

Configure an Omnichannel Social Proof Action



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

Follow the appropriate steps to configure a Social Proof action for an Omnichannel experience with Social Proof messages based on customer behavior, on inventory, or on a recommendation strategy.

Messages Based on Customer Behavior

A customer behavior–based Social Proof action in an Omnichannel experience 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.

Follow these steps to create a Social Proof action with messages based on customer behavior.

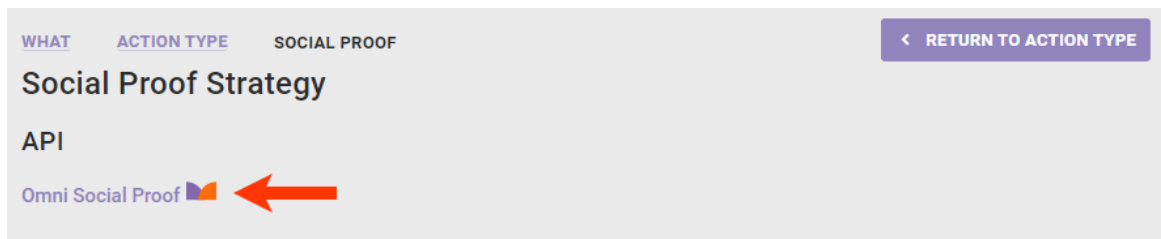
1. Create an [Omnichannel experience](#), and then configure the WHY and WHO settings.
2. Click **WHAT** and then click **ADD ACTION**.

The screenshot shows the configuration page for a Social Proof action titled "Social Proof—Products Viewed". At the top, there are navigation links for "BACK TO WEB EXPERIENCES" and "VIEW ANALYTICS". The page includes an "ACTIVATE" button, a "PREVIEW" dropdown, a "DUPLICATE" dropdown, and a menu icon. Below this, it shows the action is in "DRAFT" status, created on "Feb 20 2025, 1:45 PM", with an "ADD TAGS" button. The configuration is divided into sections: "WHY" (placeholder: "Select your experience type and goal..."), "WHO" (set to "For all visitors"), "WHAT" (set to "Add action..." and highlighted with a red border), and "WHEN" (set to "from Feb 20 2025, 1:45 PM ongoing"). At the bottom right, a red arrow points to a green "ADD ACTION" button.

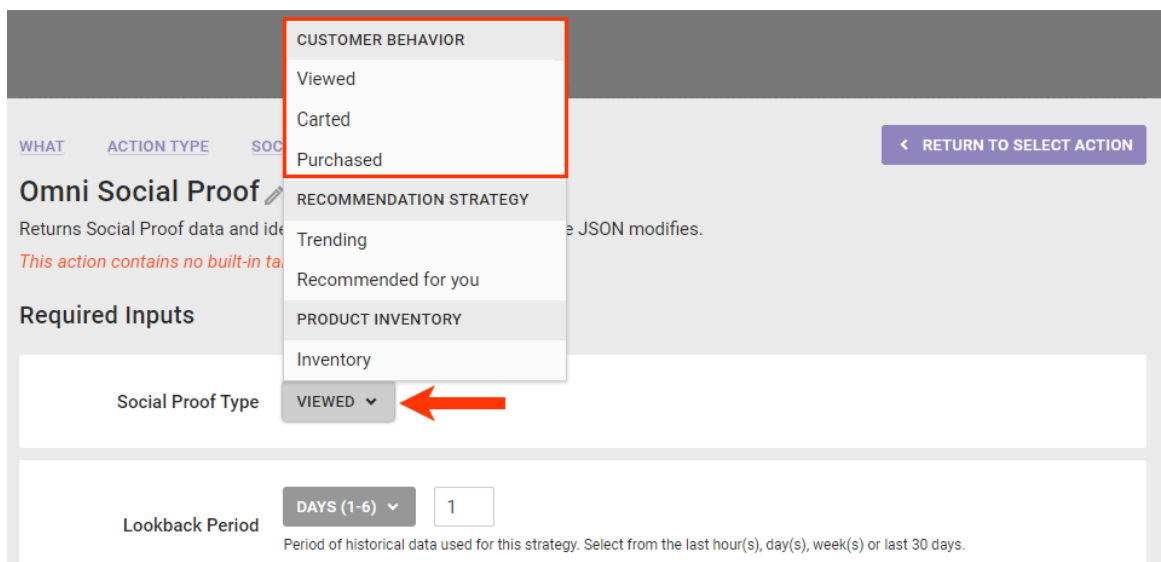
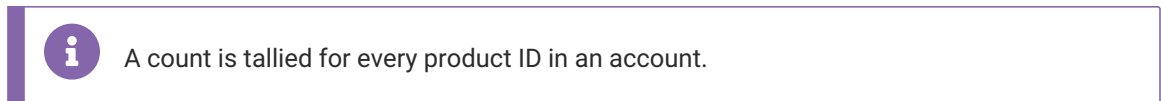
3. Click **Social Proof** on the Action Type panel, and then click the action template.



Template names may vary.



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




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.

Omni Social Proof

Returns Social Proof data and identifies which region/component the JSON modifies.

This action contains no built-in targeting.

Required Inputs

Social Proof Type	<input type="text" value="VIEWED"/>
Lookback Period	<input type="text" value="DAYS (1-6)"/> <input type="text" value="1"/> 


Period of historical data used for this strategy. Select from the last hour(s), day(s), week(s) or last 30 days.

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.

Required Inputs

Social Proof Type	<input type="text" value="VIEWED"/>
Lookback Period	<input type="text" value="DAYS (1-6)"/> <input type="text" value="1"/>
Minimum Threshold	<input type="text" value="2"/> 

For customer behavior types: this is the minimum number of events required to show Social Proof messaging.

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 messages 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**. 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.

Required Inputs

Social Proof Type: VIEWED ▾

Lookback Period: DAYS (1-6) ▾ 1
Period of historical data used for this strategy. Select from the last hour(s), day(s), week(s) or last 30 days.

Minimum Threshold: 2
For customer behavior types: this is the minimum number of events required to show Social Proof messaging.

Maximum Threshold: 15
For customer behavior types: this is the maximum number of events required to disable Social Proof messaging or show the Maximum Threshold as the count (most customer behavior types do not require a limit).

SELECT SOCIAL PROOF DISPLAY PREFERENCE ▾
 Select Social Proof Display Preference
 Display No Social Proof Action
 Aggregate Count

8. If the action targets pages displaying multiple product IDs, such as category product list pages, search results pages, or the cart page, then optionally type into **Maximum Messages per Page** the total number of messages you want to appear on a page. The default setting is **No limit**.

i If the number of products that are eligible for the Social Proof message exceeds the per-request 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.

Required Inputs

Social Proof Type: VIEWED ▾

Lookback Period: DAYS (1-6) ▾ 1
Period of historical data used for this strategy. Select from the last hour(s), day(s), week(s) or last 30 days.

Minimum Threshold: 2
This is the minimum number of events required to show Social Proof messaging.

Maximum Threshold: No limit
This is the maximum number of events required to disable Social Proof messaging or show the Maximum Threshold as the count (most customer behavior types do not require a limit).

Maximum Messages per Page: No limit
Set the maximum number of Social Proof messages you would like shown on a single page.

9. Optionally, input into **Component** the region or component with which the action is associated (for

example, a relative element selector, component name, or component ID).

Optional Inputs

Component

The region or component with which this action is associated (e.g. CSS selector, component name, component ID)

10. 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 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.

11. If you want to specify additional criteria that must be met for the action to fire, select an option from **ADD CONDITION**, and then type into the respective input field the necessary information to complete the [action condition](#).
12. Click **CREATE**.

In addition to configuring the Social Proof action, you must also configure the appropriate request to the Engine API. See [Configuring the Engine API Request](#) in this documentation for more information.

Messages Based on Inventory

Follow these steps to configure a Social Proof action with messages based on product inventory.

1. Create an [Omnichannel experience](#), and then configure the WHY and WHO settings.

2. Click **WHAT** and then click **ADD ACTION**.

BACK TO WEB EXPERIENCES VIEW ANALYTICS

Social Proof—Inventory ACTIVATE PREVIEW DUPLICATE

DRAFT | Created: Feb 20 2025, 1:45 PM

+ ADD TAGS

WHY Select your experience type and goal...

WHO For all visitors

WHAT **A** Add action...

WHEN from Feb 20 2025, 1:45 PM ongoing

WHAT ADD ACTION

3. Click **Social Proof** on the Action Type panel, and then click the action template.

Template names may vary.

WHAT ACTION TYPE SOCIAL PROOF RETURN TO ACTION TYPE

Social Proof Strategy

API

Omni Social Proof RETURN TO SELECT ACTION

4. Select **Inventory** from **Social Proof Type**.

WHAT ACTION TYPE SOCIAL PROOF RETURN TO SELECT ACTION

Omni Social Proof

Returns Social Proof data and identifies the product catalog that contains the product inventory count you want to serve as a basis for the action. *This action contains no built-in tags.*

Required Inputs

Social Proof Type **Inventory**

Lookback Period **DAYS (1-6)** 1

Period of historical data used for this strategy. Select from the last hour(s), day(s), week(s) or last 30 days.

5. Select a product catalog from **Inventory Data Source** that contains the product inventory count you want to serve as a basis for the action.



The product catalog that you select must include the **quantity** field in which inventory is passed to Monetate.

Required Inputs

Social Proof Type

INVENTORY ▾

Inventory Data Source

CK_PRODUCTS ▾

Select the Product Catalog with appropriate inventory data.



6. Type into **Inventory Threshold** the product inventory count to serve as the upper limit for triggering the message.



So long as a product's inventory is between 1 and the number you input into **Inventory Threshold**, the message appears. The message does not appear when either a product's inventory is zero or is greater than the number you input into **Inventory Threshold**.

Required Inputs

Social Proof Type

INVENTORY ▾

Inventory Data Source

CK_PRODUCTS ▾

Select the Product Catalog with appropriate inventory data.

Inventory Threshold

10

Between this value and 1, show Social Proof messaging.




7. If the action targets pages displaying multiple product IDs, such as category product list pages or search results pages, or the cart page, then optionally type into **Maximum Messages per Page** the total number of messages you want to appear on a page. The default setting is **No limit**.



If the number of products that are eligible for the Social Proof message exceeds the per-request limit that you set in **Maximum Messages per Page**, then the Social Proof message appears on the products with the lowest inventory counts on the page.

Required Inputs

Social Proof Type	INVENTORY ▾
Inventory Data Source	CK_PRODUCTS ▾ Select the Product Catalog with appropriate inventory data.
Inventory Threshold	10 Between this value and 1, show Social Proof messaging.
Maximum Messages per Page	No limit  Set the maximum number of Social Proof messages you would like shown on a single page.

8. Optionally, input into **Component** the region or component with which the action is associated (for example, a relative element selector, component name, or component ID).

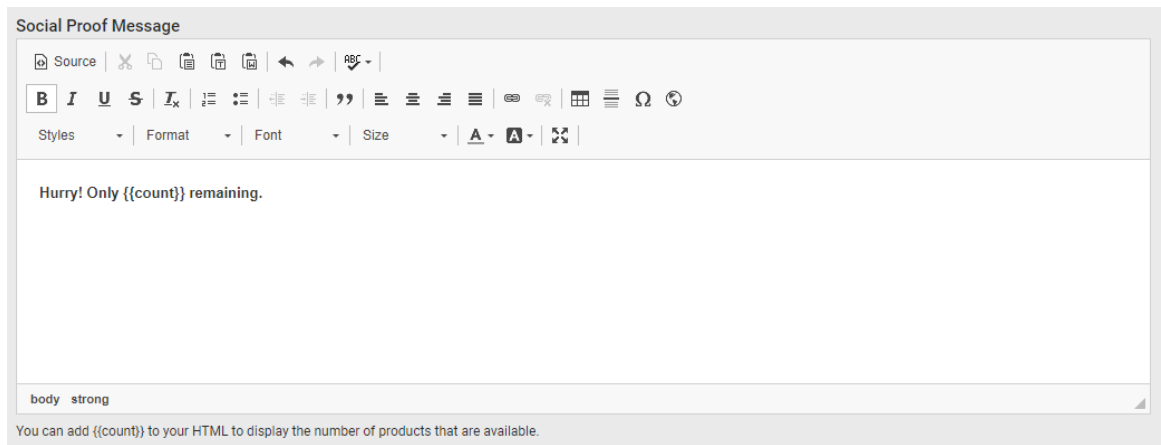
Optional Inputs

Component	<input type="text"/>
	<small>The region or component with which this action is associated (e.g. CSS selector, component name, component ID)</small>

9. Optionally, customize the default message that appears in **Social Proof Message**, or replace the default message with a different one.
- The default message for the Inventory type is "Hurry! Only {{count}} remaining."
 - You must include `{{count}}` to have it replaced with the inventory count that appears for the product ID in the `quantity` field of the product catalog that you selected in step 5.



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



10. If you want to specify additional criteria that must be met for the social proof action to fire, select an option from **ADD CONDITION**, and then type into the respective input field the necessary information to complete the [action condition](#).
11. Click **CREATE**.

In addition to configuring the Social Proof action, you must also configure the appropriate request to the Engine API. See [Configuring the Engine API Request](#) in this documentation for more information.

Messages Based on a Recommendation Strategy

This category of Social Proof actions allows you to deploy messages on products a customer is more likely to buy as calculated by a recommendation strategy.



If you plan for the Social Proof action to appear on product detail pages, then you cannot use a recommendation strategy configured with the Recently Viewed recommendation algorithm. Because this algorithm deduplicates the product ID of the page being viewed, the Social Proof message doesn't appear.

The **Trending** type typically works well when the recommendation strategy that you want to use for the Social Proof action includes a [noncollaborative recommendation algorithm](#), such as Most Viewed (Product Detail Page) or Top Selling by Purchase Count. If the recommendation strategy that you want to use includes a [collaborative recommendation algorithm](#), such as Purchased and Also Purchased or Viewed and Later Purchased, then consider using the **Recommended for you** type.

You can use these types of Social Proof actions on product detail pages and on pages that display multiple product IDs. Furthermore, you can select a [local or a global recommendation strategy](#) for the action.

Follow these steps to configure a Social Proof action that displays a message on products identified by a recommendation strategy.

1. Create a [new Omnichannel experience](#), and then configure the WHY and WHO settings.

2. Click **WHAT** and then click **ADD ACTION**.

BACK TO WEB EXPERIENCES VIEW ANALYTICS

Recommended for You Social Proof ACTIVATE PREVIEW DUPLICATE

DRAFT Created: Feb 20 2025, 1:45 PM

+ ADD TAGS

WHY Select your experience type and goal...

WHO For all visitors

WHAT **A** Add action...

WHEN from Feb 20 2025, 1:45 PM ongoing

WHAT ADD ACTION

3. Click **Social Proof** on the Action Type panel, and then click the action template.

WHAT ACTION TYPE SOCIAL PROOF RETURN TO ACTION TYPE

Social Proof Strategy

API

Omni Social Proof RETURN TO SELECT ACTION

4. Select an option from the RECOMMENDATION STRATEGY category in **Social Proof Type**.

WHAT ACTION TYPE SOCIAL PROOF RETURN TO SELECT ACTION

Omni Social Proof

Returns Social Proof data and id...
This action contains no built-in tags.

Required Inputs

Social Proof Type **VIEWED**

Lookback Period **DAYS (1-6)** 1
Period of historical data used for this strategy. Select from the last hour(s), day(s), week(s) or last 30 days.

5. Select from **Recommendation Strategy** an option that's configured in a way that best supports the message type that you selected in the previous step. You can use the search field to find and select a strategy by name, or scroll through the options to select one.



If you select a recommendation strategy that Monetate hasn't processed for any reason or hasn't finished processing it yet, then an error message appears below **Recommendation Strategy** alerting you. You cannot save the action until you select a recommendation strategy that's been processed.



You cannot use a [slotted recommendation](#) in an Omnichannel Social Proof action.

Omni Social Proof

Returns Social Proof data in Omnichannel. *This action contains no built-in targets.*

Required Inputs

Social Proof Type

Recommendation Strategy: CK_STRATEGY

6. Type into **Maximum Products Returned** the total number of recommended products on which the Social Proof message should appear.



The minimum is 1 product, and the maximum is 50 products.

Required Inputs

Social Proof Type: RECOMMENDED FOR YOU

Recommendation Strategy: CK_STRATEGY

Maximum Products Returned: 10

Set the maximum number of products you would like returned by the recommendation strategy.

7. If the action targets pages displaying multiple product IDs, such as category product list pages, search results pages, or the cart page, then 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-

request limit that you set in **Maximum Messages per Page**, then the Social Proof message appears on the products on the page that most closely meet the recommendation strategy criteria.

Required Inputs

Social Proof Type	RECOMMENDED FOR YOU ▾
Recommendation Strategy	CK_STRATEGY ▾
Maximum Products Returned	<input type="text" value="10"/> Set the maximum number of products you would like returned by the recommendation strategy.
Maximum Messages per Page	<input type="text" value="No limit"/> ← Set the maximum number of Social Proof messages you would like shown on a single page.

8. Optionally, input into **Component** the region or component with which the action is associated (for example, a relative element selector, component name, or component ID).

Optional Inputs

Component	<input type="text"/>
	<small>The region or component with which this action is associated (e.g. CSS selector, component name, component ID)</small>

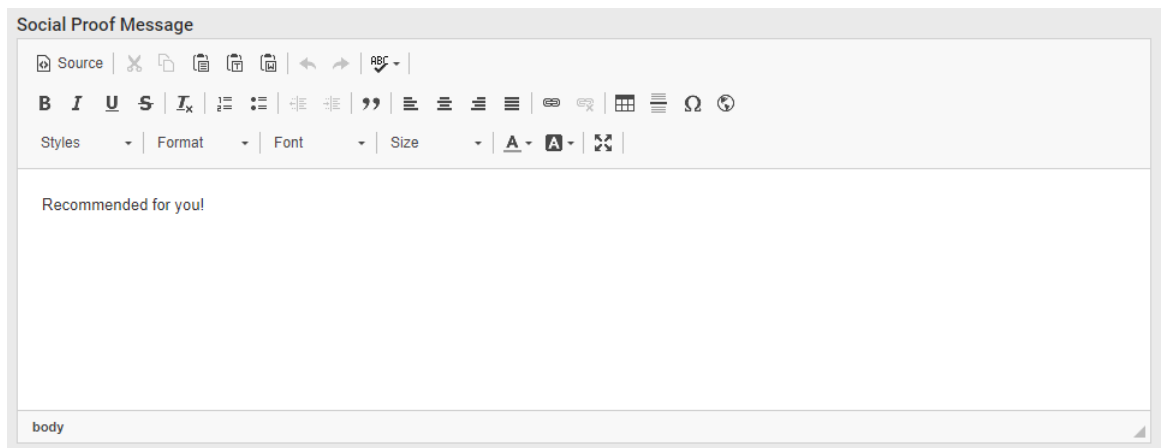
9. Optionally, customize the default message that appears in **Social Proof Message**, or replace the default message with a different one.
- If you selected **Trending** in step 4, then the default message that appears when the action fires is "Trending!"
 - If you selected **Recommended for you** in that step, then the default message is "Recommended for you!"



You cannot use the `{{count}}` placeholder in the message that you craft for a Social Proof action that is based on a recommendation strategy.



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



10. If you want to specify additional criteria that must be met for the action to fire, select one of the options from **ADD CONDITION**, and then type into the respective input field the necessary information to complete the [action condition](#).
11. Click **CREATE**.

In addition to configuring the Social Proof action, you must also configure the appropriate request to the Engine API. See [Configuring the Engine API Request](#) in this documentation for more information.

Configuring the Engine API Request

Clients that have implemented the Engine API have only one Omnichannel Social Proof action template, and it works on both product detail pages, which display a single product ID (PID), and on pages that display multiple PIDs, such as product category listings, search results, and cart pages. Therefore, you must specify in the Engine API request if the action's messages should appear on product detail pages or on pages that display multiple PIDs.



If you want Social Proof messages to appear or not to appear on a specific page type, then use one of the **Page type** action condition options when configuring the action in the Monetate platform. See [Action Condition Mapping](#) in [Target/Event/Condition Mapping](#) for more information.

Request for Messages on Product Detail Pages

Here is an example of an Engine API request targeting product detail pages.

```
{
  "channel": "a-3e41bf76/p/monetate.mybigcommerce.com",
  "monetateId": "5.1982474515.1616616018101",
  "events": [
    {
      "eventType": "monetate:decision:DecisionRequest",
      "requestId": "sample-unique-request-id-ABC-123",
      "includeReporting": false
    },
    {
      "eventType": "monetate:context:ProductDetailView",
      "products": [
        {
          "sku": "111",
          "productId": "111"
        },
        {
          "productId": "product57"
        }
      ]
    }
  ]
}
```

The "eventType": "monetate:context:ProductDetailView" event specifies that the action targets product detail pages.

The response to this request appears much like the following sample.

```

{
  "meta": {
    "code": 200
  },
  "data": {
    "responses": [
      {
        "requestId": "sample-unique-request-id-ABC-123",
        "actions": [
          {
            "actionId": 4185123,
            "actionType": "monetate:action:SocialProofDataV2",
            "socialProofData": {
              "proofType": "view",
              "lookbackMinutes": 180,
              "products": [
                {
                  "productId": "pid1",
                  "count": 10
                },
                {
                  "productId": "pid2",
                  "count": 20
                }
              ]
            }
          ]
        },
        "component": "Foo",
        "message": {
          "type": "html",
          "href": "https://{monetate_cdn}/img/1/1094/4339665.htm",
          "data": "<p>My message</p>\n"
        }
      }
    ]
  }
}

```

Request for Messages on Pages Displaying Multiple Product IDs

Here is an example of an Engine API request targeting product category listings, search results pages, cart pages, or other page types that contain multiple product IDs.

```
{
  "channel": "a-3e41bf76/p/monetate.mybigcommerce.com",
  "monetateId": "5.1982474515.1616616018101",
  "events": [
    {
      "eventType": "monetate:decision:DecisionRequest",
      "requestId": "sample-unique-request-id-ABC-123",
      "includeReporting": false
    },
    {
      "eventType": "monetate:context:ProductThumbnailView",
      "products": [
        "product21",
        "product22",
        "product23"
      ]
    }
  ]
}
```

The `"eventType": "monetate:context:ProductThumbnailView"` event specifies that the action targets pages displaying multiple product IDs.

The response to this request appears much like the following sample.


```
{
  "meta": {
    "code": 200
  },
  "data": {
    "responses": [
      {
        "requestId": "sample-unique-request-id-ABC-123",
        "actions": [
          {
            "actionType": "monetate:action:SocialProofDataV2",
            "actionId": 4185123,
            "products": [
              {
                "count": 0,
                "lookbackMinutes": 60,
                "proofType": "view",
                "productId": "product22"
              },
              {
                "count": 0,
                "lookbackMinutes": 60,
                "proofType": "view",
                "productId": "product23"
              },
              {
                "count": 0,
                "lookbackMinutes": 60,
                "proofType": "view",
                "productId": "product21"
              }
            ],
            "component": "Foo",
            "message": {
              "href": "https://{monetate_cdn}/img/1/1094/4339665.htm",
              "data": "<p>My message</p>\n"
            }
          }
        ]
      }
    ]
  }
}
```