DeepTarget Training Guide

##### October 9, 2019

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# Toolbar and Quick Help

Toolbar

To access features in the DeepTarget application, refer to the following sections:

* Home – this section contains the Dashboard and easy access to the most recently modified campaigns.
* Campaigns – this section is used to create campaigns and banner content.
* Reports – this section is used to generate and schedule reports.
* Settings – this section is used to set parameters for prioritization of campaigns, ad rotation, opting out end-users, setting up speedbump content, changing passwords, managing users, and most importantly mapping product codes into categories.
* Support – this section is used to contact Support, find the FAQ, and find useful resources about reports, ad sizes, release notes.

Quick Help

Look for “?’ interspersed throughout the application for Quick Help. Quick Help offers instructions on how to use a particular capability.

# Home (Dashboard)

There are six cards on the DeepTarget dashboard:

* + Recently Modified Campaigns – shows the three most recently modified campaigns in date order. Can edit, preview, publish and unpublish campaigns from here. Contains snippets of information about the audience type, category and when it was last published.
  + Performance Metrics – provides an overall view of the status of data extracts and campaigns
  + Data Freshness – shows the days since the last data upload
    - Green - within a 30-day window
    - Red – More than 30 days
  + Campaign Freshness – shows the average age of the campaigns
    - Green – within a 90-day window
    - Red – more than 90 days
  + Key Engagement Indicator (KEI) – this is a DeepTarget-derived Key Performance Indicator (KPI) that reflects the average number of users logged in to produce one click. The lower the number, the better. It shows you the score for the prior month.
    - Range (1-50 Outstanding, 51-100 Excellent, 101-150 Good, 151-200 Fair, 201+ Attention Suggested.)
  + Campaigns Needing Attention - any campaign >90 days old or is trending down will show up here
  + Published Campaigns by Category – this donut chart shows the number of campaigns in each category. As you hover over the pieces, it will display the number of published campaigns in that category.
  + Most Viewed Campaigns in the Last 7 Days – this bar chart shows the most viewed campaigns in the last 7 days. The max number of campaigns shown is 8. This chart is useful when determining if a campaign needs to be prioritized.
  + Ad Stats Today – this real-time gauge shows the total number of impressions today as well as the highest number of impressions seen in the last 30 days.
  + Accumulation of all impressions seen across all channels
  + Ticks every 5 seconds
  + The number with the largest text = number of views seen so far today
  + The number with the smallest text = highest number of views reached in the last 30 days.
  + Clicks – shows # of clicks today

# Campaigns

## Campaign Audience Types

There are six Campaign Audience Types:

* + Targeted by Rule - a targeted campaign that shows to those individuals who meet the criteria of the rule. Financial Institutions (FI) can create a Targeted by Rule campaign by either Build Rule or contacting DeepTarget to have the rule coded in the system in order to function. A rule can be created for any of the fields that are in the data extracts.
  + Targeted by List - a targeted campaign that shows to those individuals who are included in a list. The list must be a .csv file containing a single column of data. The data can have a header row, but it is not required. The data should be a list of unique identifiers for individuals (either NetTeller Ids or MemberID). Each campaign has its own list. Financial institutions will create their own segmented list.
  + All Users – a targeted campaign that shows to all current individuals. There should always be at least one All Users (or non-targeted) campaign running in all channels at all times.
  + Non-Targeted – a non-targeted campaign that shows to those individuals who don’t qualify for any other targeted campaign or who have joined since the last data upload. There should be at least one non-targeted (or All Users) campaign running in all channels at all times.
  + Opt-Out – a targeted campaign to use when an end-user requests that they do not want to see ads. This is an infrequent occurrence. If this occurs, you will need to create an opt-out banner and then opt-out that user. An Opt-out banner can be blank (use background color) or say something like ‘Thanks for being a customer’, etc. To opt-out the user, go to ‘Settings->Opt Out Users’. A pop-up box comes up and you would type in the id (internally UserIdLogin/UserIdRelationship) of the person wishing to opt-out.
  + Global Override – a campaign that shows to all individuals except for those on the Opt-out list. Overrides all other campaigns (i.e. when this is turned on, all other published campaigns are suspended from showing until it is turned off). This audience type must be explicitly turned on or off after publishing to make it active or inactive. FI’s typically use this to get out a notice (branch closed, holiday notice, weather event).

## Campaign List

Select Campaigns on the toolbar and a list of all campaigns will be displayed.

* Filtering
  + Audience types – targeted by rule, non-targeted, etc.
  + Published status – if published, unpublished changes, not published
  + Category – category type
  + Sort – last published new/old, campaign name, campaign category, audience
* Campaign Summary
  + Plus (+) - expands the campaign description information. Shows campaign name, last published date, audience type, campaign category, start/end dates, number of banners in OLB/Mobile channel, notification/click-to email flags.
  + Minus (-) - contracts the campaign description information. Shows campaign name, last published date, audience, and campaign category
* Stoplight Indicators
  + Green – published. The campaign is being seen by the end user.
  + Yellow – previously published, but modifications have been made to it that have not been published. The previous version is being seen by the end user.
  + Red – not-published. The campaign is not being seen by the end user.
* Highlighting
  + If a campaign is highlighted in blue in the campaigns list, it is a prioritized campaign.
* Eyeball – shows the actual size of banner when in the banner editor. When in the campaign view, it shows an overview of what the banner looks like.
* Add Campaign button
  + When selected brings up a form and you would key in the new campaign name, category (auto, CD, etc.) and target audience (type of campaign) and click ‘Create’.
  + It then takes you to the Ad Settings page, so you can begin to create/upload your banner.
* Campaign Fly-Out Menu (three horizontal lines):

These options vary based on the campaign audience type:

* + Campaign Settings – use this option to set campaign start/end dates, enter ADA text, set product assignments and other options.
  + Ad Settings – use this option to go to the banner editor to create/upload graphics for the campaign.
  + Email Settings – use this option to set up email notifications when a banner is clicked. This option is not mandatory, but used for lead generation and follow-up.
  + Build Rule – this option only shows for Targeted by Rule campaigns and allows the financial institution to build their own campaign rule.
  + Upload List – this option only shows for Targeted by List campaigns and allows the financial institution to upload a list of individuals to target.
  + Campaign Performance – this option displays a historical look at the unique impressions/clicks for a campaign. The data and chart can be exported to an Excel spreadsheet or a png file, respectively.
  + Copy Campaign – this option is used to copy a campaign to a new campaign.
  + Delete Campaign – this option is used to permanently delete a campaign.

## Campaign Settings

Campaign Settings has multiple tabs depending on the type of campaign.

* Campaign Settings Tab
  + Campaign Name – this is the name of the campaign.
  + Campaign Category – this is the category type of the campaign (e.g. Auto, Consumer Loan, Mortgage, etc.).
  + Campaign Dates – this is the date range for the campaign. By default, it starts showing as soon as published and never stops showing. Can be set up to publish annually.
  + Campaign Rule – applies to Targeted-by-Rule campaigns. Shows the campaign rule in free-form text. This is for informational purposes only. The potential individual ‘Reach’ for that rule is also displayed.
  + Campaign List – applies to Targeted-by-List campaigns. Shows the name of the .csv file used for the campaign. The potential individual ‘Reach’ for that list is also displayed.
  + Campaign Description/ADA Description - Shows the campaign description in free-form text. Text in this field can be read by a screen reader for a disabled person.
  + De-Targeting - De-Targeting automatically deactivates a Target-by-Rule campaign for users who are showing no interest in the campaign. A campaign is deactivated based on the values specified for three parameters (Target On-Days, Minimum Impressions Required, Target Off-Days).The campaign will be de-targeted for any user who has seen the minimum number of impressions within the number of days specified by the 'Target On-Days' parameter but has shown no interest (no click) in the campaign. The number of days this campaign will be de-targeted is determined by the number of days specified by the 'Target Off-Days' parameter. If a user has not logged enough impressions within the 'Target On-Day' time period, the campaign will continue to be targeted for the user. The campaign will also continue to be targeted for the user if at least one click is made on the campaign within the Target On-Day duration and the Minimum Impressions are reached within that timeframe. The Target On-Day time period begins as soon as the campaign is published/activated.
  + Collect Metrics – turn this off if you don’t want to collect metrics on a campaign. Do not use this if the campaign is to be used to open an account.
* Product Assignments Tab
  + Associates a campaign with an account type for reports (Influenced Conversion and Monthly Management Report.)
  + Must be set for each campaign that will open a new account.
  + Can assign individual product codes or groups of product codes.
  + When a campaign is created, it is automatically defaulted to the product code group that is associated with the campaign category.
* Build Rule Tab
  + Applies only to Targeted by Rule campaigns. Rules can be built here or via the campaign fly-out menu.
* Request Rule Tab
  + Applies only to Targeted by Rule campaigns. Use this option to request that DeepTarget Support create the rule. Complex rules and rules with ‘OR’ conditions must use this option.

## Ad Settings

Ad Settings are used to create/upload graphics for a campaign. A campaign may be used to reach individuals in multiple channels. Graphics for each channel type (e.g. online banking, mobile, print, e-portal, email, web, etc.) must be uploaded on the appropriate tab for that channel.

* Banner Thumbnail – shows a thumbnail view of the banner
* Eyeball – preview the banner. This shows the banner in the size it will appear in the channel.
* Pencil – edit the banner
* Trash can – deletes the banner
* Add New Banner

Select add new (+). Select the dimensions appropriate for the channel. If there is already a banner with the same dimensions of a banner you want to create, you will not be able to create a new banner ad with the same dimensions without first deleting the old banner.

* + Upload – choose this option to upload your own static (jpg, gif, png) or animated gif banner.
  + HTML – choose this option to upload your own HTML banner. This option must be used if the banner is an interstitial banner.
  + Library – choose this option to use a banner from the DeepTarget banner library.
  + Blank – choose this option to create your banner from scratch.
* Banner Editor

The Banner Editor has options to upload images, upload banners, select images from the image library, select banners from the banner library, add text to banners, and modify click settings.

* Banner Settings – this section allows you to upload your own banner or select a banner from the banner library. Options to set the banner color and background fill are included. The banner canvas is shown.
* Image Settings – this section allows you to upload your own images or select an image from the image library. Options for image manipulation are also in this section. The image library contains images of people, backgrounds, buttons.
* Text Settings – this section allows you to add multiple text boxes to the banner. Options for text manipulation are also in this section.
  + Prepend First Name – select to prepend the individual’s first name in order to personalize the banner. When checked, a comma is put after the pre-pended name. A field is included to test how the name would appear – this is for design purposes.
  + Capitalize First character- select to capitalize the first letter of the next word after the name.
* Click Settings – this section allows you to define the behavior of what happens when a user clicks on an ad.
  + Go to URL – this is the URL for redirection when a banner is selected by a user. A test button is included to test the link.
  + No action on click – select this button if you don’t want any action to be taken when a user clicks on a banner.
  + Open in new window – select this box to open the redirected URL in a new window. It is on by default.
  + Speedbump – select this option if the banner redirects the user to a site outside the financial institution’s app. This will display the speedbump form that was defined in Settings->Speedbump Content before moving to the URL specified in the Click Settings. This is used only for online banking and for specific online banking platforms (Share One and WRG).
* Save - when edits are complete, select the ‘Save’ button to save your changes and exit the banner editor. The Save option is not enabled until you choose a Click Settings option.
* Interstitial Settings – this option is only available when the banner is an HTML banner.
  + Display as an interstitial – select to denote that the HTML banner is an interstitial banner.
  + Remind after X sessions – sets the number of sessions that the interstitial ad will be shown to the user before it is suspended. An ad session is a period during which ad requests are made by a unique user by visiting one or more pages with ads. If 20 minutes pass without any kind of ad request from the user, the ad session ends. However, every time a user application page requests an ad, the session resets the expiration time by adding 20 minutes from the time of the new ad request.

## Email Settings

There are two tabs for Email Settings:

* Notification Email – this option notifies a person at your financial institution when an end-user has clicked on a banner.
  + Email Type - select the type of email the person at the financial institution will receive (Text Only or HTML).
  + Send Email To - type in the email address of the person(s) at the financial institution. Multiple people are separated by commas with no spaces included.
  + Email Subject Line - Type in a subject line for the email.
  + Email Body – This is the section where the content of the email that is to be sent to the ‘Send to Email’ recipient is created. By default, there are a limited number of fields from the database accessible to include in the body of the email. If you would like additional fields exposed, contact DeepTarget Support.
  + Mark Secure Data Area - If any information in the body of the email needs to be secure, highlight the text and select ‘Mark Secure Data Area’. The email that the recipient gets will have the message in an encrypted attachment. The recipient will require special software from DeepTarget to decrypt the message.
  + Save - select ‘Save’ to save settings.
  + On/Off - explicitly select ‘On’ to turn it on for the campaign.
* Click-To-Email – this option sends email at a specified time to the end-user who clicked a banner.
  + Select Email to Send – select the email to send to the user. First create an email that would be sent to the end user from the financial institution.
  + Open DeepTarget Email – this is a subset of our Email application and gives the financial institution a tool to create the email content.
  + Email Subject Line - type in subject line for the email.
  + Email Sender’s Name – this is the name of the individual (or department) at the financial institution who is sending the email.
  + Sender’s Email Address - this is the email address from the financial institution who is the originator of the email.
  + Reply To Email Address – this is the email address at the financial institution where the end-user would reply to.
  + Email Schedule - Select when the email will be sent to the end-user after they click a banner.
  + Save - select ‘Save’ to save settings.
  + On/Off - explicitly select ‘On’ to turn it on.

## Build Rule

The Build Rule option is displayed only for Targeted by Rule campaigns. It allows the financial institution a way to create their own rules with ‘AND’ conditions (e.g. Age is 21 and older and they don’t have mortgage). More complex rules cannot be created using this tool and should be requested to be created by DeepTarget.

## Upload List

The Upload List option is displayed only for Targeted by List campaigns. It allows the financial institution to target with a list of end-user ids they have created themselves. The list must be a single-columned .csv file of ids that uniquely identifies the end-users. The ids should be in the same form that they are provided in the data extracts. The column may have a header row.

When selected, a form appears. Click ‘Select File’ to browse for the file name. Select the checkbox if the list has a header row, then click ‘Upload’.

When processing, it checks to see if all of the ids are in the database. A form will be presented showing the match percentage. Don’t be alarmed if the match is not 100%. There could be a difference in the list and the database. If the percentage match is below 90%, there could be a problem with the list and you should contact DeepTarget Support. To complete the process, ‘Continue’.

## Campaign Performance

This option brings up a new window and displays information on how well the campaign is doing in selected time period.

* Impressions (unique) – charts the values for the number of unique impressions shown over time.
* Clicks (unique) – charts the values for the number of unique clicks shown over time.
* Channel – show information for all channels or a specific channel. If you have both OLB and Mobile, you will be able to report by channel type.
* Date Range – enter start/end dates and click ‘Apply’.
* Time Range – select to report results by Hour/Day/Week/Month.
* Gear Icon – select to include particular values to include on the reports. Contact DeepTarget support to add more fields to the selection list.
* Export Data – exports report to an Excel file.
* Export Chart – exports chart to png file.
* Reports are saved to ‘Reports->Downloads’ for 30 days and thereafter deleted.

## Copy Campaign

The Copy Campaign option is used to copy an existing campaign to a new campaign. When copying a campaign, the audience type for the new campaign may be different from the originating campaign. If a Targeted by Rule campaign is copied to another Targeted by Rule campaign, the rule is not copied.

## Delete Campaign

The Delete Campaign option permanently deletes the campaign from the system.

# Reports

## Influenced Conversion Report

The Influenced Conversion report charts the new accounts opened that have been influenced by a view and/or click of a DeepTarget campaign. Individuals who viewed a banner within the last 45 days or clicked on a banner within the last 90 days and then opened an account are included.

Note that Product Assignments need to be set on the campaign in order for the information to be reported on the Influenced Conversions Report.

* + Date Range – enter start/end dates and click ‘Apply’.
  + Filters:
    - Account Type/Product Code
    - Category/Campaign(s)
  + Time Range – select to report results by Hour/Day/Week/Month.
  + Views/Clicks/Both – select to report by views/clicks/both.
  + Gear Icon – select to include particular values to include on the reports. Defaults are Userid and campaign info. Contact DeepTarget support to add more fields to the selection list.
  + Export Data – exports report to an Excel file.
  + Export Chart – exports chart to png file.
  + Reports are saved to ‘Reports->Downloads’ for 30 days and thereafter deleted.
  + Defaults on the Influenced Conversion report include:
    - Product Code
    - Open Date

## Campaign Category Analytics Report

The Campaign Category Analystics report is similar to campaign performance, but it is across all campaigns or within a selected category. Information can be displayed in a Bar Graph or Historical view and in Tabular form. This is one of the most-used features in the application.

* + Date Range – enter start/end dates and click ‘Apply’.
  + Channel/Category – allows you to filter by Channel & Category
  + Compare Channels – allows you to see how well each channel is doing side-by side. This is on the bar-chart view only.
  + Gear Icon – select to include particular values to include on the reports. Defaults are Userid and campaign info. Contact DeepTarget support to add more fields to the selection list.
  + Show Data Labels – check to include labels on the bar graph view.
  + Export Data (Impressions/Clicks) - exports report to an Excel file. Shows products opened, accounts opened, date of first/last impressions/clicks. The unique clicks are leads.
  + Export Chart (Impressions/Clicks) - exports chart to png file.
  + Reports are saved to ‘Reports->Downloads’ for 30 days and thereafter deleted.
  + Exports Table – shows views, clicks and user click %
  + Defaults on the Campaign Category report include:
    - Individual
    - Category
    - Channel
  + Historical View – displays the performance of campaign categories or campaigns over a time period. This graph is similar to the Campaign Performance graph except this chart shows multiple campaigns for the selected time period.
  + Tabular Form – displays the unique impressions/clicks and click through rate at both the campaign and category level.

## Monthly Management Report

The Monthly Management Report encapsulates the user engagement performance results directly related to the digital marketing campaigns published within DeepTarget over the past five (5) calendar months. Refer to the file repository under Support->Downloads for a more in-depth explanation of the fields in the Monthly Management Report.

## Schedule Report

Schedule a Report based on a frequency(daily/weekly/monthly) and select its recipients by email address. The only type of report that can be scheduled is the User Click Report.

## Download Reports

Download Report is a list of downloadable reports created in the last 30 days. Reports over 30 days are automatically deleted.

# Settings

## My Account

Allows you to change your password/security question.

## Instance Settings

* + IP Address Filtering – allows you to filter which IP addresses may access the system. It goes by public IP Address (not private).
  + Manage Account Types – this is one of the most important aspects of the DeepTarget system and it is crucial that the product code mapping is correct. Product code mapping is initially done during the client setup, but it should be reviewed/updated by the financial institution on a quarterly basis as new codes are continually being added to the system. Refer to the file repository under Support->Downloads for a more in-depth explanation of the product codes and product assignments.

## Manage Users

Allows the administrator to manage the system users (i.e. add or remove users) and give them specific roles.

* + Instance User - Has access to this instance only to create and edit campaigns but cannot modify the Instance Settings or other user's settings.
  + Instance Administrator - Same as the Instance User but can modify the Instance Settings such as limiting access based on IP address.
  + Company Administrator – Has ability to do all that the other two roles can plus add, remove, and/or edit all other users' settings in all company instances.

## Opt-Out Users

Sets up a list of individuals who do not want to see banners. When set, they will see the published “Opt-Out” banner. For some FI’s two numbers may have to be entered (one for mobile and the other for online banking). We recommend contacting DeepTarget if a user wants to be opted out.

## Prioritize Campaigns

Applies to targeted and all-users campaigns. Allows you to set priorities on the campaign display and forces a prioritization in the rotation of banners. Prioritization applies across all channels.

## Ad Rotation

The General Settings apply to all channels and allow you to set the maximum number of ads you want to see in a rotation and set the time delay between the ads. Navigation Settings are only for online banking clients. For animated banners, set the duration to be higher than the time it takes the ad to go through the animation.

* + Navigation color - sets the colors of the navigation graphics (circles and arrows)
  + Show circles/arrows - shows or hides the circles/arrows on the display
  + Navigation inside ad - allows you to position the navigation controls inside or outside the bottom edge of the ad

## Speedbump Content

This option defines the content of the message shown on the speedbump form when the speed bump option is selected for a campaign

# Support

## FAQ

This feature contains frequently asked support questions and provides step-by-step solutions.

## Contact

Request professional assistance from the DeepTarget Support Team by filling out a form with your name, email, and phone number.

## Downloads

Contains a file repository with more detailed information on release notes, mobile ad sizes, reports, and product codes/assignments.