Guideline

Guideline Planning Enhancements FAQ

Your most asked questions and answers on Guideline Planning enhancements, including our **Read-API and Integrations**

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Read-API

What can I extract with the Guideline Planning API?
Our Read API provides a fast, efficient, and safe mechanism for extracting plan and performance data from Guideline platforms, to be stored in your own data warehouse for analysis and modeling. It is another tool for data extraction, in addition to our existing views, scheduled tasks, and custom extracts.

What Read-API endpoints are available?
The below list is a sample of the endpoints available at launch. Additional endpoints will be added as we iterate on the offering.

- Audience
- Buy Authorization Version
- Campaign
- Client
- Country
- Creative
- Currencies
- Demo
- Flexibility Rule
- Flight
- Funding Source
- Location
- Market
- Media Type
- Plan
- Plan Type
- Product
- Resource Set
- Secondary Demo
- Unit
- Vehicle
- Version

Can I write into the API?
No, this current version of the API is read-only, and does not allow for data creation or delivery to the Guideline Platform (yet).

Is there an implementation guide?
Yes, users will need to build Guideline Read API specifications, which will be provided.

Will any changes to my SSO set up be required?
No changes are needed.

What is the difference between the Data Export API and Referential Data API?
The Data Export API returns the data that has been input into a Plan within the Guideline Planning application. This data is broken down to the daily level and includes Guideline IDs for Properties (ex. MediaTypes, Vehicles, Products, etc.).

The Referential API returns the Guideline IDs and human-readable names and associated metadata for the various properties that are used within Plans (ex. MediaTypes, Vehicles, Products, etc.).

Does the Read API provide aggregated data?
The Read API does not provide any pre-aggregated data. The data provided is raw data that is to be stored in the client's data lake/warehouse and subsequently aggregated via their own BI tool.

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Read-API

Are Custom Fields available via the Read API?
Currently, Custom Fields are not available via the Read API. There is a refactoring that is being completed before our team will make this available. Custom Fields are expected to be available for testing by API users by End of 2024Q3.

How are API requests counted?
Any single request is counted against your quota. If a request returns paginated data, each page request counts as an individual request.

What is our maximum number of API tokens or calls?
This is dependent on your agreed upon contract. Please see the standard rate card from your Account Executive.

How do we access our Key/Token?
Once a contract is signed, we'll grant you a user with API access. This will allow the user to log into our UI and generate the API Token needed to use the Read API.

Is there a Dev/Staging environment that we can access?
Yes, we have a testing environment that we can provide access to so that you can get familiar with the API. Please note that this environment may have different rate limits than you would experience in Production and will not contain any actual client data.

How can we limit the amount of data we request via the Data Export API?
There will be a handful of helpful data points that will allow you to refine your query against the system including: inactive, isDeleted, last updated, planType, start and end dates.

Currently, the Data Export only has 2 required parameters (startDate and endDate) that can limit the amount of data retrieved and returned in a single request. More details on how to properly filter for these fields in your queries will be provided at a later date.

What format will the response be in?
It will be in JSON format.

Guideline Planning Enhancements FAQ

Integrations

Why should I activate Integrations for my Planners?
Third-party integrations allow clients to connect their selected partners to Guideline Planning. This provides you with valuable insights into daily planned vs actuals in a single platform. Automation of this activity reduces manual work on the client side and improves the cadence in which actuals are available to Guideline Planning users, saving work-hours and driving better outcomes with faster insights.

When are Integrations available?
Our first 20 Integration partners are live as of April 2024, with more to come. In order to activate any Enhancements, you must upgrade to Guideline Planning.

- Google Ads
- Facebook Ads
- IAS
- Google DV360
- Google Search Ads 360
- Google Campaign Manager
- Google BigQuery
- The Trade Desk
- DoubleVerify
- Instagram Business
- TikTok Ads
- Snapchat
- Pinterest
- LinkedIn Ads
- Amazon Advertising
- Amazon DSP
- Criteo Marketing Solutions / Retail Media
- Adform

What is the full list of fields available to map within the third-party integrations?

- Acquisitions
- Ad Serving
- Circulation
- Clicks
- Credit
- Engagements
- Frequency
- Gross Cost
- GRPs
- Impressions
- Inserts
- Installs
- Leads
- NEP
- Net Cost
- Net Credit
- Production Cost
- Rate Base
- Reach
- Rich Media
- Spots
- TRPs
- Views
- Visits

How does Guideline map the data from the third-party vendors to the measures listed above?
Guideline Planning flights are connected to the desired vendor level granularity (e.g. campaign, placement/creative, etc.) within the 3rd party platform. You will need to complete this mapping at the Flight level upon the initial release.

Is there a taxonomy mapping we can use?
Yes, this will be made available in our tech specs.

Guideline Planning Enhancements FAQ

Integrations

What implementation will be needed on my part?
Once you have selected your partners, you will need to authorize Guideline access, and finally complete your mapping. An automatically generated email will be sent from Guideline that will include a link to the partner we are connecting to. This will require proper identification of Admin level users on the client side.

Who has access to client login information? Where is it stored?
Client logins are entered in via a secure portal. A link to this portal will be provided via verification email that instantly verifies access for Guideline for the selected Third-Party Connector. At no point are client login credentials/information exposed to employees at Guideline. This means that Guideline only has the ability pull data from the selected vendor to map the appropriate fields and load client third-party data into Guideline Planning.

How much historical data will be available to me via the third-party integrations?
You will have access to year-to-date data for every integration that they have signed up for.

What time zone is the third-party data being provided in?
All data is in UTC except Amazon data which uses PST.

How can I troubleshoot data that looks incorrect?
Due to the origin of the data, you will need to reach out to the platforms (e.g. FB, Google, IAS) directly to have them correct any data that appears inaccurate.

How often is data updated in Guideline Planning?
Data will be processed based on availability from the partner, and up to a daily cadence.