

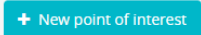
Analyze

The Analyze section of the Web engagement platform is where you define rules/opportunities and criteria for it to be triggered. An opportunity is a piece of logic that describes a unique scenario and prompts for an action. For example : if a visitor was filling up a loan application and abandons it half way to navigate to another page, you can proactively offer help to complete it. You can also use the AND and OR operators to build a more complicated scenario by combining many conditions.

Each opportunity is then associated with a solution/action to be taken in the event of the opportunity being triggered. You can offer one or more solutions for each opportunity, prioritising them according to the order in which they must occur.

Opportunity requires a Point Of Interest or special measure points that can be referenced in the opportunity while defining the criteria. These can be a specific URL, or a URL pattern, an element on the page or something that matches when a script is executed.

Creating a Point of interest

To create a Point of interest go to Analyze -> Points of Interest. Click on  icon and specify a name. From the drop down menu, choose the relevant point of interest and click **Save**.

New point of interest

Name

First POI

Type of point of interest

HTML

HTML

JavaScript

URL Match

URL Pattern match

Purchase confirmation

You will then be taken to the Edit point of interest screen to add more details. You can enter the description and click **Save**.

Edit point of interest: First POI

Name
First POI


Description
This is the first Point of Interest

Type
html

Value
2

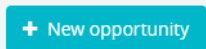
Tags
+

Save Cancel Delete

Click on the  icon on the top of the page to take you back to the list of point of interests for your site.

Creating Opportunities

Opportunities can be set up to act on certain actions a visitor performs on the website. For example: loading contact form, errors during checkout, filling application form and so on. All opportunities are evaluated on every page load. However, it is possible to re-evaluate an opportunity without a page load to see if a banner should be activated.

To create an opportunity, go to Analyze -> Opportunities and click on the  icon. Enter the name of the Opportunity and click **Save**. You will be able to edit the opportunity to include rules and associate a solution to it. Add a description to the opportunity and define condition/conditions for it.

Edit opportunity: Test

Name
Test

Description
This is a trial opportunity

Score
2

| | | | | |
|-----------------|-------------------|----------------|-----------|-------------------------------------|
| Operator | Point of interest | Criteria | Operator | Value |
| | Navigation | History Page 1 | Equal | https://mydemo.com/loan application |
| And | Navigation | Current Page | Not equal | https://mydemo.com/loan application |
| + Add condition | | | | |

X

Selecting solutions for opportunities

After you have defined the condition, you need to specify which solution/s need to be presented when the condition is met. If there are more than one solution, you can prioritise them by hovering over the list of solutions and pressing the up and down arrow to move it up or down the list. **Read the article on creating solutions for more details.**

Select which solutions to activate with this opportunity

Available

Proaktiv rule

Puzzel delivery

Puzzel test

Sonos Controller

Spiros - Test

Spiros solution

Systembolaget vita viner

Tabbanner Default

Take over from product page MSI Wind

«

»


Selected

Dooreye Callback

test solution

Set priority of solutions

| Priority | Name |
|----------|------------------|
| 1 | Dooreye Callback |
| 2 | test solution |

Click on the **Save** button and press  icon at the top of the page to see the list of opportunities for the site. You can also search for an opportunity by entering the name in the search tab.