

Configure a Social Proof Action

If you want to add Monetate's Social Proof feature to your account, contact your dedicated Customer Success Manager (CSM).

A customer behavior–based Social Proof action allows you to deliver customized social influence messages that notify shoppers if products they're viewing are popular with other customers based on how many times the products were viewed, purchased, or added to a fellow shopper's cart.

Refer to [Create an Inventory-Based Social Proof Action](#) if you want to display social proof messaging based on inventory levels with the aim of generating the fear of missing out on popular products amongst visitors browsing your site. See [Create a Recommendation Strategy–Based Social Proof Action](#) if you want to display social proof messaging that's influenced by the customer's viewing and purchasing history on products they're more likely to buy.

You can deploy customer behavior–based Social Proof messages on product detail pages or on pages of your site that display multiple product IDs, such as product category listings, search results, and cart pages.

Contact your dedicated CSM to request that a Social Proof action template for use on pages that display multiple products be added to your account.

Follow the appropriate steps to create an experience with social proof messaging based on customer behavior.

On Product Detail Pages

Follow these steps to configure a Web experience with a Social Proof action to display a message based on customer behavior on product detail pages.

1. Create a new Web experience, and then configure the **WHY** and **WHO** settings.
2. Click **WHAT** and then click **ADD ACTION**.
3. Click **Social Proof** on the Action Type panel, and then click an HTML-based action template configured for use on product detail pages.

Template names may vary, and templates in your account may not include configuration specifics shown.

4. Select an option from the CUSTOMER BEHAVIOR category in **Social Proof Type** to determine the basis for the message:

- **Viewed:** The number of times customers viewed a specific product detail page
- **Carted:** The number of times customers placed a specific product in their carts
- **Purchased:** The number of times customers bought a specific product

A count is tallied for every product ID in an account.

5. Configure how much historical data is used. Select an option from **Lookback Period**, and then type into the text field the number of hours, days, or weeks that falls within the range that appears in parentheses alongside your selection.
- The default lookback setting is **Days (1–6)**, and the default for the text field is 1.
 - If you select **Minutes (5–55)**, then you must enter an increment of 5 into the text field.
 - An error message appears if you type a number that is outside the stated range for the option you select.

6. Type into **Minimum Threshold** the minimum number of times the event that you selected in step 4 must have occurred within the lookback period before this action fires.

The default setting for **Minimum Threshold** is 2.

7. Optionally, type into **Maximum Threshold** the maximum number of times the event that you selected in step 4 must have occurred within the lookback period before the action alters its behavior. Next, select how the action behaves once it meets the maximum threshold:
- **Display No Social Proof Action:** No message appears
 - **Aggregate Count:** The action displays "[maximum threshold] +" instead of the actual count within the body of the message as you craft it in step 8

The default setting for **Maximum Threshold** is **No limit**, and the **SELECT SOCIAL PROOF DISPLAY PREFERENCE** selector is disabled until you type a number into **Maximum Threshold**. Therefore, only modify **Maximum Threshold** if you want the action to change if a product becomes too popular.

8. Optionally, customize the default message that appears in **Social Proof Message**, or replace the default message with a different one.
- The default message that appears in the editor that is based on the Social Proof type you selected in step 4 and the lookback period you set in step 5.
 - If you replace the default message, you must include `{{count}}` to have it replaced with the number of times the product has been viewed, placed in a cart, or purchased, as based on the option you selected from **Social Proof Type**.

If you delete the default message and fail to input any message, the default message still appears when the action fires.

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- Input the element selector in **Relative Element Selector**. See [Element Selectors](#) for more information about how to use this field.
 - Select from **Insert Method** where the message should appear in relation to the selector you input in the previous step.
 - Optionally, add any of the following settings to the action:
 - In the appropriate editor, input, upload, or select JavaScript code that already exists in the account for any JavaScript creative you want to appear as part of the message.
 - In the appropriate editor, input, upload, or select CSS code that already exists in the account that you want appended to the DOM in a `<style>` or `<link>` element.
 - Toggle **Select multiple elements, if matched?** to **YES** if you want the message to appear in multiple places if multiple elements match the specified relative element selector.
 - Toggle **Re-check for Elements** toggle to **YES** if you want the platform to recheck every 50 milliseconds for up to 3 seconds if the specified element is not immediately found.
 - Toggle **Only run once?** to **YES** if you want the platform to insert the JavaScript only on the first track.
 - Optionally, specify additional criteria that must be met for the action to fire by selecting one of the options from **ADD CONDITION**, and then typing into the respective input field the necessary information to complete the [action condition](#).
 - Click **CREATE**.

On Pages Displaying Multiple Product IDs

Follow these steps to configure a Web experience with a Social Proof action to show a message based on customer behavior on pages of your site that display multiple product IDs.

- Create a new Web experience, and then configure the **WHY** and **WHO** settings.
- Click **WHAT** and then click **ADD ACTION**.
- Click **Social Proof** on the Action Type panel, and then click an action template configured for use either on pages displaying multiple product IDs, such as product category listings and search results, or specifically on the cart page.

Template names may vary, and templates in your account may not include configuration specifics shown.

- Select an option from the CUSTOMER BEHAVIOR category in **Social Proof Type** to determine the basis for the message:
 - Viewed**: The number of times customers viewed a specific product detail page

- **Carted:** The number of times customers placed a specific product in their carts
- **Purchased:** The number of times customers bought a specific product

A count is tallied for every product ID in an account.

5. Configure how much historical data is used. Select an option from **Lookback Period**, and then type into the text field the exact number of hours, days, or weeks that falls within the range that appears in parentheses alongside your selection.
- The default lookback setting is **Days (1–6)**, and the default for the text field is 1.
 - If you select **Minutes (5–55)**, then you must enter an increment of 5 into the text field.
 - An error message appears if you type a number that is outside the stated range for the option you select.

6. Type into **Minimum Threshold** the minimum number of times the event that you selected in step 4 must have occurred within the lookback period before this action fires.

The default setting for **Minimum Threshold** is 2.

7. Optionally, type into **Maximum Threshold** the maximum number of times the event that you selected in step 4 must have occurred within the lookback period before the action alters its behavior. Next, select how the action behaves once it meets the maximum threshold:
- **Display No Social Proof Action:** No message appears
 - **Aggregate Count:** The action displays "[maximum threshold]+" instead of the actual count within the body of the message as you craft it in step 9

The default setting for **Maximum Threshold** is **No limit**, and the **SELECT SOCIAL PROOF DISPLAY PREFERENCE** selector is disabled until you type a number into **Maximum Threshold**. Therefore, only modify **Maximum Threshold** if you want the action to change if a product becomes too popular.

8. Optionally, type into **Maximum Messages per Page** the total number of messages that can appear on one page. The default setting is **No limit**.

If the number of products that are eligible for the Social Proof message exceeds the per-page limit that you set in **Maximum Messages per Page**, then the Social Proof message appears on the products on the page that have the highest counts for the Social Proof type that you selected in step 4.

9. Optionally, customize the default message that appears in **Social Proof Message**, or replace the default

message with a different one.

- The default message that appears in the editor that is based on the Social Proof type you selected in step 4 and the lookback period you set in step 5.
- If you replace the default message, you must include `{{count}}` to have it replaced with the number of times the product has been viewed, placed in a cart, or purchased, as based on the option you selected from **Social Proof Type**.

If you delete the default message and fail to input any message, the default message still appears when the action fires.

10. Input the element selector in **Relative Element Selector**. See [Element Selectors](#) for more information about how to use this field.
11. Select from **Insert Method** where the message should appear in relation to the selected element you input in the previous step.
12. Optionally, in the appropriate editor, input, upload, or select any JavaScript creative or CSS code that already exists in the account that you want to appear as part of the message.
13. Toggle **Select multiple elements, if matched?** to **YES** if you want the message to appear in multiple places if multiple elements match the specified relative element selector.

You must toggle **Select multiple elements, if matched?** to **YES** if you want the message to appear for all SKUs of a product ID if each SKU is listed separately on the page.

14. Optionally, toggle **Re-check for Elements** toggle to **YES** if you want the platform to recheck every 50 milliseconds for up to 3 seconds if the specified element is not immediately found.
15. Optionally, toggle **Only run once?** to **YES** if you want the platform to insert the JavaScript only on the first track.
16. Optionally, specify additional criteria that must be met for the action to fire by selecting one of the options from **ADD CONDITION**, and then typing into the respective input field the necessary information to complete the [action condition](#).
17. Click **CREATE**.