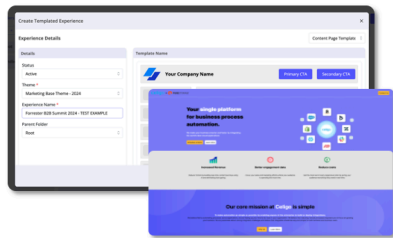


# Guide to Using Segment Rules for Dynamic Personalization in PathFactory Content Experiences

PathFactory Dynamic Personalization is a key feature that enables marketers to create and use just one template that **dynamically personalizes section copy, logos, and images in real time based on visitor identity**. First you build audience cohorts in PathFactory Segments—and then use them in **Segment Rules** to activate scalable, automated ABM and personalization of a digital experience. This feature is available for use in Templated Experiences and Content Playlists to help you customize content experiences for every visitor, based on account identification from 6Sense, Demandbase, or custom query parameters.

## Easily Build On-Brand Experiences That Engage and Convert



Build any type of landing page, site, or hub with the easy experience builders in our new UX

## Create a Single ABM Template and Scale It Endlessly



Use custom field merges and segment rules to automate personalization of copy, logos and images

## Example of Using Segment Rules & Custom Field Merges

The following example demonstrates what Segment Rules and Custom Field Merges you would use to detect a visitor's industry and present relevant content assets.

### Objective

Tailor content for visitors from the tech industry.

### Segment Rules

Criteria - Visitor identified as Tech Industry by 6sense or Demandbase

Action - Add Custom Field Merges `{{custom.TechHeader}}`, `{{custom.TechImage}}`

**Note:** You do not have to be a 6sense or Demandbase customer to use dynamic personalization.

## Custom Field Merge Definitions

Add to Header -

{{custom.TechHeader}} - This Custom Field Merge displays "Welcome, Tech Professionals!"

{{custom.TechImage}} - This Custom Field Merge displays an image relevant to technology advancements

**Note:** If you're new to the concept of Segments, we recommend you read the article, [Introduction to Segments](#) before proceeding further with the setup instructions in this article.

## Dynamic Personalization Setup

To start using PathFactory Dynamic Personalization, you first need to create Segment Rules. These rules set specific criteria for identifying visitor attributes, such as industry, vertical, geographic location, etc.

Alongside these rules, you will define Custom Field Merges, which are dynamic placeholders that modify content elements like headers, text, images, and CTAs based on visitor data provided by your chosen intent platform (6Sense or Demandbase) or using custom query parameters.

These are the steps we'll walk you through in this tutorial so you can start using this feature:

1. Identify your audience segments.
2. Download the Segment Rules Template from PathFactory.
3. Fill out the Segment Rules Template.
4. Upload the modified CSV file for your template to PathFactory.
5. Design your Experience (i.e., Landing Page, Content Page, or Content Playlist).
6. Add Dynamic Personalization to your experience.
7. Preview your Experience.
8. Activate your Experience.

## Step 1: Identify the Audience Segments

Begin by pinpointing the precise audience segments you aim to target with your marketing program. This involves defining the specific characteristics and behaviors that distinguish each segment. Consider factors like demographics, firmographics, purchase history, and engagement level to form a detailed profile of each group.


Once you have clearly defined these segments, you will need to create corresponding Segment Rules in PathFactory. These rules should accurately reflect the characteristics of your target accounts or groups. By setting up these rules, you can ensure that your marketing content and messaging is tailored specifically to the needs and interests of each segment.

For detailed information on how to create and configure segments, refer to [How to Create, Edit, or Delete a Segment](#).

## Step 2: Download the Segment Rules Template from PathFactory

After you have defined the audience segments, follow the instructions below to download the PathFactory Segment Rules Template and fill it in with your Segment Rules and Custom Field Merges.

1. On the upper right corner of your PathFactory application, click on the gear icon. In the menu that drops down, select **Personalization**.

Library   Tanya

**All Assets (111)** **Uploaded Assets**

**General** **User Experience** **Data Configurations** **Classic Experiences** **Virtual Events**

Image Library Appearances Webhooks Track Labels Widgets

External Code Languages Visitor Activities

Access Protection Links & Sharing

Content Tags Form Library

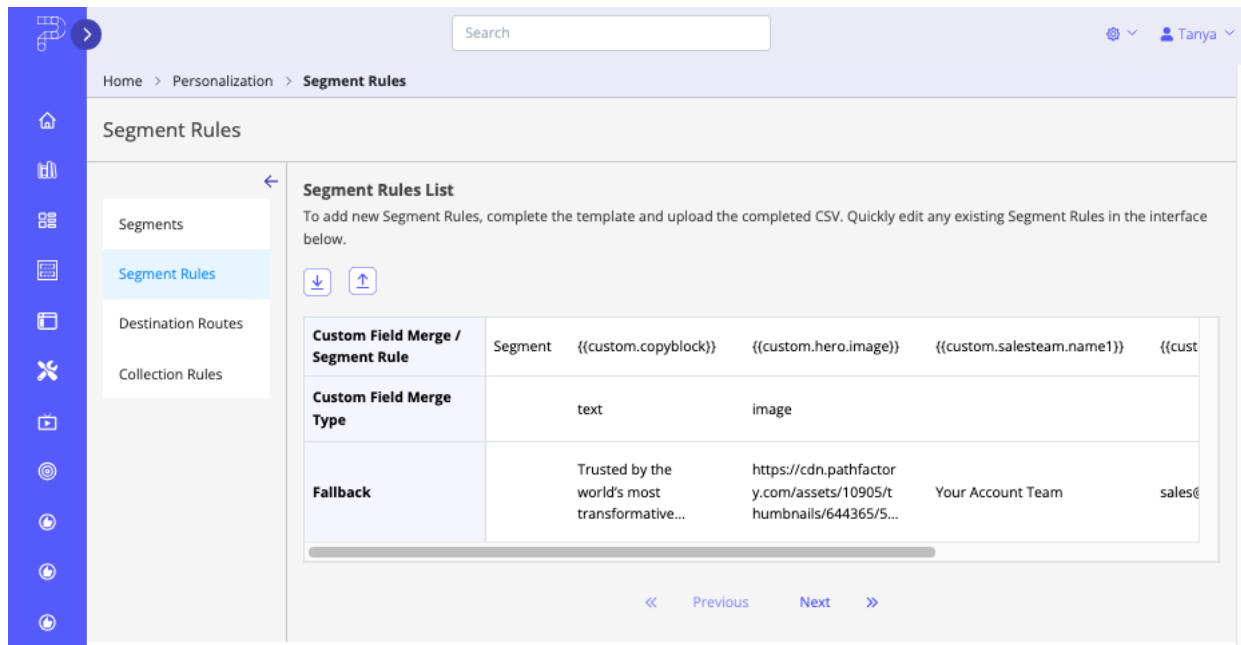
**Personalization** CTAs

Themes

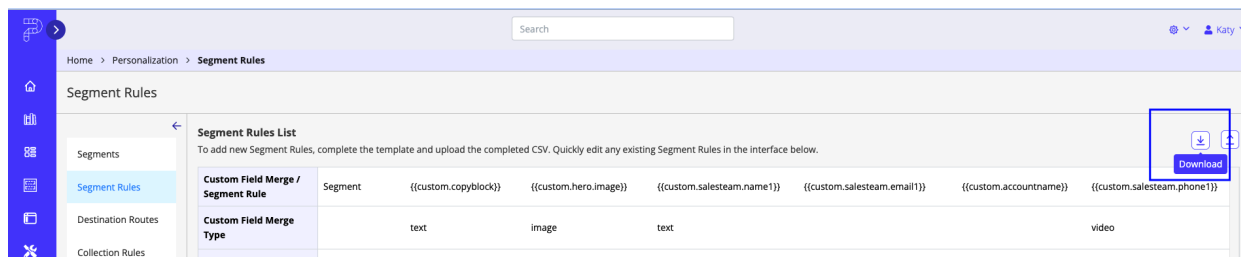
<input type="checkbox"/>	Name	Created By
<input type="checkbox"/>	Nook Home Pa	ya
<input type="checkbox"/>	5 Ways To Be A	ya
<input type="checkbox"/>	Testing Loom v	BC
<input type="checkbox"/>	Product Scan Overview 1 Pager	File Upload 2024-05-03 7:01 pm 2024-05-03 7:02 pm TimBC
<input type="checkbox"/>	Forrester Report: Artificial Intelligence Technologies And Solutions	Website URLs 2022-03-16 11:04 am 2024-05-03 6:09 pm TimBC
<input type="checkbox"/>	Locking in predictable revenue: Gong takes Piano's forecast accuracy to 90%	Website URLs 2024-04-22 2:24 pm 2024-04-22 2:25 pm TimBC
<input type="checkbox"/>	Use Cases For Path Factory Data In Marketo	File Upload 2024-03-22 11:41 am 2024-03-22 11:43 am jennasmith
<input type="checkbox"/>	Vision Scale Total Economic Impact (TEI) ROI Calculator	Website URLs 2023-09-28 10:34 am 2024-03-19 10:06 pm jennasmith
<input type="checkbox"/>	Martechify Total Experience: Connecting Online and Offline Channels	Website URLs 2024-03-18 5:36 pm 2024-03-18 5:37 pm TimBC

<< Previous 1 2 3 Next >> 50 per page

2. On the **Personalization** menu that opens, on the left side click **Segment Rules**.



- Next, download the **Segment Rules Template** by clicking the down arrow icon, as highlighted in the screen capture below. This will download a copy of the file onto your computer.



- The Segment Rules Template facilitates asynchronous collaboration among stakeholders involved in executing your campaigns and personalization rules. By sharing the template on a shared drive, teams and cross-functional groups can access and contribute to the segment rules simultaneously, ensuring streamlined and efficient marketing coordination.

	A	B	C
1	Custom Field Merge/Segment Rule	Segment	{{custom.copyblock}}
2	Custom Field Merge Type		text
3	Fallback		Trusted by the world's most innovative brands
4	Dunder Mifflin 1:1 Q2 2024	Dunder Mifflin Paper Company Inc.	Trusted by the world's most transformative paper c
5	Los Pollos Hermanos 1:1 Q2 2024	Los Pollos Hermanos	Trusted by the world's most transformative fast food dat
6	Duff Beer 1:1 Q2 2024	Duff Beer	Trusted by the world's most transformative food and dat

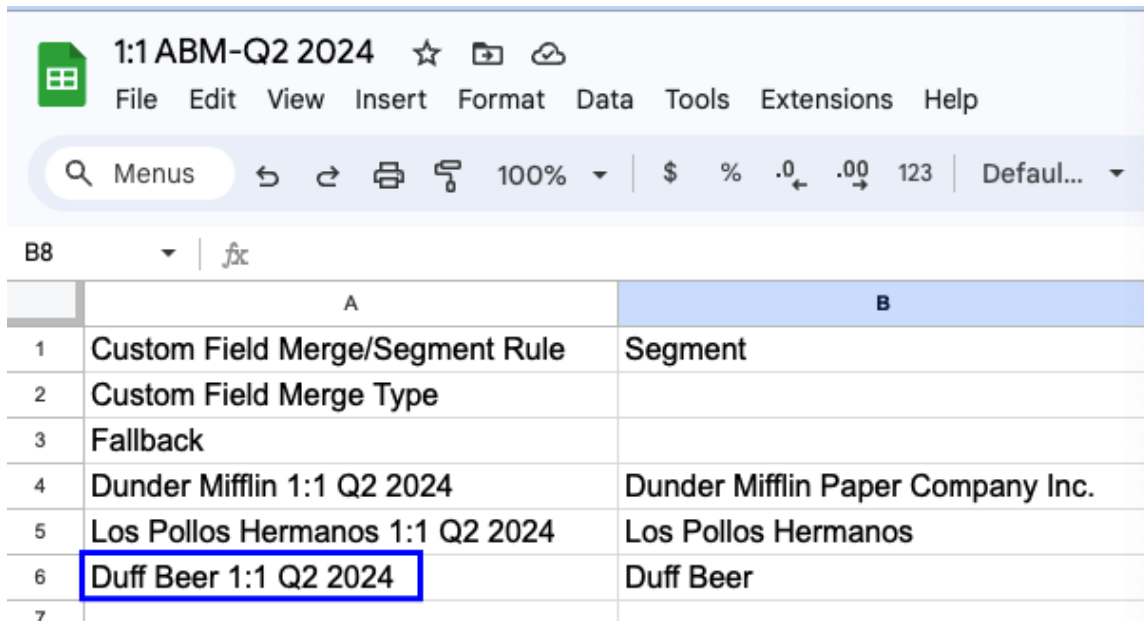
## Step 3: Fill Out the Segment Rules Template

Below are descriptions of each of the fields you'll find in the Segment Rules Template. You'll need to fill out the variations you want in these fields for each of your segments.

### Custom Field Merge Type (Text, Image or Video)

Use this to define the field merge type as Text, Image or Video, so that content personalization variations display properly within the Templated Experience or Content Playlist.

Below is a screen capture of an example where we are setting up rules that create multiple personalized 1:1 pages for key accounts using a single template and defined Segment Rules.



	A	B
1	Custom Field Merge/Segment Rule	Segment
2	Custom Field Merge Type	
3	Fallback	
4	Dunder Mifflin 1:1 Q2 2024	Dunder Mifflin Paper Company Inc.
5	Los Pollos Hermanos 1:1 Q2 2024	Los Pollos Hermanos
6	Duff Beer 1:1 Q2 2024	Duff Beer
7		

## Fallback

In this field, make sure you define a default Templated Experience for visitors who are not recognized by your intent platform. We call this a “fallback” experience that can be shown to unknown visitors who cannot be matched to an account or other firmographic data.

## Segment Rule

In this field, enter the name for the segment and the name for the marketing program. Naming is important when managing multiple programs simultaneously.

For example, you may want to create a 1:1 ABM program for Account A for Product X in Q2. In Q4, you may want to build a different 1:1 ABM program for the same Account A, but for Product Y that requires different Segment Rules and Custom Field Merges to drive the desired personalization.

Make sure you are using Segment Rule names that apply naming conventions that make it easy find, manage and track multiple Segment Rule names in a list over time. For the example scenario above, this might look like "Account A - Product X Q2 2024 ABM Program" for the first one and "Account A - Product Y Q4 2024 ABM Program" for the second

## Segment

Enter the names of the Segments in this field that you defined and created in [Step 1](#).

**Important!** Verify that each segment named in the Segment Rules Template already exists within PathFactory to prevent errors.

## Custom Field Merges

Custom Field Merges are basically dynamic content fields that automatically populate your experiences with personalized content based on a visitor's unique profile or behavior and how that aligns to your Segment Rules.

Using Segment Rules and Custom Field Merges in combination bring personalization at scale to life within your PathFactory experiences. Custom field merges change images, logos, contact info, or copy blocks dynamically based on the rules you specify in your Segment Rules Template.

All Custom Field Merge names you use must start with the prefix "custom" to clearly distinguish them from field merges for 6Sense or Demandbase. Here are two examples of Custom Merge Fields and their effects:

`{{custom.HealthcareHeader}}` = "Welcome, Healthcare Professionals!"

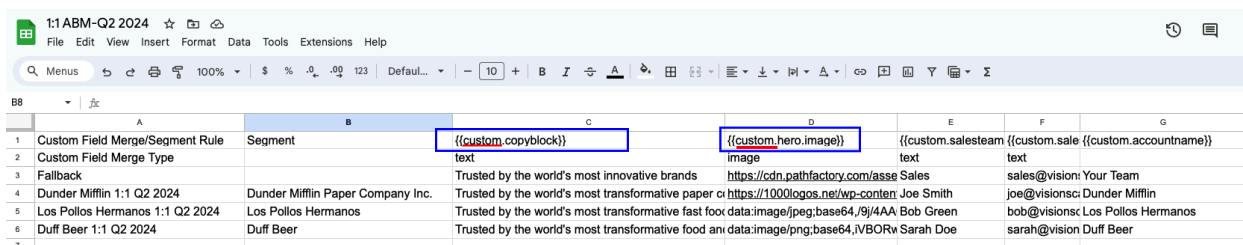
`{{custom.HealthcareImage}}` = Link to a relevant healthcare image

When creating Custom Field Merges for different campaigns, it's crucial to use unique names to avoid confusion and ensure correct usage. For example:

`{{custom.copyblockQ2}}` for a Q2 1:1 ABM program

`{{custom.copyblockQ4}}` for a Q4 1:1 ABM program

Align your Custom Field Merge definitions with their associated Segment Rules to maintain an organized template. Below is an example showing two custom field merges – one to add a custom copy block in and another to personalize what hero image will appear on a landing page based on what account and visitor is engaging with the experience.



	A	B	C	D	E	F	G
1	Custom Field Merge/Segment Rule	Segment	<code>{{custom.copyblock}}</code>	<code>{{custom.hero.image}}</code>	<code>{{custom.salesteam}}</code>	<code>{{custom.sale}}</code>	<code>{{custom.accountname}}</code>
2	Custom Field Merge Type		text	image	text	text	
3	Fallback		Trusted by the world's most innovative brands	<a href="https://cdn.pathfactory.com/assets/1000logos.net/wp-content/uploads/2022/04/1000Logos-Net-Logo.png">https://cdn.pathfactory.com/assets/1000logos.net/wp-content/uploads/2022/04/1000Logos-Net-Logo.png</a>	Sales	sales@vision: Your Team	
4	Dunder Mifflin 1:1 Q2 2024	Dunder Mifflin Paper Company Inc.	Trusted by the world's most transformative paper companies	<a href="https://1000logos.net/wp-content/uploads/2022/04/1000Logos-Net-Logo.png">https://1000logos.net/wp-content/uploads/2022/04/1000Logos-Net-Logo.png</a>	Joe Smith	joe@visionsc: Dunder Mifflin	
5	Los Pollos Hermanos 1:1 Q2 2024	Los Pollos Hermanos	Trusted by the world's most transformative fast food restaurants	<a href="https://1000logos.net/wp-content/uploads/2022/04/1000Logos-Net-Logo.png">https://1000logos.net/wp-content/uploads/2022/04/1000Logos-Net-Logo.png</a>	Bob Green	bob@visionsc: Los Pollos Hermanos	
6	Duff Beer 1:1 Q2 2024	Duff Beer	Trusted by the world's most transformative food and beverage brands	<a href="https://1000logos.net/wp-content/uploads/2022/04/1000Logos-Net-Logo.png">https://1000logos.net/wp-content/uploads/2022/04/1000Logos-Net-Logo.png</a>	Sarah Doe	sarah@vision: Duff Beer	
7							



Once you've finished building your Segment Rules in your Segment Rules Template, upload the file as a CSV back into PathFactory. To do this, follow these steps.

1. Click the upload icon as highlighted in the screen capture below.

Home > Personalization > Segment Rules

Segment Rules

Segments

Segment Rules

Destination Routes

Collection Rules

Segment Rules List

To add new Segment Rules, complete the template and upload the completed CSV. Quickly edit any existing Segment Rules in the interface below.

Download

Upload

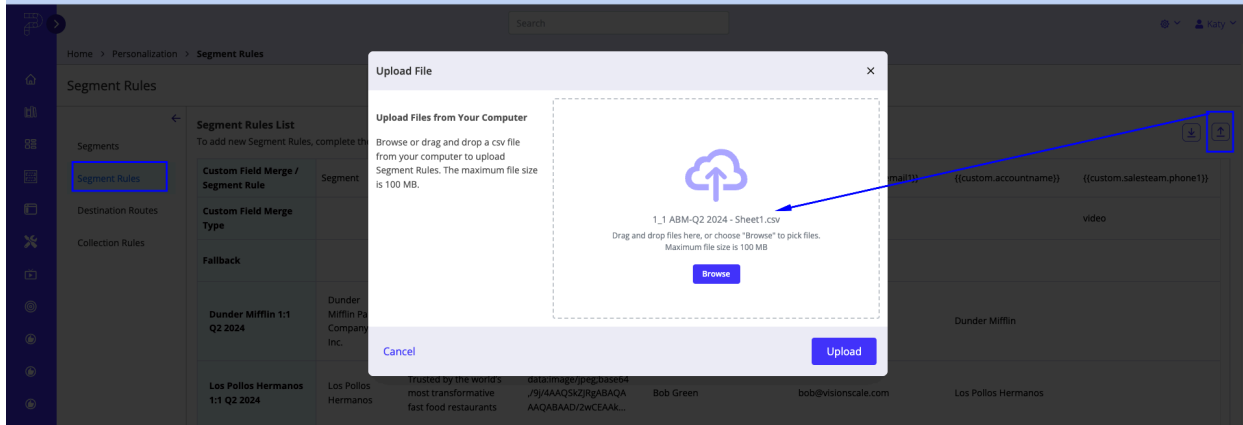
Custom Field Merge / Segment Rule	Segment	{{custom.copyblock}}	{{custom.hero.image}}	{{custom.salesteam.name1}}	{{custom.salesteam.email1}}	{{custom.salesteam.phone1}}
Custom Field Merge Type		text	image	text	text	text
Fallback		Trusted by the world's most innovative brands	https://cdn.pathfactor.com/assets/10905/logos/645303/059194...	Sales	sales@visionscale.com	Your Te
Dunder Mifflin 1:1 Q2 2024	Dunder Mifflin Paper Company Inc.	Trusted by the world's most transformative...	https://1000logos.net/wp-content/uploads/2024/02/Dunder-Miffl...	Joe Smith	joe@visionscale.com	Dunder
Los Pollos Hermanos 1:1 Q2 2024	Los Pollos Hermanos	Trusted by the world's most transformative fast...	data:image/jpeg;base64,9j/4AAQSkZJRgABAQAAQABAAQ/2wC...	Bob Green	bob@visionscale.com	Los Pol
Duff Beer 1:1 Q2 2024	Duff Beer, Duff Beer	Trusted by the world's most transformative foo...	data:image/png;base64,iVBORw0KGgoAAAANSUHEuGAAAMwAA...	Sarah Doe	sarah@visionscale.com	Duff Be
Healthcare	Industry - Healthcare	Trusted by other Healthcare companies	https://cdn.pathfactor.com/assets/10905/tumbnails/644365/5...	Healthcare Rep	healthcare@visionscale.com	Healthc
IT	Industry - IT	Trusted by other IT companies	https://cdn.pathfactor.com/assets/10905/tumbnails/644365/5...	IT Rep	it@visionscale.com	IT
Education	ABX Demo - Education	Trusted by other Education companies	https://cdn.pathfactor.com/assets/10905/tumbnails/644365/5...	Education Rep	education@visionscale.com	Educati
Automotive	ABX Demo - Automotive	Trusted by other Automotive companies	https://cdn.pathfactor.com/assets/10905/tumbnails/644365/5...	Automotive Rep	automotive@visionscale.com	Automot
InsuranceAUS	ABX Demo - Automotive, ABX Demo - Automotive	Trusted by other InsuranceAUS companies	https://cdn.pathfactor.com/assets/10905/tumbnails/644365/5...	InsuranceAUS Rep	InsuranceAUS@visionscale.com	Cisco

Previous

1

Next

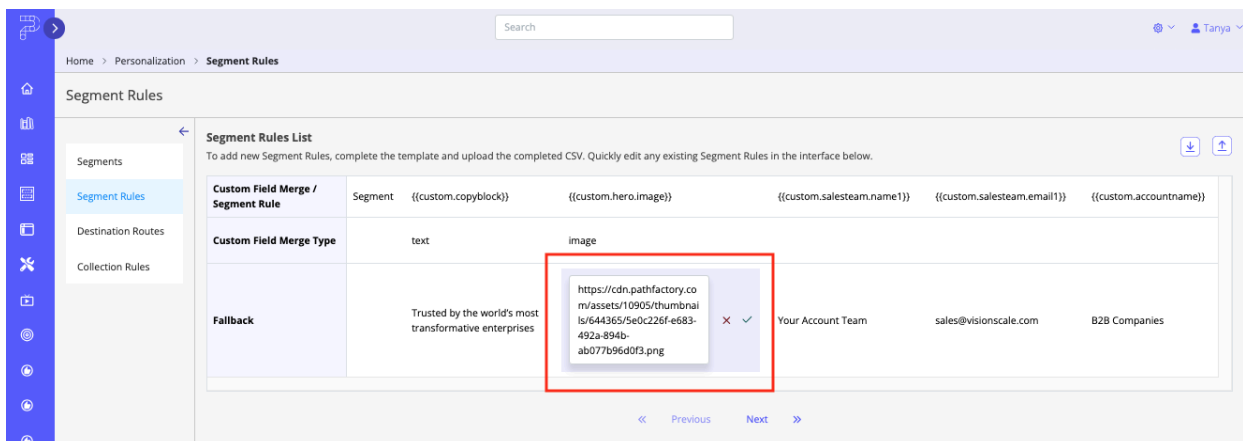
2. At the prompt, click **Browse** and select your Segment Rules Template. Click **Upload**.



- When your Segment Rules are finished processing, you will receive an email to confirm the upload is complete. To see the newly added file on the Segment Rules tab, refresh your browser screen.

**Important! When you upload a CSV file, new Segment Rules are added and any existing rules with the same names are updated/overwritten. Segment Rules will not be automatically deleted during this process. Any rules in the platform already that are not included in the most recently uploaded CSV template will remain unchanged in the system.**

- If you've forgotten to fill out any inputs in the template, or you need to make changes, you can add new Segment Rules or edit individual cells in your template by clicking into them directly on screen right within PathFactory. All of the Segment Rules are editable, as shown in the screen capture below.



## Step 5: Design Your Experience (Page or Content Playlist)

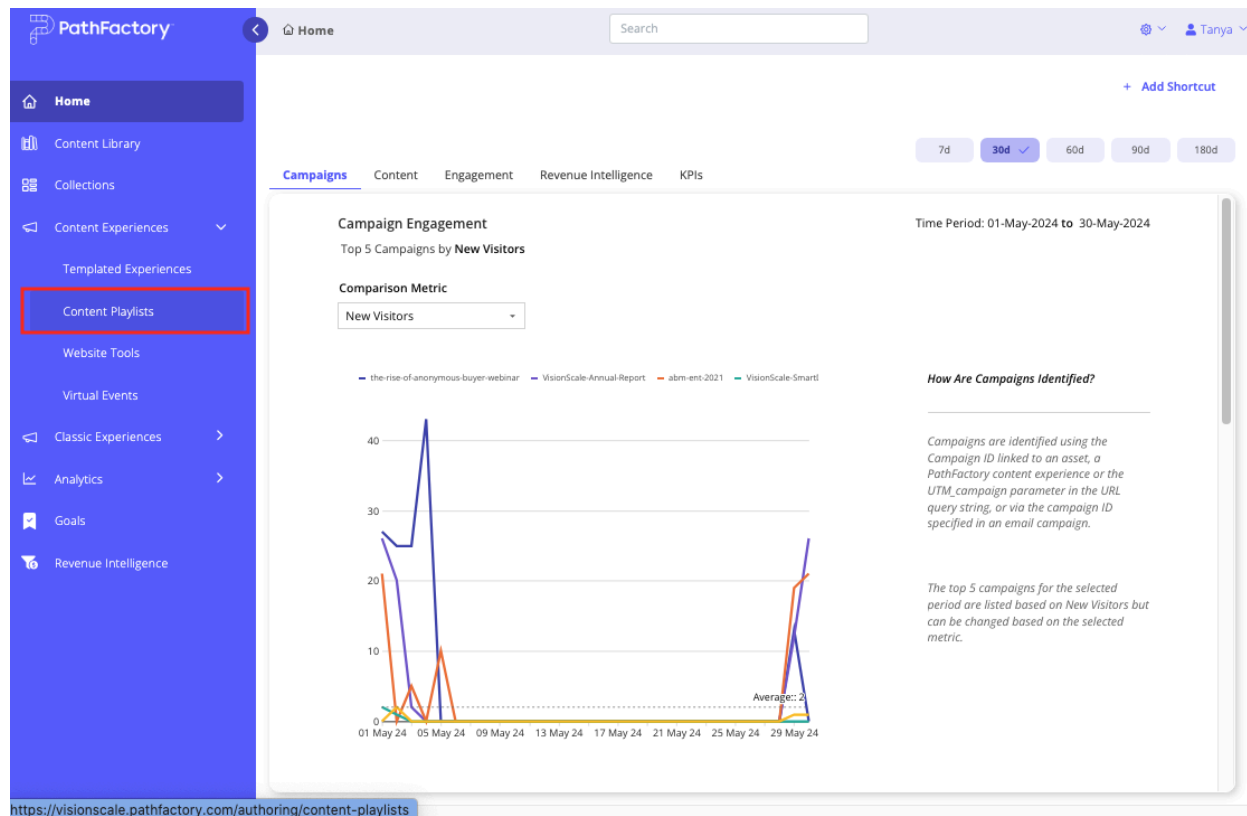
Before you can activate the dynamic personalization variations you set up in Segment Rules, you'll need to create a layout for whatever Experience type you are planning to use - a Templated Experience Landing Page or Content Page Template; or a Content Playlist. Then you'll identify which elements will benefit from adding dynamic personalization - e.g., header logo, hero copy, CTA.

For detailed instructions on how to build a Templated Experience (Landing Pages and Content Pages) or a Content Playlist, read [Introduction to Templated Experiences](#), or [Introduction to Content Playlists](#).

## Step 6: Add Dynamic Personalization to Your Experience

Once you've added your Segment Rules in PathFactory, you need to add the Custom Field Merges to your experience layout. The steps below will guide you through the process of adding Custom Field Merges to a Content Playlist or Page Template.

1. To get started, you'll want to go to the Page Template or Content Playlist in which you want to apply dynamic personalization.
- **If you are doing this for a Content Playlist**, open the side menu panel and select **Content Playlists**.



- In the main list of Content Playlist experiences that that displays, check the box next to the playlist you want to edit and then click the edit icon.

The screenshot displays the 'Content Playlists' management interface. On the left is a sidebar with navigation icons. The main area shows a table of content playlists. The first row, 'Content Playlist April 2024', is selected. The right-hand panel provides configuration details for the selected playlist.

Experience Name	Type	Date Published	Last Updated	Added By	Folder
Content Playlist April 2024	Content Playlist	2024-04-26 2:50 pm	2024-05-30 10:21 am	Tanya	Root
ABC 123	Content Playlist	2024-04-11 4:29 pm	2024-05-21 6:47 pm	Tanya	Root
VisionScale Web Overlay ABM FinServe CP	Content Playlist	2023-12-06 11:19 pm	2024-05-03 6:22 pm	tim_internal	Root
VisionScale Web Overlay CP	Content Playlist	2023-12-06 11:04 pm	2024-05-03 6:17 pm	tim_internal	Root
Linkedin CP	Content Playlist	2023-12-01 5:13 am	2024-05-03 6:01 pm	mohit_shah	Root
Sample Smart Playlist	Content Playlist	2024-04-19 8:17 am	2024-04-26 12:20 pm	carly	Root
No Header CP Test	Content Playlist	2024-04-18 3:05 pm	2024-04-18 3:05 pm	Tanya	Root

**Content Playlist April 2024**

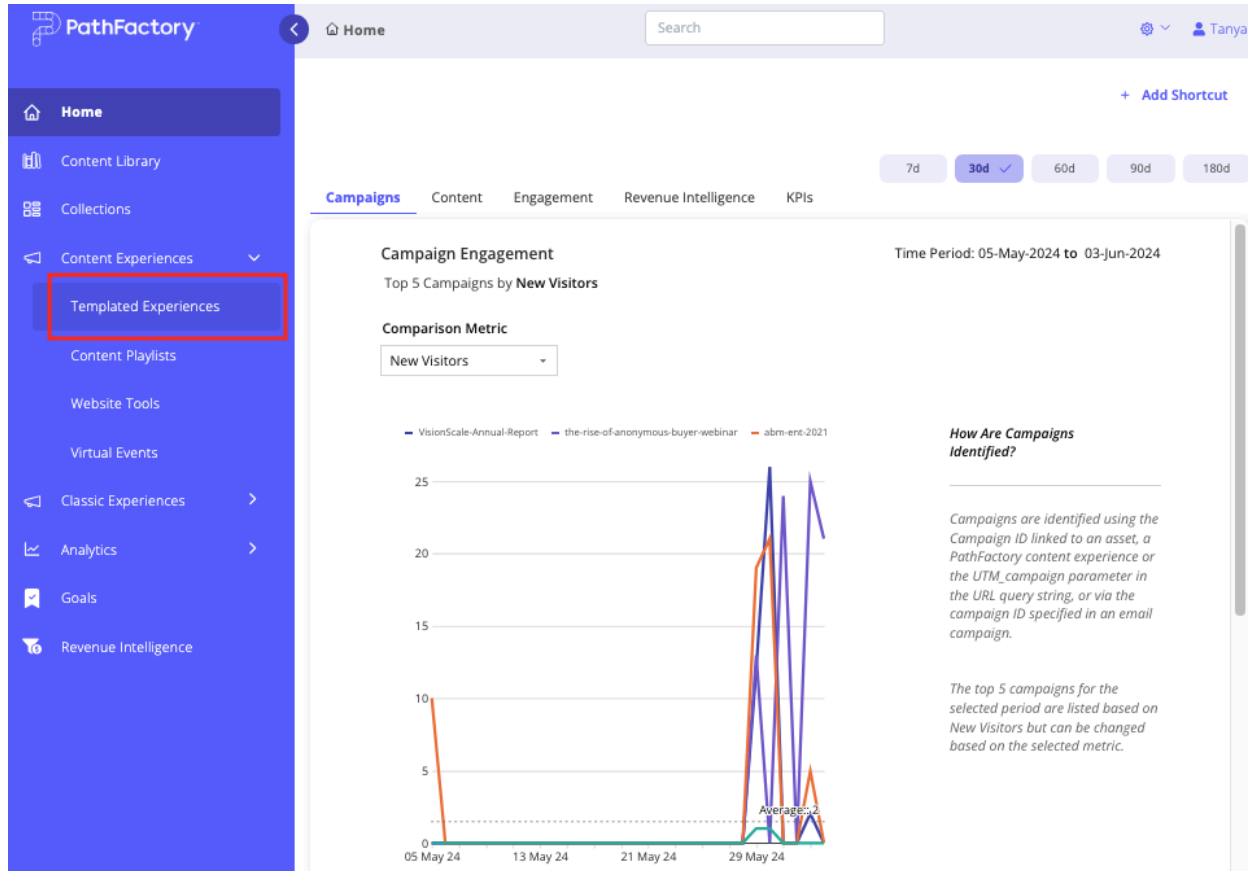
**General**

- Theme**: Theme 4.0 Test
- Theme Version**: 4.0
- Experience ID**: 8pWy85
- Experience Name**: Content Playlist April 2024
- Folder Name**: Root
- Url Path**: content-playlist-apr-1
- Search Engine Directive**: No Index, Follow
- Cookie Consent**: On

**Content Playlist Access Protection**

At the bottom right of the right-hand panel, a red box highlights the edit icon (a pencil).

- **If you are doing this for a Templated Experience**, open the side panel and select Templated Experiences.



- From the list that appears, select the Templated Experience you want to edit.

The screenshot displays the 'Templated Experiences' management interface. On the left is a sidebar with navigation icons. The main area shows a list of experiences with columns for checkboxes, names, types, dates, last updated times, added by, and folders. The 'Demo - Resources' experience is selected. On the right, a details panel for 'Demo - Resources' is open, showing general information like theme, version, ID, name, folder, URL path, search engine directives, and cookie consent. Below this are sections for 'Content Playlist Access Protection' and 'Templated Experience Access Protection'. At the bottom right, there are 'Edit', 'Copy', and 'Delete' icons.

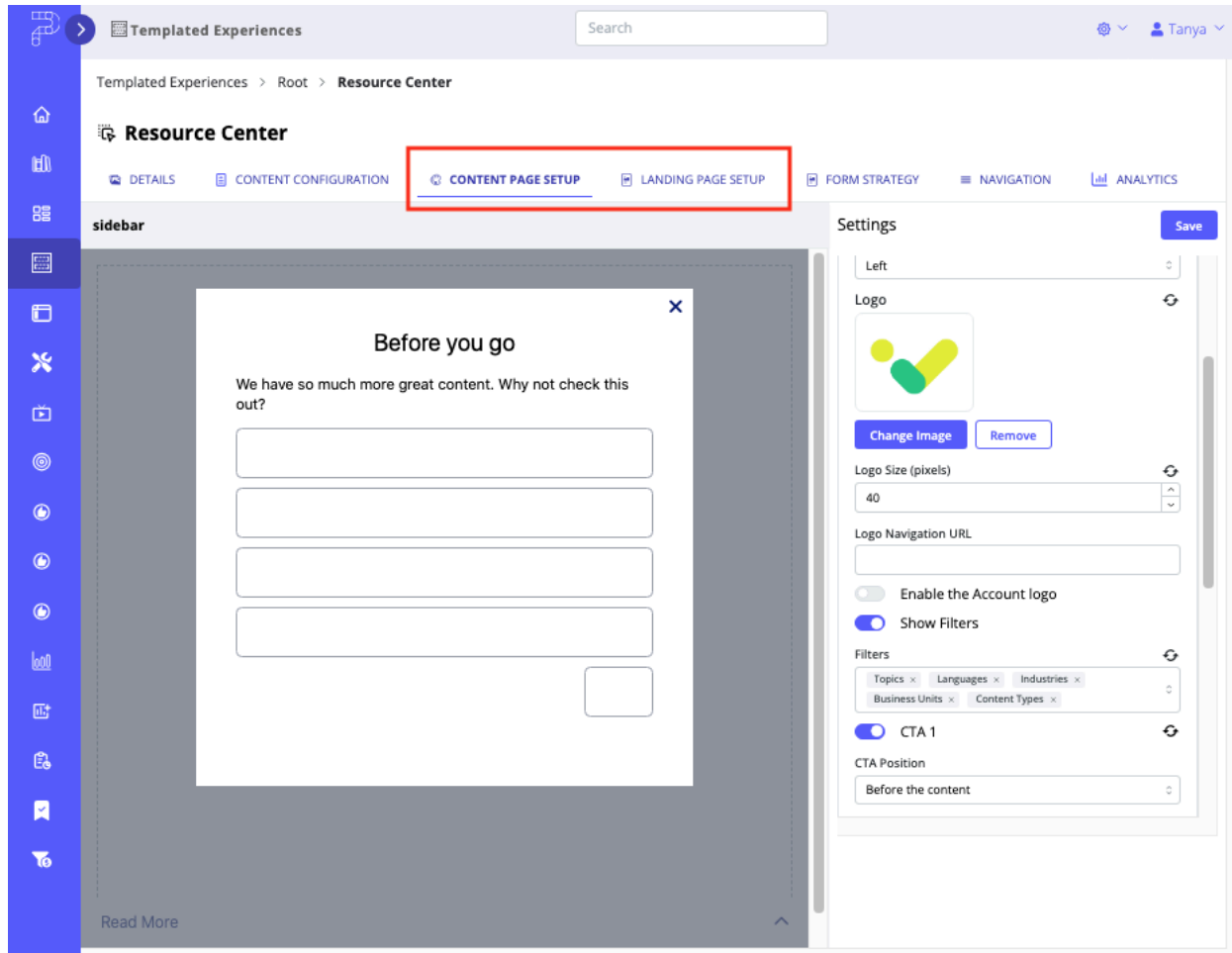
<input type="checkbox"/>	Experience Name	Type	Date Published	Last Updated	Added By	Folder
<input type="checkbox"/>	Maddie - McKesson	Templated Experience	05-06 11:31 am	2024-06-04 12:35 pm	samkit	Root
<input checked="" type="checkbox"/>	Demo - Resources	Templated Experience	2024-03-01 12:50 pm	2024-06-04 12:05 pm	levfendrikov	Root
<input type="checkbox"/>	Olivia - Trolley	Templated Experience	2024-06-04 11:52 am	2024-06-04 11:52 am	oliviang	Sales
<input type="checkbox"/>	Dimo - Vertice	Templated Experience	2024-06-04 11:14 am	2024-06-04 11:14 am	samkit	Sales
<input type="checkbox"/>	Gary - Recorded Future	Templated Experience	2024-05-31 12:10 pm	2024-05-31 12:10 pm	samkit	Sales
<input type="checkbox"/>	Dimo - Procore	Templated Experience	2024-05-30 2:09 pm	2024-05-30 4:16 pm	samkit	Sales
<input type="checkbox"/>	Charlie - Edifecs	Templated Experience	2024-05-29 2:04 pm	2024-05-30 3:34 pm	samkit	Root
<input type="checkbox"/>	Olivia - Tiplati	Templated Experience	2024-05-30 1:50 pm	2024-05-30 1:50 pm	samkit	Sales
<input type="checkbox"/>	Product Announcements	Templated Experience	2024-05-29 12:42 pm	2024-05-29 12:42 pm	suchet	Root
<input type="checkbox"/>	Olivia - 1Password	Templated Experience	2024-05-28 3:22 pm	2024-05-28 3:22 pm	oliviang	Sales
<input type="checkbox"/>	Maddie - SoftServe	Templated Experience	2024-05-27 8:08 am	2024-05-28 2:44 pm	samkit	Root
<input type="checkbox"/>	Gary - Markel	Templated Experience	2024-05-28 12:08 pm	2024-05-28 12:08 pm	samkit	Sales

**Details for Demo - Resources:**

- Theme:** Marketing Base Theme - 2024
- Theme Version:** 4.0
- Experience ID:** gL1h2X
- Experience Name:** Demo - Resources
- Folder Name:** Root
- Url Path:** demo-resources
- Search Engine Directive:** No Index, Follow
- Cookie Consent:** On

Navigation: << Previous 1 2 3 4 5 ... 10 Next >> 50 per page

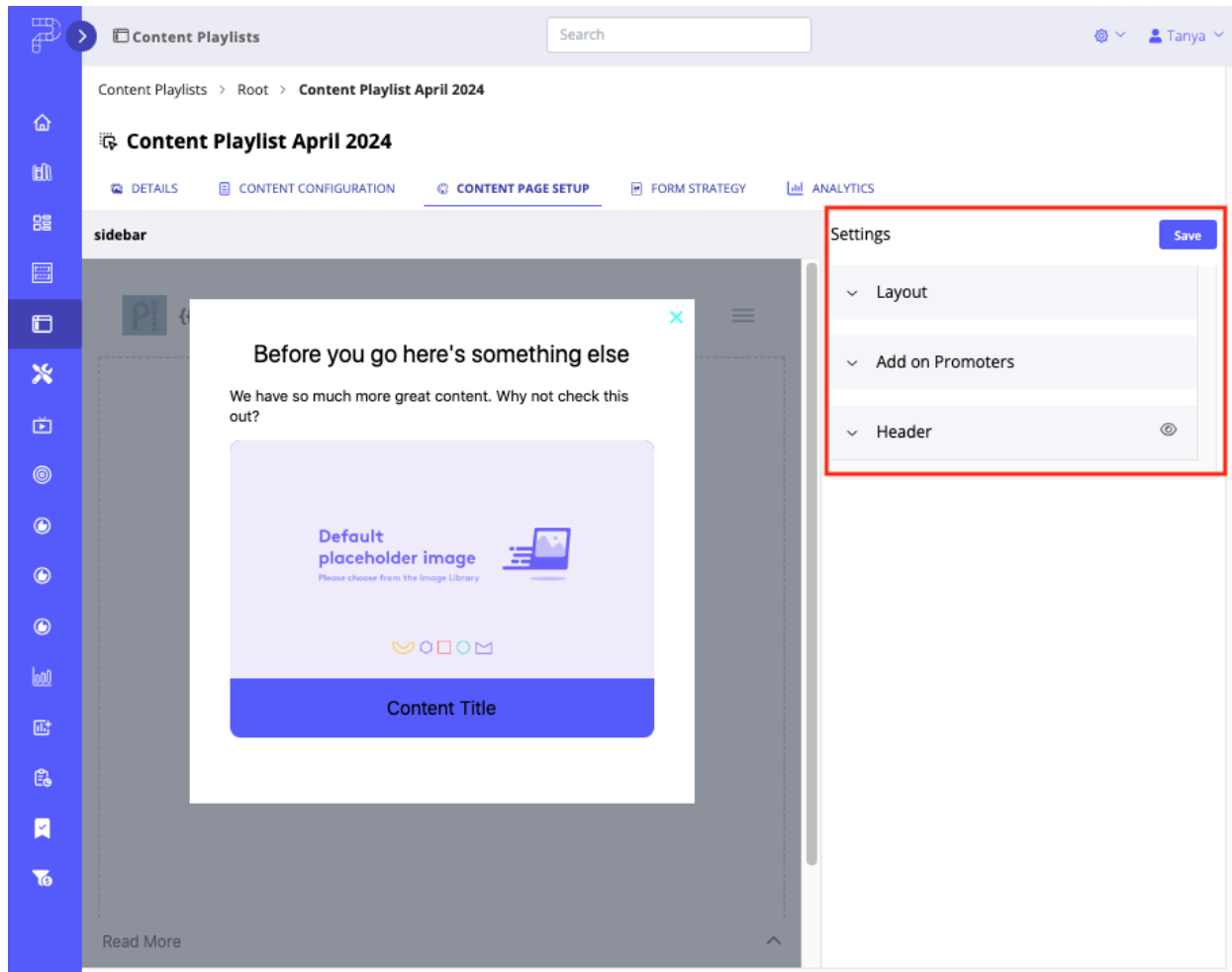
- Next, navigate to either the **Content Page Templates** tab or the **Landing Page Templates** tab, depending on which Page Template you are working on, as highlighted below.



2. Whichever Experience type instructions you followed above (Playlist, Content Page or Landing Page), you should now see a menu on the right side of your screen like the one below. Expand this to view the available layout options for inserting your Customer Field Merges that will drive dynamic personalization based on what you defined in Segment Rules.

Below is a screen capture of a Content Playlist open for editing, with the expandable menus highlighted.

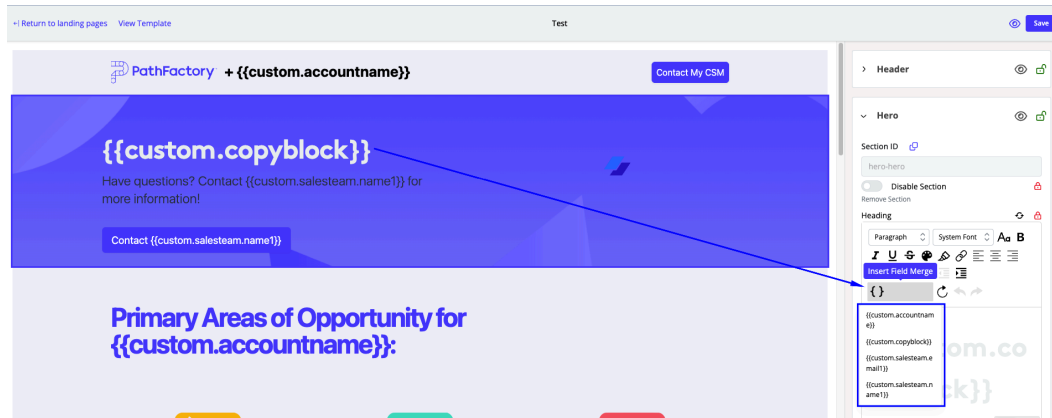




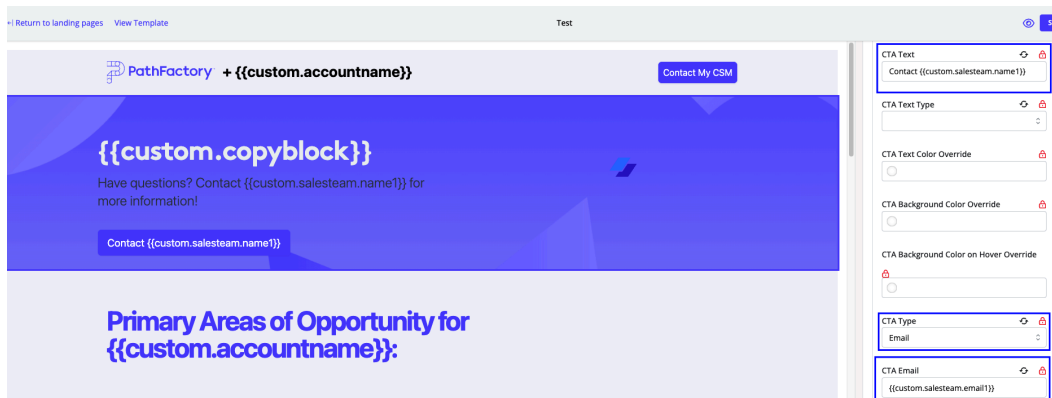
3. Expand the menus on the right side to edit the layout, add promoters, and more.

**Note:** For details on how to customize the Page Templates design appearance and style, refer to the article, read [Introduction to Templated Experiences](#). For details on how to customize the appearance of a Content Playlist, refer to [Introduction to Content Playlists](#).

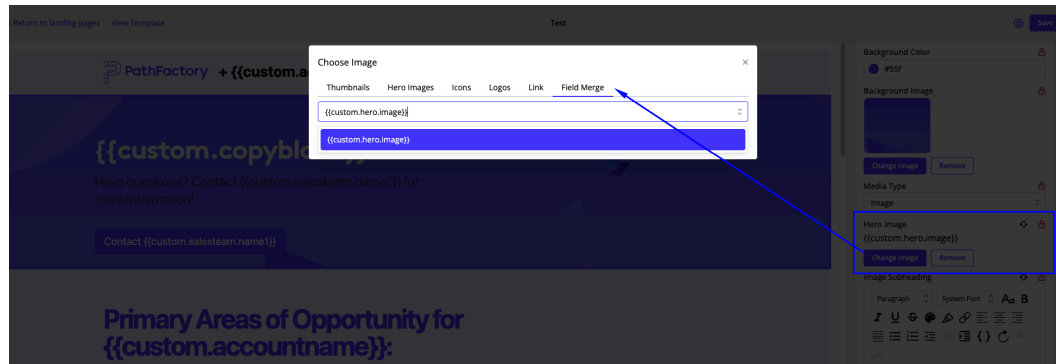
- To dynamically personalize text, open the rich text editor. Click the { } icon to access the list of available field merges from a dropdown menu, as shown in the screen capture below. For example, for the Landing Page header you could select {{custom.MembershipLevel}}, which is useful for membership sites to display user's current membership level, like "Status: {{custom.MembershipLevel}} Member"



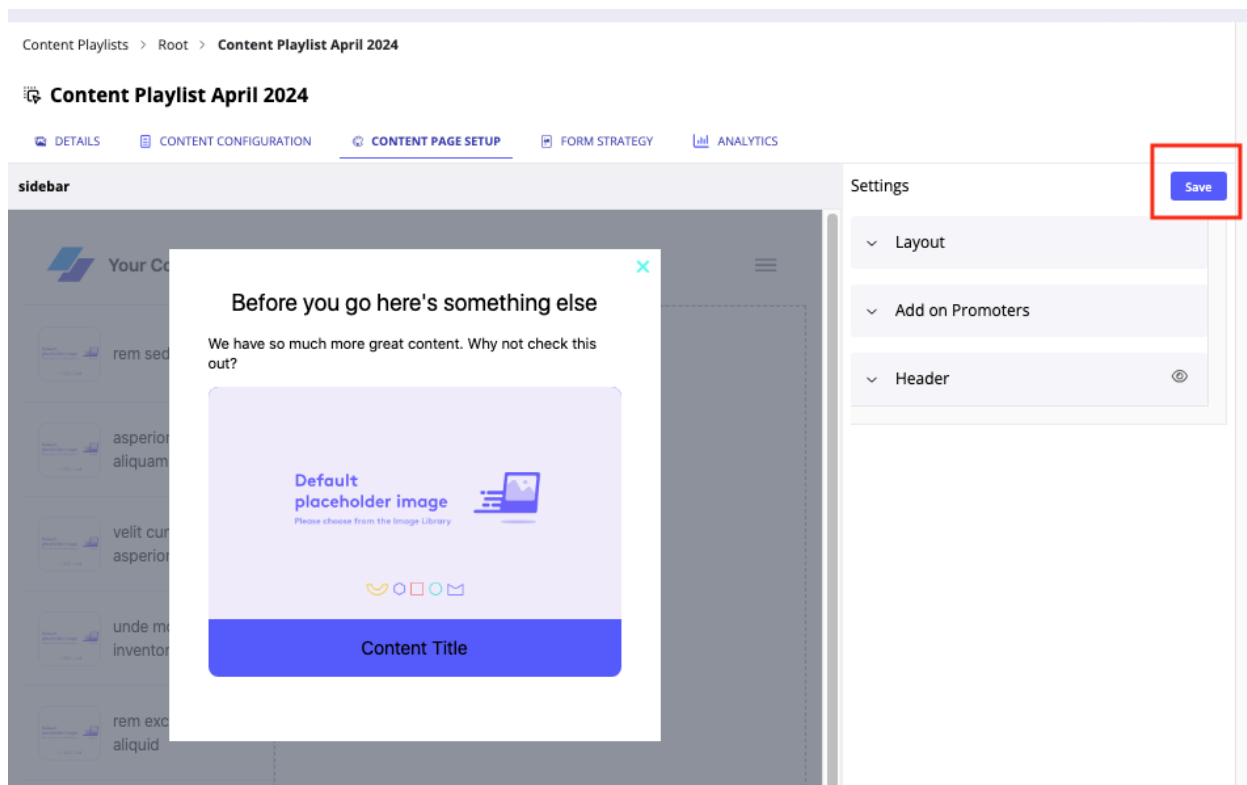
- To configure CTAs to have custom text, such as personalizing a webinar registration CTA, you could use Custom Field Merges that pull from data specific to each visitor's interests or industry. For example, "Join Our Exclusive Webinar Tailored for {{Custom.User\_Industry}} Professionals!"



- For configuring images and videos, use Custom Field Merges to dynamically change visual content based on viewer data and behavior. To add a field merge to an image, in any section that has an image, select Change Image. In the resulting pop up menu, select the Field Merge as shown in the screen capture below.



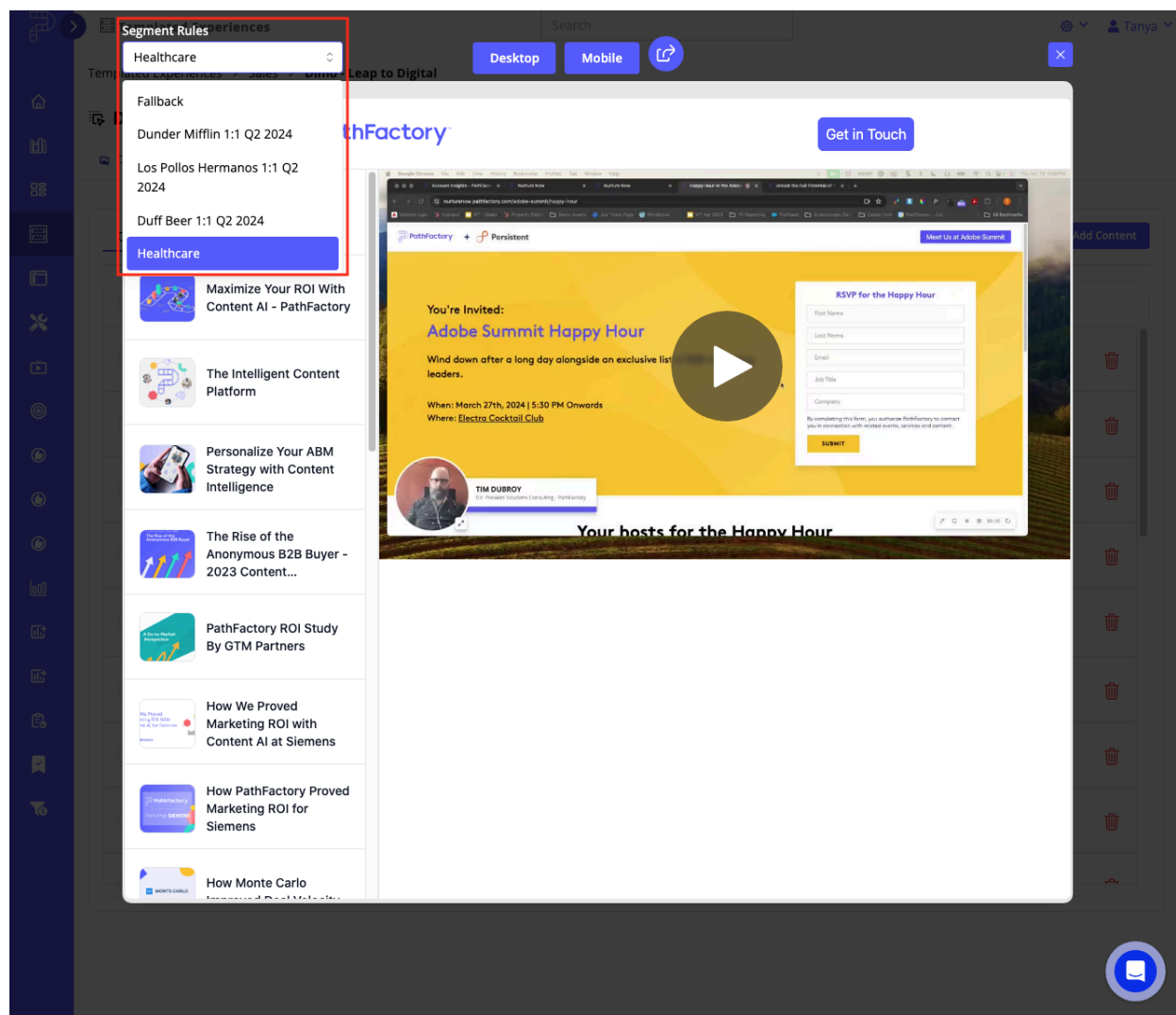
- When you are finished adding your Custom Field Merges to the Content Playlist or Page Template, click the **Save** button to lock in your changes.



## Step 7: Preview Your Experience

Once you have configured your experience, you can preview the impact of different Segment Rules before you activate it with audiences.

To begin, open a preview of the Templated Experience Landing Page, Content Page, or Content Playlist. Along the top of the screen, you'll see options for previewing Desktop and Mobile as usual, but there is also a Segment Rules dropdown list on the top left of the screen. By selecting from the list, you can preview what the Experience will look like for each customer and for the fallback Experience.



# How to Activate and Share Your Experience

You can generate a URL link to share a dynamic version of an Experience or a static version, depending on your audience, activation and channel preferences.

## Unknown Visitors

If you're sharing your Page or Playlist with primarily unknown visitors (e.g., through organic social media or paid ads), you should use a dynamic version of the Experience. This ensures the content updates based on the visitor's identity.

## Known Visitors

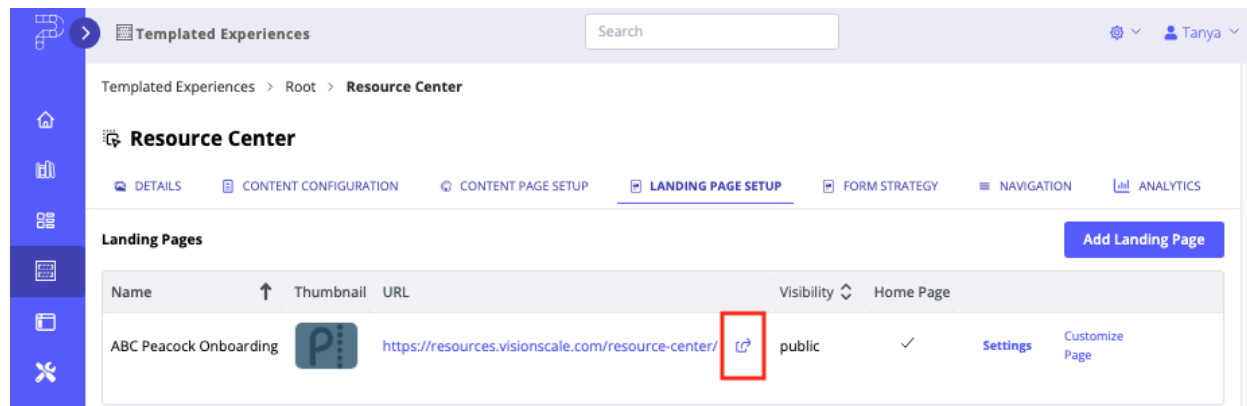
If you're sharing your Experience with known visitors (e.g., within an email nurture campaign) or providing sales with custom URLs for specific account pages, you should grab a custom URL for the Experience to ensure that visitors get sent directly to their specific version of the experience.

## How to Navigate to the Share Link Menu

Depending on the type of Experience you are planning to share, follow one of the directions below.

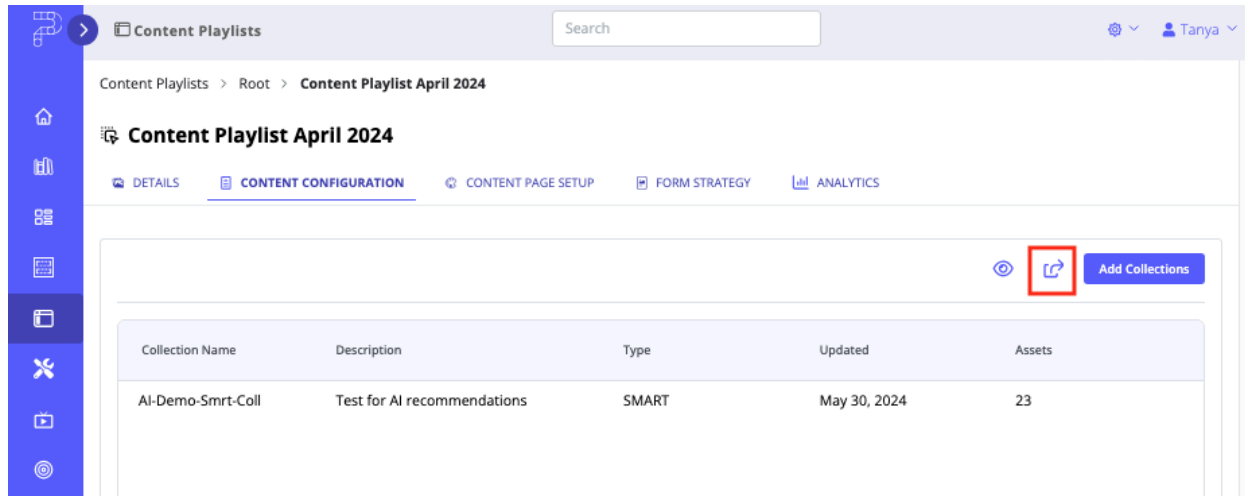
### Share Link for Landing Pages

With a Templated Experience open in edit mode, select the Landing Page Setup tab. The Sharing link appears, as highlighted in the screen capture below.



## Share Link for Content Playlists

Open a Content Playlist in edit mode, and then select the Content Configuration tab. The Sharing link appears as highlighted on the screen capture below.



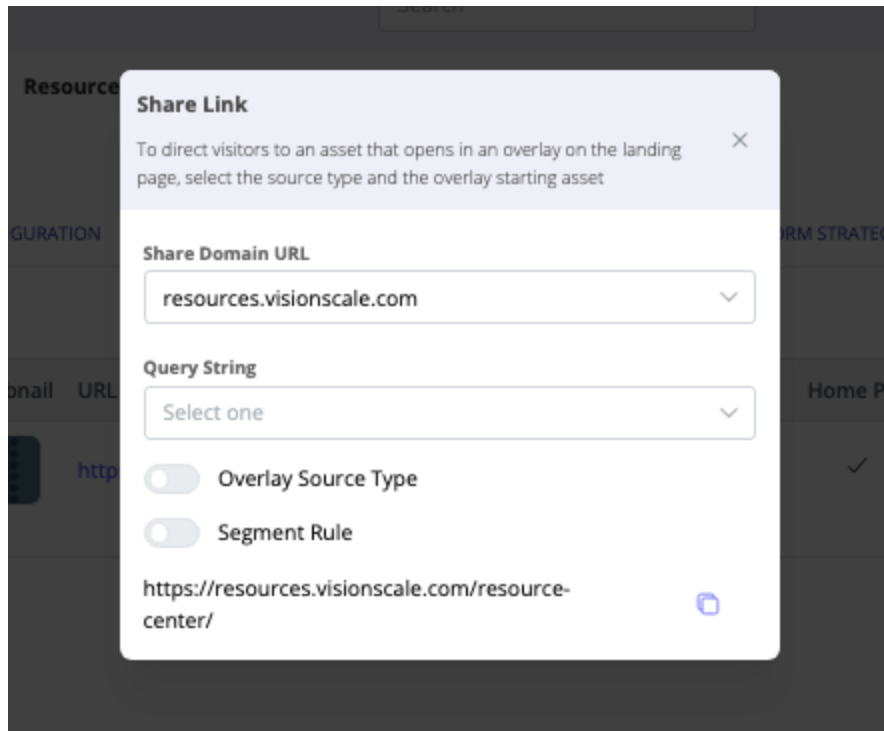
## How to Share an Experience to Unknown Visitors

The process described below enables you to create one link that will change based on the identity of the visitor.

If you have many anonymous users visiting your content from various channels, you want to provide a Landing Page that has Dynamic Personalization to customize the Landing Page contents based on visitor behavior, follow the steps below.

1. With the **Share Link** popup menu open, turn the Segment Rule toggle **off** to generate a dynamic version of the Experience.

**Note:** Turning **off** the Segment Rule toggle generates a dynamic version of the page, which will change based on what information can be picked up about the visitor's firmographics and identity.

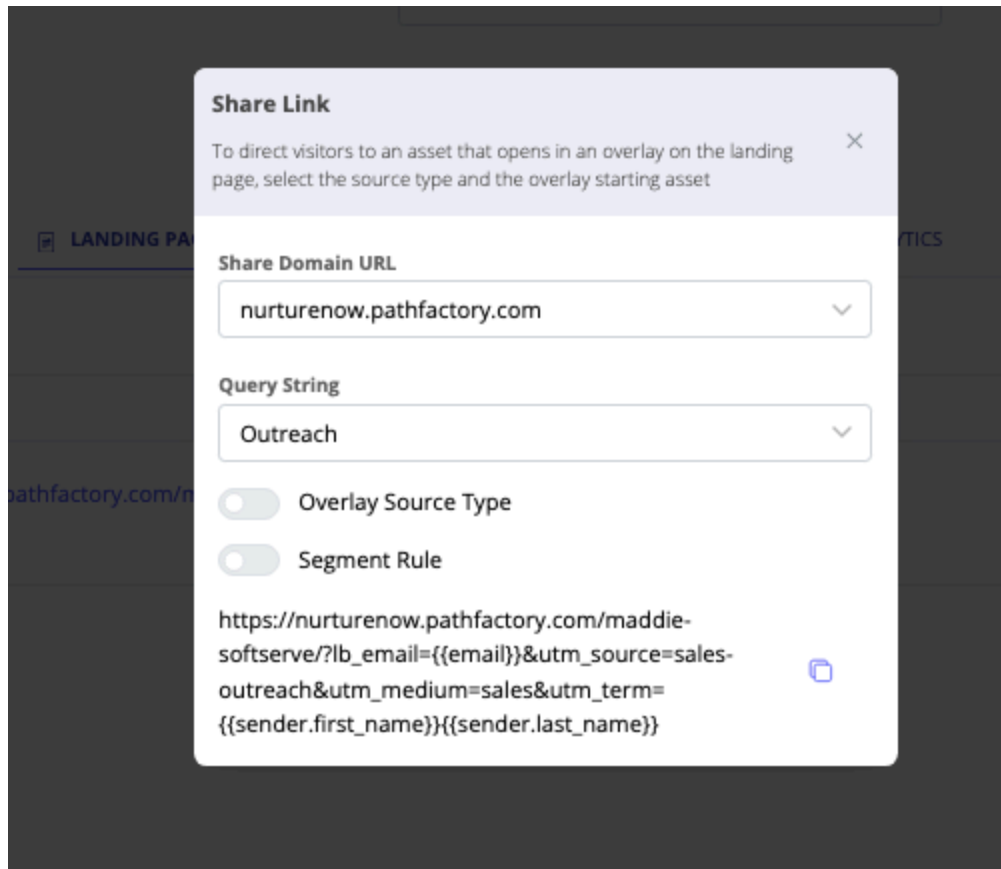


2. Click the clone icon to copy the updated URL to your clipboard.
3. Share this link wherever you are activating your content/campaigns across channels. Anyone clicking the link will see a personalized version of the Landing Page.

## How to Share an Experience to Known Visitors

If you want to share a Landing Page with known contacts in an email nurture campaign, you can share a static Experience URL that is customized for a specific audience segment.

1. In the **Share Link** popup menu, fill in the **Share Domain URL** and **Query String** fields as shown in the example below.



## 2. Optional Steps:

- **Overlay Source Type toggle** - When this toggle is activated, once you select a starting asset, generates a share link to that asset pre-loaded as an overlay on top of the Landing Page.
  - **Overlay Starting Asset** - From this dropdown list, select exactly which content asset you want to display first to the visitor.
- Source Type dropdown menu - Select Content Assets or Featured:
  - **Content Assets** - This option allows you to select from your existing library of content assets. You can choose specific content that will be shown to the visitor.
  - **Featured** - This option lets you highlight specific content or collections of content that you want to emphasize to the visitor. It's typically used for promoting particular assets or campaigns.



Search

### Share Link

To direct visitors to an asset that opens in an overlay on the landing page, select the source type and the overlay starting asset



#### Share Domain URL

nurturennow.pathfactory.com



#### Query String

Outreach



☒ Overlay Source Type

#### Source Type: ⓘ

Content Assets



#### Content Assets ⓘ

Content List



#### Overlay Starting Asset: ⓘ

How Genesys Streamlined ABM Efforts To Boost Engag



☒ Segment Rule

#### Segment Rule

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https://nurturennow.pathfactory.com/maddie-softserve/?lb\_email={{email}}&utm\_source=sales-outreach&utm\_medium=sales&utm\_term={{sender.first\_name}}  
{{sender.last\_name}}&pf\_sr=7&overlay\_url=https%3A%2F%2Fnurturennow.pathfactory.com%2Fmaddie-softserve%2Fc%2Fhttps-www-pathfactor-187%3Fpfid%3D21779%26pf\_sr%3D7



3. Turn on the **Segment Rule** toggle. In the **Segment Rule** dropdown list that appears, select an audience segment.
4. Click the Clone icon in the lower right corner of the menu to copy the updated URL to your clipboard.
5. Use this link in your email nurture campaign. Known leads clicking this link will see a personalized version of the Landing Page that displays relevant and engaging content tailored just for them.