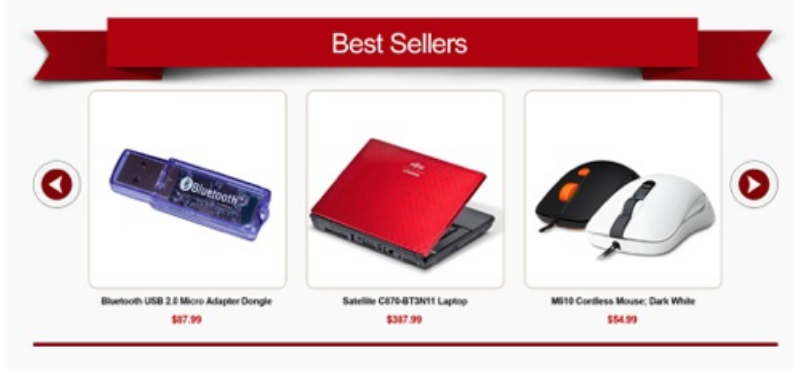


# Merchandiser Sets

**!** This information refers to a deprecated recommendations feature. See the [Recommendations](#) category for documentation about the current Product Recommendations feature.

Endcaps let you make dynamic product recommendations on your site. Merchandiser sets allow you to group items into a set directly from your product feed. Monetate uses your product feed to populate merchandiser sets for use in endcaps.



Merchandiser sets are created from a product feed and are updated dynamically. Therefore, you never have to manually update any endcap you create because they always reflect your most up-to-date product feed.

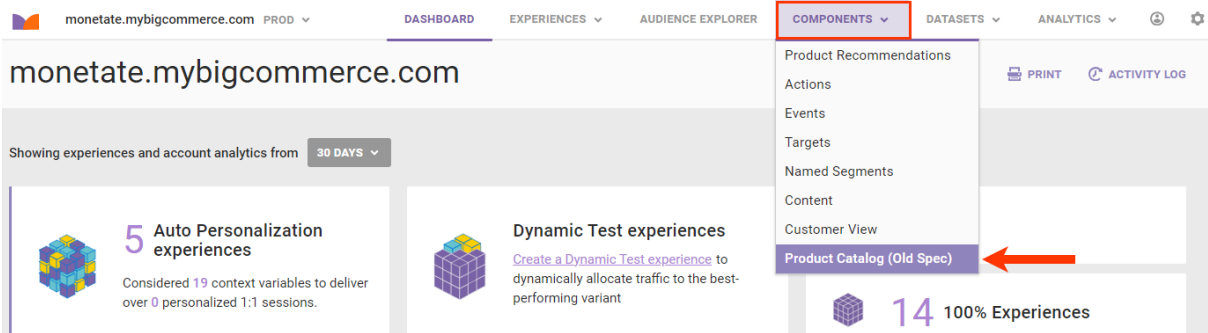
**i** A merchandiser set may require up to a day to reflect any changes or updates that you make.

Merchandiser sets can populate endcaps with product recommendations specifically tailored to a customer's shopping and viewing history.

## Creating a Merchandiser Set

Follow these steps to create a merchandiser set.

1. Click **COMPONENTS** in the top navigation bar, and then select **Product Catalog (Old Spec)**.



2. Click the **Merchandiser Sets** tab.

Product Catalog

Catalog Last Updated: a day ago | Visual Search Last Updated: a day ago

Search | Update History | Categories | **Merchandiser Sets** | Synonym Mapping

1,107 PRODUCTS | 151 CATEGORIES | 273 BRANDS

3. Click **CREATE SET**.

< BACK TO PRODUCT CATALOG

## Merchandiser Sets

**CREATE SET**

LAST PRODUCT CATALOG LOAD	PRODUCT COUNT
9/5/23 4:06 AM	0

### Merchandiser Sets

Best Sellers – Glassware

4. Name the merchandiser set. Click the placeholder title, type the name into the text field, and then click the green checkmark.
5. Select an algorithm from **Set type** that determines the type of products from your feed included in the set. See [Set Type Options](#) for more information.

**i** Except for the New Products and Selective merchandiser set algorithms, most merchandiser set algorithms require at least 30 days of data collected from your site before you can use them.

< BACK TO MERCHANDISER SETS

## Kitchen Textiles

**CREATE** **CANCEL**

**Set type**: TOP SELLING BY PURCHASE COUNT

**Geo Targeting**: DON'T APPLY GEO TARGETING

**Max Number of Products**: 0

**Lookback days**: 30 DAYS

**Randomize Product Order**: NO

**If there are not enough products in this set**: DO NOT DISPLAY ACTION

**If there are no products in this set**: DO NOT DISPLAY ACTION

**Fallback Set**: NO FALLBACK

6. Type into **Max Number of Products** the total number of products you want to appear in an endcap created from the merchandiser set.

**i** The default number is zero. The maximum is 99.

[← BACK TO MERCHANDISER SETS](#)


## Kitchen Textiles

[CREATE](#) [CANCEL](#)

Set type: TOP SELLING BY PURCHASE COUNT

Geo Targeting: DONT APPLY GEO TARGETING

If there are not enough products in this set, DO NOT DISPLAY ACTION

Max Number of Products:  

Lookback days: 30 DAYS

If there are no products in this set, DO NOT DISPLAY ACTION

Randomize Product Order:  NO

Fallback Set: NO FALLBACK

7. Select an option from **Geo Targeting**.

- **Don't apply geo targeting** – No location-based target is created for the merchandiser set; the default setting
- **Country** – Adds a country-specific target to the merchandiser set
- **Region** – Adds a US state target to the merchandiser set

[← BACK TO MERCHANDISER SETS](#)

## Kitchen Textiles

[CREATE](#) [CANCEL](#)

Set type: TOP SELLING BY PURCHASE COUNT

Geo Targeting: DONT APPLY GEO TARGETING

If there are not enough products in this set, DO NOT DISPLAY ACTION

Max Number of Products:

Lookback days: 30 DAYS

If there are no products in this set, DO NOT DISPLAY ACTION

Randomize Product Order:  NO

Fallback Set: NO FALLBACK

8. Select an option from **Lookback days** to determine how much historical data is considered for populating the merchandiser set.

[← BACK TO MERCHANDISER SETS](#)

## Kitchen Textiles

[CREATE](#) [CANCEL](#)

Set type: TOP SELLING BY PURCHASE COUNT

Geo Targeting: DONT APPLY GEO TARGETING

If there are not enough products in this set, DO NOT DISPLAY ACTION

Max Number of Products:

Lookback days: 30 DAYS

If there are no products in this set, DO NOT DISPLAY ACTION

Randomize Product Order:  NO

Fallback Set: NO FALLBACK

9. If you selected **Purchased and also purchased**, **Viewed and also viewed**, or **Viewed and later purchased** in step 5, then adjust as necessary these settings:

- **Include endcap items related to** – Select **ANY** if you want Monetate to compare endcap items against any single product ID on the page, or select **ALL** if you want Monetate to compare endcap items against all the product IDs on the page

- **Enable Advanced Category Filtering** – Select **YES** to include endcap items that match the categories on a product detail page to provide site visitors with contextually relevant results; see [Using Advanced Category Filtering](#) in this documentation for more information

BACK TO MERCHANDISER SETS

## Kitchen Textiles

CREATE CANCEL

Set type: PURCHASED AND ALSO PURCHASED

Lookback days: 30 DAYS

Max Number of Products: 50

Include endcap items related to: ANY

Randomize Product Order: NO

Enable Advanced Category Filtering: NO

If there are not enough products in this set, DO NOT DISPLAY ACTION

If there are no products in this set, DO NOT DISPLAY ACTION

Fallback Set: NO FALLBACK

10. Optionally, toggle **Randomize Product Order** to **YES** to allow items displayed in an endcap to appear in a random order instead of the order that the algorithm intended.



Randomization of items in a set only occurs once a day at the time the product feed is collected by Monetate. An endcap populated by the set doesn't change each time a customer views it on a different page. If you leave this setting on its default **NO** setting, then some products that appear later in a set might not ever display for a customer.

BACK TO MERCHANDISER SETS

## Kitchen Textiles

CREATE CANCEL

Set type: TOP SELLING BY PURCHASE COUNT

Geo Targeting: DON'T APPLY GEO TARGETING

Max Number of Products: 0

Lookback days: 30 DAYS

Randomize Product Order: NO

If there are not enough products in this set, DO NOT DISPLAY ACTION

If there are no products in this set, DO NOT DISPLAY ACTION

Fallback Set: NO FALLBACK

11. Select an option from **If there are not enough products in this set** to determine if an endcap populated by the merchandiser set appears if the set doesn't have enough applicable product IDs.
  - **Display action** – The endcap appears and is populated with however many applicable products from the merchandiser set
  - **Do not display action** – The endcap doesn't appear
  - **Use a fallback set** – The endcap appears, and Monetate supplements the applicable products from the merchandiser set with applicable products from another merchandiser set



If you select **Use a fallback set**, you must then select a back-up merchandiser set in step 13.

[← BACK TO MERCHANDISER SETS](#)

## Kitchen Textiles

[CREATE](#) [CANCEL](#)

Set type  
TOP SELLING BY PURCHASE COUNT

Geo Targeting  
DONT APPLY GEO TARGETING

Max Number of Products  
0

Lookback days  
30 DAYS

Randomize Product Order  
NO

If there are not enough products in this set,  
DO NOT DISPLAY ACTION

If there are no products in this set,  
DO NOT DISPLAY ACTION

Fallback Set  
NO FALLBACK

12. Select an option from **If there are no products in this set** to determine if an endcap populated by the merchandiser set appears if the set has no applicable product IDs.
- **Display action** – The endcap appears and is populated with however many applicable products from the merchandiser set
  - **Do not display action** – The endcap doesn't appear
  - **Use a fallback set** – The endcap appears, and Monetate supplements the applicable products from the merchandiser set with applicable products from another merchandiser set



If you select **Use a fallback set**, then you must then select a back-up merchandiser set in step 13.

[← BACK TO MERCHANDISER SETS](#)

## Kitchen Textiles

[CREATE](#) [CANCEL](#)

Set type  
TOP SELLING BY PURCHASE COUNT

Geo Targeting  
DONT APPLY GEO TARGETING

Max Number of Products  
0

Lookback days  
30 DAYS

Randomize Product Order  
NO

If there are not enough products in this set,  
DO NOT DISPLAY ACTION

If there are no products in this set,  
DO NOT DISPLAY ACTION

Fallback Set  
NO FALLBACK

13. Select a previously created merchandiser set from **Fallback Set** from which Monetate can supplement the products included in an endcap intended to be populated by the set you are creating, or select **No fallback** if you don't want a supplemental merchandiser set.

< BACK TO MERCHANDISER SETS

## Kitchen Textiles

**CREATE** **CANCEL**

Set type: TOP SELLING BY PURCHASE COUNT

Geo Targeting: DON'T APPLY GEO TARGETING

Max Number of Products: 0

Lookback days: 30 DAYS


Randomize Product Order:  NO

If there are not enough products in this set, DO NOT DISPLAY ACTION

If there are no products in this set, DO NOT DISPLAY ACTION

Fallback Set: NO FALLBACK

14. Input into their respective predictive text fields in the **Include in this set** section any product categories and product IDs from your product feed that you want to supplement those products defined by the merchandiser set's selected algorithm. If necessary, switch from **OR** to **AND** the toggle at the top of the table of product categories you added to ensure all the categories you input are included.

 If you selected **Purchased and also purchased**, **Viewed and also viewed**, or **Viewed and later purchased** from **Set type**, then you can only can add product categories in this section.

< BACK TO MERCHANDISER SETS

## Kitchen Textiles

**CREATE** **CANCEL**

Set type: TOP SELLING BY PURCHASE COUNT

Lookback days: 30 DAYS

Max Number of Products: 50

Include endcap items related to: ANY  products on the page.

Randomize Product Order:  NO

Enable Advanced Category Filtering:  NO

If there are not enough products in this set, USE A FALLBACK SET

If there are no products in this set, USE A FALLBACK SET

Fallback Set: BEST SELLERS-KITCHEN

**Include in this set:**

Categories

CATEGORY	# OF PIDS	AND	OR
Products Under \$100	68	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Accessories	6	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sets	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Products

**Exclude from this set:**

Categories

Products

**Merchandiser Set Product Pool**

The following list represents a sample of up to 99 products that this merchandiser set can pull from.

NAME	PID
Fall plaid oven mitt	71321
Fall plaid potholder	71322
Fall plaid apron	71323
Fall plaid tea towel	71324
Fall plaid dish towel	71325
Fall pumpkins oven mitt	71326
Fall pumpkins potholder	71327
Fall pumpkins apron	71328
Fall pumpkins tea towel	75202

15. Input into their respective predictive text fields in the **Exclude from this set** section those product categories and product IDs from your product feed that you want excluded from the merchandiser set. If

necessary, switch from **OR** to **AND** the toggle at the top of the table of product categories you added to ensure all the categories you input are excluded.

← BACK TO MERCHANDISER SETS

## Kitchen Textiles

**CREATE** **CANCEL**

---

Set type: **TOP SELLING BY PURCHASE COUNT** (dropdown)

Lookback days: **30 DAYS** (dropdown)

If there are not enough products in this set, **USE A FALLBACK SET** (dropdown)

Max Number of Products:

Include endcap items related to **ANY** (dropdown) products on the page.

Randomize Product Order: **NO** (toggle)

Enable Advanced Category Filtering: **NO** (toggle)

If there are no products in this set, **USE A FALLBACK SET** (dropdown)

Fallback Set: **BEST SELLERS-KITCHEN** (dropdown)

---

**Include in this set:**

**Categories**

CATEGORY	# OF PIDS	AND	OR
Products Under \$100	68	<input type="checkbox"/>	<input type="checkbox"/>
Accessories	6	<input type="checkbox"/>	<input type="checkbox"/>
Sets	3	<input type="checkbox"/>	<input type="checkbox"/>

**Products**

**Exclude from this set:**

**Categories**

**Products**

**Merchandiser Set Product Pool**

The following list represents a sample of up to 99 products that this merchandiser set can pull from.

NAME	PID
Fall plaid oven mitt	71321
Fall plaid potholder	71322
Fall plaid apron	71323
Fall plaid tea towel	71324
Fall plaid dish towel	71325
Fall pumpkins oven mitt	71326
Fall pumpkins potholder	71327
Fall pumpkins apron	71328
Fall pumpkins tea towel	75202

16. Click **CREATE**.

← BACK TO MERCHANDISER SETS

## Kitchen Textiles

**CREATE** **CANCEL**

---

Set type: **TOP SELLING BY PURCHASE COUNT** (dropdown)

Lookback days: **30 DAYS** (dropdown)

If there are not enough products in this set, **USE A FALLBACK SET** (dropdown)

After you create a new merchandiser set or edit an existing one, the update runs overnight. The size of your product feed may directly affect the time it takes to update merchandiser sets with changes made to the feed in Monetate. The merchandiser sets are available in the morning after this process completes.

## Set Type Options

Use the contents of this table to better understand the **Set type** merchandiser set algorithm options.

Set Type	Description
----------	-------------

Set Type	Description
<b>Top selling by purchase count</b>	Populates based on the top-selling products by purchase count across your entire site; updated nightly
<b>Newest Products</b>	Populates based on the products most recently added to your product catalog, either overall or within a specific category as defined in your product feed; updated nightly
<b>Recently viewed products</b>	Populates with those products viewed by a visitor during their current session and during their sessions from the previous 30 days, removing any duplicates and always excluding the product that the visitor is presently viewing on a product detail page; updated in real time
<b>Purchased and also purchased</b>	Populates based on collaborative filtering for a given product and filtering for the products most frequently purchased along with the target product, which can be a product on a product detail page or the first item in the shopping cart; updated nightly
<b>Selective</b>	Populates with products based on the attributes you provide; updated nightly
<b>Top selling by gross revenue</b>	Populates with the top-selling products by gross revenue across your site; updated nightly
<b>Most viewed (product detail page)</b>	Populates with the most-viewed products across your site; updated nightly
<b>Viewed and also viewed</b>	Populates based on collaborative filtering for a given product and filtering for the products most frequently viewed by site visitors who also viewed the target product, which can be a product on a product detail page or the first product in the shopping cart; updated nightly
<b>Viewed and later purchased</b>	Populates based on collaborative filtering for a given product or SKU and filtering for the products most frequently purchased by site visitors who viewed the target product; updated nightly

## Using Advanced Category Filtering

If you select **Purchased and also purchased**, **Viewed and also viewed**, or **Viewed and later purchased** from **Set type**, then the **Enable Advanced Category Filtering** setting appears. When you enable this setting, Monetate compares the product ID of the product on the page on which it loads the endcap to the product categories that you've added to the merchandiser set in the **Include in this set** section. The result is that the endcap only displays products from the categories to which the product on the page belongs. This filtering provides customers with contextually relevant results.

For example, a merchandiser set is configured with the Viewed and also viewed algorithm and has three categories listed in the **Include in this set** section: shoes, purses, and jewelry. If **Enable Advanced Category Filtering** is set to **NO**, then the results are as follows:

- The algorithm calculates the 99 results using the **Include in this set** criteria.



- An endcap on a product detail page for a purse displays a combination of shoes, purses, and jewelry.

If **Enable Advanced Category Filtering** is set to **YES**, then the results are as follows:

- The initial results are filtered to remove any product that isn't in the same category as the product on the product detail page on which the endcap appears.
- The endcap on a product detail page for a purse displays only purses instead of a mixture of products from the shoes, purses, and jewelry categories.

Consider these use cases to better understand how you can use Advanced Category Filtering to help your business.

## **Reduce the number of merchandiser sets and action conditions**

You have three different merchandiser sets that use the Viewed and also viewed algorithm and the Women's product category. Each set only has one of the following categories: Women's Accessories, Women's Shoes, and Women's Sale. You can combine the three sets into a single one for products in the Women's category and use it across all women's product detail pages, reducing the number of experiences and actions that you need to accomplish the same results.

## **Promote occasions or styles**

You have several categories in your product feed for seasons and styles, including Formal, Outdoors, Lightweight, Sportswear, and Casual. You can create a merchandiser set that uses the Viewed and also viewed algorithm that includes all subcategories. When a visitor views a pair of jogging pants included in the Outdoors, Lightweight, and Sportswear subcategories, the endcap includes recommendations from Outdoors, Lightweight, and Sportswear and excludes products from the Formal and Casual subcategories. When another visitor views a cotton blazer in the Formal and Lightweight category, the same endcap only recommends products from the Formal and Lightweight categories.

## **Merchandiser Set Product Pool**

The Merchandiser Set Product Pool table contains all the possible products in the product feed from which the merchandiser set you're can pull. As you configure various settings for the merchandiser set that filter these products, the table's contents change accordingly.

## **Using a Merchandiser Set in an Experience**

Follow these steps to use a merchandiser set for an endcap in a Web experience.

1. Create a new Web experience, and then configure the **WHY** and the **WHO** settings.
2. Click **WHAT** and then click **ADD ACTION**.

[← BACK TO EXPERIENCES](#)
[VIEW ANALYTICS](#)

# Autumn Endcap

▶ ACTIVATE
▶ PREVIEW
▶ DUPLICATE
▶ ...

○ DRAFT | Created: Sep 15 2023, 9:11 AM

+ ADD TAGS

---

**WHY** to increase lift for all traffic

**WHO** For all visitors

**WHAT** A Add action...

⊕

**WHEN** from Sep 15 2023, 9:11 AM ongoing


---


**WHAT** ▶ ADD ACTION


3. Click **Product Recommendations** on the Action Type panel.


[WHAT](#)
[ACTION TYPE](#)
[← RETURN TO WHAT](#)


## Action Type


 Images


 HTML


 CSS


 JavaScript


 Lightboxes

 Hide/Show Content

 Product Recommendations

 Badges

 Create New Action

 Other

4. Select an endcap action template.

[WHAT](#)
[ACTION TYPE](#)
[PRODUCT RECOMMENDATIONS](#)
[← RETURN TO ACTION TYPE](#)

## Product Recommendations

<p><b>Any page</b></p> <ul style="list-style-type: none"> <li><a href="#">Horizontal Image Slider for PDP</a></li> <li><a href="#">Horizontal Intelligent Recommendation for PDP</a></li> </ul>	<p><b>Product detail page</b></p> <ul style="list-style-type: none"> <li><a href="#">Horizontal Endcap on PDP - Mobile v2</a></li> </ul>	<p><b>other</b></p> <ul style="list-style-type: none"> <li><a href="#">Endcap with Intelligent Recommendations (PDP)</a></li> <li><a href="#">Endcap with Intelligent Recommendations (PDP) - slotted</a></li> <li><a href="#">Custom Responsive Endcap</a></li> </ul>
---	--	--


5. Configure the endcap action template. Every merchandiser set in the account is available in **Merch Set**.



WHAT ACTION TYPE PRODUCT RECOMMENDATIONS HORIZONTAL ENDCAP ON PDP [RETURN TO SELECT ACTION](#)

### Horizontal Endcap on PDP

Inserts a responsive horizontal endcap to replace the also bought endcap on product detail pages  
*This action is targeted on pages where page type is product.*


#### Required Inputs


Slider Orientation **HORIZONTAL**   
Horizontal or vertical slider orientation.

Merch Set **SELECT A MERCH SET**    
Group of products to put in the endcap.

Item Elements Elements to display for each product.


<input checked="" type="checkbox"/> Image	<input checked="" type="checkbox"/> Price	<input type="checkbox"/> AlternatePrice
<input checked="" type="checkbox"/> Name	<input type="checkbox"/> Description	<input type="checkbox"/> BrandName

Slide Increment **FULL-PAGE**   
Number of items to slide on scroll button click.


End of Slider Behavior **STOP AT THE END**   
Type of behavior to use when an arrow button is clicked at the end of the slider.

Number of Endcap Items   
Number of endcap items.

6. Click **CREATE** after you configure the endcap action.

Exclude PIDs From Page **NO**   
Only activate to exclude the PIDs on the page that were collected from the track that the endcap was created on

Apply this action when the following conditions are met:

[ADD CONDITION](#) 

**CREATE** [CANCEL](#)

See [Endcap Guide](#) and [Plan an Endcap](#) for more information.