

# Personalisation How To



## Requirements

This feature must be switched on for your site by [Commerce Vision](#).

## Overview

Everyone loves it when something is customised *just* for them. Offering relevant content through personalisation builds loyalty, strengthens customer relationships, and can drive sales. Tailor the content on your website to the individuals who use it. With your users' preferences in mind, you can display promotions, targeted messaging, and product suggestions.

This guide will walk you through Personalisation in the Commerce Vision CMS.



Please note that guest user behaviour is not tracked until version 4.09+. From this version onward, a guest user cookie will be added which allows guest actions to be logged and Personalisation rules to be applied.

## In this guide

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## Prerequisites

Please ensure that you meet the prerequisites below!

## Rule Maintenance

Navigate to **Advanced Content Personalisation**. The Rule Maintenance page contains all personalisation rules for your site.

You can see existing rules (if you have any), or create a new rule from this screen.

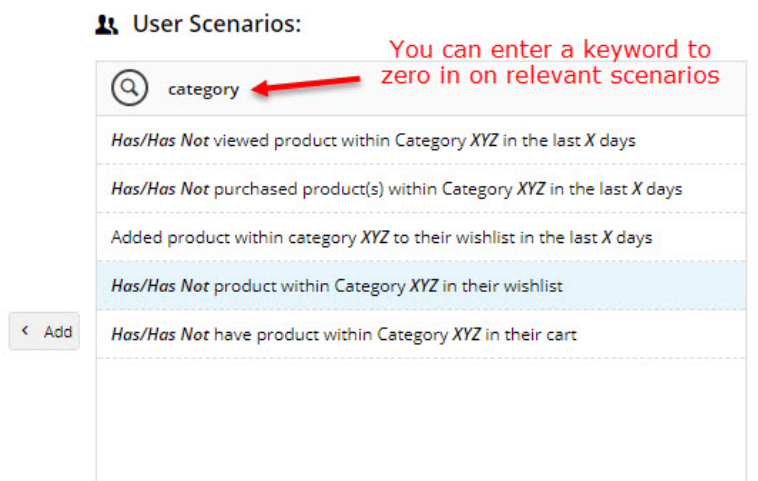
👤 Currently has Fitness products in Favourites list	Applied 1 time	Edit	Options
👤 Does not have CV100 in wishlist	Applied 1 time	Edit	Options
👤 Has \$x or less in cart	Applied 1 time	Edit	Options
👤 Has paper in shopping cart	Applied 1 time	Edit	Options

For an overview of all the available rule scenarios, see our guide to [Personalisation Rules](#).

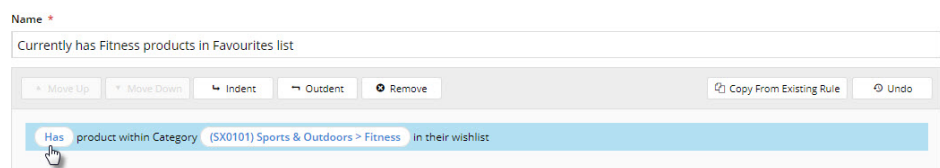
## Create a Rule

Let's say we're running a promotion on fitness equipment, and we want to target users who have these products in their Favourites / Wishlist.

1. On the [Personalisation - Rule Maintenance](#) page, click **Create New Rule**.
2. In **Name**, enter a meaningful name for your rule. Be descriptive - the name might help you easily locate your rule among a long list one day!
3. In **User Scenarios**, select a scenario from the list. You can also enter a search term to filter results by keyword.



4. To add the scenario, double-click the scenario or highlight it and click **Add** to add it to the rule builder.
5. Set the value of each variable in the scenario:
  - some variables have 2 options that you can click to select (has/has not, more/less, etc.)
  - other variables will have a popup where you can define the value (such as a product code, number of days, dollar amount, etc.)



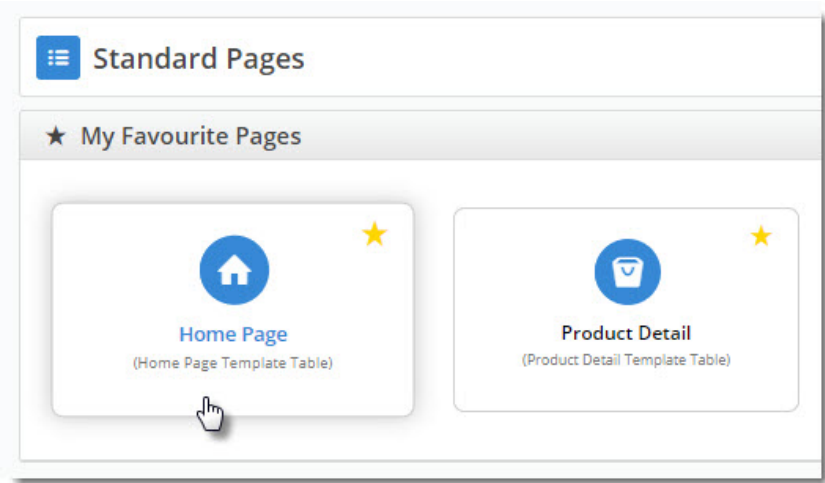
6. Repeat steps 3 - 5 if your rule will be built from multiple scenarios.
7. Click **Save** or **Save and Exit**.

You can see an example in the video below:  
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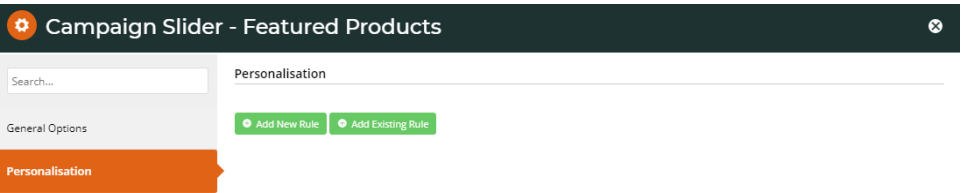
# Apply a Rule to a Widget

Now that our rule is created, let's personalise a widget with it. A campaign slider full of fitness products sounds good.

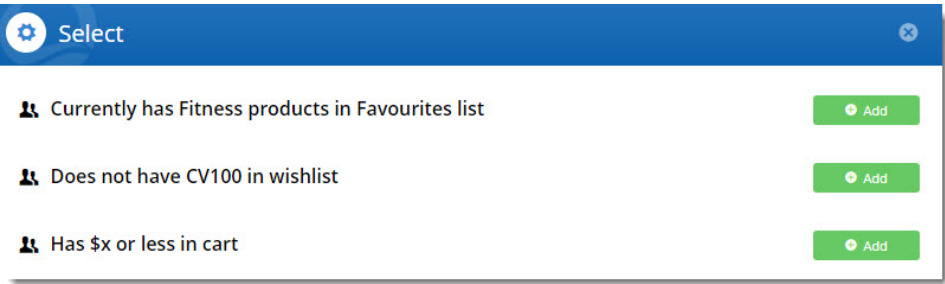
- 1. Navigate to the template the widget is on (in this example, it's the home page).



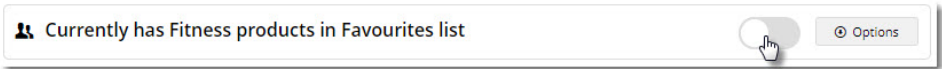
- 2. **Edit** the widget you want to personalise (in our case, a campaign slider).
- 3. Select the **Personalisation** tab, then click **Add Existing Rule**.  
(If you have not created the rule already, you can click **Add New Rule** and follow the above steps for creating a new rule).



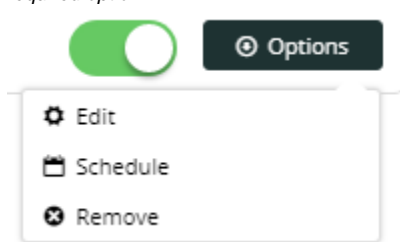
- 4. In the list of rules, locate the one you need and click **Add**.



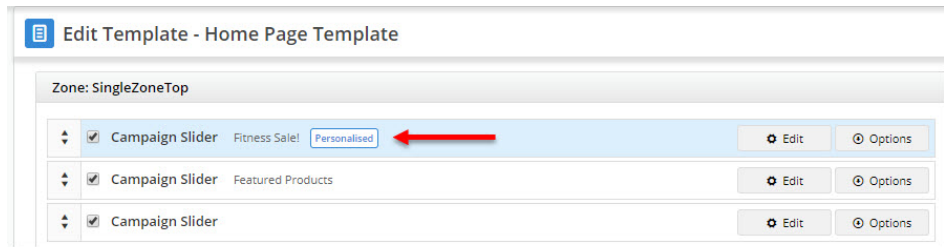
- 5. The rule will be added to the widget, with the default set to **ON** (active) upon saving. You can use the toggle to turn the rule **OFF**, for instance, if the rule is not to be applied straightaway.



6. If you need to edit or delete the rule, hover over the **Options** menu (we'll cover the Schedule option later) and select the required option.



7. Click **Save** to exit the widget. You'll see it now has a tile indicating that the widget has been personalised!



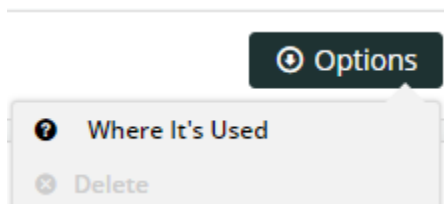
Take a look here:

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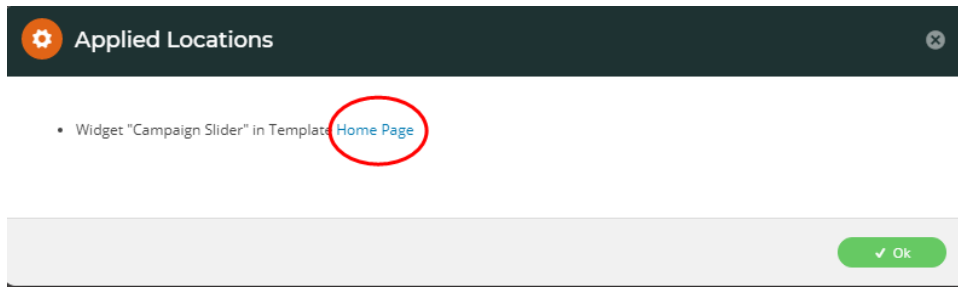
## Edit a Rule

You can edit a rule at any time, but be aware that any widgets with the rule applied will be affected.

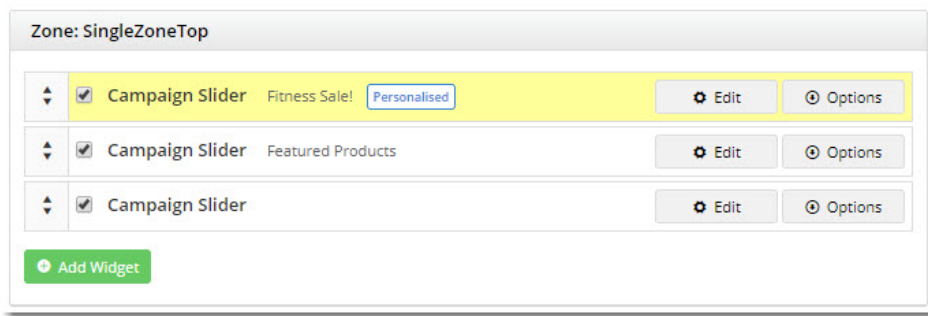
1. Navigate to **Advanced Content Personalisation Rule Maintenance**.
2. You'll see all of your existing rules listed, as well as the number of times each has been applied to a widget.
  - Note that rules applied to widgets but not toggled on are **not** counted.
3. Click **Edit** on the required widget.
4. Update the values in the scenario, or add and remove scenarios as needed.
5. To see where the rule is in use, on the top right of the page, hover over **Options** and select **Where It's Used**.



6. In the popup, you will see the locations where the rule is used.



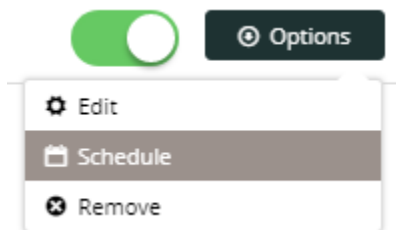
7. Clicking on the template name will take you to the template, with the personalised widget highlighted.



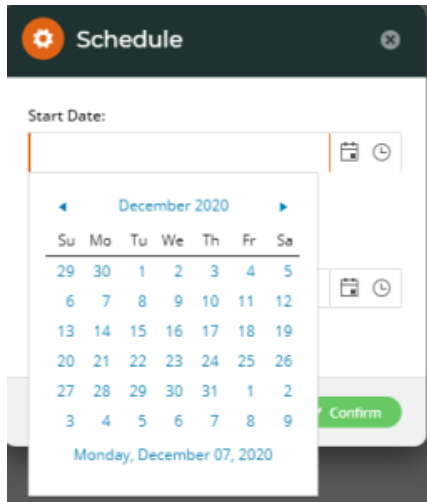
## Schedule a Rule

You may have a widget you'd like to display to your target audience for a limited time only. This is where Scheduling comes in handy.

1. With the widget open for editing, select the **Personalisation** tab. (If the rule you want is not already there, add it to the widget.)
2. Hover on the rule's **Options** button and select **Schedule**.

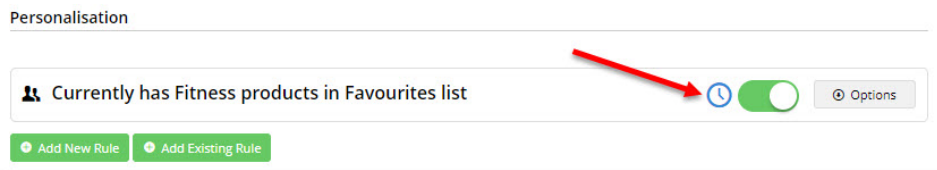


3. Click the **Calendar icon** to select a **Start Date**. Do the same to select the **End Date**.



4. Click **Confirm**.

5. A clock icon will appear on the rule to indicate that it's running on a schedule (rather than indefinitely).



Personalisation of this widget will now be in effect between the scheduled (local) times. As long as the rule is active (toggled on), the widget content will not be displayed to eligible users until the scheduled start date & time.



#### Active vs Inactive rules

If you've applied a rule to a widget but have not enabled it (i.e. not toggled it on), the rule will be considered inactive. Widgets with inactive rules will simply behave as normal, which means they will display as though no personalisation has been applied.

## Additional Information

- [Personalisation rules](#) will give you an overview of all the rules currently available within the Personalisation module, as well as sample applications for each type.
- Personalisation is now extended to Guest Users from 4.09

Minimum Version Requirements	4.01.00
Prerequisites	Guest user behaviour is not tracked until version 4.09+.
Self Configurable	Yes
Business Function	Website User Experience
BPD Only?	Yes
B2B/B2C/Both	Both
Third Party Costs	

	n/a
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## Related help

- [Personalisation Rules](#)
- [Wisdom of the Crowd - Suggested Products](#)
- [User Group Filtering](#)
- [Mailchimp Automated Email Marketing](#)
- [Layer filters - User email address](#)
- [Targeting Banners by Device](#)
- [Layers](#)
- [Layer Group Filtering](#)