Create a Bundle

Contact your dedicated Customer Success Manager (CSM) if you want to add the Monetate Dynamic Bundles feature to your account.

Follow the appropriate steps to create either a global bundle, which is available in all your accounts, or a local bundle, which is available only in the account you're currently in.

Creating a Global Bundle

Follow these steps to create a bundle that's available in all your accounts.

1. Click COMPONENTS in the top navigation bar, select Product Recommendations, and then click the Dynamic Bundles tab.

2. Click CREATE A BUNDLE.

3. Select the option on the Recommendation Permission modal to make the bundle global, and then click CONTINUE.

You cannot change the permission after you click CONTINUE.
4. Name the bundle. Click the placeholder title, type the name into the text field, and then click the green checkmark.

5. Select one of the following options from Recommendation algorithm:
   - **Purchased and Also Purchased** — Populates with products from the account's default product catalog that other customers most frequently purchased along with the product(s) that meet the criteria that you select from **Base Recommendation on** when configuring the bundle.
   - **Viewed and Also Viewed** — Populates with products from the account's default product catalog most frequently viewed after viewing the product(s) that meet the criteria that you select from **Base Recommendation on** when configuring the bundle.
   - **Viewed and Later Purchased** — Populates with products from the account's default product catalog most frequently purchased by customers who viewed the product(s) that meet the criteria that you select from **Base Recommendation on** when configuring the bundle.
   - **Items Frequently Bought Together** — Populates with the second-most–purchased items based on the Purchased and Also Purchased rankings, with purchases counted across sessions.
   - **Subsequently Purchased** — Populates with products that other customers purchased after they bought the product(s) that meet the criteria you select from **Base Recommendation on** when configuring the bundle, and taking into account the order in which those other products were purchased.
6. If your Monetate implementation has at least one market set up and you selected either Purchased and Also Purchased or Viewed and Also Viewed in the previous step, then take the following actions:

   a. Select the source of the data that the algorithm considers.
      - **[current account] only** — The algorithm considers only data from the account in which you’re creating the bundle
      - **All [retailer] accounts** — The algorithm considers data from all accounts within your Monetate implementation
      - **Specific Market** — The algorithm considers data from the market you select

   b. If you selected Specific Market in step 6a, then choose an option from Select a Market.
7. If you selected **Purchased and Also Purchased** in step 5 and if Offline Purchases Data is set as the default on the **Global Settings** tab, then select **Online purchases only, Offline purchases only, or Online and offline purchases** from **Including**.

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

If you select **Item group ID(s) in custom variable**, which allows you to base recommendations on the **item_group_id** value(s) in a custom variable passed at run time, be aware that the first **item_group_id** value of the custom variable that you input into **Custom Variable** in step 10b is used as the context item for the bundle instead of the product the customer is viewing.
9. If you selected **Item(s) purchased in previous sessions** or **Last item purchased in any session** in step 8 and if Offline Purchases Data is set as the default on the Global Settings tab, then select an option from Data Includes:
   - **Online purchases only** — Offline purchases aren’t included in the customer purchase history
   - **Online and offline purchases** — offline purchases along with online purchases are included in the customer purchase history
10. 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 in the Dynamic Bundles slider before the products derived from the bundle's product categories.

   b. Type into **Custom Variable** a custom variable that your sitepassed 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. Select from **Lookback Period** how much historical data should be considered when determining the recommended products.

12. Leave **Randomize Results** set to NO.
Configure at least two and no more than six product categories, and then, as necessary, arrange their order. See Configuring Product Categories for more information.

As necessary, configure one or more filters to further refine the products included in the bundle. Click ADD FILTER, select an option from SELECT ATTRIBUTE, and then complete the filter equation. Repeat this step as necessary to add as many filters as you believe the bundle needs. For more information see Filter Best Practices for Bundles as well as Filters in Recommendations.
Creating a Local Bundle

Follow these steps to create a bundle that's available only in the account you're viewing.

1. Click COMPONENTS in the top navigation bar, select Product Recommendations, and then click the Dynamic Bundles tab.

2. Click CREATE A BUNDLE.
3. Select the option on the Recommendation Permission modal to make the bundle local, and then click CONTINUE.

You cannot change the permission after you click CONTINUE.

4. Name the bundle. Click the placeholder title, type the name into the text field, and then click the green checkmark.

5. Optionally, select a Recommendations dataset that you previously uploaded that contains the curated product collection that you want to use in the bundle.
If the account has multiple product catalogs, select the one you want to use.

Select one of the following options from Recommendation algorithm:

- **Purchased and Also Purchased** — Populates with products from the account's default product catalog that other customers most frequently purchased along with the product(s) that meet the criteria that you select from Base Recommendation on when configuring the bundle
- **Viewed and Also Viewed** — Populates with products from the account's default product catalog most frequently viewed after viewing the product(s) that meet the criteria that you select from Base Recommendation on when configuring the bundle
- **Viewed and Later Purchased** — Populates with products from the account's default product catalog most frequently purchased by customers who viewed the product(s) that meet the criteria that you select from Base Recommendation on when configuring the bundle
- **Items Frequently Bought Together** — Populates with the second-most–purchased items based on the Purchased and Also Purchased rankings, with purchases counted across sessions
- **Subsequently Purchased** — Populates with products that other customers purchased after they bought the product(s) that meet the criteria you select from Base Recommendation on when configuring the bundle, and taking into account the order in which those other products were purchased
8. If your Monetate implementation has at least one market set up and you selected either Purchased and Also Purchased or Viewed and Also Viewed in the previous step, then take the following actions:
   a. Select the source of the data that the algorithm considers.
      - [current account] only — The algorithm considers only data from the account in which you’re creating the bundle
      - All [retailer] accounts — The algorithm considers data from all accounts within your Monetate implementation
      - Specific Market — The algorithm considers data from the market you select

   b. If you selected Specific Market in step 8a, then choose an option from Select a Market.
9. If you selected Purchased and Also Purchased in step 7 and if Offline Purchases Data is set as the default on the Global Settings tab, then select Online purchases only, Offline purchases only, or Online and offline purchases from Including.

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

If you select Item group ID(s) in custom variable, which allows you to base recommendations on the item_group_id value(s) in a custom variable passed at run time, be aware that the first item_group_id value of the custom variable that you input into Custom Variable in step 12b is used as the context item for the bundle instead of the product the customer is viewing.
11. If you selected Item(s) purchased in previous sessions or Last item purchased in any session in step 10 and if Offline Purchases Data is set as the default on the Global Settings tab, then select an option from Data Includes:
   - **Online purchases only** — Offline purchases aren’t included in the customer purchase history
   - **Online and offline purchases** — Offline purchases along with online purchases are included in the customer purchase history
12. If you selected **Item group ID(s) in custom variable** in step 10, 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 in the Dynamic Bundles slider before the products derived from the bundle's product categories.

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
13. Select from **Lookback Period** how much historical data should be considered when determining the recommended products.

14. Leave **Randomize Results** set to **NO**.
15. Configure at least two and no more than six product categories, and then, as necessary, arrange their order. See Configuring Product Categories for more information.

16. As necessary, configure one or more filters to further refine the products included in the bundle. Click ADD FILTER, select an option from SELECT ATTRIBUTE, and then complete the filter equation. Repeat this step as necessary to add as many filters as you believe the bundle needs. For more information see Filter Best Practices for Bundles in this documentation as well as Filters in Recommendations.
Configuring Product Categories

A Dynamic Bundles slider can contain no fewer than two products and no more than six. Each product category that you configure in a bundle returns one item.

Furthermore, the order of the product categories that you configure in the bundle defines the order in which the products appear in the slider. When configuring a bundle, you can rearrange the order of the product categories that you include.

Follow these steps to configure a product category.

1. Name the category. Click the pencil icon, type the category's name, and then click the green checkmark.

17. Click **SAVE**.
2. Add a filter based on a product catalog attribute.
   a. Click **ADD FILTER** and then select an attribute.

   b. Select the operator.

   c. Either input one or more static values, or click **USE DYNAMIC VALUE** and then select an option. See [Static and Dynamic Values](#) in **Filters in Recommendations** for more information.
d. As necessary, repeat steps 2a through 2c to add additional filters to the product category.

Filters in a product category can only be combined using AND logic.

3. Repeat steps 1 and 2 to create at least one more product category and no more than six total product categories.

4. As necessary, drag and drop each product category to rearrange their order.
Filter Best Practices for Bundles

Keep in mind this guidance when creating not only product category filters but also bundle-level filters:

- Don’t use any dynamic value option other than `<attribute> of Product That Recommendation Is Based On`.
- If you want to filter based on viewed products or carted products to cover more of the products in the catalog, then select one of the options from the VIEWED or CARTED categories of Base Recommendation on, and then use the `<attribute> of Product That Recommendation Is Based On` dynamic value option in a filter.
No matter if they're set on the **Global Settings** tab of the Product Recommendations page, at the bundle level, or at the product category level, filters that have static values are all applied simultaneously. So too is a filter with the `<attribute> of Product That Recommendation Is Based On` dynamic value option.

Contact your dedicated Customer Success Manager (CSM) if you need assistance creating filters that meet your goals.