

Sitecore RULES!

Using the Rules Engine
beyond personalization

LASUG

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Presented by:
Amir Setoudeh

SOCIAL

MULTI-SITE

INTERACTION

SEARCH

Amir Setoudeh

Freelance Sitecore Architect

amir@setotech.com



@MasterToWeb



www.mastertoweb.com

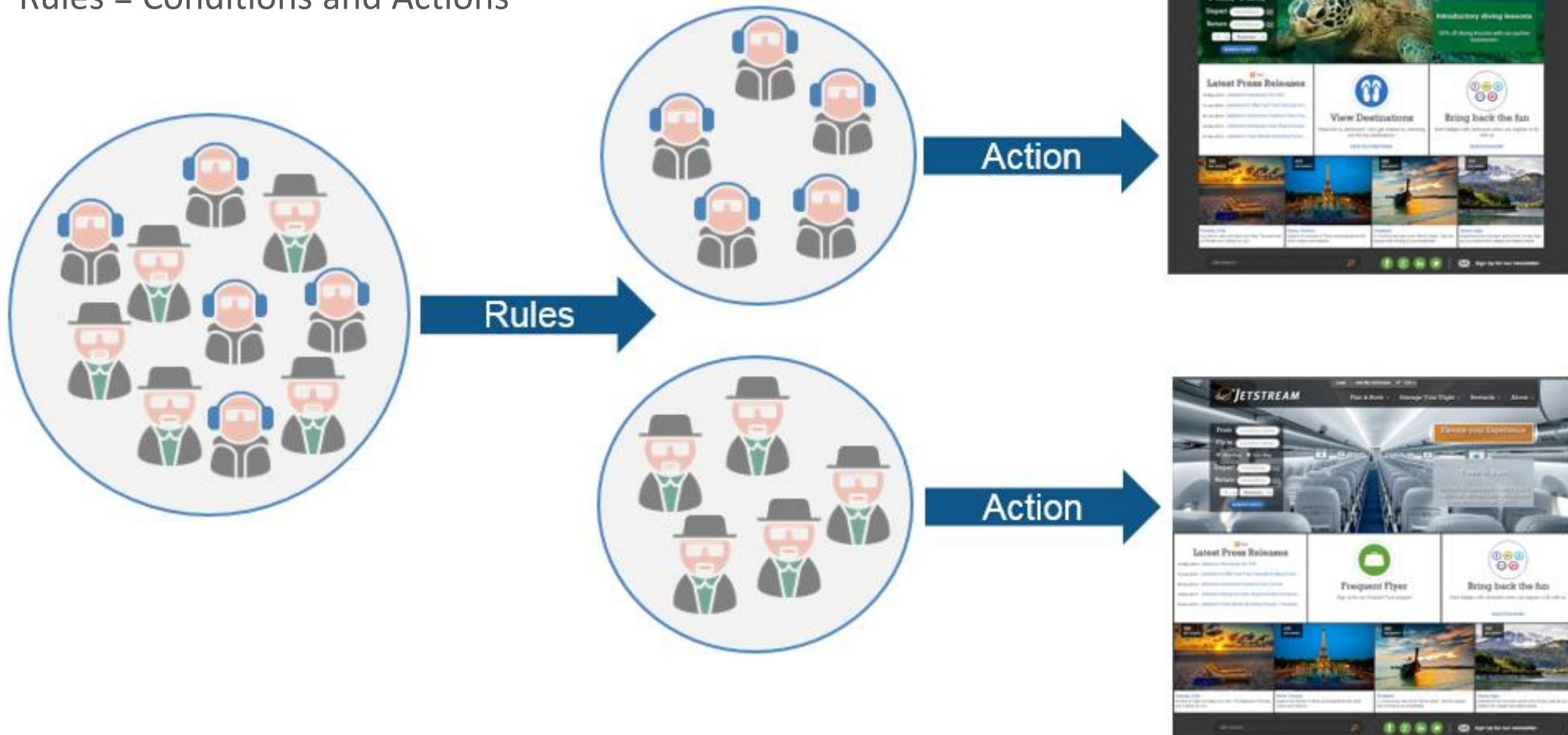


<https://www.linkedin.com/in/amirsetoudeh/>



Objective

Rules = Conditions and Actions





Sitecore's Rules Engine provides:

- The ability to personalize components in the item's presentation.
- The ability to evaluate conditions and perform actions that is usable for business users.
- A consistent means for configuring complex, rule-based business logic within Sitecore.

However, these abilities are NOT limited to the presentation. Rules can be invoked from code, during events in Sitecore and even used on item templates.

Thinking outside the box

How can the Rules Engine be used to solve content authoring needs or other business requests?

- Integrating rules with Sitecore events
- Integrating rules with item templates
- Evaluating rules within code

Enabling workflow on SXA items

- Since SXA templates are pre-built by Sitecore, so enabling Standard Values or Workflows can be very time-consuming.
- This becomes even more difficult if certain items need to go through separate workflows.
- Sitecore's recommendation to "Add and extend an SXA template" states that you should create a NEW template, and inherit from SXA ones. As you can imagine, this can become quite tedious.

Thinking outside the box

How can we use the rules engine to solve this problem?

We can solve it by tapping into Sitecore pipelines and evaluating rules and applying actions.





Credit to Matt Gramolini, Juozas "Jimbo" Baltika and Zachary Kniebel for their contributions to the starting point of this structure and code.

<https://sitecore.stackexchange.com/questions/2919/automatically-creating-data-sources-for-renderings-on-a-new-page>

Using Rules on Item Fields

In addition to executing rules on events, you can also create “page-level” rules.

In this scenario, we add a “Rules” field to the item template.

In our code, we can then evaluate the rules, and perform the actions needed.

Example scenarios:

- User lands on newsletter sign up page, but has previously signed up. Redirect to a “Thank You” page.
- Page is restricted to people who have completed specific goals or triggered specific campaigns.
- You want to redirect a page to a specific language based on GEO-IP information.
- You want to redirect a contest page after it has ended.



Credit for page-level rules example code:

Marek Musielak

<https://www.skillcore.net/sitecore/sitecore-page-rules>

Back to the Basics – Sort of.

- Creating Custom Conditions
- Creating Custom Actions

What does it all mean?

Francesca Green

DASHBOARD > Contact

Back

Timeline

056 07:23:00

057

058

059

060

061

062

063

064

065

Overview

Activity

Profiling

Details

Social

Order History

Satisfaction

Latest events

Visit

25.11.2015 00:23:21 (1Y:8M:21D)

Fremont, CA, US

External search

"summer vacation" from google.com

25.11.2015 00:23:21 (1Y:8M:21D)

jetstream.sc-demo.net

Best pattern matches

Eddie the Engaged

Latest match: 0 visit ago, 1Y:8M:21D

Best pattern match - see more information here...

Recent campaigns

Promotion: Online/Organic search/Organic non-branded search (41/20/02)

Converted: 0 visit ago, 1Y:8M:21D

Recent campaigns shown - see more information here...

Recent Orders

Order # 1834393

Order Total: \$43.95

Guest Value and Satisfaction

Lifetime Value: \$2,584.95

Brand Satisfaction: ★★★★★

DETAILS

Name

Francesca Green

Email

fran_green@hotmail.co.uk

Phone

More info

LATEST VISIT

Last visit

00:23:21 25 November 2015

Recency

1Y:8M:21D

City

Fremont

Region

CA

Country

US

Visit details

STATS

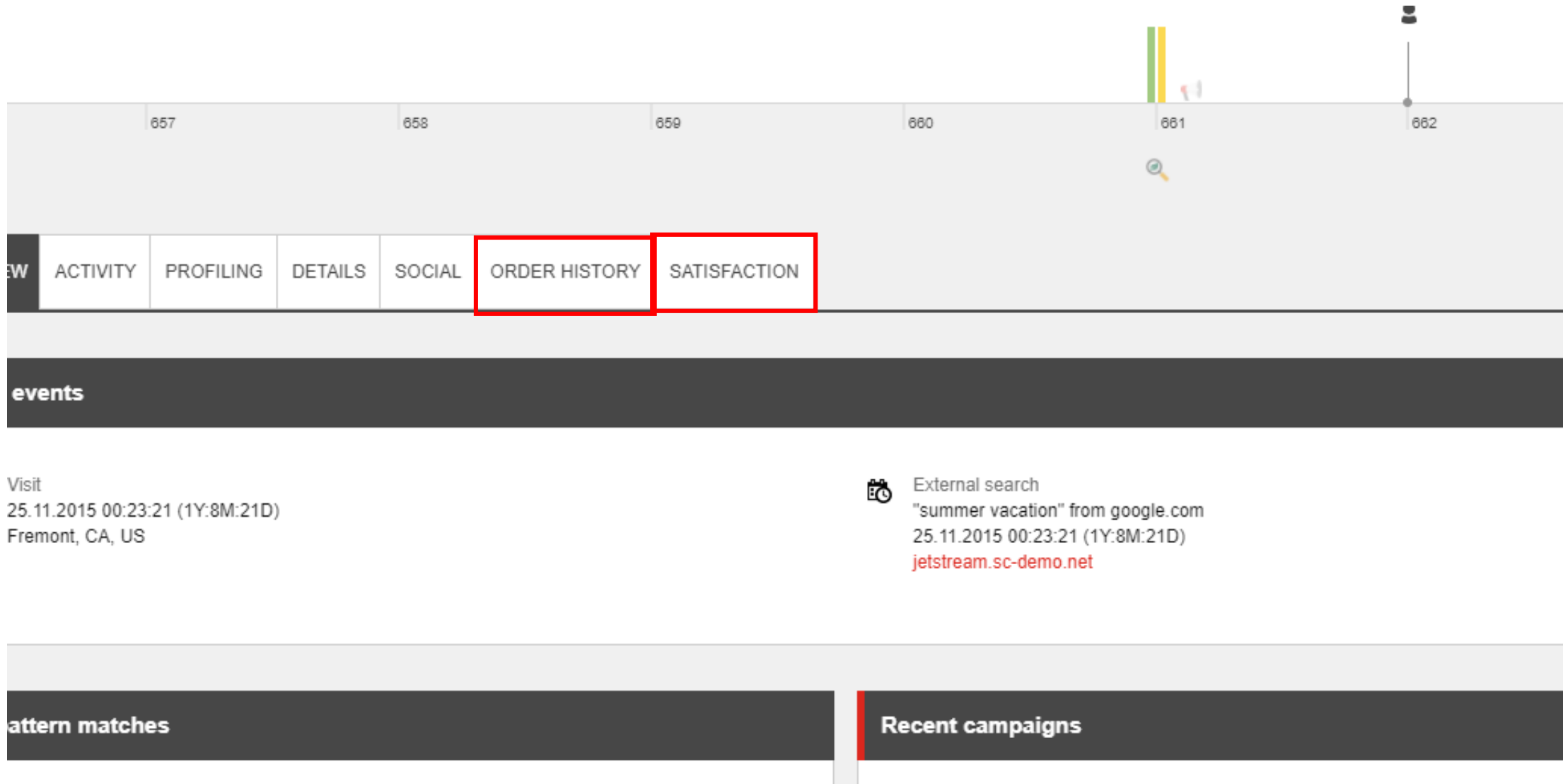
Visits

1

Value

10

What does it all mean?



What does it all mean?



Visit

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Fremont, CA, US



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Practical Applications

Rule Set Editor

Select the conditions and actions for your rule first. Then, specify the values in the Rule Description field.

Select the conditions for the rule:

when the date has passed

when the current day of the month compares to number

when the current day is day of the week

when the current month is month

Device

where the device browser compares to specific value

where browser supports HTML 5 audio

where browser supports HTML 5 video

where browser supports JavaScript

where the device hardware model compares to specific value

Rule description (click an underlined value to edit it):

Condition Name

where the time elapsed since last order is 3 months

itized. The first true condition determines which

New Condition

Actions ▾

Reach	Effect
00%	00%



Offer valid:
10/11/2018

50% OFF DISCOUNT

*** Conditions:**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Praesent pretium fermentum quam sit amet semper. Suspendisse aliquam pulvinar magna, vitae varius ex scelerisque quis. Vivamus sed lacus faucibus, accumsan lectus et, ultrices lorem. Proin metus eros, tempus eu tincidunt et, consectetur at ligula.



Practical Applications

when the date has passed
when the current day of the month compares to number
when the current day is day of the week
when the current month is month

Device

where the device browser compares to specific value
where browser supports HTML 5 audio
where browser supports HTML 5 video
where browser supports JavaScript
where the device hardware model compares to specific value

Rule description (click an underlined value to edit it):

Condition Name

where the guest satisfaction rating is less than 3 stars

Actions	
Reach	Effect
0%	= 0%

Actions	
Reach	Effect
0%	↑ 25%

Contact Us

Question, Concern Or Compliment — We Want To Hear About It

We welcome your questions. Feel free to call, write, or email us and we'll be happy to answer your questions.

Practical Applications

when the date has passed

when the current day of the month compares to number

when the current day is day of the week

when the current month is month

Device

where the device browser compares to specific value

where browser supports HTML 5 audio

where browser supports HTML 5 video

where browser supports JavaScript

where the device hardware model compares to specific value

Rule description (click an underlined value to edit it):

Condition Name

where the most common menu item ordered is Thai Shrimp Salad

Actions ▾ ▲

Reach	Effect
0%	= 0%

Actions ▾ ▲

Reach	Effect
0%	↑ 25%



Takeaways

Rules Engine:

- Think outside the box when it comes to rules. There is so much more you can do beyond personalization.
- Think of ways to satisfy business demands without making it complicated. You don't need to create "if, then" conditions inside renderings or controllers.
- Rules make things maintainable.

Personalization:

- Don't neglect your data.
- Don't ignore the possibilities of what you can do with that data.
- Sitecore is an effective resource for using information to drive a powerful, engaging, and customized experience.
- The enhanced experience will lead to better conversions and build trust in the brand.

A word of caution

"Hey, we noticed your Facebook status changed to 'Single' and you used to order for two people in the past few years, but have been ordering individual meals recently. Would you like to try our"



NEW KFC

**FAILURE PILE
IN A
SADNESS BOWL**

**FROM ONLY
\$3⁷⁰**

Image for illustration purposes only. Terms & conditions apply.

The advertisement features a man's face in the bottom left corner. To his right are four KFC bowls: two 'ORIGINAL GO BOWL' (one with 'SIGNATURE GRAVY') and two 'LOADED GO BOWL'. The bowls are filled with fried chicken, fries, and various sauces. The KFC logo and 'It's Finger Lickin' Good' slogan are visible on the bowls. The background has red and white vertical stripes.

<https://www.youtube.com/watch?v=tfan5Macmsl>

Thank You

