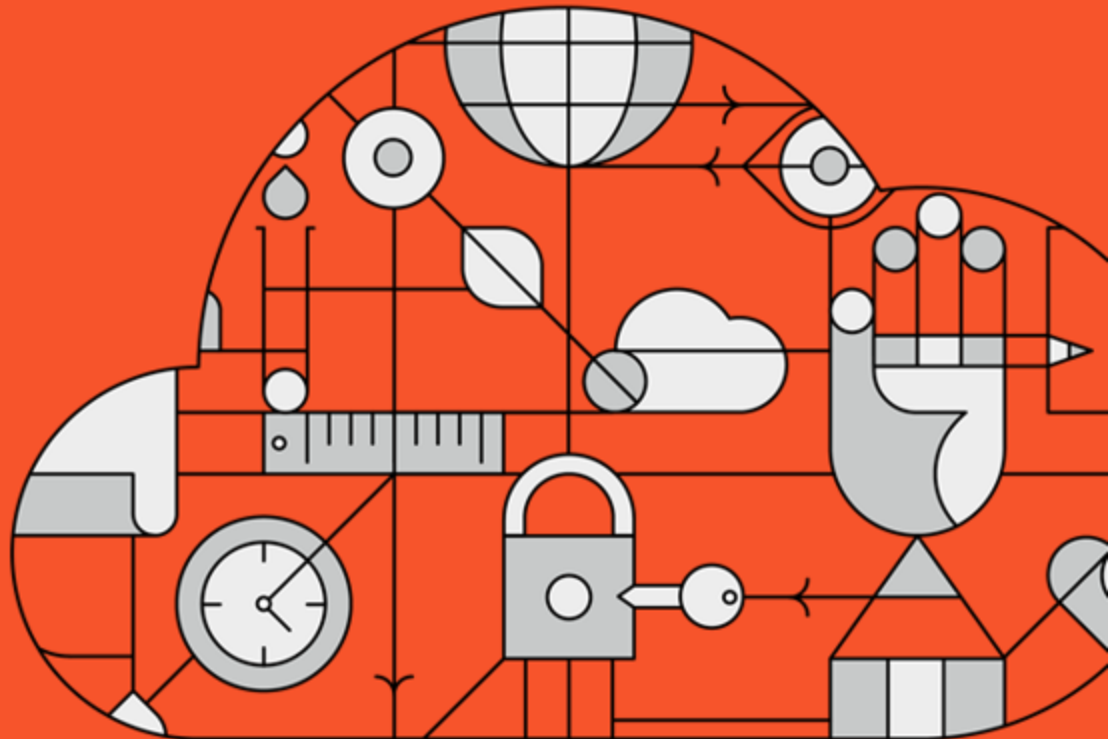




# Recommendations User Guide

## Personalization Portal - Episerver Perform





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Recommendations User Guide Personalization Portal - EpiServer Perform

v04

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**Perform**

## Merchandising rules for Recommendations

This document shows how to create and configure a merchandising campaign.

Episerver Personalization is the most advanced personalization tool set on the market. At its heart is the T3 platform, a third-generation, proven technology that delivers consistently outstanding results. Episerver Recommendations User Guide are easy to implement on every page of your website, working to maximize the impact of personalized product recommendations.

Each recommendations widget on your site is configured in the Episerver back-end according to a pre-agreed strategy. Each widget can have its own strategy depending on the identified KPIs for personalization. If there is more than one widget served on the same page, each of the widgets also can have a different strategy.

A **strategy** comprises a number of algorithms, developed by our data scientists and machine learning experts. The algorithms are applied to each widget in a stack formation. This means that the personalization engine looks at the user's behavior, and tries to return a recommendation matching the first algorithm in the stack. If the system is unable to identify a suitable product, it looks at the next algorithm in the stack, and so on, until the required number of products for this widget are returned.

Episerver's Merchandising interface gives you the flexibility and control to further refine the recommendations generated by Episerver algorithms, or completely override Episerver recommendations to execute specific campaigns in line with your overall site strategies and targets.

You can control merchandising rules in the Episerver Personalization Portal, switching them on/off and changing them in real time.

## Accessing the Merchandising interface

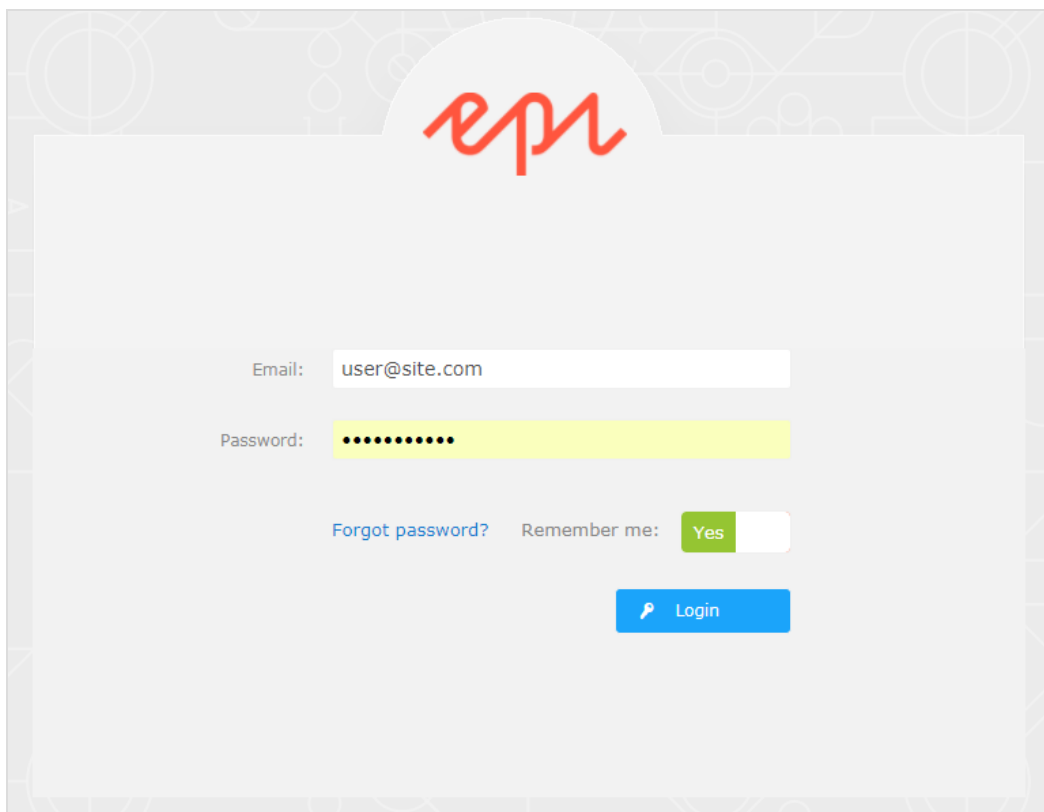
The Merchandising interface is available in the Episerver web-based Personalization Portal.

1. Access the Episerver Personalization Portal at the URL provided to you when your user account was created. This will be one of the following URLs:

`https://smartmanager.peerius.com/admin`

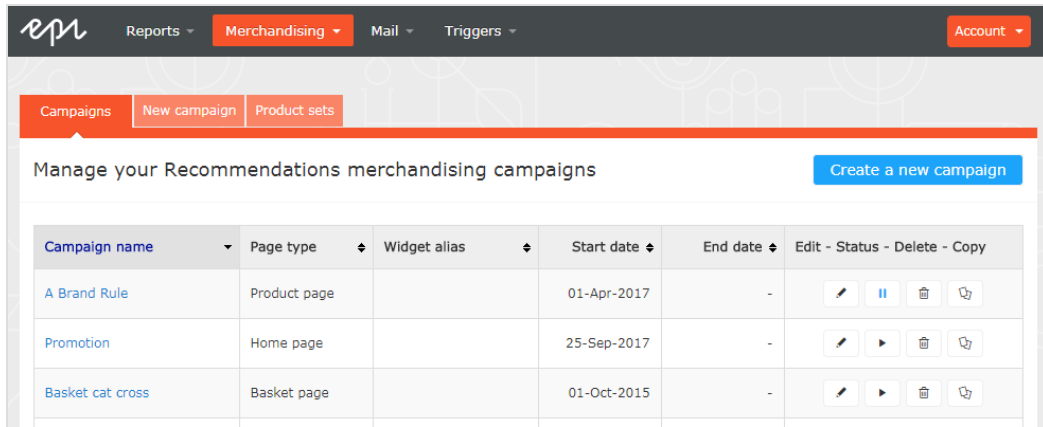
`https://smartmanager.peerius.episerver.net/admin`

2. Log in to the Episerver Personalization Portal with your provided credentials. If you don't have your login details, contact [developersupport@episerver.com](mailto:developersupport@episerver.com).
















The screenshot shows the login page for the Episerver Personalization Portal. At the top center is the 'epi' logo in red. Below it is a white login form with a light gray border. The form contains an 'Email:' field with the text 'user@site.com', a 'Password:' field with ten black dots, a 'Forgot password?' link in blue, a 'Remember me:' label, and a green 'Yes' toggle switch. At the bottom right of the form is a blue 'Login' button with a white key icon.

3. Select the **Merchandising** tab in the navigation bar. In the Merchandising interface, you can create new campaigns, and view or edit the campaigns that you have already set up.



The screenshot shows the Episerver Recommendations Merchandising Campaigns management interface. At the top, there is a navigation bar with the Episerver logo and menu items: Reports, Merchandising (highlighted), Mail, and Triggers. An Account dropdown is on the right. Below the navigation bar, there are three tabs: Campaigns (selected), New campaign, and Product sets. The main heading is "Manage your Recommendations merchandising campaigns" with a "Create a new campaign" button on the right. Below this is a table with the following data:

Campaign name	Page type	Widget alias	Start date	End date	Edit - Status - Delete - Copy
<a href="#">A Brand Rule</a>	Product page		01-Apr-2017	-	   
<a href="#">Promotion</a>	Home page		25-Sep-2017	-	   
<a href="#">Basket cat cross</a>	Basket page		01-Oct-2015	-	   

4. Click **Create a new campaign** to start setting up a new campaign.
5. To edit an existing campaign, click the campaign name or **Edit** () next to it.

## Setting up a Merchandising campaign

To create a new campaign, you can click **Create a new campaign** from the Merchandising overview screen, or select the **Merchandising > New campaign** tab. The campaign editing screen appears.

There are five steps in the set-up process:

1. [Configuring main campaign details](#)
2. [Defining master rules](#)
3. [Defining recommendation rules](#)
4. [Applying exclusions](#)
5. [Setting up activation and preview](#)

### Configuring main campaign details

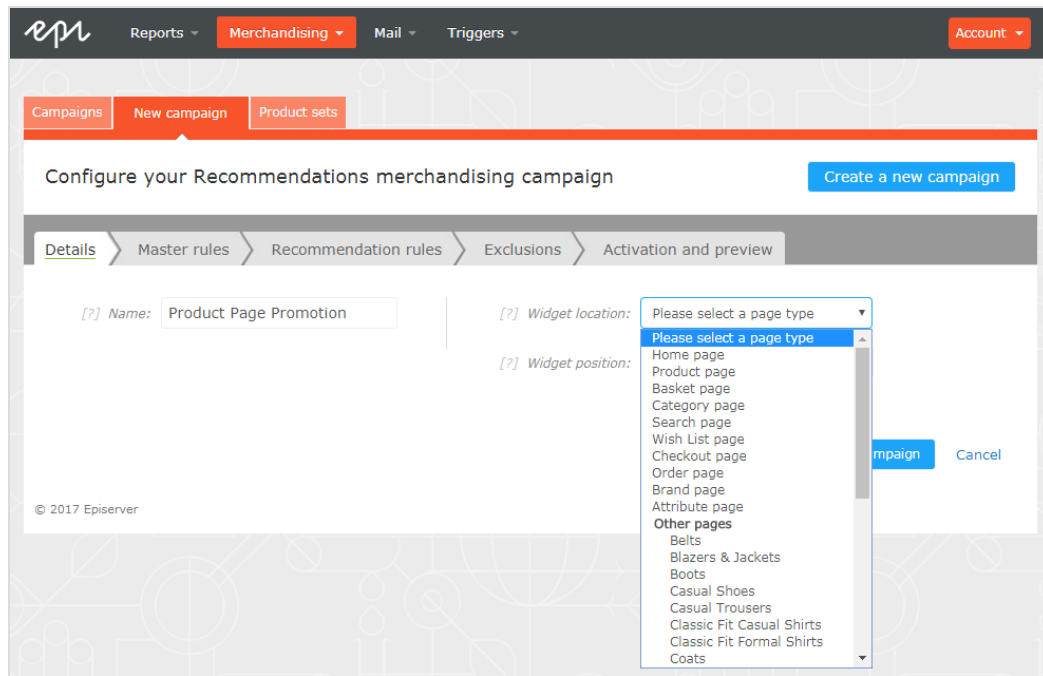
In the **Details** tab, configure the main details of the campaign: **name**, **location** and **position** of the widget to which the campaign is applied.

1. Enter a name for the campaign you are creating, such as **Product Page Promotion**, **Brand Rule**.

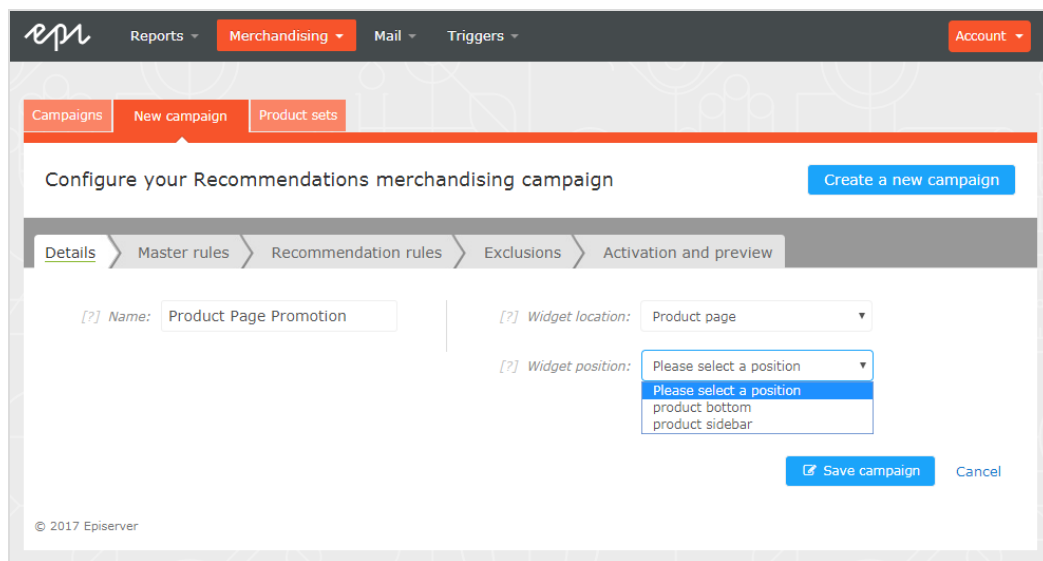
The screenshot shows the Episerver Merchandising interface. At the top, there's a navigation bar with 'Reports', 'Merchandising', 'Mail', and 'Triggers' menus, and an 'Account' dropdown. Below this, there are tabs for 'Campaigns', 'New campaign', and 'Product sets'. The main heading is 'Configure your Recommendations merchandising campaign' with a 'Create a new campaign' button. A progress bar shows five steps: 'Details', 'Master rules', 'Recommendation rules', 'Exclusions', and 'Activation and preview'. The 'Details' step is active and contains three input fields: '[?] Name' with the placeholder 'e.g. product page promotion', '[?] Widget location' with a dropdown menu 'Please select a page type', and '[?] Widget position' with a dropdown menu 'Please select a position'. At the bottom right, there are 'Save campaign' and 'Cancel' buttons. The footer shows '© 2017 Episerver'.

2. Select the widget location; this is the page type where the target widget of the Merchandising campaign is located.





3. Select the widget you want this campaign to be applied to. The widget position drop-down lists available widgets on the selected destination page.



## Defining master rules

Setting up **Master rules** is optional.

By using this feature you can further refine what pages, products or users a campaign affects. If you don't specify any master rules, the merchandising rules are applied globally across the selected widget

for this campaign. If you choose to apply a Master rule, then this rule needs to be satisfied for the recommendation rules to be applied.

Examples of **Master rules** frequently used:

Use case	Master rule	Recommendation rule
Recommend only products from the same brand as the current product being viewed.	Brand <b>equals to</b> and type the brand name in the Search field.	Brand <b>equals to</b> and type the brand name in the Search field.
Recommend a specific product SKU when a specific product is viewed (i.e. override with a hand-picked product).	Ref Codes <b>equals to</b> and type the product SKU.	Ref Codes <b>equals to</b> and type the product SKU.
Only recommend products above a specific price when a user is viewing a product above a certain price.	Sale Price <b>greater than or equals to</b> and type in the price (such as <b>25</b> ).	Sale Price <b>greater than or equals to</b> and type in the price (such as <b>25</b> ).
Do not recommend discounted products when a user is viewing a full priced product.	Discount <b>equals to</b> False.	Discount <b>equals to</b> False.

1. To add a Master rule, open the first drop-down menu to select the attribute that you want in the rule. A list appears of available product attributes for your products (based on the product feed, plus a few attributes the system creates by default). If you do not see the attribute that you want, add it to your product feed. Contact [developersupport@episerver.com](mailto:developersupport@episerver.com) if you have any questions about this.
2. To select an attribute, click on it in the list. In this example, select **Brand**.
3. Select the condition you would like to use in your rule. For attributes which have a text value, for example **Color** or **Brand**, you can choose between **equals to** or **NOT equals to**. For attributes with a numeric value, for example **Sale price** or **Unit price**, you also can use comparison operators like **greater than** or **less than**.
4. In the text field on the right, enter the value of the attribute that will be evaluated in this rule. For most attributes you will see a drop-down list with possible values when you click in the text field. You also can start typing in the box to filter the results. To choose a value, click on it. For numeric values (such as prices) you will not see a pre-populated list and you will need to enter the value manually.

Configure your Recommendations merchandising campaign [Create a new campaign](#)

Details > **Master rules** > Recommendation rules > Exclusions > Activation and preview

**Master rules [optional]**

Use the expression filter below to further refine what pages, products or users this campaign will affect.  
 If you don't specify any master rules, the recommendation rules will be applied globally across the selected widget for this campaign.

[Toggle advanced](#)

Brand equals to C [-](#) [+](#) [Add group](#)

- calvin klein
- cette
- cette berlin
- cette dublin
- charnos
- Last viewed

[Save campaign](#) [Cancel](#)

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You can add multiple rules by clicking the **Add group** or plus **+** button. When using multiple rules you can choose how you wish them to interact by setting the **AND** or **OR** operator.

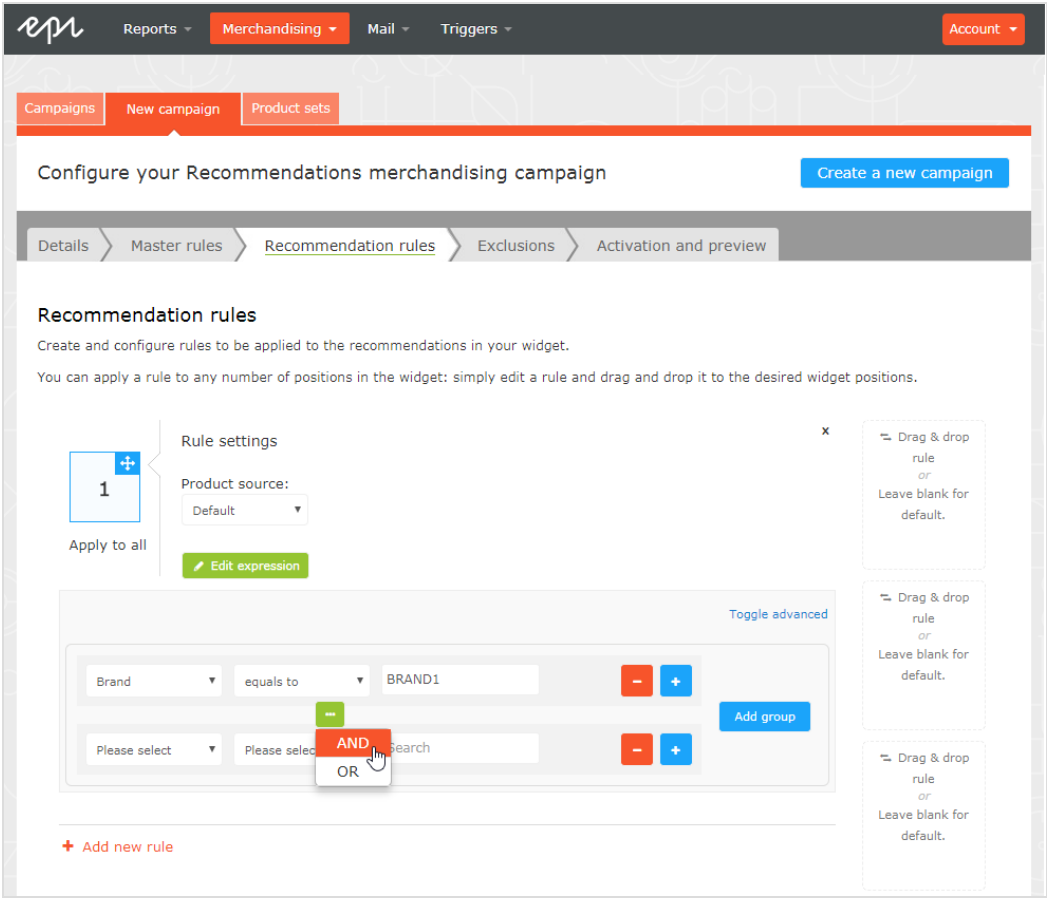


To remove a rule, click minus (-) next to it.

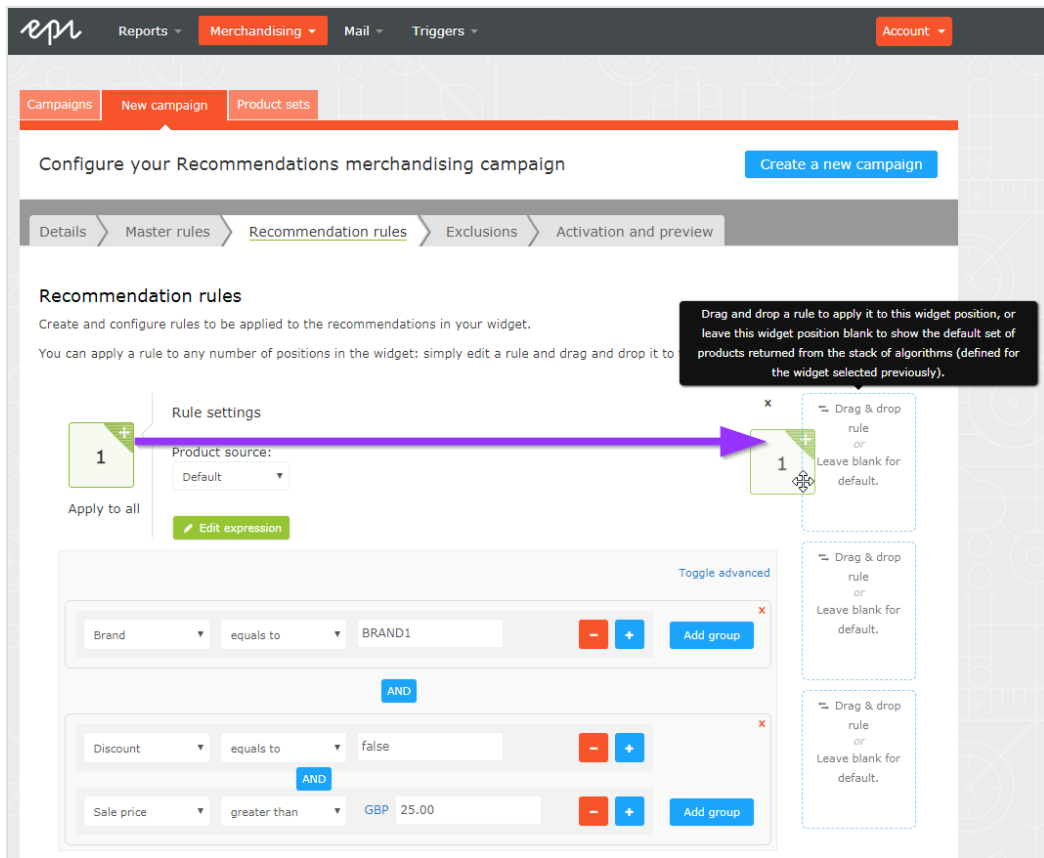
## Defining recommendation rules

Create and configure the rules to be applied to the product recommendations shown in your widget. You can apply a rule to any number of positions in the widget. You also can create different rules for each position, or leave a position blank to show the default output of the Episerver algorithms.

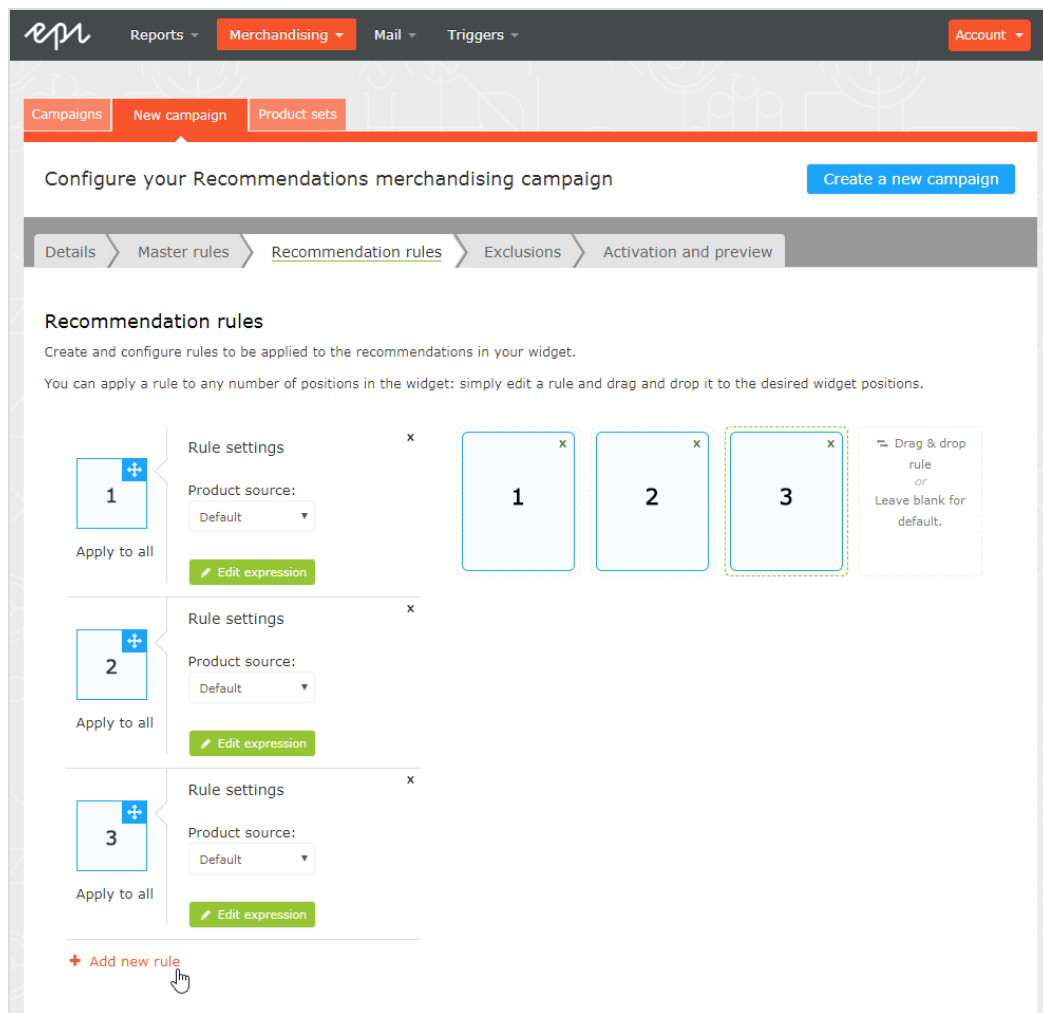
1. Click **Edit expression** to start creating your recommendation rule.
2. You can add the required criteria for the recommendations in the same way as you would for a Master rule (detailed in the previous section). You also can add more than one criterion in the same rule by using the **+** and **Add group** buttons, and the **AND** and **OR** operators.



- 3. After you finish setting up your rule, drag and drop the rule number to the required position in the widget, where you want it applied. If you want the same rule to apply to all products in a widget, click on the **Apply to all** link.



4. You can add more than one rule to the same campaign, in case you want to apply different rules to different positions in the same widget, for example if you want the first product to have a price over **25.00**, the second product between **15.00** and **25.00**, and the third product under **15.00**. To add another rule simply click on the **Add new rule** button at the bottom of the page and configure and apply your new rule in the same way.



The **Product source** in the **Rule settings** determines whether the rule should be applied on top of the personalized algorithms or override them. For most campaigns, keep the source as **Default**, which tells the system to generate the recommendations following the personalized strategy configured in the Episerver backend, and then filter them using the recommendation rules in the Merchandising campaign.

For campaigns where you want to override the Episerver algorithms output with your own product selection, change the product source to **Handpick**. Then you can use the **Ref codes** or **Product set** criteria in your rule to specify a product SKU or group of products to display.

5. After you finish setting up the recommendation rules, save your campaign.

## Applying exclusions

Exclusions are optional. This feature lets you specify any products that you do not wish to show in recommendations in the widget specified in the campaign (in the **Details** tab). For example, you set up a

recommendation rule to only show products from a specific brand, BRAND1, but there are some products from BRAND1 that you actually do not want to show.

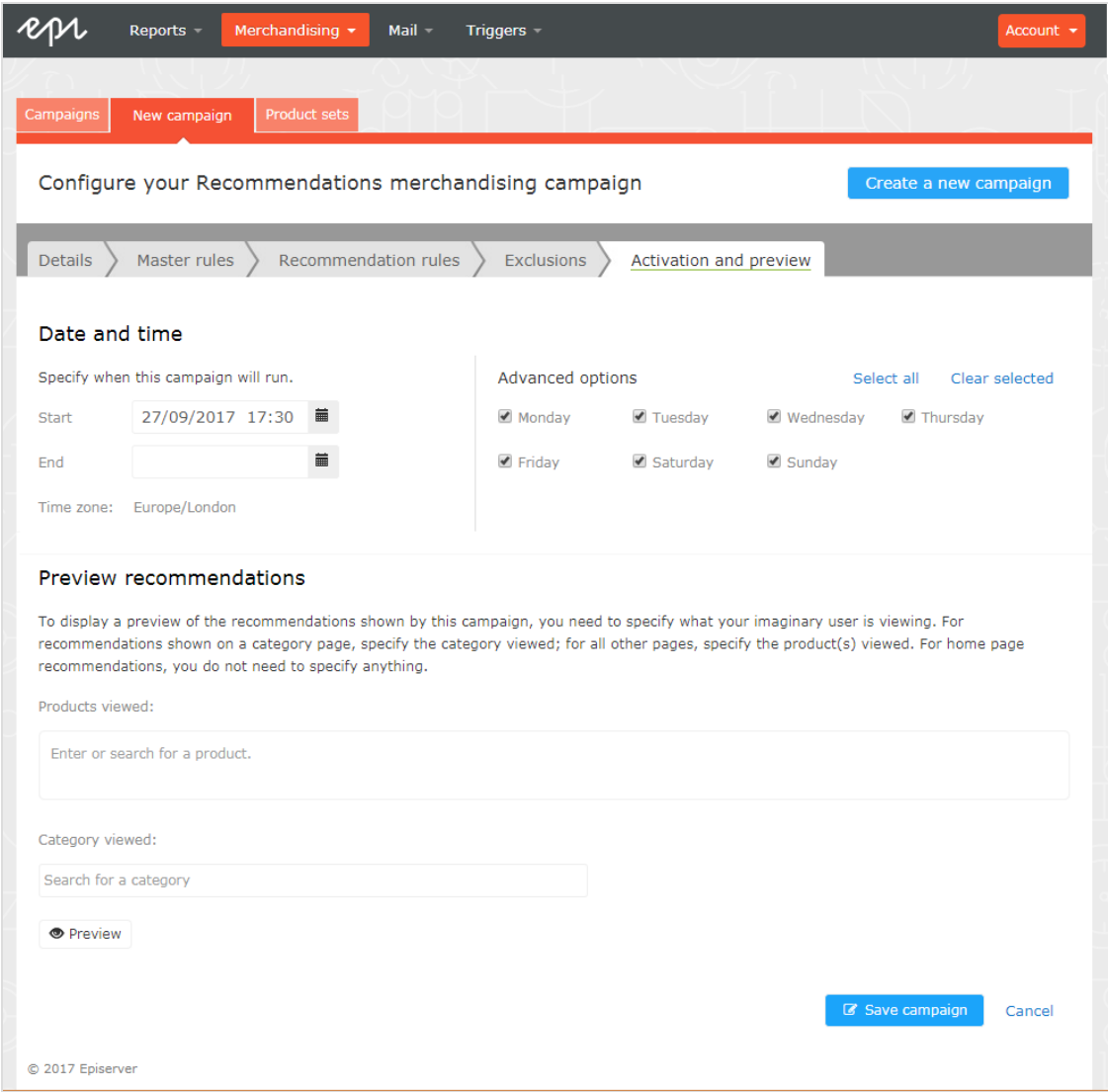
In the search field you can type a product SKU/refCode or title to find the product you want to exclude from recommendations. Click on the products in the results to add them to the exclusions list, and click **Finished** when you have added all your exclusions.

The screenshot shows the Episerver Recommendations Merchandising Campaign configuration interface. The top navigation bar includes 'Reports', 'Merchandising', 'Mail', 'Triggers', and 'Account'. Below this, there are tabs for 'Campaigns', 'New campaign', and 'Product sets'. The main heading is 'Configure your Recommendations merchandising campaign' with a 'Create a new campaign' button. A breadcrumb trail shows 'Details' > 'Master rules' > 'Recommendation rules' > 'Exclusions' > 'Activation and preview'. The 'Exclusions' tab is active, titled 'Exclude products', with the instruction 'Specify any products that you don't wish to show in the recommendations.' Below this, it says 'Products to exclude from recommendations:'. There are three blue cards representing excluded products: 'White Shirt Product:123', 'Blue Shirt Product:234', and 'Denim Shirt Product:345'. Below these is a search field containing 'Product456'. A 'Finished' button is visible, along with a 'Clear all' link. At the bottom, there is a 'Printed Shirt Product:456' card. The interface includes 'Save campaign' and 'Cancel' buttons at the bottom right, and a copyright notice '© 2017 Episerver' at the bottom left.

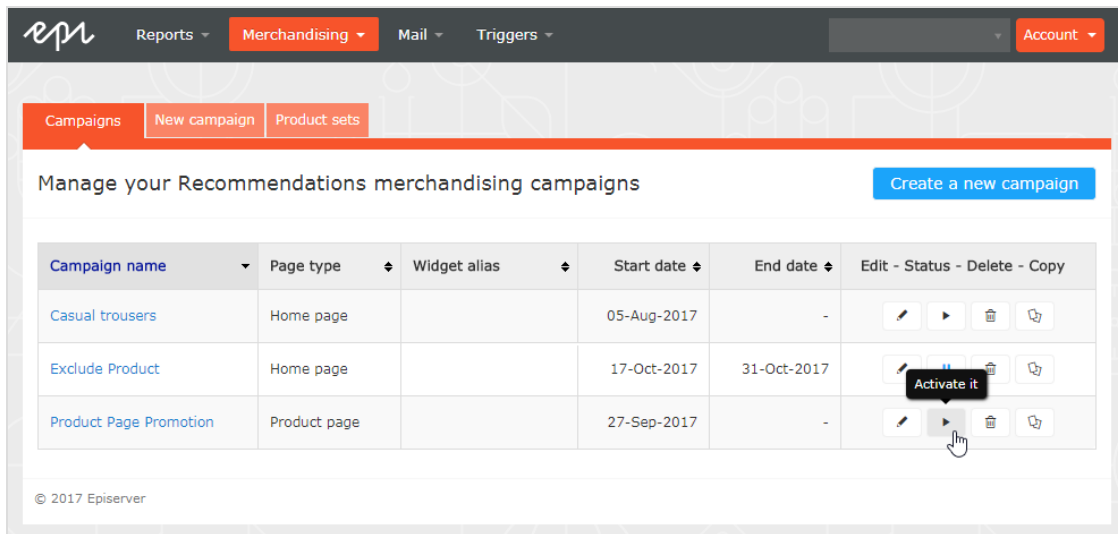
## Activating and previewing

In the **Activation and Preview** tab, you can specify a start and end date for your campaign, select days of the week to run the campaign, and preview the campaign using a product or category.





When a campaign is ready, click **Save campaign** and return to the **Campaigns** tab. New campaigns are inactive by default, so find your campaign and click **Play** (▶) to activate it. You can pause/deactivate a campaign in the same way. Changes are applied immediately to your site.



If you have questions about how to use the Merchandising interface, contact your Episerver Customer Success Manager or contact [developersupport@episerver.com](mailto:developersupport@episerver.com).