Personalizing Content

In XperienCentral, personalizations are used to target relevant content to individual website visitors depending on their behavior and/or the segment or segments that they belong to. Personalizations can also be used to restrict access to certain content for a certain class of website visitors, for example those that are not logged in. You can assign a personalization to all content elements as well as selected rich text entered directly on a page in the Editor and to layouts. When website visitors fall within the targeted group, they will see the content to which the personalization is assigned. Those visitors who do not fall within the segment will not see the personalized content.

The personalizations that are available for you to assign to content are typically created and maintained by an Application Manager and/or Main Editor. For complete information on creating personalizations, see Personalize. Content personalization works hand in hand with Personas in XperienCentral. Once you have personalized content, you can preview how content in XperienCentral appears to users who belong to a persona. For complete information on previewing personalized content, see Personas.

You can personalize rich text in the Editor as well as the content in layouts. Personalizations apply to content elements as a whole.

In XperienCentral 10.18.0 and higher, the way you personalize content has changed from previous versions. Expand the section below that corresponds to your version of XperienCentral.

In This Topic

- Creating Personalization Variants
- Grouping Personalization Variants
- Nesting Personalization Variants
- Personalization Variants Toolbar Buttons

Creating Personalization Variants

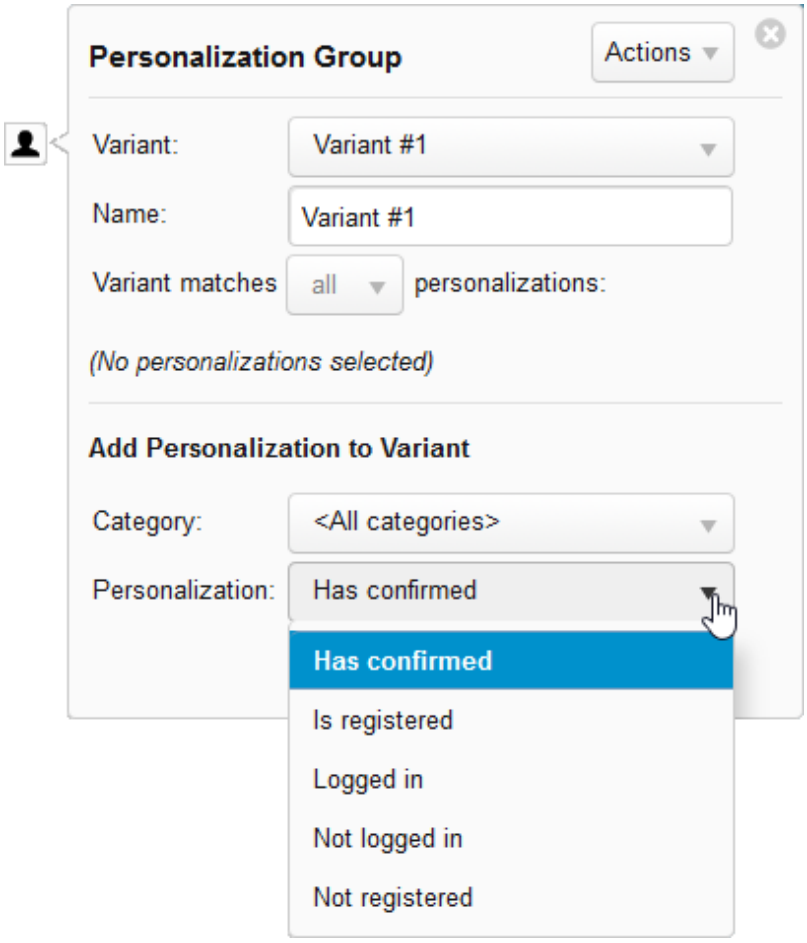
Personalizing content is achieved by assigning content to a personalization variant. A personalization variant determines the conditions for showing personalized content and what that content is. Personalization variants can be nested within each other and they can also be grouped (stacked), which allows you to define multiple variants that occupy the same position within a content item. See Grouping Personalization Variants and Nesting Personalization Variants for complete information.

To personalize content, follow these steps:

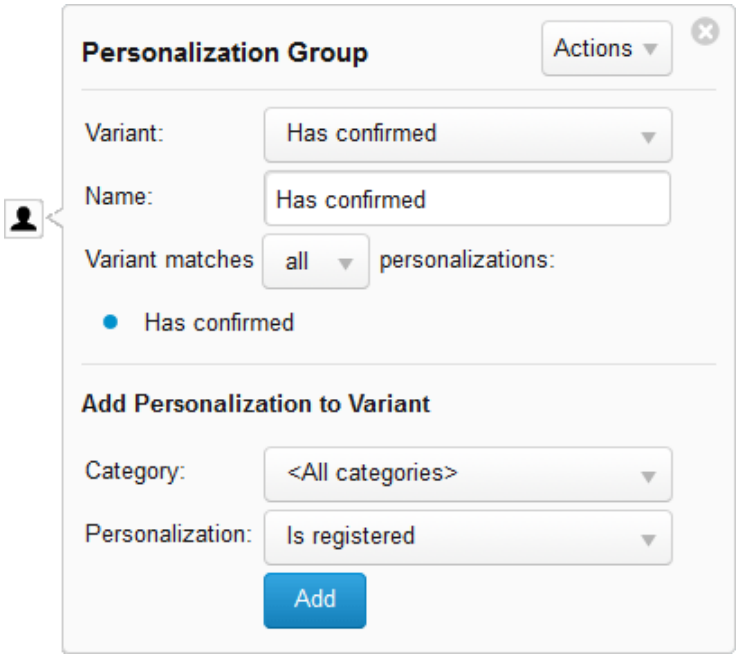
1. Double-click on the content item or hover over the title and select [Edit] to enter Edit mode.
2. If you want to personalize a content element, click it to select it. To personalize rich text, highlight it.
3. Click the Personalize icon in the Editor toolbar:

   A dialog box appears from which you can define the personalization variant.

4. Select the category to which the personalization belongs to (if applicable) from the "Select a Category" drop-down list.
5. Select the personalization from the "Select a Personalization" drop-down list. For example:



6. Click [Add]. The personalization is assigned to the content. A small "personalization" icon appears next to the content that has been personalized. The name of the personalization appears in the "Selected Personalizations" dialog box and a blue circle appears next to the name of the personalization, For example:



When a personalization group contains just one variant, the default name of the variant is the name of the personalization ("Has confirmed" in this example).

When you are in Edit mode, the content that has been personalized is surrounded by a dashed outline. There are two different indicators:

Personalized content - not selected

Personalized content - selected (active)

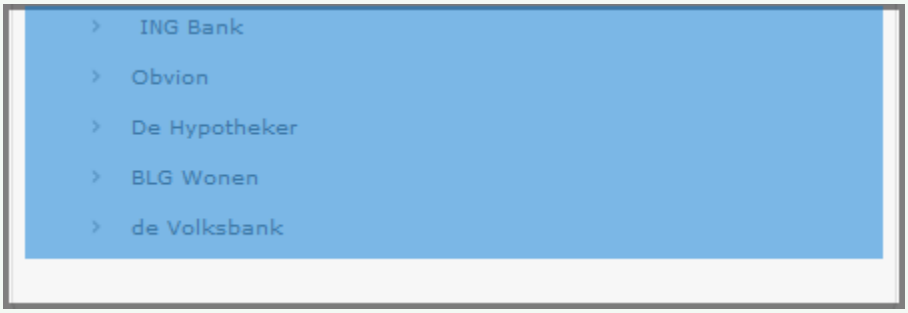
Tip for Personalizing Lists

Sometimes the Personalize button is grayed out when you highlight a list (bullet or numbered). If you encounter this situation, follow these steps:

1. Position the cursor just above or below the list. For example:

   If you cannot position the cursor just above or below the list, add an empty line.

2. Click and drag the mouse up or down over the list until it is completely highlighted. For example:



   The Personalize button is now available.

Multiple Personalizations

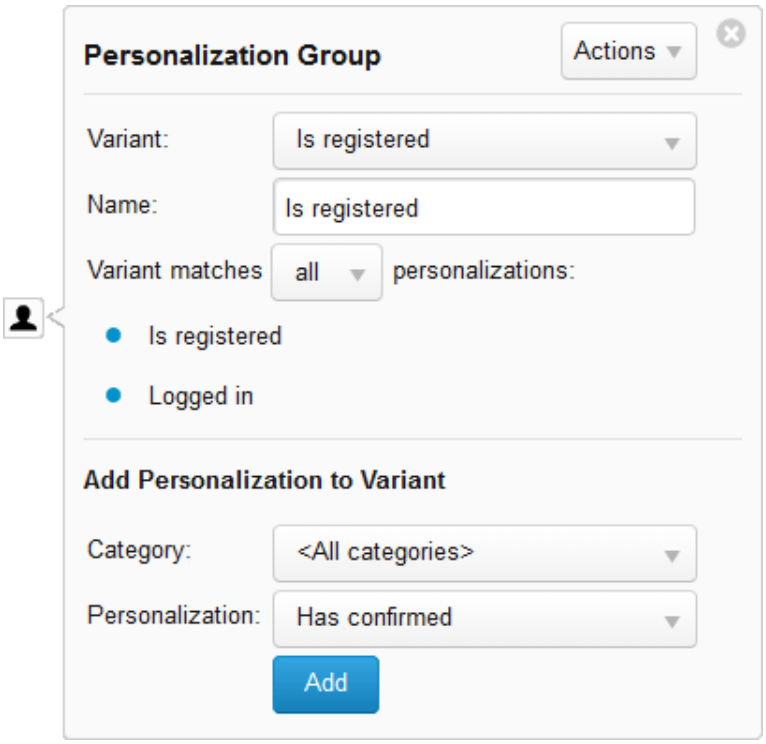
You can assign more than one personalization to a variant. When you do so, you have the option of defining whether there is an "AND" or "OR" relationship between the personalizations. When "AND" (all) is defined, the content will only be displayed when all personalizations are matched. When "OR" (any) is defined, the visitor will see the content when they match any of the assigned personalizations.

To assign multiple personalizations to a variant, follow these steps:

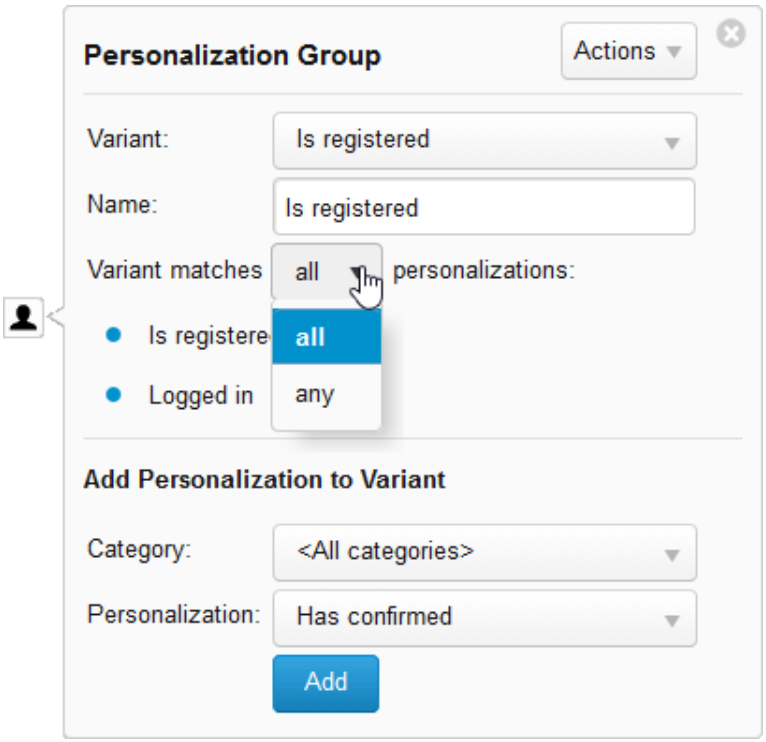
1. Double-click on the content item or hover over the title and select [Edit] to enter Edit mode.

2. Select the content that you want to personalize.
3. Click the Personalize button in the Toolbar.
4. Select the personalization from the "Personalization" drop-down list.
5. Click [Add].
6. Repeat the previous two steps for each personalization you want to assign to the variant.

   All personalizations assigned to the variant appear in the list. For example:



7. Select whether the personalizations have an AND (all) or an OR (any) relationship with each other from the drop-down list. For example:



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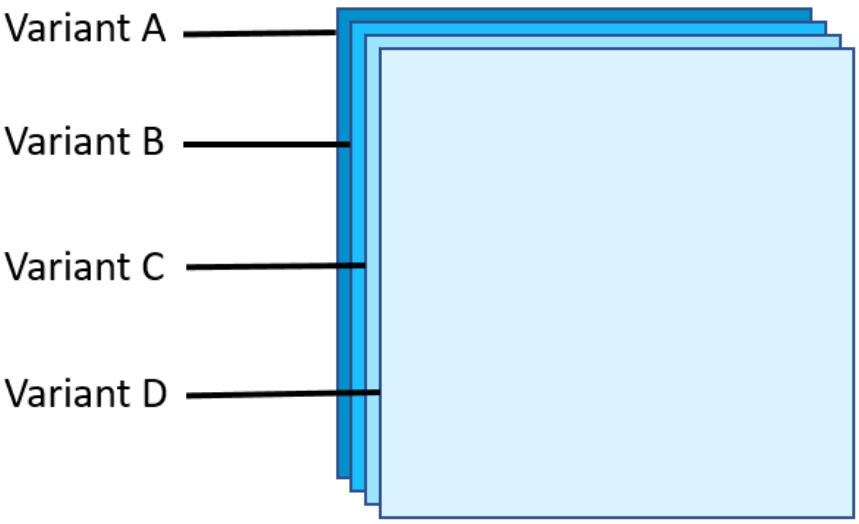
Grouping Personalization Variants

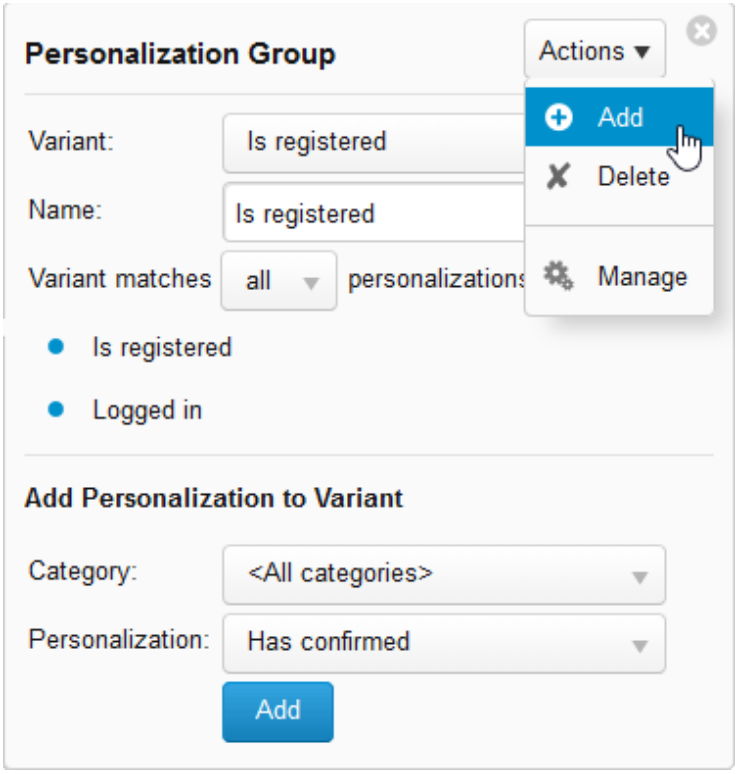
Grouped personalization variants are variants that are assigned to the same position on a content item. When you group or stack personalization variants, only one can be triggered depending on the defined conditions. You determine the order in which personalization variants are evaluated and triggered. Grouped personalization variants can be visualized as follows:



As you can see, the stacked personalization variants are all assigned to the same location on the content item. When a website visitor matches a personalization variant, the content assigned to that variant is shown. When variants are grouped, only one of them is triggered.

To group personalization variants, follow these steps:

1. Select the content that you want to personalize.
2. Click [Personalize].
3. Create a personalization variant.
4. Select Add from the Actions menu:



The new variant is added to the group.

5. Add one or more personalizations to the new variant and define it further as described in Creating Personalization Variants. Add as many variants to the group as needed.

   After you add one or more variants to the group, the personalize icon changes to reflect that there are multiple variants assigned to the group:

Adding Content for a New Variant in the Group

After adding a new variant to the group, the content belonging to the previously selected personalization variant disappears and new content can now be added for the new variant. The dashed box denoting the location of the variant "block" surrounding the location of the personalization area will be empty. For example:

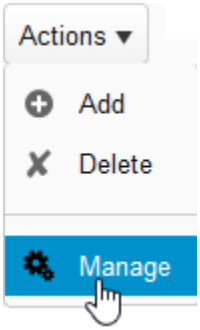
Click within this area and add content as you normally would (type rich text directly in the area or click [Insert] and add a content element or layout).

Defining the Order of Evaluation

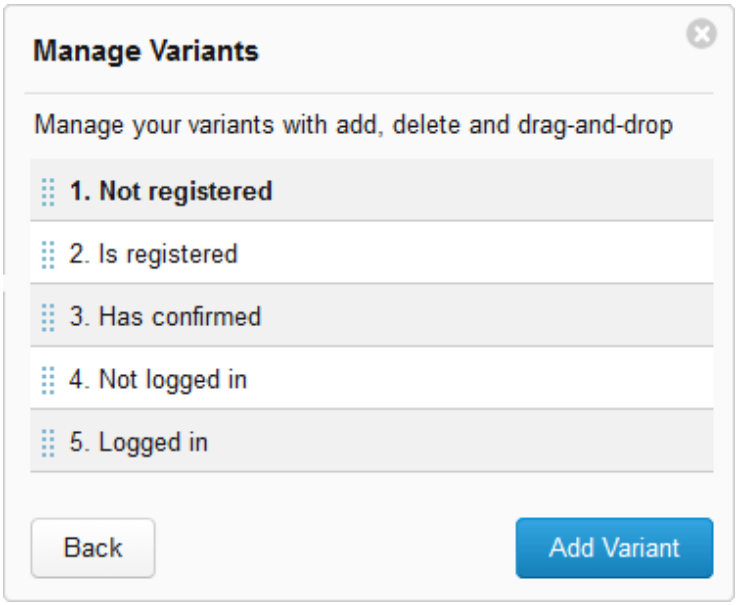
When personalization variants are grouped, only one of them is allowed to be triggered. You define the order that the variants are evaluated or stepped through to define the personalized content that the visitor will see. To do so, follow these steps:

1. Open the personalization group.

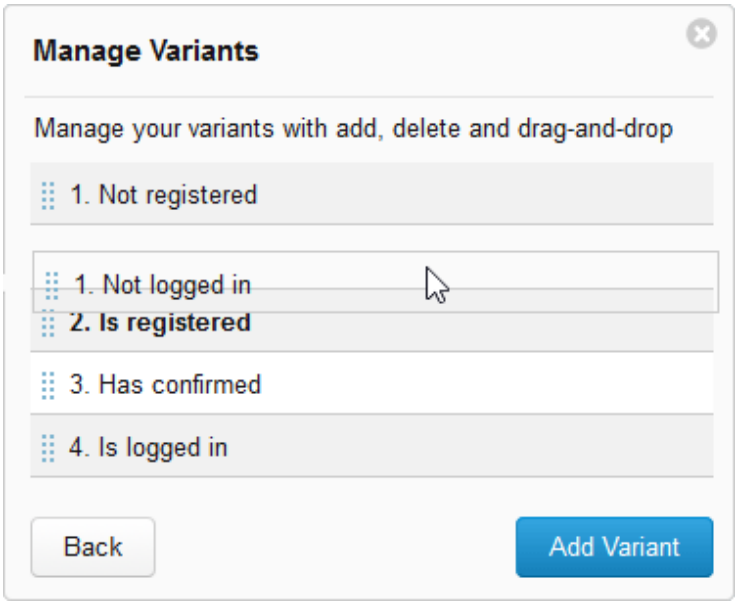
2. Select Manage from the Actions menu:



The variants are listed in the order they will be evaluated. For example:



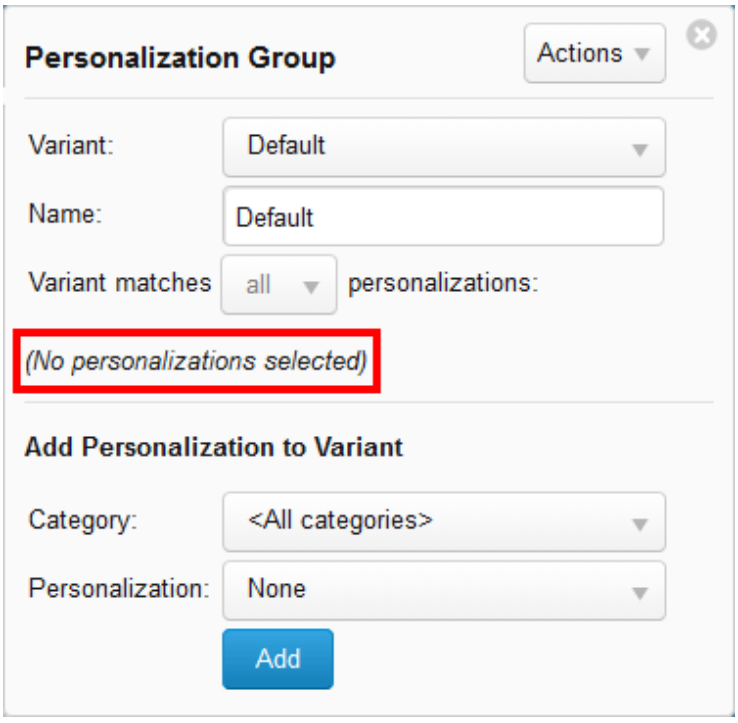
The personalization(s) assigned to the first variant that is matched will be shown to the website visitor. To change the evaluation order, click and drag a variant up or down in the list. For example:



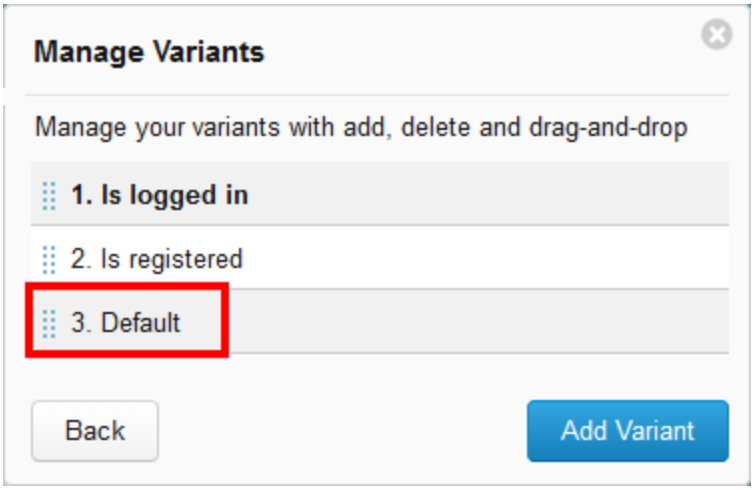
Setting a Default Personalization Variant

When a personalization variant group is defined for a content area, it can be the case that none of the variants in the group is triggered. For this reason it is a good idea to add default content that displays for all visitors who do not belong to any of the defined facets. To do so, follow these steps:

1. Create a personalization variant in the group that has no personalization assigned to it. For example:



2. Drag the empty variant to the end of the list in the group. For example:



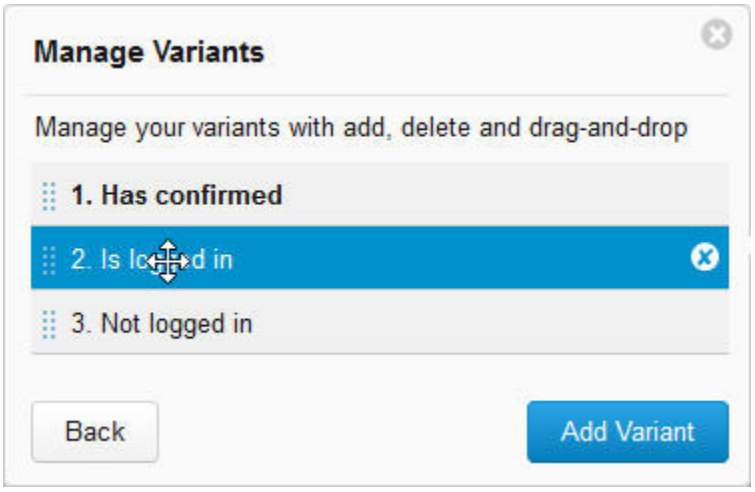
3. Add the default content to the default personalization variant.

Cycling through Variants in a Personalization Group

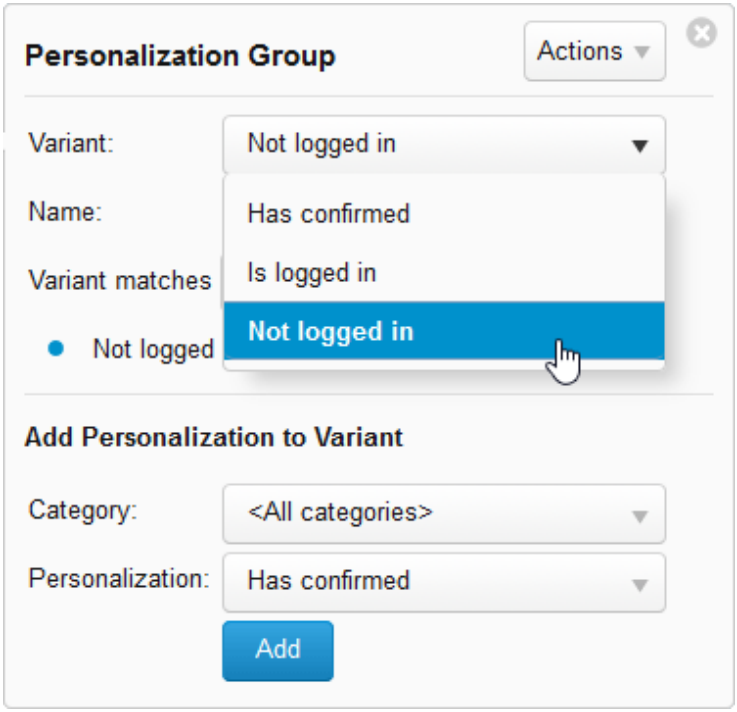
When a personalization group has been defined, naturally only one of the variants can appear at a time in the Editor. When you first open a content item containing a personalization group, the first one in the list (#1) is the one that will appear at the location of the group. When you are actively editing a content item and you select a different variant from the drop-down list, the last variant that you selected will be the one that displays throughout the time you are active on the content item. The first one in the list will always be shown after you either navigate away from the content item and return or after a browser refresh.

To cycle through the variants, click the personalization icon . To select a different variant, you can either double-click on the variant name in the Manage Variants panel or you can select the variant you want to view/edit from the Variant drop-down list. For example:

Double-click on the name of the variant:



Select the variant from the drop-down list:

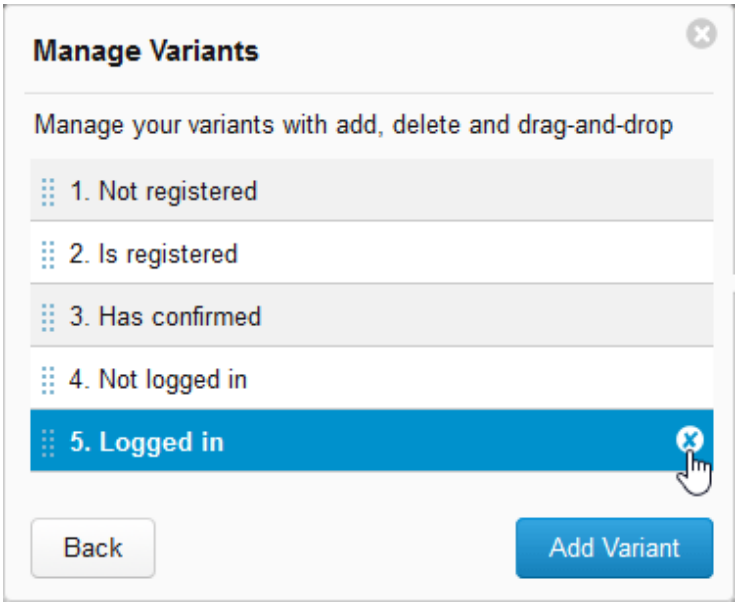


The content you added to the variant you select will appear in the personalization block.

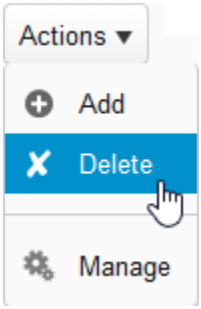
Deleting a Personalization Variant

There are two ways to delete a variant:

- In the Manage Variants list, hover the mouse over the right side of the variant and click the X:



- While viewing the variant details, select "Delete" from the Actions menu:



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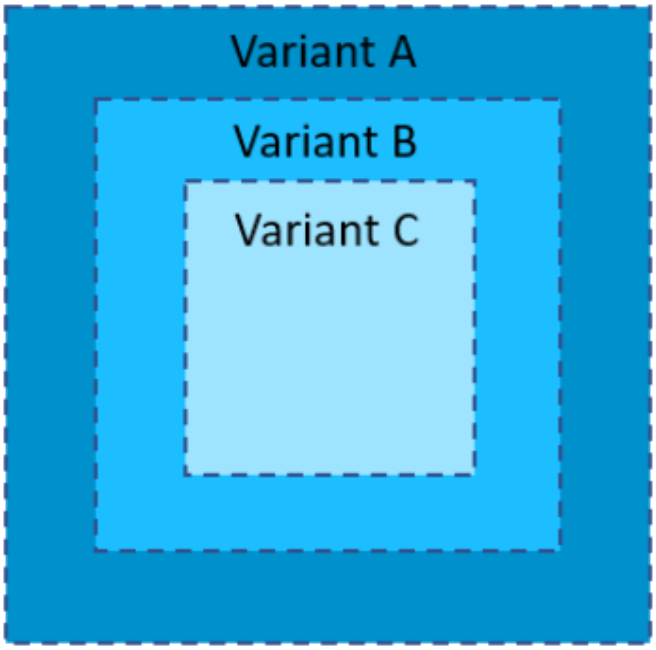
Nesting Personalization Variants

Content in a layout can be personalized just as rich text can in the Editor. Furthermore, the layout itself can fall within another personalization together with content in the Editor thus creating a nested situation. Personalization variants nested within each other can be visualized as follows:



When a personalization variant is nested within another, the content will not be shown unless the outer personalization variant is triggered. In the example above, personalization variant B cannot be triggered unless personalization variant A is triggered. Likewise, personalization variant C cannot be triggered unless both A and B are.

Working with nested personalization variants is no different that working with single variants or grouped variants. See Creating a Personalization Variant and Grouping Personalization Variants.

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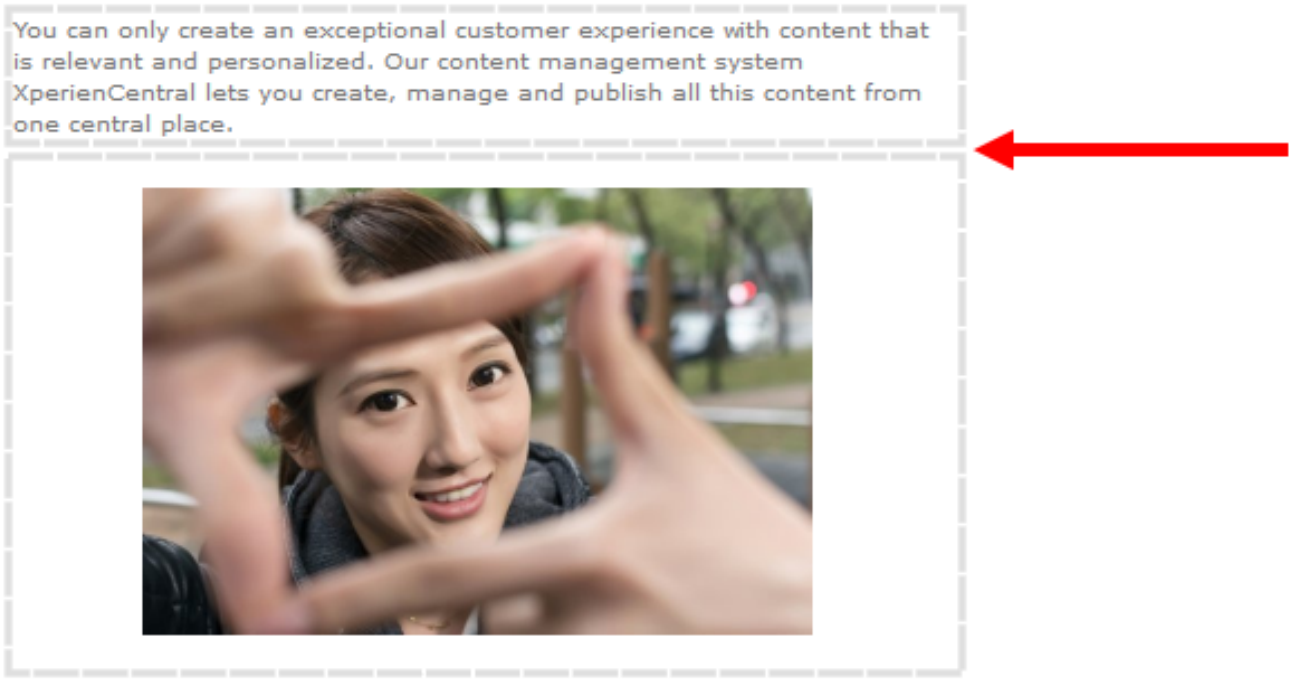
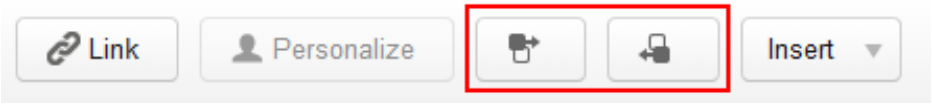
Personalization Variants Toolbar Buttons

Because of the way that personalization variants are rendered with respect to other content in the Editor, you can run into situations where you cannot add white space or other content between adjoining personalization variant blocks in the same way that you can between content elements and rich text. For this reason, two extra buttons become available in the Editor's toolbar that make it possible to add white space before or after a personalization variant block. Consider the following example - two personalization variant blocks abut each other and it is not possible to insert the cursor between them:



In such situations, two extra toolbar buttons can become available which make it possible to insert an empty line above or below a personalization variant block:



Click in a personalization variant block to make it active and then click the Insert Empty Line Above or Insert Empty Line Below button. An empty line is inserted at the desired location. You can now add new content between the personalization variant blocks. These buttons are only available when the conditions call for it. Sometimes you may see only one of these two buttons.

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- Editing Personalization Assignments

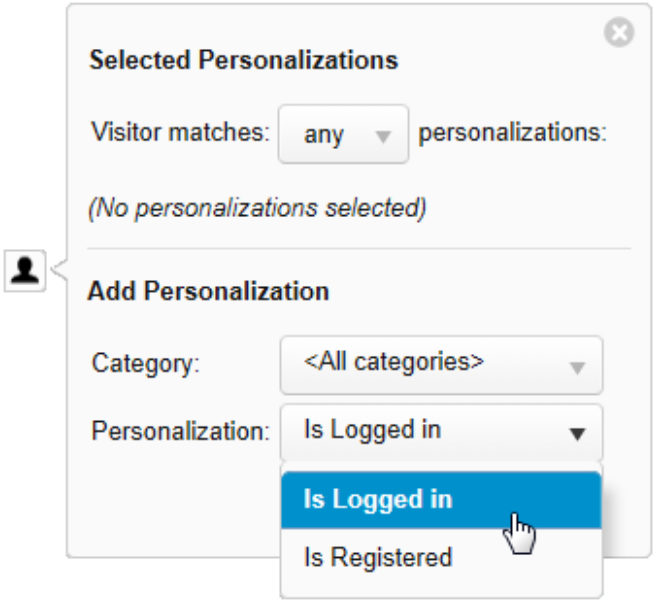
Adding Personalizations

To personalize content, follow these steps:

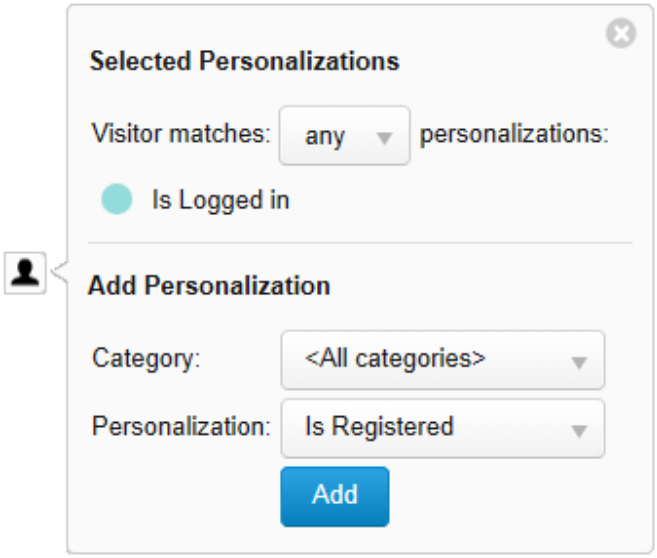
1. Double-click on the content item or hover over the title and select [Edit] to enter Edit mode.
2. If you want to personalize a content element, click it to select it. To personalize rich text, highlight it.
3. Click the Personalization icon in the Editor toolbar:

   A dialog box appears from which you can select the personalization.

4. Select the category to which the personalization belongs to (if applicable) from the "Select a Category" drop-down list.
5. Select the personalization from the "Select a Personalization" drop-down list. For example:



6. Click [Add]. The personalization is assigned to the content. A small "personalization" icon appears next to the content that has been personalized. The name of the personalization appears in the "Selected Personalizations" dialog box and a colored circle appears showing the color assigned to the personalization, For example:



When you are in Edit mode, the content appears in the color assigned to the personalization.

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Color Coding

XperienCentral uses color coding to indicate that content has one or more personalization assigned to it. Once a color has been assigned to a personalization, then that same color is used for that personalization everywhere it is used in the channel. For example, if you create a personalization named "Is Logged In" and XperienCentral assigns it to appear green, then from that point on, "Is Logged In" will always appear green wherever it is used and no other personalization can be assigned to green.

Personalizations are managed by your application manager. Contact him or her for complete information on which personalizations are available for use.

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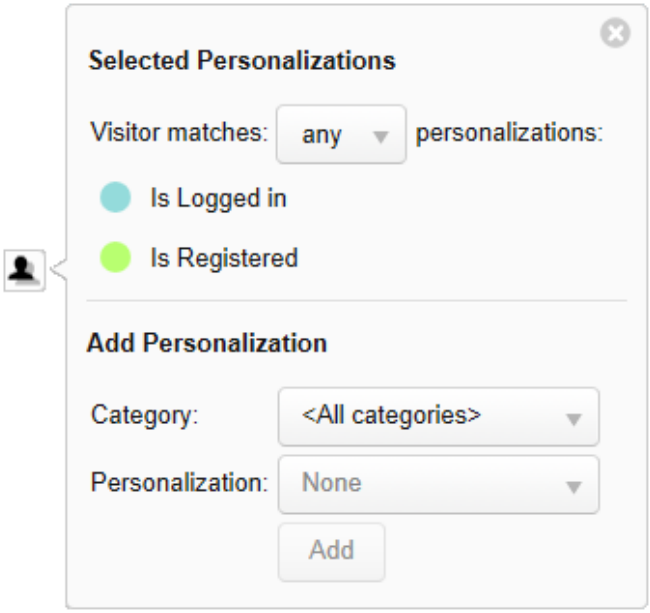
Multiple Personalizations

You can assign more than one personalization to the same content. When you do so, you have the option of defining whether there is an "AND" or "OR" relationship between the personalizations. When "AND" (all) is defined, the content will only be displayed when all personalizations are matched. When "OR" (any) is defined, the visitor will see the content when they match any of the assigned personalizations.

To assign multiple personalizations to content, follow these steps:

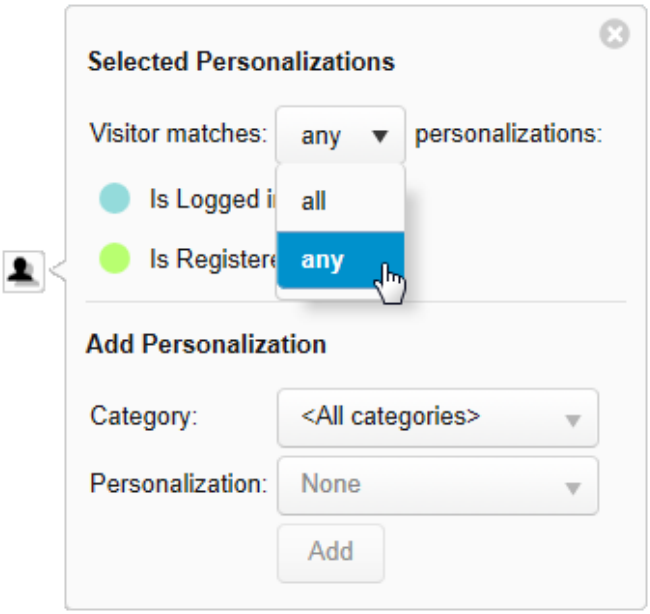
1. Double-click on the content item or hover over the title and select [Edit] to enter Edit mode.
2. Select the content that you want to personalize.
3. Click the Personalize button in the Toolbar.
4. Select the personalization from the "Personalization" drop-down list.
5. Click [Add].
6. Repeat the previous two steps for each personalization you want to assign to the content.

   All personalizations assigned to the content appear in the list. For example:



When multiple personalizations are assigned to content, the colors are blended into a striped configuration.

7. Select whether the personalizations have an AND (all) or an OR (any) relationship with each other from the drop-down list. For example:



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Editing Personalization Assignments

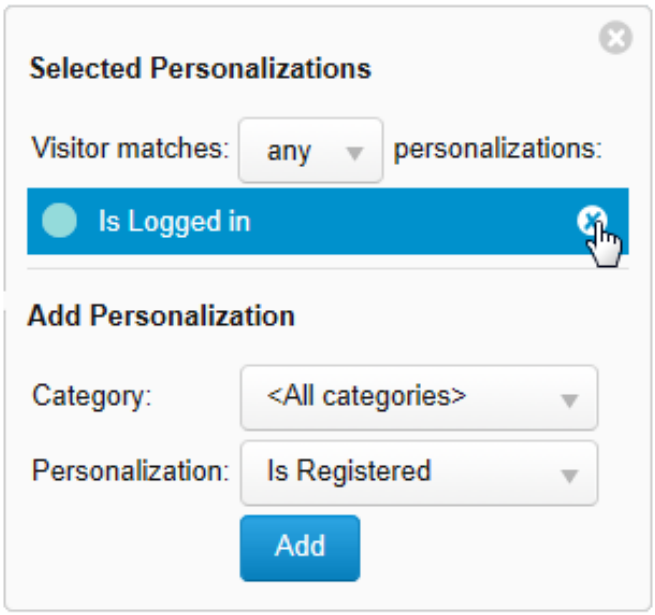
To modify the personalization(s) assigned to content, follow these steps:

1. Double-click on the content item or hover over the title and select [Edit] to enter Edit mode.
2. Click the personalization icon to the right of the content to open the Select Personalization dialog box.
3. Modify the personalization assignments as desired.
4. Close the Select Personalizations dialog box by clicking the Close icon in the upper right corner.

Removing a Personalization

To remove a personalization from content, follow these steps:

1. Double-click on the content item or hover over the title and select [Edit] to enter Edit mode.
2. Click the Personalization icon to the right of the content in the Editor. The Select Personalizations light box appears.
3. In the list of personalizations in the "Selected Personalizations" dialog box, hover the mouse over the personalization you want to remove and click the "X" to the right of it. For example:



The personalization is removed from the content.

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