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**.

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

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

9. 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.

10. If you selected **Item group ID(s) in custom variable** in step 8, 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.

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

12. 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. See Boost and Bury
    for more information.

14. 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.