👨‍🎨[Figma Board link](https://www.figma.com/file/aYcl8Nody4F4cwYL6DMHtp/STAGING-Pyxis-Performance?node-id=7339%3A0)

[UX Pending Tasks](https://www.notion.so/UX-Pending-Tasks-c89797f452d34b8392c5b810ace82361)

**Campaign Overview Table Section**

The Campaign Manager dashboard will be the master view of all campaigns (Media plan and Experimental) created by the user. It will be further divided into 4 tabs:

1. Stories
2. Campaigns
3. Adsets
4. Ads

The user will have the option to select either one of the campaigns or multiple using the checkboxes provided against each row. Using the checkbox provided in the topmost row the user can select all the rows in the current view.

**Media Plans Tab**

When no search or filter functionality is applied, this tab will show the list of Media plans on each row along with specifying the number of campaigns in each created Media plan. The default columns will be as follows:

1. ON / OFF toggle

Currently: Media Plan off >> All campaigns off

Future Versions: Media plan off means that in the delivery of column of campaign/adsets/ads will show Media Plan off. However, the buttons will still show as ON

1. Generation status
2. Objective
3. Approval Status
4. Objective Metric
5. Created At
6. Duration
7. Target CPR
8. Actual CPR
9. CPR
10. Budget
11. Spends
12. Ad account

The Stories tab will contain 3 type of campaigns, these will be differentiated using icons:

1. Media Plans: The campaigns created on Pyxis using 'Tentative Media Plan' setup
2. Pyxis Campaigns: The campaigns created on Pyxis using 'Experimental' setup
3. Other Campaigns: The campaigns created by the user on FB business manager before being onboarded onto Pyxis

On selecting one or multiple media plans using the checkbox the 'Delete' button will be activated. The user can only delete media plans and cannot edit any detail in the Media plan after it has been published. This will delete all the attached campaigns from Facebook as well.

**Campaigns Tab**

When the user clicks on any of the rows on the story tab, the story gets selected and the user moves to the campaigns tab and he is shown the list of campaigns and their metrics.

When the user directly clicks on the campaign tab (without selecting a story), the list will show all the campaigns which are a part of the ad account.

In case nothing is selected, all the campaigns/adsets/ads in the ad account will be displayed under each tab.

The campaigns will also have an extra "Parent Campaign" column which specifies if it was created using automation on any of the other campaigns. The campaign type (media plan or pyxis campaign) will be shown under the name of each campaign. If the campaign is a smart campaign then the icon for that will also be shown.

For non-media plan campaigns: the edit, duplicate and delete feature will be available. For media plan campaigns, the duplicate feature will be available. The logics for how duplicate will work for media plan campaigns, is explained in the [duplicate section](https://www.notion.so/Campaign-Management-3833d2977b7749f99ad7d8e2300873f6). These options will become visible when the user selects one or more campaigns using the checkbox.

At a campaign level the following details are editable:

1. Name
2. Campaign Budget
3. Campaign Spending Limit

**Ad Sets Tab**

When the user clicks on any campaign row on the campaign tab, he is redirected to the ad set tab which shows the list of all the ad sets contained inside the selected campaign.

For non-media plan campaigns: the edit, duplicate and delete feature will be available. These options will become visible when the user selects one or more ad setss using the checkbox.

At an ad set level the following details are editable:

1. Name
2. Budget
3. Start Date
4. End Date
5. Minimum Spend Limit
6. Maximum Spend Limit
7. Age
8. Gender
9. Delivery Optimisation
10. Bid Strategy
11. Billing Event
12. Delivery type
13. Placements
14. Devices type
15. OS

Depending on the setup (primary objective, optimization event, etc) details a subset of these details will be editable, the details for the same [here](https://docs.google.com/spreadsheets/d/1n1ykpIYsKLmqa5ybVHwFKLo6TrQf-dC1BPbHsCyYguk/edit#gid=1013440968).

Explain all actions that can be done on the ad sets in this section. Quick Edit, Duplicate. How Duplicate works on Ad Sets, What all Edit options available at campaigns level. (Redirect to the individual Duplicate / edit section in the doc)

Explain what all functionalities we will be providing in the top tools bar. (Search, Edit, Filter)

Explain the columns that should be present in this tab. And the contents of each column.

What all columns will be configurable. Setup, Reporting.

What all additional labels we will be adding on campaigns. (Media Plan, Parent campaign etc)

**Ads Tab**

When the user clicks on any ad set row on the ad set tab, he is redirected to the ads tab which shows the list of all the ads contained inside the selected ad set.

For non-media plan campaigns: the edit, duplicate and delete feature will be available. For media plan based ads, duplicate will be available. These options will become visible when the user selects one or more ads using the checkbox.

At an ads level the following details are editable:

1. Name
2. Page
3. Primary text
4. Website URL
5. Display link
6. Headline
7. Description
8. Call to action
9. URL Parameters

Explain all actions that can be done on the ad sets in this section. Quick Edit, Duplicate. How Duplicate works on Ads, What all Edit options available at campaigns level. (Redirect to the individual Duplicate / edit section in the doc)

Explain what all functionalities we will be providing in the top tools bar. (Search, Edit, Filter)

Explain the columns that should be present in this tab. And the contents of each column.

What all columns will be configurable. Setup, Reporting.

What all additional labels we will be adding on campaigns. (Media Plan, Parent campaign etc)

**Right panel**

The screen will also have an expandable right hand column which will contain the following functions. These will get activated when the user selects any campaign, adset or ad, except for media plan campaigns.

**Logs**

<https://s3-us-west-2.amazonaws.com/secure.notion-static.com/61bf1503-118a-4a17-b33c-57199d0d3358/logs.mov>

When the user selects any campaign, adsets or ads the show logs button becomes activated and he can use that to view the changes made on them in a consolidated manner. The logs table will contain the following columns:

1. Activity - Action performed (eg: name changed, budget increased etc)
2. Activity Details - Changed from >> Changed to
3. Items changed - Link of the campaign/adset/ad which was changed
4. Changed By - Name of the user who made the change (can be facebook or pyxis too)
5. Date and time - Time stamp of when the change was made

The user can also choose to filter the logs by the following methods:

1. Tactic logs / Other logs
   1. Automation Tactic
   2. Targeting Tactic
2. Activity type
   1. All
   2. Account
   3. Ads
   4. Ad sets
   5. Audience
   6. Bids
   7. Budget
   8. Campaign
   9. Schedule
   10. Run Status
   11. Targeting
3. Changed by
   1. Anyone
   2. Facebook
   3. Pyxis System
   4. List of all users having access to the account
4. Date Range

**Edit**

**Multiple Edit**

When the user selects multiple campaign/ad sets/ads to edit, a pop-up opens up and the left part will contain the list of parameters that are editable. And the user has the option to individually change each row or he can select all of them and put the same value to all. The user has the option to select which field he wants to edit using the dropdown near the edit button, in which case only the pop-up screen opens on top of the table view.

When the user clicks on the overall edit button, the right side panel expands to show the setup screen with the initial values pre-filled. When the user selects multiple campaigns/adsets/ads to edit the input fields will be shown as 'Mixed values' with an option to 'View and edit'. This opens up the bulk edit pop-up exactly like the quick edit.

When the right panel expands, the user will get to view of the breakdown of selected campaign/adsets/ads. In case of multiple selections, the breakdown will be displayed one below the other. When the user clicks on any of the campaigns/adsets/ads the setup for the same is shown.

Campaign 1

Adset 1.1

Ad 1.1.1

Ad 1.1.2

Ad 1.1.3

Adset 1.2

Ad 1.2.1

Ad 1.2.2

The user has to be notified here about what was the value of his previous parameter and what he has changed it to. We will ask for confirmation and proceed to make the changes on multiple items.

**Single Edit**

When a user wants to edit one campaign/ad set/ads at a time, the right panel expands with the setup screen, and the initial values are shown. The fields which are available to edit after the campaign is published the user can change, for campaigns in draft the user can edit everything.

**Tactics**

When the user selects one or multiple campaigns/ad sets/ads, if any automation is active on them the tactics button will redirect to tactic overview page which is filtered basis the selection.

Explain how the edit flows will work from here. [(Redirect to the tactics section)](https://www.notion.so/Campaign-Management-3833d2977b7749f99ad7d8e2300873f6) - To be decided

**Toolbar**

The tool bar will have the following options, the buttons will be disabled until the user selects anything. The following options will be available at each level:

1. Story level : Delete
2. Campaign level: Delete, duplicate, edit, tactics, make smart campaign
3. Ad set level : Delete, duplicate, edit, tactics, audience manager, make smart adset
4. Ad level: Delete, duplicate, edit, tactics, preview

**Add more columns**

Using the add more column the user can add a column of metrics he wants to view for the campaigns. He can add columns showing performance metrics, setup data, delivery metrics, etc.

1. Performance (default)
2. Setup
3. Delivery
4. Engagement
5. Video Engagement
6. App Engagement
7. Carousel Engagement
8. Performance and Clicks
9. Cross device
10. Offline Conversions
11. Targeting and Creative
12. Bidding and optimisation
13. Media Plan Metrics
14. Tracking

[Metrics list supported](https://www.notion.so/Metrics-list-supported-9dd9b662cc9b4b579037762199786a1c)

**Download Report**

After the user has added the required columns, the user can create a report for all columns and campaigns he has selected between the selected dates. The user can select which format the report is to be downloaded in CSV or xls. All the data (rows: based on the filter/search applied, columns: default + custom columns selected) will be downloaded into the user's system in the selected format.

In future versions the user will have the option to schedule the report to be downloaded periodically and also send it to someone using their email id (similar to media plan approval flow).

**Breakdowns:**

**Search and Filter:**

<https://s3-us-west-2.amazonaws.com/secure.notion-static.com/6009e887-0190-4bd5-894e-34bcfe6853ef/SearchFilter.mov>

The search bar on the screen will be used to match the names of campaigns, ad sets, or ads using the custom text the user enters. Also, the user can filter by:

1. Name (contains or does not contain)
   1. Campaign Name
   2. Adset Name
   3. Ad Name
   4. Campaign ID
   5. Adset ID
   6. Ad ID
   7. Page ID
2. Delivery
3. Objective
4. Placement
5. Campaign/adset/ad metrics
6. Audience

**View Setup toggle:** The view setup toggle, changes all the columns to display the setup data for each campaign/adsets/ads. The default columns of metrics will be as follows:

Campaign level:

1. Delivery
2. Bid strategy
3. Budget
4. Attribution
5. Result
6. Reach
7. Impressions
8. CPR
9. Amount spent
10. Ends
11. Link clicks
12. Website purchases
13. FB purchases
14. Mobile app purchases

Adset Level:

1. Delivery
2. Bid strategy
3. Budget
4. Attribution
5. Result
6. Reach
7. Impressions
8. CPR
9. Amount spent
10. Ends
11. Schedule
12. Frequency
13. Unique Link clicks
14. Link clicks
15. Landing page views
16. Cost per landing page view

Ad level:

1. Delivery
2. Bid strategy
3. Budget
4. Attribution
5. Result
6. Reach
7. Impressions
8. CPR
9. Quality ranking
10. Engagement ranking
11. Conversion ranking
12. Amount spent
13. ends
14. Frequency
15. Unique Link clicks
16. Link clicks
17. Landing page views
18. Cost per landing page view

**Create New Campaign button:** The create new campaign button will first redirect to a pop-up asking the user if he wants to create a tentative media plan or a normal campaign. Refer to [create campaign](https://www.notion.so/Campaign-Management-3833d2977b7749f99ad7d8e2300873f6) for further details.

**Search & Filter**

<https://s3-us-west-2.amazonaws.com/secure.notion-static.com/ad7c3e75-fc07-4bca-ae8e-7315c4f822d6/search_and_filter.mov>

The search bar on the screen will be used to match the names of campaigns, ad sets, or ads using the custom text the user enters. Also, the user can filter by:

1. Name
2. Delivery
3. Objective
4. Placement
5. Campaign/adset/ad metrics
6. Placement
7. Audience

Based on the filters selected by a first time user, the system should automatically save the filters used. On the next usage of this feature the user can create a new filter or use an existing one. The user should also have the functionality to delete the saved filters if required.

**Edit**

Quick edit

Overall Edit

**Duplicate**

<https://s3-us-west-2.amazonaws.com/secure.notion-static.com/9773372b-c82d-4cba-a5e6-3ca4f27ad991/duplicate.mov>

Won't be available at stories (category) level.

At Campaign level: The user tells us the number of copies he wants to create

Ad set and Ad level: The user needs to select whether he wants to -

1. Create New Campaign >> Continue to Setup campaigns
2. Use current campaign
3. Existing campaigns >> Search and Select existing campaigns in the ad account

Next he will select the number of copies he wants to create.

For the media plan adsets, the duplicate cannot be done inside the original campaign as the media plan cant be edited. In this case, only 2 options will be available:

1. Create new campaign >> Only pyxis campaigns
2. Existing campaigns >> Search and select non-media plan campaigns in the ad account

**Sorting**

<https://s3-us-west-2.amazonaws.com/secure.notion-static.com/316d7f7d-c424-44b0-b8f5-dd3767a5457f/sorting.mov>

Each column will have a sort option available which will reconfigure the entire campaign/adset/ad table to be sorted based on the selected column.

1. For Numeric columns: Ascending and Descending
2. For Text columns: A to Z and Z to A

**Preview**

The preview button will be available in the toolbar only for ad level tab. The pop-up will open up and show the preview of how the ad will look at the various placements selected across multiple devices

**Delete**

The user can choose to delete one or multiple campaigns/adset/ads by selecting them and clicking on the delete button. The system will ask for a confirmation and the required deletions would be executed.

**Audiences**

When the user selects any adset, the audience button gets activated on the adset toolbar. On clicking on the same the user is redirected to the 'Audience Manager' (to be built) section.

This button will be available only at ad set level.

**Tactics**

The user can select multiple campaigns/adsets/ads to view or add tactics from the toolbar. Refer below for more details.

**Create Campaign**

When the user clicks on Create a new campaign, he will be asked which type of campaign is to be created 'Tentative Media Plan' or 'Normal Campaign'.

<https://s3-us-west-2.amazonaws.com/secure.notion-static.com/a2edc4bb-a501-45d4-aa8f-2e7ee8ede30f/create.mov>

**Media Plan**

Check this [link](https://docs.google.com/document/d/17RmCjQ9TDZyEkZNOJouCJMsag4zEJmQv/edit) .

Explain how the media plan create flow will work

**Normal Campaign Setup**

When the user selects 'Normal Campaign' then the following fields would be required to create a new campaign on Facebook:

Create new Campaign

1. Create New
   1. Choose a campaign Objective (Radio buttons)
      1. Reach (currently supported on Pyxis)
      2. Traffic (currently supported on Pyxis)
      3. Brand Awareness
      4. Engagement
      5. App Installs (currently supported on Pyxis)
      6. Video Views
      7. Messages
      8. Conversions (currently supported on Pyxis)
      9. Catalog Sales
      10. Offline Sales
   2. Name your Campaign (optional) (text field)- User has the option to use placeholders like Campaign ID and objective here. Refer to the targeting expansion section in this document.
   3. Special Ad Categories (on/off toggle) - User is required to declare if your ads are related to credit, employment, housing, social issues, elections or politicsDropdown when ON:
      1. Credit
      2. Employment
      3. Housing
      4. Election or Politics
   4. Buying Type (dropdown)- Auction
   5. Campaign spending limit (optional)Set an overall spending limit for ad campaigns. This means the ad sets in the campaign will stop once you've reached your spending limit. This option is not available when using a campaign lifetime budget.
   6. Campaign Budget Optimisation Campaign budget optimization will distribute budget across ad sets to get more results depending on delivery optimization choices and bid strategy. You can control spending on each ad set.
      1. When ON
         1. Campaign Budget
            1. Lifetime
            2. Daily
         2. Campaign Bid Strategy
            1. Lowest Cost
            2. Bid Cap
            3. Cost Cap
            4. Minimum ROAS
         3. Ad Scheduling Available only when budget is set to ‘lifetime’
2. Use Existing
   1. Select Campaign
      1. Adsets
         1. Create New
         2. Use Existing
      2. Ads
         1. Create New
         2. Use Existing

Usual campaign creation/edit flow continues after this

Create New Adsets

1. Adset Name
2. ‘Objective’ location (not required in Pyxis Currently)
   1. Website
   2. Apps
   3. Messenger
   4. Whatsapp
3. Dynamic Creative (not required in Pyxis Currently)

Creative elements, such as images and headlines will be automatically generated optimised for the user's audience. Variations may include different formats or templates based on one or more elements

1. Offers (not required in Pyxis currently)
2. Budget and Schedule Can be set at an adset level only when CBO is turned off at Campaign Level
   1. Daily Budget
   2. Lifetime budget
   3. Budget Input field
   4. Start Time (prefilled with current time can be edited too)
   5. End time (optional)
   6. Ad scheduling - Users can schedule your ads for specific hours and days of the week. (not required in Pyxis Currently)
3. Audience
   1. Create New Audience
      1. Custom Audience
         1. Create New
            1. Lookalike
            2. Custom Audience
         2. Search and Include Custom Audience
         3. Search and Exclude Custom Audience
      2. Location
         1. Conditions
            1. People living in this location
            2. People living or recently in this location
            3. People recently in this location
            4. People traveling to this location
         2. Add Locations
            1. Include
            2. Exclude
            3. Add in Bulk (not required in Pyxis Currently)
         3. Age
            1. Min
            2. Max
         4. Gender
            1. All
            2. Men
            3. Women
         5. Detailed Targeting
            1. Include

Search Interests

Browse

Demographics

Interests

Behaviour

* + - * 1. Exclude

Search Interests

Browse

Demographics

Interests

Behaviour

* + - * 1. Narrow down audience (available only for inclusion of interests)

<< Limit: tbd>>

* + - 1. Detailed Targeting Expansion - Reach people beyond the user's detailed targeting selections when it's likely to improve performance.
      2. Languages
      3. Connections
         1. Pages

People who like your page

Friends of people who like your page

Exclude people who like your page

* + - * 1. Apps

People who have used your app

Friends of people who used your app

Exclude people who used your app

* + - * 1. Events

People who responded to your event

Exclude people who already responded to your event

* + - * 1. Advanced Combinations

People who are connected to your page/app/event

Friends of people who are connected to your page/app/event

Exlude People who are connected to your page/app/event

* + - 1. Save this Audience
         1. Enter Audience Name

1. Use saved Audience
   1. Search Saved Audience
      1. Edit Saved Audience(Same fields as create audience opens with prefilled entries)
2. Placement
   1. Automatic
   2. Manual
      1. Devices
         1. All
         2. Mobile
         3. Desktop
      2. Platform
         1. Facebook
         2. Instagram
         3. Messenger
         4. Audience Network
      3. Asset Customisation
      4. Device and OS
         1. All
         2. Android
         3. iOS
      5. Brand Safety
      6. Inventory Filters
         1. Full
         2. Limited
         3. Standard (Default)
      7. Block Lists (not required in Pyxis Currently)
      8. Content type exclusions (not required in Pyxis Currently)
      9. In stream exclusions (not required in Pyxis Currently)
3. Optimisation and Delivery
   1. Optimisation for ad delivery - Function of the primary campaign objective
      1. Link Clicks
      2. Landing page views
      3. Daily unique reach
      4. Impressions
   2. Cost control (optional)
      1. Enter amount
      2. Lowest Cost
      3. Cost cap
      4. Bid cap
   3. When you get charged
      1. Impressions
      2. Link click
   4. Delivery type
      1. Standard - Standard delivery uses pacing to control your spend. Pacing keeps you from spending your budget too quickly and is the recommended and preferred option for most advertisers.
      2. Accelerated - Accelerated delivery can be useful for time-sensitive promotions. You need to set a bid cap to use accelerated delivery.

**Targeting Expansion (Create Multiple Adsets within a campaign)**

After adding the targeting details while creating an adset, the user can choose the create multiple adsets with specific targeting details in each parameter.

The user can choose to create multiple adsets based on:

1. Interest
2. Age (split by 5,10 or 15 years)
3. Gender
4. Location
5. Custom Audiences

For example: A user sets the targeting for a particular adset as:

Age Range: 18 - 35

Locations: Mumbai and Bangalore

Now the user wants to create multiple adsets using this targeting, he can split the age range by 10 years and the also split the location. So this setting will create 4 ad sets

Adset 1: 18-27 and Mumbai

Adset 2: 18-27 and Bangalore

Adset 3: 28-35 and Mumbai

Adset 4: 28 - 35 and Bangalore

**Naming of Campaigns/adsets/ads**

We will use the Nomenclature currently in use for naming campaigns, adsets, and ads. Find the detailed description of the system [here](https://docs.google.com/spreadsheets/d/1tgo4s-lGPceQzf-0k5zdEDx99W8maW6_NesH9s9SUBQ/edit?ts=60000818#gid=0).

The user can however at the end of the name add macros to the name for ease of identification and filtering. Macros are basically kind of a placeholder which will get replaced with the actual parameter based on the setup of campaign, adset, or ads.

[List of Macros](https://www.notion.so/List-of-Macros-cbc4ef8d14a14842b68df86699847aba)

**Ads Preview Section**

While creating/editing an ad the preview of the placements should be automatically visible, based on all available placements selected by the user while setting up the adsets.

**Audience Size Preview**

At an adset level, when the user sets the parameters of age, gender, custom audience, location etc. The system will send an API request to Facebook to calculate the potential reach of the settings selected.

The audience should be shown in a visual manner ranging from specific to broad. << The logic for deciding on the limits for specific and broad to be decided >>

The specific audience should be represented by red and the broad as green.

Explain in detail what all we will be supporting for setting up the campaign.

Here, add the parts - of all the fields - which we will support, which we wont and so on.

How our expansions will work. (revealbot)

About additional functionalities - like macros, Audience size preview etc.

Explain how the audience saving, ad creative saving will work.

**Edit**

<https://s3-us-west-2.amazonaws.com/secure.notion-static.com/5c640aab-6b1a-4cc2-8a7e-fa369fdc5c08/edit.mov>

The user can select one or multiple campaigns/adsets/ads to edit. He might choose to edit from the edit button present in the tool bar or from the edit button on the right panel.

The edit can be of the following 2 types:

Explain from what all places user can land on edit.

He can click on edit button next to campaign / adset / ad, he can multiselect from top tool bar, he can click on edit in the right panel etc.

Explain how the user will navigate between campaign / adset / ad inside the edit section.

**Quick Edit**

When the user selects quick edit on any of the tabs. The dropdown of the all fields available to edit is displayed. On selecting any one of them the bulk edit screen for campaign/adset/ads slides in from the right panel.

Explain how quick edit will work. What all fields available in quick edit at every level - campaign, adset, ad.

Explain the dependencies on other campaign settings - what all will effect which editing functionalities.

**Overall Edit**

On clicking on the overall edit button the right panel slides out with the create campaign/adset/ads form. If the user i wants to edit one campaign/adsets/ads at a time then the values would be shown.

In case of multiple selections, the values would appear as mixed values with an option to to view and edit. On clicking that , the bulk edit screen opens up.

**Duplicate**

Refer above

**Tactics**

Automations applied on the selected campaign/adsets/ads level will be shown by expanding the right panel. If no automations are present, the message will be displayed and the option to create an automation will be given to the user. This will take the user directly to the automation type (performance or targeting) screen in the expanded right hand panel.

Based on whether the selection is an campaign or adset or ad, the available actions will be displayed.

**View**

As explained, only the tactics applied on the selected campaigns, adsets, and ads will be visible to the user on the expanded right panel. The user will also have the option to add a tactic on the selected campaigns/adsets ads. The user can also select one or many tactics displayed to edit. Then the tactic setup opens up with the prefilled values.

**Edit**

When the user clicks on the Edit button the setup page opens up with pre-filled values. The user can change the setup (budget, adset type, the condition applied). The campaign/adset selection screen will be skipped since the user has pre-selected the campaigns/adset he wants to create/edit tactic on. The system asks for a confirmation to edit the tactic.

**Create**

When the user selects some campaigns/adsets/ads on which no tactic is applied, the user can choose to create one on them. When he clicks on the create button, the expanded right panel will start the tactic creation flow.

1. Ask for the type of tactic to be created (performance or targeting)
2. Based on the selection, the user is redirected to the 2 tactic creation flow.
3. The step where the campaigns/adsets/ads are selected to apply the tactic will not be there, as the selection has already been made by the user from the dashboard view
4. Depending on the type of automation selected the user will input the additional required fields