

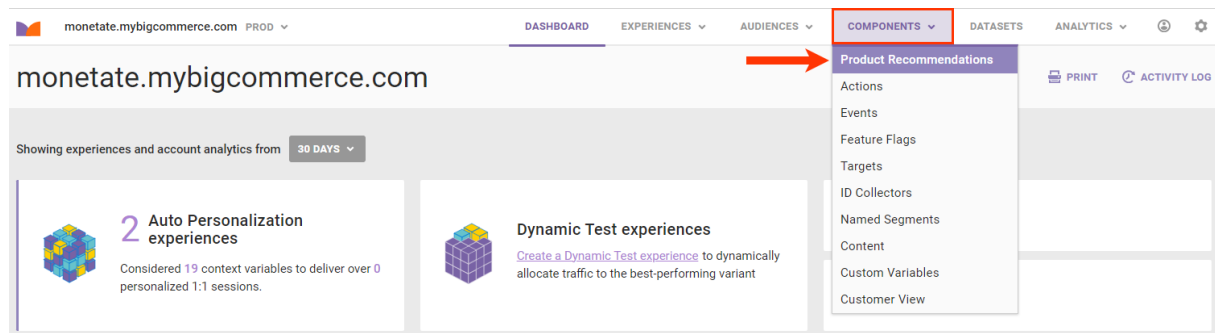
Global Settings



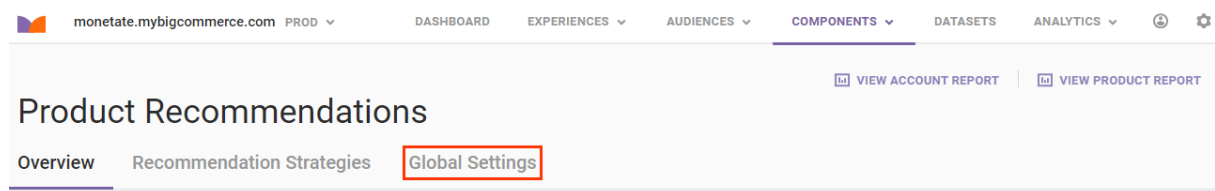
Contact your dedicated Customer Success Manager (CSM) if you want to add the Monetate Dynamic Bundles feature to your account.

The options on the Global Settings tab of the Product Recommendations page affect every recommendation strategy and Dynamic Bundle in the account. Follow these steps to access the settings.

1. Click **COMPONENTS** in the top navigation bar, and then select **Product Recommendations**.



2. Click the **Global Settings** tab.



On this tab you can adjust how much historical data a recommendation strategy considers as well as create product filters that apply to all recommendation strategies in the account.

These same settings apply to any bundles that you build if your contract includes the Monetate Dynamic Bundles feature.

Recommendation Lookback Period

This setting determines what lookback period option appears preselected for a recommendation algorithm with lookback period options when you create a new recommendation strategy or bundle. The default is 30 days. This setting *does not* prevent you from selecting a different lookback period in an individual recommendation strategy or bundle.

You can change this default setting on the **Global Settings** tab from 30 days to 2 days or 7 days. Click **SAVE** after you select a new setting.

Product Recommendations

[VIEW ACCOUNT REPORT](#) | [VIEW PRODUCT REPORT](#)

Overview Recommendation Strategies **Global Settings**

Recommendation Lookback Period

 **SAVE**

The selected period will be the default for all new recommendation strategies. All strategies can have their lookback days configured within the individual strategy page.

2 days

7 days

30 days

Be aware that a 30-day default lookback period in some situations might cause new products to take longer to appear in recommendations. For example, if you frequently update a product catalog in the account, then recommendations drawn from it based on 30 days' worth of historical data might include products that are no longer in that catalog. If you update product catalogs frequently, consider a shorter lookback period.

Offline Purchase Data

If you have uploaded at least one Offline Purchases dataset, then the **Global Settings** tab includes an optional setting so that you can make one Offline Purchases dataset the default used for every recommendation strategy and every bundle configured to include offline purchase data.



You must select an Offline Purchases dataset to use that data in recommendation strategies and in bundles. You cannot select an Offline Purchases dataset when creating an individual recommendation strategy or bundle.

Product Recommendations

[VIEW ACCOUNT REPORT](#) | [VIEW PRODUCT REPORT](#)

Overview Recommendation Strategies **Global Settings**

Recommendation Lookback Period

SAVE

The selected period will be the default for all new recommendation strategies. All strategies can have their lookback days configured within the individual strategy page.

2 days

7 days

30 days

Offline Purchase Data

Select offline purchase data for generating and filtering recommendation strategies. ⓘ

OFFLINE_PURCHASES_2024 ^

InStore_Sales_AllOutlets_2023

Offline_Purchases_2024

None

Even if you don't select an Offline Purchases dataset on the **Global Settings** tab, the options to include offline purchase data still appear on the recommendation strategy configuration page and the bundle configuration page. If you configure a recommendation strategy or bundle that in some way includes offline purchases data but haven't selected an Offline Purchases dataset on the **Global Settings** tab, you don't see an error message, and the strategy will not work as expected.

Global Filters

Global filters allow you to further refine the products included in recommendations and Dynamic Bundles. The filters you create on the **Global Settings** tab are applied to *all* recommendation strategies and bundles in the account, including existing strategies that are in use in experiences.

See [Filters in Strategies](#) for more information about the types of attribute-based filters you can create on the **Global Settings** tab.

Product Recommendations

Overview Recommendation Strategies **Global Settings**

Recommendation Lookback Period SAVE

The selected period will be the default for all new recommendation strategies. All strategies can have their lookback days configured within the individual strategy page.

2 days 7 days 30 days

Global Filters

Apply filters to products recommended for ALL strategies created for monetate.mybigcommerce.com

Availability = equals AVAILABILITY OF PRODUCT CURRENTLY BEING VIEWED USE STATIC VALUE

ADD FILTER

Furthermore, you *cannot* modify global filters when you're creating a recommendation strategy or bundle. The filters you create on the **Global Settings** tab appear in a recommendation strategy and bundle, but the ability to edit their values is disabled.

Global Filters ↔

The following filters have been applied to ALL strategies created for this monetate.mybigcommerce.com. These can be edited in the Global Recommendation Settings page.

Availability = EQUALS AVAILABILITY OF PRODUCT CURRENTLY BEING VIEWED

Recommendation Filters

Would you like to filter what's recommended in this strategy?

Item Group Id (Produc... = EQUALS ITEM GROUP ID OF PRODUCT CURRENTLY BEING VIEWED USE STATIC VALUE

ADD FILTER

Creating a Global Filter

Follow these steps to create a global filter to apply to all existing and future recommendation strategies and bundles.

1. Click **COMPONENTS** in the top navigation bar, and then select **Product Recommendations**.
2. Click the **Global Settings** tab.
3. Click **ADD FILTER** in the Global Filters section.

Product Recommendations VIEW ACCOUNT REPORT VIEW PRODUCT REPORT

Overview Recommendation Strategies **Global Settings**

Recommendation Lookback Period

The selected period will be the default for all new recommendation strategies. All strategies can have their lookback days configured within the individual strategy page. SAVE

2 days 7 days 30 days

Global Filters

Apply filters to products recommended for ALL strategies created for monetate.mybigcommerce.com

ADD FILTER ←

4. Choose an attribute option and then complete the filter equation.

Global Filters

Apply filters to products recommended for ALL strategies created for monetate.mybigcommerce.com

ADD FILTER

5. Optionally, repeat steps 3 and 4 to add additional filters, if necessary. Click the logic connector toggle from **AND** to **OR** as necessary.

Global Filters

Apply filters to products recommended for ALL strategies created for oakbrookcenter.com

AND III ←

Age Group = EQUALS AGE GROUP OF PRODUCT CURRENTLY BEING VIEWED USE STATIC VALUE

Availability = EQUALS AVAILABILITY OF PRODUCT CURRENTLY BEING VIEWED USE STATIC VALUE

ADD FILTER

- Click **SAVE**, and then click **OK** to acknowledge the warning modal reminding users that global filters apply to all recommendations.

Product Recommendations

VIEW ACCOUNT REPORT | VIEW PRODUCT REPORT

Overview Recommendation Strategies **Global Settings**

Recommendation Lookback Period

The selected period will be the default for all new recommendation strategies. All strategies can have their lookback days configured within the individual strategy page.

2 days 7 days 30 days

Global Filters

Apply filters to products recommended for ALL strategies created for oakbrookcenter.com

AND III

Age Group = EQUALS AGE GROUP OF PRODUCT CURRENTLY BEING VIEWED USE STATIC VALUE

AND Availability = EQUALS AVAILABILITY OF PRODUCT CURRENTLY BEING VIEWED USE STATIC VALUE

ADD FILTER

See [Filters in Recommendations](#) for guidance on creating filters and understanding the logic behind them.