



## Documentation

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This integration lets users link Engage audiences to The Trade Desk and transmit Personally Identifiable Information (PII), including email addresses and hashed emails. Users have the flexibility to configure their delivery preferences within Segment.

The Trade Desk destination can only be connected to Twilio Engage sources.



#### The Trade Desk CRM is not compatible with IP Allowlisting

For more information, see the [IP Allowlisting](#) documentation.

## Getting started

### Obtaining credentials from The Trade Desk



Contact your The Trade Desk account manager to sign the UID POC contract before you activate audiences on The Trade Desk. Afterwards, The Trade Desk will grant permission and share your advertiser ID and secret key for configuring your

destination.

Before you begin, generate a [long-lived token](#) on [The Trade Desk's Developer Portal](#).

## Connecting The Trade Desk CRM

1. Go to the Segment web app and navigate to **Engage > Audiences**. Ensure you are in the Engage space you intend to use with The Trade Desk. Choose an existing Engage Audience or create a new one. This is the audience you plan to send to The Trade Desk.
2. Access **Engage > Engage Settings** and click on **Destinations**. Confirm that you are in the correct Engage space.
3. Search for **The Trade Desk CRM** and select the destination.
4. Click on **Configure The Trade Desk CRM**.
5. On the **Select Source** screen, your Engage space should already be selected as the source. Click on **Confirm Source**.
6. Generate a [long-lived token](#) on [The Trade Desk's Developer Portal](#).
7. After authenticating, enter your Authentication Token and Advertiser ID from your [The Trade Desk's CRM Data Platform API](#) account. Enable the destination by toggling **Enable Destination** and click **Save Changes**.
8. Navigate to the **Mappings** tab, click **New Mapping**, and choose **Sync Audience to CRM Data Segment**.
9. In the **Select mappings** section, input the PII Type and maintain other defaults. Click **Save** and toggle to enable the mapping.
  - **Create only one mapping for every instance.**
  - If any of the emails stored in your Engage audience are already in a hashed format, please specify the PII type as `Hashed Email`. Failure to do so results in The Trade Desk categorizing the hashed records as invalid during the ingestion process.
10. Return to **Engage > Audiences** and select the audience from Step 1.
11. Click **Add Destinations** and choose The Trade Desk CRM destination you just created. In the settings that appear in the side panel, enable the **Send Track** option and **do not** alter the Audience Entered/Audience Exited event names. Fill out the audience settings, specifically the region field, with the geographical region of the CRM data segment based on the origin of the PII (US, EU, or APAC). Click **Save Settings**.

Setup is now complete, and the audience starts syncing to The Trade Desk.

To sync additional Audiences from your Engage space, create a separate instance of The Trade Desk CRM Destination.



### Mapping tester availability

The Mapping Tester isn't available for this destination. Since this destination requires batched events for activation, testing can only be performed end-to-end with a connected source.


## Destination Settings

SETTING	DESCRIPTION
Advertiser ID	<i>Required.</i> The platform ID of the advertiser for which to retrieve the status of the specified CRM data segment.

SETTING	DESCRIPTION
Authentication Token	<i>Required.</i> Your long-lived Trade Desk authentication token. Please see The Trade Desk's <a href="#">authentication documentation</a> for information on how to generate a long-lived API Token via the Manage API Tokens in the developer Portal.

## Available Actions

Build your own Mappings. Combine supported [triggers](#) with the following The Trade Desk Crm-supported actions:

**Mapping limits per destination**  
Individual destination instances have support a maximum of 50 mappings.

### Sync Audience to CRM Data Segment

#### Sync Audience to CRM Data Segment




Drop users into the given CRM Data Segment

Sync Audience to CRM Data Segment is a **Cloud** action. The default Trigger is: `event = "Audience Entered"`

Click to show / hide fields

FIELD	DESCRIPTION
External Audience ID	Type: <code>STRING</code> The CRM Data ID for The Trade Desk Segment.
PII Type *	Type: <code>STRING</code> The type of personally identifiable data (PII) sent by the advertiser.
User Email	Type: <code>STRING</code> The user's email address to send to The Trade Desk.
Enable Batching	Type: <code>BOOLEAN</code> Enable batching of requests to The Trade Desk CRM Segment.
Event Name	Type: <code>STRING</code> The name of the current Segment event.
Batch Size	Type: <code>NUMBER</code> Maximum number of events to include in each batch. Actual batch sizes may be lower.

## Limitations

-  An audience must have at least 1500 unique members; otherwise, the destination fails, and the data won't sync.
-  Audience attempts to sync once per day.
-  Audience sync is a full sync.

## FAQs

### How is the CRM Segment Created?

When connecting your audience from your Engage source to an enabled TTD destination, there's no need to manually create CRM Segments. Segment automatically generates a CRM Segment in your TTD account, mirroring the name of the audience linked to the TTD instance.

## How does TTD handle emails that don't already exist?

The CRM endpoint maps email addresses into UID2s. If it's a valid email address, TTD generates a UID2 for it. However, if there are no bid requests coming in from the SSP with the specific UID2, then the ID would exist in the segment until it hits the TTL and won't be used when purchasing an impression.

## What PII format should I send?

The Trade Desk recommends transmitting personally identifiable information (PII) in its original, non-hashed format. TTD's preference is to handle the hashing of any PII, like emails, on their end. However, if your data already contains any hashed emails, please ensure you are normalizing and hashing the emails by designating the PII type as `Hashed Email`, in line with TTD's [PII Normalization and Hash Encoding](#) documentation.

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