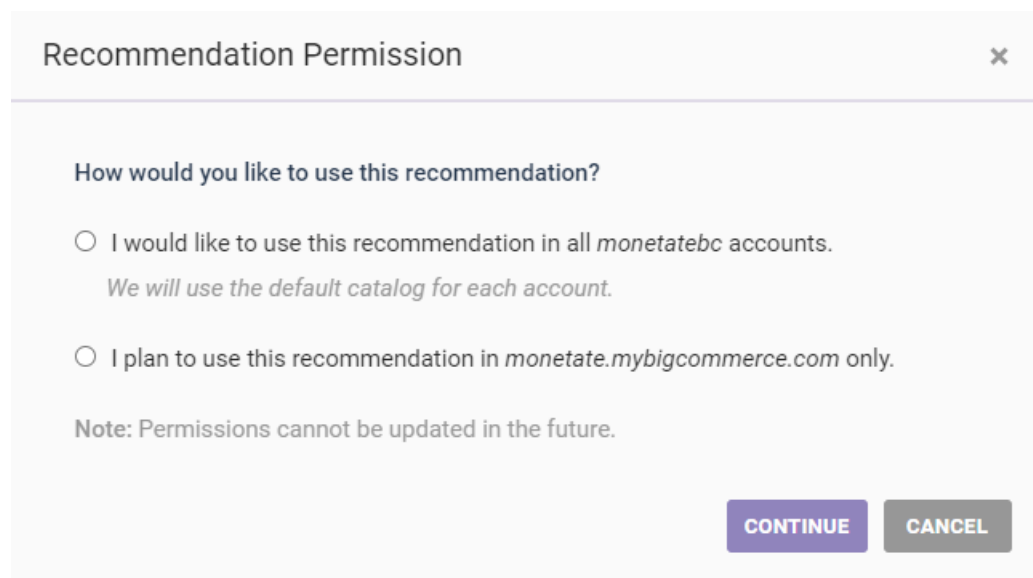


Global and Local Recommendation Strategies

When you create a new recommendation strategy, you must designate it in the Recommendation Permission modal as a global strategy, which makes it accessible to all your accounts, or as a local strategy, which makes it accessible only to the current account.



Recommendation Permission ×

How would you like to use this recommendation?

I would like to use this recommendation in all *monetatebc* accounts.
We will use the default catalog for each account.

I plan to use this recommendation in *monetate.mybigcommerce.com* only.

Note: Permissions cannot be updated in the future.

CONTINUE **CANCEL**

Global strategies are best when each account has an assigned default product catalog and the strategy uses algorithmic methods of generating recommendations.



You cannot use custom catalog attributes for recommendation filters in global recommendation strategies.

Local strategies are best when the strategy draws from a product catalog that isn't the account's default catalog or uses nonalgorithmic methods of generating recommendations, such as a [Recommendations dataset](#).

For example, you have three accounts, each corresponding to a country-specific domain name:

- **Account.US** – For the `yoursite.us` domain; default product catalog is `US_PRODUCTS`
- **Account.CA** – For the `yoursite.ca` domain; default product catalog is `CA_PRODUCTS`
- **Account.UK** – For the `yoursite.uk` domain; default product catalog is `UK_PRODUCTS`

If you create a global recommendation strategy using the Viewed and Also Viewed recommendation algorithm, then recommendations for `yoursite.us` visitors come from `US_PRODUCTS`, from `CA_PRODUCTS` for `yoursite.ca` visitors, and from `UK_PRODUCTS` for `yoursite.uk` visitors. Each account maintains its own Viewed and Also Viewed list for its respective default product catalog.

This screenshot shows how the **Product Catalog** selector is fixed on **ACCOUNT LEVEL DEFAULT** in a global recommendation strategy, indicating the account's default product catalog is used for the strategy. Because the

selector is disabled, you cannot choose a different catalog.

BACK TO RECOMMENDATION STRATEGIES

New Recommendation Strategy

Created: Oct 17, 2024 | Available to all monetatebc accounts

Recommendation Type Preview Results | View Associated Experiences

Select the Product Catalog, the Recommendation Algorithm, and the associated options.

Product Catalog

ACCOUNT LEVEL DEFAULT

Recommendation Algorithm **Data comes from**

PURCHASED AND ALSO PURCHASED **MONETATE.MYBIGCOMMERCE.COM**

You can, however, select a different product catalog when you create a local recommendation strategy. Continuing with the previous example, you could create a local recommendation strategy for Account.US and then select a product catalog uploaded to that account for the strategy to use.

BACK TO RECOMMENDATION STRATEGIES

New Recommendation Strategy

Created: Oct 17, 2024 | Available to monetate.mybigcommerce.com only

Recommendation Type Preview Results | View Associated Experiences

Select the Product Catalog, the Recommendation Algorithm, and the associated options.

Product Catalog

CK_PRODUCTS (DEFAULT)

Search

- CK_Products (Default)
- pc_2024-08-29-001
- pc_2024-08-15-002
- pc-2024-08-03
- pc-2024-07-21
- pc-2024-07-10
- LN_CB_Catalog
- LN_Fall
- LN_Summer

Recommendation Algorithm **Data comes from**

PURCHASED AND ALSO PURCHASED **MONETATE.MYBIGCOMMERCE.COM**

Be familiar with the contents of a product catalog you select for a local strategy so that you can better ensure the strategy, once configured, returns recommendations as you anticipate.

Duplicating Recommendations Experiences

When you duplicate an experience with a recommendations action within the same account, that account always has access to the same global and local recommendation strategies. Duplicating a recommendations experience from one account into another account, however, has certain limitations that you must understand.

If the experience you want to duplicate contains a recommendations action that uses a global recommendation strategy, then the same global strategy is used in any other account into which you're duplicating the experience. Furthermore, any updates to that strategy (for example, changing recommendation filters) affect all experiences using that strategy across accounts.

If the experience you want to duplicate contains a recommendations action that uses a local recommendation strategy and that strategy uses the account's default product catalog and doesn't use a recommendations dataset, then it's converted into a global strategy when duplicated into another account. This screenshot shows the message that appears in the user interface when you successfully duplicate a recommendations experience that uses a local recommendation strategy from one account into another.

Duplicated Experience Confirmation [X]

The experience has been duplicated into the following accounts:

ACCOUNT ▾	DUPLICATED EXPERIENCE
monetate.mybigcommerce.uk Prod	Holidays_2022 ✓

During duplication the following recommendation strategies with local permissions were swapped/created for recommendation strategies with global permissions.

ACCOUNT ▾	DUPLICATED EXPERIENCE	OLD STRATEGY	NEW STRATEGY
monetate.mybigcommerce.uk Prod	Holidays_2022	Default Product Catalog in Local Strategy	New Recommendation Strategy

OK

If the recommendations experience employs a local recommendation strategy that uses a product catalog that *is not* the default product catalog or that uses a recommendations dataset, then the strategy can't be converted into a global strategy and the experience can't be duplicated across accounts. This screenshot shows the error message that appears when you try to duplicate a recommendations experience powered by a local recommendation strategy using a recommendations dataset into another account.

Duplicated Experience Confirmation ✕

The experience has been duplicated into the following accounts:

ACCOUNT ▾	DUPLICATED EXPERIENCE
monetate.mybigcommerce.uk Prod (Error)	Experience cannot be duplicated for Recommendation set uses an onboarded data set (new_items_recommendation). ✕

OK

Another factor to consider when duplicating a recommendations experience is if its recommendation strategy uses market-specific data. If it does, then you can only duplicate the experience into one of the accounts that belongs to the market selected in the recommendation strategy. However, if that recommendation strategy doesn't use the native account's default product catalog, then you cannot duplicate the experience into another account that also belongs to the same market. See [Create a Recommendation Strategy for Market-Level Recommendations](#) for more information.