Developer Quickstart
Suggest Edits
Introduction
Welcome to the Lytics developer tier! This guide will walk you through the steps to get started with Lytics and leverag

Before You Begin
Before diving into the setup process, make sure you have the following:

Site Access / Management Permission: To install Lytics, you need permission to install JavaScript either via a tag mar
tall Lytics via a Drupal module.
Active Lytics Account: Verify that you can access an active Lytics account. If you don't have one yet, you can claim you
Lytics Dev Tools Chrome Extension: Install our developer tools Chrome extension to streamline the development an
Getting Started Checklist
Getting started with Lytics is quick and easy! In just a few minutes, you'll be able to set up Lytics and start personalizi
al steps to ensure a positive experience for you and your customers:

1. Install the Lytics tag on your site.
2. Ensuring site content and Lytics are syncing.
3. Create your first personalized message.

Digging Deeper
After completing the initial checklist outlined above, it's time to explore further avenues for enhancing and utilizing y
onal guides into two core focuses:

Building Profiles
Here, we'll gain a comprehensive understanding of all available out-of-the-box attributes. Discover how to tag your s
ve profiles. This section is divided into:

Default Attributes & Segments:
Profile Attributes
Audience Segments
Content Collections
Site Activity & Conversion Tagging:
Capturing Website Activity (coming soon)
Capture Website Conversion Activity (coming soon)
Using Profiles
Here, we'll explore leveraging out-of-the-box personalization SDKs and APIs to deliver optimal user experiences. Disc
lored experiences that resonate with your audience. This section covers:

Guides & Inspiration
Surface a lead capture form only to unknown visitors.
Surface content recommendations based on interests.
Surface a promotional message to high-momentum visitors. (coming soon)
Sync profiles & audiences to GA4 or meta. (coming soon)
Personalize your site based on behaviors and stored attributes. (coming soon)
SDK Documentation
Web
JavaScript SDK
Personalization SDK
Mobile
iOS SDK
Android SDK
React Native SDK
Updated 5 months ago

What’s Next
1. Account Setup

1. Install the Lytics Tag
Suggest Edits
Installing the Tag

In the Web SDK, Lytics provides a tag that can be placed on your site to collect behavioral data and surface the mate
llation instructions are available from within the app at Data Pipeline > SDK > Web SDK.

If your site is a Drupal or Wordpress site, or you use Google Tag Manager we recommend using one of these turnkey

Drupal
WordPress
Google Tag Manager
Testing the Lytics Tag Installation
Once the tag has been installed, validate a successful installation via one of the three following methods:

Lytics Dev Tools Chrome Extension (Recommended)
In-app Verification Assistant
Manually
Testing the Current Visitor's Profile via JavaScript SDK
The final step to verify installation is ensuring you can access your visitor profile. This profile is built and delivered in

Lytics Dev Tools Chrome Extension (Recommended)
Manually
Updated 4 months ago

What's Next
2. Content Setup
2. Content Setup
Suggest Edits
Lytics' Interest Engines effectively analyze your content with minimal effort required. However, to guarantee that the
g a quick test is advisable, as poor metadata can sometimes lead to less-than-optimal outcomes. The most reliable m
ion is to classify a selection of your URLs manually.

Use the left-hand navigation to select Content > Classification.
Click on the section labeled Classify, then paste a URL from your website and press Classify.
After a moment or two, a set of preliminary classification details will come back. Most notably, ensure the Title, Prim
please refer to our full documentation for configuring content and meta tags.

Updated 4 months ago

What's Next
3. Surface Personalized Message
3. Surface Personalized Message
Suggest Edits
The Lytics Personalization Engine profiles real-time access to a comprehensive visitor profile. Before we jump into th
et's create our first experience.

Surface a Simple Message
Lytics comes with our Personalization SDK called Pathfora. Pathfora allows you to easily surface simple lead capture
ion for Pathfora is available, but initially, let's surface a welcome message to our anonymous visitor audience.

javascript

```
// jstag profiles a helper function to ensure that the Pathfora library
// has been loaded before triggering the experience.
jstag.on('pathfora.publish.done', function(topic, event){
  // here we initialize a new Pathfora "Message" experience
  var module = new pathfora.Message({
    id: 'sample-message-campaign', // this value will be collected along side all interactions and used in reporting
    layout: 'slideout', // for layout we'll use a small slide out
    position: 'bottom-left', // the model will enter and sit at the bottom left
    theme: 'dark', // css can be customized to brand but we'll use the default dark theme
    headline: 'Hello world!', // this will be the headline of our message
    msg: 'Congratulations on setting up your first targetted campaign using the Lytics Personalization Engine!', // the b
```

```
  });

  var modules = {
    target: [{
      segment: "anonymous_profiles", // target only visitors with the anonymous_profile attribute
      widgets: [module]
    }]
  };

  pathfora.initializeWidgets(modules); // initialize the campaign
});
```

Alter the Pathfora configuration to your liking.

Install the Pathfora configuration onto your site via your preferred tag management method.

Refresh the page and be greeted with your new welcome message targeted at anonymous visitors!

Lytics and Pathfora provide a great deal of flexibility. If you are ready to dive deeper, please explore some of our oth

Surface a Promotional Message to High Momentum Visitors (coming soon)
Surface a Lead Capture form Only to Unknown Visitors
Surface Content Recommendations Based on Interests (coming soon)
Sync Profiles & Audiences to GA4 or Meta (coming soon)
Personalize Your Site Based on Behaviors and Stored Attributes (coming soon)
Updated 5 months ago
Building Profiles
Suggest Edits
Welcome to the world of building profiles with Lytics! Here, you can unlock the full potential of understanding your a
x:

Default Profile Attributes: Lytics offers a robust set of pre-packaged user attributes, including automatically generate
 machine learning algorithms, these attributes enable you to gain deeper insights into your audience.

Default Segments: Explore predefined user segments that categorize your audience based on behavioral and demog
nts offer quick insights for tailored marketing strategies.

Ready to dive in? Click on each section to explore the details and enhance your profiling efforts effortlessly. Looking
g all the available attributes.

Updated 10 months ago

Default Attributes
Suggest Edits
Lytics offers a wide range of pre-packaged user attributes, including automatically generated and customizable ones
rning algorithms to provide insights and scores, allowing users to gain a deeper understanding of their audience. Th
d examples to enhance your profiling efforts.

▯
If you haven't already reviewed our documentation on collecting events via our JavaScript SDK, we highly recommen
ata collection works at a high level before delving into the specifics of what can be collected.

Available Attributes
The following attributes are all available out of the box with no customization necessary in all Lytics pricing tiers. Do
ted directly but are computed based on various factors, including other non-computed attributes.

▯
For a more comprehensive example of how any of the following attributes can be collected and used for your visitor

w.

Identifiers
Default attributes that are used to stitch profiles together. For instance, if you pass an email along with the _uid, all e
r will be merged into a single comprehensive profile.

Name	Slug	Description	Computed	Example
Lytics ID	_id	A unique ID that represents the materialized profile in Lytics.	Yes	4fafb5b3-b199-58f2-a68b-4b266b36
Current Lytics Cookie	_uid	The current cookie id for the user.	No	50b772f5-a0be-42f2-8828-84b8db5d5a23
All Lytics Cookies	_uids	All cookies that are associated with the user.	No	["50b772f5-a0be-42f2-8828-84b8db5d5a2
Email	email	The email address of the user.	No	example@lytics.com
Unique User ID	uuid	A UUID for the user.	No	4fafb5b3-b199-58f2-a68b-4b266b363dd1

Details
Details encompass all default attributes related to user demographics and general information, including name, pho
specifically tied to interactions or behaviors.

Name	Slug	Description	Computed	Example
Name	name	The full name of the user.	No	John Doe
First Name	first_name	The first name of the user.	No	John
Last Name	last_name	The last name of the user.	No	Doe
Title	title	The title of the user.	No	President
Phone	phone	The phone number of the user.	No	555-555-5555
Cell	cell	The cell phone number of the user.	No	555-555-5555
Origin	origin	The origin of the user.	No	loyalty_2022
Language	language	The language of the user.	No	en-us
Age	age	The age of the user.	No	25
Companies	companies	The companies the user is associated with.	No	["Lytics", "Pantheon"]
Gender	gender	The gender of the user.	No	M
Status	status	The status of the user.	No	active
User Attributes	user_attributes	A map of custom attributes associated with the user.	No	{"role": "member", "bonu
Timezone	timezone	The timezone of the user.	No	-7
City	city	The city of the user.	No	Denver
Country	country	The country of the user.	No	US
State	state	The state of the user.	No	CO

Meta
Meta encompasses all system-level information that provides insights into the health and breadth of the profile. This
rce information, and other metadata associated with the profile's management and maintenance. Metadata offers a
tion.

Name	Slug	Description	Computed	Example
Created	_created	The date the user was created.	Yes	2023-12-12T21:09:11.625960142Z
Last Scored	_last_scored	The date the user was last scored.	Yes	2024-02-28T02:45:51.377423153Z
Modified	_modified	The date the user was last modified.	Yes	2024-02-28T02:45:51.377423473Z
Number of Aliases	_num_aliases	The number of aliases for the user.	Yes	1
Number of Days	_num_days	The number of days the profile has existed.	Yes	38
Number of Events	_num_events	The number of events the user has been associated with.	Yes	2425
Number of Streams	_num_streams	The number of streams the user has been associated with.	Yes	2
Stream Names	_streamnames	The names of the streams the user has been associated with.	Yes	["default", "ios"]
User is Bot	is_bot	Whether the user has been flagged as a bot or not.	Yes	f

Behavior
Behavioral attributes typically cannot be directly managed but represent a set of insights derived from a user's beha
experiences based on changes in behavior or behaviors indicative of high likelihood. For instance, you might want to
n usual. Behavioral attributes enable targeted and timely interventions tailored to user actions and patterns.

Name	Slug	Description	Computed	Example
Consistency	score_consistency	Score representing how consistent their activity patterns are.	Yes	99
Frequency	score_frequency	A score representing how frequently the user is active.	Yes	63
Intensity	score_intensity	A score representing how intense the user's activity is.	Yes	94
Maturity	score_maturity	A score representing how mature the user's activity is.	Yes	34
Momentum	score_momentum	A score representing how much momentum the user currently has.	Yes	54

Propensity	score_propensity	A score representing how likely the user is to engage again.	Yes	1
Quantity	score_quantity	A score representing how much activity the user has.	Yes	99
Recency	score_recency	A score representing how recent the user's activity is.	Yes	99
Volatility	score_volatility	A score representing the degree of variability in behavior.	Yes	99

Interests

Interests entail understanding the topics a user is interested in based on their interactions, cross-referenced by deep
for tailored content recommendations and targeted messaging aligned with the user's preferences and engagemen

Name	Slug	Description	Computed	Example
Lytics Content	lytics_content	A map of topic-level interests for the user.	Yes	{"Baking": 0.26418695138978837}

Intelligence

Attributes classified as intelligence encompass diverse, highly valuable information to facilitate relevant and high-val
cover real-time segment membership, values crucial for split testing and experimentation, and direct correlation to c
dynamic and data-driven decision-making, enhancing the efficacy of personalized marketing strategies.

Name	Slug	Description	Computed	Example
Segment Membership	_segments	The segments the user is associated with.	Yes	["all", "anonymous_profiles", "sm
Split	_split	A random value that is evenly distributed across users.	Yes	74
Split 2	_split2	A random secondary value that is evenly distributed across users.	Yes	58
Needs Message	needs_message	Stream-specific score that represents the relative distance between now and the r		
Next Event	next_event	Stream-specific prediction for the next expected event.	Yes	{"default": "2024-03-01T03:00:0
Lookalike Model Predictions	segment_prediction	Scores from Lytics Lookalike and SegmentML models.	Yes	{"likel
Lookalike Model Percentiles	segment_prediction_percentile	Percentiles from Lytics Lookalike and SegmentML mod		

Activity

Activity encompasses the user's engagement across different channels and campaigns, including clicks and conversi
campaign optimization and channel effectiveness assessment.

General

Name	Slug	Description	Computed	Example
First Seen	event_first_seen	The first time the user was seen for a specific event.	No	{"click": "2023-12-12T21:09:11.
Last Seen	event_last_seen	The last time the user was seen for a specific event.	No	{"click": "2024-02-28T02:45:49.7
Channels	channels	The channels the user has been active on.	No	["web", "email"]
Devices	devices	The devices the user has been active on.	No	{"desktop": 123}
Hourly	hourly	The number of events per hour for the user.	Yes	{"0": 17, "1": 69, "2": 262, "3": 97}
Hour of Week	hourofweek	The number of events per hour of the week for the user.	Yes	{"3": 2, "4": 2, "5": 1, "11":
Last Active	last_active_ts	The last time the user was active.	No	2024-02-28T02:45:50.784Z
Last Channel Activities	last_channel_activities	The last time the user was active on a specific channel.	No	{"web": "

Web

Name	Slug	Description	Computed	Example
Domains	domains	The domains the user has been active on.	No	["umami.lytics.com"]
First Visit Timestamp	firstvisit_ts	The first time the user visited the site.	No	2023-12-12T21:09:11.625Z
Last Visit Timestamp	lastvisit_ts	The last time the user visited the site.	No	2024-02-28T02:45:50.784Z
Pageview Count	pageviewct	The number of pageviews the user has had.	Yes	234
Referring Domain	refdomain	The referring domain for the user.	No	["umami.lytics.com"]
User Agent	user_agent	The user agent for the user.	Yes	Chrome
Visit Count	visitct	The number of visits the user has had.	Yes	145
Visit City	visit_city	The city the user visited from.	Yes	Denver
Visit Country	visit_country	The country the user visited from.	Yes	US
Visit Region	visit_region	The region the user visited from.	Yes	CO
Form Data	form_data	The form data the user has submitted.	No	{"first_name": "John"}
Forms Submitted	forms_submitted	The forms the user has submitted.	No	["newsletter", "contact"]
UTM Campaign Last	utm_campaign_last	The last UTM campaign referred from.	No	holiday
UTM Campaigns	utm_campaigns	The UTM campaigns the user has interacted with.	No	["holiday", "summer"]
UTM Content Last	utm_content_last	The last UTM content referred from.	No	recipe-1
UTM Contents	utm_contents	The UTM contents the user has interacted with.	No	["recipe-1", "recipe-2"]
UTM Medium Last	utm_medium_last	The last UTM medium referred from.	No	article
UTM Mediums	utm_mediums	The UTM mediums the user has interacted with.	No	["article", "recipe"]
UTM Source Last	utm_source_last	The last UTM source referred from.	No	google_ads
UTM Sources	utm_sources	The UTM sources the user has interacted with.	No	["google_ads", "meta_ads"]
UTM Term Last	utm_term_last	The last UTM term referred from.	No	example

UTM Terms	utm_terms	The UTM terms the user has interacted with.	No	["example"]

Campaign

Name	Slug	Description	Computed	Example
Hover	ly_hover	The number of times the user hovered over a specific campaign.	No	{"content-rec-modal": 5}
Impressions	ly_impressions	The number of times the user saw a specific campaign.	No	{"content-rec-modal": 1}
Closes	ly_closes	The number of times the user closed a specific campaign.	No	{"content-rec-modal": 10}
Conversions	ly_conversions	The number of times the user converted on a specific campaign.	No	{"content-rec-mo
Milestones	ly_milestones	The number of times the user reached a milestone on a campaign.	No	{"engaged-donat
Goals	ly_goals	The number of times the user reached a goal on a campaign.	No	{"made-donation": 1}

Examples

Identifiers

Lytics ID (_id)

This is an automatically generated canonical ID managed by Lytics. It refers to the materialized profile and cannot be

Current Lytics Cookie (_uid) and All Lytics Cookies (_uids)

_uid represents the Lytics anonymous 1st party cookie. This value is automatically captured with every jstag.send() c
e is to explicitly set the value of _uid, which we do not recommend.

JavaScript

```
jstag.setid("somecustomvalue");
jstag.send();
```

Email (email)

JavaScript

```
jstag.send({
  email:"example@lytics.com"
});
```

Unique User ID (uuid)

JavaScript

```
jstag.send({
  uuid:"someuniqueuserid"
});
```

Details

First Name (first_name)

JavaScript

```
jstag.send({
  first_name:"John",
});
```

Last Name (last_name)

JavaScript

```
jstag.send({
  last_name:"Doe",
});
```

Title (title)

JavaScript

```
jstag.send({
  title:"President",
});
```

Phone (phone)

JavaScript

```
jstag.send({
  phone:"555-555-5555",
});
```

Cell (cell)

JavaScript

```
jstag.send({
  cell:"555-555-5555",
});
```
Origin (origin)
JavaScript

```
jstag.send({
  origin:"loyalty_2022",
});
```
Language (language)
By default, the Lytics JavaScript SDK will collect language information based on the browser, but this can be overridd

JavaScript

```
jstag.send({
  _ul:"en-us",
});
```
Age (age)
JavaScript

```
jstag.send({
  age:25,
});
```
Companies (companies)
JavaScript

```
jstag.send({
  companies:["Lytics", "Pantheon"],
});
```
Gender (gender)
JavaScript

```
jstag.send({
  gender: "N/A",
})
```
Meta
Created (_created)
Lytics automatically generate this and represents the oldest event associated with the user.

Modified (_modified)
This is automatically generated by Lytics and represents the last time the user was modified.

Last Scored (_last_scored)
This is automatically generated by Lytics and represents the last time the users scores were updated.

Number of Aliases (_num_aliases)
This is automatically generated by Lytics and represents the number of aliases associated with the user.

Number of Days (_num_days)
This is automatically generated by Lytics and represents the number of days the user has existed.

Number of Events (_num_events)
This is automatically generated by Lytics and represents the number of events associated with the user.

Number of Streams (_num_streams)
This is automatically generated by Lytics and represents the number of streams associated with the user.

Stream Names (_streamnames)

This is automatically generated by Lytics and represents the names of the streams associated with the user.

User is Bot (is_bot)
This is automatically generated by Lytics and represents whether the user has been flagged as a bot or not.

Behavior
The following attributes are all computed in real-time as the profile evolves. Each of the behavioral attributes are sur
 aggregate summary of the user's behavior across various dimensions: Consistency, Frequency, Intensity, Maturity, M

Interests
Lytics Content (lytics_content)
The interest attributes are computed in real-time and represent the user's interest in various topics. These topics are
rest Engine and then associated with the user based upon their interaction with content on your site.

Intelligence
Segment Membership (_segments)
This attribute displays an array of all segments the user is currently a member of. It updates in real-time based on va
gments out of the box, requiring no additional setup. For detailed information on these audiences, refer to our Deve

Split & Split2 (_split & _split2)
These attributes are automatically generated by Lytics and represent a random value evenly distributed across users

Needs Message (needs_message)
This attribute is computed in real-time and represents the relative distance between now and the next predicted eve
ser is likely to engage again.

Next Event (next_event)
This attribute is computed in real-time and represents the next expected event. It is stream specific and is useful for

Lookalike Model Predictions & Lookalike Model Percentiles (segment_prediction & segment_prediction_percentile)
This attribute is computed in real-time and represents the scores resulting from Lytics Lookalike and SegmentML mo
ring no additional setup. For detailed information on these models, refer to our Developer Tier > Models documenta

Activity
General
First Seen & Last Seen (event_first_seen & event_last_seen)
Both of these attributes are automatically populated based upon the _e value in the jstag.send payload. By default Ly
tomatically populate the first_seen and last_seen attributes. Below is an example of collecting a custom event that w

JavaScript

```
jstag.send({
  _e:"custom_event"
});```
```

Channels (channels) [needs update]
JavaScript

```
jstag.send({
  _channel:"web",
});
```

Devices (devices)
JavaScript

```
jstag.send({
  _device:"desktop",
});
```

Hourly (hourly)
This attribute is automatically populated with a count of events per hour for the user.

Hour of Week (hourofweek)
This attribute is automatically populated with a count of events per hour of the week for the user.

Last Active Timestamp (last_active_ts)
This attribute is automatically populated with the last time an event was received in any stream for the user.

Last Channel Activities (last_channel_activities) [needs update]
JavaScript

```
jstag.send({
  _channel:"web",
});
```

Web
Domains (domains)
This attribute is automatically populated with the domains the user has been active on.

First Visit Timestamp (firstvisit_ts)
This attribute is automatically populated with the first time the user visited the site and sends data to the default str

Last Visit Timestamp (lastvisit_ts)
This attribute is automatically populated with the last time the user visited the site and sends data to the default stre

Pageview Count (pageviewct)
This attribute is automatically populated with the number of _pv events recieved for the user.

JavaScript

```
jstag.send({
  _e:"pv"
});
```

Referring Domain (refdomain)
This attribute is automatically populated with the referring domain for the user.

JavaScript

```
jstag.send({
  _ref:"umami.lytics.com",
});
```

User Agent (user_agent)
This attribute is automatically populated based on the user agent of the browser. This attribute must be turned on i

Visit Count (visitct)
This attribute is automatically populated with the number of visits the user has had based on presence of the _sesst

JavaScript

```
jstag.send({
  _sesstart:1
});
```

Visit City (visit_city)
This attribute is automatically populated with the city the user visited from based upon GeoIP.

Visit Country (visit_country)
This attribute is automatically populated with the country the user visited from based upon GeoIP.

Visit Region (visit_region)
This attribute is automatically populated with the region the user visited from based upon GeoIP.

Form Data (form_data)
Form data is a wildcard attribute that allows you to pass a number of key value pairs that all get stored under the fo

s.

JavaScript

```
jstag.send({
  formdata_fn:"John",
  formdata_ln:"Doe",
  formdata_someotherkey:"somevalue"
});
```

Forms Submitted (forms_submitted)

JavaScript

```
jstag.send({
  form_name:"newsletter"
});
```

UTM Campaign Last (utm_campaign_last)

JavaScript

```
jstag.send({
  utm_campaign:"holiday"
});
```

UTM Campaigns (utm_campaigns)

JavaScript

```
jstag.send({
  utm_campaign:"holiday"
});
```

UTM Content Last (utm_content_last)

JavaScript

```
jstag.send({
  utm_content:"recipe-1"
});
```

UTM Contents (utm_contents)

JavaScript

```
jstag.send({
  utm_content:"recipe-1"
});
```

UTM Medium Last (utm_medium_last)

JavaScript

```
jstag.send({
  utm_medium:"article"
});
```

UTM Mediums (utm_mediums)

JavaScript

```
jstag.send({
  utm_medium:"article"
});
```

UTM Source Last (utm_source_last)

JavaScript

```
jstag.send({
  utm_source:"google_ads"
});
```

UTM Sources (utm_sources)

JavaScript

```
jstag.send({
  utm_source:"google_ads"
});
```

UTM Term Last (utm_term_last)

JavaScript

```
jstag.send({
  utm_term:"example"
});
```

UTM Terms (utm_terms)

JavaScript

```
jstag.send({
  utm_term:"example"
});
```

Campaign

Hover (ly_hover) [needs update]

JavaScript

```
jstag.send({
  pf_widget_id: "content-rec-modal",
  pf-widget-event: "hover"
});
```

Impressions (ly_impressions) [needs update]

JavaScript

```
jstag.send({
  pf_widget_id: "content-rec-modal",
  pf-widget-event: "show"
});
```

Closes (ly_closes) [needs update]

JavaScript

```
jstag.send({
  pf_widget_id: "content-rec-modal",
  pf-widget-event: "close"
});
```

Conversions (ly_conversions) [needs update]

JavaScript

```
jstag.send({
  pf_widget_id: "content-rec-modal",
  pf-widget-event: "conversion"
});
```

Milestones (ly_milestones) [needs update]

JavaScript

```
jstag.send({
  pf_widget_id: "engaged-donation-page",
  pf-widget-event: "milestone"
});
```

Goals (ly_goals) [needs update]

JavaScript

```
jstag.send({
  pf_widget_id: "made-donation",
  pf-widget-event: "goal"
});
```

Updated 10 months ago

Default Segments
Suggest Edits
Categorizing users based on their behaviors and characteristics is pivotal for effective audience targeting and persor
erful tool for organizing users into meaningful groups based on shared attributes or behaviors. This section provides
ided out-of-the-box.

Available Segments (Audiences)

Lytics audience segments apply predefined rules to each user profile as they update. Membership in these segments
users enter or exit the segment.

The following audience segments are all available out of the box, with no customization necessary in all Lytics pricin

NameSlugDescriptionDefinition
AllallYour entire user base, both anonymous and known.FILTER *
Anonymous Profiles - 30 daysanonymous_profiles_30_daysAnonymous profiles older than 30 daysFILTER AND (_
anonymous_profiles_30_days
Anonymous Profiles - 60 daysanonymous_profiles_60_daysAnonymous profiles older than 60 daysFILTER AND (_
anonymous_profiles_60_days
Anonymous Profiles - 90 daysanonymous_profiles_90_daysAnonymous profiles older than 90 daysFILTER AND (_
anonymous_profiles_90_days
Anonymous Profilesanonymous_profilesAnonymous ProfilesFILTER AND (_num_aliases = 1, EXISTS '_uids') FROM
Connected Customersconnected_customer_segmentConnected Customer Segment: Users who are active on 2 or
customer_segment
Unhealthy Profilesdefault_unhealthy_profilesAny user profile that is in an unhealthy state. Commonly caused by n
sing_failure = true FROM user ALIAS default_unhealthy_profiles
Behavior: At Risk Usersly_at_riskPeople who's interaction behavior is changing for the worse.FILTER AND (score_
Behavior: Binge Usersly_binge_userPeople who show a lot of activity when they do interact with your brand.FILT
Engagement: Casual Visitorsly_casual_visitorPeople who show little activity when they do interact with your brand
Engagement: Deeply Engaged Usersly_deeply_engaged_usersPeople who show a lot of activity when they do inter
Engagement: First-time Visitorsly_first_time_visitorPeople who are visited from the first time.FILTER visitct = 1
Behavior: Frequent Usersly_frequent_userPeople consistently interacting with your brand.FILTER score_frequen
Campaign Referral Interactions: Emailly_from_emailPeople referred from email.FILTER utm_mediums INTERSECT
Campaign Referral Interactions: Paidly_from_paidPeople referred from paid media.FILTER utm_mediums INTERS
Campaign Referral Interactions: Socially_from_socialPeople referred from social media.FILTER utm_mediums INT
Web Activity: Has Visited Mobile Webly_has_visited_mobile_webPeople who have visited on mobile web.FILTER E
Web Activity: Has Visited Webly_has_visited_webPeople who have visited on web.FILTER channels INTERSECTS ("
Behavior: Infrequent Usersly_infrequent_userPeople not interacting with your brand.FILTER score_frequency < 3
Location: International Visitorsly_international_visitorPeople who have visited outside the US.FILTER AND (EXIST
Email Capture Status: Known Emailly_known_emailPeople who have a known email address.FILTER EXISTS email
Engagement: Moderately Engaged Visitorsly_moderately_engaged_visitorPeople who show average activity when
_intensity < 76)
Behavior: Moderately Frequent Usersly_moderately_frequent_userPeople occasionally interacting with your bran
Web Activity: Multi Session Visitorly_multi_session_visitorPeople who have visited multiple times.FILTER visitct >
Behavior: Perusersly_peruserPeople who visit often but rarely interact deeply with your brand.FILTER AND (score
Engagement: Repeat Visitorsly_repeat_visitorPeople who have visited multiple times.FILTER visitct > 1
Casual Visitorsly_reporting_casual_visitorsPeople who show little activity when they do interact with your brand.
Deeply Engaged Usersly_reporting_deeply_engaged_usersPeople who show a lot of activity when they do interact
Frequent Usersly_reporting_frequent_usersPeople who interact with your brand a lot.FILTER score_frequency > 6
Emailly_reporting_from_emailPeople referred from email.FILTER utm_mediums intersects ("email")
Facebookly_reporting_from_facebookPeople referred from Facebook.FILTER utm_sources intersects ("Facebook"
Googlely_reporting_from_googlePeople referred from Google search.FILTER utm_sources intersects ("Google", "
Paidly_reporting_from_paidPeople referred from paid media.FILTER utm_mediums intersects ("cpc", "ppc")
Socially_reporting_from_socialPeople referred from social media.FILTER utm_mediums intersects ("social", "twit
Has Visited Mobile Webly_reporting_has_visited_mobile_webPeople who have visited on mobile web.FILTER EXIS
Has Visited Webly_reporting_has_visited_webPeople who have visited on web.FILTER channels INTERSECTS ("we
Infrequent Usersly_reporting_infrequent_usersPeople who interact with your brand occasionally.FILTER score_fr
Last Visit Within 3 Monthsly_reporting_last_visit_within_3_monthsPeople who have visited within the last 3 month
Last Visit Within A Dayly_reporting_last_visit_within_dayPeople who have visited within the last day.FILTER lastvis

Last Visit Within A Monthly_reporting_last_visit_within_monthPeople who have visited within the last month.FILT
Last Visit Within A Weekly_reporting_last_visit_within_weekPeople who have visited within the last week.FILTER la
Multi Session Visitorly_reporting_multi_session_visitorPeople who have visited multiple times.FILTER visitct > 1
Single Page Visitorly_reporting_single_page_visitorPeople who have only visited one time.FILTER pageviewct = 1
Web Activity: Single Page Visitorly_single_page_visitorPeople who have only visited one time.FILTER pageviewct =
Email Capture Status: Unknown Emailly_unknown_emailPeople who do not have a known email address.FILTER N
Location: US Visitorsly_us_visitorPeople who have visited from the US.FILTER visit_country IN ("US")
Browser / OS: Androidly_uses_androidPeople who have used Android.FILTER devices INTERSECTS ("Android")
Browser / OS: Desktoply_uses_desktopPeople who used a desktop.FILTER devices INTERSECTS ("desktop")
Browser / OS: iOSly_uses_iosPeople who have used iOS.FILTER devices INTERSECTS ("IOS")
Browser / OS: Mobilely_uses_mobilePeople who have used a mobile device.FILTER devices INTERSECTS ("Androi
Browser / OS: Otherly_uses_otherPeople who have used other devices.FILTER devices INTERSECTS ("Blackberry"
Lytics Currently Engagedsmt_activeUsers who are currently engaging with your brand.FILTER AND (score_mome
requency <= 5, score_intensity == 0, score_momentum == 0, score_quantity <= 3), NOT AND (score_quantity >= 50, s
) FROM user
Lytics Disengagedsmt_dormantUsers who show minimal or no activity for a prolonged period of time.FILTER AN
0, score_quantity <= 3), EXISTS score_momentum, _created < "now-1w") FROM user
Lytics Previously Engagedsmt_inactiveUsers who are currently disengaged with your brand, but had been previou
d < "now-1w", NOT AND (score_frequency <= 5, score_intensity == 0, score_momentum == 0, score_quantity <= 3))
Lytics Newsmt_newUsers who are new to your audience within the last week.FILTER _created >= "now-1w" FROM
Lytics Highly Engagedsmt_powerUsers who engage most frequently and consistently of your users.FILTER AND (
5, score_momentum >= 40), EXISTS score_momentum, _created < "now-1w", NOT AND (score_frequency <= 5, score
um > 10) FROM user
Lytics Unscoredsmt_unscoredUsers who have not registered enough activity to be scored by our behavioral algori
Updated 6 months ago

Lead Capture
Suggest Edits
TL;DR
This document outlines how to leverage Lytics' real-time personalization engine to identify visitors who lack the stro
with other activation channels such as email.

Background
What is lead capture?
Traditionally, lead capture involves gathering information from individuals interested in your products or services, s
hen people visit your website, subscribe to your newsletter, download resources, or interact with your content. How
consumer engagement strategy has undergone significant transformation.

Why is it important?
Accurate measurement of attribution and conversions is paramount to assessing the effectiveness of your marketin
With the challenges posed by the deprecation of third-party cookies, particularly impacting top-of-funnel ad campaig
strategy.
In an era of short attention spans, every interaction must be hyper-relevant and efficient, making lead capture instr
As marketing budgets face constraints, each dollar spent must yield maximum potential, and lead capture aids in op
Building comprehensive consumer profiles representing behavioral patterns over time is essential to get the most o
See it in action.
Lytics' real-time personalization engine lets you first identify the current web visitor, programmatically review their p
red to their browser to close gaps in that profile.

Instructions
Below, you'll find a detailed guide on how to execute this use case. At the end, you'll find additional reading, which w
further.

Requirements
Have access to an active Lytics account.
Ability to add JavaScript to your website via tag manager or CMS.
Entry-level knowledge of JavaScript. (Don't worry; it is mostly "copy and paste" here.)
Install Lytics Core SDK

Before executing this use case, your website must be properly configured with the core Lytics SDK (JavaScript tag). Pl
is present before continuing.

Activate Required Attributes
As an admin user of Lytics, you can enable or disable any attributes from being surfaced to the web via our JavaScrip
y need to allow some of the required attributes for this particular use case.

Required Attributes:

Attribute
anonymous_profiles This computed attribute, available by default in all accounts, represents visitors who do not yet
known_profiles This computed attribute, available by default in all accounts, represents visitors with strong identifie
Configure Web Experience
To execute this use case, we will launch a simple lead capture form at the bottom left of your site. The lead capture w
generic "dark" theme along with some boilerplate messaging. For best results, we recommend leveraging an offer o
"sign up" and identify themselves. In return, you'll gain much knowledge about this visitor, strengthen your consume
of just the web.

JavaScript

```
<script type="text/javascript">
 jstag.on('pathfora.publish.done', function(topic, event){

   var module = new pathfora.Form({
     id: 'lead-capture-form',
     layout: 'slideout',
     theme: 'dark',
     headline: 'Sign up!',
     msg: 'Submit this form to get updates',
     formElements: [
       {
         "type": "email",
         "required": true,
         "label": "Email",
         "name": "email"
       }
     ]
   });

   var modules = {
     target: [{
       segment: "anonymous_profiles",
       widgets: [module]
     }]
   };

   pathfora.initializeWidgets(modules);
 });
</script>
```

Bonus Idea
You can extend this use case to progressively improve your visitor profiles by surfacing data capture forms specific t
wn, only ask for email. As soon as you have an email, perhaps you want to know more about their preferences or lea

Configure Reporting
The Lytics platform has a pre-defined schema to facilitate this use case. As such, we recommend building a custom r
nknown or anonymous visitors to known visitors with a strong identifier. There are many ways to configure this type
measure impact.

Create New Report
Add Anonymous vs. Known "Size" Component
Step 1: Once you have created your new report, add a component using the "+ Add New Component" button at the t

Step 2: Select "Size" as your component type.

Step 3: Name your component. We recommend something simple like "Anonymous vs. Known".

Step 4: Add an optional description to explain the goal of this report to ease the consumption for others later.

Step 5: Select the audiences you'd like to highlight. In this use case, we'll select "Anonymous Profiles" and "Known Pr

Step 6: Save your component. Please note it may take some time for the report to populate once you have configure
are good to go.

Add Impression "Composition" Component
Step 1: Following steps similar to the previous component, we'll add another component, but this time, we use the "C

Step 2: Name your component "Campaign Impressions," as this component will focus on showcasing impression info

Step 3: Select the "All" audience to ensure all visitors, regardless if they are known or unknown, are included in the re

Step 4: Select the field "ly_impressions." This field represents an array of all campaigns each visitor has interacted wi
om campaigns will match the "ID" you set above in the campaign configuration.

Step 5: Finally, replace "my_campaign_id" in the example below with the ID of your campaign above to highlight only

Add Conversion "Composition" Component
Following the same steps as above, configure another "Composition" component, but this time, use the field "ly_con
onverted on instead of the impressions used previously.

Thats it. Your report has been configured. As you begin to gain impressions and conversions, this report will populat

Bonus!
Get additional guidance on how to pass interaction information related to your campaign to the following common s

Google Analytics [coming soon]
Custom BI via Data Warehouse [coming soon]
Execute Your Experience
Once you have configured and tested your Experience, activation is as simple as publishing the JavaScript code to yo
er or using another mechanism such as Drupal blocks or WordPress.

Updated 10 months ago

Content Recommendations
Suggest Edits
TL;DR
This document details the process of utilizing Lytics' real-time personalization engine to showcase content that reso
ly inline or through a pop-up modal on your website to boost engagement.

Background
How does Lytics make content recommendations?
Lytics Interest Engines provides a sophisticated approach for businesses to gain and leverage insights into which co

is is achieved through a detailed enrichment and affinity generation process in real-time. While full details are availal
can be distilled into four key steps:

Tracking Interactions: Monitoring visitor behavior in real-time to understand their engagement with the site.
Content Analysis & Topic Extraction: Using Google NLP and proprietary algorithms, Lytics automatically analyzes all t
graph.
Interest Scoring: Assigning scores to reflect a visitor's level of interest in different topics, updated dynamically as new
Content Recommendation: Suggesting content that aligns with the visitor's demonstrated interests, leveraging real-t
This streamlined framework enables real-time personalization, enhancing user experience by continuously adapting

Why is it important?
Relevant content for individual users boosts marketing effectiveness and ROI by increasing engagement and convers
etter resource utilization and higher customer retention. This targeted strategy enhances sales opportunities and br

See it in action.
Lytics' real-time personalization engine lets you first identify the current web visitor, programmatically review their p
heir unique interests to maximize engagement.

Instructions
Below, you'll find a detailed guide on how to execute this use case. At the end, you'll find additional reading, which w
further.

Requirements
Have access to an active Lytics account.
Lytics account must have had enough time to build the topic graph. Typically, 24 to 48 hours.
Ability to add JavaScript to your website via tag manager or CMS.
Entry-level knowledge of JavaScript. (Don't worry; it is mostly "copy and paste" here.)
Install Lytics Core SDK
Before executing this use case, your website must be properly configured with the core Lytics SDK (JavaScript tag). Pl
is present before continuing.

Interest Scores & Content Collections
Your content must be classified before Lytics can offer content recommendations or insights. Typically, this classifica
r catalog is particularly large. To ensure the health of your content graph and interest engines, there are a few key ar

Verify Interest Scores on Profile
Ensure the Lytics Developer Tools Chrome extension is installed and Enabled.
Visit the domain(s) that have the Lytics JavaScript SDK installed.
Open the Chrome extension and navigate to the Profile section at the bottom.
From the Summary tab, you will see a section labeled Interests. Here, we will list any topics and their associated leve
available," proceed to the next step to ensure content has been classified.
Verify Content has Been Classified
▯
If you have not already verified the quality of classification and metadata, please refer to our quickstart documentati

From the Lytics interface, navigate to Decision Engine from the product switcher at the top left.

Using the left-hand menu, navigate to Content > Collections.

From the list of collections, there is likely only one; look for All Content in the list and the rows Size. This refers to the
han one and reflect your total catalog.

For greater detail, you can also visit Content > Web Classification.

At the top of that page will be a summary dashboard of all content that has been successfully classified and cataloge
onent.

Troubleshooting Common Problems
I have no lytics_content_enrich stream. (coming soon)
My content is not showing up at all. (coming soon)
My content is being classified, but none of my documents have images. (coming soon)
Select a content collection.
We will use the default collection outlined below for this exercise, but you may also create a custom collection with a

Collection	Description
all_content	This collection contains all classified documents. It comes out of the box in all Lytics accounts.

Ready to go a step farther and build a custom collection of your content to ensure recommendations are selected fr
on.

Activate Required Attributes & Segments
As an admin user of Lytics, you can enable or disable any attributes from being surfaced to the web via our JavaScrip
y need to allow some of the required attributes for this particular use case.

Required Attributes:

Segment	Description
all	We will use the out-of-the-box segment containing all your site's users for demonstration. We recommend using
itors.
Configure Web Experience
To execute this use case, we will demonstrate two examples. The first will be a single content recommendation in a p
a set of recommendations inline to your website.

Example 1: Content Recommendation Modal

JavaScript
HTML

```
jstag.on('pathfora.publish.done', function(topic, event){
  var module = new pathfora.Message({
    id: 'content-rec-sample',
    layout: 'slideout',
    theme: 'dark',
    headline: 'Yummy content!',
    msg: 'We suspect you are going to want to check this out.',
    recommend: {
      collection: 'all_content'
    },
    cancelShow: false,
    okShow: false,
    variant: 3
  });

  var modules = {
    target: [{
      segment: "all",
      widgets: [module]
    }]
  };

  pathfora.initializeWidgets(modules);
});
```

Example 2: Inline Content Recommendation
In this example, we'll use a generic Drupal Block with pure HTML and CSS, but the same approach can be taken usin

HTML

```
<style>
   .rec-container {
      display: flex;
      justify-content: space-between;
      width: 100%;
   }

   .rec-item {
      box-sizing: border-box;
      flex: 1;
      padding: 10px;
   }

   .rec-title,
   .rec-description {
      font-size: 14px;
      margin-bottom: 5px;
      word-wrap: break-word;
   }

   .rec-description {
      font-size: 12px;
   }

   .rec-img {
      height: auto;
      margin-bottom: 5px;
      max-width: 100%;
   }
</style>
<div class="rec-container">
   <div class="rec-item" data-pfblock="lytics-recommend" data-pfrecommend="all_content">
      <div class="rec-title">
         <a data-pftype="URL"><strong data-pftype="title">Recommendation title loading...</strong></a>
      </div>
      <p>
         <img class="rec-img" alt="Recommendation related image">
      </p>
      <p class="rec-description" data-pftype="description">
         The recommendation description is loading...
      </p>
   </div>
   <div class="rec-item" data-pfblock="lytics-recommend" data-pfrecommend="all_content">
      <div class="rec-title">
         <a data-pftype="URL"><strong data-pftype="title">Recommendation title loading...</strong></a>
      </div>
      <p>
         <img class="rec-img" alt="Recommendation related image">
      </p>
      <p class="rec-description" data-pftype="description">
         The recommendation description is loading...
      </p>
   </div>
   <div class="rec-item" data-pfblock="lytics-recommend" data-pfrecommend="all_content">
      <div class="rec-title">
         <a data-pftype="URL"><strong data-pftype="title">Recommendation title loading...</strong></a>
      </div>
      <p>
```

<img class="rec-img" alt="Recommendation related image">
</p>
<p class="rec-description" data-pftype="description">
The recommendation description is loading...
</p>
</div>
</div>
Updated 10 months ago
What is Vault?
Suggest Edits
Introduction
Vault is a centralized hub for managing security and other administrative features in Lytics. It provides a single place
atures and user permissions, regardless of product. This means that the controls set in Vault apply to Conductor, De
ith your Lytics account.

Take a quick tour of Lytics Vault.

Navigating Vault
Vault is comprised of the following sections:

Account Usage - an overview of your general account quota usage related to event consumption.
Account Settings - view and change necessary administrative settings and details of your account. These are sectione
Account Details
JavaScript Tag
Lytics API
Content
Security
Schema
Users - view a list of users accessing your Lytics account, change their details or permissions, remove a user, or invite
Security
Access Tokens - view and manage a list of Lytics API access tokens. New tokens can be provisioned with specific perr
Authorizations - create, edit, view, and delete authorizations within Lytics. Authorizations are credentials to third par
ta import and export jobs to run.
Account Setup
JavaScript Tag - learn how to install the Lytics JavaScript tag and validate the installation.
Who can access Vault?
Vault is focused primarily on account admins or those that have permission to administer settings, user access, etc. I
and all sections outlined above may not be available.

If you are unable to access a section please reach out to your account administrator to request those adjusted perm

In general, Admins will be able to access all areas. Data Managers, Campaign Managers, Experience Managers, and C
dentials for their jobs and experiences. Finally, all Lytics users, regardless of role, should have access to view the Java
should be able to view their user profile where they can change details such as their Name, Email Address, Phone N
our user profile will be accessible under the main Lytics navigation under "Manage My Profile."

Notable Changes
For existing customers, slight changes will impact your day-to-day management activities.

Product Switcher
Vault will be available directly from the primary product switcher at the top left of your Lytics interface. This will be y
n.

Account Usage
Our account usage data and quota meters received a much-needed facelift. The usage metrics act as the Vault "dash

Account Usage Chart

Account Settings

Account setting sections are now accessible through the main navigation. These settings have received a minor facel
htly updated for a more standard user experience. In addition, users are now prompted to save or discard their char

Users
The user list is now sortable and filterable based on name, email, who invited them, and how long they've been a Lyt
n Vault, in addition to assigning new roles, an administrator can edit any user's name and email address.

The user invite form is now on its page to improve the flow and experience of inviting users. Roles are now sorted in
as access to everything, while custom roles give a finer-grain definition of what the user can access. The details on ea
ame.

Access Tokens
The access tokens list is now sortable and filterable based on the name, description, the creator of the token, or whe
the access tokens you've already created, such as the roles assigned, when it was made, and when it will expire. In ac
th any combination of more granular access roles.

Authorizations
Authorizations are now to be created and updated only in Vault. You will still be able to utilize the auths you create in
ob in Conductor or Decision Engine, if you don't see an authorization you want to use for that job, you will be linked
.

JavaScript Tag Installation
This page remains unchanged, with simple styling changes and updated links to our documentation for troubleshoo

Updated over 1 year ago
Accessing Accounts
Suggest Edits
Introduction
Under the account menu in the main navigation, find the Account Settings option.

You should see your account information, such as the name of your account, domain, the account owner's email, an

You can edit your account name, domain, and primary contact email from this page anytime. Once you change one o

Account ID and account number are never editable. They are assigned at account creation and are permanent identi

Navigating Accounts
For users who have access to multiple accounts, you can quickly and securely navigate between Accounts using our a

1. Click "Switch Account"

2. Select Account
A menu will appear outlining the accounts you have access to. Simply select an account and a new tab will open with

Updated over 1 year ago
Monitoring Metrics and Alerts
How to monitor Lytics, and alert when help is needed.

Suggest Edits
Monitoring
Monitoring and alerting is available on every job and every authorization within Lytics.

To set up alerting on your jobs or authorizations, you can set up a monitoring job from either the Job API or the Lytic
ail.

If a source or destination job has failed, Lytics will show the latest error message on the Conductor Diagnostics Dash
interface, and allow the job to be restarted if needed. The most detailed information for troubleshooting can be acc

Additional generic monitoring on the Lytics system is available on our status page at lytics.statuspage.io.

Updated 10 months ago
Job Alerts
Monitor and alert on your import and export workflows

Suggest Edits
As systems are updated, permissions change, and networks are reconnected, sometimes situations will be encounte
tion built into Lytics Jobs. Lytics provides alerting through Slack, Microsoft Teams and email on import and export Job

Job Alerting Channels
Slack
Microsoft Teams
Email Alerting (Lytics Monitoring)
Keep in Mind!
Alerts can be configured for specific workflows, or for all workflows running in the account.
Consider having one general alert to an Operations Channel or Team for all alerts, or alerts for specific workflows m

Consider which statuses to include
Alerts can be configured for statuses aside from failures. Workflows like critical batch import workflows can send a c

Understanding errors
If a source or destination job has failed, Lytics will show the latest error message on the Conductor Diagnostics Dash
interface, and allow the job to be restarted if needed. The most detailed information for troubleshooting can be acc

Updated 10 months ago

Monitoring Audit Logs
Suggest Edits
Account Activity Monitoring via Audit Logs API
Audit Logs provide visibility into system changes such as creating segments, updating schema, deleting items, new a
audit data about changes in your account. These events are shown in many places inside Lytics, such as the history
g authorization, or password changes on the source for OAuth tokens. See our System Events API documentation fo

Updated 10 months ago
Exporting Audit Logs or Alert Jobs
Suggest Edits
Lytics System Events: Audit Logs and Alerts
In Lytics, audit logs and system alerts originate from a shared source: Lytics System Events. A System Event is simply
ser creating a job, segment, or role, or an error message indicating a job failure.

Export vs. Alert
Log Export: This is a job that either streams logs in real time or performs a batch export to an external source, such a
Log Alert: Alerts are triggered based on specified conditions and notify users when certain actions occur within the s
In both cases, the content of exports or alerts depends on the filters you set up. Filtering is typically done using the S
tion taken on the subject, like created, updated, deleted, or failed).

Creating an Audit Log export (aka System Alert) Job via the UI
Creating a job to export your Audit and System Event logs is like creating any other job; for more information, see Da
ogs to create an export of your Audit logs or System Events.

Depending on your Provider, you can then select to export System Events.

For example, if you selected Google Cloud and you want to export the events to BigQuery.

Then, you'd want to select the BigQuery: Export System Events Job-Type tile. After choosing the Job-Type, it's like con
n do a one-time or continuous export.

Creating an Alert based on System Events
Creating a job to alert on an Audit and System Event logs is like creating any other job; for more information, see Dat
ogs to create an export of your Audit logs or System Events.

Depending on your Provider, you can then select to export System Events or Email Alerts.

For example, if you select to get an email when an Alert is triggered, then use Lytics as your provider and select Emai

Then configure what Subject you wanted to listen too and what Event Types (aka Verbs).

Filtering Audit logs
Audit logs can be filtered by

Subject Type: what the event is about, such as work, workflow, user, campaign. See the list of subject types below.
Subject ID: identifier of a subject, such as work ID, workflow ID, campaign ID, etc.
Verb: action described by the event performed on a subject. See the list of available verbs below.

Verb	Description	Frequency
synccomplete	For the completion of one synchronization cycle. Emitted when a work cycle finishes successfully. Thi sync or when there is a sleep cycle.	Real-time
update	For when work configuration is modified. It may occur multiple times per work.	Real-time, batch
created	For when works are created. This only occurs only once per work.	Real-time, batch
deleted	For when a work is deleted.	Real-time, batch
synced	For the completion of one sync unit (multiple units may happen per sleep cycle).	Real-time
completed	For the final successful completion of a work. This occurs once per work.	Batch
started	For the first time, work is started. This occurs once per work.	Real-time, batch
failed	For the final failure of a work. This occurs once per work unless work is bounced.	Real-time, batch
syncing	For the start of a series of sync cycles for a work.	Real-time

Subject Type	Description
account	Represents account-related actions or changes.
auth	Refers to authentication events, including 3rd party access control activities with service accounts.
user	Actions related to user accounts, such as creation, update, or deactivation.
campaign	Actions or modifications related to marketing campaigns.
data	Covers data management events, such as data ingestion and updates.
entity	Refers to actions involving user entities aka Profiles.
experience	Actions associated with experience.
journey	Pertains to events tracking customer journeys and related updates.
program	Events involving the creation or modification of programs within the system.
provider	Refers to data provider configurations or integrations.
query	Covers actions involving Lytics queries.
report	Refers to generation, access, or modification of Lytics reports.
rollup	Involves aggregation events, such as data roll-ups for analytics.
schema	Actions associated with data schema configuration and updates.
schematable	Refers to operations involving schema tables or data structure definitions.
scoring	Covers actions involving user scoring mechanisms within the system.
segment	Events related to segment creation, modification, or deletion.
segmentcollection	Refers to collections of segments and associated actions.
segmentml	Involves machine learning (ML) processes related to segment analysis.
stream	Actions or updates related to a Lytics stream.
subscription	Events involving subscriptions, such as subscription creation or cancellation.

topic-document	Refers to topic modeling or document processing events.
variation	Refers to A/B testing or variation setup within experiences or campaigns.
work	Covers general work-related actions or tasks within the system.
workflow	Actions associated with workflow creation, modification, or execution
Job Status Monitoring via Webhooks
Job-status events can be observed by creating a webhook subscription that POSTs data (or JSON) to a specific URL. T
ownstream for your monitoring use cases. Some common examples include listening for audience exports created/u
a given integration fails.

Work related filters
For events related to the subject type work, the following verbs may be emitted:

synccomplete - Emitted when a sync operation is completed.
updated - Emitted when the job configuration is modified.
created - Emitted when a new job is created.
deleted - Emitted when a job is terminated.
synced - Emitted when the job sync operation completes.
completed - Emitted when a job has finished successfully.
started - Emitted when a job begins execution.
failed - Emitted when a job encounters an error.
syncing - Emitted while a job is actively syncing.
Building custom Alerts/Exports using our Webhook Integration
Overview
Lytics provides a webhook integration that allows you to monitor and react to system events in real-time. This integr
actions, and maintain synchronization with your other systems based on events occurring within Lytics.

Configuration Examples
Basic Webhook Setup
The following example shows how to subscribe to multiple event types and send them to a webhook endpoint:

JSON

```
{
  "config": {
    "system_event_multiple_types": ["updated", "created", "failed"],
    "webhook_url": "YOUR_WEBHOOK_ENDPOINT",
    "headers": {
      "custom-header": "header-value"
    }
  },
  "workflow": "webhook_system_events"
}
```

Slack Integration
You can integrate Lytics system events with Slack using a custom JSON template. This example shows how to send fa

JSON

```
{
  "config": {
    "system_event_type": "failed",
    "webhook_url": "YOUR_SLACK_WEBHOOK_URL",
    "json_template": "local note = if std.objectHas(event.data, \"notes\") then event.data.notes else \"A work failed\";
e info go to: https://activate.getlytics.com/data/integrations/work/%s?aid=%s\" % [event.data.subject_id, event.data.a
  },
  "workflow": "webhook_system_events"
}
```

Advanced Filtering
You can filter events by source type and ID using the system_event_sources configuration:

Filter by Specific IDs

JSON

```
{
   "config": {
      "system_event_multiple_types": ["updated", "created", "failed"],
      "system_event_sources": {
         "work": [
            "work-id-1",
            "work-id-2"
         ]
      },
      "webhook_url": "YOUR_WEBHOOK_ENDPOINT",
      "headers": {
         "custom-header": "header-value"
      }
   },
   "workflow": "webhook_system_events"
}
```

Monitor All Events of a specific Verb Type

To receive events for all works in your account, use an empty array.

JSON

```
{
   "config": {
      "system_event_multiple_types": ["updated", "created", "failed"],
      "system_event_sources": {
         "work": []
      },
      "webhook_url": "YOUR_WEBHOOK_ENDPOINT",
      "headers": {
         "custom-header": "header-value"
      }
   },
   "workflow": "webhook_system_events"
}
```

Best Practices

Ensure your webhook endpoint can handle the expected volume of events
Implement proper error handling and retry logic in your webhook receiver
Use HTTPS endpoints for secure data transmission
Monitor webhook delivery success rates and implement appropriate alerting

Support

For additional assistance or questions about webhook integration, please contact Lytics support or consult our API d

Updated 2 months ago

Monitoring Metrics

Suggest Edits

Introduction

Lytics provides a variety of valuable metrics that downstream monitoring tools, such as Google Stackdriver or New R
t for alerting and monitoring, you can have visibility into Lytics within your existing ecosystem.

Consuming Metrics Downstream

Once you have connected Lytics to your monitoring tool, there are various ways you can apply metrics from Lytics to
examples:

Active monitoring - defined by alerting, requires additional configuration within your downstream tools to monitor L
On-call distribution lists - control who within your operational teams to inform.
Quiet hours - manage within a tool where you are already doing that for other metrics.
Correlation of metrics - show existing metrics (e.g., website performance) in the context of Lytics metrics.
Operational users - watch for signals without creating a Lytics admin user account.

Anomaly detection - use threshold-based alerts that most monitoring tools have that go beyond the capabilities Lytic
Platform Monitoring via Metric API
The Metric API provides access to a variety of metrics that are recorded in the Lytics platform. This API allows you to
ny workflow-specific metrics.

Heartbeats: metrics with a value of 1 for "up & healthy" and 0 for "not healthy" (or missing).
NameDescriptionUpdated
monitoring_heartbeatA simple 1 (up) for each minute a workflow runs indicates the overall integrations platform.
collection_countA metric for the count (gauge) for the 1-minute window in total events ingressed (web collection or
stream_countMetric per stream for a count of events seen this cycle.Every hour
*Availability of Metrics: the Lytics Metric API and all Lytics export workflows run inside Lytics' work runtime system in
es can move between servers, potentially resulting in 1 or 2-minute gaps in metrics. Therefore, alerts on single heart
ndow of 5.

Updated 3 months ago
Usage Metrics
Suggest Edits
Account Usage Metrics
The Account Usage section shows how many inbound and outbound events Lytics has received for your account. If y
ng how much of your inbound event quota you have used for each quota period.

In the Lytics UI, select Vault from the product switcher. Or, if you are already in Vault, select Usage from the main me

This view offers a quick way to gauge the quantity of data Lytics has received from your various Sources. Of course, i
ou can view more granular details of all connected Sources from the Conductor interface.

Inbound Events
An inbound event is a record of activity collected or uploaded to Lytics from a customer data source, such as a recor
ber record. The inbound events graph shows your total inbound events, which can be displayed daily, weekly, or mo

The inbound quota meter displays the number of events recorded in the quota period, your quota limit, and the me
term accounts, quota periods begin on the first of each month and end on the last day of the month. For annual ter
ption. Quotas (unless otherwise stated in your contract) only count for production accounts.

Monitoring the Inbound Event Quota
Automated alerts for Inbound Event Quotas can be configured to sent to Microsoft Teams, Slack, or directly to an em

Outbound Events
An outbound event is any record of data exported from Lytics, whether manually or automatically. The outbound ev
aily, weekly, or monthly.

Updated 10 months ago

Managing Users
Suggest Edits
Managing Your User Profile
To access your profile, click "Manage My User" from the account menu at the bottom of the primary navigation.

You'll have access to personal information and usage statistics from the resulting profile page. It doubles as an ID ca

user profile
You can edit your name and email address. Both fields are required. A phone number is only required for 2FA.

Click the "Change Password" button to change your password.

Resetting Passwords
The password must be reset by the user whose password is being reset. Passwords cannot be reset on behalf of oth

To reset your password, go to Manage My Profile in the account menu and click the Change Password button.

A modal will open, prompting for a new password can be entered.

change password

Changing a password will immediately invalidate all current sessions across all machines for the user.

Managing Account Users
Click "Manage Users" in the account menu to manage account users.

manage users menu
Modifying User Permissions
User roles define the amount of access and permissions a Lytics user has when logged in and through the Lytics APIs

vault roles
A user may have any number of these roles, and the permissions for multiple roles are additive. For example, a user
ess to all permissions granted by both roles.

Users with the Admin role can control other users' roles within your organization via the "Manage Users" option fror

Managing Personally Identifiable Information
You can indicate any user fields in your account that contain Personally Identifiable Information (PII) via the private f
e who does not have Admin, Data Manager, or User Search roles. You should verify with Lytics Support that the field
sure these fields are hidden there.

What does a user of each role have access to?
A user's role determines which parts of the Lytics app they can access. Here is a breakdown of what is shown in the r

	Admin	Audience Manager	Campaign Manager	Content Manager	Data Manager	Discovery Insights	Experience M				
Dashboard											
Dashboard	x	x	x	x	x	x	x	x	x	x	x
Goals											
Goals	x							x			
Experiences											
Experiences	x						x	x			
Audiences											
Audiences	x	x	x			x	x	x	x	x	
Discovery	x					x					
User Search	x				x						x
User Profiles	x				x						x
GDPR Profile Delete	x				x						
Content											
Overview	x		x	x	x						
Topics	x		x	x	x						
Collections	x		x	x	x						
Data											
Jobs / Auths	x		x		x		x	x			
Data Streams	x				x						
User Fields	x				x						
Queries	x				x						
Schema Audit	x				x						
Personalize	x		x						x	x	
Look-a-like Models	x										

For access to look-a-like models you will need to be an account admin or have a combination of Discovery Insight + a

What tasks can a user of each role perform?
Roles define a set of permissions the user has, which also dictates what actions they can take in the app and through
by feature.

Personally Identifiable Information (PII)
To shield PI from users who should not have access, you will need to use the private fields account setting to mark th
Admin, Data Manager, or User Search roles.

Admin□Audience Manager□Campaign Manager□Content Manager□Data Manager□Discovery Insights□Experience M
View□x□□□□x□□□□□□□x
Audiences (without PII)
Admin□Audience Manager□Campaign Manager□Content Manager□Data Manager□Discovery Insights□Experience M
View□x□x□x□□□□x□x□x□x□
Create□x□x□x□□□□x□x□x□□
Edit□x□x□x□□□□x□x□x□□
Duplicate□x□x□x□□□□x□x□x□□
Delete□x□x□x□□□□x□x□□□
Content Topics
Admin□Audience Manager□Campaign Manager□Content Manager□Data Manager□Discovery Insights□Experience M
Blocklist□x□□□x□□□□□□□
Content Collections
Admin□Audience Manager□Campaign Manager□Content Manager□Data Manager□Discovery Insights□Experience M
View□x□□x□x□x□□□□□
Create□x□□x□x□□□□□□
Edit□x□□x□x□□□□□□
Duplicate□x□□x□x□□□□□□
Delete□x□□x□□□□□□□□
Authorizations (for imports & exports)
Admin□Audience Manager□Campaign Manager□Content Manager□Data Manager□Discovery Insights□Experience M
View□x□□x□□x□□x□x□□□
Create□x□□x□□x□□x□x□□□
Edit□x□□x□□x□□x□x□□□
Delete□x□□x□□x□□x□x□□□
Jobs (imports & exports)
The former "Integrations" tab is now comprised of the "Jobs" and "Authorizations" sections, which allow you to mana

Admin□Audience Manager□Campaign Manager□Content Manager□Data Manager□Discovery Insights□Experience M
View□x□□x□□x□□x□x□□□
Create□x□□x□□x□□x□x□□□
Pause□x□□x□□x□□x□x□□□
Update□x□□x□□x□□x□x□□□
Delete□x□□x□□x□□x□x□□□
Accounts & Users
Admin□Audience Manager□Campaign Manager□Content Manager□Data Manager□Discovery Insights□Experience M
Invite User□x□□□□□□□□□□
Manage User Roles□x□□□□□□□□□□
Create Account□x□□□□□□□□□□
Edit Account□x□□□□□□□□□□
View Account Usage□x□□□□□□□□□□
Personalize Campaigns
Admin□Audience Manager□Campaign Manager□Content Manager□Data Manager□Discovery Insights□Experience M
View□x□□x□□□□□□x□x□
Create□x□□x□□□□□□x□□
Edit□x□□x□□□□□□x□□
Duplicate□x□□x□□□□□□x□□
Delete□x□□x□□□□□□□□
Additional API-Only Features
All roles have API read access to topic rollups, segment collections, and SegmentML. Marked below are the roles with

Admin□Audience Manager□Campaign Manager□Content Manager□Data Manager□Discovery Insights□Experience M
Content Topic Rollups□x□□x□x□x□□□□□
Content Classification□x□□x□x□x□□□□□
Queries API□x□□□□x□□□□□
Segment Collections□x□x□x□□□x□x□x□x□x□

Lookalike Models□x□□x□□□□□□□
Subscription□x□□x□□x□□□□□□
Inviting Users
Click the Create New button from the user list to invite a new user to the account.

vault invite user
Inviting a new user will prompt for an email address and roles to select the appropriate level of access the user will h
e new user will get an email with a link that will take them to the Lytics account login screen.

Removing Users
From the user list, select the user you wish to delete. You can remove this user from Lytics by clicking the Delete Use

Updated over 1 year ago
Single Sign-On
Suggest Edits
□
Lytics supports Single Sign-On (SSO) by using Google Cloud Identity Platform as a service provider using SAML protoc
y that the Service Provider (SP) initiates SSO. IDP-initiated SSO has been deprecated and is no longer supported by Ly

Overview
Single Sign-On (SSO) allows employees to safely and securely access a host of Internet tools with a single username a
ould consider leveraging Single Sign-On:

SSO helps the end user. Implementing SSO means employees are required to commit just one password to memory
nique and secure password without writing it down. SSO reduces password fatigue and frustration and makes the en

SSO benefits the company. Fewer passwords to remember equals fewer calls to the helpdesk, resulting in more time
e helpdesk (which is oftentimes outsourced) means a reduction in cost to the company as well.

SSO improves security. When employees are required to remember numerous passwords, it is easy to fall into lazy h
ore susceptible to hacking. Or writing passwords down on Post-it notes where they can easily be stolen or fall into th

SSO helps with compliance. SSO helps companies increase control over the user's access to certain information as w
er for organizations to comply with HIPAA, SOX, and other regulatory groups.

SP-Initiated SSO
Lytics supports enterprise Single Sign-On (SSO) by using Google Cloud Identity Platform as a service provider using S
n such a way that the Service Provider (SP) initiates SSO.

Once implemented, users will log in to Lytics via a special SSO form that only requires an email address. Lytics will re
 to complete the login. Once the IdP verifies credentials, the pop-up will close, redirecting the user to a logged-in inst
er's IdP will communicate with the Lytics APIs, which use Google Cloud Identity Platform to validate the login. This do
at uses SAML.

Service Provider Configuration
To configure SAML for the Lytics service provider, some information is required about your IdP. If you have a metada
opriate, but please ensure that the following information is provided to Lytics Support:

Entity ID
Sign In URL
X509 Signing Certificate
Further configuration details, such as mappings, may need to be provided, but the Lytics implementation only requir
 been received, Lytics can configure the SAML connection in the Google Cloud Identity Platform.

IdP Configuration
After Lytics configures the SAML connection on the service provider, Lytics Support will provide the following key fiel
n in their IdP.

Assertion Consumer Service (ACS) URL (aka postback or callback URL)
Entity ID of the Service Provider

Sign-in URL
With this information, your IdP connection can be configured to complete the SSO integration.

At this time, Lytics does not support providing this information in an XML metadata file. Additional information abou

Testing SSO
Once all the information has been configured in both the IdP and the Lytics service provider, you can test and verify
SSO as your only sign-in method, please disable any password restriction or expiration settings that may have been

During the testing process, Lytics can be configured to allow both SSO login and regular username and password (or
without disrupting the day-to-day usage of the app.

If requested, once the SSO implementation has been tested and verified, Lytics can disable the use of other login typ

Troubleshooting SSO
If it's known that SSO will be added to an account, the user email addresses added to the account should match the
match, the login will fail as Lytics will not be able to verify that there is a user with that email address.

For instance, if the email listed in the IdP is abc@123 and within Lytics, it is def@456, then there will be potentially mu
O form on Lytics.

If the user enters abc@123 into the IdP pop-up, it will immediately fail as we use the Lytics account user to determin
the following:

SSO Error State

However, should the user enter def@456 (their Lytics account email), they will be redirected to their IdP, but the veri
to Lytics.

To remedy this situation, you would need to create a new user within Lytics with the email address abc@123 for the
or an account using the Managing Users guide as a reference.

Lytics Support can assist in the troubleshooting process. When testing for the first time, Lytics can enable logging to
am can help debug if you provide information on the login attempt, such as the login time, user, and account.

If you're encountering a verification error, but you've checked that your emails from the IdP and Lytics match, this m
SP side. Contact Lytics Support with details of the issue, and our team can coordinate a fix.

Account Structure with SSO
It should also be noted that primary accounts (master accounts) are decided as the first account that a user was add
ften have different primary accounts. This is important for SSO as it will also be the account the user is logged into at
eans of login on one account and a user attempts to log in using Google OAuth or their username and password, the
ns:

Add that user to your IdP.
Add other logging methods (Google OAuth, username/password).
Remove that user from all accounts and then add them back, with the first account being the one you want to be the
Assigning Roles using SSO
Configuring Role Assertions for SSO in Lytics

The Lytics team can configure Single Sign-On (SSO) to assign roles via SSO. This configuration must be applied to the
users need access. For more information, refer to the account structure with SSO.

Important Note:
Users cannot be assigned to additional accounts via SSO alone; they must be manually invited to each Lytics account

To set up role assignments via SSO, customers must configure their Identity Provider (IDP) to include a group asserti
ust be specified in the format:
lytics_<AID>_<Role>

Example of a SAML assertion for a user whose default account is 123 and also has access to account 234:

XML

```xml
<samlp:Response xmlns:ds="<http://www.w3.org/2000/09/xmldsig#">
   xmlns:saml="urn:oasis:names:tc:SAML:2.0:assertion"
   xmlns:samlp="urn:oasis:names:tc:SAML:2.0:protocol" xmlns:xs="<http://www.w3.org/2001/XMLSchema">
   xmlns:xsi="<http://www.w3.org/2001/XMLSchema-instance">
   Destination="<https://api.lytics.io/api/user/verifyauth">
   Version="2.0">
   <saml:Assertion xmlns:saml="urn:oasis:names:tc:SAML:2.0:assertion"
      ID="id1" IssueInstant="2024-08-29T16:02:42Z"
      Issuer="<https://your-idp.example.com">
      Version="2.0">
      <ds:Signature xmlns:ds="<http://www.w3.org/2000/09/xmldsig#">123456>\</ds:Signature>
      <saml:AttributeStatement>
         <saml:Attribute Name="Email">
            <saml:AttributeValue xsi:type="xs:string">test-user@test.com</saml:AttributeValue>
         </saml:Attribute>
         <saml:Attribute Name="groups">
            <saml:AttributeValue
               xmlns:xsi="<http://www.w3.org/2001/XMLSchema-instance">
               xsi:type="xs:string">lytics_123_content_manager</saml:AttributeValue>
            <saml:AttributeValue
               xmlns:xsi="<http://www.w3.org/2001/XMLSchema-instance">
               xsi:type="xs:string">lytics_123_admin</saml:AttributeValue>
            <saml:AttributeValue
               xmlns:xsi="<http://www.w3.org/2001/XMLSchema-instance">
               xsi:type="xs:string">lytics_234_admin</saml:AttributeValue>
         </saml:Attribute>
      </saml:AttributeStatement>
   </saml:Assertion>
</samlp:Response>
```

Note: This example is simplified to focus only on the group's assertion; a real-world example would be more detailed

Assignable roles

The following roles can be assigned:

Assignable Role	Name	Description
admin	Account Admin	Grants read/write access to all features and management functions.
content_manager	Content Manager	Grants read/write access to content classification, collections, and topics.
segment_manager	Audience Manager	Grants read/write access to audiences.
marketer	Marketer	Grants read/write access to audiences and campaigns but cannot publish campaigns or export
user_search	User Search	It grants the ability to search for users, view their profiles
report_viewer	Discovery Insights	Grants access to explore Discovery insights
report_manager	Report Manager	Can view, create, and delete audience insight reports
observer	Observer	Grants read access to audiences and campaigns.
data_manager	Data Manager	Grants read/write access to schemas, queries, users, content, and integrations, includ
campaign_manager	Campaign Manager	Grants read/write access to campaigns and audiences without PII, includin
orchestrate	Goal Manager	Grants read/write access to Goals and Experiences features.
experience_manager	Experience Manager	Grants read/write access to Experiences.

Implementing SSO with Okta

This document will walk you through how to implement Single Sign-On to the Lytics application with Okta as an iden
r application. Still, while the partnership is being established, you can follow these instructions to set up the custom a
ion of the implementation.

From your Okta Administration panel, navigate to Applications and then Add Application and Create New App.

Under Platform, select Web, and for Sign on Method, choose SAML 2.0.

Application Setup Okta

Under General Settings, you can enter the following values:

App name: Lytics
App Logo: You can save and upload the following image of the Lytics Logo:
Lytics Logo
Under SAML Settings, enter the following values:

Single Sign-on URL: https://api.lytics.io/api/user/sso
Make sure Use this for Recipient URL and Destination URL is not selected). Also select Allow this app to request othe
Requestable SSO URLs: Add the following two URLs:
https://api.lytics.io/api/user/verifyauth (index 0)
https://api.lytics.io/api/user/sso (index 1)
Recipient URL: https://api.lytics.io/api/user/verifyauth
Destination URL: https://api.lytics.io/api/user/verifyauth
Audience URI (SP Entity ID): app.lytics.com
Name ID format: EmailAddress

NOTE: Thehttps://api.lytics.io/api/user/ssoURL should only be used for Okta. Other SSO providers use the default UR

Okta Configuration
Okta Configuration
Click through the next step, and select Finish.

You can add users to view this application in their portal using the Assignments tab.

Navigate to the Sign On tab. And under settings, click on View Setup Instructions.
SAML Setup Instructions Okta

You will need to gather the information on this page and send it to Lytics for configuration of the Service Provider:

Identity Provider Single Sign-On URL
Identity Provider Issuer
X.509 Certificate
Once Lytics has completed the service provider implementation, you may begin to test the SSO implementation thro

Implementing SSO with OneLogin
This document will walk you through how to implement Single Sign-On to the Lytics application with OneLogin as an
custom application in OneLogin, which covers the IDP configuration portion of the implementation.

From the Administration menu, select Applications and then click Add App. Search for SAML Test Connector (Advanc
Under Configuration > Portal enter the following:
Display Name: Lytics
Make sure Visible in Portal is selected.
For the rectangular icon, you can save and upload the following image:
Lytics Rectangle
For the square icon, you can save and upload the following image:
Lytics Square
Click Save to continue to the configuration process. Then click on the Configuration tab to set up the SAML details.
Enter the following into the Application details:
Audience (EntityID): app.lytics.com
Recipient: https://api.lytics.io/api/user/verifyauth
ACS (Consumer) URL Validator: ^https:\/\/api.lytics.io\/api\/user\/verifyauth
ACS (Consumer) URL: https://api.lytics.io/api/user/verifyauth
Login URL: https://app.lytics.com/login/sso
SAML initiator: Service Provider
SAML nameID format: Email
OneLogin Config

Click on the Save to save your configuration changes.
You may configure any additional access details, such as users accessing this app in their portal for testing the integr
Click on the SSO tab, and you will need to gather the information on this page and send it to Lytics for configuration
X.509 Certificate (click View Details to see the full cert).
Issuer URL
SLO Endpoint (HTTP)
Once Lytics has completed the service provider implementation, you may begin to test the SSO implementation thro

Updated 3 months ago
Account Settings
Suggest Edits
Several account settings can be managed within the Vault interface. To access account settings, select "Vault" from th
Account Settings" from the secondary account menu at the bottom left.

Configuration Options

Account Details
Configuration options related to your primary account. Here, you can adjust your account name and primary contac

JavaScript Tag
Configuration options related to the core Lytics SDK, such as client-side integration configuration, Pathfora Personali

Lytics API
Configuration options related to the Lytics Personalization API. Here, you'll be able to manage detailed access setting

Content
Configuration options related to Lytics' content classification services. Here, you'll be able to configure settings relate
ocked, and more.

Security
Configuration options related to account security, such as password complexity, session duration, and two-factor au

AI & Modeling Controls
Configuration options related to Lytics' suite of AI and modeling capabilities such as private fields.

Schema Controls
Configuration options related to your core profile schema

Accessing Vault
Product Switcher Account Menu

Updated about 1 year ago
Account Details
Configuration of account details such as name and primary contact.

Suggest Edits
The following configuration options are available within the account settings Account Details section.

Account Name
Label for your account, which shows up in the account switcher, should you have access to more than one Lytics acc
Domain
Primary domain associated with your account.
Contact
Email address of the primary account contact.
Allow Access via API

To share profile data, such as audience membership, with integrations such as Google Analytics, profiles must be ac
Account ID (Non-configurable)
Your unique Lytics account identifier. Your primary identifier used in all API calls.
Account Number (Non-configurable)

Your unique Lytics account number. Used primarily for quick reference to which account you are currently within.
Updated about 1 year ago
JavaScript Tag Config
Configuration options for the core JavaScript SDK.

Suggest Edits
The following configuration options are available within the account settings JavaScript Tag section.

Client Side Integrations
A set of client-side integrations is facilitated by the core Lytics SDK. Each of those integrations is either deployed or d
Side Integrations" section. Each of those options follows the pattern outlined below.

Checking the box enables the integration and will result in either audience membership or attributes being passed t
onfigurations are also in place on the page.
Client-side integrations supported out of the box:

Amazon DSP: Allow Lytics to pass the current visitor's _uid to Amazon DSP for improved identity resolution.
Amazon DSP Confirmation Events: If false, confirmation events will not be sent to the amazon_dsp stream upon succ
Criteo: Allow Lytics to pass the current visitor's _uid to Criteo and receive a Criteo GUM ID for improved identity reso
Google Ads Partner API: Allow Lytics to use the Google Partner API to make Google Ads calls.
Google Analytics 4 (GA4): Allow Lytics to pass the current visitor's _uid and audience membership to GA4.
Google DV360: Allow Lytics to pass the current visitor's _uid to Google DV360 and receive a unique DV360 ID for imp
Krux: Allow Lytics to pass the current visitor's _uid to Krux for improved identity resolution.
Lotame: Allow Lytics to pass the current visitor's _uid to Lotame for improved identity resolution.
Taboola: Allow Lytics to pass the current visitor's _uid to Taboola and receive a unique Taboola ID for improved ident
The Trade Desk: Allow Lytics to pass the current visitor's _uid to The Trade Desk and receive a unique Trade Desk ID
Yahoo Ads: Allow Lytics to pass the current visitor's _uid to Yahoo and receive a unique Yahoo ID for improved identi
In addition to those outlined above, many automatic client-side integrations are included within the Lytics core SDK.
other tools if those tools have been configured on your site, too. For instance, Lytics will sync audience membership
esent on the page. To prevent these syncs, each integration can be blocked by adding the proper key to the "Integra

In this example, we have added the "google_analytics_dimensions" slug to the blocklist to prevent sending profile da
Available client-side integrations and their associated slugs:

Name	Slug	Description
Adroll	adroll	Adds a record named adroll_segments to the user, which houses audience membership.
AddThis	add_this	Adds the current audience membership to the __attag cookie.
Amazon DSP	amazon	Adds the Amazon DSP pixel to the site.
Facebook Ads	facebook_ads	Pushes Lytics audience membership as an array to the custom Lytics Audiences value
Google Analytics	google_analytics_dimensions	Pushes audience membership as a comma-separated string to a pre the sync occurs for a user.
Google DFP	google_dfp	Sets audience membership to a targeting param with the name LyticsSegments.
Google Tag Manager	gtm	Collects the dataLayer object when the Lytics tag loads. It also passes audience members
Krux	krux	Adds the Krux pixel to the site.
Lotame	lotame	Adds the Lotame pixel to the site.
Optimizely	optimizely	Pushes a custom tag with the audience membership.
Pathfora	pathfora	Allows for the installation of Pathfora (Lytics Personalization SDK).
Qubit	qubit	Collects the universal_variable object when the Lytics tag loads.
Lytics Audience Cookie	segments_cookie	Stores current audience membership for the user as a cookie.
Taboola	taboola	Adds the Taboola pixel to the site.
Tealium	tealium	Collects the utag_data object when the Lytics tag loads.

JavaScript Tag TTL (3.0)

The amount of time to cache the core JavaScript SDK in seconds. This should be used only during testing to ensure s
degraded performance for high-traffic production use.
Enable pageview event on first send (3.0)

Enables the automatic pageview event (_e: pv) in the first send event of every page load in JStag v3.

Allow Pathfora

Check this box to allow the Lytics JavaScript tag to automatically add the Pathfora personalization library to your site
 personalization.
Allow Event Block

Check this box to allow the Lytics JavaScript tag to automatically add the Pathfora personalization library to your site
 personalization.

0: Turns event block off.
1: Turns event block on if there are one or more active Lytics Experiences.
2: Turns event block on permanently at all times.
Global Stylesheet URL (CSS)

This custom stylesheet will be loaded in support of Lytics-managed Experiences.
URL Allowlist for Orchestration (Experiences)

List of strings that, if matched, will result in Experiences being evaluated in place of legacy campaign variations.
Personalization (Pathfora SDK) Generalized Config

The hashed JSON configuration is to be loaded globally for all Lytics-managed experiences.
Custom Cookie Keys

A list of cookie names that should be automatically collected by the core Lytics SDK.
Custom Data Layer

A list of JavaScript variables that should be automatically collected by the core Lytics SDK.
Disable Automatic Initial Pageview (2.0 - Deprecated)

Disable the automatic pageview event in the JStag v2 if pageview events are being sent manually.
Jstag2 Segment Cookie Duration (2.0 - Deprecated)

The number of minutes the ly_segs cookie that contains an individual's current audience memberships should persis
Updated about 1 year ago

Personalization API
Configuration options for the Lytics personalization API and related features.

Suggest Edits
The following configuration options are available within the account settings Lytics API section.

Allow Public Personalization API?

Check the box to allow the user profile of anonymous users to be exposed to users for personalization. It will only in
Allow Event Collection from Bots

Enable event collection for visitors who have been identified as bots. Bot identification is based on a set of match att
Collect entire user agent string?

Should the full user-agent be collected as part of all web events?
Allowlist domains public API

A list of domains to allow the Personalization API to be called from. If blank, all domains will be allowed.
Allowlist fields for public API

List of fields to allow for surface via the Personalization API.
Entity Timeout (ms)

Max time entity-public API waits before cutting off and returning what it has.
Updated about 1 year ago

Content Services
Configuration options for Lytics' suite of content services.

Suggest Edits
The following configuration options are available within the account settings Content section.

Extract allowed topics

Enable extraction of allowed content topics from the body of the document.
Content topic blocklist

A list of topics to be hidden from the overall content taxonomy. For example, a dinner restaurant may not care abou
tter affinities, as pictured above.
Content topic allowlist

A list of topics that must be included in the topic graph and candidates for content affinity. For example, building on
 ensure that topics they care about are absolutely present.
Content Allowed Query Parameters

A list of query parameters that should be retained during URL normalization such as page id or product sku.
Content domains blocklist

Domains that should not be classified even though there may be events collected from them. Note: to properly filter
m" or "sub.example.com"
Content blocked pages

Block any URL with an exact match to an item in this list (including the domain, not including the protocol. i.e. www.e
Content paths blocklist

Prevent classification of any page with a substring match of the path. For instance, /contact would prevent classificat
Content boosted attributes

Content list of IDs/classes to boost during body extraction.
Content created since date

Only include content in the index if the created date is after the specified date.
Custom content properties delimiter

The delimiter to use when parsing custom content topics on HTML meta tags.
Content custom properties

List of meta tags to include as custom topics.
Observe robots.txt in content enrichment

Observe robots.txt and meta directives:
- robotstxt - Observe only robots.txt directives.
- meta - Observe only directives in meta tags.
- none - Do not observe any directives
Content since date

Only include content in the index if the enriched date is after the specified date.
Content domains allowlist

Perform content filtering based on exact matches of domains in a URL. Any entries should include relevant subdoma
Content paths allowlist

Perform content filtering based on partial matches of any URL component.
Supported Content Languages

List of languages to permit during the content enrichment process. If empty, then only English content will be proces

Updated about 1 year ago
Security
Configuration options for account security and authentication.

Suggest Edits
The following configuration options are available within the account settings Security section.

Logon session days

The number of days a user session should be valid before forcing a re-authentication.
Logon session timeout minutes

The number of minutes between activities that should elapse before forcing a re-authentication.
Enforce password complexity

Ensure all users leverage passwords with a high level of complexity.
Enforce password history

Prevent the re-use of a previous password for each user.
Enforce password bad count

Lock the user's account if there are too many concurrent failed password/login attempts.
Password max age

The maximum age in days that a password can be before it must be changed. A value of 0 disables the max-age rest
unt.
Enforce two-factor auth.

Ensure all account users leverage two-factor authentication.
Two-factor authentication is a technique that helps to make your account more secure. It does this by adding a seco

Single-factor authentication uses your email address and password to authenticate your Lytics session.

The second factor comes from the Authy app using an Authy SoftToken, a secret token that changes every 20 second

What is an Authy SoftToken
An Authy SoftToken is a secret token that is broadcast to the Authy app every 20 seconds. This unique token serves a
Authy is available to download for free as a desktop and mobile app: Download Authy.

Using Two-Factor Authentication
The only difference between two-factor authentication and single-factor authentication is an extra step during login.
Authy SoftToken.

Using Two-Factor Authentication also requires every user to provide their phone number. Logging in with two-factor
rkflow.

Updated about 1 year ago

AI & Modeling Controls
Configuration options for the Data Science and AI related features.

Suggest Edits
The following configuration options are available within the account settings Data Science section.

EntQL Fields

List of fields to evaluate via EntQL in the merger, before indexing the entity
Enable Decisioning Triggers

When enabled, any Experiences configured to leverage decisioning will be automatically triggered.
Streams to Allow for Scoring

Add any custom streams that contain behavioral signals that should contribute to the overall set of scores.
Enable Decisioning Scores

Each profile will be enriched with a score representing their overall need for a message (needs_message) and the tim
The needs message is a numeric score representing the distance to or past the predicted event. A higher score signa
Turn On Priority Only for Decisioning

Automated Experience decisions will only leverage manual priority rather than full AI capabilities when enabled.
Updated about 1 year ago

Schema Controls
Configuration options for the profile and/or schema related features.

Suggest Edits
The following configuration options are available within the account settings Schema section.

Private fields

All fields containing PII/Private data should not be exposed to users unless their assigned role(s) allow viewing such i
Promoted Fields

List of fields outside the defaults that should be leveraged in data science modeling and reporting.
Hide Private Fields

Hide PII/Private fields from audience exports and scans initiated by users who do not have access to private fields.
Updated about 1 year ago
Data Policies
Welcome to the Data Policies section, where we will explore the important policies and controls that govern data ma
er the following topics:

Suggest Edits
Welcome to the Data Policies section, where we will explore the important policies and controls that govern data ma
ver the following topics:

Platform Limits

Privacy and Data Protection

Impact of Browser Tracking Changes

Updated over 1 year ago

Platform Limits
Suggest Edits
Platform Limits
The following limits exist to ensure the optimum performance of the Lytics platform and your connected sites, data s
ll accounts unless stated otherwise. If you have questions, please get in touch with your Lytics Account Manager.

Events
An event is any action or activity a user performs, any update to a profile, or any export out of the subscription servi

Resource	Limit	Description
Max input size	4 KB	Byte size of a single input record.
Max size in batch	16 KB	Byte size of a single input record within a batch.
Max size total batch	1 GB	Byte size of all records within a batch.
Max event ingress rate	Quota based on pricing	Events collected per hour.
Max output size	1 MB	Byte size of a single output record, also known as a trigger event.

Max trigger event egress rateQuota based on pricingEvents triggered per hour.
User Profiles
A User Profile is the living record of an individual that interacts with your brand. Lytics user profiles provide a view of

Known profiles have at least one known identifier such as an email or CRM ID.
Anonymous profiles have only anonymous identifiers such as a cookie ID.
ResourceLimitDescription
Max size of a user profile1 MBByte size of a single user profile.
Max size of a profile identifier256 bytesUnique identifiers are used to merge data fragments together into a single
Max number of user attribute values on a profile1,000Values include individual items in complex field types such a
_visted, only 900 values remain for the total count.
Max aggregate size of all user profilesQuota based on pricingTotal size of all user profiles.
Max number of custom mapped fieldsQuota based on pricingCustom mapping of fields through Queries & LQL.
Max stitched Identifiers50“Stitched” identifiers can be used to look up a user such as email or user ID.
Audiences
ResourceLimitDescription
Max number of audiences500Total audiences per account.
Max number of conditions (custom rules) per audience1,000This limit includes parent and nested conditions.
Max audience re-evaluation rateQuota based on pricingMax number of profiles Lytics will reevaluate per hour for
Max length of audience name displayed64 charactersThis limit is for displaying audience names in the Lytics UI.
Browsers and Cookies
The following limits apply to client-side integrations, which are implemented in browser-facing code through the Lyti

ResourceLimitDescription
Max number of audiences stored as a cookie5 MBBrowsers limit the max size of the sum of all cookies. This limit c
local storage instead of a cookie.
Max cookie size per domain4,096 bytesThis limit includes both Lytics-generated cookie names and the values of a
Maximum size of collect payload sent via URL2,000 bytesTry to keep payload sizes small enough to fit in a URL usi
e sent via iframe transport, which can result in poor performance.
Integrations
The following limits apply to server-side integrations, which allow Lytics to communicate directly with third-party ser

ResourceLimitDescription
Max number of active import integrations100Import integrations ingest data such as user profiles, activity data, an
Max number of active export integrations (“subscriptions”)200Export integrations send user profile data from Lytic
 data or metrics can also be exported for monitoring.
Max integrations creations per hour10This limit applies to all server-side integrations, including imports, exports,
Max lifetime of completed jobs90 daysThis limit applies to all jobs in a completed status, and defines how long Lyt
Max lifetime of paused / failed jobs90 daysThis limit applies to all jobs in a paused or failed status, and defines how
ng them purgeable.
Content
The Lytics Content Affinity Engine uses data science and Natural Language Processing to analyze content, extract top

ResourceLimitDescription
Max number of URLs enriched20,000 URLs per month--
Max number of topics displayed500This limit is for how many topics are shown on the user profile.
Max number of topics per user50Lytics retains affinities for up to 50 topics per user, representing the content they
Custom Modeling
Lytics enables you to build custom Lookalike Models as a proprietary service that uses your first-party data to evalua

ResourceLimitDescription
Lookalike Model count20This limit applies to activated Lookalike Models.
Max model audience size20M users per audienceThis limit applies to the source or target segment used in a Look
Updated over 1 year ago

Privacy and Data Protection
Suggest Edits
Privacy and Data Protection
As a service provider and data processor, Lytics assists its customers in enhancing security and meeting privacy and
ral Data Protection Regulation (GDPR) and California Consumer Privacy Act of 2018 (CCPA).

Listed below are the compliance-enabling functionalities Lytics provides. As used below, personally identifiable infor
nclude “personal data” as defined in the GDPR. Please consult your company’s legal counsel or privacy professional a
ust comply with.

Lytics recognizes that its customers are the data controllers of the PII, which Lytics processes on their behalf. Each Ly
estinations to use with Lytics and the types and content of PII shared between its sources and destinations. Lytics do
h third-party data except via customer-directed integrations.

Access Control
Restrict access to personal information by role.

Role Based Access Controls (RBAC):
Account Admins can easily add and remove account users. Lytics has various defined user roles with respective perr

Single Sign On (SSO):
Add SSO to your user login process to enhance security.

Multi-factor authentication (MFA):
Add MFA to your user login process to enhance security.

Restrict access to PII:
You can indicate any user fields that contain PII via the private fields account setting. These fields will be hidden for a
h roles. You should verify with Lytics Support that the field hiding in the segment scan is also enabled for your accou

Data Mapping
Map personal information processed by Lytics, including sources and destinations.

Audit your data schema:
Use the Schema Audit feature to see what user fields are being populated, the data contained, the source(s), and if t

Determine third-party data sources:
You can see the third-party data sources from which you send data to Lytics using the Lytics UI by navigating to Data
unless otherwise configured. You will see your other integrations in the list of stream names using the drop-down m
e Lytics received data.

Determine third-party data destinations:
You can view the activity history for a data destination using the Lytics UI by navigating to Data > Integrations. Click o
dy running the integration, you will automatically be taken to the overview page that shows a list of running imports

Notice and Consent
Manage user consent and preference data.

Obtaining Customer Consent
Lytics customers are responsible for obtaining consent for collecting and transferring PII to Lytics for processing. You
mers' online behavior. One consent mechanism is to implement a custom tag and trigger in your Google Tag Manag
age consent with Google Tag Manager.

For sites not using Google Tag Manager, customer consent on the web can be managed in several ways. Consent trig
our site. Another alternative is to use a cookie-consent solution, many of which exist. Github has documented a free
o consume triggers from any of these solutions to manage consent for your customers.

Recording Proof of Consent:
Schema fields may be established for the purpose of storing customer consent.

Privacy Policy Notice:
When you use a Lytics modal to collect user information, you should include a link to your organization’s privacy poli
added to any modal created using the Experience Editor.

Age Gating:

If you have collected accurate age data, you can build audiences that target or exclude certain ages.

Responding to Consumer Requests
Respond to the data subject (consumer) requests in compliance with regional and state privacy and data protection

Personal Data Access:
Using the find a user feature, enter the identifying details provided by the consumer to locate their profile. The profi
d any data on this user.

Personal Data Correction:
If user profile data requires correction, you must send the corrected data to Lytics, which will be remapped to conve

Determining Categories of Personal Data Collected:
You can use the Lytics UI to obtain information about the categories and specific pieces of PII collected on a consum
ou can view the fields of populated data and determine the appropriate consumer PII categories to disclose to a req

Personal Data Portability:
We support the export of profile information via the Lytics UI or APIs. An individual's profile data from Lytics will be c
is a common, machine-readable file format.

Personal Data Deactivation/Suppression:
You can establish audiences to enforce consumer suppression and "do not market" choices and prioritize those choi
udiences can be exported from Lytics to your downstream tools or "data destinations."

Personal Data Deletion:
We provide a method for deleting users via the Lytics UI. Our API may also be used for this purpose. This will send a
request for the customer identifier provided.

SOC 2 Audits
An independent auditor has examined Lytics platform controls and confirmed they are in accordance with the Servic
r Security, Availability, and Confidentiality. You can learn more about our SOC 2 Type II examination in this blog post.

Lytics will continue to engage independent auditors to conduct SOC 2 Type II audits regularly and make our audit rep
ition, we retain independent security firms to conduct regular penetration tests and vulnerability scans on our syster
r, Google, also submits to regular, multiple independent audits, including SOC 2 Type II audits.

Safeguards and Transfers
Lytics Data Protection Safeguards:
Lytics and its data hosting partner, Google, have implemented numerous safeguards to protect the PII that Lytics pro
feguards on an annual basis. For more information regarding these safeguards, please ask your Lytics account mana

Transfers of Personal Data from EU:
Lytics participates in the EU-US and Swiss-US Privacy Shield Frameworks regarding collecting, using, and retaining pe
. We have certified with the U.S. Department of Commerce that we adhere to the Privacy Shield Principles. Please let
o enter into the EU Standard Contractual Clauses regarding data transfer from the EU to the U.S.

Updated over 1 year ago

Impact of Browser Tracking Changes
Suggest Edits
Impact of Browser Tracking Changes
Announcements about browsers changing their cookie tracking policies have created tremendous concern and conf
ese changes represent dramatic shifts in how users and their activity are tracked across the web.

Browsers are removing third-party cookies and altering the default behavior of first-party cookies, which makes first-
. The following explains how current and upcoming browser changes will impact your web tracking involving Lytics.

Overall impact
The blocking of third-party cookies, whether by browser default or user choice, will significantly impact the effectiver
ion, and measurement efforts dependent on the use of third-party cookies. In addition, Apple's ITP 2.2 impacts certa

For Safari users, cookies get cleared after seven days if there is no activity. So if a user visits a site once and returns e
that user returns every day for eight days, their cookie will remain intact.

This can skew analytics, impact personalization efforts for anonymous users, and affect conversion attribution. But p
ile web traffic in the US for non-mobile and worldwide browser usage, Safari's market share is around 20 percent as

More importantly, these browser changes continue the trend of giving individuals more control over what brands/er
y point to the need for brands to maximize relevant content or offerings for a site visitor in real-time, which can lead
t-party relationship. These browser changes reflect the change from a model that exploits third-party data outside a
ivating a relationship with the consumer for mutual benefit.

Impact on Lytics
The good news is Lytics was designed to help companies establish first-party relationships with their customers and
les you to collect and leverage first-party data in various ways, such as: acquiring new customers, serving ads on-site
t to users based on their interests.

Onto the technical details. To understand how these browser changes will impact the Lytics JavaScript tag (aka Track
cs builds profiles for your anonymous visitors.

It all begins with Lytics' unique client-side identifier, which is referred to as the UID or _uid. When a user visits your w
a unique value for this UID and stores it as a browser cookie. This UID is then appended to any behavioral data colle
sequent visit, this UID persists since it has been stored as a cookie.

The impact of cookie changes on this process will vary by browser. In the case of Safari, for example, it means that if
ntifier will be deleted. As such, it will become imperative to double down on your identity resolution strategies and e
nymous cookies with other known identifiers that can persist, such as user IDs upon login.

In addition, some customers leverage the loadid parameter as part of their tag configuration. Historically, this has en
erties. This loadid method relies on third-party cookies, which are impacted heavily by these cookie changes. Like the
on strategies become more important.

To date, efforts have been made to rely less on browser cookies, given their uncertain nature. Version 3 of the Lytics
owing Lytics to respond to these types of changes more efficiently. At the end of the day, however, restricting or rem
rketer, use and monitor the web. Focusing on safe, secure, and transparent resolution strategies is at the core of the
rcome these changes in the future.

Q. What cookies are issued in connection with the Lytics tag?

By default, Lytics sets a cookie seerid that is used to identify a user. This is then surfaced in a users profile as _uid. O
eb-based identity resolution.

Q. Are Lytics' cookies first-party cookies or third-party cookies?

When issued by the client website domain on which they run, Lytics' cookies are treated by browsers as first-party co
lients have established separate top-level domains for two or more of their brands. In these cases, many have levera
re the same identifier as a third-party cookie. This allows for a hands-off approach to resolve identities across domai
described above.

Stale cookie removal feature
Lytics has enabled a "cookie culling" feature that prevents "stale" (old) cookies from being used as identifiers to stitch
s mentioned above, this ensures only valid identifiers will be used to build your Lytics user profiles, which helps keep

For example, if a Safari user visits your site once and doesn't return within two months, Lytics can remove this cookie
reason to keep this cookie as an identifier because it can't be used for personalization. Lytics recommends opting for
customized according to your needs. Don't hesitate to contact your Lytics Account Manager if you are interested in e

Once Lytics removes cookies after your specified time frame, not only the "stale" cookies are removed, but any other
the stitching process. As a result, any associated data with the old cookies will not be included on user profiles unles
n email or user ID). However, the data lost from turning on cookie culling can be found again if the feature is turned

iated with the missing data is no longer skipped.

Cookie changes per browser
The following information has been updated as of January 31, 2020.

Cookies are used for persistent login, preference storage, and tracking across websites. Google, Apple, and other bro
acking of users across websites. This functionality is promoted as privacy-enhancing by giving a user greater control
n third-party cookies, but Apple's technology also focuses on certain first-party cookies.

Apple
Apple introduced its Intelligent Tracking Protection (ITP) functionality in 2017 to block the use of cookies deployed or
track Safari ITP changes on Apple's WebKit website. Generally, Safari has set a 7-day expiration period on first-party
ith link decoration. This means for users that don't revisit a site within seven days to extend their expiration, the coo
s the next time they visit the site.

Firefox
Like Safari, Firefox blocks third-party cookies by default through Enhanced Tracking Protection.

Google
In 2019 Google announced it was changing its approach to third-party cookies by not blocking them by default and r
users options to block the cookies they want to block and to delete cookies after a session (fingerprinting out as wel

In mid-January of 2020, Google announced its intent to phase out support for third-party cookies in Chrome by 2022

Updated over 1 year ago
Compliance
Suggest Edits
Downloading a Customer Profile
GDPR requires the right of access and data portability. You can use the Lytics platform to download a JSON file of a c
a customer profile.

Log into your Lytics account.

Click Audience > Find a user.

Select the field you would like to search on from the drop-down menu. By default, Email is selected.

In the Search box, please enter the email address (or selected search term) of the customer who has requested thei

Select the desired customer from the results list.

Click Download profile.

You will receive a success message and profile.json will begin to download.
Deleting a Customer Profile
The GDPR and CCPA requirements grant the user in scope to request the removal of their personal data without und
from Lytics via the Lytics UI. In addition, you can use the Lytics API to delete a customer profile. A successful deletion
the status of a customer in the Lytics UI until the profile has been removed from Lytics. The removal is handled in ba
.

Log into your Lytics account.

Click Audience > Find a user.

Select the field you would like to search from the drop-down menu. By default, Email is selected.

In the Search box, enter the customer requesting removal's email address (or selected search term).

Select the desired customer from the results list.

Click Delete user.

A confirmation message will pop up; click Delete this user to confirm.

There will be a Request ID in this message to track or audit the success of the GDPR deletion request.
The customer will be marked for deletion and removed from Lytics within the GDPR-required timeframe.

Updated 11 months ago

Authorizations
Suggest Edits
What are Authorizations?
Channel tool authorizations refer to the permissions granted to various integrations that allow our platform to acces
include email service providers, social media platforms, and advertising networks.

Once permission has been granted, Lytics surfaces "Authorizations," which allow you to manage and maintain the co
to create and manage auths to ensure the long-term health of your data pipeline.

Creating Authorizations

Authorizations are currently accessed from your account navigation menu by selecting Account > Security > Authoriz

Create new
Within the Authorizations section of the interface, you will see a list of existing Authorizations and a button to "+ Cre
ation wizard, where you will:

Choose the provider.
Select the desired authorization method.
Add a name (label), description, and complete the configuration options.

You will need authorization for most jobs when going through the job creation wizard in Lytics. At the "Choose Autho
ill direct you to the authorizations wizard in a new tab. You will be prompted to choose the method and configure th

Authorization Methods
Note that some integration providers only have one authorization method, but others offer multiple methods such a
such as real-time vs. bulk audience exports. If you are unsure which method to use, you can find more information i

Google auth methods
For example, if you are looking to import event data from Google Cloud Pub/Sub into Lytics, there is only one metho
s the Import Data (Cloud Pub/Sub) job in Lytics.

Managing Authorizations
The Authorization Summary provides essential details about each authorization to help ensure an integration is app
he top of the summary page, you'll see the following information:

Provider: The third-party tool that this authorization connects to.
Method: Indicates how the authorization was made, such as API keys, OAuth, personal or business users, etc.
Health: Indicates whether the Authorization is valid and active.
Owner: Lytics user who created the authorization.
Created At: The date the authorization was initially created.
Last Updated: The date the authorization was most recently edited.

What determines authorization health?
Lytics checks the status of authorizations daily to help you proactively resolve authorization issues. Our API will retur
lable for your provider:

Healthy: The authorization is valid and active.

Unhealthy: The authorization is invalid and inactive.
Unknown: The authorization status is unknown.
If your authorization is marked "Unhealthy," Lytics cannot verify that it has the requisite access and permissions. Visi
he authorization credentials you entered have the necessary permissions in the external tool.

If adjusting permissions in the external tool does not apply or is not an option, you may need to create a new author
te the unhealthy authorization.

Edit or Delete Authorizations
You can edit or delete authorizations directly in the Lytics UI using the buttons at the top right of each authorization
rization and revise the description, but the configuration options cannot be changed. If you need a different configur
the previous one.

You can only delete an authorization if no active jobs use it. If there are associated jobs with a running, sleeping, or p
deleting the authorization. Likewise, you will need to delete any imported Experiences that are actively using an auth

Activity Metrics
Once metrics are available for each authorization, this chart will become populated with the number of requests ma
le to view the metrics hourly, daily, weekly, or monthly, depending on the available data.

Authorization metrics are currently only available for select providers (including Facebook, Iterable, Salesforce, Send
providers.

Associated Jobs
This table provides a helpful organization of all active jobs using the current authorization. Jobs can be sorted by nar
re details on the job summary page.

Authorizations Dashboard
Authorizing the connection between Lytics and other providers allows you to create jobs to import, export, and enric

Navigate to Account > Security > Authorizations to find your Authorizations Dashboard, which gives an overview of a

All authorizations are displayed in a table and are sortable by the following fields:

Label: The name of the authorization as defined by your input for the "label" field.
Description: Optional text field to differentiate authorizations. This is particularly useful when you have multiple Auth
Provider: The third-party tool that the authorization is connecting to Lytics.
Status: Indicates whether the authorization is valid and active.
Created By: Lytics user who created the authorization.
Last Modified: Date the authorization was last edited.
Click on a specific authorization to view its summary page, which will provide more details and allow you to edit or de

Updated 1 day ago
Access Tokens
Suggest Edits
Access Tokens
Creating and managing your access tokens gives you fine-grained control over how your Lytics account and data is a
the menu in Vault. Note that just like all other account settings, you must have administrator privileges to view and m

Viewing existing Access tokens
If this is your first time creating an access token, you will see a message prompting you to create a new token.

Once you have created at least one access token, this page will display your tokens, their expiration dates, and the u

You can also click on a specific token to see the list of roles the token has been granted, the lifetime of the token, the

Creating a new API Token
To create your first token, click the Create New button and fill out the following fields on the modal that appears:

FieldDescription
NameToken name.
DescriptionThough optional, it's helpful to add a description so each token's purpose is clear.
ExpirationToken expiration length. Current options include 90 days, 30 days, seven days, and No expiration, which
RolesEach token can be tailored to have the precise access needed and no more.
Click Generate token to create your token. You will be prompted with a one-time dialog window that contains the ac
t again, so please copy and paste it somewhere secure.

Deleting an existing API token
When an API token is no longer needed, or you otherwise wish to remove one or more tokens, click on the token fro
h the deletion.

This operation is not reversible and you will be prompted twice before each token is deleted. Anyone or anything de

Updated over 1 year ago
What is Cloud Connect?
Suggest Edits
Introduction
Cloud Connect allows you to run complex SQL queries directly against your data warehouse and translate the resulti

Cloud Connect in Action

Cloud Connect in Action

Check out the solution architecture developed with Google which leverages BigQuery and Analytics Hub in addition t
ion and activation.

Getting Started
Accessing Cloud Connect
Cloud Connect is available to all Lytics customers. If you don't currently have access via the product switcher at the t
management team.

Common Use-cases
Cloud Connect unlocks many use cases enabling marketers to segment their customers based on any attributes stor

Time Window: All users who did not log in last month.
Joins (B2B): All users associated with accounts without feature "x."
Lifetime Value (LTV) or Rollup: All users with a premium subscription have purchased at least two products.

Need a warehouse?

Don't currently have access to a data warehouse? Lytics has you covered with Lytics Warehouse. We provide a simpl
s part of Conductor. Simply reach out to account manager or support for access and information.

How it Works
Cloud Connect augments the rest of the Lytics CDP suite by providing a secure and flexible entry point into your data
orm a number of complex data manipulations or aggregations and stream the results directly to materialized user p
segments, and activate across hundreds of marketing channels in just a few clicks.

Below you'll find an overview of the general architecture, which can be summarized into these key value drivers:

Direct access to existing customer data in your warehouse.
No need to rip and replace or replicate consumer data in order to activate.
Leverage standard SQL to extract only what is relevant to your business goals.

Maintain your warehouse as the "source of truth."
Requires very little to implement and begin generating ROI.
Cloud Connect diagram

Updated about 1 year ago
Connecting Warehouses
Suggest Edits
Access
Cloud Connect tabs are found under Data Pipeline > Cloud Connect. Connections configure the access to your data w
connect audience membership and profile attributes.

Creating a Connection
Click + Create New Connection from the Connections Dashboard at the top right and complete the following steps.

Choose the provider.
Choose the Connection type.
Select an existing Authorization or create a new one by following the Authorization instructions.
Add a name (label), description, and complete the configuration options. These will vary slightly between providers.

Authorization & Security
The authorization selected for your Connection will control your Lytics account users' access to your data warehouse
taset or individual tables, maintaining your security and governance practices within your data warehouse.

Supported Data Warehouses
Cloud Connect currently supports a number of popular data warehouses:

Amazon Redshift
Databricks
Google BigQuery
Microsoft Azure SQL Database
Snowflake
Managing Connections
Once you have created a Connection, you can access a summary page showing how data from your data warehouse
owing information:

Provider: Data warehouse that you are connecting with Lytics.
Authorization: Name of the authorization, such as “Cloud Connect JWT.” Note: Lytics users can access any data tables
Type: Indicates the type based on your provider.
Created By: Lytics user who created the Connection.
Created On: Date the Connection was initially created.
Last Updated: Date the Connection was most recently edited.

The rest of the Summary tab shows how many active and inactive data models are built using this Connection as a d
Activity chart displays how many rows are being queried, which can have cost implications based on your data ware

Explore
The Explore tab provides a simple Schema Explorer to validate that the data shown is as you would expect to see in y
dividual table, but here you will see as many tables as the authorization has read access to.

Details
The Details section displays all the information about setting up your Connection, including the authorization and co

Logs
The Logs section records the history of events for this Connection, which are helpful to ensure your connection is wo
see.

Connection Events	Description

Created First event indicating the Connection is active.
Updated Connection was updated by a Lytics user.
Deleted Connection was removed and any data models built on this Connection will no longer be updated.
Updated 3 months ago
Data Models & Queries
Suggest Edits
Cloud Connect Data Models
A Data Model is used by Cloud Connect to link or "connect" a user's external data warehouse to Lytics profiles. Each
ach Data Model will also configure a join key which defines how the Data Model is joined to Lytics Profiles.

Once a Connection to your data warehouse has been created, Data Models can be created via the Data Models tab w

Creating a Data Model
Click + Create New from the Data Models dashboard and complete the following steps.

Select the Connection.

Write the SQL query.

Query Editor: Write and test standard SQL queries directly in Lytics. Alternatively, copy and paste queries you've test
 Query, Lytics will return 10 sample records.

Test the query and validate the results.

Configure the Data Model.

Name: Data Model name
Description: The Description of the Data Model.
Slug: The Data Model name that will be used in the membership and activation fields in the audience builder. It is im
 audiences in the tool. If no slug is selected, it will auto-populate using the model name.

Primary Key: Select the data warehouse ID that will be used to match against profiles in Lytics.
External Lytics Key: Select a Lytics user profile field that is a unique identifier to map to an identifier in your incoming
Activated Fields:Select the fields you want to bring into Lytics profiles for activation. Note that each data model can c
Sync Frequency: Select a time interval to run the query on - this is also the frequency that your Lytics profiles will be
ry 3 weeks.
Create new Lytics profile: Check this box if you want to create new profiles in Lytics if a profile with a matching ID do
eck box, only users with matching IDs to the Data Model IDs will be updated.

Activate the Model. Until the Data Model is activated, its SQL query will not be run against your data warehouse and

When building multiple Cloud Connect Data Models with the same primary key, you must select the same External L
error when you try to save the new Data Model.

Example Use Case
Consider this scenario to demonstrate why you'd want to create a Cloud Connect Data Model driven audience instea
 to run a holiday campaign that sends a promotion to any customer who purchased an e-bike in November or Decer
ho are interested in particular bike brands. All of this purchase and product data already exists in your Google BigQu

BQ-SQL-holiday-sample

Instead of directly importing all that purchase history data into Lytics, you can write a SQL query to find which custor
ly into the Lytics Model Builder (as shown in the generate a query screenshot above), you'll create a new audience in
e.

Once the Data Model is activated, profiles will be updated with a membership field that can be used to create an auc
hen be used for more dynamic audiences.

SQL Translator
If you would like to skip having to write a SQL query, simply describe the Data Model of what you wish to fetch and u
for you. Lytics makes queries to your database to ensure that the data is up to date and accurate when creating the

Updated 20 days ago
Activating Data Models
Suggest Edits
Activating Data Models
Because the queries that power your Cloud Connect Data Models can have costs associated with your database usag

After you've created a new Cloud Connect Data Model, you'll notice that the Status is listed as Inactive:

In order to activate, click the Activate button on the Data Model page:

Once you click the Activate button, your query will complete its first run within an hour of the Next Sync On timestan
interval you selected. During each sync, the SQL query will be run against your database, and your Lytics profiles will
Model.

Once synced, the Total Records metric on the Data Model summary tab may take up to 2 hours to display. This numl

Data Model Field Creation
Upon activation of a Data Model, Lytics will automatically create one customer profile field which represents the mer
created if the Data Model was configured to include Activated Fields. Below is a guide for how to locate these genera
der (on the Custom Fields tab)

Profile Field	Structure of Short Description	Structure of Slug
Data Model Membership	Data Model Slug (membership)	cc_Data Model Slug_membership
Data Model Activated Fields	Data Model Slug - Query Field	cc_Data Model Slug_Query Field

Deactivate Data Model
If you need to disable a Cloud Connect Data Model from syncing at any point, you can do so by navigating to the Dat

Deactivating the Data Model will not remove its corresponding fields from schema or from Lytics profiles; however, i
n order to completely remove the fields from schema/profiles, the Data Model must be deleted.

Total Records vs. Count of Users
Throughout the app, you may see different metrics for Cloud Connect Data Models.

Total Records within the Data Model Summary
On the summary page for your Cloud Connect Data Model, under the Total Records statistic (shown in the graph bel
y based on the unique number of primary keys in the origin database. This may be equal to or less than the number
ber you see in the audience builder when utilizing this Data Model.

Count of Users within the Audience Builder
When adding Cloud Connect Data Model membership or activated fields to audience logic in the Audience Builder, y
count of users within the Audience Builder is the number of users in your Lytics account who met the qualifications f

on the Data Model. This number reflects the number of records that would be included if you were to run an export

Most common reasons for why this number may be smaller than the Total Records metric are the following:

If the "Create New Profiles" option isn't selected on the Data Model, the count of users in the Audience Builder will o
nts
Audience Builder will exclude any profiles which are marked as being Unhealthy. Learn more about unhealthy profil
-profiles
Exporting Data Models
Once activating a Data Model, its associated fields will be stored as user fields on the customer profile (to see the na
bers of the Data Model, you will first need to create an audience in the Audience Builder. You can create an audienc
e most out of your customer data.

For example, you could build a Cloud Connect audience using account-level data for a B2B use case and add one of
red user engagement level.

To learn how to export audiences, visit our Activating Audiences documentation here.

Updated 20 days ago
Cloud Connect Troubleshooting and FAQs
Suggest Edits
Syncs
What is a “sync” in the context of Cloud Connect?
A sync refers to the process of running SQL queries configured on Data Models against data warehouses and then u
previous sync.

Will my SQL query only be run once per sync?
Most of the time, yes. However, if an interruption occurs during the sync (either due to a processing or network erro
t off. If that occurs, we’ll need to rerun the query.

Why are the sync times slightly different than what I’d expect?
On the Data Model Details page, we display two timestamps related to the sync for your Data Model: “Last Sync on”
time when your Data Model was last synced. However, the timestamp shown for “Next Sync On” will vary slightly fro

In an effort to reduce the number of syncs needed, we set the “Next Sync On” timestamp in a way where more mod
models are ready to sync - if “Next Sync on” is in the past, we sync the model.

Ultimately, you should think of your selected sync frequency as the number of times per day your model will sync (e.
s per day). The “Next Sync on” timestamp gives an estimate as to when the next sync will occur rather than the exact

Data Models
Why can’t I create a Data Model that returns no rows?
We use the columns returned by the SQL query to set up our internal schema. If no data is returned by the query, w
a. Note that once the schema is set up, your Data Model will continue to sync regardless of how many rows are retu

Why can’t I create/update a Data Model when my schema has unpublished changes?
Creating a Data Model modifies your Conductor schema - at a minimum, a true/false “membership” field will be add
n, one field is added for each activated field that’s selected. In order for these fields to be added, your Conductor sch

When updating a Data Model, we’ll attempt to update your Conductor schema if any activated fields are being chan
ur schema has unpublished changes, we’ll reject the update.

Can I select any field as the primary key?
The UI allows for selecting any column that’s returned by your SQL query as your primary key. However, it’s importa
here are duplicate values, we cannot guarantee that the values for your activated fields will be correct.

You should choose a field whose values will match to the values of an existing “by” field in your Lytics schema.

Can I select any field as the Lytics key?
No; only “by” fields can be selected. Further, once a Data Model has been created for a certain primary key, all subse
 same Lytics key.

Sync Failures Related To Collation
Cloud Connect requires that the column you use as the primary key of your data model queries be UTF-8 collated. If
l syncs to fail. Most database providers allow columns to be converted to a particular collation within a query. If your
mentation of your database provider to ensure a compatible collation:

Snowflake
BigQuery
Azure
RedShift
Updated 10 months ago
Managing Reports
Suggest Edits
Reports come fully equipped to manage your Reports across your team.

Editing and Deleting Reports
Users can quickly Edit and Delete reports at the top of the Report page. The Edit option allows you to rename the Re

Sharing Your Reports
Creating Audience Reports in Lytics can be a collaborative process. By default, Reports within Lytics are shared acros
essing Reports globally the.Reporting role can be disabled for specific users.

In addition to the global role, a report creator can further restrict access to their reports by setting the report asprivа
The screenshot below outlines the simple setup process to fine-tune collaboration and access to individual reports.

Change Logs
Lytics records a log of all changes made to a Report in the “Logs” tab. This record lets users keep track of who update

Downloading Reports
Each component in Lytics provides the option to download the associated data in a CSV format. The Download icon i

Updated over 1 year ago

Dashboard Report
How to interpret and configure your Dashboard Report

Suggest Edits
Once data is flowing into your account, Lytics will automatically generate a Dashboard Report on the homepage of th
zable, the out-of-the-box Report consists of 4 Report Components that incorporate some of Lytics' Behavioral Audie

Size Component of the All, Lytics New, and Lytics Highly Engaged audiences
Dataflow Component of the 5 most "used" audiences (ie the audiences that appear in the most Jobs).
Composition Component of Lytics' Content Affinity
Overlap Component of the All, Lytics New and Lytics Highly Engaged audiences.
To modify or edit the Dashboard Report, simply click on the Edit Dashboard button located on the top-right corner o
age, where you can add or delete Components, and edit existing Components.

Updated over 1 year ago

Evaluating Lookalike Models

Suggest Edits
Lookalike Model Summary
The Lookalike Model summary view consists of three tabs each containing valuable information about your model. T
ccuracy, reach, and its usage. The Configuration tab displays the options selected to build the model, and the Diagno
or debugging.

Model Summary
The model summary dashboard surfaces the key metrics of a model. Here you can see a model's accuracy and reach
hat contribute to the model, what audiences are using the model, and any diagnostic and troubleshooting messages

lookalike-model-summary
What determines model health?
At the top of the summary page, you will see a tag indicating whether your model is healthy or unhealthy. Lytics dete
e predictions -- predictions from unhealthy models should not be trusted. Models are considered unhealthy if the ac
overfit (with an R2 value greater than 0.975).

Accuracy
Accuracy describes the precision of a Lookalike Model's predictions — that is, how closely a model's predictions mat
racy can be used to narrowly target the strongest lookalike candidates, which are better applied to later stages of yo

lookalike-model-summary-accuracy
Reach
Reach describes the relative size of a Lookalike Model's addressable audience. Higher reach models can broadly targ
funnel.

lookalike-model-summary-reach
Model predictions
The model prediction section displays the size of your source and target audiences and charts the predictions for th
Y axis represents relative density. The shape of the graph is most important, which indicates the amount of overlap
for examples of how different trade-offs between accuracy and reach will look in the model predictions graph.

Model feature importance
Model feature importance indicates features among users likely to convert from the source to the target audience. T
ing to the model calculation ordered from most to least important. Identifying these features may give you a better u
audiences. You may even opt to include some of these features when building an audience with this model.

lookalike-model-summary-feature-importance
Model usage
Model usage displays a list of audiences built that are utilizing this model for targeting as well as a button to create a
h Predictive Audiences from a healthy Lookalike Model perform very well, providing higher conversion rates. Clicking
nce builder, pre-populated with a rule utilizing the prediction score user field for your model. More details on buildin

Diagnostics & Troubleshooting
The Diagnostics and Troubleshooting section provides messages pertaining to the performance and status of your L
r information. Warnings and error messages may indicate why your model is unhealthy or provide suggestions on h

lookalike-model-suimmary-diagnostics-troubleshooting
To resolve these messages, try changing the source or target audiences, or any of the other configurations as sugges

Model Configuration
The Configuration tab displays the settings used when creating the model.

lookalike-model-summary-configuration
Model Diagnostics
The Diagnostics tab provides an advanced view into a Lookalike Model's performance and can help provide assuranc
n is helpful for technical users looking to gain extra insight into the data science behind this Lookalike Model.

lookalike-model-summary-diagnostics
R2: A measure of how successfully a model is able to predict its desired outcome. It can be interpreted as the percen

erfect model would have an R2 value of 1, and an ineffective model would have a value of zero.
Mean Square Error: A measure of how closely a model's predictions matches actual outcomes. The scale of MSE has
wer MSE would indicate a better fit.
False Positive Rate: The percentage of "false positives" in a model -- that is, percentage of users in the source audienc
ce. While the false positive rate shouldn't be too high, a large false positive rate tends to yield a model with higher re
False Negative Rate: The percentage of "false negatives" in a model -- that is, percentage of users in the target audien
ce. A lower false positive rate means that a model succeeds in correctly identifying the latent characteristics of the ta
Overall Error Rate: The total percentage of misclassifications that occurred during model training.
Accuracy: A measure derived from a model's R2 value, rounded to the nearest decile.
Reach: A measure derived from a model's specificity value, typically ranging from 0 to 10. A larger value of reach indi
imilarly to the target audience.
AUC: A measure of the area under a receiver operating characteristic curve (or "Area Under the Curve"). ROC curves a
odel.
Decision Threshold: The "optimal" model prediction value to use as a cutoff when constructing an audience definitio
uld have the same "penalty" as a false negative.
Updated over 1 year ago
Creating Predictive Audiences
Suggest Edits
Once a Lookalike Model is built and users are scored (make sure the Model Training Only option is unchecked or on
eate Predictive Audiences with different prediction decision thresholds for the model or percentiles based on the pr

From the Lookalike Models list view, click the model you'd like to use to build a Predictive Audience. Then find the Mo

create-predictive-audience
This opens the Audience Builder. All Lookalike Models are keys under the user field Lookalike Model Predictions. The
a scale of 0-1. Users closer to 0 represent a low likelihood to look like users in the target audience and vice versa for

lookalike-model-predictions
By default, this rule is populated with the model's Decision Threshold, computed as the equilibrium prediction score
ch). However you can adjust this threshold as you like or add additional rules before saving the audience. See Impro
d. Any audiences built using the audience prediction score for your model will display in the model usage module.

Using Lookalike Model Percentiles
Another option to build a Predictive Audience is by using the Lookalike Model Percentiles field. Similar to the Lookali
the Lookalike Model Percentiles field.

lookalike-model-percentiles
The percentile for a model represents the value at which a percentage of the predictions fall below. For example, the
all other scores fall below, or more simply put; the top 20% of users. Percentiles help account for the shape of a mod
etermine who the best users are based solely on the prediction scores, if the distribution is skewed is any direction.

Updated over 1 year ago
Leveraging User Profiles
Suggest Edits
Welcome to the Leveraging User Profiles section, where we will explore how to use Lytics user profiles to gain a deep
riences. This section will cover how to define and segment audiences, personalize experiences, and track user behav
data analyst, this section will provide you with the essential knowledge needed to leverage Lytics user profiles and g

Updated over 1 year ago

Accessing Profiles Client Side
Suggest Edits
Accessing Data from JavaScript Tag
Once user fields have been surfaced, they can be used to personalize a user's experience. For example, a theoretical
vehicle search results in the following data available in the browser.

JSON

```
{
  "last_make": "audi",
```

```
  "last_model": "rx8",
  "last_color": "onyx",
  "segments": [
    "all",
    "potential_buyers",
    "high_momentum"
  ]
}
```

Populate a Form

Create a JavaScript function that populates form fields.

JavaScript

```
function(data){
  if(data.last_make !== ""){
    $('input[name="make"]').val(data.last_make);
  }

  if(data.last_model !== ""){
    $('input[name="model"]').val(data.last_model);
  }

  if(data.last_color !== ""){
    $('input[name="color"]').val(data.last_color);
  }
}
```

Initialize the callback handler.

HTML

```
<script type="text/javascript">

</script>!function(l,a){a.liosetup=a.liosetup||{},a.liosetup.callback=a.liosetup.callback||[],a.liosetup.addEntityLoadec
ack){var i=[];i.push(a.liosetup.callback),a.liosetup.callback=i}a.lio&&a.lio.loaded?l(a.lio.data):o?a.liosetup.callback.unsl
```

Create a callback: This will execute an action via JavaScript once the visitor has been identified and the profile has be

HTML

```
<script type="text/javascript">
    window.liosetup.addEntityLoadedCallback(function(data){
      if(data.last_make !== ""){
        $('input[name="make"]').val(data.last_make);
      }

      if(data.last_model !== ""){
        $('input[name="model"]').val(data.last_model);
      }

      if(data.last_color !== ""){
        $('input[name="color"]').val(data.last_color);
      }
    });
</script>
```

Once the profile has loaded, Lytics will call the JavaScript function and populate the form on the site. Once all the abo

HTML

```
<!doctype html>
<html lang="en">
<head>
```

```
  <meta charset="utf-8">
  <title>form value demo</title>
  <script src="https://code.jquery.com/jquery-1.10.2.js"></script>
  <script type="text/javascript">
    // Lytics JavaScript Tag
    window.jstag=function(){function t(t){return function(){return t.apply(this,arguments),this}}function n(){var n=["rea
call(arguments)),this._q.push(n)})}var i={_q:[],_c:{},ts:(new Date).getTime(),ver:"2.0.0"},c=Array.prototype.slice;return i.
r(t),this},i.loadtagmgr=function(t){var n=document.createElement("script");n.type="text/javascript",n.async=!0,n.src=t
gName("script")[0];i.parentNode.insertBefore(n,i)},i.ready=n(),i.send=n("send"),i.mock=n("mock"),i.identify=n("identify
c.call(arguments,1)])}),i.block=t(function(){i._c.blockload=!0}),i.unblock=t(function(){i._c.blockload=!1}),i}(),window.jstag
oadid:false});
  </script>
  <script type="text/javascript">
    // Lytics Callback Handler
    !function(l,a){a.liosetup=a.liosetup||{},a.liosetup.callback=a.liosetup.callback||[],a.liosetup.addEntityLoadedCallba
var i=[];i.push(a.liosetup.callback),a.liosetup.callback=i}a.lio&&a.lio.loaded?l(a.lio.data):o?a.liosetup.callback.unshift(l)

    // Custom Callback Function
    // This particular callback simply checks that the three values are not empty strings and then uses jQuery to updat
    window.liosetup.addEntityLoadedCallback(function(data){
      if(data.last_make !== ""){
        $('input[name="make"]').val(data.last_make);
      }

      if(data.last_model !== ""){
        $('input[name="model"]').val(data.last_model);
      }

      if(data.last_color !== ""){
        $('input[name="color"]').val(data.last_color);
      }
    });
    </script>
</head>
<body>
  <h2>A Sample Form</h2>
  <form action='' method='post'>
    <label>Make: </label><input type='text' name='make' value='' /><br/>
    <label>Model: </label><input type='text' name='model' value='' /><br/>
    <label>Color: </label><input type='text' name='color' value='' />
  </form>
</body>
</html>
```

This is one basic example of leveraging the current visitor's profile information. The personalization powered by Lyti
 new listings on the site's index page that match a user's last search or present other vehicles that user may be inter

Updated over 1 year ago

Accessing Profiles Server Side

Suggest Edits

Accessing Data from Server Side

By default, Lytics returns a user's profile and any surfaced fields to the browser. This, however, is not always sufficie
oach is to do the lookup based on the user cookie, utilizing the server side language of your choice. First, read the br
y them, make a request to the Personalization to get the visitors current profile, and then surface the profile as a Jav

Identifying the Visitor

Identifying the user can be done in a variety of ways. By default, Lytics sets a cookie seerid that is used to identify a u
_uid field is what the Lytics JavaScript tag uses for web based identity resolution. That said, if users are logged in or id
f seerid in the following examples.

Since we already have a cookie, all we need to do is read those to get the user profile from the Lytics API.

PHP

```
$_COOKIE["seerid"];
```

Get Visitor's Profile

Once you have an identifier, make a GET request to our personalization API. In this example, the cookie value is usec st_make, last_model, last_color. If you are using a custom key value pair for identification, replace the $fieldname pa value with the value of that key.

PHP

```
<?php
  $fieldname = "_uid";
  $value = $_COOKIE["seerid"];
  $apitoken = "{yourapitoken}";

  $url = "https://api.lytics.io/api/entity/user/".$fieldname."/".$value."?fields=last_make,last_model,last_color&key=".$a
  $data = json_decode(file_get_contents($url), true);
  $profile = $data["data"];
?>
```

Surface User Data in the Browser

Next, parse the response and either inject the variables directly into your template or surface the profile as a JavaScr

PHP

```
<?php
  $fieldname = "_uid";
  $value = $_COOKIE["seerid"];
  $apikey = "{yourapitoken}";

  $url = "https://api.lytics.io/api/entity/user/".$fieldname."/".$value."?fields=last_make,last_model,last_color&key=".$a
  $data = json_decode(file_get_contents($url), true);
  $profile = $data["data"];
?>

<html>
<head>
  <script type="text/javascript">
    window.jstag=function(){function t(t){return function(){return t.apply(this,arguments),this}}function n(){var n=["rea
call(arguments)),this._q.push(n)})}var i={_q:[],_c:{},ts:(new Date).getTime(),ver:"2.0.0"},c=Array.prototype.slice;return i.
r(t),this},i.loadtagmgr=function(t){var n=document.createElement("script");n.type="text/javascript",n.async=!0,n.src=t
gName("script")[0];i.parentNode.insertBefore(n,i)},i.ready=n(),i.send=n("send"),i.mock=n("mock"),i.identify=n("identify
c.call(arguments,1)]))}),i.block=t(function(){i._c.blockload=!0}),i.unblock=t(function(){i._c.blockload=!1}),i}(),window.jstag
oadid:false});

      var lyticsProfile = <?php echo json_encode($profile); ?>;
  </script>
</head>
<body>
  Make: <?php echo $profile["last_make"]; ?><br/>
  Model: <?php echo $profile["last_model"]; ?><br/>
  Color: <?php echo $profile["last_color"]; ?>
</body>
</html>
```

Updated over 1 year ago

Working with Anonymous Profiles

Suggest Edits

Anonymous Visitors

Lytics considers anonymous visitors to be users identified only by a _uid. A _uid is a Lytics tracking value assigned to browsers or computers, and aren’t strictly associated with an individual, they are unreliable. For these reasons, Lytic

The User Profile of an Anonymous Visitor
Anonymous visitors can still have rich behavioral data. Every page they visited, the number of times they visited, the time they visited, and behavior patterns for data science models. A User Profile is nothing more than the set of known User Field values associated with the _uid of the Anonymous Visitor.
user profile anonymous empty

Identifying Anonymous Visitors
Since all information about anonymous visitors relies on the continued use of a cookie, it is in a marketer's best interest to convert these unknown users to known users. Cookies are temporary, but email addresses are not.

Note that when a user converts from anonymous to known, all information we knew about them carries with them. When their _uid becomes associated with an email address (or any other By Field), both Profiles (the _uid profile and the email address profile) merge through a process called Identity Resolution.

Updated over 1 year ago
Get Started with Lytics Segments
Suggest Edits
Get Started with Lytics Segments
Lets take an in-depth look at Lytics segments. We'll cover how to define a segment with SegmentQL or SegmentAST,
, scan, and list the segments in your account.

Note that throughout this guide we use the term segment and audience interchangably. Specifically, the term audier
ere is also a separate table and schema for content. A segment on this table is often called a content collection.

Difficulty Beginner

TLDR: Checkout the Segment API documentation.

Other resources:

Lytics Go Client - Lytics API library for the go programming language.
QLBridge - a go SQL Runtime Engine.
Lytics Segment Scan with SQL.
Prerequisites
httpie - (optional) a more user friendly version of cURL that we'll be using in this guide for readability.
Lytics Command Line Tool - (optional) we'll show you how to execute commands with our CLI for each endpoint that
A valid API token for your Lytics account (learn about managing API tokens). For ease of use we suggest adding as an
Bash

export LIOKEY={API Token}
1. Defining A Segment
If you haven't yet, take a minute to check out the audience builder in your account. This can be accessed from the Au
w audience.

The audience builder is a visual interface for what we will cover in the first section of this guide - defining a segment.
nal statement. If the data we have collected on a user meets the conditions of the segment than they are considered
gment definitions: SegmentQL, and SegmentAST.

SegmentQL
SegmentQL is simple Query Language using filter statements. Before we dive too deep into the syntax, lets look at a
mentQL definition.

Example Segment

```
FILTER OR (
  AND (
    cm_status = "active"
```

```
    INCLUDE last_open_7_days
  )
  last_active_ts > "now-7d"
)
FROM user
ALIAS active_web_or_email
```

In this example cm_status refers to the subscriber status in Campaign Monitor, an email provider. So a marketer mig
ross their email and web channels in the last 7 days.

For us developers, this simple query language is probably quite intuitive! Our UI exists for marketers to build audien
te a segment through the API. Just to cover all our bases lets take an in depth look at the anatomy of a filter stateme

FILTER [phrase] [from] [alias]

[phrase] Notes
AND ([phrase], [phrase], ...)
OR ([phrase], [phrase], ...)
NOT [phrase]
EXISTS [identifier] [identifier] is a field name.
[identifier] IN ([literal], [literal], ...)
[identifier] CONTAINS [literal]
[identifier] INTERSECTS ([literal], [literal], ...) INTERSECTS = "contains one of"
[identifier] LIKE [literal] [literal] must be a string. Can use * a wildcard
INCLUDE [identifier] [identifier] is a segment id/slug. (to include existing segment)
[identifier] > [literal]
[identifier] >= [literal]
[identifier] < [literal]
[identifier] <= [literal]
[identifier] = [literal]
[identifier] != [literal]
[identifier] = alphanumeric string (often the name of a data field, table, or segment).
[literal] = a string, int, float, boolean, or timestamp literal value.
[from] Notes
FROM [identifier] [identifier] is the name of the table ie. user, content, etc.
[from] is optional if creating a filter on the user table.
[alias] Notes
ALIAS [identifier] [identifier] is the saved name of the segment.
[alias] is optional if you do not wish to save the segment.

Segment AST

SegmentAST expressions look very similar to SegmentQL but instead of having its own filter syntax it is formatted in
ing a program which creates or updates segment definitions it might be easier to format the bodies of your requests
mentAST.

Example Segment

JSON

```
{
  "op": "or",
    "args": [{
    "op": "and",
    "args": [{
      "op": "=",
      "args": [{
        "ident": "cm_status"
      },
      {
        "val": "active"
      }]
    },
```

```
   {
     "op": "include",
     "args": [{
       "ident": "last_open_7_days"
     }]
   }]
  },
  {
   "op": ">",
   "args": [{
     "ident": "last_active_ts"
   },
   {
     "val": "now-7d"
   }]
  }]
}
```

Definitely not as easy to look at as SegmentQL, but if you spend a second scanning the JSON that you'll see it's gener
nents:

key	type	Notes
op	string	operator used to evaluate the args
args	array	a list of objects containing the identifiers and literals operate on
ident	string	identifier name
val	string	literal value

2. Segment Validate API

The segment validate endpoint accepts a plain text SegmentQL statement and ensures that the definition is valid. Th
g a request to build the segment via the API you might want to validate it first.

Shell

```
echo 'FILTER AND (
  utm_campaigns CONTAINS "summer_froyo_promo",
  EXISTS email,
  scores.momentum > 40
)' | http POST https://api.lytics.io/api/segment/validate access_token==$LIOKEY
```

Note that this endpoint does not validate field names in your account. It simply checks the syntax of the SegmentQL

3. Segment CRUD API

Segment Create

The segment create endpoint accepts plain text (containing SegmentQL) or a JSON body (SegmentQL or AST).

Bash

```
# example 1: plain text
echo 'FILTER (
  lytics_content.Yogurt >= 0.75
)
FROM user
ALIAS affinity_for_yogurt
' | http POST https://api.lytics.io/api/segment Content-type:text/plain access_token==$LIOKEY
```

Bash

```
# example 2: json segmentQL
echo '{
  "name": "High Affinity for Yogurt",
  "segment_ql": "FILTER (lytics_content.Yogurt >= 0.75)",
  "slug_name": "affinity_for_yogurt",
  "is_public": true,
  "description": "Segment containing all users highly interested in the topic Yogurt.",
```

```
  "table": "user"

}' | http POST https://api.lytics.io/api/segment Content-type:application/json access_token==$LIOKEY
```
Bash

```
# example 3: json segmentAST
echo '{
  "name": "High Affinity for Yogurt",
  "slug_name": "affinity_for_yogurt",
  "is_public": true,
  "description": "Segment containing all users highly interested in the topic Yogurt.",
  "table": "user",
  "ast": {
    "op": ">=",
    "args": [{
      "ident": "lytics_content.Yogurt"
    },
    {
      "val": "0.75"
    }]
  }

}' | http POST https://api.lytics.io/api/segment Content-type:application/json access_token==$LIOKEY
```
Segment Read
You must know the segment ID or slug name to fetch the segment via the read endpoint.

Bash

```
# example 1:
http GET https://api.lytics.io/api/segment/affinity_for_yogurt access_token==$LIOKEY
```
Bash

```
# example 2: lytics cli
lytics --segments=affinity_for_yogurt segment
```
Segment Update
You must know the ID or the slug of the segment to update.

Bash

```
echo '{
  "slug_name": "affinity_for_yogurt",
  "segment_ql": "FILTER (lytics_content.Yogurt >= 0.9)"
}' | http PUT https://api.lytics.io/api/segment/affinity_for_yogurt access_token==$LIOKEY
```
Segment Delete
You must know the ID or the slug of the segment to delete.

Bash

```
http DELETE https://api.lytics.io/api/segment/affinity_for_yogurt access_token==$LIOKEY
```
4. Segment List API
For many of the CRUD operations we just talked about you need to know the ID or slug name of the segment. It may
nt to use as a reference. The list endpoint will return a list of all segments for your account including id, slug, and the

Bash

```
# example 1: list all audiences
http GET https://api.lytics.io/api/segment access_token==$LIOKEY
```
Bash

```
# example 2: lytics cli
```

lytics segment
Bash

```
# example 3: list all content collections
http GET https://api.lytics.io/api/segment access_token==$LIOKEY table==content
```

5. Segment Scan API
The scan endpoint provides a list of all entities in a segment. For audiences (segments on the user table) the entities
mber of different query parameters, we won't cover all of them here, but as always you can check out our docs for th

You can use this endpoint to scan an existing, saved segment in which case you'll need the segment ID or slug. You c
nt.

Bash

```
# example 1: existing audience
http GET https://api.lytics.io/api/segment/affinity_for_yogurt/scan access_token==$LIOKEY ortfield==last_purchase_ts
```

Bash

```
# example 2: lytics cli
lytics --id=affinity_for_yogurt segmentscan
```

Bash

```
# example 3: ad-hoc content collection
echo 'FILTER OR (
  global.Yogurt > 0.5,
  global.`Ice Cream` > 0.5
)
FROM content
' | http GET https://api.lytics.io/api/segment/scan access_token==$LIOKEY limit==10
```

Bash

```
# example 4: ad-hoc lytics cli
lytics segmentscan '
FILTER (
  aspects INTERSECTS ("article", "video")
)
FROM content'
```

If the total number of entities in the segment exceeds the limit provided in the request (the default value is 20) then
a token value with the key next. To get the next page of results in the scan, make a subsequent request with the que
he API will continue to return next tokens in each response until you've fully scaned the segment.

What's next?
The endpoints we covered here will get you started with Lytics segments. We do have a couple segment APIs that we
for this is quite simple, check out our docs if you're interested. It also may help to look at the catalog schema and/or
Lytics account. Keep in mind that everything you see in the Lytics web UI is built off of our APIs. It is never "necessary
the time and resources you can build many different custom applications to interface with your Lytics account throu
ting new use cases. If our docs aren't enough you can always reach out to us.

Updated over 1 year ago
Inline Content Recommendations
Suggest Edits
Inline Content Recommendations
Learn how to add seamless content recommendations to your website fueled by Lytics' Content Affinity Engine; all it

Difficulty: Beginner

TLDR: Here's some docs instead.

Other resources:

A blog post - covering basically the same thing - with a live example!
Lytics Segment API Docs (for segment creation API and SegmentQL)
Prerequisites
Lytics Javascript Tag installed on your website.
Pathfora SDK installed on your website. If you're using Lytics for personalized modals, this is already done for you!
Content classified in your Lytics account (go to the content section of your Lytics account to check if we've classified y
A valid API token for your Lytics account (learn about managing API tokens). For ease of use we suggest adding as an
Shell

```
export LIOKEY={API Token}
```

1. Build a Content Collection
Before we go crazy adding recommendations to your website we should think about what kind of content we want t
ill be the target pool of documents for this content recommendation block.

To do this, we can use the Lytics Segment API create endpoint.

Bash

```
curl -s -XPOST "https://api.lytics.io/api/segment" \
  -H "Content-type: text/plain" \
  -H "Authorization: $LIOKEY" \
  -d '
FILTER AND (
  path CONTAINS "froyo/flavors"
)
FROM content
ALIAS froyo_content
' | jq '.'
```

In the command above, we made a POST request to create a new segment on the content table, or as we call it - a co
ntent in your account. In the example above, we're only accepting urls that contain the path froyo/flavors. Simple en
that the logic for building a segment is essentially the same format.

Here's a more complex example:

```
FILTER AND (                   // AND operator on the following statements
  global CONTAINS "strawberry"  // require the topic strawberry
  global CONTAINS "vanilla"     // require the topic vanilla
  path CONTAINS "posts"         // url must contain the path "/posts/"
  published > now-30d           // require published in the last 30 days
)
FROM content                   // entities from the content table
ALIAS strawberry_vanilla       // saved name of the collection
```

You're probably wondering where these field names are coming from! These are the standard fields used in our con
g a content collection:

fieldname	type	description
global	map[string]number	a map of topics for the document and their relevance scores
aspects	[]string	type of document: eg. article, profile, video, etc
primary_video	string	url of the primary video featured in the document
primary_image	string	url of the primary (usually meta image) - can be displayed in recommendation
language	string	language of the documents
wordct	int	word count for the document
author	string	name of the author of the document
product_description	string	description of the product (if the document is of type product)
price	string	price of the product (if the document is of type product)
description	string	title of the document
long_description	string	meta description of the document
url	string	url of the document
path	[]string	list of paths within the url of the document

published□date□date when the document was published
fetched□date□date when the document was fetched and enriched by Lytics
type□string□source channel of the document (eg. web, email, etc)
Also if you have access to your queries in the Data tab of the Lytics UI you can see how the raw data from the lytics_c

2. Set up an inline recommendation
To add inline content recommendations to your website all we have to do is draft some simple HTML. Pathfora will lo
ts of these elements with recommendations from our APIs.

First lets look at a simple, quick example, then we'll break down what these attributes mean:

HTML

```html
<div data-pfblock="froyo_1" data-pfrecommend="froyo_content">
  <img data-pftype="image" alt="frozen yogurt recommendation">
  <h2 data-pftype="title"></h2>
  <p data-pftype="description"></p>
  <p><a data-pftype="url">Read More...</a>
</div>
```

Here's a quick rundown of the relevant data attributes:

attribute name□value description
data-pfblock□a unique name for a single recommended document (there may be multiple documents per page)
data-pfrecommend□id or slug (saved name ALIAS) of the source content collection
data-pftype□field of the document to set as the contents of that element (ex. url, title, description, image, author, pu
image data-pftype attributes will set the src value if applied to an img element (as with the example above) or if usec
ound-image to be the primary image from the document.

Similarly, the url data-pftype attribute will set the href value to the url of the document if applied to an a tag, but oth

Multiple Recommendations
You may have seen a section on blogs "If you liked this, you may also like..." with a list of three or more related article
We repeat the same HTML pattern to create multiple recommendations in a set, just remember to change the data-p
nt collection then we will ensure that the same piece of content is not shown twice on one page.

Here's a more in depth example, with a little CSS this can be easily styled to match your website:

HTML

```html
<h1>Recommended Content</h1>

<!-- Recommendation 1 of 2 -->
<div class="rec-block" data-pfblock="froyo_1" data-pfrecommend="froyo_content">
  <div class="rec-img" data-pftype="image"></div>
  <h2 data-pftype="title"></h2>
  <p class="rec-info">by <span data-pftype="author"></span> on <span data-pftype="published"></span></p>
  <p data-pftype="description"></p>
  <p><a data-pftype="url">Read More...</a>
</div>

<!-- Recommendation 2 of 2 -->
<div class="rec-block" data-pfblock="froyo_2" data-pfrecommend="froyo_content">
  <div class="rec-img" data-pftype="image"></div>
  <h2 data-pftype="title"></h2>
  <p class="rec-info">by <span data-pftype="author"></span> on <span data-pftype="published"></span></p>
  <p data-pftype="description"></p>
  <p><a data-pftype="url">Read More...</a>
</div>
```

Additional Notes
Our SDK may take a second to set the proper hide/show settings for inline elements. If you experience a "flicker" wh

you can add the following CSS line to your website to prevent this:
CSS

[data-pftrigger], [data-pfrecommend] { display: none; }
This exact CSS gets loaded by Pathfora, but adding it to your CSS ensures that elements are hidden as the document

Since this is primarily a developer use case we don't provide any native reporting of inline recommendations at the r
ction data to Lytics or Google Analytics. Check out our Lytics Javascript Tag documentation for more.

If you'd like a "pre-baked" version of inline recommendations, we also have a version that's built from our personaliz

Updated over 1 year ago
Data Collection & Onboarding
Suggest Edits
Welcome to the Data Collection and Onboarding section, where we will explore the process of collecting and onboar
e data quality and accuracy, including how to integrate with various data sources and best practices for data manage
analyst, this section will provide you with the essential knowledge needed to gain deeper insights into customer beh

Updated over 1 year ago

Working with Custom Data
Suggest Edits
Custom Data Sources
Lytics can onboard and process data from custom data sources, helping to build out further User Profiles with data s
or your marketing efforts as it
allows you to personalize web experiences and build meaningful audiences using data unique to your users.

Onboarding process
Unlike data collected from web activity and integrated marketing tools which automatically map data to Lytics user fi
mplementation process. The Lytics team will assist in identifying use cases and the data fields needed to achieve the
s the structure, format, location and relationship of your data. The data dictionary is used to write queries which map
inally your custom data is uploaded to the Lytics and made available for use to build audiences, personalize web exp

Uploading custom data
Data can be uploaded to Lytics via CSV SFTP upload or our collection APIs. Lytics can ingest both large, bulk uploads
re uploading data to Lytics, ensure all necessary LQL queries are in place or it will not be mapped to Lytics user fields
oads to the Lytics platform, be aware that this may cause an event backlog on your account. This occurs as our platfo
e upload. Processing begins when the upload completes and can last considerably longer than the initial upload. Thi
n your account as well as delays in any outbound, trigger-based workflows.

Custom Data Ingestion
Getting your custom data ready to be properly ingested is crucial during your onboarding process with Lytics. This do
om data sources sent to Lytics via batch CSV or JSON, utilizing S3 or SFTP import workflows, as well as batch or real-t

File naming
File compression
Field formatting
Headers
Timestamps
JSON formatting
File naming
When you have a recurring bulk import, from S3 or SFTP for example, you must consistently follow naming conventi

Keep file naming consistent by determining casing and spacing.
E.g. all lower-case, use underscores for spaces: file_source_1_date.
Name each successive file with an identical 'root' along with a time-based suffix such as YYYYMMDD in filetitle-20191
Lytics will import files that match the 'root' filename and will use the modified timestamp of the file to determine the
port for continuous imports.
File compression
If needed, files may be compressed using the zip format prior to ingestion. The zip file will be decompressed and del

Field formatting
Phone numbers should be standardized. Lytics suggests normalizing phone numbers in a format such as 12223334
Omit double quotes or escape quotes.
Omit newlines.
Keep all free form text in quotes if possible.
Avoid page breaks or special characters.
For more, reference the basic rules for CSV files.

Headers
Keep headers consistent across your organization and your vendors by determining casing and spacing.
Column headers have to match the sample file exactly.
When adding a new source, review current mappings and headers to determine if any headers need to be mapped
E.g. if the field mobile comes in from source A, and the field cell comes in from source B, it's likely these should be m
dification.
Timestamps
Lytics is able to ingest data in a different order than the events described in that data transpired. For this to work, in
ed with them. For workflow-based imports, select the key/column which contains the event timestamp when import
p field URL parameter.

All imports require the following format: YYYY-MM-DDTHH:MM:S. If an explicit timestamp is not specified, the data w

When Lytics looks for new files, it will choose first based on the file's last modified date. If multiple files have the sam
used to select the next file to import.

JSON formatting
JSON file formatting varies slightly depending on the method and nature of the data to import. See examples for bul

Bulk
Files imported via S3, SFTP, or bulk collection should be newline delimited, meaning each object represents a single

```
{"event":"register","date":"2014/04/05"}
{"event":"login","date":"2014/04/05"}
```

Real-time
Files sent to collection should be formatted as regular JSON, where each record/event is an object in an array of obje

```
[
 {"event":"register","date":"2014/04/05"},
 {"event":"login","date":"2014/04/05"}
]
```

Lytics has a limited ability to parse nested data. Objects may contain other objects and arrays, but objects may not c

Updated about 1 year ago
Working with Web Data
Suggest Edits
Onboarding Web Data
Lytics provides two ways to onboard data from your website, email marketing, and online advertising. The Lytics Jav
ty data. The Lytics pixel can be embedded in email or ads and configured to send user data back to Lytics on load.

Lytics JavaScript Tag
The Lytics JavaScript tag sends page views and any custom events you have configured to the default stream (unless
r fields in the Lytics schema with predefined or custom mappings. For example, the following request would send a

JavaScript

```
jstag.send({
```

```
  "email": "gump@hanks-roles.com",
  "first_name": "Forrest",
  "last_name": "Gump",
})
```

Using a tag manager

Our tag can be installed manually or with a tag manager such as Google Tag Manager. If the Lytics JavaScript tag is in
the correct function to call.

Lytics Image Pixel

When the Lytics JavaScript tag cannot be installed, the Lytics Image Pixel can be used to onboard user data from any
ne ads.

Building the pixel

There are three key variables that need to be defined when sending information to Lytics using the Lytics Image Pixe
 event data in the form of query parameters. For example, this pixel will send the user’s email address and Google U
ault stream of account 24546133b65465413w9.

HTML

```
<img src="https://c.lytics.io/c/12324546133b65465413w9/default?email=woody@hanks-roles.com&&utm_medium=e
```

This image tag can be inserted into any HTML document including advertisements and emails and will send the even

HTML

```
<html>
   <head />
   <body>
      <h1>Welcome to Hanks Roles!</h1>
      <p>Thanks for signing up for all the Tom Hanks news you handle.</p>

      <!-- lytics pixel at bottom of email -->
      <img src="https://c.lytics.io/c/12324546133b65465413w9/default?email=woody@hanks-roles.com&utm_mediur
   </body>
</html>
```

Predefined user fields

Lytics does not have a fixed schema, any key-value pair can be passed using the JavaScript tag or pixel. However, onl
r use in audiences. Out of the box, the Lytics JavaScript Tag and Image Pixel have the ability to onboard the following

General Visit Data
NameIdentifier
Time of Last Visitlastvist_ts
Time of First Visitfirstvisit_ts
Total Number of Visitsvisitct
All Channels Usedchannels
Web Events By Hourhourly
Web Events By Weekweekly
Domains Visiteddomains
Domains Referred Fromrefdomain
Devices Useddevices
Has Accessed Mobile Webis_mobile
Last Visit Countryvisit_country
Last Visit Cityvisit_city
Last Visit State/Provincevisit_region
Timezonetimezone
User is a botis_bot
User Agentuser_agent
Hashed URLs Visited and Total View Counthashurls
User Identity
NameIdentifier
Web Cookie ID_uid

User ID	user_id
Full Name	name
First Name	first_name
Last Name	last_name
Email	email
Title	title
Company	company
Phone Number	phone
Cell Number	cell
Age	age
Gender	gender
City	city
State	state
Zip	zip
Country	country
Origin	origin
User Status	status

Event Data

Events regarding specific user actions such as a CTA click can also be sent to Lytics. In addition to any of the paramet
e send request resulting in a few more fields on the profile:

Name	Identifier
Total Pageview Count	pageviewct
Event First Time Seen	event_first_seen
Event Last Time Seen	event_last_seen

Campaign Data (Google UTM)

Google UTM campaign parameters are automatically pulled in and added to profiles as well. For more details on Goo
he following fields will be added to the profile when UTM parameters are received:

Name	Identifier
UTM Campaign Referred By	utm_campaign
UTM Source Referred By	utm_source
UTM Medium Referred By	utm_medium
UTM Content Referred By	utm_content
Last UTM Campaign Referred By	utm_campaign_last
Last UTM Source Referred By	utm_source_last
Last UTM Medium Referred By	utm_medium_last
Last UTM Contents Referred By	utm_content_last

Form Data

In order to collect data entered on a form, you will need to use jstag.send() when a user submits that form. The fields
nt as form_name, and any fields in the form need to start with formdata_, for example formdata_country.

Name	Identifier
Last Time Web Form Submitted	last_form_submitted_by_date
Web Forms Submitted	form_submitted
Web Form Data	form_data

Conversion Data

As a convenience, a standard conversion event has been defined in order to surface some useful conversion related
rsion time. When passing conversion events, the event name must be "conversion" for the following mapping to occu

Name	Identifier
Most Recent Conversion Time	cvt_last_time
Oldest Conversion Time	cvt_first_time
Most Recent Campaign Attributed to Conversion	cvt_last_campaign
All Campaigns Converted From	cvt_campaigns
Most Recent Variation Attributed to Conversion	cvt_last_variation
All Variations Converted From	cvt_variations
Most Recent Currency Used	cvt_currency
Most Recent Conversion Value	cvt_value
Conversion Values By Campaign	cvt_history

Updated about 2 months ago

Collect Mobile Data with Firebase + GTM
Suggest Edits
The following tutorial provides step-by-step guidance for setting up, configuring, and testing data collection from a m
le Tag Manager (GTM). This is an excellent alternative for minimizing the number of SDKs that must be deployed fror
solution in Firebase Analytics using GA4.

In this tutorial, we'll cover the following steps:

Setting up Firebase and installing the SDK.
Setting up Google Tag Manager and installing the SDK.
Configuring the Lytics Image Pixel collection method.
Testing the implementation end-to-end.
Benefits
Events are delivered to Lytics in real-time.
Reduces the number of SDKs installed.
Leverages Google-managed SDKs to streamline app approval.
Easy access to advanced testing and debugging tools.
Automatically passes events to Google Analytics or analysis or further delivery to BigQuery.
Install Firebase SDK
This solution leverages Firebase Analytics which Google Analytics powers under the hood. This means that in additio
rage Google Analytics and its direct integrations to other Google products such as BigQuery as an automatic value ac

Google provides thorough documentation for getting a Firebase project set up and installed in your platform of choi
firebase-1

Once you have completed the setup and made it to the Start logging events section of the documentation, you are re
er the documentation, either way, we'll come back here further down in this tutorial.

Install Google Tag Manager SDK
Next, we'll leverage Google Tag Manager, which offers seamless integration with Firebase Analytics to forward events
lent documentation for getting a Google Tag Manager account set up and the iOS or Android SDKs configured.
gtm-2

Sending User Properties & Events
Now that we have configured Firebase and Google Tag Manager, we are ready to start configuring and sending our e
interaction-based events easy. For more details on the power of Firebase, you can revisit the Start Logging Events se

```
Analytics.logEvent("did_something", parameters: [
  "_uid": UUID().uuidString,
  "lytics_test_key": "some value",
])
```

The above represents an example of a custom event named did_something. For that event, we also include two para
ou and should be in support of your use case. Keep a record of the parameters used, as you will need to explicitly de

That said, including an identifier of some for every event is essential to your identity resolution strategy. In the above
ers. Consult your account manager or solutions team for the optimal approach here. Regardless of the approach, it i
to generate and store a value on the device. For this step, it is best to consult your app development team.

One example would be to use Swift's UUID to generate a unique user identifier and store it using UserDefaults. The r
t on the results. It is only essential to include that value in all events and have it persist for as long as possible. On tha
lude multiple identifiers such as email, or IDFA, to maximize the match rate.

Configuring Google Tag Manager for Event Forwarding
The final step in getting user details from your app to Lytics is configuring your Google Tag Manager Container. We'll
s in your events from your app. Based on our example, we'll define two variables: _uid and lytics_test_key.

Step One

From the Google Tag Manager dashboard, navigate to Variables in the left-hand menu.
step1-3

Step Two
Create a new variable, one for each parameter, using the New button. In the new window that loads, click Choose a v
you can use any variable type based on your needs. Event Name may also prove helpful in adding more context to th
variable-4

Step Three
Finish your variable configuration by selecting Custom Parameter, followed by inputting one of the parameter name
 of an empty string. Save your settings and move to the next parameter until you have created a variable for all para
variable2-5

Step Four
With your variables defined, we'll move on to creating a new Tag within our container. Select Tags from the left-hand
wing window, click Choose a tag type and select Custom Image.
tag-6

Step Five
With your tag type selected, we'll configure the Image URL as well as the Triggering rules. The Image URL will leverag
l need to know your Account ID.

For simplicity, we'll break the full URL into two parts that will be joined together in actual execution.

Focusing first on the path, everything from https up to the ? you will need to replace the YOUR-AID portion of the pat
h to your desired ingest stream.

https://c.lytics.io/c/YOUR-AID/STREAM
The query parameters will contain the field name you'd like to pass to Lytics, as well as a value that is populated by r

?_uid={{Lytics UID}}&lytics_test_key={{Lytics Test Key}}
Putting those two parts together results in the final value of the Image URL in our config.

https://c.lytics.io/c/myaccountid123/mobileevents?_uid={{Lytics UID}}&lytics_test_key={{Lytics Test Key}}
Last we'll configure the event that triggers our forward by selecting All Events.
tagconfig-7

Step Six
With our tag defined, the final step is publishing the Google Tag Manager container and storing the config that is ger
rovides instructions for doing so.

Test & Debug Implementation
With our implementation all configured, the final step is to test and debug. Each of the steps defined above supports
es below.

Firebase Event Debugger
Google Tag Manager Debugger
Lytics Data Streams: Once successfully tested, you can do the final validation by reviewing your incoming data as par
Updated over 1 year ago
Data Management
Suggest Edits
Welcome to the Data Management section, where we will explore the various tools and techniques available within t
his section covers how to ensure data accuracy and completeness, including data validation, deduplication, and tran
dministrator, this section will provide you with the essential knowledge needed to manage your customer data and g

Updated over 1 year ago
Profile Stitching Best Practices

Suggest Edits
Stitching User Profiles
This guide gives context on Lytics user profiles and helps illustrate the most common ways to combine or stitch prof
s, you will likely need a developer on your team to implement some of these tactics.

The problem
“How do I know that an anonymous user browsing my website is the same user that just opened my email?”

“How can I make sure I am not over-marketing to the same user because I can’t tell who they are across all my data s

“How do I achieve 1:1 personalization without a single source of truth for my users?”

How Lytics helps
Lytics aims to solve these problems by creating a holistic customer view through data unification. Lytics is based on u
ied to a user. A user profile is generated and defined by an identifier:

For anonymous users, this identifier can be the Lytics cookie placed after you install the Lytics JavaScript tag.

For known users, this is most commonly an email, but can also be various forms of user IDs across your data source

Richer profiles that include attributes from various data sources allow marketers to run their campaigns more efficie
tion, cost per action (CPA), among other results. Therefore, profile stitching early on in your journey with Lytics will b
m.

But how does Lytics actually stitch your Customer Relationship Management (CRM) users, to your web browsers, to y
ed between tools.

Common identifiers
A common identifier is used by Lytics to create a user profile, but it’s one that also exists in another source. Some ex

User 1: Imported from email tool

Identifier: email address (abc@123.com)

User 2: Imported from CRM

Identifier: email address (abc@123.com), user ID (0101010)

User 3: Imported from data warehouse

Identifier: user ID (0101010)

All of these users will merge into one profile in Lytics because they share identifiers. This will happen automatically a
merge event.

Merging events
But how would you merge an anonymous profile that ONLY has a cookie ID with a profile that has a known identifier
rs, and one that will set you up for success.

To do this, you’ll need to identify or create potential merge events. Again, more details can be found in the Profiles a
les of common scenarios that you may consider when planning your strategy.

Lytics Modal Experiences
You can build Email Capture Modal Experiences directly in Lytics that prompt users to sign up for an e-newsletter, or
 email, Lytics will tie the anonymous cookie profile to the email they submitted.

If their email was already in our system under a different profile, Lytics will merge the two profiles into one. For infor
ience Editor documentation.

On-site events: forms

Any of your website forms where a user submits an email are great places to create a merge event of a Lytics cookie
Tag Manager Trigger, Lytics can attach an email to an anonymous profile. Some types of commonly used forms inclu

User log-in
Any sign-ups (events, newsletters)
Registrations / warranties (products)
Gated content (webinars, whitepapers)
Note that you can submit other data using this method. For example, if users fill in their name, profession, address, c
end it to their profile.

Tip: You can also send Lytics a form name and timestamp using this method, which could be helpful if you'd like to re
period.

Keep in mind this will only work for forms living on your website. For forms populated in an iframe or hosted in a dif
to capture this information.

See the document Sending Data to Lytics for more information on using the JavaScript tag and other methods.

Email click-through identifier
Many email service providers (ESPs) have a unique user ID within their system, separate from email. It's encouraged
ifier as a query string parameter within links you include in any email communication. If you are familiar with UTM pa

Once you set this up in your ESP, Lytics can associate this additional identifier as another merge rule. So moving forv
to your website with the Lytics tag, Lytics will be able to stitch the email to a cookie.

Examples:

domain.com/news/article_name?<your_esp_identifier_or_hashed_email_name>=<value>
domain.com/news/article_name?esp_id=2ncihj894y2jnjknfjsd
Tracking growth
Next, you can create an audience in Lytics to track the growth of profiles that have stitched a cookie to an email. An e
ilder is shown below:
stitching guide img 2

On the Audience Summary page, you can view how your audience of unknown to known users has grown over time.

unknown-known-audience-summary

Updated about 1 year ago
Migrating from Queries to Conductor Schema
Suggest Edits
Deep Dive: Migrating from Queries to Conductor Schema
TL;DR: Many things you liked about LQL are still here, and many things you didn't like are out. Migrating your schema
your workflows.

Intro
Lytics' profile pipeline processes your customer data in real-time to perform data cleansing, data transformation, da

Historically, these functions were performed in an expressive SQL-like scripting language called LQL. After listening t
hey developed to ensure reliability while enabling process scalability, we introduced a new Schema API. Conductor p

Longtime Lytics users who are comfortable with LQL have appreciated:

Brevity: LQL combined both data definition (DDL) and data manipulation (DML).
Readability: LQL reads similarly to SQL, which makes sense to a lot of database practitioners.
Longtime Lytics users who were uncomfortable with LQL didn't appreciate:

DRY violations: A common development mantra states Don't Repeat Yourself (DRY). Repeating your code in multiple
ments mapping data into the same field could yield inconsistent or unexpected results.
Lack of versioning: When you post LQL, you're doing it live! This can be problematic when there are large changesets

at changed at a given time.
Learning curve: Not every update needs to be complicated, and requiring users to learn LQL to make even small cha
Lytics' new Schema API allows you to use LQL expressions within a JSON framework with native version control.

Analogs
An LQL statement combines features of data definition and data manipulation. In the Schema API, data definition is
gh mappings.

Field Analog Properties
LQLSchema API
ASID
SHORTDESCShortDesc
LONGDESCLongDesc
KINDType
MERGEOPMergeOp
CAPCapacity, KeepDays
BYIsIdentifier
Mapping Analog Properties
LQLSchema API
–ID
ASField
FROMStream
KINDExpr
IFGuard
Example
Imagine we had the following simple LQL Select statement processing data from a "purchases" data stream. This sta
s been refunded over their lifetime.

SQL

```
SELECT
  SUM(order_total) AS `refunded` IF eq(type, "refund") SHORTDESC "Refund Amount" LONGDESC "Total USD refunde
  email(email)     AS `email`                         SHORTDESC "Email Address"
FROM orders
INTO user
BY email
```

Instead of providing these definitions and transformations in a single statement, we would first create the fields into
the email and refunded fields would look like the following.

JSON

```
[
  {
    "id": "email",
    "shortdesc": "Email Address",
    "type": "string",
    "mergeop": "latest",
    "is_identifier": true
  },
  {
    "id": "refunded",
    "shortdesc": "Refund Amount",
    "longdesc": "Total USD refunded",
    "type": "number",
    "mergeop": "latest"
  }
]
```

Once we've defined the fields, we would define the mappings for both, which would look like the following.

JSON

```json
[
  {
    "id": "abc123",
    "field": "refunded",
    "stream": "orders",
    "expr": "SUM(order_total)",
    "guard": "eq(type, \"refund\")"
  },
  {
    "id": "def456",
    "field": "email",
    "stream": "orders",
    "expr": "email(email)"
  }
]
```

After creating fields and mappings for the desired schema changes, simply publish your changes to see their effect i

How to Get Started
Getting started is simple. All of your queries have been automatically translated into appropriate fields and mapping

It is recommended to immediately publish your default schema before making any changes to it. After it has been pu isibility on what changes go out.

While you're not required to immediately start using Lytics' new Schema API, the classic Query API will be deprecated

Updated 11 months ago
LQL & Data Import Basics
Suggest Edits
LQL & Data Import Basics
Let's take an in-depth look at Lytics Query Language (LQL) and custom data imports. We'll cover a basic overview of I you can map custom data and finally a few of the different ways to import custom data into your account.

Difficulty: Intermediate

TLDR: Checkout the data upload documentation and the query documentation.

Prerequisites
httpie - (optional) a more user friendly version of cURL that we'll be using in this guide for readability.
Lytics Command Line Tool - (optional) we'll show you how to execute commands with our CLI for each endpoint that
A valid API token for your Lytics account (learn about managing API tokens). For ease of use we suggest adding as an
Bash

```bash
export LIOKEY={API Token}
```

1. Lytics Data Processing Review
Due to the intermediate nature of this course it is important that you already possess a strong understanding of seg ics data pipeline we recommend reviewing the following documentation before proceeding with the rest of the steps

Introduction: Lytics Data Collection
Introduction: Lytics User Profiles & User Fields
Introduction: Lytics Audiences
2. Sending Data from a Website (JavaScript)
When the Lytics JavaScript tag is installed we will automatically begin collecting standard data. This includes page-vie tc. In addition to the standard page-view event the Lytics tag empowers marketers to push more sophisticated data

An example of such data to a custom stream called custom_data might look something like:

JavaScript

```
jstag.send('custom_data', {
  userid: "1234",
  email: "jon@castleblack.com",
  first_name: "Jon",
  last_name: "Snow",
  title: "King in the North",
  company: "House Stark",
  phone: "555-555-5555",
  age: 21,
  gender: "m",
  city: "Winterfell",
  state: "Westeros",
  status: "planning"
});
```

While visiting your site that has the Lytics JavaScript tag installed you can leverage Chrome's developer tools, specific
ass the payload above to Lytics. Keep in mind, all data sent from your browser will automatically be associated with y
e to always use a fresh incognito browser. Chrome tools has great documentation if they are new to you as well.

Check out our JavaScript tag data collection docs for more details on the power of the Lytics tag.

3. What is LQL?

Lytics Query Language(LQL) is the transformation layer that makes passing arbitrary, non-schema specific data to Ly
ion of raw event data to user field data, the Lytics schema. In more advanced implementations complex calculations
d more. An example might be rolling all purchase_total values for individual conversions into a purchase_total_over_
le.

LQL is very powerful and we recommend working directly with our services team to get the most out of it. We also h
ower.

As mentioned in our documentation, LQL can be broken down into 6 key components:

SELECT

Select data to be added to user profiles. Including Maps, Counts, and other complex data types. As an example from
he custom field current_status in order to unify data across streams. In that case your select statement would be so

```
status     AS current_status     SHORTDESC "Current Status of a User"
```

where status is the key name from the event stream and current_status is the field name that is used across multiple
t particular field in order to simplify working with the data inside the Lytics admin.

FROM

The stream to select from. In our example case this would simply be:

```
FROM custom_data
```

INTO

This is USER for all user profiles. (technically you could create other types, such as “account”).

```
INTO user
```

WHERE

Filters out entire records to not be included/analyzed. Bots, Employees, Test data. In our example we might want to

```
WHERE
    city = "Winterfell"
```

BY

What field are we going to identify this entity by. This is among the most important aspects of LQL. This defines whic
nto a user profile. For instance:

BY email OR userid
Means that anytime an email address or userid matches, regardless of its origin, we can assume that is the same use

ALIAS
The alias is primarily an internal value of how to reference this particular LQL statement. When accessing LQL throug

```
ALIAS custom_lql_example
```

4. Writing LQL
Now that we know the basics of LQL we can put it all together in such a way that our sample data sent can be mappe
iking the end product might look something like:

```
/*
   Custom User Data Example
*/
SELECT

   userid           AS user_id         SHORTDESC "Users ID"
   , email          AS email           SHORTDESC "Email Address"
   , first_name     AS first_name      SHORTDESC "First Name"
   , last_name      AS last_name       SHORTDESC "Last Name"
   , set(title)     AS title           SHORTDESC "Job Title"
   , set(company)   AS company         SHORTDESC "Company Name"
   , phone          AS phone           SHORTDESC "Phone Number"
   , age            AS age             SHORTDESC "Age"             KIND INT
   , gender         AS gender          SHORTDESC "Gender"
   , city           AS city            SHORTDESC "City"
   , state          AS state           SHORTDESC "State"
   , status         AS status          SHORTDESC "Current Status"

FROM custom_data
INTO user BY email OR user_id
ALIAS custom_data_example
```

All that is left once we have completed writing is to save our LQL file. This file name is completely up to you but shou
st our LQL before uploading it to our account.

5. Testing LQL
Install Lytics CLI
Now that we have our LQL saved locally using the .lql extension we are ready to test. To test we will use the Lytics CL
d on Github.

Once we have installed the CLI tool lets verify it is working properly. In the terminal of your choice run the following c

Bash

```
$ lytics -h
```

If you are presented with a help menu you are good to go, if an error comes back or something was not found we re
nfigured.

Create a Sample CSV
The Lytics CLI can test LQL in two ways. First, it will read some of the recent events from the target stream and show
tering existing LQL but may present challenges when you are writing net new LQL on data that has not been sent to
m locally. In addition, though not demonstrated here, Lytics watch can also use a JSON file locally in addition to the C

CSV's can be created using a variety of tools. When creating your own CSV from scratch just ensure that the first row
each following row represents an individual user's data.

```
_created□_modified□user_id□email□first_name□last_name□title□company□phone□age□gender□city□state□status
2017-07-27T03:04:04.960952144Z□2017-07-27T03:04:04.960952144Z□1234□jon@castleblack.com□Jon□Snow□King ir
```

When saving your CSV ensure the file name matches that of your lql with .csv in place of .lql. For instance if your LQL
sample_file.csv and be located in the same directory. The Lytics CLI will look for CSVs with the same file name as you

Activate Lytics Watch

Lytics watch will listen for changes to your LQL file. When that happens it will take the CSV or recent data from your s
lation is then output into your terminal in order to validate that all mappings are working properly.

JSON

```
{
  "_created": "2017-07-27T03:04:04.960952144Z",
  "_modified": "2017-07-27T03:04:04.960952144Z",
  "user_id": "1234",
  "email": "jon@castleblack.com",
  "first_name": "Jon",
  "last_name": "Snow",
  "title": "King in the North",
  "company": "House Stark",
  "phone": "555-555-5555",
  "age": 21,
  "gender": "m",
  "city": "Winterfell",
  "state": "Westeros",
  "status": "planning"
}
```

6. Uploading LQL to an Account

NOTE: Please be sure you are using the correct API token when performing the next operation. To check which API y

Shell

```
$ echo $LIOKEY
```

The value output should match the API token pulled from your account. If this is not the case please revisit the prere

Query POST Request

To upload the query you will make a simple POST request to our API. Upon a successful upload you will get a respon

Bash

```
$ https POST https://api.lytics.io/api/query access_token==$LIOKEY < my_custom_lql_file_name.lql
```

7. Importing a CSV

Finally we can import our CSV using a standard cURL command. Be sure to update your file and stream name in the

Bash

```
curl -s -H "Authorization: $LIOKEY" \
  -H 'Content-type: application/csv' \
  --data-binary @your_file_name.csv \
  "https://bulk.lytics.io/collect/bulk/your_stream_name"
```

What's next?

We've covered a basic example of getting custom data into Lytics. This is very much just the beginning of how LQL ca
explore all of our technical docs and reach out to our services team for more in-depth training on LQL and data man

Updated 10 months ago

Acquire New Customers with Lytics

Suggest Edits

Customer acquisition is a core focus for all marketing departments. Traditionally, B2C marketers have relied upon sp
ad placements. However, these teams often do not have access to key customer data, and thus have to rely upon th
d agencies typically do not have access to personalize the customer experience on site.

There is a better way. First-party data can be extremely valuable for ad targeting on certain networks, and marketers
nces.

The following is the Lytics Playbook for acquiring new customers.

The framework
There are two important concepts within acquisition marketing as it pertains to Lytics:

Driving traffic: advertise to relevant audiences by using your first-party data.
Generating leads: deliver personalized experiences to new visitors to create leads.
How Lytics helps
Lytics helps marketers to drive quality traffic by unleashing streams of powerful first-party data to ad platforms such
for building lookalike audiences.

How effective is this? Most companies see their return on ad spend (ROAS) of campaigns on these platforms improve

Using your first-party data, Lytics helps to improve the retargeting of your past visitors in two main ways: by identifyi
o is most likely to return.

You can then use Lytics to target personalized experiences on site to encourage the right visitors to sign up for your
d visitors who could/should be targeted with offers and content to drive a first purchase.

The playbook
Step 1: Send all customers to ad platforms for suppression
Why would you want to throw valuable acquisition dollars on a wasteful audience of existing customers? The answer
eryone is) because they don't have a good source for this audience. With Lytics, you can send all customers to Faceb
from lead generating advertising.

Effort	Impact	Developer Required
Low	Medium	No

Building the audience

The key to building the right audience is to include all the customers and/or free subscribers you don't want to spend
cumentation to get started. The following examples skip the first few steps and jump right into building custom audi

For most companies, an audience to suppress would resemble something like this:
All customers sample audience

Be sure to suppress active users on all your lists and products. This will give the most comprehensive set of custome

Export a continuously updated file

Export these audiences to the key ad platforms: Google Ads, Facebook and, Yahoo Ads.

Build suppression in your ad campaigns

And then create suppression lists in your ad campaigns. See the respective help docs for more information on Faceb

Step 2: Build lookalikes of your best customers
If you're using lookalikes of your customer file as a targeting audience, it's likely already the best performing audienc
le or the 80/20 Rule? 80% of your revenue comes from 20% of your customers. For most companies, it's more like 90

If you can build lookalikes off your absolute best customers, you'll help Google, Facebook, and Verizon Media to iden

Effort	Impact	Developer Required
Low	High	No

Building the audience

In order to help train the big ad platforms as to who your best users are, send the audience over that most resemble
ople with a high lifetime value (LTV) or multiple purchases. For example, your audiences might look like this:

audience-high-ltv-example

Note that there are several ways to determine high LTV, so feel free to customize to your specific requirements. The
your best customers, not lookalikes of all customers.

Export a continuously updated file

Export these audiences to the key ad platforms: Google Ads, Facebook and, Yahoo Ads.

Build lookalikes in your campaigns

Build a lookalike in Facebook or a “similar audience” (lookalike) in Google Ads.

Step 3: Setup data science based remarketing audiences
The next step is to route audiences to the most impactful remarketing campaigns. For example, you may have certai
tent affinity over another. Additionally, you probably want to consider engagement-based suppressions for remarke

Effort	Impact	Developer Required
Low	Medium	No

Building the audience

Think through which content affinities best align to your creatives. For example, break out your core audiences base
 the following:

audience-marketer-affinity

...or the user might belong to this group:

audience-technical-affinity

You can and should use “Any Affinity” to start. You’ll note that users with any affinity for a topic show above-average
y limiting to “High Affinity.”

Also, be thinking about the likelihood of a user to re-engage. Typically, your time window of attention is very short. C
Predictive Modeling of interactions may also play a role. Your audience might look something like the following:
audience-score-example

Exporting the audience

Anonymous audiences are continuously exported from the Lytics JavaScript Tag to Facebook and Google Analytics ta

Continue with step-by-step instructions to promote relevant content to users based on their interests.

Step 4: Collect emails
As we mentioned at the start of this playbook, acquisition marketers seldom have the ability to personalize web lanc
ing your acquisition marketing game is to extend the lead generating efforts to your site with targeted email collectio

Effort	Impact	Developer Required
Low-medium	Medium-high	No, but useful for customizing the look and feel

Building the audience

Don’t taint the user experience with untargeted email collection. For known users, suppress your email collection ex
audience-build-email

Building email collection campaigns

See the Experience editor doc for how to set up this type of campaign in Lytics. The Pathfora SDK allows easy custom
personalize-example

Continue with step-by-step instructions on how to grow your email marketing list.

Step 5: Targeted offers
Many prospective customers will need an additional nudge to make a first purchase. The big advantage of using Lyti
il, and ads. This consistent approach between channels frequently provides up to a 10% lift in conversion rates.

Effort	Impact	Developer Required
Low-medium	Medium-high	No, but useful for customizing the look and feel

Building the audience

Your audience can be limited to non-customers for special incentives, and may include engagement filters or price s
This is a common starting audience:

audience-known-non-customers-example

As a final note, keep in mind there are many other areas to cover including copy choices, optimizations, and commo
ut should be taken into consideration while developing your marketing strategy to acquire new customers.

Updated over 1 year ago

Best Practices for Personalizing Your Ad or Search Landing Page
Suggest Edits
Today's most popular ad platforms, such as Google and Facebook, care a great deal about the overall user experien
he landing page or associated content. It is imperative that both the content and overall experience be considered w

Personalized modals are no exception to this rule. In fact, when not approached strategically, modals may negatively
the simplest of terms, an auction occurs to determine which ad(s) are served to any given user. Ads with bad experie
being eliminated entirely from the candidate pool to make room for ads with more potential.

Google Ad Rank Overview
Additional Information About Google Ad Position and Ad Rank
Facebook Ads Targeting & Positioning Policy
Facebook Low Quality or Disruptive Content Policy
There is, however, a silver lining. Gone are the days of blanket marketing initiatives which force an experience that m
the many. With Lytics, you gain an understanding of each individual's past behavior or lack thereof in real-time. This
that is relevant, personalized and positive. Which in turn is the best way to get the highest return from your ad and s

The topic of ad and landing page optimization is broad. We simply could not cover all important aspects here. Rathe
keep in mind as you develop your marketing and personalization strategies. In addition, some may find the followin
essions or other anomalies in performance.

1. Targeting
Though it may be obvious, considering who you're targeting with modals is extremely important and often overlook
isiting a site for the very first time, it is unlikely your experience will be positive if the vast majority of the site that yo
soon as the page loads.

Example of full page takeover on the second click of a user's first visit before they had a chance to explore the brand
purple-popup

Example of half page takeover on user's first visit.
neilpatel-popup

Added for comedic value. First page view popup on article talking about discussion one of Google's many announce
random-popup

Because Lytics allows you to target users based on profile details, audience membership and behavior in real-time, p
ing a bit more bold with visitors showing strong signs of conversion or history with your brand.

It is all too common on the web today to see companies take a "spray and pray" marketing approach where all visito
beginning of their experience. This is seen as a negative for nearly all search and ad providers, many of which addre

Google Blog Post Addressing Mobile Popups
2. Modal Size & Position
To build on Targeting, there may be cases where delivering a message at the beginning of a visit is important and ac
where that message is delivered. Does it cover prime real estate requiring the user to alter their patterns in order to
t and offer a more efficient path to value while not restricting consumption? There is no silver bullet here but testing
d great results.

3. Device
The device being used is often not considered when attempting to locate the root cause of a negative change. Keep i
ically different from device to device. A modal that is not intrusive on desktop may cover the entire canvas on mobile
vices are suffering from a drop off. Follow up by altering the targeting and presentation based on device or consider
mobile.

Example of cookie acceptance modal on desktop - small and not disruptive.
nextweb-deskop

Example of cookie acceptance modal on mobile - much larger and more disruptive.
nextweb-mobile

4. Time on Site & Session Depth
As we mentioned in our first example where the visitor received an offer immediately upon their first page view, one
rs a variety of display options which allow you to only show the modal after a set amount of seconds, after some am
s delivered after a visitor has made a connection and consumed enough content in order to make the modal experie

5. Inline Personalization
The Lytics web personalization SDK is one method for delivering personalized communications on site. It was design
he needs of every use case. As such, the Lytics JavaScript tagand various Personalization APIs can be leveraged in mo
content in virtually any situation.

At the end of the day, the user experience is everything and this should be a core focus of all marketing applications
s.

Updated 10 months ago
Capture More Information from Qualified Leads
Suggest Edits
Converting a user from unknown to known is a key part of many marketing journeys. You can use Lytics web Experie
nt, you may want to collect a bit more information from your user when they subscribe to your brand.

In this guide, you will learn how to create a widget with a custom form component. The example will offer users to su
field as well as list of checkboxes that can be used to select which topics to subscribe to.

Custom Form

You can download the complete JavaScript configuration, CSS, and API override command for this example from the

Currently in the Lytics UI, you may only choose to include the following fields in your capture leads form:

Email (Email input)
Name (Text input)
Job Title (Text input)
Company (Text input)
Phone Number (Text input)
Message (Text area)

Country (Select box)
However, with the Pathfora SDK, or using API overrides, you can include any custom field of the following types:

Text input
Email input
Text area
Select box
Checkboxes
Radio buttons
JavaScript Configuration
Begin with a configuration for a form widget. Without defining any field customizations, Pathfora will default to using
elements in this guide.

JavaScript

```
var customFormWidget = window.pathfora.Form({
  id: "custom-form-widget",
  layout: "slideout",
  position: "bottom-left",
  className: "custom-form-widget",
  headline: "Sign up for our Newsletter",
  okMessage: "Subscribe"
});

window.pathfora.initializeWidgets([customFormWidget]);
```

This config will generate a simple slideout with a form containing some default fields.

Legacy Form

Once you have an idea of what form elements you want to include in your widget, you may use the form builder dra
 form you wish to display. Each field can be marked as required and may have a label and name (used for as the prin
s). Text fields may also include placeholder text, and for fields with multiple options you may define the display text a

Form Builder

Once you click Save, the builder will output the formElements field that you can simply copy and paste into your wid
ucting configurations with custom forms.

Form Builder Config

JavaScript

```
var customFormWidget = window.pathfora.Form({
  // widget configuration
  formElements: [
    {
      "type": "text",
      "required": true,
      "label": "Email Address",
      "name": "email"
    },
    {
      "type": "checkbox-group",
      "required": true,
      "label": "Which feeds would you like to subscribe to?",
      "name": "subscription_feeds",
      "values": [
        {
          "label": "Beauty & Perfumes",
          "value": "beauty"
```

```
      },
      {
        "label": "Electronics",
        "value": "electronics"
      },
      {
        "label": "Fashion",
        "value": "fashion"
      }
    ]
  }
 ]
});
```
Styling Tweaks
You may style the form using custom CSS. The example in this guide applies some small CSS changes to adjust the si

Remember you can download the code for this example to get the complete JavaScript, CSS, and API override. This ca

Custom Form

Once you've tested and are happy with the look and feel of your form slideout, it's time for the most important step:
e.

Defining the Lytics Audience
The example widget in this guide will be targeted at an audience of anonymous users with a high intensity. Rememb
e widget to.

Alternatively, you may build your widget as a web personalize Experience with the Capture Leads tactic in the Lytics U

Updated 10 months ago
Content Modularization in Email with Lytics Audiences
Suggest Edits
Running a complex nurture program can be difficult to manage, especially if you're using countless static email temp
ting language to allow for dynamic user data to be embedded in an email. Dynamic templates are not only useful for
s user data such as audience membership and other user profile fields to simplify your email marketing programs al

This guide will walk through how to modularize major components of an email based on Lytics audience membershi
s applicable to most ESPs that Lytics integrates with, just be sure to refer to the your ESP's documentation for dynam

Before you begin
static email template

You should have a generic HTML email template set up in your ESP. This guide uses an email template promoting ne
of shoes the user is interested in. Think about what parts of the email you would like to change based on audience m

Build your audiences
In Lytics you'll need a target audience - the group of users to send the email to - and one or more additional audienc
e Promotional List as the target audience, and two audiences built with content affinity, Interested in Dress Shoes an
content pieces for.

content-modularization-audience-0621

Sync the audience to your email tool
Once you have your audiences ready, you will sync your target audience to an ESP. This can be done with a Lytics exp
. If you're using another ESP browse our list of integrations and the read the instructions for exporting an audience.

Select Promotional List as the target audience to sync. For Campaign Monitor the other two audiences will be record
will use in the template to determine what to show and hide for the user.

campaign monitor export

Regardless of the provider you choose you should see the Lytics users in your email tool not long after you click the S

Modify your email template
In this example the header of the email will change based on audience membership. For every element we want to p

Users in the Interested in Dress Shoes audience.
Users in the Interested in Athletic Shoes audience.
Users in the Promotional List who have not shown interest in either shoe type (generic promotion).
If a user is interested in both dress shoes and athletic shoes we can prioritize which to show based on the order of th
promote dress shoes in this example for that case.

email modularization

Follow these steps to personalize your email template in this manor:

Open your template in an HTML editor, locate the text, image or HTML element you want to change based on audien

Use the custom LyticsAudience field and conditional logic to bind your HTML content in if/else statements. Take a loo
hange the text on the banner of the example email:

HTML

```
<!-- custom headline -->
[if:LyticsAudiences=Interested in Dress Shoes]Dress shoes for any occasion
[elseif:LyticsAudiences=Interested in Athletic Shoes]Kick start your summer with new shoes
[else]Shoes of all shapes and sizes you'll love[endif]
```

Continue to edit your template to modularize the content of your email. In our example, we also switch out the imag
membership:

HTML

```
<!-- custom image -->
[if:LyticsAudiences=Interested in Dress Shoes]<img src="dress-shoes.png" alt="dress shoes" />
[elseif:LyticsAudiences=Interested in Athletic Shoes]<img src="athletic-shoes.png" alt="athletic shoes" />
[else]<img src="default-shoes.png" alt="shoes" />[endif]

...

<!-- custom CTA -->
[if:LyticsAudiences=Interested in Dress Shoes]<a href="https://shoepalace.com/products/dress-shoes">Shop Dress S
[elseif:LyticsAudiences=Interested in Athletic Shoes]<a href="https://shoepalace.com/products/athletic-shoes">Shop
[else]<a href="https://shoepalace.com/products/shoes">Shop New Shoes</a>[endif]
```

In the next step you will be able to see the rendering of the templates in each of the three contexts.

Send your campaign to the target audience
Create a new campaign in Campaign Monitor. On the Content step upload the HTML template you've created that in
review the email and toggle between the LyticsAudience dynamic content options to view each of the expected outp

campaign monitor preview

On the Recipients step be sure to select the audience you exported to Campaign Monitor from Lytics.

lytics audience in campaign monitor

Continue on to the Delivery step. You can send a test email to yourself and/or schedule your campaign for delivery.

This guide has demonstrated how you can send three distinct, personalized emails to users based on their interests
ur customers, you can send an email that speaks to a user's interests.

This is just the tip of iceberg, think of how you can personalize and modularize your email templates for more advan
es, and you can show and hide entire content sections in an email based on audience membership. Your Lytics repre
to talk through use cases reach out to the Lytics team.

Updated over 1 year ago

Customize your Web Experiences with Branded Images
Suggest Edits
A well designed Experience can really capture a user's attention, and often images are a key component to design. Ly
out of the box there is not much flexibility - that's where custom CSS can help.

In this guide, you will learn how to create a widget with a stylized image component. Images are a natively supportec
the default styles for images are rigid. This guide will explore a few different methods on how to customize images f

Custom Image Slideout

You can download the complete JavaScript configuration and CSS, for this example from the GitHub examples repos

Custom Image Approach
There are three ways you might approach adding an image to a web Experience or Pathfora widget:

Setting a background image with custom CSS.
Using the natively supported image feature with some custom CSS to adjust the size and placement of the image rel
Adding an image via inline HTML to the message or headline field.
This guide will discuss the implementation of options 2 and 3. Note that option 3 is only available for widgets built di
in the Lytics Experience editor.

JavaScript Configuration
Using the Default Image Feature
To use the native image capability in Pathfora, simply add the variant and image settings to a basic widget configurat

JavaScript

```
var imageWidget = window.pathfora.Message({
  id: "image-widget",
  layout: "slideout",
  position: "bottom-right",
  className: "image-widget",
  headline: "Save 10%",
  msg: "24 hour sale on all Apple mobile phone products!",
  image: "assets/iphone-modal.png",
  variant: "2",
  okShow: true,
  okMessage: "Save Now",
  cancelShow: false
});

window.pathfora.initializeWidgets([imageWidget]);
```
This config will generate a simple slideout, with a headline, message and CTA, and a small, circular image above the t

Custom Image No Styles

Adding an image in this way is natively supported for web Experiences in the design step of the editor.

Using an Inline Image
You could also present an image within the text content of the widget by adding an img HTML element in the headlir

JavaScript

```
var imageWidget = window.pathfora.Message({
```

```
  // widget configuration
  msg: "<img src=\"assets/iphone-mini.png\" class=\"pf-widget-img-inline\" alt=\"iPhone\">24 hour sale on all Apple m
});
```
You may want to add a custom class name to this element to help style it with CSS later.

Note: As mentioned above using HTML inline images in this manor is not compatible with web Experiences created t
works if you are implementing widgets with the SDK directly.

The complete code example in this guide will contain both a large feature image using the native Pathfora setting, ar

Images with no styles

Styling the Image Slideout
With some additional CSS work, you can style images of both types to fit the slideout.

Styling the Default Image Setting
The image generated by the image setting in the config has the class name pf-widget-img. In the CSS, to select this el
ensure that your styles will override the default Pathfora styles for images. The example below specifies the pf-widge
s name of your widget.

CSS

```
.pf-widget.pf-widget-variant-2.image-widget .pf-widget-img {
  border-radius: 0;
  width: 100%;
  height: auto;
  top: 0px;
  left: 0px;
  margin: 0px;
}
```
These styles make the image span the full width of the widget, and position it at the top.

Next you can adjust the text to appear below the image, by applying a margin to the headline. Remember that CSS s

CSS

```
.pf-widget.pf-widget-variant-2.image-widget .pf-widget-content .pf-widget-headline {
  margin-top: 190px;
}
```
Lastly, we'll need to adjust the "x" button in the corner of the modal to display prominently above the image.

CSS

```
.pf-widget.pf-widget-variant-2.image-widget .pf-widget-img {
  /* existing styles */
  z-index: 0;
}

.pf-widget.image-widget .pf-widget-close {
  color: white;
  z-index: 1;
}
```
Custom Image Styled

Styling an Inline Image
Now to style the inline image, select the custom class name you defined. The example in this guide floats the image l

CSS

```
.pf-widget.image-widget .pf-widget-img-inline {
```

```
  float: left;
  width: 25px;
  margin-right: 20px;
}

.pf-widget.image-widget .pf-widget-message {
  text-align: left;
}
```
Custom Image Slideout

Remember you can download the code for this example to get the completed JavaScript and CSS. This can act as a st

Defining the Lytics Audience
Once you've tested and are happy with the look and feel of your image slideout, it's time for the most important step
ce.

The example widget in this guide is targeted at an audience of users with a high momentum and some affinity for iP
r config with the audience ID you wish to serve the widget to.

Alternatively, as mentioned above, the image feature is natively supported by the Lytics web Experiences. You would
 of your widget.

Updated about 1 year ago
Deliver Targeted Content
Suggest Edits
Lytics makes it possible to recommend content to a user based on their affinity for certain types of content, linking t
 Lytics content affinity engine automatically scans and categorizes the content that is associated with each page on y
are then mapped against that semantic understanding of your site's content producing a user affinity score for each

You can create a Recommend Content Experience by following these steps but the keys to creating an effective reco
tion.

Build a Content Affinity Audience
You can use the Content Affinity tab of the audience builder to build an audience of users who show interest in a pa
hat audience can be used to target users with the desired Affinity in a personalized Experience.

From your Lytics dashboard select Audience.
Click Create New Audience.
Select the Content Affinity tab.
Select the Affinity you would like to target.
Any Affinity is selected by default. You can adjust the affinity score range to refine the users who will be targeted or s
In the Name your audience... field, give your audience a descriptive name.
Select Enable API Access.
In the ID field, enter an audience ID.
Click Save.
content-affinity-audience-builder-data-science
Audience with any affinity for articles about "data science"

This audience can now be used in a Recommend Content (or any other) campaign to target users who have the desi
e rules and rulesets to create highly refined audiences. You are also not limited to audiences based on content affini

Content Collections
Content collections give you the ability to group content together that you can then recommend in your campaigns.
s, recently published, author, hand picked by you, or a combination of any of these criteria. In addition, these collecti
added to or removed automatically when they match or fail to match your criteria. For more information, see Conte

targeted-content-topic-select
Content collection grouping article related to "data science" on learn.lytics.com.

Build Your Campaign

Next, you'll need to navigate to the Experiences tab and pick the "Recommend Content" tactic for Lytics. The first ste
recommend-content-select-collection

Next, select whether you want this to be based on a user's interests ("Highest Affinity"), content or product freshness
("Last Interaction"):
Screen Shot 2021-06-07 at 11.23.57 AM

Don't forget to give your Experience a name. See our Experience editor documentation for step-by-step instructions.

Updated over 1 year ago
Drive Email Capture & Engagement with Content
Suggest Edits
Content recommendations are a powerful, direct method for driving engagement of anonymous users with the goal
s to present personalized ad sets through marketing platforms like Google Ads and Facebook. You can take the pers
erve content based on each user's personal audience membership and content affinity.

Leveraging user behavior
Lytics uses data science scores to move users into preconfigured audiences based on their behavior. This use case r
tify those who are highly engaged with your content generally and, through further refining, individual content items

Building your target audience
Users can be members of preconfigured audiences determined by a combination of**characteristics .

Anonymous Deeply Engaged
For this use case we want to combine the characteristic Email Capture Status: Unknown email with the behavioral au
e will target users without email addresses, i.e. anonymous users, who are deeply engaged with your content. What
ve different ads or emails based off the content they engage with the most.

image

Using fields to refine your audience
While all the users in your Anonymous Deeply Engaged audience are engaged with your content different behaviors
ong time period while others may have consumed content over a relatively short period of time. Using the frequency
longtime anonymous, engaged users in effort to convert them to know users. Similarly, the recency score can be use
nvert them.

Activating Your Audience
Your Anonymous Deeply Engaged audience is a great target audience for site personalizations, content recommend

Delivering targeted content
To deliver the content most relevant to a user's interest you can build additional audiences based on Anonymous De
ences: Content Affinity to learn how to add content affinity rules to new and existing audiences.

Driving email capture
Your Anonymous Deeply Engaged audience is an excellent target to capture email address and convert users to a kn
documentation to learn how.

Individualized content recommendations
Lytics offers a Content API that provides recommendations based on user content affinity. Our Developer Academy a
ion provide guidance on delivering content recommendations programmatically. These documents are targeted for
some guidance.

Updated 10 months ago
Drive Mobile App Downloads With Lytics
Suggest Edits
A common marketing use case to improve mobile engagement is to create journeys that drive downloads of your br
o build audiences of anyone who has previously browsed your sites using a mobile device since the Lytics JavaScript
d Facebook, as well as other ad platforms, for driving mobile app installations.

Building the audience

From the Lytics dashboard, select Audience and then Create New Audience. Using a Custom Rule, build an audience

Screen Shot 2019-03-05 at 12.39.34 PM

This audience will include anyone who has reached your site from a mobile device.

Note: You do not need any identifying information for this audience. Be sure to select the Enable API Access checkbo
a mobile device.

Targeting the audience
Now you can build campaigns in your chosen marketing platforms to effectively target this audience of mobile web u
e using Facebook, follow these steps to target with Facebook ads. Upon completion, your advertising team or agency
ook.

Updated over 1 year ago

Engage Qualified Users with Targeted Ads
Suggest Edits
Using Lytics audiences you can identify anonymous traffic with higher potential to engage and/or convert. A powerfu
Google Ads, driving them to further interact with your brand.

Leveraging user data
This use case will provide a few suggested audience definitions to support your retargeting effort. These audiences w

Lytics preconfigured audiences such as characteristics and behavioral audiences.
Commerce user fields such as Lifetime Value (LTV) or Lead Status.
Lytics data science scores such as frequency, recency, and intensity.
Note: The Lytics StartSmart data schema supports a standard set of commerce fields including the two used in this u
y also be mapped to your account, for example if you've imported data from Salesforce you should have access to th

Building your target audiences
Using the building blocks mentioned above you can build one or more of these suggested audience to use in ad cam

Anonymous Deeply Engaged
This audience combines the characteristic Email Capture Status: Unknown email with the behavioral audience Lytics
tic uses the intensity score, and is a great way to qualify anonymous traffic for targeting.

anonymous-deeply-engaged

Known High LTV
Combine the Email Capture Status: Known email with the User's Lifetime Value field using the "AND" rule to create a
be a great source audience to generate a lookalike audience.

known-high-ltv

Known Leads
For B2B marketing you can substitute LTV with a field like Lead Status to build an audience of open leads for retarge

known-leads

Refining your audiences with user fields
Want to further narrow your audience to only the most qualified users? Try experimenting with additional rules usin
cency score to target users who recently interacted with your brand. These qualifiers can help you create a further re

Activating your audience
Once you've built your audience(s) you can export them to your ads platform for use using Lytics' build in integration

Retargeting anonymous users
Anonymous users can be advertised to directly in Facebook. You can access the Anonymous Deeply Engaged you bu
also target anonymous users in Google platforms such as Adwords through our JavaScript integration with Google A

Reach new, qualified users with Lookalike audiences
Known users can be targeted across both Facebook and Google, as well as drive lookalike audiences. You can export
udiences and Google Adwords remarketing lists.

To power lookalike audiences which will find users similar to your best customers, read more on creating a lookalike

Updated over 1 year ago
Enhance Personalized Messaging with User Profile Fields
Suggest Edits
Targeting Lytics audiences with web Experiences allows you to achieve a level of personalized messaging to a group
u can further personalize your Experiences at a one-to-one level by including specific user profile fields in the messa

In this guide, you will create a bar widget containing a coupon code unique to the user using entity field templates. T
it in the widget.

Bar with Coupon Code

This technique can be used to include any user field inline within a widget in the headline, message, or CTA link of ar
y their first and/or last name if the data is available in Lytics.

You can download the complete JavaScript configuration and API override command for this example from the Githu
d by web personalize Experiences in the Lytics UI.

Javascript Configuration
Begin with a generic widget configuration containing a static coupon code in the message field.

JavaScript

```
var entityTemplateWidget = window.pathfora.Message({
  id: "entity-template-widget",
  layout: "bar",
  position: "bottom-fixed",
  className: "entity-template-widget",
  msg: "Use code <strong>FREE2019</strong> for free shipping on your next purchase!",
  okMessage: "Get Free Shipping!",
  cancelShow: false
});

window.pathfora.initializeWidgets([entityTemplateWidget]);
```

This config will generate a bar widget with a CTA. You can use the confirmAction callback to redirect the user to a che
ameter.

JavaScript

```
var entityTemplateWidget = window.pathfora.Message({
  // widget configuration
  confirmAction: {
    callback: function () {
      window.location.href = "https://yourwebsite.com/checkout?code=FREE2019";
    }
  }
});
```

Coupon Applied

To customize this coupon code per user, you can access a field by the field name (in this example, offer_code) from t

Fields that you wish to use in the template of your widget must be surfaced first.

JavaScript

```
var entityTemplateWidget = window.pathfora.Message({
  id: "entity-template-widget",
  layout: "bar",
  position: "bottom-fixed",
  className: "entity-template-widget",
  msg: "Use code <strong>{{offer_code}}</strong> for free shipping on your next purchase!",
  okMessage: "Get Free Shipping!",
  cancelShow: false,
  confirmAction: {
    callback: function () {
      window.location.href = "https://yourwebsite.com/checkout?code={{offer_code}}";
    }
  }
});

window.pathfora.initializeWidgets([entityTemplateWidget]);
```

Bar with Coupon Code

You may use this bracket notation in the Choose URL step of the Experience editor. So there is no need to make API

You may be wondering, what happens when the current user does not have the field offer_code on their profile? The

Simply ensure that the targeting audience requires that the field in question exist.

You can define a fallback value. This is a default static value to be shown if offer_code does not exist on the user pro

Alternately, you may set the display condition showOnMissingFields via the JavaScript configuration if you are using t

Testing the Personalized Widget

Testing widgets that contain user profile fields can be tricky. If you are using the Pathfora SDK, it may help to use the during the development process.

JavaScript

```
window.pathfora.customData = {
  "offer_code": "FREE2984712312"
};
```

Alternatively, add the offer_code field to your current profile by sending an API request to the data stream which con r (usually _uid).

You can use the jstag.getid() function in the developer console of your website which has the Lytics JStag loaded to g

Here is an example API call to add the offer_code field via the default stream.

Shell

```
curl -XGET http://c.lytics.io/c/{lytics_account_id}/default?offer_code=FREE324234234&_uid=={uid_here}
```

This example makes a request to the Lytics collector API for your account. If offer_code is mapped in the LQL for the it should add the value FREE324234234 to the user profile. Once you see it show up in your user profile in the Lytics d with the new field value.

Enity Field

Define the Lytics Audience

The example widget in this guide will be targeted at an audience of high LTV customers who have the user profile fie D you wish to serve the widget to if you are using the Pathfora SDK.

Updated over 1 year ago

Grow Your Email Marketing List

Suggest Edits
Email newsletters are a valuable tool to share content, product features, or announcements with your customers. Re
ed and valuable customers your brand has. A Lytics personalize collect lead campaign can assist in growing your em
engage.

Create an Audience of High Activity Users
Effective campaigns begin with an effective audience. The goal here is to collect email addresses of visitors to your si
wing audience combines multiple rules to target users with a quantity score of at least one whose email is not know
ity on your site and are not great candidates for engagement with an email mailing list. You also don't want to prese
are not limited to this criteria. You can target any audience who you think would be valuable to engage with via ema

grow-email-audience

Create Collect Lead Campaign
Once you have an audience of users you would like to target use it when building your collect lead campaign. The ke
ed to your users. You may only want to solict email addresses from a particular section of your site and only display
on your site.

grow-email-display-options

Export Leads to Email Service Provider
Once your new campaign collects email addresses you can use your campaign to build a new audience. A user who e
e exported to to your ESP and added to your email list. The specific export instructions for your ESP will vary, see ou

grow-email-audience-converted

Updated over 1 year ago

Import an Audience from your Data Warehouse
Suggest Edits
In general, audiences should be created in Lytics using the audiences builder, then pushed to actioning platforms via
can be automated to keep downstream tools in sync.

However, in some cases, there are more narrow and targeted audiences of users who you need to target for one-off
d creating the audience in your data warehouse then pushing that group of users to Lytics.

Examples of audiences to build in Lytics:

Users who have visited the site in the last week
Users who purchased a product within the last three days
Users who opened an email and have not logged in yet
Examples of one-off audiences to push from an external querying tool:

Users who attended event A and purchased a product over $100 two quarters ago
Users who visited a booth during conference A and, on average, ordered at least three products per month over the
Users who should receive a promotional offer based on a list provided by an outside agency
Pushing a one-off audience to Lytics
In this example, we'll use Google BigQuery as our data warehouse and querying tool.

Once notifying your account manager, your Lytics instance will be configured to pull data from a table called lytics_cu

customer_id (string)
custom_audience_name (string)
custom_audience_value (string)
Instructions
Create a table called lytics_custom_audience_push with the above schema.
Write your query. The query output must have three columns: the audience name, the audience value, and the custo
Under query settings, set lytics_custom_audience_push as the destination table for your query results.
Lytics pulls data from lytics_custom_audience_push on a rolling basis, so you should see the custom_audiences field
Example

Let’s say you need to push an audience of VIP users selected for targeting based on their purchase history and atten

SQL

```
SELECT user_id,
      "vip_users" AS custom_audience_name,
      "true"      AS custom_audience_value
FROM   user_db u
      JOIN event_db e
        ON e.id = u.event_id
WHERE  u.purchase_avg > 50
      AND u.purchase_num > 5
      AND e.id IN ( 748, 573, 934 )
```
Your lytics_custom_audience_push table should look something like this:
Screen Shot 2019-05-06 at 4.19.00 PM

After this query is pushed to the lytics_custom_audience_push table, you can use it in the Lytics audience builder und
Screen Shot 2019-05-06 at 3.57.38 PM

Notes
The lytics_custom_audience_push table is configured to accept strings as values. If you need to push a different data
and mappings for integers, floats, and timestamps.
One-off audience pushes are typically used for one downstream campaign. If you find yourself repeatedly targeting a
t audience reconfigured as a user attribute.
If you are using a different data warehouse, you can send the table as a CSV to an SFTP server or S3 bucket for Lytics
Updated over 1 year ago

Improve Ad Campaign Metrics with Predictive Targeting
Suggest Edits
Lytics predictive audiences can be leveraged in advertising tools to make intelligent targeting and bid strategy decisi
diences in your ad tools as seed audiences for lookalike modeling, this use case specifically uses Lytics data science s
ng efforts around users most likely to complete an action instead of anyone who may be eligible for a remarketing e

Build a Predictive Audience in Lytics
Leverage Content Affinity in Audiences
Custom Predictive Audiences
Build a Predictive Audience in Lytics
There are several ways to build your audience in Lytics that you can utilize in your ad platform for targeting. To begin
ng the deterministic rule for who you’d like to retarget in your ad strategy. This most commonly looks like:

“Has done event X but not Y.”
“Has web activity but is not a paying subscriber.”
It’s likely that you have rules like this already set up in your ad tools. To improve the performance metrics of these ca
 size available for targeting but increase the likelihood of conversion against your business goal. This will impact your
e impressions but increasing conversion rate and/or decreasing cost per acquisition.

To do this, layer in one of the Lytics out-of-the-box behavioral audiences that use data science, such as Engagement:

build predictive audience
*This rule set includes all deeply engaged users who haven’t made a purchase.

By passing this audience directly into an ad channel, your remarketing efforts will be more refined to only include us
 total user base.

Leverage Content Affinity in Audiences
Lytics can also create data-science based audiences specific to a topic of interest for an individual user. This logic is m
hat they have shown past interest in because it evaluates changes in topics in real-time and assesses a user’s interes
unt and their actions. Read more about user-level topic affinities here.

You can utilize a content-affinity audience for remarketing as a single rule for an audience, or as part of a rule set as

content affinity audience
This rule set includes users with a high affinity for ‘Chicken’ and who have their membership on pause.

By using content affinity-based audiences for remarketing in ad channels, your ad copy and creative can be strategic
hey have previously shown an interest in.

Custom Predictive Audiences
The last strategy for predictive audiences within Lytics is to rely on our proprietary SegmentML product to do lookali
are familiar with lookalike modeling within ad channels to extend your reach. You can also mine your own first-party
vices to within an ad channel.

Your Lytics Account Manager or Services team can help you create predictive audiences within your account, which c
her audience built within Lytics. See the Integrations documentation for provider-specific information.

segml audience

This summary report shows the growth of a custom predictive audience over a week.

While these audiences may be smaller than the lookalikes you’ll get back from Facebook or Google Ads directly, beca
e showing signals towards behaving like your seed audience, they will have a higher conversion rate that can be influ
saging.

Updated over 1 year ago
Increase Conversions with Lytics and Facebook Lookalike
Suggest Edits
With Lytics audiences and Facebook lookalike you can increase conversions by targeting new prospects that have sir
cover how you can create a source audience of your top lifetime purchasers in Lytics and use it in a Facebook lookali
o are likely to become purchasers.

Build an Audience of High Value Purchasers in Lytics
For purchase data, this example uses an account that has been connected with Shopify data via Lytics' Shopify impor
r method such as the Javascript Tag, CSV, or one of our other commerce integrations. When building your audience t

Follow the steps outlined in this guide to build source audiences in Lytics. The steps that follow in this guide provide
s audience.

In the audience builder, select Custom Rule.
If you have imported data via Shopify, search for and select the field Lifetime Order Price. This field contains the sum
lifetime order price

From the rule options Lifetime Order Pice must... select be at least. In the These values textbox enter a price thresho
audience builder high value purchasers

Click Add Condition.
Verify the user count of your audience. Facebook expects the source audience to be anywhere from 1,000 to 50,000
rules to generate an audience of the appropriate size and specificity.
NOTE: If you're unable to generate an audience of appropriate size with the Lifetime Order Price field, consider creat
ecific products instead.

Click Create to save your audience.
Using your Lytics Audience in a Lookalike Ad Campaign
Follow through with the steps below to use your high value purchasers audience for the source of a Facebook lookal

Export to Facebook
Create a Facebook Lookalike Audience
Assign your Lookalike Audience to an Ad
high value ad

Updated over 1 year ago

});

Keep Visitors Engaged with Content Recommendation Experiences
Suggest Edits
Lytics content recommendations are a powerful tool for personalization. They enable you to engage your visitors wit
ersonalize Experiences support content recommendations natively, but with API overrides or the Pathfora SDK, you
idget.

In this guide, you will build a recommendation modal to reel users back in when they are thinking about leaving your
CSS and additional display fields such as the name of the author and the publication date.

Content Recommendation Modal

You can download the complete JavaScript configuration, CSS, and API override command for this example from the

JavaScript Configuration
Start with a basic message modal configuration. The goal of this Experience is to entice users to stay on your website
to only show the modal when the user is about to leave the page.

JavaScript

```
  var contentRecWidget = window.pathfora.Message({
    id: "content-rec-widget",
    layout: "modal",
    className: "content-rec-widget",
    headline: "Wait! Before you go...",
    msg: "... We think you may like this. Maybe check it out before you leave.",
    okShow: false,
    cancelShow: false,
    displayConditions: {
      showOnExitIntent: true
    }
  });

  window.pathfora.initializeWidgets([contentRecWidget]);
```

Modal with no Recommendations

Before you proceed, you will need to create a content collection. See the documentation on content collections to lea
ent collections for recommendations for instructions on how to get the ID of the collection, which you will need in th
that have been published within the last year.

Now to set up the recommendations in the config. Add the recommend and variant settings to your config. Then add
ensures that Lytics recommendations only return content that the user has not already visited.

JavaScript

```
  var contentRecWidget = window.pathfora.Message({
    // widget configuration
    variant: 3,
    recommend: {
      visited: false,
      collection: "{your_collection_id}"
    }
  });
```

Basic Recommendation Modal

Now you will have a basic modal with content recommendations displaying on exit intent. Since the example display
was published and the author name. To do so, you can add the display object to your configuration.

JavaScript

```
var contentRecWidget = window.pathfora.Message({
  // widget configuration
  variant: 3,
  recommend: {
    visited: false,
    collection: "{your_collection_id}",
    display: {
      date: true,
      author: true
    }
  }
});
```

You can even add some additional settings to style the date, and extend the amount of text shown in the article desc

JavaScript

```
var contentRecWidget = window.pathfora.Message({
  // widget configuration
  variant: 3,
  recommend: {
    visited: false,
    collection: "{your_collection_id}",
    display: {
      date: true,
      author: true,
      dateOptions: {
        weekday: "long",
        year: "numeric",
        month: "long",
        day: "numeric"
      },
      descriptionLimit: 220
    }
  }
});
```

Unstyled Content Recommendation

Check out the Pathfora content recommendations documentation to see the full list of settings you can apply to cust

Styling the Recommendation Modal

In this example, we will make some small adjustments to soften the look of the content recommendations. You can c

Content Recommendation Modal

When writing your own custom styles, remember that different users will see a different pieces of content based on
mage in relation to the text. Images from different articles may be of a different size, and text descriptions may vary

Be sure to test your modal with multiple different content items. You can do this by adding the shuffle setting to you
modal. You may also want to ensure that all content in your collection has similar image sizes if you do want to adjus

Content Recommendation Modal Alternate Content

Define the Lytics Audience

The example widget in this guide will be targeted at users in the Likely to Reengage characteristic. Remember to upd
et to.

Alternatively, you may build your widget as a web personalize Experience in the Lytics UI with the Recommend Conte
ide. See the Github Repository for the exact override command.

Updated over 1 year ago

Leverage Lookalike Models and Predictive Audiences
Suggest Edits
When you need to reach new users that look like your best customers, create Predictive Audiences powered by Lytic
customer engagement, drive higher conversion rates, and reduce ad spend.

lytics-lookalike-models

Using Predictive Audiences can benefit marketers in a number of ways:

Helps you define better targeting criteria based on behavioral data rather than demographics or third-party data.
Enables you to optimize each audience for reach or accuracy based on campaign goals.
Deliver use cases that drive conversions across the customer lifecycle.
Better targeting criteria
Predictive Audiences simplify your targeting strategies by eliminating the need to manually define parameters to sor
the question, "how do I know what to target users on?" Each Lookalike Model in Lytics has a Feature Importance cha
rsions for your source and target audiences. These attributes include Lytics behavioral scores, content affinities, and

model-feature-importance-learn-use-case

In the example above, Lytics created a Lookalike Model to understand which of our documentation site users are mo
. As you can see in the chart, our model determined that "Total Pageview Count", "Quantity", and an affinity for "mar
ecome deeply engaged. Your Lookalike Models may simply confirm assumptions, but in others cases, they can offer
ally influence desired actions.

Optimize based on goals
Once a Lookalike Model is built, you can easily create different Predictive Audiences to optimize the balance betweer
campaign. When reach is a priority, you can build Predictive Audiences with higher reach but lower accuracy to targ
can build Predictive Audiences with higher accuracy but lower reach to target only the users mostly likely to convert.

high-accuracy-low-reach-summary

For example, if you're targeting single purchasers to encourage them to become repeat purchasers, accuracy may b
de-off between accuracy vs. reach.

Use cases across the customer lifecycle
Predictive Audiences help you engage and convert customers across their lifecycle, from anonymous users visiting y
ers that are brand advocates. Below are common examples of how to build Lookalike Models that power Predictive

Earlier stages:

Which of my anonymous users are most likely to convert to known users?
Which of my users with free trials are most likely to convert to subscribers?
Mid stages:

Which of my single purchasers are most likely to become multi-purchasers?
Which of my highly engaged users are most likely to become subscribers?
Later stages:

Which of my subscribers are most likely to churn?
Which of my engaged users are likely to make a purchase soon and do not require additional marketing?
Updated over 1 year ago

Lookalike Models: Conserve marketing spend on engaged users
Suggest Edits
Determining which users to exclude from a campaign is equally as important as finding the users you want to target
purchase soon, you can reduce marketing spend by suppressing those users from your campaign audiences.

Define Source and Target Audiences

The first step to building a Lookalike Model is selecting your source and target audiences. Start by defining the desir
s with a pending order.

The source audience is the group that you want to find similar users from, focusing on those who've shown signals t
uilt audience lytics_deeply_engaged or build your own audience based on your criteria for engagement.

Build Lookalike Model
In the Lytics UI, navigate to the Laboratory section and click Create New Model at the top right. On the configuration
reviously defined.
lookalike-model-configuration-engaged-users-pending-order

By default, the Auto Tune option is turned off. If you're not getting enough performance out of your models, try Auto
Model Training Only if you're in an exploratory phase and not ready to target users based on this model's prediction
r documentation.

Depending on the sizes of your source and target audiences, your Lookalike Model may take a few minutes up to a f
status until the model is complete.

Create Predictive Audience
Once your model is built, view the Model Summary to determine if it's ready for use in your targeting. You must Acti
ch will evaluate users and write the model's prediction scores to user profiles. This process can take up to three days

lookalike-model-summary-engaged-users-pending-order

On the summary page, click Create Predictive Audience in the Model Usage section, which will open the audience bu
decision threshold of 0.5 is used, but you can adjust the decision threshold as needed to reach more users or be mo
urchaser without additional marketing.

lookalike-deeply-engaged-pending-order

Next Steps
After creating an audience of users likely to make a purchase soon, you may want to add these users to a suppressio

Updated over 1 year ago
Lookalike Models: Convert anonymous users to known users
Suggest Edits
Converting unknown users to known users is a key starting point for many marketing campaigns. Collecting data fro
rand or website. Building a Predictive Audience can help you intelligently target anonymous users who are most like

Define Source and Target Audiences
The first step to building a Lookalike Model is selecting your source and target audiences. As a marketer, this starts b
in this case, "known users". You can create this target audience in Lytics for users with identifying field(s) such as ha

The source audience is the group that you want to find similar users from, focusing on those who've shown signals t
s "anonymous users," which you can define as users who are missing an identifying field such as email, contact_id, cu

Build Lookalike Model
In the Lytics UI, head to the Laboratory section and click Create New Model at the top right. On the configuration pag
ously defined.
lookalike-model-configuration-anonymous-known

By default, the Auto Tune option is turned off. If you're not getting enough performance out of your models, try Auto
Model Training Only if you're in an exploratory phase and not ready to target users based on this model's prediction
r documentation.

Depending on the sizes of your source and target audiences, your Lookalike Model may take a few minutes up to a f
status until the model is complete.

Create Predictive Audience
Once your model is built, view the Model Summary to determine if it's ready for use in your campaign. You must Act

h will evaluate users and write the model's prediction scores to user profiles. This process can take up to three days

lookalike-model-summary-anonymous-known

On the summary page, click Create Predictive Audience in the Model Usage section, which will open the audience bu
decision threshold of 0.5 is used, but you can adjust the decision threshold as needed to reach more users or be mo

lookalike-anonymous-to-known-predictive-audience

Next Steps
After creating a Predictive Audience from anonymous users most likely to convert to known users, you may want to
convert them to customers. Learn more about how to acquire new customers using Lytics.

Updated over 1 year ago

Lookalike Models: Convert single purchasers to multi-purchasers
Suggest Edits
Once you've acquired customers, a good way to increase sales and revenue without increasing advertising cost signi
a second or third purchase. Reaching out to these customers with the appropriate messaging can be the first step in

Define Source and Target Audiences
Begin building a Lookalike Model by selecting your source and target audiences. The desired outcome for the target
ill be "single purchasers" who have shown that they are likely to convert and become repeat purchasers.

Build Lookalike Model
In the Lytics UI, go to the Laboratory section and click Create New Model at the top right. On the configuration page,
sly defined.
lookalike-model-configuration-single-multi-purchasers

By default, the Auto Tune option is turned off. If you're not getting enough performance out of your models, try Auto
Model Training Only if you're in an exploratory phase and not ready to target users based on this model's prediction
r documentation.

Depending on the sizes of your source and target audiences, your Lookalike Model may take a few minutes up to a f
status until the model is complete.

Create Predictive Audience
Once your model is built, view the Model Summary to determine if it's ready for use in your campaign. You must Act
h will evaluate users and write the model's prediction scores to user profiles. This process can take up to three days

lookalike-model-summary-single-multi-purchasers.png

On the summary page, click Create Predictive Audience in the Model Usage section, which will open the audience bu
decision threshold of 0.5 is used, but you can adjust the decision threshold as needed to reach more users or be mo
tional purchases.

lookalike-single-to-multi-purchaser

Next Steps
After creating a Predictive Audience of single purchasers most likely to become multi-purchasers, you may want to ta
ams, or emails to drive sales.

Updated over 1 year ago

Lookalike Models: Determine which subscribers are likely to churn
Suggest Edits
Retaining customers is more important now than ever, and for businesses that have a subscription model, reaching
retention and customer engagement.

Define Source and Target Audiences

The first step to building a Lookalike Model is selecting your source and target audiences. The target audience in this
n define this based on the users' last engagement time or some some other measure of engagement. The source au
scription field(s) from your imported data.

Build Lookalike Model
In the Lytics UI, head to the Laboratory section and click Create New Model at the top right. On the configuration pag
ously defined.
lookalike-model-configuration-subscribers-churn-risk

By default, the Auto Tune option is turned off. If you're not getting enough performance out of your models, try Auto
Model Training Only if you're in an exploratory phase and not ready to target users based on this model's prediction
r documentation.

Depending on the sizes of your source and target audiences, your Lookalike Model may take a few minutes up to a f
status until the model is complete.

Create Predictive Audience
Once your model is built, view the Model Summary to determine if it's ready for use in your targeting. You must Acti
ch will evaluate users and write the model's prediction scores to user profiles. This process can take up to three days
lookalike-model-summary-subscribers-churn-risk

On the summary page, click Create Predictive Audience in the Model Usage section, which will open the audience bu
decision threshold of 0.5 is used, but you can adjust the decision threshold as needed to reach more users or be mo

lookalike-subscriber-churn

Next Steps
After creating a Predictive Audience, you may want to target this audience with emails to help them re-engage with y
ing customers.

Updated over 1 year ago

Mobile Messaging with Lytics Webhooks and Serverless Functions
Suggest Edits
Lytics webhooks paired with serverless functions are a great way to build custom workflows to power your marketin
a trigger for a variety of platforms to send emails, push notifications, and alerts. This example uses a serverless clou
hen they become highly engaged via Twilio.

Setup the audience
In this example, you're going to send a personalized text message to a user when they become highly engaged deter
nd messages to non-subscribed users who have a phone number. Therefore, you are going to need to create an auc
engaged based on Lytics data-science scores. Second, their profile has a phone number. And third, they are not yet

In the audience builder, you're going to use an existing audience for highly engaged users and two custom rules for s
lding audiences, check out the audience builder docs.

NOTE: Twilio's API requires phone numbers with a country code (e.g. +11234567890). If phone numbers are not stor
be used to correctly format the number.

Screen Shot 2019-01-16 at 1 26 28 PM

Create the cloud function
This example uses Google Cloud Functions to power this custom workflow, however this will work just as well with ot
ckstart on Google Cloud Functions see Quickstart: Using the gcloud Command-Line Tool.

The Lytics webhook sends the full profile of a user when they enter or exit the audience. The code below receives th
send a custom text message to the user.

Note: You'll also need a Twilio account. When using a Twilio free trial, you can only send text messages to the numbe

```
// Twilio Client
const accountSid = process.env.ACCOUNT_SID;
const authToken = process.env.AUTH_TOKEN;
const client = require('twilio')(accountSid, authToken);

exports.sms = (req, res) => {
 const r = req.body;

 // Do not send a text message when the user exits the audience
 if (r.data.segment_events[0].event === "exit") {
  res.status(200).end();
  return;
 }

 const from = 'your twilio number';
 const to = r.data.phone_number;
 const body = `Hey ${r.data.first_name || 'there'}, we thought you might be interested in subscribing. As an added b
uid=${r.data._uid}`

 // Send the message
 client.messages
  .create({ from, to, body })
  .then(message => console.log(message.sid))
  .then(res.status(200).end('success'))
  .catch(err => res.status(500).end(`error: ${err}`));
}
```

Next, deploy the function. You can get your account_sid and auth_token from the Twilio dashboard.

```
gcloud functions deploy sms --set-env-vars ACCOUNT_SID=<your_account_sid>,AUTH_TOKEN=<your_auth_token> --r
```

After deploying the cloud function, you will be provided with an endpoint that triggers the function. You can also finc

Screen Shot 2019-01-16 at 1 28 48 PM

Create the Webhook
Next, you need to export the audience previously created. Return to Lytics and navigate to Data > Integrations and s
bhook, select the audience created previously moving it to the right column, enter the url trigger for your cloud func
ould received a message that your webhook was successfully created. When a user enters or exits the selected audie
L, triggering the cloud function.

Screen Shot 2019-01-16 at 1 30 32 PM

That's it! You've successfully created a webhook trigger that will automatically send a text message to unsubscribed u

Updated over 1 year ago
Optimize Remarketing Spend
Suggest Edits
Remarketing is considered to be one of the most efficient channels available for return on ad spend. If done correctl
st advertisers remarket wastefully. If your remarketing partners were more efficient you'd have more dollars to purs

Lytics can quantify recency, depth of visit, likelihood to return, likelihood to transact, and other metrics based on pre
factors such as categories browsed, content affinities, and whether or not someone is a subscriber or customer. Usi
r investment in Lytics within days or weeks.

Build an Effective Remarketing Audience
Remarketing to users most likely to transact starts by building an audience that includes the users who show the gre
rtisers have had success measuring engagement with a semi-arbitrary metrics such as 3 or more pageviews but Lytic
cs data science scores, in this case quantity. Similarly, using Lytics recency score has been more effective than a fixec

Using the Lytics audience builder, you can build an audience based on two custom rules. The goal is to produce an a
add a custom rule based on score_quantity, setting the value that includes the top ~15% of your total audience. Sec
at leaves ~10% of your total audience. You should play with these numbers to find the audience that makes the mos
udience of users who are more deeply engaged while a higher recency score will target users who have been active

remarketing-audience

Finally, if you're really looking to get the extra mile, you can avoid spending on remarketing to users that you can alr
oving users for whom you have an email address. To filter users with known email addresses, add a existing audienc
c and toggle Excluded.

remarketing-audience-filtered

Export Remarketing Audience to Ad Networks
Your remarketing audience can be exported to Facebook, Google Ads, or other ad networks for use in your advertisi

Updated over 1 year ago

Personalize the Messaging of your Website Based on Audience
Suggest Edits
Lytics web Experiences are a great way to quickly spin up a modal or slideout on your website with personalized mes
ep further by tailoring inline elements on your web page towards different Lytics audiences using the Pathfora SDK.

In this guide, you will learn how to implement inline content modularization which will show and hide different piece
ip. This example will provide content for following audiences: high momentum users, first time visitors, and users wh

Inline Content Modularization diagram

You can download the complete HTML code for this example from the Github examples repository. This example co
n example JavaScript configuration is included should you wish to try the alternate implementation.
However, this guide will focus on the HTML solution, as it is often the preferred method given that the development
and there is no pre-defined structure of the content that may be displayed.

Defining your Audiences and Content
In this example you will use three audiences to determine what content should be shown in a section to the right of
as you can imagine this technique could be applied to multiple, major parts of your website to completely customiz

Before your team does any design or copy writing it may help to determine which key Lytics audiences you would lik
may want to think about how your website should communicate and look to each of these personas and then build
less of the scale of your project, the audiences should inform the messaging.

Audiences used for inline content modularization must be API Enabled and have an API ID. You will need to know th

Once you have finalized the audience definitions, designs, and copy for your inline personalized modules, simply sta
d CSS on your website. Start with the content to be displayed to a single audience. This is the HTML example of cont

HTML

```
<div class="feature-block">
  <div class="block-head">
    Thanks <span>for visiting</span>
  </div>
  <div class="block-inner">
    <img class="feature-image" src="assets/iphone.png" alt="iPhone">
    <p>Check out our new products. We provide the highest quality in everything from the newest smart phones to yo
    <a class="btn" href="shop.html">Shop Now</a>
  </div>
</div>
```

First Visit Block

Go ahead and build out all the code for each of your audiences. It may help to comment out the options that will be
what an end user in each audience will see instead of viewing all personalized content options at once.

Implementing Content Modularization
When all of your content is good to go it's time to apply the audiences. Consider the following definitions:

A block is a unit of content to be displayed to a single audience within a group.
A group may be made up of one or many content blocks, each with unique audiences. The end user will only be able
p might need to be formatted similarly as they will take up the same space on the page.
In the example code, there is a single group which will control the content displayed to the right of the hero, and fou
h block to be displayed to users who are not a member of any of the audiences associated with the other blocks in t
ibutes:

data-pftrigger - The ID of the audience you wish to display the block to. Each unique value for this attribute defines t
data-pfgroup - A string name unique to the group which differentiates it from other personalization groups defined
ty between its content blocks such as placement on the page.
Remember to check out the Pathfora documentation for more information on these attributes and additional code e
ization example code looks like:

HTML

```
<!-- High Momentum block-->
<div class="feature-block" data-pfgroup="right_hero_feature" data-pftrigger="high_momentum">
  <div class="block-head">
    Get new coupons <span>every month</span>
  </div>
  <div class="block-inner">
    <img class="feature-image" src="assets/money.png" alt="Save Money">
    <p>Want to get monthly coupons for up to 30% off your order every month? Sign up below to subscribe to our cou
    <a class="btn" href="signup.html">Sign Up</a>
  </div>
</div>

<!--First Time Visitors block-->
<div class="feature-block" data-pfgroup="right_hero_feature" data-pftrigger="first_time_visitor">
  <div class="block-head">
    Thanks <span>for visiting</span>
  </div>
  <div class="block-inner">
    <img class="feature-image" src="assets/iphone.png" alt="iPhone">
    <p>Check out our new products. We provide the highest quality in everything from the newest smart phones to yo
    <a class="btn" href="shop.html">Shop Now</a>
  </div>
</div>

<!--Cart Abandoners block-->
<div class="feature-block" data-pfgroup="right_hero_feature" data-pftrigger="cart_abandoners">
  <div class="block-head">
    Get your order with <span>free shipping</span>
  </div>
  <div class="block-inner">
    <img class="feature-image" src="assets/basket.png" alt="Shopping Basket">
    <p>Looks like you were interested in purchasing a product on our site recently. We'd like to offer you free shipping
    <a class="btn" href="checkout.html">Apply Discount</a>
  </div>
</div>

<!--Default block-->
```

```
<div data-pfgroup="right_hero_feature" data-pftrigger="default">
  <!-- Default content here-->
</div>
```

Ordering of blocks does matter. For example, you may be wondering what would a user who has a high momentum
bove? Pathfora will select the first item in the group that is applicable to the current user based on audience membe
um users. If you wanted it to be possible for the user to see both content blocks at once you would need to define th

High Momentum block

Additional Notes
You may notice some flickering of elements when the page loads. This can happen if Pathfora library and is loaded a
e following line of CSS to your website:

CSS

```
[data-pftrigger], [data-pfrecommend]{ display: none; }
```

This ensures that all blocks are hidden upon page load, and once Pathfora has loaded it will set the proper display se

Updated over 1 year ago
Populate Your Website With One-to-One Content Recommendations
Suggest Edits
Content recommendations are a powerful tool to keep visitors engaged on your website. You can build an even deep
directly onto your site.

In this guide, you will learn to implement inline content recommendations using the Pathfora SDK.

Inline Content Recommendation

You can download the complete HTML code for this example from the Github examples repository.

Build a Content Collection
Before you proceed, you will need to create a content collection. See the documentation on content collections to lea
tent collections for recommendations for instructions on how to get the ID of the collection, which you will need in th
ages, so that the recommendation algorithm can recommend products to users based on their interests.

Constructing The Recommendations
Start by thinking about how you want your content recommendations to look on the page. Check the Pathfora docur
presentation of your content. This example will include an image, title, description and a link to the product page.

Inline Recommendation Block

Next determine how many recommendations you want to show on the page. Similar to content modularization, Path
different context:

A block is a single unit of content (a single article, product, etc).
A group defines one or multiple blocks of content recommendations that pull recommendations from the same Lytic
ore than once in a group.
This example has four blocks in the group. These concepts map to the follow data- HTML attributes:

data-pfblock - A unique string name for a single recommendation block.
data-pfrecommend - The ID of the content collection. Blocks with the same data-pfrecommend value are considered
There is an additional attribute data-pftype which is applied to multiple elements within the block. This identifies wha
See the documentation for in in-depth breakdown of what fields are available and how they should be named.

Now consider this HTML example for a single recommendation block:

HTML

```
<li class="product" data-pfblock="product_rec_1" data-pfrecommend="{collection_id}">
```

```
  <img data-pftype="image" alt="product recommendation">
  <h4 data-pftype="title"></h4>
  <p data-pftype="description"></p>
  <a class="button" data-pftype="url">Buy<span class="icon"></span></a>
</li>
```

These appear to be empty elements, however once Pathfora makes the call to the Lytics content recommendation A
for the img, the href value for the a element, and the inner text of the title and description elements.

That's really all there is to it. You can repeat this code to include multiple blocks for multiple recommendations, and

HTML

```
<!-- Recommendations -->
<div class="recommendation-block">
  <div class="block-head">
    <img src="assets/offers-icon.png" alt="store icon">
    Recommended <span>just for you</span>
  </div>

  <ul class="block-inner">
    <!-- Product 1 -->
    <li class="product" data-pfblock="product_rec_1" data-pfrecommend="{collection_id}">
      <img data-pftype="image" alt="product recommendation">
      <h4 data-pftype="title"></h4>
      <p data-pftype="description"></p>
      <a class="button" data-pftype="url">Buy<span class="icon"></span></a>
    </li>

    <!-- Product 2 -->
    <li class="product" data-pfblock="product_rec_2" data-pfrecommend="{collection_id}">
      <img data-pftype="image" alt="product recommendation">
      <h4 data-pftype="title"></h4>
      <p data-pftype="description"></p>
      <a class="button" data-pftype="url">Buy<span class="icon"></span></a>
    </li>

    <!-- Product 3 -->
    <li class="product" data-pfblock="product_rec_3" data-pfrecommend="{collection_id}">
      <img data-pftype="image" alt="product recommendation">
      <h4 data-pftype="title"></h4>
      <p data-pftype="description"></p>
      <a class="button" data-pftype="url">Buy<span class="icon"></span></a>
    </li>

    <!-- Product 4 -->
    <li class="product" data-pfblock="product_rec_4" data-pfrecommend="{collection_id}">
      <img data-pftype="image" alt="product recommendation">
      <h4 data-pftype="title"></h4>
      <p data-pftype="description"></p>
      <a class="button" data-pftype="url">Buy<span class="icon"></span></a>
    </li>
  </ul>
</div>
```

Inline Content Recommendation

Remember that the recommendation API will return different content for different users based on their affinities in L
th different pieces of content in your collection to ensure that it will work for content with or without an image, desc
our content collection accordingly.

Additional Notes

As mentioned in the content modularlization guide, you may notice some flickering of elements when the page loads
es to the Lytics recommendation API is loaded after the DOM itself has loaded. To get around this, you can add the f

CSS

[data-pftrigger], [data-pfrecommend]{ display: none; }
This ensures that all recommendation blocks are hidden upon page load, and once Pathfora has loaded it will popul

Updated over 1 year ago
Promote Relevant Content to Users based on their Interests
Suggest Edits
Lytics audiences using Affinities in combination with Facebook custom audiences allows you to target known users w
s to promote an upcoming event, product launch, or a new piece of content for your brand. You can also use the sar
e relevant content to new users.

Identify Key Topics
The Lytics content affinity engine builds a topic taxonomy from content on your website. Lytics will use this taxonom
pic. These content affinity scores are available in the audience builder, and will be core to building your target audie

Select the piece of content you wish to promote. Then take some time to familiarize yourself with the topics in your L
levant to your content. You can sort by the average level of affinity on the topic list view to ensure you are using a po
re of these topics to include in an Affinity, which you can then use to create audiences.

Clicking on a topic displays a summary page which shows a full distribution of user interest.

lytics topic summary

Build an Audience Using Content Affinity
For most marketing use cases, it's useful to target users based on their interests in a group of related topics. For this
ic Affinities. You can also target users based on their interest in an individual topic. See our Audience Builder docume

Once you have your Affinity rules included, verify that the user count of your audience looks correct. If you plan to us
anywhere from 1,000 to 50,000 users. For a simple retargeting audience, you'll want to reach a broad number of use

Using your Lytics Audience in an Ad Campaign
To use your Lytics content affinity audience in Facebook lookalike ads campaign, Follow through with the steps belov

Export to Facebook
Create a Facebook Lookalike Audience
Assign your Lookalike Audience to an Ad
To run a retargeting ad to the users in this audience:

Export to Facebook as a custom audience.
Create your ad following your normal process. If you are building an ad for the first time, follow the Facebook Ad cre
Select the custom audience created by the export during the audience set up process of ad creation.
content affinity ad

Updated over 1 year ago
Reach the Right People Using Lytics
Suggest Edits
Isolated, channel-centric events, like website clicks or email opens, don't provide a comprehensive view of your custo
e the audience lists for your marketing ad campaigns can lead to your ad dollars being spent inefficiently by either ta
dividuals who are unlikely to convert.

Lytics helps you improve your ROI by advertising to the right people based on the content they are interested in and

Let Lytics Build Your Audiences
Using the Lytics JavaScript Tag, Lytics will catalog your website content in real-time and group individuals based on th
onally, using behavioral algorithms, the platform will analyze and score your customers by their overall engagement
aged'.

Content affinity audience
Audiences list

As your audiences change over time, use Lytics as a centralized hub for automatically syncing them with your conne
r DoubleClick for Publishers, for an up-to-date view of your target customers.

Refine Your Target Audience
The Lytics Query Language (LQL) allows you to refine your target audience and remove customers with certain profil
 spend.

Targeted Ad Campaigns
Examples of how Lytics audiences can help with your most common targeted advertising.

Smarter 'lookalike' prospecting with Facebook“Lookalike” audiences based on your most valued customers’ behavior
Target your users with content they are interested in using Lytics topics and content affinity scores for building your
Updated over 1 year ago
Retain Existing Customers With Lytics
Suggest Edits
Now more than ever, companies must focus on retaining and growing their existing customers. Acquiring customers
quisition tactics. For this reason, lower to mid-funnel tactics are gaining attention from CMOs. Companies can no lon

The following is the Lytics Playbook for retaining existing subscribers.

The framework
There are two important concepts within retention marketing as it pertains to Lytics. While these concepts apply acr
is playbook. For our purposes, we will define these concepts as follows:

Renewals: customers who have an upcoming renewal date.
Winbacks: recovery efforts for subscribers whose renewal date has lapsed.
How Lytics helps
Lytics helps you renew and winback customers in multiple ways:

Identifying individual users who have upcoming renewals.
Scoring the likelihood of renewal or churn.
Triggering cross-channel messaging to encourage renewal.
Executing targeted promotions and discounts.
Recognizing a user whose renewal date has past or subscription has expired.
Driving personalized winback communications across channels.
The big breakthrough for marketers is that retention teams now have the opportunity to automate consistent messa
found “Companies with extremely strong omnichannel customer engagement see a 9.5% year-over-year increase in
ly, strong omnichannel companies see a 7.5% year-over-year decrease in cost per contact, compared to a 0.2% year-

The playbook
Step 1: Create a renewals audience
Consider the fields available for renewal in your audiences. Some common ones might include the time of last purch
add additional criteria such as filters excluding complementary subscriptions.
Subscription-Screenshot

Effort	Impact	Developer Required
Low	Low (building block for cross-channel use cases)	No

Consider that you will likely have several renewals audiences - one per subscription.

Step 2: Export audience to all key integrations
The focus of renewals and winbacks will be cross-channel which can include:
Google, Facebook, Verizon Media (Yahoo Gemini), your email service provider (ESP) available as Integrations, and the

Step 3: Create on-site modals targeting renewals
The most common renewal tactic is to deliver on-site modals to users with an upcoming renewal. Take the renewal a

periences to target them. See the slide-out modal on the left side below as an example.

On-side Modals

Further instructions are available for business users and for developers.

Effort	Impact	Developer Required
Low	High	No, but helpful for detailed customization

Step 4: Add targeted email to your renewal journeys
The email inbox is one of the most impactful places to reach your renewal users. First, build an email in your ESP tha
ollow the instructions in your ESP to do so, and this varies considerably by tool.

Effort	Impact	Developer Required
Medium	High	No, but helpful for detailed customization of the email template

Once you have a triggered email built in your ESP, make use of the triggered email feature your ESP likely has.

Whatever ESP you have, you probably do not want to include “Existing Users” in the audience, so we recommend lea
s who enter your renewal audience will be sent the automated message. For examples of how you can go a step furt
Iterable use case.

Step 5: Involve telesales (optional)
Imagine incorporating your message across channels to even include telesales. Your telesales team likely has a stron
s ever could. There are two ways to incorporate telesales:

Encourage visitors to call inbound.
Deliver a list of leads for targeted outbound.
Effort	Impact	Developer Required
Low	Medium	No

Encourage Visitors To Call Inbound

Leveraging very simple HTML, you can create click to call campaigns in Orchestrate. Then, users on a mobile phone w

click-to-call-modal-small

Deliver a List of Leads for Targeted Outbound

Build a list of all the upcoming renewals you care about. Here’s an example using several audiences of subscriptions
telesales list:

subscription-building-block

Step 6: Incorporate direct mail (optional)
Using the same example as above, consider adding address information to the export and sending it to a fulfillment

direct-mail

As a final note, keep in mind there are many other areas to cover including copy choices, step-by-step optimization, a
playbook, but should be taken into consideration while developing your marketing strategy to retain customers.

Updated over 1 year ago
Personalize your Iterable emails With Lytics content recommendations
Suggest Edits
Lytics content recommendations provide powerful personalized, one-to-one recommendations. Sending content rec
h your brand.

This guide will cover how to implement content recommendations in email with Iterable as the email service provide
able's data feed to render them inline in your email template. This technique can be combined with other email use

y rich, personalized experience.

Although you will be using the Lytics API, no code is necessary to implement this solution beyond configuring some H

Before you begin
You should have an Iterable account with an audience export running and an HTML email template with a section pr
ndations can include any/all of the following:

Title
Description
Image
URL or link to the document
Author
Date of publication
You can start by setting up your template with some static content. For context, here's how the content recommenda
ncludes all of the fields listed above:

content recommendations in email

In addition, make sure you have a Lytics account with the content affinity engine activated. You will also need to gene

Build a content collection
To make recommendations, you will need a content collection. You can see our documentation on building content c
d of the content collection as you will use it in the next step.

Add content recommendation API as a data feed
To populate recommendations in the email, you will use the Iterable feature called a Data Feed to hook into the Lytic

Login to your Iterable account.
Navigate to Integrations > Data Feeds in the side bar.
Click + Create New Feed.
Enter "Lytics Content Recommendations" or some other descriptive title in the Name text input.
Make sure the JSON option is selected from the Format dropdown.
Copy and paste the following URL into the URL text input:

https://api.lytics.io/api/content/recommend/user/email/{{#urlEncode}}{{email}}{{/urlEncode}}?contentsegment=
At the end of that URL, paste the ID of the content collection you created in the previous step. This ID is the hash in t
In the Authorization Token field paste a Lytics API token with read permission for content and user search.
Verify that your settings look correct and then click Save Feed.
complete data feed
Enabling this data feed in a template allows Iterable to call the Lytics content recommendation API before each emai
}} with the URL encoded version of the recipient's email address. The next step will cover how to access the content r

You can add additional query parameters to the URL in the data feed to control things like the ranking of the recomm
commendation API documentation for a list of possible query parameters for this end point.

Modify your email template
Now that the data feed has been configured, it's time to apply it to your email template.

In Iterable open the template in edit mode.

Click the Advanced options tab and configure the following settings.

Check the Enable template generation using a data feed... checkbox.
From the dropdown, select the data feed you created in the previous step.
Check the Cache data feed response (cached for up to 1 hour).
(Optional) Check the Merge the data feed and user contexts checkbox.
advanced options

If you do not select Merge the data feed and user contexts, you will need to use square brackets [[value]] instead of
ed. The examples in this guide assume that this option is checked.

Under the HTML version of the template, click Source to view the HTML source of your template.

Locate the HTML of the recommendation section. You will need to implement templates for each of the fields you wi
response example in our API documentation, but in general each field should match the following format:

{{data.[i].fieldname}}
Where i is the current index of the recommendation (starting at 0), and fieldname is one of the following:

title: Title of the document
description: Description of the document
primary_image: URL of the document's image
url: URL of the document (excluding the protocol).
author: Name of the author of the document (this field may not be available for all content types).
created: Date that the article was published.
Here is some example HTML laying out all of these fields for 3 separate recommendations:

HTML

```
<!-- Recommendation 1 -->
<div>
<img alt="rec image" src="{{data.[0].primary_image}}" />
<h5>{{data.[0].title}}</h5>
<span>By {{data.[0].author}} | {{dateFormat data.[0].created format="full"}}</span>
<p>{{data.[0].description}}</p>
<a href="https://{{data.[0].url}}">Read More</a>
</div>

<!-- Recommendation 2 -->
<div>
<img alt="rec image" src="{{data.[1].primary_image}}" />
<h5>{{data.[1].title}}</h5>
<span>By {{data.[1].author}} | {{dateFormat data.[1].created format="full"}}</span>
<p>{{data.[1].description}}</p>
<a href="https://{{data.[1].url}}">Read More</a>
</div>

<!-- Recommendation 3 -->
<div>
<img alt="rec image" src="{{data.[2].primary_image}}" />
<h5>{{data.[2].title}}</h5>
<span>By {{data.[2].author}} | {{dateFormat data.[2].created format="full"}}</span>
<p>{{data.[2].description}}</p>
<a href="https://{{data.[2].url}}">Read More</a>
</div>
```

As seen above, you must add the http or https protocol in the href protocol before the URL field. Also the example a
an read more about this in Iterable's handlebars documentation.

Once you have finished editing the template, click Save Template. In the next step we'll verify that the data feed is wo

Previewing and verifying the recommendations
Iterable allows you to preview a rendered version of your email in the browser with live data from your data feed. Fo
h content recommendations.

rendered preview

Once you're happy with the preview, you are ready to send your campaign. You can implement your template into a

Rate Limiting
For best results, please talk to your Iterable representative about setting up a Message Send Rate Limit. The Lytics' C
cond, or 15,000 requests per minute. If the rate-limit is not enabled with Iterable, Lytics may return a 429 HTTP Statu

Troubleshooting
For more information on troubleshooting your templates, see Iterable's documentation on templating. If you're not
PI, please make sure that the email you are testing with exists as a valid profile in Lytics. You can verify this, by navig
, and searching for the user you are trying to preview as. The API documentation for content recommendations may
issues persist, feel free to contact support@lytics.com for further assistance in troubleshooting the Lytics API.

Updated over 1 year ago
Build a Custom Personalized Experience With Video Content
Suggest Edits
Video content is a great way to capture your users' attention. Serving your videos to a Lytics audience of users at wh
ngagement.

In this guide, you will learn how to create a widget with a video component. While videos are not natively supported
lback function to load a video with JavaScript. This callback can be applied to an Experience built through the UI with

Video Modal

Follow along with the video guide below or this written guide. You can download the complete JavaScript configurati
examples repository.

Javascript Configuration
Begin with a generic widget configuration.

JavaScript

```
var videoWidget = window.pathfora.Message({
  id: "video-widget",
  layout: "modal",
  className: "video-widget",
  headline: "iPhone XR available now",
  msg: "Get yours, or a discount on all previous models today from <strong>MEGASTORE</strong>.",
  okShow: true,
  okMessage: "Shop iPhones",
  cancelShow: false,
});

window.pathfora.initializeWidgets([videoWidget]);
```

This config will generate a simple modal, with a headline, message and call to action.

Simple Modal

To add a video to the modal, you can define an onLoad callback function. This function is called just before the moda
function as arguments include the widget's DOM element, which you will append the video element to.

JavaScript

```
var videoWidget = window.pathfora.Message({
  // config settings ...
  onLoad: function (event, module) {
    // add the video element
  }
});
```

Start by creating a div element which will later contain your video element. You may want to add a class name such a of the div with the code for your video. Note that you'll need to escape quotes within the HTML when transforming i

JavaScript

```
onLoad: function (event, module) {
  // create a div for the video
  var videoDiv = document.createElement("div");
  videoDiv.className = "pf-widget-video";

  // place the video in the div
  videoDiv.innerHTML = "<iframe src=\"https://www.youtube.com/embed/tG7vx7-3sl0\" frameborder=\"0\" allowfulls
}
```

Now that you have the video element within a div, simply insert the div into the widget. You can access the DOM noc this case module.widget. From there you will want to select two elements with the class names:

pf-widget-content the main div that contains content of the widget.
pf-widget-text a child div of pf-widget-content, which contains the text content of a widget.
Using the insertBefore function, you can insert the div containing your video into the main content div, before the te

JavaScript

```
onLoad: function (event, module) {
  // create a div for the video
  var videoDiv = document.createElement("div");
  videoDiv.className = "pf-widget-video";

  // place the video in the div
  videoDiv.innerHTML = "<iframe src=\"https://www.youtube.com/embed/tG7vx7-3sl0\" frameborder=\"0\" allowfulls

  // append the div to the widget node
  var content = module.widget.querySelector(".pf-widget-content");
  var text = module.widget.querySelector(".pf-widget-text");
  content.insertBefore(videoDiv, text);
}
```

With this new config you should now have a modal with a video! But it could probably use CSS to make it look cohesi

Video Unstyled

Styling the Video Modal
With some additional CSS work, you can style the video to fit your modal. Download the code for this example to see our modal.

Styled Video Modal

Once you've tested and are happy with the look and feel of your video modal, it's time for the most important step: c

Define the Lytics Audience
The example widget in this guide will be targeted at audience of users with a high content affinity score for iPhones, ur config with the audience slug you wish to serve the widget to.

Alternatively, you may build your widget as a web personalize Experience in the Lytics UI and apply the onLoad callb

Updated over 1 year ago

Unlock Additional Web Personalization Features with Lytics API Overrides
Suggest Edits
Lytics web personalize Experiences built through the Lytics UI are powered behind-the-scenes by the Pathfora JavaSc UI however such as custom forms, or JavaScript callbacks. Luckily you can apply these features to Experiences built t

In this guide, you will learn how to make an API requests to override the configuration of an Experience built in the L

 editor and API overrides. The overrides will include the custom form configuration, form error and success states, a
y.

Output Slideout

You can download the complete API request command for this example from the Github examples repository.

The primary benefit of using the Lytics UI in combination with API overrides instead of the Pathfora SDK is that your
access to the native Experience, Stage, and Journey reporting features in the Lytics UI without having to build custom

Building the Experience in Lytics
If you haven't already, you will need to build the base Experience through the Lytics Experience Editor. The goal is to
esired end state of the widget, and rely on the API overrides to fill in the gaps that are not available for configuration

Selecting a Tactic
Selecting the correct tactic is key, as it determines what type of Pathfora widget the Experience outputs. The tactics r

Drive Traffic - produces a message widget with CTA (okShow set to true).
Capture Leads - produces a form widget.
Present a Message - produces a message widget with no buttons (okShow set to false).
Recommend Content - produces a message widget with content recommendations and variant set to 3.
The example in this guide uses a form widget, thus you will select the Capture Leads tactic.

Experience Editor Steps
You will be dropped into the customize form step of the editor. Since the example form has custom checkboxes set t
he UI. Simply click the Next Step button.

In the design step enter the headline, body, and call to action text. Select the Slideout layout, and under theme you c
name custom-tracking-widget.

In the target step, select the audience you wish to show this slideout to. This example uses an audience of high inter

In the display step configure when and where you want the form slideout to display on your website. This step contr

Once you've completed all the steps, you may want to preview your Experience. Though it may not look or function i
foundation configuration which you will augment in the next step.

Legacy Form

You will also need to save the Experience to make API override requests. Be sure to click Save as Draft.

Creating the Override Request
To make the request for the override, you will need the ID of the Experience you just created. You can get this from t
ving it.

In the URL example below, the ID of the Experience is 2d3e345b2ac24acd9d6d3d33f93516fd:

ID in URL

You will also need a Lytics API token with the Admin role. It may help to save the token as an environment variable fo

Shell

```
export LIOKEY={api_token_here}
```

You will make a PATCH request to the Experience endpoint with the id of the Experience. This command example us

Shell

```
curl -s -H "Authorization: $LIOKEY" \
  -H "Content-Type: text/json" \
```

```
  -XPATCH "https://api.lytics.io/api/experience/{experience_id}" \
  -d '{
    JSON PAYLOAD WILL GO HERE
  }' | jq '.'
```
Your config changes will need to be nested in a field called detail_override this field itself is nested in the experience.

JSON

```
{
  "experience": {
    "vehicle": {
      "detail_override": {
        // configuration overrides
      }
  }
}
```
Next you will need to convert the JavaScript configuration into a JSON payload containing the settings which you wer

formElements - which customizes the form.
formStates - which sets the success and error states on form submission.
confirmAction - which handles the callback to send the data to a third party.
For the most part, you can translate a config to a JSON override in the same way that the JSON.stringify() function wo
rfectly for formElements and formStates:

JSON

```
{
  "experience": {
    "vehicle": {
      "detail_override": {
        "formElements": [
          {
            "type": "text",
            "required": true,
            "label": "Email Address",
            "name": "email"
          },
          {
            "type": "checkbox-group",
            "required": true,
            "label": "Which feeds would you like to subscribe to?",
            "name": "subscription_feeds",
            "values": [
              {
                "label": "Beauty & Perfumes",
                "value": "beauty"
              },
              {
                "label": "Electronics",
                "value": "electronics"
              },
              {
                "label": "Fashion",
                "value": "fashion"
              }
            ]
          }
        ],
        "formStates": {
          "success": {
```

```
        "headline": "Success",
        "msg": "Thanks for signing up, you can expect to receive updates in your inbox soon."
      },
      "error": {
        "headline": "Error",
        "msg": "There was an issue submitting your subscription. Please try again or <a href=\"/contact\">contact us<
      }
    }
   }
  }
 }
}
```

But for confirmAction, it gets tricky because it contains a JavaScript function:

JSON

```
{
 "experience": {
  "vehicle": {
   "detail_override": {
    // formElements
    // formState

    "confirmAction": {
     "waitForAsyncResponse": true,
     "callback": // callback function here somehow?
    }
   }
  }
 }
}
```

However, the API can accept a JavaScript function as a string. It may help to minify your function first. There are a nu
JavaScript for you. This helps for the API override because it creates a shorter, single line version of the function. This

JavaScript

```
function(e,a,t){if(a.data){var n=a.data.reduce(function(e,a){if(e.hasOwnProperty(a.name)){var t=e[a.name],n=Array.is
;return e},{}),r=new XMLHttpRequest;r.onload=function(){200===this.status?t(!0):t(!1)},r.open("POST","http://yourweb
application/json;charset=UTF-8"),r.send(JSON.stringify(n))}}
```

To include this function as a string, you will need to escape any double quotes within this before pasting it into your

JSON

```
{
 "experience": {
  "vehicle": {
   "detail_override": {
    // formElements
    // formState

    "confirmAction": {
     "waitForAsyncResponse": true,
     "callback": "function(e,a,t){if(a.data){var n=a.data.reduce(function(e,a){if(e.hasOwnProperty(a.name)){var t=e[a.
}else e[a.name]=a.value;return e},{}),r=new XMLHttpRequest;r.onload=function(){200===this.status?t(!0):t(!1)},r.open
er(\"Content-Type\",\"application/json;charset=UTF-8\"),r.send(JSON.stringify(n))}}"
    }
   }
  }
 }
}
```

Putting the whole thing together, your curl command will look like this:

Shell

```
curl -s -H "Authorization: $LIOKEY" \
  -H "Content-Type: text/json" \
  -XPATCH "https://api.lytics.io/api/experience/{experience_id}" -d '{
  "experience": {
    "vehicle": {
      "detail_override": {
        "formElements": [
          {
            "type": "text",
            "required": true,
            "label": "Email Address",
            "name": "email"
          },
          {
            "type": "checkbox-group",
            "required": true,
            "label": "Which feeds would you like to subscribe to?",
            "name": "subscription_feeds",
            "values": [
              {
                "label": "Beauty & Perfumes",
                "value": "beauty"
              },
              {
                "label": "Electronics",
                "value": "electronics"
              },
              {
                "label": "Fashion",
                "value": "fashion"
              }
            ]
          }
        ],
        "formStates": {
          "success": {
            "headline": "Success",
            "msg": "Thanks for signing up, you can expect to receive updates in your inbox soon."
          },
          "error": {
            "headline": "Error",
            "msg": "There was an issue submitting your subscription. Please try again or <a href=\"/contact\">contact us<
          }
        },
        "confirmAction": {
          "waitForAsyncResponse": true,
          "callback": "function(e,a,t){if(a.data){var n=a.data.reduce(function(e,a){if(e.hasOwnProperty(a.name)){var t=e[a.
}else e[a.name]=a.value;return e},{}),r=new XMLHttpRequest;r.onload=function(){200===this.status?t(!0):t(!1)},r.open
uestHeader(\"Content-Type\",\"application/json;charset=UTF-8\"),r.send(JSON.stringify(n))}}"
        }
      }
    }
  }
}' | jq '.'
```

Once you run the command, check that the response from the API includes your changes. You may make subsequer
erience.

Testing and Validating the Override
Once you've made the API request, you should be able to view the changes as part of the regular preview process fo
r your Experience. Click Preview and enter the URL you wish to preview the Experience on.

Note: If you are using the same browser session to preview the Experience that you did to create it, you may need to
sure that Lytics is serving the most up to date version of the configuration.

You should be able to see the updated Experience in the preview. If this is not the case there are two scenarios to tro

If your widget is not displaying at all, check the JavaScript console for errors. If you find a formatting error in the tran
our override command accordingly. This scenario can happen if you failed to escape quotes properly, for example.

If your widget is not displaying the changes, double check the response from the API and cross-reference your settin
n to ensure everything is named and formatted correctly.

If the issue persists, you can always contact Lytics Support for additional assistance with debugging.

Updated over 1 year ago
How to Use GTM Tags to Modify Lytics Pathfora Widget Behavior
a Tutorial to modify pathfora behaviour using custom javascript tags in GTM

Suggest Edits
Introduction
Google Tag Manager (GTM) is a powerful tool for managing tags, triggers, and scripts on your website. Lytics offers a
inesses to personalize and target content to their users. This article will show you how to use GTM to modify the beh
and CSS.

Prerequisites
A working knowledge of Google Tag Manager
Basic understanding of JavaScript and CSS
Access to your website's GTM and Lytics accounts
Step 1: Create a JavaScript Tag in GTM for Lytics Embedder
Go to your Google Tag Manager Dashboard and click on "New Tag."
Name the tag "Lytics Embedder."
Choose the tag type as "Custom HTML."
Paste your Lytics Embedder JavaScript code into the HTML field.
For example:

JavaScript

```
// Your Lytics Embedder code here
```
Choose the triggering event for your tag. For instance, you can set it to trigger when a custom event "embedder vari
Save and publish the changes.
Step 2: Create a CSS Tag in GTM for Lytics CSS Master
Go back to the GTM Dashboard and create another new tag.
Name the tag "Lytics CSS Master."
Choose the tag type as "Custom HTML."
Insert the CSS code wrapped in style tags into the HTML field.
For example:

HTML

```
<style>
// Your Lytics CSS Master code here
</style>
```
Set the trigger to "All Pages Page View" so the CSS will be applied universally.
Save and publish the changes.
Step 3: Testing and Validation
Open your website and inspect the Lytics Pathfora widgets to make sure they are behaving and appearing as intend

Use browser developer tools to troubleshoot any issues, such as incorrect application of styles or non-functioning Ja
Step 4: Customization and Advanced Uses
You can further customize the Lytics Embedder JavaScript to manipulate widgets based on user behavior or other ev
Similarly, modify the Lytics CSS Default to change the look and feel of the widgets to better align with your brand.
Conclusion
Utilizing Google Tag Manager along with Lytics' Pathfora framework can greatly enhance your ability to deliver perso
ng these steps, you can modify widget behavior and appearance directly from GTM, making your marketing efforts r

Example code
A javascript to dynamically alter pathfora behaviour:
Use this code in gtm and associate to a custom variable

```
<script>
  // Get the "h2" and "p" elements with their respective class names
  // var headlineElement = document.querySelector('.pf-widget-headline');
  var messageElement = document.querySelector('.pf-widget-message');

  // Get the "img" tag with class name "pf-widget-img"
  var imgElement = document.querySelector('.pf-widget-img');

  // Create a new "a" tag
  var linkElement = document.createElement('a');
  linkElement.href = messageElement.textContent;
  linkElement.classList.add('pf-widget-custom-href');

  // Append the "img" tag inside the new "a" tag
  linkElement.appendChild(imgElement.cloneNode(true));

  // Replace the "img" tag with the new "a" tag in the DOM
  imgElement.parentNode.replaceChild(linkElement, imgElement);
</script>
```

Lytics CSS Default - a js to update css dynamically in pathfora:

```
<style type="text/css">
/* lytics-small-modal start */
  .lytics-small-modal .pf-widget-content{
    display:none;
  }
  .lytics-small-modal .pf-widget-img {
    width: 100% !important;
    height: 100% !important;
    float: none !important;
    position: absolute !important;
    top: 0 !important;
    left: 0 !important;
    margin-left: 0 !important;
    border-radius: 0 !important;
}
  .lytics-small-modal {
  cursor: pointer;
  }
  .lytics-small-modal .pf-widget-body {
    width: 100%;
    height: 100%;
}
  .lytics-small-modal .pf-widget-close {
    z-index: 1;
}
.lytics-small-modal{
```

```
    width: 250px;
    height: 250px;
}
/* lytics-small-modal end */
  /* lytics-capture-leads styles start */
  .lytics-capture-leads .pf-widget, .lytics-capture-leads .pf-widget .pf-widget-body, .lytics-capture-leads .pf-widget-mes
-leads .pf-widget-checkbox{
    color: rgb(46, 46, 46) !important;
}
  .lytics-capture-leads{
  background-color: rgb(235, 177, 17) !important
  }
  .lytics-capture-leads .pf-widget-headline{
  color: white;
  }
  /* lytics-capture-leads styles end */

    /* lytics-preheader-modal styles start */
.lytics-preheader-modal{
	background-color: #ffb32a;
	min-height: 0;
	padding: 0;
    box-shadow: none;
}

.lytics-preheader-modal .pf-widget-message{
	color: black;
}

.lytics-preheader-modal .pf-widget-close{
	color: black;
}

@media (max-width: 600px) {
  .lytics-preheader-modal {
    display: none;
  }
}
    /* lytics-preheader-modal styles start */

  /* lytics-personalization-coupon styles start */
.lytics-personalization-coupon.pf-widget-modal.pf-widget-variant-2 .pf-widget-img {
    float: none !important;
    position: absolute !important!important;
    top: 20px !important;
    left: 5% !important;
    margin: 0% !important;
    width: 90% !important;
    height: auto !important;
    border-radius: 0px !important;
}
.lytics-personalization-coupon.pf-widget-modal.pf-widget-variant-2 .pf-widget-content {
    background-color: #EEB111 !important;
}
  .lytics-personalization-coupon.pf-widget-modal .pf-widget-message {
    font-size: 14px !important;
    margin: 0 0 0px !important;
}
  .lytics-personalization-coupon.pf-widget, .pf-widget .pf-widget-body, .lytics-personalization-coupon.pf-widget-moda
  color: black !important;
```

```
 }
 /* lytics-personalization-coupon styles end */
/* lytics-personalization-coupon black-back styles start */

 .lytics-personalization-coupon.black-back.pf-widget-modal.pf-widget-variant-2 .pf-widget-content {
   background-color: black !important;
}
 .lytics-personalization-coupon.black-back.pf-widget, .pf-widget .pf-widget-body, .lytics-personalization-coupon.black
 color: white !important;
 }
 /* lytics-personalization-coupon black-back styles end */


  /* lytics-big-modal styles start */
 .lytics-big-modal .pf-widget-img{
   position: relative !important;
   margin: 0 !important;
   top: 0 !important;
   left: 0 !important;
   border-radius: 0 !important;
   width: 100% !important;
   height: 100% !important;
   cursor: pointer !important;
}

 .lytics-big-modal .pf-widget-text{
   display: none !important;
}

 .lytics-big-modal .pf-widget-content{
   padding: 0px !important;
}
 .lytics-big-modal .pf-widget-close{
   z-index: 1 !important;
   color: black !important;
}
 /* lytics-big-modal styles end */
</style>
```
Updated over 1 year ago

Style your Lytics Web Experiences to Fit Your Brand Guidelines
Suggest Edits
Lytics web Experiences are meant to provide a very simple way for marketers to spin up personalized content on the
 for customizing the look and feel of your Experience. But if your website has specific style guides, you may prefer to

In this guide, you will learn how to construct a global stylesheet to establish a base set of styles for any Lytics Web Ex
ide will cover how to write more specific styles for a single unique widget, and how to troubleshoot common issues w

Bar and Slideout Styles

You can download the completed CSS and a JavaScript configuration for testing this example from the GitHub examp

Defining a Global Stylesheet
If you are planning to implement many web Experiences on your site, you will want to establish a stylesheet that will
help to generate an Experience or Pathfora config of each layout, and think about what you want to augment for eac
ideout, bar, gate, and modal widget to test against.

Slideout Bar Unstyled

Gate Unstyled

Modal Unstyled

The stylesheet in this guide will be kept light, by simply adding a background image to all widgets and tweaking some ever as you can imagine, you can go even further to change any aspect of the widget including the size or positioning t list of all of the class names of elements used in Pathfora widgets.

Start by adding some general styles you would like to apply to all widgets. pf-widget is the class name applied to the ontent is the first child element. For slideouts, the pf-widget-content is essentially wraps the same area as pf-widget. e entire page with a background overlay while pf-widget-content contains the modal content itself.

CSS

```
.pf-widget .pf-widget-content {
  background: url("assets/subtle-background.jpg") no-repeat;
  background-size: cover;
  font-family: "Helvetica Neue", "Arial" sans-serif;
  color: #666;
  border-radius: 0px;
  box-shadow: 0 0px 7px 0px rgba(0,0,0,0.3);
}
```

Bar Unstyled

There's a problem though, widgets with the bar layout don't have a pf-widget-content div. So you can adjust the sele

CSS

```
.pf-widget-bar.pf-widget, .pf-widget .pf-widget-content
```

Background Image

Next apply some additional styles to the call to action buttons. pf-widget-btn is the class name used on all Pathfora b tton.

CSS

```
.pf-widget .pf-widget-btn.pf-widget-ok {
  box-shadow: 0px 1px 1px rgba(0, 0, 0, 0);
  font-weight: normal;
  background-color: #5a88ca;
  border: 0;
  color: white;
  font-size: 16px;
}

.pf-widget .pf-widget-btn.pf-widget-ok:hover {
  background-color: #666;
}
```

Lastly add some styles to match the color of the headline with the widget text, and minimize the size of the the widg

CSS

```
.pf-widget .pf-widget-headline {
  color: #666;
}

.pf-widget .pf-widget-footer {
  height: 0;
  margin: 0;
}
```

Bar and Slideout Styles

These styles will cover future widgets you wish to build on the website. As you are building your own stylesheet, if yo
troubleshooting section.

Widget Specific Styles
Using the Experience Editor or the Pathfora SDK, you can define a custom class name for your widget. With this class
dget. Always preface your selector with the pf-widget class name to ensure that you don't accidentally effect other el

CSS

```
.pf-widget.your-custom-class
```

For a full in-depth example of specific widget styles, see the image customization guide.

Troubleshooting and Selector Specificity
A common problem when writing CSS for Pathfora widgets is providing the correct level of specificity when selecting
pected to see the change applied but didn't - this section is for you. The default CSS that the Pathfora library ships w
ect any other part of your website.

The main side effect of this is that developers wishing to override the default styles must pay special attention to the
default styles of the library.

Consider the following example using !important:

CSS

```
.custom-class .pf-content-unit h4 {
  font-weight: normal !important;
  font-style: italic;
}
```

The selector here is short and simple. However, because the the bold font-weight is embedded in a deeper selector i
t.

For reference, these is the relevant snippet of styles in the Pathfora CSS:

CSS

```
.pf-widget-variant-3 .pf-content-unit .pf-content-unit-meta h4 {
  font-weight: 500;
  margin: 0 0 5px;
  line-height: 1.4;
  color: #444;
}
```

Now consider how you would need to write this CSS without using !important:

CSS

```
.pf-widget.custom-class.pf-widget-variant-3 .pf-content-unit .pf-content-unit-meta h4 {
  font-weight: normal;
  font-style: italic;
}
```

This is a ridiculously long selector! However the advantage is you no longer need to know which styles need to be ov

Both techniques are valid and will result in the same changes to your widget. Feel free to use whatever method is ea
other CSS pre-processor that allows for nested selectors, what would longer selectors may be easier to interpret.

If you're not a fan of !important, continue reading for an in-depth look at how to easily derive the required level of sp

Utilizing Chrome Developer Tools
The best way to determine how to override a default style is to look the conflicting style from the CSS of the library. Y
ory which is open source, but it may be easier to debug your CSS using the Inspect Element feature in Google Chrom

Inspect Element

Locate the relevant element in your widget by clicking on it while in the element selection mode in developer tools. Y
the Elements tab. Examine the Styles tab for that element to see where the conflicting style is. Once you've located i
odification.

CSS

```
.pf-widget-variant-3 .pf-content-unit .pf-content-unit-meta h4
```

Then simply add the custom class of your widget accordingly to the selector:

CSS

```
.pf-widget.custom-class.pf-widget-variant-3 .pf-content-unit .pf-content-unit-meta h4
```

Add your rules, save your stylesheet, and test that the changes in the browser. Remember, you can always consult th
eb Personalize Experiences.

Updated about 1 year ago