Configure a Strategy with Offline Purchases Data

The Offline Purchases Data feature is part of the Monetate Personalization Enhanced product bundle and the Monetate Personalization Suite. Contact your dedicated Customer Success Manager for more information.

Follow these steps to create a recommendation strategy that uses data from the Offline Purchases dataset set as the default on the **Global Settings** tab of the Product Recommendations page.

If an Offline Purchases dataset is not set as the default on the **Global Settings** tab, then any recommendation strategy configured with offline purchases data will not work as expected. See Global Settings for more information.

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 from **Recommendation Algorithm** one of the algorithms that's eligible for use with offline purchases data:
    - Top Selling by Purchase Count
    - Top Selling by Gross Revenue
    - Purchased and Also Purchased
    - Trending Items by Purchase Count

7. Select either **Offline purchases only** or **Online and offline purchases** from **Including**.

8. If you selected **Purchased and Also Purchased** in step 6, then select from **Base Recommendation on** the type of customer behavior or other context on which to base the recommendations.

   > The **Item group ID(s) in run-time parameter (for email)** option is part of the Product Recommendations for Email feature. If you select it, you can use up to five `item_group_id` values passed in a run-time parameter for a Product Recommendations for Email experience. See Preparing the Generated HTML in Run-Time Context for Recommendations Email Experiences.

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 **Purchased and Also Purchased** in step 6, then 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.

11. 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 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.

12. If you selected any recommendation algorithm except for **Trending Items by Purchase Count** in step 6, then select an option from **Lookback Period** to set how much historical data the strategy considers when calculating results.

13. If you selected **Top Selling by Purchase Count** or **Top Selling by Gross Revenue** in step 6, then optionally select an option from **Geographic Targeting** if you want the strategy to also consider the customer's location to populate the recommendations:
    - **Country targeting** — Only products relevant to the customer's country are recommended
    - **Region targeting** — Only products relevant to the customer's region, as defined in MaxMind's GeoIP2

database, are recommended

14. Optionally, toggle **Randomize Results** to **YES** if you want the order in which recommended products appear in the slider to be less systematized. See Product Recommendations Overview for more information about how this setting works.

15. To further refine the recommendations results, 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. See Excluding Previously Purchased Products from Results in this documentation if you want to ensure results don't include items the customer has already bought.

16. 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.

17. Click **SAVE**.

Excluding Previously Purchased Products from Results

Follow these steps to create a recommendation filter that specifically excludes previous purchases from the recommendations results.

1. Click **ADD FILTER**, and then select either **Item Group ID (Product ID)** or **ID (SKU)** from **SELECT ATTRIBUTE**.

2. Select ≠ **does not equal** for the operator.

3. Click **USE DYNAMIC VALUE**.

4. Select **[attribute] of a Previously Purchased Product**.

This filter configuration excludes from the recommendations results both products purchased online and products purchased in store that appear in the designated Offline Purchases dataset.