Advertising Services

Deployment Guide

Revision 1.3

24 September 2010

United States of America
  +1 (888) 590-0882

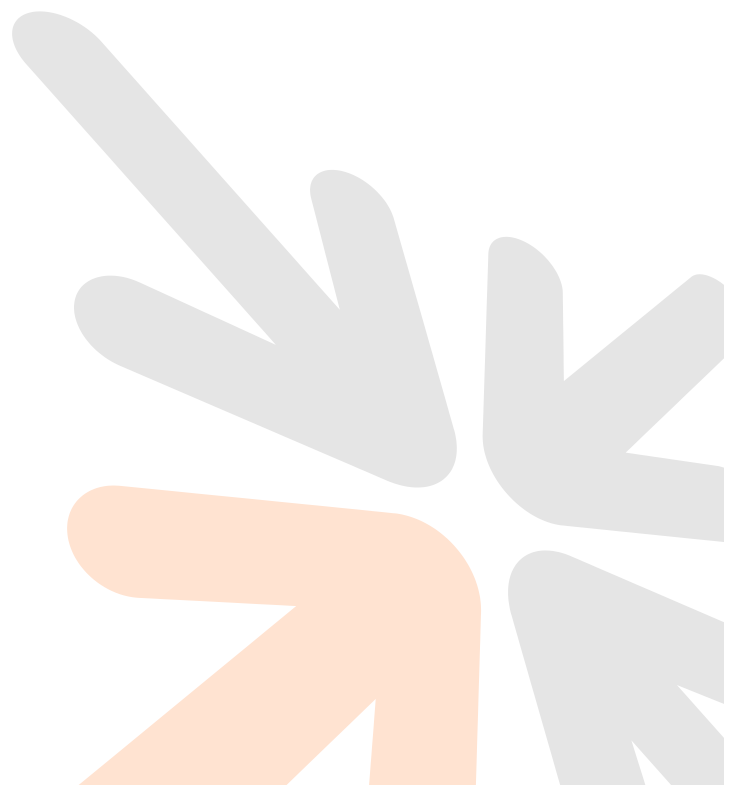Europe, Middle East & Asia
  +34 91 766 57 22

Australia & Pacific
  +61 2 8669 1140

http://www.amigopod.com

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1   Advertising Services Overview

The amigopod Advertising Services plugin enables you to deliver marketing promotions and advertisements to the users of your network. Advertisements can be delivered to users at various stages, such as when they:

- Register or login using a web-browser,
- Receive a registration receipt via email, or
- Receive a registration receipt via SMS.

Advertising Services is able to deliver advertisements using a number of different formats, including:

- Images
- YouTube videos
- Text (Web / SMS)
- Flash
- Raw HTML

Advertising Services uses a few key components to achieve these capabilities. These key components are called:

- Pages
- Spaces
- Campaigns
- Promotions
- Materials
- Reports

Materials are the actual advertisements that are delivered. They can be web advertisements (such as images, FLASH animations, YouTube videos, HTML, or text) or they can be SMS advertisements.

Promotions group your materials (advertisements) and apply rules regarding how to deliver them.

The **full edition** of Advertising Services also provides **intelligent promotions**. An **intelligent promotion** is able to use information provided by the user (e.g. gender, age group, personal interests) to select advertisements that have greater personal relevance.

Campaigns organize, prioritize and time the delivery of promotions and their associated materials.

Spaces determine where on a page advertisements will be placed. Spaces also use some simple rules to select appropriate advertisements; rules that determine the size, format and number of materials to be delivered.

Pages represent various pages, provided by the amigopod system, on which advertising is supported and allowed. These pages include login, registration, receipt and self-service pages, as well as email and SMS receipts.

Reports can be used to investigate the demographics of your users, and to review the delivery of your advertisements.

The Advertising Services plugin is available in two editions:

- Lite Edition

- Full Edition

A comparison of the features provided by each edition is as follows:

Table 1: Comparison of Advertising Services Editions

Feature	Lite	Full
Unlimited advertising materials	✔	✔
Unlimited advertising promotions	✔	✔
Unlimited preview reports	✔	✔
Configurable advertising spaces	✔	✔
Configurable advertising pages	✔	✔
Intelligent promotions (demographic-based advertising)		✔
Unlimited advertising campaigns		✔
Custom advertising spaces		✔
Additional campaign & space controls for pages		✔

1.1   About this manual

This deployment manual is intended for system administrators and the persons installing and configuring **Advertising Services** on an **amigopod Visitor Management Appliance**.

1.1.1   Document conventions

Field names are shown in bold:

Content Types

Field values are shown in italics:

Materials only

The navigation path to a page is specified within parentheses with each path component separated by a double right-arrow:

Navigate to the advertising pages list (Advertising Services » Pages).

Link, tab and button names are shown in bold, preceded by the appropriate icon:

💾 **Save Changes**

Code samples are shown in a fixed-width font:

```
Sample template code or HTML text
```

Information of note is indicated by **NOTE** in the margin.

Important information is indicated by **IMPORTANT** in the margin.

✓ **BEST PRACTICE**
A best practice contains recommendations for how to best use a given feature.

1.1.2   Document overview

This deployment guide contains the following sections:

- Section 1 – Advertising Services Overview: A brief overview of the capabilities of the amigopod Advertising Services plugin.

- Section 2 – Example Deployment of Advertising Services: An example use case that will help to illustrate some of the ways in which Advertising Services can be used.

- Section 3 – Advertising Deployment Workflow: Detailed instructions on how to customize Guest Manager forms and configure Advertising Services to achieve the example scenario described in section 2.

- Section 4 – Advertising Services Reference: Detailed information on each of the components provided by the Advertising Services plugin.

- Section 5 – Gathering User Information: A general discussion on how to gather information from users that can then be used to provide more personally relevant advertisements.

1.2   Other resources

There are a number of other recommended resources:

amigopod Deployment Guide: This guide is recommended reading for system administrators who need guidance on how to install and configure an amigopod for visitor management.

NOTE To access the amigopod Deployment Guide, navigate to the support services documentation page (Support Services » Documentation) on your amigopod. From there you may browse, search or download (in PDF format) the document.

Integration Guides: amigopod provide a number of integration guides to help system administrators with the process of integrating an amigopod with other vendor-specific equipment, including: Aerohive, Aruba, Bluesocket, Cisco, Colubris, D-Link, HP, Trapeze, Trendnet, Xirrus and others.

NOTE   Please contact your sales representative, or amigopod support staff at support@amigopod.com, for a copy of the relevant integration guide.

Getting Started Interactive Tutorial: The Advertising Services plugin has an interactive tutorial that will lead you, step by step, through a simple configuration example. Navigate to the Advertising Services start page (Advertising Services » Start Here) on your amigopod, and click the **Getting Started** command link.

2   Example Deployment of Advertising Services

NOTE   To better understand some of the capabilities provided by the Advertising Services plugin and how to implement them, we will describe an example deployment scenario. The next section (§3) will provide detailed instructions on how to configure Advertising Services to implement this example scenario.

The ACME Company manages a number of large shopping centers. As part of its program to upgrade the services it provides to retailers and customers, it is installing a guest WiFi network. One of the objectives of this network is to provide Internet access for shoppers. ACME will use an amigopod to manage **guest access** and to deliver **advertising** to shoppers as they log into the network.

The retailers in the ACME shopping centers cover various demographics. Some retailers provide products with broad appeal (e.g. groceries), while others target particular segments of the market (e.g. young women's fashion).

ACME will use the amigopod's advertising **intelligence** technology to provide shoppers with **relevant** advertising. Using the free WiFi network, ACME is able to provide retailers with a new service: **demographic advertising**.

The service that ACME provides to retailers allows the retailers to deliver **video**, **Flash**, **image**, **text** and **SMS advertisements** to shoppers, and if desired, to have their advertisements directed to any of the demographic groups that ACME makes available via the amigopod.

Some examples of the groups that retailers can choose for directing their advertisements are included in Table 2 below. Using the amigopod, ACME can easily add more groups as required.

Table 2: Example Advertising Groups (defined by ACME)

Gender	Age		Personal Interests	
Male	0 to 19	20 to 29	Entertainment	Fashion
Female	30 to 39	40 to 49	Food	Homewares
	50 to 59	60 to 69	Jewelry	Music
	70+		Reading	Sport
			Technology	

A sample of three retailers using the advertising service (see Table 3 below) shows (i) a fashion retailer who focuses on the under 30 female demographic, (ii) a sporting goods retailer targeting the 20 to 40 age group, and (iii) a hi-fi audio retailer catering mostly to males in the 30 to 49 age group.

Table 3: Example Retailers and Priority Demographics

Retailer	Priority Demographics
Catwalk Fashion	Female, 0 to 19, 20 to 29, Fashion
Guerrilla Sport	Male, Female, 20 to 29, 30 to 39, Sport
Gold Wire Audio	Male, 30 to 39, 40 to 49, Music, Technology

Using the amigopod, ACME is able to maximize the exposure of each retailer to their priority demographics.

For example, a shopper, let's call her Sarah, is a 22 year-old female whose personal interests are fashion and reading. Sarah would receive more advertisements from Catwalk Fashion, than Guerrilla Sport or Gold Wire Audio.

Another shopper, let's call him Bradley, is a 34 year-old male whose personal interests are sport, music and technology. Bradley would receive more advertisements from Gold Wire Audio and Guerrilla Sport than from Catwalk Fashion.

Table 4: Example Shoppers

Shopper	Demographic	Advertising Priority
Sarah	Female, 20 to 29, Fashion, Reading	1. Catwalk Fashion 2. Guerrilla Sport 3. Gold Wire Audio
Bradley	Male, 30 to 39, Sport, Music, Technology	1. Gold Wire Audio 2. Guerilla Sport 3. Catwalk Fashion

The following section will now use this example scenario to illustrate a common workflow that is used when deploying advertising services.

3   Advertising Deployment Workflow

There is a workflow that is commonly used in the deployment of advertising services:

1. Configure guest access – the first step in the process is to configure the system to support guest access. To complete this step, you will need to follow the instructions in the relevant **integration guide** for you network and in the **amigopod Deployment Guide**.

2. Guest demographics – in this step, the guest self-registration forms are extended with extra fields that are used for gathering the desired demographic information from guests.

3. General advertising configuration – here the general structure of your advertising is put in place: which pages will show advertising and at which stages of the login process, and also where on the pages will advertising be shown.

4. Uploading and defining advertisements – in this step, your first round of advertising materials are uploaded to the amigopod.

Configure guest access

Define guest demographics

Configure advertising

Define advertising materials

Fine-tune advertising delivery

5. Fine-tuning delivery – finally, you may modify the configuration to improve the user experience in subtle but effective ways: use separate advertising spaces for images and text, or stop overloading the user with videos by only showing them before login.
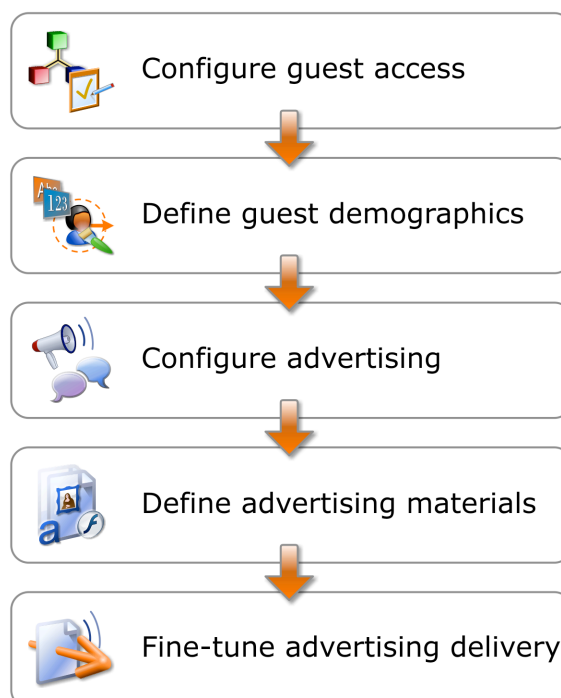
During the discussion of this workflow, we will refer to the ACME shopping centers example, which was presented in section 2 above. Stepping through this workflow (or simply reading through it) will help you to see how to achieve the required behavior using the amigopod and the Advertising Services plugin.

You may then adapt this workflow to your own needs to achieve your required behavior.

3.1   Configure guest access

To support guest access, you will need to configure your amigopod to communicate with your vendor's network equipment (e.g. a Network Access Server).

Such an integration exercise is highly dependent upon the devices in your network, and as such is beyond the scope of this document. Amigopod provide a number of **integration guides** to assist you in configuring an amigopod for interoperability with various vendors, including: Aerohive, Aruba, Bluesocket, Cisco, Colubris, D-Link, HP, Trapeze, Trendnet, Xirrus, and others.

Please contact your sales representative, or amigopod support staff at support@amigopod.com, for a relevant integration guide.

You may also wish to review the **amigopod Deployment Guide** for general deployment and reference purposes. The guide is available through your amigopod as online documentation or as a download (Support Services » Documentation).

3.2   Guest demographics

Assuming that you have basic guest access configured, it is time to modify the **Guest Self-Registration** forms to gather extra demographic information. This demographic information will then be used by the advertising system to prioritize the selection of advertisements.

IMPORTANT   For prioritizing the selection of advertisements based on user information, you will need to configure an **intelligent promotion** (§3.3.4), which requires the **full edition** of Advertising Services.

Remember our example shoppers from section 2 above:

- Sarah – female, 20 to 29, fashion and reading
- Bradley – male, 30 to 39, sport, music and technology

To be able to provide Sarah and Bradley with relevant advertisements, we first need to gather information from them that will help the system to better choose advertisements for them.

This section will instruct you on how to customize the **Guest Self-Registration** form so that you can gather the relevant information. We will use, as an example, the demographic groups from the ACME example outlined in section 2.

We will create the fields listed in Table 5 below. Each field will have a name, a discrete number of allowed responses, a specific type of user interface control, and will result in a discrete number of *user labels*.

IMPORTANT   When a user chooses one of the allowed responses, they will be labelled with the associated *user label*. This *user label* will be used by an **intelligent promotion** to match the user to personally relevant advertisements.

Table 5: Example Custom Fields

Name	Allowed Responses	User Interface Control	Resultant User Labels
gender	Female Male	Radio buttons	gender Female gender Male
age_group	0 to 19 20 to 29 30 to 39 40 to 49 50 to 59 60 to 69 70+	Dropdown	age_group 0 to 19 age_group 20 to 29 age_group 30 to 39 age_group 40 to 49 age_group 50 to 59 age_group 60 to 69 age_group 70+
interests	Entertainment (yes/no) Fashion (yes/no) Food (yes/no) Homewares (yes/no) Jewelry (yes/no) Music (yes/no) Reading (yes/no) Technology (yes/no)	Checklist	interests Entertainment Yes/No interests Fashion Yes/No interests Food Yes/No interests Homewares Yes/No interests Jewelry Yes/No interests Music Yes/No interests Reading Yes/No interests Technology Yes/No

The following sections will show you how to create each of these custom fields and then how to add them to the **Guest Self-Registration** form.

3.2.1 Creating a gender field (radio buttons)

IMPORTANT This is an example only. You may follow these instructions if you wish to gather gender demographic information. Otherwise, you can simply read this section to gain a greater understanding of the system.

To create a **gender** field for use in a **Guest Self-Registration** form:

1. Navigate to the customize fields list (Guest Manager » Customization » Customize Fields).

2. Click the ⊕ **Create** tab link; the create field editor will be shown.

3. Enter the **Field Name** for the custom field: *gender*

4.   Select the **Field Type** dropdown and choose the *String* option.

5.   Enter the following text into the **Description** field:
Gender of the user.

Apply the following settings to the **Default View Display Settings** section:

6.   Select the **Content Type** dropdown and choose the *Sortable text* option.

7.   Enter a **Column Title** of: *Gender*

8.   Leave the **Column Width** at its default setting of: *100*

9.   Leave the **CSS Class** field empty.

10. Leave the **CSS Style** field empty.

11. Select the **Column Format** and select the *Field Value* option.

12. Leave the **Search** checkbox, *Include values when performing a quick search*, as **not** ticked.

Apply the following settings to the **Default Form Display Settings** section:

13. Select the **User Interface** dropdown and choose the *Radio buttons* option.

14. Enter a **Label** of: *Gender:*

15. Enter a **Description** of: *Please select your gender.*

16. Leave the **CSS Class** field empty.

17. Leave the **CSS Style** field empty.

18. Leave the **Legend** field empty.

19. Select the **Options Generator** dropdown and choose the *Use options* option.

20. Enter the following text into the **Options** field:
    female|Female
    male|Male

21. Select the **Sort** field and choose the *No sorting* option.

22. Leave the **Collapse** checkbox, *Hide when no options are selectable*, as **not** ticked.

23. Select the **Layout** dropdown and choose the *Vertical* option.

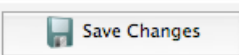Apply the following settings to the **Form Validation Settings** section:

24. Ensure that the **Field Required** checkbox, *Field value must be supplied*, is **ticked**.

25. Enter an **Initial Value** of: *none*

26. Select the **Validator** dropdown and choose the *IsArrayValue* option.

27. Select the **Validator Param** dropdown and choose the *None* option.

28. Enter the following text into the **Validator Argument** field: *array('female','male')*

29. Enter a **Validation Error** message of: *You must choose one the options provided.*

Apply the following settings to the **Advanced Properties** section:

30. Leave the **Advanced** checkbox, *Show advanced properties*, as **not** ticked.

31. Enter a **Type Error** message of: *You must choose one the options provided.*
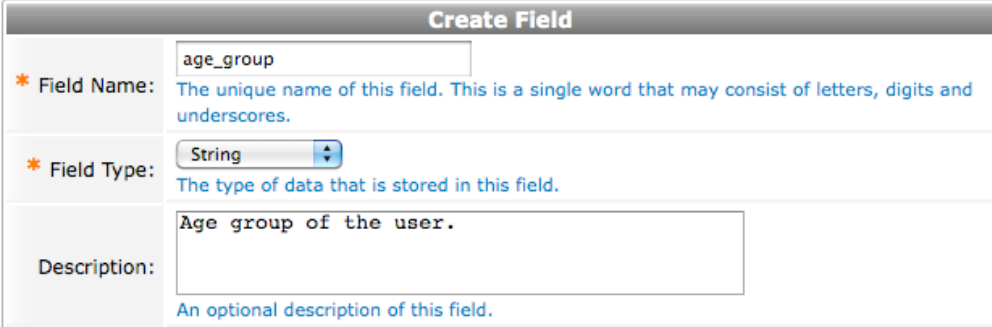
And then to save the field:

* required field

32. Review your settings and ensure they are as directed.

33. Click the 💾 **Save Changes** button; the custom field will be created and the tab form collapsed.

3.2.2   Creating an age group field (dropdown)

This is an example only. You may follow these instructions if you wish to gather gender demographic information. Otherwise, you can simply read this section to gain a greater understanding of the system.

To create an **age_group** field for use in a **Guest Self-Registration** form:

1. Navigate to the customize fields list (Guest Manager » Customization » Customize Fields).

2. Click the 🔧 **Create** tab link; the create field editor will be shown.

3. Enter the **Field Name** for the custom field: *age_group*

4. Select the **Field Type** dropdown and choose the *String* option.

5. Enter the following text into the **Description** field:
   Age group of the user.

Apply the following settings to the **Default View Display Settings** section:

Default View Display Properties
These options control the default values when used in a column.

Column Type:	Sortable text
	Type of column used to display this field.
Column Title:	Age Group
	The title text to display for this field's column.
Column Width:	100
	The default width of this field in pixels.
CSS Class:	
	Optional CSS class name to apply to this form field.
CSS Style:	
	Optional CSS style text to apply to this form field.
Column Format:	Field Value
	Describe how the value should be displayed onscreen.
Search:	☐ Include values when performing a quick search
	Many views include an ability to filter results. If checked, and this field is enabled, it will be included in the search.

6. Select the **Content Type** dropdown and choose the *Sortable text* option.

7. Enter a **Column Title** of: *Age Group*

8. Leave the **Column Width** at its default setting of: *100*

9. Leave the **CSS Class** field empty.

10. Leave the **CSS Style** field empty.

11. Select the **Column Format** and select the *Field Value* option.

12. Leave the **Search** checkbox, *Include values when performing a quick search*, as **not** ticked.

Apply the following settings to the **Default Form Display Settings** section:

Default Form Display Properties
These properties control the default user interface displayed for this field.

User Interface:	Drop-down list
	The kind of user interface element to use when entering or editing this field.
Label:	Age Group:
	Label for this field to display on the form.
Description:	Please select your age group.
	Descriptive text for this field, displayed with the user-interface element.
CSS Class:	
	Optional CSS class name to apply to this form field.
CSS Style:	
	Optional CSS style text to apply to this form field.
Options Generator:	(Use options)
	The function used to generate the list of available options.
Options:	none|Select your age group... 1|0 to 19 2|20 to 29 3|30 to 39
	List of options available. Enter one or more lines containing 'key | value' pairs, where the key and value are separated with a vertical bar |.
Sort:	No sorting
	Method to use to sort the available options.
Collapse:	☐ Hide when no options are selectable
	Select this option to automatically hide the form field when only one choice is available.

13. Select the **User Interface** dropdown and choose the *Drop-down list* option.

14. Enter a **Label** of: *Age Group:*

15. Enter a **Description** of: *Please select your age group.*

16. Leave the **CSS Class** field empty.

17. Leave the **CSS Style** field empty.

18. Leave the **Legend** field empty.

19. Select the **Options Generator** dropdown and choose the *Use options* option.

20. Enter the following text into the **Options** field:
    none|Select your age group...
    1|0 to 19
    2|20 to 29
    3|30 to 39
    4|40 to 49
    5|50 to 59
    6|60 to 69
    7|70+

21. Select the **Sort** field and choose the *No sorting* option.

22. Leave the **Collapse** checkbox, *Hide when no options are selectable*, as **not** ticked.

Apply the following settings to the **Form Validation Settings** section:

Form Validation Properties
These properties control how the value of this field is checked.

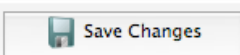|	
Field Required:	☑ Field value must be supplied Select this option if the field cannot be omitted or left blank.
Initial Value:	none Value to initialize this field with when the form is first displayed.
Validator:	IsArrayValue The function used to validate the contents of a field.
Validator Param:	(None) Optional name of field whose value will be supplied as the argument to a validator.
Validator Argument:	array('1','2','3','4','5','6','7') Optional value to supply as the argument to a validator.
Validation Error:	You must choose one the options provided. The error message to display if the field's value fails validation and the validator does not return an error message directly.

23. Ensure that the **Field Required** checkbox, *Field value must be supplied*, is **ticked**.

24. Enter an **Initial Value** of: *none*

25. Select the **Validator** dropdown and choose the *IsArrayValue* option.

26. Select the **Validator Param** dropdown and choose the *None* option.

27. Enter the following text into the **Validator Argument** field: *array('1','2','3','4','5','6','7')*

28. Enter a **Validation Error** message of: *You must choose one the options provided.*

Apply the following settings to the **Advanced Properties** section:

Advanced Properties
These properties control conversion, display and dynamic behaviours.

Advanced:	☐ Show advanced properties
Type Error:	You must choose one the options provided. The error message to display if the field's value is not supplied, has an incorrect type, or if conversion fails.

29. Leave the **Advanced** checkbox, *Show advanced properties*, as **not** ticked.

30. Enter a **Type Error** message of: *You must choose one the options provided.*
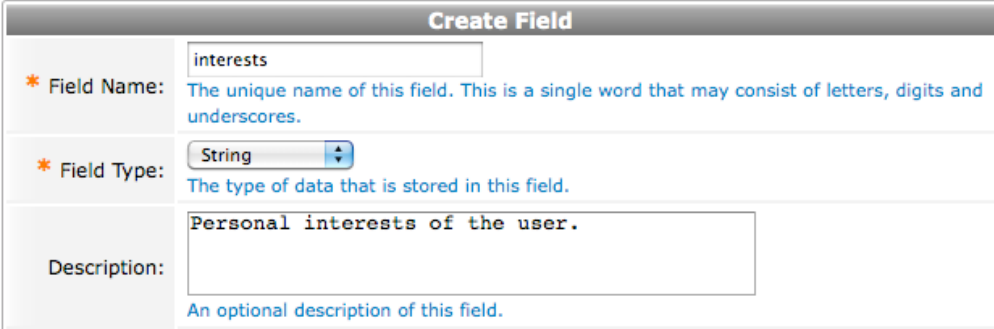
And then to save the field:

31. Review your settings and ensure they are as directed.

32. Click the 💾 **Save Changes** button; the custom field will be created and the tab form collapsed.

3.2.3   Creating a personal interests field (checklist)

IMPORTANT   This is an example only. You may follow these instructions if you wish to gather gender demographic information. Otherwise, you can simply read this section to gain a greater understanding of the system.

To create an **interests** field for use in a **Guest Self-Registration** form:

1. Navigate to the customize fields list (Guest Manager » Customization » Customize Fields).

2. Click the 🌱 **Create** tab link; the create field editor will be shown.

3. Enter the **Field Name** for the custom field: *interests*

4. Select the **Field Type** dropdown and choose the *String* option.

5. Enter the following text into the **Description** field:
   Personal interests of the user.

Apply the following settings to the **Default View Display Settings** section:

6. Select the **Content Type** dropdown and choose the *Sortable text* option.

7. Enter a **Column Title** of: *Interests*

8. Leave the **Column Width** at its default setting of: *100*

9. Leave the **CSS Class** field empty.

10. Leave the **CSS Style** field empty.

11. Select the **Column Format** and select the *Field Value* option.

12. Leave the **Search** checkbox, *Include values when performing a quick search*, as **not** ticked.

Apply the following settings to the **Default Form Display Settings** section:

13. Select the **User Interface** dropdown and choose the *Checklist* option.

14. Enter a **Label** of: *Interests:*

15. Enter a **Description** of: *Please select the things you are interested in.*

16. Leave the **CSS Class** field empty.

17. Leave the **CSS Style** field empty.

18. Leave the **Legend** field empty.

19. Select the **Options Generator** dropdown and choose the *Use options* option.

20. Enter the following text into the **Options** field:
    entertainment|Entertainment
    fashion|Fashion
    food|Food
    homewares|Homewares
    jewelry|Jewelry

music|Music
reading|Reading
technology|Technology

21. Select the **Sort** field and choose the *No sorting* option.

22. Leave the **Collapse** checkbox, *Hide when no options are selectable*, as **not** ticked.

23. Select the **Layout** dropdown and choose the *Vertical* option.

24. Enter a **Vertical Columns** of: *2*

Apply the following settings to the **Form Validation Settings** section:

Form Validation Properties
These properties control how the value of this field is checked.

Field Required:	☐ Field value must be supplied
	Select this option if the field cannot be omitted or left blank.
Initial Value:	
	Value to initialize this field with when the form is first displayed.
Validator:	(No validation) ▲▼
	The function used to validate the contents of a field.

25. Ensure that the **Field Required** checkbox, *Field value must be supplied*, is **not** ticked.

26. Leave the **Initial Value** field empty.

27. Leave the **Validator** dropdown with the default option of: *No validation*
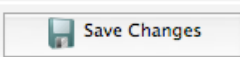
Apply the following settings to the **Advanced Properties** section:

Advanced Properties
These properties control conversion, display and dynamic behaviours.

Advanced:	☑ Show advanced properties
Conversion:	NwaImplodeComma ▾ The function used to convert an incoming field value prior to validation.
Type Error:	The error message to display if the field's value is not supplied, has an incorrect type, or if conversion fails.
Value Format:	(None) ▾ The function used to format a field value after validation.
Display Function:	NwaExplodeComma ▾ The function used to convert a field to a displayable value on the form.
Display Param:	interests Optional name of field whose value will be supplied as the argument to a display function.
Display Arguments:	Optional value to supply as the argument to a display function.
Static Display Function:	(None) ▾ The function used to convert a static field to a displayable value on the form.
Force Value:	☐ Always use initial value on form submit Sets the field's value to the initial value specified above when the form is submitted. Use this option when the field must have a certain value that cannot be overridden by a user.
Enable If:	Javascript conditional expression for this field's enabled property. The expression 'f.value' returns the in-form value of field 'f'.
Visible If:	Javascript conditional expression for this field's visibility. The expression 'f.value' returns the in-form value of field 'f'.

28. Change the **Advanced** checkbox, *Show advanced properties*, to be **ticked**.

29. Select the **Conversion** dropdown and choose the *NwaImplodeComma* option.

30. Leave the **Type Error** field empty.

31. Select the **Value Format** dropdown and choose the *None* option.

32. Select the **Display Format** dropdown and choose the *NwaExplodeComma* option.

33. Enter a **Display Param** of: *interests*

34. Leave the **Display Arguments** field empty.

35. Select the **Static Display Function** dropdown and choose the *None* option.

36. Leave the **Force Value** checkbox, *Always use initial value on form submit*, as **not** ticked.

37. Leave the **Enable If** field empty.

38. Leave the **Disable If** field empty.

And then to save the field:

* required field

39. Review your settings and ensure they are as directed.

40. Click the 💾 **Save Changes** button; the custom field will be created and the tab form collapsed.

3.2.4 Adding the custom fields to your registration form

Having created the **gender** field (§3.2.1), it can now be added to the **Guest Self-Registration** form. To add the field to the form:

1. Navigate to the guest self-registration list (Guest Manager » Customization » Guest Self-Registration).

2. Click on the row containing the **Guest Self-Registration** page to which you will add the **gender** field; an *action row* will be shown containing a number of action links you can click.

3. Click the 📝 **Edit** link; the guest self-registration process editor will be shown.

4. Click the ▤ **Form** link associated with the *Register Page*; the customize form fields list will be shown.

5. Click the field after which the **gender** field is to be inserted. For example, click the **email** field; an *action row* will be shown containing a number of action links you can click.

6. Click the 📥 **Insert After** action link; the customize form field editor will be shown.

7. Select the **Field Name** dropdown and choose the *gender* option.

8. Ensure that the **Field** checkbox, *Enable this field*, is **ticked**.

9. Click the 💾 **Save Changes** button; the field will be added to the form and you will be directed back to the customize form fields list.

Repeat the above steps for both the **age_group** and the **interests** custom fields.

To view the new custom fields in the form, click the 🔳 **Preview Form** tab link.

3.2.5   Double check your intelligent delivery labels

IMPORTANT   Intelligent delivery features are only available in the **full edition** of Advertising Services. Ignore these instructions if you are using the **lite edition**.

Now that a number of custom fields have been created, the system will be able to use their options as *labels* for the **intelligent delivery** of advertising.

To see what *labels* the system will use for intelligent delivery, navigate to the promotion editor and review the **Defined Labels** list:

1. Navigate to the promotions list (Advertising Services » Promotions).

2. Click the 📣 **Create new advertising promotion** link located above the promotions list; the promotion editor will be shown.

3. In the **Intelligence** section, changed the **Enabled** checkbox, *Enable intelligent delivery*, to be **ticked**; more fields will be shown in the **Intelligence** section.

4. Review the **Defined Labels** list, in particular the user labels listed in the **Defined User Labels** column.

NOTE   Do not save or create the promotion.

3.2.6   Capturing other guest information using custom fields

If you wish to gather other guest information, you can add more custom fields as necessary. For further details on custom fields and how to use them to gather guest information, see section 5 below.

You may also wish to refer to the **amigopod Deployment Guide** (§1.2).

3.3   General advertising configuration

Now that you are able to gather the desired information from guests, it is time to prepare the general structure of your advertising:

- Specify which pages will show advertising.

- Specify which the stages of the registration and login process will deliver advertisements.

- Specify where on the pages advertising will be shown.

Again, the instructions in this section make reference to the ACME shopping centers example given in section 2.

Let us assume that ACME gives retailers the opportunity to purchase one of two different advertising packages:

- Platinum Package

- Gold Package

The platinum package is a premium service, and advertisers who have purchased this package will have their advertisements delivered more often than those in the gold package (by a ratio of 2 to 1). Our example retailers have purchased the following packages:

- Catwalk Fashion – Gold Package

- Guerrilla Sport – Platinum Package

- Gold Wire Audio – Gold Package

The following sections will show you how to create the **promotions** and a **campaign** that will provide this behavior: that platinum package advertisements will have twice the exposure of gold package advertisements.

You will also be shown how to enable the built-in advertising **spaces** into which advertisements will be placed.

3.3.1   Decide on Labels for Your Advertisements

This example deployment will use *labelled content* promotions to provide advertising from the various retailers. This will make it easy for you to correctly place advertisements in either the *gold package promotion* or the *platinum package promotion*. To achieve this we will need a *label* for each retailer.

Furthermore, we will be using **intelligent delivery** to prioritize advertisements based on a user's personal information. To achieve this we will need to also to label a retailer's advertising materials according to the priority demographics of the retailer.

In this example, therefore, we will use the following labels (see Table 6) for the advertising materials from our retailers.

NOTE   You should see that the labels listed correspond to the *resultant user labels* made available earlier by the guest manager *custom fields* (§3.2, Table 5).

Table 6: Retailer Advertising Material Labels

Retailer	Advertising Material Labels
Catwalk Fashion	Catwalk Fashion gender Female age_group 0 to 19 age_group 20 to 29 interests Fashion Yes
Guerrilla Sport	Guerrilla Sport gender Female gender Male age_group 20 to 29 age_group 30 to 39 interests Sport Yes
Gold Wire Audio	Gold Wire Audio gender Male age_group 30 to 39 age_group 40 to 49 interests Music Yes interests Technology Yes

3.3.2   Create the Gold Package Promotion

In this step, we will create a *labelled content promotion* that includes all of the advertising materials of the retailers who have purchased the *gold* advertising package; namely, *Catwalk Fashion* and *Gold Wire Audio*.

To create the *gold package* promotion:

1. Navigate to the promotions list (Advertising Services » Promotions).

2. Click the 🔊 **Create new advertising promotion** located above the promotions list; the promotion editor will be shown.

Apply the following settings to the **General Properties** section:

3. Enter the **Name** for the promotion: *Gold Package Promotion*

4. Ensure that the **Enabled** field checkbox, *Use this promotion*, is **ticked**.

5. Leave the **Start Date** field empty.

6. Leave the **End Date** field empty.

7. Enter the following text into the **Description** field:
    This is the Gold Package promotion. It includes all of the advertising materials from the retailers who are currently subscribed to the Gold Advertising Package Service.

8. Leave the **Labels** field empty.

9. Select the **Type** dropdown and choose: *Labelled content*

Apply the following settings to the **Labelled Content** section:

10. Select the **Content Type** dropdown and choose: *Materials only*

11. Select the **Inclusion Mode** dropdown and choose: *At least one of the 'inclusive labels' must match*

12. Enter the following text into the **Inclusive Labels** field: *Catwalk Fashion, Gold Wire Audio*

13. Select the **Exclusion Mode** dropdown and choose: *At least one of the 'exclusive labels' must match*

14. Leave the **Exclusive Labels** field empty.

Apply the following settings to the **Intelligence** section:

15. Ensure that the **Enabled** field checkbox, *Enable intelligent delivery*, is **not** ticked.

And finally:

16. Review your settings and ensure they are as directed.

17. Click the 📢 **Create** button; the promotion will be created and you will be directed back to the promotions list.

3.3.3   Create the Platinum Package Promotion

In this step, we will create a *labelled content promotion* that includes all of the advertising materials of the retailers who have purchased the *platinum* advertising package; namely, *Guerrilla Sport*.

As this promotion is very similar to that of the *Gold Package Promotion*, we will simply modify a *copy* of that promotion.

To create the *platinum package* promotion from a copy of the *gold package* promotion:

1. Navigate to the promotions list (Advertising Services » Promotions).

2. Click on the row containing the *Gold Package Promotion*; an *action row* will be shown containing a list of action links that you may click.

3. Click the **Copy** action link; the promotion editor will be shown with a new promotion that is the same as the *Gold Package Promotion*.

Apply the following changes to the **General Properties** section:

4. Enter the **Name** for the promotion: *Platinum Package Promotion*

5. Enter the following text into the **Description** field:
   This is the Platinum Package promotion. It includes all of the advertising materials from the retailers who are currently subscribed to the Platinum Advertising Package Service.

Apply the following changes to the **Labelled Content** section:

6. Enter the following text into the **Inclusive Labels** field: *Guerrilla Sport*

And finally:

7. Review your settings and ensure they are as directed.

8. Click the 🌱 **Create** button; the promotion will be created and you will be directed back to the promotions list.

3.3.4   Create the Top-Level Promotion

In this step we will create a *weighted content* promotion that includes the gold package and platinum package promotions, providing a 2-to-1 delivery ratio in favor of the platinum package promotion.

Furthermore, we will enable the intelligent delivery of advertising using the **gender**, **age_group** and **interests** user labels, which have been made available due to the custom fields we created earlier (§3.2).

To create the top-level promotion:

1. Navigate to the promotions list (Advertising Services » Promotions).

2. Click the 📢 **Create new advertising promotion** located above the promotions list; the promotion editor will be shown.

Apply the following settings to the **General Properties** section:

3. Enter the **Name** for the promotion: *Top-Level Promotion*

4. Ensure that the **Enabled** field checkbox, *Use this promotion*, is **ticked**.

5. Leave the **Start Date** field empty.

6. Leave the **End Date** field empty.

7. Enter the following text into the **Description** field:
   This is the Top-Level promotion. It includes the gold and platinum package promotions, providing a 2-to-1 delivery ratio in favor of the platinum package promotion.

8. Leave the **Labels** field empty.

9. Select the **Type** dropdown and choose: *Weighted content*

Apply the following settings to the **Weighted Content** section:

10. In the **Content Items** list, click the 🔖 **Add a promotion** link; a row will be added where the **Content** column dropdown is set to *None* and the **Weighting** column text field is set to *1.0*.

11. Select the **Content** column dropdown and choose the *Platinum Package Promotion* option.

12. Enter the following text into the **Weighting** column field: *2.0*

13. Click on the row at either end or between the dropdown and text fields; an *action row* will be shown containing a list of action links that you may click.

14. Click on the ⬇ **Insert After** action link; a new row will be added where the **Content** column dropdown is set to *None* and the **Weighting** column text field is set to *1.0*.

15. Select the new **Content** column dropdown and choose the *Gold Package Promotion* option.

16. Leave the new **Weighting** column text field as: *1.0*.

Apply the following settings to the **Intelligence** section:

17. Change the state of the **Enabled** field checkbox, *Enable intelligent delivery*, to be **ticked**.

18. Use the **gender** demographic information for intelligent delivery:

    a. In the **Requirement Levels** list, click the ➕ **Add a label** link; a row will be added where the **Labels** column dropdown is set to *Select a label group* and the **Requirement Level** column dropdown is set to *100% (Always)*.

    b. Select the **Labels** column dropdown and choose the *gender — Gender* option.

c. Select the **Requirement Level** column dropdown and choose the *50% (Often)* option.

19. Use the **age_group** demographic information for intelligent delivery:

   a. In the **Requirement Levels** list, click on a row at either end or between the dropdowns; an *action row* will be shown containing a list of action links that you may click.

   b. Click on the ➡ **Insert After** action link; a new row will be added where the **Labels** column dropdown is set to *Select a label group* and the **Requirement Level** column dropdown is set to *100% (Always)*.

   c. Select the **Labels** column dropdown and choose the *age_group — Age Group* option.

   d. Select the **Requirement Level** column dropdown and choose the *25% (Sometimes)* option.

20. Use the **interests** demographic information for intelligent delivery:

   a. In the **Requirement Levels** list, click on a row at either end or between the dropdowns; an *action row* will be shown containing a list of action links that you may click.

   b. Click on the ➡ **Insert After** action link; a new row will be added where the **Labels** column dropdown is set to *Select a label group* and the **Requirement Level** column dropdown is set to *100% (Always)*.

   c. Select the **Labels** column dropdown and choose the *interests — Interests* option.

   d. Select the **Requirement Level** column dropdown and choose the *25% (Sometimes)* option.

21. Select the **Default Level** dropdown and choose the *0% (Ignore)* option.

And finally:

* required field

22. Review your settings and ensure they are as directed.

23. Click the 📣 **Create and Reload** button; the promotion will be created and the promotion editor will be reloaded.

24. In the **Selected Content** field, click the ⬇ **show selected items** link to expand the list of promotions and materials that are included in this promotion.

25. Verify that the *Platinum Package Promotion* is included.

26. Verify that the *Gold Package Promotion* is included.

3.3.5   Create the Default Campaign

In this step we will create a default campaign that will provide the advertisements from our top-level promotion (and therefore, from our gold and platinum package promotions).

✔ **BEST PRACTICE**

If you are going to use multiple campaigns (**full edition** only), configure one of your campaigns to act a *default campaign* by removing all start and end date restrictions and specifying a low rank (typically 20).

The *default campaign* will then be able to *fill in the gaps* when no other campaigns are active or are unable to provide enough advertisements.

To create the default campaign:

1. Navigate to the campaigns list (Advertising Services » Campaigns).

2. Click the **Create new advertising campaign** located above the campaigns list; the campaign editor will be shown.

Apply the following settings to the **General Properties** section:

3. Enter the **Name** for the promotion: *Default Campaign*

4. Ensure that the **Enabled** field checkbox, *Use this campaign*, is **ticked**.

5. Leave the **Start Date** field empty.

6. Leave the **End Date** field empty.

7. Enter a low **Rank** for the campaign: *20*

8. Leave the **Weight** at its default value: *1.0*

9. Enter the following text into the **Description** field:
   This is the default campaign. It is always enabled, but has a rank of 20 to allow higher-ranking campaigns to take precedence.

Apply the following settings to the **Web Promotions Delivery** section:

10. Select the **With login** dropdown and choose the *Top-Level Promotion* option.

11. Select the **With registration** dropdown and choose the *Top-Level Promotion* option.

12. Select the **With receipt** dropdown and choose the *Top-Level Promotion* option.

13. Select the **With self-service** dropdown and choose the *Top-Level Promotion* option.

14. Select the **After login** dropdown and choose the *Top-Level Promotion* option.

Apply the following settings to the **SMS Promotions Delivery** section:

15. Select the **With receipt** dropdown and choose the *Top-Level Promotion* option.

And finally:

16. Review your settings and ensure they are as directed.

17. Click the ![icon] **Create** button; the campaign will be created and you will be directed back to the campaigns list.

3.3.6   Enable the Built-in Spaces

By default, the Advertising Services plugin will install a number of *built-in* advertising spaces. These *built-in* spaces, however, are initially disabled.

You will have to enable some of these advertising spaces before you will be able to see any advertisements. For our example deployment, we will enable the following spaces:

- **Page Top (built-in)** – this space will be used to show wide banner image advertisements across the top of a page.

- **Page Right (built-in)** – this space will be used to show a mix of image and text advertisements.

- **Page Interstitial (built-in)** – this space will be used to show an *interstitial* video advertisement.

- **Mobile Page Top (built-in)** – this space will be used to show, on small screen devices, an image advertisement across the top of the page.

- **Mobile Page Bottom (built-in)** – this space will be used to show, on small screen devices, a number of text advertisements at the bottom of a page.

- **Mobile Page Interstitial (built-in)** – this space will be used to show, on small screen devices, an *interstitial* video advertisement.

- **SMS Bottom (built-in)** – this space will be used to deliver an SMS advertisement with a guest registration receipt.
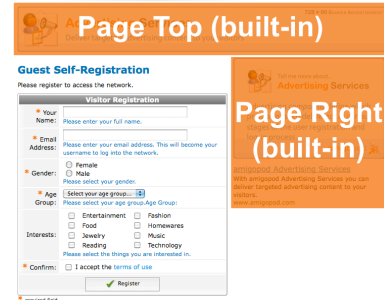
To enable these advertising spaces:

1. Navigate to the advertising spaces list (Advertising Services » Spaces).

2. Click on the **Mobile Page Bottom (built-in)** space; an *action row* will be shown containing a number of action links that you can click.

3. Click the ✔ **Enable** link; the space will be enabled immediately, without confirmation.

4. Repeat steps 2 & 3 for each of the following built-in advertising spaces:

    a. Mobile Page Interstitial (built-in)

    b. Mobile Page Top (built-in)

    c. Page Interstitial (built-in)

    d. Page Right (built-in)

    e. Page Top (built-in)

    f. SMS Bottom (built-in)

3.4   Uploading and defining advertisements

With your promotions and campaign defined, you can now define your advertising materials and upload any related images and Flash files.

NOTE   It is important to remember that for images, videos and Flash animations to be delivered, they will need to fit within the size constraints defined by the advertising spaces (§3.3.6, §4.2.2.2).

To ensure that advertisements will be delivered to the desired spaces, it is recommended that you ensure that advertisements conform to select sizes.

✔ **BEST PRACTICE**
Define a small number of allowed sizes for your advertisements and ensure that your advertisements adhere to them.

NOTE   You should also keep in mind that mobile devices often have much smaller screens than desktop and laptop machines.

Consequently, you should ensure that your *small* images (those typically shown down the right side of a page) are sized appropriately for a mobile device. This will ensure that you get the most use possible from your advertisements.

✔ **BEST PRACTICE**
Require a fixed width of no more than 300 pixels for sidebar advertisements. This ensures that advertisements can be delivered to the *Page Right (built-in)* space (§3.3.6) for large-screen devices and to the *Mobile Page Top (built-in)* and *Mobile Page Bottom (built-in)* space for mobile devices (small-screen devices).

The advertising materials that will be created in the following sections are based on the fictional *Catwalk Fashion* retailer described in the advertising services deployment example (§2), and as such, they are provided only as examples. You may follow these instructions if you wish, or you can simply read them to gain a greater understanding of the system.

NOTE   Refer to section 4.5.2 below for further details regarding advertising materials.

3.4.1   Create an image advertisement

In this example we will create an image advertisement for our fictional *Catwalk Fashion* retailer. The advertising material will be labelled with the *advertising materials labels* that we decided upon earlier (§3.3.1). These labels will ensure that:

1. The material is included in the appropriate promotion for the *Catwalk Fashion* retailer, in this case the *Gold Promotion* (§3.3.2).

2. The material is prioritized for delivery to the priority demographic groups selected by the *Catwalk Fashion* retailer (§2, Table 3).

The width of the image we will upload will be 300 pixels wide to ensure that it can be delivered to both large screen devices and small screen devices (mobile devices like the iPhone).

The advertisement will also be linked to the *sales* section of the *Catwalk Fashion* website.

✔ **BEST PRACTICE**
Require a fixed width of no more than 300 pixels for sidebar advertisements. This ensures that advertisements can be delivered to the *Page Right (built-in)* space (§3.3.6) for large-screen devices and to the *Mobile Page Top (built-in)* and *Mobile Page Bottom (built-in)* space for mobile devices (small-screen devices).

NOTE   Refer to section 4.5.2 below for further details regarding advertising materials.

NOTE   This example assumes that you have an image to upload that is 300 pixels wide and 100 pixels high.

To create an image advertisement:

1. Navigate to the advertising materials list (Advertising Services » Materials).

2. Click the 🟢 **Create new advertising material** link; the material editor will be shown.

Apply the following settings to the **General Properties** section:

3. Enter the **Name** for the material: *Catwalk Fashion – 20% Off Sale – Image (300x100)*

4. Ensure that the **Enabled** field checkbox, *Use this material*, is **ticked**.

5. Leave the **Start Date** field empty.

6. Leave the **End Date** field empty.

7. Enter the following text into the **Description** field:
   This is an example image advertisement for Catwalk Fashion.

8. Enter the following text into the **Labels** field:
   Catwalk Fashion,
   gender Female,
   age_group 0 to 19,
   age_group 20 to 29,
   interests Fashion Yes

9. Select the **Type** dropdown and choose the *Web browser content* option.

Apply the following settings to the **Web Content** section:

10. Select the **Format** dropdown and choose the *Image advertisement* option.

11. Enter a **Hyperlink** of: *http://www.catwalkfashion.com/sales/*

12. Select the **Image** dropdown and choose the *Upload a new image* option.

13. In the **New Image** field, click the **Browse** button and then choose the image you wish to upload.

14. Enter a **Title** of: *20% Off Sale – Now on at Catwalk Fashion*

And finally:

15. Review your settings and ensure they are as directed.

16. Click the ✚ **Create and Reload** button; the material will be created and the material editor reloaded.

17. Verify that the **Preview** field (located at the bottom of the material editor form) shows the desired image.

3.4.2   Create a web text advertisement

In this example we will create a web text advertisement for our fictional *Catwalk Fashion* retailer. The advertising material will be labelled with the

advertising materials labels that we decided upon earlier (§3.3.1). These labels will ensure that:

1. The material is included in the appropriate promotion for the *Catwalk Fashion* retailer, in this case the *Gold Promotion* (§3.3.2).

2. The material is prioritized for delivery to the priority demographic groups selected by the *Catwalk Fashion* retailer (§2, Table 3).

The advertisement will also be linked to the *sales* section of the *Catwalk Fashion* website.

NOTE   Refer to section 4.5.2 below for further details regarding advertising materials.

To create a text advertisement:

1. Navigate to the advertising materials list (Advertising Services » Materials).

2. Click the ⊕ **Create new advertising material** link; the material editor will be shown.

Apply the following settings to the **General Properties** section:

3. Enter the **Name** for the material: *Catwalk Fashion – 20% Off Sale – Text*

4. Ensure that the **Enabled** field checkbox, *Use this material*, is **ticked**.

5. Leave the **Start Date** field empty.

6. Leave the **End Date** field empty.

7. Enter the following text into the **Description** field:
   This is an example text advertisement for Catwalk Fashion.

8. Enter the following text into the **Labels** field:
   Catwalk Fashion,
   gender Female,
   age_group 0 to 19,
   age_group 20 to 29,
   interests Fashion Yes

9. Select the **Type** dropdown and choose the *Web browser content* option.

Apply the following settings to the **Web Content** section:

10. Select the **Format** dropdown and choose the *Text advertisement* option.

11. Enter a **Hyperlink** of: *http://www.catwalkfashion.com/sales/*

12. Enter a **Title** of: *20% Off Sale – Catwalk Fashion*

13. Enter the following text into the **Body** field:
    Walk into Catwalk Fashion for 20% off all items in the store. Hurry, sale ends soon!

14. Enter a **Footer** of: *catwalkfashion.com/sales*

15. Verify that the **Preview** field shows the desired advertisement.

And finally:
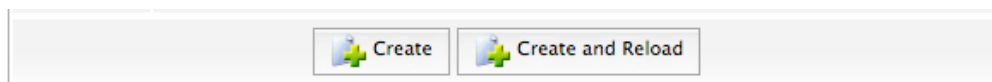
* required field

16. Review your settings and ensure they are as directed.

17. Click the **Create** button; the material will be created and you will be directed back to the materials list.

3.4.3   Create a YouTube video advertisement

In this example we will define a YouTube video advertisement for our fictional *Catwalk Fashion* retailer. The advertising material will be labelled with the *advertising materials labels* that we decided upon earlier (§3.3.1). These labels will ensure that:

1. The material is included in the appropriate promotion for the *Catwalk Fashion* retailer, in this case the *Gold Promotion* (§3.3.2).

2. The material is prioritized for delivery to the priority demographic groups selected by the *Catwalk Fashion* retailer (§2, Table 3).

We will first create a *large screen* version of the material, and then modify a copy of that to create a *small screen* version for mobiles devices (such as the iPhone).

NOTE   Refer to section 4.5.2 below for further details regarding advertising materials.

To create a text advertisement:

1. Navigate to the advertising materials list (Advertising Services » Materials).

2. Click the **Create new advertising material** link; the material editor will be shown.

Apply the following settings to the **General Properties** section:

3. Enter the **Name** for the material: *Catwalk Fashion – 20% Off Sale – Video (Large)*

4. Ensure that the **Enabled** field checkbox, *Use this material*, is **ticked**.

5. Leave the **Start Date** field empty.

6. Leave the **End Date** field empty.

7. Enter the following text into the **Description** field:
    This is an example YouTube video advertisement for Catwalk Fashion.

8. Enter the following text into the **Labels** field:
    Catwalk Fashion,
    gender Female,
    age_group 0 to 19,
    age_group 20 to 29,
    interests Fashion Yes

9. Select the **Type** dropdown and choose the *Web browser content* option.

Apply the following settings to the **Web Content** section:

10. Select the **Format** dropdown and choose the *YouTube video advertisement* option.

11. Enter a **Video ID** of: *Y7dpJ0oseIA*

12. Enter a **Width** of: *480*

13. Enter a **Height** of: *385*

14. Verify that the **Preview** field shows the desired advertisement.

And finally:

15. Review your settings and ensure they are as directed.

16. Click the 🌼 **Create** button; the material will be created and you will be directed back to the materials list.

NOTE   A video this large will be too big for mobile devices, so copy it and make a smaller version.

> ✔ **BEST PRACTICE**
>
> Define both a large screen version and a small screen version of a YouTube video advertisement. Ensure the width of the small screen version is no wider than 300 pixels.

To create a *small screen* version of the YouTube video advertisement:

1. Navigate to the advertising materials list (Advertising Services » Materials).

2. Click on the row for the *Catwalk Fashion – 20% Off Sale – Video (Large)* material; an *action row* will be shown containing a number of action links that you can click.

3. Click on the 📋 **Copy** action link; the material editor will be shown for a new material with the settings copied from the selected material.

Apply the following settings to the **General Properties** section:

4. Enter the **Name** for the material: *Catwalk Fashion – 20% Off Sale – Video (Small)*

Apply the following settings to the **Web Content** section:

5. Change the **Width** to: *300*

6. Change the **Height** to: *240*

And finally:

7. Review your settings and ensure they are as directed.

8. Click the 🧩 **Create** button; the material will be created and you will be directed back to the materials list.

3.4.4   Create a SMS text advertisement

In this example we will create a SMS text advertisement for our fictional *Catwalk Fashion* retailer. The advertising material will be labelled with the *advertising materials labels* that we decided upon earlier (§3.3.1). These labels will ensure that:

1. The material is included in the appropriate promotion for the *Catwalk Fashion* retailer, in this case the *Gold Promotion* (§3.3.2).

2. The material is prioritized for delivery to the priority demographic groups selected by the *Catwalk Fashion* retailer (§2, Table 3).

Because the SMS advertisement is placed after the text of a registration receipt, it will have to be kept quite short.

> ✔ **BEST PRACTICE**
>
> Keep SMS messages short to ensure that they will fit within the remainder of an SMS registration receipt.
>
> The mobile carrier will typically limit the **total** length of an SMS to 160 characters (but perhaps as little as 128 with some carriers).

NOTE   Refer to section 4.5.2 below for further details about advertising materials.

To create a SMS text advertisement:

Material Name	Start Date	End Date
Catwalk Fashion – 20% Off Sale – Image (300x100) This is an example image advertisement for Catwalk Fashion.		
Catwalk Fashion – 20% Off Sale – Text This is an example text advertisement for Catwalk Fashion.		
Catwalk Fashion – 20% Off Sale – Video (Large) This is an example YouTube video advertisement for Catwalk Fashion.		
Catwalk Fashion – 20% Off Sale – Video (Small) This is an example YouTube video advertisement for Catwalk Fashion.		

1. Navigate to the advertising materials list (Advertising Services » Materials).

2. Click the **Create new advertising material** link; the material editor will be shown.

Apply the following settings to the **General Properties** section:

3. Enter the **Name** for the material: *Catwalk Fashion – 20% Off Sale – SMS*

4. Ensure that the **Enabled** field checkbox, *Use this material*, is **ticked**.

5. Leave the **Start Date** field empty.

6. Leave the **End Date** field empty.

7. Enter the following text into the **Description** field:
   This is an example SMS advertisement for Catwalk Fashion.

8. Enter the following text into the **Labels** field:
   Catwalk Fashion,
   gender Female,
   age_group 0 to 19,
   age_group 20 to 29,
   interests Fashion Yes

9. Select the **Type** dropdown and choose the *SMS content* option.

Apply the following settings to the **SMS Content** section:

10. Enter the following text into the **Text** field:
    Catwalk Fashion. 20% off. Sale ends soon!

And finally:

11. Review your settings and ensure they are as directed.

12. Click the 🟢 **Create** button; the material will be created and you will be directed back to the materials list.

3.4.5   Verify delivery of your advertisements

Now that you have uploaded your advertising materials, it is a good time to verify that they are being delivered to the guest facing pages, such as the guest self-registration page.

To verify that advertisements are being delivered:

1. Navigate to the pages list (Advertising Services » Pages).

2. Select the *Guest Self-Registration* page from the list; an *action row* will be shown.

3. Click the 🟤 **Launch** link; a new browser window or browser tab will be opened showing the desired page.

4. Verify that advertisements have been delivered to the correct locations.

If you fail to see any advertisements, ensure that advertising has been enabled for the page you selected (§4.1) and that you have enabled your spaces (§3.3.6). Also ensure that your advertisements will fit within the spaces (§4.2.2.2).

Finally, ensure that you don't have any date range constraints that would exclude delivery of your materials, promotions or campaigns, and that your

campaign includes the correct promotions which in turn include the correct materials.

NOTE   Refer to the advertising services reference section (§4) for more details regarding configuration.

3.5   Fine-tuning delivery

At this stage in your deployment you have everything necessary for delivering advertisements to the users of your system; you can even prioritize the delivery using the **intelligent delivery** functionality provided by the promotions (**full edition** only).

There are however, a number of fine-tunings that you may wish to make to the amigopod to improve the user experience in subtle but effective ways:

1. You could use separate advertising spaces for images and text. The regularity of having all images placed above all text advertisements can reduce the sense of clutter.

2. You can reduce overloading the user with videos by only showing them at very specific times, such as only before login. Too many videos that the user must watch, or must explicitly skip, can cause the user to become frustrated and dissatisfied with the service – even if it is free.

The following sections will show you how to achieve these goals.

3.5.1   Separating image & Flash advertisements from text advertisements

IMPORTANT   You need the **full edition** of Advertising Services to be able to create custom advertising spaces.

A simple but effective way to improve the user experience is to create separate advertising spaces for graphical advertisements (images and Flash animations) and textual advertisements.

To effectively split the *Page Right (built-in)* space into two separate spaces, one for graphics and one for text:

1. Navigate to the advertising spaces list (Advertising Services » Spaces).

2. Select the *Page Right (built-in)* space from the list; an *action row* will be shown.

3. Click the **Copy** link; the space editor will be shown.

Change the following settings in the **General Properties** section:

4. Enter a **Name** of: *Page Right (Text Only)*

5. Enter a **Rank** of: *20*

Change the following settings in the **Promotional Material Constraints** section:

6. In the **Allowed Material** checklist, click the **Clear selection** link; all materials types will **not** be ticked.

7. In the **Allowed Material** checklist, click the *Text advertisement [web]* checkbox, so that it is **ticked**.

And then:

8. Review your settings and ensure they are as directed.

9. Click the **Create** button; you will be directed back to the advertising spaces list.

At this stage you should now have two advertising spaces configured to deliver advertisements into the *Page Right* location. The *Page Right (built-in)* space however, is still configured to deliver both images and text.

We now only need to remove text advertising materials from the built-in space:

10. Navigate to the advertising spaces list (Advertising Services » Spaces).

11. Select the *Page Right (built-in)* space from the list; an *action row* will be shown.

12. Click the **Edit** link; the space editor will be shown.

Change the following settings in the **Promotional Material Constraints** section:

13. In the **Allowed Material** checklist, click the *Text advertisement [web]* checkbox, so that it is **not** ticked.

And finally:

14. Review your settings and ensure they are as directed.

15. Click the **Save Changes** button; you will be directed back to the advertising spaces list.

If you open one the guest facing pages (§3.4.5), you should see that graphical advertisements are placed above text advertisements.

NOTE   You can also adjust the mix of graphical materials to text materials by changing the maximum number of rows in each of the spaces.

3.5.2   Showing interstitial videos before login only

IMPORTANT   You need the **full edition** of Advertising Services to be able to control the advertising spaces shown on a given page.

A first time user of your network will need to register, receive their registration receipt and login. If they are forced to watch a video at each and every step,

the process can become tedious and frustrating, and can result in dissatisfaction with the service.

By limiting the delivery of video advertisements to just one or two key stages of the process, you can significantly improve the user's experience and their positive perception of the service. Even if the service is free, this is still an important consideration to make.

In the example given here, you will disable the delivery of video on all guest self-registration pages except login.

You can repeat this process for any other page groups (§4.1) that you may have.

To disable video on all of the default **Guest Self-Registration** pages:

1. Navigate to the advertising pages list (Advertising Services » Pages).

2. Select the *Guest Self-Registration* page from the list; an *action row* will be shown.

3. Click the Edit link; the space editor will be shown.

Change the following settings in the **Space Options** section:

4. Select the **Denied Spaces Policy** dropdown and choose the *Deny advertising in…* option.

5. In the **Denied Spaces** list, click the Add a denied space link; a row will be added to the list containing a dropdown.

6. Select the new dropdown and choose the *Page Interstitial (built-in)* option.

7. In the **Denied Spaces** list, click on the row, but not on the dropdown; an *action row* will be shown.

8. Click the Insert After action link; a new row will be inserted with a new dropdown.

9. Select the new dropdown and choose the *Mobile Page Interstitial (built-in)* option.

And then:

10. Review your settings and ensure they are as directed.

11. Click the Save and Reload button; your changes will be saved and the page editor form reloaded.

At this stage the *interstitial* advertising spaces used to deliver video have been denied for *all* of the pages in the *Guest Self-Registration* page group.

Now you need to override this top-level setting for just the pages that you *do* want video to be delivered to, which for our example is the login page:

12. In the **Child Pages** field:

    a. Click the ⬇ **Show children** link; a list of child pages will be expanded.

    b. Locate, but do not click, the link titled 👤 **Guest Self-Registration (Login Page)**.

    c. Click the associated 🖼 **Page advertising settings** link; the page editor for editing the login page advertising overrides will be shown.

In the editor for the login child-page, apply the following settings to the **Space Options** section:

13. Select the **Allowed Spaces Policy** dropdown and choose the *Use parent spaces, but also allow advertising in…* option.

14. In the **Allowed Spaces** list, click the 📑 **Add an allowed space** link; a row will be added to the list containing a dropdown.

15. Select the new dropdown and choose the *Page Interstitial (built-in)* option.

16. In the **Allowed Spaces** list, click on the row, but not on the dropdown; an *action row* will be shown.

17. Click the 📤 **Insert After** action link; a new row will be inserted with a new dropdown.

18. Select the new dropdown and choose the *Mobile Page Interstitial (built-in)* option.

And finally:

19. Review your settings and ensure they are as directed.

20. Click the 💾 **Save Changes** button; you will be directed back to the advertising pages list.

If you navigate to each of the different guest self-registration pages, you should now be shown a video (assuming that you have a valid video advertisement) only when you navigate to the guest login page. Video advertisements should no longer be delivered on the registration or receipt pages.

4   Advertising Services Reference

The amigopod Advertising Services plugin enables you to deliver marketing promotions and advertisements to users of your system.

This is achieved through the configuration of a number of key components provided by the Advertising Services plugin:

- Pages
- Spaces
- Campaigns
- Promotions
- Materials

Your **materials** are the actual advertisements that are delivered. They can be web advertisements (such as images, FLASH animations, or text) or they can be SMS advertisements. You can group your materials into **promotions** and apply some rules regarding how to deliver them.

Materials and promotions can then be organized into advertising **campaigns** that run over a specified date range and with a specified priority (rank and weight).

The Advertising Services plugin will deliver your promotional materials in advertising **spaces** using some simple matching criteria (e.g. type of advertisement, size). These spaces are then placed on the various **pages** that a user will see (e.g. guest login or registration, or guest SMS receipts).

Finally, you can specify for each **page** (or group of pages), which campaigns and spaces can be presented (**full edition** only).

The Advertising Services plugin also provides simplified **reporting** with which you can analyze various metrics of your system, access the data that it gathers, and look at those metrics and data with reference to various user groups (demographics).

The following sections describe the configuration of pages, spaces, campaigns, promotions, materials and reports.

4.1   Pages

There are a number of pages provided by the amigopod in which advertising materials may be delivered. These include specific Guest Manager pages (e.g. registration receipts), RADIUS web logins and Guest Self-Registration pages.

The page settings provided by advertising services allow you to control:

1. Whether or not advertising can be delivered on a page

2. Which advertising spaces will be used for a page (**full edition** only)

3. Which advertising campaigns will provide ads for a page (**full edition** only)

Settings can be applied to a group of related pages or overridden for a single specific page.

4.1.1   Page List

The pages list (Advertising Services » Pages) provides a list of the current page groups provided by the system that support advertising. Pages are not created or deleted via Advertising Services; they are only configured with regards to the delivery of advertising.

4.1.1.1   Page list entries

Each of the items in the page list represents a group of related pages. For example, a **Guest Self-Registration** item represents the pages that comprise a guest self-registration instance: guest registration & receipt, guest self-service portal login & password reset, guest login & login message.

Select an item to access the operations available for each page group, which are:

- **Edit** – edit the advertising settings for a page group and for specific pages in the group.

- **Go To** – edit the settings for the page (e.g. edit the guest-self registration settings).

- **Launch** – launch the main page of the group to see what advertising is delivered.

4.1.1.2   Editing the advertising settings for a page

To edit the advertising settings for a page:

1. Select the relevant page from the list; an *action row* will be shown.

2. Click the **Edit** link; the page editor for the group will be shown.

3. Edit the visible settings to apply the desired policy to all pages in the group.

4. Click the **Child Pages** link; a list of the pages that are part of this group will be shown.

5. Click the **Page advertising settings** link for the desired child page; the page editor for the child page will be shown.

4.1.1.3   Viewing a page that supports advertising

To view the *main* page of a group of pages:

1. Select the relevant page from the list; an *action row* will be shown.

2. Click the 👤 **Launch** link; a new browser window or browser tab will be opened showing the desired page.

To view a specific *child* page from a group of pages:

1. Select the relevant page group from the list; an *action row* will be shown.

2. Click the 📝 **Edit** link; the page editor for the group will be shown.

3. Click the ⬇ **Child Pages** link; a list of the pages that are part of this group will be shown.

4. Click the ➤ **Page advertising settings** link for the desired child page; the page editor for the child page will be shown.

5. Click the 👤 **Launch** link; a new browser window or browser tab will be opened showing the desired page.

4.1.2   Page Editor

The page editor allows you to configure whether or not advertising will be delivered on a given page or group of related pages, and if so, which advertising spaces and advertising campaigns will be used when presenting the page.

4.1.2.1   General Settings

A page group is organized as a hierarchy. At the top of the hierarchy is the page group itself. The page group then contains a number of child pages.

Advertising settings can be applied to both the page group (i.e. at the top of the hierarchy) and to the child pages. Settings applied to the page group are also applied to each child page. These *inherited* settings can be overridden in each child page.

This organization allows you to apply common advertising settings at the page group level, with special overrides applied to the child pages only as necessary.

For example, the page hierarchy for the default **Guest Self-Registration** page group is:

- Guest Self-Registration – this is the page group.

   o Guest Self-Registration (Registration Page) – the child page for the registration page.

   o Guest Self-Registration (Receipt Page) – the child page for the guest self-registration receipt.

       ○ Guest Self-Registration (Receipt Download) – the child page for a downloaded receipt.

       ○ Guest Self-Registration (Receipt E-mail) – the child page for an email receipt.

       ○ Guest Self-Registration (Login Page) – the child page for the guest self-registration's login page.

       ○ Guest Self-Registration (Login Message) – the child page for the guest self-registration's login message (acknowledgement) page.

       ○ Guest Self-Registration (Receipt SMS) – the child page for the SMS receipt.

       ○ Guest Self-Registration (Self-Service Portal) – the child page for the self-service portal pages.

The **General Settings** section provides the following user interface controls:

Page: Quick links to the editor and the user-facing web page that these settings are for.

Page:	Guest Self-Registration Launch page
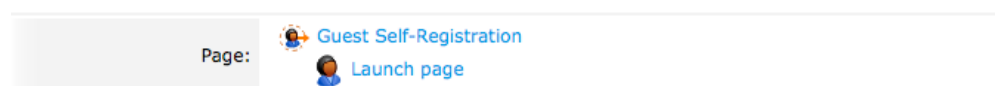
Parent Page: A quick link to the page group to which a child page belongs.

Parent Page:	Guest Self-Registration Launch page Page advertising settings
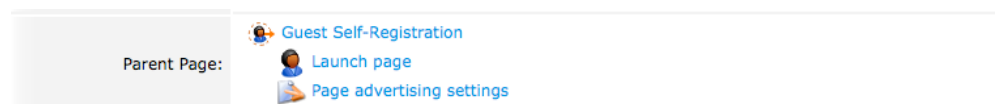
The **Parent Page** quick links will only be present when editing the settings of a *child page*.

Child Pages: A collapsible list of *child pages* for the current page group.

Child Pages:	⬇ Show children (8 in total)

Child Pages:	The following pages are children of this page. ⬆ Hide children (8 in total) Guest Self-Registration (Registration Page) Page advertising settings Guest Self-Registration (Receipt Page) Page advertising settings Guest Self-Registration (Receipt Download) Page advertising settings Guest Self-Registration (Receipt E-mail) Page advertising settings Guest Self-Registration (Login Page) Page advertising settings Guest Self-Registration (Login Message) Page advertising settings Guest Self-Registration (Receipt SMS) Page advertising settings Guest Self-Registration (Self-Service Portal) Page advertising settings

The **Child Pages** quick links will only be present when editing a parent page (page group). To expand the list of child pages, click the ⬇ **Show children** link. To collapse the list of child pages, click the ⬆ **Hide children** link.

When expanded, the list of child pages has two links for each child page. Clicking the first link will take you to the editor for the target page. The second link, 🖍 **Page advertising settings**, will take to you the advertising settings for the target page.

Advertising Enabled: Enable or disable the delivery of advertising on this page (or page group).

Advertising Enabled:	Use default setting (Enable advertising on this page) ⬍
	Use default setting (Enable advertising on this page) this page.
	Disable advertising on this page
	Enable advertising on this page

Advertising Enabled:	Use parent setting (Enable advertising on this page) ⬍
	Use parent setting (Enable advertising on this page) this page.
	Disable advertising on this page
	Enable advertising on this page

The **Advertising Enabled** setting provides the following options:

Table 7: Options for the Advertising Enabled field

Option	Description
Use default setting (Enable advertising on this page)	This option is only provided for the page group, not for child pages. Selecting this option will enable advertising on this page, and its children.
Use parent setting	This option is only provided for a child page, not for a page group. This is the default setting for a child page. Choosing this option will ensure that advertising on this child page is only enabled if advertising is enabled for the parent page.
Disable advertising on this page	Disable advertising on this page, and if this is a parent page, disable advertising for all child pages that are configured to: *Use parent setting*.
Enable advertising on this page	Enable advertising on this page, and if this is a parent page, enable advertising for all child pages that are configured to: *Use parent setting*.

Description: Additional notes to associate with these advertising settings.
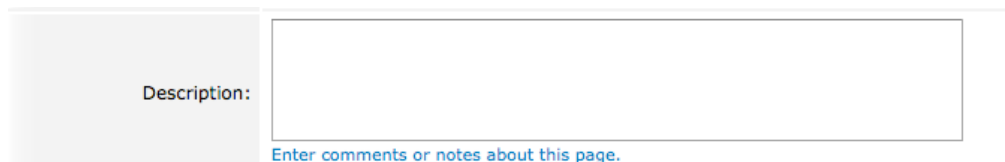
Description:	
	Enter comments or notes about this page.

The **Description** field is provided as a simple place for you to make any notes that may be of relevance for your system.

4.1.2.2   Space Options
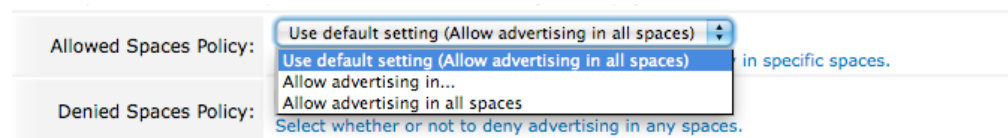
IMPORTANT   The **Space Options** section is only available in the **full edition** of Advertising Services. Ignore this section if you are using the **lite edition**.

The **Space Options** section has a number of fields that allow you to configure which advertising spaces can be shown on a given page.

The final set of advertising spaces used is determined by first applying the **Allowed Spaces Policy**, followed by the **Denied Spaces Policy**.

NOTE   To review the chosen set of advertising spaces, make your selections, click the ![icon] **Save and Reload** button and then expand the **Preview** list.

Allowed Spaces Policy: Select whether to allow advertising in all advertising spaces or only in specific spaces.

NOTE   The **Denied Spaces Policy** is applied after this field, so the final list of spaces used may be less than the spaces allowed here.

The **Allowed Spaces Policy** supports the following options:

Table 8: Options for the Allowed Spaces Policy field

Option	Description
Use default setting (Allow advertising in all spaces)	This option is only provided for the page group, not for child pages. Selecting this option will allow advertising in all (enabled and applicable) advertising spaces.
Allow advertising in...	This option is only provided for the page group, not for child pages. Selecting this option will show the **Allowed Spaces** list with which you can specify the exact list of spaces to allow.
Allow advertising in all spaces	Selecting this option will allow advertising in all (enabled and applicable) advertising spaces.
Use parent spaces	This option is only provided for the child pages, not for the page group. Selecting this option will allow advertising in the list of spaces defined by the parent page's space options, which is the result of applying the **Allowed Spaces Policy** followed by the **Denied Spaces Policy**.

Option	Description
Use parent spaces, but also allow advertising in...	This option is only provided for the child pages, not for the page group. Selecting this option will show the **Allowed Spaces** list with which you can specify *additional* spaces to allow. The *additional* spaces will be added to the list of spaces defined by the parent page's space options, which is the result of applying the **Allowed Spaces Policy** followed by the **Denied Spaces Policy**.

Allowed Spaces: Choose specific spaces to add to the list of spaces to allow.
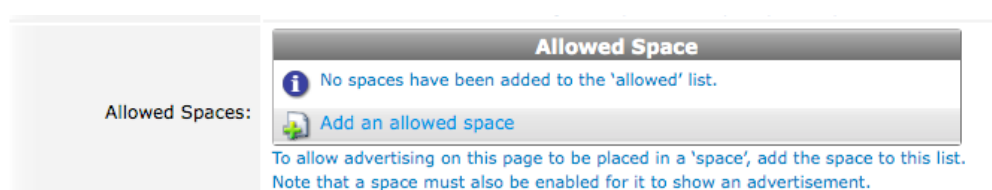
NOTE   This field is shown or hidden based on the option you select for the **Allowed Spaces Policy** field.

Any advertising space listed here will be added to the list of spaces that will be used to deliver advertisements. This field is often used at the page group level to specify only a small set of allowed spaces, and at the child page level to add extra spaces to those that are allowed by a parent page.

To add an allowed space to an empty list, click the **Add an allowed space** link.

If the list already has spaces in it, clicking on a row will show an *action row* with a number of commands that can be executed for that row:

- **Remove** – remove the space from the list of explicitly allowed advertising spaces

- **Move up** – position the row higher in the list

- **Move down** – position the row lower in the list

- **Insert before** – insert a row before this row so that another space can be allowed

- **Insert after** – insert a row after this row so that another space can be allowed

Denied Spaces Policy: Select whether or not to deny advertising in any spaces.

NOTE   The **Denied Spaces Policy** is applied after the **Allowed Spaces Policy** field is processed.

The **Denied Spaces Policy** supports the following options:

Table 9: Options for the Denied Spaces Policy field

Option	Description
No change	Selecting this option does not modify the list of spaces allowed by the **Allowed Spaces Policy**.
Deny advertising in...	Selecting this option will show the **Denied Spaces** list with which you can specify a list of spaces to deny.
Deny advertising in all spaces	Selecting this option will deny advertising in all advertising spaces.

Denied Spaces: Choose specific spaces to *remove* from the list of spaces to use.

NOTE   This field is shown or hidden based on the option you select for the **Denied Spaces Policy** field.

Any advertising space listed here will be not be used to show advertisements on the page. This field is often used to specify an *exception* to an *allow all* specification.

For example, say there are three enabled advertising spaces: *Page Top (built-in)*, *Page Right (built-in)* and *Page Bottom (built-in)*. With the **Allowed Spaces Policy** set to *Allow advertising in all spaces*, all three spaces would be used. If you only wanted *Page Top (built-in)* and *Page Right (built-in)* to be allowed, then set the **Denied Spaces Policy** to *Deny advertising in...* and add *Page Bottom (built-in)* to the **Denied Spaces** list.

To add a denied space to an empty list, click the **Add a denied space** link.

If the list already has spaces in it, clicking on a row will show an *action row* with a number of commands that can be executed for that row:

- **Remove** – remove the space from the list of explicitly denied advertising spaces

- **Move up** – position the row higher in the list

- **Move down** – position the row lower in the list

- **Insert before** – insert a row before this row so that another space can be denied

- **Insert after** – insert a row after this row so that another space can be denied

4.1.2.3   Campaign Options

IMPORTANT   The **Campaign Options** section is only available in the **full edition** of Advertising Services. Ignore this section if you are using the **lite edition**.

The **Campaign Options** section has a number of fields that allow you to configure which advertising campaigns can provide advertisements for a given page.

The final set of advertising campaigns used is determined by first applying the **Allowed Campaigns Policy**, followed by the **Denied Campaigns Policy**.

NOTE   To review the chosen set of advertising campaigns, make your selections, click the **Save and Reload** button and then expand the **Preview** list.

Allowed Campaigns Policy: Select whether to allow advertising from all advertising campaigns or only from specific campaigns.

NOTE   The **Denied Campaigns Policy** is applied after this field, so the final list of campaigns used may be less than the campaigns allowed here.

The **Allowed Campaigns Policy** supports the following options:

Table 10: Options for the Allowed Campaign Policy field

Option	Description
Use default setting (Allow advertising from all campaigns)	This option is only provided for the page group, not for child pages. Selecting this option will allow advertising from all (enabled and applicable) advertising campaigns.
Allow advertising from...	This option is only provided for the page group, not for child pages. Selecting this option will show the **Allowed Campaigns** list with which you can specify the exact list of campaigns to allow.
Allow advertising from all campaigns	Selecting this option will allow advertising from all (enabled and applicable) advertising campaigns.
Use parent campaigns	This option is only provided for the child pages, not for the page group. Selecting this option will allow advertising from the list of campaigns defined by the parent page's campaign options, which is the result of applying the **Allowed Campaigns Policy** followed by the **Denied Campaigns Policy**.
Use parent campaigns, but also allow advertising from...	This option is only provided for the child pages, not for the page group. Selecting this option will show the **Allowed Campaigns** list with which you can specify *additional* campaigns to allow. The *additional* campaigns will be added to the list of campaigns defined by the parent page's campaign options, which is the result of applying the **Allowed Campaigns Policy** followed by the **Denied Campaigns Policy**.

Allowed Campaigns: Choose specific campaigns to add to the list of campaigns to allow.

NOTE   This field is shown or hidden based on the option you select for the **Allowed Campaigns Policy** field.

Any advertising campaign listed here will be added to the list of campaigns that will be used to deliver advertisements. This field is often used at the page group level to specify only a small set of allowed campaigns, and at the child page level to add extra campaigns to those that are allowed by a parent page.

To add an allowed campaign to an empty list, click the **Add an allowed campaign** link.

If the list already has campaigns in it, clicking on a row will show an *action row* with a number of commands that can be executed for that row:

- **Remove** – remove the campaign from the list of explicitly allowed advertising campaigns

- **Move up** – position the row higher in the list

- **Move down** – position the row lower in the list

- **Insert before** – insert a row before this row so that another campaign can be allowed

- **Insert after** – insert a row after this row so that another campaign can be allowed

Denied Campaigns Policy: Select whether or not to deny advertising from any campaigns.
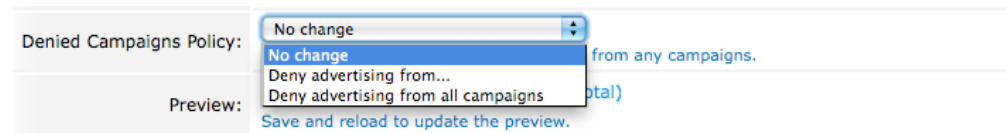
NOTE   The **Denied Campaigns Policy** is applied after the **Allowed Campaigns Policy** field is processed.

The **Denied Campaigns Policy** supports the following options:

Table 11: Options for the Denied Campaign Policy field

Option	Description
No change	Selecting this option does not modify the list of campaigns allowed by the **Allowed Campaigns Policy**.
Deny advertising in...	Selecting this option will show the **Denied Campaigns** list with which you can specify a list of campaigns to deny.
Deny advertising in all campaigns	Selecting this option will deny advertising from all advertising campaigns.

Denied Campaigns: Choose specific campaigns to *remove* from the list of campaigns to use.
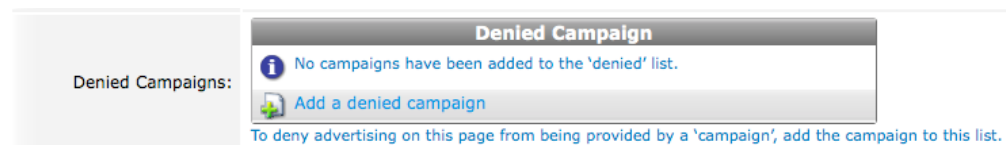
NOTE   This field is shown or hidden based on the option you select for the **Denied Campaigns Policy** field.

Any advertising campaign listed here will be not be used to show advertisements on the page. This field is often used to specify an *exception* to an *allow all* specification.

For example, say there are three enabled advertising campaigns: *Spring*, *Summer* and *Winter*. With the **Allowed Campaigns Policy** set to *Allow advertising from all campaigns*, all three campaigns would be used. If you only wanted *Spring* and *Summer* to be allowed, then set the **Denied Campaigns Policy** to *Deny advertising from...* and add *Winter* to the **Denied Campaigns** list.

To add a denied campaign to an empty list, click the **Add a denied campaign** link.

If the list already has campaigns in it, clicking on a row will show an *action row* with a number of commands that can be executed for that row:

- **Remove** – remove the campaign from the list of explicitly denied advertising campaigns

- **Move up** – position the row higher in the list

- **Move down** – position the row lower in the list

- **Insert before** – insert a row before this row so that another campaign can be denied

- **Insert after** – insert a row after this row so that another campaign can be denied

4.1.2.4   *Saving*

When you are satisfied that you have the correct settings:

- Click the **Save** button to save your advertising page settings and return to the pages list.

- Click the **Save and Reload** button to save your advertising page settings and reload the page editor.

4.2   Spaces

A **space** determines what types of **materials** can be shown (e.g. images, text, and/or SMS advertisements) and, in the case of images, any constraints on the size of the advertisement.

For example, size constraints on a 'top' space would normally ensure that only wide but short images are displayed. Whereas the constraints on a 'right'

space would often allow any type of advertisement but require that it be narrower (e.g. 300 pixels wide).

A **space** is configured to deliver advertisements to a particular location on a **page**, such as the *top*, *bottom*, *left* or *right*. There is also a special *interstitial* location that can briefly replace the main content of the page.

4.2.1   Space List

The spaces list (Advertising Services » Spaces) provides a list of the current advertising spaces. Spaces can be created, edited, deleted, enabled, disabled and copied.

4.2.1.1   Spaces list entries

Each of the items in the spaces list represents a single advertising space.

There are two kinds of advertising spaces: **built-in** and **custom**. The built-in advertising spaces are created automatically by the Advertising Services plugin; they can be edited (with certain restrictions), but they cannot be deleted. You may also create, edit and delete your own *custom* advertising spaces (**full edition** only).

To create a custom advertising space, click the ![icon] **Create new advertising space** link located above the spaces list.

To operate on an existing space, click on the relevant item in the spaces list. An *action row* will be shown containing a list of action links that you may click:

- ![icon] **Edit** – edit the advertising space.

- ![icon] **Delete** – delete the advertising space.

- ![icon] **Disable** – disable the advertising space (stop it from showing advertisements).

- ![icon] **Enable** – enable the advertising space (allow it to show advertisements).

- ![icon] **Copy** – make a copy of an advertising space.

4.2.1.2   Create an advertising space

NOTE   You must have the **full edition** of Advertising Services to create custom advertising spaces.

To create an advertising space:

1. Navigate to the advertising spaces list (Advertising Services » Spaces).

2. Click the ![icon] **Create new advertising space** link; the space editor will be shown.

3. Edit the settings as necessary.

4. Click the ➕ **Create** button or the ➕ **Create and Reload** button.

NOTE   Details on how to use the space editor are given in section 4.2.2 below.

4.2.1.3   *Edit an advertising space*

To edit an advertising space:

1. Navigate to the advertising spaces list (Advertising Services » Spaces).

2. Select the relevant space from the list; an *action row* will be shown.

3. Click the 📝 **Edit** link; the space editor will be shown.

4. Edit the settings as necessary.

5. Click the 💾 **Save Changes** button or the 💾 **Save and Reload** button.

NOTE   Details on how to use the space editor are given in section 4.2.2 below.

4.2.1.4   *Delete an advertising space*

NOTE   Only *custom* advertising spaces can be deleted. If you do not want to use a *built-in* advertising space, you may disable it.

To delete an advertising space:

1. Navigate to the advertising spaces list (Advertising Services » Spaces).

2. Select the relevant space from the list; an *action row* will be shown.

3. Click the ❌ **Delete** link; a confirmation dialog will be shown.

4. Click **OK** to delete the space.

4.2.1.5   *Disable an advertising space*

If you do not want an advertising space to show advertisements, you do not have to delete it, you can simply disable it.

To disable an advertising space:

1. Navigate to the advertising spaces list (Advertising Services » Spaces).

2. Select the relevant space from the list; an *action row* will be shown.

3. Click the ❌ **Disable** link; the space will be disabled without further confirmation.

NOTE   If you see an ✔ **Enable** link instead of a ✖ **Disable** link, then the advertising space has already been disabled.

4.2.1.6   *Enable an advertising space*

To enable an advertising space:

1. Navigate to the advertising spaces list (Advertising Services » Spaces).

2. Select the relevant space from the list; an *action row* will be shown.

3. Click the ✔ **Enable** link; the space will be enabled without further confirmation.

NOTE   The advertising **page** settings also need to allow advertising in each advertising space, before advertising will be delivered in a specific space on a given page.

NOTE   If you see a ✖ **Disable** link instead of an ✔ **Enable** link, then the advertising space has already been enabled.

4.2.1.7   *Copy an advertising space*

NOTE   You must have the **full edition** of Advertising Services to copy an advertising space.

If you want to have multiple advertising spaces in the same location (e.g. one space for images advertisements and another space just for text), then creating a copy of an existing space and making minor modifications as necessary is often the simplest way to achieve such an objective.

To copy an advertising space:

1. Navigate to the advertising spaces list (Advertising Services » Spaces).

2. Select the relevant space from the list; an *action row* will be shown.

3. Click the 🗐 **Copy** link; the space editor will be shown.

4. Review the settings and make any changes as necessary.

5. Click the 🔼 **Create** button or the 🔼 **Create and Reload** button.

NOTE   Details on how to use the space editor are given in section4.2.2 below.

4.2.2   Space Editor

A **space** defines where advertisements are placed on a page. It also uses some simple rules and constraints to select which advertisements to include.

Spaces have a **name**, **rank** and **description**, can be **enabled** and disabled, and they can be positioned in one of a number of predefined **locations** on a

page. Spaces have **geometry** constraints that control the allowed size of advertisements and **material** constraints that control the types of advertisements allowed.

4.2.2.1   General Properties

The **General Properties** section allows you to configure a meaningful **name** for your custom advertising spaces, whether a space is **enabled** or disabled, the **rank**, a **description**, and the preset **location** of the advertising space on the page.

Name: The name of the advertising space.

* Name:	Enter a name for this space.

* Name:	Page Top (built-in)

NOTE   If the advertising space is a *built-in* space, then this name cannot be edited. If it is a *custom* advertising space, then you may use this field to provide a meaningful name for the space.

Enabled: Enables or disables advertising in this space.

Enabled:	☑ Use this space Check this box to allow promotions to be shown in this space.

If an advertising space is disabled, it will not show any advertisements. To enable advertising in this space, ensure that this checkbox is ticked.

NOTE   The advertising **page** settings also need to allow advertising in each advertising space, before advertising will be delivered in a specific space on a given page.

Rank: Defines the order in which advertising spaces are placed when they are in the same **location**.

* Rank:	10 Use the rank to place one space before another. A rank of 1 (one) is higher than a rank of 2.

If you have multiple advertising spaces that have been defined to be in the same **location**, then you can modify the rank to ensure that they are output in the order you desire.

For example, say that you have two spaces defined for the **Page Right** location. The first space (let's name it *Page Right Image*) is to be placed above the second space (named *Page Right Text*). If you configure *Page Right Image* to have a rank of 1, and *Page Right Text* to have a rank of 2, then *Page Right Image* (rank 1) will be placed above *Page Right Text* (rank 2).

Description: Additional notes to associate with the advertising
                                   space.

The **Description** field is provided as a simple place for you to make any
notes that may be of relevance for your system.

Location: Select where the advertising space is to be placed.

NOTE   If the advertising space is a *built-in* space, then the **Location** cannot be
            edited. If it is a *custom* advertising space, then you may use this field to
            define where on each target page advertisements will be delivered.

The **Location** field supports the following options:

Table 12: Options for the Location field

Option	Description
None – for manually positioned spaces	Select this option if you intend to use the **nwa_adspace** Smarty Template tag (§4.2.3) and to only specify the **name** parameter (not the **location** parameter).
Page Top – above content	Select this option to have this advertising space deliver advertisements above the main content of a web page.
Page Left – to the left of content	Select this option to have this advertising space deliver advertisements to the left of the main content of a web page.
Page Bottom – below content	Select this option to have this advertising space deliver advertisements below the main content of a web page.
Page Right – to the right of content	Select this option to have this advertising space deliver advertisements to the right of the main content of a web page.

Option	Description
Page Interstitial – briefly replaces content	Select this option to have this advertising space deliver advertisements, briefly replacing the main content of a web page.
SMS Top – above content	Select this option to have this advertising space deliver advertisements above the main content of an SMS message.
SMS Bottom – below content	Select this option to have this advertising space deliver advertisements below the main content of an SMS message.
Other – for user defined locations	Select this option if you intend to use the **nwa_adspace** Smarty Template tag (§4.2.3) to define a custom location by specifying the **location** parameter (not the **name** parameter).

Other Location: Provide a name for a custom location.

Other Location: [   ]
Enter the name of a 'location' where the advertising space is to be placed.

NOTE   The **Other Location** field is only shown if the **Location** field has been set to *Other – for user defined locations*.

You can use the **Other Location** field to define a name for a custom location. The custom location can then be referenced in any *Smarty Template* by using the **nwa_adspace** Smarty Template tag.

For example, you may wish to add a custom advertising space that is positioned on the far right edge of the registration page. This could be achieved by:

1. Creating a custom space that has an **Other Location** of *custom_right*.

2. Editing the **Footer HTML** of a guest self-registration page to include a **nwa_adspace** Smarty Template tag as follows:

```
{nwa_adspace media="web"
             location="custom_right"
             stage="web_registration"
             container="div"
             style="position:absolute; left:839px; top:92px;
                    width:320px; margin:20px 0 0 20px;"}
```

NOTE   See the amigopod Deployment Guide for more information about *Smarty Templates*.

NOTE   See section 4.2.3 below for details on the **nwa_adspace** Smarty Template tag.
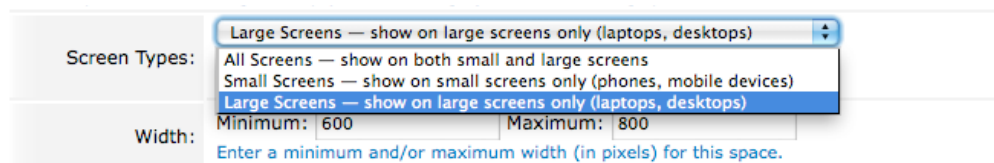
4.2.2.2   Geometry

The **Geometry** section allows you to configure size constraints for your advertising space, such as the **screen type** this space is designed for, the minimum and maximum **width** and **height** of the space (and therefore the minimum and maximum size of the advertisements displayed within), and the maximum number of **rows** and **columns** of advertisements to display.

Screen Types: Limit what types of screen will show this advertising space.

NOTE   This setting is only applicable for web advertising.

Some devices, such as desktop computers and laptops have a large screen, whereas other devices, such as smart phones (e.g. iPhone) have a small screen. Delivering large advertisements to small screens, while possible, does not provide the best user experience.

Therefore, an advertising space can be configured so that it is only displayed on a large screen or only displayed on a small screen. Typically, the **width** and **height** constraints would also be set to values that are appropriate for the selected screen type.

The **Screen Types** field supports the following options:

Table 13: Options for the Screen Types field

Option	Description
All screens – show on both small and large screens	Select this option to ignore the detected screen type.
Small screens – show on small screens only (phones, mobile devices)	Only if the user's device is detected as being a small screen device, will this advertising space be shown.
Large screens – show on large screens only (laptops, desktops)	Only if the user's device is detected as being a large screen device, will this advertising space be shown.

NOTE   The screen type is detected by looking at the browser's *User Agent* value. Laptops, desktops and devices like the iPad, will be treated as *large screen* devices. Smart phones (like the iPhone) and other mobile devices, will be treated as *small screen* devices.

NOTE   While we endeavor to correctly detect the screen type for as many devices as possible, we are unable to test every possible device, and so do **not** claim detection to be correct for all devices.

Minimum Width: Specify an optional minimum width (in pixels) for advertising materials shown in this space.

If an advertisement has a size (e.g. an image, Flash or YouTube advertisement), the width of that advertisement must be at least as large the minimum width if it is to be shown in this space.

Leave the minimum width field empty if you do not want to have a minimum width constraint.

Maximum Width: Specify an optional maximum width (in pixels) for this space (and therefore the advertising materials shown in this space).

If an advertisement has a size (e.g. an image, flash or YouTube advertisement), the width of that advertisement must be no larger than the maximum width if it is to be shown in this space.

Leave the maximum width field empty if you do not want to have a maximum width constraint.

✔ **BEST PRACTICE**

Because an advertising space also has *padding* it is considered best practice to set the maximum width constraint to be 20 pixels wider than the widest image you wish to display in this space.

Minimum Height: Specify an optional minimum height (in pixels) for advertising materials shown in this space.

If an advertisement has a size (e.g. an image, flash or YouTube advertisement), the height of that advertisement must be at least as large the minimum height if it is to be shown in this space.

Leave the minimum height field empty if you do not want to have a minimum height constraint.

Maximum Height: Specify an optional maximum height (in pixels) for this space (and therefore the advertising materials shown in this space).

If an advertisement has a size (e.g. an image, flash or YouTube advertisement), the height of that advertisement must be no larger than the maximum height if it is to be shown in this space.

Leave the maximum height field empty if you do not want to have a maximum height constraint.

> ✔ **BEST PRACTICE**
> Because an advertising space also has *padding* it is considered best practice to set the maximum height constraint to be 20 pixels taller than the tallest image you wish to display in this space.

Maximum Rows: The maximum number of rows of advertisements to show in this space.

Maximum Rows:	
	Enter a maximum number of rows.

An advertising space can show multiple rows of advertisements, up to the maximum number of rows specified (which is always at least one).

NOTE If a **maximum height** has been specified, the system will only output as many rows as can fit within the maximum height constraint for the space.

For example, with a maximum height constraint of 100 and a maximum rows constraint of 3, the advertising system could output:

- three rows with heights 40, 40 and 20,
- three rows with heights 30, 30 and 30,
- two rows with heights 60 and 40,
- two rows with heights 50 and 50,
- one row of height 80, or
- one row of height 100.

Maximum Columns: The maximum number of columns of advertisements to show in this space.

Maximum Columns:	
	Enter a maximum number of columns.

An advertising space can show multiple columns of advertisements, up to the maximum number of columns specified (which is always at least one).

NOTE If a **maximum width** has been specified, the system only output as many columns as can fit within the maximum width constraint for the space.

For example, with a maximum width constraint of 100 and a maximum columns constraint of 3, the advertising system could output:

- three columns with widths 40, 40 and 20,
- three columns with widths 30, 30 and 30,
- two columns with widths 60 and 40,
- two columns with widths 50 and 50,

- one column of width 80, or

- one column of width 100.

4.2.2.3   Promotional Material Constraints

The **Promotional Material Constraints** section allows you to configure the **allowed material** types for your advertising space.

Allowed Material: Select which material types are allowed in this advertising space.

Use the **Allowed Material** checklist to configure which types of advertising materials can be shown in the advertising space, by selecting the types you want shown and clearing the types you do not want shown.

Use the **Select all** and **Clear all** links to quickly change your configuration for all types.

4.2.2.4   Creating and Saving

When you are satisfied that you have the correct settings, if you are creating a new advertising space:

- Click the **Create** button to create your advertising space and return to the spaces list.

- Click the **Create and Reload** button to create your advertising space and reload the space editor.

If you are saving changes to a preexisting advertising space:

- Click the **Save** button to save your advertising space and return to the spaces list.

- Click the **Save and Reload** button to save your advertising space and reload the space editor.

4.2.3 The nwa_adspace Smarty Template tag

NOTE Use of the **nwa_adspace** Smarty Template tag is for advanced users. You need to understand HTML and Smarty Templates to be able to use it correctly.

NOTE Refer to the amigopod Deployment Guide for more information about Smarty Templates and HTML.

The **nwa_adspace** tag can placed into HTML fields that:

1. Support Smarty Template evaluation, and

2. Belong to pages that support advertising.

NOTE To see which pages support advertising, navigate to the pages list (Advertising Services » Pages), which is also described in section 4.1.1 above.

The **nwa_adspace** tag supports the following parameters:

location: The value of the **Location** field that must be set for an advertising **space** to be matched by location.

IMPORTANT You must specify either a **location** or a **name**. The **nwa_adspace** tag will emit an error if you do not specify at least one of these parameters.

If a **location** parameter is specified, then the value of the **location** parameter will be compared to the **Location** field of each advertising space (§4.2.2.1). If the values match, then advertisements will be delivered, at the point in the HTML where the **nwa_adspace** tag is defined, according to any constraints defined by the advertising space.

NOTE To see which **Location** value that a space uses, review the **Location** column in the spaces list (Advertising Services » Spaces), which is also described in section 4.2.1 above.

Advertising spaces support a number of preset **Location** options as well as custom locations via the **Other Location** field. The following values are supported for the location parameter:

Table 14: Values for the location parameter

Value	Description
N/A	None – for manually positioned spaces
web_top	Page Top – above content
web_left	Page Left – to the left of content
web_bottom	Page Bottom – below content
web_right	Page Right – to the right of content
web_interstitial	Page Interstitial – briefly replaces content
sms_top	SMS Top – above content
sms_bottom	SMS Bottom – below content

Value	Description
*Use **Other Location***	Other – for user defined locations

name: The value of the **Name** field that must be set for an advertising **space** to be matched by name.

IMPORTANT You must specify either a **location** or a **name**. The **nwa_adspace** tag will emit an error if you do not specify at least one of these parameters.

If a **name** parameter is specified, then the value of the **name** parameter will be compared to the **Name** field of each advertising space (§4.2.2.1). If the values match, then advertisements will be delivered, at the point in the HTML where the **nwa_adspace** tag is defined, according to any constraints defined by the advertising space.

media: The type of media that advertisements are being delivered to.

IMPORTANT You must specify a **media** value. The **nwa_adspace** tag will emit an error if you do not specify this parameter.

The **media** parameter must be set correctly for the context in which the **nwa_adspace** tag will be processed. The following values are supported for the **media** parameter:

Table 15: Values for the media parameter

Option	Description
sms	Specify this value to deliver SMS advertisements only.
web	Specify this value to deliver Web and Email advertisements only.

stage: The value of the **Stage** field that must be set for an advertising **campaign** to be matched.

IMPORTANT You must specify a **stage** value. The **nwa_adspace** tag will be unable to match any advertising campaigns if you do not specify this parameter.

The **stage** parameter is used when processing advertising campaigns. Only the promotions (or materials) specified at the corresponding **stage** of the advertising campaign will be delivered. The following values are supported for the **stage** parameter:

Table 16: Values for the stage parameter

Value	Description
web_login	Specify this value to deliver advertising on a login page (landing page)
web_registration	Specify this value to deliver advertising on a guest self-registration page

Value	Description
web_receipt	Specify this value to deliver advertising on a receipt page
web_self_service	Specify this value to deliver advertising on a guest self-service page
web_after_login	Specify this value to deliver advertising on a login message page (post-login page)
sms_receipt	Specify this value to deliver advertising on a SMS receipt.

container: The name of an HTML element tag in which advertisements will be placed.

NOTE   This parameter is only relevant when the **media** parameter is set to *web*.

When advertisements are to be delivered to a web page or an email, they can be grouped and their layout controlled more effectively by placing them in a **container**. Typically, a **DIV** container would be used, but other valid HTML tags can be specified.

If the **container** parameter is not specified, then advertisements are delivered to the web page or email without any extra grouping.

style: The style attribute of the HTML **container** element.

NOTE   This parameter is only relevant when the **media** parameter is set to *web* and a HTML tag name has been specified for the **container** parameter.

If you specify a **container**, you can use the **style** parameter to specify style attributes for the **container**. The **style** parameter is optional.

4.3   Campaigns

IMPORTANT   The **full edition** of Advertising Services allows you to create multiple campaigns. The **lite edition** of Advertising Services is limited to a single campaign.

An advertising **campaign** defines which **promotions** and **materials** are to be delivered and at what **stages** they are to be delivered. You can **rank** and **weight** a campaign to balance it against other campaigns. A campaign can also be configured to operate between a specified **start** and **end** date.

NOTE   The system requires at least one advertising campaign to be configured (and enabled) for any advertisements to be delivered.

4.3.1   Campaigns List

IMPORTANT   The **lite edition** of Advertising Services is limited to a single campaign, and therefore does not have a campaigns list.

The campaigns list (Advertising Services » Campaigns) provides a list of the current advertising campaigns. Campaigns can be created, edited, deleted, enabled, disabled and copied.

4.3.1.1   Campaigns list entries

Each of the items in the campaigns list represents a single advertising campaign. You may create, edit, enable, disable, copy and delete your advertising campaigns.

To create an advertising campaign, click the 🟩 **Create new advertising campaign** link located above the campaigns list.

To operate on an existing campaign, click on the relevant item in the campaigns list. An *action row* will be shown containing a list of action links that you may click:

- 📝 **Edit** – edit the advertising campaign

- ❌ **Delete** – delete the advertising campaign

- ❌ **Disable** – disable the advertising campaign (stop it from providing advertisements)

- ✔ **Enable** – enable the advertising campaign (allow it to provide advertisements)

- 📋 **Copy** – make a copy of an advertising campaign

4.3.1.2   Create an advertising campaign

To create an advertising campaign:

1. Navigate to the advertising campaigns list (Advertising Services » Campaigns).

2. Click the 🟩 **Create new advertising campaign** link; the campaign editor will be shown.

3. Edit the settings as necessary.

4. Click the 🟩 **Create** button or the 🟩 **Create and Reload** button.

NOTE   Details on how to use the campaign editor are given in section 4.3.2 below.

4.3.1.3   Edit an advertising campaign

To edit an advertising campaign:

1. Navigate to the advertising campaigns list (Advertising Services » Campaigns).

2. Select the relevant campaign from the list; an *action row* will be shown.

3. Click the 📝 **Edit** link; the campaign editor will be shown.

4. Edit the settings as necessary.

5. Click the 💾 **Save Changes** button or the 📳 **Save and Reload** button.

NOTE   Details on how to use the campaign editor are given in section 4.3.2 below.

4.3.1.4   Delete an advertising campaign

To delete an advertising campaign:

1. Navigate to the advertising campaigns list (Advertising Services » Campaigns).

2. Select the relevant campaign from the list; an *action row* will be shown.

3. Click the ❌ **Delete** link; a confirmation dialog will be shown.

4. Click **OK** to delete the space.

4.3.1.5   Disable an advertising campaign

If you do not want an advertising campaign to provide advertisements, you do not have to delete it, you can simply disable it. To disable an advertising campaign:

1. Navigate to the advertising campaigns list (Advertising Services » Campaigns).

2. Select the relevant campaign from the list; an *action row* will be shown.

3. Click the ✖ **Disable** link; the campaign will be disabled without further confirmation.

NOTE   If you see an ✔ **Enable** link instead of a ✖ **Disable** link, then the advertising campaign has already been disabled.

4.3.1.6   Enable an advertising campaign

To enable an advertising campaign:

1. Navigate to the advertising campaigns list (Advertising Services » Campaigns).

2. Select the relevant campaign from the list; an *action row* will be shown.

3. Click the ✔ **Enable** link; the campaign will be enabled without further confirmation.

NOTE   The advertising **page** settings also need to allow advertising from each advertising campaign before advertising will be delivered from a specific campaign on a given page.

NOTE   If you see a ✖ **Disable** link instead of an ✔ **Enable** link, then the advertising campaign has already been enabled.

4.3.1.7   Copy an advertising campaign

If you want to create a new campaign that is similar to one that you already have, you can simply make a copy. To copy an advertising campaign:

1. Navigate to the advertising campaigns list (Advertising Services » Campaigns).

2. Select the relevant campaign from the list; an *action row* will be shown.

3. Click the 🗐 **Copy** link; the campaign editor will be shown.

4. Review the settings and make any changes as necessary.

5. Click the ✚ **Create** button or the ✚ **Create and Reload** button.

NOTE   Details on how to use the campaign editor are given in section 4.3.2 below.

4.3.2   Campaign Editor

An advertising campaign defines which **promotions** and **materials** are to be delivered and at what **stages** they are to be delivered. Advertising Services supports delivering advertisements at the following **stages**:

- With login

- With registration

- With receipt

- With self-service

- After login

- With SMS receipt

A campaign can be given a **name** and a **description** to help identify and manage it. You can **rank** and **weight** a campaign to balance it against other campaigns. A campaign can also be configured to operate between a specified **start** and **end** date.

4.3.2.1   General Properties

The **General Properties** section allows you to configure a meaningful **name** for your advertising campaign, whether the campaign is **enabled** or disabled, an optional **start** and **end** date during which the campaign is to run, a relative **rank** and **weight** to balance delivery of this campaign with other campaigns, and a **description** with which to record any other relevant information associated with your campaign.

Name: The name of the advertising campaign.

Use this field to provide a meaningful name for the campaign so that you are able to identify it later.

Enabled: Enables or disables advertising from this campaign.

Enabled: ☑ Use this campaign
            Check this box to allow promotions from this campaign to be delivered.

If an advertising campaign is disabled, it will not provide any advertisements. To enable advertising from this campaign, ensure that this checkbox is ticked.

NOTE   The advertising **page** settings also need to allow advertising from each advertising campaign before advertisements will be delivered from a specific campaign on a given page.

Start Date: An optional date after which the campaign may start providing advertisements.

Start Date: [   ] (…)
               The campaign will not take effect until this date.

To specify a start date, you may either enter a date in the text field, or click the associated button (…) and select a date. You may also specify a time with the date.

If you want your campaign to start providing advertisements immediately, leave this field blank.

End Date: An optional date after which the campaign will stop providing advertisements.

End Date: [   ] (…)
             The campaign is ignored from this date.

To specify an end date, you may either enter a date in the text field, or click the associated button (…) and select a date. You may also specify a time with the date.

If you want your campaign to continue providing advertisements indefinitely, leave this field blank.

Rank: Defines the order in which advertising campaigns are processed when delivering advertisements.

 * Rank: [10   ]
            Use the rank to always choose one campaign before another. A rank of 1 (one) is higher than a rank of 2.

If you have multiple advertising campaigns that have been defined to provide advertisements at the same time and stage, then you can modify the rank to ensure that advertisements are sourced from the campaigns in the order you desire.

For example, say that you have two campaigns defined. The first campaign (let's call it *Special Event Campaign*) is to take priority over the second campaign (let's call it *Default Campaign*). If you configure *Special Event Campaign* to have a rank of 1, and *Default Campaign* to have a rank of 2, then *Special Event Campaign* will always be checked for advertisements before *Default Campaign*.

Weight: Defines the relative weight assigned to an
                                     advertising campaign when multiple campaigns are
                                     processed for the delivery of advertisements.

> 1.0
>
> * Weight: When campaigns are of equal rank, the weight is used to give more (or less) exposure to this campaign
> compared to the others.

If you have multiple advertising campaigns that have been defined to provide
advertisements at the same time and stage, then you can modify the weight
to ensure that, on average, more advertisements are sourced from
campaigns with a higher weight, and that this is done in proportion to the
relative weights of each campaign.

For example, say that you have two campaigns defined. The first campaign
(let's call it *Special Event Campaign*) is to provide twice as many
advertisements as a second campaign (let's call it *Seasonal Campaign*). If
you configure *Special Event Campaign* to have a weight of 10, and *Seasonal
Campaign* to have a weight of 5, then *Special Event Campaign* will be
checked for advertisements twice as often as the *Seasonal Campaign*.

Description: Additional notes to associate with the advertising
                                     campaign.

> Description:
>
> Enter comments or notes about this campaign.

The Description field is provided as a simple place for you to make any notes
that may be of relevance for your system.

4.3.2.2   *Web Promotions Delivery*

The **Web Promotions Delivery** section allows you to configure which
promotions and **materials** (if any) will be delivered at each available stage.
The stages that are available in this section are:

- With login – select the promotion to deliver on the login page
  (landing page)

- With registration – select the promotion to deliver on the guest
  self-registration page

- With receipt – select the promotion to deliver on receipt pages

- With self-service – select the promotion to deliver on the guest
  self-service pages

- After login – select the promotion to deliver on the login message
  page (post-login page)

To deliver advertisements at a given stage from a given **promotion**, select the relevant promotion from the associated dropdown. You may also select a **material** from the dropdown, if only a single material is required, but this type of usage is rare.

If you do not want to deliver advertisements at a particular stage, select the — *None* — option from the associated dropdown.

4.3.2.3   SMS Promotions Delivery

The **SMS Promotions Delivery** section allows you to configure which **promotions** and **materials** (if any) will be delivered at the SMS receipt stage, *With receipt*.

With receipt: Select the promotion to deliver on the SMS receipt.

To deliver advertisements at the SMS receipt stage from a given **promotion**, select the relevant promotion from the associated dropdown. You may also select a **material** from the dropdown, if only a single material is required, but this type of usage is rare.

If you do not want to deliver advertisements at the SMS receipt stage, select the — *None* — option from the associated dropdown.

4.3.2.4   Creating and Saving

When you are satisfied that you have the correct settings, if you are creating a new advertising campaign:

- Click the **Create** button to create your advertising campaign and return to the campaigns list.

- Click the **Create and Reload** button to create your advertising campaign and reload the campaign editor.

If you are saving changes to a preexisting advertising campaign:

- Click the **Save** button to save your advertising campaign and return to the campaigns list.

- Click the **Save and Reload** button to save your advertising campaign and reload the campaign editor.

4.4   Promotions

Most of the rules that determine how and when advertisements are to be delivered are defined in a **promotion**. These rules are applied to all of the advertising **materials** that the promotion includes, whether those materials are included directly or indirectly.

A promotion can include both materials and/or other promotions. You can use this feature to build simple groupings of materials with simple rules or more complex groupings of materials and promotions with more complex rules.

Promotions can **enabled** and disabled, and have a **start** and **end** date. Promotions can also be assigned any number of **labels**. Promotions can include materials and/or other promotions using a *fixed*, *rotating*, *weighted* or *labelled* content selection **type**.

A promotion can also be configured to provide **intelligent delivery**, which uses **labels** to match users with more personally relevant advertisements (**full edition** only).

4.4.1   Promotion List

The promotions list (Advertising Services » Promotions) provides a list of the current advertising promotions. Promotions can be created, edited, deleted, enabled, disabled and copied.

4.4.1.1   Promotions list entries

Each of the items in the promotions list represents a single advertising promotion. You may create, edit, enable, disable, copy and delete your advertising promotions.

To create an advertising promotion, click the **Create new advertising promotion** link located above the promotions list.

To operate on an existing promotion, click on the relevant item in the promotions list. An *action row* will be shown containing a list of action links that you may click:

- **Edit** – edit the advertising promotion

- **Delete** – delete the advertising promotion

- **Disable** – disable the advertising promotion (stop it from providing advertisements)

- **Enable** – enable the advertising promotion (allow it to provide advertisements)

■ **Copy** – make a copy of an advertising promotion

4.4.1.2 Create an advertising promotion

To create an advertising promotion:

1. Navigate to the advertising promotions list (Advertising Services » Promotions).

2. Click the **Create new advertising promotion** link; the promotion editor will be shown.

3. Edit the settings as necessary.

4. Click the **Create** button or the **Create and Reload** button.

NOTE   Details on how to use the promotion editor are given in section 4.4.2 below.

4.4.1.3 Edit an advertising promotion

To edit an advertising promotion:

1. Navigate to the advertising promotions list (Advertising Services » Promotions).

2. Select the relevant promotion from the list; an *action row* will be shown.

3. Click the **Edit** link; the promotion editor will be shown.

4. Edit the settings as necessary.

5. Click the **Save Changes** button or the **Save and Reload** button.

NOTE   Details on how to use the promotion editor are given in section 4.4.2 below.

4.4.1.4 Delete an advertising promotion

To delete an advertising promotion:

1. Navigate to the advertising promotion list (Advertising Services » Promotions).

2. Select the relevant promotion from the list; an *action row* will be shown.

3. Click the **Delete** link; a confirmation dialog will be shown.

4. Click **OK** to delete the promotion.

4.4.1.5   *Disable an advertising promotion*

If you do not want an advertising promotion to provide advertisements, you do not have to delete it, you can simply disable it. To disable an advertising promotion:

1. Navigate to the advertising promotions list (Advertising Services » Promotions).

2. Select the relevant promotion from the list; an *action row* will be shown.

3. Click the ❌ **Disable** link; the promotion will be disabled without further confirmation.

NOTE   If you see an ✔ **Enable** link instead of a ❌ **Disable** link, then the advertising promotion has already been disabled.

4.4.1.6   *Enable an advertising promotion*

To enable an advertising promotion:

1. Navigate to the advertising promotions list (Advertising Services » Promotions).

2. Select the relevant promotion from the list; an *action row* will be shown.

3. Click the ✔ **Enable** link; the promotion will be enabled without further confirmation.

NOTE   If you see a ❌ **Disable** link instead of an **Enable** link, then the advertising promotion has already been enabled.

4.4.1.7   *Copy an advertising promotion*

If you want to create a new promotion that is similar to one that you already have, you can simply make a copy. To copy an advertising promotion:

1. Navigate to the advertising promotions list (Advertising Services » Promotions).

2. Select the relevant promotion from the list; an *action row* will be shown.

3. Click the ⧉ **Copy** link; the promotion editor will be shown.

4. Review the settings and make any changes as necessary.

5. Click the 🌱 **Create** button or the 🌱 **Create and Reload** button.

NOTE   Details on how to use the promotion editor are given in section 4.4.2 below.

4.4.2   Promotion Editor

A **promotion** defines rules that determine how and when advertisements are to be delivered.

Promotions have a **name** and **description**, can be **enabled** and disabled, and have a **start** and **end** date. Promotions can also be assigned any number of **labels**. Promotions include materials and/or other promotions using a *fixed*, *rotating*, *weighted* or *labelled* content selection **type**.

A promotion can also be configured to provide **intelligent delivery**, which uses **labels** to match users with more personally relevant advertisements (**full edition** only).

4.4.2.1   General Properties

The **General Properties** section allows you to configure a meaningful **name** for your advertising promotion, whether the promotion is **enabled** or disabled, an optional **start** and **end** date during which the promotion can provide advertisements, a **description** with which to record any other relevant information associated with your promotion, any number of **labels** to apply to this promotion, and the **type** of this promotion.

Name: The name of the advertising promotion.

> * Name: _____
> Enter a name for this promotion.

Use this field to provide a meaningful name for the promotion so that you are able to identify it later.

Enabled: Enables or disables advertising from this promotion.

> Enabled: ☑ Use this promotion
> Check this box to allow this promotional material to be delivered.

If an advertising promotion is disabled, it will not provide any advertisements. To enable advertising from this promotion, ensure that this checkbox is ticked.

Start Date: An optional date after which the promotion may start providing advertisements.

> Start Date: _____ (...)
> Ensure that the promotional material is not delivered until this time.

To specify a start date, you may either enter a date in the text field, or click the associated button (…) and select a date. You may also specify a time with the date.

If you want your promotion to start providing advertisements immediately, leave this field blank.

End Date: An optional date after which the promotion will stop providing advertisements.

> End Date: _____ (...)
> Ensure that the promotional material is not delivered after this time.

To specify an end date, you may either enter a date in the text field, or click the associated button (…) and select a date. You may also specify a time with the date.

If you want your promotion to continue providing advertisements indefinitely, leave this field blank.

Description: Additional notes to associate with the advertising promotion.

The **Description** field is provided as a simple place for you to make any notes that may be of relevance for your system.

Labels: A comma and/or new line separated list of labels to assign to this promotion.

The labels entered here will be used in two cases:

1. These labels can be used to include or exclude this promotion when creating another higher-level *labelled content* promotion.

2. These labels are applied, when processing intelligent delivery rules, to all materials that are included, either directly or indirectly, by this promotion.

Type: The type of content selection rule to use.

The content selection **Type** supports the following options:

Table 17: Options for the Type field

Option	Description
Fixed content	Select this option to choose a single promotion or material to include in this promotion.
Rotating content	Select this option to provide an equally balanced delivery of an explicitly selected list of promotions and/or materials.
Weighted content	Select this option to provide a weighted delivery of an explicitly selected and weighted list of promotions and/or materials.
Labelled content	Select this option to provide an equally balanced delivery of a list of promotions and/or materials selected by matching labels.

> ✓ **BEST PRACTICE**
> When creating a promotion that will provide a large number of advertisements with equal weighting, use a labelled promotion and label your materials accordingly. This is the simplest way to manage a promotion with a large number of advertisements.

4.4.2.2   Fixed Content

NOTE   The **Fixed Content** section is only visible if the **Type** is set to: *Fixed content*.

The **Fixed Content** section allows you to specify a single promotion or material to include.

Content: The promotion or material to deliver when this promotion is processed.

To deliver a specific promotion or material, click the **Content** dropdown and select the desired option. If you do not want to deliver a specific promotion or material at this time, you may choose the — *None* — option from the list.

Selected Content: The *hierarchy* of the content that will be selected using the latest setting for **Type** and that type's associated settings.

NOTE   The **Selected Content** is not updated until your changes have been saved.

4.4.2.3   Rotating Content

NOTE   The **Rotating Content** section is only visible if the **Type** is set to: *Rotating content*.

The **Rotating Content** section allows you to specify a list of promotions and/or materials to include, which will be delivered in equally balanced proportions.

Content Items: The list of promotions and/or materials to deliver when this promotion is processed.

To add a new content item (promotion or material) when the **Content Items** list is empty, click the **Add content** link, and then choose the desired option from the dropdown.

If the list already has content items in it, clicking on a row will show an *action row* with a number of commands that can be executed for that row:

- **Remove** – remove the item from the list of included promotions and materials

- **Move up** – position the row higher in the list

- **Move down** – position the row lower in the list

- **Insert before** – insert a row before this row so that another promotion or material can be allowed

- **Insert after** – insert a row after this row so that another promotion or material can be allowed

The content item selected in any row can also be changed by clicking the associated dropdown, and then choosing an alternative option.

Selected Content: The *hierarchy* of the content that will be selected using the latest setting for **Type** and that type's associated settings.

NOTE The **Selected Content** is not updated until your changes have been saved.

4.4.2.4 *Weighted Content*

NOTE The **Weighted Content** section is only visible if the **Type** is set to: *Weighted content*.

The **Weighted Content** section allows you to specify a list of promotions and/or materials to include, which will be delivered in weighted proportions.

Content Items: The list of weighted promotions and/or materials to deliver when this promotion is processed.
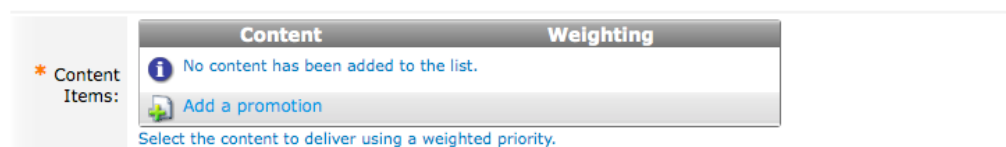
To add a new content item (promotion or material) when the **Content Items** list is empty, click the **Add content** link, then choose the desired option from the dropdown and enter the desired weight in the text field.

If the list already has content items in it, clicking on a row will show an *action row* with a number of commands that can be executed for that row:

- **Remove** – remove the item from the list of included promotions and materials

- **Move up** – position the row higher in the list

- **Move down** – position the row lower in the list

- **Insert before** – insert a row before this row so that another promotion or material can be allowed

- **Insert after** – insert a row after this row so that another promotion or material can be allowed

The content item selected in any row can also be changed by clicking the associated dropdown, then and choosing an alternative option.

The *weight* of an item can be changed by entering a new numerical value in the associated text field.

To illustrate how the *weights* affect selection, assume that are three items, A, B and C with weights 2, 3 and 5, then:

- Item A would be chosen for delivery, on average, 2 out of every 10 times (2 + 3 + 5 is 10)

- Item B would be chosen for delivery, on average, 3 out of every 10 times, and

- Item C would be chosen for delivery, on average, 5 out of every 10 times.

Selected Content: The *hierarchy* of the content that will be selected using the latest setting for **Type** and that type's associated settings.

NOTE   The **Selected Content** is not updated until your changes have been saved.

4.4.2.5   Labelled Content

NOTE   The **Labelled Content** section is only visible if the **Type** is set to: *Labelled content*.

The **Labelled Content** section allows you to specify labels that are matched to include (and exclude) promotions and/or materials. The selected items will be delivered in equally balanced proportions.

Content Types: Select the types of content to include in this promotion.

The **Content Types** setting allows you to choose whether to include materials and/or other promotions. The **Content Types** setting provides the following options:

Table 18: Options for the Content Types field

Option	Description
All content types	Select this option to include both promotions and materials.
Materials only	Select this option to include materials only.
Promotions only	Select this option to include promotions only.

Inclusion Mode: Select how the list of **Inclusive Labels** is to be matched to the available content.

The **Inclusion Mode** setting provides the following options:

Table 19: Options for the Inclusion Mode field

Option	Description
All of the 'inclusive labels' must match	Select this option to require that *all* of the labels listed in the **Inclusive Labels** field must also be listed in the **Labels** field of a prospective promotion or material, for that content to be included.
At least one of the 'inclusive labels' must match	Select this option to require that at least one of the labels listed in the **Inclusive Labels** field must be listed in the **Labels** field of a prospective promotion or material, for that content to be included.

Inclusive Labels: For content (promotions and materials) to be included in this promotion, it must match these labels (according to the **Inclusion Mode** field).

The **Inclusive Labels** field may contain a comma or new line separated list of labels. These labels are compared to the labels of all of the other promotions and materials in the system (taking into account the option selected for the **Content Types** field).

If the labels of a promotion or material match the **Inclusive Labels** (taking into account the option selected for the **Inclusion Mode** field), then the promotion or material will be included in this promotion, but only if the **Exclusive Labels** are not matched.

Exclusion Mode: Select how the list of **Exclusive Labels** is to be matched to the available content.

The **Exclusion Mode** setting provides the following options:

Table 20: Options for the Exclusion Mode field

Option	Description
All of the 'exclusive labels' must match	Select this option to require that *all* of the labels listed in the **Exclusive Labels** field must also be listed in the **Labels** field of a prospective promotion or material, for that content to be excluded.
At least one of the 'exclusive labels' must match	Select this option to require that at least one of the labels listed in the **Exclusive Labels** field must be listed in the **Labels** field of a prospective promotion or material, for that content to be excluded.

Exclusive Labels: If content (promotions and materials) matches these labels (according to the **Exclusion Mode** field), it will be excluded from this promotion.

The **Exclusive Labels** field may contain a comma or new line separated list of labels. These labels are compared to the labels of the promotions and materials that are selected when matching the **Inclusive Labels**.

If the labels of a promotion or material match the **Exclusive Labels** field (taking into account the option selected in the **Exclusion Mode** field), then that content will be excluded.

Selected Content: The *hierarchy* of the content that will be selected using the latest setting for **Type** and that type's associated settings.

> Selected | ↓ show selected items (2 total).
> Content: | Save and reload to update the preview.

NOTE The **Selected Content** is not updated until your changes have been saved.

4.4.2.6 Intelligence

IMPORTANT The **Intelligence** section is only available in the **full edition** of Advertising Services. Ignore this section if you are using the **lite edition**.

The **Intelligence** section allows you to specify whether a promotion is to **enable** intelligent delivery of advertising, and if so, which user **labels** should be matched and with what **requirement level**.

Enabled: Check this box to enable **intelligent delivery** through matching *user* labels to *material* labels.

> Enabled: | ☑ Enable intelligent delivery.
> Check this box to enable a more selective delivery by matching user labels to material labels.
> Note that a material will also 'inherit' the labels from the promotions that include it (either directly or indirectly).

If you want this promotion to deliver advertisements to a user, which are more personally relevant, then enable **intelligent delivery** by ticking the checkbox.

If you want the promotion to provide advertisements without regard to a user's personal preferences, then disable intelligent delivery by removing the tick from the checkbox.

NOTE When intelligent delivery has been enabled for a promotion, the intelligence settings are applied to all included promotions and materials while delivering advertisements. The intelligence settings are *inherited* by included promotions and materials.

Requirement Levels: Specify how often a particular label should be matched.

> Requirement | **Labels   Requirement Level**
> Levels: | ⓘ No labels have been added to the list.
> | 🔖 Add a label
> Edit how often particular labels should be matched.
> These settings override the 'default level' below.

NOTE The **Requirement Levels** field will only be shown if intelligent delivery is **Enabled**.

Using the **Requirement Levels** list, you can specify which labels are to be matched and how often they are to be matched.

NOTE These settings override the **Default Level** setting.

To add a new required label when the **Requirement Levels** list is empty, click the ![icon] **Add a label** link, and then choose the desired label from the **Labels** column dropdown and the desired requirement level from the **Requirement Level** column dropdown.

If the list already has items in it, clicking on a row will show an *action row* with a number of commands that can be executed for that row:

- ![icon] **Remove** – remove the item from the list of user labels to match

- ![icon] **Move up** – position the row higher in the list

- ![icon] **Move down** – position the row lower in the list

- ![icon] **Insert before** – insert a row before this row so that another user label can be added

- ![icon] **Insert after** – insert a row after this row so that another user label can be added
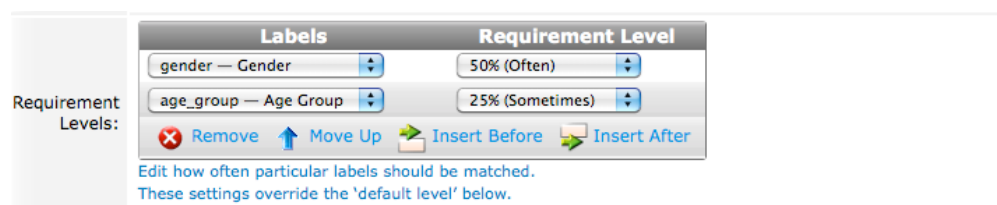
The **Labels** column dropdown contains a list of the available user label *groups* that can be used. These groups are derived from custom fields.

IMPORTANT   Only checkboxes, checklists, radio buttons and dropdowns can produce user labels.

The **Requirement Level** column dropdown supports the following options:

Table 21: Options for the Requirement Level field

Option	Description
0% (Ignore)	Select this option to ignore the associated labels when processing intelligent delivery rules.
25% (Sometimes)	Select this option to match the associated labels, on average, 25% of the time. That is, for every 4 advertisements delivered, on average, 1 advertisement must match the associated labels.
50% (Often)	Select this option to match the associated labels, on average, 50% of the time. That is, for every 4 advertisements delivered, on average, 2 advertisements must match the associated labels.

Option	Description
75% (Mostly)	Select this option to match the associated labels, on average, 75% of the time. That is, for every 4 advertisements delivered, on average, 3 advertisements must match the associated labels.
100% (Always)	Select this option to match the associated labels every time an advertisement is delivered. The user will only ever receive matching advertisements.

An example will best illustrate how to use this field: let's say that you have configured your **Guest Self-Registration** form to collect the gender and age group of a user, by adding the following custom fields:

- gender – radio buttons – Female or Male.

- age_group – dropdown – 0 to 19, 20 to 29, 30 to 39, 40 to 49, 50 to 59, 60 to 69, or 70+.

These two custom fields provide the following *user labels*:

- gender Female

- gender Male

- age_group 0 to 19

- age_group 20 to 29

- age_group 30 to 39

- age_group 40 to 49

- age_group 50 to 59

- age_group 60 to 69

- age_group 70+

One user, Sarah, who is a 22 year-old female, on registration would have the *user labels*:

- gender Female

- age_group 20 to 29

Another user, Bradley, who is a 34 year-old male, on registration would have the *user labels*:

- gender Male

- age_group 30 to 39

The **Requirement Levels** have been configured to require that:

- *gender* is to be matched *50%* of the time, and

- *age_group* is to be matched *25%* of the time.

With these settings, the balance of advertisements delivered to Sarah and Bradley would be as follows:

- **50%** of Sarah's advertisements would be labelled with **gender Female**.

- **25%** of Sarah's advertisements would be labelled with **age_group 20 to 29**.

- **50%** of Bradley's advertisements would be labelled with **gender Male**.

- **25%** of Bradley's advertisements would be labelled with **age_group 30 to 39**.

IMPORTANT A user who is labelled with a user label can be matched to any advertisement that is (a) also labelled with the same label, or (b) is not labelled with *any* of the labels from the corresponding label *group*.

For example, a user who is labelled with **gender Female** can be matched to any advertisement that is labelled with **gender Female**. They can also be matched to any advertisement that is not labelled with *any* of the gender labels; that is, any advertisement not labelled with **gender Female** and not labelled with **gender Male**.

Therefore, an advertisement can be *gender agnostic* by simply omitting all gender labels. You do not need to label an advertisement with both gender Female and gender Male for it to be gender agnostic.

Default Level: Specify how often all 'other' labels should be matched.

NOTE The **Default Level** field will only be shown if intelligent delivery is **Enabled**.

The **Default Level** specifies the requirement level for all *user labels* that are not listed in the **Requirement Levels** field.

The **Default Level** field supports the following options:

Table 22: Options for the Default Level field

Option	Description
0% (Ignore)	Select this option to ignore the associated labels when processing intelligent delivery rules.
25% (Sometimes)	Select this option to match the associated labels, on average, 25% of the time. That is, for every 4 advertisements delivered, on average, 1 advertisement must match the associated labels.

Option	Description
50% (Often)	Select this option to match the associated labels, on average, 50% of the time. That is, for every 4 advertisements delivered, on average, 2 advertisements must match the associated labels.
75% (Mostly)	Select this option to match the associated labels, on average, 75% of the time. That is, for every 4 advertisements delivered, on average, 3 advertisements must match the associated labels.
100% (Always)	Select this option to match the associated labels every time an advertisement is delivered. The user will only ever receive matching advertisements.

Defined Labels: Shows a list of the currently available user labels.

The **Defined Labels** list shows the user labels currently defined in the system. They are provided as a convenience: you may copy these labels into the **Labels** field of materials (and promotions) so that the materials can be matched to users.

4.4.2.7 *Creating and Saving*

When you are satisfied that you have the correct settings, if you are creating a new advertising promotion:

- Click the **Create** button to create your advertising promotion and return to the promotions list.

- Click the **Create and Reload** button to create your advertising promotion and reload the promotion editor.

If you are saving changes to a preexisting advertising promotion:

- Click the **Save** button to save your advertising promotion and return to the promotions list.

- Click the **Save and Reload** button to save your advertising promotion and reload the promotion editor.

4.5 Materials

Advertising **materials** are the individual advertisements that are delivered to users of your system. You can deliver advertisements through a number of different media:

- A web browser,

- E-mail, and

- SMS.

4.5.1 Materials List

The materials list (Advertising Services » Materials) provides a list of the current advertising materials. Materials can be created, edited, deleted, enabled, disabled, copied and previewed.

4.5.1.1 Materials list entries

Each of the items in the materials list represents a single advertisement. You may create, edit, enable, disable, copy, delete and preview your advertising materials.

To create advertising material, click the **Create new advertising material** link located above the materials list.

To operate on an existing material, click on the relevant item in the materials list. An *action row* will be shown containing a list of action links that you may click:

- **Edit** – edit the advertising material

- **Delete** – delete the advertising material

- **Disable** – disable the advertising material (stop it from providing advertisements)

- **Enable** – enable the advertising material (allow it to provide advertisements)

- **Copy** – make a copy of an advertising material

- **Preview** – show an example of how the advertising material will look

4.5.1.2 Create advertising material

To create advertising material:

1. Navigate to the advertising materials list (Advertising Services » Materials).

2. Click the **Create new advertising material** link; the material editor will be shown.

3. Edit the settings as necessary.

4. Click the **Create** button or the **Create and Reload** button.

NOTE   Details on how to use the material editor are given in section 4.5.2 below.

4.5.1.3   Edit advertising material

To edit advertising material:

1. Navigate to the advertising materials list (Advertising Services » Materials).

2. Select the relevant material from the list; an *action row* will be shown.

3. Click the **Edit** link; the material editor will be shown.

4. Edit the settings as necessary.

5. Click the **Save Changes** button or the **Save and Reload** button.

NOTE   Details on how to use the material editor are given in section 4.5.2 below.

4.5.1.4   Delete advertising material

To delete advertising material:

1. Navigate to the advertising materials list (Advertising Services » Materials).

2. Select the relevant material from the list; an *action row* will be shown.

3. Click the **Delete** link; a confirmation dialog will be shown.

4. Click **OK** to delete the material.

4.5.1.5   Disable advertising material

If you do not want a material to be delivered, you do not have to delete it, you can simply disable it. To disable advertising material:

1. Navigate to the advertising materials list (Advertising Services » Materials).

2. Select the relevant material from the list; an *action row* will be shown.

3. Click the **Disable** link; the material will be disabled without further confirmation.

NOTE   If you see an **Enable** link instead of a **Disable** link, then the advertising material has already been disabled.

4.5.1.6   Enable advertising material

To enable advertising material:

1. Navigate to the advertising materials list (Advertising Services » Materials).

2. Select the relevant material from the list; an *action row* will be shown.

3. Click the ✔ **Enable** link; the material will be enabled without further confirmation.

NOTE   If you see a ✖ **Disable** link instead of an ✔ **Enable** link, then the advertising material has already been enabled.

4.5.1.7   Copy advertising material

If you want to create a new material that is similar to one that you already have, you can simply make a copy. To copy advertising material:

1. Navigate to the advertising materials list (Advertising Services » Materials).

2. Select the relevant material from the list; an *action row* will be shown.

3. Click the ▣ **Copy** link; the material editor will be shown.

4. Review the settings and make any changes as necessary.

5. Click the ➕ **Create** button or the ➕ **Create and Reload** button.

NOTE   Details on how to use the material editor are given in section 4.5.2 below.

4.5.1.8   Preview advertising material

To preview advertising material:

1. Navigate to the advertising materials list (Advertising Services » Materials).

2. Select the relevant material from the list; an *action row* will be shown.

3. Click the ▶▶ **Preview** link; a preview of the material will be shown below the action row.

4.5.2   Material Editor

Advertising **materials** are the individual advertisements that are delivered to the users of your system. You can deliver advertising materials through a number of different media:

- A web browser,

- E-mail, and

- SMS.

Materials can be assigned a **name**, **description**, **start date**, **end date** and **enabled** or disabled. The **type** of an advertising material can be a text, image, Flash, raw HTML, YouTube or SMS text advertisement. Materials can also be assigned any number of **labels**, which can be used by promotions to create *labelled promotions* and to provide *intelligent delivery* of advertisements.

4.5.2.1 General Properties

The **General Properties** section allows you to configure a meaningful **name** for your advertising material, whether the material is **enabled** or disabled, an optional **start** and **end** date during which the material can delivered, a **description** with which to record any other relevant information associated with your material, any number of **labels** to apply to this material, and the **type** of this material.

Name: The name of the advertising material.

> * Name:
>
> Enter a name for this material.

Use this field to provide a meaningful name for the material so that you are able to identify it later.

> ✓ **BEST PRACTICE**
> Name all of your materials in a consistent manner. This will make it easier to organize and locate them.

Enabled: Enables or disables delivery of this advertisement.

> Enabled:
> ☑ Use this material
> Check this box to allow this promotional material to be delivered.

If an advertising material is disabled, it will not be delivered. To enable delivery of this advertisement, ensure that this checkbox is ticked.

Start Date: An optional date after which the material may start being delivered.
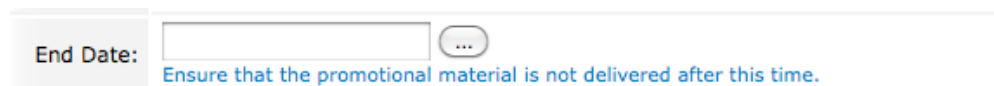
> Start Date:
> [   ] (...)
> Ensure that the promotional material is not delivered until this time.

To specify a start date, you may either enter a date in the text field, or click the associated button (…) and select a date. You may also specify a time with the date.

If you want your material to start being delivered immediately, leave this field blank.

End Date: An optional date after which the material will stop being delivered.

End Date: | [ ] | (...)
Ensure that the promotional material is not delivered after this time.

To specify an end date, you may either enter a date in the text field, or click the associated button (…) and select a date. You may also specify a time with the date.
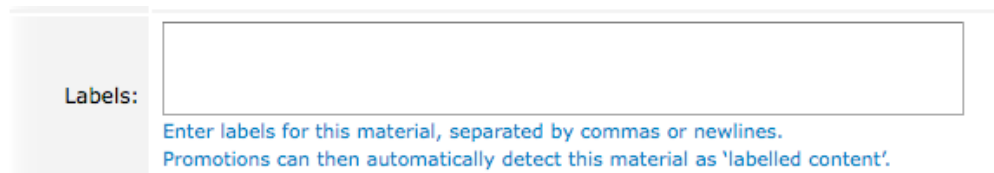
If you want your material to continue being delivered indefinitely, leave this field blank.

Description: Additional notes to associate with the advertising material.

Description: | [   ]
Enter comments or notes about this promotional material.

The **Description** field is provided as a simple place for you to make any notes that may be of relevance for your system.
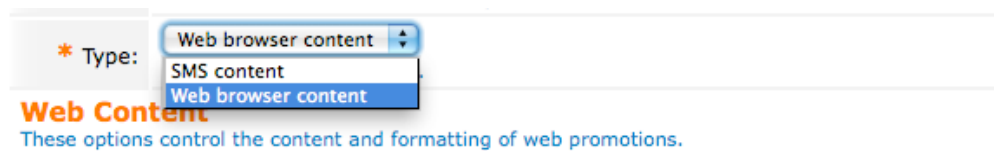
Labels: A comma and/or new line separated list of labels to assign to this material.

Labels: | [   ]
Enter labels for this material, separated by commas or newlines.
Promotions can then automatically detect this material as 'labelled content'.

The labels entered here will be used in two cases:

1. These labels can be used to include or exclude this material when creating a *labelled content* promotion.

2. These labels are matched, when processing the intelligent delivery rules of a promotion that includes this material.

Type: The type of advertising material to deliver.

* Type: | Web browser content ▲▼
          SMS content
          Web browser content
Web Content
These options control the content and formatting of web promotions.

The advertising material **Type** supports the following options:

Table 23: Options for the Type field

Option	Description
SMS content	Select this option if you want to create an advertisement for SMS.
Web browser content	Select this option if you want to create an advertisement for a web browser (or a HTML capable email client). Web browser content supports text, image, Flash, HTML and YouTube advertisements.

4.5.2.2   Web Content

NOTE   The **Web Content** section is only shown if the **Type** field is set to: *Web browser content*.

The **Web Content** section allows you to configure the **format** of your advertisement (text, image, Flash, HTML or YouTube) and associated parameters.

Format: Select the format of your web advertisement.

The **Format** field supports the following options:

Table 24: Options for the Format field

Option	Description
Flash advertisement	Select this option if you want to deliver a Flash advertisement. You will need to select or upload the shockwave flash file (.swf) that contains the content you wish to deliver.
HTML code (advanced)	Select this option if you want to code your own advertisement using raw HTML. This is an advanced feature that should only be used by people who understand how to correctly write HTML code.
Image advertisement	Select this option if you want to deliver an image advertisement. The advertisement may also have an associated click-through *hyperlink*.

Option	Description
Text advertisement	Select this option if you want to deliver a simple text advertisement that has a title, body and footer. Such advertisements are typically only one or two sentences long. The advertisement may also have an associated click-through *hyperlink*.
YouTube video advertisement	Select this option if you want to deliver a YouTube video.

4.5.2.3   Web Content - Flash Properties

NOTE   The Flash properties are only shown if the web content **Format** field has been set to: *Flash advertisement*.

IMPORTANT   Some users may not be able to view Flash advertisements. This may be due to the type of device they are using (e.g. an iPhone) or it may be because they have disabled the Flash player plugin for their web browser.

Flash: Select a Flash advertisement that has already been added to the Content Manager or choose to upload a new file.

The **Flash** field contains a list of shockwave flash files (.swf) that have been uploaded to the Content Manager. If you need to upload a new shockwave Flash file, select the *Upload a new Flash animation* option from the **Flash** field.

Size Limit: Displays the maximum file size that can be uploaded.

New Flash: Upload a new Flash file from your computer.

NOTE   The **New Flash** field is only shown if the **Flash** field has been set to: *Upload a new Flash animation*.

To upload a new Shockwave Flash file, click the **Browse** button (it may be named differently in different web browsers), and choose the desired file. The file will be uploaded when you create or save your material.

4.5.2.4   Web Content - HTML Properties

NOTE   The HTML properties are only shown if the web content **Format** field has been set to: *HTML code (advanced)*.

111

Template Code: The HTML code to display. Smarty template functions can be used here.

Use the **Template Code** field to enter raw HTML code. The HTML code is processed through the *Smarty Template processor*.

You may also insert existing content items by selecting the desired item from the *Insert content item* dropdown, located below the **Template Code** field. HTML for selected item will be inserted at the current caret position.

Preview: Displays a preview of the advertisement.

The **Preview** is updated as you modify the contents of the **Template Code** field.

4.5.2.5   Web Content – Image Properties

NOTE   The image properties are only shown if the web content **Format** field has been set to: *Image advertisement*.

Hyperlink: The click-through URL to which the advertisement is linked.

Use the **Hyperlink** field to configure a click-through hyperlink (URL) for this advertisement. If a user clicks on the image, a new browser window or tab will be opened showing the page at the specified URL.

Leave this field blank if you do not wish to associate a click-through URL with this advertisement.

Image: Select an image that has already been added to the Content Manager or choose to upload a new file.

Image:	advertising-campaigns-blue.png ▲▼
	Select an image file for the advertisement.

The **Image** field contains a list of image files that have been uploaded to the Content Manager. If you need to upload a new image file, select the *Upload a new image* option from the **Image** field.

Size Limit: Displays the maximum file size that can be uploaded.

Size Limit:	⚠ Maximum file upload size: 5.0 MB

New Image: Upload a new image file from your computer.

New Image:	_____ Browse...
	Upload a new image from your computer.

NOTE   The **New Image** field is only shown if the **Image** field has been set to: *Upload a new image*.

To upload a new image file, click the **Browse** button (it may be named differently in different web browsers), and choose the desired file. The file will be uploaded when you create or save your material.

Title: Specify an alternative title for this image.

Title:	_____
	Title of the image. This will be displayed as the alternative text for the advertisement.

The **Title** is shown as a tooltip whenever a user hovers their mouse pointer over the image.

Preview: Displays a preview of the advertisement.

If an image that has already been uploaded is selected, the **Preview** field will show the advertisement. The **Preview** is updated as you modify the properties of the advertisement.

4.5.2.6   Web Content – Text Properties

The text properties are only shown if the web content **Format** field has been set to: *Text advertisement*.

Hyperlink: The click-through URL to which the advertisement is linked.

Hyperlink:	http://www.catwalkfashion.com/sales/
	The URL to which the advertisement is linked.

Use the **Hyperlink** field to configure a click-through hyperlink (URL) for this advertisement. If a user clicks on the **Title** or **Footer**, a new browser window or tab will be opened showing the page at the specified URL.

Leave this field blank if you do not wish to associate a click-through URL with this advertisement.

Title: The main title of the text advertisement.

Title:	20% Off Sale – Catwalk Fashion
	Main title of the advertisement.

The **Title** is shown as the first line of a text advertisement. If a **Hyperlink** has been specified, the title will be clickable.

Body: The content of the text advertisement.

Body:	Walk into Catwalk Fashion for 20% off all items in the store. Hurry, sale ends soon!
	Text content of the advertisement.

The **Body** contains a sentence or two of plain text.

Footer: The footer or tag-line of the text advertisement.

Footer:	catwalkfashion.com/sales
	Tag line or footer of the advertisement. A web site name or brief URL is recommended.

The **Footer** is shown as the last line of a text advertisement. If a **Hyperlink** has been specified, the footer will be clickable.

> **✓ BEST PRACTICE**
>
> A web-site host name or brief URL is recommended for the **Footer**:
> - *www.example.com*
> - *www.example.com/sales*

Preview: Displays a preview of the advertisement.

The **Preview** is updated as you modify the properties of the advertisement.

4.5.2.7   Web Content - YouTube Properties

NOTE   The YouTube properties are only shown if the web content **Format** field has been set to: *YouTube video advertisement*.

NOTE   As the playback of YouTube videos requires a Flash player plugin, some users may not be able to view a YouTube video. Even though the iPhone does not support Flash, it does support YouTube videos.

NOTE   If you want to deliver YouTube advertisements, you need to ensure that your firewall allows the access to the appropriate YouTube video resources.

Video ID: The YouTube video identifier for the video you want to show.

The YouTube **Video ID** is the unique identifier for a video that has previously been uploaded to YouTube.

For example, given the URL:

http://www.youtube.com/watch?v=Y7dpJ0oseIA&feature=related

The **Video ID** is *Y7dpJ0oseIA*. That is, the component of the URL between the *'v='* and the *'&'.*

Width: The width of your video (in pixels)

Enter the desired *width* (in pixels) for your video into the **Width** field.

Height: The height of your video (in pixels)

Enter the desired *height* (in pixels) for your video into the **Height** field.

Preview: Displays a preview of the advertisement.

The **Preview** is updated as you modify the properties of the advertisement.

4.5.2.8   SMS Material

NOTE   The **SMS Content** section is only shown if the **Type** field is set to: *SMS content*.

The **SMS Content** section allows you to configure the **text** of your SMS advertisement.

Text: The text of the SMS advertisement.

Use this field to enter the text of your SMS advertisement.

✔ **BEST PRACTICE**
Keep your message short, less than 80 characters, as an SMS advertisement is *appended* to a SMS registration receipt, which will consume much of the 160 available octets (some carriers may allow as little as 128 octets).

4.5.2.9   Creating and Saving

When you are satisfied that you have the correct settings, if you are creating a new advertising material:

- Click the 🟢 **Create** button to create your advertising material and return to the materials list.

- Click the 🟢 **Create and Reload** button to create your advertising material and reload the material editor.

If you are saving changes to a preexisting advertising material:

- Click the 🖫 **Save** button to save your advertising material and return to the materials list.

- Click the 🖫 **Save and Reload** button to save your advertising material and reload the material editor.

4.6   Reports

The Advertising Services plugin provides simplified reporting with which you can analyze various metrics of your system, access the data that it gathers, and look at those metrics and data with reference to various demographic groups.

4.6.1   Reports List

The reports list (Advertising Services » Reports) provides a list of the preset reports. Reports can be opened and executed.

Each of the items in the reports list represents a single preset report. You may open and then execute a preset report.

To open a preset report, click on the relevant item in the materials list. An *action row* will be shown containing an 📝 **Open** link that you may click.

4.6.2   Report Editor

With the report editor, you are able to open a preset report, which can be used as a starting point for delving into your data.

4.6.2.1   *Show the report options*

When you first open a report, the report options are hidden so that the full chart or table can be easily seen.

If you wish to modify the report options, click the ⬇ **Show the report options** link.

4.6.2.2   *General Properties*

The **General Properties** section allows you to select what **report type** will be output.

Report Type: Select the type of report to be generated.
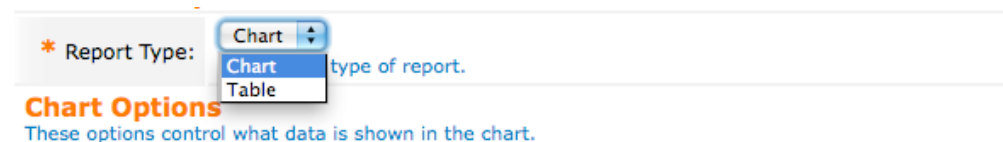
The **Report Type** field supports the following options:

Table 25: Options for the Report Type field

Option	Description
Chart	Select this option if you want to generate a chart report.
Table	Select this option if you want to generate a table report.

4.6.2.3 Table Options

NOTE The **Table Options** section is only shown if the **Report Type** field is set to: *Table*.

The **Table Options** section allows you to control which data is shown in the table. You can change the **maximum rows** to output and the **properties** to report on.

Maximum Rows: Limit the number of rows returned by the report.

Maximum Rows: [   ] rows
Enter the maximum number of rows to return in the report or leave empty to return all rows.

To ensure that your report does not become too long for your browser to view, you can limit the number of rows that are returned by entering a number in the **Maximum Rows** field.

If you want all rows to be returned, leave this field blank.

Properties: The list of properties and any associated statistics that are to be presented in the report.

Properties:

Property	Statistic
No properties have been added to the table.	
Add a property	

Use this list to edit the properties to be included in the table report.

The **Properties** that you have in this list will be the *columns* of your report. For each property, you can output raw values, or calculate a statistic.

To add a new property when the **Properties** list is empty, click the **Add a property** link, and then choose the desired property from the **Property** column dropdown.

If the list already has properties in it, clicking on a row will show an *action row* with a number of commands that can be executed for that row:

- **Remove** – remove the property from the list of properties to report on

- ⬆ **Move up** – position the row higher in the list; the topmost property will be the leftmost column output to the report.

- ⬇ **Move down** – position the row lower in the list; the bottommost property will be the rightmost column output to the report.

- **Insert before** – insert a row before this row so that another property can be added

- **Insert after** – insert a row after this row so that another property can be added
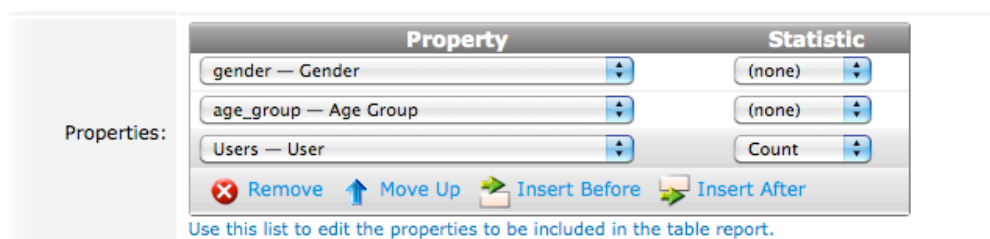
The property selected in any row can be changed by clicking the associated dropdown, and then choosing an alternative property.

The statistic to be calculated for a property can be changed by clicking the associated dropdown and choosing an alternative statistic (or *none* to output the raw values).

The **Statistic** column dropdown supports the following options:

Table 26: Options for the Statistic field

Option	Description
(none)	Select this option to output the raw values for the associated property.
Count	Select this option to count the number of instances of the associated property.
Sum	Select this option (for numerical properties) to calculate to *sum* of the values of the associated property.
Average	Select this option (for numerical properties) to calculate to *average* of the values of the associated property.
Maximum	Select this option (for numerical properties) to calculate to *maximum* of the values of the associated property.
Minimum	Select this option (for numerical properties) to calculate to *minimum* of the values of the associated property.

If your report contains some properties for which a statistic will be calculated, then the population for each statistic will determined by grouping the underlying values using the *raw* properties (non-statistical properties).

For example, if you were to specify a report with the following properties (and statistics):

- Gender – raw values (no statistic)

- Age group – raw values (no statistic)

- Impressions – Count statistic

Then the report that will be output will have the three columns: Gender, Age Group and Impressions (Count). There will be a row for each combination of gender and age group for which there has been at least one impression delivered. The count of impressions in a row will be the number of impressions delivered to users with the corresponding gender and age group.

4.6.2.4   *Chart Options*

NOTE The **Chart Options** section is only shown if the **Report Type** field is set to *Chart*.

The **Chart Options** section allows you to control which data is shown in the chart. You can change the **primary** property (vertical axis) and whether to calculate a **statistic** for the primary property, the **secondary** property (horizontal axis), and the **tertiary** property (vertical grouping).

Primary: Choose the primary property to report on.

Use this field to select which property to show on the vertical axis of your report. If set to *default*, the system will choose one for you.

Primary Statistic: Choose the statistic to calculate on the primary property.

Use this field to specify a statistic to calculate for the vertical axis. If set to *default*, the system will choose a statistic for you.

The **Primary Statistic** field supports the following options:

Table 27: Options for the Primary Statistic field

Option	Description
(default)	Select this option to have the system choose a statistic for you.
Count	Select this option to count the number of instances of the primary property.
Sum	Select this option (for numerical properties) to calculate to *sum* of the values of the primary property.
Average	Select this option (for numerical properties) to calculate to *average* of the values of the primary property.
Maximum	Select this option (for numerical properties) to calculate to *maximum* of the values of the primary property.
Minimum	Select this option (for numerical properties) to calculate to *minimum* of the values of the primary property.

Secondary: Choose the secondary property to report on.

Secondary: age_group — Age Group
Choose the secondary property to report on.

Use this field to select a property for the horizontal axis. Typically, this would be a date or numerical property.

The system will automatically generate a number of horizontal groups based on the range of the secondary property. For example, if *Session Start Time* was selected, and the range of those values covered a *month*, the system would group data on a *daily* basis.

Tertiary: Choose the tertiary property to report on.

Tertiary: gender — Gender
Choose the tertiary property to report on.

Use this field to select a grouping property. If a property is selected, a *stacked bar chart* will be output.

If the **Tertiary** field is set to *none,* then a simple *bar chart* will be output.

NOTE   If you do not select a secondary property, the tertiary will be *promoted* to the secondary level.

4.6.2.5   Filter Options

The **Filter Options** section allows you refine the data used in the report.

Filter: Add and edit a list of filters to refine the data that
                                     the report is based on.

To add a filter to a report:

1. Click the ▽ **Add Filter** tab link; a form will be shown.

2. Select the property to filter from the dropdown.

3. Click the ▽ **Add Filter** submit button; a filter for the property will
    be added to the **Filters** list and an editor for the filter will be
    shown.

NOTE   The updated filter settings will be applied to the chart when you next click the
            ▸▸ **Preview Report** button.

Existing filters can be edited or deleted. Clicking on a row will show an *action
row* with a number of commands that can be executed for that row:

- ▪   📝 **Edit** – edit the filter settings

- ▪   ❌ **Delete** – delete the filter

To edit an existing filter:

1. Click the filter; an action row will be shown.

2. Click the ⬛ **Edit** link; a filter editor will be shown.

3. Make changes to the filter settings as necessary.

4. Click the 💾 **Save Changes** button.

NOTE   The updated filter settings will be applied to the chart when you next click the ⏩ **Preview Report** button.

To delete an existing filter:

1. Click the filter; an action row will be shown.

2. Click the ❌ **Delete** link; a confirmation dialog will be shown.

3. Click the **OK** button; the filter will be removed from the list.

NOTE   The updated filter settings will be applied to the chart when you next click the
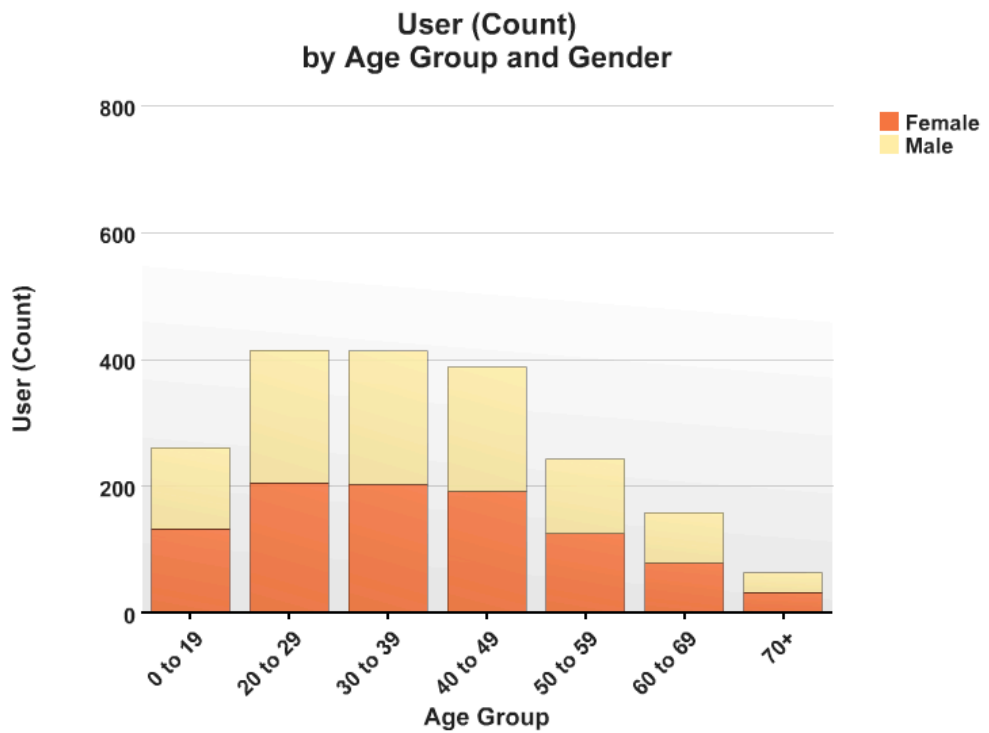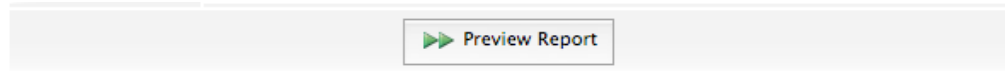▶▶ **Preview Report** button.

4.6.2.6   Report Preview

When you are satisfied that you have the correct settings, click the
▶▶ **Preview Report** button.

▶▶ Preview Report

User (Count)
by Age Group and Gender

5   Gathering User Information

The **amigopod Visitor Management Appliance** is able to gather user information when users (guests) register for access to the network. It is able to do this through the registration forms that it provides.

Guest Self-Registration forms can be customized to include additional fields, which can be either factory preset fields or custom fields that are created and configured by a system administrator.

The scope of this document covers the deployment of Advertising Services. As such, details regarding the customization of guest self-registration forms are limited to a small number of examples on how to gather demographic information (§3.2), and to defining the types of custom fields that can be used for the **intelligent delivery** of advertisements (§5.2).

NOTE   For complete details regarding customization of the Guest Self-Registration forms, refer to the **amigopod Deployment Guide** (§1.2).

5.1   Demographic & non-demographic user information

An important concept to understand pertains to the difference between various types of information. Certain types of information can be used to infer that a person belongs to one *group* or another. Where as other types of information do not infer membership to a group.

A number of examples will help to illustrate this point. Let's say that a user registers with an amigopod to gain access to the network. On the registration form, there are a number of fields, including:

- Name

- Postcode / ZIP code

- Mobile phone number

- Email address

- Gender

- Age group

- Personal interests (fashion, music, …, reading)

Of these fields, the following do **not** (directly) place a user into a **group**:

- **Name** – there are an unlimited number of names that could be provided as a response to a name field, and so a name does not (directly) place a person into a group.

- **Postcode / ZIP code** – there are a large number of possible responses to a request for a postcode or ZIP code, so again, such a field does not (directly) place a person into a group.

- **Mobile phone number** – there are many millions of valid mobile phone numbers that could be provided by a user, therefore a phone number also does not place a person into a group.

- **Email address** – as with phone numbers, there are many millions of possible email addresses that could be provided by a user, so an email address also does not place a person into a group.

Of the above fields, however, there are some that **do** place people directly into **groups**:

- **Gender** – there are only two responses for gender: female or male. A person who selects one of these two options can therefore be placed into the corresponding group: the *female group* or the *male group*.

- **Age group** – there are typically a small number of possible response for an age group question. Using the definition of an age_group field covered in this manual (§3.2.2) there are only 7 valid responses. A person who selects one of the 7 responses can therefore be placed into the corresponding group. For example, the *0-to-19 group* or the *30-to-39 group*.

- **Personal interests** – for each of the personal interests (fashion, reading, …, reading) only a yes or no response is valid. The user can respond *Yes, I am interested in fashion*, or *No, I am not interested in fashion*. Their response can place them in the *Fashion-Yes group* or the *Fashion-No group* (and likewise for each of the other *personal interest* options).

As you can see, there are some types of information that can place a person directly into a group, and there are other types that cannot.

When a person is placed into a **group** (based on their responses to the fields in a registration form), they can be said to belong to a particular **demographic**. The demographics that would be possible, using the above fields as examples, would include:

Table 28: Example Demographics Groups

Gender	Age		Personal Interests	
Male	0 to 19	20 to 29	Entertainment Yes	Entertainment No
Female	30 to 39	40 to 49	Fashion Yes	Fashion No
	50 to 59	60 to 69	Food Yes	Food No
	70+		Homewares Yes	Homewares No
			Jewelry Yes	Jewelry No
			Music Yes	Music No
			Reading Yes	Reading No
			Sport Yes	Sport No
			Technology Yes	Technology No

When you gather **demographic** information, that is information that can directly place a person into a group, then you are able to use that information to provide personalized advertising.

5.2 Custom fields & intelligent delivery of advertising

User information can only be used for **intelligent delivery** if the information places the user directly into a group. For example, a user's gender or age group places that user into a group, but their phone number or email address does not.

NOTE For a detailed discussion of this, refer to the previous section on demographic and non-demographic information (§5.1).

Certain types of form fields allow users to select a single choice from a small list of available options. These types of fields are:

- **Checkboxes** – A user can choose to tick the checkbox or not tick it. That is, they must be in one of two possible groups.

- **Checklists** – A user is presented with a (typically small) number of checkboxes. For each checkbox, they can choose to tick or not tick the box. Each choice places them in one of the two possible groups.

- **Radio buttons** – A user is presented with a (typically small) number of mutually exclusive options. They can choose only one of the options. They are placed into the group corresponding to their selection.

- **Dropdown** – As with radio buttons, a user is presented with a (typically small) number of mutually exclusive options. They can choose only one of the options. They are placed into the group corresponding to their selection.

Only the above types of form fields (checkboxes, checklists, radio buttons and dropdown lists) can be used to gather information for **intelligent delivery**. Other field types, such as text fields, can be used to gather important user information, but they cannot be used to influence the delivery of advertising.

5.3 Reporting on user information

The Advertising Services plugin provides a simple reporting interface (§4.6) through which you can access the information that your system has collected.

For example, assuming that you have customized your guest registration forms to gather gender and age group information, you can produce a chart that shows the breakdown of your users by gender and age group by creating a chart with:

- The **Primary** dropdown set to: *Users – User*

- The **Primary Statistic** dropdown set to: *Count*

- The **Secondary** dropdown set to: *gender – Gender*

- The **Tertiary** dropdown set to: *age_group – Age Group*

By creating charts and tables with different mixes of properties, you can analyze different metrics with reference to various user demographics.

NOTE   For further details on how to use the reporting features of Advertising Services, refer to section 4.6.