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**.

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**.

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

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.

8. If you selected a collaborative recommendation algorithm in step 6, then optionally toggle **Prepend context item in recommendation** to **YES** if you want the product on which the recommendation results are based to appear at the beginning of the recommendation results.

> If you enable this option, be aware that the context product appears *after* any pinned products configured in a recommendations action that uses the recommendation strategy.

9. If you selected **Item group ID(s) in custom variable** in step 7, then 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.

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

10. Select an option from **Lookback Period** if you selected a recommendation algorithm that requires you to set how much historical data the strategy considers when calculating results.

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

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

13. 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. See Boost and Bury for more information.

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.