BOOKASSIST WEB PLATFORM

Personalisation Cheatsheet

Focus: Showing different visitors different content, and getting it right first time

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📎 **KB Article:** How to Use Targeted Personalisation

Personalisation swaps the content *inside* a widget you already have — a headline, an image, a button — for visitors who match a rule you write. Everyone else keeps seeing the original.

💡 **Read this first.** Running a test makes your own browser a member of the audience you tested, for 30 days. From then on your normal window shows you the targeted content wherever you are and whatever device you are on. Do every check in a fresh private window.

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🧩 The Three Parts

Part	What it is	Example
Audience	A named group of visitors, defined by one or more rules	Visitors on Mobile Devices
Replacement	The alternative heading, image or button that audience sees	A shorter headline and a one-tap booking button
Order	Which replacement wins when a visitor matches several	The list order inside the widget — top one wins

Two things to settle before you build anything:

- **Start with one to three audiences.** New visitors, booking-engine abandoners, mobile visitors and campaign traffic are the strongest openers.
- **Check the widget can do it.** Similar names are no guide — **CTA Carousel 1.0** takes a replacement and **CTA Grid Carousel 1.0 (Premium)** does not. In the widget picker, anything listed under the **Personalization** category supports it. For a page you already have, go to `Website → Personalization` and click **[VIEW ENABLED WIDGETS]**.

👥 Build an Audience

Path: `Dashboard → Website CMS → [Domain] → Website → Personalization`

1. Click **[CREATE NEW AUDIENCE]**, type a name, click **[QUICK SAVE]**. This opens the Edit Audience screen, where rules live.
2. The **Add Audience Rule** panel is already on screen. Pick your **Rule Type** from the dropdown.
3. Choose your value — a device, a country, a domain — then click the panel's own **ADD [TYPE]** button (**ADD DEVICE TYPE**, **ADD COUNTRY**, and so on). Repeat for each value you want.
4. Click **[ADD RULE]**. Your rule moves up into the **Audience Rules** list, and the panel empties for the next one.
5. Add more rules the same way. Several rules on one audience mean the visitor must match all of them. For "either or", tick **Use Custom Rule Logic** and write an expression with the rule numbers, such as `(1 OR 2) AND 3`.
6. Click **SAVE** to store your changes and return to the list.

PART 2 OF 3 · HOW TO BUILD ONE

Personalisation — Building an Audience Rule

Seven steps to follow while you work · and which of the two buttons actually saves the rule

1 Start from a ready-made audience
Copy one, or create your own

Four ready-made audiences sit at the bottom of the Audiences screen. Copy the one that fits and it arrives with its rule already made.

None of them fit? Click CREATE NEW AUDIENCE, give it a name and click QUICK SAVE — the rule section appears once the audience exists.

2 Choose the rule type
Pick from the Rule Type list

The Add Audience Rule section is already on the page, waiting. You do not need to open it.

3 Fill in the detail
Choose or type what you want to match

For a device rule, pick Mobile. For a city rule, search for the city.

4 Add it to the rule
ADD DEVICE TYPE, ADD CITY, ADD PAGE...

This puts your choice into the rule you are building. Repeat it for each extra value you want to match.

5 Save the rule
Click ADD RULE

Your rule moves up into the Audience Rules list and is saved. The panel empties, ready for the next one.

6 Add more rules if you need them
A visitor has to match every rule

Add them in any order you like — a visitor has to match them all, and that reads the same either way.

For an either/or audience, tick Use Custom Rule Logic and write it out by rule number: (1 OR 2) AND 3. That is the one place the numbers matter.

7 SAVE the audience
The name, and any rule you changed

Rules you added in ⑤ are already saved. SAVE stores the name and description — and any change you made to a saved rule — then takes you back to the list.

Two buttons, two jobs

ADD DEVICE TYPE (or ADD CITY, ADD PAGE, and the rest) puts one value into the rule you are building.

ADD RULE saves the finished rule.

Miss the first and the second is refused, with a message telling you the rule needs a value.

Changing a rule you already saved

You can change a saved rule — except its type. Its value and its operator stay editable where they sit: change them and click SAVE.

Only the rule type is fixed. To change that, delete the rule and add a new one — and deleting has a knock-on effect.

Deleting a rule renumbers the ones below it and rewrites your Use Custom Rule Logic expression. Read it again afterwards and check the numbers still mean what you meant. Editing a rule in place leaves the numbering alone, which is why it is the safer way to make a change.

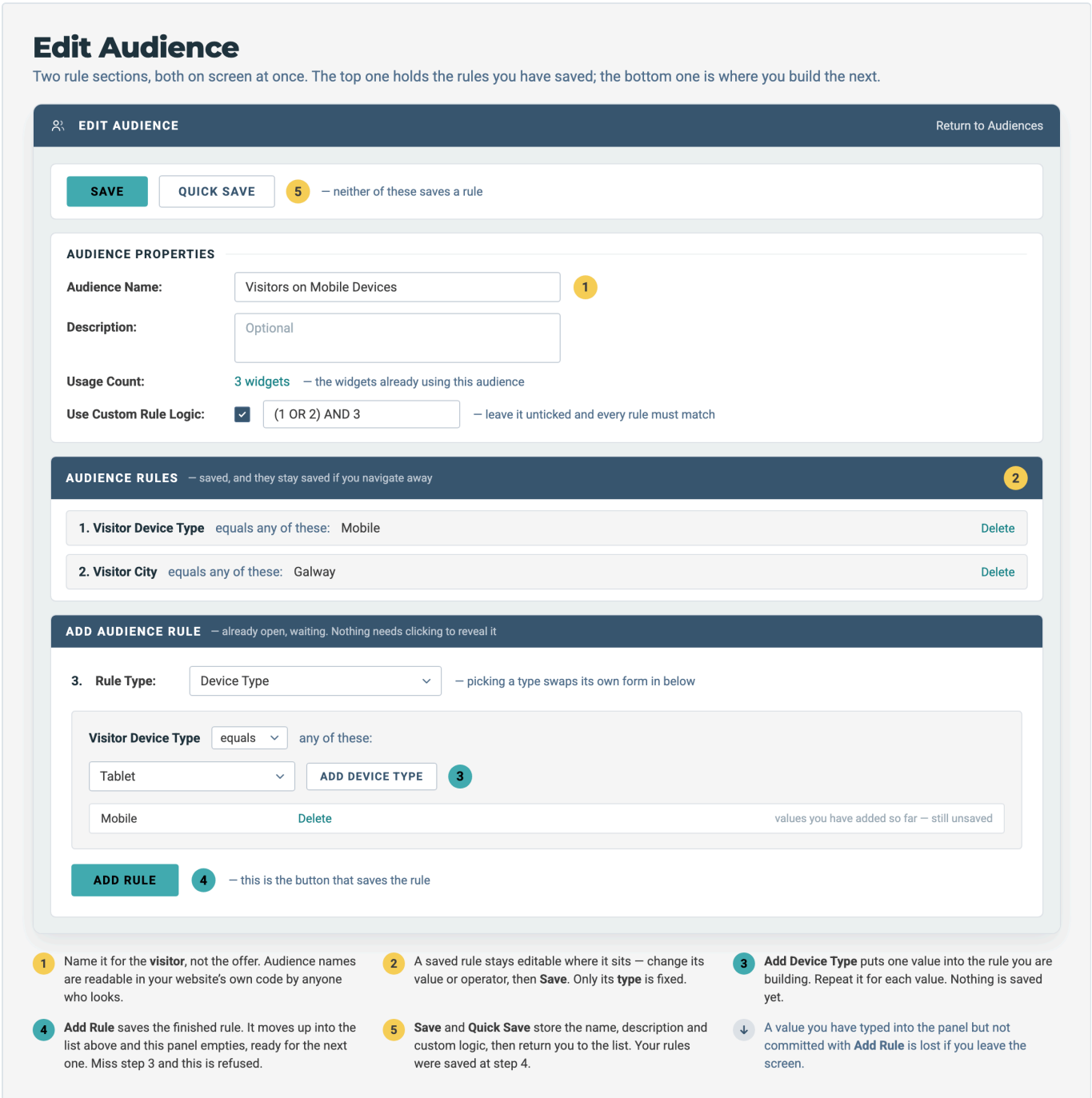
The same steps as a picture, with the two buttons that are easiest to confuse set side by side.

Four things worth knowing before you start typing:

- **Two clicks, two jobs. ADD [TYPE]** puts a value into the rule you are building. **[ADD RULE]** saves the finished rule. Miss the first and the second is refused with a message telling you the rule needs a value.
- **You can change a saved rule — except its type.** Its value and its operator stay editable where they sit: change them and click **SAVE**. Only the rule type is fixed. To change that, delete the rule and add a new one — and see the next point, because deleting has a knock-on effect.
- **The order you add rules in does not matter.** With several rules the visitor has to match all of them, and "all" reads the same in any order. The numbers matter only if you tick **Use Custom Rule Logic**, because they are what your expression points at. Deleting a rule renumbers the ones below it and rewrites that expression, so read it again

afterwards and check the numbers still mean what you meant. Editing a rule in place leaves the numbering alone, which is why it is the safer way to make a change.

- **Name the audience after the visitor, not the offer.** Audience names are visible in your website's code to anyone who looks, so `Visitors from Condé Nast Traveler` is safe where `Condé Nast 15% Rate` puts your commercial arrangements on public view.



One screen, two rule sections. The top list is what you have saved; the panel underneath is where the next rule is built, and **ADD RULE** is the button that moves it up.

Shortcut: four audiences are pre-built and ready to **Copy** — Returning Visitors, Visitors Delivered to Reservation System, Visitors from Social Networks, and Visitors on Mobile Devices. Copy one instead of rebuilding it.

Audiences are shared across every website on your domain, language versions included. Check the list before you create one — a sister site may already have it.

📏 The Rules You Can Write

Rule type	What it tests	Worth knowing
Referring Website	The site the visitor arrived from	Bare domain only — no `http://`, `https://` or `www`. Build these around magazines, guides, blogs and partner sites, which link out to you. The big travel-booking sites do not, so a rule naming one never matches
Campaign	A tracking code in the link	Codes come from your tracking-code list. For links tagged with UTMs, use **URL Parameter** instead
URL Parameter	Any `key=value` added to the page address	Good for email and paid links you build yourself
Country / State / City	Where the visitor is, from their connection	
Distance from Location	A range in miles from a point you set	It is a ring, not a circle: visitors closer than the start distance are left out. Set the start to 0 for a plain radius
Device Type	Desktop, Tablet or Mobile, from screen size	Shrinking a desktop browser window does not make it read as Mobile
New/Returning	First visit or a return visit	
Visited Pages	Pages the visitor has looked at	Counts this visit *and* earlier ones, so it carries long-term interest — spa, meetings, weddings
Delivered to Reservation System	Whether they reached the booking engine	The abandoner audience
Language	The visitor's language setting	Matched on the language alone — one rule for English covers British, Irish and US English together
Cookie	A named cookie and its value	

For social traffic, use `t.co`. X wraps outbound links in its own shortener, so `t.co` is what arrives as the referrer; a rule on `x.com` matches almost nothing.

🎨 Apply It to a Widget

Personalisation always works on the individual item inside a widget — one slide, one card, one intro entry, one modal window — never the widget as a whole. It can only change fields the widget already has: you cannot add an image to a text-only block.

Control	Where it is	What it does	Use it when
Add Replacement	On the item's row in the list (shown as **Replace** on Hero Carousel)	Copies the item as a targeted variant nested underneath. The original stays live for everyone else	Almost always — other visitors still need the default
Select Audience	Inside the item's editor, in the **Personalization** panel at the top	Ties the open item to one audience, so only they see it	Content nobody else should get, such as a referral-only popup

The build, in order:

1. Hover the widget label on the canvas and click **Edit**.
2. Find the item you want to target and click **Add Replacement** on its row.
3. Open the new replacement, write the targeted heading, image and buttons, and click **Save**.
4. Re-open the replacement, and in the **Personalization** panel click **Select Audience** and pick your audience. That choice saves itself — there is no second save.
5. Repeat for the other items you are targeting, then publish the page.

⚠️ The Three Traps

1. A replacement with no audience shows to everyone. It is not a harmless draft — it takes the original's place for every visitor. And you cannot avoid the gap: **Select Audience** only works after the replacement has been saved once. So save it, bind the audience straight away, and do not publish in between. If you have to stop halfway, delete the replacement and start again later. Before publishing, check that every replacement on the page names an audience — a bound item carries a person icon, and hovering it shows the name.

2. Clicking Select Audience on the original hides it from everyone else. If all other visitors still need content, use **Add Replacement** and bind the audience to the copy instead.

3. Order is priority. When one item carries several replacements, the first one from the top that matches the visitor wins and the rest are ignored. Drag them into order with the handle at the left of each row — most specific first: campaign and referral, then behaviour, then device, then location.

🧪 Test Before You Publish

The Page Editor always shows the default content, so the editor cannot tell you whether this worked.

1. Go to `Website → Personalization` and click **[TEST PERSONALIZATION]**.
2. Set **Preview or Live Website**, and set **Page** to the page your widget actually sits on.
3. Fill in **only** the fields that match your audience's rules. Every field you fill is added to the test, so an extra one stops it matching.
4. Click **[Test Personalization]**. Your page opens in a new tab as that visitor.
5. Open a fresh private window and load the page as an ordinary visitor. The default content must still be there.

To test	Fill this field	Entered as
Mobile visitors	**Visitor Device Type**	Select `Mobile`
Campaign traffic	**Visitor Campaign**	The tracking code
A country	**Visitor City**	Type a city, then pick an entry whose **first** segment is your country — `United States – New York – Wayland`
A referral	**Visitor Referring Website**	The full address, `http://www.cntraveler.com`
Returning visitors	**Visitor New/Returning**	Select `Returning`
Booking-engine abandoners	**Visitor Delivered to Reservation System**	Select `Yes`
Page-based interest	**Visitor Visited Pages**	Select the page, then click **ADD PAGE**

The rule takes a bare domain and the test field takes a full address. That difference is deliberate.

📱 Checking It on a Phone

Three tools, and each one proves something different.

Tool	Where	What it proves
[TEST PERSONALIZATION], with **Visitor Device Type** set to `Mobile`	`Website → Personalization`	The audience, the rule and the replacement are wired together
The **Size** selector — Fullscreen, Mobile, Tablet or a size you type in	**Page Preview** from the Page Editor, or **[PREVIEW WEBSITE]** on the publish screen	How the page reflows at a narrower width — wrapping text, cropped images, columns stacking
Get Mobile QR Code	Alongside the **Size** selector, in either of those	The whole thing on real hardware. The test window tells the page which device you are on; a phone lets it work that out for itself, which is what a real visitor gets

These are two separate windows, and neither does the other's job. The test opens your page on its own, with no controls around it — there is no **Size** selector or QR button to reach for once it is open. The preview windows have both, and show you the page as yourself rather than as the visitor you simulated. So check the rule in the test window, then open **Page Preview** for the layout.

A narrow window is still a desktop. A **Device Type** audience reads the size of the screen the visitor's device has, not the size of the window they are looking through. Narrowing **Page Preview** — or your own browser — reflows the layout but leaves the desktop content in place, so a page that looks unchanged at 360 pixels wide has not failed the test.

🚀 Publish

Saving stages your work; nothing reaches visitors until you publish. This includes audiences — if you change an audience's rules, publish the site, not just the page.

1. **Page Editor → Publish.**
2. If a warning says colleagues have unsaved changes, review them, tick **Confirmed**, and click **Continue**.
3. Click **[PREVIEW WEBSITE]** for a last look, then **[PUBLISH WEBSITE]**. For several language sites at once, use **[PUBLISH MULTIPLE WEBSITES]**.
4. Check the live site in a fresh private window.

🔗 Booking Links in Replacement Content

Send targeted visitors straight into a specific rate rather than a blank calendar. Paste your parameters into the **Include URL Parameters** field on the button.

- Start the string with `?`, then join the rest with `&` — `?price_group=128&adults=2&nn=2`. A string starting with `&` is ignored and loads an empty calendar.
- `price_group` takes the numeric rate ID, not a promo code. You cannot look it up yourself — ask support to set the package up, then ask them to send you its price group number.
- Useful additions: `&nn=` nights, `&adults=`, `&rms=` rooms, `&date_in=` in `YYYY-MM-DD`.

Full list: How to Add a Booking Link.

📈 Measuring It

Find out what your site can report before you promise anyone figures. Where an Adobe report suite is connected, impressions and clicks are counted per audience automatically, keyed by the audience name — which is why unique names matter. Where the site runs on Google Analytics alone, those figures are not collected, so measure the campaign on bookings, room nights and revenue over its run, compared with the period before it. Ask whoever manages your website which one you have.

🔧 Quick Fixes

What you see	What to do
"No Device Type values have been added"	You picked a value but did not click **ADD DEVICE TYPE**. Pick it again, click the button, then **[ADD RULE]**
No **Personalization** section in the widget editor	You are on the widget itself. Click **Edit** on the individual slide, card, intro entry or modal window
Select Audience does nothing on a new item	It works only after the first save. Save the item, re-open it, then bind the audience
The replacement shows to everybody	It has no audience. Open it and use **Select Audience**
The default content vanished for most visitors	**Select Audience** was used on the original. Remove the audience from it, then use **Add Replacement** instead
The wrong audience's content appears	Two replacements match. Drag the one you want to the top
The test shows default content	A field that is not part of the rule was filled in. Clear it and run again, or check you tested the page the widget is on
Mobile content stays hidden when you narrow the window	Expected — the rule reads the device's screen, not the window. Use the simulator or a phone
No **Size** or QR controls on the page the test opened	They belong to **Page Preview**. Open that from the Page Editor for anything to do with layout
Preview shows you the targeted content when it should not	You joined that audience when you tested. Open a fresh private window
A rule change made no difference live	Publish the site after changing an audience
The **Delete** link is missing on an audience	It is still in use. Remove it from the replacements using it, and the link comes back

📚 Where to Go Next

Need	Go to
Choosing and ranking audiences before you build	Phase 1: Plan
The full build, with screenshots	Phase 2: Build & Apply
Every test field and how to read the results	Phase 3: Test & Validate
Publishing and tracking performance	Phase 4: Publish & Monitor
Six worked campaigns you can copy	Use Cases
Blank planning charts and worksheets	Planning Templates
The whole workflow on one page	Personalisation Overview
Which widget to use for the job	Widget Reference Guide

The rest of the set:

- Essentials — every screen you use day to day, with a picture of it
- Quick-Start Cheatsheet — signing in, the widget label and publishing safely
- Widget Reference Guide — which widget to reach for, grouped by the job you are doing
- Forms Cheatsheet — enquiry forms, who gets the email, and reading what comes in

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If you have any questions or need a hand, email support@bookassist.com. That opens a support ticket, and someone will come back to you.
