OMNITURE™

SEARCHCENTER BID RULES

Tracking Metrics and Applying Actions

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1 What are Bid Rules?

SearchCenter Bid Rules are used to make bid adjustments for groups of keywords based on predetermined criteria that are fully customizable to the needs of each client.   Some rules have been prepared for immediate use although individuals are given the option to create a custom rule based on their business goals. Keywords can be bid up, bid down, and paused based on the size of return they are providing, or based on the time of day, etc. For example, you want to track the Return on Ad Spend (ROAS) metric for a keyword. Return on Ad Spend is calculated by dividing revenue by keyword cost. You want this metric to be greater than 100% because if, for example, you are spending $20 on a keyword, but you are making only $15, then you are just breaking even? With SearchCenter Bid Rules, you can remove the keyword if it is making only $15. The keyword, obviously, is ineffective. However, if the keyword is making $40, then you can automatically increase your cost per click metric (CPC). By setting up rules such as this one, you enable SearchCenter to automatically track metrics for your keywords and automatically make adjustments, as necessary.

1.1 Creating New Bid Rules

Omniture enables you to quickly create Bid Rules in SearchCenter and to apply them directly to your keywords. To create new Bid Rules, log in to SearchCenter, click **Automation** in the left navigation box, and then click **Keyword Bid Rules**. The following window will display.
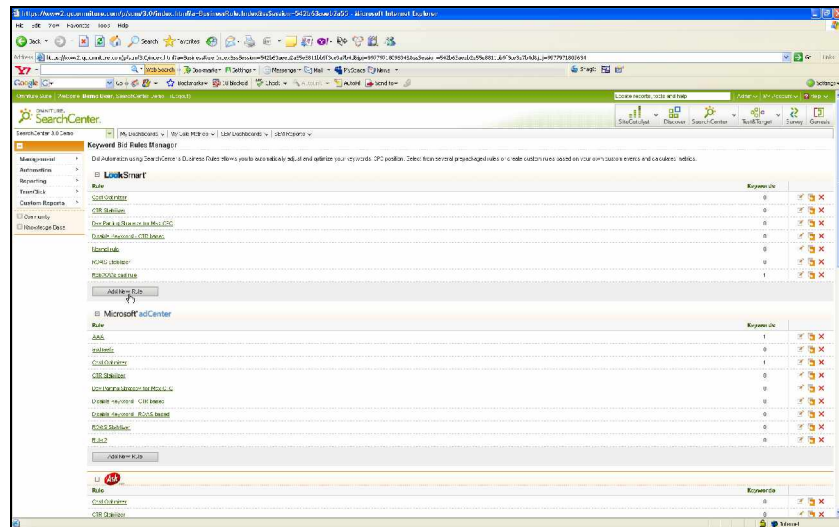
Figure 1-A: Bid Rule Manager
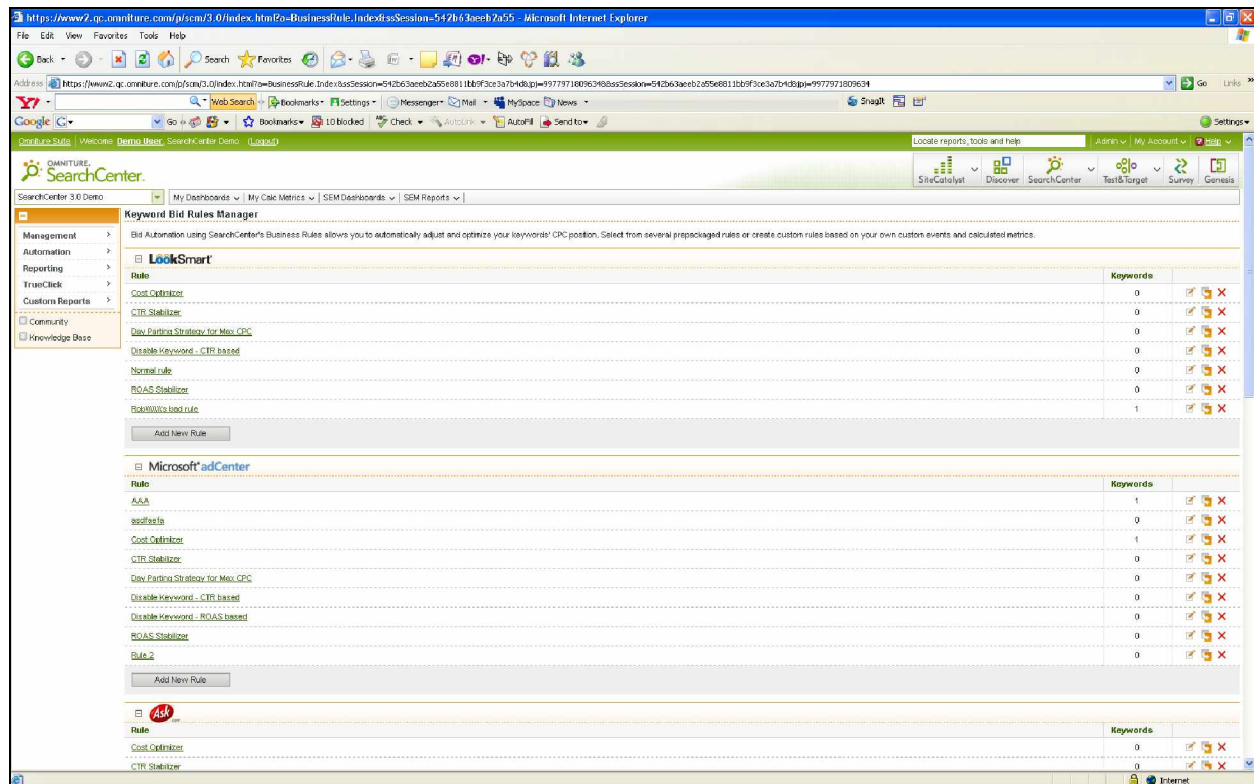
Each search engine has its own Bid Rules and these must be managed independently for each. As the Bid Rule Manager shows, the Bid Rules that are created for a search engine are displayed directly under the name of the search engine. If you want to apply the same Bid Rules for two different search engines, you will have to create two separate Bid Rules for the two search engines. Each search engine section contains its own button that enables you to add a new rule. Follow the steps below to create new rules.

Table 1-A: Creating a Bid Rule

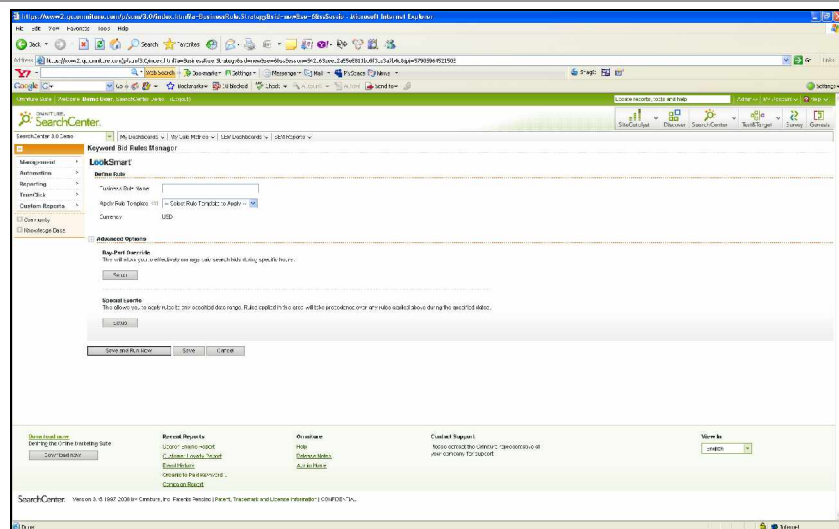| Step	
1. Under the desired search engine, click **Add New Rule**.	
2. Type the name of your Bid Rule. **NOTE:** Select a name that will be easily recognized in the Bid Rule Manager. 3. Select a Bid Rule template. SearchCenter offers several templates for creating Bid Rules. Each Bid Rule type contains a different template. Fields specific to the template will display below the template type once you have selected the template. For more information on the template types, refer to the *SearchCenter User Manual*. 🖉 **NOTE:** For the purposes of this document, Custom Rule will be the template of choice.	

Step

4.Select the time frame for the rule.

The Evaluation Period selected is the time frame over which the criteria are evaluated. The Bid Rules calculate and execute a change based on either a rolling average or a sum total of certain metrics over time. The rolling average is available for the following metrics.

- ROAS
- Average Position
- Custom Metrics that are percentages

Sum totals are used for the other metrics.

✎ **NOTE:** If you want an email to be sent when an action occurs, click the check box below the time frame drop down box and enter an email address.

Once you have entered the basic information, you can then configure the actions sets for this rule. Each rule is set to perform certain actions based on criteria and actions that a user can specify. When the user-specified criteria are met, SearchCenter will perform a predetermined action such as a bid change.

**Table 1-B: Creating Action Sets in SearchCenter**

Step

4. Select the metric to track.

5. Select the operator (<, =, or >).

6. Assign a value.

By assigning an equals (=) operator, usually only a single action is required. For example, if visits equals 100 after seven days, then perform this action. Frequently, if you use a less than operator (<) in the first action; i.e. if visits are less than 100 after seven days, perform this action, you may also want to create a second action; i.e. if visits are greater than 1000 after seven days, then perform this action.

7. Click **Add**.

📝 **NOTE:** Repeat as necessary; multiple criteria may be included in each action set.
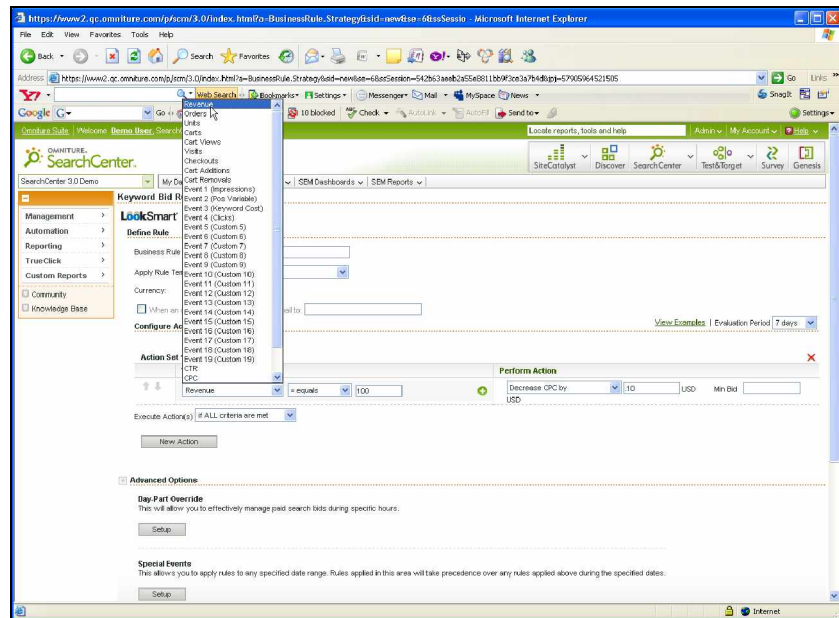
Step

|	
8. For the criteria you selected, set the desired action. In this case, you set the criteria of "if the number of visits after seven days is less than 100" or "if the number of visits is more than 1000." The corresponding action is "decrease the cost per click (CPC) by $0.10 to a minimum of $0.25. Subsequent actions sets are subordinate to the action sets above them. The ranked order can be modified using the arrows at the top, left of each action set. 9. Set the minimum bid for your cost per click. You can click the Create New Action Set link in order to create multiple actions for your criteria. 10. Click **Save**.	
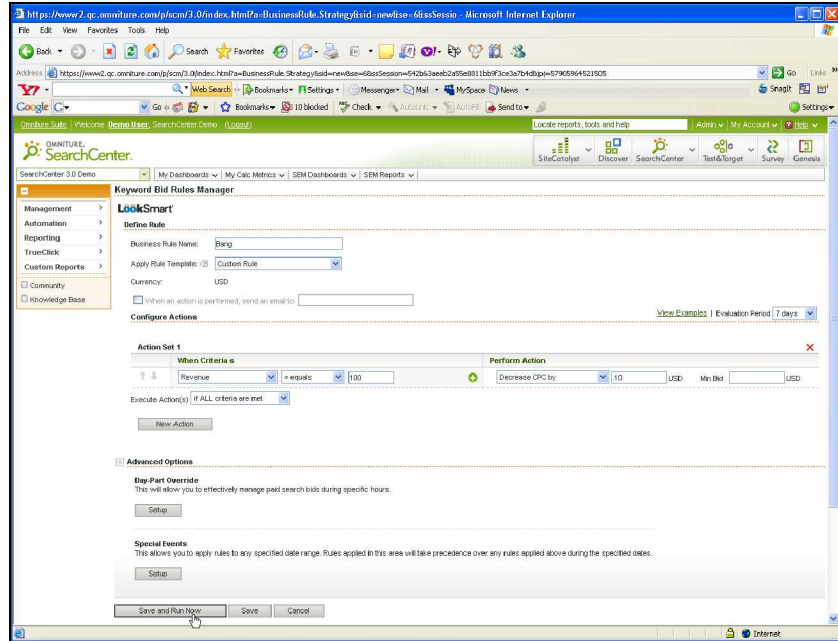
You can also click the Advanced Options link to select Day Part Overrides and Special Events, which enable you to apply a Bid Rule to certain hours of the day or to special events such as holidays. For more information on enabling and assigning Bid Rules to Day Part Overrides or Special Events, refer to *Assigning Bid Rules to Day Part Overrides or Special Events* in this document.

🖉 **NOTE:** Occasionally, users think that once the Bid Rules are created in the Bid Rule Manager, then they are automatically applied to SearchCenter keywords. This is not the case. They must be applied in SearchCenter.

1.2 Assigning Bid Rules to Day Part Overrides or Special Events

In addition to standard Bid Rules, SearchCenter offers the Day Part Override and Special Events features. With these advanced options, you can apply a Bid Rule during specific hours of the day or during a specific event such as a holiday. To access either option, open an existing Bid Rule, or create a new Bid Rule in the Bid Rule Manager. Next, click Setup next to either of the **Advanced Options** After clicking the Setup buttonyou will be taken to a setup wizard that will guide you through the steps to create a Day Part Override rule or a Special events rule.

🖉 **NOTE:** If the Bid Rule Manager is displayed, but no rules are listed, you will be directed to create a rule before you can create Day Part Overrides or Special Events.

1.2.1 Creating a Day Part Override Rule

By clicking the Setup link below the Day Part Override Advanced Option section, the following window will display.

Figure 1-B: Day Part Override Wizard

You can click-and-drag the action to assign to the rule on the desired hours of the day. For example, if you want to disable the keywords between the hours of 10 pm and 12 am, you would click-and-drag the Disable Keyword link to the boxes representing the hours of 10 pm and 12 am. When you are finished, click **Save**.

1.2.2 Creating a Special Events Rule

By clicking the Setup link to the right of the Special Events Advanced Option section, the following window will display.

Figure 1-C: Special Events Wizard

Give the special event a name that represents the event itself. Next, assign a start and end date for the events, and then click **Add** to create the Special Event rule. When you are done, click the check box to the left of the new rule, and then click **Assign to Bid Rule**. You will then be directed back to the Bid Rule Manager

1.3 Applying Bid Rules to Keywords

When you have completed your Bid Rules, you can then apply them to keywords in SearchCenter. Click **Management** > **Keywords** to apply bid rules to keywords.

NOTE: You can also drill down from higher levels to access the keywords. For example, you can start at Search Engines and drill down until you get to the keywords.

When the keywords display, click the check box to the left of the keyword to which you would like to apply the bid rule. Next, click the Edit icon. The Edit Keywords window will display as shown below.

Figure 1-D: Special Events Wizard

From the Bid Rule drop-down box, you can select the bid rule to apply to the keyword. Click **Save** when you are finished.

Creating Bid Rules as Classifications

In addition to running Bid Rules to optimize for campaign and keyword performance, you can also build a classification to help you report and manage your Bid Rules. Follow the instructions below to create a Bid Rule classification.

1. Log in to SearchCenter.
2. Click **Management** > **Classifications**.
3. Click the Add icon (+).
4. Type the name of the classification.
5. Click **Save**.
6. Once the classification icon has been created, use the Excel integration or the Bulk Upload Tool (**Settings** > **Bulk Upload**) to download a spreadsheet with existing data.
7. Find the Bid Rule column in the spreadsheet (exact location will vary based on search engine). Copy the contents of the column onto your clipboard.
8. Find the Bid Rule classification column you just created, which should be one of the last columns in the spreadsheet. Paste the data copied from the Bid Rule column into this column. Since the rows are formatted in the same order, pasting this data here should align each row with the correct keyword.
9. Upload the new file accordingly, and allow one business day for the classification to process.

Repeat this process as necessary when updating your Bid Rule assignments to keep the information current. You can also do it from the Keyword Manager, as shown below.
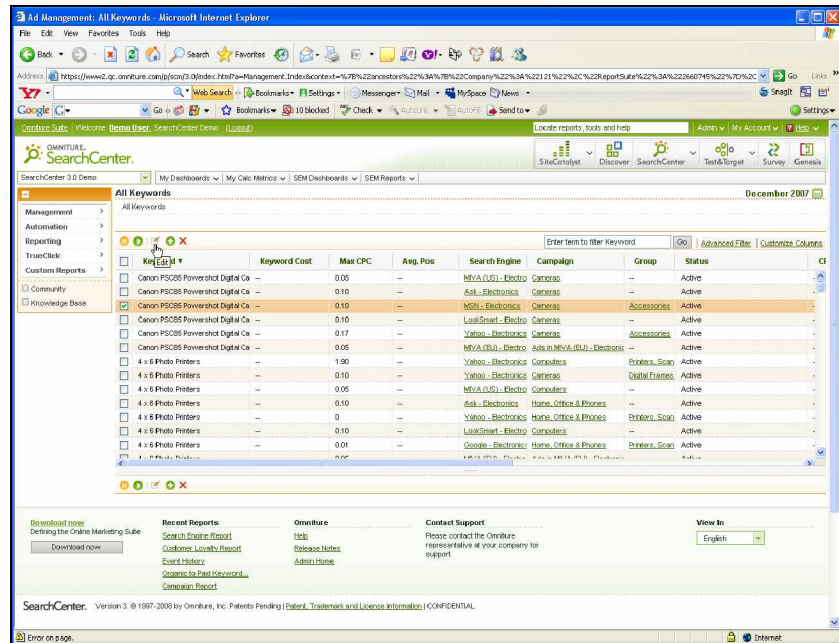
Table 1-B: Assigning Classifications to Bid Rules

Step
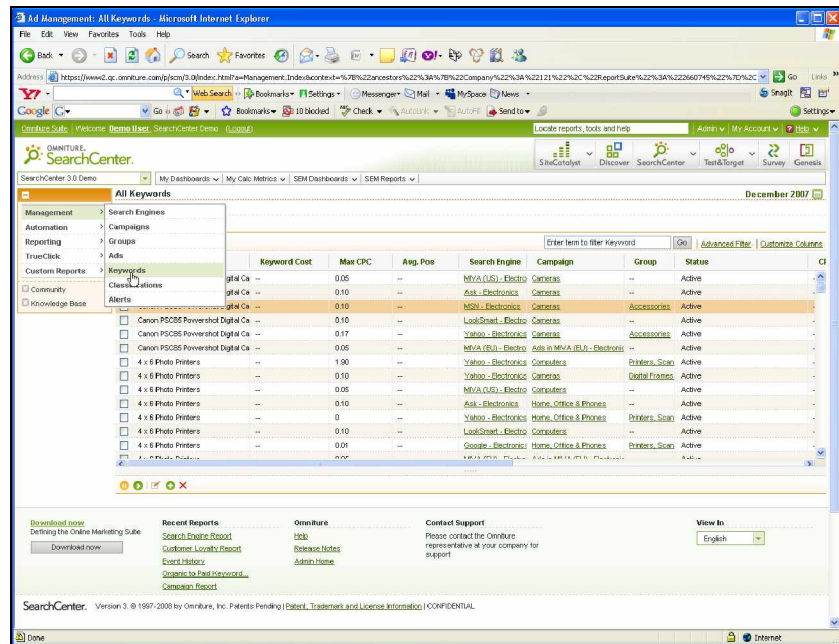
|	
1. Log in to SearchCenter. 2. Click **Management** > **Keywords**.	
3. Click the check box to the left of keyword to which you would like to associate the classification. 4. Click the Edit icon.	

Step

5. Select the classification.

6. Type the name of the subclassification.

✏️ **NOTE:** Make sure the name you give the subclassification is the same name you give to the bid rule.

7. Click **Assign**.

8. Click **Save**.
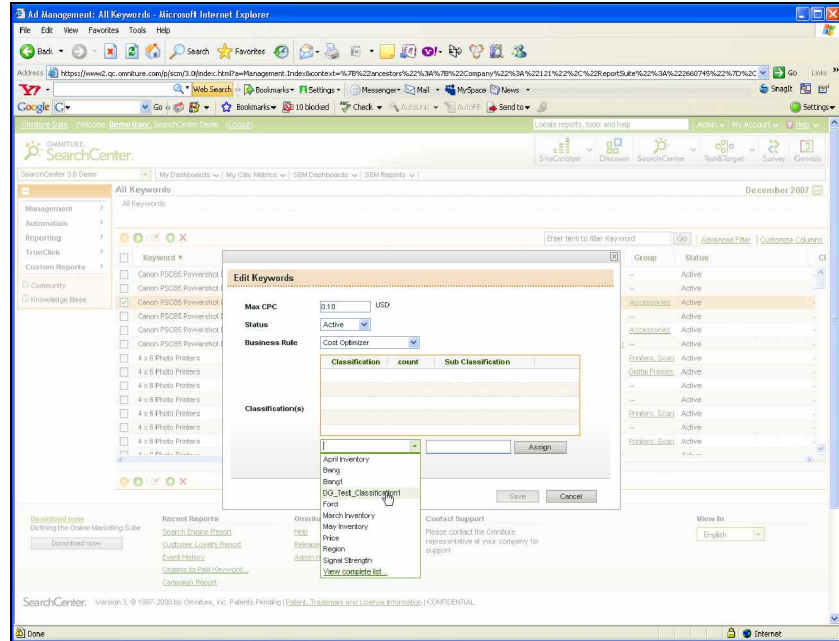
Using this classification in the reporting interface will allow you to see how each Bid Rule is performing according to each of your key performance metrics. To utilize this classification in SearchCenter, run any report and subrelate (break down the report using the magnifying glass icon) the report by SearchCenter > [Bid Rule classification]. Sort the report by your most important metrics to see how each Bid Rule is performing.

1.4 Additional information

The following information may be useful in setting up and using SearchCenter Bid Rules.

- Think of the Average Position metric as a number value. For example, an average position of 5 is less than an average position of 10, and is greater than an average position of 2.

- The value you enter for metrics like ROAS or custom formulas should be entered in the format to which the formula is set. ROAS and other custom metrics can be a percentage, dollar amount, or an integer. If ROAS is set to report as a percentage, the user should enter their ROAS threshold as a percentage.
    - Example 1 - If ROAS is set to report as a percentage and the client would like to set a criteria of ROAS being less than 500%, he or she would set it up like this: ROAS<500. NOT 5.0 or 500%.
    - Example 2 - If a custom CPA metric is set to report as a dollar amount, and the client would like to set the criteria to CPA being greater than $25.00, he or she would set it up like this: CPA> 25.

2 Frequently Asked Questions

What is Day Part Override

With Day Part Override, you can select certain hours of the day or night to which you can enable or disable a Bid Rule. This is especially helpful if, for example, you don't want to be paying for keywords during slow hours.

Why are Bid Rules divided by search engine?

Bid Rules are divided by search engine because each search engine works differently. The search engines may have differences in features, rules, etc. Therefore, rules cannot span multiple search engines. If you want the same Bid Rule for two different search engines, you will have to create the same rule twice – once for each search engine.

If I create a Bid Rule, on what days of the week is the rule applied?

A default Bid Rule is applied to all seven days of the week. You can also create separate rules for special events such as holidays.

What is the difference between using the rule templates and creating custom rules?

The templates enable you to create rules very quickly by just assigning values to the given fields. Custom rules are more powerful in that you can set both the criteria and the associated action.

How do I copy Bid Rules across report suites?

Currently, there is no way to copy Bid Rules across report suites. The rules must be created separately in each report suite.

Why isn't my newly created Bid Rule taking action?

Check to be sure that the Bid Rule has been properly applied to keywords, if no keywords are assigned to the rule then it will not run. Also, depending on the evaluation period selected, SearchCenter may not have sufficient data yet to run the rule. If the rule is set to evaluate thirty days but the campaign was imported less than a week ago then the rule will not run until there are thirty complete days of data to evaluate.

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