Digital Experience Cloud

Episerver Promote

User Guide

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Episerver Promoted Content

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

This topic explains how to use Episerver Promoted Content to show personalized content on your website to generate leads by promoting a discount, product, or service.

Promoted Content displays a promotional *creative* on a web page or pop-up. A creative is artwork for a website advertisement, such as a banner. When clicked, a creative can direct customers to a page where they can take advantage of the discount.

Creatives are made available to customers through a Promoted Content *campaign*, which is a set of rules for displaying a creative. For example: If a site visitor's shopping cart has more than $100 worth of goods, present an offer for free shipping on orders over $100. The image that conveys the offer is a creative.

Create a creative

This section explains how to create a new creative or edit an existing one. Editing options include modifying a creative's image, properties, and HTML source. You can also copy or delete a creative.

In the Episerver Personalization Portal, open the **Promoted Content** > **Creatives** screen and click the **New Creative** tab or the **Create a new creative** button to start a new creative. Use the **Style editor** tab to define the creative.
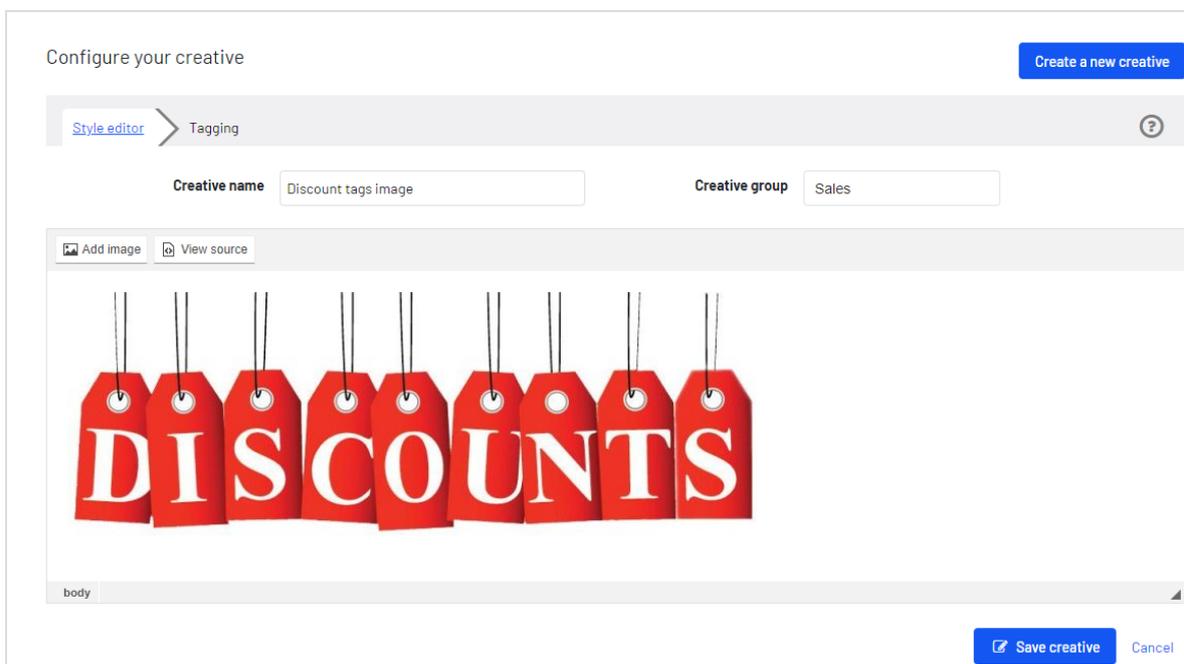
Enter the creative's image information

Prerequisite: The image is uploaded to a web location, that is, it has a URL.

1. Use the **Creative name** field to assign a name to the creative. This name identifies the creative on all Promoted Content screens.
2. Use the **Add image** button to enter the following information about the first image.

- **Image Info** tab

    ○ **URL**.Enter or paste the URL of the creative image.
    ○ **Alternative Text**.Enter the image's alternate text. See also: HTML <img> alt attribute.

- **Link** tab

    ○ **URL**.Enter the URL to which the user is redirected when clicking the creative. If you leave this field blank, the creative is a non-clickable advertisement.
    ○ **Target**.If you enter a link URL above, select its target attribute. Possible values:

        ■ New window (_blank)
        ■ Topmost window (_top)
        ■ Same window (_self)
        ■ Parent window (_parent).

    Note: A creative can have multiple images.

Enter the creative's tagging

Use a creative's **Tagging** screen to help display a personalized creative, one that is unique to the site visitor. To achieve this, Promoted Content uses tags assigned to a creative to try to satisfy Promoted Content campaign rules while a customer is shopping on your website. For example, if a campaign rule uses the attribute *Category last viewed*, Promoted Content tries to match the visitor's last-viewed category to a creative's **Related categories** tags. To continue the example using the screen below, if a visitor's last-viewed category is **Men's jackets**, the image assigned to that creative 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.

  As you begin typing, related categories whose initial characters match your entry appear. To display the entire category list, click the **Related categories** field before entering any characters.

- **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.

  As you begin typing, related attributes whose initial characters match your entry appear. To display the entire attribute list, click the **Related attributes** field before entering any characters.

Edit a creative

You can perform the following actions on an existing creative.

- Cut image
- Copy image
- Paste a new image
- Edit its link
- Remove its link
- Update or remove its properties, that is, its alt text, destination link, or target

1. From the Creatives screen, click **Edit** next to the creative that you want to edit
2. Right click the image that you want to edit. A menu appears.
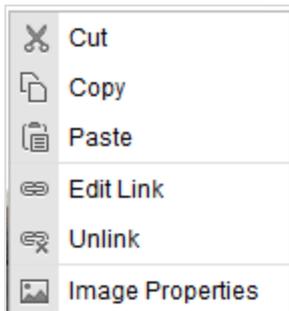
3. Perform the desired action.

Modify a creative's HTML source

Use the **View Source** button to modify a creative's HTML source.

1. From the Creatives screen, click **Edit** next to the creative that you want to edit.
2. Click **View Source**. The creative's HTML source code appears. Edit as needed.
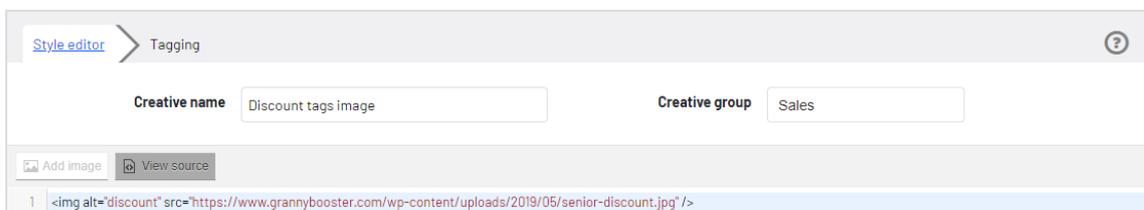
In source view, you can add advanced HTML, such as tracking. For example:

```
<img alt="Discount tags image"
    src="https://example-image-server.com/image-uploads/senior-dis-
count.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>
```

Delete a creative

1. In the Episerver Personalization Portal, open the **Promoted Content** > **reatives** screen.
2. Locate the creative that you want to delete.
3. Click **Delete** 🗑 to delete it. A confirmation box appears.

Copy a creative

If you copy a creative, a version of it is saved, but **copy** is added to its name.

To copy a creative:

1. In the Episerver Personalization Portal, open the **Promoted Content** > **Creatives** screen.
2. Locate the creative that you want to copy.
3. Click **Copy** 🗐 to create a duplicate of the creative. It appears on the **Promoted Con-**

tent > **Creatives** screen.

4. If desired, click **Edit** ✎ to modify the new creative.

⦿ Create a Promoted Content campaign

A Promoted Content campaign describes the rules for displaying creatives. For example:

- If a customer's shopping cart exceeds $100, display the 20% off creative.
- If a cart's value is less than $100, display the 10% off creative.

The Promoted Content **Campaigns** tab shows existing campaigns.

- To start a campaign, go to the Campaigns screen and click the **New campaign** tab or the **Create a new campaign** button.
- To edit a campaign, click its name or **Edit** ✎.
- To delete a campaign, click **Delete** 🗑. A confirmation box appears.
- To switch on a campaign, click **Activate** ▶. To temporarily switch off a campaign, click **Pause** ❚❚.
- To create a duplicate of a campaign, click **Copy** ⎘. Then, click **Edit** ✎ to modify the new campaign.

Manage your campaign

Campaign name ▾	IP trap ⇕	Edit - Status - Delete - Copy
Justin Campaign		✎ ▶ 🗑 ⎘

Configure a campaign – Rules tab

Campaigns are defined on two tabs:

- **Rules**. Define creatives with the criteria that must be satisfied to display them.
- **Activation**. Define when the campaign is active.

> **Tip:** 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.

To create a campaign, complete these fields.

- **Campaign name**. Enter a name for the campaign.
- **Placement**. Select the position of the rule's creatives on a web page. Episerver creates the drop-down values, which define the creative's page location.
- **Channel**. Determine if the campaign's creatives will appear on mobile devices (**mobileweb**), computers (**web**), or both (**Any**).

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

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

Set up a campaign's rules

Each campaign has a set of rules. Each rule is made up of the following fields. If a rule evaluates to true, its creative is eligible for display.

- **Creative**. Select the creative to associate with the rule. See also Create a creative.
- **Weight**. If a campaign has more than one creative that is true, the creative with the higher weight is displayed.
  Example

  A campaign has three rules:

  ○ *15 percent*. If the 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 the 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 a customer's basket value is $125, the *15 percent* rule is true, and the *10 percent* rule is also true. Because *15 percent* has a higher weight, its creative is displayed.

  If the customer's basket value is $45, the *15 percent* and *0 percent* rules are false. So, the *Buy more* creative is displayed.

  > Note: Because two or more rules with the same score can produce uncertain results, you should use **weight** to set priorities.
  >
  > Also, the default creative is usually the rule with the least weight rank, so if all other rules are false, the default creative is displayed. If you do not set a default creative, and all rules are false, no creative displays.

- A set of **criteria**, also known as an *expression*. If an expression is true, the associated creative is likely to be shown. See also: Set up expressions.

You can create up to two rules for each creative. Click **Add new row** to create another rule for the same creative.

Set up the default creative

To ensure that one creative always shows, include a *Default creative* expression, which defines a fallback creative if all other rules evaluate to false.

To set up a default creative expression for an existing creative:

1. In the **Creative** column, select the default creative.
2. Assign its **Weight** values, as described in Configure a campaign – Rules tab.
3. In the **Criteria** column's first field, select **Identifiers > Default creative**.

Set up expressions

An *expression* describes a conditional instance, such as *basketvalue less than USD 100*. A creative appears if its expression is true and it has the highest weight value. Expressions are made up of three parts:

- **Attribute**. Select an attribute based on identifiers or users.
  Identifier attributes

  When using an identifier, a creative's tags may determine if a creative is shown.

Identifier attribute	Shows the creative ...
Default creative	No matter what other conditions exist for the creative.
Arrived direct to site	If visitor came to the site directly.
Arrived from organic search	If visitor came from an organic search-engine listing (as opposed to from an advertisement).
Arrived from PPC search	If visitor came from a search campaign (pay-per-click) advertisement.
Attributes from last viewed product	If any attributes of the visitor's last viewed product match any of the creative's **Related attributes** tags.
Attributes from purchase history	If any attributes of the customer's purchased products match any of the creative's **Related attributes** tags.

Identifier attribute	Shows the creative ...
Categories from purchase history	If any categories from the customer's purchase history match any of the creative's **Related categories** tags.
Category currently viewed	If the currently-viewed page's category matches any of the creative's **Related categories** tags.
Category last viewed	If the last-viewed page's category matches any of the creative's **Related categories** tags.

User Attributes

User Attribute	Description	Example
Average days between orders	The average number of days between a customer's orders. Specify a numerical value.	average days between orders less than 10
Average days between visits	The average number of days between a visitor's visits. Specify a numerical value.	average days between visit greater than 1
Basket value	The total value of the visitor's basket. When selected, a currency field appears to let you select a currency.	basket value less than 100 $
City	The city estimated from the visitor's IP address. When selected, a country field also appears to let you select a country 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 is shopping on	customer not

User Attribute	Description	Example
	your website. Choose whether this should be a new or a returning customer.	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 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 a 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 a visitor has made to the site (excluding current visit). Specify a numerical value.	number of historical visits greater than 50
Number of product page visits	The number of times the customer visited a product page. 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 selec-	region equal to Iowa (US)

User Attribute	Description	Example
	ted, a country field appears to let you select a country and then a region. Use only regions from the drop-down list.	
Segment	The name of the Episerver generated segment or imported client customer segment. Choose from the list of available segments.	segment not equal to Lapsed - Other
Site-search keyword (recent from URL)	The most recent keyword a customer searched for in this session on your website. The keyword is remembered throughout a 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 (for example, user entered site's URL, via a search engine, via an affiliated partner site, or from an unknown source).	source equal to affiliate
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 list. A *new* visitor has no previous tracked sessions, while a *returning* visitor has at least one.	visitor is equal to new
Zip code	The postal code estimated from the visitor's IP address. When selected, a country field	zip code starts with 012 (US)

User Attribute	Description	Example
	appears to let you select a country then select or enter the ZIP or postal code.	

- **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. For example, if you select (Attribute) *Gender*, (Condition) *equals to*, and (Value) *female*, the expression evaluates to true if the visitor is identified as female.

Click **Toggle advanced** to display and possibly edit the rule rendered as source code. For example, `(u.gender="female")`.

> Note: If you edit a rule's source but the code is not properly formed, the user interface does not show it, and an error message is displayed. See also: Using expressions and groups in rules.

Entering a second expression group

To add more conditions to a rule, click **Add group**. Here is an example of a group with two conditions:

- `(city="New York - US" AND basketvalue["USD"]<"100")`

  OR

- `u.numhistoricalvisits>"3" AND u.gender="female")`

If either rule evaluates to true, the associated creative may be displayed (depending on its weight).

Using expressions and groups in rules

A *group* combines two expressions. For example, `city equals to New York AND basketvalue less than USD 100`. In this case, because of the `AND` operator, both expressions must be true for the group to be true. If the group uses an `OR` operator, such as `city equals to New York OR basketvalue less than USD 100`, only one expressions needs to be true for the group to be true.

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

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

```
(C)(city="New York - US" OR basketvalue["USD"]<"100") AND (D)(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. Only true expressions help determine if a creative is displayed; weight factors are also considered.

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

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

Configure a campaign– Activation tab

Use the **Activation** tab to specify when you want to the campaign to be active. You can also limit the campaign to certain IP addresses.

- **Start**. Specify the date and time when the campaign will begin.
- **End**. Specify the date and time you want the campaign to finish. If you leave this blank, the campaign continues unless you manually stop it via the **Pause** button.

- **Time zone**. For informational purposes, the campaign's time zone appears.
- **Advanced options**. If desired, choose the days of the weeks when the campaign will be active.
- **Activation setting**. If you want to restrict this campaign to one or a few computers, specify their IP addresses. For example, enter the IP address of everyone on your team so they can test a campaign before it goes public. Click **Add my IP** to use your own local IP address.

  To make this campaign available to the general public, leave this field blank.

Episerver Customer-Centric Digital Experience Platform (DXP)™

The Episerver Customer-Centric Digital Experience Platform (DXP)™ unifies digital content, commerce and marketing in one platform, including omnichannel solutions for intelligent campaigns. The platform uses artificial intelligence and behavioral analytics to deliver personalized experiences everywhere. With our secure, reliable platform you can quickly increase engagement, revenue and productivity, while getting the fastest time to value.

About Episerver

At Episerver, we believe digital transformation is a journey. We have been guiding customers for more than 20 years in providing standout digital experiences. Today our network of 880 partners, in 30 countries, supports 8,000 customers and over 30,000 websites. Founded in 1994, Episerver has offices in the US, UK, Sweden, Australia, Germany, Denmark, Finland, Norway, Poland, the Netherlands, Spain, South Africa, Singapore, Vietnam and the UAE.

For more information, visit **episerver.com**.