

Create a Recommendation Strategy for Market-Level Recommendations

Follow these steps to create a recommendation strategy with a recommendation type that draws on data from a [market](#).

Ensure that the account has at least one market. See [Create a Market](#) for the steps.

1. Click **COMPONENTS** in the top navigation bar, select **Product Recommendations**, and then click the **Recommendation Strategies** tab on the Recommendations page.
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 about how global and local settings work within strategies, 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**.

If you select a product catalog that *is not* the default one and you select **Specific Market** or **[retailer short name]** in step 7, then you cannot duplicate into any other account a recommendations experience that uses the recommendation strategy you're creating.

6. Select one of the following options from **Recommendation Algorithm**:
 - **Top Selling by Purchase Count** – Populates with products from the catalog with the highest purchase quantity; eligible for geographic targeting
 - **Top Selling by Gross Revenue** – Populates with products from the catalog with the highest gross revenue; eligible for geographic targeting
 - **Most Viewed (Product Detail Page)** – Populates with products from the catalog with the most product detail page views
 - **Purchased and Also Purchased** – Populates with products from the recommendation strategy's selected

product catalog that other customers most frequently purchased along with the product(s) that meet the criteria that you select from **Base Recommendation on** when configuring the recommendation strategy

- **Viewed and Also Viewed** – Populates with products from the recommendation strategy's selected product catalog most frequently viewed after viewing the product(s) that meet the criteria that you select from **Base Recommendation on** when configuring the recommendation strategy
- **Trending Items by Purchase Count** – Populates with products that sold the most in the last 7 days compared to the 30 days prior; premium option

You must contact your dedicated Customer Success Manager (CSM) to request that the Purchased and Also Purchased and Viewed and Also Viewed algorithms be made available for use with market-level data in a recommendation strategy.

7. Select **Specific Market** from **Data comes from**.

The **[current account]** option limits the strategy's algorithm to considering only data from the account in which you're building the strategy. The **[retailer short name]** option allows the algorithm to consider data from all accounts within your Monetate implementation.

8. Choose an option from **Select a Market**.

9. If you selected **Purchased and Also Purchased** or **Viewed and Also Viewed** 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](#).

10. If you selected **Purchased and Also Purchased** or **Viewed and Also Viewed** 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.

11. If you selected **Item group ID(s) in custom variable** in [step 9](#), then type into **Custom Variable** a custom variable

that your site passes to Monetate using either the `setCustomVariables` method call in the Monetate JavaScript API implementation or `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.

12. Select an option from **Lookback Period** if you selected a recommendation type that requires a timeframe from which to collect historical data.
13. If you selected **Top Selling by Purchase Count**, **Top Selling by Gross Revenue**, or **Most Viewed (Product Detail Page)** in [step 6](#), then select an option from **Geographic Targeting** if you want the strategy to 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 by MaxMind's GeoIP2 database, are recommended
14. Optionally, toggle **Randomize Results** to **YES** if you want the order in which recommended products appear in the slider to be less systematized. See [Product Recommendations Overview](#) for more information about how this setting works.
15. Optionally, add one or more recommendation filters to further refine the products included in the recommendations. For more information about filtering options and logic, see [Filters in Recommendations](#).
 - a. Click **ADD FILTER**.
 - b. Select an option from **SELECT ATTRIBUTE**.
 - c. Complete the filter equation.
 - d. Repeat this step as necessary to add as many recommendation filters as you believe the strategy needs.
16. 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.
17. 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.
