

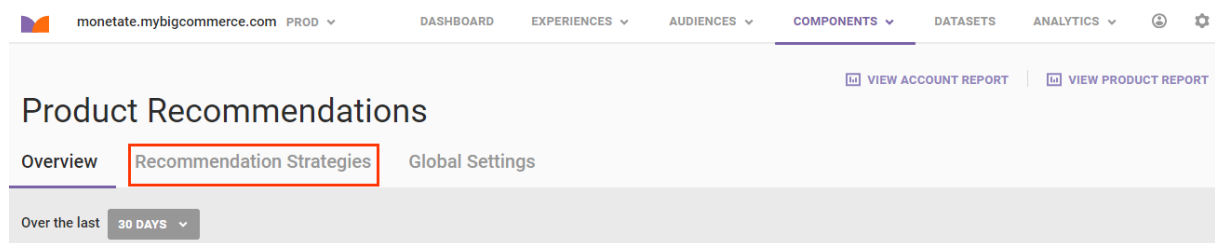
Create a Recommendation Strategy with a Recommendations Dataset

Follow these steps to create a recommendation strategy that uses a Recommendations dataset.

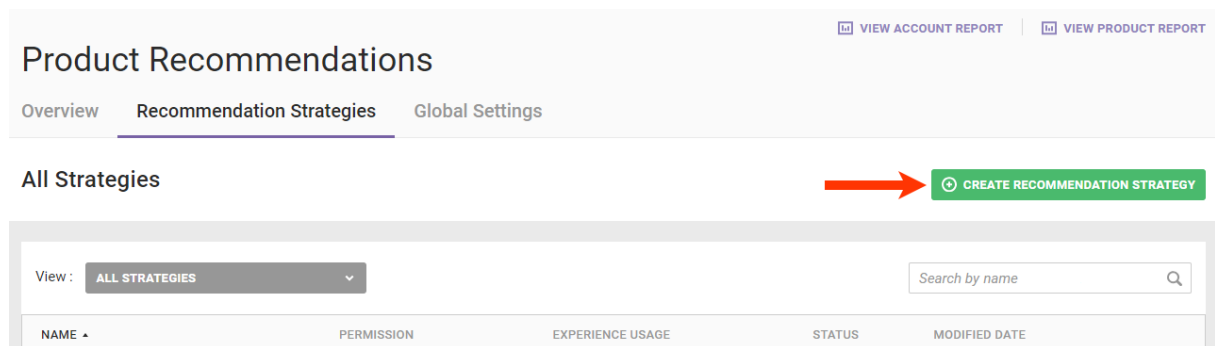


See the [Recommendations Datasets](#) category of the knowledge base for dataset specifications and steps to upload one to the Monetate platform.

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 ...


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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 **Onboarded Recommendation Dataset** from **Recommendation Algorithm**.

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 ▲

- Items Frequently Bought Together
- Trending Items by Purchase Count
- Similar Items
- Searched and Also Purchased
- Engagement Optimized
- Replenishment
- Most Popular
- Subsequently Purchased

CLIENT MANAGED

Onboarded Recommendation Dataset

7. Select the dataset you want to use from **Recommendation Dataset**.

Recommendation Type [View Associated Experiences](#)

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

Product Catalog ⓘ

CK_PRODUCTS (DEFAULT) ▾

Recommendation Algorithm ⓘ

ONBOARDED RECOMMENDATION DATASET ▾

Recommendation Dataset

PLEASE SELECT A DATASET ▾

8. Select from **Base Recommendation on** the type of customer behavior or other context on which to base the recommendations.




If you're creating the recommendation strategy to use in a [Product Recommendations for Email experience](#), then you can select only **No Lookup Key – Show All Items in Dataset** or **Item group ID(s) in run-time parameter (for email)**. The latter option allows you to use up to five item group ID values in the Product Recommendations for Email experience. See [Preparing the Generated HTML in Run-Time Context for Recommendations Email Experiences](#).

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. This option isn't compatible

with Product Recommendations for 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 ⓘ
ONBOARDED RECOMMENDATION DATASET ▾

Recommendation Dataset
CK_REC ▾

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 group ID(s) in custom variable** in [step 8](#), 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 ⓘ

ONBOARDED RECOMMENDATION DATASET ▼

Recommendation Dataset

CK_REC ▼

Base Recommendation on ⓘ

ITEM GROUP ID(S) IN CUSTOM VARIABLE ▼

Pin products in custom variable to front of recommendation results.

Custom Variable ⓘ

Start typing and press Enter

Randomize Results

NO

- 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.



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 ⓘ

ONBOARDED RECOMMENDATION DATASET ▼

Recommendation Dataset

CK_REC ▼

Base Recommendation on ⓘ

ITEM GROUP ID(S) IN CUSTOM VARIABLE ▼

Pin products in custom variable to front of recommendation results.

Custom Variable ⓘ

Start typing and press Enter

←

Randomize Results

NO

10. 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 ⓘ

ONBOARDED RECOMMENDATION DATASET ▼

Recommendation Dataset

CK_REC ▼

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

Randomize Results

NO

- 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 ⓘ

ONBOARDED RECOMMENDATION DATASET ▼

Recommendation Dataset

CK_REC ▼

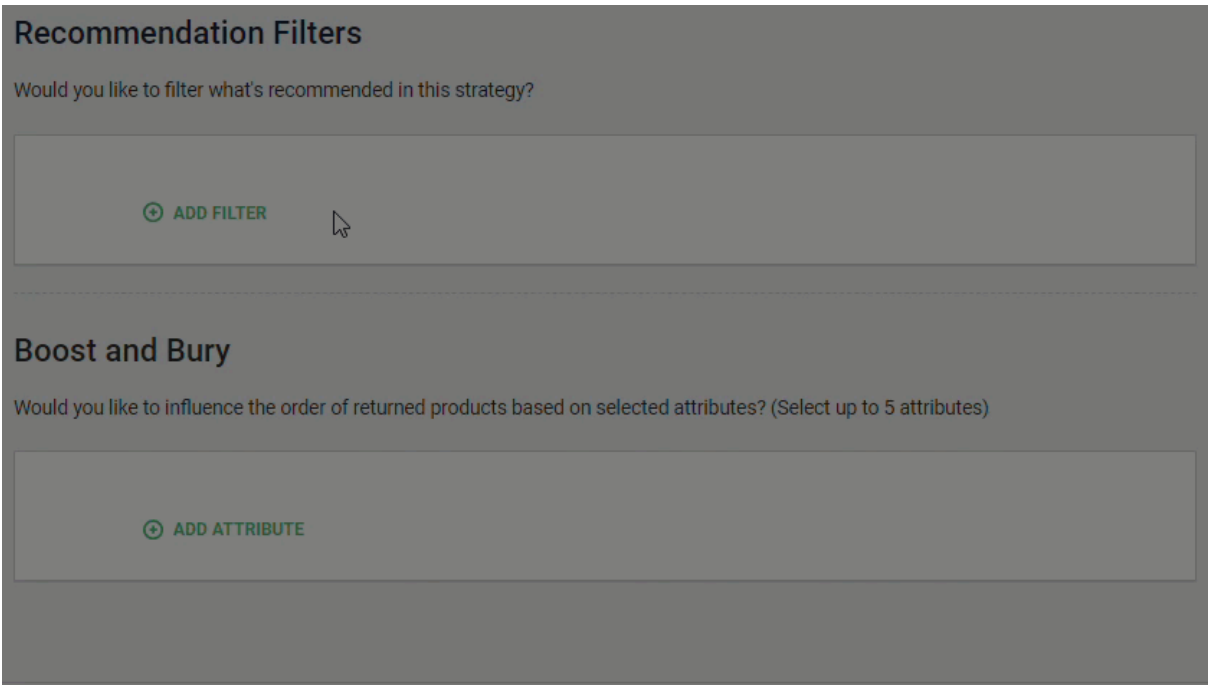
Base Recommendation on ⓘ

ITEM(S) VIEWED IN PAST SESSIONS ▼

Randomize Results

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](#).

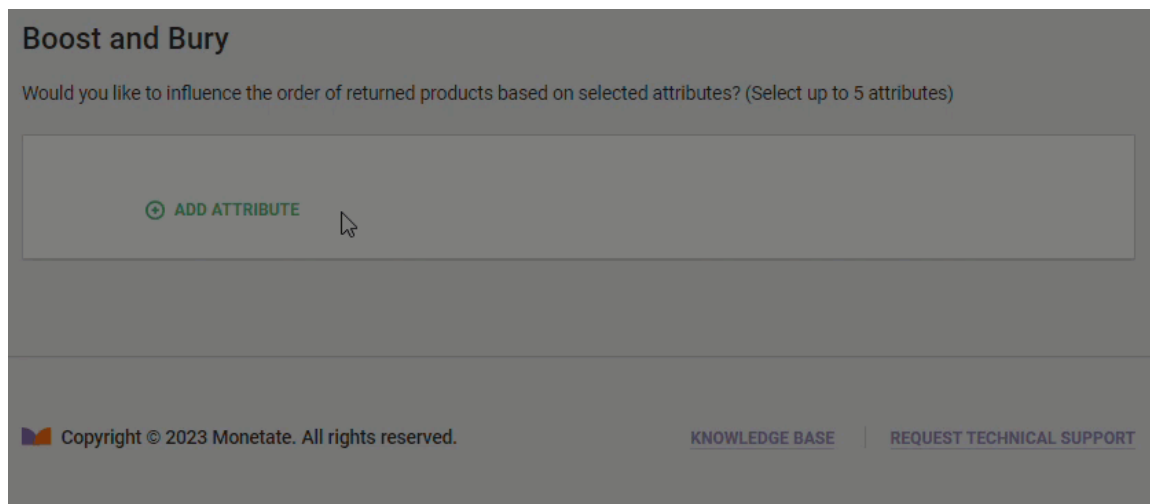


13. Optionally, configure up to five Boost and Bury filters to influence if recommended products that meet that filtering criteria are more likely (boost) or less likely (bury) to appear for the customer.



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

[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

[ADD ATTRIBUTE](#)

- 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.

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

[ADD ATTRIBUTE](#)

- e. Repeat steps 13a through 13d to add up to four more independent Boost and Bury filters. See [Using Multiple Boost and Bury Filters in Create a Recommendation Strategy](#) 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

Product Type **BOOST** None


Price \$ **BOOST** None

[ADD ATTRIBUTE](#)

14. Click **SAVE**.

[← BACK TO RECOMMENDATION STRATEGIES](#)

CK Products Recs Dataset

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SAVE

CANCEL



Recommendation Type

[View Associated Experiences](#)

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