Create a Product Recommendations for Email Experience

Follow these steps to create a Product Recommendations for Email experience.

> You cannot use a slotted recommendation either as one of the primary recommendations sources nor as a fallback, thus they don't appear in the lists of options for those settings.

1. Click **EXPERIENCES** in the top navigation bar, and then select **Web**.

2. Click the drop-down arrow to the right of **CREATE EXPERIENCE**, and then select **Product Recommendations for Email**.

3. Click the pencil icon, enter a name for the experience, and then click the green checkmark icon to save the name.

4. Click **WHAT** and then click **ADD ACTION**.

5. Click **Product Recommendations for Email** on the Action Type panel.

6. Click the action template that you want to use.

7. Configure the required recommendations-related inputs for the action.

   > As you configure these settings, keep in mind that if the main recommendation strategies cannot meet the minimum number of products needed to trigger the action or the maximum number of products that you want displayed, then Monetate uses each fallback strategy in their respective order, if necessary, to identify enough products to ultimately meet the maximum.

   a. Select up to four recommendation strategies to populate the recommendations.

   b. Set the number of times the action displays recommendations from one strategy before displaying recommendations from the next strategy. Refer to Setting the Recommendation Strategy Sequence in Configure a Recommendations Action with Slotting for more information.

   c. Enter into **Minimum products returned** the minimum number of recommended products that the product recommendation sources must identify for the action to fire.

> Setting the minimum to zero causes the action to fire in all scenarios, even when no products are recommended. This situation can also result in customers being counted in the experience without seeing recommendations.

> If in step 7a you selected any recommendation strategy with **Prepend context item in recommendation** enabled, then the context item counts toward meeting the threshold you set in **Minimum products returned**.

d. Set the maximum number of products the action can recommend.

> If in step 7a you selected any recommendation strategy with **Prepend context item in recommendation** enabled, then the context item counts toward meeting the threshold you set in **Maximum products returned**.

e. Optionally, enter into **Pinned products** the value of the `id` attribute for each product that you want to always appear at the beginning of the recommendations results.

> If you enter product IDs into **Pinned products** and if in step 7a you selected one or more recommendation strategies with **Prepend context item in recommendation** enabled, then the products identified at the action level appear before the context product in the recommendations results.

f. Optionally, select a product catalog attribute on which duplicate recommended products are removed from the results.

> Ensure that the attribute that you select appears in the product catalogs used in the primary and fallback recommendations sources.

8. Optionally, select up to five backup recommendation strategies that you want used to supplement the strategies that you selected in step 7a if they can't identify enough recommended products to meet the minimum that you set in step 7c or to ultimately meet the maximum that you set in step 7d.
   a. Click **ADD FALLBACK**.

   b. Select a strategy.

   c. Repeat steps 8a and 8b to add as many fallback recommendation strategies as necessary or until you reach the five strategy limit.

9. As necessary, modify the HTML code for the recommendation item template.

10. As necessary, adjust the size of the image container.

11. Click **CREATE**.
12. Click **GENERATE EMAIL HTML**.

13. Click **COPY TO CLIPBOARD**.

14. Paste the HTML into your ESP email template, and then replace the `$customer_id` placeholder and, as necessary, the placeholders for any run-time parameters in the generated HTML, with their respective values. See Preparing the Generated HTML for guidance.

Unlike Web experiences, a Product Recommendations for Email experience requires no activation because you send it to customers using your ESP.

Refer to Product Recommendations for Email Experience Analytics for more information about the results data you can view.

Previewing the Email Experience

Follow these steps to preview a Product Recommendations for Email experience complete with the context of a customer ID.

1. Click **PREVIEW** on the Experience Editor page.

2. Enter a customer ID value in the Preview modal.

> This identifier is equivalent to the one used by your ESP to identify users. If you enter a valid customer ID, then the preview represents the experience seen by that customer. If you enter an invalid or imaginary customer ID, then the preview appears as if it would for an email recipient with no history.

If the preview appears blank, a likely culprit is a syntax error in the template. Another possibility is a lack of returned recommended items due to either an empty catalog or the configurations of the recommendation strategies selected in the WHAT action.

Preparing the Generated HTML

You must make a few modifications to the HTML code that appears in the Generate Email HTML modal before you can use it.

> Modifying the link URL or the image URL beyond the ways described in this section can cause the experience to fail.

Customer ID

In each image URL and link URL, you must replace the `$customer_id` placeholder with your ESP's customer identifier. Often you can replace `$customer_id` with a subscriber merge token that dynamically resolves to the ESP identifier.

> The ESP's customer identifier must be sent to the Monetate platform as part of the Web Track process or some equivalent means.

Depending on the configuration of the recommendation strategies that you selected when creating the experience's action, the generated HTML may contain one or more pass-through parameter–value placeholder pairs. Ensure that you also replace each value placeholder with its respective attribute value(s) that you want to use in the experience.

Item Group ID Run-Time Parameter

If one of the recommendation strategies is configured with **Item group ID(s) in run-time parameter (for email)** selected for **Base Recommendation on**, then `pt_based_on_item_group_id=$runTimeFilter` appears in the generated HTML code for the email.

You must replace the `$runTimeFilter` placeholder with at least one and no more than five `item_group_id` values that you pass to Monetate.

> The `item_group_id` value(s) that you use must be in the product catalog associated with each recommendation strategy that is configured with the **Item group ID(s) in run-time parameter (for email)** setting that you selected when configuring the experience's action. This requirement applies to the recommendation strategies you selected for recommendation strategies A through D in the action template as well as for the optional fallback recommendation strategies. Otherwise, no results will be returned.

If you use multiple values, ensure they're in a properly formed string with each comma replaced with `%2C`.

Recommendation Run-Time Filters

If you selected one or more recommendation strategies configured with one or more run-time filters, then you must replace the placeholder for each run-time filter parameter (for example, `pt_brand=$runTimeFilter`) with a value for that attribute that you pass to Monetate.

You cannot use multiple attribute values with a recommendation run-time filter.

Other Query String Parameters

You can configure a Product Recommendations for Email experience so that you can track page visits and product purchases that result from it by adding a query string parameter for tracking purposes to the generated HTML.

Add the query string parameter at the end of each image URL and link URL in the generated HTML.

When the email recipient clicks a link in the message, they're redirected to its corresponding page on your site as expected, with the query string parameter that you'd added preserved.