Bankrate's Advertising Platform
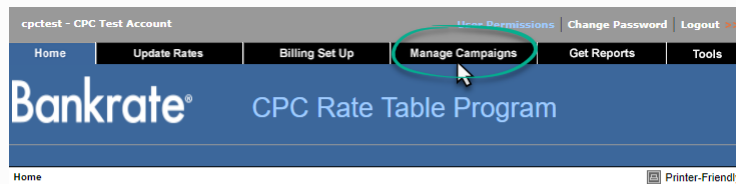
User Guide

User Guide Contents

HAVE A QUESTION?
Please visit our Support Center for FAQs or to contact our dedicated Client Support Team.

Getting There

1. Log in to [Bankrate's Advertising Platform](#).
2. Select the Manage Campaigns tab.
3. Click Get Started.
4. Click the Bankrate's Advertising Platform (BAP) link.

Tip: continue to manage your cost per call business by clicking the phone icon.

Account Dashboard

A quick glance graph shows your total spend and remaining balance based on the date range selected.

Use the date range drop down to adjust the time period of the graph.

Daily reports can be scheduled for email delivery.

At the bottom of the page, you can create and manage your Campaigns.

Campaign Manager

A quick glance graph shows your activity and spend for the date range selected.

Use the date range drop down to adjust the time period of the graph.

Campaign details

Daily reports can be scheduled for email delivery.

At the bottom of the page, you can create and manage the Ad Sets within this Campaign.

There is a snapshot of data for the current day and the date range selected in the section above.

Campaign Structure: Best Practices

Bankrate's recommendation for making the most out of the targeting capabilities:

- All of your mortgage rate table business can live within one Account.

- If you participate in CPC and CPL, set up a Campaign for each. Breakout further by setting up purchase and refinance Campaigns each for your CPC and CPL business. Four Campaigns in total.

- Within each of those Campaigns, set up an individual Ad Set for each applicable state in which you are licensed.

Account	Account
Campaigns	Purchase Leads / Purchase Clicks / Refinance Leads / Refinance Clicks
Ad Sets	Arizona PL / Georgia PL / Arizona PC / Georgia PC / California RL / Florida RL / California RC / Florida RC
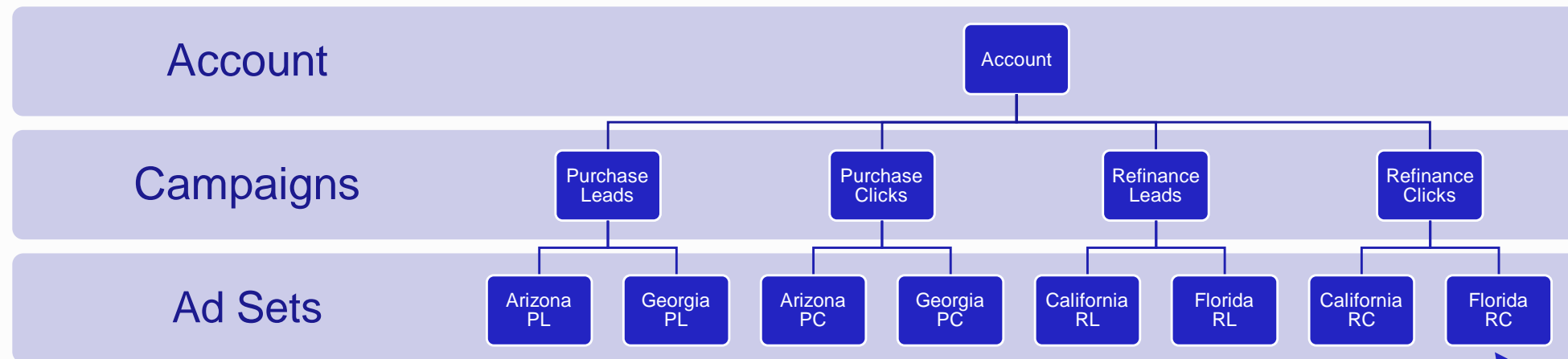
Tip: Jumbo and conforming targets are also available, if you want to further segment your Ad Sets.

Set Up: Campaigns

Structuring your account begins at the Campaign level.

Create separate Campaigns that align with your business needs. You'll be able to turn an entire Campaign on or off with the flip of one switch. You can also set a budget for the entire Campaign.

1. On the Dashboard, click Create a Campaign. If this is your first time logging in, you'll be prompted with "Let's Get Started."

2. Give your Campaign a unique name. Be specific so you can identify this campaign easily in the future. For example: Jumbo Purchase Leads or All Refinance Clicks.

3. Select the Ad Product you wish to assign to this Campaign: Cost per Click or Cost per Lead.

4. Choose a Budget Type: Open (no limits), Daily (set a max spend by day), Weekly (set a max spend for each specific day of week).

5. Now you can create Ad Sets!

Set Up: Ad Sets

Create Ad Sets within each Campaign to target specific audience segments.

Each individual Ad Set can have its own budget. It can also be paused, even if its parent Campaign is live.

1. On the Dashboard, select a Campaign and click Create an Ad Set.

2. Give your Ad Set a unique name. Be specific so you can identify this campaign easily in the future. For example: FL Purchase Leads or Southeast Conforming Clicks.

3. Choose the state(s) you want to include and the Product Type. If you used states, regions or product types in the name of this Ad Set, be sure to select the matching options in this step.

4. Choose a Budget Type and enter a Start Date.

Tip: Start & End Dates allow you to set a different budget for the identical Ad Set during specified time periods. So you can plan ahead for holidays or upcoming team training events without having to make the change manually. Just remember to name your Ad Set accordingly, i.e. Thanksgiving Week FL Refi Leads.

Set Up: Ad Set Preview

Double check your set up once it's complete.

This summary shows the name and targeting options you included for this particular Ad Set.

This list lets you know which loan products you are participating in, and which ones you do not have rates for. If you see "Rate Not Found" for a product you want to include in your Ad Sets, check with your pricing engine to make sure it's set up.

Set Up: Copying Campaigns & Ad Sets

Quickly set up a similar Campaign by creating a copy and making changes from there.

You've already set up an entire Campaign for your purchase clicks, and now want to create a similar Campaign to drive refinance clicks in the same states.

1. Simply copy the original Campaign.

2. Rename the Campaign accordingly and decide if you want to copy all of the Ad Sets or only the active ones.

3. Edit your new Ad Sets to meet the product/budget objectives of the new Campaign.

Tip: You can also copy individual Ad Sets by hovering over the icon to the right of their name.
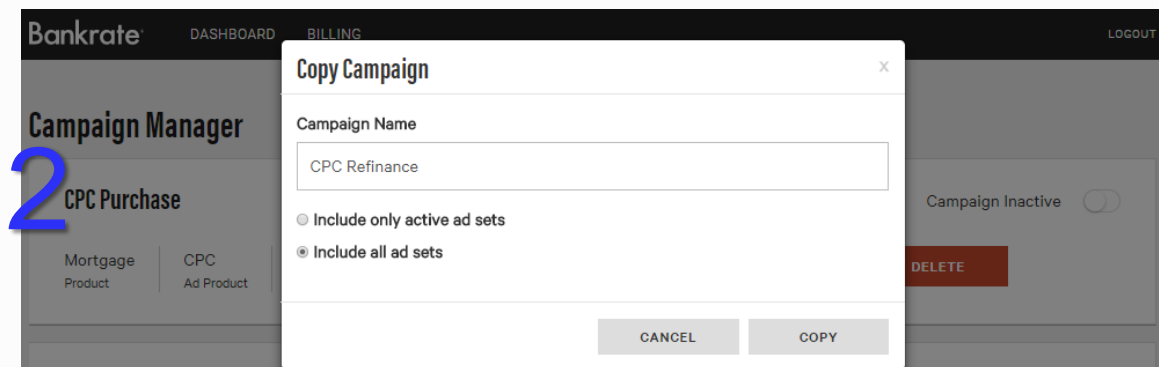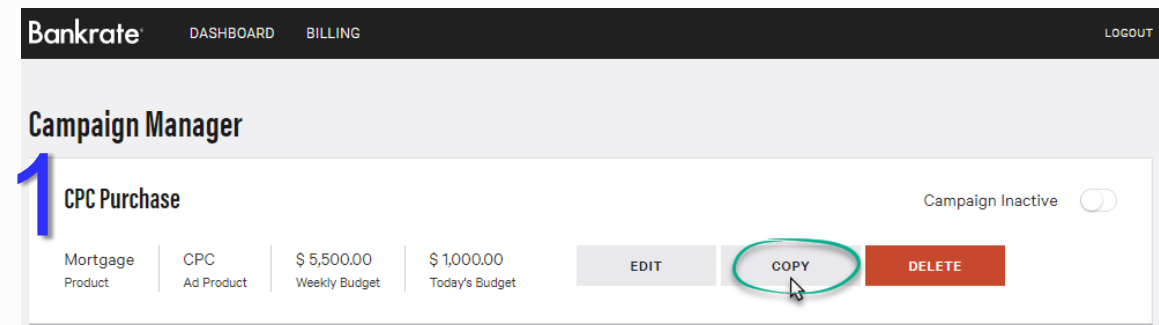
Set Up: Budgeting Options

OPEN

An open Campaign budget will keep the Campaign live on the tables and continue charging your account until all of your account funds are spent.

An open Ad Set budget will keep the Ad Set live on the tables and continue charging the parent Campaign it lives under until that Campaign budget is reached or all of your account funds are spent.

DAILY

Set a cap to limit your spending to the same predetermined amount each day. You can do this at the Campaign and/or Ad Set levels.

This feature can help you pace your click or lead volume evenly.

Once you hit your cap, your rates will come down until your budget resets at 8am ET the following day.

WEEKLY

Set a unique cap for each day of the week at the Campaign and/or Ad Set levels.

This feature allows you to control your click or lead flow to match your staffing capabilities.

Budget & Schedule

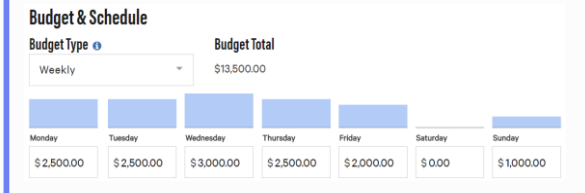| Budget Type		Budget Total	
Weekly	▼	$13,500.00	

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
$2,500.00	$2,500.00	$3,000.00	$2,500.00	$2,000.00	$0.00	$1,000.00

Tip: Closed on Saturdays? Set your budget to $0 on that day and your listing won't show up on the tables at all. Closed on Sundays but want your LOs working leads first thing on Monday mornings? Set a reduced budget on Sundays.

ALLOCATING BUDGETS

You decide the maximum amount you want to spend on each of your Campaigns and Ad Sets. Identify which Campaigns and Ad Sets are the most effective, and allocate greater portions of your budget to maximize your ROI.

Bankrate

Reporting: Snapshots

DASHBOARD

View the total amount spent for your entire account: clicks, leads and calls combined.
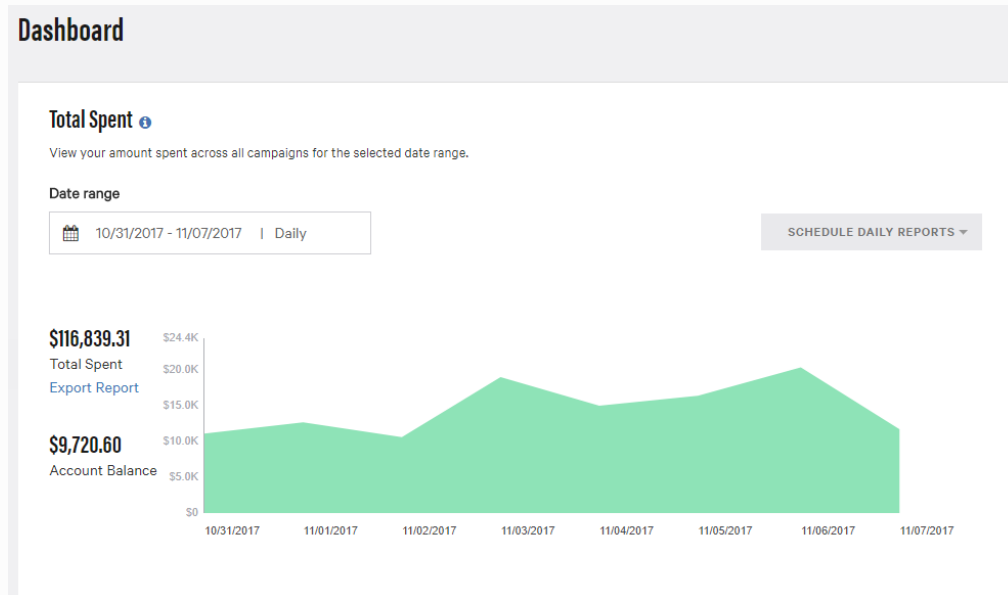
CAMPAIGN MANAGEMENT

View the amount spent in alignment with the activity for that particular campaign: clicks or leads.

Reporting: Details

EXPORT

Use the Export Report link or Schedule Daily Reports button to access detailed reports. You will receive a .csv file via email within minutes of your request.
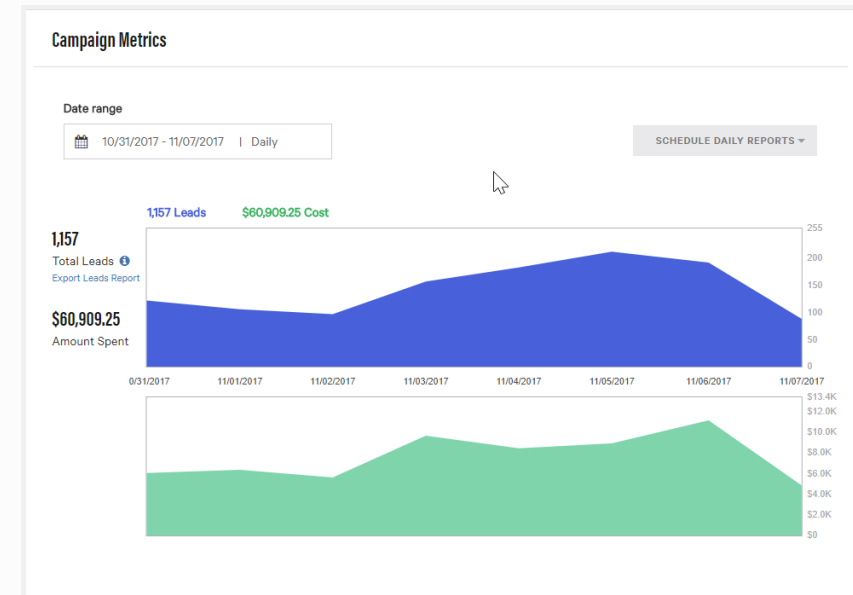
ANALYZE

Receive a raw data file that you can filter, sort and pivot on your own. Capture Bankrate's Lead ID in your CRM/LOS to tie these metrics to your post-lead conversion data and identify efficiencies that boost your ROI.

Event Date	Campaign Name	Ad Set Name	Event Hour (Eastern Time)	Day Of Week	Event Type	City	State	Product Type	Product Name	Loan Amount	Device Type	Total Cost	Lead ID
10/31/2017	CPL - Refinance	Virginia - Refi	10	3	Lead	Reston-Manassas	VA	Mortgage Loans - refi	20 yr fixed-0 pt refi	$ 370,000.50	Desktop	$ 133.03	br25490301509460849746lid
10/31/2017	CPL - Purchase	New Jersey - Purchase	10	3	Lead	Cherry Hill	NJ	Mortgage Loans - purchase	30 yr fixed-0 point	$ 360,000.40	Desktop	$ 118.78	br15037115094601430971id
10/31/2017	CPL - Purchase	Pennsylvania - Purchase	10	3	Lead	Allentown - Bethlehem	PA	Mortgage Loans - purchase	30 yr fixed-2 point	$ 184,000.40	SmartPhone	$ 15.53	br19124221509461690465lid
10/31/2017	CPL - Refinance	Ohio - Refi	11	3	Lead	Toledo	OH	Mortgage Loans - refi	30 yr fixed-2 pt refi	$ 45,000.50	SmartPhone	$ 5.42	br95667961509462208764lid
10/31/2017	CPL - Refinance	Texas - Refi	11	3	Lead	Houston	TX	Mortgage Loans - refi	30 yr fixed-1 pt refi	$ 190,000.50	SmartPhone	$ 86.98	br59210861509462235035lid
10/31/2017	CPL - Purchase	Nebraska - Purchase	11	3	Lead	Omaha	NE	Mortgage Loans - purchase	30 yr fixed-2 point	$ 136,000.40	Desktop	$ 85.50	br56256851509462751729lid
10/31/2017	CPL - Refinance	Nebraska - Refi	11	3	Lead	Omaha	NE	Mortgage Loans - purchase	15 yr fixed-0 point	$ 248,000.40	Desktop	$ 118.78	br85495311509462944571lid
10/31/2017	CPL - Purchase	Alabama - Purchase	12	3	Phone	Los Angeles	CA	Mortgage Loans - purchase	30 yr fixed	$ -		$ 38.50	
10/31/2017	CPL - Purchase	Texas - Purchase	12	3	Lead	Houston	TX	Mortgage Loans - purchase	30 yr fixed-2 point	$ 333,000.45	Desktop	$ 118.78	br77330515094600964881id
10/31/2017	CPL - Purchase	Illinois - Purchase	12	3	Lead	Chicago	IL	Mortgage Loans - refi	30 yr fixed-2 pt refi	$ 250,000.50	Desktop	$ 24.45	br61441815094686261550lid
10/31/2017	CPL - Purchase	Alabama - Purchase	13	3	Phone	Los Angeles	CA	Mortgage Loans - purchase	30 yr fixed	$ -		$ 38.50	
10/31/2017	CPL - Purchase	Alabama - Purchase	13	3	Phone	Chicago	IL	Mortgage Loans - purchase	30 yr fixed	$ -		$ 38.50	
10/31/2017	CPL - Purchase	Alabama - Purchase	13	3	Phone	Los Angeles	CA	Mortgage Loans - purchase	30 yr fixed	$ -		$ 38.50	
10/31/2017	CPL - Refinance	New York - Refi	13	3	Lead	Elmira	NY	Mortgage Loans - refi	15 yr fixed-2 pt refi	$ 130,000.50	Desktop	$ 62.25	br95827851509469795876lid

Management: Pause & Resume Activity

HOW TO DO IT

Pausing and resuming your Campaigns and Ad Sets is easy.

1. At the top of the Campaign Manager page for the specific Campaign you want to adjust, switch the Activate button to white and the label will change to say "Campaign Inactive." To resume a paused Campaign, switch it back to green and the label will say "Campaign Active."
2. On the bottom of the Campaign Manager page, flip the Off/On switch to green to activate your Ad Sets individually, and back to white to pause them.

CONSIDER THIS …

You must have at least one Ad Set turned on in order to activate the parent Campaign. The system will notify you if you try to activate a Campaign that has no live Ad Sets.

Management: Editing Campaigns & Ad Sets

HOW TO DO IT

Editing a Campaign or Ad Set will open the original set up page and let you make changes.

1. At the top of the Campaign Manager page for the specific Campaign you want to edit, hit the Edit button.
2. On the bottom of the Campaign Manager page, click the name of the specific Ad Set you want to edit.

CONSIDER THIS …

If you rename a Campaign or Ad Set, your reports will show the new name, even if you pull data from a time period prior to the new name assignment.

Management: Deleting Campaigns & Ad Sets

HOW TO DO IT

The system won't let you make this type of change without checking first.

1. At the top of the Campaign Manager page for the specific Campaign you want to delete, hit the red Delete button on the right.
2. On the bottom of the Campaign Manager page, hit the X to the right of the specific Ad Set you want to delete.

CONSIDER THIS …

Deleting a Campaign will remove it, and all of the Ad Sets within it, from your Dashboard. Deleting an Ad Set will remove it from the Campaign Manager page for the Campaign under which that Ad Set lived.

However, your reports will continue to show the spend and activity recorded from deleted Campaigns and Ad Sets for the time period when they were active.
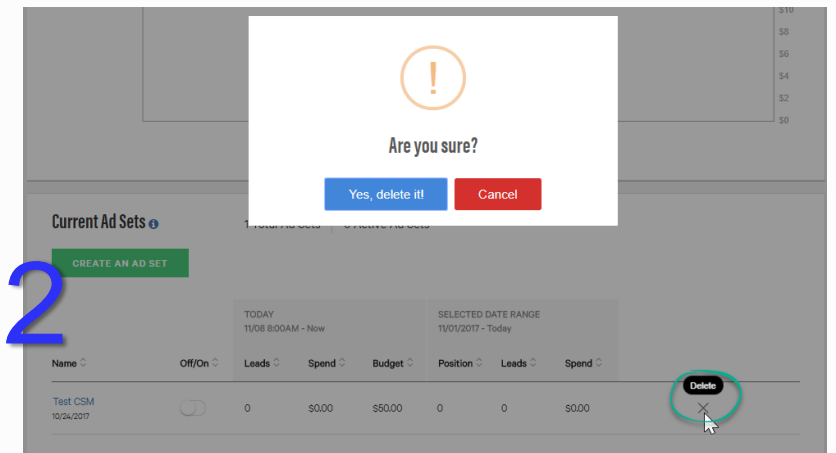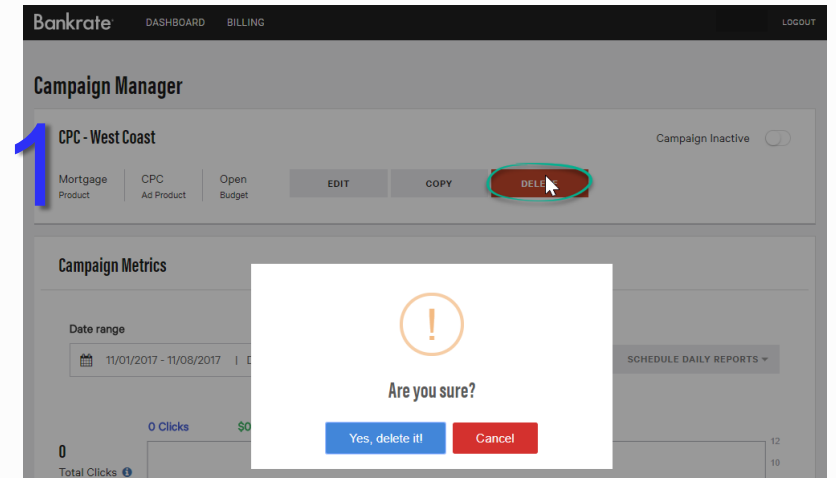
Funding Your Bankrate Account

All of your basic billing tasks in one easy-to-use section.

1. Funding Sources: Manage one or multiple credit cards on file.

2. Payment Plan: Choose from uninterrupted service on our continuous traffic plan, which will automatically charge your credit card each time your funds are depleted, or our pay-as-you-go plan, which notifies you whenever you need to replenish your funds.

3. Add Funds: Pay-as-you-go advertisers can pick a credit card on file and an amount to quickly replenish their account.

4. Funding History: A snapshot of the funding events, showing which credit card was charged, the amount charged, and the date with time stamp.

Tip: Bankrate will only store your card info for one year. Then you'll be prompted to reenter your info.