bigfish

BF Admin Module Page Tagging.doc

Last Updated: 2-Jan-2014

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1   Modification History

Date	Who	Comments
23-May-12	Solveda	Initial
19-Jun-12	Solveda	Added validation
1-Aug-12	Solveda	Changed to use Helper and Warning tooltip
13-Apr-13	Solveda	Renamed doc from "Pixel Tracking" to "Page Tagging". Added two attributes to db entity: PIXEL_PAGE_POSITION: indicates if a tag is to be embedded in the <HEAD> or <BODY> section. PIXEL_SEQUENCE_NUM: defines a sequence for the page tags to appear in the generated HTML.
25-Oct-13	Solveda	Added new scope options SHOW_CART, CREATE_ACCOUNT_SUCCESS, SUBSCRIBE_NEWSLETTER_SUCCESS
28-Oct-13	Solveda	Added dynamic content variables
2-Jan-14	Solveda	Added concept for "SPECIFIC_URL" tagging

2 Processing Overview

2.1 Accessed From

- Module: Admin
- Nav-Bar: Admin
- Sub-Item: Page Tagging

2.2 Background

- There are many uses of the Page Tagging feature – it essentially allows clients to have certain HTML-like, Javascript or other functions embedded into various pages

- These are often referred to as "pixels", particularly in the Affiliate Marketing world

- Typical usage is:
  - Site Verification (for Pinterest and others)
  - Affiliate Marketing Retargeting

2.3 Affiliate Marketing Overview

- Also see http://wiki.affiliatewindow.com/index.php/Merchant_Tracking_Guide for a specific affiliate overview

- eCommerce Retailers often engage with Affiliate Marketing companies that offer advertising services

- These may be in the form of "banner ads" or other Internet marketing campaigns

- In order to gauge the success of specific marketing campaigns many affiliates use a technique generally known as "pixel tracking"

- At a high level here is how it works:

  - Affiliate Marketers purchase banner ads or other forms of Internet advertising on behalf of a retailer

  - Consumers that visit these pages may see the banner ad

  - As the banner ad is viewed, a discreet cookie is written containing information about the site where the banner ad was viewed

  - These cookies are written regardless of whether the consumer clicks to the Retailers URL at the time of viewing the banner ad

  - It's the fact that the consumer saw the banner ad that counts. The cookie will often be set to expire within a certain number of days

  - If the consumer visits the retailers eCommerce site then the intent is to give credit to the original banner ad

- A tracking pixel is placed on the confirmation page by the retailer

- Once the consumer reaches the confirmation page, the tracking pixel executes and reads the cookie from the consumer's machine

- Information read from the cookie is used to create a transaction in the tracking platform for reporting purposes – essentially giving credit to the original banner ad.

- Often a tracking pixel is generated on every page of a retailers eCommerce site, allowing the affiliate to track the movement of a consumer, and the effectiveness of a particular marketing campaign

2.4 <u>Requirements Overview</u>

- Site Verification:

  - Simple tags that are to be placed within the <HEAD> section of the site

  - For example, Pinterest:

```
<meta name="p:domain_verify" content="e184e788ec2640ce09e74f898e674075" />
```

- Affiliate Tracking:

  - Tags are normally placed within the <BODY> sections of the pages:

  - Most affiliates will require:

    - a simple non-parameterized pixel on each and every page except the Order Confirmation page (this can track basic consumer movement)

    - and a special pixel on the Order Confirmation page that contains some details of the transaction (so they can take credit for actual sales)

  - In some case Affiliates may require specific pixels in specific pages

  - This spec will provide flexibility for all affiliate tracking

3 Technical Notes

3.1 New OFBiz Entity

OFBiz Entity: XPIXEL_TRACKING				
Java Name	**DB Name**	**Field Type**	**Java Type**	**SQL Type**
pixel_id	PIXEL_ID	id-ne	String	VARCHAR(20)
pixel_scope	PIXEL_SCOPE	name	String	VARCHAR(250)
pixel_url	PIXEL_URL	Name	String	VARCHAR(250)
pixel_page_position	PIXEL_POSITION	name	String	VARCHAR(20)
pixel_sequence_num	PIXEL_SEQUENCE_NUM	numeric	Long	DECIMAL(20,0)
description	DESCRIPTION	desc	String	VARCHAR(250)
content_id	CONTENT_ID	id-ne	String	VARCHAR(20)
product_store_id	PRODUCT_STORE_ID	id-ne	String	VARCHAR(20)
fromDate	FROM_DATE	date-time	Timestamp	DATETIME
thruDate	THRU_DATE	date-time	Timestamp	DATETIME
createdDate	CREATED_DATE	date-time	Timestamp	DATETIME
createdByUserLogin	CREATED_BY_USER_LOGIN	id-vlong	String	VARCHAR(250)
lastModifiedDate	LAST_MODIFIED_DATE	date-time	Timestamp	DATETIME
lastModifiedByUserLogin	LAST_ MODIFIED_BY_USER_LOGIN	id-vlong	String	VARCHAR(250)
lastUpdatedStamp	LAST_UPDATED_STAMP	date-time	Timestamp	DATETIME
lastUpdatedTxStamp	LAST_UPDATED_TX_STAMP	date-time	Timestamp	DATETIME
createdStamp	CREATED_STAMP	date-time	Timestamp	DATETIME
createdTxStamp	CREATED_TX_STAMP	date-time	Timestamp	DATETIME

- CONTENT_ID is associated with the standard OFBiz Entity CONTENT

3.2 Pixel ID

- The unique identifier for the Pixel snippet

3.3 Pixel Scope

- The attribute Pixel-Scope will define which pages the pixel is to be included within
- Scope values are:

ALL	The tag script should be included within EVERY page in the implementation
ALL_EXCEPT_ORDER_CONFIRM	The tag script should be included within every page EXCEPT the Order Confirmation page
ORDER_CONFIRM	The tag script should be included within the Order Confirmation page ONLY
SHOW_CART	The tag script should be included within the Show Cart page ONLY

CREATE_ACCOUNT_SUCCESS	The tag script should be included AFTER a successful account creation. The workflow currently redirects to another page, typically the My-Account or Home-Page, after a successful account creation. Therefore, this tag will be implemented on the subsequent page, conditional on the requesting URL being the Create-Account page. NOTE: this is intended to be used for the stand alone "New Account" page and not the account creation at Checkout. If a session variable (see implementation notes below) makes this distinction then that would work well – since we could use the "create-acct-in-checkout" value for a future page tag.
SUBSCRIBE_NEWSLETTER_SUCCESS	The tag script should be included AFTER a successful newsletter subscription. The workflow currently redirects to the Confirmation Page after a successful Subscription. Therefore, this tag will be implemented on the Confirmation Page, conditional on the requesting URL being the Subscribe to Newsletter page.
SPECIFIC_URL	The tag script will be included for this specific URL

- CREATE_ACCOUNT_SUCCESS and SUBSCRIBE_NEWSLETTER_SUCCESS
    - For the scope CREATE_ACCOUNT_SUCCESS and SUBSCRIBE_NEWSLETTER_SUCCESS the tags are being fired on a "subsequent" page
    - The specific identification of that "subsequent" page may not be known
    - A Session variable will be required to indicate that one of the underlying actions has taken place (e.g. account created)
        - Then the Page Tagging code can determine which Pixel "scope" to include on the subsequent page

3.4 Pixel URL

- Only relevant for a Scope of "SPECIFIC_URL"
- This will determine the URL that should include the specific tag

- Example:

    - A client is paying for a display banner campaign that is driving traffic to a specific product category page:

        www.someclient.com/online/shop/necklaces

    - The client wants to include a page tag for that specific URL in order to gauge the success of the banner ad campaign:

        Pixel Scope: SPECIFIC_URL
        URL: www.someclient.com/online/shop/necklaces
        Page Tag: Necklace Campaign Tagging Code

    - The tag "Necklace Campaign Tag Code" will be included on the specific page

3.5 Pixel Page Position

■ Valid values are:

HEAD_START	tags will appear immediately after the "http-equiv" tag within the <HEAD> tag.
HEAD_END	tags will appear immediately before the </HEAD> tag
BODY_START	tags will appear immediately after the <BODY> tag
BODY_END	tags will appear immediately before the </BODY> tag

■ Examples:

    o   HEAD_START

```
<head>
<meta http-equiv="content-type">
<PAGE TAG GOES HERE>
       <title> tags
<meta> tags
</head>
```

    o   HEAD_END

```
<head>
       <title> tags
<meta> tags
<PAGE TAG GOES HERE>
</head>
```

    o   BODY_START:

```
<body>
       <PAGE TAG GOES HERE>
       BigFish <DIV> tags
       Javascript functions
Application HTML
</body>
```

    o   BODY_END

```
<body>
       BigFish <DIV> tags
       Javascript functions
Application HTML
<PAGE TAG GOES HERE>
</body>
```

3.6 Pixel Sequence Num

■ This allows multiple page tags to be sequenced within the generated page

3.7 Content ID

- ■ The actual Pixel Code will be stored as standard OFBiz "content"
- ■ This will allow for all content features, such as variable substitution, to be utilized
- ■ The Pixel Code is the actual script that will be included in the page

3.8 Product Store ID

- ■ For eCommerce, the "current" product store will be used to retrieve Pixel content
- ■ In the Admin Module the "current" product store will be used

3.9 Pixel Code Dynamic Content

- ■ The Pixel Code will need to allow for dynamic variable substitution so that variables such as the Order Details can be included in the script

- ■ Example:

Customer:	John B Smith
Order#:	WS100099
Order Date:	1/1/2014

Product	Qty	Price	Offer Price	Total
ABC-123	2	$10.00	$10.00	$20.00
XYZ-987	3	$30.00	$20.00	$60.00

Item Total:	$80.00
Shipping Method:	UPS
Promotion (TENOFF):	($8.00)
Loyalty Point Redemption:	($10.00)
Shipping:	$5.00
Tax (10%):	$6.20
Total:	$73.20

- ■ Available parameters:

Parameter	Description	Value from Example
ORDER VARIABLES		
ORDER	The customer Order Header record	⌐
ORDER_ID	The Order ID	WS100099
ORDER_DATE	The date of the order	1/1/2014
ORDER_ITEMS	The order items	Item List
ORDER_ITEMS_QTY	The total number of items 'quantity' of the	5

	Order	
ORDER_ITEMS_MONEY	The cart sub total	$80.00
ORDER_TOTAL_PROMO	Sum of adjustments (promotions, loyalty etc)	($18.00)
ORDER_TOTAL_SHIP	Sum of shipping charges	$5.00
ORDER_TOTAL_TAX	Sum of taxes	$6.20
ORDER_TOTAL_NET	The final amount charged to the customer	$73.20
CART VARIABLES		
CART	The customer shopping cart	⊐
CART_SIZE	The total number of items in the shopping cart	2
CART_ITEMS	The Shopping cart items	Item List
CART_ITEMS_QTY	The total number of items 'quantity' in the shopping cart	5
CART_ITEMS_MONEY	The total number of items 'money amount (Sub Total)	$80.00
CART_TOTAL_PROMO	The Shopping Cart total discount from coupon or promo	($18.00)
CART_TOTAL_SHIP	The Shopping Cart total Shipping amount	$5.00
CART_TOTAL_TAX	The Shopping Cart total Tax amount	$6.20
CART_TOTAL_NET	The Shopping Cart Total amount	$73.20
USER LOGIN VARIABLES		
USER_LOGIN	The customer User Login object	⊐
USER_LOGIN_ID	The customer Login Id	jsmith@gmail.com
FIRST_NAME	The customer first name	John
LAST_NAME	The customer last name	Smith
MIDDLE_NAME	The customer middle name	B

⊐
* All system parameters are also available

3.10 <u>Technical Notes</u>

- Some clients may choose to further define details of the Order ITEM. For now this does not need to be supported.

- The design is using standard OFBiz "content" classes so variable substitution needs to be supported. E.g. ${ORDER_ID}

4   Implementation Example

4.1   Introduction

- As an example, review the Moda implementation, using a marketing company Affiliate Window

- Resources:
    - see http://wiki.affiliatewindow.com/index.php/Merchant_Tracking_Guide
    - VSS: clients / moda / bf-website / docs / Affiliate Window

4.2   Pixel Definitions

- For all pages, except the Order Confirmation page:

    - Definition:

    ```
    <script src="https://www.dwin1.com/someMerchant.js"
            type="text/javascript"
            defer="defer">
    </script>
    ```

    - Would be rendered as:

    ```
    <script src="https://www.dwin1.com/someMerchant.js"
            type="text/javascript"
            defer="defer">
    </script>
    ```

- For the Order Confirmation page:

    - Definition:

    ```
    <script type="text/javascript">
      //<![CDATA[
            /*** Do not change ***/
            var AWIN = {};
            AWIN.Tracking = {};
            AWIN.Tracking.Sale = {};

            /*** Set your transaction parameters ***/
            AWIN.Tracking.Sale.amount = '%ORDER_TOTAL_ITEM%';
            AWIN.Tracking.Sale.currency = 'GBP';
            AWIN.Tracking.Sale.orderRef = '%ORDER_ID%';
            AWIN.Tracking.Sale.parts = 'DEFAULT:%ORDER_TOTAL_ITEM%';
            AWIN.Tracking.Sale.voucher = '';
            AWIN.Tracking.Sale.test = '0';
      //]]>
    </script>
    ```

    - Would be rendered as:

```html
<script type="text/javascript">
  //<![CDATA[
        /*** Do not change ***/
        var AWIN = {};
        AWIN.Tracking = {};
        AWIN.Tracking.Sale = {};

        /*** Set your transaction parameters ***/
        AWIN.Tracking.Sale.amount = '100.00';
        AWIN.Tracking.Sale.currency = 'GBP';
        AWIN.Tracking.Sale.orderRef = '123456';
        AWIN.Tracking.Sale.parts = 'DEFAULT:100.00';
        AWIN.Tracking.Sale.voucher = '';
        AWIN.Tracking.Sale.test = '0';
  //]]>
</script>
```

5   Page Tag Definitions

page tagging list

ID	Scope	Page Position	Seq #	Description	Status
Page Tagging List					
AW_GENERAL	ALL_EXCEPT_ORDER_CONFIRM	BODY_END	10	Affiliate Window Pixel Tracking. Definition for all pages except the Order Confirmation.	Active
AW_CONFIRM	ORDER_CONFIRM	BODY_END	20	Affiliate Window Pixel Tracking. Definition specifically for the Order Confirmation page.	Active
BIG_MKT_CO	ALL	BODY_END	30	Big Marketing Company Affiliate. Special pixel tracking for all pages.	Active
CART_TAG	SHOW_CART	HEAD_TOP	10	Floodlight doubleclick tag for Show Cart tracking	Active

Back	Add

5.1   Detail Screen

page tagging detail

Page Tagging Detail: AW_CONFIRM

ID:	AW_CONFIRM
Scope:	ORDER_CONFIRM [drop-down]
URL:	
Page Position:	BODY_END [drop-down]
Seq#:	10
Description:	This page describes the Privacy Policy for GMH.COM. It defines all conditions. A link in the footer area will offer access to this policy from every page. * 255 character limit (n characters left)

Tagging Code:	
	```<script type="text/javascript">```
	``` //<![CDATA[```
	``` /*** Do not change ***/```
	``` var AWIN = {};```
	``` AWIN.Tracking = {};```
	``` AWIN.Tracking.Sale = {};```
	``` /*** Set your transaction parameters ***/```
	``` AWIN.Tracking.Sale.amount = '%ORDER_TOTAL_ITEM%';```
	``` AWIN.Tracking.Sale.currency = 'GBP';```

```
                AWIN.Tracking.Sale.orderRef = '%ORDER_ID%';
                AWIN.Tracking.Sale.parts = 'DEFAULT:%ORDER_TOTAL_ITEM%';
                AWIN.Tracking.Sale.voucher = '';
                AWIN.Tracking.Sale.test = '0';
        //]]>
    </script>
```

Created Date: 07/27/11 at 9:00am

Status: Active   [Set to Inactive]

Active Date: 08/01/2011 at 3:00pm

[**Back**]   [**Save**]   [**Delete**]

- ■ The Pixel ID is display-only in Edit mode

- ■ The URL attribute is only enabled if the scope if "SPECIFIC_URL"

- ■ Characters left countdown
    - ○ Description is limited to 255 characters

- ■ Validation
    - ○ Pixel ID:
        - ▪ "The ID cannot be blank"
    - ○ Scope:
        - ▪ "Page Tagging Scope must be selected"
    - ○ Page Position
        - ▪ "Page Position must be selected"
    - ○ Seq#
        - ▪ Seq# must be numeric and between 1 and 1000
    - ○ Description:
        - ▪ "Description cannot be blank"
    - ○ Pixel Code:
        - ▪ "Page Tagging Code cannot be blank"

- ■ Delete:
    - ○ Need to confirm the delete action (see spec BF-Admin-Module-General)
        - ○ Title: Please Confirm Delete
        - ○ Text: Are you sure you want to delete tag PX_xxxxx ?
        - ○ Button1:   Yes
        - ○ Button2:   No

- ■ Warning Text
    - ▪ "You will need to reset cache in Admin/Tools for your changes to take effect"