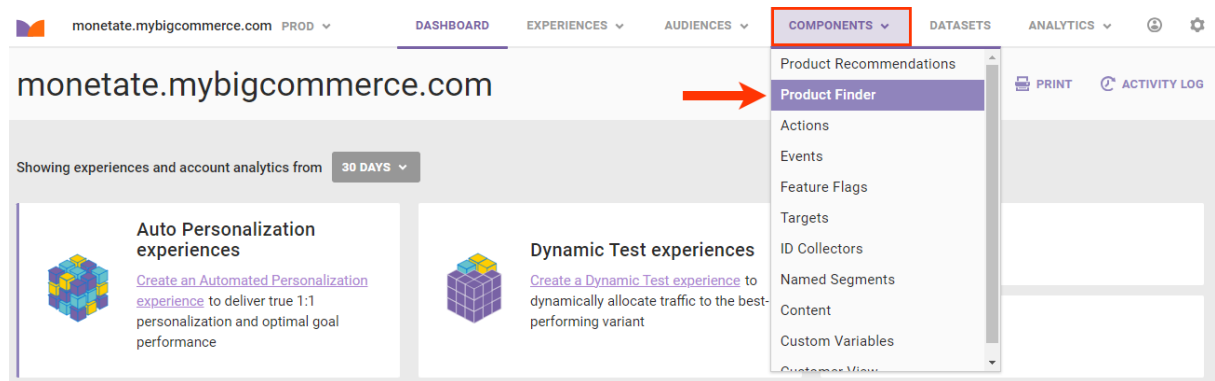


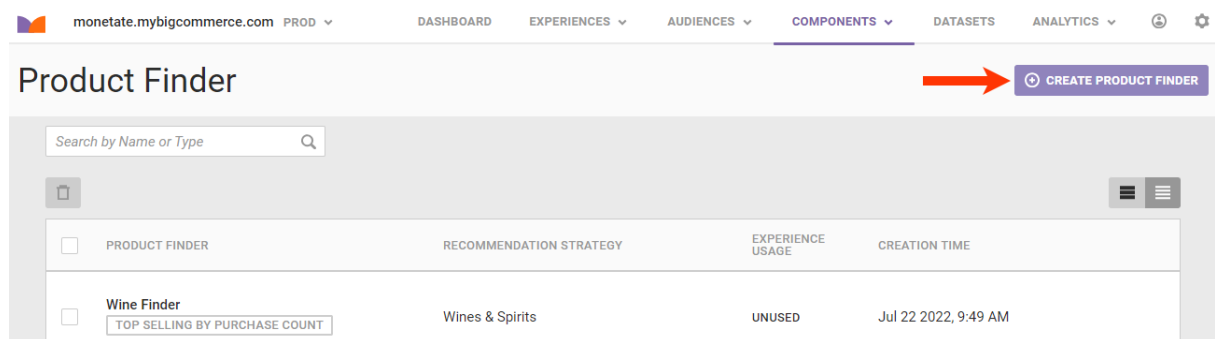
# Create a Product Finder Questionnaire

Follow these steps to create a Product Finder questionnaire.

1. Click **COMPONENTS** in the top navigation bar and then click **Product Finder**.



2. Click **CREATE PRODUCT FINDER**.



3. Configure the questionnaire.
  - a. Name the questionnaire.
  - b. Select a recommendation strategy.



You cannot use a [slotted recommendation](#) in a Product Finder questionnaire.

- c. Select if you want recommended products displayed after each answer the visitor provides or only after answering all the questions.
- d. Optionally, input any [product catalog custom fields](#) whose values you want displayed along with the basic product information for each recommended product. If you input multiple fields, ensure they're in a comma-separated list.
- e. Click **NEXT: BEGIN QUESTIONNAIRE**.

## Create Product Finder

### Name your Product Finder

Holiday Gift Finder

Add a unique name containing between 4 and 64 characters.

Name may not include special characters ( ` # ^ + = [ ] { } \ | < > / ? ~ ).

### Select Recommendation Strategy

Your guided questionnaire will deliver filtered results based on the selected recommendation strategy.

CK\_STRATEGY ▾

### When do you want results returned?

Results can be displayed at every step or when the user concludes the questionnaire.

- Return results after each question       Return results when the user concludes the questionnaire

### List any custom catalog fields you'd like returned to the client.

Provide a comma-separated list of any custom field you'd like returned. These can be any field in your catalog.

LowStockLevel,FreeShipping

CANCEL

NEXT: BEGIN QUESTIONNAIRE

4. Create the first question.
  - a. Type the question text into **Add Question**. A question must have at least four characters and no more than 64 characters. It cannot have any special characters except a question mark and parentheses.
  - b. Optionally, type into **Add Instructional Content** any information the customer might need to understand the question and the answer options.
  - c. Select the setting to make the answer multiple choice or single choice.
  - d. Type the first answer option into the **Add Answer** field, and then click **ADD ANSWER** each time you need to add another answer option. An answer cannot exceed 128 characters and cannot include any special characters.



You must create at least two answers for each question. Until you've created two answers, both **SAVE** and **ADD NEW QUESTION** are disabled.

## Create Product Finder ✕

▶ Holiday Gift Finder

**Add Question**

Who will receive this gift?

Add a unique question containing between 4 and 64 characters.  
Question may not include special characters (^ \$ % & ' [ ] { } \ | < > / ? ~).

**Add Instructional Content**

Help your customer with more information for this question.

**User can select**

Multiple answers ⓘ  
Selecting multiple answers will lead the customer to a single path for all the answers to this question.

Only a single answer ⓘ  
If the customer can select only one answer, then each answer can lead to a different path or conclusion.

**Add answers**

Add a answer and select the next step for each answer. End of Questionnaire will show final results to the customer.

Spouse or romantic partner + SELECT NEXT QUESTION 📷 ⚙️ ⊖

Tween + SELECT NEXT QUESTION 📷 ⚙️ ⊖

Teen + SELECT NEXT QUESTION 📷 ⚙️ ⊖

Other adult + SELECT NEXT QUESTION 📷 ⚙️ ⊖

+ **ADD ANSWER**

At least two answers are required to create and save a question. Answers may not exceed 128 characters.  
Answer may not include special characters (^ \$ % & ' [ ] { } \ | < > / ? ~).

SAVE
DISCARD
ADD NEW QUESTION
PREVIEW

5. Optionally, add an image for each answer option. See [Adding Images to Answer Options](#) within this documentation for the steps.
6. Optionally, add a filter for each answer option. See [Adding Filters to Answer Options](#) within this documentation for the steps.
7. Click **ADD NEW QUESTION**.

## Create Product Finder

> Holiday Gift Finder

**Add Question**

Who will receive this gift?

Add a unique question containing between 4 and 64 characters.  
Question may not include special characters (^ \* + = [ ] { } \ | < > / ? ~).

**Add Instructional Content**

Help your customer with more information for this question.

**User can select**

Multiple answers ⓘ  
Selecting multiple answers will lead the customer to a single path for all the answers to this question.

Only a single answer ⓘ  
If the customer can select only one answer, then each answer can lead to a different path or conclusion.

**Add answers**

Add a answer and select the next step for each answer. End of Questionnaire will show final results to the customer.

Spouse or romantic partner	+	SELECT NEXT QUESTION	v	P	f	-
Tween	+	SELECT NEXT QUESTION	v	P	f	-
Teen	+	SELECT NEXT QUESTION	v	P	f	-
Other adult	+	SELECT NEXT QUESTION	v	P	f	-

At least two answers are required to create and save a question. Answers may not exceed 128 characters.  
Answer may not include special characters (^ \* + = [ ] { } \ | < > / ? ~).

➔

8. Repeat steps 4 through 7 as many times as necessary to create all but the last question-and-answer entry in the questionnaire.
9. Create the final question-and-answer entry.
  - a. Repeat steps 4 through 6.
  - b. Select **End of Questionnaire** for a multiple-choice final question, or select **End of Questionnaire** from the selector to the right of each answer option for a single-choice final question.
  - c. Click **SAVE**.

### Add Question

How much do you aim to spend on the gift?

Add a unique question containing between 4 and 64 characters.

Question may not include special characters (`# ^ + = [ ] { } \ | < > / ~`).

### Add Instructional Content

Help your customer with more information for this questionnaire.

### User can select

Multiple answers

Selecting multiple answers will lead the customer to a single path for all the answers to this question.

Only a single answer

If the customer can select only one answer, then each answer can lead to a different path or conclusion.

### Add answers

Add an answer and select the next step for each answer. End of Questionnaire will show final results to the customer.

Less than \$100	+	END OF QUESTIONNAIRE	▼			
\$100-\$200	+	END OF QUESTIONNAIRE	▼			
\$200-\$300	+	END OF QUESTIONNAIRE	▼			
\$300 or more	+	SELECT NEXT QUESTION	▼			

ADD ANSWER

At least two answers are required to create and save a question.

Answer may not include special characters (`# ^ + = [ ] { } \`).

Does the recipient have a metal pref...  
What kind of jewelry does the recipi...  
Do you want the item to include one ...

End of Questionnaire



**SAVE** **DISCARD** **ADD NEW QUESTION** **PREVIEW**

After you create all the question-and-answer entries, you must link answers in one question to the next question(s) they lead to. See [Configuring the Questionnaire Paths](#) for more information.

## Adding Filters to Answer Options

The product catalog attribute-based filters that you can apply to each answer option for each question in a Product Finder questionnaire make the products recommended all the more relevant to the answers the customer selected. These filters you build just like the recommendation filters used in recommendation strategies. See [Filters in Recommendation Strategies](#) for more information.



The attribute-based filters in Product Finder do not support dynamic values. You can only use static values.

Follow these steps to create a filter for an answer option.

1. Click the filter icon for an answer option.















Add answers


Less than \$100			
\$100-\$200			
\$200-\$300			
\$300 or more			

 ADD ANSWER

2. Click **ADD FILTER**.

Add answers

Less than \$100			
 <b>ADD FILTER</b> 			
\$100-\$200			
\$200-\$300			
\$300 or more			

 ADD ANSWER

3. Select an option from **SELECT ATTRIBUTE**. The options in the selector represent all the attributes in the product catalog associated with the recommendation strategy that you selected for the questionnaire, including custom attributes, along with all the attributes that are optional for any product catalog uploaded to the Monetate platform.

Add answers

Less than \$100

SELECT ATTRIBUTE ▼

\$100-\$200

\$200-\$300

\$300 or more

ADD ANSWER

4. Complete the filter equation by selecting an operator and then inputting a value.

Add answers

Less than \$100

Price < IS LESS THAN \$ 100

ADD FILTER

\$100-\$200

AND III

Price >= IS GREATER THAN OR EQUAL TO \$ 100

Price <= IS LESS THAN OR EQUAL TO \$ 200

= equals  
≠ does not equal  
>= is greater than or equal to  
> is greater than  
< is less than  
<= is less than or equal to

\$200-\$300

\$300 or more

ADD ANSWER

5. Repeat steps 2 through 4 as necessary to create multiple filters for one answer option. Connect the filters by setting the operator toggle to **AND** or to **OR**.

Add answers

🖼️ 📏 ⌵

Price

< IS LESS THAN

\$ 100

➕ ADD FILTER

🖼️ 📏 ⌵

AND

Price

>= IS GREATER THAN OR EQUAL TO

\$ 100

Price

<= IS LESS THAN OR EQUAL TO

\$ 200

➕ ADD FILTER

🖼️ 📏 ⌵

🖼️ 📏 ⌵

➕ ADD ANSWER

Applying filters to answer options that are too specific can limit the number of recommendations shown in the Product Finder results. Thoroughly test all possible pathways through a questionnaire in preview mode to ensure that the recommendation strategy you selected for the questionnaire and the answer option filters that you've applied return the quantity and quality of recommended products you want. See [Previewing the Questionnaire](#) for more information.

## Adding Images to Answer Options

You can add an image to accompany the text of an answer option or as an answer option without text. Follow these steps to add an image.















You can upload PNG, JPG, BMP, and GIF files. The image file's size cannot exceed 1 MB.


1. Click the image icon for an answer option.



### Add answers

Add an answer and select the next step for each answer. End of Questionnaire will show final results to the customer.

Gold		SELECT NEXT QUESTION			
Silver or white gold		SELECT NEXT QUESTION			
Rose gold		SELECT NEXT QUESTION			

















 ADD ANSWER


### 2. Upload the image one of three ways:

- Drag and drop the image file into the appropriate area of the Create Product Finder wizard.
- Click **Browse** in the Create Product Finder wizard, and then navigate to and select the image file.
- Input into **External Image Link** the URL for the image you want to appear with or as the answer.

### Add answers

Add an answer and select the next step for each answer. End of Questionnaire will show final results to the customer.

Gold		SELECT NEXT QUESTION			
<div style="border: 1px dashed gray; padding: 10px;"><p style="text-align: center;">Drop Your Image File Here</p><p style="text-align: center;"></p><p style="text-align: center;"><small>Max Filesize: 1 MB   Accepted types: png, jpg, bmp, gif</small></p><p style="text-align: center;"> <a href="#">Browse for a file</a></p></div> <div style="margin-left: 20px;"><p>Add Title Text </p><input type="text"/></div> <div style="margin-left: 20px;"><p>Add Alt Text</p><input type="text"/></div> <div style="margin-left: 20px;"><p>External Image Link </p><input type="text" value="https://companyName.com/images/image.jpg"/></div>					
Silver or white gold		SELECT NEXT QUESTION			
Rose gold		SELECT NEXT QUESTION			

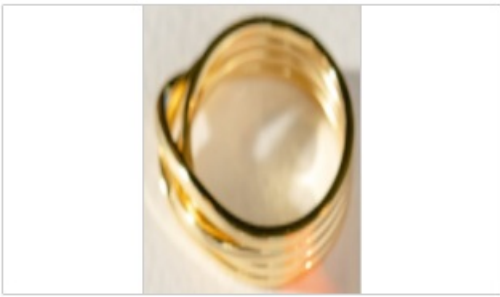
 ADD ANSWER

- ### 3. Type into **Add Title Text** a description of the image to appear as a tooltip when the customer's cursor hovers over the image.

### Add answers

Add a answer and select the next step for each answer. End of Questionnaire will show final results to the customer.

Gold



gold.jpg

**Add Title Text**

**Add Alt Text**

**External Image Link**

Silver or white gold

Rose gold

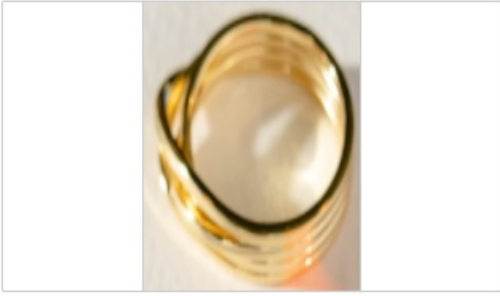
**ADD ANSWER**

4. Type into **Add Alt Text** a description of the image that can be read aloud by screen readers used by customers who are blind or visually impaired.

### Add answers

Add a answer and select the next step for each answer. End of Questionnaire will show final results to the customer.

Gold



gold.jpg

**Add Title Text**

**Add Alt Text**

**External Image Link**

Silver or white gold

Rose gold

**ADD ANSWER**

Repeat these steps for each answer option for the question.

# Configuring the Questionnaire Paths

Using the [Product Finder Template](#) Excel file when planning can help you plot each path a customer can take through a questionnaire.



You can only select one follow-up question for a multiple-choice question. You cannot assign each answer option its own follow-up question.

Click to expand the card for the first question that appears in the right-hand column of the wizard, and then click **EDIT**.

The screenshot shows the configuration interface for a 'Holiday Gift Finder' questionnaire. On the left, the configuration options include: 'Name your Product Finder' (set to 'Holiday Gift Finder'), 'Select Recommendation Strategy' (set to 'CK\_STRATEGY'), 'When do you want results returned?' (set to 'Return results when the user concludes the questionnaire'), and 'List any custom catalog fields you'd like returned to the client.' (set to 'LowStockLevel,FreeShipping'). On the right, a vertical list of question cards is shown. The first card, 'Holiday Gift Finder', is expanded to show three follow-up questions: 'Who will receive this gift?', 'Does the recipient have a metal preference?', and 'How much do you aim to spend on the gift?'. Each follow-up question has a red 'Please select next question.' prompt below it.

If the first question allows the customer to select only one answer, then for each answer option choose the next question that should appear from the selector to the right of the answer text field.

# Holiday Gift Finder

## Add Question

Who will receive this gift?

Add a unique question containing between 4 and 64 characters.

Question may not include special characters (^ # ^ + = [ ] { } \ | < > / ? ~).

## Add Instructional Content

Help your customer with more information for this questionnaire.

## User can select

Multiple answers ?

Selecting multiple answers will lead the customer to a single path for all the answers to this question.

Only a single answer ?

If the customer can select only one answer, then each answer can lead to a different path or conclusion.

## Add answers

Add an answer and select the next step for each answer. End of Questionnaire will show final results to the customer.

Spouse or romantic partner



SELECT NEXT QUESTION



Tween



SELECT NEXT QUESTION



Teen



SELECT NEXT QUESTION



Other adult



SELECT NEXT QUESTION



ADD ANSWER

At least two answers are required to create and save a question. Answers may not exceed 128 characters.

Answer may not include special characters (^ # ^ + = [ ] { } \ | < > / ? ~).

SAVE

DISCARD

ADD NEW QUESTION

PREVIEW

If the first question is multiple-choice, then select an option from **What question does the customer go next?**

## Holiday Gift Finder

### Add Question

What kind of jewelry does the recipient regularly wear?


Add a unique question containing between 4 and 64 characters.

Question may not include special characters (^ # ^ + = [ ] { } \ | < > / ~).

### Add Instructional Content

Help your customer with more information for this questionnaire.

### User can select

Multiple answers 

Selecting multiple answers will lead the customer to a single path for all the answers to this question.

Only a single answer 

If the customer can select only one answer, then each answer can lead to a different path or conclusion.

### What question does the customer go next?

SELECT NEXT QUESTION 

Does the recipient have a metal preference?

How much do you aim to spend on the gift?

Do you want the item to include one or more gemstones?

End of Questionnaire

One or more necklaces

Whether you're choosing the next question for a multiple-choice question or one for an answer option for a single-choice question, you always have **End of Questionnaire** available. The first question never appears as an option.



The selector always includes all questions that you've created excluding the first question. As a result, you can inadvertently create a question-and-answer loop if you're not paying close attention to your selections or are configuring the paths on the fly.

Click **SAVE** after you select the next question a customer should see after answering the questionnaire's first question.

### Add answers

Add a answer and select the next step for each answer. End of Questionnaire will show final results to the customer.

Spouse or romantic partner	➔	HOW MUCH DO YOU AIM TO SPEND ...	📷	🔍	⊖
Tween	➔	HOW MUCH DO YOU AIM TO SPEND ...	📷	🔍	⊖
Teen	➔	HOW MUCH DO YOU AIM TO SPEND ...	📷	🔍	⊖
Other adult	➔	HOW MUCH DO YOU AIM TO SPEND ...	📷	🔍	⊖

### ⊕ ADD ANSWER

At least two answers are required to create and save a question. Answers may not exceed 128 characters.

Answer may not include special characters ( # ^ + = [ ] { } \ | < > / ? ~ ).

**SAVE** **DISCARD** **ADD NEW QUESTION** **PREVIEW**

Repeat this process for each question in the questionnaire so that all answer options have a next question selected. Any question that doesn't have its answer options linked to a follow-up question is accompanied by a messaging indicating as much in the list of questions in the right-hand column of the Product Finder wizard.

The screenshot shows a list of questions in a configuration window. The questions are:

- Holiday Gift Finder
- Who will receive this gift?
- Does the recipient have a metal preference?
- How much do you aim to spend on the gift?
- What kind of jewelry does the recipient regula...
- Do you want the item to include one or more g...

Red arrows point to the right of the last three questions, indicating that a next question has not been selected for them. Below each of these three questions, the text "Please select next question." is displayed in red.

After you configure all the paths through the questionnaire, click **PREVIEW** to experience the questionnaire as if you were a site visitor.

# Previewing the Questionnaire


Use the preview function to thoroughly test the Product Finder's flow and to ensure that the recommendations returned match your expectations.

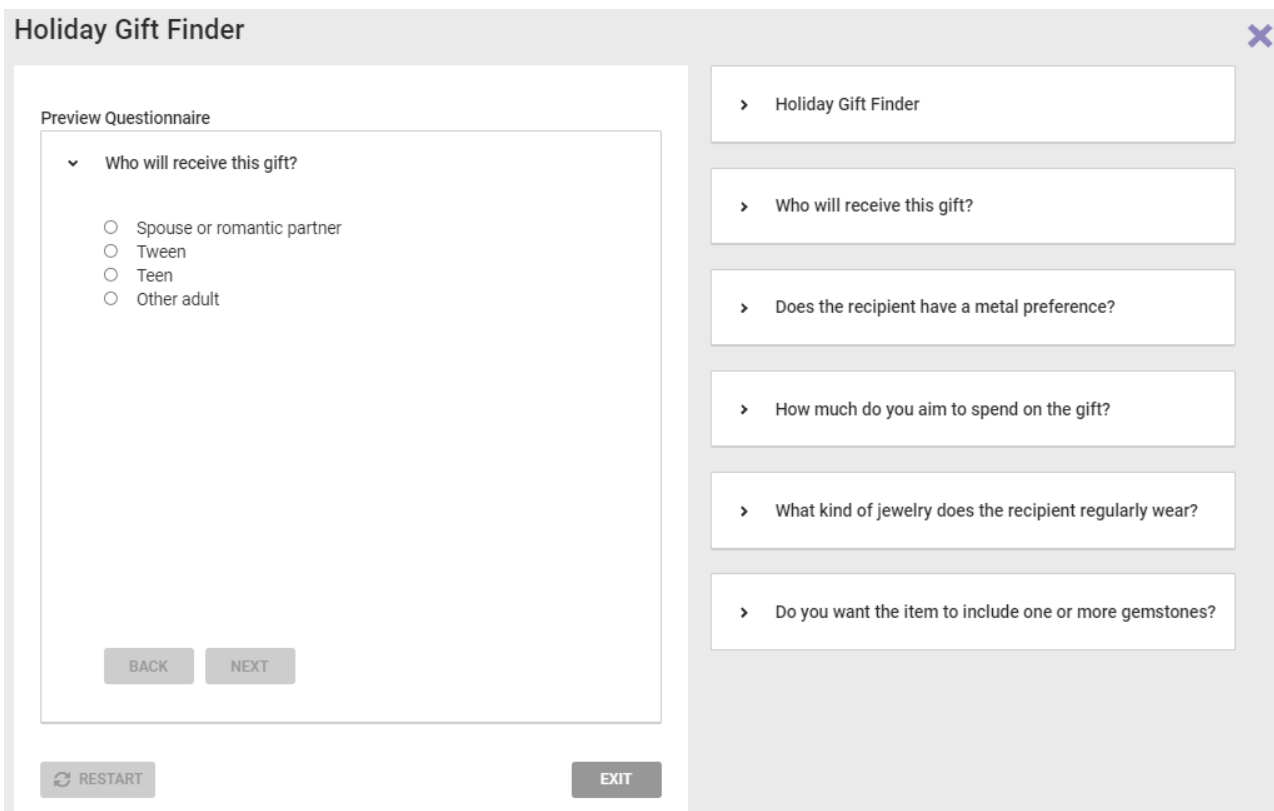
 **ADD ANSWER**

*At least two answers are required to create and save a question. Answers may not exceed 128 characters.  
Answer may not include special characters (^ # ^ + = [ ] { } \ | < > / ? ~).*

SAVE   DISCARD   **ADD NEW QUESTION**   **PREVIEW**

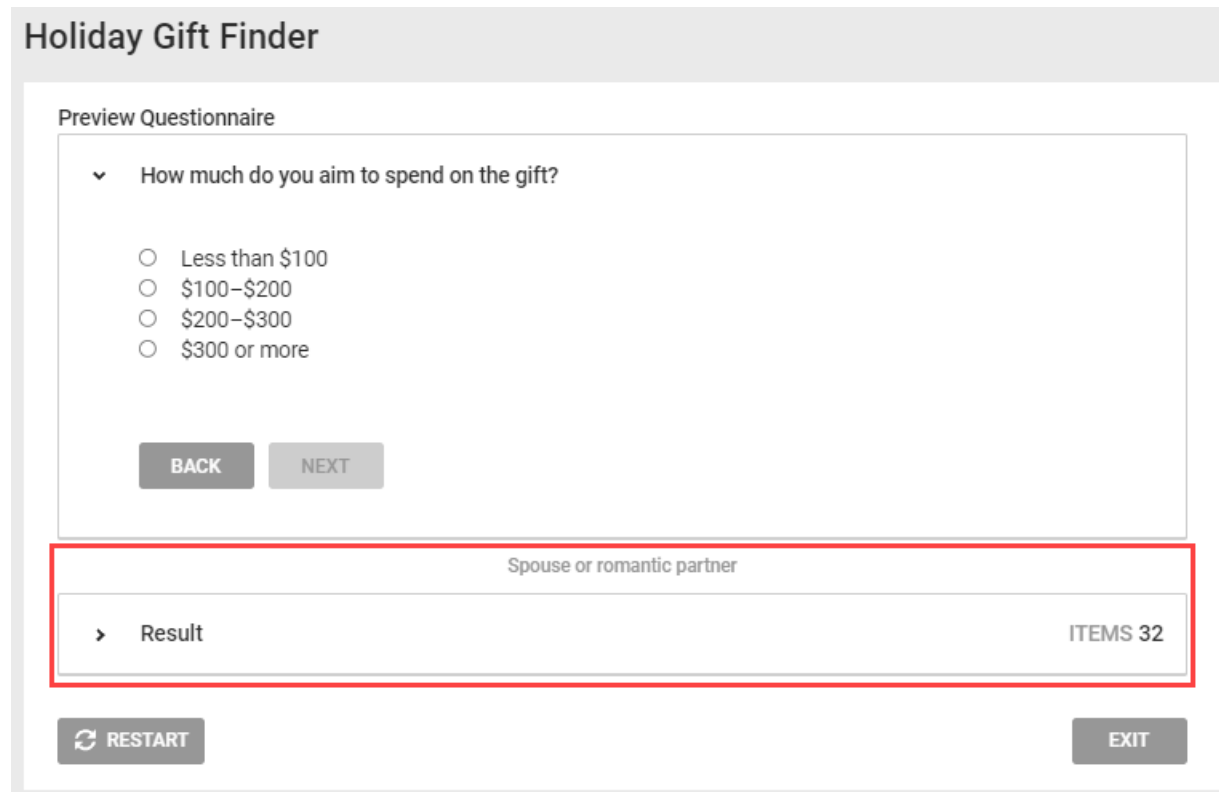
Regardless of the question-and-answer entry you're viewing when you click **PREVIEW**, the questionnaire always starts with the first question.

 The preview in the wizard does not show any custom styling for the questionnaire's appearance.

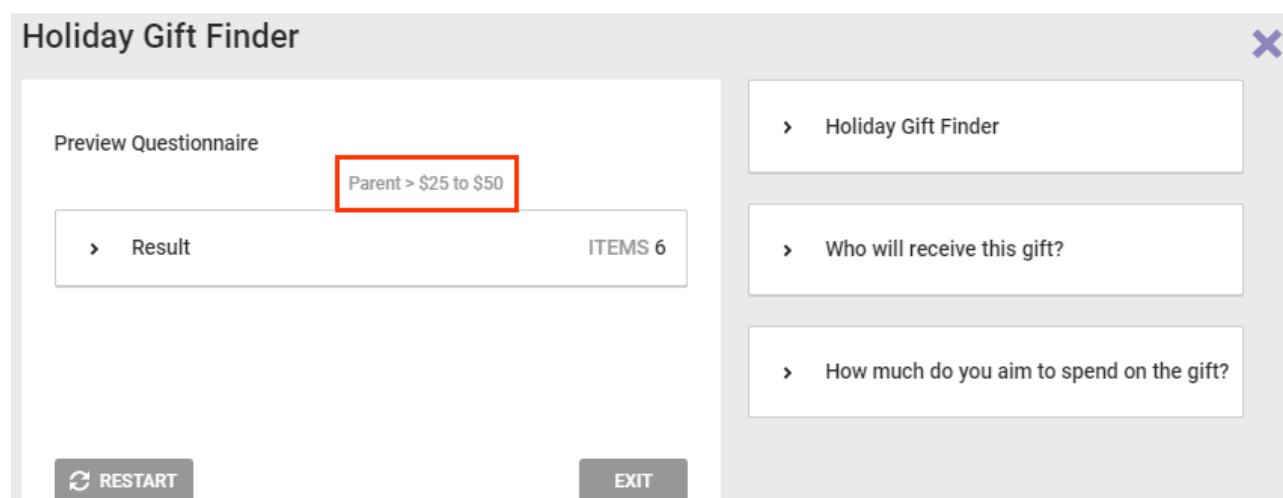


Test each possible path through the questionnaire to ensure that recommendations appear at the end or, if you selected **Return results after each question** when you configured the questionnaire, after answering each question.

So that you can keep track of the answer(s) you selected or the path you took, a breadcrumb trail showing that information appears above the table containing the resulting recommendations. This screenshot shows the breadcrumb trail and the results for a questionnaire configured to return recommendations after each answer.



This screenshot shows the breadcrumb trail for a questionnaire configured to show recommendations at the end.



To view the details about the resulting recommendations, click anywhere within the Result accordion heading to expand the table.



## Holiday Gift Finder

### Preview Questionnaire

Spouse or romantic partner > More than \$100

Result				ITEMS 7
PRODUCT TITLE	ITEM GROUP ID	ID	PRODUCT TYPE	
Chef Chez Vous Sous Vide Cooker	77	SLCTBS	P	
Chemex Coffeemaker 3 Cuph	88	CC3C	P	
1 L Le Parfait Jar	93	SLLPJ	P	
Chef Chez Vous Baking Cloche	98	CGLD	P	
Bespoke Edge-Grain Carving Board, Walnut	104	OFSUC	P	
Vino! Vino! Vino! Wine Decanter	107	DPB	P	
Das Kristallglas Champagne Flutes, Set of 4	111	SM13	P	

 RESTART

EXIT

At any time during the preview, you can edit a question-and-answer entry by clicking to expand its entry in the right-hand column of the wizard and then clicking **EDIT**. You can revise any aspect of the question and its answer options and then click **SAVE**. Click **PREVIEW** to test the questionnaire from the beginning, or click another question-and-answer entry in the right-hand column to make changes to it.

By thoroughly previewing the pathways through the questionnaire, you can better ensure that site visitors have a positive experience using it and that the questionnaire makes the impact you want it to make.

When you complete the preview, click **EXIT** to close the wizard and return to the Product Finder list page.