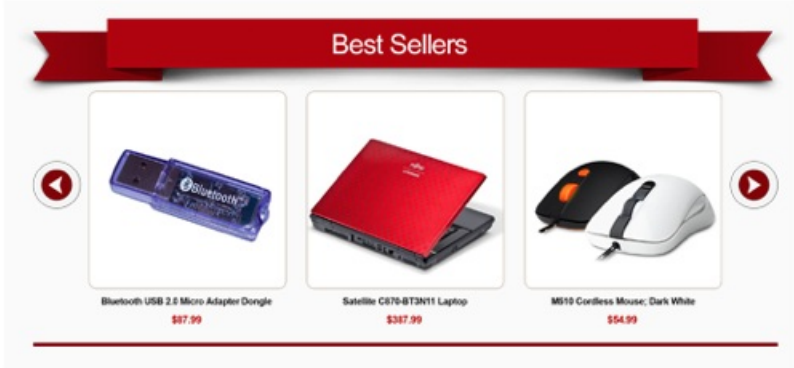


Merchandiser Sets

! To use merchandiser sets and endcaps, you must first upload a product feed to Monetate. See [Upload a Product Feed](#) for more information.

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.

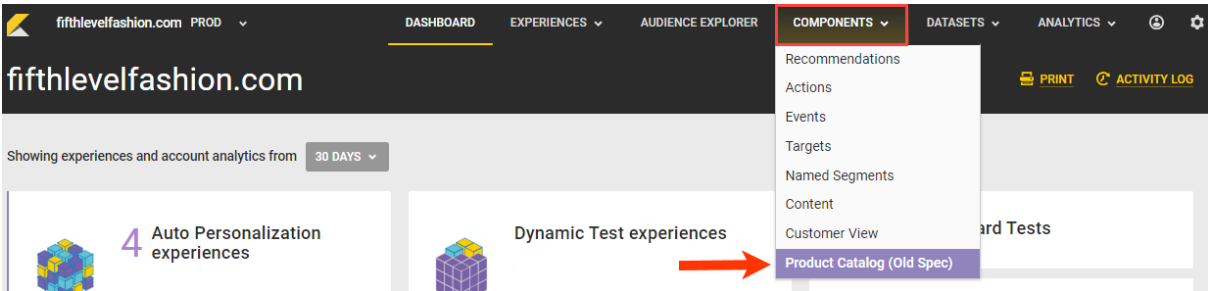
i A merchandiser set may require up to a day to reflect any changes or updates that you make.

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

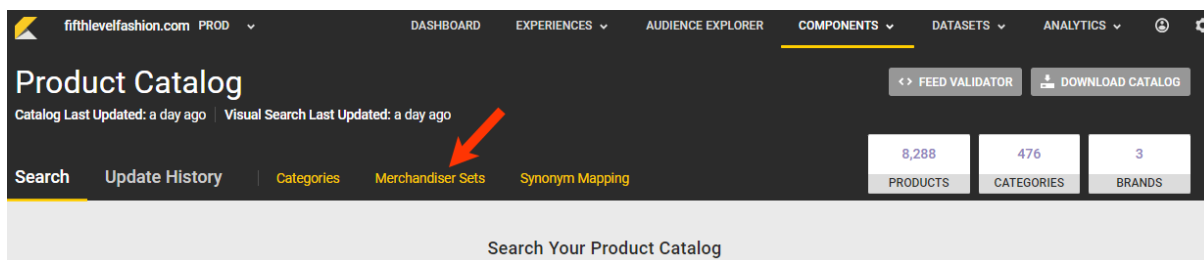
Creating a Merchandiser Set

Follow these steps to create a merchandiser set.

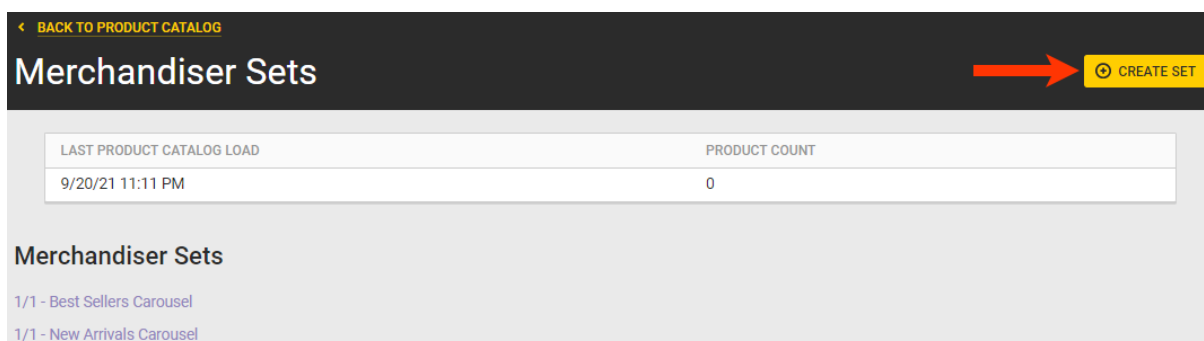
1. Click **COMPONENTS** in the top navigation bar, and then click **Product Catalog (Old Spec)**.



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



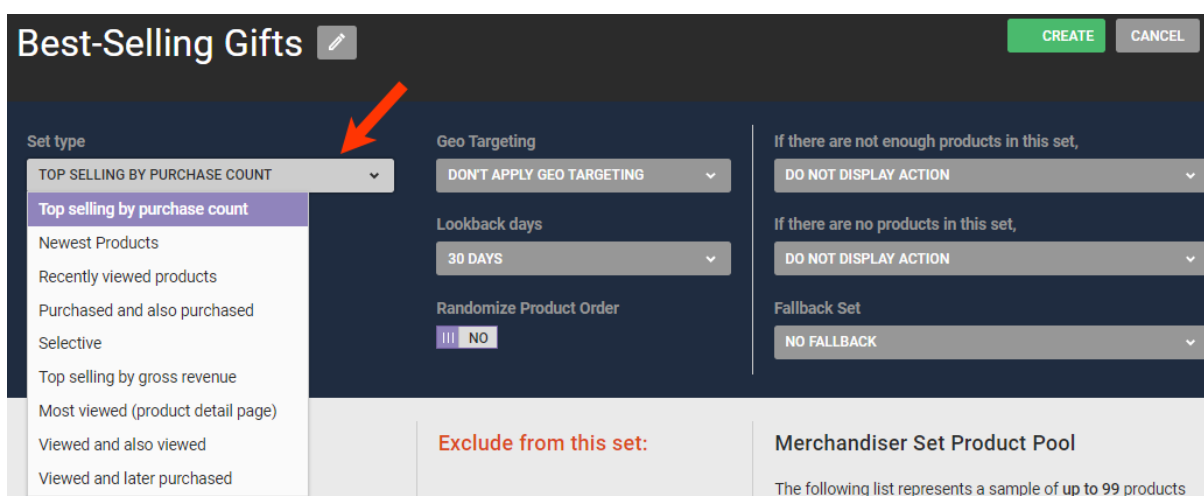
3. Click **CREATE SET**.



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](#) in this documentation 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.



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



The default number is zero. The highest number you can set for **Max Number of Products** is 99.

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

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

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

Set type: VIEWED AND LATER PURCHASED

Lookback days: 30 DAYS

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

Max Number of Products: 25

Include endcap items related to: ANY

Randomize Product Order: NO

Enable Advanced Category Filtering: NO

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.

i 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.

Best-Selling Gifts

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

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

Max Number of Products: 25

Lookback days: 30 DAYS

Randomize Product Order: NO

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.

Best-Selling Gifts ✎ CREATE CANCEL

Set type: TOP SELLING BY PURCHASE COUNT

Geo Targeting: DONT APPLY GEO TARGETING

Lookback days: 30 DAYS

Max Number of Products: 25

Randomize Product Order: NO

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

Display action

Do not display action

Use a fallback set

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.

Best-Selling Gifts ✎ CREATE CANCEL

Set type: TOP SELLING BY PURCHASE COUNT

Geo Targeting: DONT APPLY GEO TARGETING

Lookback days: 30 DAYS

Max Number of Products: 25

Randomize Product Order: NO

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

If there are no products in this set, **DISPLAY ACTION**

Display action

Do not display action

Use a fallback set

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.

Best-Selling Gifts

CREATE **CANCEL**

Set type: TOP SELLING BY PURCHASE COUNT

Geo Targeting: DONT APPLY GEO TARGETING

Max Number of Products: 25

Lookback days: 30 DAYS

Randomize Product Order: 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: 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 add product categories in this section.

Best-Selling Gifts

CREATE **CANCEL**

Set type: TOP SELLING BY PURCHASE COUNT

Geo Targeting: DONT APPLY GEO TARGETING

Max Number of Products: 25

Lookback days: 30 DAYS

Randomize Product Order: 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 SELLING GIFTS CAROUSEL

Include in this set:

Categories

Search by category

CATEGORY	# OF PIDS	AND	OR
Gold Earrings	370	<input checked="" type="radio"/>	<input type="radio"/>
Gold Bracelets	163	<input type="radio"/>	<input type="radio"/>
Gold Necklaces	284	<input type="radio"/>	<input type="radio"/>

Products

Search by PID or product name

Exclude from this set:

Categories

Search by category

Products

Search by PID or product name

Merchandiser Set Product Pool

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

NAME	PID
AA Long Pendant Necklace in...	aa-necklace-gld
Melrose Rose Gold Cocktail R...	mhrs-rsg-opal
Double Ring in Rose Gold	dbl-rsg
RR Rose Gold Cocktail Ring in...	rr-rsg-stone
Gold Earrings Bronze Magnes...	gld-ear-mag

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.

Best-Selling Gifts ✎ CREATE CANCEL

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

Geo Targeting: **DONT APPLY GEO TARGETING**

Lookback days: **30 DAYS**

Max Number of Products: **25**

Randomize Product Order: **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 SELLING GIFTS CAROUSEL**

Include in this set:

Categories

Search by category

CATEGORY	# OF PIDS	AND	OR
Gold Earrings	370		<input type="button" value="OR"/>
Gold Bracelets	163		<input type="button" value="OR"/>
Gold Necklaces	284		

Products

Search by PID or product name

Exclude from this set:

Categories

Search by category

CATEGORY	# OF PIDS	AND	OR
Silver Earrings	270		<input type="button" value="OR"/>
Silver Necklaces	191		<input type="button" value="OR"/>
Silver Bracelets	118		

Products

Search by PID or product name

Merchandiser Set Product Pool

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

NAME	PID
AA Long Pendant Necklace in...	aa-necklace-gld
Melrose Rose Gold Cocktail R...	mhrs-rsg-opal
Double Ring in Rose Gold	dbl-rsg
RR Rose Gold Cocktail Ring in...	rr-rsg-stone
Gold Earrings Bronze Magnes...	gld-ear-mag

16. Click **SAVE**.

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
Top selling by purchase count	Populates based on the top-selling products by purchase count across your entire site; updated nightly
Newest Products	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
Recently viewed products	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

Set Type	Description
Purchased and also purchased	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
Selective	Populates with products based on the attributes you provide; updated nightly
Top selling by gross revenue	Populates with the top-selling products by gross revenue across your site; updated nightly
Most viewed (product detail page)	Populates with the most-viewed products across your site; updated nightly
Viewed and also viewed	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
Viewed and later purchased	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. Click **WHAT** and then click **ADD ACTION**.

< [BACK TO WEB EXPERIENCES](#) VIEW ANALYTICS

October Endcap

ACTIVATE PREVIEW DUPLICATE ...

DRAFT | Created: Sep 28 2021, 2:37 PM


+ ADD TAGS

WHY

WHO

WHAT **A**













WHEN

WHAT  **ADD ACTION** v

2. Click **Recommendation** on the Action Type panel.

WHAT ACTION TYPE RETURN TO WHAT

Action Type

 Images	 HTML	 Hide/Show Content	 CSS
 Lightboxes	 Recommendation	 Other	 JavaScript
 Create New Action	 Site Recommendation	 Social Proof Strategy	 Product Finder

3. Select an endcap action template.

WHAT ACTION TYPE RECOMMENDATIONS RETURN TO ACTION TYPE

Recommendations

Any page	Index page	Product detail page
Intelligent Recommendation-PDP	Horizontal Endcap on PLP (Single)	Horizontal Endcap on PDP
Responsive Endcap (w/Add To Cart)		
other		
Intelligent Recommendation Slider		
Intelligent Recommendation Slider with Banner Image		
Intelligent Recommendation Slider with Optional Banner HTML		
Legacy Recommendation Slider with Optional Banner HTML		
Legacy Recommendation Slider with Optional Banner HTML - Mobile		
Legacy Recommendation Slider with Optional Banner Image - Mobile		

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

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	<input type="text" value="HORIZONTAL"/>	Horizontal or vertical slider orientation.	
Merch Set	<input type="text" value="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	<input type="text" value="FULL-PAGE"/>	Number of items to slide on scroll button click.	
End of Slider Behavior	<input type="text" value="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	<input type="text" value="40"/>	Number of endcap items.	

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

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