



Episerver Perform

Recommendations User Guide





© EpiServer 2018

EpiServer Perform Recommendations User Guide v04

CONTENTS

Merchandising rules for Recommendations	6
Accessing the Merchandising interface	7
Setting up a Merchandising campaign	10
Configuring main campaign details	10
Defining master rules	12
Defining recommendation rules	15
Applying exclusions	19
Activating and previewing	20

Perform Merchandising rules for Recom-

mendations

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 Episerver Perform 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 visitor'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 lets you refine the recommendations generated by Episerver algorithms, or completely override Episerver recommendations to execute specific merchandising campaigns in accordance with your overall site strategies and targets.

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

Accessing the Merchandising interface

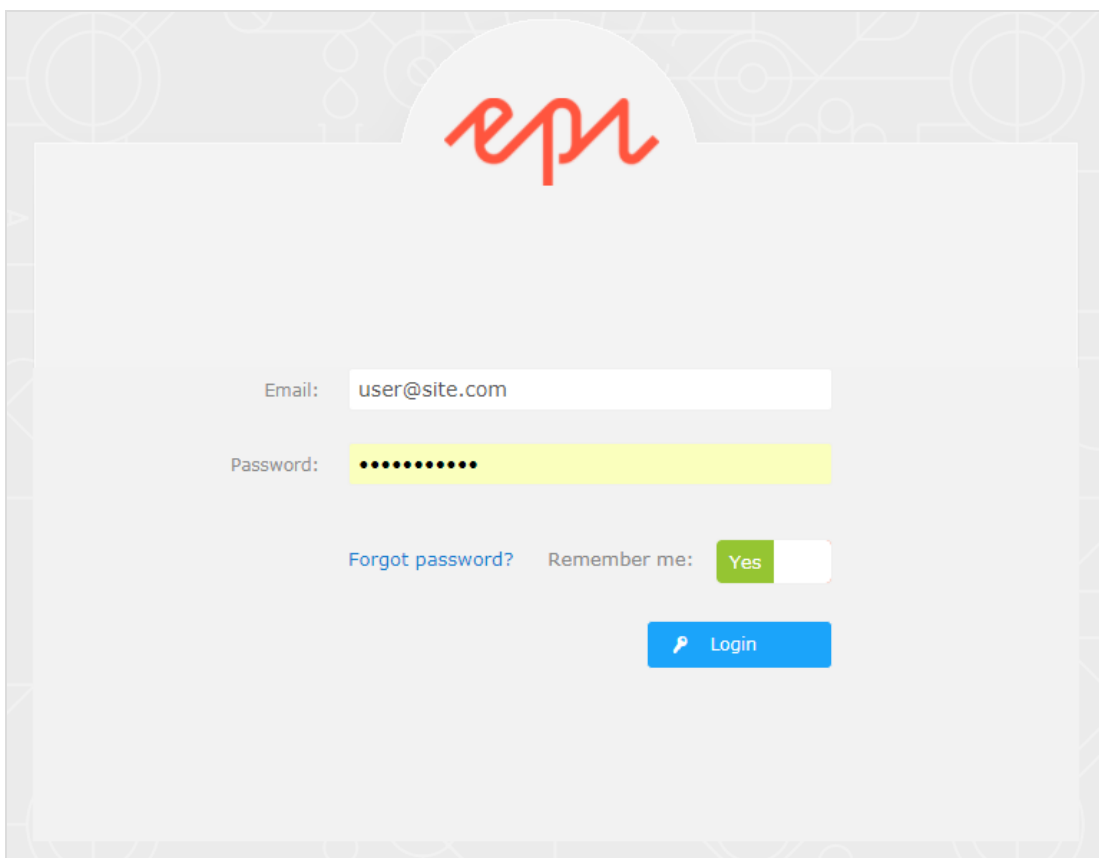
The Merchandising interface is available in the Episerver web-based for the Personalization Portal.

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

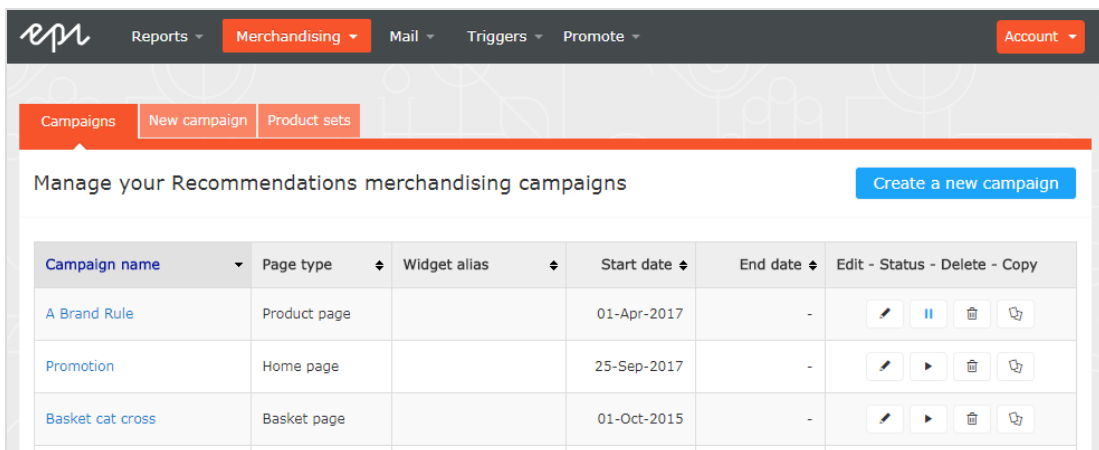
`https://smartmanager.peerius.com/admin`


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

2. Log in to the Episerver for the Personalization Portal with your provided credentials. If you do not have your login details, contact developer-support@episerver.com.



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



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

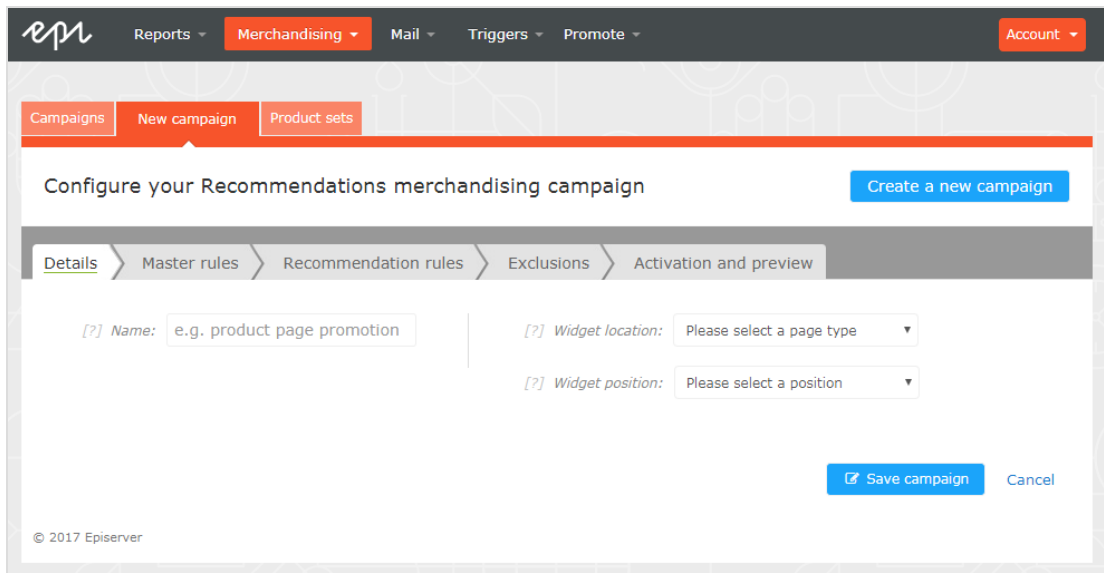
To create a new merchandising campaign, click **Create a new campaign** from the Merchandising overview screen, or select the **Merchandising > New campaign** tab. The campaign editing screen appears. The set-up process involves the following steps:

1. **Configuring main campaign details**
2. **Defining master rules**
3. **Defining recommendation rules**
4. **Applying exclusions**
5. **Setting up activation and preview**

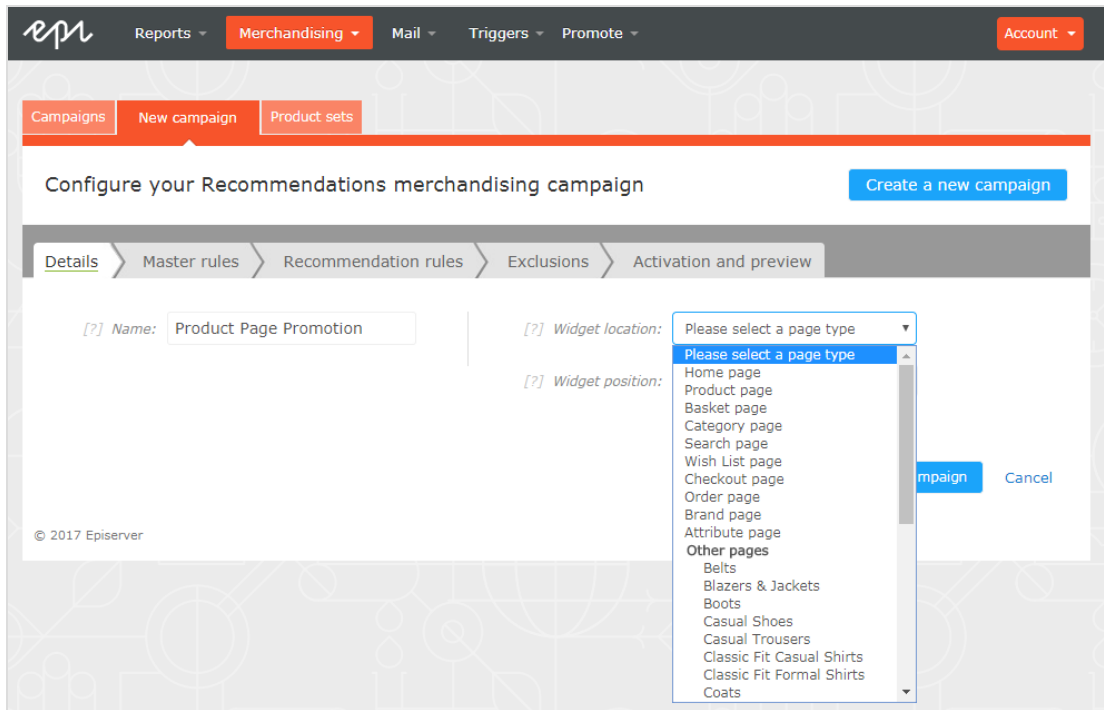
Configuring main campaign details

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

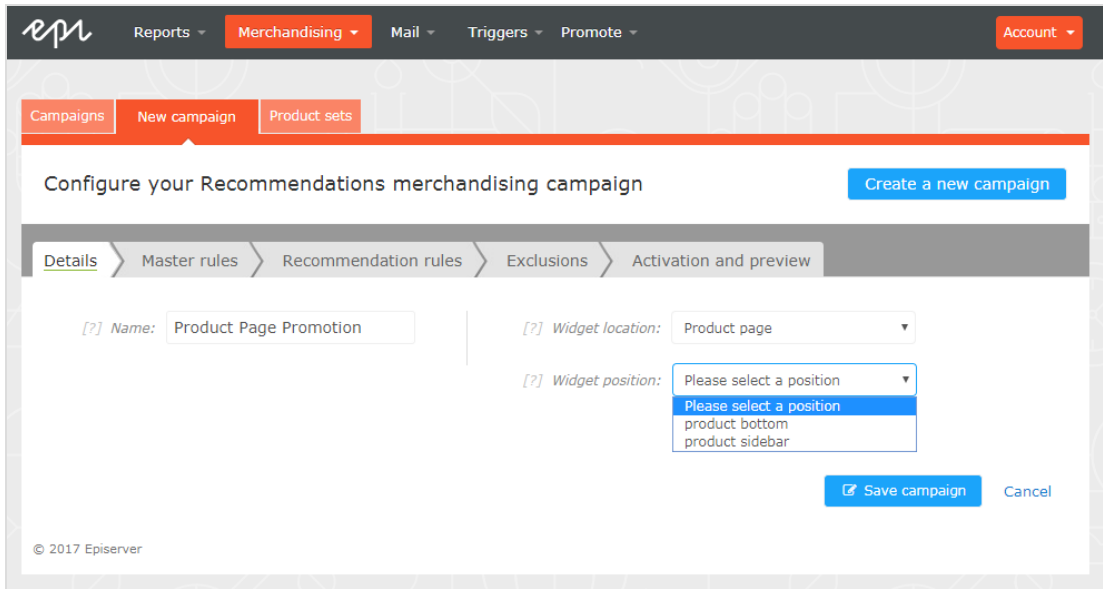
1. Enter a name for the campaign you are creating, such as **Product Page Promotion**, **Brand Rule**.



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.

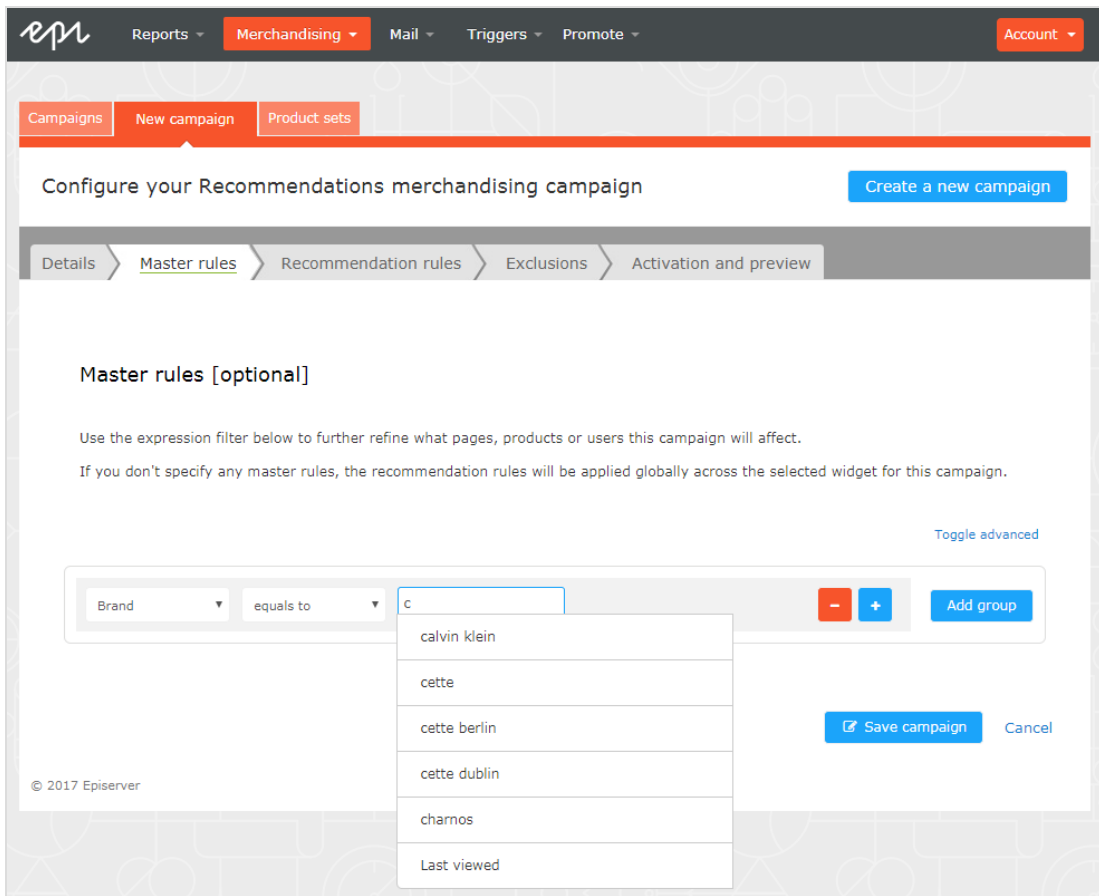
Master rules let you refine the merchandising campaign effects to pages, products, or visitors. If you do not specify any master rules, the merchandising rules are applied globally across the selected widget for a campaign. If you apply a Master rule, it must be satisfied to apply recommendation rules.

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 equals to and type the brand name in the Search field.	Brand equals to and type the brand name in the Search field.

Use case	Master rule	Recommendation rule
Recommend a specific product SKU when a specific product is viewed (i.e. override with a hand-picked product).	Ref Codes equals to and type the product SKU.	Ref Codes equals to 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 greater than or equals and type in the price (such as 25).	Sale Price greater than or equals and type in the price (such as 25).
Do not recommend discounted products when a user is viewing a full priced product.	Discount equals to False.	Discount equals to False.

1. To add a Master rule, select the product attribute for your products from the drop-down menu. The attributes are based on the product feed, plus a few attributes that Episerver creates by default. If you do not see the attribute that you want, add it to your product feed.
2. Select the condition you want in your rule. For attributes that have a text value, such as **Color** or **Brand**, choose between **equals to** or **NOT equals to**. For attributes with a numeric value, such as **Sale price** or **Unit price**, you also can use comparison operators like **greater than** or **less than**.
3. In the text field, enter the value of the attribute to be evaluated. For most attributes, a drop-down list shows values when you click in the text field. You also can start typing in the box to filter the results. To select a value, click on it. Numeric values (such as prices) do not have a pre-populated list; enter the value manually.



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

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 calvin klein [-](#) [+](#)

Please select Please select **AND** [-](#) [+](#)

[Add group](#)

...

Please select Please select Search [+](#) [Add group](#)

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

© 2017 Episerver

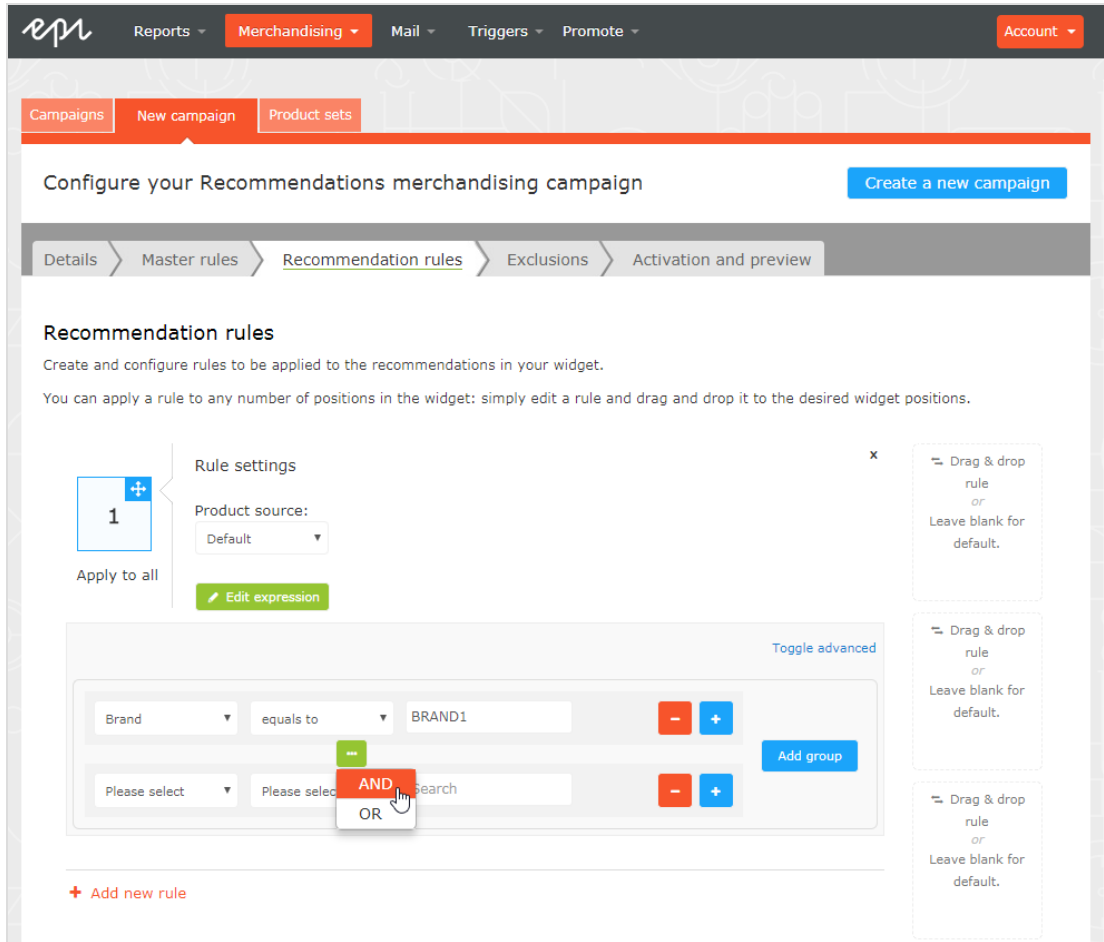


To remove a rule, click minus - next to it.

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 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**.
2. You can add the required criteria for the recommendations in the same way as you would for a **Master rule**. You also can add more than one criterion in the same rule by using **+** and **Add group**, 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 **Apply to all**.

The screenshot displays the Episerver Merchandising campaign configuration interface. At the top, there are navigation tabs for 'Campaigns', 'New campaign', and 'Product sets'. Below this, a breadcrumb trail shows 'Details' > 'Master rules' > 'Recommendation rules' > 'Exclusions' > 'Activation and preview'. The main heading is 'Configure your Recommendations merchandising campaign' with a 'Create a new campaign' button. The 'Recommendation rules' section includes instructions: 'Create and configure rules to be applied to the recommendations in your widget. You can apply a rule to any number of positions in the widget: simply edit a rule and drag and drop it to...'. A 'Rule settings' panel on the left shows 'Product source: Default' and an 'Apply to all' checkbox. Below this are two rule groups: 'Brand equals to BRAND1' and 'Discount equals to false AND Sale price greater than GBP 25.00'. On the right, a list of widget positions is shown, each with a '1' and a plus sign. A purple arrow points from the 'Rule settings' panel to the first widget position. A tooltip explains: 'Drag and drop a rule to apply it to this widget position, or leave this widget position blank to show the default set of products returned from the stack of algorithms (defined for the widget selected previously)'. Below the tooltip are three dashed boxes, each containing the text: 'Drag & drop rule or Leave blank for default.'

4. You can add more than one rule to the same merchandising campaign, if you want to apply different rules to different positions in the same widget. For example, you can apply rules for 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, click **Add new rule**.

Recommendation rules

Create and configure rules to be applied to the recommendations in your widget.

You can apply a rule to any number of positions in the widget: simply edit a rule and drag and drop it to the desired widget positions.

The interface shows three rule settings panels, each with a 'Product source' dropdown set to 'Default' and an 'Edit expression' button. To the right, three widget positions are shown, labeled 1, 2, and 3. A dashed box highlights position 3, with a tooltip that says 'Drag & drop rule or Leave blank for default.' At the bottom left, there is a '+ Add new rule' button with a mouse cursor pointing to it.

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 generates the recommendations according to the personalized strategy configured in the Episerver back end, and then filters them using the recommendation rules in the Merchandising campaign.

Select **Handpick** for campaigns where you want to override the Episerver algorithms output with your own product selection. Then you can use the

refCodes or **Product set** criteria in your rule to specify a product SKU or group of products to display.

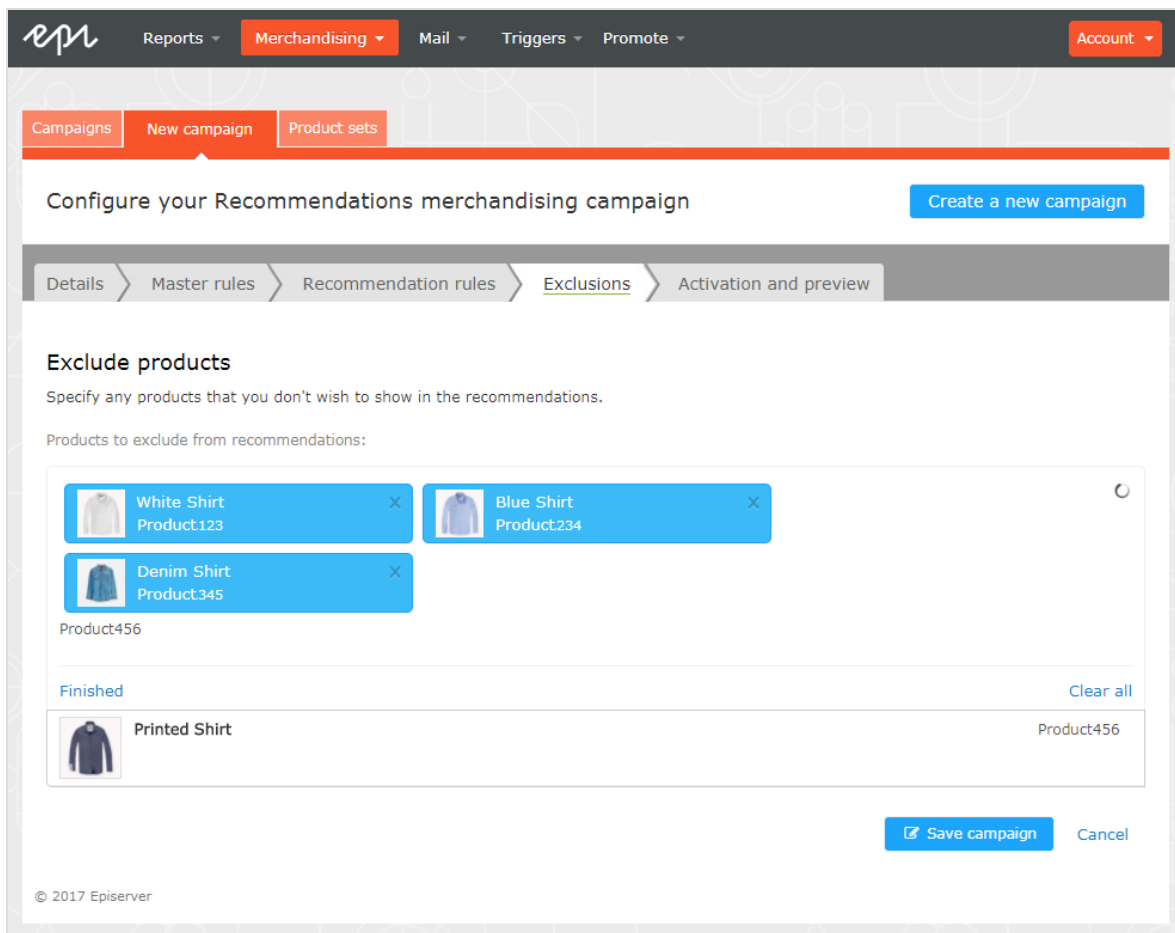
5. Save your campaign.

Applying exclusions

Exclusions are optional.

This feature lets you specify products that you do not want to show in the widget specified in the merchandising campaign (in the **Details** tab). For example, you set up a recommendation rule to 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** after you have added your exclusions.



Activating and previewing

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

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

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

Date and time

Specify when this campaign will run.

Start:

End:

Time zone: Europe/London

Advanced options

[Select all](#) [Clear selected](#)

Monday Tuesday Wednesday Thursday

Friday Saturday Sunday

Preview recommendations

To display a preview of the recommendations shown by this campaign, you need to specify what your imaginary user is viewing. For recommendations shown on a category page, specify the category viewed; for all other pages, specify the product(s) viewed. For home page recommendations, you do not need to specify anything.

Products viewed:

Category viewed:

© 2017 Episerver

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.

The screenshot displays the Episerver Perform Recommendations user interface. At the top, there is a navigation bar with the Episerver logo and several menu items: Reports, Merchandising (highlighted), Mail, Triggers, and Promote. On the right side of the navigation bar, there is a search bar and an Account dropdown menu. 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 the heading is a table with the following columns: Campaign name, Page type, Widget alias, Start date, End date, and Edit - Status - Delete - Copy. The table contains three rows of campaign data. A tooltip labeled "Activate it" is visible over the status icon of the "Exclude Product" campaign.

Campaign name	Page type	Widget alias	Start date	End date	Edit - Status - Delete - Copy
Casual trousers	Home page		05-Aug-2017	-	[Edit] [Status] [Delete] [Copy]
Exclude Product	Home page		17-Oct-2017	31-Oct-2017	[Edit] [Status] [Delete] [Copy] Activate it
Product Page Promotion	Product page		27-Sep-2017	-	[Edit] [Status] [Delete] [Copy]

© 2017 Episerver