PART 3 OF 3 · HOW, WHY AND WHEN

Personalisation — The Rule Builder in Full

The same seven steps with the reasons behind them · every rule type, what it tests, and how several rules combine

1 · Four starter audiences — Copy one to get started

This is the screen you land on.

Audiences

CREATE NEW AUDIENCE | TEST PERSONALIZATION | VIEW ENABLED WIDGETS

Existing Audiences
These are yours and every sibling site's. Each row has Edit, Copy and Delete, and Delete works only while Usage Count is 0.

Starter Audiences — read-only. [Copy] is the only action on the row.

Returning Visitors	New/Returning equals Returning
Visitors Delivered to Reservation System	Delivered to Booking Engine equals Yes
Visitors from Social Networks	Referring Website contains 12 domains — t.co, not x.com
Visitors on Mobile Devices	Device Type equals Mobile

Two ways in — and one of them skips a step

[Copy] a starter
The duplicate lands in Existing Audiences with its rule already built. Click Edit on it and you are standing in the rule builder.

[CREATE NEW AUDIENCE]
Name and Description only — no rule sections, and no SAVE button. QUICK SAVE, and the CMS reopens the record in Edit mode. Rules live there.

Either way, the rule builder is an Edit-mode screen.

Copying a starter does not reserve its name
Visitors on Mobile Devices exists twice more on this domain as ordinary audiences, same rule. Reporting is keyed by the audience NAME, so duplicates split the reporting key silently — read the list before you copy.

One audience, every site on the domain
Creating one publishes it into every sibling site's list under the same domain, and Usage Count adds up across all of them. Prefix a throwaway with TEST-.

2 · Each audience can carry one or more rules — the saved stack, and the panel you build the next one in

Audience Rules

These are the rules you have saved: none, one or many.

1. **Visitor Device Type** — Delete
[equals ▾] any of these: Mobile Delete

2. **Visited Pages** — Delete
[equals ▾] any of these: Dining Delete

When the audience has no rules, this panel reads: "No Audience Rules Found. To add a rule, go to the 'Add Audience Rule' section below."

[Add Rule] moves it up here ←

Add Audience Rule

This panel is always on screen; nothing opens it.
Nothing is saved until you click Add Rule. Leave the screen first and the rule is gone.

3.
Rule Type (?) Select a Rule Type ▾

ADD RULE — This saves the rule — see step 5.

A saved rule stays editable — except its type
The panel is a real form. Its operator, its value inputs and its per-value Delete links are all live where they sit. Change one and press SAVE.

Only the Rule Type is fixed once committed. To change that, delete the rule and add a new one — but deleting renumbers the rest, which matters to any Custom Rule Logic expression that names them. Editing in place keeps the numbering, so prefer it.

Zero rules is a valid audience that matches nobody
Its rule logic is empty, so it never evaluates true — and no screen warns you. An audience with a Usage Count that never fires: check it actually has a rule.

3 · Select a Rule Type — 13 types → that type's form swaps into the staging panel, in place

No page reload — every rule type's form is already in the page and is simply shown or hidden. A–G are the seven cards below, grouped by the value control you get; underneath them sit only three real sub-forms — the value-list builder (10 types), a binary dropdown (2) and Distance (1). A–G are NOT the dropdown's own four option groups, which are Visitor Behavior · Visitor Device · Visitor Geography · Visitor URL.

A · Geography
City · State · Country
[equals ▾] any of these: → Search for a City → ADD CITY
Country is free text — a typo never matches.

B · Device / Language
Device Type · Language
[equals ▾] any of these: → Desktop → ADD DEVICE TYPE
English and English (UK) both mean en.

C · Referring Site · Campaign
single text input
[contains ▾] any of these: → example.com → ADD REFERRING WEBSITE
Referring Website: contains only. Campaign: 6 operators.

D · URL Parameter · Cookie
Name + Value (6 operators)
Name → Value → ADD URL PARAMETER VALUE
The operator applies to the value, not the name.

E · Visited Pages
site page-tree dropdown
[equals ▾] any of these: → Select a Page → ADD VISITED PAGE
Domain | Site | Page list — this site's pages only.

F · Distance from Location
between [ ] and [ ] miles
Latitude [ ] Longitude [ ] → Preview Distance
No value list. Test it with latitude and longitude.

G · Binary types
New/Returning · Delivered to Res. System
Returning ▾
No operator, no Add button. Two states means two rules.

F & G stage nothing — go straight to 5.

4 · ADD [TYPE] stages ONE value — nothing is saved yet

Visitor City [equals ▾] any of these:

dublin | ADD CITY

City | Delete → "No City values have been added."

The values list sits inside the staging panel. Repeat per value; values in one rule are OR-ed.

Three operator sets, not two
equals · does not equal
Country · State · City · Language · Visited Pages · Device Type
contains · does not contain
Referring Website — and nothing else
+ contains · starts with · ends with
Campaign · URL Parameter · Cookie

5 · [Add Rule] — this is the save

ADD RULE — **Banner: "Audience Rule Successfully Added."**
The rule moves up into Audience Rules, and the staging panel empties and renumbers itself.

Nothing staged? Refused: "All audience rules must have a value."

More rules?
Yes → back to the same staging panel, now numbered {n+1}
No → continue to 6

6 · Combine — how the stacked rules evaluate

By default, a visitor must match every numbered rule.

☑ Use Custom Rule Logic → **(1 OR 2) AND 3**

Add order is not significant — the implicit AND reads the same in any order. The numbers bind only under Use Custom Rule Logic, which is what the expression points at.

The expression names rules by number, and the field sits above the rules. Deleting a rule it names → Try Delete Again / Cancel Delete. A delete also renumbers the rules below and rewrites the expression — re-read it.

7 · SAVE / QUICK SAVE — properties, plus any in-place rule edit

SAVE | QUICK SAVE

Name · Description · Custom Rule Logic — plus any field you changed in a saved rule's own panel. Returns to the audience list.

Rules committed in 5 are already saved; neither button is needed to keep them. But if you EDITED a saved rule in place, this is the press that persists it.