Digital Experience Cloud

Episerver Perform

User Guide

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Episerver Perform User Guide 19-1

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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 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.

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Accessing the Merchandising interface

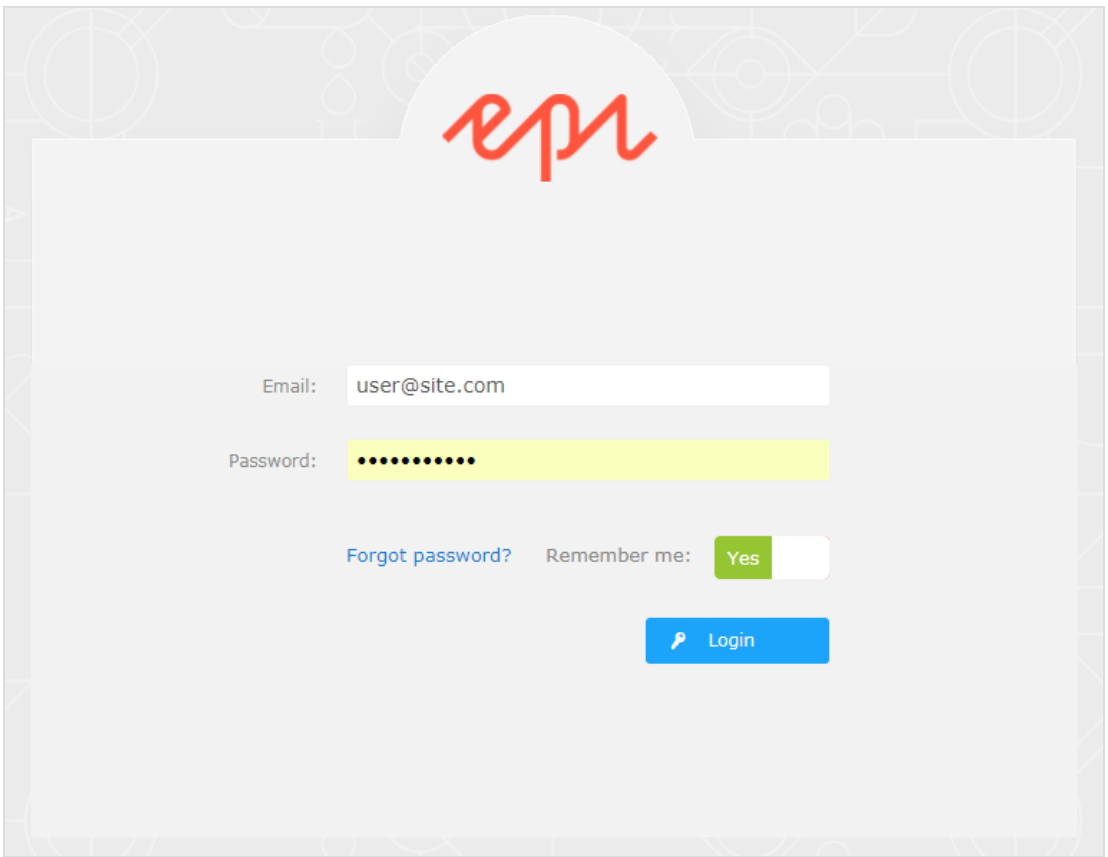
The Merchandising interface is available in the Episerver web-based for the Personalization Portal.

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 developersupport@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.

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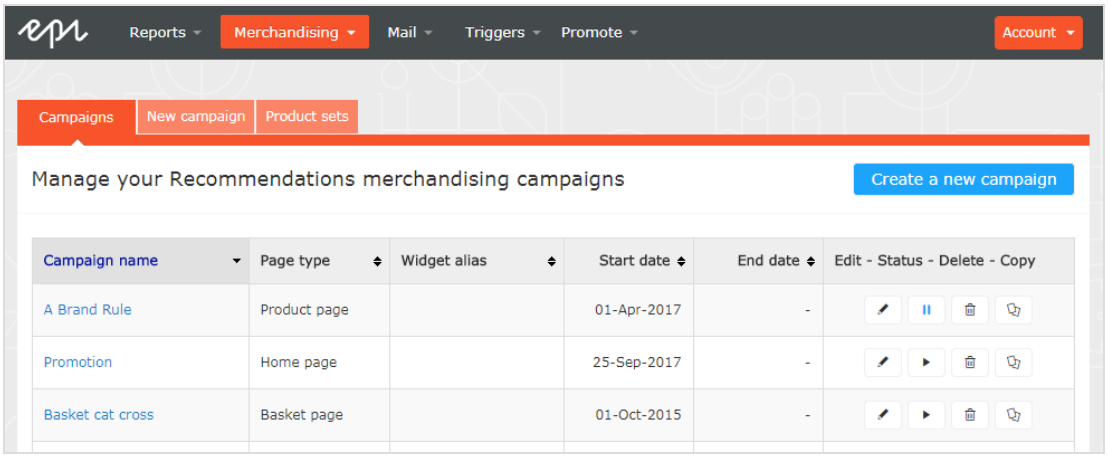

4. Click **Create a new campaign** to start setting up a new campaign. See Setting up a Mail campaign (in the Mail user guide) or Setting up a Merchandising campaign.
5. To edit an existing campaign, click the campaign name or **Edit** next to it.

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Setting up a Merchandising campaign

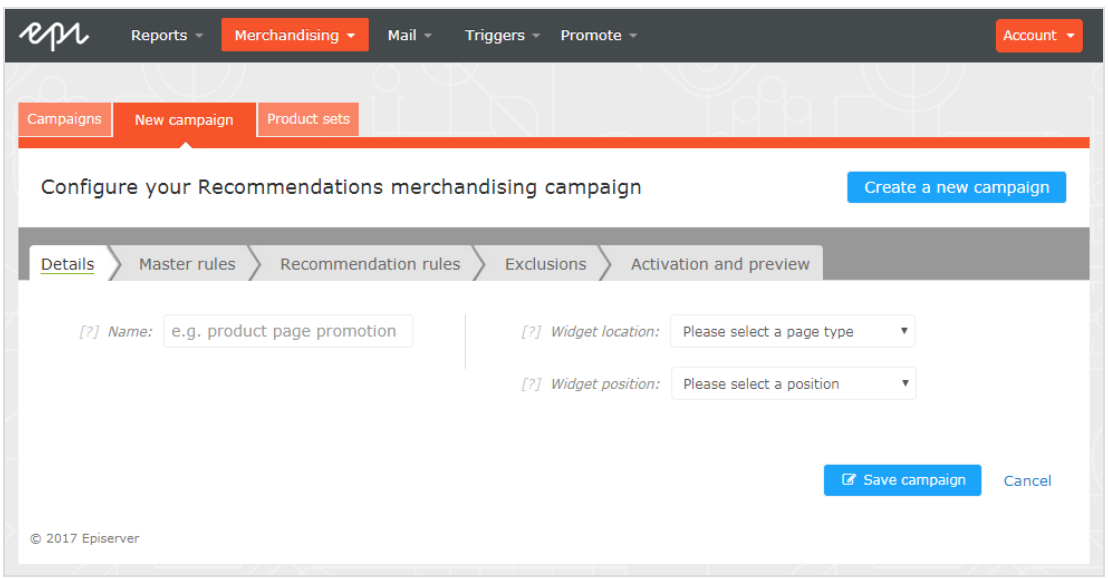
To create a new merchandising campaign, click **Create a new campaign** from the Merchandising overview screen, or select the **Merchandising > New campaign** tab. The campaign editing screen appears. The set-up process involves the following steps:

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.

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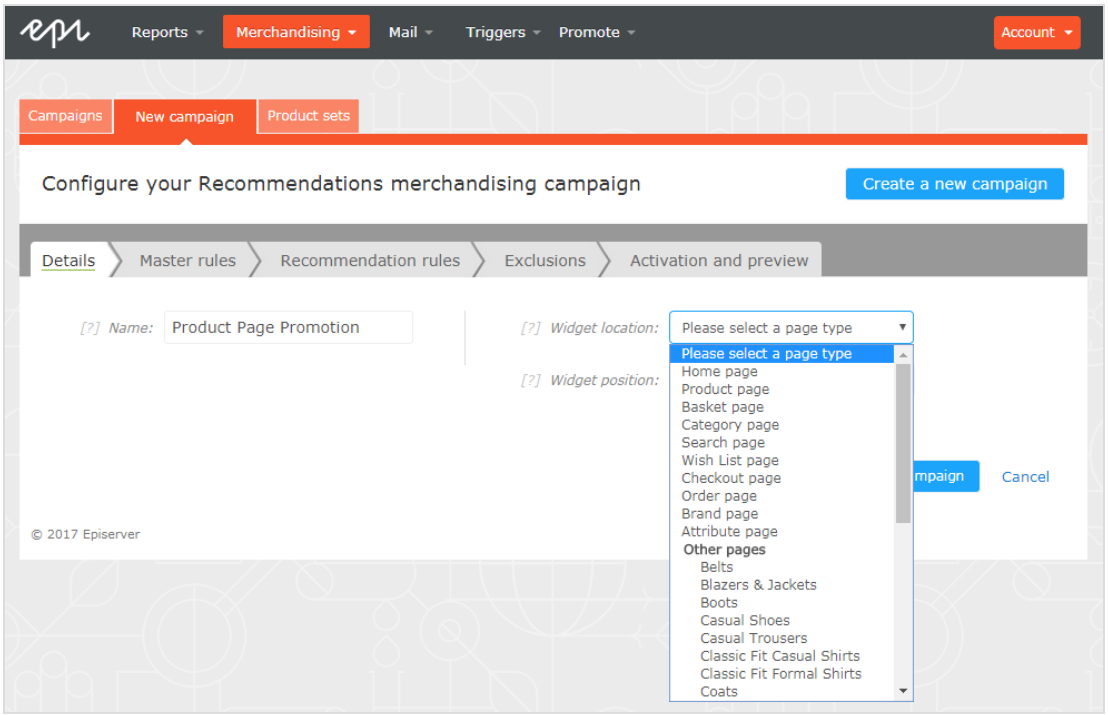
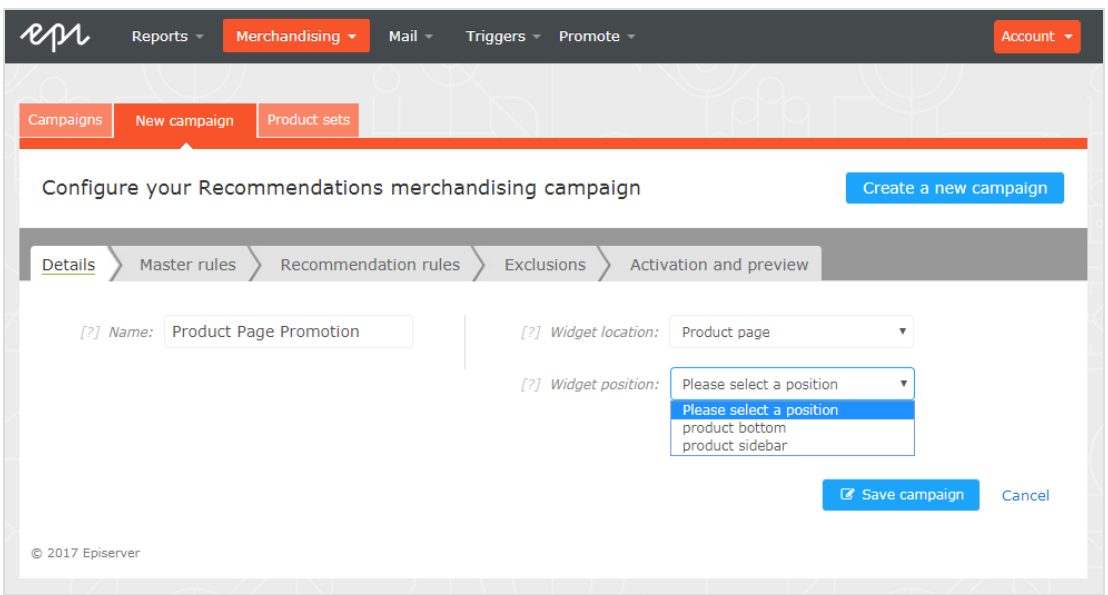


3. Select the widget you want this campaign to be applied to. The widget position drop-down lists available widgets on the selected destination page.



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.
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.

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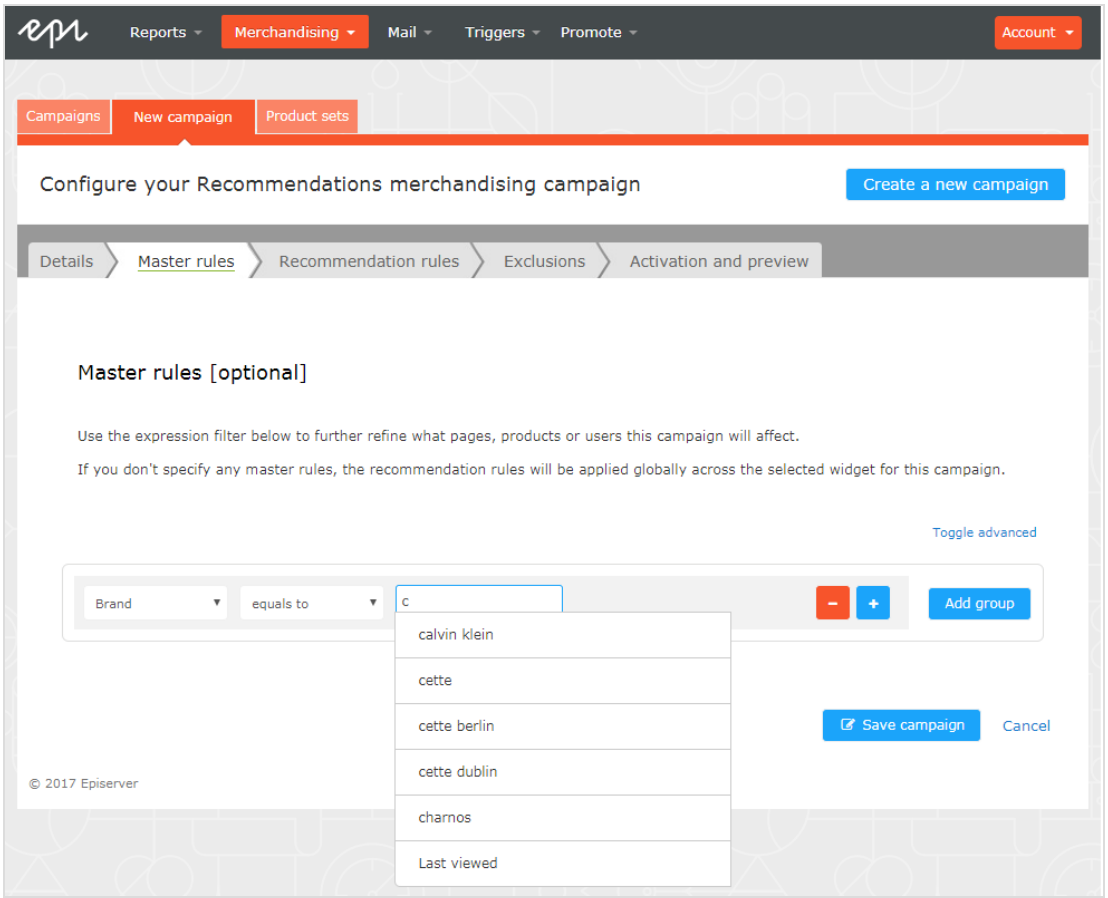

Note: You can add multiple rules by clicking the **Add group** or **+**. When using multiple rules you can choose how you want them to interact by setting the **AND** or **OR** operator.

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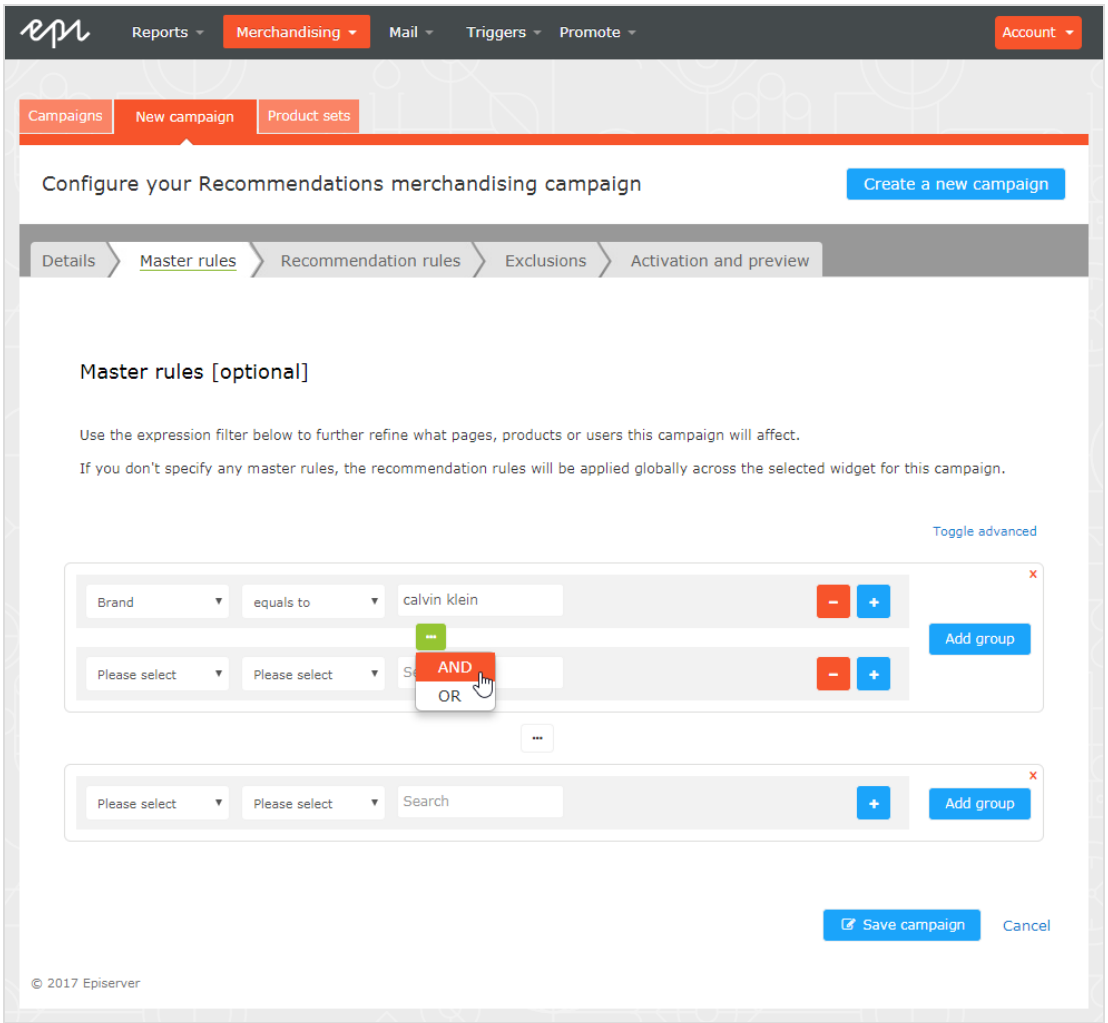

Note: To remove a rule, click minus **-** next to it.

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.

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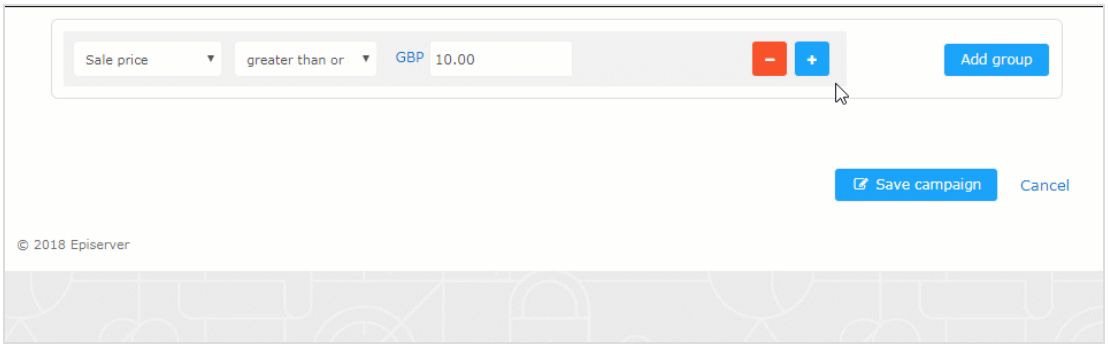
1. Click **Edit expression**.
2. You can add the required criteria for the recommendations in the same way as you would for a Master rule. You also can add more than one criterion in the same rule by using **+** and **Add group**, and the **AND** and **OR** operators.



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**.

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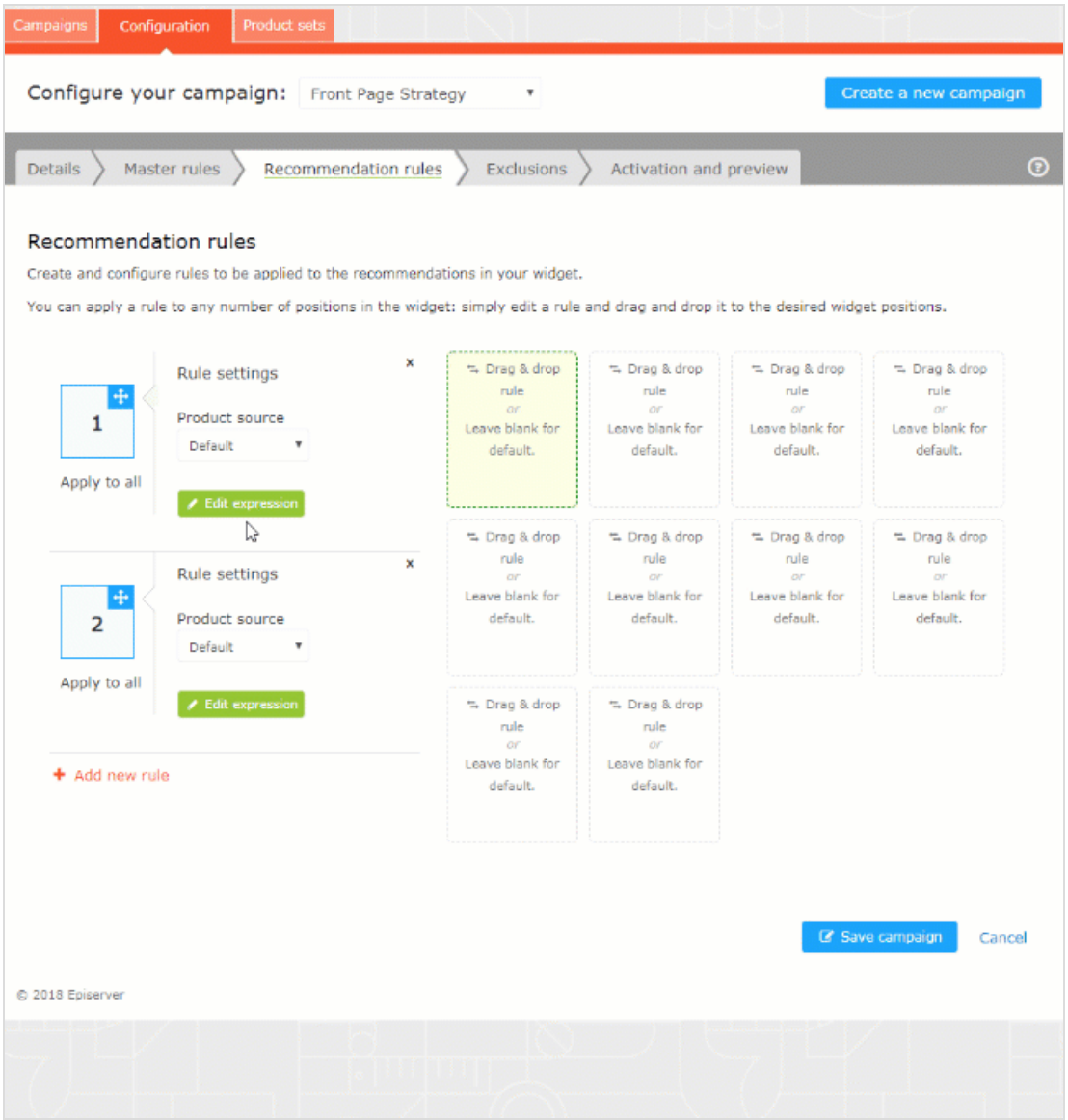

4. You can add more than one rule to the same merchandising campaign, if want to apply different rules to different positions in the same widget. For example, you can apply rules for the first product to have a price over 25.00, the second product between 15.00 and 25.00, and the third product under 15.00. To add another rule, click **Add new rule**.

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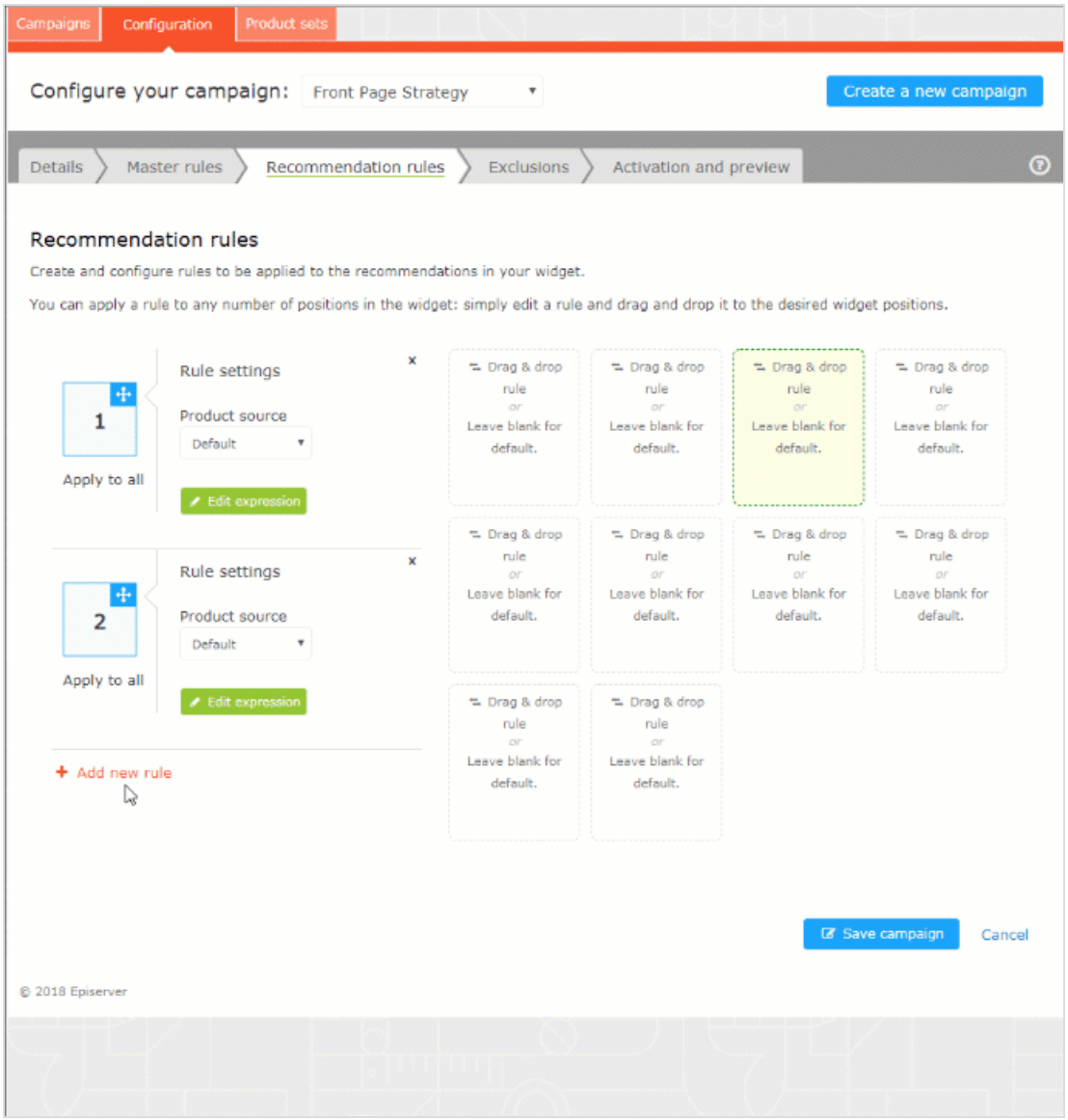

The **Product source** in the **Rule settings** determines whether the rule should be applied on top of the personalized algorithms or override them. For most campaigns, keep the source as **Default**, which generates the recommendations according to the personalized strategy configured in the Episerver 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.

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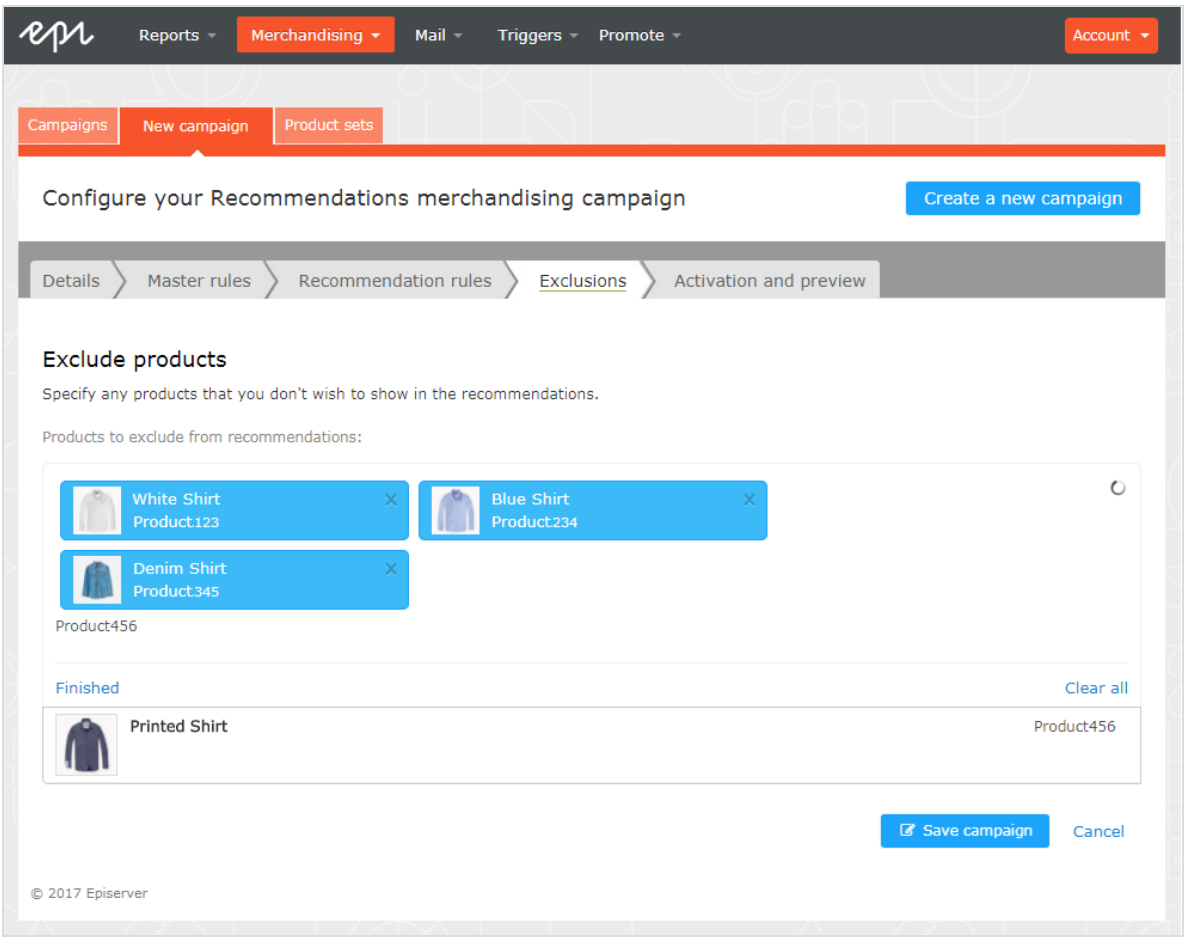
5. Save your campaign.

Applying exclusions

Exclusions are optional.

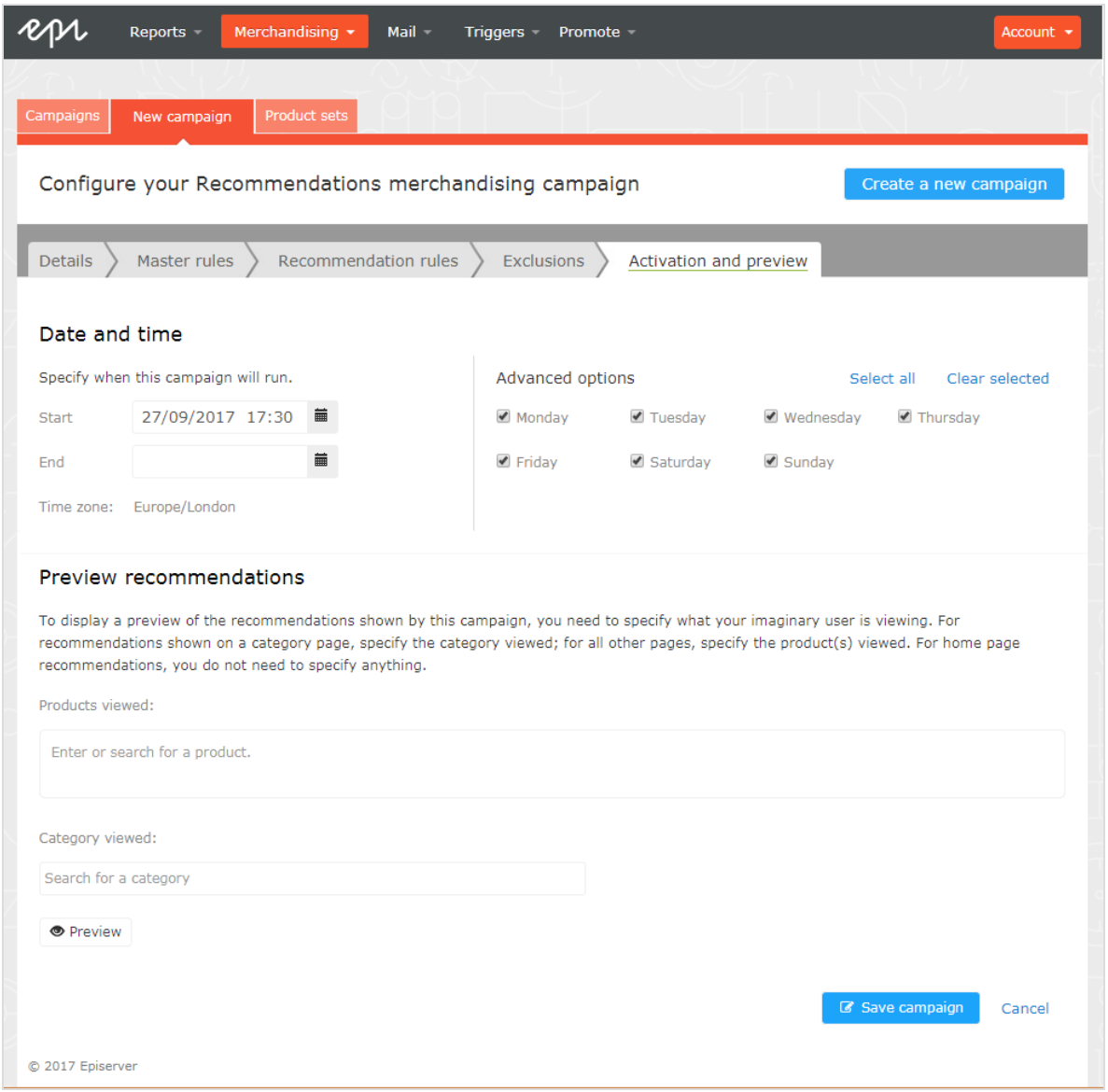
This feature lets you specify products that you do not want to show in the widget specified in the merchandising campaign (in the **Details** tab). For example, you set up a recommendation rule to show products from a specific brand, BRAND1, but there are some products from BRAND1 that you actually do 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.



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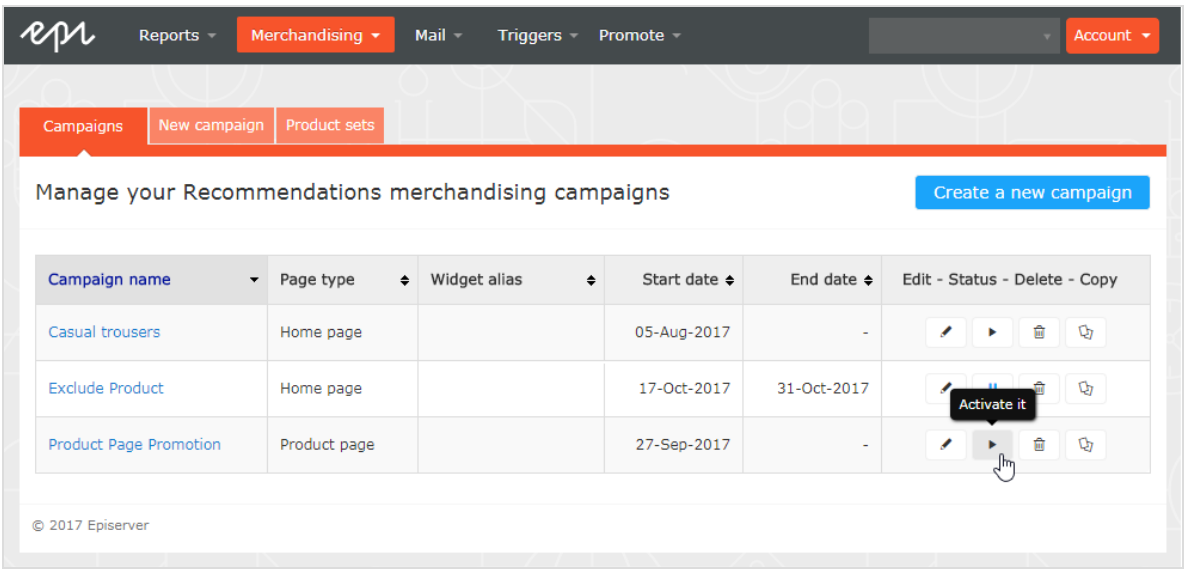
When a campaign is ready, click **Save campaign** and return to the **Campaigns** tab. New campaigns are inactive by default, so find your campaign and click **Play** ▶ to activate it. You can pause/deactivate a campaign in the same way. Changes are applied immediately to your site.



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Recommendation reports

This topic shows analytic reporting for Episerver Personalization. Analytic reports let you see the success of your campaigns, and which Personalization efforts work or do not work.

The reporting functionality in Episerver Personalization covers a variety of useful information.

Perform users and administrators can track and graphically monitor the following items:

- Total orders, revenue, and products sold
- Order, revenue and products sold through recommendations
- Average order value and units per order uplifts with recommendations
- Best Performing pages
- Best Performing Widgets

Attribution Model

The Episerver Perform Attribution model is the industry standard. If a visitor visits your site and clicks on a Perform recommendation, and then returns to the site within 30 days and buys the product they clicked and converted on, then full attribution for the conversion is given to Perform.

Example

If a visitor engages with a recommendation, returns to the site and purchases the item, plus other items they were not recommended, Episerver Perform is only attributed the revenue generated solely from the item recommended to the visitor and that they engaged with (clicked on) and not the entire basket value. For example: A visitor is recommended a T-shirt for $5.50 while browsing the site. The visitor clicks on the recommended T-shirt, however they leave the site without purchasing. The visitor returns later that day and purchases 2 of the T-shirts they were recommended and engaged with. They also purchase a Jumper for $14 that they were not recommended. The order total is $25 and the total revenue attributed to Perform would be $11 (which is 2 T-shirts at $5.50 each). If the visitor buys multiple units of the same item that was recommended to them and they clicked on, this collective sum will be attributed to Perform. Equally, if it was just one item, the sole value of that one item will be attributed to recommendations.

Perform can produce a graph that plots attribution against time. This shows when most people convert after being shown a recommendation. The metrics used are CPC (Click to purchase conversion) against time. On average, 85% of conversions occur within 24 hours.

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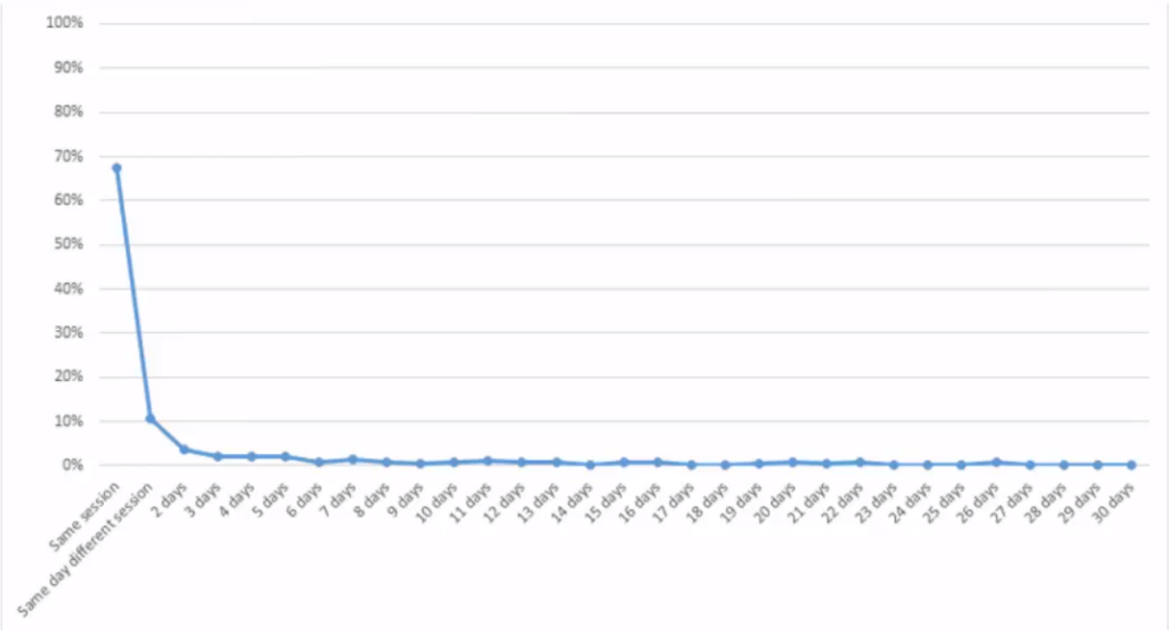

Orders tab

The **Orders** tab shows orders from online channels tracked by Episerver Personalization.

From the **Reports** tab, select **Recommendations**, then click on the **Orders** tab.

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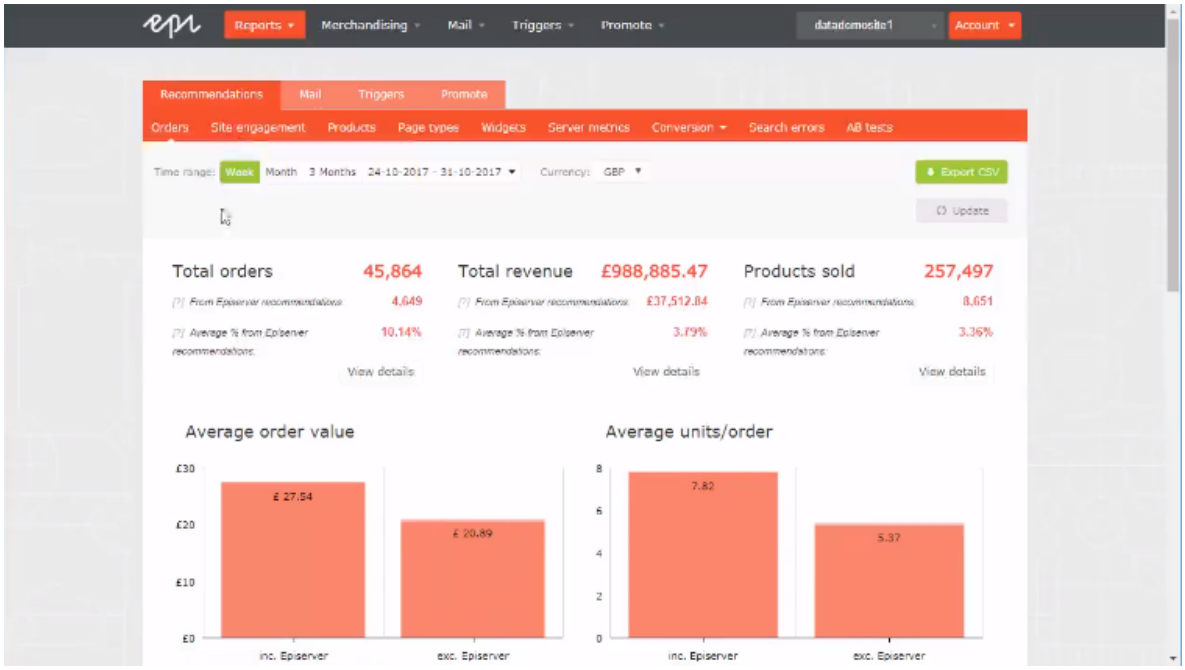

- **Time range**. At the top of the page you can choose the time range for the reports. **Week** is the default selection, which shows information from the past 7 days. You can also choose **Month**, **3 Months** or a custom time range. When you change the time range, click **Update** to refresh the results.
- **Currency**. Select the currency you would like to report on.
- **Export CSV**. You can export any of the reports you are viewing to a CSV file by clicking **Export CSV**.
- **Total orders**. Shows the total number of transactions tracked on the site as two units of measurement.

    - **Episerver Recommendations**. The number of orders in which an Episerver recommendation was purchased.
    - **Average percentage from Episerver recommendations**. The percentage of orders in which an Episerver recommendation was purchased.

- **Total revenue**.

    - **From Episerver recommendations**. Shows the revenue generated from products bought through recommendations, which is measured by totalling the unit value of products clicked and purchased via recommendations.
    - **Average % from Episerver recommendations**. Shows the percentage of total revenue from Episerver recommendations.

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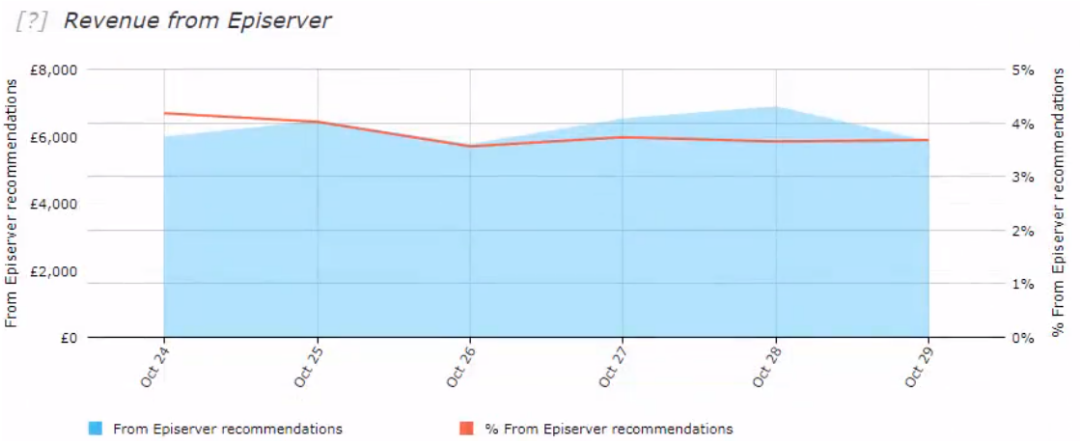
- **Products sold**. Shows the total number of units sold on the site.
    - **From Episerver recommendations**. Shows the revenue generated from products bought through recommendations.
    - **Average % from Episerver recommendations**. Shows the average percentage of products sold from Episerver recommendations.
- **Average order value**. Shows the average value of orders that contained an Episerver recommendation compared to those that did not over the period.
- **Average units/order**. Shows the average number of units purchased in orders that contained an Episerver recommendation compared to those that did not.
- **Recommendation revenue from Episerver**. Shows a graphical view of the total revenue from recommendations (left-hand axis), and % of recommendation revenue (right-hand axis), with the time period on the base line, to monitor the peaks and troughs in behavior.



- **Orders data table**. Shows revenue and products shown in a table. You can organize orders, revenue, and products sold by the following columns.

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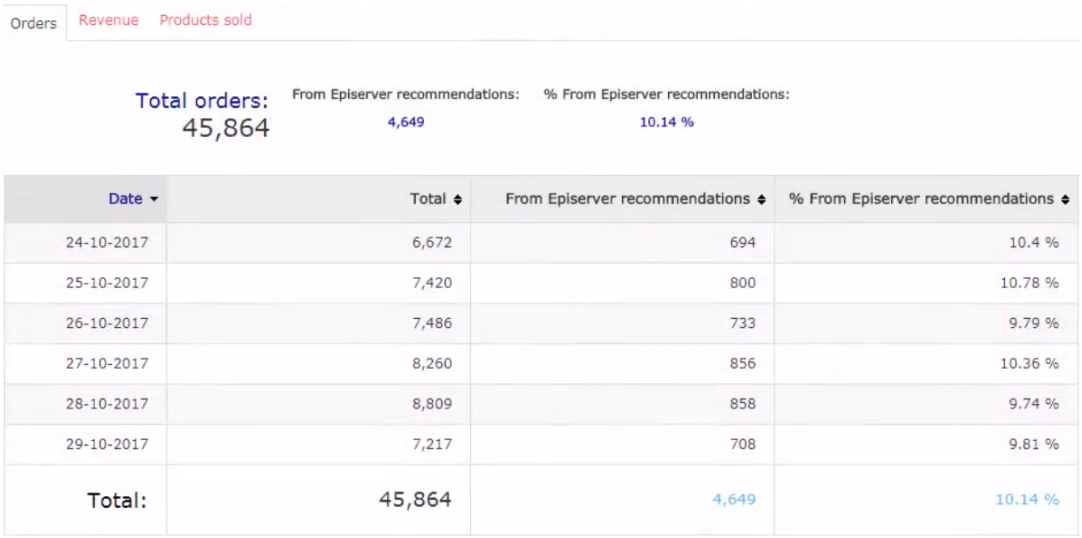

Date	Total	From Episerver recommendations	% From Episerver recommendations
24-10-2017	6,672	694	10.4 %
25-10-2017	7,420	800	10.78 %
26-10-2017	7,486	733	9.79 %
27-10-2017	8,260	856	10.36 %
28-10-2017	8,809	858	9.74 %
29-10-2017	7,217	708	9.81 %
Total:	45,864	4,649	10.14 %

- date
- total number of tracked transactions, revenue or units sold for that date
- total number of orders, revenue, or units sold, that contain or were sold through an Episerver recommendation
- the percentage of orders or products sold that contain an Episerver recommendation

Site engagement tab

The Site Engagement tab shows page impressions, clicks, and click through rates (CTRs) for recommendations across your site.

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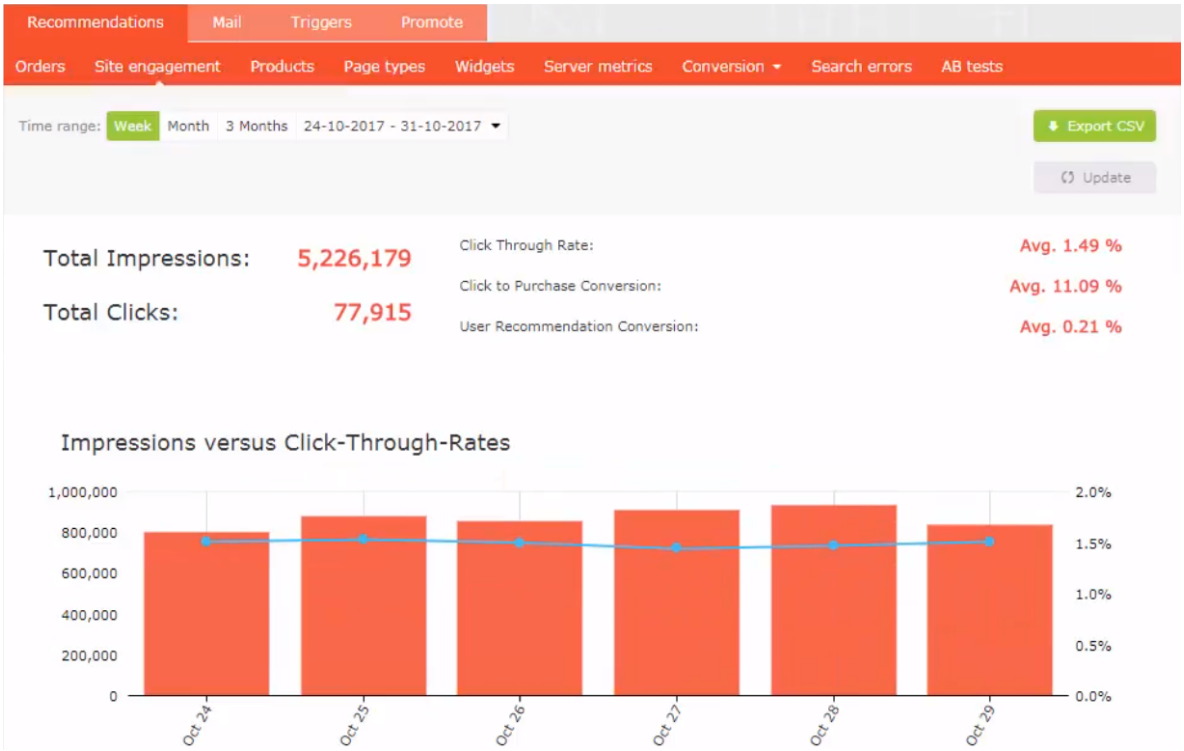

- Total impressions. Shows the total number of page impressions where recommendations were served.
- Total clicks. Shows the total number of clicks that have occurred on recommendations.
- Click through rate. Shows a percentage and is worked out on the sum of clicks divided by the sum of impressions.
- Click to purchase conversion. Shows a percentage, and calculated on the sum of purchased recommended products divided by sum of clicks.
- User recommendation conversion. Shows the number of unique visitors who purchased a recommendation, compared to the number of unique visitors who viewed a recommendation, again shown as a percentage.
- Impressions versus click through rates. Shows a graphical representation of this information. The bars show the daily total number of page impressions with recommendations, and the line shows the daily click through rate for recommendations.

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- **Site Engagement data table**. You can organize the data by the following columns.

Date	Impressions	Clicks	CTR	CTP	URC
24-10-2017	804,136	12,124	1.51 %	11.45 %	0.21 %
25-10-2017	877,334	13,393	1.53 %	11.11 %	0.22 %
26-10-2017	858,335	12,875	1.5 %	10.4 %	0.21 %
27-10-2017	909,440	13,057	1.44 %	11.5 %	0.23 %
28-10-2017	936,594	13,795	1.47 %	11.69 %	0.22 %
29-10-2017	840,340	12,671	1.51 %	10.38 %	0.2 %
Total:	5,226,179	77,915	1.49%	Avg. 11.09%	0.21 %

  - Date
  - Total number of impressions
  - Total number of clicks
  - Percentage of recommendations that were clicked
  - Percentage of purchased recommendations after having been clicked on
  - Percentage of unique visitors who purchased from recommendations versus unique visitors who saw recommendations

Products tab

The Products tab shows the best-selling products on the site based on the revenue generated from recommendations.

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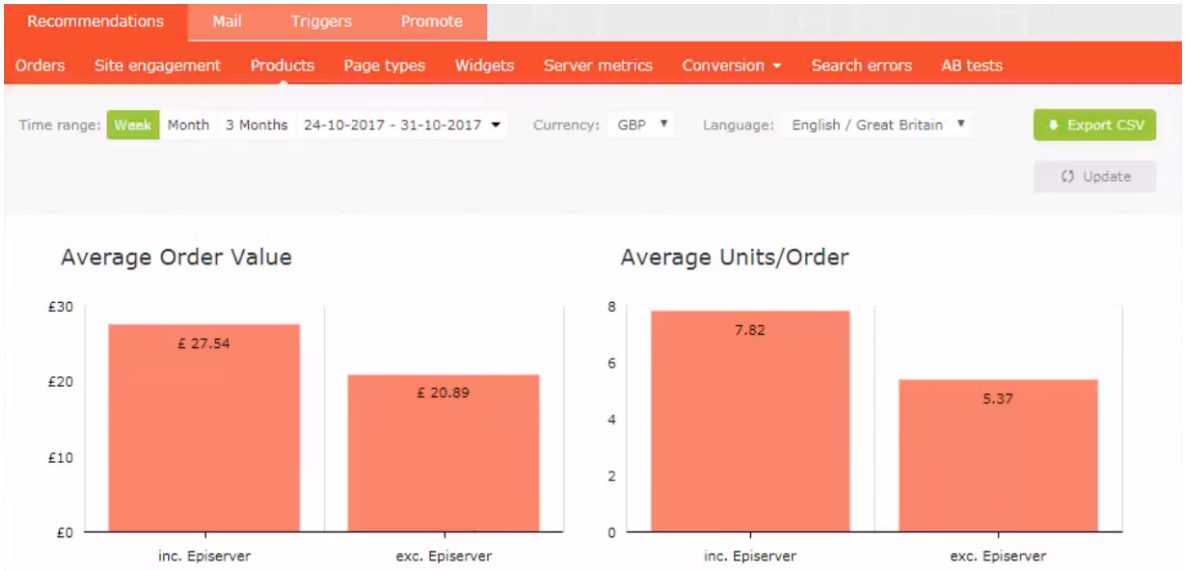
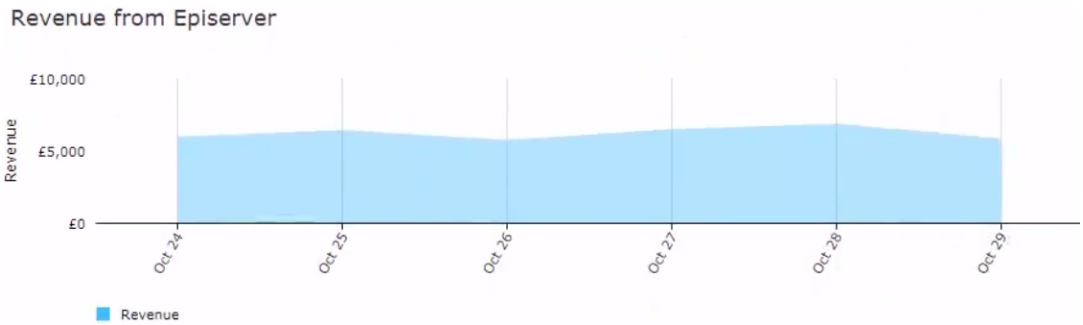


- **Average order value**. Shows the average order value of orders that contained an Episerver recommendation compared to those that did not over the specified period.
- **Average units/order**. Shows the average number of units purchased in orders that contained an Episerver recommendation, compared to those that did not, again over the specified period.
- **Revenue from Episerver**. Shows revenue generated from Episerver recommendations on a daily basis through the time period, providing a visual to see trends in behaviour.



- **Best-selling products data table**. The table in the portal shows the top 10 products. However, you can export a full list by clicking **Export CSV**. You can organize the data by the following columns.

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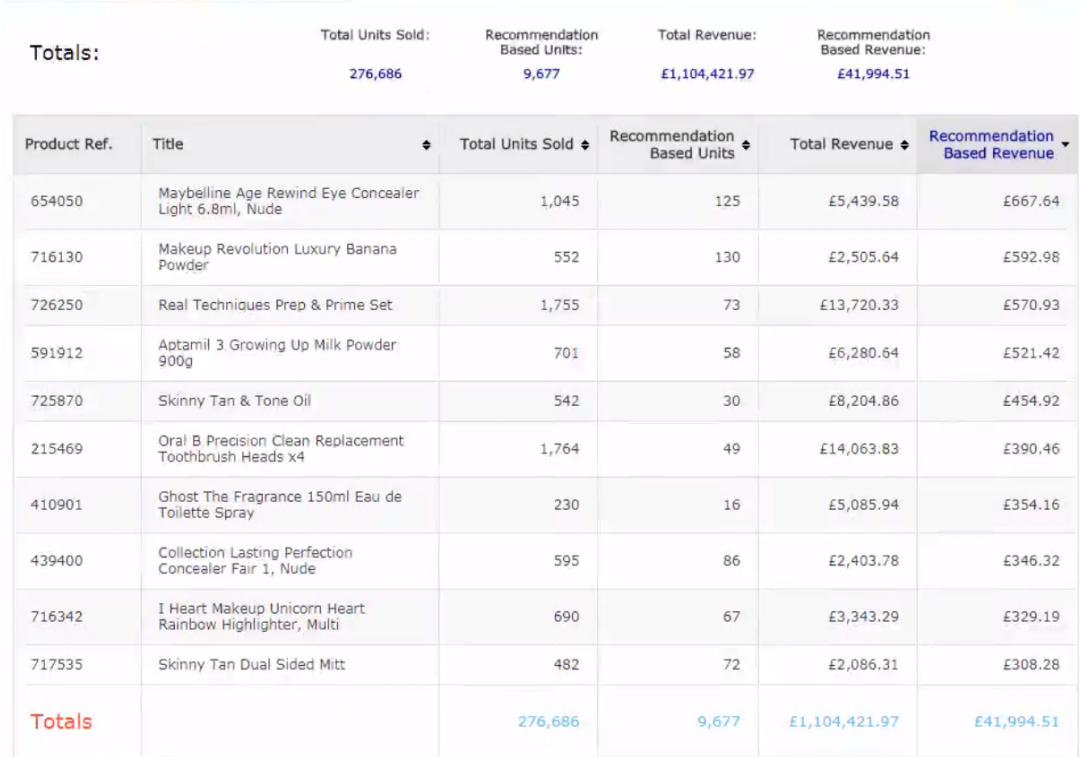

Totals:	Total Units Sold:	Recommendation Based Units:	Total Revenue:	Recommendation Based Revenue:
	276,686	9,677	£1,104,421.97	£41,994.51

Product Ref.	Title	Total Units Sold	Recommendation Based Units	Total Revenue	Recommendation Based Revenue
654050	Maybelline Age Rewind Eye Concealer Light 6.8ml, Nude	1,045	125	£5,439.58	£667.64
716130	Makeup Revolution Luxury Banana Powder	552	130	£2,505.64	£592.98
726250	Real Techniques Prep & Prime Set	1,755	73	£13,720.33	£570.93
591912	Aptamil 3 Growing Up Milk Powder 900g	701	58	£6,280.64	£521.42
725870	Skinny Tan & Tone Oil	542	30	£8,204.86	£454.92
215469	Oral B Precision Clean Replacement Toothbrush Heads x4	1,764	49	£14,063.83	£390.46
410901	Ghost The Fragrance 150ml Eau de Toilette Spray	230	16	£5,085.94	£354.16
439400	Collection Lasting Perfection Concealer Fair 1, Nude	595	86	£2,403.78	£346.32
716342	I Heart Makeup Unicorn Heart Rainbow Highlighter, Multi	690	67	£3,343.29	£329.19
717535	Skinny Tan Dual Sided Mitt	482	72	£2,086.31	£308.28
Totals		276,686	9,677	£1,104,421.97	£41,994.51

- Product code used to identify the product
- Title of the product
- Total number of units sold on the site
- Number of units purchased through recommendations
- Total revenue of the product on the site
- Total revenue of the product through recommendations

Page Types tab

The Page Types tab shows page types on the site where recommendations are served, and how much recommendations revenue is generated from each page.

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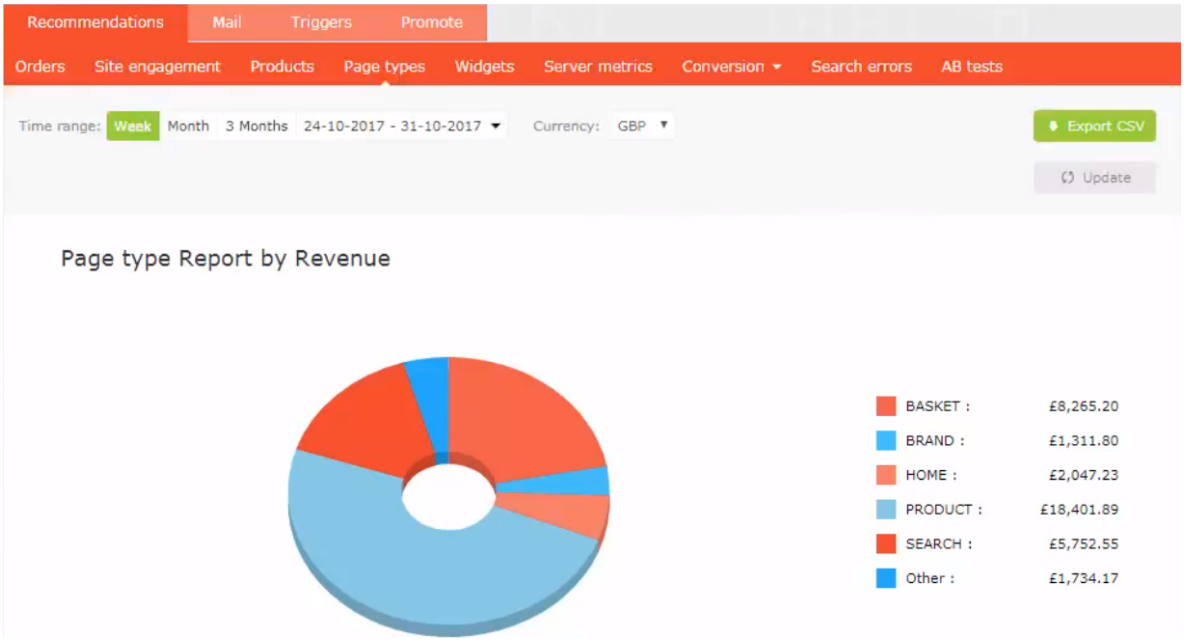

- **Page type report by revenue**. A pie chart shows which page types are generating the most recommendations revenue.
- **Page Type data table**. You can organize the data by the following columns.

Totals:	Impressions:	Clicks:	Items bought:	Revenue:
	4,959,221	73,580	8,651	£37,512.84

Page type	Impressions	Clicks	CTR	Items bought	CTP	Revenue
Basket	659,889	9,253	1.40%	2,314	25.01%	£8,265.20
Brand	42,834	752	1.76%	358	47.61%	£1,311.80
Category	957,380	1,076	0.11%	133	12.36%	£515.85
Favourites	0	0	0.00%	1	0.00%	£3.49
Home	763,631	5,174	0.68%	344	6.65%	£2,047.23
My Account	0	0	0.00%	80	0.00%	£409.76
My Account B	0	0	0.00%	20	0.00%	£97.50
Order Confirmation	39,593	803	2.03%	202	25.16%	£665.84
Product	1,776,982	48,996	2.76%	3,954	8.07%	£18,401.89
search	710,936	7,421	1.04%	1,237	16.67%	£5,752.55
Wish List	7,976	105	1.32%	8	7.62%	£41.73
Totals	4,959,221	73,580	1.48	8,651	11.76	£37,512.84

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- Page type names where recommendations are present
- Number of impressions for that page type
- Number of clicks on recommendations for that page type
- Click through rate (CTR) for recommendations, which is shown as a percentage, calculated by sum of clicks divided by sum of impressions
- Items Bought shows the number of items purchased through recommendations on that page type
- Click to Purchase (CTP) rate for recommendations shows a percentage, calculated by sum of purchased recommended products divided by sum of clicks
- Revenue generated from recommendations on each page type.

Widgets tab

The widgets reporting page is similar to the Page type report, but with finer detail for individual widgets, because some pages may have more than one widget.

- **Widget report by revenue**. The pie chart presented to visitors shows which widgets are generating the most revenue.

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- **Widget data table**. Shows similar information as Page Types, except based at the widget level. Click on a widget name to see the individual position performance details within a widget. You can organize the data by the following columns.

Widget	Impressions	Position	Clicks	CTR	Items Bought	CTP	Revenue
favourite	308	-	15	4.87%	1	6.67%	£3.49
wishlist	2,705	-	33	1.22%	3	9.09%	£7.77
ab_wishlist	5,669	-	80	1.41%	5	6.25%	£33.96
orderjson Mobile	5,912	-	88	1.49%	7	7.95%	£36.80
myAccountjson 5recs B	4,850	-	59	1.22%	20	33.90%	£97.50
Home Bottom New	92,021	-	705	0.77%	25	3.55%	£133.88
categoryjson	322,922	-	359	0.11%	37	10.31%	£151.69
ab_orderjson Mobile	13,563	-	230	1.70%	35	15.22%	£158.29
myAccountjson	10,617	-	107	1.01%	47	43.93%	£204.85
myAccountjson Mobile	13,303	-	159	1.20%	33	20.75%	£204.91
orderjson	7,180	-	175	2.44%	73	41.71%	£210.72
ab_orderjson	14,278	-	371	2.60%	87	23.45%	£260.03
brand	13,923	-	230	1.65%	42	18.26%	£312.75
ab_categoryjson	691,558	-	790	0.11%	96	12.15%	£364.16
ab_Home Bottom New	203,472	-	1,429	0.70%	76	5.32%	£403.33
Home Bottom Best sellers Mobile	151,824	-	997	0.66%	73	7.32%	£452.04
You may also like	235,797	-	1,546	0.66%	106	6.86%	£465.24

  - Widget
  - Impressions
  - Position
  - Clicks
  - CTR
  - Items bought
  - CTP
  - Revenue

Server Metrics tab

The Server Metrics tab shows two graphs:

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- Number of recommendations served per day

- Average time it takes to generate recommendations and return them to a site (that is after a tracking request is sent)

Conversions > Summary tab

The Conversions tab shows the ranking of products based on their overall conversion and page views on a site. It does not focus on recommendations but can provide easily accessible, actionable insights based on your whole site and all visitors and all orders.

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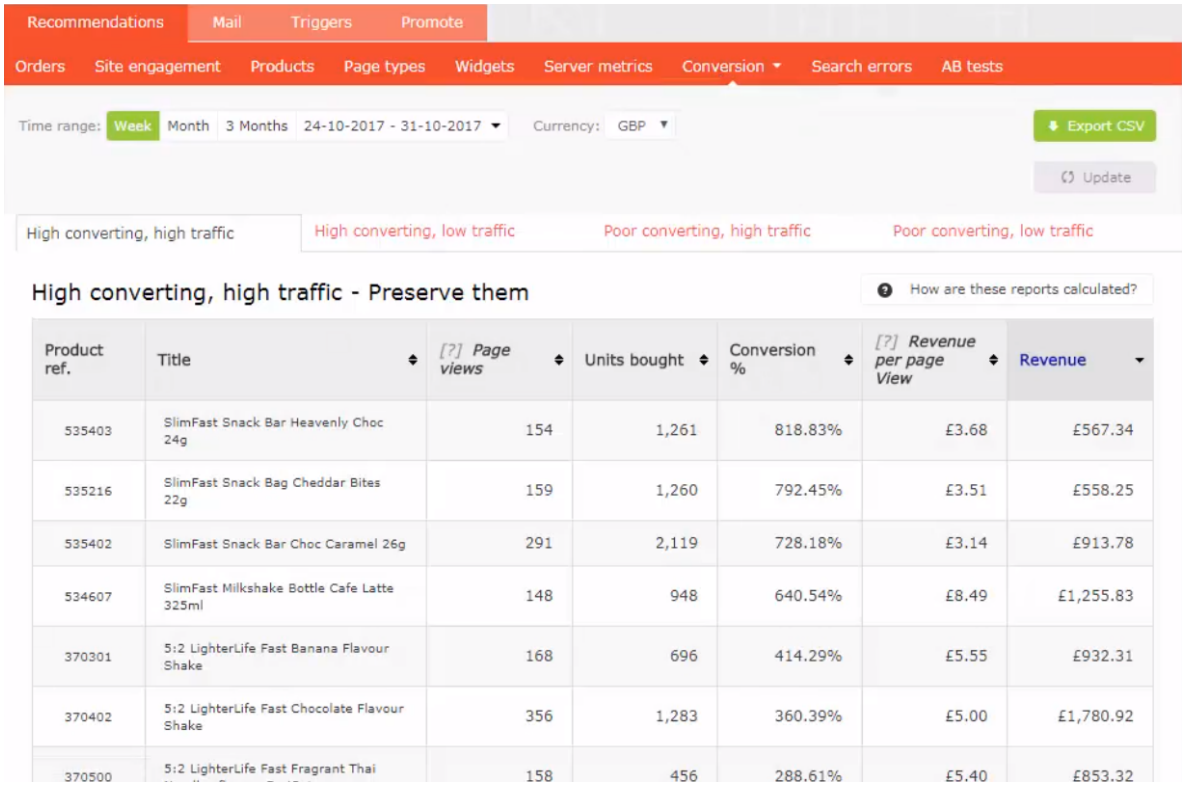

Product ref.	Title	[?] Page views	Units bought	Conversion %	[?] Revenue per page View	Revenue
535403	SlimFast Snack Bar Heavenly Choc 24g	154	1,261	818.83%	£3.68	£567.34
535216	SlimFast Snack Bag Cheddar Bites 22g	159	1,260	792.45%	£3.51	£558.25
535402	SlimFast Snack Bar Choc Caramel 26g	291	2,119	728.18%	£3.14	£913.78
534607	SlimFast Milkshake Bottle Cafe Latte 325ml	148	948	640.54%	£8.49	£1,255.83
370301	5:2 LighterLife Fast Banana Flavour Shake	168	696	414.29%	£5.55	£932.31
370402	5:2 LighterLife Fast Chocolate Flavour Shake	356	1,283	360.39%	£5.00	£1,780.92
370500	5:2 LighterLife Fast Fragrant Thai	158	456	288.61%	£5.40	£853.32

Conversion definitions

- **High converting**. Any product that is in top 10 of the highest 10% of conversions
- **Low converting**. Any product that is in the lowest 10 of the lowest 10% of conversions.

Traffic definitions

- **High traffic**. Any product that is in the top 30% of page views.
- **Low traffic**. Any product that is in the lower 40% of page views, and with the very lowest 10% excluded.

The following list and image shows the various combination views of conversion data.

- **High converting, high traffic**. The best 10 best converting products on the site from the top 30% of products with most page views.
- **High converting, low traffic**. The best 10 best converting products on the site from the 40% of products with the least page views, excluding the 10% of products with the lowest number of page views.

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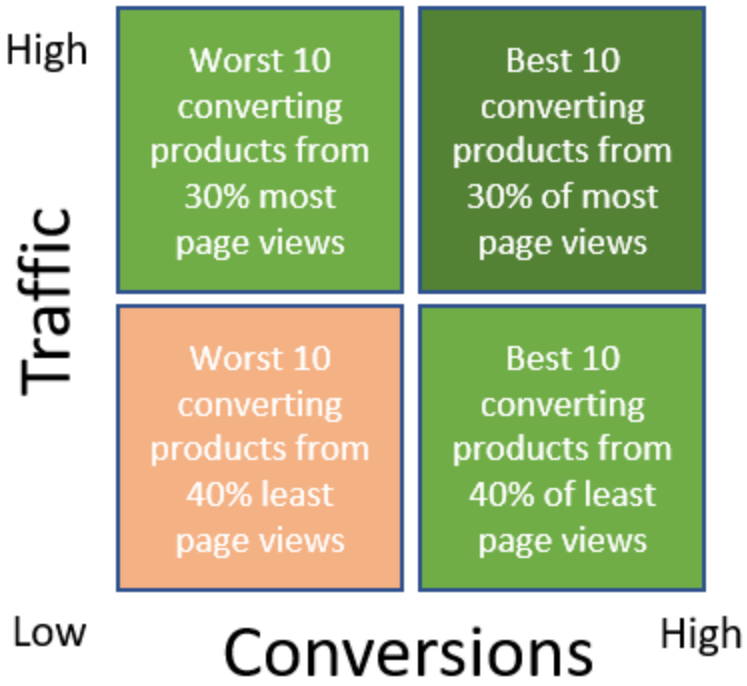
- **Low converting, high traffic**. The worst 10 converting products on the site from the top 30% of products with most page views.
- **Low converting, low traffic**. The worst 10 converting products on the site from the 40% of products with the least page views, excluding the 10% of products with the lowest number of page views is displayed.



Conversions > Rank and trend tab

The Conversion Rank and trend view lets you generate a *Top 5* report of products, categories or brands sold on your site, based on a combination of criteria – best or worst performing by page views, revenue or conversion. The generated report shows data on the total page views, units bought, conversion, revenue per page view and total revenue from all sales on your whole site.

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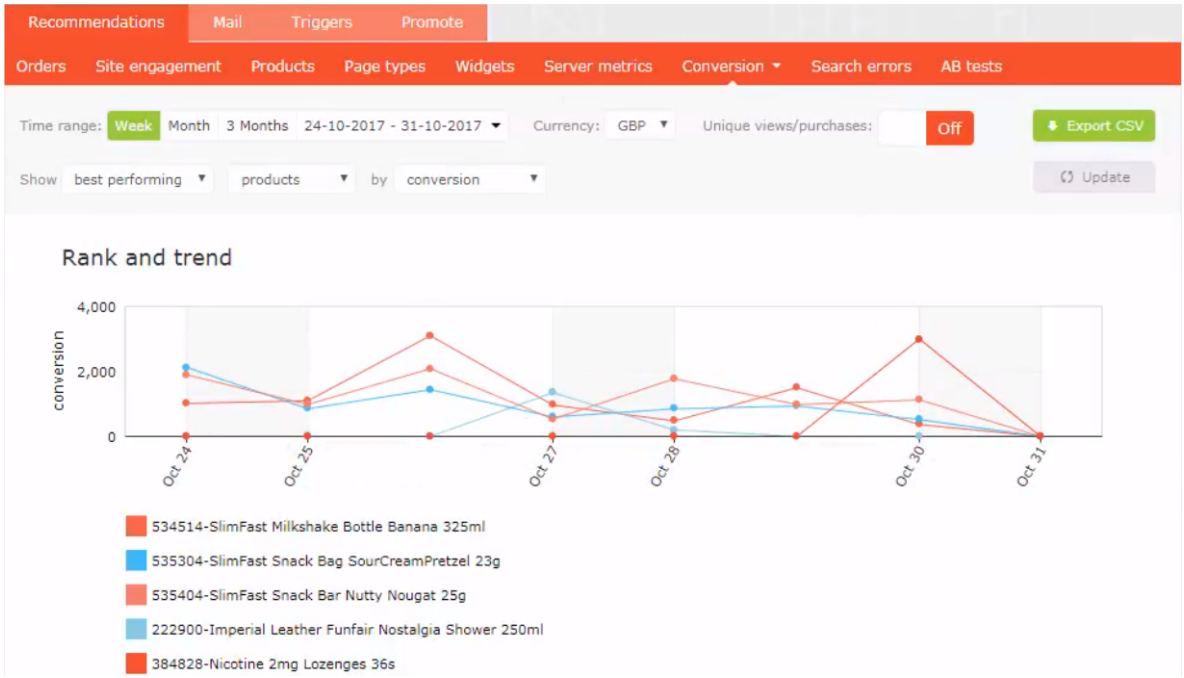

Search errors tab

The Search Errors tab shows the terms used in a site search that returned no results.

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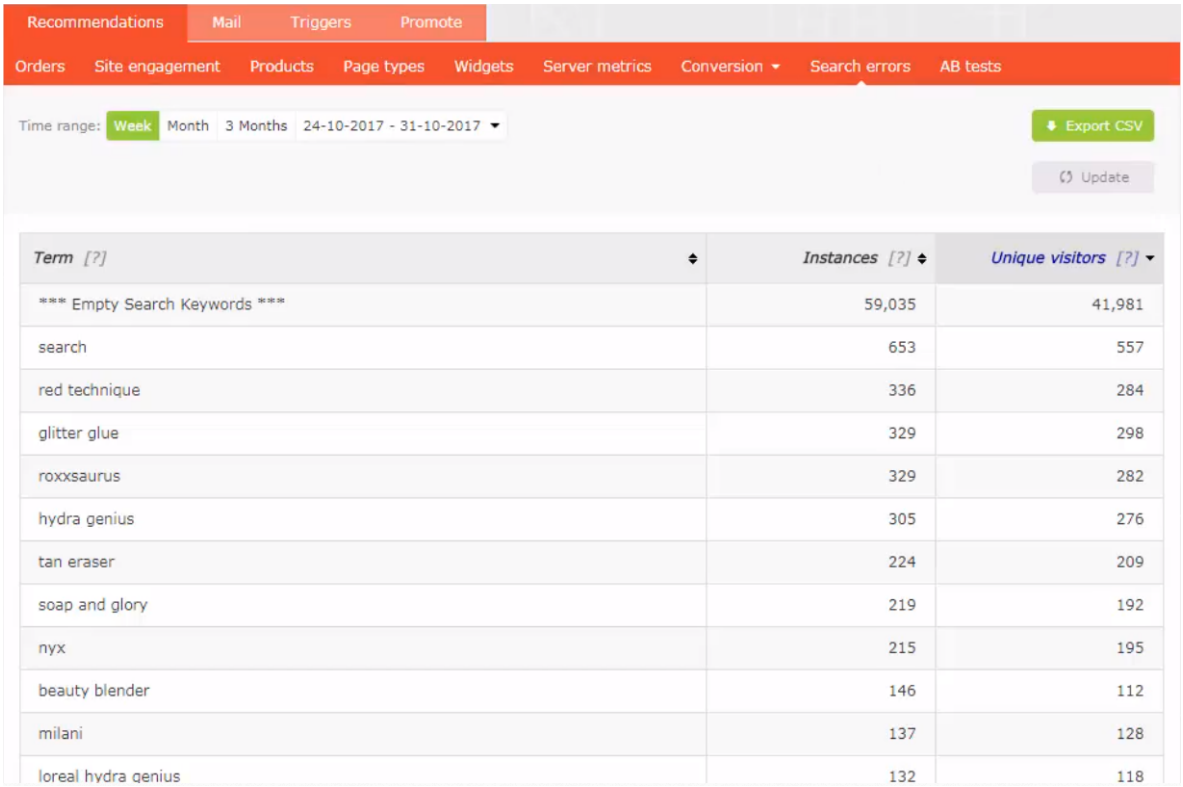

Term [?]	Instances [?]	Unique visitors [?]
*** Empty Search Keywords ***	59,035	41,981
search	653	557
red technique	336	284
glitter glue	329	298
roxxsaurus	329	282
hydra genius	305	276
tan eraser	224	209
soap and glory	219	192
nyx	215	195
beauty blender	146	112
milani	137	128
loreal hydra genius	132	118

You can sort by the following criteria:

- The term that was searched
- The number of times a term was searched
- The number of unique visitors who searched for a term

AB tests tab

The AB tests tab shows the results from the latest Perform A/B test on a site, and past tests.

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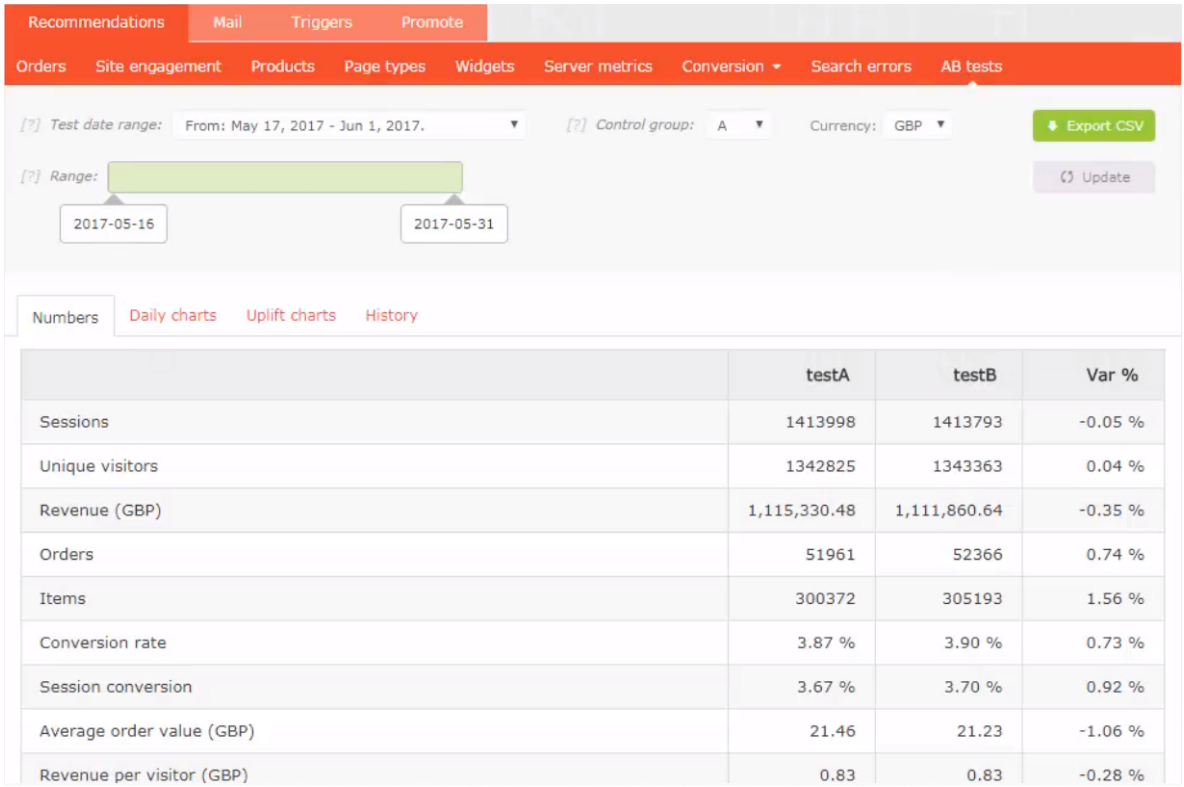

	testA	testB	Var %
Sessions	1413998	1413793	-0.05 %
Unique visitors	1342825	1343363	0.04 %
Revenue (GBP)	1,115,330.48	1,111,860.64	-0.35 %
Orders	51961	52366	0.74 %
Items	300372	305193	1.56 %
Conversion rate	3.87 %	3.90 %	0.73 %
Session conversion	3.67 %	3.70 %	0.92 %
Average order value (GBP)	21.46	21.23	-1.06 %
Revenue per visitor (GBP)	0.83	0.83	-0.28 %

You can do the following in the AB tests view.

- Filter the results to specific dates by selecting the date range from the range bar.
- Set the control group.

  > **Note:** A/B testing supports up to 5 groups so you can view A-to-E testing.

- Select a specific currency that you want to examine.
- In the table you can view and compare key metrics on the site between all test groups, such as:

  - Visitor sessions
  - Site revenue
  - Conversion rate
  - Average order value through average selling price and units per order
  - Recommendation engagement and revenue

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AB tests > Daily tab

The Daily Charts view shows graphs for revenue generated, average conversion rates, average order value, average selling price, through to average number of units sold and number of sessions per day on the site.

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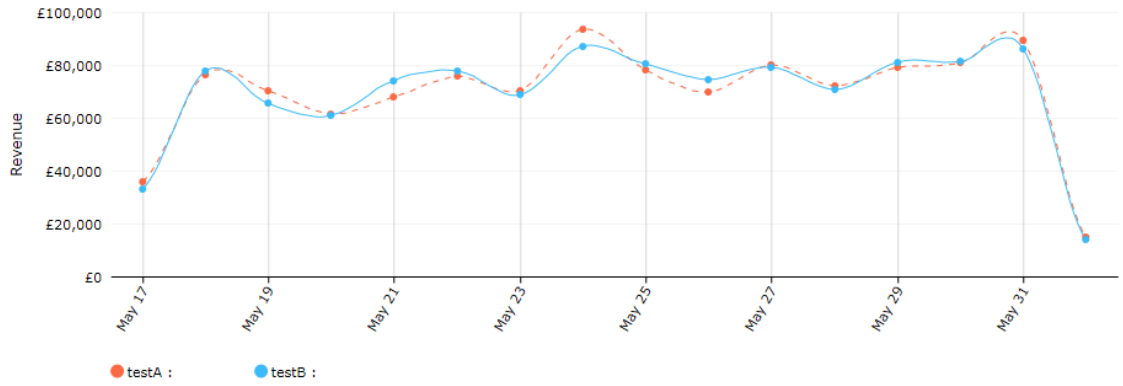
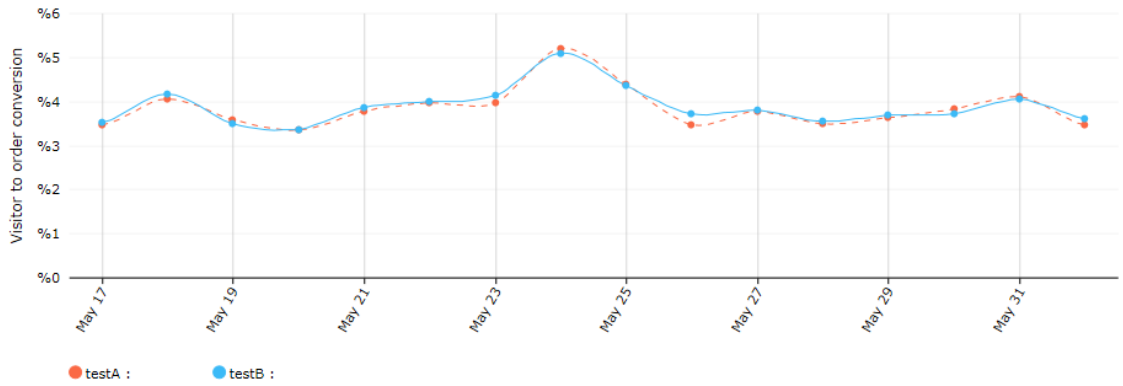
Numbers | Daily charts | Uplift charts | History

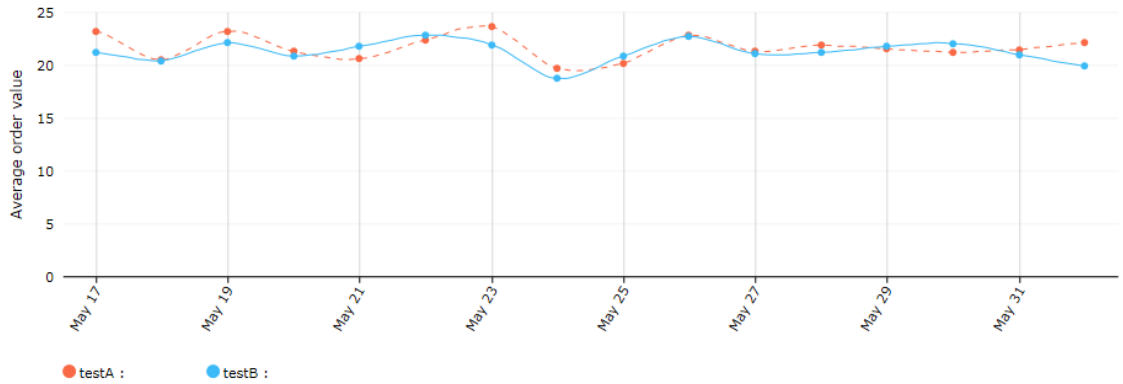
Revenue



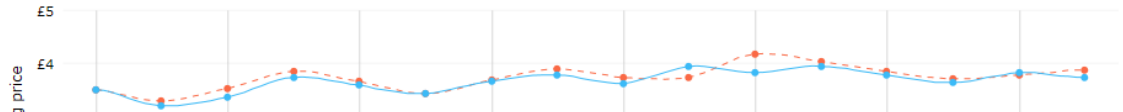
Visitor to order conversion



Average order value



Average selling price



AB tests > Uplift charts tab

The Uplift charts view shows graphs displaying the revenue, conversion and average order uplift value for a chosen test group vs the control group for the selected date range (which is cumulative) and over the past 7 days

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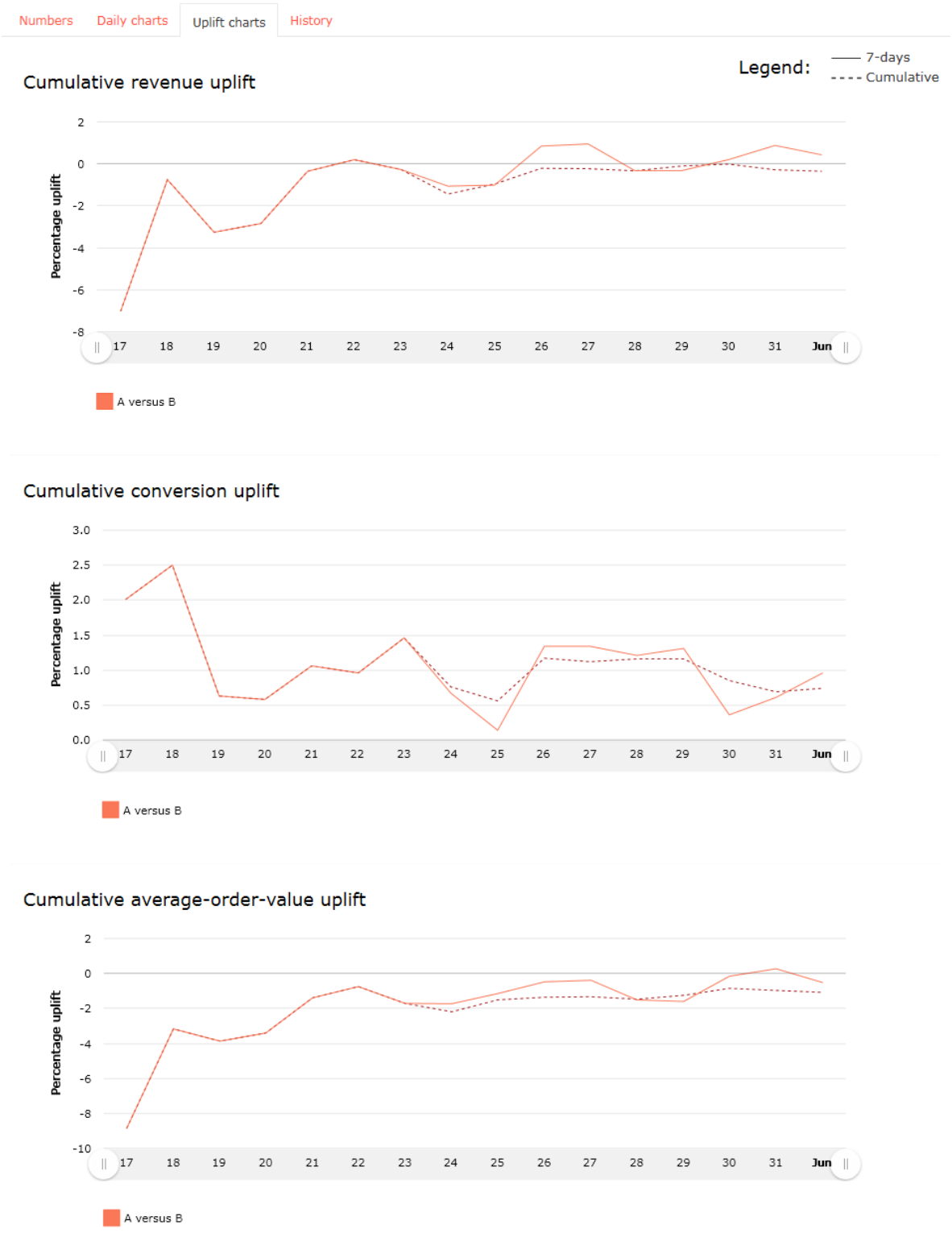

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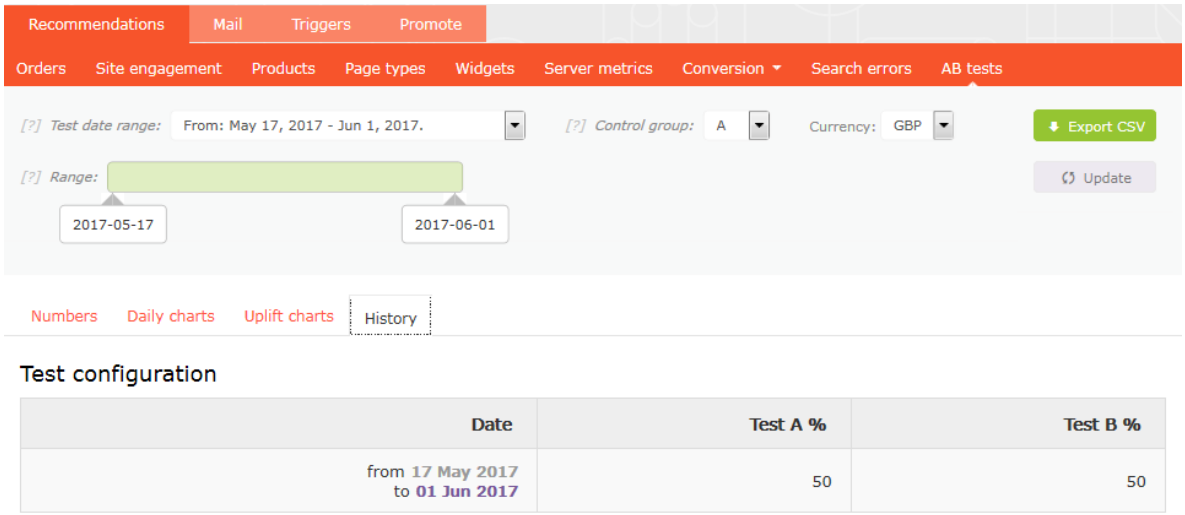
AB tests > History tab

The history tab shows a list of Recommendations A/B tests conducted on the site.



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Episerver Digital Experience Cloud

The Episerver Digital Experience Cloud™ unifies digital content, commerce and marketing in one platform, including omnichannel solutions for intelligent campaigns. The platform uses artificial intelligence and behavioral analytics to deliver personalized experiences everywhere. With our secure, reliable platform you can quickly increase engagement, revenue and productivity, while getting the fastest time to value.

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At Episerver, we believe digital transformation is a journey. We have been guiding customers for more than 20 years in providing standout digital experiences. Today our network of 880 partners, in 30 countries, supports 8,000 customers and over 30,000 websites. Founded in 1994, Episerver has offices in the US, UK, Sweden, Australia, Germany, Denmark, Finland, Norway, Poland, the Netherlands, Spain, South Africa, Singapore, Vietnam and the UAE.

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