Promote User Guide
for the Personalization Portal

Digital Experience Delivered.
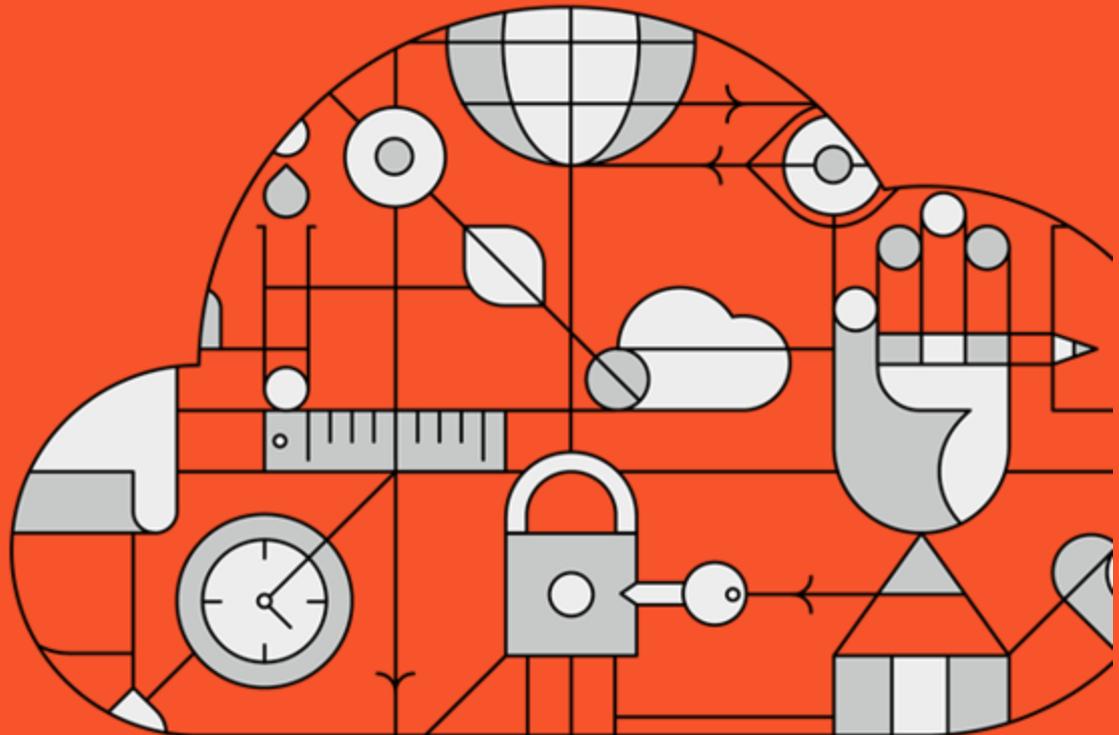
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Promote User Guide

v01

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Overview of Promote

This document shows how to create and configure Episerver Promote to display a promotional creative on a web page or pop-up. You can configure Promote campaigns to show personalized content on your website.

> **Note**: Promote is available for Episerver customers who use a non-Episerver platform. Episerver customers who use the Episerver platform have similar functionality already built into Episerver CMS. See the CMS Personalization guide.

In the Episerver Personalization Portal, the Promote Creatives main window shows your existing creatives.

» Click on a creative name to edit it, or click **Edit** ( ) to open the configuration page for that creative so you can edit it.
» Click **Delete** ( ) to delete that creative . A confirmation box appears.
» Click **Copy** ( ) to create a duplicate of an existing creative. Then click **Edit** ( ) for the new creative to make changes to it.
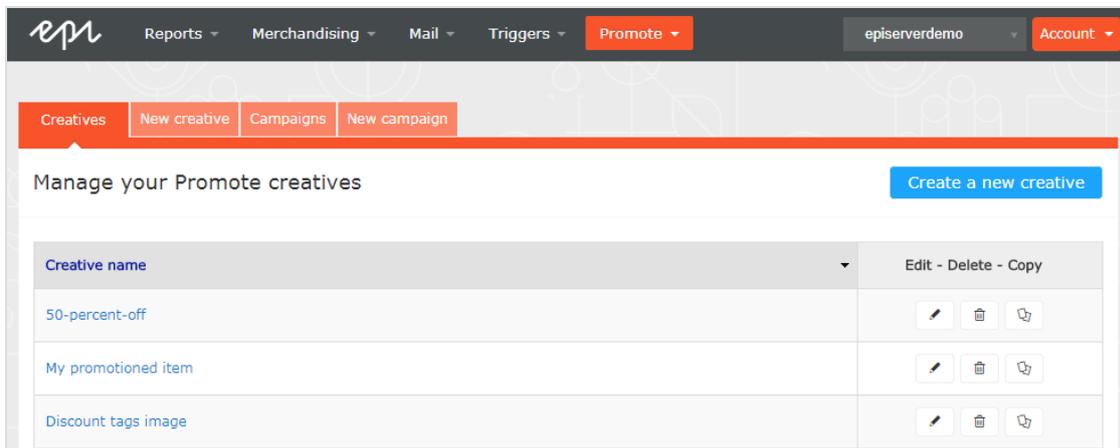
Create a Promote creative

A creative is artwork for a website advertisement, such as a banner, that is used to generate leads by promoting a discount, product, or service. Creative images are hosted on client servers.

Click the **New Creative** tab, or the **Create a new creative** button to start a new creative. You define a creative in the Style editor tab.

Style editor—Add image tab
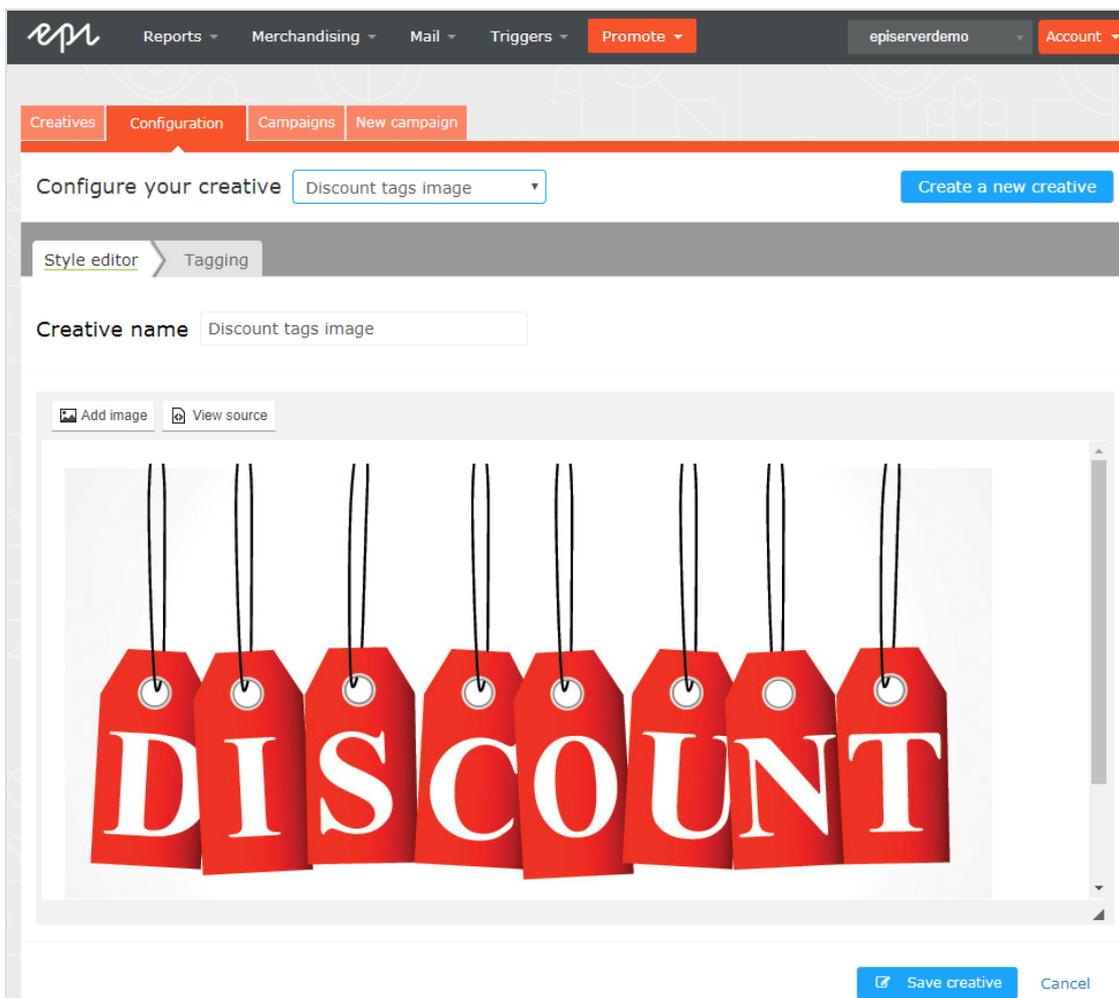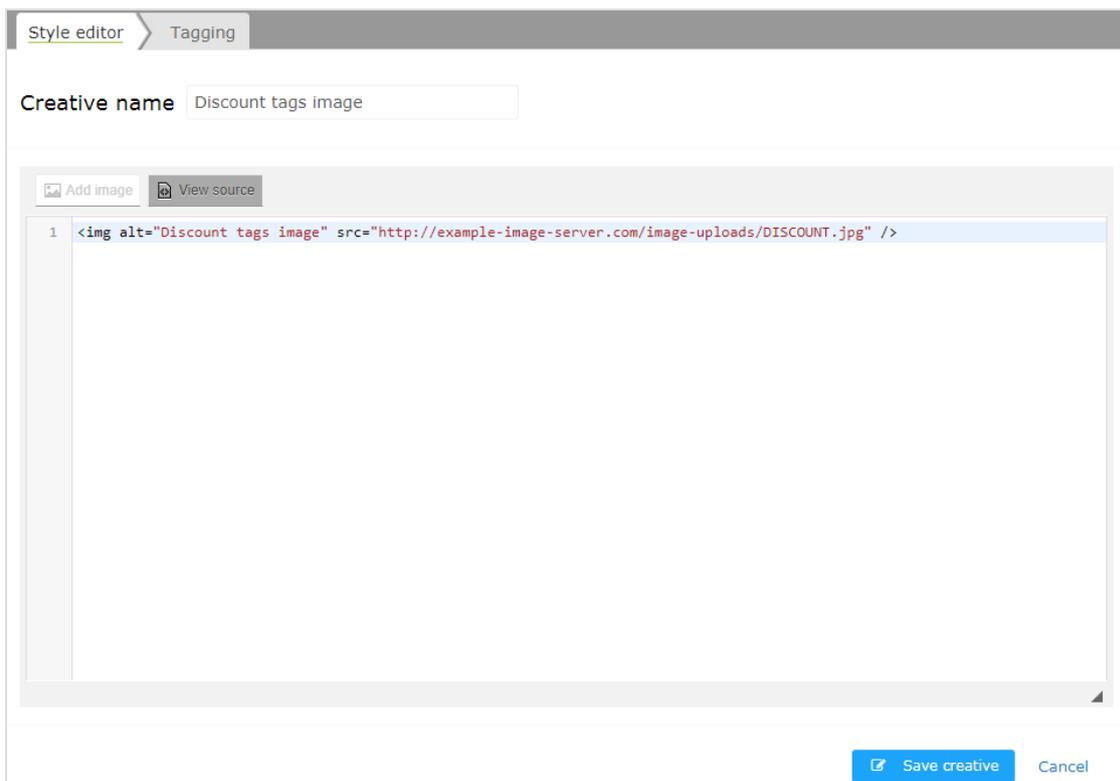

Clicking **Add image** lets you do the following:

» **Image Info**
  » **URL**. Enter of paste the URL of the creative image.
  » **Alternative Text**. Enter a description about the image.
» **Link**
  » **URL**. Enter the URL to go to when the user clicks the image. If you leave this blank, the creative is a non-clickable advertisement.
  » **Target**. Select how you want the URL to be displayed: New window (_blank), Topmost window (_top), Same window (_self), or Parent window (_parent).

Style editor—View source tab

Click **View source** to see the HTML code for the creative. For example:

```
<img alt="Discount tags image" src="http://example-image-server.com/image-upload-
s/DISCOUNT.jpg" />
```

You can add advanced HTML in the source code view of the creative, such as adding tracking to the link URL. For example:

```
<img alt="Discount tags image" src="http://example-image-server.com/image-upload-
s/DISCOUNT.jpg" >
  <script>
```

```
(function(i,s,o,g,r,a,m){i['GoogleAnalyticsObject']=r;i[r]=i[r]||function(){
(i[r].q=i[r].q||[]).push(arguments)},i[r].l=1*new Date();a=s.createElement(o),
m=s.getElementsByTagName(o)[0];a.async=1;a.src=g;m.parentNode.insertBefore(a,m)
})(window,document,'script','//www.google-analytics.com/analytics.js','ga');
ga('create', 'UA-11111118-1', 'example.com');
ga('send', 'pageview');
/*]]>*/
</script>
</img>
```

Tagging

> **Note**: Tagging works with identifier expressions only. For example, the expression *Category last viewed* looks for a match between the name of the category the user has last viewed and any tags in the *Related categories* tagging section. If there is a match, that expression is TRUE and the creative for that rule is likely to be displayed.

» **Related categories**. Select one or more categories to associate with the creative. For example, toys, shoes, cars, and so on. Typing starts filtering and displaying the existing categories that you can select. Click into a blank field to display the entire category list.

» **Related attributes**. Select one or more attributes to refine the creative association. For example, you can specify the color red, brand name, size, and so on. Typing starts filtering and displaying the existing attributes that you can select. Click into a blank field to display the entire attribute list.

Create a Promote campaign

A campaign describes the rules for displaying a creative. Click the **New campaign** tab or the **Create a new campaign** button to start a new campaign.

The Promote Campaigns main window shows the campaigns that are already created.

» Click on a campaign name to edit it, or click **Edit** (✎) to open the configuration page for that campaign so you can edit it.

» Click **Delete** (🗑) to delete that campaign. A confirmation box appears.

» Click **Activate it** (▶) to switch on a campaign or **Pause it** (‖) to switch off a campaign.

» Click **Copy** (🗗) to create a duplicate of an existing campaign. Then click **Edit** (✎) for the new campaign to make changes to it.

Configure your campaign—Rules tab

If you want to create a carousel campaign, create one campaign for each position in the carousel. So, a carousel with three positions needs three campaigns.

» **Campaign name**. Enter the name of the campaign.
» **Placement**. Select the position of the creative on the web page. Episerver creates these injection points, which define where the content is placed on the webpage.
» **Channel**. Select **Any**, **mobileweb**, or **web** for the channel on which you want the creative to display.

» **Pop-up campaign**. Set to yes to display the creative in a pop-up.

> **Note**: To use the Pop-up functionality, you must agree and define this with Episerver beforehand.

Each campaign comprises a set of rules. Each rule comprises a set of expressions. If the expressions are true, the creative associated with that rule is likely to be chosen. To ensure a creative always shows, each campaign should have a rule with a *Default creative* expression (that is, the fallback if all the other rules are false).

For each rule, you need to specify the following:

» **Creative**. Select the creative you want to associate with the rule.
» **Sticky**. Specify whether the same creative displays within a **Session**, (Date) **Range**, or (Number of) **Days**. If you select **No**, the creative can change each time the user returns to the web page.
» **Weight**. If you have more than one creative associated with this campaign, and more than one rule is true, the higher number weight among those creatives determines which creative is displayed.

For example: You may have three creatives, as follows:

» *15 percent*. If basket value is greater than USD 100, display the creative that promises 15 percent off a purchase of $100 or more. Weight: 2
» *10 percent*. If basket value is greater than USD 50, display the creative that promises 10 percent off a purchase of $50 or more. Weight 1
» *Buy more*. Display the creative that states, "The more you buy, the more you save." Weight 0.1
  » If the customer's basket value is $125, then the *15 percent* rule is true, and *10 percent* rule is also true. Because *15 percent* has a higher weight value, that creative is displayed.
  » If the customer's basket value is $45, then the *15 percent* rule is false, and *10 percent* rule is also false. The *Buy more* creative is displayed.

> **Note**: Two or more rules that have the same score produce uncertain results, so it is best to set the weight priorities. The default creative, which you set in the **Attribute** field, is usually the rule with the least weight rank, meaning that if all other rules are false, then the default creative is displayed. If you do not set a default creative, and other creative rules are all false, no creative displays.

Identifier expressions contain only one statement, which is either true or false, or is matched with any tags in the associated creative. If you choose **Identifiers > Default creative**, the creative displays when other creative rule conditions are not met. See also: Using expressions and groups in rules.

User expressions are made up of three parts:

» **Attribute**. Select an attribute based on users or identifiers.

> **Note**: When you choose an attribute, other value options may appear. For example, if you select the **City** attribute, a **Country** field appears with a flag image from which you select a country before selecting the **City** value.

» **Condition**. Operators include:
   - » equals to
   - » NOT equals to
   - » null or equals to
   - » null or NOT equals to
   - » less than
   - » less than or equals
   - » greater than
   - » greater than or equals
   - » starts with

» **Value**. Enter or select the attribute value that displays the creative if the rule is true and has the highest weight value.

For example, if you select (Attribute) *Gender*, (Condition) *equals to*, and (Value) *female*, the creative displays when the visitor is identified as female.

Click **Toggle advanced** to display the underlying rule. For example:

```
(region="Colorado - US") and (u.gender="female")
```

> **Note**: If you edit the advanced rule and it is not formed properly, the user interface will not show it and an error message is displayed. See also: Using expressions and groups in rules.

Click **Add new row** to create another rule for the same or other creative.

Configure your campaign—Activation tab

Specify when you want to activate the campaign.

You can limit the campaign to specified IP addresses. This is useful for testing your campaign by limiting it to your own IP address. Click **Add my IP** to use your own local IP address; only you can see the results.

» **Start**. Specify the date and time you want the campaign to begin.
» **End**. Specify the date and time you want the campaign to finish. If you leave this blank, the campaign continues until you manually stop it.
» **Time zone**. Specify the time zone in which the campaign runs.
» **Advanced options**. You can choose the days of the weeks that you want the campaign to be active.
» **Activation setting**. Specify IP addresses for which this campaign applies. Click **Add my IP** to use your own local IP address for testing purposes.

Identifier attributes

When using an identifier, any tags that a creative has will determine whether a creative is displayed. The following table describes the identifier attributes.

Identifier Attribute	Description
Default creative	Display the creative no matter what other conditions exist for the creative.

Identifier Attribute	Description
Arrived direct to site	Display the creative if the visitor came to the site directly.
Arrived from organic search	Shows a creative based on the visitor coming from an organic search-engine listing (as opposed to from an advertisement).
Arrived from PPC search	Shows a creative based on the visitor coming from a search campaign (Pay-Per-Click) advertisement.
Attributes from last viewed product	Display the creative if any of the attributes of the visitor's last viewed product match any of the creative's **Related attributes** tags.
Attributes from purchase history	Display the creative if any of the attributes of the customer's purchased products match any of the creative's **Related attributes** tags.
Categories from purchase history	Display the creative if any of the categories from the customer's purchase history match any of the creative's **Related categories** tags.
Category currently viewed	Display the creative if the category of the page currently viewed matches any of the creative's **Related categories** tags.
Category last viewed	Display the creative if the category of the last viewed page matches any of the creative's **Related categories** tags.

User Attributes

The following table describes the user attributes.

User Attribute	Description	Example
Average days between orders	The average number of days between the customer's orders. Specify a numerical value.	*average days between orders less than 10*
Average days between visits	The average number of days between the visitor's visits. Specify a numerical value.	*average days between visit greater than 1*
Basket value	The total value of the visitor's basket.	*basket value*

User Attribute	Description	Example
	When selected, a currency field also appears to select the type of currency used.	*less than USD 100*
City	The city estimated from the visitor's IP address. When selected, a country field also appears to select the country and then select or enter the city name. Use only city names from the drop-down list.	*city equals US Boston*
Country code	The country estimated from the visitor's IP address. Specify an ISO 3166-1 two-letter country code.	*country code equal to AU (Australia)*
Customer	Someone who has previously made a purchase. Choose whether they should be a new or a returning customer.	*customer not equal to new*
Gender	The visitor's gender, based on historical purchase information. Choose from the available list of options.	*gender null or equal to female (not males)*
Number of basket page visits	The number of times a customer has visited a basket, such as a customer trying to decide whether to purchase. Specify a numerical value.	*number of baskets page visits greater than 2*
Number of days since last order	The average number of days between a customer's orders. Specify a numerical value.	*number of days since last order greater than 4*
Number of days since last visit	The number of days since the customer's last visit to the site. Specify a numerical value.	*number of days since last visit greater than or equals 10*
Number of historical visits	The total number of visits the visitor has made to the site in the past (not including the current visit). Specify a numerical value.	*number of historical visits greater than 50*

User Attribute	Description	Example
Number of product page visits	The number of times a product page is visited by the customer. Specify a numerical value.	*number of product page visits less than or equals 20*
Number of visits since last order	The number of visits since the customer placed an order. Specify a numerical value.	*number of visits since last order greater than 5*
Region	The region estimated from the visitor's IP address. When selected, a country field appears to select the country and then select or enter the region name. Use only region names from the drop-down list.	*region equal to Iowa* (US)
Segment	The name of the Episerver-generated segment or imported client customer segment. Choose one from the list of available segments.	*segment not equal to Lapsed - Other*
Site-search keyword (recent from URL)	Specify the most recent keyword the customer searched for in this session on your website. The keyword is then remembered throughout the session. Wildcards are not supported. The keyword must appear in the URL.	*site-search keyword is equal to dolls*
Source	The name of the referral source. Choose one from the list of available options (e.g. the user arrived at the site directly from entering the site's URL, via a search engine, via an affiliated partner site, or from an unknown source).	*source equal to affliate*
Total orders	The customer's total number of orders. Specify a numerical value.	*total orders greater than 10*
Visitor	Choose the type of visitor from the available list. A new visitor has no previous tracked sessions, while a returning visitor has at least one.	*visitor is equal to new*

User Attribute	Description	Example
Zip code	The postal code estimated from the visitor's IP address. When selected, a country field also appears to select the country and then select or enter the ZIP or postal code.	*zip code starts with 012* (US)

Using expressions and groups in rules

An *expression* describes a conditional instance, such as *basketvalue less than USD 100*.

A *group* combines two expressions such as *city equals to New York AND basketvalue less than USD 100*; where both expressions must be true for the group to be true. If the group is expressed with an OR operator, such as *city equals to New York OR basketvalue less than USD 100*, only one of the expressions needs to be true for the group to be true.

You can specify one or two expressions in a group and have one or two groups of expressions. The following example shows the logical results between two groups of two similar expressions but with differing Boolean operators.

```
(city="New York - US" AND basketvalue["USD"]<"100")  OR (u.numhistoricalvisits>"3"
AND u.gender="female")
```

```
(city="New York - US"  OR basketvalue["USD"]<"100") AND (u.numhistoricalvisits>"3"
OR u.gender="female")
```

To simplify the example, each part of the expression is assigned a letter (A, B, C, D) and evaluated true (T) or false (F) with AND and OR operators inside and outside the groups to determine whether the whole rule is true or false, which determines whether the creative is displayed (with weight factors, also). The following table shows how these expressions evaluate.

(A and B) or (C and D)	(A or B) and (C or D)

(T and T) or (T and T)
    T   or   T   = True
	(T or T) and (T or T)
	    T and T = True

(T and T) or (T and F)
    T   or   F   = True
	(T or T) and (T or F)
	    T and T = True

(T and T) or (F and T)
    T   or   F   = True
	(T or T) and (F or T)
	    T and T = True

(T and T) or (F and F)
    T   or   F   = True
	(T or T) and (F or F)
	    T and F = False

(T and F) or (T and T)	(T or F) and (T or T)

(A and B) or (C and D)	(A or B) and (C or D)
F or T = True	T and T = True

(T and F) or (T and F)
   F   or   F   = False
	(T or F) and (T or F)
	   T and T = True

(T and F) or (F and T)
   F   or   F   = False
	(T or F) and (F or T)
	   T and T = True

(T and F) or (F and F)
   F   or   F   = False
	(T or F) and (F or F)
	   T and F = False

(F and T) or (T and T)
   F   or   T   = True
	(F or T) and (T or T)
	   T and T = True

(F and T) or (T and F)
   F   or   F   = False
	(F or T) and (T or F)
	   T and T = True

(F and T) or (F and T)
   F   or   F   = False
	(F or T) and (F or T)
	   T and T = True

(F and T) or (F and F)
   F   or   F   = False
	(F or T) and (F or F)
	   T and F = True

(F and F) or (T and T)
   F   or   T   = True
	(F or F) and (T or T)
	   F and T = True

(F and F) or (T and F)
   F   or   F   = False
	(F or F) and (T or F)
	   F and T = False

(F and F) or (F and T)
   F   or   F   = False
	(F or F) and (F or T)
	   F and T = False

(F and F) or (F and F)
   F   or   F   = False
	(F or F) and (F or F)
	   F and F = False