


Product Recommendations Analytics

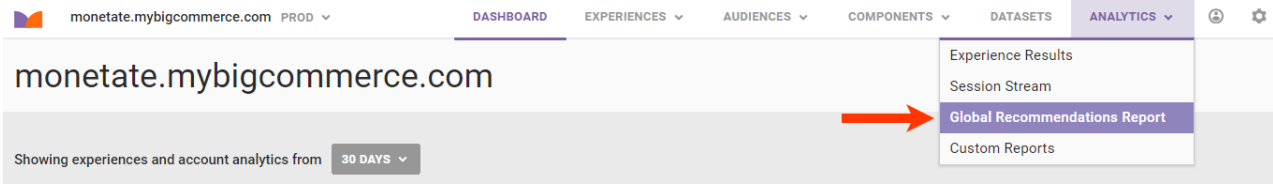
You can access three global reports and four experience-level reports, all with specific filters applied, within Monetate. They help you better understand how recommendations are performing at the account level and experience level.

 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

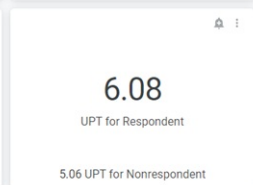
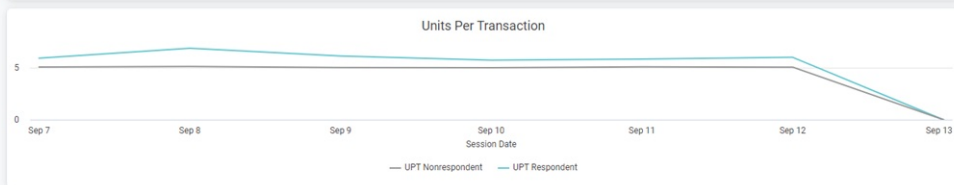
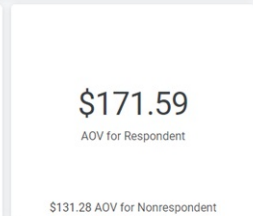
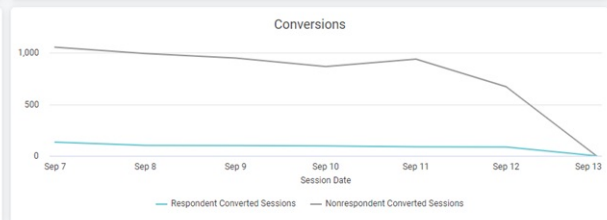
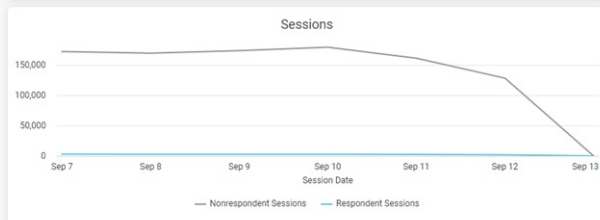
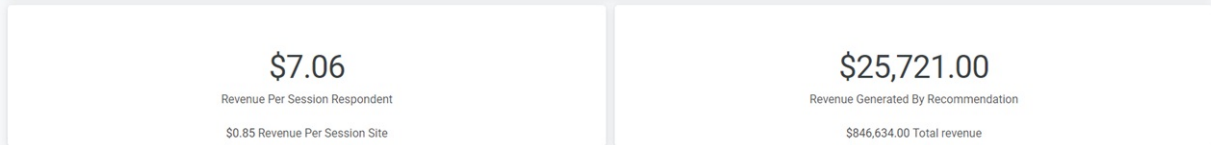
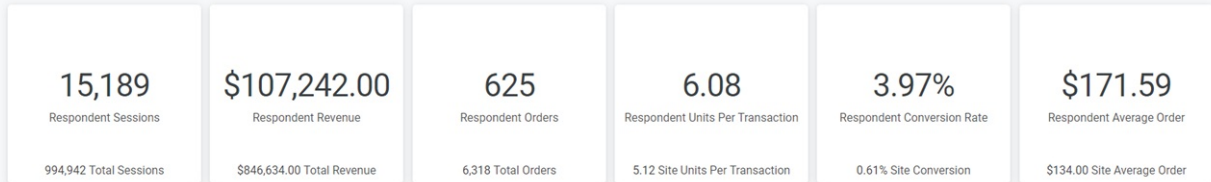
Account Summary All Experiences All Products

Recommendation Account Report

8m ago

Session Date

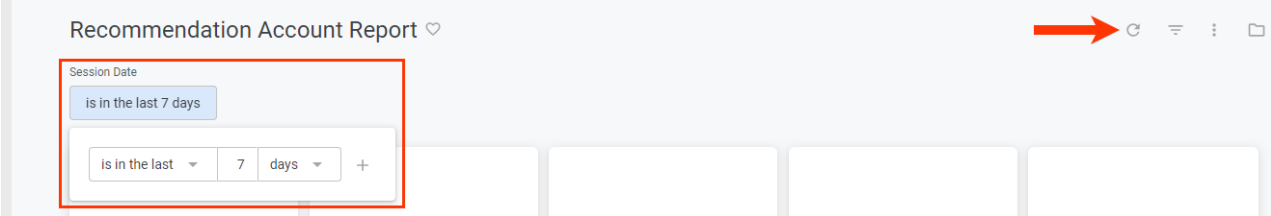
is in the last 7 days



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

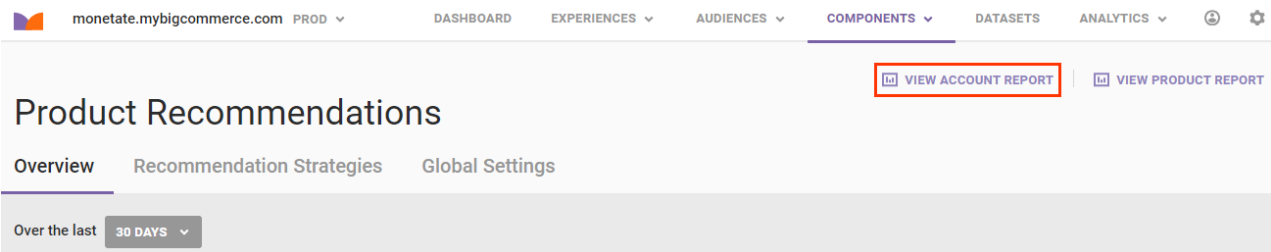


Recommendation Account Report

Session Date
is in the last 7 days

is in the last 7 days +

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.



monetate.mybigcommerce.com PROD DASHBOARD EXPERIENCES AUDIENCES COMPONENTS DATASETS ANALYTICS

VIEW ACCOUNT REPORT VIEW PRODUCT REPORT

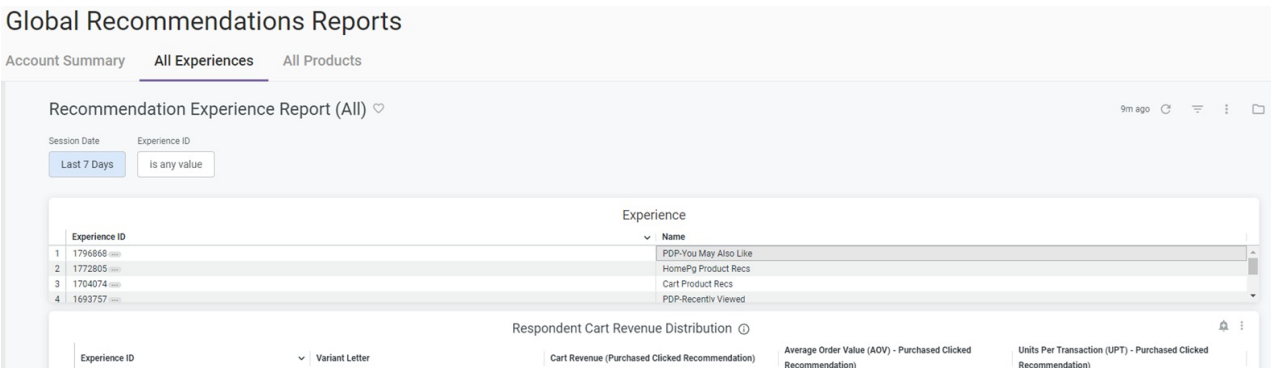
Product Recommendations

Overview Recommendation Strategies Global Settings

Over the last 30 DAYS

All Recommendations Experiences Report

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



Global Recommendations Reports

Account Summary All Experiences All Products

Recommendation Experience Report (All)

Session Date Experience ID
Last 7 Days is any value

Experience ID	Name
1796868	PDP>You May Also Like
1772805	HomePg Product Recs
1704074	Cart Product Recs
1693757	PDP-Recently Viewed

Respondent Cart Revenue Distribution

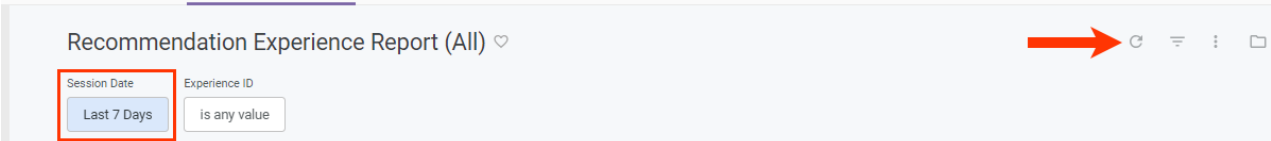
Experience ID Variant Letter

Cart Revenue (Purchased Clicked Recommendation) Average Order Value (AOV) - Purchased Clicked Recommendation Units Per Transaction (UPT) - Purchased Clicked Recommendation

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.

Global Recommendations Reports

Account Summary All Experiences All Products



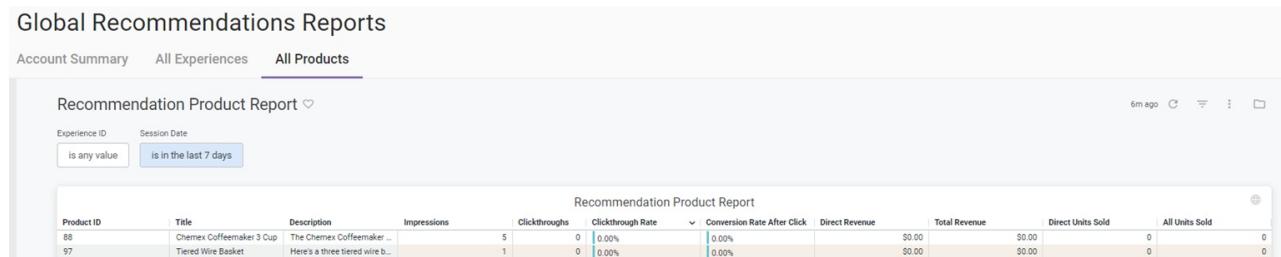
Recommendation Experience Report (All)

Session Date Experience ID
Last 7 Days is any value

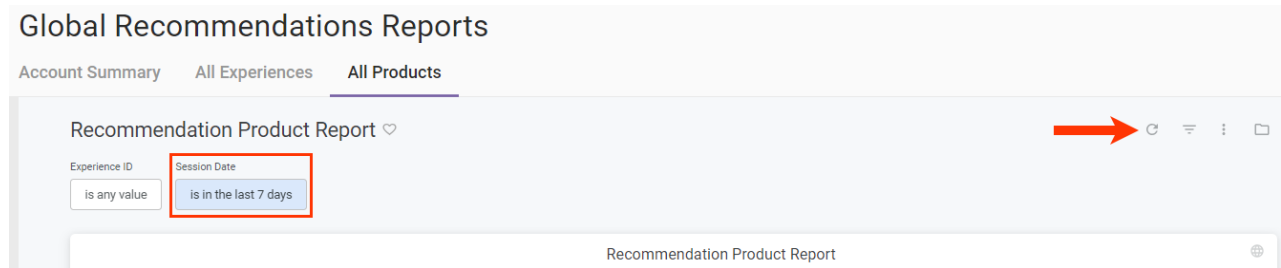
You can also narrow the scope of the report by clicking **Experience ID** and then selecting one or more IDs.

Product Report

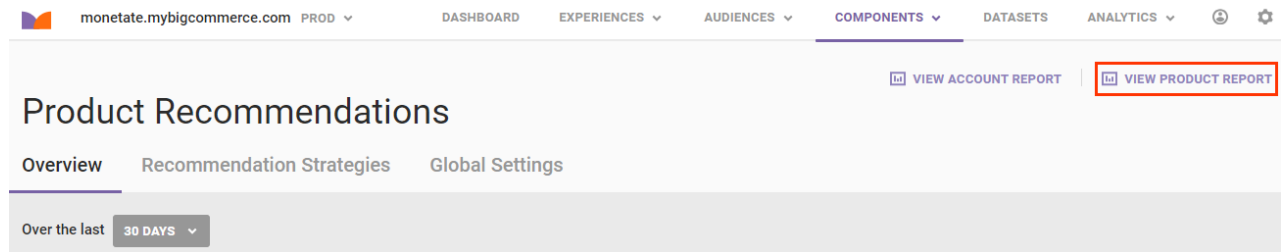
Click the **All Products** tab to view the Recommendation Product Report. It contains information about all the products sold either directly or indirectly through recommendations for the account.



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



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.



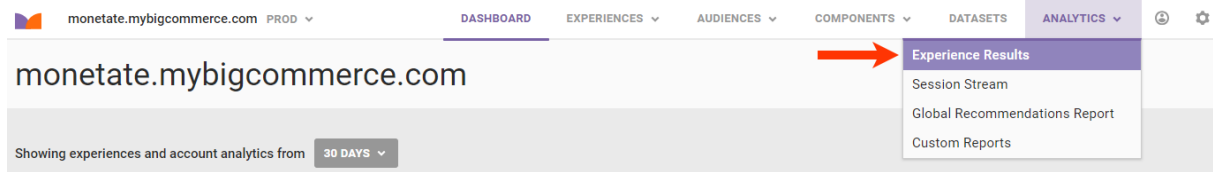
While you can view an experience-specific version of this report by selecting its ID from **Experience ID**, you can better access it from the experience's Experience Results page. See [Product Report in the Experience-Level Reports](#) section of this documentation for more information.

Experience-Level Reports

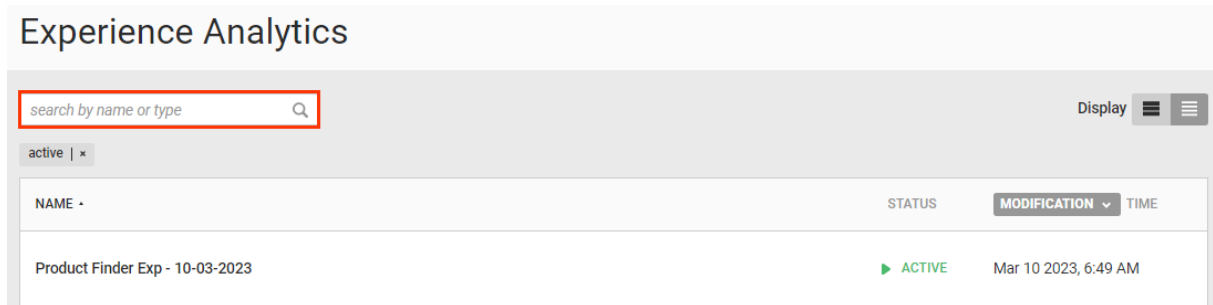
Four reports about different aspects of a specific recommendations experience are available so that you can better understand how that experience is performing.

Follow these steps to access one of these reports.

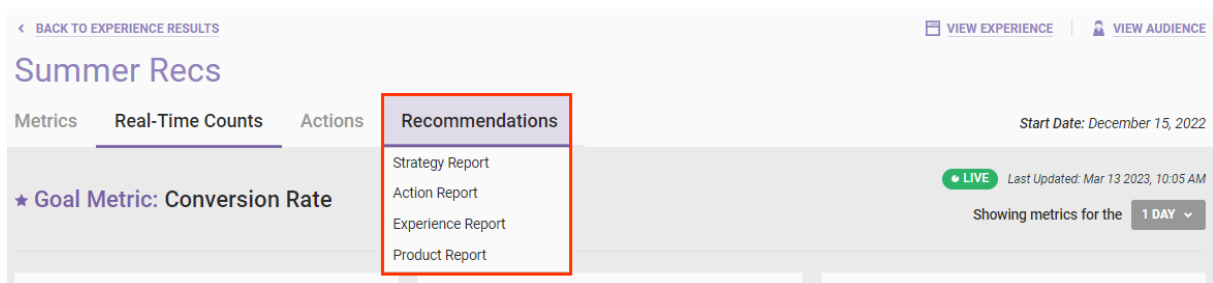
1. Click **ANALYTICS** in the top navigation bar, and then select **Experience Results**.



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



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.



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

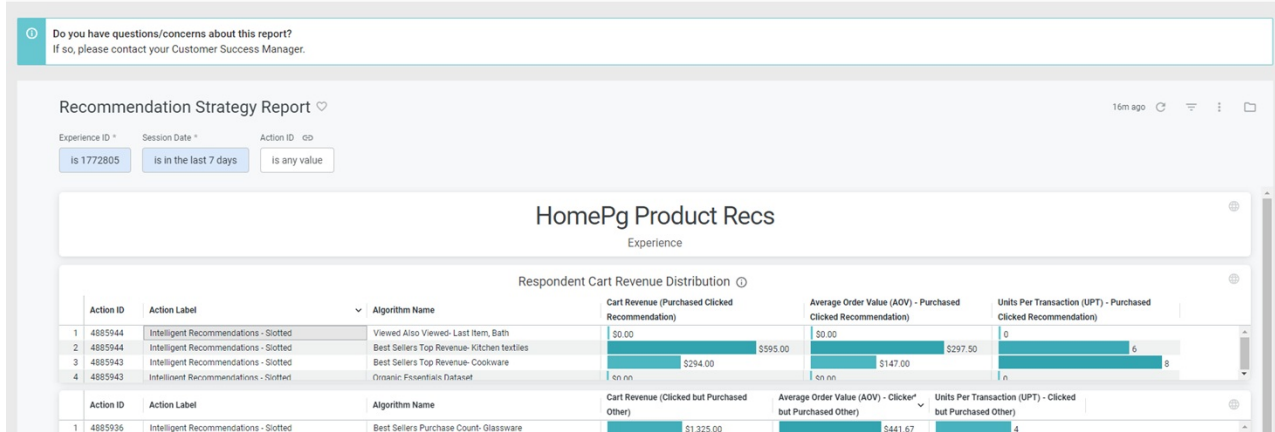
Strategy Report

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.

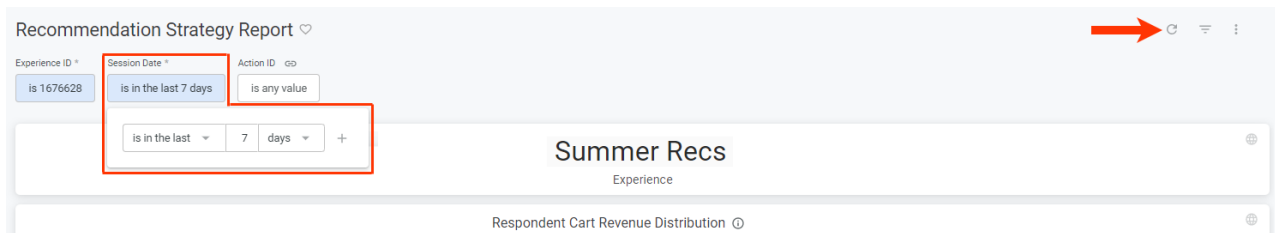


If an experience includes a recommendations action that uses a [slotted recommendation](#), then the report lists the individual recommendation strategies that make up the slotted recommendation. The name of the slotted recommendation doesn't appear.

Product Recommendations Report



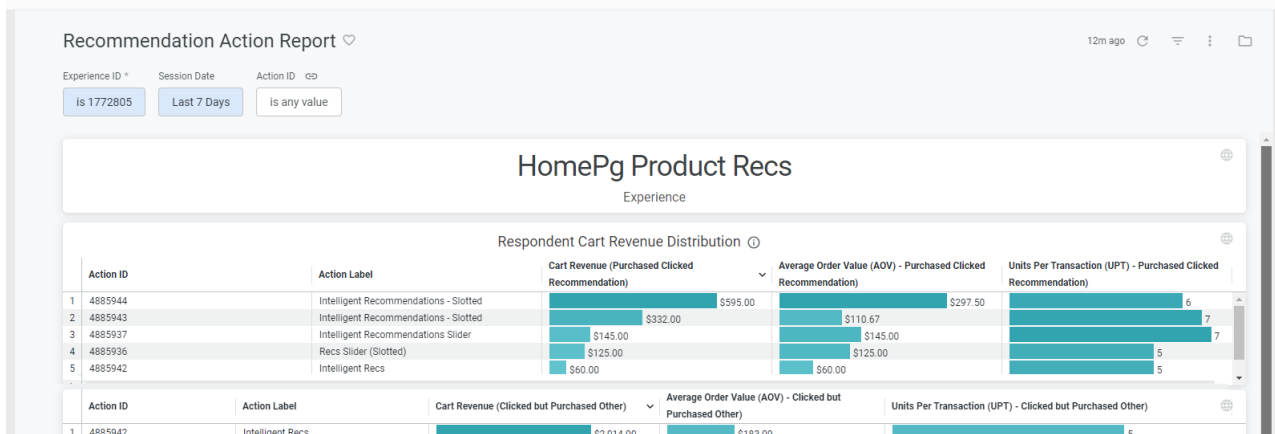
You can adjust the report's lookback period by selecting and configuring as necessary an option from **Session Date**. After you revise the filter, click the refresh icon.



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.

Product Recommendations Report



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.

Recommendation Action Report

Experience ID * is 1676628 Session Date Last 7 Days Action ID * is any value

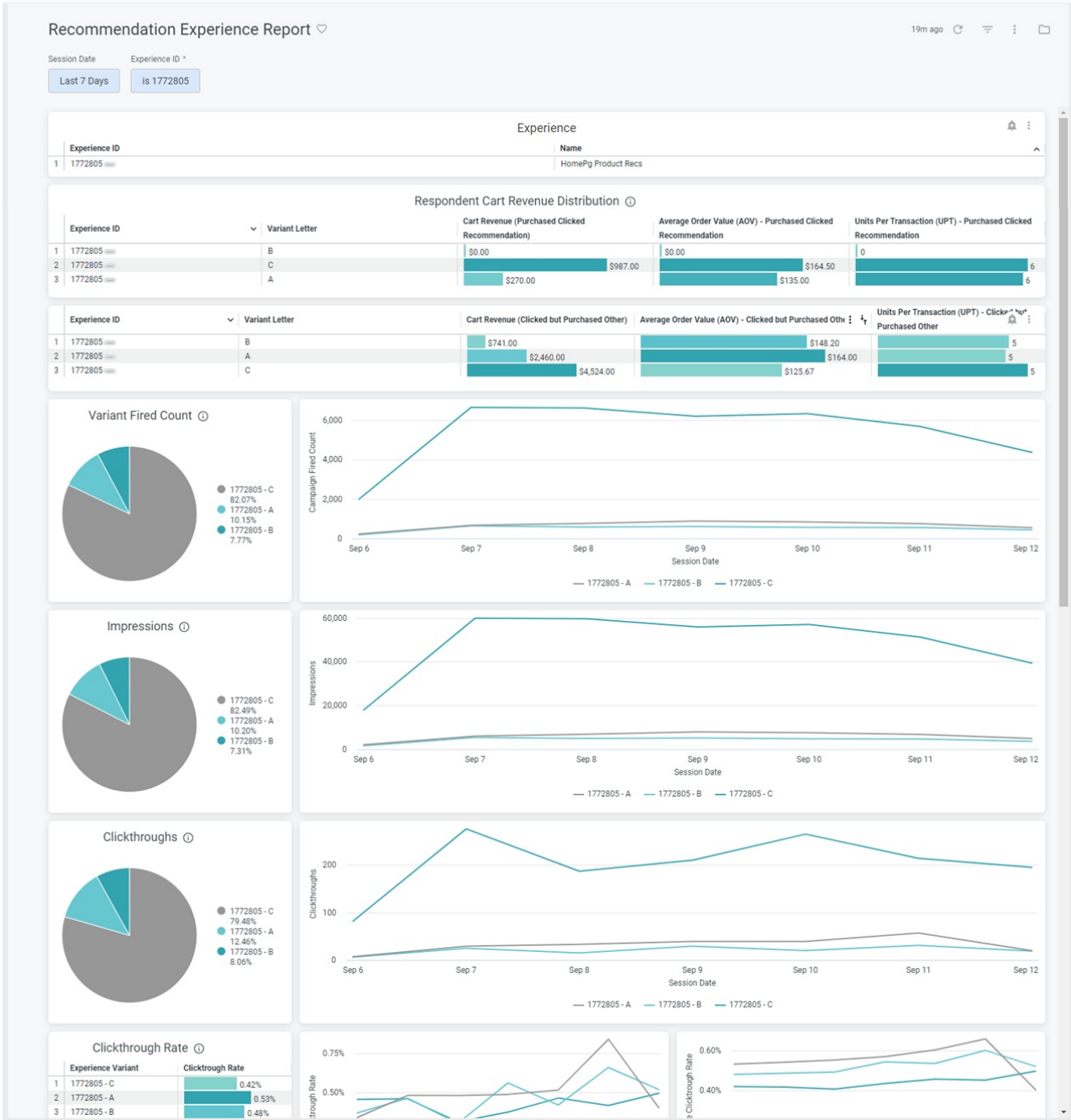
Summer Recs
Experience

Respondent Cart Revenue Distribution

Experience Report

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

Product Recommendations Report



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

Product ID	Title	Description	Impressions	Clickthroughs	Clickthrough Rate	Conversion Rate After Click	Direct Revenue	Total Revenue	Direct Units Sold	All Units Sold
R-1911001	French M...	10ft French M...	86,008	679	0.79%	5.74%	\$7,231.00	\$30,617.00	39	163
R-1641010	Provenca...	24in Provenca...	54,314	384	0.71%	7.55%	\$2,601.00	\$12,242.00	29	128
R-2311002	Outdoor B...	Outdoor Blush...	11,015	169	1.53%	8.28%	\$2,086.00	\$10,877.00	14	73
R-1841010	10ft Outd...	10ft Outdoor ...	21,627	162	0.75%	4.32%	\$1,503.00	\$11,119.00	7	51
R-1641024	22in Outd ...	22in Outdoor ...	21,302	180	0.84%	2.22%	\$796.00	\$9,720.00	4	50
R-2211003	28in Outd ...	28in Outdoor ...	22,419	142	0.63%	3.52%	\$1,105.00	\$10,461.00	5	49

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.

Experience	Impressions	Clickthroughs	Clickthrough Rate	Conversion Rate After Click	Direct Revenue	Total Revenue	Direct Units Sold	All Units Sold
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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**.



Clicking **Reset filters** removes the experience ID if you're viewing an experience-specific report.

Global Recommendations Reports

Account Summary **All Experiences** All Products

Recommendation Experience Report (All) just now 🔄 ☰ 🗂

Session Date: **Last 90 Days** Experience ID:

Experience ID	Name
3 1554929	Lee DXC
4 1569273	Rohit PF
5 1689352	Bundle Recommendation
6 1726923	REC-slotting

- Clear cache and refresh ⌘ctrlR
- Download alt⌘D
- Schedule delivery alt⌘S
- Reset filters ctrl⌘R
- Each tile's time zone
America - Chicago, unless otherwise 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.

Download Recommendation Experience Report

Format:

Paper Size:

Expand tables to show all rows ⓘ

Arrange dashboard tiles in a single column

Open in Browser Cancel **Download**

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

Account Summary All Experiences **All Products**

Recommendation Product Report just now 🔄 ☰ 📁

Experience ID Session Date

Recommendation Product Report

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
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
94	Oak Cheese Gra...	Crafted from oa...	4	0	0.00%	0.00%	\$0.00
107	Dustpan & Brush	A seemingly sl...	1	0	0.00%	0.00%	\$0.00

☰ Clear cache and refresh ⌘ctrl+R
📄 Download alt+D
📅 Schedule delivery alt+S
🔄 Reset filters ctrl+alt+R
🌐 Each tile's time zone
America - Chicago, unless otherwise 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 Delivery

Settings Filters Advanced options

Schedule Name

Recurrence Time

Destination

Email addresses * All (0) External (0)

At least one email is required

Format

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

Schedule Delivery

Settings

Filters

Advanced options

Experience ID

is 1676628

Session Date

is in the last 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 Message 0/1500

Add a message to be included in the body of the email.

Include links

Expand tables to show all rows ⓘ

Arrange dashboard tiles in a single column

Paper size

Fit Page To Dashboard▼

Delivery timezone

America - Chicago▼

Test now Cancel Save

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.