Clients Handover

TSB

Areas TSB usually asks for support on:

Experience Targeting (XT): They have a lot of experience targeting activities running – please take some time to familiarise yourself with this experience type.

Auto-Target: TSB has used this experience type before and there is a new test coming up that will be built using auto-target. It is not complicated to setup but you will need to look at the documentation to familiarise yourself with it.

Exclusions: A lot of times they find themselves in the situation where they need to mutually exclude an XT with an A/B test. This cannot be achieved through traditional mutual exclusion because usually the audiences they use are subsets of a bigger audience which means a better way of achieving mutual exclusion is by excluding the subset audience from the bigger one. E.g. If the A/B test is targeting all Credit Cards users and the XT activity is targeting CC users that fall into the Decile 1 audience you could exclude the Decile 1 audience from the A/B test.

Secure site journey: Their secure site uses the same URLs regardless of the journey (CC vs PCA etc). This means that, in order to target correctly, we require a background experiment that detects which journey the user is on and makes a call to the main experiment that serves the variations (please refer to the technical document in this folder for technical details).

OTP: the secure site needs to be accessed through an OTP, you can login and then you'll need to request the OTP using one of the numbers listed. Please contact the person to receive the OTP:

1. Phone number ending in 123 – contact Simon Gripton
2. Phone number ending in 970 – contact Julia Megginson

Login details:

SR828TESTFIVE

Testing321

t35ting

Category Affinity: I have recently been asked to look into setting up category affinity for TSB. I looked at their site and these are my findings/next steps.

They have a bit of code running that is detecting the URL, extracting the category and passing that through to adobe. Now, the regex doesn't seem to be working, also it's not ideal to use the URL. What I would suggest is for them to pass the Tealium variable called page_category rather than using the URL. M&S used Tealium too so I can write some code that will pass the variable but they should first of all be happy changing the code they wrote and then second of all we should test this on a staging environment rather than in production straight away

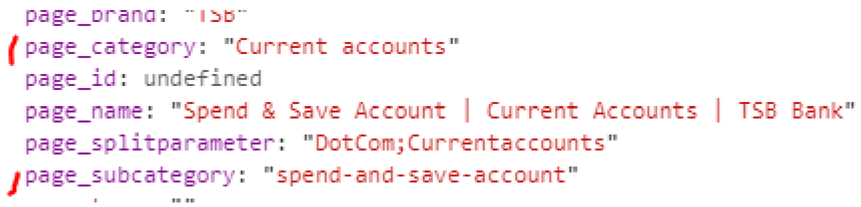
So what the OS should do (in my opinion) is:

- Ask if they are happy to use the Tealium variable rather than the URL as category to be passed to adobe target.
- Make sure they are happy for us to change their code.

- Once the code is ready they will need to update their utag_sync code with our js code on the staging site
- We will then first get access to it, then test that everything works correctly
- They can then push the code live in production.

(You can use the sample code from D4LB).

When writing the code you should scan their datalayer (you can use Tealium datalayer called utag_data) to find the most suitable variable. A suggestion would be to use the page_category – page_subcategory: eg: Current accounts – spend-and-save-account



```
page_brand: "TSB"
page_category: "Current accounts"
page_id: undefined
page_name: "Spend & Save Account | Current Accounts | TSB Bank"
page_splitparameter: "DotCom;Currentaccounts"
page_subcategory: "spend-and-save-account"
```

DL4B

New version of at.js: DL4B has implemented the new version of at.js on the brochureware side of their site.

We have tested it and everything seems to be working correctly. At some point in the future they will also implement the new version of at.js 2.x on the Quote & Buy journey. When they do that we’ll need to test that the implementation is correct by running a blank experiment.

Views:

At.js works by defining views, a view can be an entire page or a section of a page. The Q&B journey is an SPA which means you’ll need to ask them to setup separate views in order to target a specific journey e.g. Van journey only and also a specific section of the journey.

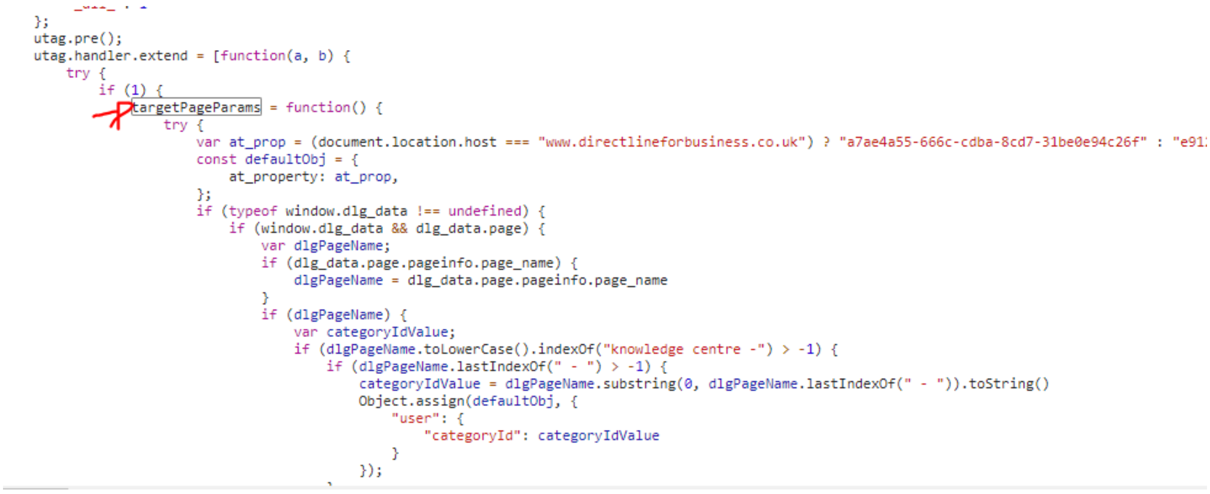
These views should then be tested again with a blank experiment.

Testing on the Q&B with at.js 1.x:

If DL4B wants to test on their Q&B journey with the at.js 1.x (which is what they currently have) then you can test using the same technique you are using for TSB secure site (the background experiment would be tracking where the user is on the journey and the main one displays the variation). There is one caveat, on the background experiment you also need to pass the at_property (NB!)

Category affinity:

This has been setup on their website, you can check the code from the network tab by filtering based on “delivery” then clicking on the initiation utag.js. This will open up the code, you can click on pretty-print and you can then search for the definition of the function “targetPageParams”.



```
};
utag.pre();
utag.handler.extend = [function(a, b) {
    try {
        if (1) {
            targetPageParams = function() {
                try {
                    var at_prop = (document.location.host === "www.directlineforbusiness.co.uk") ? "a7ae4a55-666c-cdba-8cd7-31be0e94c26f" : "e91
                    const defaultObj = {
                        at_property: at_prop,
                    };
                    if (typeof window.dlg_data !== undefined) {
                        if (window.dlg_data && dlg_data.page) {
                            var dlgPageName;
                            if (dlg_data.page.pageinfo.page_name) {
                                dlgPageName = dlg_data.page.pageinfo.page_name
                            }
                            if (dlgPageName) {
                                var categoryIdValue;
                                if (dlgPageName.toLowerCase().indexOf("knowledge centre -") > -1) {
                                    if (dlgPageName.lastIndexOf(" - ") > -1) {
                                        categoryIdValue = dlgPageName.substring(0, dlgPageName.lastIndexOf(" - ")).toString()
                                        Object.assign(defaultObj, {
                                            "user": {
                                                "categoryId": categoryIdValue
                                            }
                                        });
```

The function relies on the window.dlg_data datalayer and it’s data_page.pageinfo.page_name property.

The value of this property is passed to the user.categoryId.

NB: the code doesn’t return anything on the Homepage, that is because we don’t want to return “Homepage” as a category.

The code is saved in Sharepoint under Direct Line > AB testing > CATEGORY AFFINITY

Category affinity:

This is an algorithm that works by passing a category parameter user.categoryId.

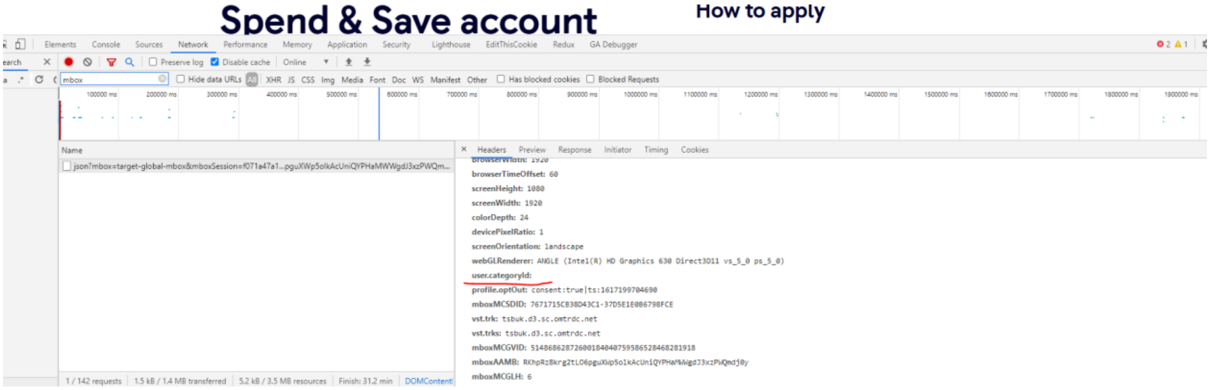
This parameter should ideally be taken from the datalayer, in adobe, parameters can be passed through the targetPageParams function. The DL4B code is attached to this email as an example.

So the steps are:

1. Write the code that will pass the parameters to adobe.
2. Ask the client to implement the code on the site (usually best to start with the staging site).
3. One this is done you can go to the network tab and check if the param is passed correctly:

At.js 1.x version:

Go to the network tab > filter by “mbox” > locate the target global mbox > click onto it > go to the headers tab and scroll down until you see the user.categoryId:



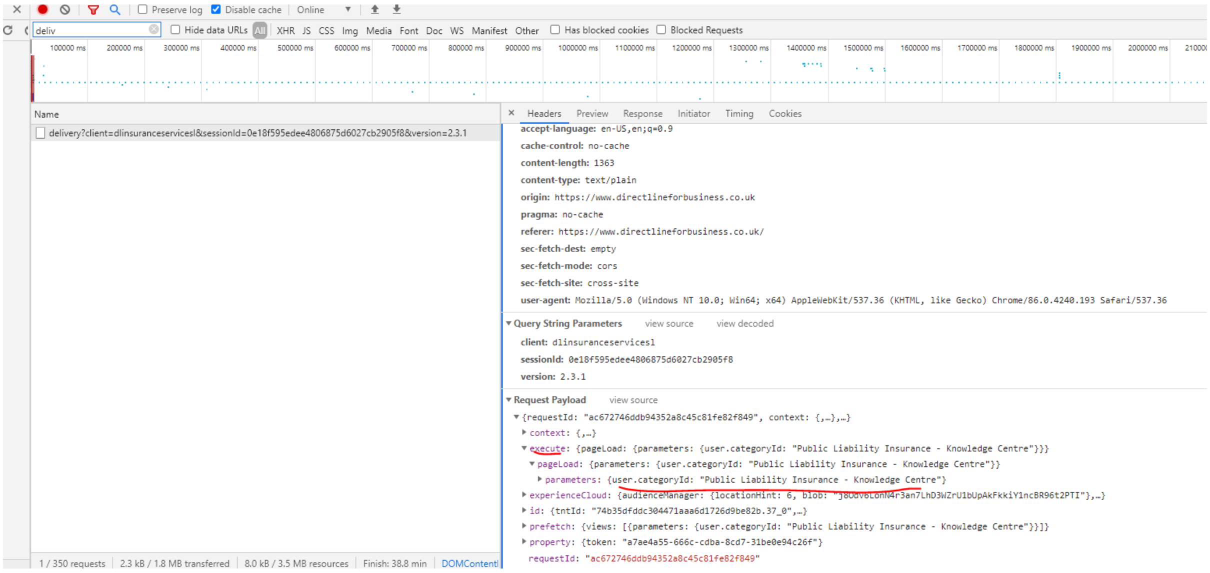
json?mbox=target-global-mbox&mboxSession=f071a47a1...pguXWp5olkAcUniQYPHaMWWgdJ3xzPWQm...

```
browserWidth: 1920
browserTimeOffset: 60
screenHeight: 1080
screenWidth: 1920
colorDepth: 24
devicePixelRatio: 1
screenOrientation: landscape
webGLRenderer: ANGLE (Intel(R) HD Graphics 630 Direct3D11 vs_5_0 ps_5_0)
user.categoryId:
profile.optOut: consent:true|ts:1617199704690
mboxMCSDID: 7671715CB38D43C1-37D5E1E0B6798FCE
vst.trk: tsbuk.d3.sc.omtrdc.net
vst.trks: tsbuk.d3.sc.omtrdc.net
mboxMCGVID: 51486862872600184040759586528468281918
mboxAAMB: RKhpRz8krg2tLO6pguXWp5olkAcUniQYPHaMWWgdJ3xzPWQmdj0y
mboxMCGLH: 6
```

1 / 142 requests | 1.5 kB / 1.4 MB transferred | 5.2 kB / 3.5 MB resources | Finish: 31.2 min | DOMContentL

At.js 2.x:

Go to the network tab > filter by “delivery” > click onto it > go to the headers tab > scroll down to “Request Payload” > locate the “execute” key and check the parameters passed:

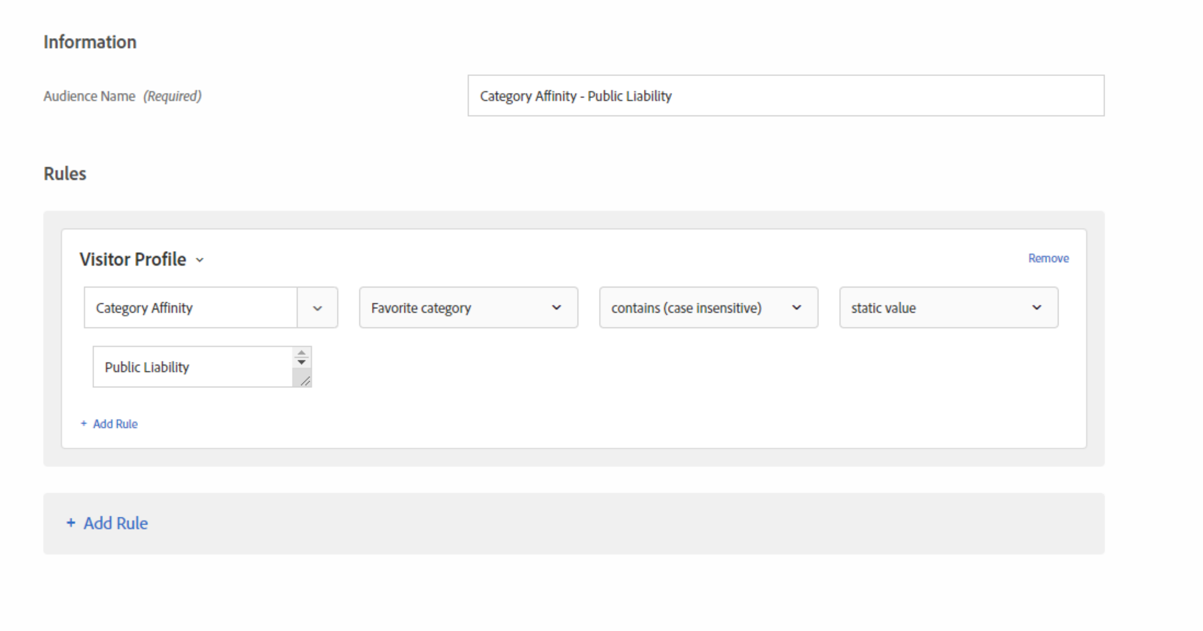


delivery?client=dlinsuranceservicesl&sessionId=0e18f595edee4806875d6027cb2905f8&version=2.3.1

```
accept-language: en-US,en;q=0.9
cache-control: no-cache
content-length: 1363
content-type: text/plain
origin: https://www.directlineforbusiness.co.uk
pragma: no-cache
referer: https://www.directlineforbusiness.co.uk/
sec-fetch-dest: empty
sec-fetch-mode: cors
sec-fetch-site: cross-site
user-agent: Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/86.0.4240.193 Safari/537.36
▼ Query String Parameters     view source     view decoded
client: dlinsuranceservicesl
sessionId: 0e18f595edee4806875d6027cb2905f8
version: 2.3.1
▼ Request Payload     view source
▼ {requestId: "ac672746ddb94352a8c45c81fe82f849", context: {,…},…}
  ▶ context: {,…}
  ▼ execute: {pageLoad: {parameters: {user.categoryId: "Public Liability Insurance - Knowledge Centre"}}}
    ▼ pageLoad: {parameters: {user.categoryId: "Public Liability Insurance - Knowledge Centre"}}
      ▶ parameters: {user.categoryId: "Public Liability Insurance - Knowledge Centre"}
  ▶ experienceCloud: {audienceManager: {locationHint: 6, blob: "j8Odv6LonN4r3an7LhD3WZrU1bUpAkFkkiY1ncBR96t2PTI"},…}
  ▶ id: {tntId: "74b35dfddc304471aaa6d1726d9be82b.37_0",…}
  ▶ prefetch: {views: [{parameters: {user.categoryId: "Public Liability Insurance - Knowledge Centre"}}]}
  ▶ property: {token: "a7ae4a55-666c-cdba-8cd7-31be0e94c26f"}
  requestId: "ac672746ddb94352a8c45c81fe82f849"
```

1 / 350 requests | 2.3 kB / 1.8 MB transferred | 8.0 kB / 3.5 MB resources | Finish: 38.8 min | DOMContentl

4. When you have confirmed the category is passed through correctly, you should create an audience in adobe target and run a blank experiment to check it has visitors. Example audience below:



Information

Audience Name *(Required)*: Category Affinity - Public Liability

Rules

Visitor Profile

Category Affinity | Favorite category | contains (case insensitive) | static value

Public Liability