DeepTarget Troubleshooting and Support Guide

#####  October 30, 2019

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# Resetting a Client’s Password

There are several ways to reset a password:

* **Client does it themselves:** On the toolbar go to Settings -> My Account -> Change Password.
If they have forgotten their password, click on ‘Forgot Password’ on the login page and then enter the email address and click Submit. They will get an email with a link to reset the password.
* **Client Admin does it:** Ask your Client’s DeepTarget Administrator to reset the password for you.
For Admins: On the toolbar go to Settings -> Manage Users -> Select User -> Reset Password.
* **DeepTarget does it:** Contact support@deeptarget.com and we can reset the password.

# Enabling/Disabling Users

Only Client DeepTarget Administrators or DeepTarget support personnel are eligible to do this.

* **For Admins:** On the toolbar go to Settings -> Manage Users -> Select User -> Enable User/Disable User.
* **DeepTarget does it:** Contact support@deeptarget.com and we can enable/disable the user.

# Adding Variables to Reports

* To add new fields to reports, contact support@deeptarget.com. Exposing variables for reporting must be done by the DeepTarget DBA.

# Adding Fields to Banners

* To add fields to banners, contact support@deeptarget.com. Exposing variables for inclusion on banners must be done by the DeepTarget DBA.

# Campaign is not displaying

* First verify that a banner has been created for that campaign in the appropriate channel (appropriate tab).
* **Expired:** If the campaign has expired it won’t be visible to the end-user. To change the end-date on a campaign, go to the campaign’s flyout and select Campaign Settings. This will bring up the Campaign Settings page. Change/Extend the End date -> Save. Then, publish the campaign.
* **Specific User:** If it is a targeted campaign, verify that the end user matches the rule created or if the user is present in the list uploaded. If you are not able to determine this information, then contact support@deeptarget.com. Send DeepTarget the first name, last name and email address of the user who cannot see the banner.
* **Opted-Out User:** If it is an All Users campaign, verify that the end user is not in the opt-out users list. If the user is not present in the opt-out list, then contact DeepTarget. Send support@deeptarget.com the first name, last name and email address of the user who wants to opt-out.

# List for Targeted by List is not uploading

* Verify that this list is a .csv file and not an Excel spreadsheet.
* If the list has a header, make sure that the header check box is checked while uploading the list.
* Verify if the list has the correct MemberId or AccountId format. Data should not be in scientific notation.
* If the list still won’t upload, contact support@deeptarget.com and send the list the client is using to DeepTarget.

# The percentage match is not 100% when uploading a list

This is not an uncommon occurrence. Sometimes the list has MemberIds/AccountIds that may not yet be in the extracts (depending on when the last extracts were uploaded to DeepTarget).

If the list has a match >= 85% then the list is good to be uploaded. If the match is below 85% then:

* Verify if the list has the correct MemberId or AccountId.
* The list has to be a .csv file not an Excel spreadsheet.
* If the list has a header make sure you select the header check box while uploading the list.
* If the list still is less than 85%, contact support@deeptarget.com and send the list the client is using to DeepTarget.

# Build Rule gets an error

* If an error occurs after building a rule, first logout and try again.
* If the error still occurs, contact support@deeptarget.com

# Build Rule reach is 0

* If the rule shows the potential to reach 0 members, first logout and try again.
* Verify the syntax of the rule.
* If the syntax looks correct, contact support@deeptarget.com.

# Targeted by Rule campaign showing to unexpected individuals

* **Rule may be incorrect:** Go to the campaign and rebuild the rule and test it. If the campaign is still showing to unexpected individuals, contact support@deeptarget.com. Send the user’s details (first name, last name, email address) to DeepTarget.
* **Data discrepancies:** Go to the campaign and rebuild the rule and test it. If the campaign is still showing to unexpected individuals contact support@deeptarget.com. Send the user’s details (first name, last name, email address) to DeepTarget.

# FI gets an OOPS message

* If an ‘OOPs’ error occurs after selecting anything on any page, first logout and try again.
* If it still occurs, contact support@deeptarget.com. Note: Typically, a back-end email message is sent to the DeepTarget Support Desk when an OOPS message occurs.

# Opt-Out User

* Client should first create an Opt-Out campaign. To do this, go to the Campaigns list page and select Add Campaign. Select ‘Opt Out’ as your audience type.
* Create a solid-filled banner (e.g. the background color of your application’s page) for all channels.
* Go to Settings -> Opt-out Users and enter the account number for the end-user who wants to be opted out. Verify that the number matches the data.
* Call DeepTarget (256.217.4055) for verification of the account number.

# Click Setting is not going to the correct URL

* In the banner editor, make sure that the Click Setting is specifying the correct URL (copy & paste generally takes care of this).
* Test the URL in banner editor.
* If the above steps do not correct the issue, contact support@deeptarget.com
* Note: Any campaign having a banner that the user is expected to click on should have the URL set.

# First name not showing on a personalized banner

* Go to Ad Settings for the campaign and make sure the check box for Prepend First Name is checked for the appropriate text box.
* If the above step does not correct the issue, contact support@deeptarget.com

# How to use Campaign Audience Types

* **Targeted by Rule** - a targeted campaign that shows to those individuals who meet the criteria of the campaign’s rule. Clients can create a rule by either using the Build Rule capability on the campaign flyout or submitting a Rule Request (for DeepTarget to code) by going to the Request Rule tab in Campaign Settings. The client can create a rule with any of the fields that are in the data extracts. As each new data extract is uploaded, the campaign’s reach is automatically updated for those qualifying individuals.
* **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. Clients create their own segmented list. If a new list is uploaded for a targeted by list campaign, it overwrites the previous list.
* **All Users** – a targeted campaign that shows to all current individuals. There should always be at least one All Users campaign running at all times in all channels.
* **Non-Targeted** – a non-targeted campaign that only 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 at all times.
* **Opt-Out** – a targeted campaign that is infrequently used. This is for those individuals who call the financial institution and say they don’t want to see any ads. If this occurs, then go to the toolbar and select ‘Settings->Opt Out Users’. A pop-up box comes up and you would type in the Account ID of the end-user wishing to opt-out. An Opt-out banner can be blank or say something like ‘Thanks for being a customer’, etc.
* **Global Override** – 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. This audience type is generally used for emergency messages or for holiday closings.

# Prioritization not giving the expected results

* Make sure Prioritization is set up correctly in Settings->Prioritize Campaigns.
* Check Settings->Ad Rotation to make sure they have it set the way they intended to use it with Prioritization
* Prioritization works in 20 minutes intervals. Have the client check 20 minutes after they reported the issue and see if they just logged in multiple times during that 20- minute period.
* Make sure the banners that are prioritized have the correct start/end dates.
* Contact support@deeptarget.com if the above steps do not work.

# Mobile banner sizes and densities

* + The mobile banner size chart is located under the Mobile Ad Sizes folder found under Support->Downloads (Resources). There should always be a banner of 320x50 created for the mobile channel.
	+ A density of 2x is recommended for all mobile banners. This density has the best mix of resolution and display timee. When creating a mobile banner in pixels, multiply size in the mobile size chart by the density (e.g. a 320x50 banner at a 2x density should be created at 640x100 pixels).
	+ Mobile banners can be .jpeg, .png, .gif, animated .gif, or HTML.

# HTML and Interstitial Banners

* + Interstitial banners can only be HTML. They can either be a single HTML file or a zip file comprising of only one HTML file along with other supporting images and files.
	+ To include the interstitial campaign’s performance data in the DeepTarget analytics tool, make sure to include the code snippet for the click zones. Refer to Support->Downloads (Resources) for HTML and Interstitial documentation.
	+ Contact support@deeptarget.com for any other questions concerning interstitial banners.

# Scheduled Report not being received

* + Make sure the email addresses for the recipients are correct.
	+ Determine if the client’s data extracts are being uploaded at the same time they are expecting to receive the report.
	+ Contact support@deeptarget.com if the above steps do not solve the issue.

# Notification email not being received or information not showing on the email

* + Make sure the recipient email addresses are correct.
	+ Make sure there is information in the Notification Email Body.
	+ Make sure that the Save Button was clicked to save any changes.
	+ Make sure the ON button is explicitly turned on.
	+ Contact support@deeptarget.com if the above steps do not solve the issue.

# Click to Email not working

* + Make sure there all email information has been entered.
	+ Make sure that the Save Button was clicked to save any changes.
	+ Make sure the ON button is explicitly turned on.
	+ Contact support@deeptarget.com if the above steps do not solve the issue.

# Ad Rotation – Recommendations

* Under Settings -> Ad Rotation, set the number to at least 3 (but it can be greater) with a delay of 7 seconds. This gives the end-user enough time to process the ad before a new ad is presented.
* The delay is in seconds, so set it so that the any animated banners can complete before it rotates to the next ad.

# Speedbump Setup

* + This functionality is not available for all platforms. Contact support@deeptarget.com to find out if your platform is supported.
	+ This functionality is available for the online banking channel only.
	+ Go to Settings->Speedbump to create the message you want the end-user to see when they click on an ad that takes them outside the client’s website.
	+ For campaigns having online banking ads that will redirect them outside the client’s website, make sure the check box for the Speedbump is checked within Ad Settings.

# Product Code Mapping

* + The document in the Product Codes and Product Assignments folder in Support->Downloads (Resources) contains instructions on how to map product codes from the data extracts into the DeepTarget categories and how to assign product code(s) to a campaign.
	+ If a client has modified the product code mappings or product assignments, please notify support@deeptarget.com so that stacks can be generated/uploaded again.

# Campaign Product Assignments

* + The document in the Product Codes and Product Assignments folder in Support->Downloads (resources) contains instructions on how to map product codes from the data extracts into the DeepTarget categories and how to assign product code(s) to a campaign.
	+ If a client has modified the product code mappings or product assignments, please notify support@deeptarget.com so that stacks can be generated/uploaded again.

# How long can I report statistics?

* DeepTarget stores performance statistics data up-to two years for the campaigns.

# Archiving campaigns

* + It is not possible to archive campaigns in DeepTarget. However, you can keep campaigns in an unpublished state over longer periods of time.

# Campaign Settings Collect Metrics on Campaign

* + Under the Campaign Setting option on the campaign fly-out menu, you can select/deselect the ‘Collect metrics on this campaign’ checkbox. This allows clients to include/exclude a campaign’s statistics data (clicks and impressions) to be considered against the dashboard metrics and the monthly management report metrics. It is recommended to uncheck the checkbox for a generic informational campaign who’s clicks are irrelevant to the client.

# KEI/KMI

* + Refer to the DeepTarget Reports folder under Support->Downloads to download the DeepTarget\_Management\_ Report.pdf document by right clicking on it. This document explains the KEI/KMI and how they are calculated.

# Copy Campaign

* + To copy a campaign, go to the ‘Copy Campaign’ feature on the campaign fly-out menu. Copy campaign allows the user to emulate the banner of an existing campaign to a new campaign while allowing them to change the Audience Type of the newly created campaign. However, the restriction of this feature is that an existing rule (in case of a Target by Rule campaign) or an existing list (in case of a Target by List campaign) is not copied to the new campaign.

# Mobile Ads showing white space to the left/right of the ad

* + This issue is generally seen on Android devices. The white space can be removed by setting the Backdrop color in the banner editor for any campaign to the color of the app background. This will camouflage the white space and remove the ‘letter box effect’ for your mobile banners.
	+ This is not applicable to Cathedral.

# ADA Setup

* + To set up text to be read aloud to end-users who have screen readers, enter information in the ADA text field under Campaign Settings.
	+ The ADA text field under Campaign Settings does not allow special characters like commas (,), semi-colons (;), quotes (‘), double quotes (“) and others. This causes the banner image to break and not show up on your channel.

# De-Targeting – Recommendations

* + This functionality temporarily deactivates campaigns for individual users who are not engaging with the campaign at that point in time. Refer to the Support>Downloads (Resources) section for more information on De-Targeting.

# Data Extract Upload Issues

* + DeepTarget will notify Cathedral if there is a problem with the client’s data extracts.
	+ DeepTarget will provide Cathedral the client name and the data upload issue. Cathedral will be the POC for the client.

# Secure Data Extractor (SDE) – used for Notification Email

* + When a client uses the Notification Email functionality, there is an option to put the contents within a secure tag. The email that goes to the recipient will have the contents within that secure tag encrypted. DeepTarget will supply each client recipient with software to decrypt the information.
	+ The client/Cathedral will need to inform DeepTarget that they require the SDE. Each individual who will use the SDE will need to be approved by DeepTarget.
	+ Contact support@deeptarget.com to have this set up for a client.

# Banner not uploading

* + **Restriction on size** – DeepTarget allows the image size for a banner to be up to 3 MB. Please reach out to support@deeptarget.com if this cap needs to be increased for any specific client.
	+ **Pixel dimensions of banner are not the same as the specified size** - Check if the dimensions of the image are the same as the banner size selected.
	+ **Image type is different** – Make sure the client is uploading a jpeg, gif, animated gif or HTML banner. For HTML/Interstitial banners, only an HTML may be uploaded.

# Influenced Conversion Report has no data

* + Ensure that the campaigns that are intended to open new accounts have product code assignments set properly.
	+ Check to see if any product codes have not been mapped to a DeepTarget category. (Settings->Instance Settings->Manage Account Types). These codes need to be mapped and stacks uploaded by DeepTarget.
	+ Check to see if the accounts in the data extract have incorrect data (e.g. account open date is not included).
	+ If the above items all look correct, contact support@deeptarget.com to request further investigation.

# Exporting Report Error

* + Data extracts may still be processing.
	+ Data extracts may have an error.
	+ Check to see if any product codes have not been mapped to a DeepTarget category. (Settings->Instance Settings->Manage Account Types). These codes need to be mapped and stacks uploaded by DeepTarget.
	+ Ensure that the campaigns that are intended to open new accounts have product code assignments set properly.
	+ Contact support@deeptarget.com for assistance. The UserIdRelationship field may be empty in the database.