

Create a Recommendation Strategy with Offline Purchases Data



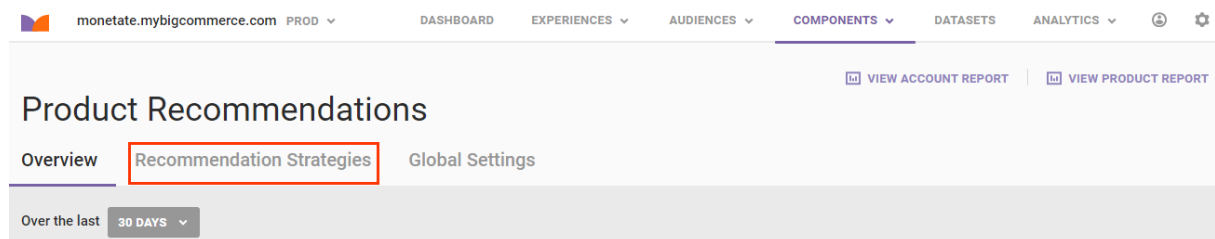
The Offline Purchases Data feature is part of the Monetate Personalization Enhanced product bundle and the Monetate Personalization Suite. Contact your dedicated Customer Success Manager for more information.

Follow these steps to create a recommendation strategy that uses data from the Offline Purchases dataset [set as the default](#) on the **Global Settings** tab of the Product Recommendations page.

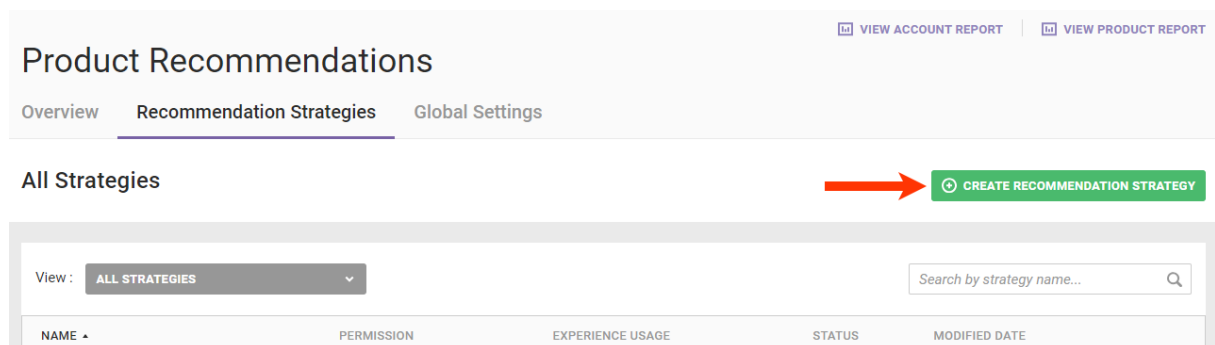


If an Offline Purchases dataset is not set as the default on the **Global Settings** tab, then any recommendation strategy configured with offline purchases data will not work as expected. See [Global Settings](#) for more information.

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.
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: 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)
▲

🔍

- 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

comes from


MONETATE.MYBIGCOMMERCE.COM
▼

6. Select from **Recommendation Algorithm** one of the [algorithms](#) that's eligible for use with offline purchases data:
 - Top Selling by Purchase Count
 - Top Selling by Gross Revenue
 - Purchased and Also Purchased

- Trending Items by Purchase Count

Recommendation Type [Preview Results](#) | [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
- Trending Items by Purchase Count
- Similar Items


Including ⓘ

ONLINE PURCHASES ONLY ▾

7. Select either **Offline purchases only** or **Online and offline purchases** from **Including**.

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 ▾

Including ⓘ

ONLINE PURCHASES ONLY ▲

- Online purchases only
- Offline purchases only
- Online and offline purchases

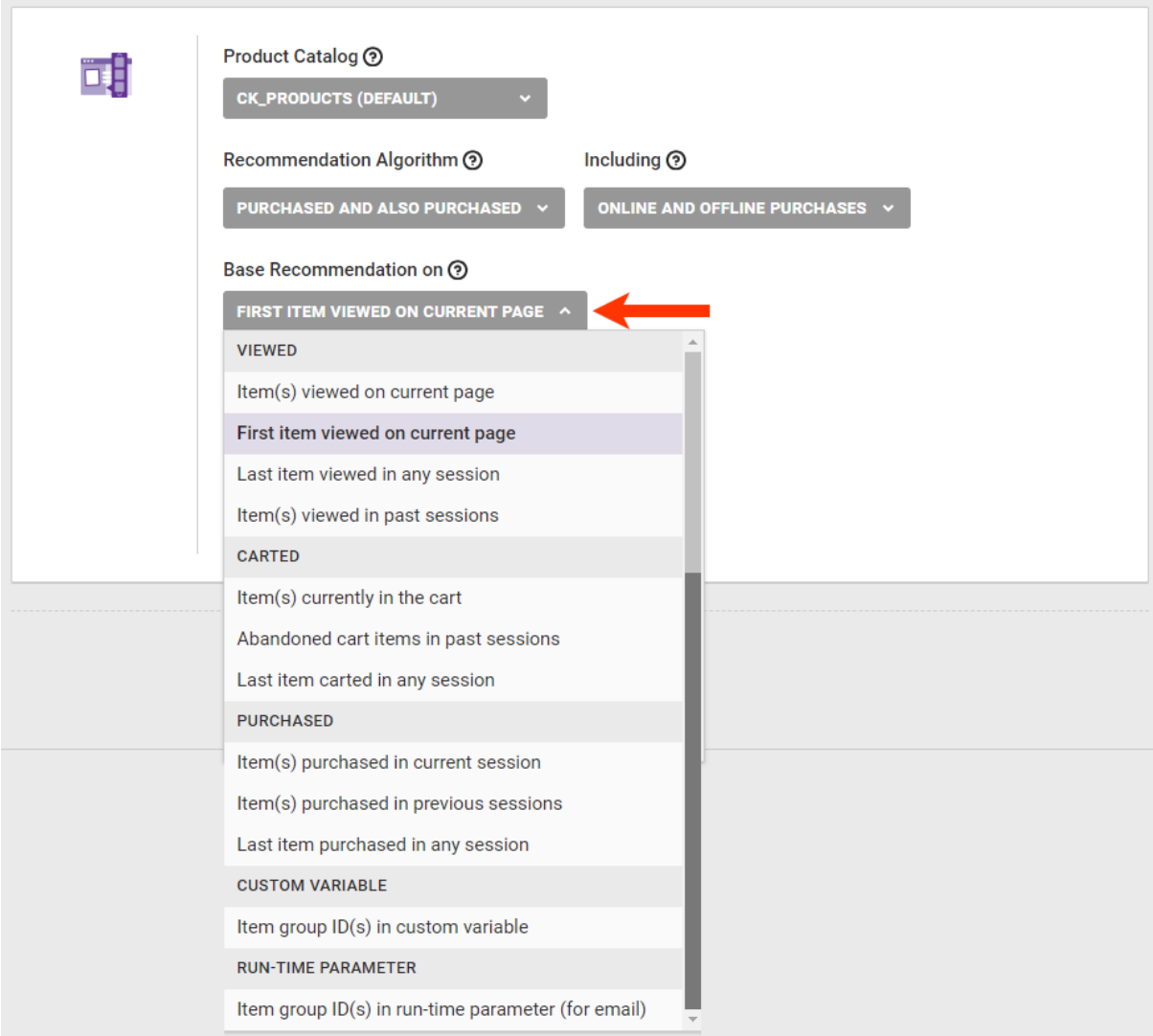
8. If you selected **Purchased and Also Purchased** in [step 6](#), then select from **Base Recommendation on** the type of customer behavior or other context on which to base the recommendations.

i The **Item group ID(s) in run-time parameter (for email)** option is part of the [Product Recommendations for Email](#) feature. If you select it, 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 ⓘ **Including** ⓘ
PURCHASED AND ALSO PURCHASED ▾ ONLINE AND OFFLINE PURCHASES ▾

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

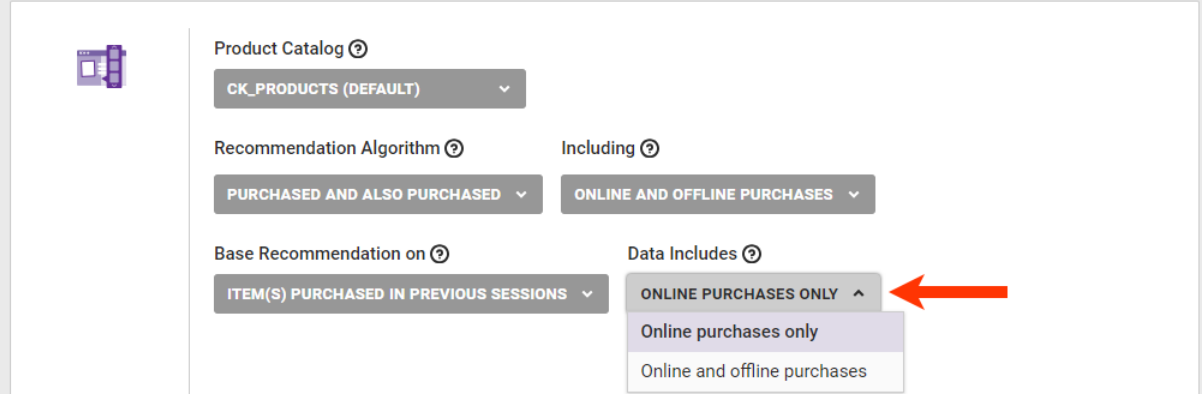
- Item group ID(s) in run-time parameter (for email)

9. If you selected **Item(s) purchased in previous sessions** or **Last item purchased in any session** in step 8 and if Offline Purchases Data is [set as the default](#) on the **Global Settings** tab, then select an option from **Data Includes**:
- **Online purchases only** – Offline purchases aren't included in the customer purchase history
 - **Online and offline purchases** – offline purchases along with online purchases are included in the customer purchase history

Recommendation Type

[View Associated Experiences](#)

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



Product Catalog [?]
CK_PRODUCTS (DEFAULT) ▾

Recommendation Algorithm [?] Including [?]
PURCHASED AND ALSO PURCHASED ▾ ONLINE AND OFFLINE PURCHASES ▾

Base Recommendation on [?] Data Includes [?]
ITEM(S) PURCHASED IN PREVIOUS SESSIONS ▾ ONLINE PURCHASES ONLY ▲
Online purchases only
Online and offline purchases

10. If you selected **Item group ID(s) in custom variable** in [step 8](#), then take the following actions.
- 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.

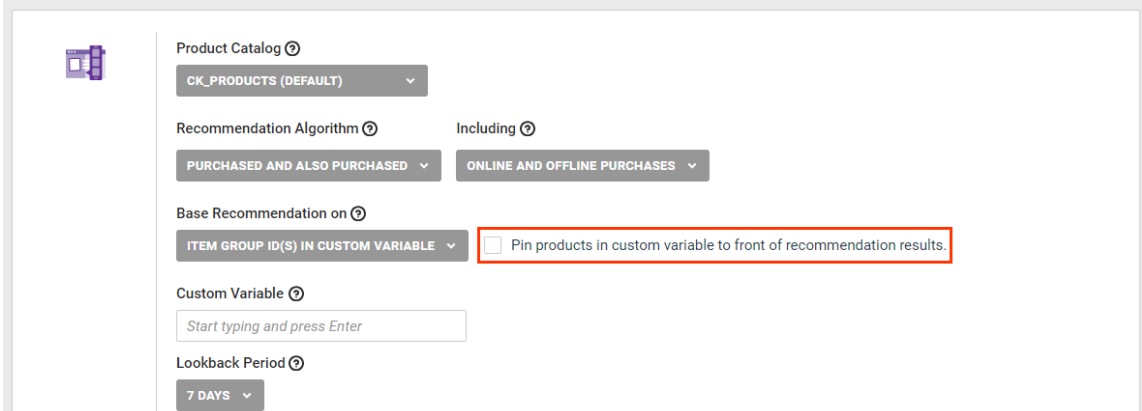


If you select this option, be aware that pinned products configured in the recommendation strategy appear *after* any pinned products configured in a recommendations action that uses the recommendation strategy.

Recommendation Type

[View Associated Experiences](#)

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



Product Catalog [?]
CK_PRODUCTS (DEFAULT) ▾

Recommendation Algorithm [?] Including [?]
PURCHASED AND ALSO PURCHASED ▾ ONLINE AND OFFLINE PURCHASES ▾

Base Recommendation on [?] Pin products in custom variable to front of recommendation results.

Custom Variable [?]
Start typing and press Enter

Lookback Period [?]
7 DAYS ▾


- 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.

Recommendation Type View Associated Experiences

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



Product Catalog ⓘ

CK_PRODUCTS (DEFAULT) ▼


Recommendation Algorithm ⓘ **Including** ⓘ

PURCHASED AND ALSO PURCHASED ▼ ONLINE AND OFFLINE PURCHASES ▼

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 ▼


- If you selected **Item group ID(s) in run-time parameter (for email)** in [step 8](#), then optionally select **Pin products in run-time parameter to front of 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 ⓘ **Including** ⓘ

PURCHASED AND ALSO PURCHASED ▼ ONLINE AND OFFLINE PURCHASES ▼

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 ⓘ

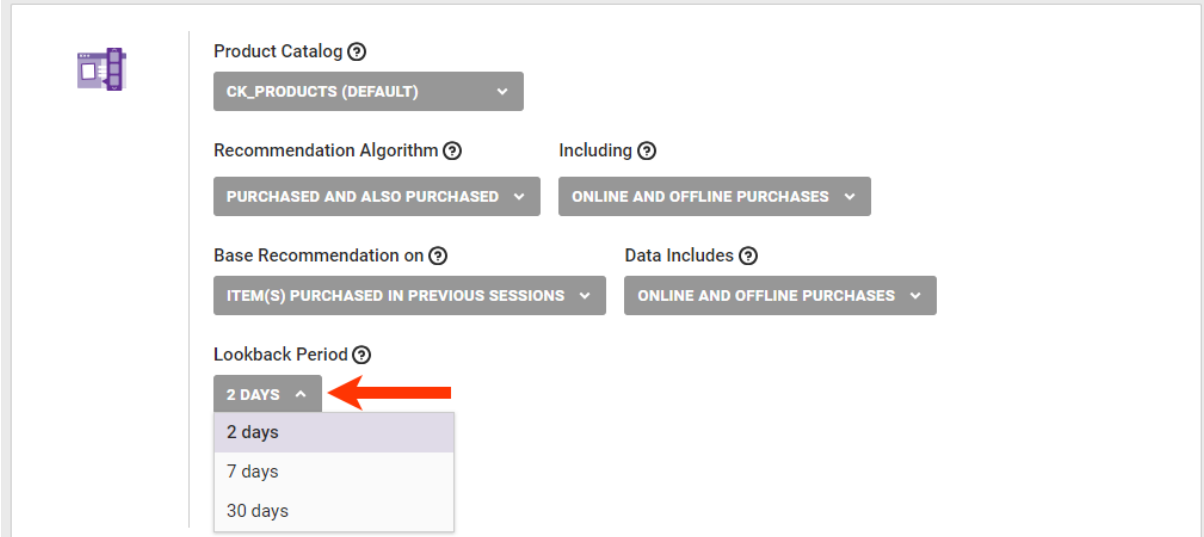
7 DAYS ▼

- If you selected any recommendation algorithm except for **Trending Items by Purchase Count** in [step 6](#), then select an option from **Lookback Period** to set how much historical data the strategy considers when calculating results.

Recommendation Type

[View Associated Experiences](#)

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



Product Catalog ⓘ
CK_PRODUCTS (DEFAULT) ▾

Recommendation Algorithm ⓘ Including ⓘ
PURCHASED AND ALSO PURCHASED ▾ ONLINE AND OFFLINE PURCHASES ▾

Base Recommendation on ⓘ Data Includes ⓘ
ITEM(S) PURCHASED IN PREVIOUS SESSIONS ▾ ONLINE AND OFFLINE PURCHASES ▾

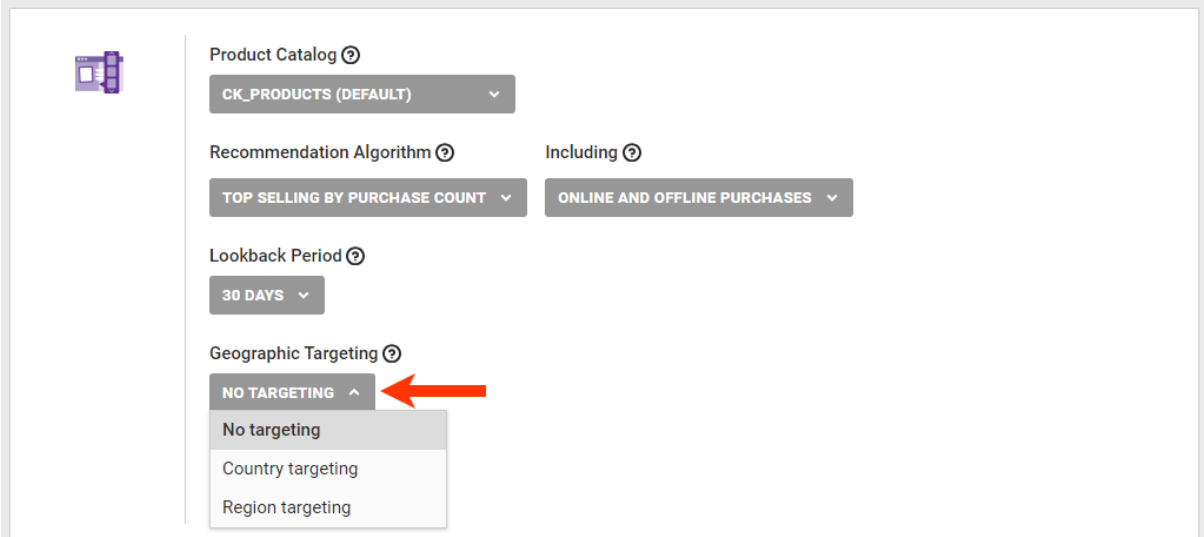
Lookback Period ⓘ
2 DAYS ▲ (selected)
2 days
7 days
30 days

13. If you selected **Top Selling by Purchase Count** or **Top Selling by Gross Revenue** in [step 6](#), then optionally 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 ⓘ Including ⓘ
TOP SELLING BY PURCHASE COUNT ▾ ONLINE AND OFFLINE PURCHASES ▾

Lookback Period ⓘ
30 DAYS ▾

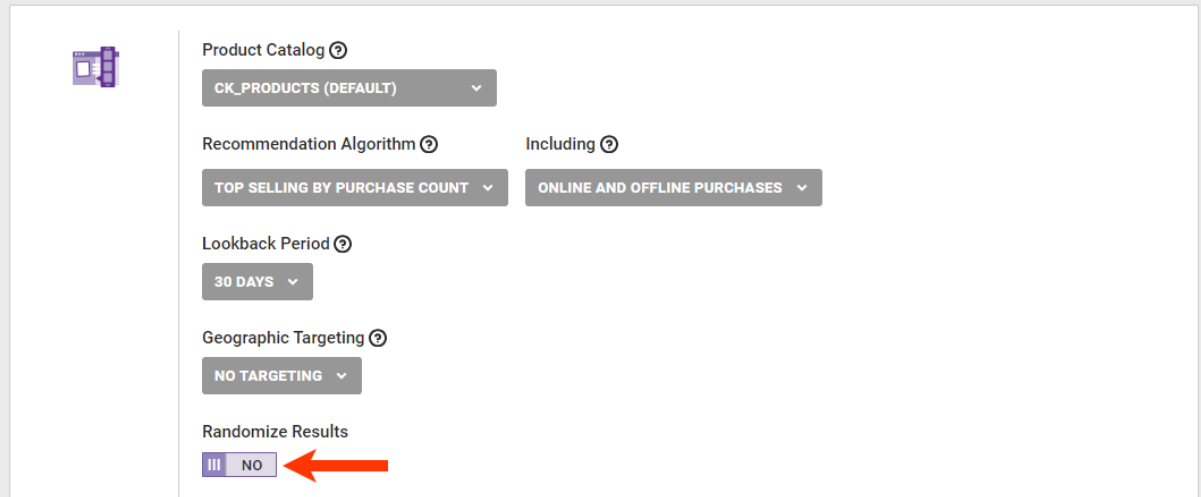
Geographic Targeting ⓘ
NO TARGETING ▲ (selected)
No targeting
Country targeting
Region targeting

14. 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) ▾

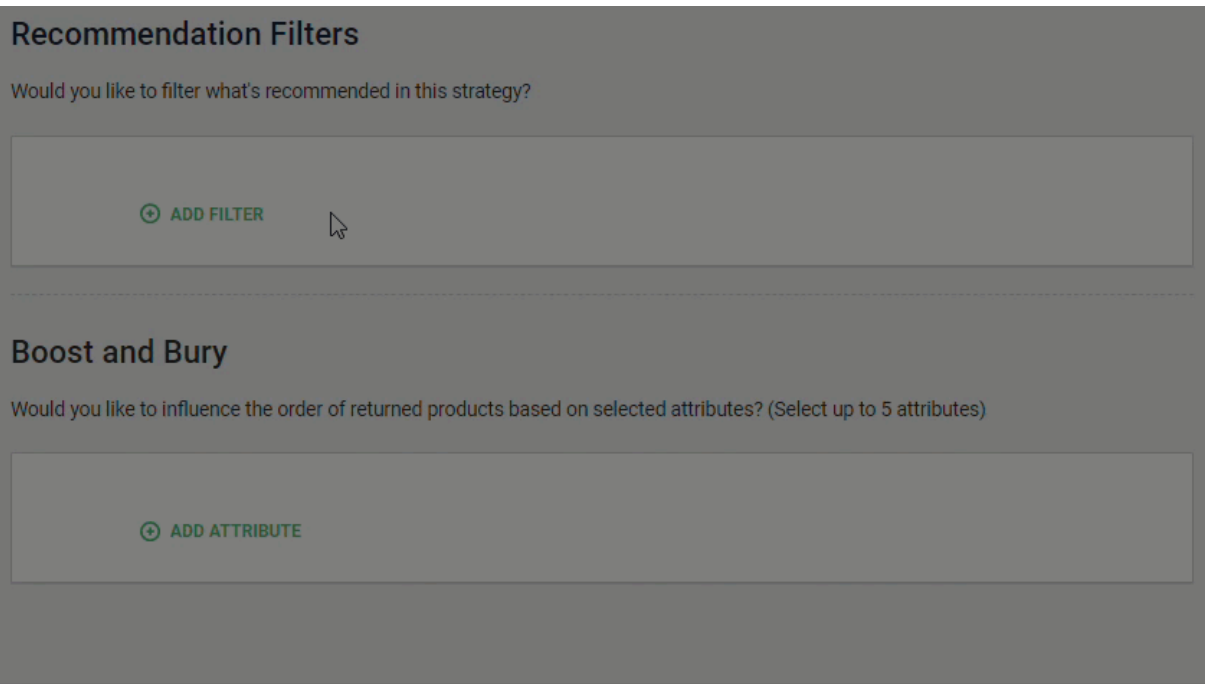
Recommendation Algorithm ⓘ Including ⓘ
TOP SELLING BY PURCHASE COUNT ▾ ONLINE AND OFFLINE PURCHASES ▾

Lookback Period ⓘ
30 DAYS ▾

Geographic Targeting ⓘ
NO TARGETING ▾

Randomize Results
III NO ←

15. To further refine the recommendations results, 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. See [Excluding Previously Purchased Products from Results](#) in this documentation if you want to ensure results don't include items the customer has already bought.



Recommendation Filters

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

⊕ ADD FILTER

Boost and Bury

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

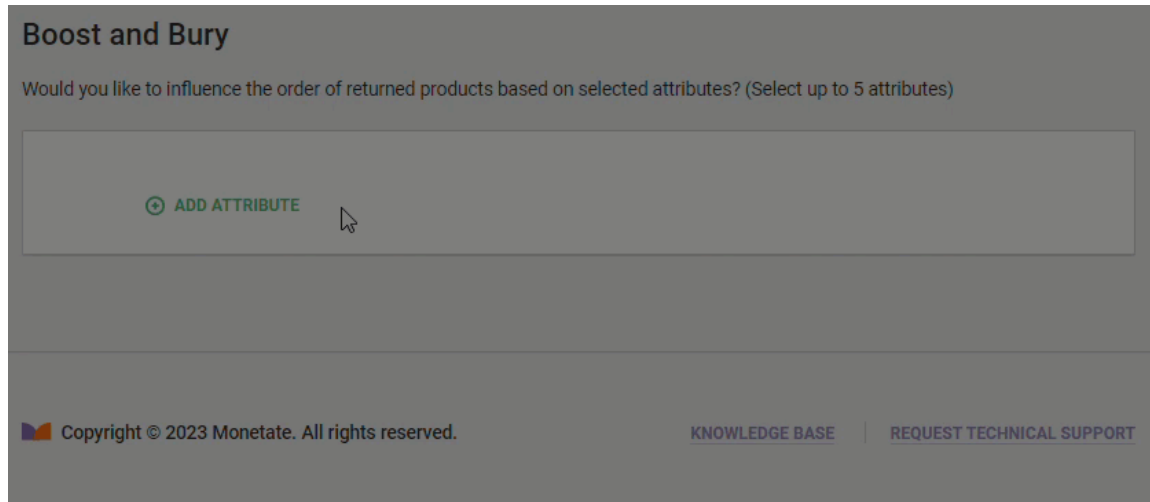
⊕ ADD ATTRIBUTE

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.

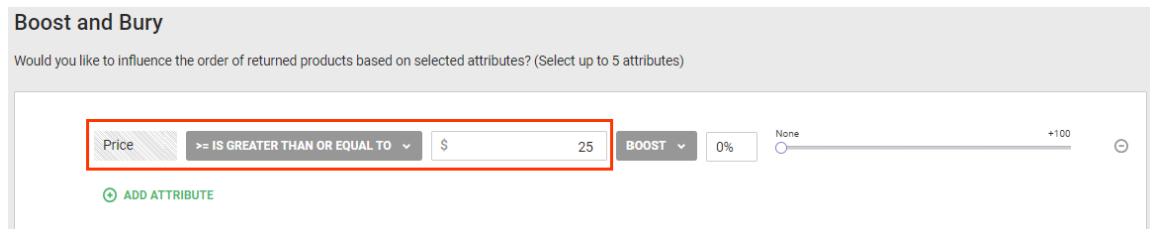


Contact your dedicated CSM if you want the Boost and Bury feature enabled.

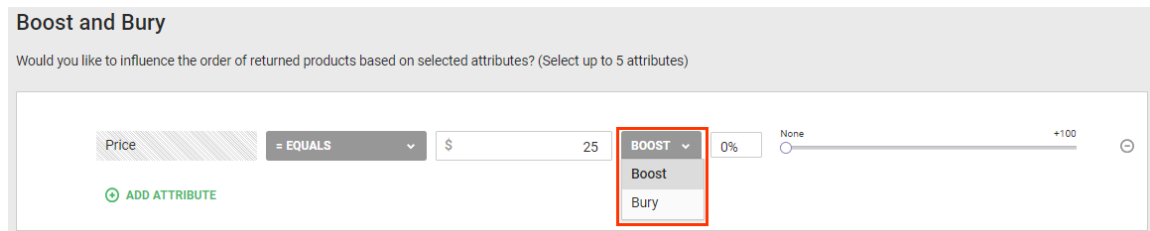
- a. Click **ADD ATTRIBUTE** and then select an attribute.



- b. Complete the filtering equation.



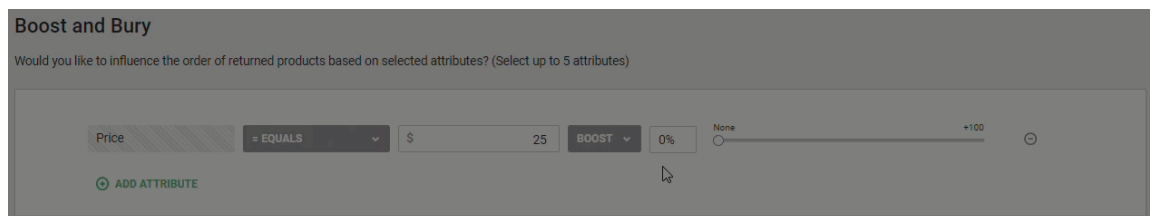
- c. Select **Boost** to promote the products that meet the filtering criteria, or select **Bury** to suppress them.



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



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.



- e. Repeat steps 15a through 15d to add up to four more independent Boost and Bury filters. See [Using Multiple Boost and Bury Filters in Create a Recommendation Strategy](#) for more information about how multiple Boost and Bury filters can impact recommendations results.

Boost and Bury


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

Quantity	< IS LESS THAN	1000	BURY	-90%	-100	None	+100
Product Type	= EQUALS (START WITH)	Start typing to filter list	BOOST	50%	None	+100	+100
Price	>= IS GREATER THAN OR EQUAL TO	\$ 59.95	BOOST	80%	None	+100	+100


[ADD ATTRIBUTE](#)

17. Click **SAVE**.

[BACK TO RECOMMENDATION STRATEGIES](#)

On- & Offline Purchases Purch & Also Purch 

[DATA COMPUTED 2 HOURS AGO](#) | Created: Jul 7, 2023 | Available to monetate.mybigcommerce.com only

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

Excluding Previously Purchased Products from Results

Follow these steps to create a recommendation filter that specifically excludes previous purchases from the recommendations results.

1. Click **ADD FILTER**, and then select either **Item Group ID (Product ID)** or **ID (SKU)** from **SELECT ATTRIBUTE**.

Recommendation Filters

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

[ADD FILTER](#)

Boost and Bury

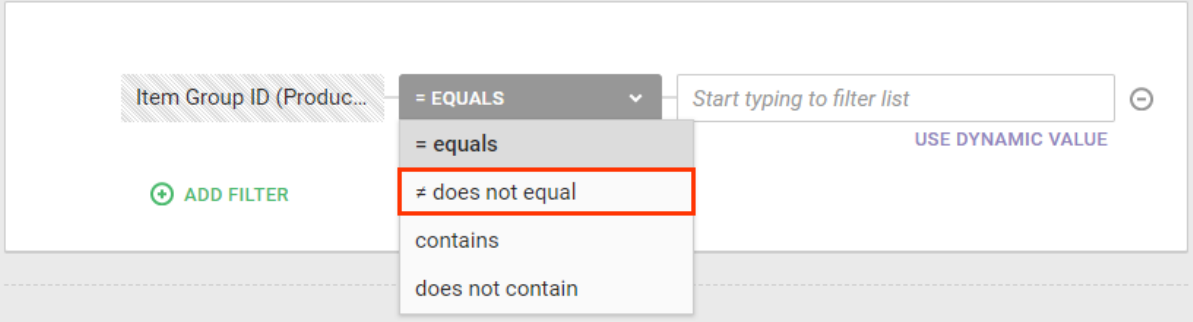
Would you like to influence the order of returned products based on selected attributes? (Select up to 5 attributes)

[ADD ATTRIBUTE](#)

2. Select **≠ does not equal** for the operator.

Recommendation Filters

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

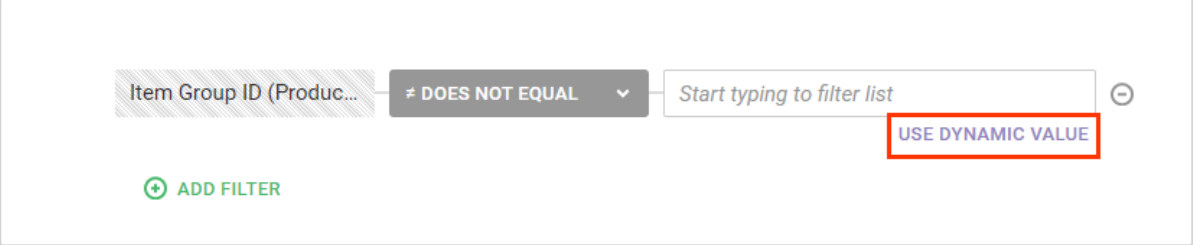


The screenshot shows a filter configuration interface. On the left, there is a field labeled "Item Group ID (Produc...". To its right is a dropdown menu currently set to "= EQUALS". A dropdown menu is open, showing several options: "= equals", "≠ does not equal" (highlighted with a red box), "contains", and "does not contain". To the right of the dropdown is a text input field with the placeholder "Start typing to filter list" and a minus sign icon. Below the input field is a blue link labeled "USE DYNAMIC VALUE". To the left of the filter configuration is a green plus icon and the text "ADD FILTER".

3. Click **USE DYNAMIC VALUE**

Recommendation Filters

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

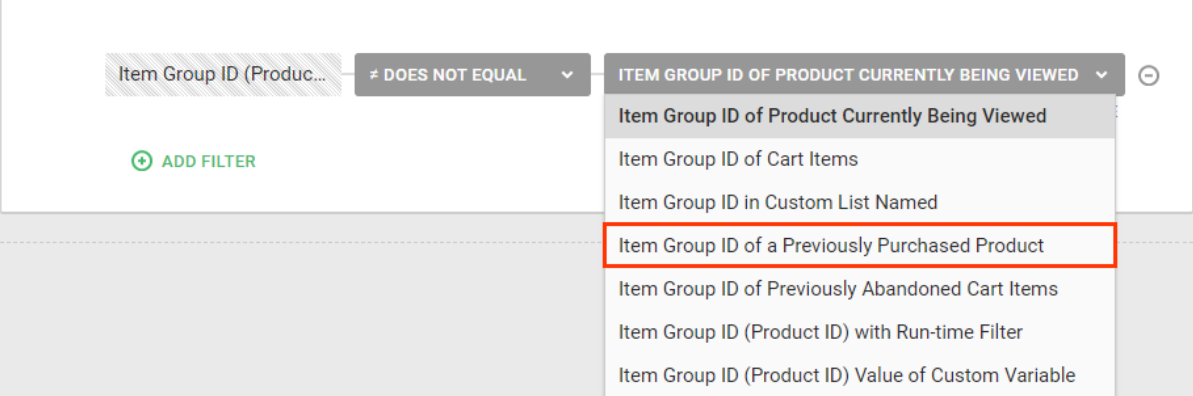


The screenshot shows the same filter configuration interface as above. The dropdown menu is now set to "≠ DOES NOT EQUAL". The blue link "USE DYNAMIC VALUE" below the text input field is now highlighted with a red box. The "ADD FILTER" button remains visible on the left.

4. Select **[attribute] of a Previously Purchased Product**.

Recommendation Filters

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



The screenshot shows the filter configuration interface. The field "Item Group ID (Produc..." is followed by a dropdown set to "≠ DOES NOT EQUAL". A second dropdown menu is open, showing a list of attributes. The attribute "Item Group ID of a Previously Purchased Product" is highlighted with a red box. Other attributes in the list include "ITEM GROUP ID OF PRODUCT CURRENTLY BEING VIEWED", "Item Group ID of Product Currently Being Viewed", "Item Group ID of Cart Items", "Item Group ID in Custom List Named", "Item Group ID of Previously Abandoned Cart Items", "Item Group ID (Product ID) with Run-time Filter", and "Item Group ID (Product ID) Value of Custom Variable". The "USE DYNAMIC VALUE" link and "ADD FILTER" button are also visible.

This filter configuration excludes from the recommendations results both products purchased online and products purchased in store that appear in the designated Offline Purchases dataset.

