Product Recommendations Analytics

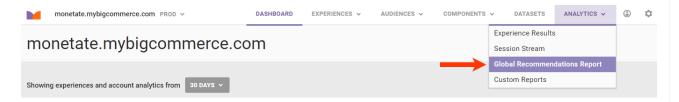
You can access three global reports and four experience-level reports, all with specific filters applied, within Monetate. They help you better understand how recommendations are performing at the account level and experience level.

Do not use tabbed browsing across multiple accounts when looking at these reports. You may experience data issues.

See Product Recommendations Reports Terminology for definitions of various report metrics.

Global Reports

The three global reports offer a high-level view of how recommendations are performing. Access the Recommendation Account Report, the Recommendation Experience Report (All), and the Recommendation Product Report by selecting **Global Recommendations Reports** from **ANALYTICS** in the top navigation bar.



Recommendation Account Report

The Recommendation Account Report on the **Account Summary** tab contains charts and tables that indicate the overall performance of an account's recommendations program, specifically focusing on the impact that respondents have compared to visitors who didn't respond to the recommendations.

If you have multiple accounts in Monetate, then you must be in the account to see its Recommendation Account Report. You cannot change accounts from the report screen.

Global Recommendations Reports

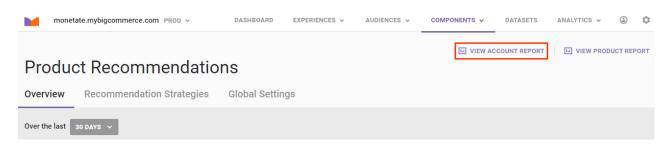
Account Summary All Experiences All Products



You can change the lookback period by selecting an option from Session Date and then clicking the refresh icon.

Global Recor	nmendations	s Reports		
Account Summary	All Experiences All	Products		
Recommenda Session Date is in the last 7 days	tion Account Repo	rt♡	\rightarrow	C ≠ ; ⊡

In addition to accessing this report from **ANALYTICS** > **Global Recommendations Reports**, you can view it by clicking **VIEW ACCOUNT REPORT** on the Product Recommendations page.



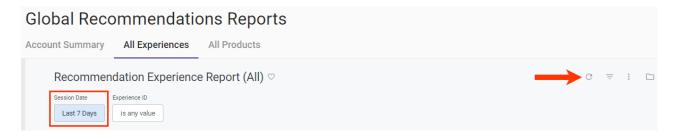
All Recommendations Experiences Report

Click the All Experiences tab to view the Recommendation Experience Report (All).

Global Recommendations Reports

unt	Summary All Experiences All Products			
Re	ecommendation Experience Report (All) igodot		9m ago 🔿 🚍	:
	ssion Date Experience ID Last 7 Days Is any value			
		Experience		
	Experience ID	✓ Name		
1	1796868	PDP-You May Also Like		
2	1772805	HomePg Product Recs		
3	1704074 🚥	Cart Product Recs		
4	1693757	PDP-Recently Viewed		
		Respondent Cart Revenue Distribution ①		۵

Its charts and graphs capture various performance metrics for all active recommendations experiences in the account for the last 7 days. You can change the lookback period by selecting an option from **Session Date** and then clicking the refresh icon.



You can also narrow the scope of the report by clicking Experience ID and then selecting one or more IDs.

Product Report

Click the **All Products** tab to view the Recommendation Product Report. It contains information about all the products sold either directly or indirectly through recommendations for the account.

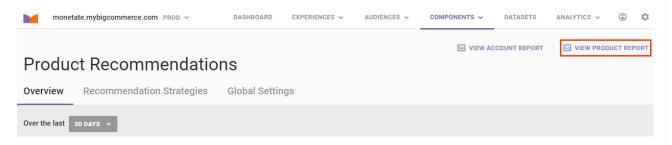
Global Recommendations Reports

ount Summary	All Experiences A	All Products									
Recommen	dation Product Repo	ort ♡							6m	ago C = :	
Experience ID	Session Date										
is any value	is in the last 7 days										
				R	ecommendation	Product Report					
Product ID	Title	Description	Impressions	Clickthroughs	ecommendation Clickthrough Rate	Product Report	Direct Revenue	Total Revenue	Direct Units Sold	All Units Sold	
Product ID			Impressions		Clickthrough Rate		Direct Revenue			All Units Sold	

You can change the lookback period by selecting an option from Session Date and then clicking the refresh icon.

Global Recommendations Reports Account Summary All Experiences All Products Recommendation Product Report \bigcirc \Rightarrow : \Box Experience ID is any value is in the last 7 days Recommendation Product Report \bigcirc

In addition to accessing this report from **ANALYTICS** > **Global Recommendations Reports**, you can view it by clicking **VIEW PRODUCT REPORT** on the Product Recommendations page.



While you can view an experience-specific version of this report by selecting its ID from **Experience ID**, you can better access it from the experience's Experience Results page. See Product Report in the Experience-Level Reports section of this documentation for more information.

Experience-Level Reports

Four reports about different aspects of a specific recommendations experience are available so that you can better understand how that experience is performing.

Follow these steps to access one of these reports.

1. Click ANALYTICS in the top navigation bar, and then select Experience Results.

monetate.mybigcommerce.com PROD v	DASHBOARD	EXPERIENCES 🗸	AUDIENCES 🗸	COMPONENTS	V DATASETS	ANALYTICS 🗸	٢	۵	
monetate.mybigcommerce.co	m				Session Stream				
					Global Recommen	dations Report			
Showing experiences and account analytics from 30 DAYS V					Custom Reports				

2. Search for the recommendations experience's entry on the Experience Analytics list page.

Experience Analytics		
search by name or type Q		Display
NAME •	STATUS	MODIFICATION V TIME
Product Finder Exp - 10-03-2023	► ACTIVE	Mar 10 2023, 6:49 AM

- 3. Click the experience's name.
- 4. Place your mouse pointer on the **Recommendations** tab, and then select one of the reports from the menu.

BACK TO EXPERIENCE RESULTS		Tiew experience
Summer Recs		
Metrics Real-Time Counts Actions	Recommendations	Start Date: December 15, 2022
★ Goal Metric: Conversion Rate	Strategy Report Action Report Experience Report Product Report	LIVE Last Updated: Mar 13 2023, 10:05 AM Showing metrics for the 1 DAY

The report that you select opens in a new browser tab.

Strategy Report

i

The Recommendation Strategy Report contains various charts and tables that indicate how the recommendation strategy or strategies selected for the experience's recommendations action has performed over the past 7 days. If the experience has multiple recommendations actions, then each one is listed along with its selected recommendation strategy.

If an experience includes a recommendations action that uses a slotted recommendation, then the report lists the individual recommendation strategies that make up the slotted recommendation. The name of the slotted recommendation doesn't appear.

Product Recommendations Report

ntact your Customer Success Manager.	,				
nendation Strategy Report ♡	,				
nendation Strategy Report 🛇					
0, 1				16m ago 📿	÷ 1
Session Date * Action ID GD					
Is any value					
	H	mePa Product Recs			
		Sillery Floudet Rees			
		Experience			
	Respor	ident Cart Revenue Distribution 🛈			
		Cart Revenue (Purchased Clicked	Average Order Value (AOV) - Purchased	Units Per Transaction (UPT) - Purchased	
Action Label	 Algorithm Name 	Recommendation)	Clicked Recommendation)	Clicked Recommendation)	
Action Label Intelligent Recommendations - Slotted	Algorithm Name Viewed Also Viewed- Last Item, Bath	Recommendation) \$0.00	Clicked Recommendation) \$0.00	0	
			\$0.00	Clicked Recommendation) 0 6	
Intelligent Recommendations - Slotted	Viewed Also Viewed- Last Item, Bath	\$0.00	\$0.00	Cricked Recommendation) 0 6 8	
Intelligent Recommendations - Slotted Intelligent Recommendations - Slotted	Viewed Also Viewed- Last Item, Bath Best Sellers Top Revenue- Kitchen textiles	\$0.00	\$0.00	Clicked Recommendation) 0 6 6 8 0	
	is in the last 7 days is any value	Is in the last 7 days Is any value	Is in the last 7 days Is any value HomePg Product Recs	Is in the last 7 days Is any value HomePg Product Recs Experience	Is in the last 7 days Is any value HomePg Product Recs Experience

You can adjust the report's lookback period by selecting and configuring as necessary an option from **Session Date**. After you revise the filter, click the refresh icon.

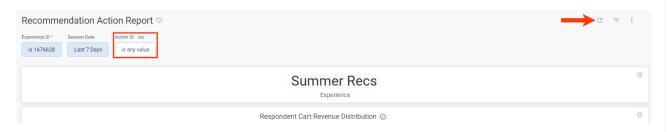
Recomme	ndation Strateg	y Report ♡		→ C =	:
Experience ID * is 1676628	Session Date *	Action ID GD			
	is in the last 👻	7 days 💌 +	Summer Recs		•
			Respondent Cart Revenue Distribution ①		۲

Action Report

The charts and graphs in the Recommendation Action Report help you understand how each recommendations action in a recommendations experience has performed over the last 7 days. Like the Recommendation Strategy Report, the Recommendation Action Report lists each recommendations action if the experience has multiple actions. However, the Recommendation Action Report doesn't include the recommendation strategy selected for each recommendations action in the experience.

d	uct Recor	mmendations R	eport					
Re	ecommendati	on Action Report \heartsuit					12m ago 📿 😇	:
Evo	erience ID * Session	Date Action ID GD						
i	is 1772805 Last	7 Days is any value						
								۲
			ł	HomePg Produce	ct Recs			
				Experience				
				Experience				
			Res	pondent Cart Revenue Distrib	ution (i)			•
			1100					
	Action ID	Action Label		Cart Revenue (Purchased Clicked Recommendation)	Recommendation	alue (AOV) - Purchased Clicked	Units Per Transaction (UPT) - Purchased Cli Recommendation)	скеа
1	4885944	Intelligent Recon	mendations - Slotted		\$595.00	\$297.50	6	
2	4885943	Intelligent Recon	mendations - Slotted	\$332.00		110.67		7
3	4885937	Intelligent Recom	mendations Slider	\$145.00		\$145.00		7
4	4885936	Recs Slider (Slott	ed)	\$125.00		\$125.00	5	
5	4885942	Intelligent Recs		\$60.00	\$60.00		5	
	Action ID	Action Label	Cart Revenue (Clicke	ed but Purchased Other) Verchase	Irder Value (AOV) - Clicked but	Units Per Transaction (U	PT) - Clicked but Purchased Other)	•

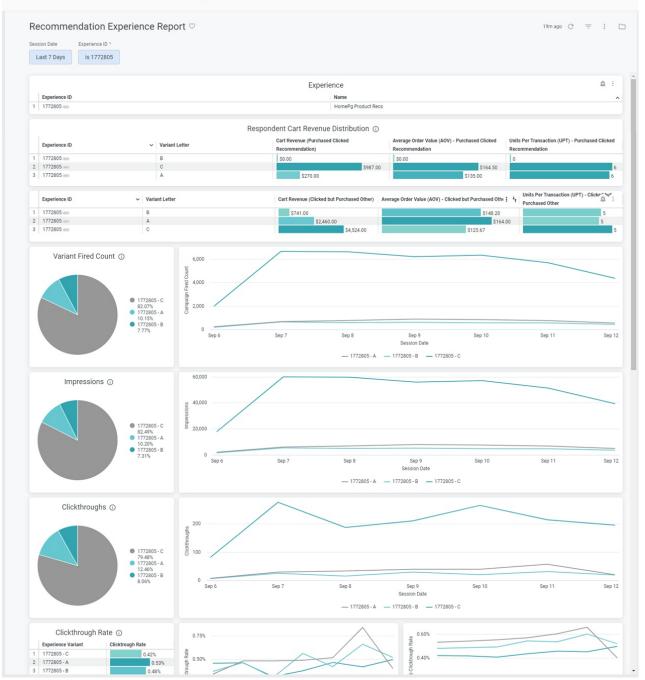
You can adjust the report's lookback period by selecting and configuring as necessary an option from **Session Date**. You can also filter which actions appear in the report by selecting options from **Action ID**. If you adjust any filter, ensure that you click the refresh icon.



Experience Report

This report contains various charts and tables that indicate how an experience is performing, specifically focusing on how each variant is performing.





You can adjust the report's lookback period by selecting and configuring as necessary an option from **Session Date** and then clicking the refresh icon.

Product Report

Select **Product Report** to view a single table of all products directly and indirectly sold due to recommendations.

Product Recommendations Report

Experience ID									10m ago	G =	
is any value	Session Da	^{te} e last 7 days									
	Recommendation Product Report										
Product ID	Title	Description	Impressions	Clickthroughs	Clickthrough	Conversion	Direct Revenue	Total Revenue	Direct Offics	All the second	
Product ID	The	Description	Impressions	Chickeniougna	Rate	Rate After Click	Direct Revenue	Iotal Revenue	Sold	All Units Sole	
R-1911001	French M	10ft French M	86,008	679	Rate	Rate After Click	\$7,231.00	\$30,617.00	Sold 39		
				-							
R-1911001	French M	10ft French M 24in Provenca	86,008	679	0.79%	5.74%	\$7,231.00	\$30,617.00	39		
R-1911001 R-1641010	French M Provenca	10ft French M 24in Provenca	86,008 54,314	679 384	0.79% 0.71%	5.74% 7.55%	\$7,231.00 \$2,601.00	\$30,617.00 \$12,242.00	39 29	All Units Solo	
R-1911001 R-1641010 R-2311002	French M Provenca Outdoor B	10ft French M 24in Provenca Outdoor Blush	86,008 54,314 11,015	679 384 169	0.79% 0.71% 1.53%	5.74% 7.55% 8.28%	\$7,231.00 \$2,601.00 \$2,086.00	\$30,617.00 \$12,242.00 \$10,877.00	39 29 14		

To adjust the report's lookback period, select and configure as necessary an option from **Session Date**, and then click the refresh icon.

Using Filters

The default filters applied to a report appear below the report title. Click the filters icon to hide or show the filters.

Global Reco	ommendatio	ons Reports	
Account Summary	All Experiences	All Products	
	dation Experience	e Report (All) ♡ 🥃	: 0
Session Date	Experience ID is any value	رج ۲۶	
		Experience	

To adjust a filter, click it and then select an option. After you revise the filter(s), click the refresh icon.

To restore a report's filters to their defaults, click the additional options menu (:), and then select Reset filters.



Global Recommendations Reports

Account Sum	nary All Experiences	All Products					
Recor	nmendation Experie	nce Report (All) ♡			just now 📿	Ŧ	
Session Dat				£	Clear cache and refresh	îctrl₽	
East 90	is diff value			₽	Download	alt⊕D	
		Experi	ence		Schedule delivery	altŷS	
Exp	erience ID	^	Name				1
3 155	4929		Lee DXC	Ŧ	Reset filters	ctrlaltR	-
4 156	9273		Rohit PF				-
5 168	9352		Bundle Recommendation	⊕	Each tile's time zone		
6 172	6923		REC-slotting		America - Chicago, unless othe	erwise noted	-

You cannot remove a filter from nor add additional ones to any report.

Downloading Reports

You can download a report as a PDF or CSV file. First, click the additional options menu (:), select **Download**, and then select the file format. If you select **PDF**, you can select the paper size and choose certain other format options.

Recommendation Expe	erience Repor	+				C ≠ : ⊡
Session Date Experience ID		Download Recommendati	on Experience	Report		
Last 7 Days is any value		Format				
		PDF		Ŧ		
		Paper Size				
Experience ID		Fit Page To Dashboard		~		
		Expand tables to show all rov	vs (j)			
4		Arrange dashboard tiles in a	single column			Þ
Experience ID	✓ Variant Letter	Open in Browser	Cancel	Download	\OV) - Purchased	Units Per Order (UPO) - Purchased Clicked Recommendation)

Click Download to generate the report, and then choose a location to save it.

Scheduling Report Deliveries

You can automatically generate and share a report on a schedule that you establish in Monetate. First, click the additional options menu (:), and then select **Schedule delivery**.

Global Recommendations Reports

unt Summai	y All Expe	riences A	Il Products	_						
Recomm	endation Pr	oduct Repo	ort ♡						just now 📿	Ŧ
Experience ID	Session Date							£	Clear cache and refresh	îctrl₽
is any value	is in the last	7 days						Ŧ	Download	altŷD
				Recomme	endation Prod	uct Report	_	→	Schedule delivery	altûS
Product ID	Title	Description	Impressions	Clickthroughs	Clickthrough R: 🗸	Conversion Rat	Direct Revenue			
88	Chemex Coffee	The Chemex Co	5	0	0.00%	0.00%	\$0.00	- -	Reset filters	ctrlaltR
97	Tiered Wire Bas	Here's a three ti	1	0	0.00%	0.00%	\$0.00			
77	Testing Title Na	The perfect bea	5	0	0.00%	0.00%	\$0.00	•	Each tile's time zone	
94	Oak Cheese Gra	Crafted from oa	4	0	0.00%	0.00%	\$0.00		America - Chicago, unless otherw	/ise noted

On the **Settings** tab of the Schedule Delivery modal, select how frequently you want the report generated and the timing associated with that choice. Choose an option from **Destination** to determine how you want to share the report (for example, by email to specific recipients, to a specific cloud location, via SFTP to a private directory). Finally, select the report format: PDF, CSV file, or image.

Schedule	e Delive	ery				
Settings	Filters	Advanced option	IS			
Schedule Name						
Recommen	dation Proc	luct Report				
Recurrence				Time		
Daily			~	06:	00	$\overline{\mathbf{v}}$
Destination						
🔛 Email						Ŧ
Email addresses	*			AII (0)	Exte	ernal (0
						0
At least one ema	ail is required					
Format						
DF 应						Ψ.
Test now		C	ance			

Optionally, click the **Filters** tab to adjust as necessary the filters that are available for the report that you're scheduling.

Schedule Delivery

L.

Settings	Filters	Advanced options	
Experience ID	3		
Session Date			
is in the las	st 7 days		
			_
Test now		Cancel	Save

The settings that appear on the **Advanced options** tab are determined by the option you selected from **Destination** and from **Format** on the **Settings** tab. The options on the **Advanced options** tab allow you to customize the layout, appearance, or formatting of the report data in the file generated. The one option that always appears on the **Advanced options** tab is **Delivery timezone**.

.

Schedule Delivery

Settings	Filters	Advanced options	
Custom Messa	ge		0/1500
Add a mess	sage to be ir	ncluded in the body of the en	nail.
🗹 Include li	inks		//
Expand t	ables to sho	ow all rows 🛈	
		ow all rows 🛈	
		-	
Arrange		iles in a single column	Ŧ
Arrange	dashboard t Dashboard	iles in a single column	Ŧ
Arrange	dashboard t	iles in a single column	
Arrange aper size Fit Page To	dashboard t Dashboard ne	iles in a single column	

The screenshot above shows the options available on the **Advanced options** tab for a weekly PDF report sent via email.

After you configure the schedule and report formatting options, click **Save** to close the Schedule Delivery modal.