



Sale Offer Targeting Checklist

Companion to the guide *Show the Right Sale Offer to the Right Visitor*. Works with the free plugin; Pro and Pro+ items are marked.

Popup Maker
wppopupmaker.com

1 Targeting rules, before the sale starts

Rules inside one group are joined with **or**; separate groups are joined with **and**. Every exclusion goes in its own group with the not toggle on.

- ☐ Checkout, order-received and account pages excluded, each in its own **and** group, on every sale popup except the thank-you.
- ☐ Public announcement excluded for logged-in users or member roles **PRO** or kept off member pages (free).
- ☐ Members' popup targeted to their roles **PRO** or their pages (free).
- ☐ Recent buyers: eligibility line reads correctly after a purchase; thank-you cookie set and the other sale popups check it.
- ☐ Administrators excluded **PRO** or you are testing only in separate browser profiles.
- ☐ Four states by three screens rehearsed on staging and recorded in your test notes, with the cookie state noted for each case.

2 Rehearse as four people, on three screens

On a staging copy with the payment gateway in test mode. Tick a box only when the screen showed exactly what the cell says. No real orders; keep the production coupon unavailable until launch.

Visitor state	Desktop	Phone (real device)	Tablet or small laptop
Logged out	☐ Announcement once; nothing on a blog post; exit reminder PRO on leaving a product page with items in the cart; nothing on checkout.	☐ Same; close button reachable; page scrolls after close; code selectable.	☐ Same as desktop.
Logged-in customer	☐ Planned wording or suppression; nothing on account pages.	☐ Same as desktop, plus the phone checks.	☐ Same as desktop.
Member or wholesale role	☐ Members' message only; public code never shown.	☐ Same as desktop, plus the phone checks.	☐ Same as desktop.
Recent buyer (after a staging test order)	☐ Thank-you once on the confirmation page; other sale popups suppressed in this browser if you use the cookie rule; then open a second browser and record what a buyer sees there.	☐ Same as desktop, plus the phone checks.	☐ Same as desktop.

Cookie state per case. Fresh audience or targeting case: clear the Popup Maker cookies (the [Debug Tools Chrome extension](#) can do this) or use a separate browser profile. Repeat-suppression case: keep the same session and cookies. Private windows may share one session; close them all or clear cookies explicitly.

3 Three things people miss on phones

- Close button under the browser bar.** Toolbars overlay the top and bottom edges; move the close control inward or add a close link inside the content.
- Popup taller than the screen.** If the visitor cannot reach the button, they cannot act.
- Exit intent on phones.** Mouse Leave never fires on a phone. **PRO**: enable a mobile method (Back Button, Lost Browser Focus, Mobile Scroll, mobile Time Delay) or accept a desktop-only reminder.

4 Test notes

Staging URL, versions, time zone, test accounts, date tested.

Features and labels can vary with your installed version and store integration. Confirm the required add-ons and test the actual visitor path before launch.

Full guide: wppopupmaker.com/guides/show-the-right-sale-offer-to-the-right-visitor/