Channel Grouping User Guide

Overview

The Channel Grouping dashboard enables users to create, edit, and delete channel rules that generate the predictive attribution report in the Tomi.ai application. The predictive attribution report provides campaign activity across all channels within a selected date range. UTM parameters are used to facilitate data collection with our unique tracking pixel, Tomi.aiPixel. The Tomi.aiPixel obtains UTM parameters for each website visit and allocates them to the appropriate channel name based on channel grouping configurations. For this reason, channel grouping configurations are an essential part of building predictive attribution reports.

Benefits of Customization

With Channel Grouping management, users can tweak rule conditions and execution order, adjust channel priority levels, separate channels, and fix mismatches when they occur. Oftentimes, marketers will need to follow up on one or all of these actions to improve the quality of data displayed in their reports.

Getting Started

The Channel Grouping dashboard comes loaded with presets for the most commonly used marketing channels. Rules and conditions are set for each preset and can be edited or deleted at your discretion.

Only users with Admin and Editor designations can make changes to the dashboard. If you need to make changes but don't have edit access, reach out to your customer support manager for assistance.

How to Access the Channel Grouping Dashboard

After logging into the Tomi.ai app, select **Integration > Channel Grouping** in the left-hand navigation menu to access the dashboard.

Dashboard Components

The Channel Grouping dashboard contains a **Search** bar, **Create rule** button, and **Rematch** button at the top of the page, and a large table in the center of the page. Each marketing channel's rule has a designated row in the table.

Four header columns are present in the Channel Grouping table:

- **Priority:** The **Priority** column lists priority levels for each channel's rule (read channel prioritization to learn more).

- **Channel Name:** The **Channel Name** represents the selected name of a marketing channel. Any channel name that is saved and rematched on the dashboard populates in the Predictive Attribution report.
- **Condition:** The **Condition** column provides rule conditions to be applied during rematching.

	Priority	Channel name	Condition
⋮	1	Paid Google	(**utm_campaign** *contains* google **and** cpc) **or** (**utm_source** *contains* google **and** **utm_medium** *contains* cpc)
⋮	2	Paid Bing	(**utm_campaign** *contains* bing **and** cpc) **or** (**utm_source** *contains* bing **and** **utm_medium** *contains* cpc)
⋮	3	Type-In	(**utm_source** *equals* (direct) **and** **utm_medium** *equals* (none)) **or** (**referrer** *contains* ebaconline.com.br **and** **utm_medium** *is null* **and** **utm_source** *is null* **and** **utm_campaign** *is null*)

Stage Tags

The **Stage** column, located to the far right of the page, identifies the state of a given rule. Four stage tags are provided in the Channel Grouping table:

new	The new tag means the rule has been created but not applied. To apply the new rule, click the **Rematch** button
deleted	The deleted tag indicates that the rule will be deleted after rematching. To update the channel grouping based on the deleted rule, click the **Rematch** button.
changed	The changed tag indicates that a change with the rule has been saved but not rematched. It only appears when a rematching process is currently in session. To update the channel grouping based on the changed rule, click the **Rematch** button.
applied	The applied tag means that the rule has been applied to the marketing channel and will be used to generate the Predictive Attribution report.

Creating Rules

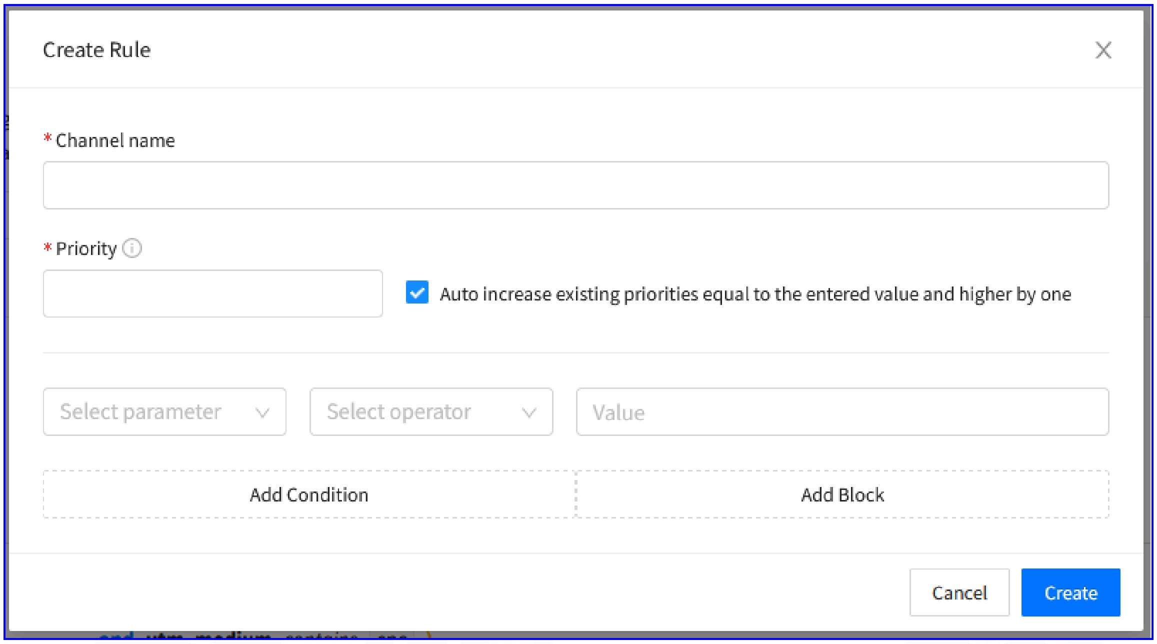
The **Create rule** button allows you to create rules for both new and existing channels. When a new rule is created, the user must identify a **Channel Name**. Names of existing channels can also be entered and will appear in the dashboard at the priority level indicated by the user.

Priority levels must be identified when creating or editing a rule. The number entered represents the rule's priority among other rules listed in the dashboard.

How to Create a Rule

To create a rule:

1. Select the **Create rule** button Create rule next to the search bar at the top of the dashboard. This opens the **Create Rule** window.
2. Enter a name in the **Channel name** field and a number in the **Priority** field.
3. From the **Select parameter** drop-down menu, choose one of four parameters.
4. Next, choose an operator from the **Select operator** drop-down menu and enter a **Value.**
5. To add an **And/Or** condition, click the **Add Condition** button. Conditions determine how visits are grouped into channels.
6. To combine conditions into groups click the **Add block** button.
7. Next, click **Create** to create your new channel and rule.
8. The rule you created will not be applied until you click the **Rematch** button at the top of the dashboard.

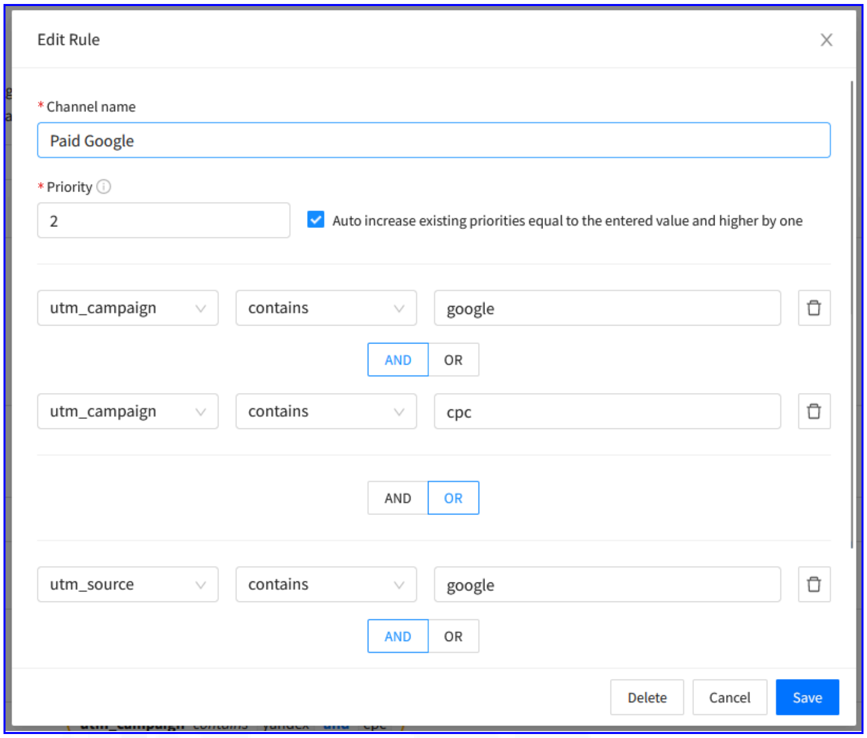


Editing Rules

You can edit rules using the Edit button located to the right of the **Condition** column in the Channel Grouping dashboard.

To edit a rule:

1. Navigate to the rule you want to change on the dashboard. A channel can have multiple rules associated with it at different priority levels. Check the condition (s) to ensure that you've selected the right rule.
2. Select the Edit button to open the **Edit Rule** window.
3. Make changes to the **Channel name, Priority** level, or conditions and click **Save**.
4. Changes are not applied until you click the **Rematch** button at the top of the dashboard.



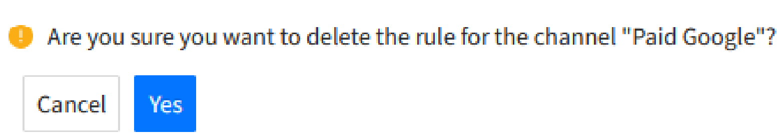
Deleting Rules

You can delete a rule in the dashboard by selecting the Delete button located in the rightmost column of the dashboard. When you delete a rule, the rule stage changes to deleted.

The **deleted** stage indicates that the rule will be deleted after rematching. To delete the rule forever, click the **Rematch** button. If you delete a rule but forget to perform a new rematch, the rule will continue to populate in the Predictive Attribution report.

To delete a rule:

1. Navigate to the rule that you would like to delete.
2. Select the Delete button and confirm the deletion by clicking the **Yes** button in the pop-up modal.



3. Click the **Rematch** button at the top of the dashboard to permanently delete the rule.

Channel Prioritization

Each rule is given a **Priority**. Priority levels are adjustable and can be changed using the drag-and-drop functionality.

If a visit matches the conditions of several rules, it's matched with the channel whose grouping rule has the highest priority. You can create multiple visit grouping rules for one channel. In this case, the grouping rules work according to the **AND** operator.

To change a rule's priority:

1. Activate the hand icon by hovering over the rule on the dashboard.
2. Drag and drop the rule at your desired priority level.

You can also set priority levels in the **Create Rule** and **Edit Rule** windows. Priority levels must be indicated when creating and editing rules. The number that you enter represents the new rule's priority amongst the other rules listed in the dashboard.

Rematching

The **Rematch** button located at the top of the dashboard is used to apply changes and configure new channels in the Predictive Attribution report. Rematching acts as a final step for all activities conducted in the Channel Grouping section of the dashboard. Edits, creations, and deletions are applied once the rematching process is complete. Rematching typically takes 10 minutes, but processing times may vary. The **applied** tag in the **Stage** column of the dashboard confirms that the rematching of a rule was successful.

Workflow Example

The following is a common use case for the rematching process:

1. After making changes to a selection of rules, the user clicks **Rematch** to start the rematching process.
2. While waiting for the process to complete, the user decides to make more changes.
3. The changes made are saved in various states depending on the action performed. For example, one rule may have a **new** tag, while others may have the **changed** or **deleted** tags attached to them.
4. The changes made while waiting for the first rematch to complete will not be applied until a second rematch is conducted.

5. In order to apply the new changes, the user must wait for the first rematching process to finish. After the first rematch is complete, the user can click the **Rematch** button again to start the rematching process.

Use Case: Performance Marketers

Performance marketers working with special channels like programmatic marketing or CPA networks can use the dashboard to perform certain tasks. For example, the dashboard can be used to manually separate channels when necessary.

How to Manually Separate Channels

To manually separate channels:

1. Identify a unique channel that needs to be separated.
2. Think about possible names for the new channel (s) that will be created to facilitate the separation. Ensure the names accurately describe the traffic source.
3. Start separating by creating a rule for every channel. Set the **Conditions** for each.
4. Next, **Edit** the unique channel's rule that was separated. Change conditions and possibly the name to accommodate the new channel or channels that have been added.
5. Apply changes by clicking the **Rematch** button at the top of the page.

Recap

The Channel Grouping dashboard is an effective tool for altering channel grouping rules and priority levels. Users may also benefit from the simplicity of separating channels when individual channel analyses are warranted.

To recap, the following actions can be performed in the dashboard:

- Edit and delete rules
- Create new channels and rules
- Change rule conditions
- Rematch changes to be reflected in the predictive attribution report

Get started in the dashboard by reviewing your current marketing channels and identifying a plan of action to help you achieve your desired results.