

Delete a Recommendation Strategy



You cannot restore a recommendation strategy that you delete. You can only recreate its configurations in a new strategy.

You can delete a recommendation strategy if it meets one or more of these criteria:

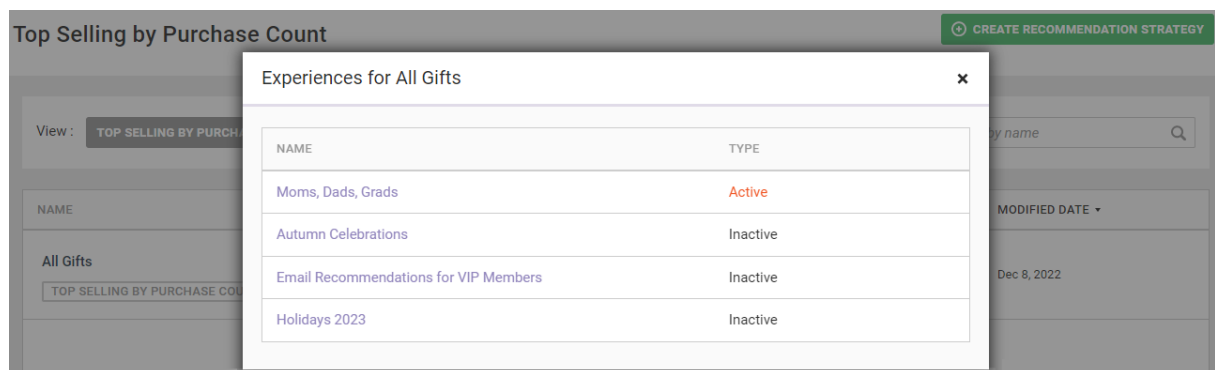
- Isn't used in any recommendations actions in any experiences whatsoever
- Is used in one or more recommendations actions in experience drafts or paused experiences, either as a main strategy or as a fallback strategy
- Is part of an unused or inactive [slotted recommendation](#)
- Is part of one or more Product Finder questionnaires that are used in experiences drafts or paused experiences
- Is part of any unused Product Finder questionnaires

You *cannot* delete a recommendation strategy that's part of an active experience, regardless of its use as a main strategy, as a fallback strategy, or as part of a slotted recommendation.

Determining How a Strategy Is Used

A recommendation strategy's [Experiences modal](#) shows you if the strategy is part of an experience when it's being used as a main recommendation strategy or as a fallback strategy. Access this modal in two places in the Monetate platform:

- By clicking the USAGE column value that appears for the strategy on the [Recommendation Strategies list page](#)



- By clicking **View Associated Experiences** on the recommendation strategy's configuration page

< BACK TO RECOMMENDATION STRATEGIES

Father's Day Promo


Created: May 25, 2024 | Available to monetate.mybigcommerce.com only


SAVE CANCEL ...

Recommendation Type


View Associated Experiences

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




Product Catalog 


CK_PRODUCTS (DEFAULT) ▾

Recommendation Algorithm 

VIEWED AND LATER PURCHASED ▾

Base Recommendation on 

FIRST ITEM VIEWED ON CURRENT PAGE ▾

Lookback Period 

30 DAYS ▾



The modals *do not* include active and inactive experiences configured with a slotted recommendation that uses the strategy.

If the recommendation strategy is part of an experience, you can click the experience's name to open it in Experience Editor.

Understanding the Experience Status Reported

The **Active** status in the Experiences modal's TYPE column indicates one of the following states:

- The experience is active
- The experience has a scheduled start date and time
- The experience's scheduled end time has passed

If you see the **Active** status in the Experiences modal, then you cannot delete the recommendation strategy.

The **Inactive** status in the modal's TYPE column indicates one of the following states:

- The experience is a draft
- The experience is paused
- The experience is archived

Because the Experiences modal only provides the name and status of the experiences that use the recommendation strategy, you must open an experience in Experience Editor to determine if the recommendation strategy is part of a recommendations action as a main strategy or a fallback strategy, or if it's part of a Product Finder action.



A recommendation strategy's Experiences modal *does not* include active and inactive experiences

configured with a slotted recommendation that uses the recommendation strategy that you want to delete. The only way to determine if a recommendation strategy is part of a slotted recommendation is to open each slotted recommendation's configuration page.

The **Unused** status appears in the modal's TYPE column only if the recommendation strategy meets these criteria:

- The strategy isn't used in any experiences as a main strategy or as a fallback strategy in a recommendations action
- The strategy isn't used as part of a Product Finder action in an experience

The limited criteria for this status can result in the following "false negative" scenarios:

- The **Unused** status appears even though the recommendation strategy is part of one or more slotted recommendations, regardless of an associated [slotted recommendation's status](#).
- The **Unused** status appears even though the recommendation strategy is part of one or more unused Product Finder questionnaires.

See [Finding Strategies in Unused Product Finder Questionnaires](#) in this documentation for the steps to eliminate the second of these two "false negative" scenarios.

Potential Consequences of Deleting a Strategy

If you delete a recommendation strategy that's used as a main strategy or as a fallback strategy in any inactive experiences configured with a recommendations action, then the recommendation strategy selector once configured with the now-deleted strategy reverts to its **SELECT PRODUCT RECOMMENDATION** state or **SELECT FALLBACK** state, respectively.




The deleted recommendation strategy's name still appears in an inactive Web experience's Recommendation Strategy Report.

If you delete a recommendation strategy that's used in a Product Finder questionnaire, then the recommendation strategy selector in the Product Finder wizard that was once configured with the now-deleted strategy reverts to its **SELECT RECOMMENDATION STRATEGY** state.

Deleting a recommendation strategy that's used in a slotted recommendation impacts the slotted recommendation as follows:

- The recommendation strategy selector that was once configured with the now-deleted strategy on the slotted recommendation configuration page reverts to its **SELECT RECOMMENDATION STRATEGY** state.
- Each slot position that had been assigned to the now-deleted strategy remains assigned to the now-blank recommendation strategy selector.

[BACK TO SLOTTED RECOMMENDATIONS](#)

Spring Cleaning 

Created: Feb 11, 2025 | Available to all monetatebc accounts

SAVE CANCEL ...

Configure the slotted recommendation [View Associated Experiences](#)

Select the recommendation strategies and slot positions for each selected strategy.

Choose at least one strategy to populate this recommendation.

Recommendation strategies

A

SOAPS, DISINFECTANTS & RELATED SUPPLIES

B

SELECT RECOMMENDATION STRATEGY

C

GARDEN/LAWN TOOLS

D

BROAD VIEWED AND ALSO VIEWED

Slot Position

A

B

C

A

B

C

A

A

B

B

C

C

A

C

A

B

A

B

C

D

[CLEAR](#)

Click a slot to assign a recommendation strategy. At least one assigned slot is required. The number of assigned slots will equal the maximum number of products this strategy will display.



The deleted recommendation strategy's name still appears in an inactive experience's Recommendation Strategy Report.

Finding Strategies in Unused Product Finder Questionnaires

To determine if a recommendation strategy that you want to delete is part of any unused Product Finder questionnaires, navigate to the [Product Finder list page](#), and then use your browser's search tool to look for the strategy's name on the list page.

If you delete a recommendation strategy that's in an unused Product Finder questionnaire without first replacing it with a different strategy, the now-deleted recommendation strategy's name still appears in the RECOMMENDATION STRATEGY column on the Product Finder list page. However, the recommendation strategy selector once configured with the now-deleted strategy reverts to its **SELECT RECOMMENDATION STRATEGY** state in the Product Finder wizard.



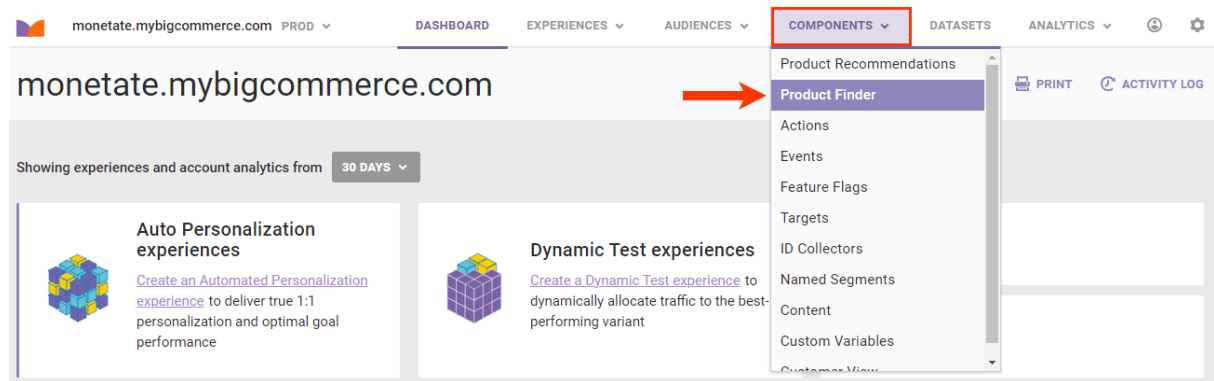
Because the Experiences modals and the Delete modal don't indicate if a recommendation strategy is part of any unused Product Finder questionnaires, you shouldn't delete a recommendation strategy until you first check the Product Finder list page to determine if the strategy that you want to delete is part of any unused Product Finder questionnaires.

If the strategy is part of an unused Product Finder questionnaire, then follow these steps to replace it.

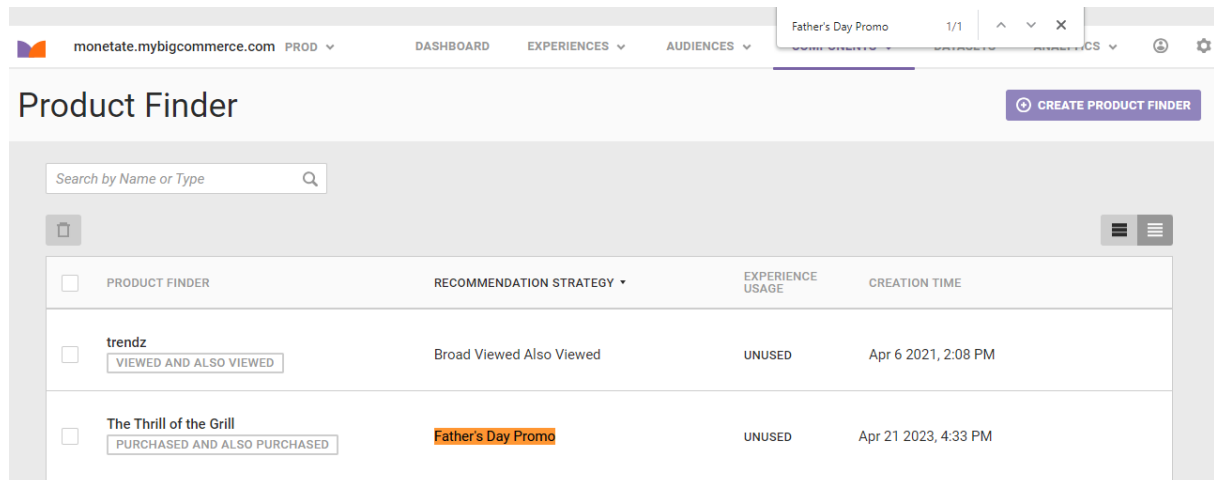


If the strategy is part of a Product Finder questionnaire associated with an active Web experience, then you cannot delete it.

1. Click **COMPONENTS** in the top navigation bar and then select **Product Finder**.



2. Use your browser's search tool to find on the Product Finder list page any occurrences of the recommendation strategy that you want to delete.
 - If the search tool doesn't find the strategy name, then skip to [Deleting a Strategy That's Unused or in Inactive Experiences](#) or to [Deleting a Recommendation Strategy in an Active Experience](#), as appropriate.
 - If the search tool finds the strategy name associated with one or more unused Product Finder questionnaires, then continue to step 3.
 - If the search tool finds the strategy name associated with a Product Finder questionnaire used in one or more active or inactive Web experiences, then skip to [Deleting a Recommendation Strategy in a Product Finder Experience](#).



3. Click the name of the questionnaire to open it in the Product Finder wizard.

Product Finder

CREATE PRODUCT FINDER

Search by Name or Type

PRODUCT FINDER	RECOMMENDATION STRATEGY	EXPERIENCE USAGE	CREATION TIME
<input type="checkbox"/> trendz VIEWED AND ALSO VIEWED	Broad Viewed Also Viewed	UNUSED	Apr 6 2021, 2:08 PM
<input type="checkbox"/> The Thrill of the Grill PURCHASED AND ALSO PURCHASED	Father's Day Promo	UNUSED	Apr 21 2023, 4:33 PM

4. Select a different recommendation strategy.

The Thrill of the Grill

Name your Product Finder

The Thrill of the Grill

Add a unique name containing between 4 and 64 characters.
Name may not include special characters (` # ^ + = [] { } \ | < > / ? ~).

Select Recommendation Strategy

Your guided questionnaire will deliver filtered results based on the selected recommendation strategy.

FATHER'S DAY PROMO

When do you want results returned?

Results can be displayed at every step or when the user concludes the questionnaire.

☐ Return results after each question
 ☒ Return results when the user concludes the questionnaire

List any custom catalog fields you'd like returned to the client.

Provide a comma-separated list of any custom field you'd like returned. These can be any field in your catalog.

CANCEL

NEXT: BEGIN QUESTIONNAIRE

> The Thrill of the Grill

> What type of fuel do you want to use?

> Will you need to transport it?

> How much cooking space do you want?

> How much do you want to spend on the grill?

5. Click **UPDATE** in the Changing Recommendation Strategy modal.

The Thrill of the Grill

Name your Product Finder

The Thrill of the Grill

Add a unique name containing between 4 and 64 characters.
Name may not include special characters (`" # ^ + = [] { } \ | < > / ? ~ .`).

Select Recommendation Strategy

Your guided questionnaire will deliver filtered results based on the selected recommendation strategy.

FATHER'S DAY PROMO

When do you want results returned?

Results can be displayed at every step or when the user concludes the questionnaire.

☐ Return results after each question

List any custom catalog fields you'd like returned to the client.

Provide a comma-separated list of any custom field you'd like returned. These can be any field in your catalog.

CANCEL

NEXT: BEGIN QUESTIONNAIRE

Changing Recommendation Strategy

By changing the recommendation strategy to **Outdoor Living**, you may also be changing the associated dataset. As a result, you may have to update the filters applied to answers after the strategy is updated.

UPDATE CANCEL

6. Click **NEXT: BEGIN QUESTIONNAIRE**.

The Thrill of the Grill

Name your Product Finder

The Thrill of the Grill

Add a unique name containing between 4 and 64 characters.
Name may not include special characters (`" # ^ + = [] { } \ | < > / ? ~ .`).

Select Recommendation Strategy

Your guided questionnaire will deliver filtered results based on the selected recommendation strategy.

OUTDOOR LIVING

When do you want results returned?

Results can be displayed at every step or when the user concludes the questionnaire.

☐ Return results after each question ☒ Return results when the user concludes the questionnaire

List any custom catalog fields you'd like returned to the client.

Provide a comma-separated list of any custom field you'd like returned. These can be any field in your catalog.

CANCEL

NEXT: BEGIN QUESTIONNAIRE

> The Thrill of the Grill

> What type of fuel do you want to use?

> Will you need to transport it?

> How much cooking space do you want?

> How much do you want to spend on the grill?

7. If necessary, take any of these actions:

- Modify any of the questions, their **filters**, and their **images**.
- Click **PREVIEW** to ensure that the questionnaire works with the replacement recommendation strategy.

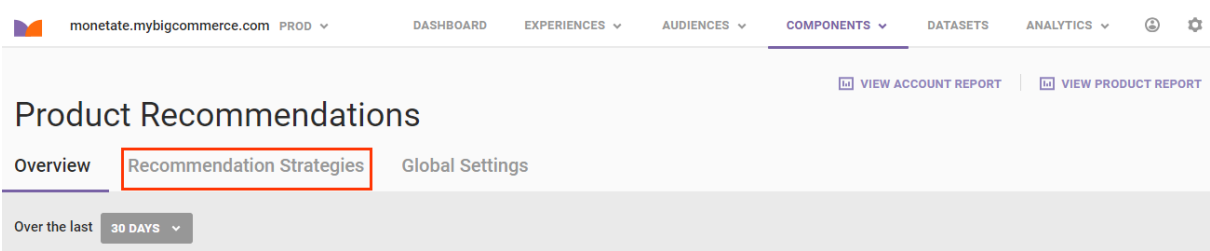
8. Click the X in the upper-right corner of the wizard to save the changes if you skipped the previous step, or click **EXIT** after you finish previewing the questionnaire.

You can now delete the recommendation strategy without impacting the unused Product Finder questionnaire.

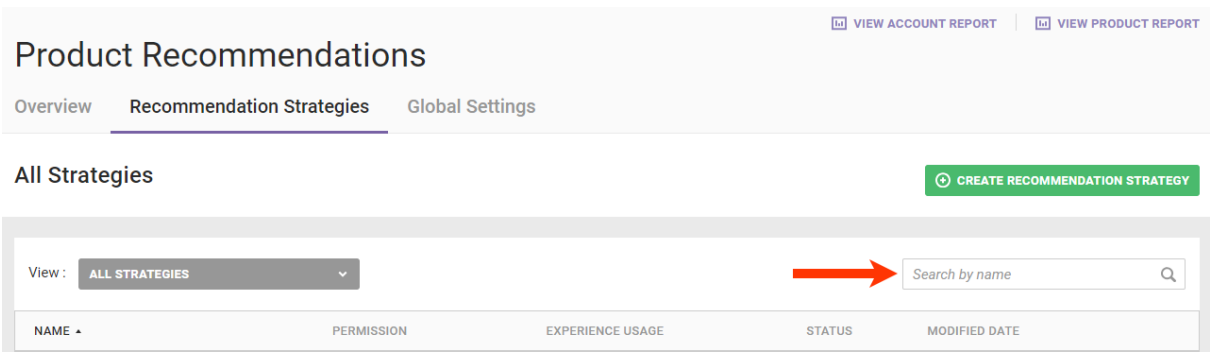
Deleting a Strategy That's Unused or in Inactive Experiences

Follow these steps to delete a recommendation strategy that's not used in any Product Finder questionnaires or Web experiences or is part of inactive Web experiences.

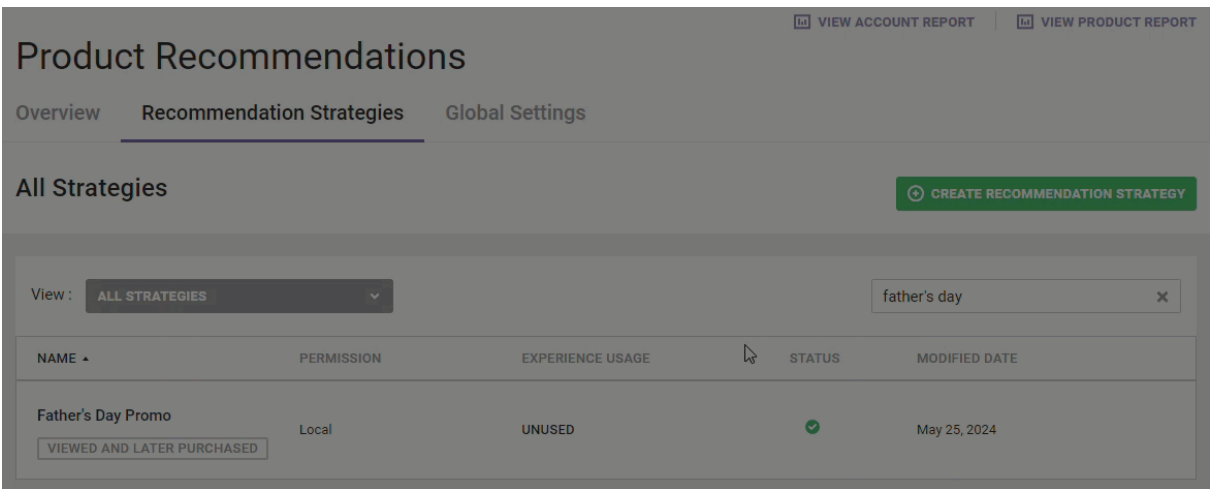
1. Click **COMPONENTS** in the top navigation bar, select **Product Recommendations**, and then click the **Recommendation Strategies** tab.



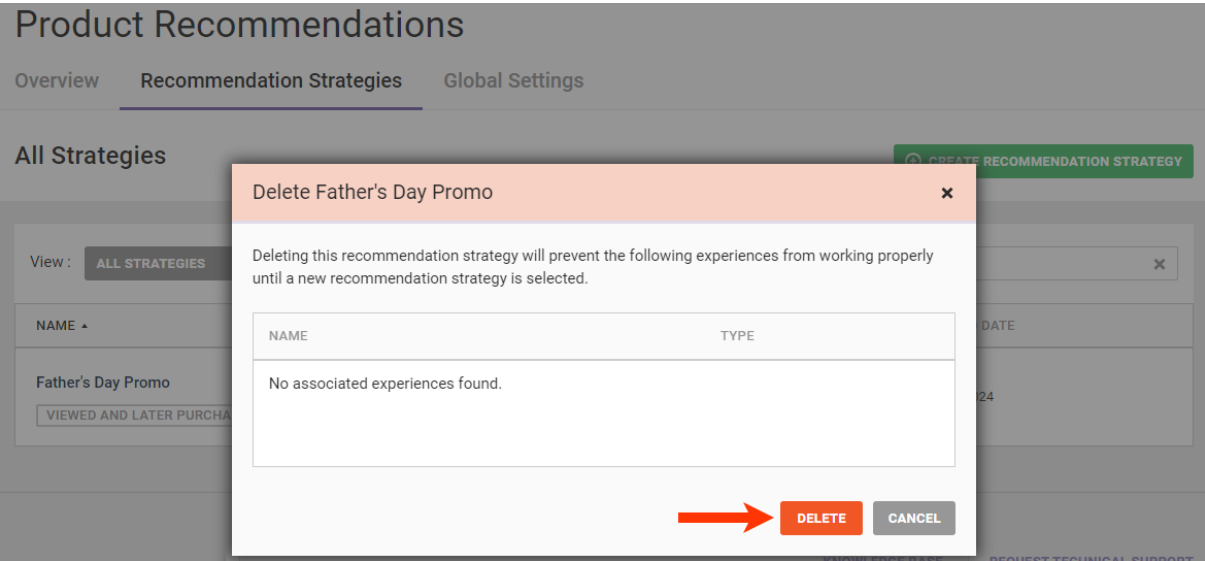
2. Use the search bar on the Recommendation Strategies list page to find the recommendation strategy that you want to delete.



3. Place your mouse pointer anywhere in the strategy's table row, and then click the delete icon when it appears.



4. Click **DELETE** in the Delete modal.



The Recommendation Strategies list page loads, and a message confirming that the strategy was successfully deleted briefly appears.