Creating Campaigns

In This Document

Understanding a Standard Campaign

The basic implementation of campaign content is displayed as graphics inside Online Banking in designated locations within existing screens.

- Campaigns can be configured quickly to show varied Ad content to all members, during their use of Online Banking. Credit unions can have up to nine campaigns active at any given time.
- Ads for standard campaigns can be graphic displays only, or an embedded link which forwards a member to a specified URL. Standard Campaign links do not pass variables, or any other information, from the Online Banking session (e.g., Account Number, Name, etc.)

Mouse over to enlarge.

See **Understanding Campaign Types** for examples and more information on each campaign type.

Enabling The Campaign Feature

To ensure your campaign functions as expected, verify the completion of the following steps:

1. From the Admin Console, navigate to **Configuration** > **Features** > **Enable/Disable**.
2. Verify the Enabled selections for both **Member.Campaigns** and **Application.HBNetStart**.
3. Navigate to **Configuration** > **Feature** > **Edit Feature** > Select Feature : **Member.Campaigns**.
4. Edit the Feature Constant Values as needed.
5. Navigate to **Configuration** > **Features** > **Edit Feature** > Select Feature :**Application.HBNetStart**.
6. Verify the feature constant **CampaignsPanel** is Enabled.

Creating a Campaign

Campaigns consist of three components:

- **Campaign Record**
- **Campaign Ad**
- **Campaign Image**

Creating a Campaign Record

Regardless of the campaign you choose to create, you must first create a campaign record.

1. After logging into the Admin Console, navigate to **Configuration > Campaigns > Campaigns**.
2. On the right side of the screen, click the   **Add/Edit Campaign**.
3. Click   to clear the fields and begin a new campaign.

> You may need to click **Add/Edit Campaign** again if the fields are already cleared.

4. Complete the fields as follows:

Campaign ID	Include a unique, numeric ID for this required field. A suggested format is the starting date of the campaign in YYYYMMDD (i.e. 20141101).
Name	Description used for internal reference. The name only appears within the Admin Console itself.
Type	Set to **Default**.
Status	Set to **Active**. This allows the campaign to display on Online Banking screens between the dates set for the **Start Date** and **End Date** fields.
Start Date & End Date	Required fields. Date range during which Campaign should be active in Online Banking. Only used if Status is **Active**. Additional Information These fields allow Campaigns to be created and configured in advance of the Start Date, but not actively display any Ads until the Start Date. Ads will automatically stop displaying on the **End Date** without any intervention from administrative staff.
Priority	Set the priority to **1**. Allows prioritization of campaigns configured for the same position relative to other existing active Campaigns. A Priority of 1 is the highest display priority, and 100 is the lowest priority.
Display for Every-one	Select the check box. Ads are visible to all members on the Online Banking screens automatically. <hr> **Warning:** If this field is checked, the Update Host Accept Date field does not function, even if that field is checked for use. <hr>
Update Host Accept Date	If selected, the Accept Date field in the member's Campaign Tracking Record updates with the date the member accepted or declined the Ad and the Ad no longer shows. <hr> **Warning:** This field is dependant upon the setting of the Display for Everyone field. If the Display for Everyone field is checked, the function of this field is disabled, even if this field is checked. <hr>

5. Click   to save changes.

Creating a Campaign Ad

1. Navigate to **Configuration > Campaigns > Campaigns**.

2. Verify you created a **Campaign Record**.

3. Double click the record you created.

4. When the Add/Edit Campaign window opens on the right, click **View Ads**.

5. Click   to prepare the panel for a new Ad. It does not matter which existing Ad (if any) is currently selected.

6. Complete the following fields:

Stored Image	Leave blank. This populates after adding the image.
Image Path	Leave blank.
	This is a Stored Image Ad and does not use a Linked Image Path.
Answer	This field is not supported.
Image Alt Text	It is important to complete this field as this is seen on the screen and read by screen readers.
Weight	Select a number between 1 and 10. The display priority of the ad. The highest priority is 1.
	Higher weighted Ads receive display preference over lower weighted ads.
	The priority of the Campaign (set on the Campaign) will override this Weight field in regards to the display of the ad. If a higher-weighted ad belongs to a lower-weighted Campaign (by its **Priority** field), the Ads associated with the higher-priority Campaign will take precedence.
Status	Set to **Active**.
	Ad displays and can be included in rotating Ad displays.
Location	Select a location:

  • Main Banner

Select a location:

- Main Banner
- Main Banner Stackable
- Footer Left
- Footer Middle
- Footer Right

Mouse over to enlarge.

Ad Type	Select **Banner**.
	Other options are not supported.
Open Campaign Page	• **Unchecked**- member is sent to the URL defined within the Link field in the **Accept Link Info** section (see below) of this configuration if the Ad is clicked upon. • **Checked**- Ad is static, and no action occurs when clicking the Ad.
Auto Accept	Leave this box unchecked.
Channel Type	Select a channel: • HBNet • Mobile App • Both HBNet & Mobile App

7. **Optional**. The **Accept Link Info** and the **Decline Link Info** sections define the URL that a member forwards to, as well as the behavior of that URL, when a member selects Accept or Decline within an Ad.

   Both sections contain the same fields. Complete the fields in the following manner:

Link	The URL that redirects the member's browser when they click on either Accept or Decline.
Modal Window Title	This is not currently supported.
Open In	This field determines how the URL in the **Link** field behaves when clicked. • **New Window** (recommended) - Opens the URL in a new browser window.

- **Same Page** - Opens the URL in the existing browser window.

> This option is not recommended at it will utilize the existing Online Banking browser window session, effectively taking the member out of Online Banking.

- **Modal** - This is not currently supported.

Log Member Out	Leave blank as these are unsupported.
Internal Link	
Unique URL	
Campaign ID as Parameter	
Member ID as Parameter	
SDK Link	

8. Click _____ to save changes.