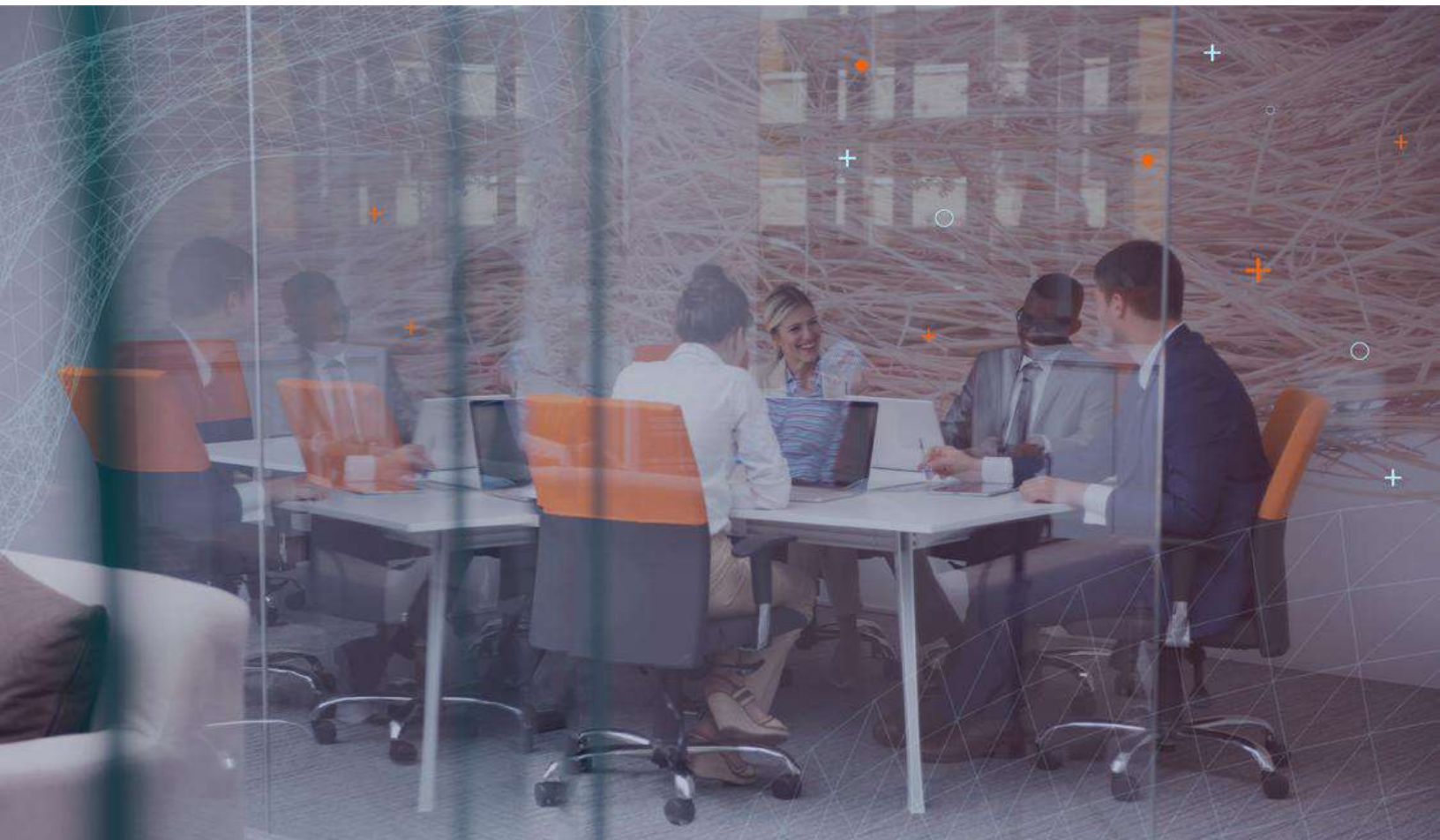


OB Code Reference Guide

Outbrain

Updated as of 10/20/2020

OB Code for Rule Automation



We are excited to announce the launch of OB Code - a new feature that automates campaign and account level rules that YOU define!

Please read through this guide to understand this feature and how it works. Also feel free to reach out to your dedicated Account Manager with any questions.

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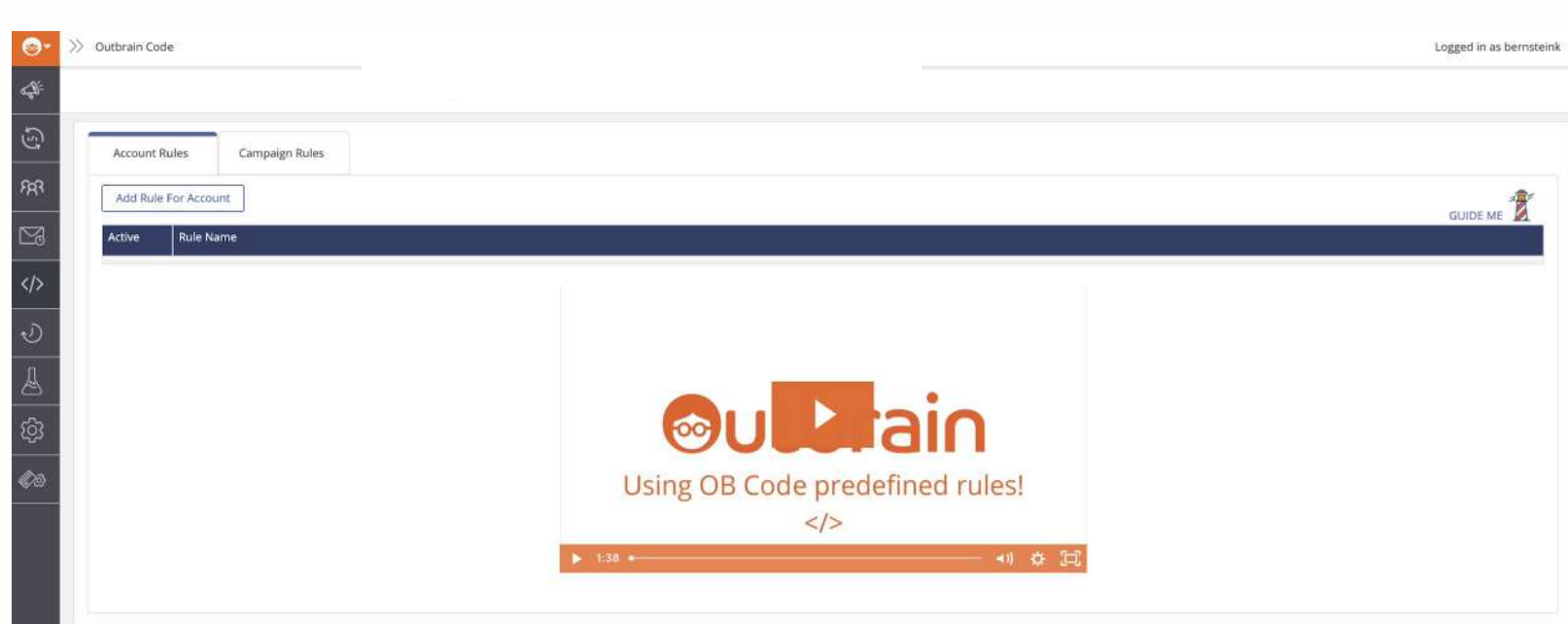
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Section I: What is OB Code?

OB Code is a feature within the Dashboard that allows marketers to set automated rules on their campaigns and/or accounts that will either make the specified change when a condition is met or provide an alert to their email.

The primary goal is to automate changes that would otherwise be made manually by a marketer and make the optimization process easier and more efficient. The feature also allows for push notifications of important events that a marketer would normally be checking for during the course of their day.

You can access OB Code directly in your Dashboard (<https://my.outbrain.com>) by clicking on the **lab flask** icon on the left-hand navigation bar.



Outbrain Code

Logged in as bernsteink

Account Rules Campaign Rules

Add Rule For Account

Active	Rule Name
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GUIDE ME

Using OB Code predefined rules!

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1:38

Section II: What Can I do with OB Code?

You can do a variety of things with OB Code. They generally fall into 2 buckets: (1) Optimizations and (2) Notifications.

Optimizations are changes that you need to make to your campaigns/accounts in order to improve performance. The optimizations that are possible are the following:

- Lowering/Raising Bids
- Removing sources
- Pausing ads

Notifications are alerts that are sent to you via email and/or Slack when specific events (that you've defined) have occurred. Examples of notifications are as follows:

- A campaign has capped for the day
- A campaign is underpacing
- A CBS experiment (A/B test) has a winner
- An optimization has been made by OB Code

OB Code can make changes on an account/advertiser level or on an individual campaign level.

Also, please note that notifications can also be set on optimizations in the case where a marketer wants to be alerted once a change has been made.

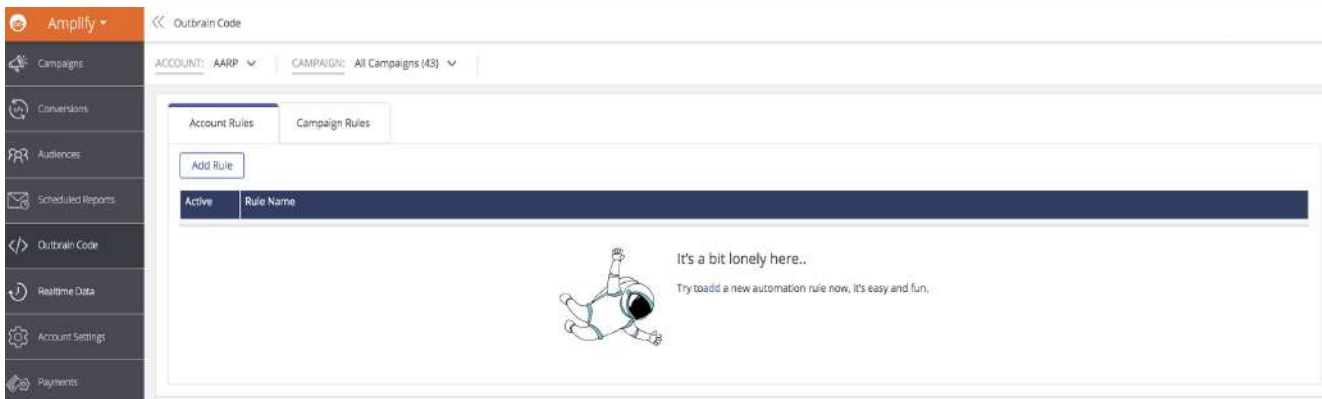
Section III: Show Me How It Works!

This section will show you how OB Code works on a high level. For more details, please read on past this section.

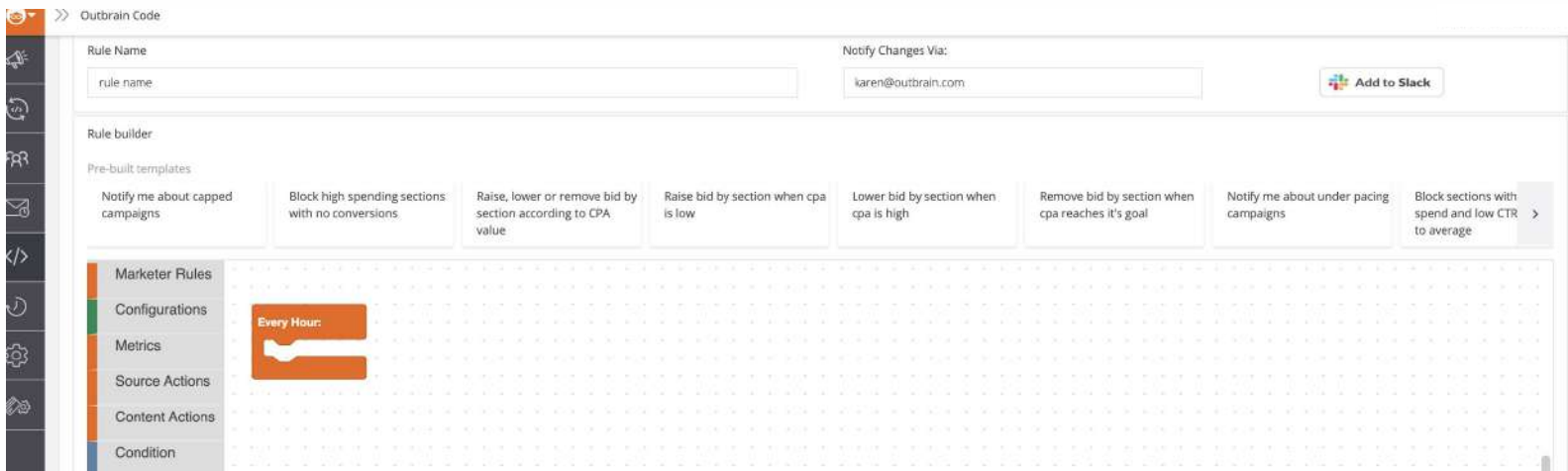
1. Decide whether you want to create an **Account Level** rule or a **Campaign Level** rule.

When you set up an Account Level rule, the rule will activate across ALL campaigns under that account.

If you want to set up a campaign level rule, please note that you can only select 1 campaign at a time and can't select multiple campaigns.



2. Click “Add Rule” in either the ‘Account Rules’ tab or the ‘Campaign Rules’ tab.
3. Once you click “Add Rule”, you are taken to the “Rule Builder” where you will define your rules



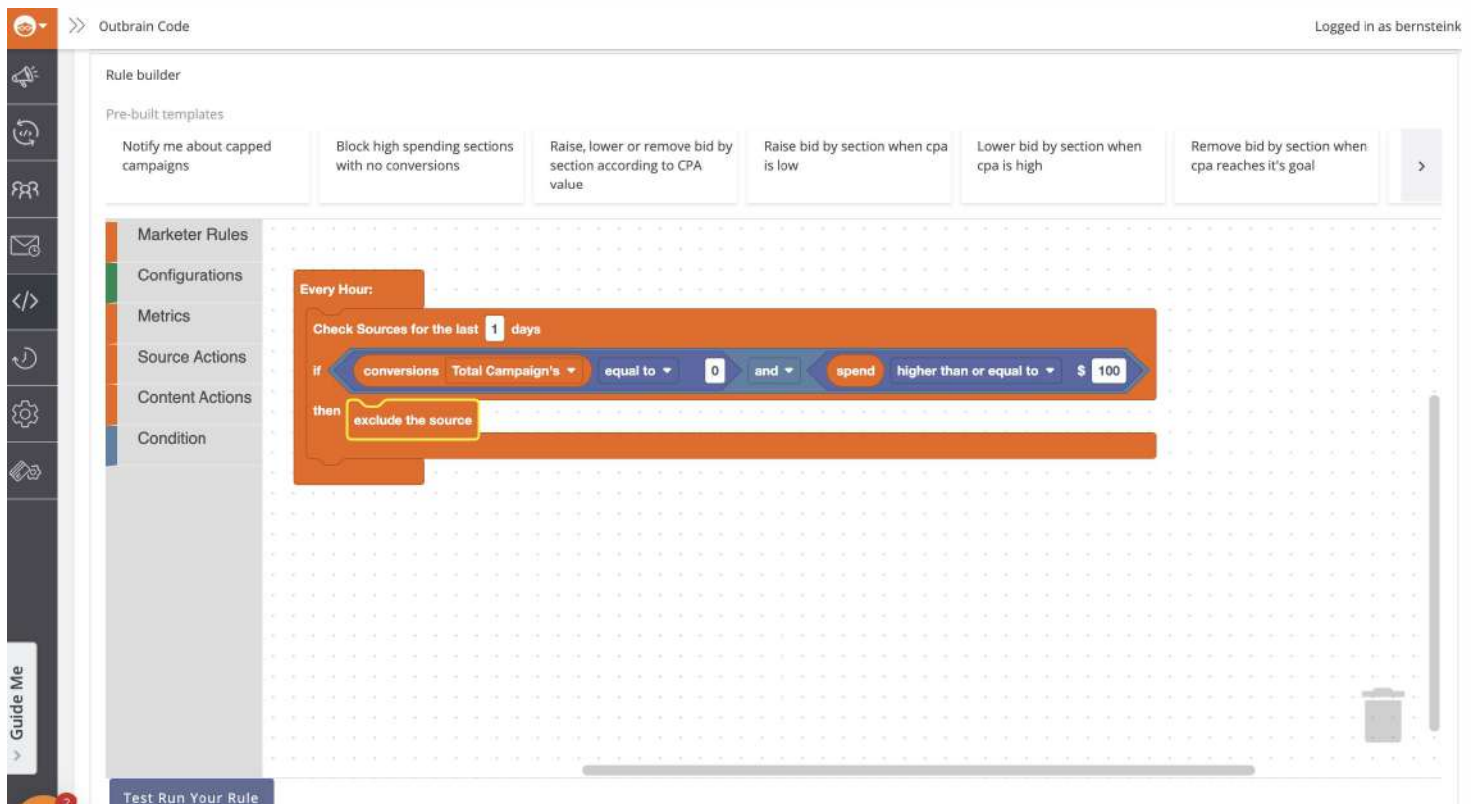
4. Create a Rule Name and input it into the appropriate field. This rule should describe what the rule does (so it is easily identifiable and will be easy for you to modify it when necessary).

5. You can also be notified of rule changes by entering emails into the email field under ‘Notify Changes Via:’. If you have multiple email addresses, you can enter all of them separated by commas. You can also be alerted via Slack by clicking on the “Add to Slack” button.

6. Predefined rules are listed under “Rule Builder”. Once you click on one of these rules, the template will appear on the canvas section of the page. All you need to do is modify the parameters to satisfy your custom thresholds regarding impressions, clicks, CTR, conversions, or CPA.

7. If you decide to use one of the predefined rules, make sure to remove the snippet ‘Every Hour’ as this is specifically meant for building your own rule. In order to remove it, you just need to click on the snippet and click ‘Delete’ or drag it to the Trash bin on the lower right hand corner.

8. In order to learn about all the Predefined rules, go to Section IV of this guide for an explanation of each one.
9. In order to learn how to create your own rules, please click to Section V of this guide for a detailed walk through of how to do this.
10. Test run your rule - this will show you a sampling of anything that might change upon activation of the rule.



11. Run Forever - this will commit your rule and activate it to run.
12. Every hour, the code will be run and changes/notifications will be made accordingly.
13. Notifications will be made only once per day.

Rule: “Block sections with high spend and low conversion rate (CVR)”

This rule blocks source sections that are above a spend threshold and have a CVR lower than a specific percentage.

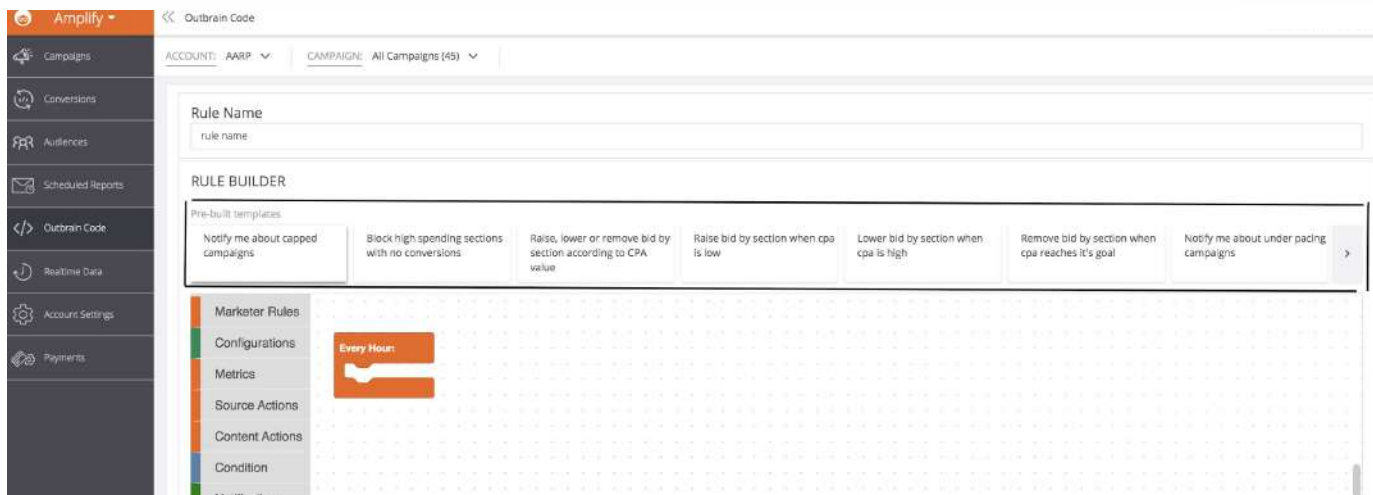


Section IV: Predefined Rules

Predefined rules are the most frequently created rules. Think of these as a shortcut. Please note that new rules will likely be created in the future based on feedback.

Starting out with predefined rules is a great way to start exploring OB Code.

You can find predefined rules at the top of your canvas (see rectangle below).



TIP: If you find yourself creating the same rule over and over, please let your Account Manager know and Outbrain will consider it for a new predefined template in the future.

Notifications:

Rule: “Notify me about capped campaigns”

This will send out a notification via email to you when any of your campaigns have capped. Please make sure you fill out your email address next to the Rule Name.

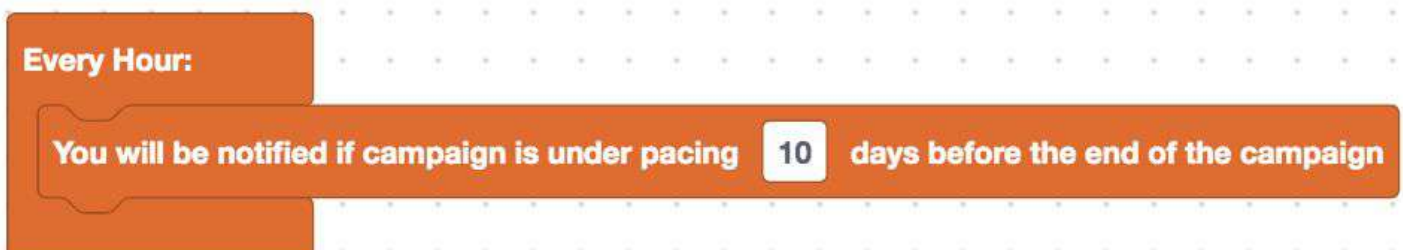
Next Step: *You can shift unspent budget to the capped campaign to allow for more spending or you can add more budget if performance is strong.*



Rule: “Notify me about underpacing campaigns”

This will notify you if your campaign is at risk to not spend the campaign budget 10 days prior to the end date on the campaign.

Next Step: *You can add more content or raise the CPC on your campaign if possible. This is also an opportunity to check targeting on the campaign to make sure it is not too restrictive.*



Rule: “Notify me when a running CBS experiment has a winner”

You will receive a notification when there is high confidence that there is a winner on the CBS experiment.

Next Step: *Remove the poorer performing variable to allow the campaign to run on the favorable variable.*



Optimizations:

Rule: “Block high spending sections with no conversions”

This rule blocks high spending sections that have no conversions. Please define the total spend you want to use as your threshold for the rule to affect the section. You can also modify the number of days as needed.



Rule: “Raise bid by section when CPA is low”

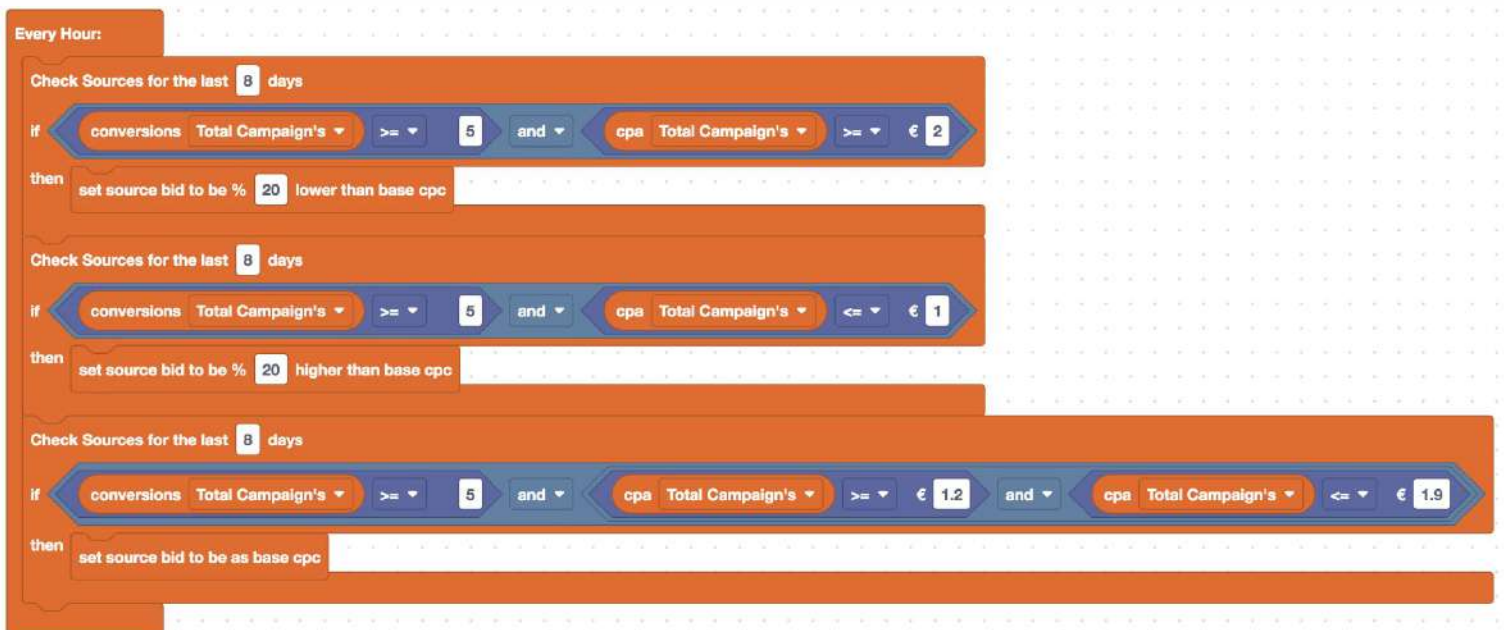
This rule will raise your bid on a section higher (based on a percentage you define) if your CPA is low and there is a specific threshold of conversions defined.



Rule: “Raise, lower, or remove bid by section according to CPA value”

This rule will adjust your bid based on your CPA performance. You should define a threshold on conversions and input the desired CPA. You can also adjust the percentage increase/decrease of the bid.

The last part of the rule will remove any manual bid adjustments and revert back to the base CPC if it falls into the desired CPA range.



Rule: “Lower bid by section when CPA is high”

This rule will lower your bid on a section higher (based on a percentage you define) if your CPA is low and there is a specific threshold of conversions defined.



Rule: “Remove bid by section when CPA reaches its goal”

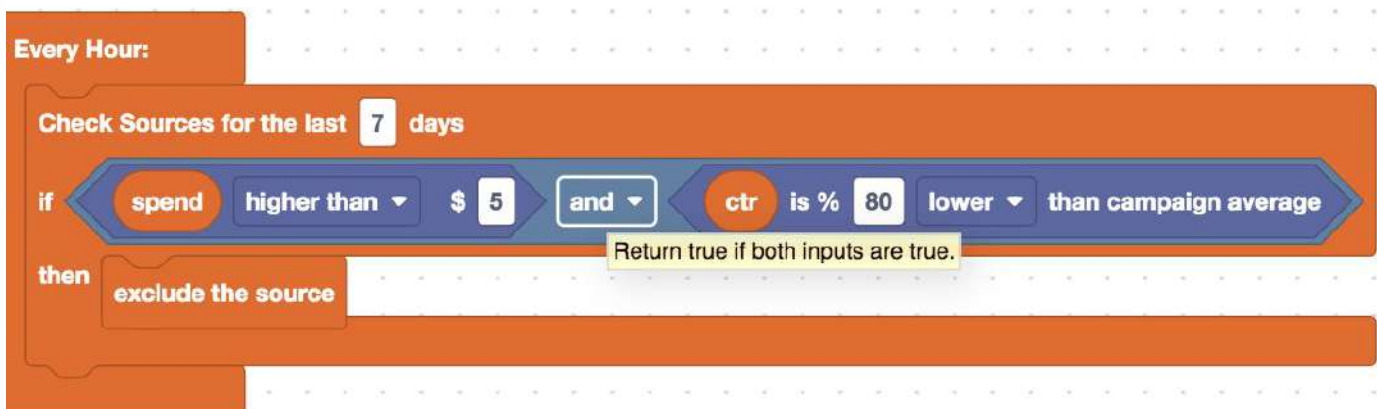
This rule removes manual source bids and sets them back to the base CPC when the CPA is optimal.



Rule: “Block sections with high spend and low CTR compared to average”

This rule will block source sections that have a spend above a defined threshold and have a CTR that is a specific percentage lower than the campaign’s CTR average.

This is useful for campaigns that are looking to drive traffic as a goal.



Section V: Building Your Own Rules

If none of the predefined rules meet your needs, you are free to build them in OB Code on your own!

Just make sure to first select whether you want to create an Account level rule or a Campaign level rule and then name your rule so you understand what it is for. This will be helpful if you decide you want to disable it or modify it at a later point.

In this section, you will learn about all the different parts that make up an OB Code rule.

It's also important to note that the left hand navigation (starting with 'Marketer Rules') dictates the order in which a rule needs to be built. Think of these as the steps you need to follow (but some of the steps are optional).

1. Marketer Rules

When you build your own rule, you always start with Marketer Rules. The base block will be “Every hour” (this is on the canvas by default) since OB Code runs every hour.

As mentioned before, you can choose a ‘notification’ (underpacing, capping, CBS winner, OB Code change has been made) or an ‘optimization’ (sources or content/ads).

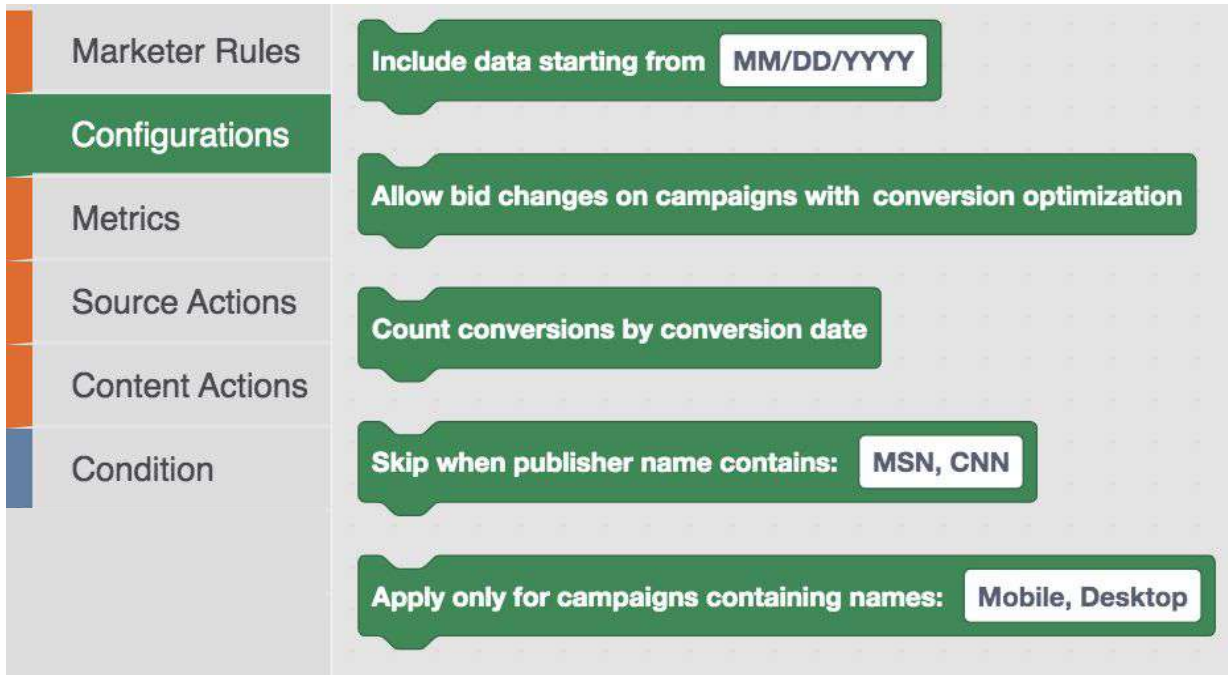


Once you identify the one you want, click or drag it onto your canvas and fit the block into the ‘Every hour’ block.

Also, don’t forget to modify the length of time in the marketer rule as needed.

2. Configurations

Configurations are additional parameters or exceptions that the rule needs to take into account. ***This is an optional block.*** This allows the rule to have added flexibility. They are identified by the green color shown below.



If you want to add in any of these additional configurations, you'll need to drag them onto your canvas and carefully fit it directly under the 'Every Hour' block until you hear a click.



Below are the various Configuration Types:

‘Include data starting from’ - Only look at metrics from a specific starting point.

‘Allow bid changes on campaigns with conversion optimization’ - This allows bid changes via OB Code even when Semi Automatic mode is enabled. Normally, bid changes are ignored when CBS is enabled.

‘Count conversion by conversion date’ - Conversions will be counted when the conversion happens vs. when the click happens.

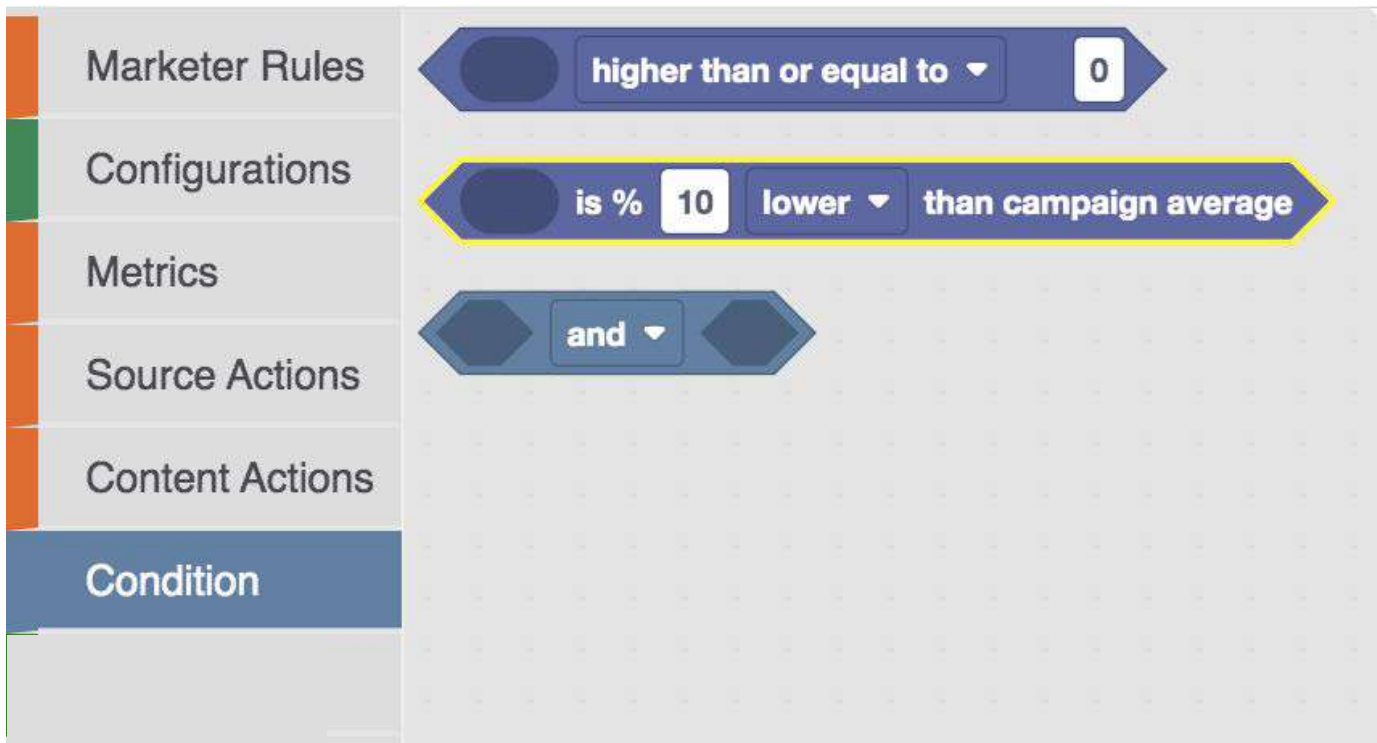
‘Skip when publisher name contains’ - The rule will not take effect on the specified publisher if the specified publisher meets the criteria of the rule. You can place several publishers here in comma delimited format.

‘Apply only for campaigns containing names’ - The rule will only take effect on campaigns that contain the specified string.

These are not required for the rule, but can be implemented for added flexibility within the rule.

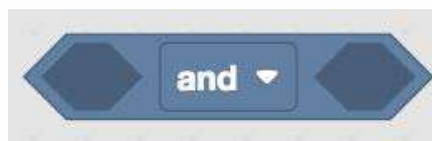
3. Conditions

If you select a Marketer rule that includes an 'if' statement, you need a condition as part of the rule.



If you want to make sure that 2 conditions are considered/met, make sure to select the 'AND/OR' (select in the drop down the one you want) condition (see below). The 'AND/OR' condition will allow you to insert 2 additional conditions into the block.

NOTE: 'AND' = both conditions must be met, 'OR' = one of the conditions must be met)



First, you need to drag it onto the canvas. Then, you go back to Conditions and choose the 2 relevant conditions you want to put into your rule.

Conditions are defined as followed (use the drop downs to select the relevant statements):

- Higher/Lower/Equal to an absolute amount OR
- Percentage lower/higher than the campaign's average

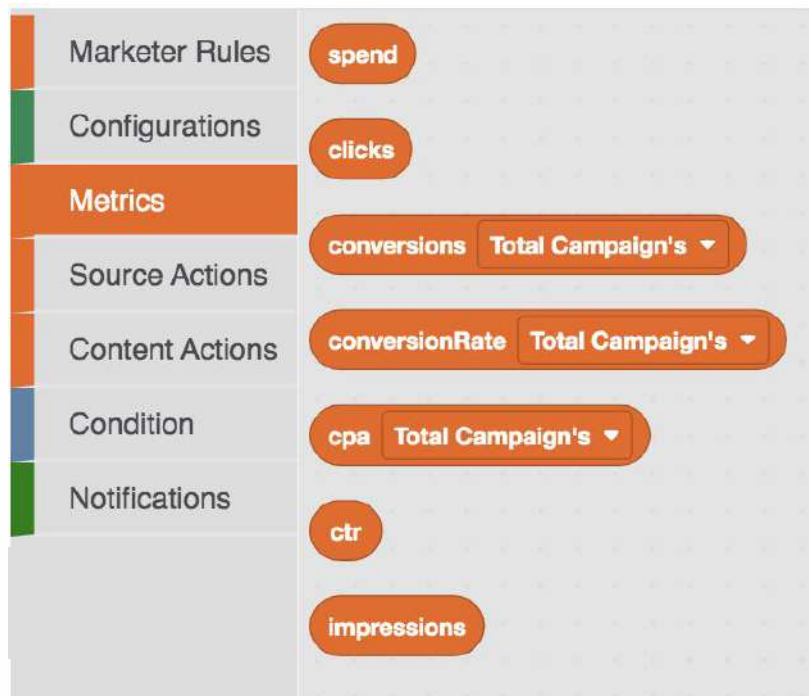
You will need to define the absolute number or the percentage in the rule.

You can either click on them or drag them onto the canvas and then insert them into each of the Hexagonal spaces until you hear a click.

Next, you will need to select your metrics (**See #4**) and define your thresholds.

4. Metrics

Metrics need to be defined for conditions. Per the below image, you have several metrics to choose from.



These metrics should be inserted into the circular area of the condition (see below where spend is inserted).



If you have an 'AND/OR' condition, please make sure to select your second metric as well (see below where CPA is inserted).



For conversion related metrics like conversions, conversion rate, and CPA, you can either choose 'Total Conversions' or a specific conversion that the rule should be considering.

5. Actions

Depending on the type of Marketer rule you are building (Source Rule or Content Rule), you will need to select either Source Actions or Content Actions to complete your rule.

Source Actions are as follows (and are identified by an orange color):

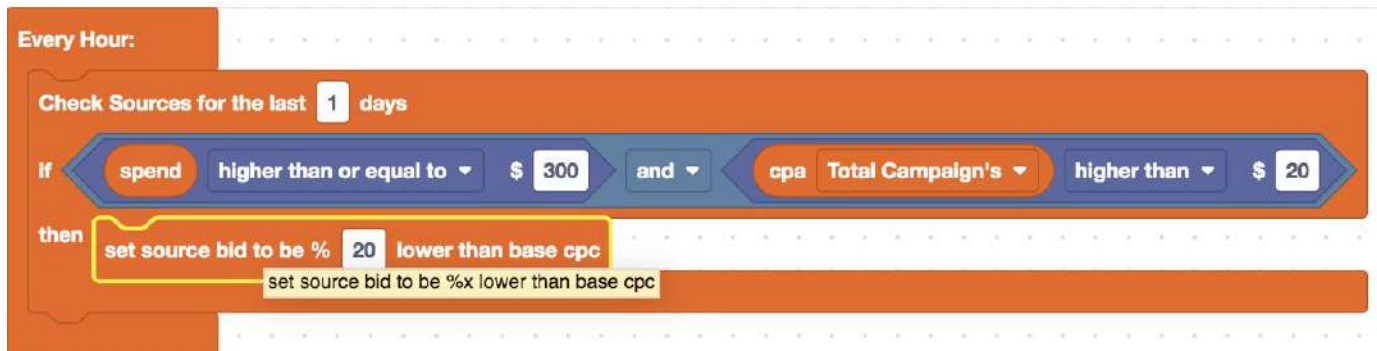
Marketer Rules	set source bid to be % <input type="text" value="15"/> higher than base cpc
Configurations	set source bid to be % <input type="text" value="10"/> lower than base cpc
Metrics	
Source Actions	set source bid to be as base cpc
Content Actions	exclude the source
Condition	

Content Actions are as follows (and are identified by a dark blue color):

Marketer Rules	set content bid to be % <input type="text" value="15"/> higher than the base cpc
Configurations	set content bid to be % <input type="text" value="10"/> lower than base cpc
Metrics	
Source Actions	set content bid to be as base cpc
Content Actions	pause content
Condition	

These 'Actions' will finalize your rule by completing the 'Then' Block.

You can drag the relevant action (source action if you have a source based rule or content action if you have a content based rule) onto the canvas and move it carefully into the 'Then' block until you hear a click (see below).



Don't forget to adjust the percentage change you want the rule to take if the condition is met.

Section VI: How Do I Make Changes Once The Rules Are Active?

Disabling Rules

Disabling a rule is easy! Just go to the main OB Code screen where you see all your rules. Simply toggle the Active setting from Green to Grey.

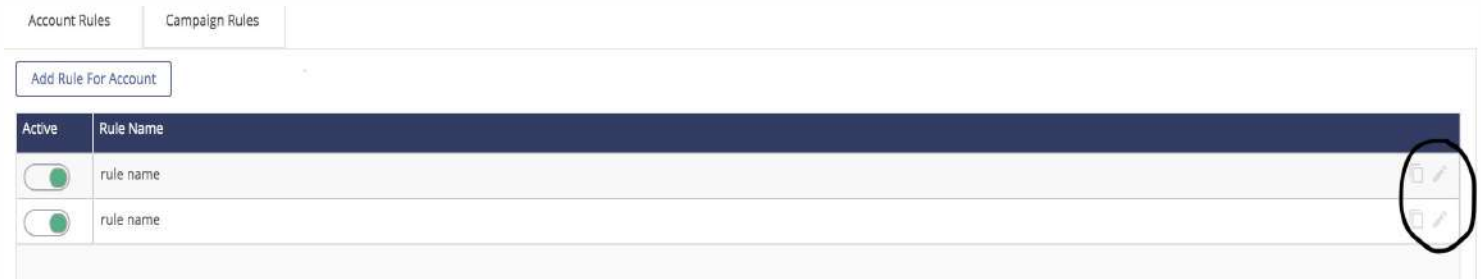


You can also reactivate the rule from toggling the Active setting from Grey to Green.

Modifying Rules

You can easily edit your rules once they are live.

On the rule you want to Edit, click on the small pencil on the right. That will bring you back to the OB Code canvas where you can edit the rule. Once you edit your rule, don't forget to click "Test Run and Save" so your modified rule becomes active.



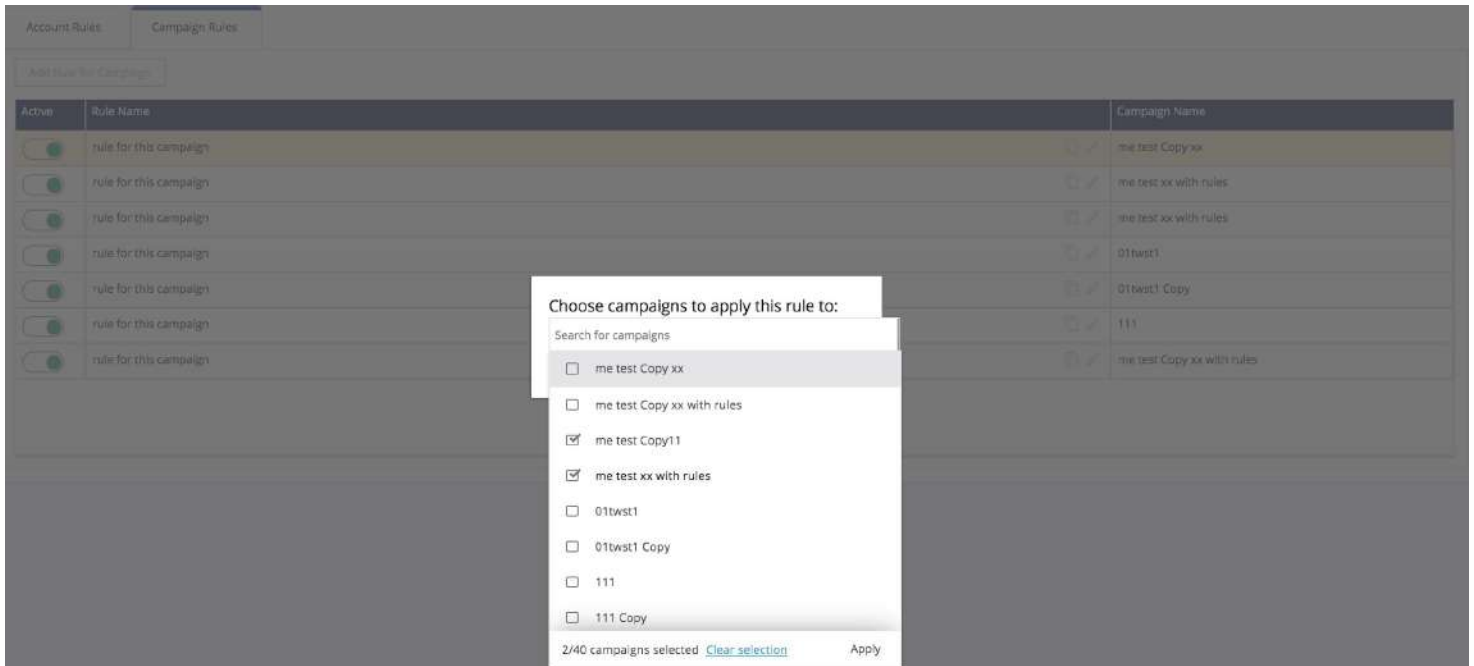
Copying Rules

You also have the ability to copy rules if you want to use them on additional campaigns and also accounts.

Copying Campaign Level Rules:

If you want to copy rules from one campaign to other campaigns in the same account, go to your campaign rules tab and click on the “copy” icon at the right on the specific rule you are looking to copy.

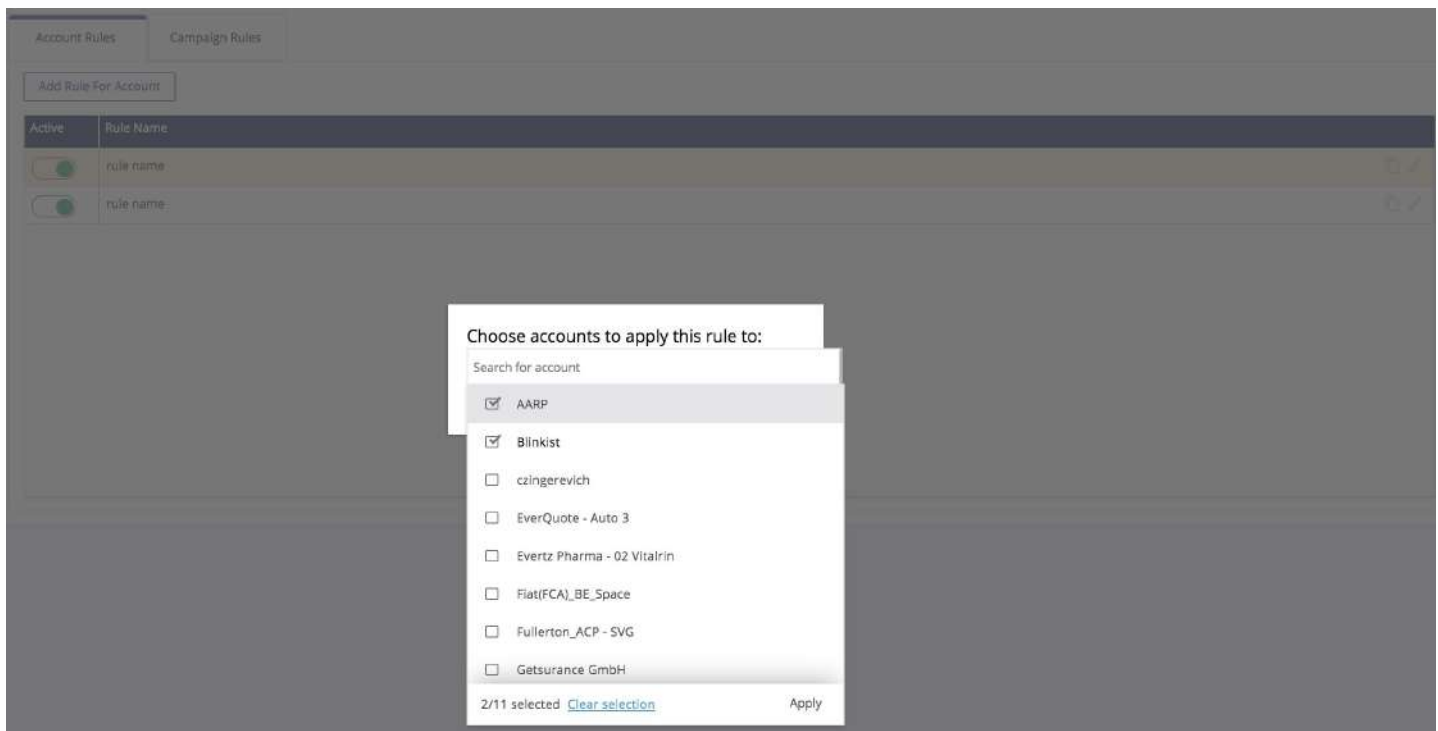
Once you do this, you will be prompted to select the campaigns you want to copy the rule to (see image below) and Click ‘Spread’ to activate this change.



Copying Account Level Rules:

If you want to copy rules from one account to other accounts , go to your account rules tab and click on the “copy” icon at the right on the specific rule you are looking to copy.

Once you do this, you will be prompted to select the accounts you want to copy the rule to (see image below) and Click ‘Spread’ to activate this change.



Section VII: Things to Note

1. Bid changes on OB Code will be ignored on campaigns that are on Conversion Bid Strategy.
2. Bid changes via OB Code are supported on Semi Automatic Mode **ONLY** when you add the Configuration 'Allow bid changes on campaigns with conversion optimization'.
3. Please check your rules carefully before you activate them. There is no additional screen before they go live so it's important to validate them yourself before committing them.
5. Please join the OB Code Community channel located [here](#)! Within this channel, you will receive all updates regarding OB Code and can also ask any questions you might have. Please also share any feedback on OB Code within this channel as well!
6. If you have more ideas for predefined templates, please share these within the OB Code community [here](#)!



**Feel free to contact your Account Manager
with additional questions!**