

Omnichannel ads setup guide

Foreword

Omnichannel ads and Meta tools are subject to change. As such, they may both have differences over time. If anything seems wrong, contact your representative with the following information.

I'm blocked on **{Step number and letter}** on omnichannel optimisation setup because **{Reason}.**

Business ID: **{Business ID}**
Catalogue ID: **{Catalog ID}**
Page ID: **{Page ID}**
Ad account ID **{Ad Account ID}**
Offline dataset ID **{Dataset ID}**

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Setup requirements

To run omnichannel ads, you must complete the requirements below.

Requirements:

- ❑ Your ad account has an active Meta pixel (Conversions API)
- ❑ Your ad account is receiving offline events via the Conversions API with the offline dataset attached to all ads in your account using automatic tracking.
- ❑ Your ad account has a dataset that receives both website and offline events
- ❑ Your website events meet the event match quality threshold
- ❑ Your offline events meet the offline data quality threshold
- ❑ "Website and in store" is the conversion location for your campaign
- ❑ You're using the right catalogue and/or dataset in your ad set or ad.

Nice-to-have:

- ❑ Include contents, content ID, shop ID in your offline events
- ❑ Connect your main dataset to a catalogue. This will allow you to run Advantage+ catalogue ads.
- ❑ Add your physical shop information to Store locations. This will allow you to add local shop information to your static ads.
- ❑ Keep the store locations creative enhancement turned on for your ads to highlight the benefits of shopping in your stores.
- ❑ Set up a local inventory catalogue. This will allow you to run Advantage+ catalogue ads with in-store availability and pricing, a map card in creative and digital circulars.

Note: Omnichannel features are also supported via Marketing API.

Eligibility

Becoming eligible

To become eligible for omnichannel ads, your ad account must send quality online *and* offline data to Meta. This ensures that your omnichannel ads will deliver and perform as intended. Here are the steps that you need to take:

1) Set up and send website and offline events via the Conversions API
2) Set up a single dataset in Events Manager that receives both website and offline events.
3) Improve event match quality:
    a) Send multiple customer information parameters (e.g. phone, email, mobile advertiser ID etc.) to Meta to maintain a high rate at which your events are matched to Meta accounts.
4) Improve Offline data quality. Our system will consider the following factors over the previous 28 days:
    a) Frequency: How often you send data to Meta. You should be sending data at least daily.
    b) Freshness: How up to date your data is. It should be no older than 2.5 days from the time of transaction to the time of upload.
    c) Accuracy: Whether or not you pass offline data with no errors/inconsistencies (e.g. you should not pass website data as an offline event).
    d) Valid purchase values: Whether you pass a purchase value with all of your offline events.
    e) Store purchase volume: Upload all available shop transactions (not every business will have enough transactions to be eligible for omnichannel ads).
5) After the quality of your data improves, your ad account will be automatically allowlisted and eligible to run omnichannel ads. This process could take up to 28 days.

Tip: We strongly discourage basket-splitting of offline events, as this is likely to hurt campaign performance.

Troubleshooting data quality issues

If your data quality fluctuates, you can still run omnichannel ads, but the performance of your campaigns will be negatively affected. Here are a few steps that you can take to resolve data quality issues:

1) Check to ensure that you've selected the right dataset for your campaign, and are passing website and offline events to the same dataset.
2) Review dataset-related warnings in Events Manager, the Ads Manager campaign table and ad setup asking you to review your event setup.
3) Go to Events Manager > Data sources to get more information about each issue.
4) Email the issue to your developer, if applicable.
5) Address the issues.
6) Wait up to 28 days for improved event match quality and/or offline data quality.
7) When your data quality improves, you can expect performance to return to normal.

Note: *For more information about eligibility, contact your Meta representative. Criteria may change over time as we make improvements to the experience.*

Available campaign setups

	Static ads	Advantage+ catalogue and shopping campaigns
Objectives	Sales	Sales
Bidding	Highest volume only (value unavailable)	Highest volume only (value unavailable)
Targeting	All options available for sales campaigns	All options available for sales campaigns
Connecting a catalogue	Ad level only (optional)	Campaign level
Catalogues supported	All catalogue types	All catalogue types
Local catalogues supported	Yes	Yes
Catalogue requirements	None	Must be connected to a dataset that receives website and offline events.
Dataset	Should be receiving both website and offline events	Must be connected to your catalogue
Conversion locations	Website and in store	Website and in store
Performance goal	Maximise number of conversions	Maximise number of conversions
Conversion event	Purchase	Purchase
Attribution settings	7-day click 7-day click, 1-day view 7-day click, 1-day view, 1-day engaged view Incremental attribution	7-day click 7-day click, 1-day view 7-day click, 1-day view, 1-day engaged view Incremental attribution
Ad formats	All formats available for the sales campaigns, including Advantage+ catalogue, Reels, Partnership ads and existing organic posts.	All formats available for the sales campaigns, including Advantage+ catalogue, Reels, Partnership ads and existing organic posts.
Store locations creative enhancement	Available for single image and video ads when your business Page has up-to-date store locations.	Not available
Creative from Creative Hub	Not supported	Not supported

Using store location data

With omnichannel ads, you can leverage store location data to target ads to nearby shoppers and drive awareness and sales to your shops.

Store locations Advantage+ creative enhancement

You can now display **store locations** on your omnichannel static ads with *single image or video format*.

Eligibility: Your business must have a Page with store Pages enabled.

Benefits: This enhancement is designed to drive shop awareness. We've observed in testing that omnichannel ads perform better with this enhancement turned on.

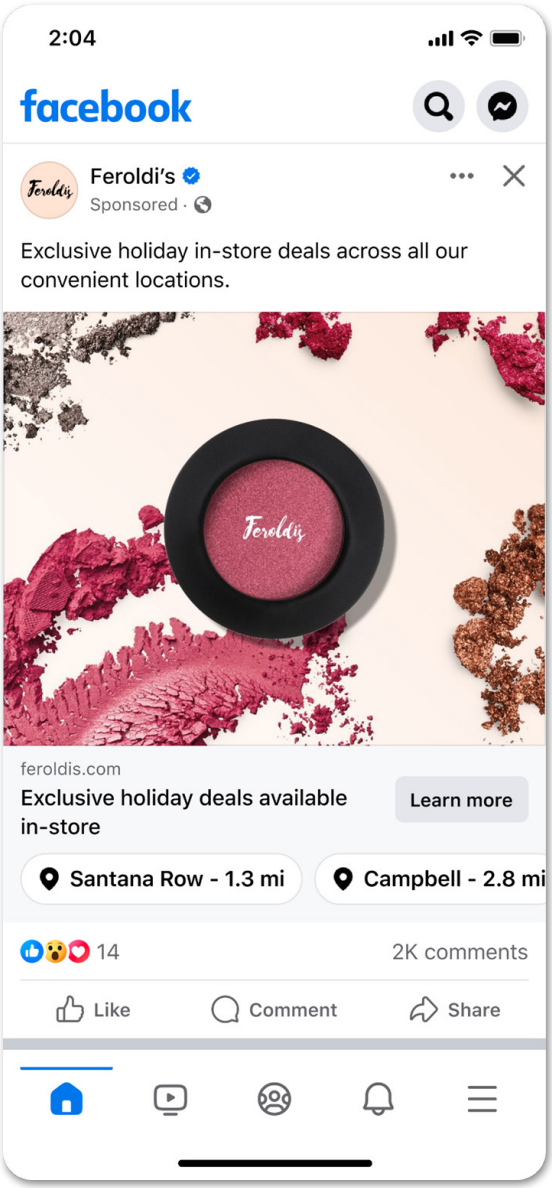
Ad experience: To shoppers, stores will appear under your ad creative based on the proximity to each person viewing the ad. Shoppers can tap the shop to open their native map app or view the store Page.

Default on: Store locations is turned on by default for *selected* eligible omnichannel campaigns.

Reporting: You'll see the same reporting as you would in any sales campaign. Store-level reporting is currently unavailable.

Important notes:

- *Not every ad will deliver with store locations, even when this enhancement is turned on.*
- *If shoppers haven't shared their precise location with Meta, your ad creative will still include store location(s), but not the shopper's distance from the shop.*
- *To preview your ad, we recommend using a device outside your company VPN, as this can affect your ability to see nearby shops in the ad preview.* *See if your Location Services are turned on.*



Using store location data (cont'd)

To set up shops on Meta:

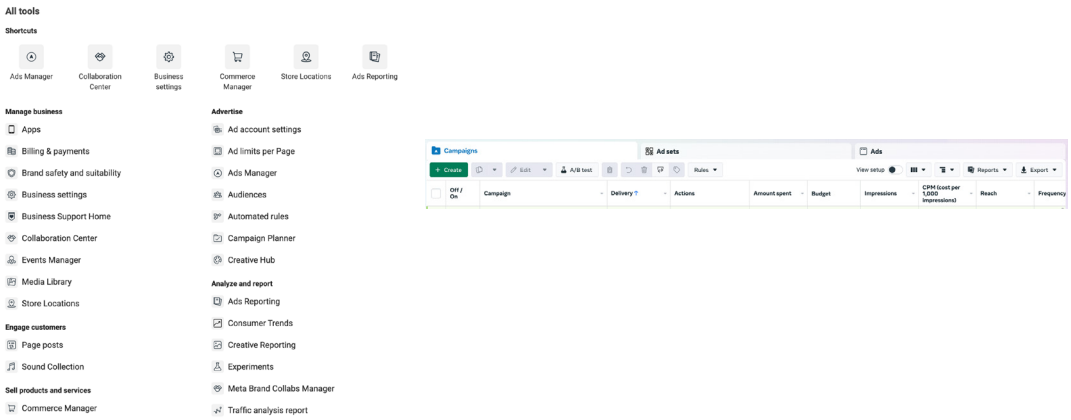
a) Go to **Store locations**
b) Select the Page in the top menu for which you want to add or edit shops.
c) To add or edit shops, tap **Add shops. Note that you can add 30 shops by default...** You can do this:
    i) Via Marketing API (recommended)
    ii) With a spreadsheet to bulk upload multiple shops at a time (instructions). *Contact your Meta representative for access.*
    iii) Manually if you have less than five shops (instructions)
    iv) By connecting an existing shop to your Page (instructions)
d) To manually edit shops, select your existing shops from the list and tap **Edit.**

Keep shops current: To get the best results from this enhancement, make sure that your shop information is up to date.

Setup instructions: Static ads

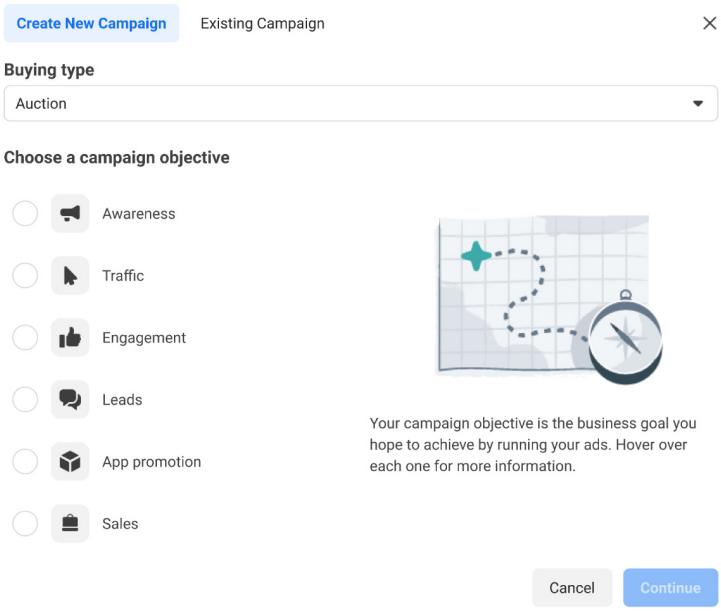
1

Go to Ads Manager and click **Create.**



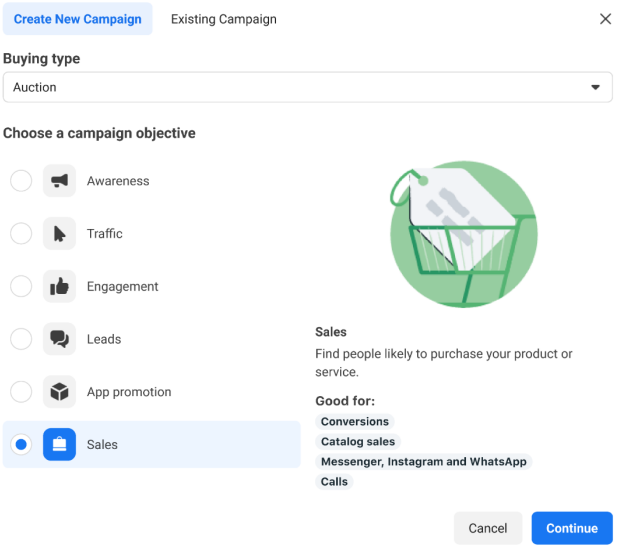
2

Under **Create a new campaign**, select **Auction** as your buying type.



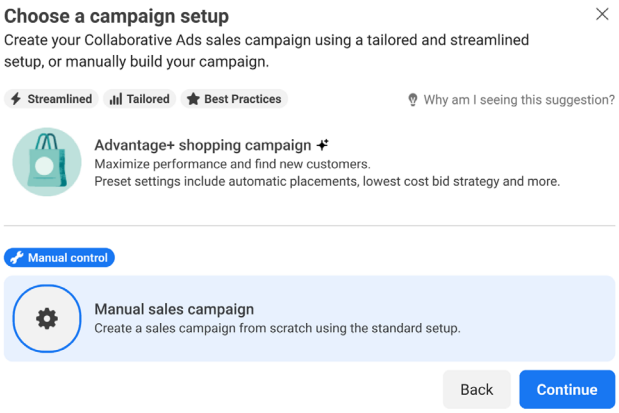
3

Select **Sales** as your objective and click **Continue**. Sales is the only campaign objective available at this time.



4

Under **Choose a campaign setup**, you can choose either a manual sales campaign or an Advantage+ shopping campaign. Click **Continue**.



5

On the ad set level, under **Conversion** and **Conversion location**, select **Website and in store** as your conversion location.

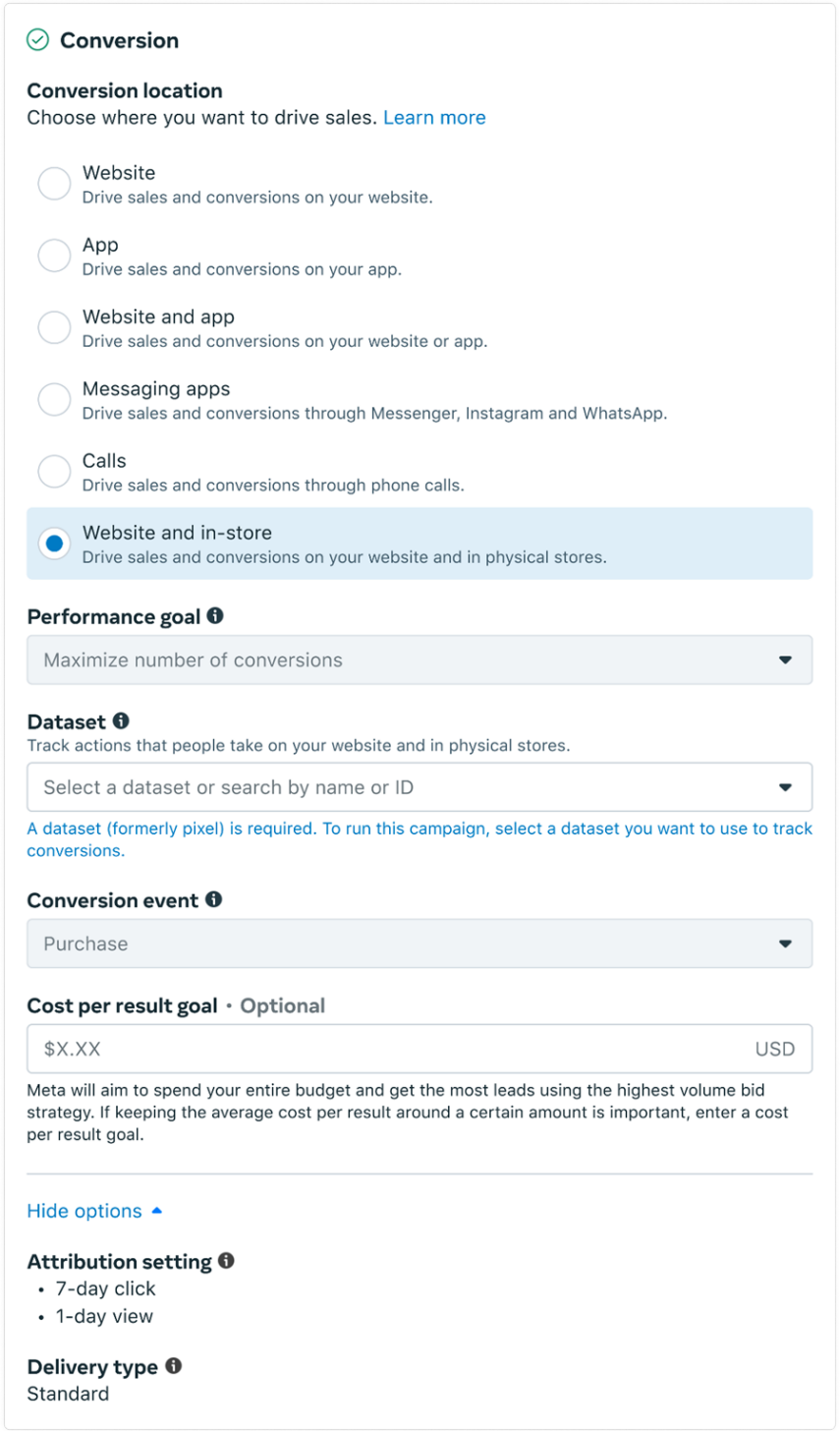
a) Under **Performance goal**, select **Maximise number of conversions.** *At this time, Maximise number of conversions is the only performance goal available for omnichannel ads.*

b) Under **Dataset**, select the dataset that you want to use. *This dataset should be receiving your website and offline data.*

c) Under **Conversion event,** select **Purchase**. *At this time, purchase is the only conversion event available.*

d) Leave **Cost per result goal** empty.

e) Under **Show more options**, and **Attribution setting**, you can choose from:
   i) 7-day click
   ii) 7-day click, 1-day view
   iii) 7-day click, 1-day view, 1-day engaged view
   iv) Incremental attribution

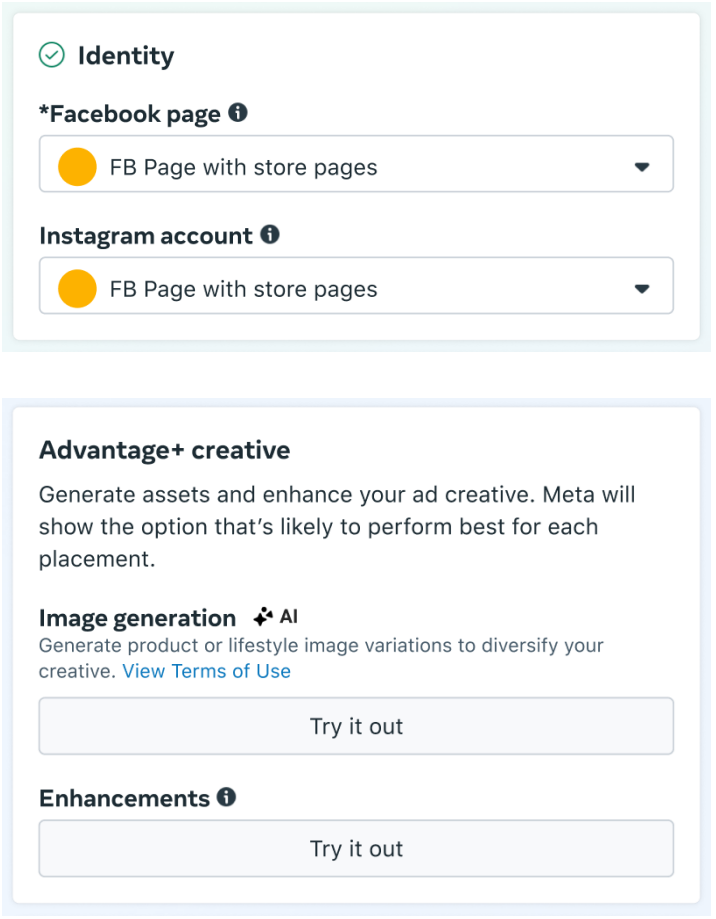


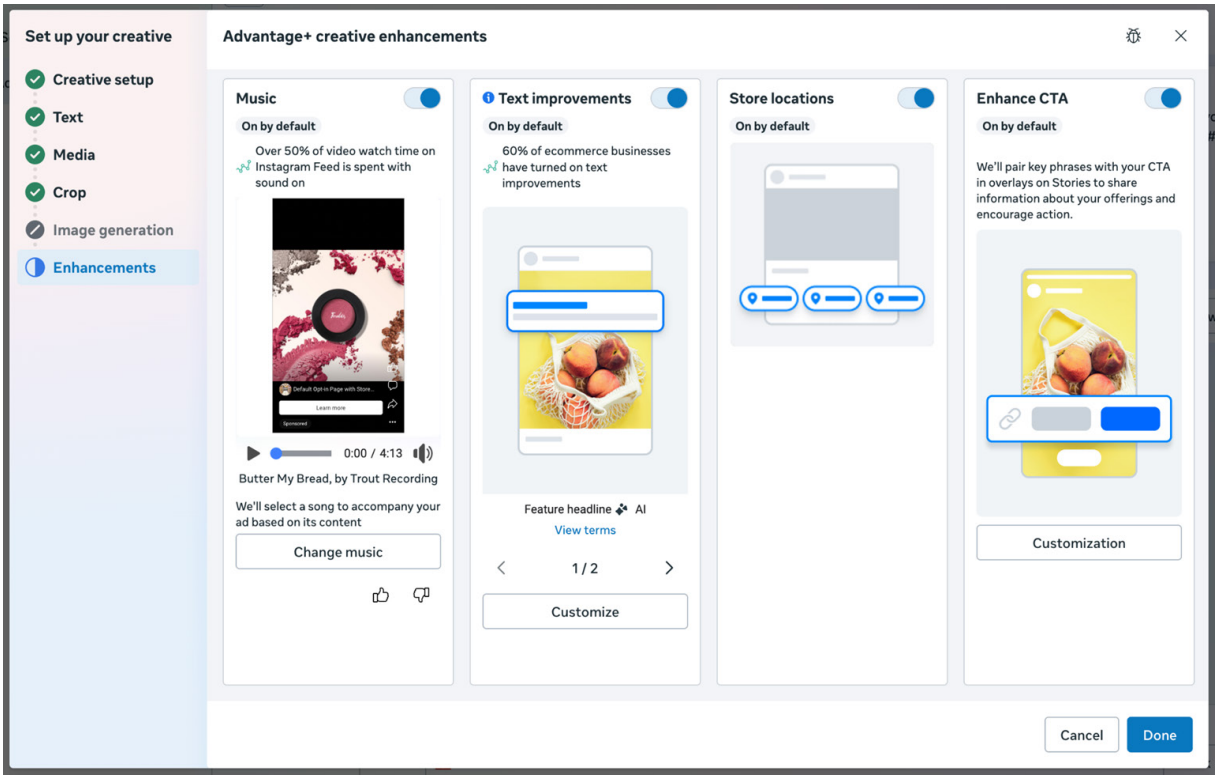
6

[Optional] To display store location information in your ad creative, you must have up-to-date store information in Store locations.

To enable this for your ads, go to the ad level.

1. Under **Identity**, select a Page with a store Pages structure.
2. Under **Format,** choose **Single image or video.**
3. Under **Advantage+ creative,** select the button under **Enhancements** to view all enhancements.
4. **Store locations** should be turned on by default.



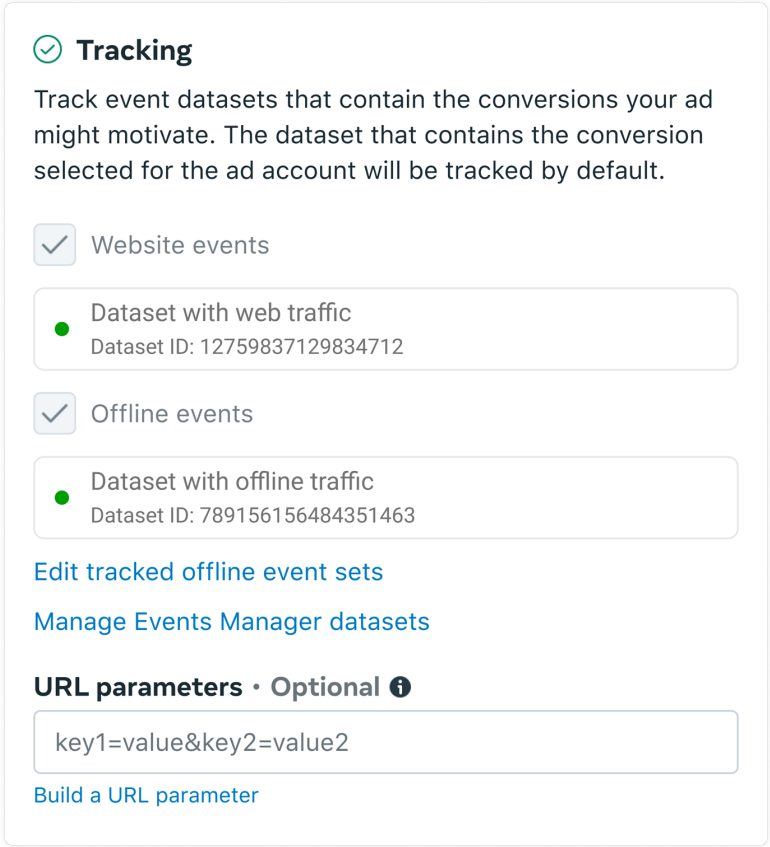


7

On the ad level:

a) Set up your ads as you normally would.

b) Under **Tracking,** select your **Pixel** and **Offline events** (can be an offline event set or dataset).

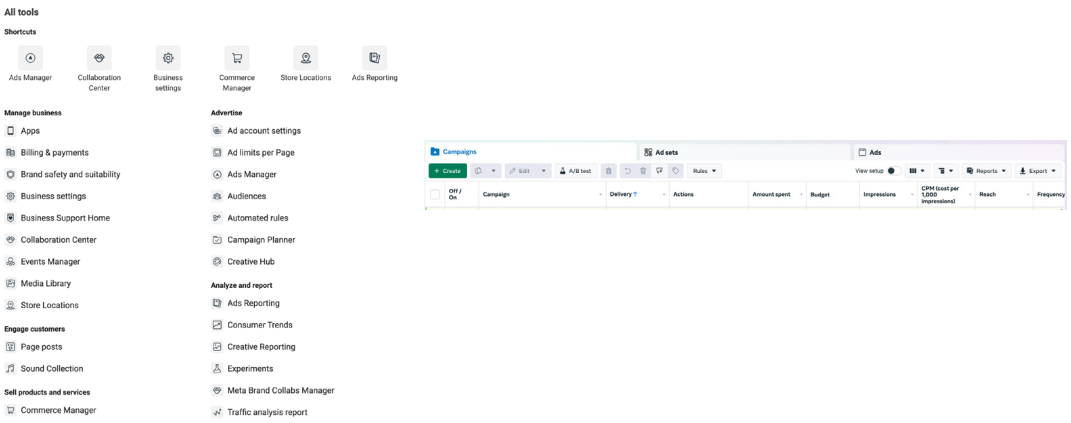


Advantage+ campaign setup

Step-by-step instructions:

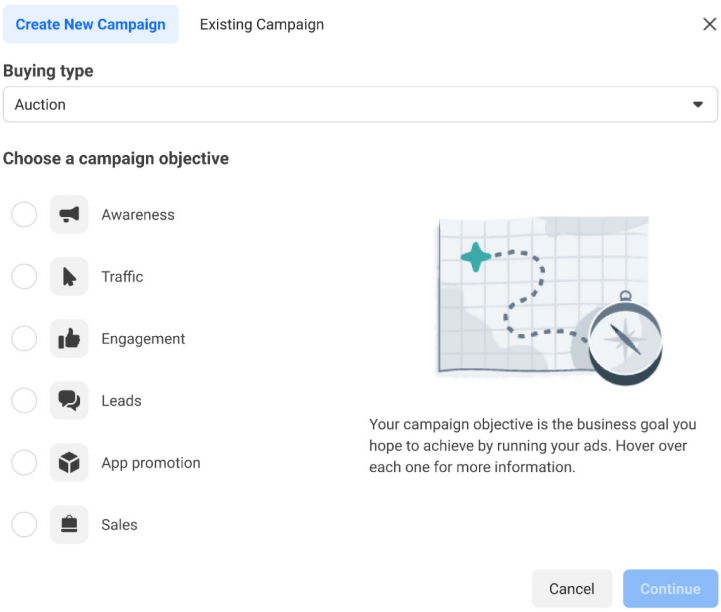
1

Go to Ads Manager and click **Create** (or you can duplicate reference campaign)



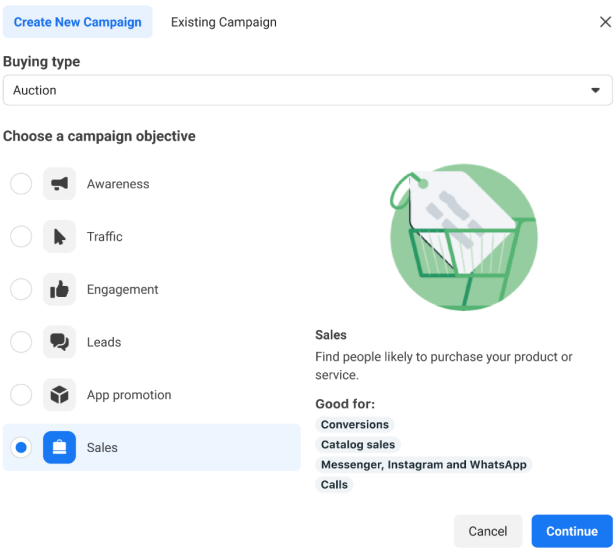
2

Under **Create a new campaign**, select **Auction** as your buying type.



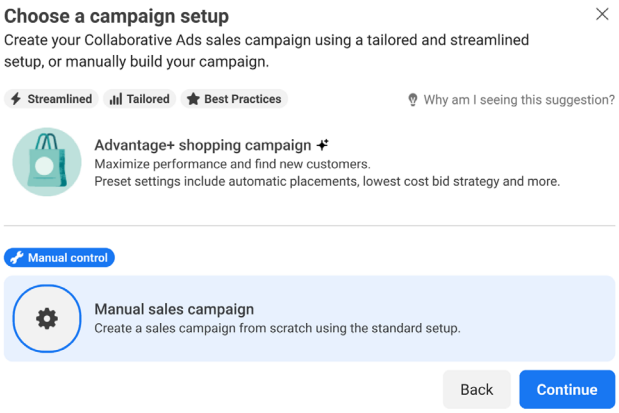
3

Select **Sales** as your objective and click **Continue**. Sales is the only campaign objective available.



4

Under **Choose a campaign setup**, you can choose either a manual sales campaign or an Advantage+ shopping campaign.
Click **Continue**.



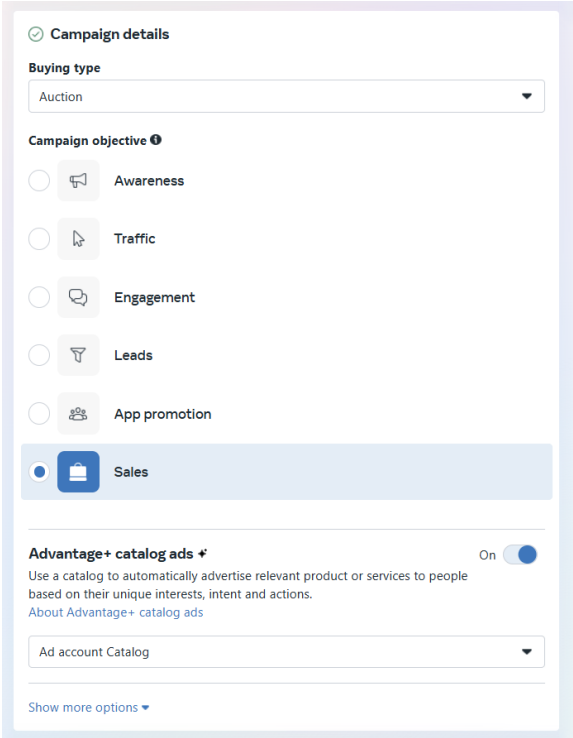
5

At the campaign level, enable the **Advantage+ catalogues ads** and select the catalogue that you want to use.

The selected catalogue needs to meet the following criteria:

1. Connected to a dataset that receives website and offline events.
2. There is a maximum of one active pixel attached to the catalogue.

A pixel is considered active if it has received a signal within the last 90 days. The number of pixels attached to the catalogue doesn't matter as long as there is only one active.



6

On the ad set level, under **Catalogue sales** and **Conversion location**, select **Edit** to expand the selection and then **Website and in-store** as your conversion location.

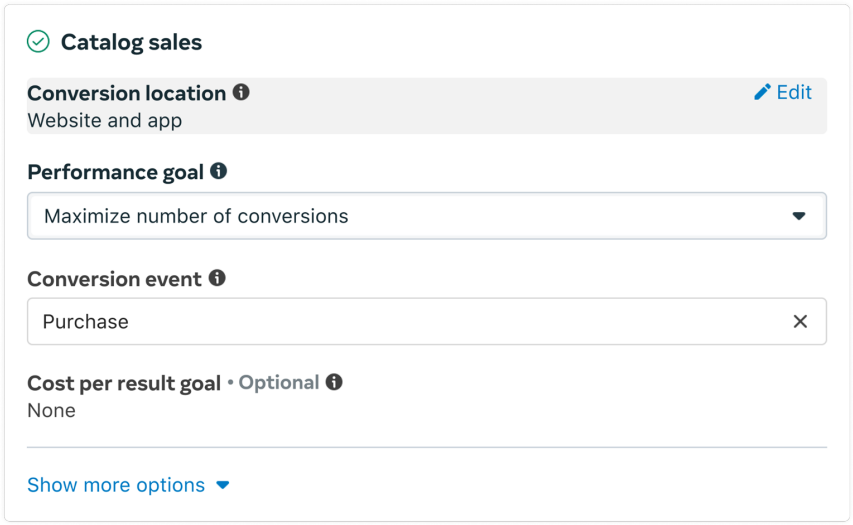
a) **Performance goal** will be defaulted to **Maximise number of conversions.** *At this time, Maximise number of conversions is the only performance goal available for omnichannel ads.*

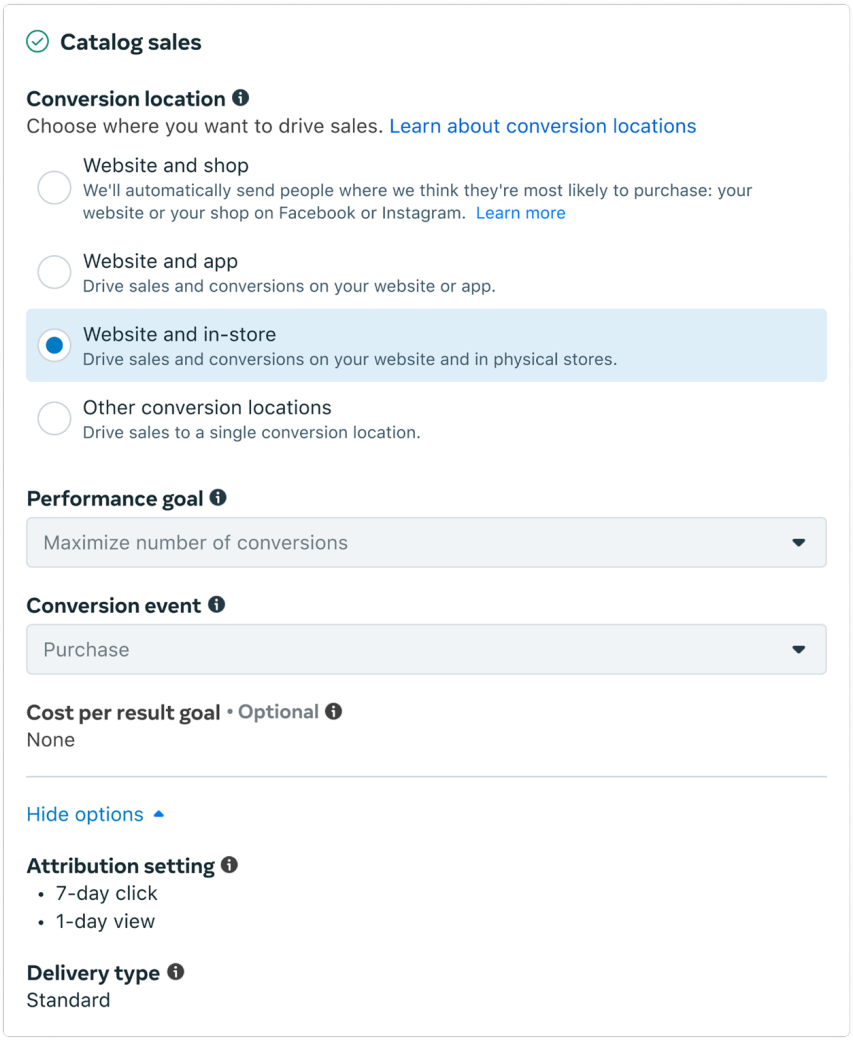
b) **Conversion event** will be defaulted to **Purchase**. *At this time, purchase is the only conversion event available.*

c) Leave **Cost per result goal** empty.

d) **Conversion event** will be defaulted to **Purchase**. *At this time, purchase is the only conversion event available.*

e) Under **Show more options**, the **Attribution setting** will be defaulted to 7-day click, 1-day view. *At this time, 7-day click, 1-day view is the only setting available.*



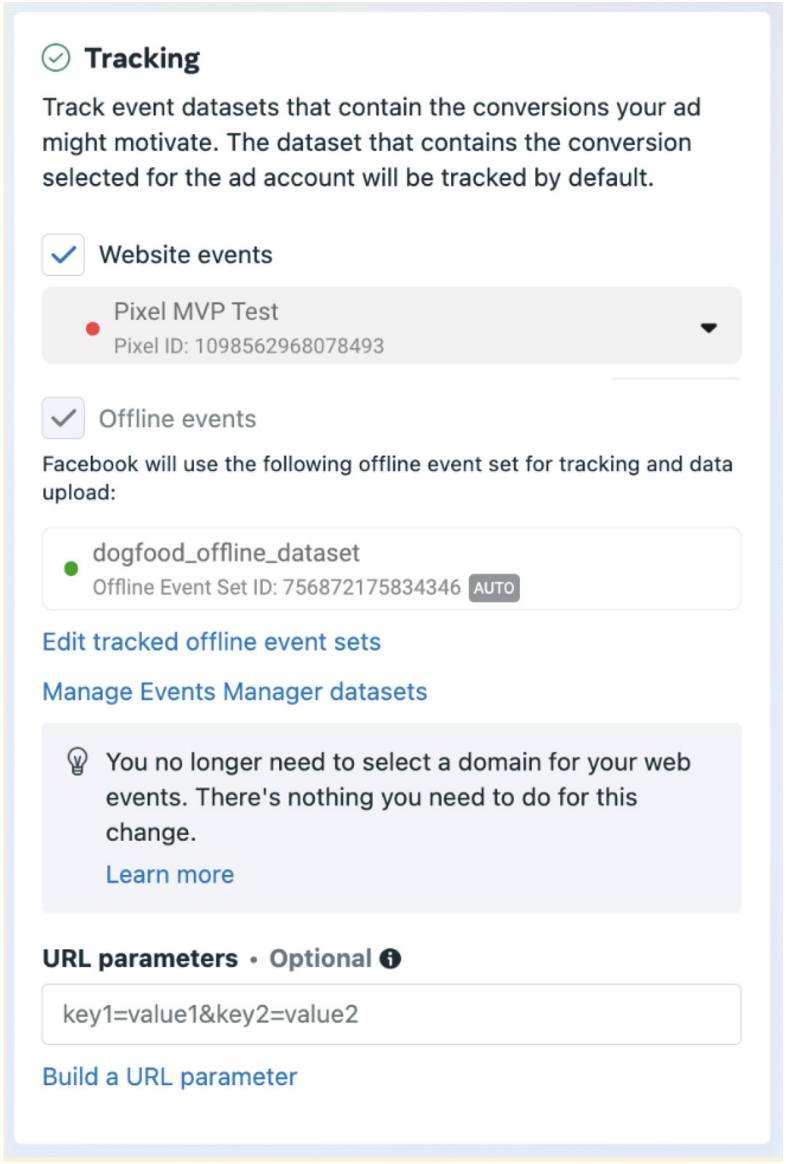


7

On the ad level:

a) Set up your ads as you normally would.

b) Under **Tracking,** select your **Pixel** and **Offline events** (can be an offline event set or dataset).



Reporting

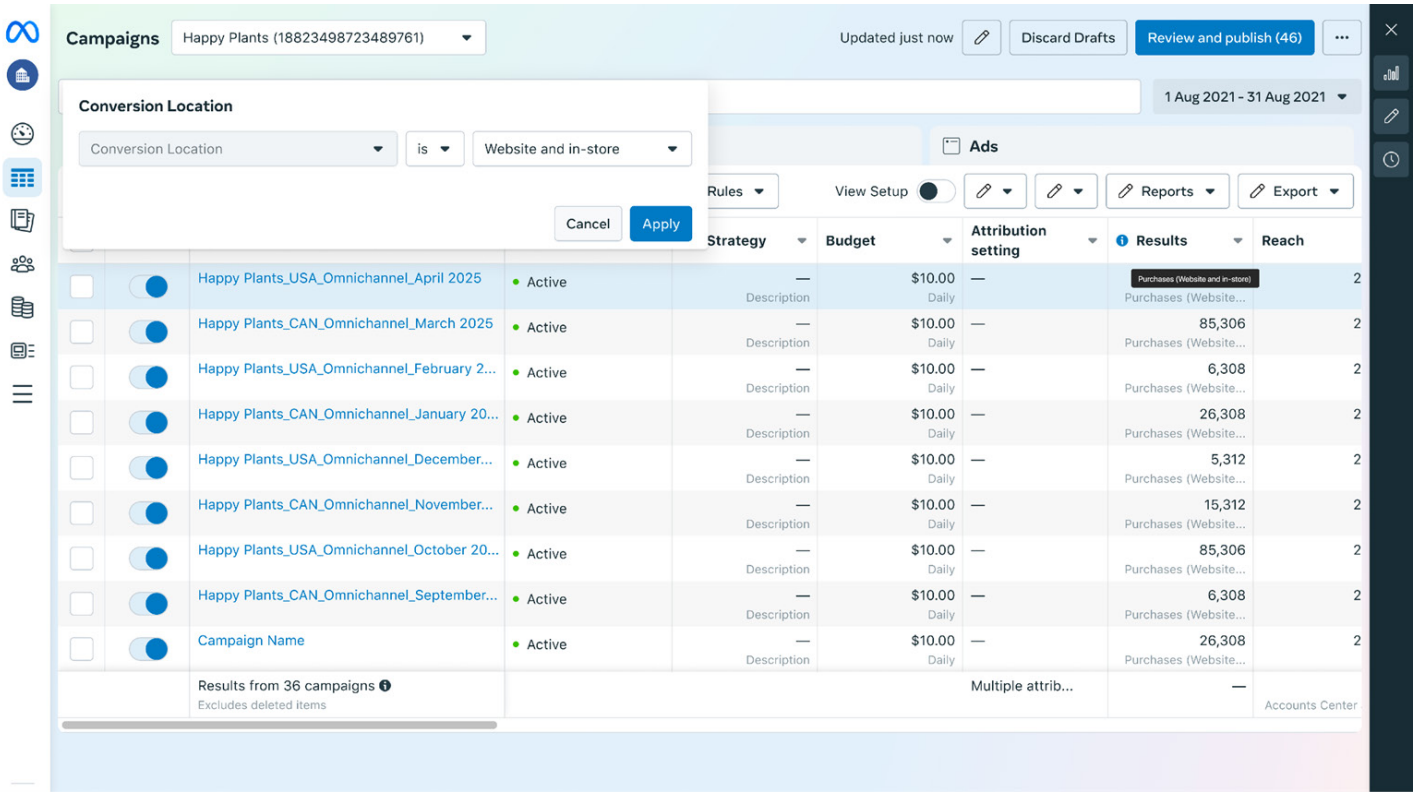
To view the results of your omnichannel campaigns on Meta, follow the same steps that you'd take to view results for other types of campaigns in Ads Manager or Ads Reporting.

Filter by campaign

- In Ads Manager or Ads Reporting, you can filter campaigns by conversion location. For omnichannel ads, this will be **Website and in store**.

Use the Results column

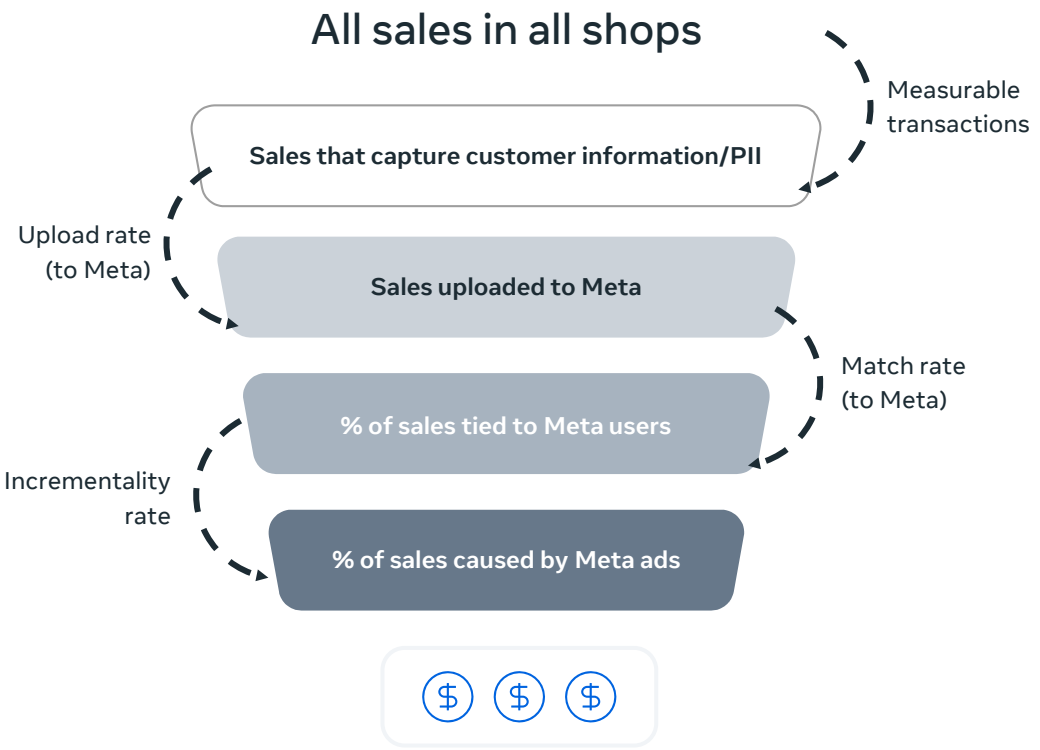
- Under the Results column, your omnichannel campaigns will display data for **purchases (website and in store)** with a breakdown of all results.



Accounting for missing store conversions in lift and Ads Manager reporting

Find the percentage of shops sales that you pass to Meta to ensure accurate measurement and optimisation. With that info, you can apply a factor up to your offline sales based on your shops PII capture rate.

Why: If your omnichannel campaign performs on par with a website-only campaign, it means that your omni campaign won because the offline events measured do not reflect 100% of shop sales, and omni drives outsized shop sales impact.



Interpret lift as a lower bound of incrementality: When using single-celled lift to calibrate or report on performance, use the point estimate as the most conservative estimate of Meta impact as:

- Conversion lift is already a conservative estimate of Meta's impact, as it only measures the marginal gain due to Meta ads within your marketing mix and not Meta's impact in absence of other ads.
- Some conversion data might be missing from lift due to known gaps (e.g. shop data coverage depending on customer info capture rate), further lowering offline lift or attributed reporting that we can measure.

To learn more about sharing PII-less data with Meta, contact your sales team.

Upscaling conversion lift and offline attributed results: Another way to account for conversion gaps is for your internal analytics team to conduct the following analyses:

- Estimate the percentage of missing data based on your understanding of the business (e.g. if X% of your offline sales are not captured).
- Apply this percentage to the lift estimate (e.g. if 20% of conversions are expected to be missed and lift is 160, divide 160 by (100% + 20%) gives you the final estimate of 200.

Caveat: Measurable conversions might differ from unmeasured conversions (e.g. loyalty members vs non-loyalty members). Upscaling observed lift and attributed numbers necessitates a combination of data and your intuition as a marketer.

FAQs/limitations

If you encounter any difficulties or have questions, please contact your Meta representative. We'll be happy to help with any part of this setup.

Can I create an Advantage+ shopping campaign?
Yes, you can use omni optimisation for a manual sales campaign setup, an Advantage+ shopping campaign setup or Advantage+ catalogue ad campaign setup.

Can I use a catalogue or create Advantage+ catalogue campaigns?
Yes, you can create an Advantage+ catalogue campaign with omnichannel ads. The catalogue that you select must have one singular dataset (with web and offline events) connected to it, and you can set this up in Commerce Manager.

Can I optimise for app conversions?
At this time, app optimisation is available in Beta for omnichannel ads within an Advantage+ catalogue ad setup; contact your Meta representative for more information. In the meantime, you can measure app sales using ad-level tracking.

How long can I run a campaign?
You can run an omnichannel campaign for any duration, but at this time, we recommend running your campaign for at least seven days so that it's more likely to exit the learning phase.

Can I bid more for website conversions or in-store conversions?
Yes, you can tell our system that you want to bid more for either website or in-store conversions by going to Advertising settings > Conversion location value rules. Note that you are likely to get more outcomes from your preferred conversion location, but your overall cost per result may increase.

Can I use multiple datasets or data sources in a campaign?
Yes, but we recommend using one dataset that receives both website and offline data in your omnichannel campaigns.