# Product Recommendations Reports

You can access three global reports and four experience-level reports, all with specific filters applied, within Monetate. They help you better understand how recommendations are performing at the account level and experience level.

> ⚠️ Do not use tabbed browsing across multiple accounts when looking at these reports. You may experience data issues.

See Product Recommendations Reports Terminology for definitions of various report metrics.

Global Reports

The three global reports offer a high-level view of how recommendations are performing. Access the Recommendation Account Report, the Recommendation Experience Report (All), and the Recommendation Product Report by selecting **Global Recommendations Reports** from **ANALYTICS** in the top navigation bar.
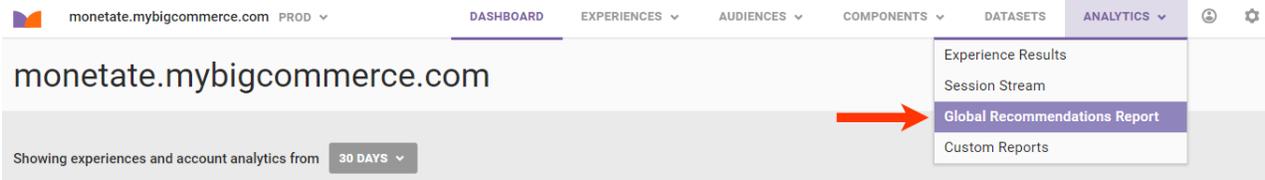
Recommendation Account Report

The Recommendation Account Report on the **Account Summary** tab contains charts and tables that indicate the overall performance of an account's recommendations program, specifically focusing on the impact that respondents have compared to visitors who didn't respond to the recommendations.

> ℹ️ If you have multiple accounts in Monetate, then you must be in the account to see its Recommendation Account Report. You cannot change accounts from the report screen.
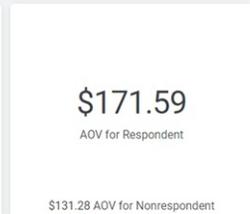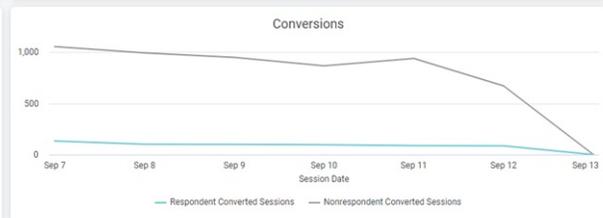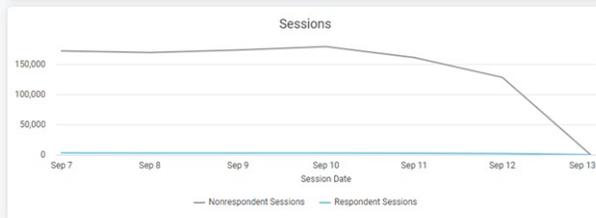
Global Recommendations Reports

Account Summary   All Experiences   All Products

Recommendation Account Report ♡

8m ago

Session Date
is in the last 7 days

15,189	$107,242.00	625	6.08	3.97%	$171.59
Respondent Sessions	Respondent Revenue	Respondent Orders	Respondent Units Per Transaction	Respondent Conversion Rate	Respondent Average Order
994,942 Total Sessions	$846,634.00 Total Revenue	6,318 Total Orders	5.12 Site Units Per Transaction	0.61% Site Conversion	$134.00 Site Average Order

Recommendation Performance

— Recommendation Revenue   — % Recommendation Revenue

$7.06	$25,721.00
Revenue Per Session Respondent	Revenue Generated By Recommendation
$0.85 Revenue Per Session Site	$846,634.00 Total revenue

Sessions

— Nonrespondent Sessions   — Respondent Sessions

Conversions

— Respondent Converted Sessions   — Nonrespondent Converted Sessions

Average Order Value

— AOV Nonrespondent   — AOV Respondent

$171.59
AOV for Respondent

$131.28 AOV for Nonrespondent

Units Per Transaction

— UPT Nonrespondent   — UPT Respondent

6.08
UPT for Respondent

5.06 UPT for Nonrespondent

You can change the lookback period by selecting an option from **Session Date** and then clicking the refresh icon.

In addition to accessing this report from **ANALYTICS** > **Global Recommendations Reports**, you can view it by clicking **VIEW ACCOUNT REPORT** on the Product Recommendations page.

All Recommendations Experiences Report

Click the **All Experiences** tab to view the Recommendation Experience Report (All).

Its charts and graphs capture various performance metrics for all active recommendations experiences in the account for the last 7 days. You can change the lookback period by selecting an option from **Session Date** and then clicking the refresh icon.

You can also narrow the scope of the report by clicking **Experience ID** and then selecting one or more IDs.
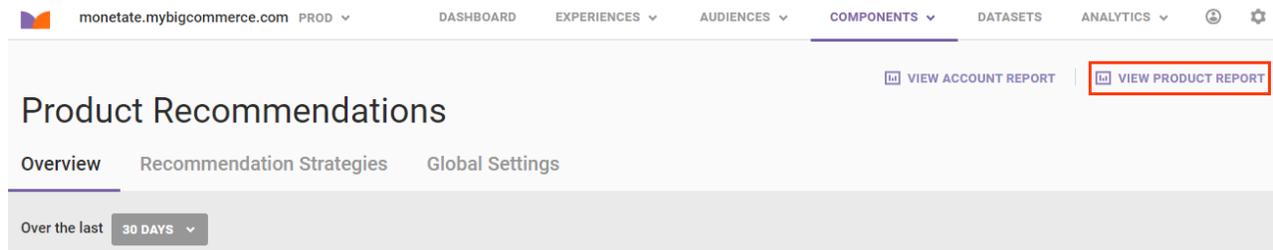
Product Report

Click the **All Products** tab to view the Recommendation Product Report. It contains information about all the products sold either directly or indirectly through recommendations for the account.
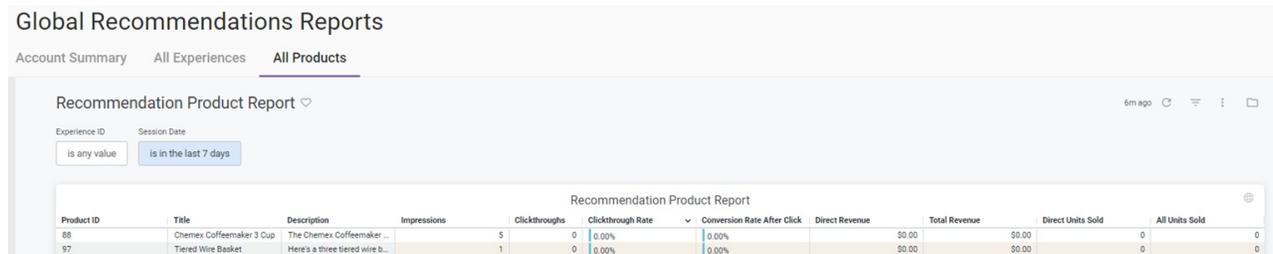
You can change the lookback period by selecting an option from **Session Date** and then clicking the refresh icon.
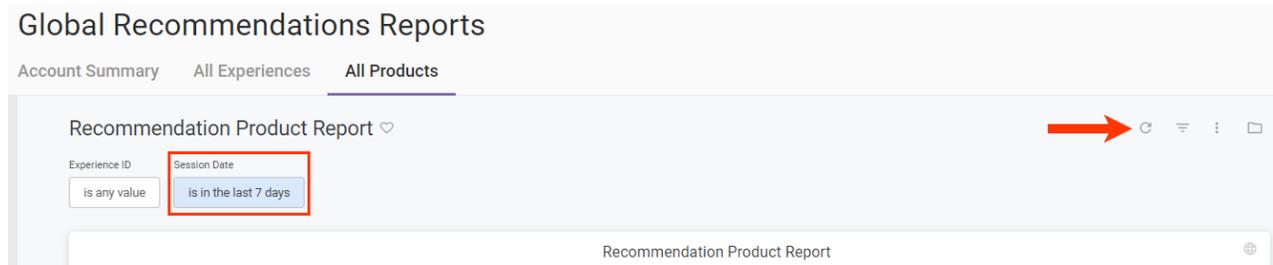
In addition to accessing this report from **ANALYTICS** > **Global Recommendations Reports**, you can view it by clicking **VIEW PRODUCT REPORT** on the Product Recommendations page.


While you can view an experience-specific version of this report by selecting its ID from **Experience ID**, you can better access it from the experience's Experience Results page. See Product Report in the Experience-Level Reports section of this documentation for more information.

Experience-Level Reports

Four reports about different aspects of a specific recommendations experience are available so that you can better understand how that experience is performing.

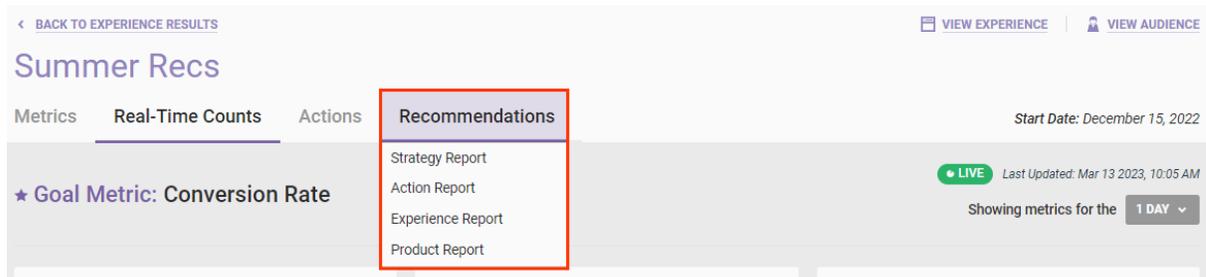Follow these steps to access one of these reports.

1. Click **ANALYTICS** in the top navigation bar, and then select **Experience Results**.
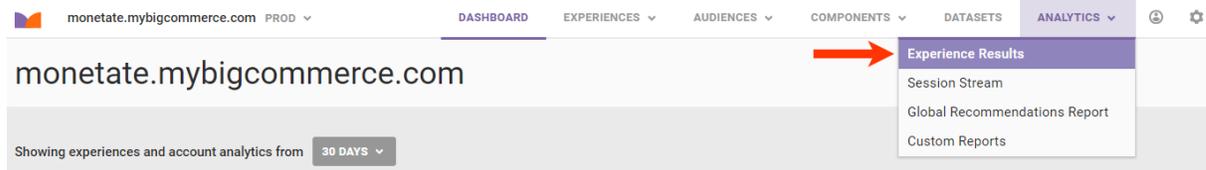
2. Search for the recommendations experience's entry on the Experience Analytics list page.
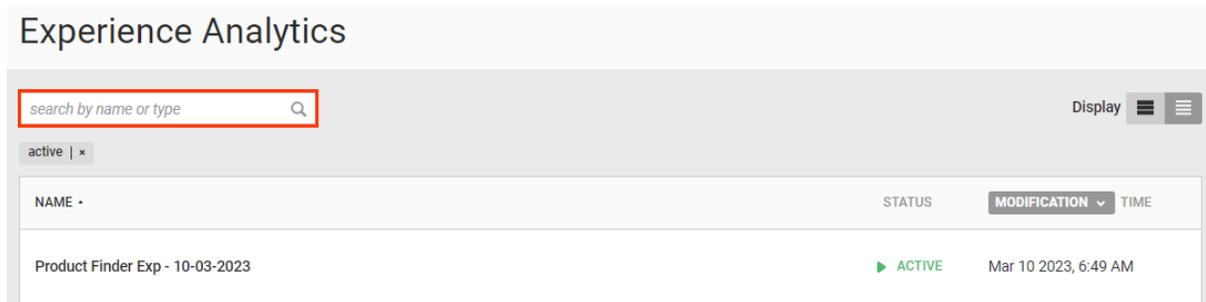
3. Click the experience's name.
4. Place your mouse pointer on the **Recommendations** tab, and then select one of the reports from the menu.

The report that you select opens in a new browser tab.

Strategy Report

The Recommendation Strategy Report contains various charts and tables that indicate how the recommendation strategy or strategies selected for the experience's recommendations action has performed over the past 7 days. If the experience has multiple recommendations actions, then each one is listed along with its selected recommendation strategy.

> ℹ️ If an experience includes a recommendations action that uses a slotted recommendation, then the report lists the individual recommendation strategies that make up the slotted recommendation. The name of the slotted recommendation doesn't appear.
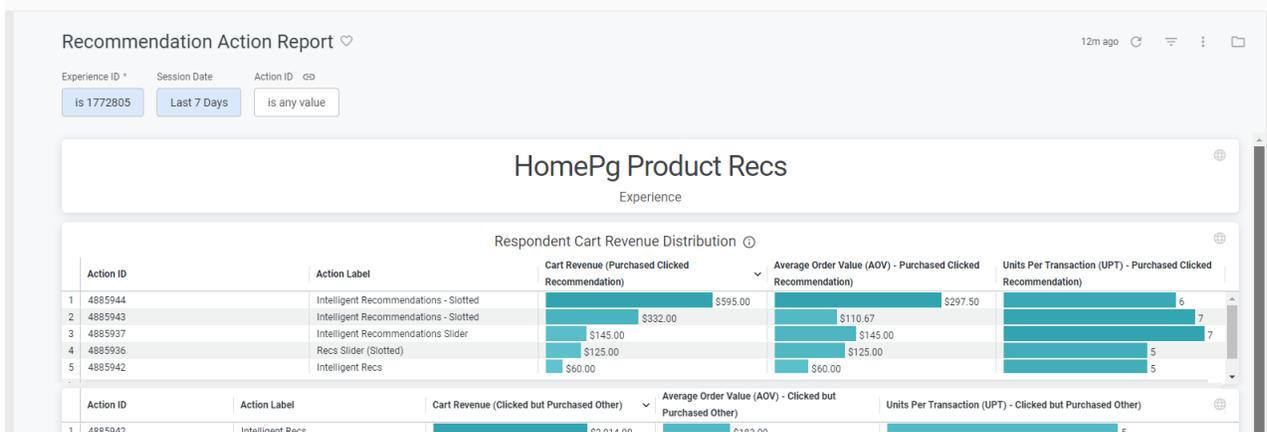
Product Recommendations Report
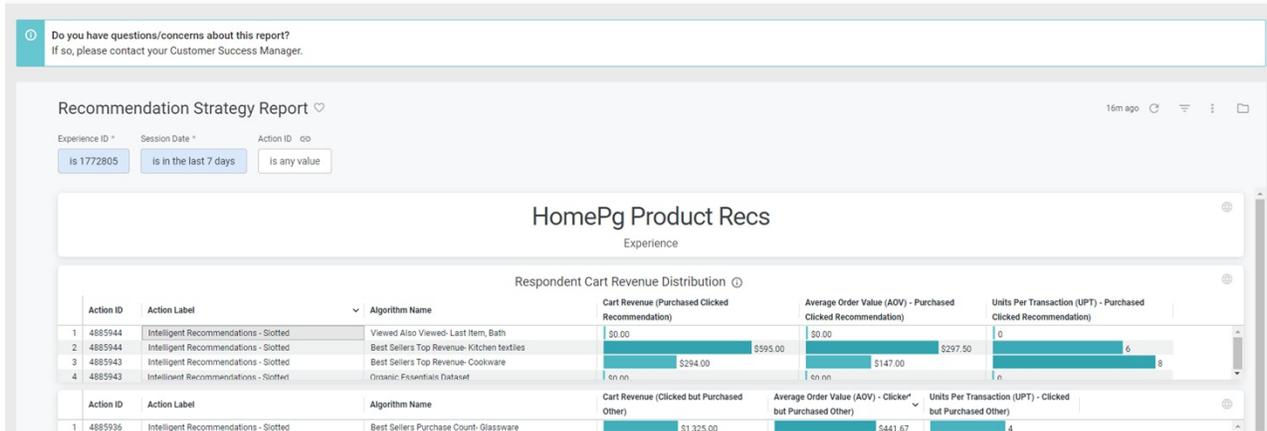
You can adjust the report's lookback period by selecting and configuring as necessary an option from **Session Date**. After you revise the filter, click the refresh icon.
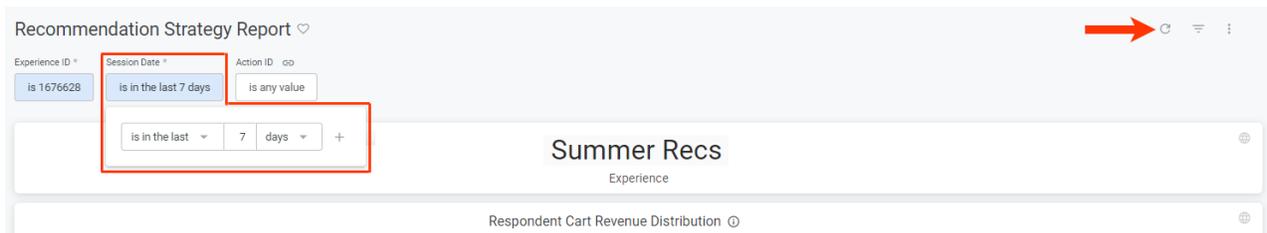
Action Report

The charts and graphs in the Recommendation Action Report help you understand how each recommendations action in a recommendations experience has performed over the last 7 days. Like the Recommendation Strategy Report, the Recommendation Action Report lists each recommendations action if the experience has multiple actions. However, the Recommendation Action Report doesn't include the recommendation strategy selected for each recommendations action in the experience.

You can adjust the report's lookback period by selecting and configuring as necessary an option from **Session Date**. You can also filter which actions appear in the report by selecting options from **Action ID**. If you adjust any

filter, ensure that you click the refresh icon.

Experience Report

This report contains various charts and tables that indicate how an experience is performing, specifically focusing on how each variant is performing.

Product Recommendations Report
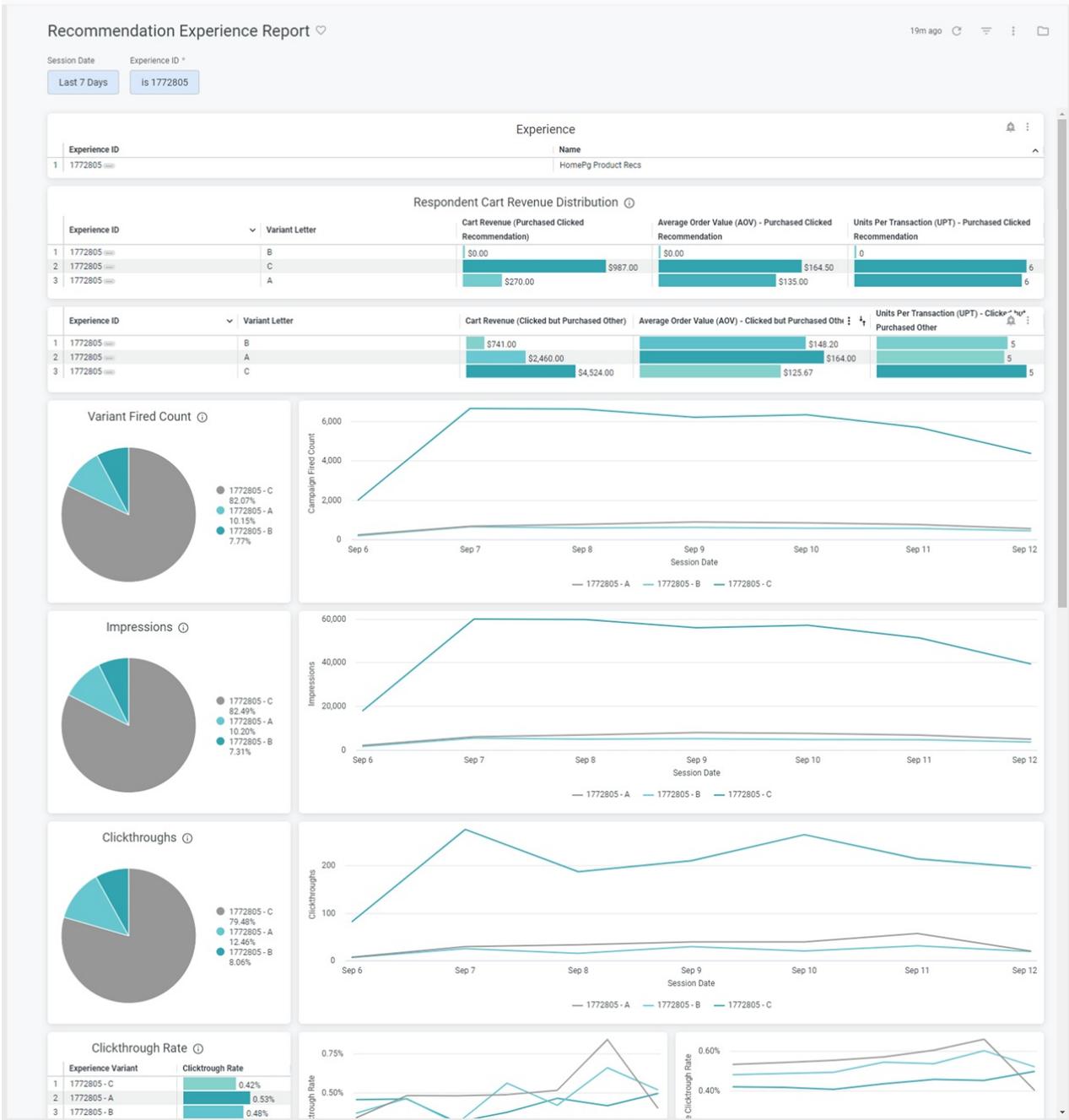
You can adjust the report's lookback period by selecting and configuring as necessary an option from **Session Date** and then clicking the refresh icon.

Product Report

Select **Product Report** to view a single table of all products directly and indirectly sold due to recommendations.

Product Recommendations Report

To adjust the report's lookback period, select and configure as necessary an option from **Session Date**, and then click the refresh icon.

Using Filters

The default filters applied to a report appear below the report title. Click the filters icon to hide or show the filters.

To adjust a filter, click it and then select an option. After you revise the filter(s), click the refresh icon.

To restore a report's filters to their defaults, click the additional options menu (⋮), and then select **Reset filters**.

> ❗ Clicking **Reset filters** removes the experience ID if you're viewing an experience-specific report.

You cannot remove a filter from nor add additional ones to any report.

Downloading Reports

You can download a report as a PDF or CSV file. First, click the additional options menu (⋮), select **Download**, and then select the file format. If you select **PDF**, you can select the paper size and choose certain other format options.

Click **Download** to generate the report, and then choose a location to save it.

Scheduling Report Deliveries

You can automatically generate and share a report on a schedule that you establish in Monetate. First, click the additional options menu (⋮), and then select **Schedule delivery**.

Global Recommendations Reports

Account Summary   All Experiences   **All Products**

Recommendation Product Report ♡   just now ⟳ ≡ ⋮ ▢

Experience ID   Session Date
is any value   is in the last 7 days

					Recommendation Product Report		
Product ID	Title	Description	Impressions	Clickthroughs	Clickthrough R... ∨	Conversion Rat...	Direct Revenue
88	Chemex Coffee...	The Chemex Co...	5	0	0.00%	0.00%	$0.00
97	Tiered Wire Bas...	Here's a three ti...	1	0	0.00%	0.00%	$0.00
77	Testing Title Na...	The perfect bea...	5	0	0.00%	0.00%	$0.00
94	Oak Cheese Gra...	Crafted from oa...	4	0	0.00%	0.00%	$0.00
107	Dustpan & Brush	A seemingly si...	1	0	0.00%	0.00%	$0.00

Dropdown menu:
- 🔄 Clear cache and refresh   ⇧ctrl↵
- ⬇ Download   alt⇧D
- → Schedule delivery   alt⇧S
- ≡ Reset filters   ctrlaltR
- 🌐 Each tile's time zone
  America - Chicago, unless otherwise noted

On the **Settings** tab of the Schedule Delivery modal, select how frequently you want the report generated and the timing associated with that choice. Choose an option from **Destination** to determine how you want to share the report (for example, by email to specific recipients, to a specific cloud location, via SFTP to a private directory). Finally, select the report format: PDF, CSV file, or image.

Schedule Delivery

Settings   Filters   Advanced options

Schedule Name

Recommendation Product Report

Recurrence   Time

Daily   ▼   06:00   ▼

Destination

✉ Email   ▼

Email addresses *   All (0)   External (0)

[   ] ❗

At least one email is required

Format

📄 PDF   ▼

Test now   Cancel   Save

Optionally, click the **Filters** tab to adjust as necessary the filters that are available for the report that you're scheduling.

Schedule Delivery

| Settings | **Filters** | Advanced options |

Experience ID

is 1676628

Session Date

is in the last 7 days

Test now   Cancel   Save

The settings that appear on the **Advanced options** tab are determined by the option you selected from **Destination** and from **Format** on the **Settings** tab. The options on the **Advanced options** tab allow you to customize the layout, appearance, or formatting of the report data in the file generated. The one option that always appears on the **Advanced options** tab is **Delivery timezone**.

Schedule Delivery

Settings   Filters   **Advanced options**

Custom Message   0/1500

Add a message to be included in the body of the email.

☑ Include links

☐ Expand tables to show all rows ⓘ

☐ Arrange dashboard tiles in a single column

Paper size

Fit Page To Dashboard ▾

Delivery timezone

America - Chicago ▾

Test now   Cancel   Save

The screenshot above shows the options available on the **Advanced options** tab for a weekly PDF report sent via email.

After you configure the schedule and report formatting options, click **Save** to close the Schedule Delivery modal.