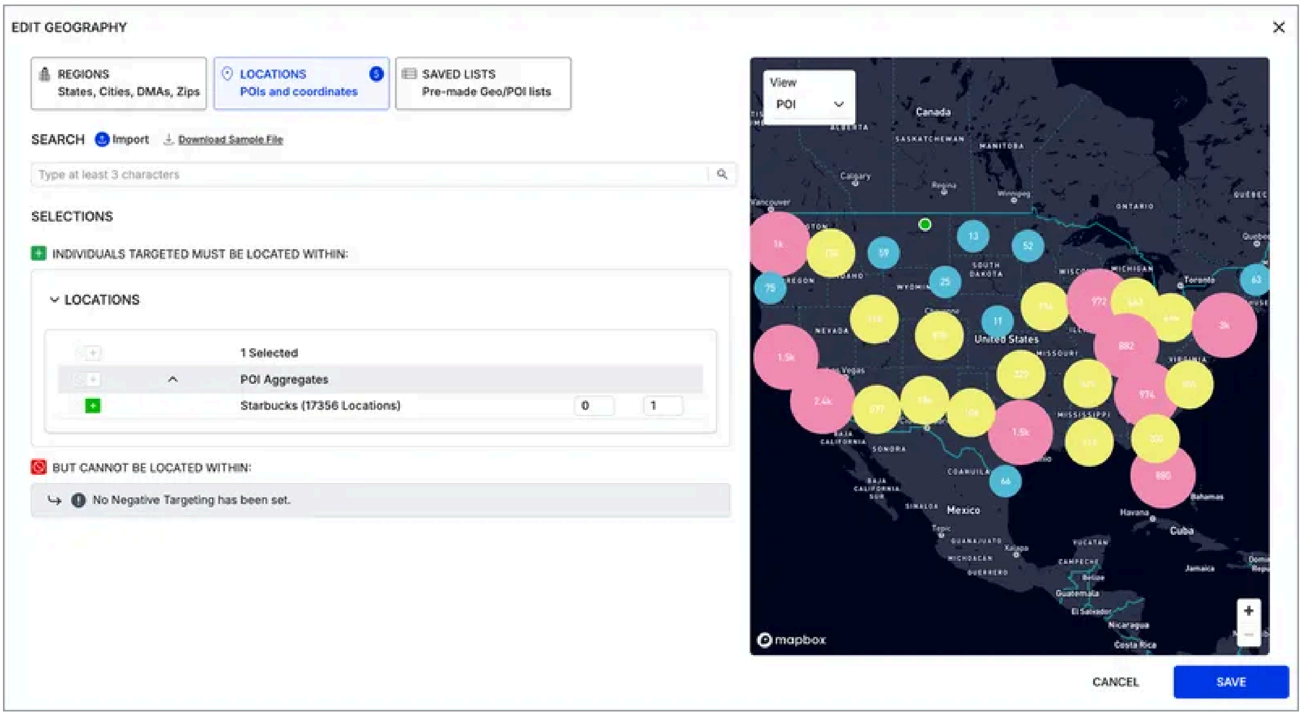
This method allows you to target viewers based on the primary language of the CTV content itself. For example, you can choose to have your ads appear only during Spanish-language programs, regardless of the viewer's device settings.

You can choose to either target or exclude language.



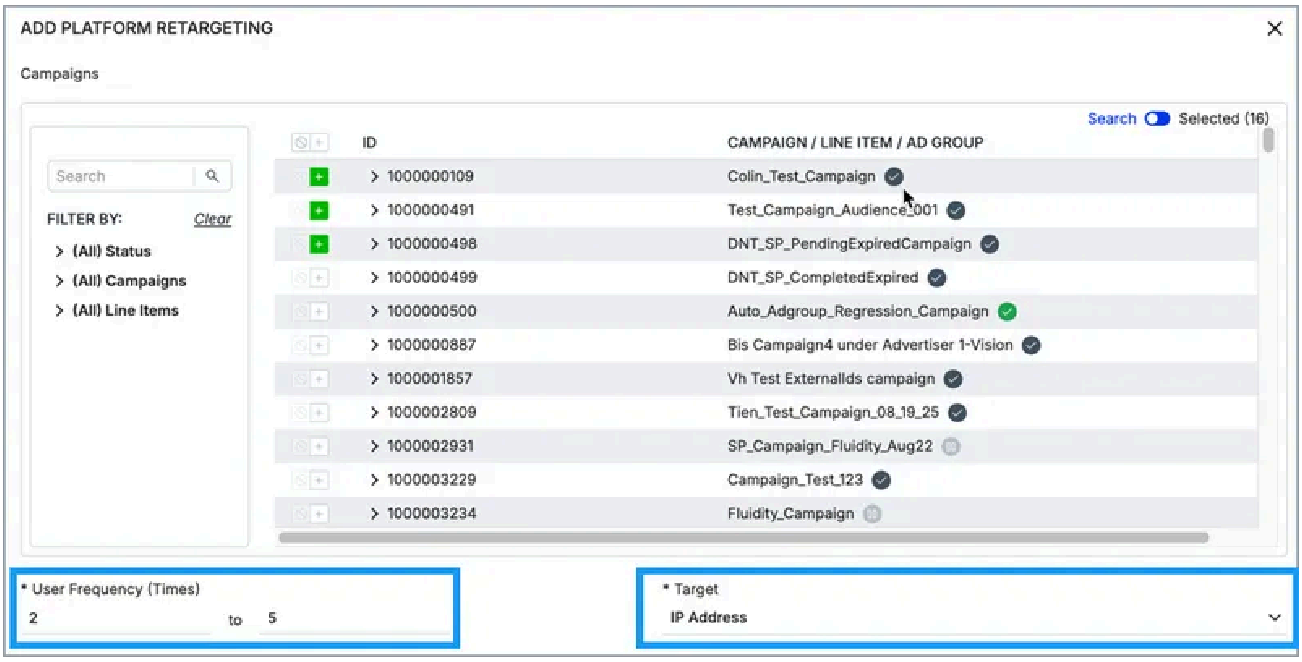

## Targeting update: Geo POI targeting

You can target POIs via Geo targeting, which are presented to the user as an aggregate vs single point selection. For example, in one click you can target 4,000 Starbucks vs. having to select each one at a time.




## Targeting update: Platform retargeting

Platform retargeting allows you to target users who have previously exposed to your campaigns.



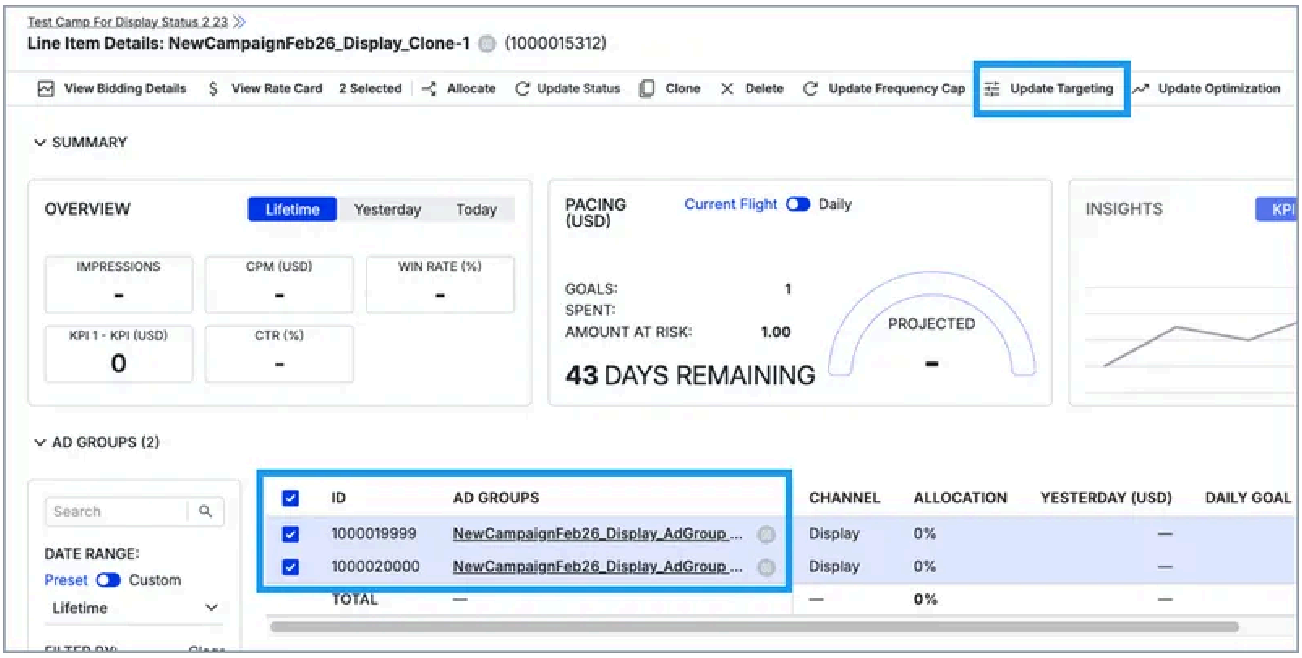

- You can choose to either positively target (include) or negatively target (suppress) the selected audience.
- User Frequency:This allows you to set a minimum and maximum range for how many times a person has been served your ad. For example, if you set a minimum of 2 and a maximum of 5, the system will only target users who have seen the ad at least 2 times but no more than 5 times.
- Target: This is the identifier used to count the frequency. You can select to track users by their IP Address, a browser Cookie, or All (which uses both methods).

## Targeting update: Bulk actions

You can now select multiple ad groups in the line item details view to apply bulk targeting actions (see the screenshot below). The selections you make will override the previous selections.

The targeting options you can bulk update are:

- App/Sites list
- Packages
- Geography
- Deals
- Keywords




# Reporting release notes

## Fewer filters are required when creating an ad hoc report

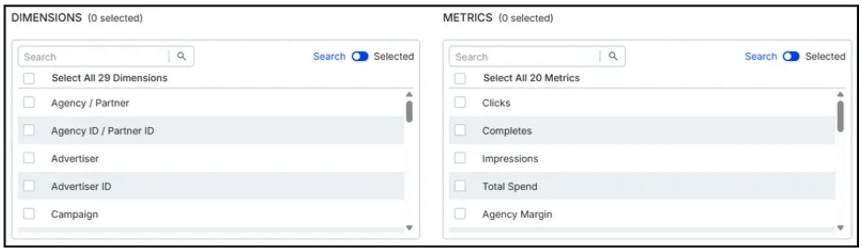
We have reduced the number of filters you need to apply when creating an Ad Hoc report. Now, you are only required to select an agency. This makes it possible to create broader reports than were possible in the past. Learn more about **Creating ad hoc reports**.


## New reporting dimension added to Performance Insights templates

To provide you with a way to see more detail on your creatives in reports, a new reporting dimension, **Creative Type**, has been added. A creative type defines how a user interacts with a digital ad. For example, **video**, **display**, and **banner** are creative types that apply to online ads. The creative type dimension is being made available on the following report templates:

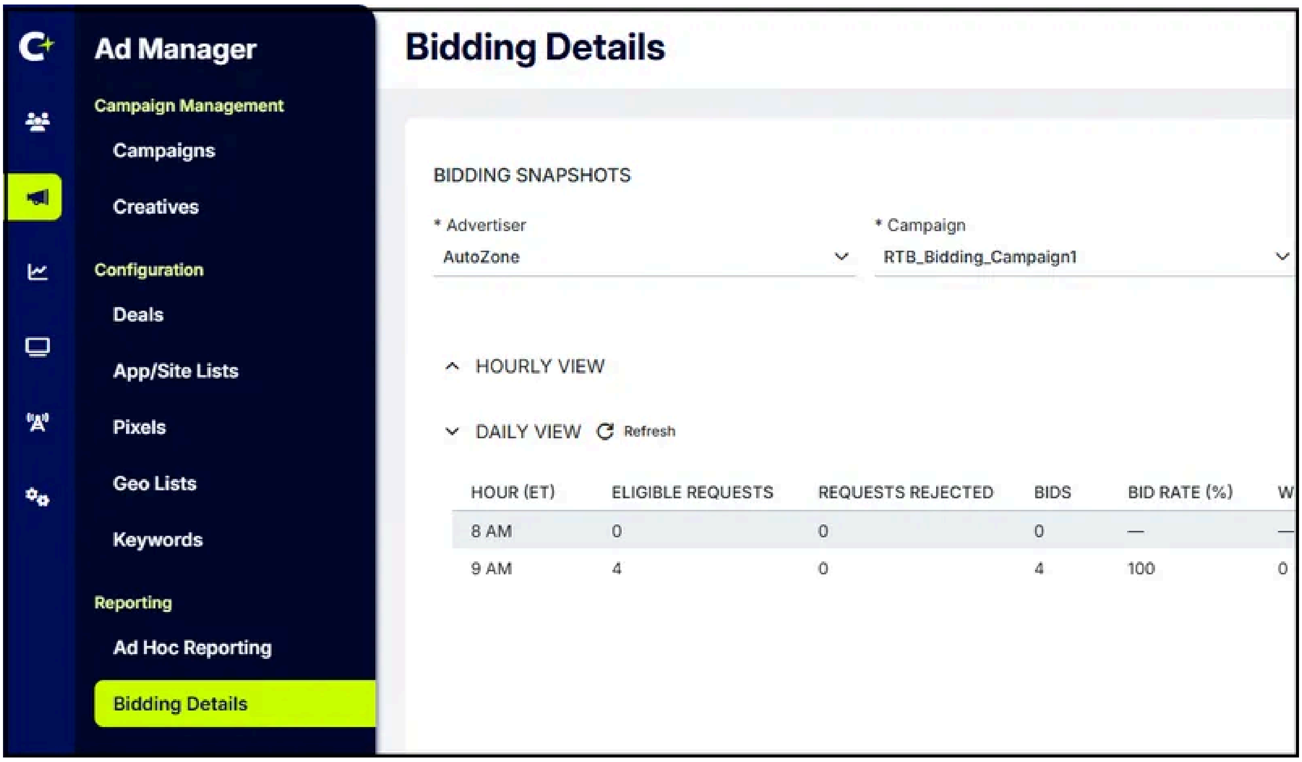
- Campaign metrics
- CTV metrics
- Video metrics
- Geo targeting metrics
- Reach and frequency
- HCP metrics

Learn more about **Performance insights templates**.



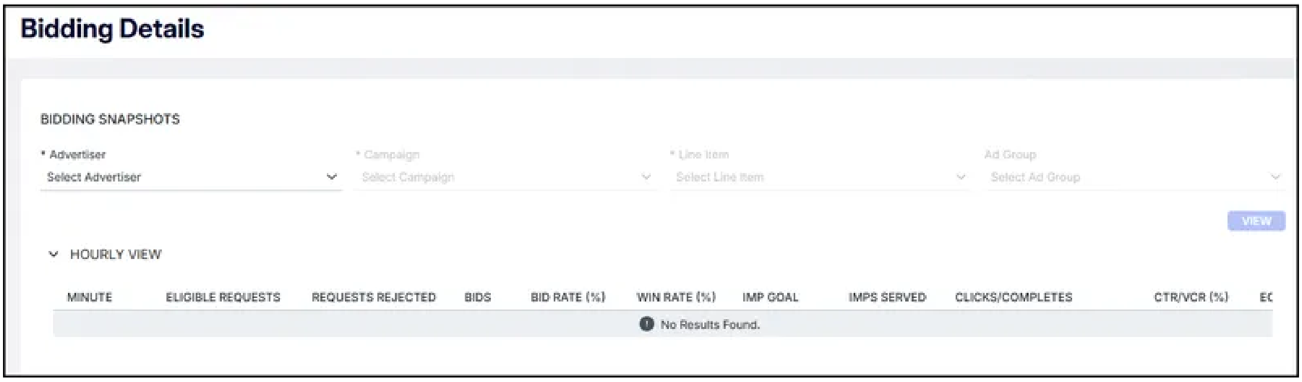

# Bidding Snapshot renamed Bidding Details

When you access the Bidding Snapshot report, you will notice that it has been renamed **Bidding Details**. The new name displays on the left-side navigation bar and on the top of the page in Ad Manager. It is the same report as before but with two new additions described below.




## Bidding Details report adds an hourly view

In addition to the Daily and Troubleshooting views, you now have the option to select an **Hourly View** of line items and ad group details. The hourly view displays the current hour's activity, and it can be refreshed to show the latest updates.




## New fields display on Bidding Details report

The following new fields have been added to the Bidding Details report results for hourly and daily report results:

- **Spend Goal** - The monetary target an advertiser or media buyer aims to reach within the timeframe of a line item or ad group.
- **Total Spend** - The amount of money your campaign or line item has spent from the budget to win impressions.

# February 4, 2026

# Audience Manager release notes

## DirectPass Data Ingestion

DirectPass uses a specialized dataset onboarding type and deployment workflow that allows the direct ingestion and deployment of raw device identifiers, such as Device IDs and IP addresses, without first resolving them to Cadent's household graph. DirectPass datasets don't include the household level information.

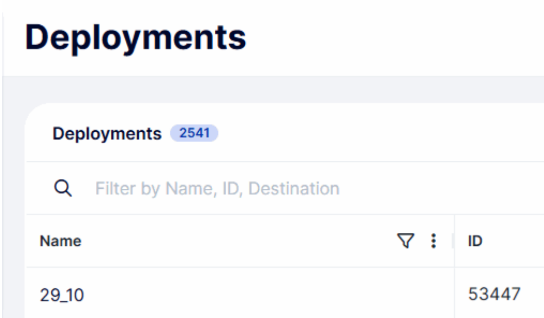
DirectPass enables specialized workflows that require the use of raw, unaltered identifiers. You can use DirectPass under the following conditions:

- Targeting for regions outside the United States, such as Canadian segments for use in AdManager.
- Passing raw identifiers directly to destination partners that have their own identity resolution systems.

**Note:** You must have DirectPass enabled for your organization to perform this type of data onboarding. If interested, contact your Account Manager.

## ID filter added to Deployments page

The filter on the Deployments page has added the option to search by Deployment ID. [Deployments page details]



## January 23, 2026

# Health Audience release note

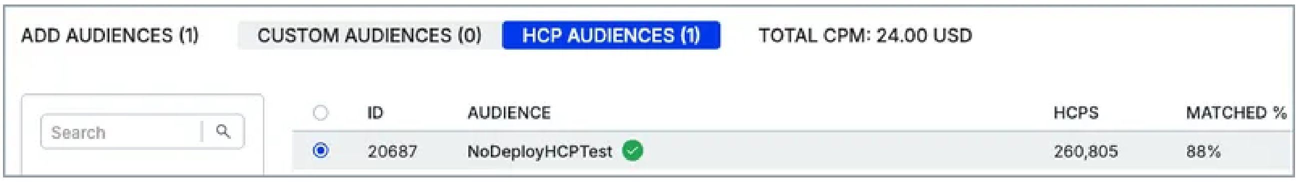
## Assign an HCP audience to an ad group

**What's an HCP audience?**

A Healthcare Professional (HCP) audience is a target group consisting of healthcare professionals such as doctors, nurses, pharmacists, and dentists. When you build and save an HCP audience in the [Health Audience builder](), it's automatically available for assignment in the UI—as long as the audience and ad group are both associated with the same advertiser.

**How to assign an HCP to an ad group**

You can now assign an HCP audience to your ad group during the ad group setup. See [Add an ad group]() for instructions.




Audience assignment screen in Ad Manager

# 4.2. 2025 Ad Manager release notes

This folder contains release notes from 2025.

**Dec 2, 2025 release notes**

**Sept 8, 2025 release notes**

**Aug 19, 2025 release notes**

# 4.2.1. Dec 2, 2025 release notes

## Multiple transact currencies supported

Ad Manager now supports multiple transact currency types. When **adding a campaign**, you can select from the following:

- AUD
- CAD
- CHF
- CNY
- EUR
- GBP
- JPY
- MXN
- SEK
- USD

**Note:** The currency type can't be changed once the campaign goes live.

## DoubleVerify ABS targeting

DoubleVerify Authentic Brand Suitability (ABS) is a solution that empowers advertisers to protect their brand reputation and enhance campaign performance by ensuring ads are delivered in high-quality, brand-safe, and fraud-free environments. DoubleVerify ABS is integrated with Cadent Ad Manager as a key tool for ensuring inventory quality, providing measurement for viewability, and filtering for invalid traffic. Custom DoubleVerify ABS segments are generated on the DoubleVerify platform.

To target a custom DoubleVerify ABS segment, enter the ABS ID when **adding an ad group**.

## Video settings targeting

Use the Video Settings targeting to define where your video ad will run on the page. Think of it as choosing the specific type of movie theater you want your ad to run in—a big screen with surround sound versus a small screen in the lobby.

Supported placement options are: In-stream, Accompanying content, Interstitial, No content/standalone, and In-banner.

Available channels: Video and CTV

# 4.2.2. Sept 8, 2025 release notes

## Preview actual render dimensions for a creative

Sometimes trafficking requirements are different than an actual creative size, so we've added the ability to preview a creative using the actual render dimensions.

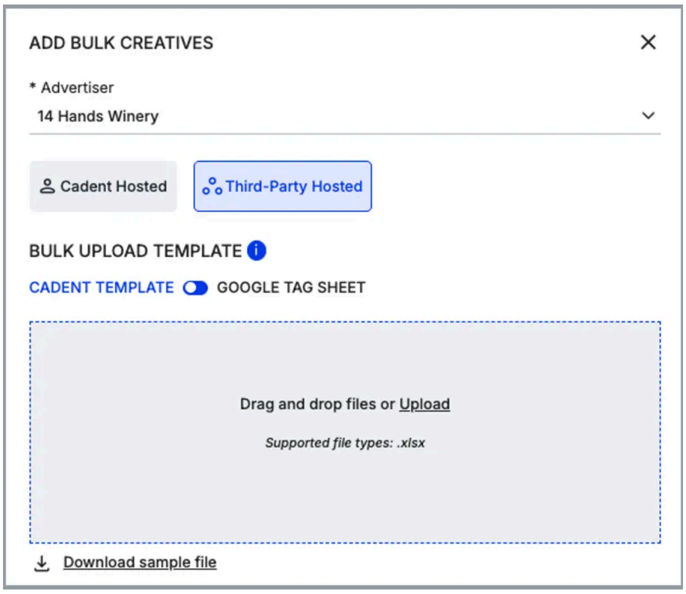
For example: Company A has a creative that renders at 375×150, but they have to bid at 320×50.

To change the actual render dimensions:

1. Navigate to the Creative Library.
2. Search for and click the creative you want to preview. This opens the Edit Creative Information slide-out.
3. Click **Additional Preview Settings**.
4. Enter the **Actual Render Dimensions** in pixels.
5. Click **Apply**. The image preview will resize to the dimensions you entered.

# 4.2.3. Aug 19, 2025 release notes

## Bulk upload third-party hosted creatives




Cadent Ad Manager now supports bulk upload for third-party hosted creatives.

- Download and populate Cadent's sample file, or use a Google Tag Sheet.
- Uploads are saved in a draft folder until you approve them, giving you an opportunity to make final adjustments.
- For upload instructions:
  - Bulk upload with a 3P Cadent template
  - Bulk upload 3P creatives with a Google tag sheet
  - Clearing errors and editing draft creatives

# 4.3. 2025 Audience Manager release notes

Here you can access the Audience Manager releases from 2025. Releases prior to June are no longer available:

**Dec 15, 2025 release notes**

**Dec 8, 2025 release notes**

**Oct 14, 2025 release notes**

**Sept 25, 2025 release notes**

**July 1, 2025 release notes**

**June  17, 2025 release notes**

# 4.3.1. Dec 15, 2025 release notes

## Viewer Graph update

We've just completed an update to the Cadent Viewer Graph. This enhancement improves the graph's overall accuracy and addressability through the inclusion of some new data sources; however, you should not expect to see any dramatic changes with the Audience Manager outputs sent to SegmentHub or other destinations.

Following are a few key points to call out:

- **Graph identity agreement:** The graph updates now show a small re-assignment of IDs based on new data sources and latest graph models or truth sets. For both device ID and household assignments, the expected re-assignment is typically 9-10%, which is not out of line with a standard week-over-week churn rate we may see with the graph. ~90% of IDs will remain in this graph update with the same household assignments.
- **Device ID volume**: Total devices in the graph will also see a similar increase in volume, including MAIDs and CTV IDs, which are up from ~1.2 Billion to ~1.7 Billion. This volume is expected to similarly reduce over time, landing somewhere in the middle of the range.
- **Activation graph**: Activation Graph is a slimmed down version of the graph leveraged primarily for FreeWheel deployments to alleviate downstream data processing issues in FreeWheel. The updated Activation Graph will continue to maintain the same ~500 million devices cap and will see similar numbers with regards to graph churn / agreement (~10% churn).

# 4.3.2. Dec 8, 2025 release notes

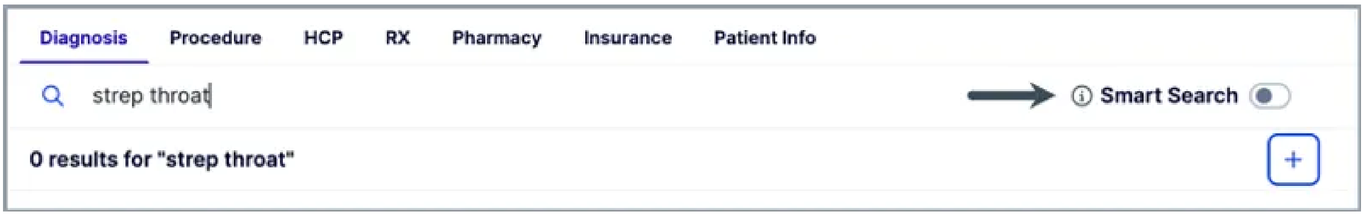
## Health Audiences: AI-powered Smart Search

When you search for Diagnosis or Procedure attribute items, you can now enable AI-powered Smart Search to also find related attribute items.

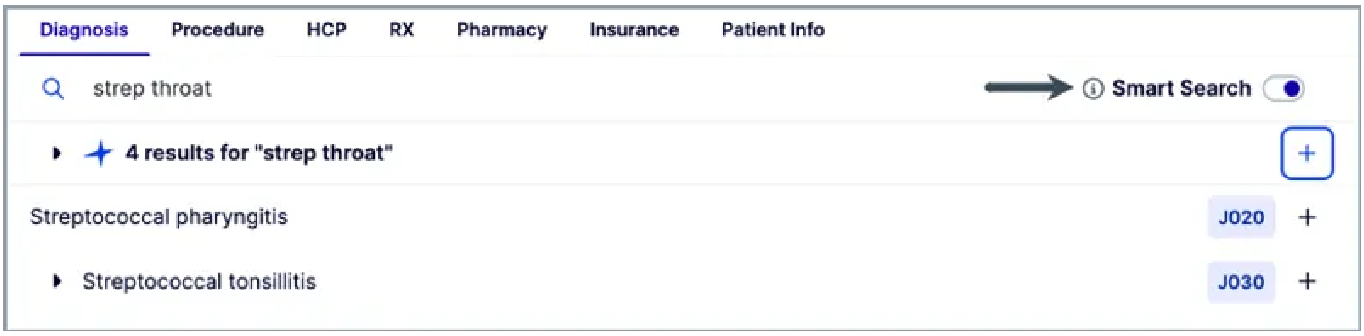
For example, when you search for "strep throat" *without* Smart Search, you get 0 results. When you search for "step throat" *with* Smart Search, you get related results. See examples below.

Key points:

- Smart Search is only available for Diagnosis and Procedure attributes.
- Smart Search is off by default.
- When Smart Search is off, results populate automatically.
- When Smart Search is on, you'll enter a search term and press Return to view results.




Results withouth Smart Search



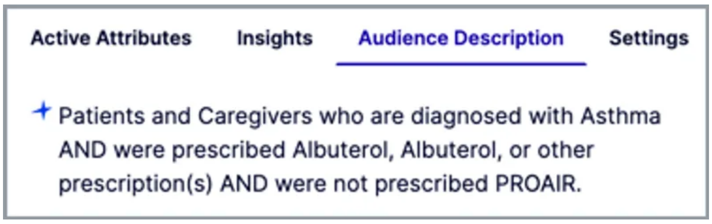

Results with Smart Search

## Health Audiences: Audience Description

When you build a health audience, the Audience Description summarizes the attributes items you've selected (see example below). To populate the Audience Description, select your attribute items and then click Calculate Audience.

The Audience Description uses these AND-OR statements for groups and exclusions:

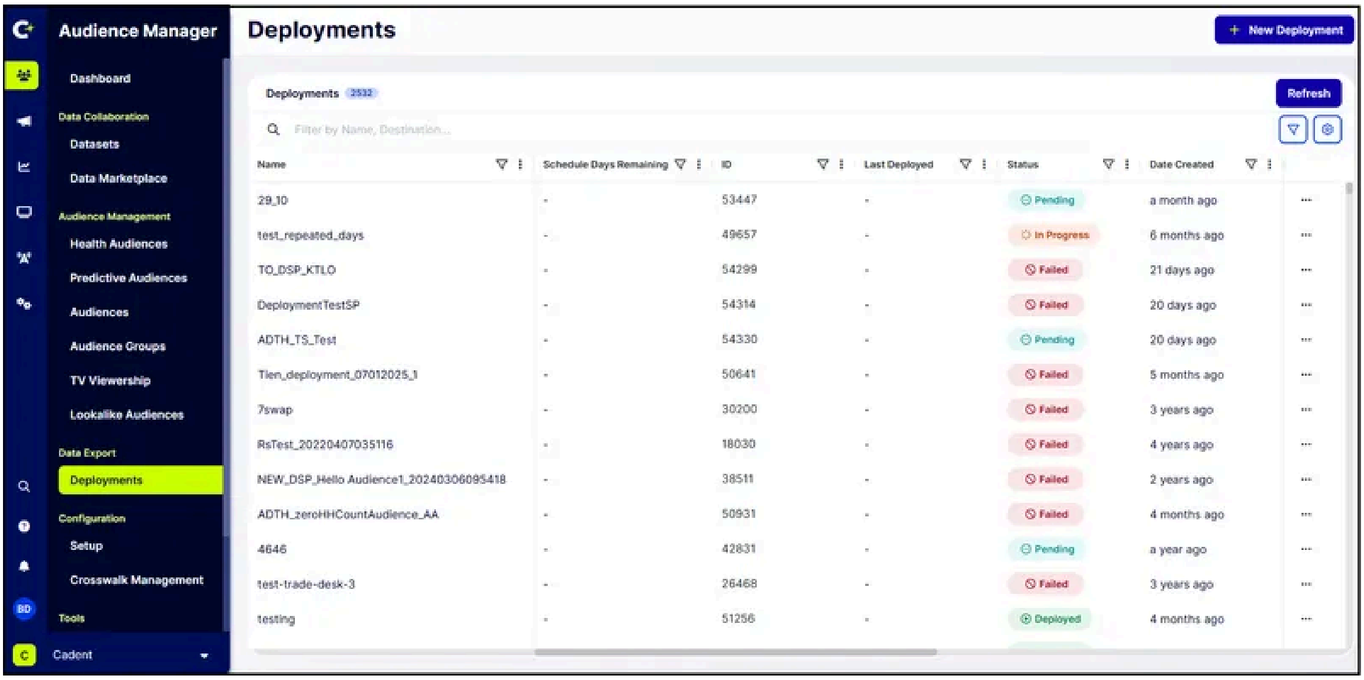
- Patient Info: AND logic
- Within groups: OR logic
- Between groups: AND logic
- Exclusions: AND are not/were not logic.




Sample audience description

# New Deployments list page

The Deployments list page has been updated to be more flexible and to improve your experience when working with deployments. You can sort, filter, and rearrange content on the list table. Precisely define deployments that display on the page to fit your individual workflow, and the settings are saved when you log in the next time. Return to the default page setting at any time. [Learn more.]



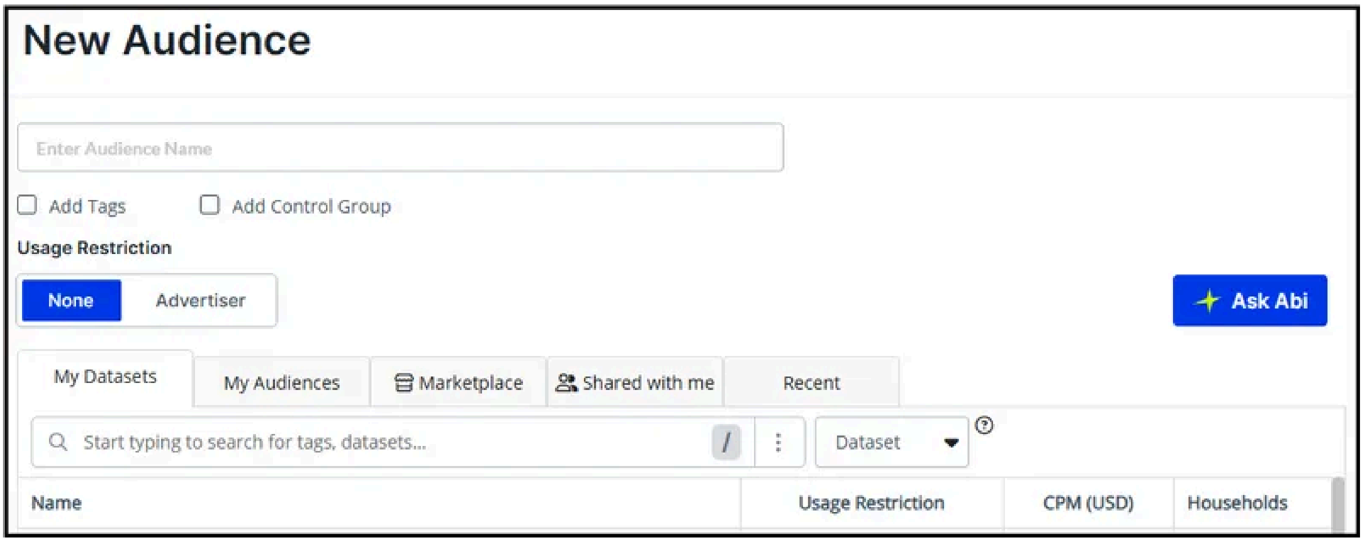

# AI Search for Audience Builder

The new AI search agent (Ask Abi) in Audience Builder makes it much easier to find the optimal segments for your audience. You enter a query and Abi provides a list of segments that match. For example, "List luxury watch shopper segments", or "Find segments I can use for golf enthusiasts". The agent understands and translates user prompts into relevant segments or audiences, which you have the option to apply.

You can ask the agent to filter your segment results by a specific data provider, CPM, or reach count. For example, you can request it to "list luxury watcher segments from Acxiom, or show shopper segments that are under $1 CPM."

The AI search agent adheres to existing platform rules regarding sensitive categories, state-law restrictions, dataset restrictions, and permissions. **Learn more.**

**Note:** The AI search agent can be toggled on or off at the user, account, and affiliate levels.




# Blockgraph for Scheduled Deployments

Previously, the Blockgraph destination only supported one-time deployments. You can now schedule Blockgraph deployments to refresh segment data on a recurring cadence.

# 4.3.3. Oct 14, 2025 release notes

The following new feature has been added as the result of the latest release.

## Deployments API

The Deployments API allows you to programmatically manage audience and dataset deployment workflows. It streamlines the data onboarding processes, fosters deeper integration, and enables automation for our partners. The Deployments API follows the design and behavior of Cadent's established API Taxonomy Guidelines.

The deployments API provides the following options:

- Retrieve a comprehensive list of supported delivery partners
- Access crosswalk details associated with specific partners
- Create new deployments for both audiences and datasets, supporting both immediate ("run-now") and scheduled deployments
- Monitor the status of existing deployments
- Modify existing deployment schedules

# 4.3.4. Sept 25, 2025 release notes

The following new features have been introduced in this release.

## Refences to 4Info replaced with Cadent

As part of our ongoing effort to unify our brand, references to **4INFO** have been updated to **Cadent**.

This is a name and logo change only, which reflects our commitment to providing a cohesive and consistent brand experience. The following table indicates where the changes appear in Audience Manager:

| Area of Change | Old Reference | New Reference |
|---|---|---|
| SFTP | Connections named **4Info** | **Cadent** |
| Marketplace Logos | logos with **4Info** | **Cadent** |
| Deployments | Destinations named **4Info** | **Cadent** |

While the name and logos have been updated, be assured that the functionality and your workflows remain the same, including SFTP directory structures. This is purely a branding update to ensure all elements of our platform are aligned with the Cadent brand.

If you have any questions, contact support@cadent.app

## Vizio added as a data deployment partner

Vizio is now available as a data deployment partner. Vizio's data must be refreshed weekly. This is different from other data partners who have less strict data management requirements. Note the following requirements when working with Vizio:

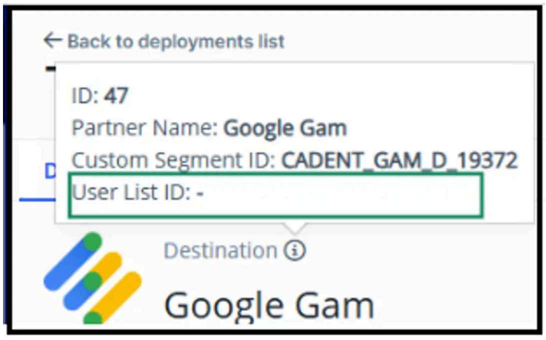
- If you are deploying Vizio data, you must create a scheduled deployment so that the data is refreshed on a weekly basis.
- If you select Blockgraph as the destination for a one-time deployment using Vizio data, the deployment is only valid for seven days. It must be redeployed every seven days for as long as it is needed.

# 4.3.5. July 1, 2025 release notes

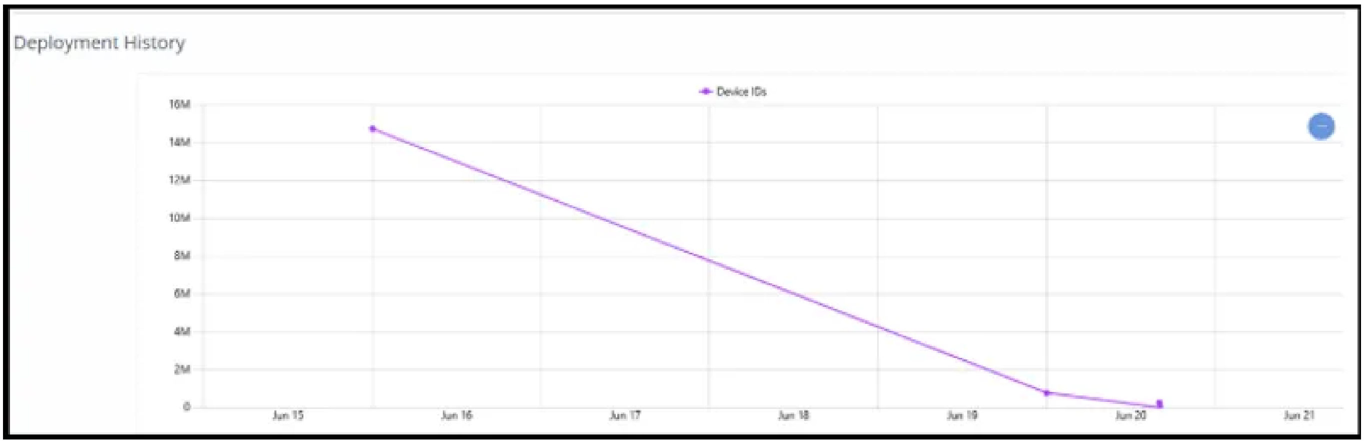
## Google Ad Manager Added as a Deployment Partner

Google Ad Manager is now available as a deployment partner. The integration from Audience Manager to Google Ad Manager enables seamless deployment of audience, dataset, and pixel data to Google Ad Manager for mobile devices.  This includes generating and exporting data files, which ensures full compatibility with Google Ad Manager specifications.

The Deployment Details page in Audience Manager, provides a tooltip that includes the Google Customer Segment ID. Custom Segment ID will be searchable in Google Audience Manager under the Audience name so you can find your data easily.




Additionally, the Deployment History page displays a chart with the current device count, including details on added and removed devices.




To include Google Ad Manager as a partner, contact Cadent Support and ask to enable that destination in your account group.

**Note**: **User Lists** are numeric values, which are unique to each Google Ad Manager deployment. This integration supports incremental deployments, so if you provide an existing User List ID on deployment, we will append or remove data in an existing Google Audience. If you do not specify a valid User List on deployment, Cadent will generate a User List ID dynamically.

# 4.3.6. June 17, 2025 release notes

## BlockGraph integration

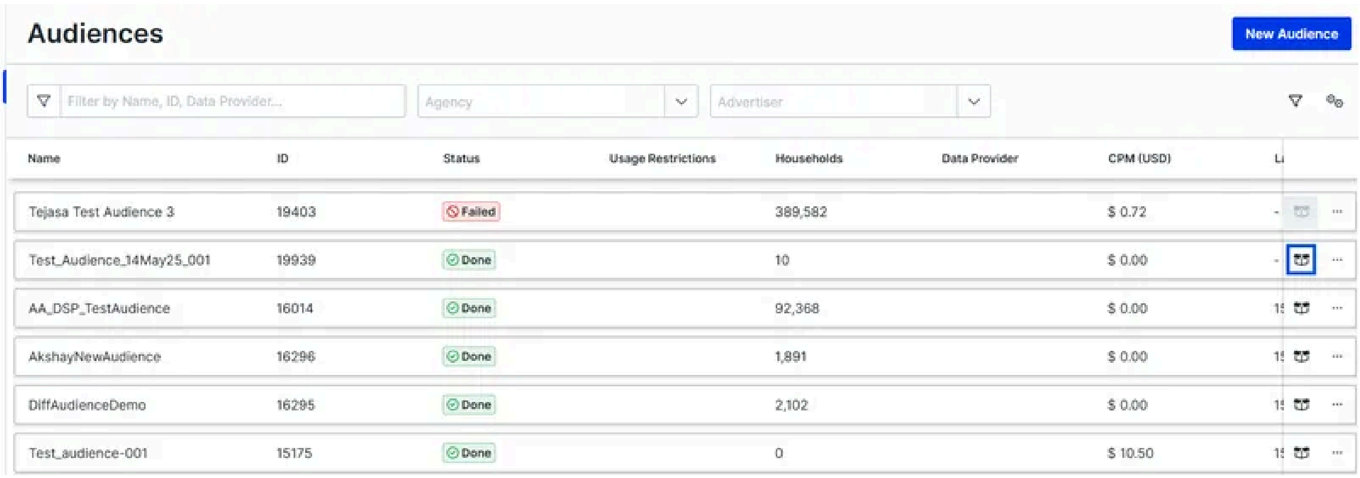
Blockgraph node to node sharing feature helps yol'u to more easily onboard universe files and datasets for all deployments to Blockgraph. If this is something that your organization is interested in, contact your Cadent representative.

## Deployments icon on the audience page

A deployment icon on on the Audience page allows you to create a deployment directly from the audience list. The icon, which displays on the right side of each audience's row, has been updated to the following:

Deployments icon

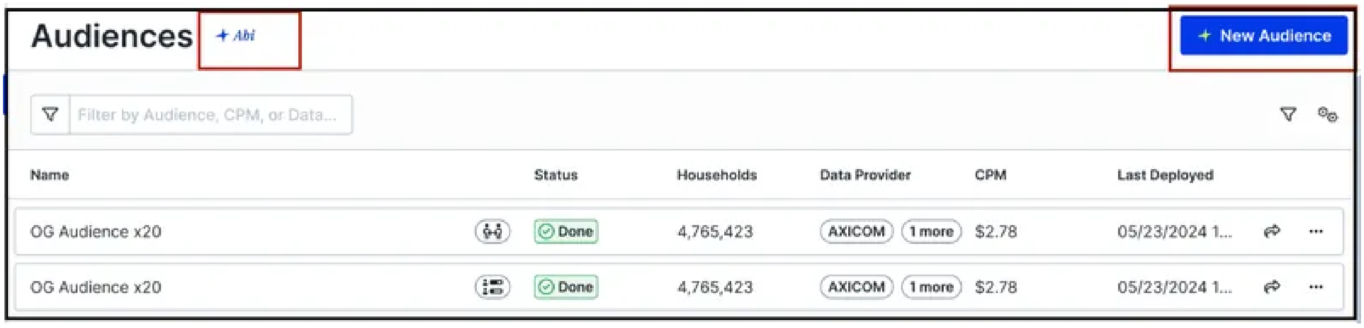
In this example, you see the icon on the Audience page.




Audience page

## AI indicators in the audience manager

We have added a spark icon alongside locations where AI and machine learning are used in Audience Manager. Tooltips that describe how the automation functions display with the icons.




# Deployment guardrails

To reduce the risk of duplicate deployments, we have added the following controls when you create a new deployment:

- The **Schedule** field defaults to every other week
- If you select a weekly deployment, you cannot select more than 3 days as deployment options
- The start and end dates cannot be more than a year in the future

## Data marketplace added to navigation menu

To make it easier for you to access, a link to the Data Marketplace has been added to the left-side navigation menu.

# 5. Audience Manager

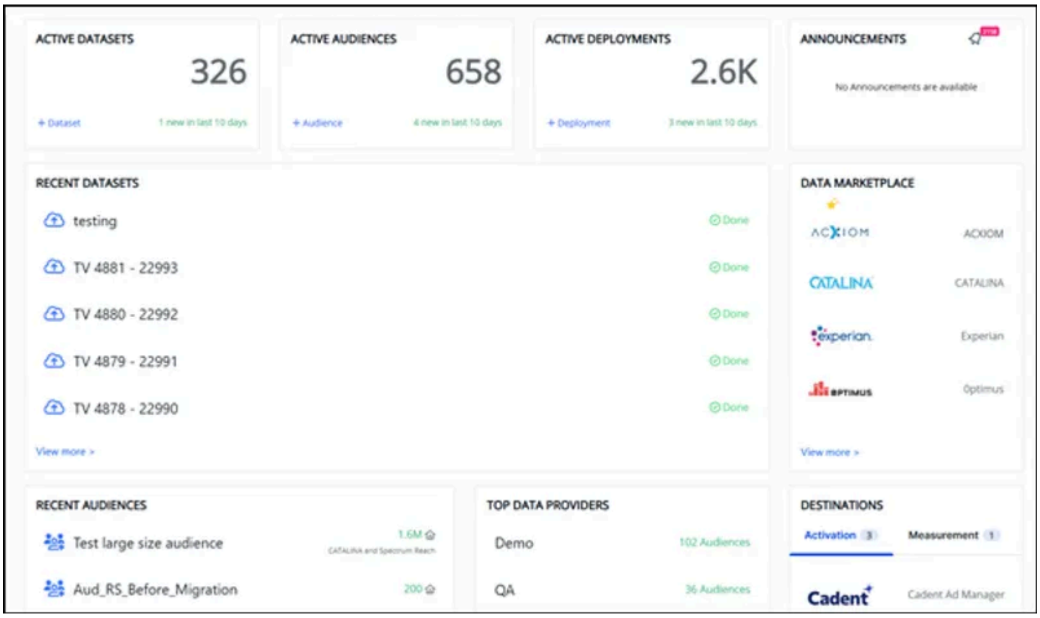
## 5.1. About Audience Manager

Audience Manager is a key component of the Cadent Platform, where you can find 3rd party data in our Data Marketplace and onboard your own first-party datasets, as well. From there, you build audiences that help optimize campaign targeting based on the widest variety of subscriber-related information such as geographic, demographic, marketing segment, membership, service level, or other viewer, household or device-related data. Review all the details of an audience and fine tune it with precision before deploying it to Ad Manager or other DSPs.

The Audience Manager brings AI-powered predictive intelligence to audience planning and measurement. It is built from the ground up with privacy, transparency, and accuracy as central principles.

## 5.2. Audience Dashboard overview

The Audience Dashboard provides a summary of your account and shows how your organization is using the tool. At a glance, you can see the total number of datasets you have created during the last ten days. It shows you how many active audiences and deployments you have, lists top partners, and indicates whether they provide activation or measurement services.




Each tile provides information about a specific aspect of audience activity. Click in a tile for more detail on a topic. The following tiles display:

| Tile | Description |
|---|---|
| Active Datasets | The number of datasets currently in use. |
| Active Audiences | The number of audiences in user. |
| Active Deployments | The number of deployments currently underway. |
| Announcements | Click to access system messages and updates. An icon shows the number of unread messages. |
| Recent Datasets | Provides a list of the names of the most recently used datasets and whether they were successful. Click a dataset to see its details. |
| Data Marketplace | The most heavily used data and measurement partners display. Click the tile to access the Data Marketplace. |
| Recent Audiences | Contains a list of the most recent audiences being used by the platform. Click one of the audiences to see it's details. |
| Top Data Providers | Lists the most commonly used data partners for audiences. Click one to view a list of all audiences associated with that partner. |
| Recent Deployments | Lists the five most recent deployments performed by the system. Click to view the details of a specific deployment. |
| Top Destinations | Lists the most common deployment destinations for audiences. Click a destination to view a list of audiences deployed to that destination. |
| Destinations | Lists the top activation and measurement partners currently being used. Click one to access the deployment setup associated with that partner. |

# 5.3. Datasets

Datasets are containers for audience data that you receive from data providers, which you onboard into the platform and map to any supported digital identifier. Different types of data can be split into multiple datasets.

Associate datasets with audiences and deploy them to a digital partner (destination).

The Datasets page provides details on each dataset that your organization has uploaded. From here you can drill down to access more detailed information on individual datasets. You will see details such as the total number of records in the dataset, the date it was loaded, and whether it is available for building new audiences. You can create and edit datasets directly from the Datasets page.

## About onboarding datasets

When you upload a dataset file, it's status displays on the Datasets page. Color of the Status Icon indicates the current file status using a red, yellow, green color code. A green status that says **Done** means the dataset is fully onboarded and is ready for use.

The following steps illustrate the dataset onboarding process flow:

1. Preprocessing - This is optional case that happens only in case of Postal Address Dataset on-boarding
2. Ingestion & Onboarding - This executes in all cases. It represents the process of receiving the data and processing it in the platform
3. Enabling for Audience - This is optional. It happens only when **Enable In Audience Builder** is selected while creating a dataset.

### Reviewing Dataset Details page

To view additional details review information on the Dataset Details page.

To access dataset details, complete the following steps:

1. On the navigation bar, select **Audiences** > **Datasets**.
2. Click a Dataset in the table. The Dataset Details page displays.

The **Detail** page contain all the information about a specific dataset including things like the type of dataset, the number of unique records, households, devices, and matched IP addresses. You can see information about audiences and deployments with which the dataset is associated.

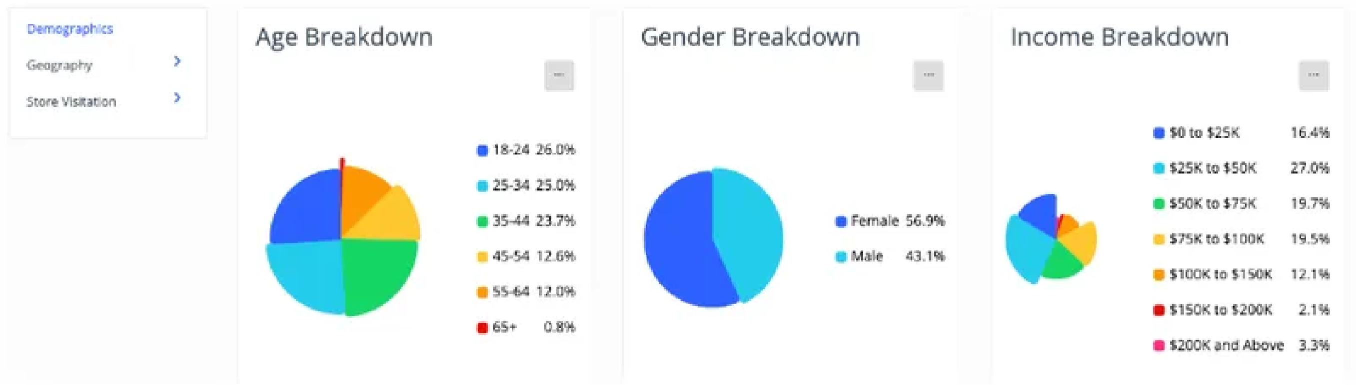
On the **Insights Tab**, you can see demographic and geographic information associated with a dataset.

The **Audit** tab displays all activity performed on the dataset by anyone working at your organization.

For pixel-based datasets only, the pixel tag details display on the **Pixel Tag** tab. Here you can review and edit the details of the tags connecting to a specific Website.

## 5.3.1. View dataset insights

You can find details about a dataset on the **Insights** tab. The dataincludes demographic details, information on the geographic location of the audience, and information on store visits. Each section contains age, gender, and income breakdowns.




To view dataset insights, complete the following steps:

1. On the navigation menu, select **Audience** > **Datasets**. The Datasets list page displays.
2. Select the dataset you want from the table.
3. If necessary, click **Insights**. The Insights tab may display by default.
4. Select the type of data you want from the following options:
    - **Demographics** - Displays data in pie charts based on target audience age, gender and income levels.
    - **Geography** - Displays a heat map of audience distribution by state or by designated market area or State.
    - **My Stores** - Displays a geographic breakdown of the location distribution of the dataset and find details on store visits.

## 5.3.2. Create and edit datasets

Creating a dataset requires different information based on the type of data contained in the data file and how you plan to load it. For example, pixel data include different elements than trade area data. When you select a Dataset Source, the New Dataset page dynamically changes to prompt you for the correct information based on the type of source you are creating.

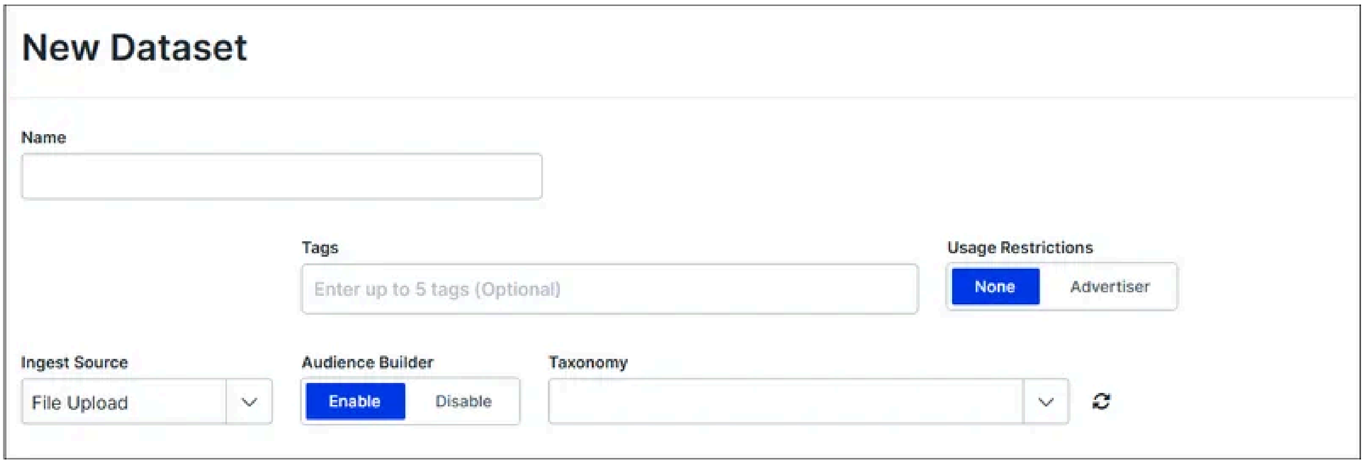
Complete only the sections for the type of dataset you want to upload. There are six types of datasets:

- **File Upload** - for uploading files from your local drive or network
- **Watch Folder** - for uploading files using an sFTP process
- **Pixel Data Matching** - for uploading connection details for pixel-based files
- **Trade Area** - for data sources tied to specific geographic areas
- **API Conversion** - receive datasets through an API integration. When you send the data following an API protocol, it is not necessary to define the data setup or segment mapping. You can assign Attribution and Conversion to this type of datasets.
- **DirectPass** - uses a specialized dataset onboarding and deployment workflow that allows the direct ingestion and deployment of raw device identifiers (such as Device IDs and IP addresses) without first resolving them to Cadent's household graph. Learn more.

> Affiliates can only load File Upload and Watch Folder datasets.

# Dataset name and source details

For all dataset types, complete the following steps before moving forward to entering the specific details for each. The sections that follow provide instructions for each type of dataset that is available:




1. On the left-side menu, click **Audience Manager**.
2. Click **Datasets**.
3. On the Datasets page, click **New Dataset.** The Datasets Setup page displays.
4. At **Name**, Enter a unique name for the dataset.
5. At **Tags**, you have the option to enter a metadata tag or select one from the list if it is already created. The tag displays below the dataset name. Tags provide the ability to create dataset categories and to filter for specific content. This can save you time when you are looking for specific data to satisfy the needs of a specific audience.
6. To restrict the use of a dataset to a specific advertiser, at **Usage Restrictions,** select **Advertiser**, and select the advertiser's name from the **Advertiser** drop down. If necessary, you can select multiple advertisers.
7. From the **Ingest Source** drop-down list, choose one of four options. After you select the source, a details section displays on the page where you define specific information needed for the type of data file you are loading to the dataset:
   **Note:** Affiliate users can only create File Upload and Watch Folder Datasets.
   - **File Upload** - Upload one or more files to make up the dataset. In the File Selection section, select the specific file that contains the dataset.
   - **Watch Folder** - Establish a watch folder location where you can automatically load data files. Files placed here are automatically uploaded at a time interval established for your organization. This method works well when you plan to upload files on a recurring basis. Define the details in the Watch Folder Settings section of the page.
   - **Pixel** - If data is coming in from a website, ad tag, or any service that can make an http call, select Pixel as your source type. Use the Pixel Data Matching section to define the specifics of the device and IP address.

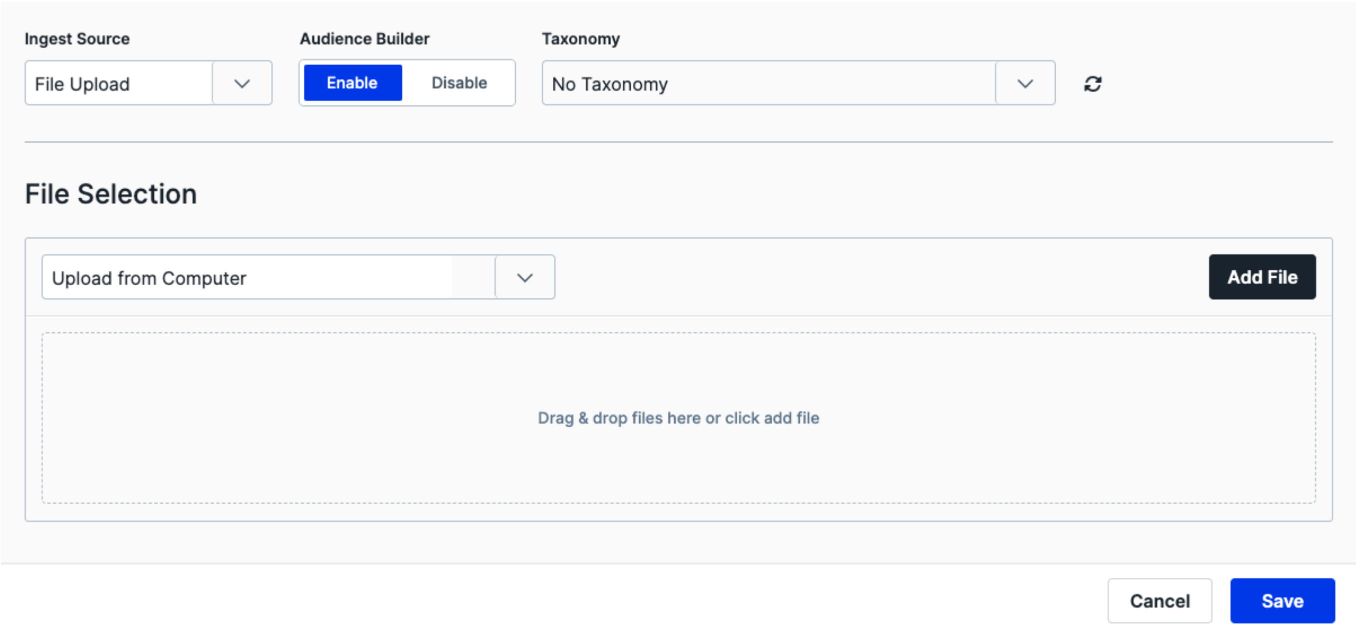
    - **Trade Area** - Define a dataset based on a point of interest or geographic area. Use the Trade Area Settings section to define the specifics of the trade area.
        - **Note:** When creating a dataset using a trade area, you have the option to upload files consisting of latitudes and longitudes to define the geographic region for the dataset. The file should contain only latitude and longitude values. Make the **Input ID Type** Trade Area and assign a **Radius** value that determines the area within which the dataset is to exist.

8. To use the dataset to create an audience at **Audience Builder,** select **Enable**. If you do not want to make a dataset available for audiences in the Audience Builder.
9. At **Taxonomy**, you can select a taxonomy that you have already created, or select **New Taxonomy** if you need a new taxonomy for the dataset. Use taxonomies to keep related data connected and locate what you need more quickly. For datasets with multiple segments and categories, a taxonomy is highly recommended.

10. You can still view the data in Audience Builder if you don’t have a taxonomy. In that case, the segment IDs will serve as the segment names when viewed in Audience Builder.

# Ingest a file upload datasets

If your dataset source is **File Upload,** select the file or files from an active connection or from your computer to upload it into the data file. If you select multiple files, the application appends the data from each file when it ingests it into the dataset. File upload, loads the file into the system once but does not upload it again if changes occur later.




1. To upload a file from a server location, click **Upload from Computer** and select an item from the dropdown that corresponds with the location of the file.
2. Click **Add File** and select the file you want.
   **Note:** You have the option to drag-and-drop files directly in the entry box.
3. Click **Select File**.
4. Click **Save**.
5. To select a file that is an update to an existing file, complete the following steps:
   1. At **File Selection**, choose a file from the drop down.
   2. Click **Add file.** The Select File page displays.
   3. Select a file from the drop down and click **Select Files**.
6. To upload a new file that has not been uploaded before, complete the following steps:
   1. At **File Selection**, select **Upload from Computer** from the drop down.
   2. Click **Add File**.
   3. Navigate to the file you want, select it and click **Open**.
7. At **Field Separator** click the specific fields separator type that applies for the file you are uploading from the drop down.
8. At **Secondary Separator**, click on the secondary field separator type. If the file does not contain secondary separators, click **None**.
9. At **Header Row,** select one of the following:
   - Click **Yes** if the file contains headers.

    - Click **No** if the file does not contain headers.
10. At **Data Update Type**, select one of the following options to define how updates for the file occur:
    - Append - if you want to update only the changed elements in an existing file with the upload, select **Append**.
    - Overwrite - If you want to overwrite the entire file on update, click **Overwrite**.

# Match identifiers

At **Match Identifier**, select the data column that you want to capture. For example, if you want to capture the Postal Address information from the data file, select Postal Address from the drop-down list.

Depending on the Match Identifier that you selected, define the specific fields contained in the data file representing the details that you want. Leave fields blank that you don't want to capture. For example, if your Match Identifier is Postal Address, define the street address, city, state, and zip code fields.

The File Mapping Preview displays the headings, records, and separators based on your entries. Use this section to validate that the record format matches what is contained in the file.

The following are the Match Identifiers:

- (Household) Crosswalk ID — This is a Cadent-generated ID associated with a zip11
- (Household) Postal Address — This is the USPS postal address in the format of address1, address2, city, state, zip
- (Household) zip+4— This is the USPS ZIP+4 Code. The last 4 digits represent a specific delivery route within that overall delivery area
- (Household) zip11 — This is the USPS zip11, which is an 11-digit number that denotes a household.
- IP Address — This is the IP Address of the data coming from a client’s device such as a desktop, laptop, mobile device, or connected TV device.
- Device ID — This can be either a mobile device ID such as Apple’s Identifier for advertising or Google’s Advertising ID. It can also be a connected TV or smart TV device ID.

- email — This is the client email address.
- NPI — National Provider ID is only for audiences that contain healthcare professionals.
- Multi-key (device+ip) - For Direct Pass only. Learn more.

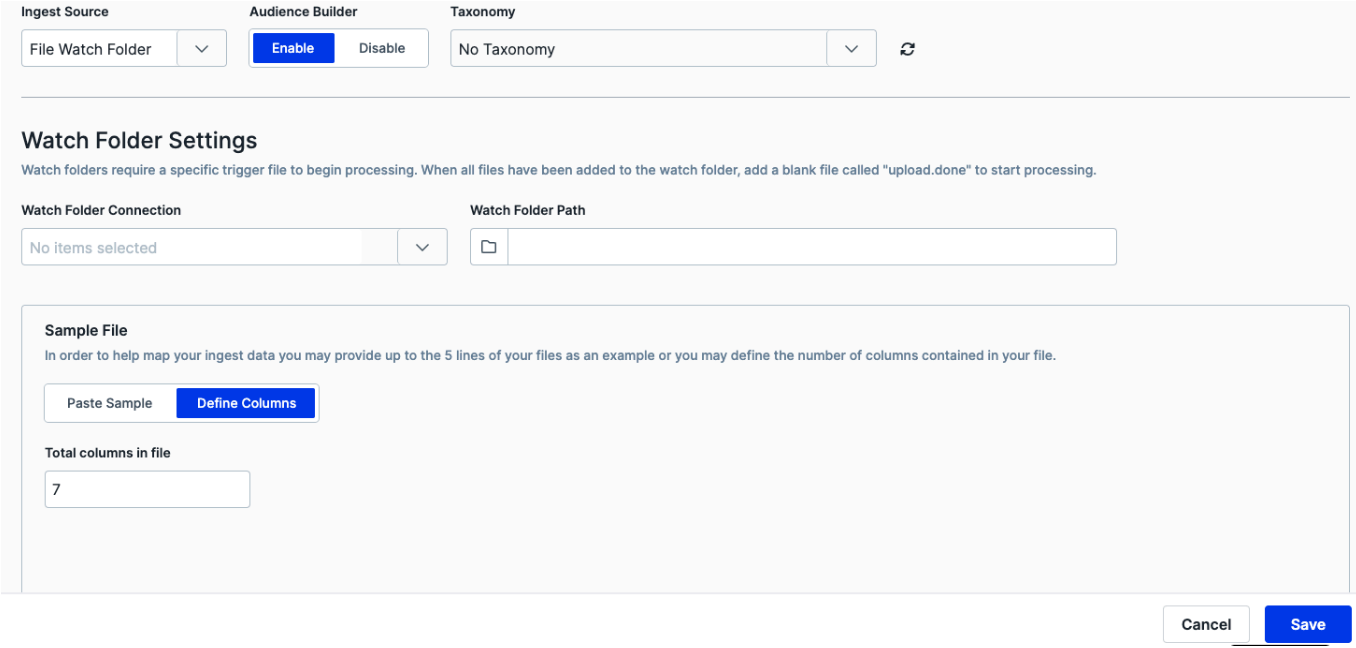
**NOTE:** Affiliate users only have assess to the following Input Types: Household Postal Address, IP Address, Email, and Household zip+4.

## Define segments and attribution

1. Some files are divided into segments, which represent categories of data in the file. At **Segment Defined By**, select one of the following:
   - **None** - There are no segments in the file.
   - **Header** - The segments are defined by the elements in the header.
   - **Records with Separators** - Indicates that the file contains multiple segments.
   - **File (single segment)** - Each segment represents a specific data element (datum).
2. To define attribution tracking, at **Attribution Type** click **Conversions**.
3. If you do not want to define attribution tracking to the dataset, at **Attribution Type**, click **None.**
4. Click **Save**.

# Ingesting watch folder datasets

If your dataset source is **Watch Folder**, such as an sFTP site to upload files, capture the details that allows the system to upload the files correctly. Select a watch folder data source when you want the file to be updated whenever a change occurs. The system uploads a new version of the file every time a change is made.




1. At **Watch Folder Connections**, select the server connection where the file is saved. The Watch Folder Path automatically displays the URL.
2. If necessary, at **Watch Folder Path**, enter the URL for the location of the watch folder. This is the location from which files can be uploaded.
3. To paste a sample record from your local machine or network, select **Paste a sample record**. The display box below shows up to five lines of the sample.
4. To define which columns in the file represent the dataset, select **Define Columns** and at **Total Columns in File**, enter the number of columns included in the data file for each record. For example, you might select this option for files contained in an Excel spreadsheet with an unlimited number of columns available, but only the first few columns are set up with data.
5. To paste a sample record from your local machine or network, select **Paste a sample record**. The display box below shows up to five lines of the sample.
6. At **Secondary Separator**, click the secondary field separator type. If the file does not contain secondary separators, click **None**
7. At **Header Row?**, select one of the following:
   - If the file contains headers, click **Yes**.
   - If the file does not contain headers, click **No**.
8. At **Data Update Type**, select one of the following options to define how updates for the file occur:

- If you want to update only the changed elements in an existing file with the upload, select **Append**.
- If you want to overwrite the entire file on update, click **Overwrite**.

## Matched identifiers

At **Match Identifier**, select the data column that you want to capture. For example, if you want to capture the Postal Address information from the data file, select Postal Address from the drop-down list.

Depending on the Match Identifier that you selected, define the specific fields contained in the data file representing the details that you want to capture. Leave fields blank that you don't want to capture. For example, if your Match Identifier is Postal Address, define the street address, city, state, and ZIP-Code fields.

The File Mapping Preview displays you the headings, records, and separators based on your entries. Use this section to validate that the record format matches what is contained in the file.

The following are the Match Identifiers:

- (Household) Crosswalk ID — This is a Cadent-generated ID associated with a zip11
- (Household) Postal Address — This is the USPS postal address in the format of address1, address2, city, state, zip
- (Household) zip+4— This is the USPS ZIP+4 Code. The last 4 digits represent a specific delivery route within that overall delivery area
- (Household) zip11 — This is the USPS zip11, which is an 11-digit number that denotes a household.
- IP Address — This is the IP Address of the data coming from a client's device such as a desktop, laptop, mobile device, or connected TV device.
- Device ID — This can be either a mobile device ID such as Apple's Identifier for Advertising or Google's Advertising ID. It can also be a connected TV or smart TV device ID.
- email — This is the client email address.
- NPI — National Provider ID is only for audiences that contain healthcare professionals.
- Multi-key (device+ip) - For Direct Pass only. For details, see **Learn more**.

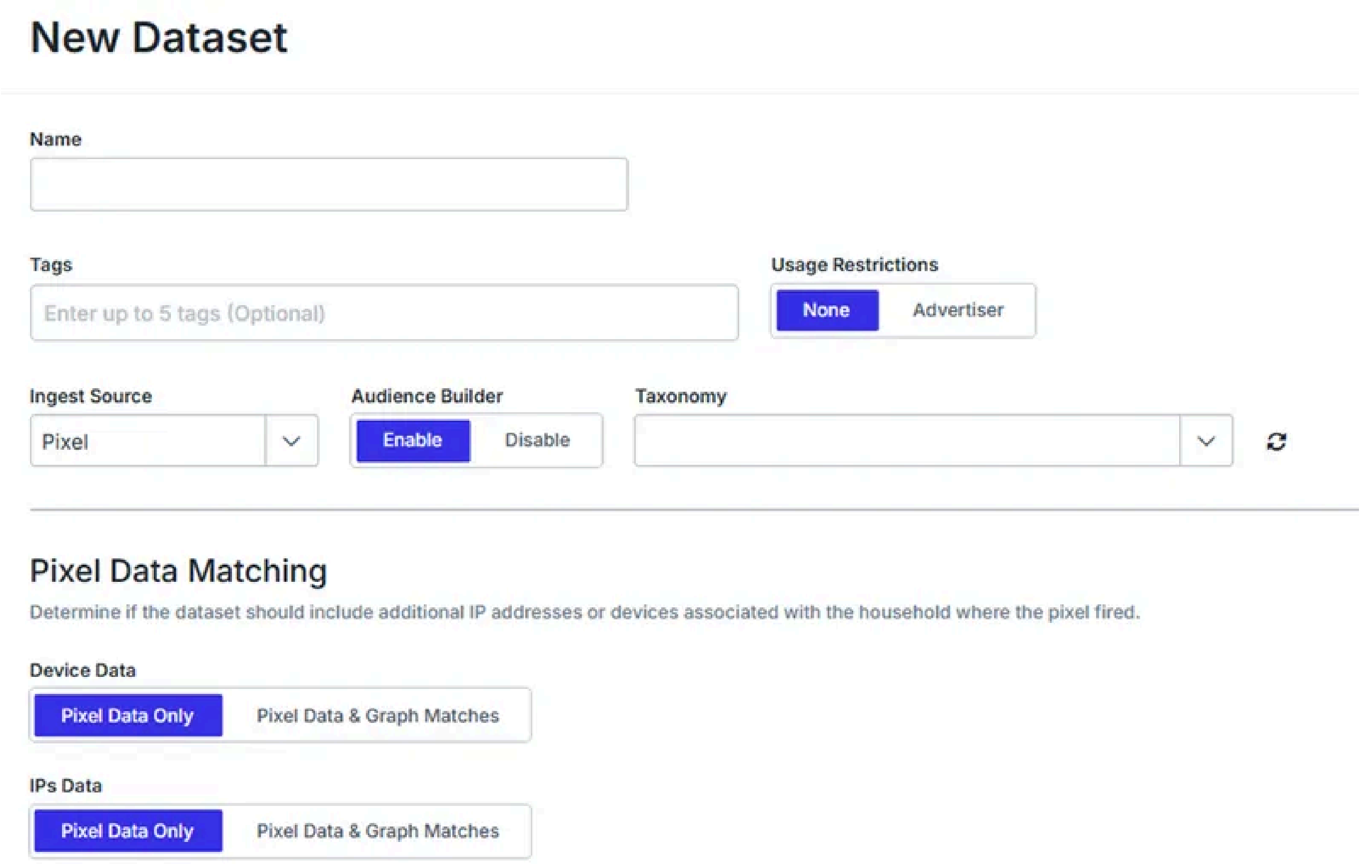
**NOTE:** Affiliate users only have assess to the following Input Types: Household Postal Address, IP Address, and Email Household zip+4.

### Define segments and attribution

1. Some files are divided into segments, which represent categories of data in the file. At **Segment Defined By**, select one of the following:
    - **None** - There are no segments in the file.
    - **Header** - The segments are defined by the elements in the header.
    - **Records with Separators** - Indicates that the file contains multiple segments.
    - **File (single segment)** - Each segment represents a specific data element (datum).
2. To define attribution tracking, at **Attribution Type** click **Conversions**.
3. If you do not want to define attribution tracking to the dataset, at **Attribution Type**, click **None.**
4. Click **Save**.

## Ingest pixel datasets

A pixel obtains data in real time by sending information from a specific Web Site about its traffic. A pixel template defines the fields in the transmitted files that the application receives.




1. At **Device Data**, choose one of the following options: Select **Pixel Data & Graph Matches** if you'd like to include additional Devices or IP addresses from the Cadent Identity Graph to your pixel file based on the household linkage; otherwise choose **Pixel Data Only**.
2. At **IPs Data**, choose one of the following:
   - Enable **Pixel Data Only** if you are passing the pixel fires to a destination. This ensures that the pixel is picking up the same identifier accepted by the destination.
   - Enable the **Pixel Data & Graph Matches** to ensure necessary identifiers are appended to the file. For Example, if the destination accepts Device ID only, but the pixel is only picking up IPs, then the Graph match will append associated Device IDs automatically.
3. Click **Save**.

# Setting the pixel tag

After creating the pixel dataset, you must setup the pixel tag and share it the individuals responsible for its placement on the internet placement.

[Learn more about pixel tags](#).

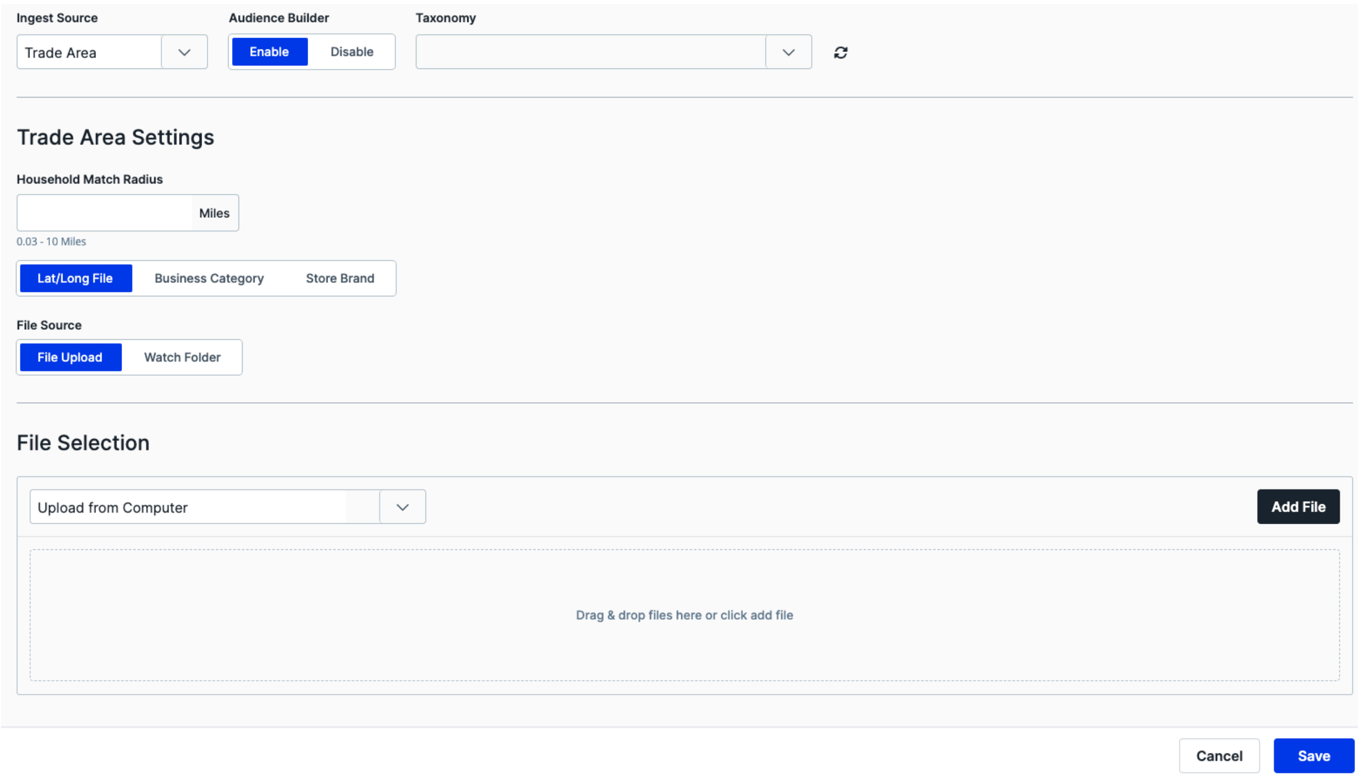
# About pixel fires

After the pixel is placed, pixel fires will start to be collected by the platform.

- Users can click on the pixel details page to see the fires and match rates. Pixel fires are updated daily
- Insights will also be available based on the fires matched to the Cadent Identity Graph
- If the Audience Builder option was enabled, users should see the matched counts available within Audience Builder for use in audience creation.
- If Segments were carried in the pixel logic, segment headers can also be seen in Audience Builder
- Audience Builder is updated on a weekly basis on Sunday evening

# Ingest trade area geographical settings

**If the dataset source is trade area**, complete the following steps:



1. At **Household Match Radius**, enter a numeric value. Your entry defines the number of miles around the business or latitude and longitude where household impressions can be obtained.
2. To upload a file that uses Latitude and Longitude to define the trade area, click **Lat/LongFile.** The file you upload must contain only latitude and longitudes.
    1. Click **Add File** and select the file you want from your local machine or network, or drag and drop the files you need into the entry box.
    2. To upload the latitude and longitude file using a watch folder, click **Watch folder**. See the Watch Folder Settings section above for details.
3. To define a trade area based on a type of business, click **Business Category**.
    1. Select businesses from the entry box and click the arrows to move your selections into the Selected POIs box.
4. To define a trade area based on a specific brand, click **Store Brand**.
    1. Select businesses from the entry box and click the arrows to move your selections into the Selected POIs box.
5. At **Match Locations**, further define the geographic location business or brand for the trade area:
    1. To determine the trade area based on State, select one or more options from the **States** drop down.
    2. To defines the trade area based on a designated market area, at DMAs, select one or more from the **DMAs** drop down.
    3. To define the trade area based on ZIP-code, enter one or more **ZIP-codes**. Separate each entry with a comma.
6. Click **Save**.

# Ingest a conversion API

**If your dataset source is Conversion API**, define the crosswalk to connect the web service for file ingestion. Complete the steps here after you enter the Dataset Name and Source Info on the Create Dataset page.

1. At **Match Identifier**, select **Crosswalk ID** from the drop down. The Crosswalk ID field displays.

2. At **Crosswalk ID**, select the crosswalk file that applies for the dataset from the drop down.
3. If necessary, define attribution and conversion tracking for the dataset.

**Add Attribution and Conversion**

You are not required to include attribution and conversion details to the dataset when you onboard the data; however, if you need to the option is available.

Attribution is the process of identifying and assigning credit to various touch-points that contribute to a desired outcome, such as a sale or conversion. It aims to understand which channels, campaigns, or actions are most effective in driving customer engagement and conversion. If you are using a DSP for attribution optimization (whether ours or another DSP), complete the Attribution section when creating or editing a  Dataset to tag the it as being used to collect the conversion event data.

When you specify that the data file contains conversion event data, that means that each record or row in the file should contain data about a conversion event that occurred. A conversion event can be an actual sale of a product or could be a website visit, mobile app download, someone physically visiting a store, or a number of other events.

To set an attribution, perform the following steps:

1. If the dataset does not contain attribution information, at **Attribution** select **None** and click **Save.** The dataset is saved.
2. If the dataset contains attribution information, at Attribution select **Conversion.**
3. To select an existing **Attribution ID**, make a selection from the drop down. When you select an exiting Attribution ID, the dataset is associated with other datasets, which are applied to a specific campaign.
4. To assign a new ID, complete the following steps:
    1. At **Attribution ID**, click the down arrow and click **Create New Attribution ID**. The New Attribution page displays.
    2. At **Name** enter a unique ID for the attribution.
    3. At **Campaign ID**, enter the ID associated with the campaign with which the new attribution is associated.
    4. At **Flight Start** and **Flight End**, use the calendar tool to select the flight start and end dates. This defines the period during which the attribution occurs. The time

frame defined is required when determining the specific attribution conversions within the campaign.

5. At **Attribution Window**, enter a numeric value for the number of days after the campaign during which attribution conversions can still be counted toward the campaign.
6. Click **Save**.

5. At **Conversion Type**, select a value from the drop down. The conversion type represents specific type of event you want to track which defines the attribution the campaign seeks to achieve. Select one of the following values:
   - **email_clickthrough** — clickthrough event based on email
   - **site_clickthrough**— event is triggered whenever a site visitor clicks a link in a site page or display ad
   - **website_visit**— conversion event based on site visit
   - **online_purchase**— conversion event based on online purchase
   - **app_install** — conversion was based on mobile app installation
   - **in_app_purchase** — conversion was based on mobile in app purchase
   - **physical_store_visit** — conversion event based on store visitation
   - **offline_purchase**— conversion event based on offline or in-store purchase
   - **phone_call** — lead generation event by phone
   - **chat_event** — conversion event was made through a messaging app, SMS, or online messaging feature
   - **system_generated** — conversion happened automatically, for example, a subscription renewal that's **set to auto-pay each month**
   - **other** — conversion happened in a way that is not listed.
6. At **Mapping Column**, select the column from the file that contains the conversion data. The columns that display are contained in the file being uploaded.
7. At **Timestamp** enter the date, or the date and time, associated with the dataset.
8. Click **Save**.

# 5.3.2.1. DirectPass dataset file onboarding

DirectPass uses a specialized dataset onboarding and deployment workflow that allows the direct ingestion and deployment of raw device identifiers (such as Device IDs and IP addresses), without first resolving them to Cadent's household graph. DirectPass datasets don't include the household-level information.

You can use DirectPass for the following:

- Targeting for non-US regions, such as Canadian segments used in Ad Manager.
- Passing raw identifiers directly to destination partners that have their own identity resolution systems.

**Note:** You must have DirectPass enabled for your organization to perform this type of data onboarding. If interested, contact your account manager.

# What Happens When DirectPass is Enabled?

Enabling this option provides the following results:

- **Disables Household Export:** The standard household-level export is turned off.
- **Delivers Raw IDs**: The raw Device IDs and IP addresses from your original file are delivered directly to the destination partner.
- **Provides Raw Counts**: The Device ID and IP reach counts shown on the deployment screen reflect the counts from your raw data, not the counts from the Cadent graph.
- **Allows Subtype Selection**: You can choose to deploy specific combinations of identifiers and their subtypes (for example, Android Devices + IPv4 only).

After enabling the toggle and confirming your settings, you can deploy the audience as you normally would.

A tooltip over the toggle provides the following information to alert you when DirectPass is in use:

```
DirectPass deployments deliver IDs to your destination without resolving to
the Cadent graph.
```

# Onboarding a DirectPass dataset

The process for onboarding a DirectPass dataset is similar to creating a standard File Upload or Watch Folder dataset. You must select the correct Match Identifier to enable the DirectPass functionality.

To onboard a DirectPass Dataset, complete the following steps:

1. Select **Datasets** and click **New Dataset**.
2. At **Name,** enter a unique name for your dataset.
3. Add any relevant tags for categorization, in **Tags**.
4. To restrict usage to specific advertisers, at **Usage Restrictions** enter advertisers that can use the dataset.
5. At **Ingest Source,** Select **File Upload** or **Watch Folder**.
6. From the **Match Identifier** drop down, select the **Multi-key (device+ip)** option to designates the dataset for the DirectPass workflow.

   This option ensures that the raw IP addresses and device IDs in your file are made available for the DirectPass deployment workflow.

7. Configure the remaining settings for your File Upload or Watch Folder dataset as you normally would (for example, pipe field separators, commas for segment separators).

# DirectPass file format requirements

Your data file must contain the specific columns defined here. The platform will fail the onboarding process if these required fields are not included.

**Required File Columns:**

| Column Name | Description | Accepted Values |
|---|---|---|
| ID | The external raw e-identifier | This can be an IP address like 192.168.1.1 or<br>Device ID like AEBE52E7-03EE-455A-B<br>3C4-E57283966239 |
| ID_TYPE | The general category for the identifier | IP, Mobile Device, CTV |
| ID_SUBTYPE | The specific type of the identifier.<br><br>The value for this column depends on the ID_TYPE. | **For Mobile Device**<br>• Android Phone<br>• iOS Phone<br>• Android Tablet<br>• iOS Tablet<br>• Other<br>**For CTV**<br>• Roku<br>• Apple TV<br>• Fire TV<br>• Chromecast<br>• Xbox<br>• Sony<br>• Samsung<br>**Other, For IP**<br>• v4<br>• v6 |

# Taxonomy file requirements

If your device file contains segments, ensure the taxonomy contains a mapping of the **segment_ids** in the onboarded data file. The filename should clearly identify the file as a taxonomy and not a data file.

We recommend a format that contains the name of the audience, the taxonomy name, and the date the file was created.

For example, **audience-name_taxonomy-name_date.csv** has the minimum requirements for a taxonomy file, which consists of three columns.

| segment_id | segment_name | CPM |
|---|---|---|
| segment_1 | Frequent paper towel users | $1.75 |
| segment_2 | Infrequent paper towel users | $1.25 |

In cases of a nested hierarchy, the following is an example that includes the minimum four accepted columns:

| segment_id | parent_id | segment_name | CPM |
|---|---|---|---|
| category_name_1 | ROOT | Goods | |
| subcategory_name_1 | category_name_1 | Paper towels | |
| subcategory_1_segment_1 | subcategory_name_1 | Frequent paper towel users | $1.75 |
| subcategory_2_segment_2 | subcategory_name_1 | Infrequent paper towel users | $1.25 |

# Taxonomy file formatting best practices

The following practices are required for the taxonomy file:

- Any segment IDs are the same as the comma-delimited IDs from your data file
- Only alphanumeric or underscore characters are supported in the file
- Do not use the following characters: **!, @, #, $, %, &, *, ^**
- The length of each field should not exceed 1024 characters
- If you have special characters in your segment name, enclose the name in double quotes

# Using DirectPass datasets on the New Audience page

## Identifying DirectPass datasets

After your file is successfully onboarded, the dataset appears in the **My Datasets** tab on the New Audience page. You can identify it by the **directpass** tag displayed with the dataset name.

The **Match Key** column on the dataset list page shows **device+ip**.

## Audience building rules

- You can combine a DirectPass dataset with other DirectPass datasets.
- If you build an audience that combines a DirectPass dataset with any other segment type (for example, standard household-matched segments), the entire audience reverts to the standard deployment process. It will only deploy using Cadent-matched household devices, and the DirectPass option will not be available.
- When you save an audience containing only DirectPass-eligible datasets, it automatically receives a **directpass** tag or icon next to the audience's name for easy identification.

# Deploying a DirectPass audience

The final step is to deploy your DirectPass audience to a destination. The combination of the destination and audience must both be eligible for DirectPass or the DirectPass control will not be selectable.

1. On the deployment screen, select your desired destination and the DirectPass-tagged audience you created.
2. Select the **Directpass** toggle**.**

# Example DirectPass dataset

The following is an example of the minimum requirements for a DirectPass dataset file. It must include an ID Type and ID Subtype.

| ID | ID Type | ID Subtype |
| --- | --- | --- |
| 9196549F-F411-536D-B818-A | Mobile Device | Android Phone |
| 2600:1700:8091:dc0:: | IP | v4 |
| 2601:647:8500:dc20:: | CTV | Roku |

**Note:** If the required fields are not included, the onboarding fails and you receive the following message: **Match key formatting requirements were not met.**

# 5.3.2.2. About taxonomies

The taxonomy associates the segment IDs with the segment names. For more complex data, the taxonomy can define a hierarchy which makes visualizing the output data more clear.

The segment name is viewed by the buyer of the data, in the Demand Side Platform (DSP), or even another Data Management Platform (DMP).

You create new taxonomies in the Setup tool, Create and edit a taxonomy

**Note:** When sending data to Cadent, you must use the segment ID.

## Taxonomy File Format

Following are the format requirements:

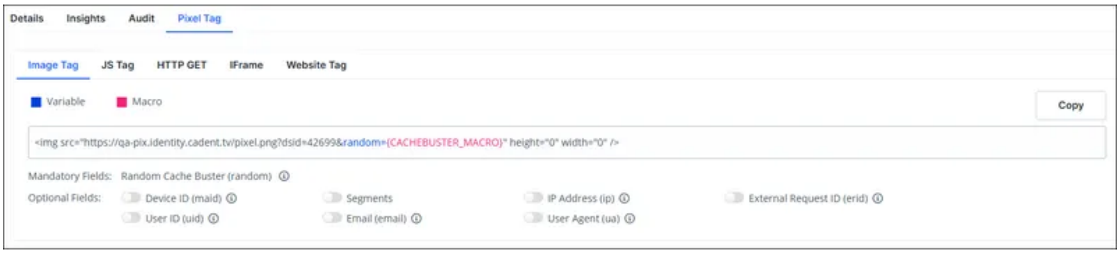
- The supported file formats are csv, and txt when the file is uncompressed; .zip or .gz formats are used if the file is compressed.
- Segment ID must be 127 alphanumeric characters or less with no special characters except for an underscore "_".
- There should be only one ROOT element as the top element in the taxonomy hierarchy, for example parent_id is null.
- For a flat taxonomy, all the parent nodes under the ROOT node has parent_id pointing to the root.
- The child segments reside under these parent nodes and have their parent_IDs pointing to the segment ID of their respective parent.

# 5.3.3. Assigning or editing pixel tags

A pixel is a type of dataset that obtains campaign information from a website in real time and sends information about its traffic. After you create a pixel dataset, you can tag the website to begin collecting data.

To create pixel tags, complete the following steps:

1. On the navigation menu, click **Datasets**.
2. Click the pixel dataset you want from the table. The Dataset Details page displays.
3. Click the **Pixel Tag** tab.




1. Select the specific type of pixel tag you want based on the type of banner ad placed on the site by clicking one of the following options. As you make a selection, the variable and macro code is automatically adjusted to match your choice:
   - Image Tag
   - JS Tag
   - HTTP Get
   - IFrame
   - Wbsite Tag
2. You can select any **Optional Fields** that provide information, which you want to have included with the pixel fires. You are not required to select any optional fields but can select as many as you want.
   - **Device ID (maid) -** Used to identify mobile devices.
   - **Segments** - The fields in the transaction file. If you select this option, you must choose whether the segments display in a .csv list, or in key value pairs. If you select segments as key-value pairs, you must add each key and its matching value.

- **Email (email)** - Email address of the logged in user. May be hashed (randomized to avoid identification).
- **IP Address** - If the request is sent from a server, this is the IP address of the user.
- **User Agent (us)** - URL encoded user agent if the request is sent from a server.
- **External Request ID (erid)** - Can be used to identify each pixel uniquely. This is an alphanumeric field.
- **User ID (uid)** - Identifies a unique user or partner platform. Tracks the user across devices. May be a cookie ID for users who are not logged in.

3. Select the card for the appropriate data partner so that the pixel tag uses the provider format. Note that the variable and macro code for the pixel updates automatically based on your selection.
4. Select the **Website Tag** tab. The appropriate code is automatically loaded in the entry field.
5. If you want Cadent to auto-populate the macro, based on the fields and cards you have selected, click **Copy.**

## 5.3.4. Archiving datasets

After a dataset is archived, it can no longer be used in the platform. To archive a dataset, complete the following steps:

1. From the Navigation menu, select **Datasets**.
2. In the row for the dataset you want, click**...** and select **Archive Dataset**. A confirmation message displays.
3. Click **Yes**.

## 5.3.5. Clone a dataset

You can create a new dataset with some of the attributes of an existing dataset. This is called cloning and it saves time when building a new dataset.

To clone a dataset, complete the following steps:

1. On the navigation menu, select **Datasets**. The Datasets list page displays.
2. In the row for the dataset you want, click **...** and select **Clone Dataset**. The Cloning <dataset name> page displays.
3. At **Dataset Name**, enter a unique name for the dataset. The field displays "copy_of..." followed by the cloned dataset's name. We recommend changing the name to one that is more reflective of the new dataset.
4. Update the field values as necessary. You must change at least one field because all datasets must be unique. **Learn more.**
5. Click **Save**.

## 5.3.6. Compare overlap in first-party segments, datasets, and audiences

You can compare any segments contained in your organization's first-party datasets with an audience or another dataset to get an understanding of the audience overlap. After you complete a comparison, a table displays the following information:

- **Segment** - ID for each segment in the dataset displays
- **Dataset** - The dataset name
- **Total HH (household)** - the total household count for the dataset.
- **Overlapping HH** - indicates the total number of households present in two or more datasets or segments
- **Aud. Overlap** (Audience Overlap) - indicates the total number of households present in two or more audiences
- **Index** - A numerical value that represents the concentration of a specific attribute (like a behavior, interest, or demographic) within your selected audience compared to a baseline or reference population

**Note:** This feature is not available for all accounts. If you would like it to be enabled for your organization, contact your customer success representative.

To compare a first-party dataset to an audience, complete the following steps:

1. On the left-side Navigation bar, click **Audiences**. The Audiences page displays.
2. Click the row for the audience you want. The Audience Details page displays.
3. Click **Insights > Test 1st Party Insights**. The Test 1st Party Insights tab displays.
4. Click **Manage Insights**.
5. Click **+**. The New Custom Insights panel displays.
6. At **Name**, enter a name for the new insight.
7. At **Usage Option**, select one of the following options:
    - **Account Wide** - The insight becomes available to all users on your account.
    - **Local** - The Insight can only be seen on the current audience or dataset
8. At **Custom Insight Group**, enter a name for the group. Create Insights panel appears.

9. At **Insight Name**, enter a name for the insight.
10. At **Compare Datasets**, select a dataset that you want to use in the comparison.
11. At **Available Segments**, select one or more segments that you want to compare the dataset with.
12. Click **Apply**. The Manage Insights tab displays with the datasets and segments of your selection inside a tile.
13. Click the **Insights** tab. The insights you defined display on a new subtab. The name displays at the top of the tab and the Group Name below it. The results display in table format.
    **Note:** If a segment or dataset is invalid, then a warning displays in front of it on the Insights tab when you select it from the available segments.
14. To remove an insight group, click the trash can in the group's tile and select **Remove** in the confirmation page.

# 5.3.7. Manage group opt-out options

This article describes how our system supports households that decide to *opt out* of being included in dataset or audience activity. While our system operates at the household level, the opt-out option is our way of protecting individuals' privacy requests and protecting the consumer on behalf of our partners and clients.

You have the ability to send us files that contain a list of IDs corresponding to households that have opted out from audience and dataset participation. The files you send contain the the opt-out IDs that correspond to the household location and function only to exclude each location and the individuals at those locations from being included in any dataset.

Your first-party data is filtered against the opt-out list before the data is onboarded to the system as part of a dataset. Deployments are also filtered to ensure opt-out IDs are removed.

Complete this process working directly with Cadent's Support team. Details that follow provide information on how you send the data to us and how it is dealt with by our platform.

## Data requirements

You can connect to our automated workflow for consumer data deletion using SFTP or S3 protocols and post multiple ID types for data deletion requests. Each ID type must be connected to a separate subfolder in the SFTP or S3 file structure.

For each ID type, you can post data in all hash key types; however, they must be consistent for each ID type. For example, emails are always hashed using SHA256.

### Data types

We support opt-out using the following data types:

- device
- zip11
- crosswalk
- IP address

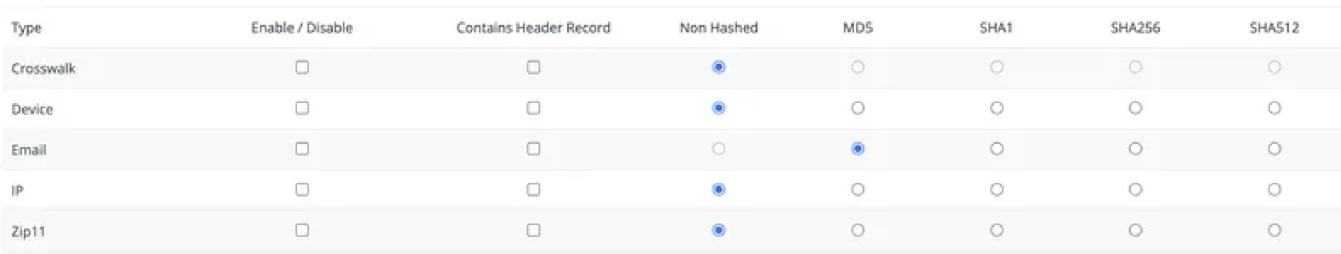
- email

The following example shows the opt-out files placed in the following respective S3 folders (an Amazon Simple Storage Service) for processing:

- s3://<*org-specific domain*>/cadent/OptOut/crosswalk/
- s3://<*org-specific domain*>/cadent/OptOut/device/
- s3://<*org-specific domain*>/cadent/OptOut/ip/
- s3://<*org-specific domain*>/cadent/OptOut/zip11/
- s3://<*org-specific domain*>/cadent/OptOut/crosswalk/

In the above example - **s3://<*org-specific domain*>/cadent/OptOut** is the base path, where <*org-specific domain*> is a variable for your organization's specific file share location. Device ID opt-outs will need to go to /devices sub folder, and so on.

We accept plain and hashed opt-out files; however, if you are set to send us sha1 hash opt-out emails, then we can only support onboarding of sha1 hashed emails. The hash must remain the same.



| Type | Enable / Disable | Contains Header Record | Non Hashed | MD5 | SHA1 | SHA256 | SHA512 |
|---|---|---|---|---|---|---|---|
| Crosswalk | ☐ | ☐ | ● | ○ | ○ | ○ | ○ |
| Device | ☐ | ☐ | ● | ○ | ○ | ○ | ○ |
| Email | ☐ | ☐ | ○ | ● | ○ | ○ | ○ |
| IP | ☐ | ☐ | ● | ○ | ○ | ○ | ○ |
| Zip11 | ☐ | ☐ | ● | ○ | ○ | ○ | ○ |

## File format

The following table defines the formatting requirements for data files to be sent.

| Criteria | Description |
| --- | --- |
| Header Record | Optional. |
| Number of Columns | One |
| Supported File Extensions | • .gz<br>• .zip<br>• .csv<br>• .txt<br>• .dat |

## Data submission

You will be assigned a watch folder by Cadent, which will be swept for updates on a weekly basis. We treat it as a block list prior to distributing audiences to the customer.

It takes approximately 1-hour to process an opt-out file.

Our system adds the data to a group opt-out table for exclusion from datasets. During inbound and outbound information flow, these households are excluded regardless of the footprint selected.

If you are interested in providing opt-out records to Cadent, contact **support@cadent.tv** .

# 5.3.8. Datasets page details

The Dataset page provides details on all the datasets available to your organization and provides a jumping-off point for creating new datasets, editing existing datasets, and accessing details about the datasets.

The following columns are available by default on the Datasets List page:

- **Name** - The name created for the dataset. When selecting which columns you want to display, the dataset name can't be removed from the page.
- **Status** - Indicates whether or not the dataset is loaded and available for use in audiences. Only a dataset with the status Done, is available for use in an audience. Failed indicates that the dataset couldn't be loaded and Pending indicates a dataset that is in the process of loading.
- **Usage Restrictions** - Some datasets can only be used with specific advertisers. If the dataset can only be used by one advertiser, that advertisers name displays in the column. If the restriction applies to multiple advertisers, the number of advertisers the dataset is restricted to displays. Focus the cursor on the number in the column to see the names of the advertisers.
- **Source** - This indicates the type of dataset. For example, **Watch Folder**, **Conversion API**, **Pixel**, **Trade Area Point of Interest**, **DirectPass**, or **File(s)** may appear.
- **Shared by** - Shows the organization that was the source of the dataset.
- **Households** - A numeric value that indicates the number of households included in the dataset.
- **Match Rate** - Provides unique records for the specific IDs that were matched.
- **CPM** - Cost per thousands for usage fees that are applied to all first-party data onboarding. The fee is factored into audiences built using the dataset.
- **Data as of** - (displays by default) The date in MM/DD/YYYY format when data was last uploaded to the dataset. If blank the dataset has not been updated.

Datasets are organized onto three separate tabs:

- **My Datasets** - These are a the datasets that your organization created.

- **Shared Datasets** - Displays datasets that you received from partners. These datasets cannot be edited.
- **Affiliates** - If your organization has associated affiliate users, a list of the datasets shared between your organization and its affiliates display.

The following controls allow you to perform actions:

- **Filter by Dataset ID, Name or Match Key entry field** - Enter Dataset ID, Dataset Name, or Match Key ID to display specific datasets in the table.
- **Filter by Agency or Advertiser** - When you filter based on the agency or advertiser, only datasets that can be used by that organization display. When you filter by advertiser, only advertisers for a specific agency displays.
- **New Dataset** - Click to build a new dataset.
- **Refresh** - Refresh the page to show updates since you loaded the page or since the last time you refreshed.
- **Gears icon** - Advanced Filter. Click to define the contents that you want to display on the page.
- **...** - Click this menu provides access the following functions, Edit Dataset, Add Deployment, Clone Dataset, and Archive Dataset. Select the columns you want to display on the Datasets page

# Select the columns you want to display on the Datasets page

You can decide the specific columns that display on the Datasets List page. The columns you select remain each time you view the page. To change which columns display on the datasets page, complete the following steps:

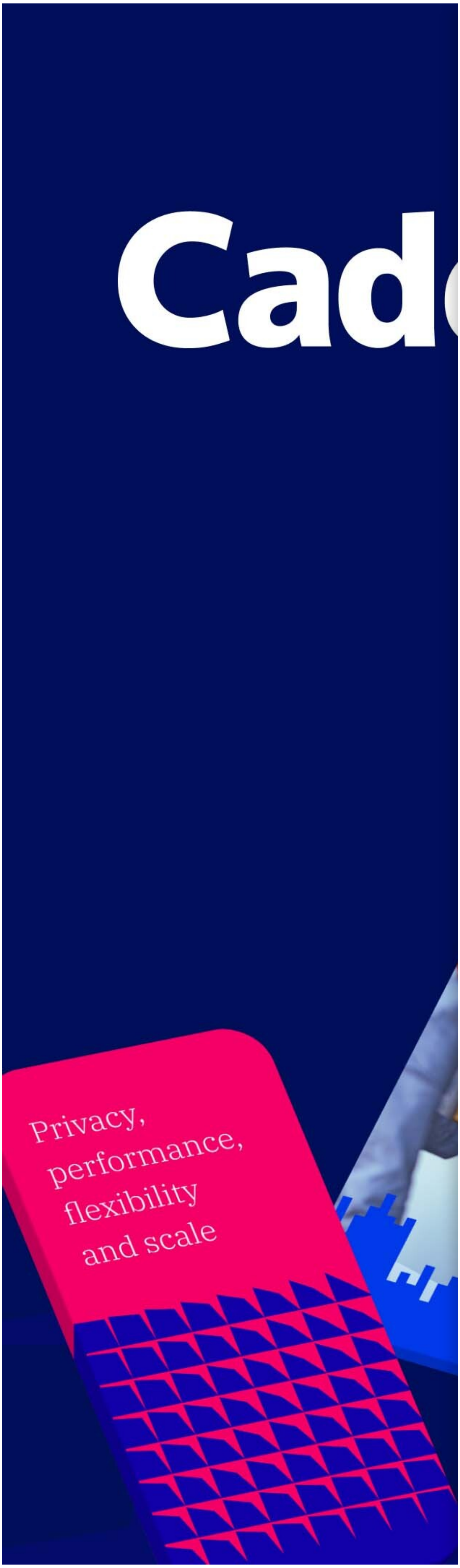
1. On the navigation menu, select **Datasets**.
2. On the **Datasets** page, click the gears icon. The Customize table panel displays.
3. To add a new element to the table, select **Show**.
4. To remove an element from the table, select **Hide**.
5. To reset the table to it's original setup, click **Reset**. The columns return to the default positions.
6. Click **Save Changes**.

7. To return to the default columns, click **Reset**.

## Optional columns

The following columns can be added to the Datasets page:

- **IPs Matched** - Numeric value for the total number of IP addresses associated with the dataset.
- **Matched Rate** - The percentage of records in your uploaded dataset that the platform can successfully identify and link to its own database of users or devices. It measures the overlap between your data (for example, a list of customer emails or addresses) and the platform's reach.
- **Source Records** - The number of records contained in the dataset.
- **Match Key** - The elements that the dataset targets when capturing impressions. For example, postal address, zip code, city, or state.
- **Source Rows** - A numeric value indicating the number of source rows in the dataset file.
- **Last Modified** - The date when the dataset was changed most recently.
- **Date Created** - The date when the dataset was created.
- **Created By** - The email address for the user who created the dataset.
- **Last Deployment** - The most recent date when the dataset was deployed.
- **Audience Builder** - Indicates whether the dataset is available when creating an audience.
- **Deployed** - Indicates whether or not the dataset was deployed.
- **Tags** - Lists the tags associated with the datasets. Create tags to connect datasets that you want to relate and access together.
- **ID** - The system generated identifier for the dataset.
- **Devices** - Numeric value for the total number of devices associated with the dataset.
- **Last Deployed** - The date in MM/DD/YYYY format when the dataset was most recently deployed.

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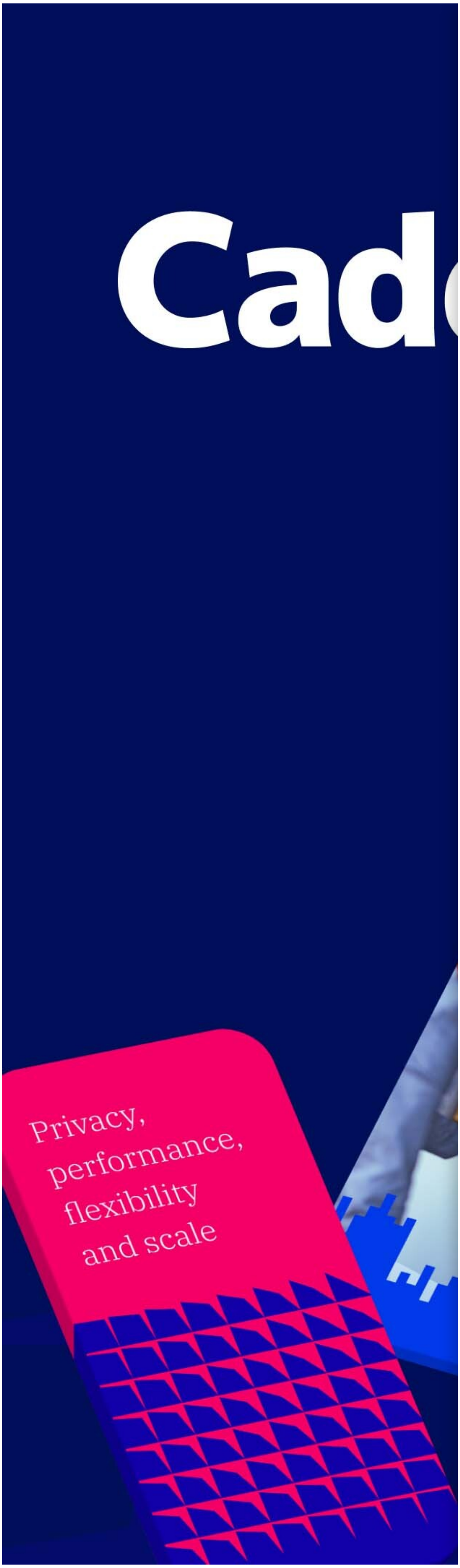


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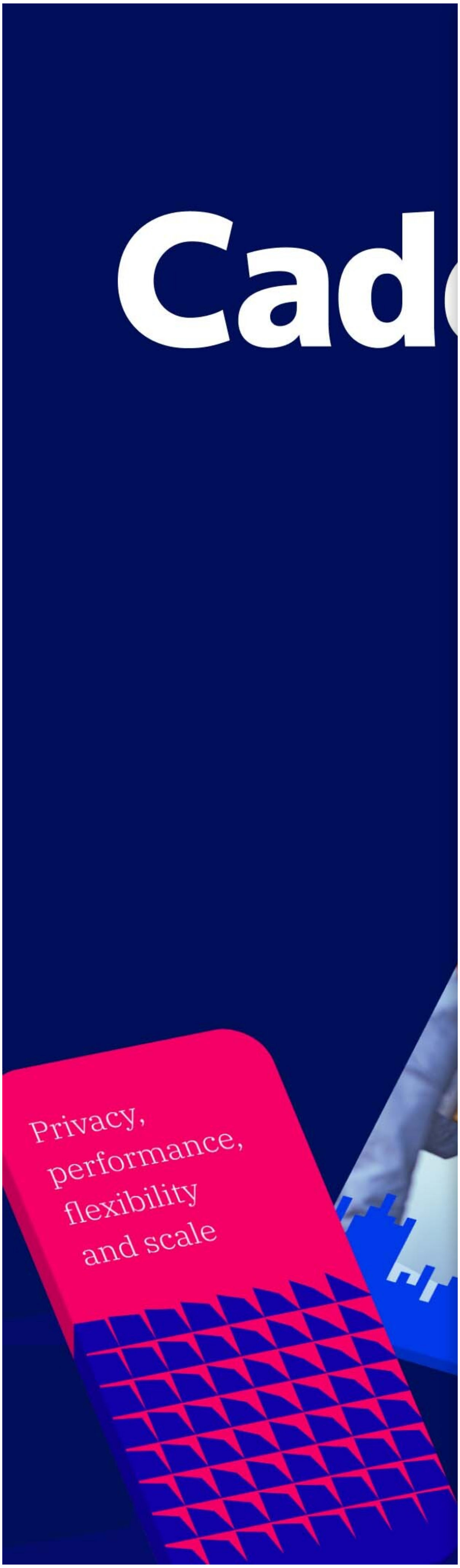


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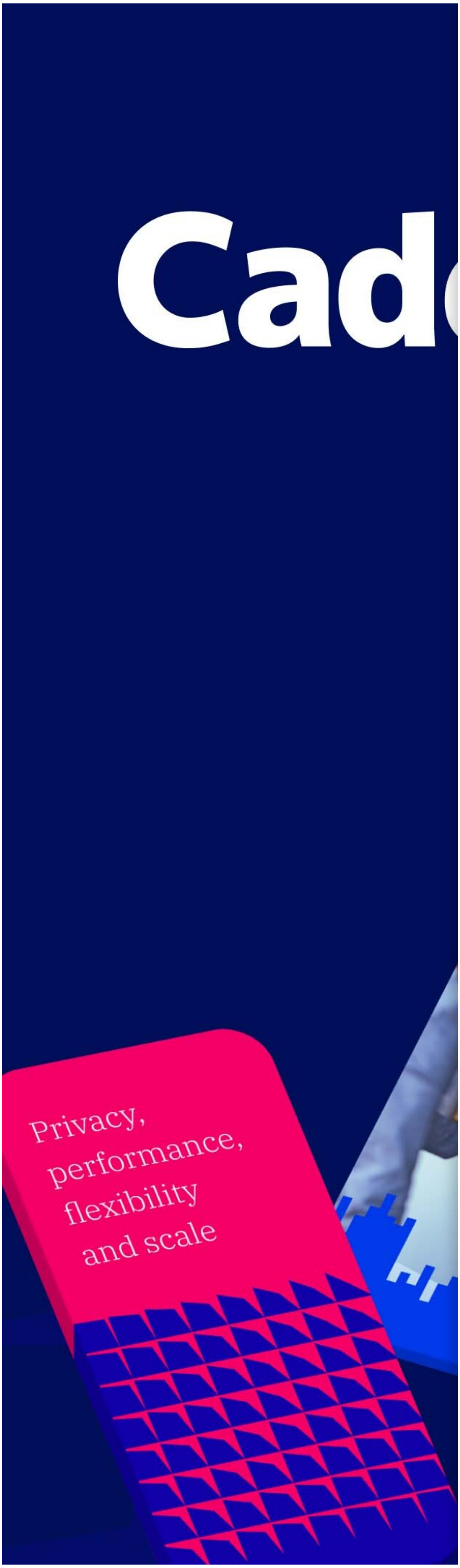


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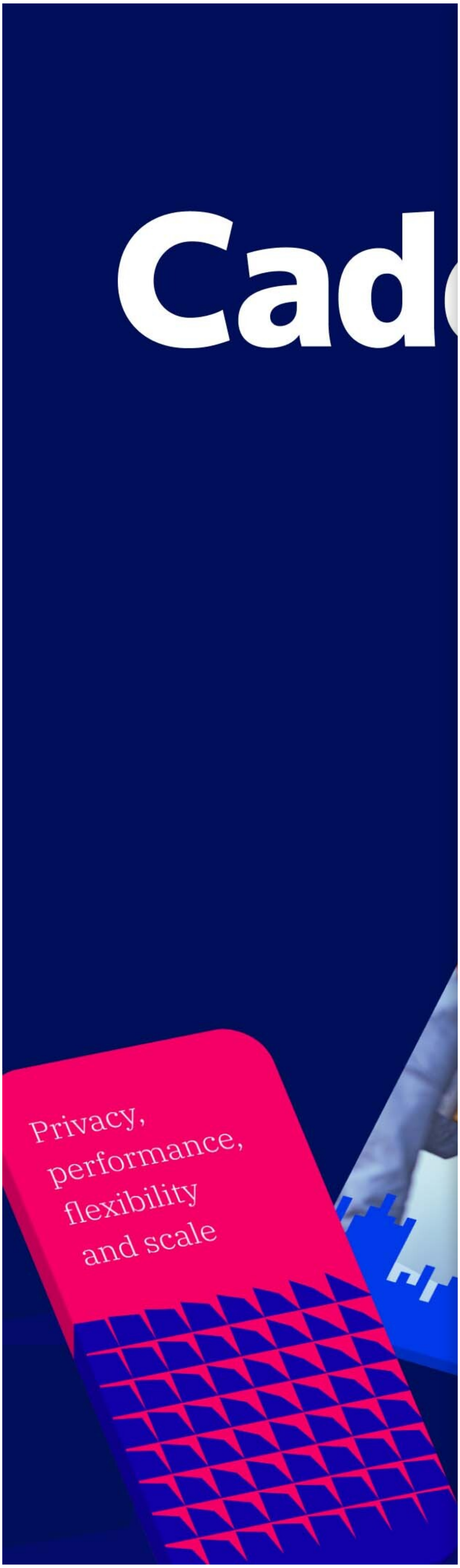


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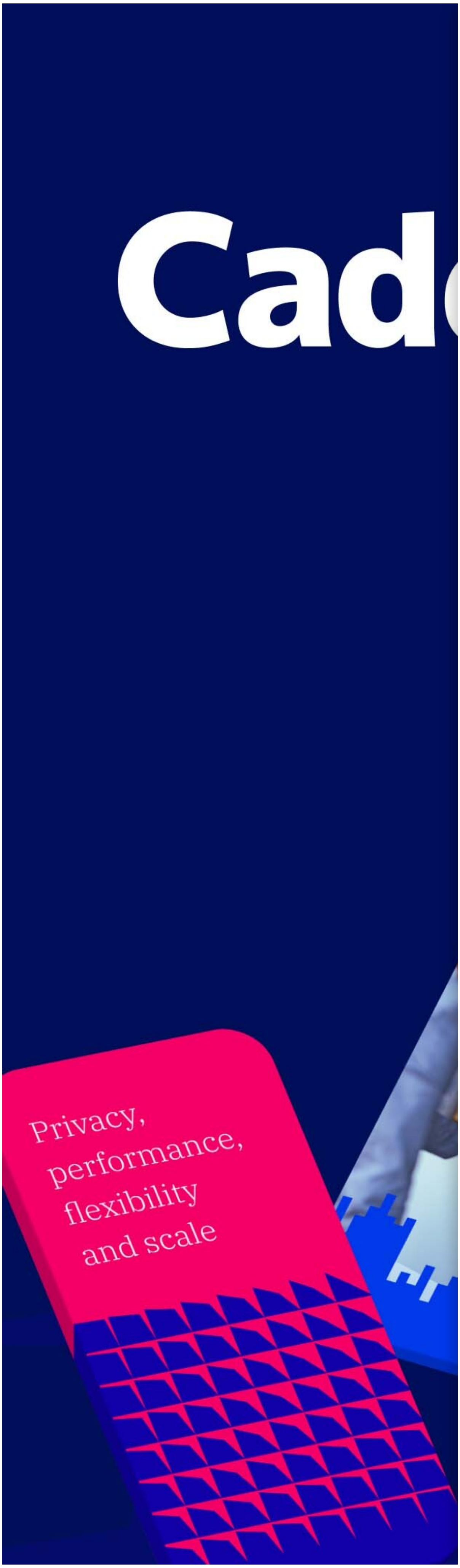


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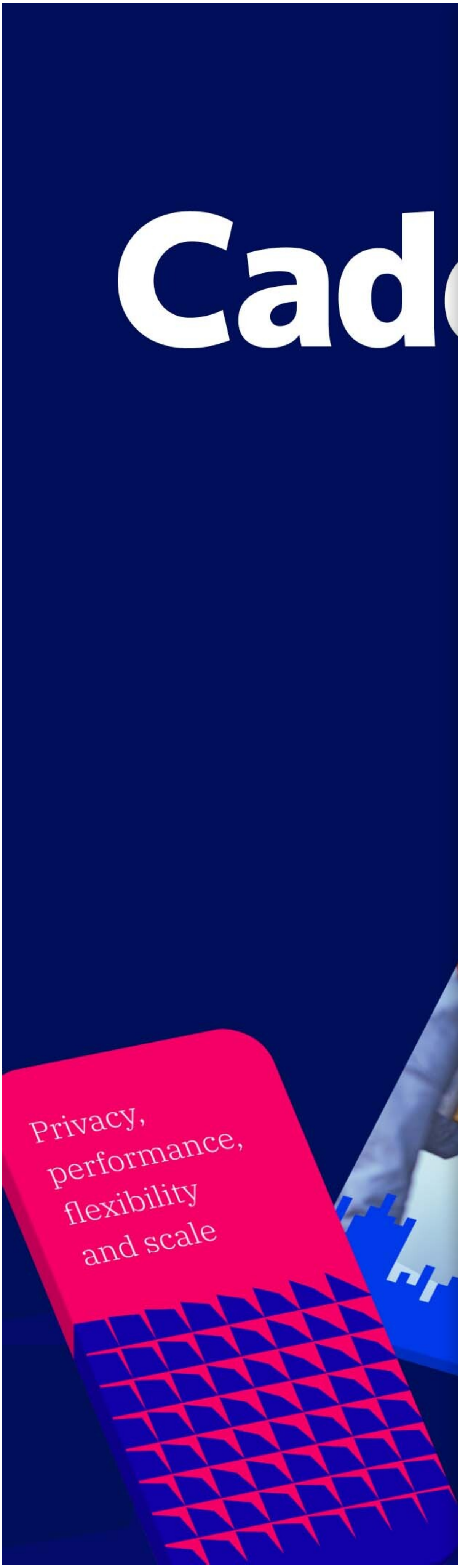


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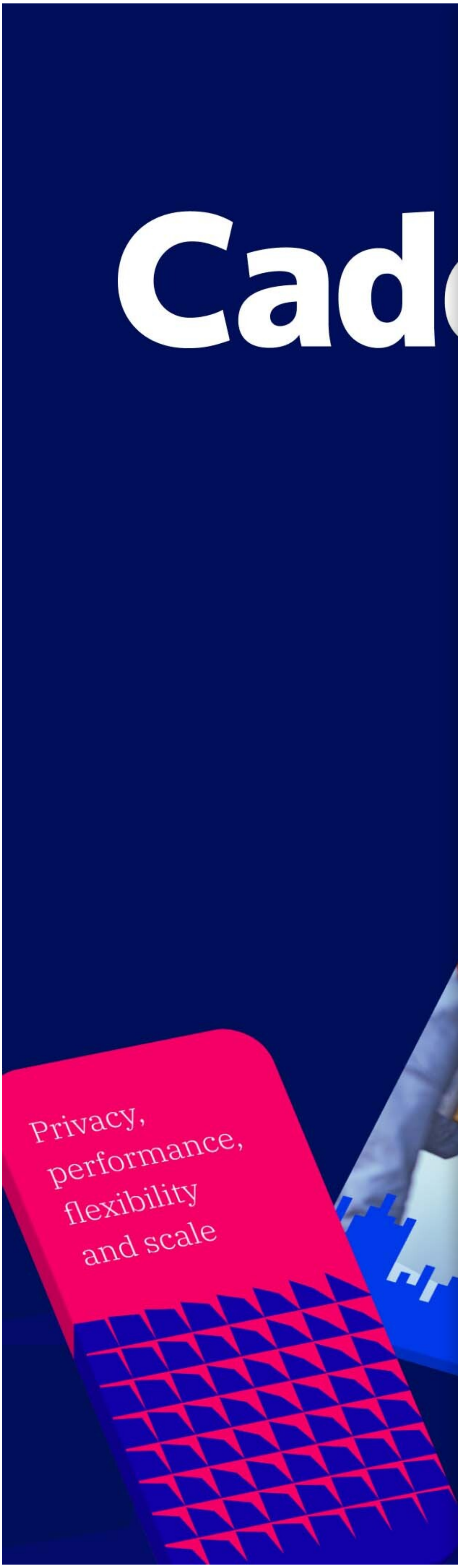


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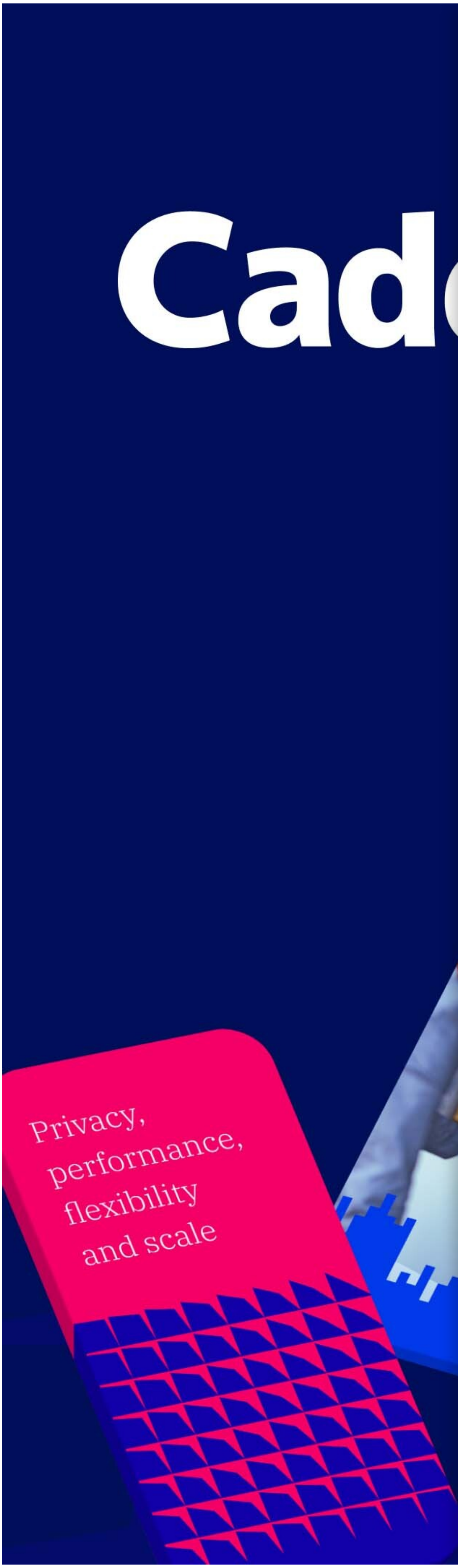


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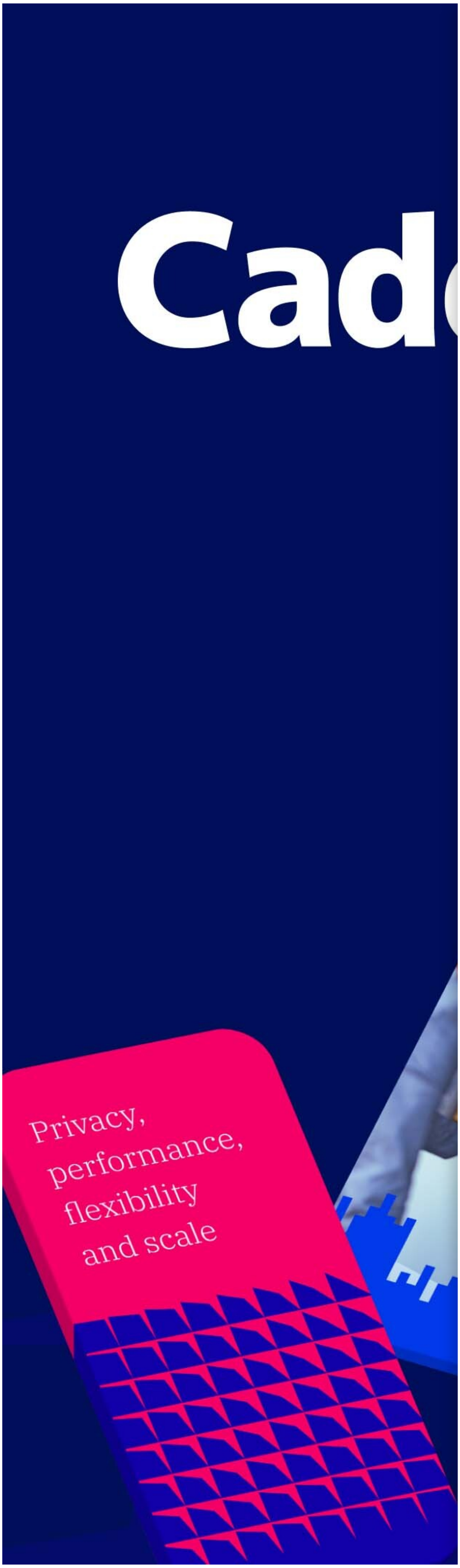


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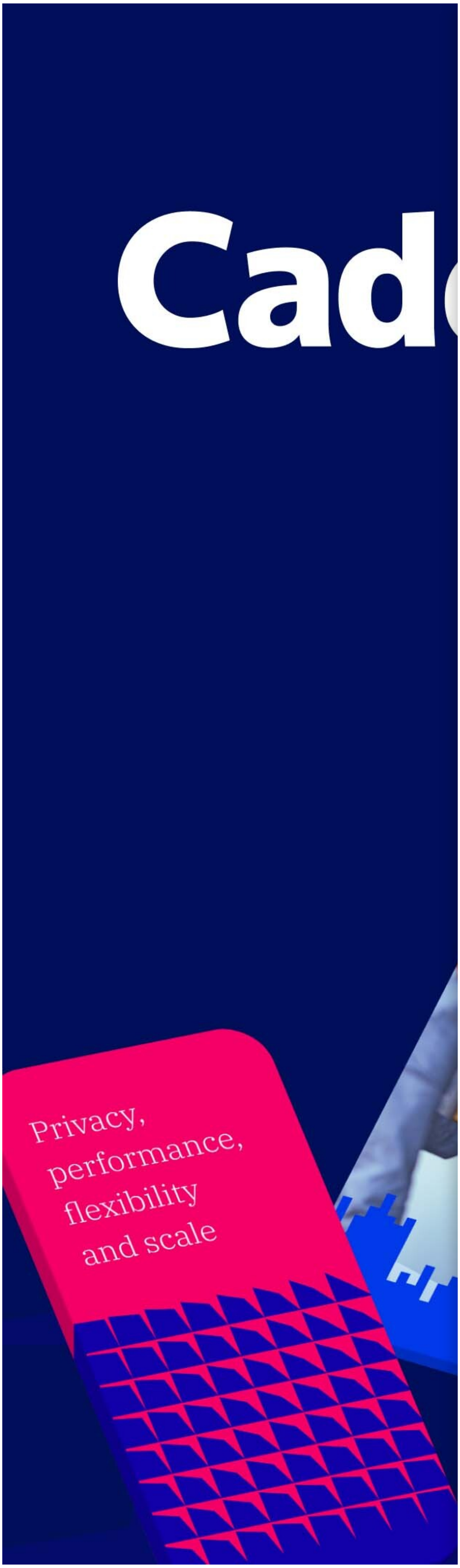


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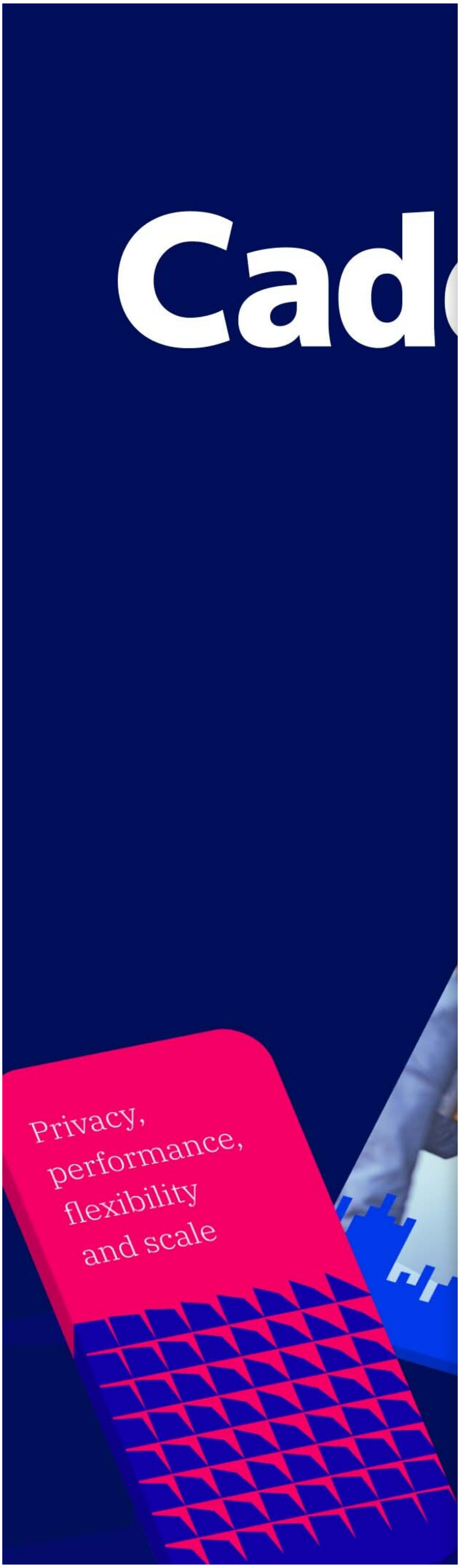


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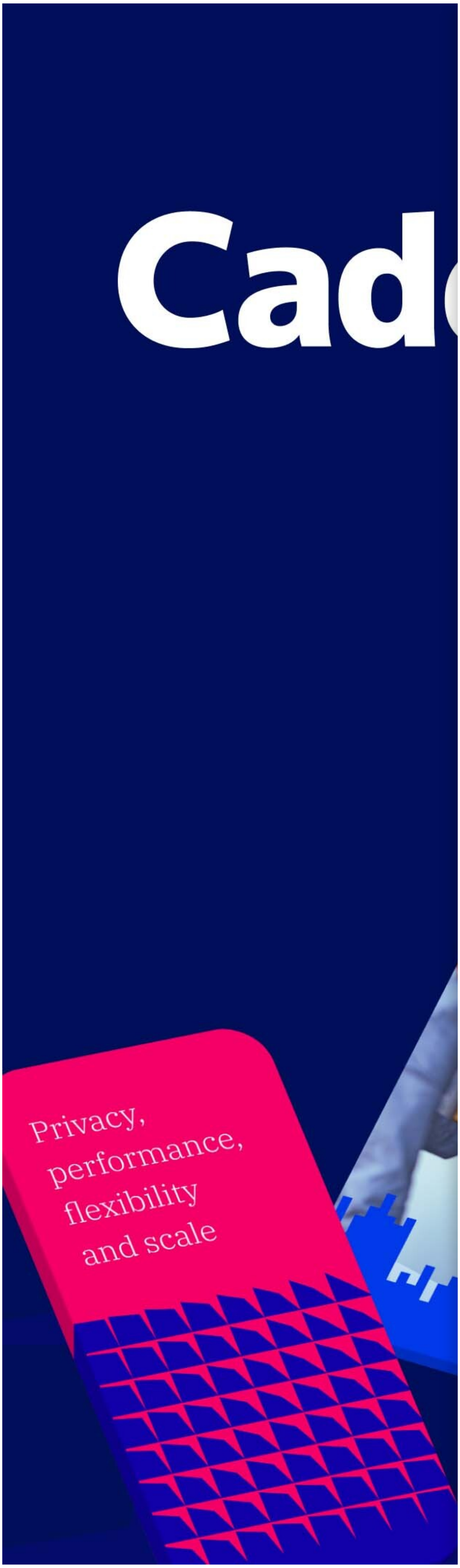


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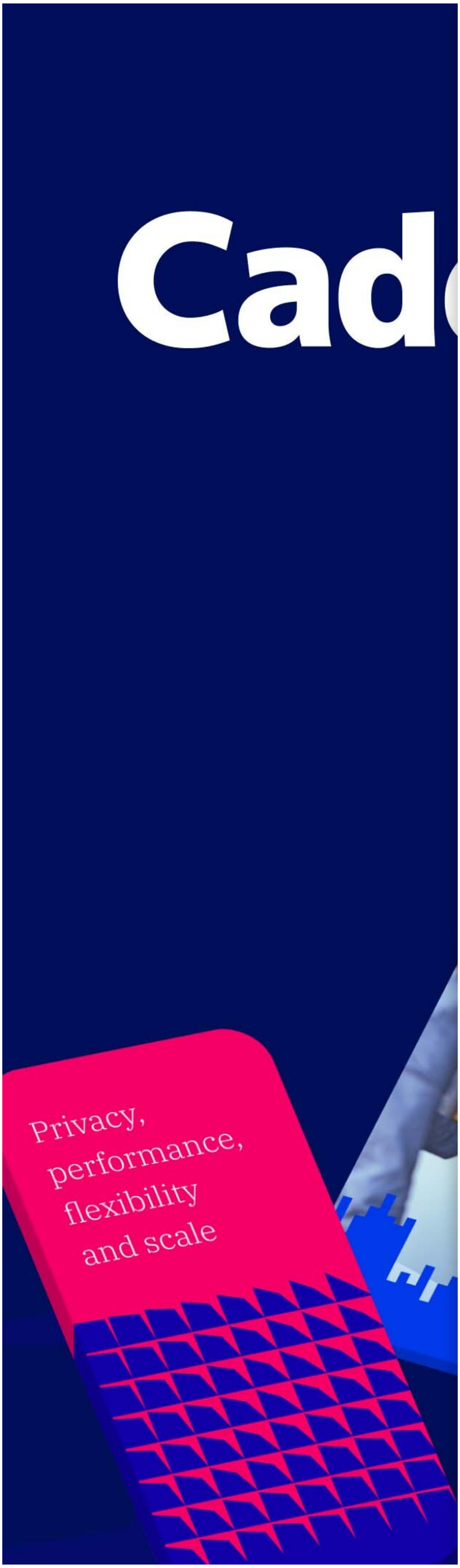


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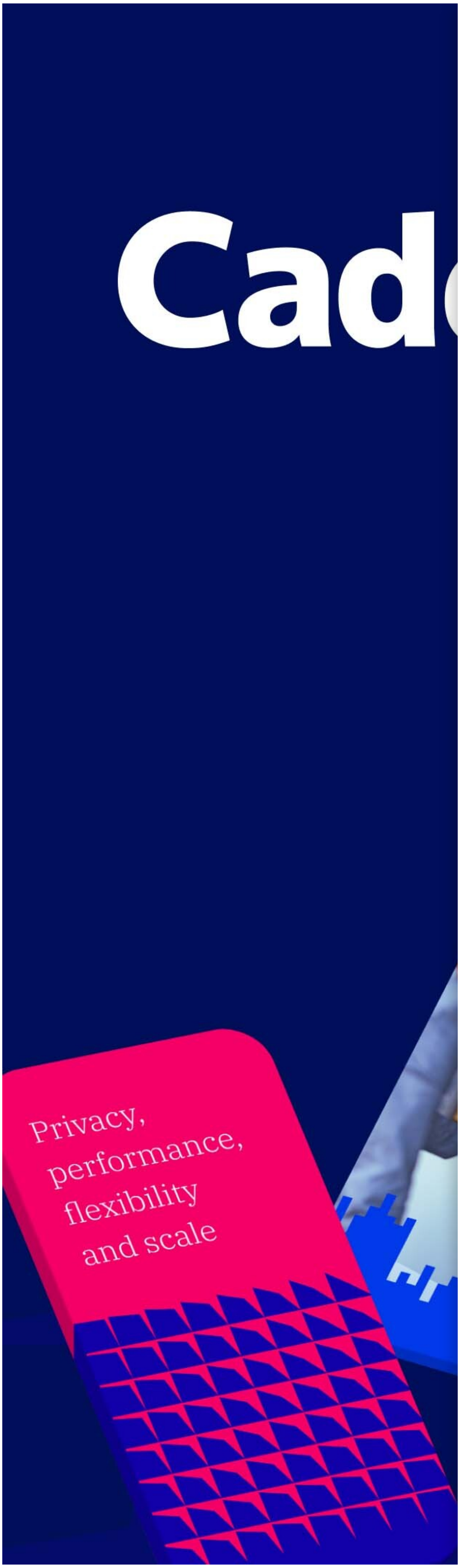


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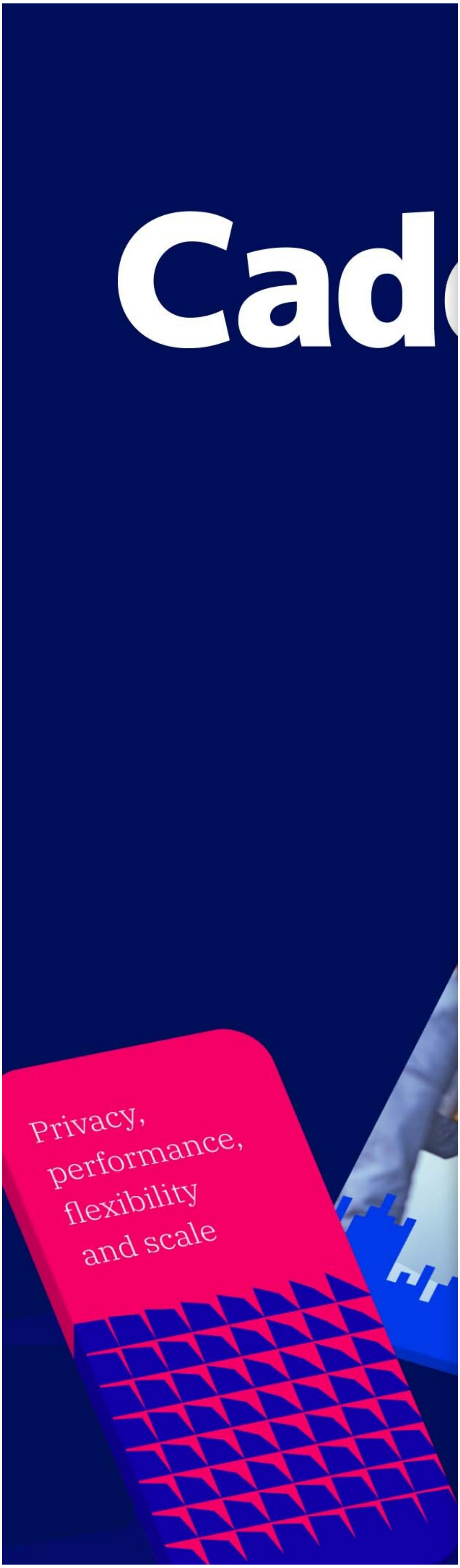


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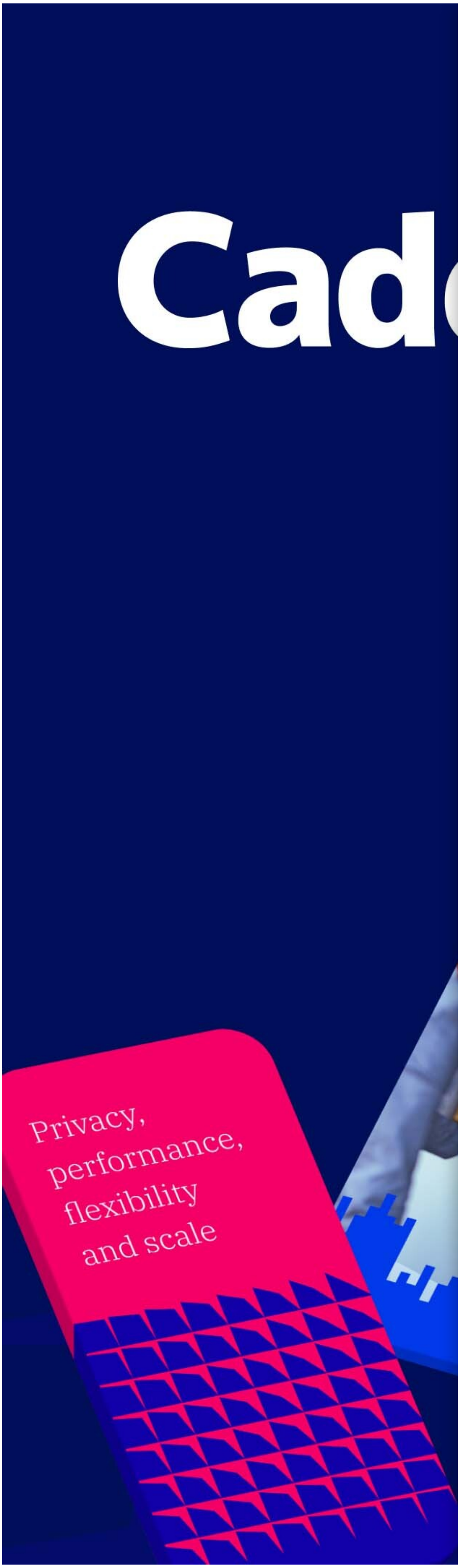


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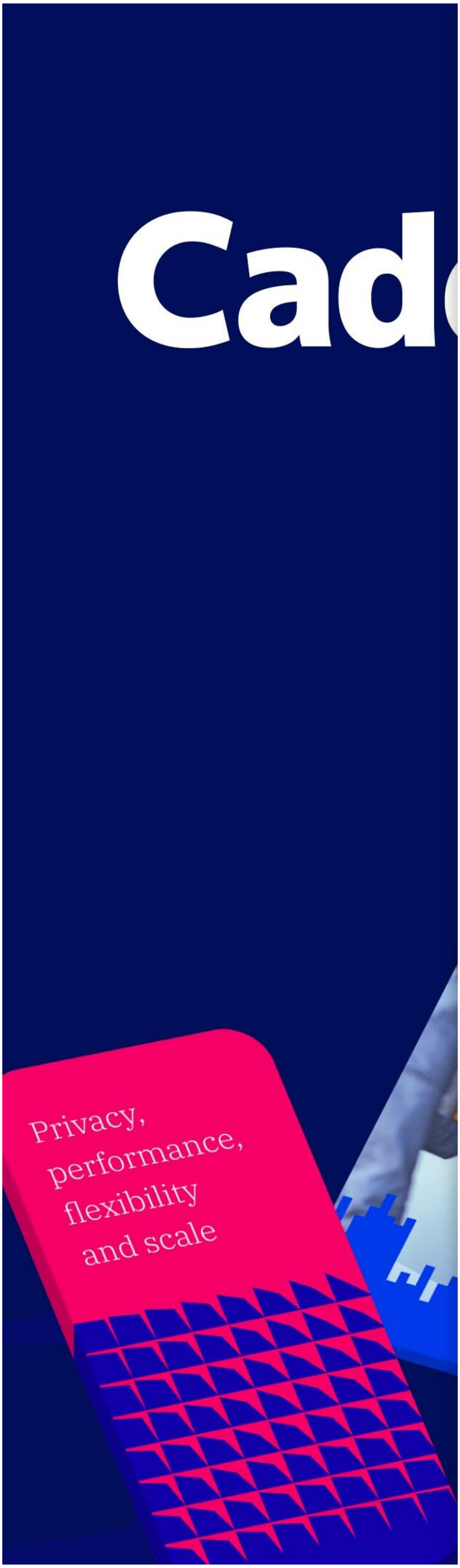


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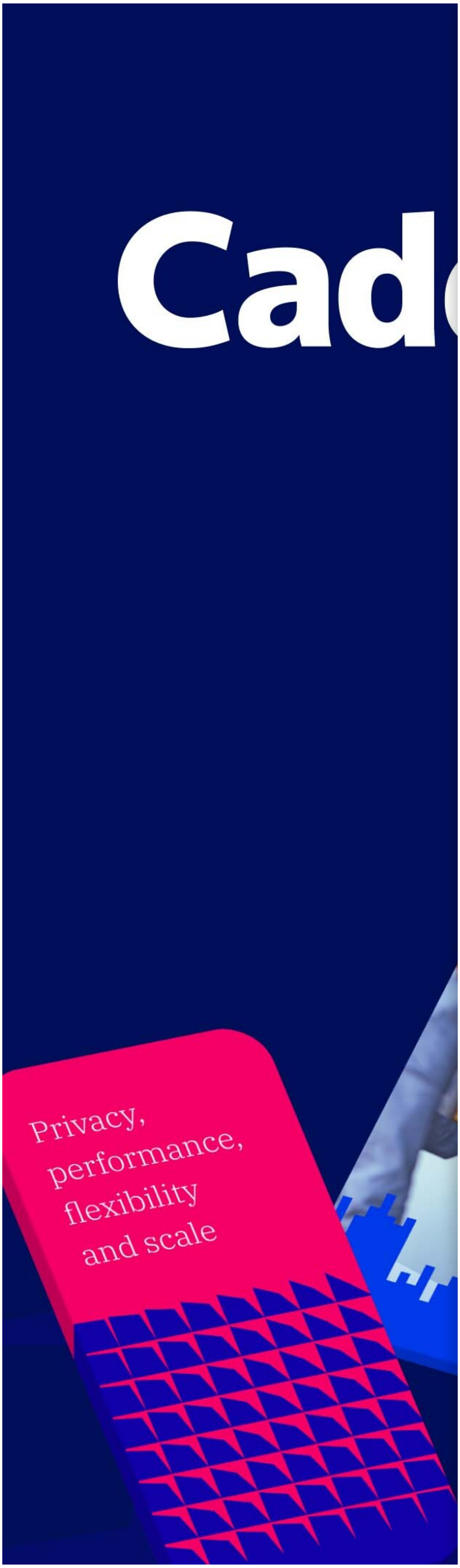


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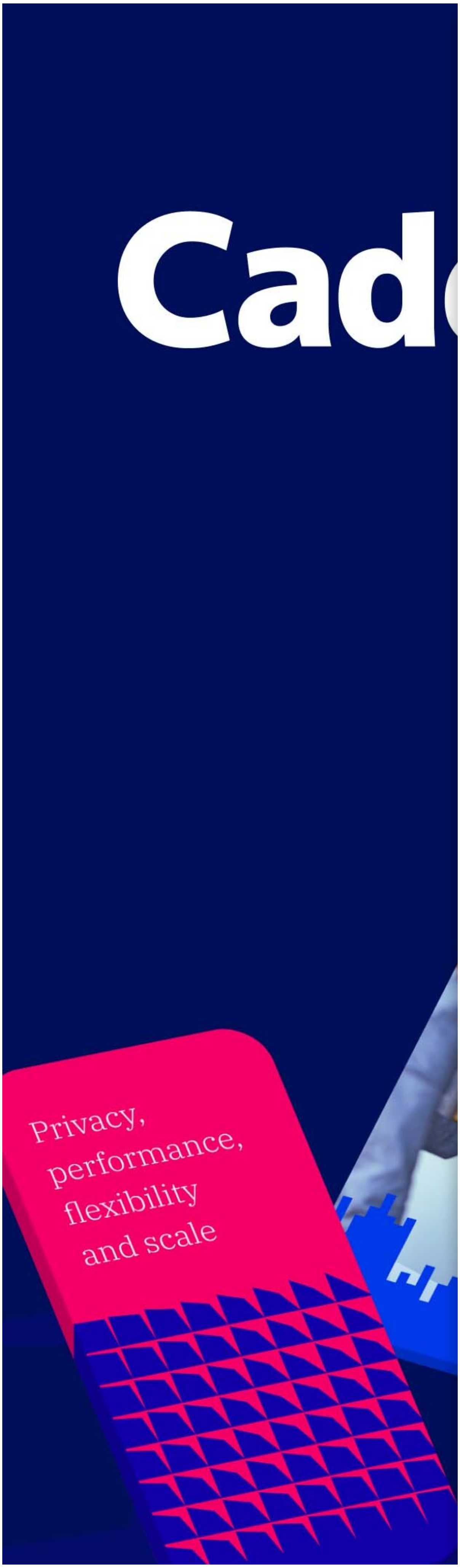


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