

Create a Recommendation Strategy

Follow these steps to create a recommendation strategy.

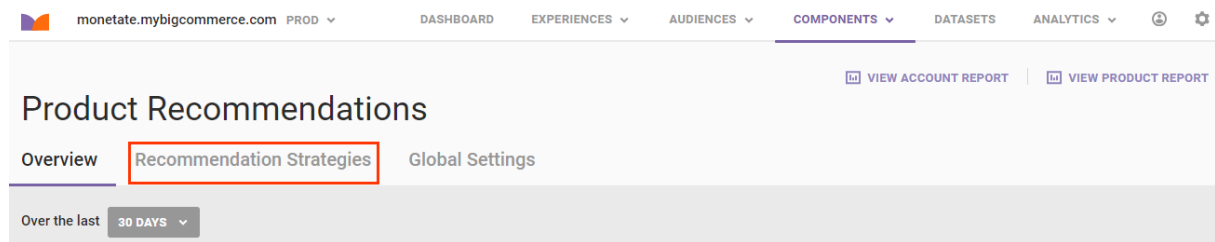


Follow the steps in [Create a Recommendation Strategy with a Recommendations Dataset](#) if you want to use a Recommendations dataset instead of a recommendation algorithm in a recommendation strategy.

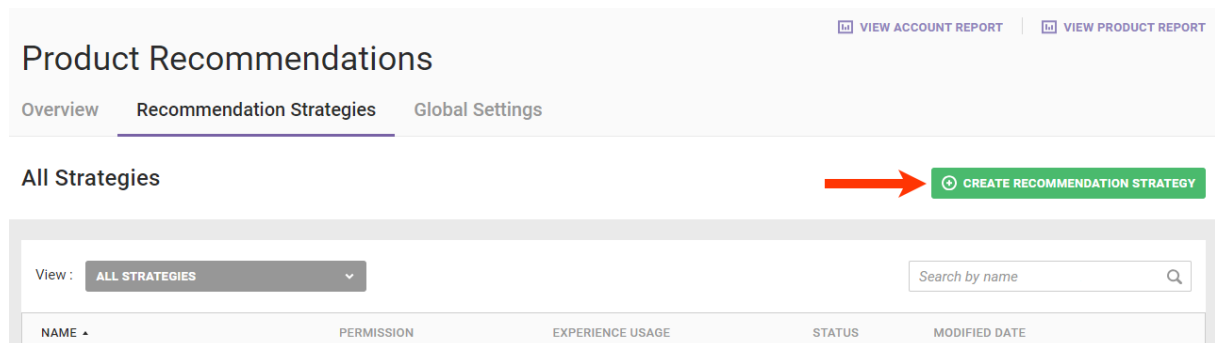
Follow the steps in [Create a Recommendation Strategy for Market-Level Recommendations](#) if you want to use data from markets as part of a recommendation strategy.

Follow the steps in [Create a Recommendation Strategy with Offline Purchases Data](#) if you want to use data from an Offline Purchases dataset as part of a recommendation strategy.

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



2. Click **CREATE RECOMMENDATION STRATEGY**.



3. Select the option on the Recommendation Permission modal to make the strategy either global or local, and then click **CONTINUE**. For more information see [Global and Local Recommendation Strategies](#).



You cannot change the strategy permission after you click **CONTINUE**.

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](#)

4. Name the strategy. Click the placeholder title, type the name into the text field, and then click the green checkmark.

 This field can contain a maximum of 64 characters.

5. If you're creating a local strategy and if the account has multiple product catalogs, then select one from **Product Catalog**.

[← BACK TO RECOMMENDATION STRATEGIES](#)


New Recommendation Strategy ✎

[SAVE](#) [CANCEL](#) [...](#)


🕒 Created: Jan 2, 2025 | Available to monetate.mybigcommerce.com only

Recommendation Type View Associated Experiences

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



Product Catalog ⊙

CK_PRODUCTS (DEFAULT) ▲ 

Search 🔍

- CK_Products (Default)
- Catalog_01012024
- Dec-Promos
- Late-Fall-Early-Winter
- Autumn-Promos
- Late-Spring-Summer
- Summer-Promos
- Spring-Promos
- Back-to-School

6. Select an option from **Recommendation Algorithm** to determine which algorithm the strategy uses to populate the recommendations. See [Recommendation Algorithms](#) for more information.


Recommendation Type [View Associated Experiences](#)

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

Product Catalog ⓘ

CK_PRODUCTS (DEFAULT) ▾

Recommendation Algorithm ⓘ

PURCHASED AND ALSO PURCHASED ▲ 

STANDARD

Top Selling by Purchase Count

Top Selling by Gross Revenue

Most Viewed (Product Detail Page)

Purchased and Also Purchased

Viewed and Also Viewed

Viewed and Later Purchased

Recently Viewed

PREMIUM

Newest

Items Frequently Bought Together ▾

7. If you selected a [collaborative recommendation algorithm](#) in [step 6](#), then select from **Base Recommendation** on the type of customer behavior or other context on which to base the recommendations.



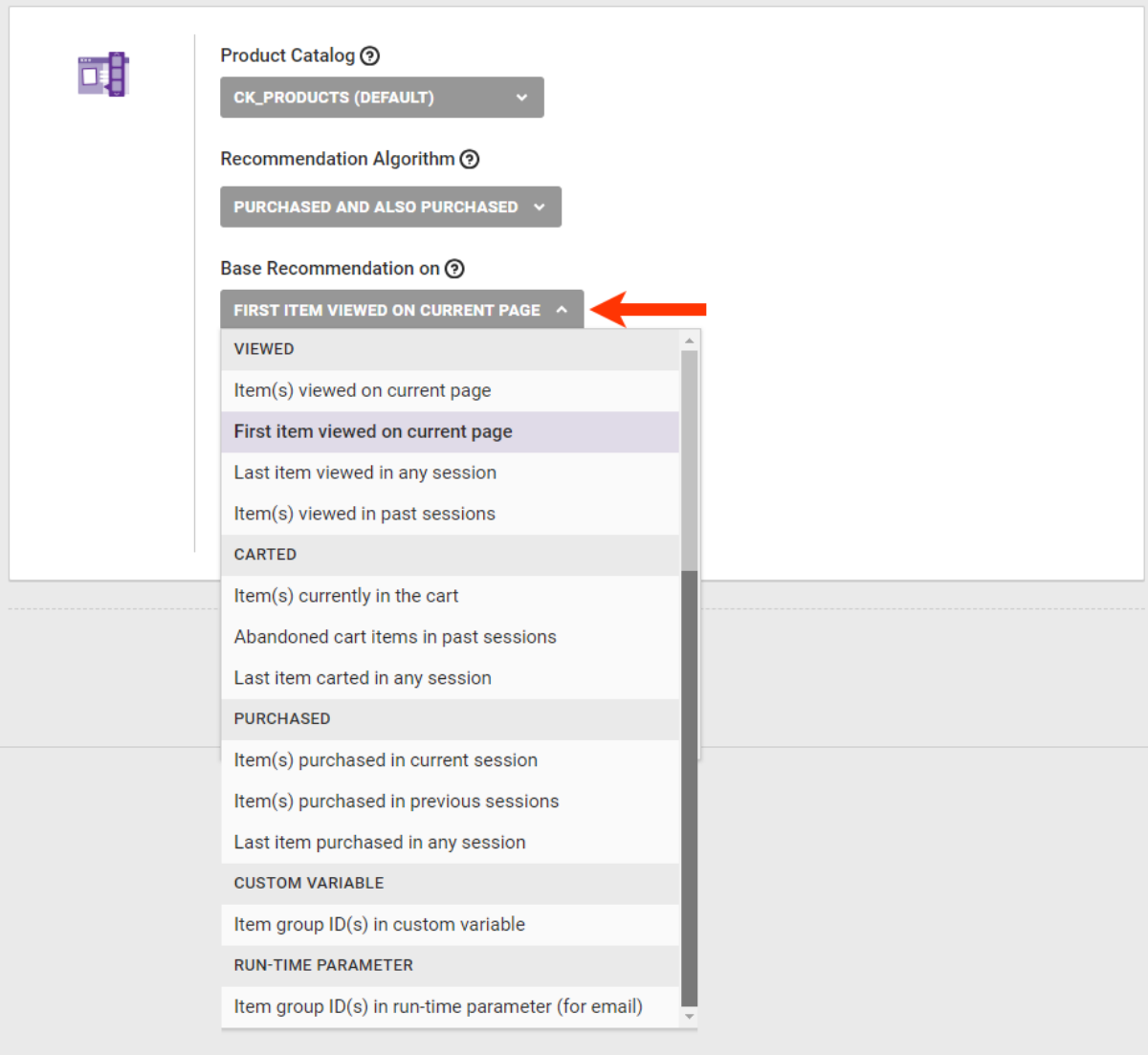
The **Item group ID(s) in custom variable** option allows you to base recommendations on `item_group_id` values passed at run time in custom variables.

The **Item group ID(s) in run-time parameter (for email)** option is part of the [Product Recommendations for Email](#) feature. If you select this option, you can use up to five `item_group_id` values passed in a run-time parameter for a Product Recommendations for Email experience. See [Preparing the Generated HTML in Run-Time Context for Recommendations Email Experiences](#).

Recommendation Type

[View Associated Experiences](#)

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



Product Catalog ⓘ
CK_PRODUCTS (DEFAULT) ▼

Recommendation Algorithm ⓘ
PURCHASED AND ALSO PURCHASED ▼

Base Recommendation on ⓘ
FIRST ITEM VIEWED ON CURRENT PAGE ▲

VIEWED

- Item(s) viewed on current page
- First item viewed on current page**
- Last item viewed in any session
- Item(s) viewed in past sessions

CARTED

- Item(s) currently in the cart
- Abandoned cart items in past sessions
- Last item carted in any session

PURCHASED

- Item(s) purchased in current session
- Item(s) purchased in previous sessions
- Last item purchased in any session

CUSTOM VARIABLE

- Item group ID(s) in custom variable

RUN-TIME PARAMETER

- Item group ID(s) in run-time parameter (for email)


8. If you selected **Item group ID(s) in custom variable** in [step 7](#), then take the following actions.
 - a. Optionally, select **Pin products in custom variable to front of recommendation results** if you want the products corresponding to the `item_group_id` value(s) derived from the custom variable to appear at the beginning of the recommendation results.



If you select this option, be aware that pinned products configured in the recommendation strategy appear *after* any pinned products configured in a recommendations action that uses the recommendation strategy.

Recommendation Type View Associated Experiences

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



Product Catalog ⓘ

CK_PRODUCTS (DEFAULT) ▼

Recommendation Algorithm ⓘ

ITEMS FREQUENTLY BOUGHT TOGETHER ▼

Base Recommendation on ⓘ

ITEM GROUP ID(S) IN CUSTOM VARIABLE ▼ Pin products in custom variable to front of recommendation results.

Custom Variable ⓘ

Lookback Period ⓘ


7 DAYS ▼

- b. Type into **Custom Variable** a custom variable that your site passes to Monetate using either the `setCustomVariables` method call in the Monetate API implementation or the `monetate:context:CustomVariables` in the Engine API implementation.

i The custom variable value can contain a comma-separated list of up to five `item_group_id` values.

Recommendation Type View Associated Experiences

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



Product Catalog ⓘ

CK_PRODUCTS (DEFAULT) ▼


Recommendation Algorithm ⓘ

ITEMS FREQUENTLY BOUGHT TOGETHER ▼

Base Recommendation on ⓘ

ITEM GROUP ID(S) IN CUSTOM VARIABLE ▼ Pin products in custom variable to front of recommendation results.

Custom Variable ⓘ



Lookback Period ⓘ

7 DAYS ▼

9. If you selected **Item group ID(s) in run-time parameter (for email)** in step 7, then optionally select **Pin products in run-time parameter to front of recommendation results.**

i If you select this option, be aware that pinned products configured in the recommendation strategy appear *after* any pinned products configured in a recommendations action that uses the recommendation strategy.

Recommendation Type View Associated Experiences

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

Product Catalog ⓘ

CK_PRODUCTS (DEFAULT) ▾

Recommendation Algorithm ⓘ

PURCHASED AND ALSO PURCHASED ▾

Base Recommendation on ⓘ

ITEM GROUP ID(S) IN RUN-TIME PARAMETER (FOR EMAIL) ▾

Pin products in run-time parameter to front of recommendation results.

A run-time parameter "pt_based_on_item_group_id" and placeholder will be added to your generated HTML for email when using this strategy

Lookback Period ⓘ

7 DAYS ▾

10. Select an option from **Lookback Period** if you selected a recommendation algorithm that requires a time frame from which to collect data for determining recommended products.

Recommendation Type View Associated Experiences

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

Product Catalog ⓘ

CK_PRODUCTS (DEFAULT) ▾

Recommendation Algorithm ⓘ

PURCHASED AND ALSO PURCHASED ▾

Base Recommendation on ⓘ

ITEM(S) VIEWED IN PAST SESSIONS ▾

Lookback Period ⓘ

30 DAYS ▲

2 days

7 days

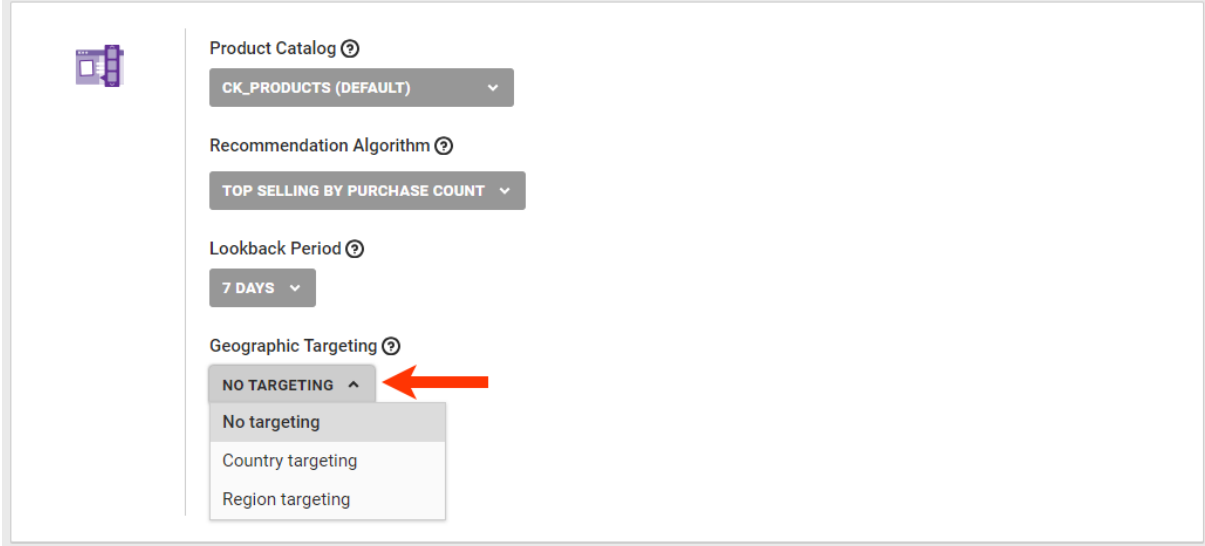
30 days

11. If you selected an eligible recommendation algorithm in [step 6](#), then select an option from **Geographic Targeting** if you want the strategy to also consider the customer's location to populate the recommendations:
 - **Country targeting** — Only products relevant to the customer's country are recommended
 - **Region targeting** — Only products relevant to the customer's region, as defined in MaxMind's GeoIP2 database, are recommended

Recommendation Type

[View Associated Experiences](#)

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



Product Catalog ⓘ
CK_PRODUCTS (DEFAULT) ▾

Recommendation Algorithm ⓘ
TOP SELLING BY PURCHASE COUNT ▾

Lookback Period ⓘ
7 DAYS ▾

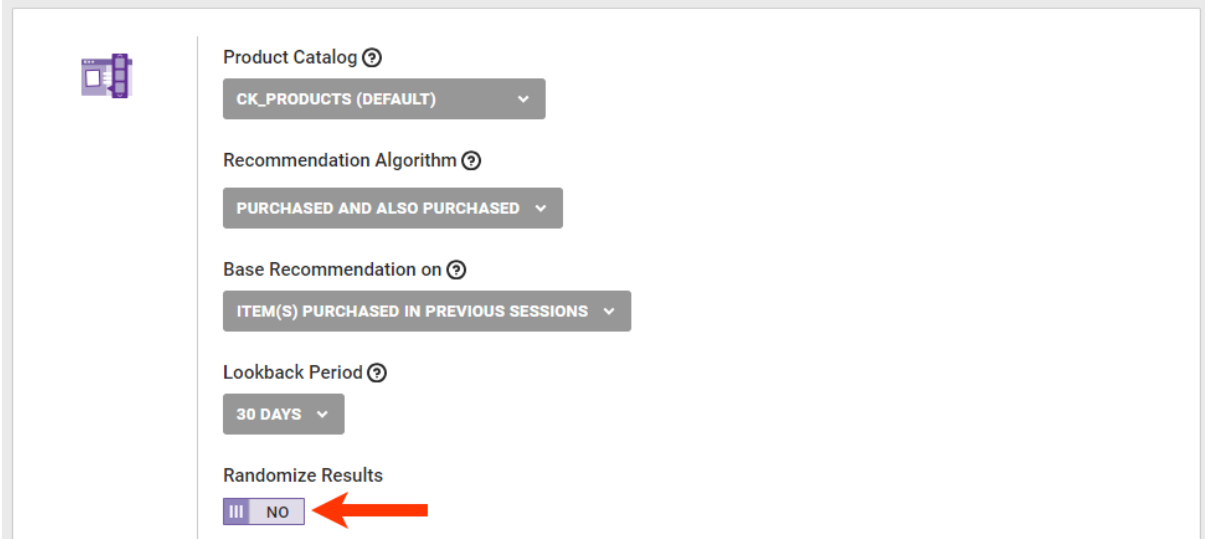
Geographic Targeting ⓘ
NO TARGETING ▲
No targeting
Country targeting
Region targeting

- Optionally, toggle **Randomize Results** to **YES** if you want the order in which recommended products appear in the slider to be less systematized.

Recommendation Type

[View Associated Experiences](#)

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



Product Catalog ⓘ
CK_PRODUCTS (DEFAULT) ▾

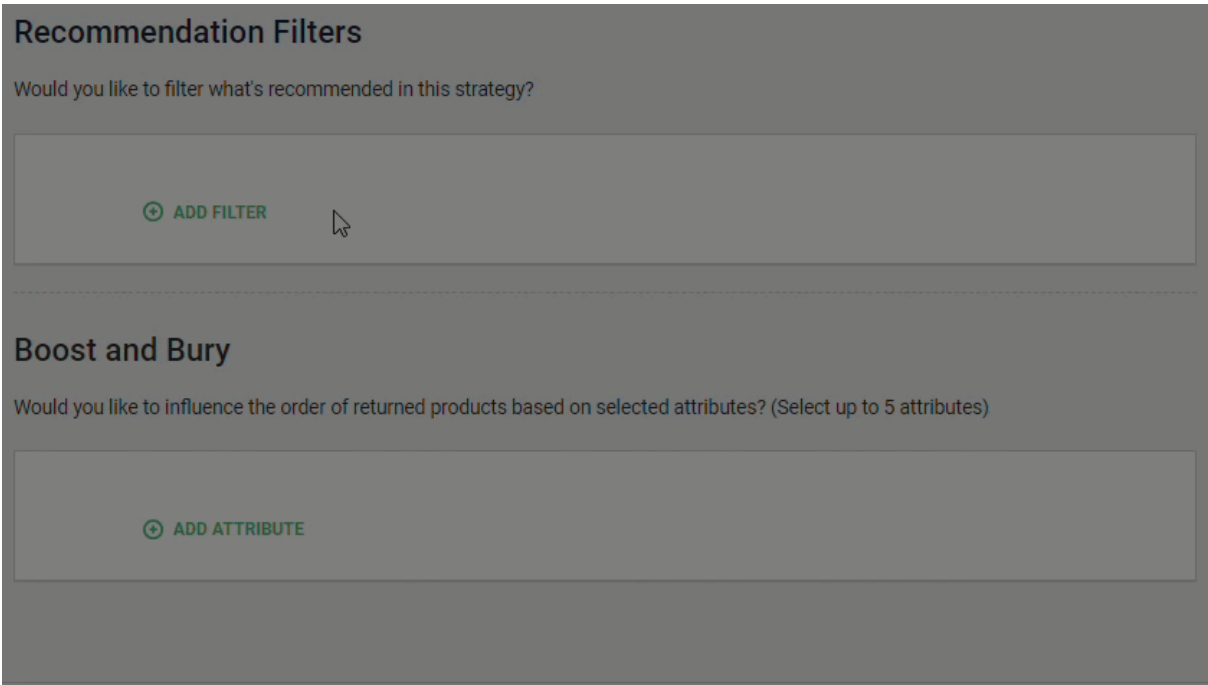
Recommendation Algorithm ⓘ
PURCHASED AND ALSO PURCHASED ▾

Base Recommendation on ⓘ
ITEM(S) PURCHASED IN PREVIOUS SESSIONS ▾

Lookback Period ⓘ
30 DAYS ▾

Randomize Results
III NO

- To further refine the items included in the strategy, click **ADD FILTER**, select an option from **SELECT ATTRIBUTE**, and then complete the filter equation. Repeat this step as necessary to add as many recommendation filters as you believe the strategy needs. For more information see [Filters in Recommendations](#).

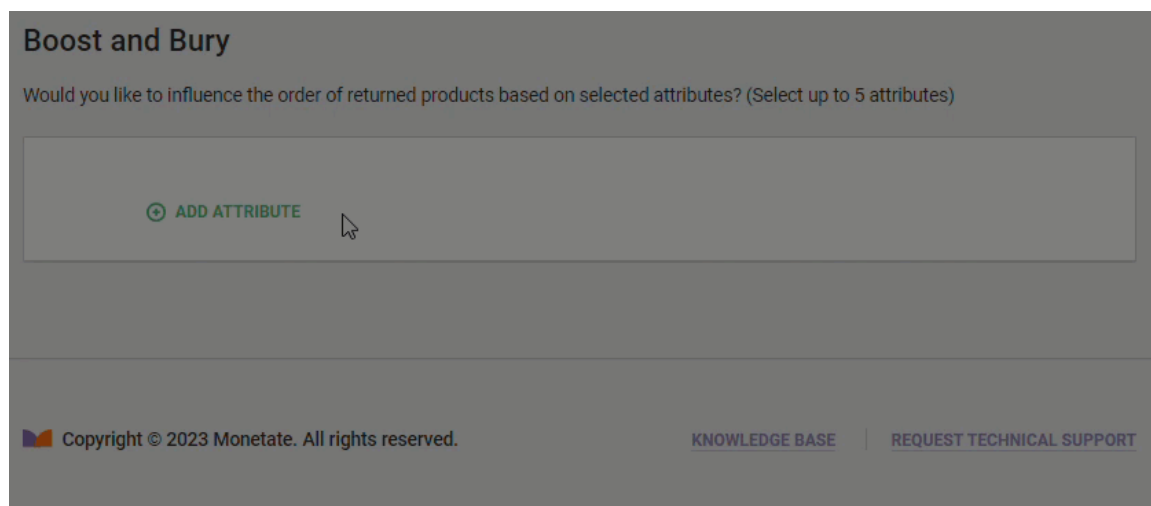


14. Optionally, configure up to five Boost and Bury filters to influence if recommended products that meet that filtering criteria are more likely (boost) or less likely (bury) to appear for the customer.



Contact your dedicated Customer Success Manager (CSM) if you want the Boost and Bury feature enabled.

- a. Click **ADD ATTRIBUTE** and then select an option from **SELECT ATTRIBUTE**.



- b. Complete the filtering equation.

Boost and Bury

Would you like to influence the order of returned products based on selected attributes? (Select up to 5 attributes)

Price \$ **BOOST** None +100

[ADD ATTRIBUTE](#)

- c. Select **Boost** to promote the products that meet the filtering criteria, or select **Bury** to suppress them.

Boost and Bury

Would you like to influence the order of returned products based on selected attributes? (Select up to 5 attributes)

Price \$ **BOOST** None +100

[ADD ATTRIBUTE](#)

- d. Adjust the slider to determine by what percentage the products that meet the filtering criteria are boosted or buried.

i You can only set the percentage using the slider and cannot type a number into the text field to the left of it. Furthermore, you can only adjust the percentage in increments of 10.

Boost and Bury

Would you like to influence the order of returned products based on selected attributes? (Select up to 5 attributes)

Price \$ **BOOST** None +100

[ADD ATTRIBUTE](#)

- e. Repeat steps 14a through 14d to add up to four more independent Boost and Bury filters. See [Using Multiple Boost and Bury Filters](#) to better understand how having more than one Boost and Bury filter can impact the recommendations.

Boost and Bury

Would you like to influence the order of returned products based on selected attributes? (Select up to 5 attributes)

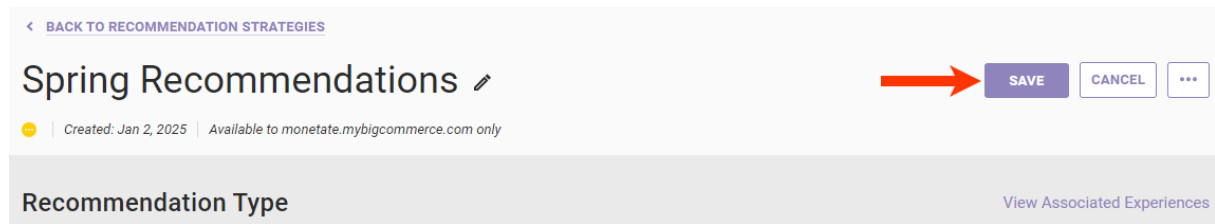
Quantity **BURY** None +100

Product Type **BOOST** None +100

Price \$ **BOOST** None +100

[ADD ATTRIBUTE](#)

15. Click **SAVE**.



After you save the strategy, you can preview it from the configuration page in certain situations. See [Preview a Recommendation Strategy](#) for more information.

Using Multiple Boost and Bury Filters

While Boost and Bury filters look much like recommendation filters, they have some key differences:

- You can only add a total of five Boost and Bury filters to a recommendation strategy.
- You don't join multiple Boost and Bury filters with the AND or the OR logical operator.
- The order in which you add multiple Boost and Bury filters to a recommendation strategy doesn't impact how much a qualifying product is ultimately boosted or buried because each filter is independent and not connected in a logic sequence with the filter that might be listed before or after it.

To better understand how Boost and Bury filters impact a product's final relevancy score for a recommendations action, consider the following example.

A recommendation strategy uses the Top Selling by Purchase Count recommendation algorithm that considers 30 days of historical data and doesn't include geographic targeting. It has a recommendation filter based on the `age_group` attribute to exclude products for infants and children. At this stage of processing, five products identified by the recommendation algorithm and recommendation filter have these relevancy scores:

- Product A: 50%
- Product B: 30%
- Product C: 20%
- Product D: 10%
- Product E: 5%

The recommendation strategy's three Boost and Bury filters are then applied:

- Quantity < less than "1000" BURY -90%
- Product type = equals (Starts With) "Jackets" BOOST 50%
- Price \geq greater than or equal to "59.95" BOOST 80%

Of the identified five products, only products B and C meet at least one of the Boost and Bury criteria:

- **Product B**
 - Product type = "Jackets"
 - Price = "\$49.95"
 - Inventory = "100"
- **Product C**
 - Product type = "Jackets"

- Price = "\$79.95"
- Inventory = "2000"

Two of the three Boost and Bury filters apply to product B, and the impact of those applicable filters to product B's relevancy score is calculated as follows:

$$30\% \times (1 - 90\%) \times (1 + 50\%) = 4\%$$

Like product B, only two of the Boost and Bury filters apply to product C, but both filters are boosting measures. The impact of those filters to product C's relevancy score is calculated as follows:

$$20\% \times (1 + 50\%) \times (1 + 80\%) = 54\%$$

Because of the impact of the Boost and Bury filters on just these two products, the final relevancy scores for the five products are as follows:

- Product C: 54%
- Product A: 50%
- Product D: 10%
- Product E: 5%
- Product B: 4%

The impact of the Boost and Bury filters on the final recommendations relevancy scores of products B and C wouldn't change if those filters were listed in a different order within the recommendation strategy because of how the calculations are made.