Work with Global Templates

⚠️ **New Name: Marketing Cloud Personalization**

Interaction Studio (formerly Evergage) is now known as Marketing Cloud Personalization. The new name reflects our mission and vision for innovation in Salesforce Marketing Cloud. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in various places until we replace it.

Global Templates are provided with your Interaction Studio account. While they need some configuration by a developer to work in your account, they provide an "out-of-the-box" framework for web campaign templates you can use to deliver personalized experiences and activation campaigns to web site visitors.

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This article details the global templates available in Interaction Studio and where to find them.	- Available Global Templates - Find Global Templates

Available Global Templates

New global templates are being developed and released regularly to meet a variety of use cases. The table below provides an overview of the standard configuration for each template, but the templates available for you to use to create a web campaign may differ in name and configuration options based on modifications made by the developer who customized each template for your site. Since each global template is just a starting point, your developer can make modifications to the ones in your site as needed to support your needs.

Each template has comprehensive documentation in the template itself so your developer will know what configurations are possible and how to make them. For example, with the Exit Intent with Email Capture template, a developer will need to create the attribute for the email address captured in the web campaign field. The instructions for doing this are included in the template for easy reference.

In addition, your developer will find documentation on using and building templates in the Interaction Studio developer documentation site.

Template Name	Sample Use Cases	Sample Template Customization Options
Banner with Call-To-Action	- Homepage Hero Banner Personalization based on affinity segments - Landing page lifecycle targeting with dynamic CTA based on lifecycle state - Loyalty program registration for non-members - Leverage 3rd party data to target prospects	# of CTA's - Text / CTA Location - Banner Size - Banner style (Flat image vs layered)
Einstein Product Recommendations	- Trending product recommendations on the homepage to entice engagement from first time visitors - Facilitate additional product discovery through co-browse recommendations on PDP pages & increase cart size with co-buy recommendations on the cart page	- Number of recommended items (products) - Style of recommendations - Location of recommendations based on mapped content zones
Einstein Content Recommendations	- Trending content recommendations on the homepage to entice engagement from first time visitors - Next best content recommendations to entice deeper engagement on blog/article pages	- Number of recommended items (content) - Style of recommendations - Location of recommendations based on mapped content zones
Google Analytics Segment Push	Pass audience segments to Google Analytics	Limited default options due to specificity of template

Exit Intent	• Recognize classic exit intent (mousing towards top of the page) and recapture customer interest with a call to action or offer/discount	• Number of calls to action • Text/CTA location • Pop-up image style (flat or layered) • Pop-up contents (recipe inclusion)
Exit Intent with Email Capture	• Turn anonymous visitors into known customers and extend the number of channels on which you can communicate with them by strategically timing when to ask for their email • Progressively profile customers by asking for different attributes based on information already known about the customer (eg. ask for phone number if emailAddress attribute already exists on the profile)	• Text/CTA location • Pop-up image style (flat or layered) • Attribute collected
Infobar with Call-To-Action	• Major announcements (i.e. display COVID-19 updates to global audiences) • Sale or promotion announcements (i.e. promote free shipping thresholds or seasonal sales) • Upcoming event/webinar registration with registration link	• Number of calls to action • Infobar styling
Redirect	• Redirect web visitors to another page **NOTE:** If there are any campaigns published on the pages that are being redirected away from that the individual qualifies for, impression stats *MIGHT* still be registered for these campaigns, despite the redirect.	--
Infobar with User Attribute & Call-To-Action	• Infobar with a visitor's name and call-to-action (CTA) • Infobar with a visitor's company name and call-to-action (CTA)	• Number of CTA's • User attribute leveraged (default is visitor's name) • Text & background color/styles
Slide-In with Call-To-Action	• Target customers/prospects with an attention grabbing slide-in message that includes a call-to-action (CTA) • Select from a variety of trigger options to determine when the message should appear, including time on page, scroll depth, and inactivity	• Number of CTA's • Text & background color/styles • Slide-in location & speed
Einstein Decisions	• Machine learning driven Next Best Offer decisioning	• Number of promotions returned
Manual Promotion Selector	• Rules based promotion targeting	• Number of promotions returned
chatbot	• Trigger the chatbot to appear when a person spends more than 1 minute on an application page • Trigger the chatbot to appear when someone scrolls down 50% of an FAQ page • Suppress the chatbot from appearing for customers with an open support case	• Who should qualify to see the chatbot (campaign/experience targeting rules) • When the chatbot should appear based on factors including time on page, inactivity, and scroll depth • Integrates with the Salesforce embedded chatbot (default), but can be configured to work with a different chatbot in a similar manner

Find Global Templates

> ⚠ **Permissions Required**
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> Your Interaction Studio user account must be assigned a role that includes Template View permissions at a minimum to be able to see Global Templates. If your user account is not assigned a role with Template Create/Edit permissions, you will not be able to clone a Global Template. If your user account is not assigned a role with Template Publish/Delete permissions, you will not be able to publish a Global Template.

1. Navigate to your website
2. Enable the Salesforce Interactions SDK Launcher Chrome Extension, entering the account and dataset configured for the site if not autofilled
3. Enter your login credentials (ask your account administrator if you are not sure):
    a. Your Marketing Cloud username and password if your account was provisioned through Marketing Cloud and this is how you typically access Interaction Studio
    b. Your Interaction Studio username and password if your account was provisioned through Interaction Studio
4. Click **Templates** > **View List**
5. From the Templates window, select the *Global Templates* tab
6. Click **Clone Global Template** to clone a template. This will create a copy of the template so you can have a developer customize it for your site. Documentation for each template is included with the template