Create a Recommendation Strategy with a Recommendations Dataset

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

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.

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. 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.
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.

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.
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.

   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.
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 it. Furthermore, you can only adjust the percentage in increments of 10.**

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.

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.