



Episerver Personalization

User Guide



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Episerver Personalization User Guide

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Optimizely Personalization

Personalization lets you individualize content displayed to online visitors or sent to them by email, instead of showing the same content to everyone.

Optimizely Personalization includes the following features:

- Content Recommendations
- Visitor groups
- Personalization Product Suite

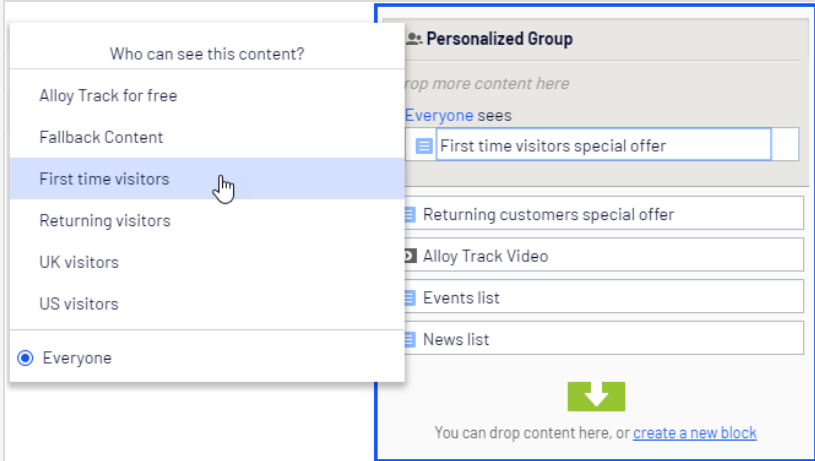
Note: The following Personalization Product Suite features are part of the [Optimizely Digital Experience Platform](#). Each feature requires a specific installation and license. After service on-boarding, you can access it from your web browser. See [Optimizely World](#) for technical information.

- Product Recommendations
- Email Product Recommendations
- Email Content Recommendations
- Triggered Messages
- Optimizely Visitor Intelligence
- Promoted Content

You can apply Personalization to an *individual* visitor, or for a *segment* of visitors. Personalization uses intelligent algorithms and also can be manually configured by administrators, editors, marketers, or merchandisers. Using visitor groups, you can manually target content for first-time site visitors, or visitors from a specific region. You can also apply automatic content recommendations, based on individual or group website behavior, and create email campaigns for selected groups.

Personalization tools include behavioral search ranking, product recommendations for web and email, promotion creatives, and automatic triggers and actions to help increase conversions and average order value.

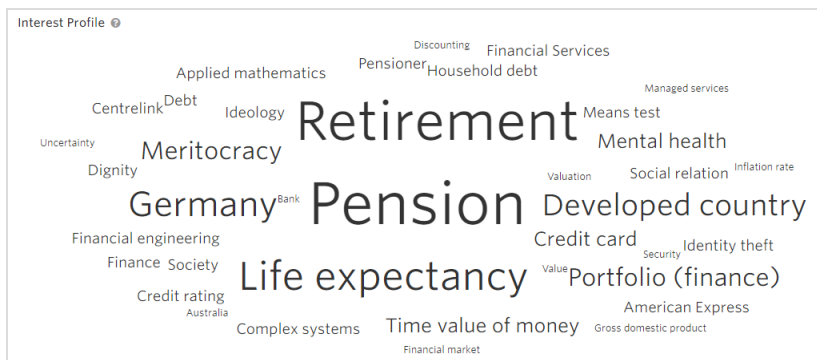
Personalization Product	Description
Content recommendations	Suggests topics of interest based on real-time website interaction, visitor profiles, and intelligent algorithms. Personalizing content is a powerful way to increase visitor engagement. For example, you can provide articles of specific interest on a news site.
Product Recommendations	Creates and configures a merchandising campaign with personalized product recommendations. Whether you display your products on the web or on a mobile device, Optimizely optimizes the ranking for every visitor, including behavioral data and merchandising strategies.
Email Content Recommendations	Includes personalized content recommendations in any email, including retargeting emails.
Email Product Recommendations	Includes personalized product recommendations in any email, including cart abandonment and retargeting emails.
Triggered Messages	Works with behavioral triggers to detect on-site behaviors and act on them through automated, personalized emails. Triggered Messages works with Email Product Recommendations and Optimizely Campaign only.
Optimizely Visitor Intelligence	Tracks and saves data about your website visitors, such as their name, email, associated company, and country of origin. You can then use this data in your campaigns, to craft and distribute personalized messages for specific target groups.
Personalization Portal	Available only if you have the features for the Personalization Product Suite installed on your site. The for the Personalization Portal is the user interface for accessing the features for Product Recommendations, Email Product Recommendations, Email Content Recommendations, Triggered Messages, and Promoted content. Features include automatic product and content recommendations online and through email.
Promoted Content	Promoted Content is available for Optimizely customers who use a non-Optimizely platform. Optimizely platform customers can

Personalization Product	Description
	<p>use similar functionality built into Optimizely CMS. See the Optimizely Promote User Guide (in PDF format only). See also the CMS Personalization guide.</p>
<p>Visitor groups</p>	<p>Visitor groups are a simple way to work with content personalization in Optimizely, using built-in functionality. You can for example design a product banner, a landing page, or a registration form, with content targeted towards for example first-time visitors, or visitors from a geographic region or market.</p>  <p>The screenshot shows a 'Who can see this content?' dropdown menu with options: Alloy Track for free, Fallback Content, First time visitors (highlighted with a mouse cursor), Returning visitors, UK visitors, US visitors, and Everyone (selected with a radio button). To the right, a 'Personalized Group' configuration panel is visible, showing a list of content blocks: 'First time visitors special offer', 'Returning customers special offer', 'Alloy Track Video', 'Events list', and 'News list'. A green arrow icon and the text 'You can drop content here, or create a new block' are at the bottom of the panel.</p>

Content Recommendations

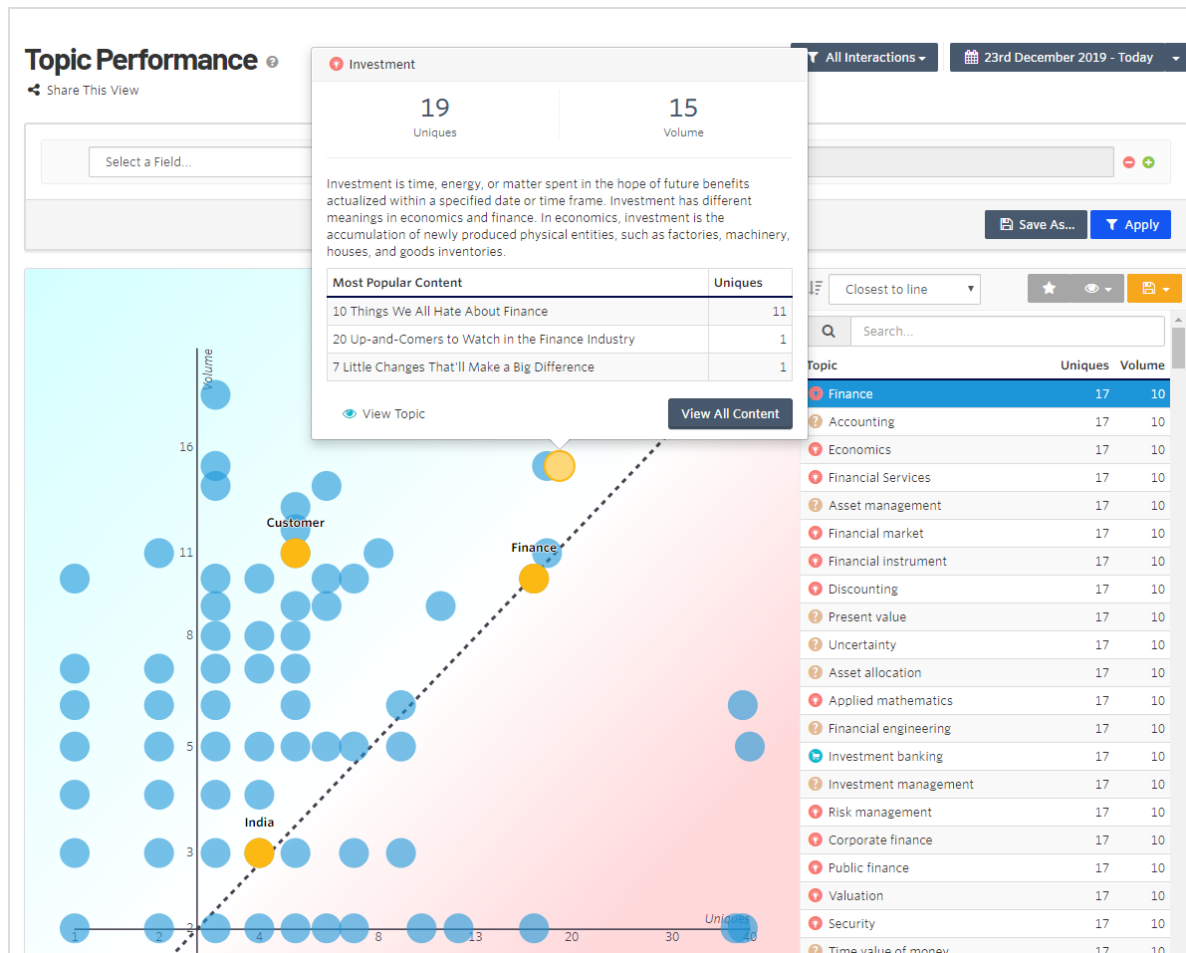
Content Recommendations anonymously tracks visitor activity on a website to build a profile for each visitor. Analysis of a unique profile lets you deliver the most relevant content to each visitor.

For example, based on the visitor's activity on the website, the topic cloud in the following image shows a visitor's interest in *retirement*, which you can use to recommend articles, blog posts, or other content related to *retirement planning*.



Content Recommendations uses Natural Language Processing (NLP) to match content that shares the greatest degree of similarity of an individual user's interest profile in real-time. As the user's interest profile changes with more content consumption, the corresponding recommendations change appropriately.

Content Recommendations has many evaluation tools to help you improve your content. For example, the topic performance chart shows how much interest there is in a topic. See [Topic performance](#).



You can use Content Recommendations with the rest of Optimizely in some following example ways:

- **A/B Testing.** Use built-in A/B testing with your recommendation blocks to determine where on the page a block gets the best results. You can monitor a block's performance over the life of your A/B test to determine which placement or design gets the best click-thru results.
- **Visitor Groups.** Trying to decide which persona should see which content? Create a visitor group on a particular page, and use two different blocks and deliveries to deliver two different experiences. You could deliver content-group-A to new users to the site, which selects from a different content flow and section; then content-group-B to returning visitors, depending on your tactics.

Terminology

The following terms are associated with Content Recommendations.

- **Content dashboard.** Lets you analyze the number of content items, unique topics, average number of topics per content item, natural language processing, and so on. To use dashboard filters, see [Filtering](#). The Content Dashboard also lets you analyze the following:
 - **Sources.** Shows the URLs where content items are viewed and interacted with.
 - **Contents.** Shows each content item processed by Content Recommendations.
 - **Sections.** Shows groups of content based on flow rules.
 - **Flows.** Shows rules for sections. You also can create rules.
 - **Properties.** Shows the Internet and email areas that Content Recommendations tracks.
- **Insight Dashboard.** Lets you track and analyze visitor interactions with your site, and the following:
 - **Topic Performance.** Shows a graph of *Volume versus Uniques* and plots topics on the graph.
 - **Content Utilization.** Shows content that performs well or not so well.
 - **Profiles.** Shows details about a visitor profile.
 - **Goals.** Shows conversions.
- **Engage dashboard.** Lets you analyze recommendations and the following.
 - **Deliveries.** Set up deliveries to drive personalized marketing to key customers.

Note: The menu item **Deliveries** requires extended user rights. Contact your Content Recommendations administrator.

- **Settings**. Lets you configure the Content Dashboard.
 - **Configuration**. Set up master filters or IP address filters.
 - **Shared Views**. Shows views shared by Content Dashboard users.
 - **Topic Selections**. Displays private or shared selections.
- **Source**. The origin of content that is ingested into the system.
- **Content item**. A web page that has an identifier associated with it.

A content item can contain many topics. For example, if you use a [filter](#) to look for *insurance*, Content Recommendations finds *insurance* on pages and returns the URLs where it is found.

Content Recommendations analyzes and audits content to show the following for each content item:

- source
- URL
- import and publish dates
- text content
- metadata associated with the content
- images linked to the content
- **Topic**. An indexed subject, such as *finance*, *insurance*, *hamburgers*, *rocks*, or brand name.

A topic is prioritized (weighted) based on the following criteria:

- frequency in a content article (higher weight value)
- frequency across all content articles (lower weight value).

Note: If a topic appears many times in an article, but also appears in many other documents, the weight is the average of the higher and lower weights.

- position of a topic in a content article
- time (how recent) since interacting with the topic. A topic becomes less weighted if a user has not interacted with content articles that include the given topic for a longer period of time.

- **Section.** Groups of content based on content/asset type, business category, industry, language or any grouping criteria of your choice.
- **Ingestion.** The process of gathering topics for analysis. For example, if a new URL is added to your website where Content Recommendations is implemented, that content is ingested into the system. If content changes after it was ingested, you can reprocess the content.
- **Flow.** Rules for sections based on titles, URLs, or metadata, to group content.
- **Goal.** A set of behaviors that you want someone to perform, such as filling out a form, requests for demos, downloading a resource, or *viewing three pages on the Financial site*. This helps to determine how interested a visitor is in the content. The idea is that people who view three pages on a financial site may be very interested in, say, *Retirement planning*.
- **Session.** The time span of activity for a visitor.
- **Unique.** A specific visitor to your website for a session.

Note: If a visitor visits your website after a previous session expired, a new session occurs and adds to the unique visitor count.

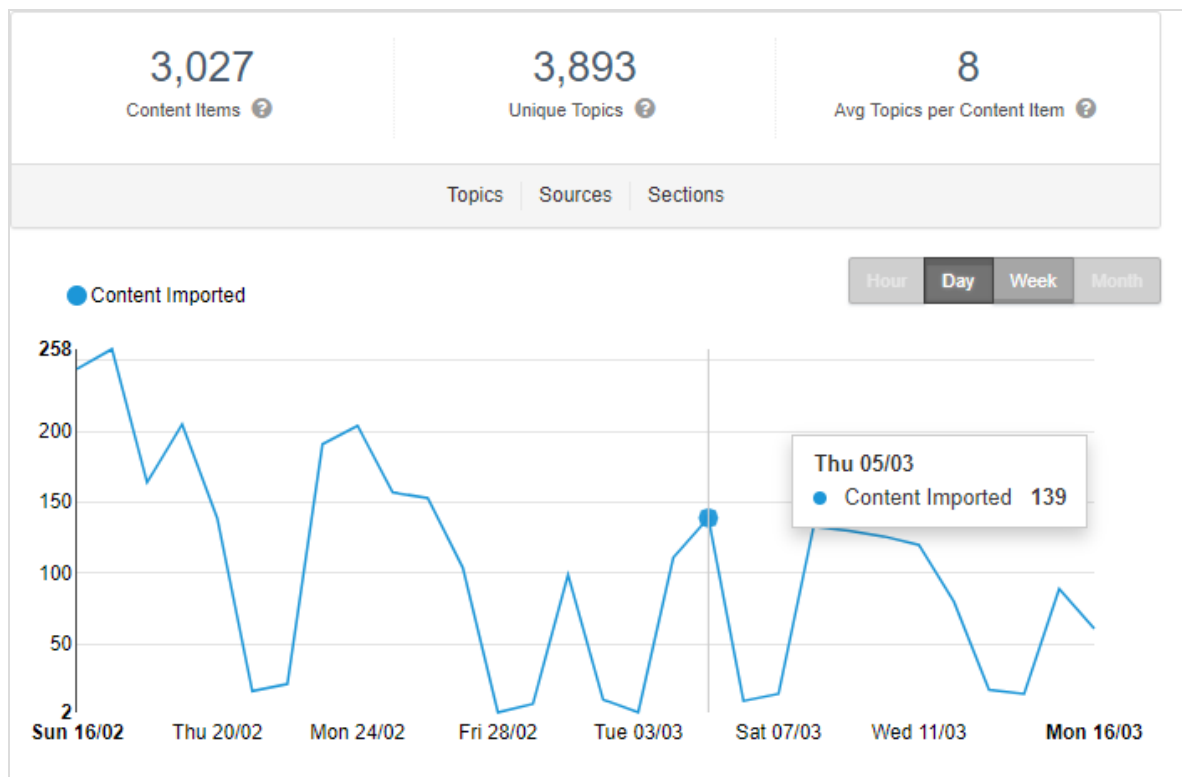
- **Volume.** The number of times a unique visitor views pages on your website during a session.

Content Dashboard

The Content Dashboard shows an overview of the following:

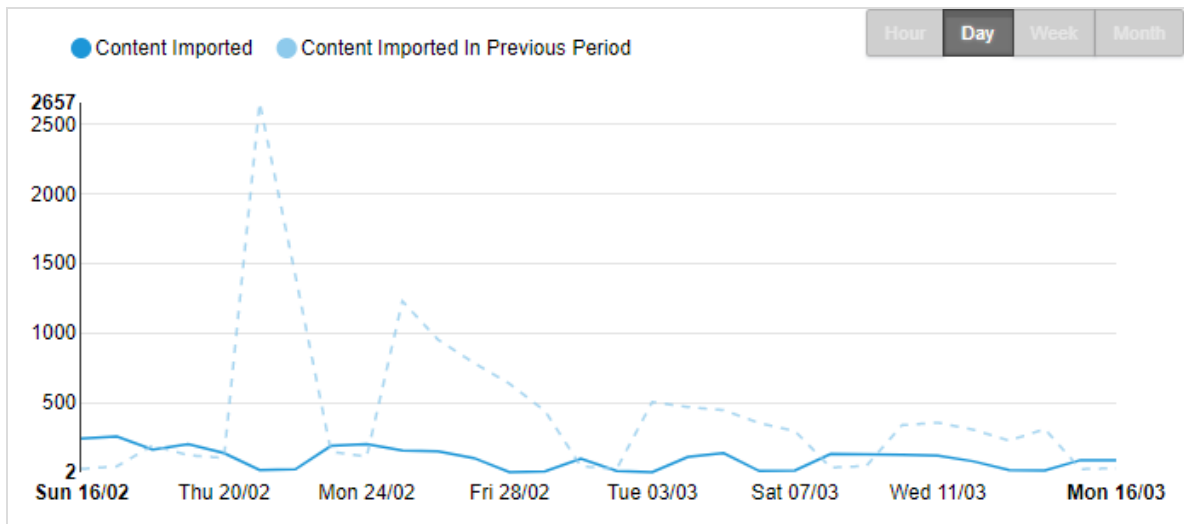
- the number of Content items that Content Recommendations processed
- the number of unique topics (generated by NLP)
- the average number of topics per content item

The graph shows when content was imported and ingested.

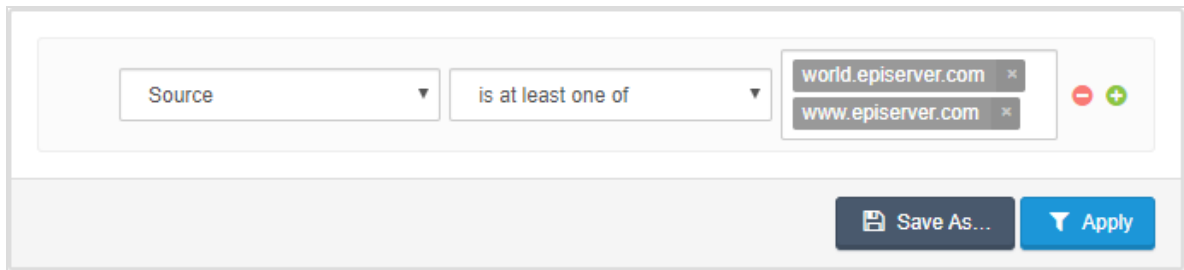


Note: Date labels are in dd/mm format.

Click **Compare** to compare data to the previous period for which data was gathered. A dotted plot line is overlaid on the current data, and you can see whether there is an increase or decrease in activity.



Filtering lets you analyze your content repository in different ways so you can determine whether content is driving conversions and encouraging prospects further down the sales process. For filtering examples, see [Filtering Content Recommendations](#).







The following scenarios describe several uses for the Content Dashboard.

- A content editor wants to know which other topics are mentioned along with a particular topic of interest.
- A content editor wants to reduce the amount of content being created and keep it more focused.
- A content editor wants to group content in a clear and concise way.
- A content creator wants to see which topics were extracted from a content item.
- A website owner wants to know what are the most talked about topics across all content.

- A website owner wants to know where the majority of their content is across multiple locations. A content creator wants to see what topics they covered in a content item they just created.

In each scenario, you want to know which topics are published more and how content volume against each topic changes over time.

- The **Topics** view shows how often a topic appears in the processed content. In the following example, *Investment* appears four times in the content.

Topics 	Top Topics 	Content
1.  Management		5
2.  Finance		4
3.  Investment		4
4.  Accounting		4
5.  Economics		4
6.  Financial Services		4
7.  Asset management		4
8.  Financial market		4
9.  Personal finance		4
10.  Financial instrument		4
+ View More		

- The **Sources** view shows how much of the content appears from each source. The example, shows that six content items came from *moseycapital.epi-uk.net*. For more details about Sources, go to **Content > Sources**. See also [Sources](#).

Sources 	Content
1.  moseycapital.epi-uk.net	6
	

- The **Sections** view shows the categories into which the content fits, such as *Mosey Capital*. For more details about Sections, go to **Content > Sections**. See

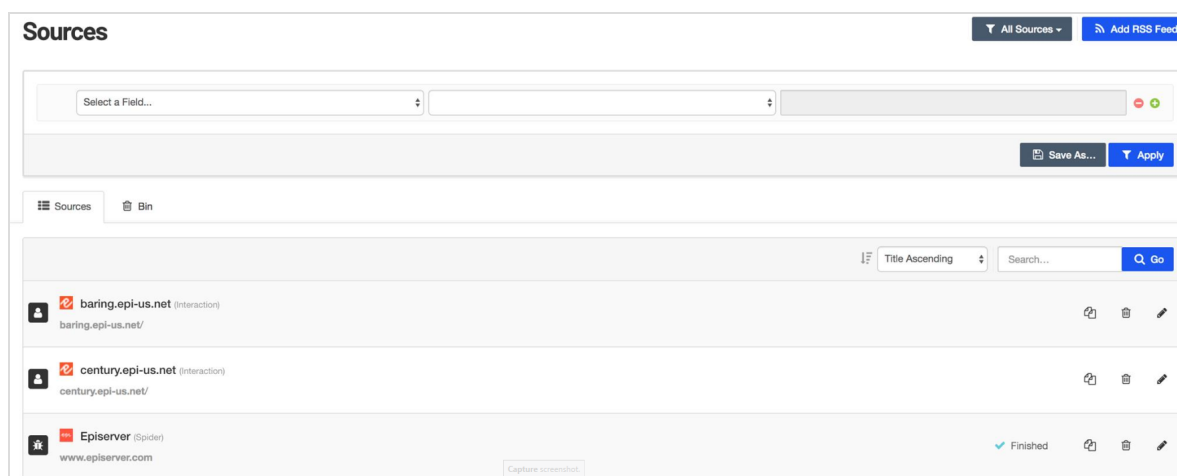
also [Sections](#).

Sections ?	Content	% Content
1. Mosey Captial	5	83.33%



Sources

The **Sources** view shows the sources (URL origins, such as *baring.epi-us.net*) of content items. If a new source is added, its content is ingested and processed. You can [filter](#) and save Sources views for frequent use, and [share a view](#) with a linked URL. Saved filters are shown in the **All Sources** menu.



The screenshot displays the 'Sources' management page. At the top, there are buttons for 'All Sources' and 'Add RSS Feed'. Below this is a filter section with a 'Select a Field...' dropdown and a search input. The main area shows a list of sources:

- baring.epi-us.net (Interaction)**: baring.epi-us.net/
- century.epi-us.net (Interaction)**: century.epi-us.net/
- Episerver (Spider)**: www.episerver.com (Status: Finished)

Each source entry has icons for refresh, delete, and edit. A 'Save As...' and 'Apply' button is visible above the list. The interface also includes a 'Sources' tab and a 'Bin' icon.

Adding an RSS feed

An RSS feed (such as *http://www.optimizely.com/?feed=RSS*) has an **Active/Paused** toggle button to activate the source.

Add RSS Feed

✕ Cancel
▶ Active
Save

📡

Options

URL

Approval

Automatically approve content that comes from this source.
You can also approve content manually through manager, or selectively using flows.

Output Display

Make the full content available
Ensure that you have the correct licensing agreements in place when republishing third party content in full.

Only include the abstract

Only include a link to the original content

Override Existing Content

Override existing content with data from this source.
Existing content items with the same URL from interaction sources (i.e. via tracking Javascript) will be overridden using data from this source.

- **Title.** Enter the name of the source from which you want to extract content.
- **Approval.** Enable to automatically approve content from the source.

Note: Unapproved content interactions are still tracked and contributes to profile optimization. However, they cannot appear as a recommendation to a user within a widget.

- **Output Display.** Select the type of output you want to extract from the source.
 - **Make the full content available**
 - **Only include the abstract**
 - **Only include a link to the original content**
- **Override Existing Content.** If a piece of content is ingested from another source, enable this option to override existing content with potentially new data from the new source. This saves space at the expense of losing access to older content.

When you click **Save**, the source is added to the list.



Content List

The **Content List** view shows each content item that is successfully processed for tracking. The content list also displays associated sections next to content items, which helps you create filters to refine sections.

You can [filter](#) and save Content views for frequent use. Saved filters are shown in the **All Content** menu. You also can [reprocess the content](#).

The screenshot displays the 'Content' management interface. At the top, there are filters for 'All Content' and 'All Time', along with a '+ Create Content' button. Below this is a search bar with a dropdown menu labeled 'Select a Field...'. A 'Save As...' button and an 'Apply' button are also visible. The main content area shows a list of items with columns for selection, content name, status, and actions. The items listed are 'Date Night Style', 'Street Style', 'Travel Style', and 'Workout like a Pro', all categorized as 'Inspirational content' and marked as 'Approved'. Each item also shows it was 'Imported: 3 hours ago'.

Selection	Content Name	Category	Status	Imported
<input type="checkbox"/>	Date Night Style	Inspirational content	Approved	Imported: 3 hours ago
<input type="checkbox"/>	Street Style	Inspirational content	Approved	Imported: 3 hours ago
<input type="checkbox"/>	Travel Style	Inspirational content	Approved	Imported: 3 hours ago
<input type="checkbox"/>	Workout like a Pro	Inspirational content	Approved	Imported: 3 hours ago

Get more details by clicking content items in the view. Details let you determine whether content is being ingested as intended. The details include:

- Topics and their relevance (displayed by size)
- URL
- Source
- Publish and import date
- Text content
- Metadata associated with the content
- Images linked to the content

Content / 7 Little Changes That'll Make a Big Difference


7 Little Changes That'll Make A Big Difference Edit

Topics ☁️ ☰

Risk management
Present value
Financial engineering Finance
Time value of money
Applied mathematics Investment banking
Corporate finance Public finance
Investment management

Details

URL
https://moseycapital.epi-uk.net/en/insights/7-little-changes-thatll-make-a-big-difference/

Source	Imported
 moseycapital.epi-uk.net	Tuesday, 7th January
Language	
English	

Content Metadata Debug

Finance is the study of money and how it is used. Specifically, it deals with the questions of how an individual or company acquires the money needed - called capital in the company context - and how they then spend or invest that money. Finance is often split into three areas: personal finance, corporate finance and public finance.

At the same time, finance is about the overall "system" - i.e. the financial markets that allow the flow of money, via investments and other financial instruments, between and within these areas; this "flow" is facilitated by the financial services sector. A major focus within finance is thus investment management — called money management for individuals, and asset management for institutions — and finance then includes:

1. the associated securities trading
2. investment banking
3. financial engineering
4. and risk management

More abstractly, finance is concerned with the investment and deployment of assets and liabilities over "space and time": i.e. it is about performing valuation and asset allocation today, based on risk and uncertainty re future outcomes, incorporating the time value of money (determining the present value of these future values, "discounting", requires a risk-appropriate discount rate). As an academic field, finance theory is studied and developed within the disciplines of management, (financial) economics, accountancy and applied mathematics. Correspondingly, given its wide application, there are several related professional qualifications, that can lead to the field. As the debate to whether finance is an art or a science is still open, there have been recent efforts to organize a list of unsolved problems in finance.

Reprocessing content

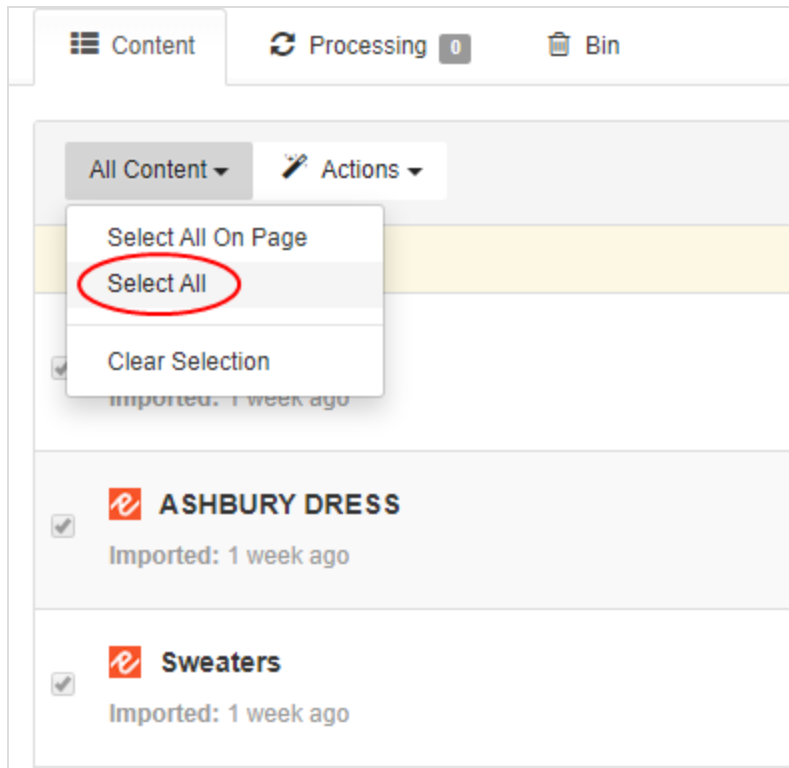
You can reprocess content in the following situations:

- You want to re-evaluate the topics that were picked up (because of NLP changes).
- You want to re-evaluate the content body after content scraping fixes (for example, remove non-unique content elements on a page, such as a disclaimer).
- The content has moved and you want Content Recommendations to update the URL.
- The content editor has changed the article.
- The content editor has added or changed metadata and you want to pick it up (want this to go into a section as a result, see case below).

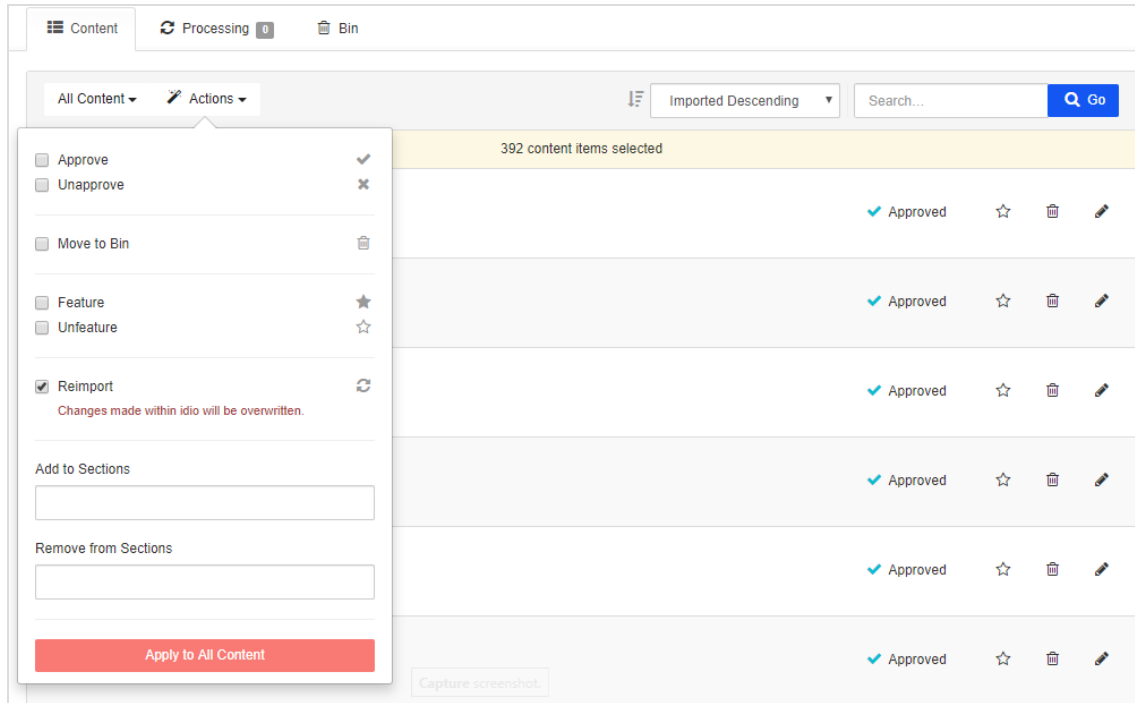
Warning: Reprocessing content overwrites changes that possibly were made manually to the content. Reprocessing does not re-evaluate [flows](#). If the content no longer exists—for example, it was recently deleted—reprocessing automatically removes it.

To re-analyze content that is in the system, (that is, content that is already ingested), do the following:

1. To process content again, select **All Content > Select All**.



2. Select **Actions > Reimport**, then click **Apply to All Content**.

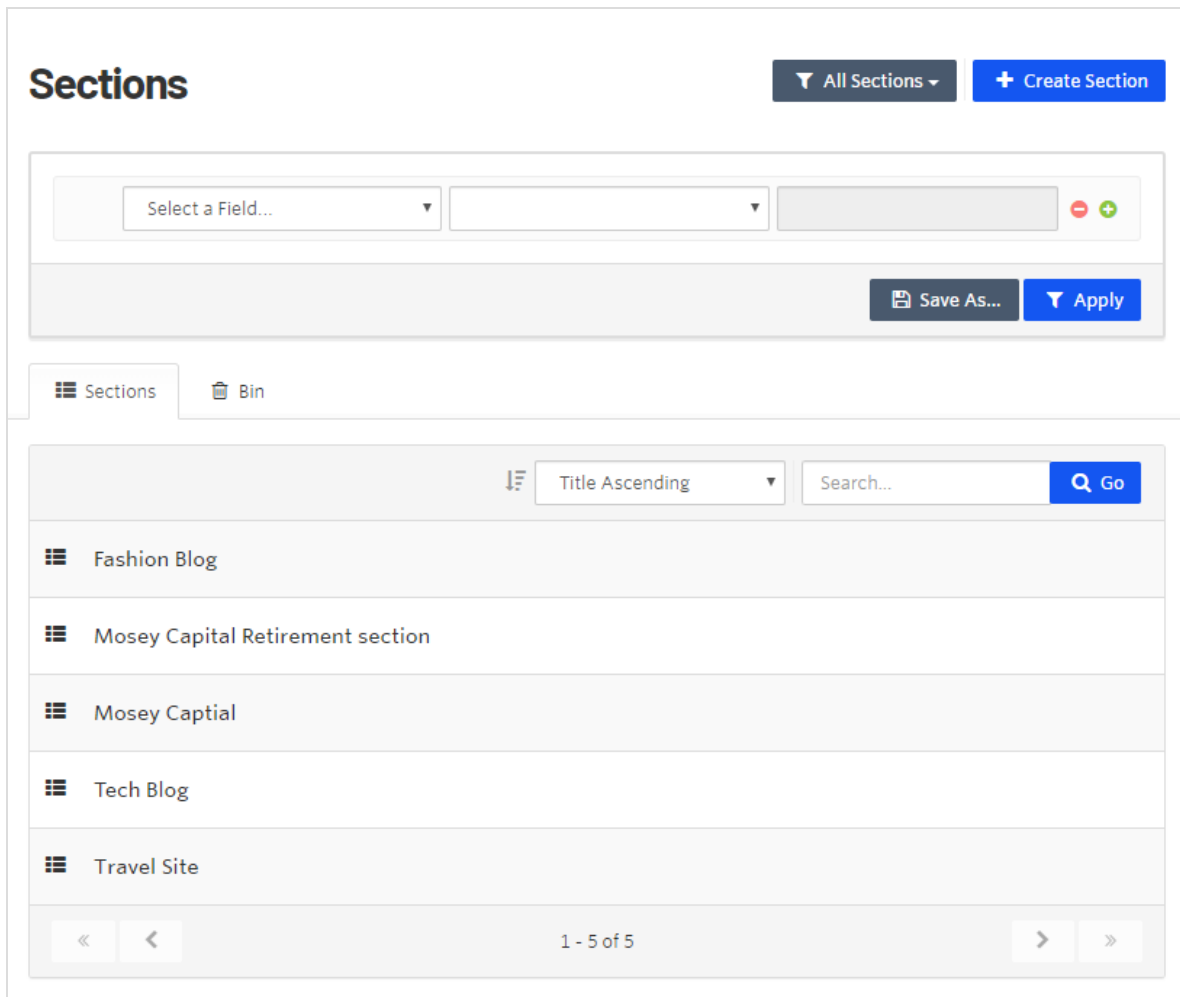


Sections

The **Sections** view shows groups of content based on flow rules. You can assign multiple flows to a section. A piece of content can be in more than one section provided the rules for creating it are not mutually exclusive.

For example you create one flow with *published before X date*, and another with *published after X date*.

You define sections when setting up Content Recommendations. You can [filter](#) and save Section views for frequent use, and [share a view](#) with a linked URL. Saved filters are shown in the **All Sections** menu.



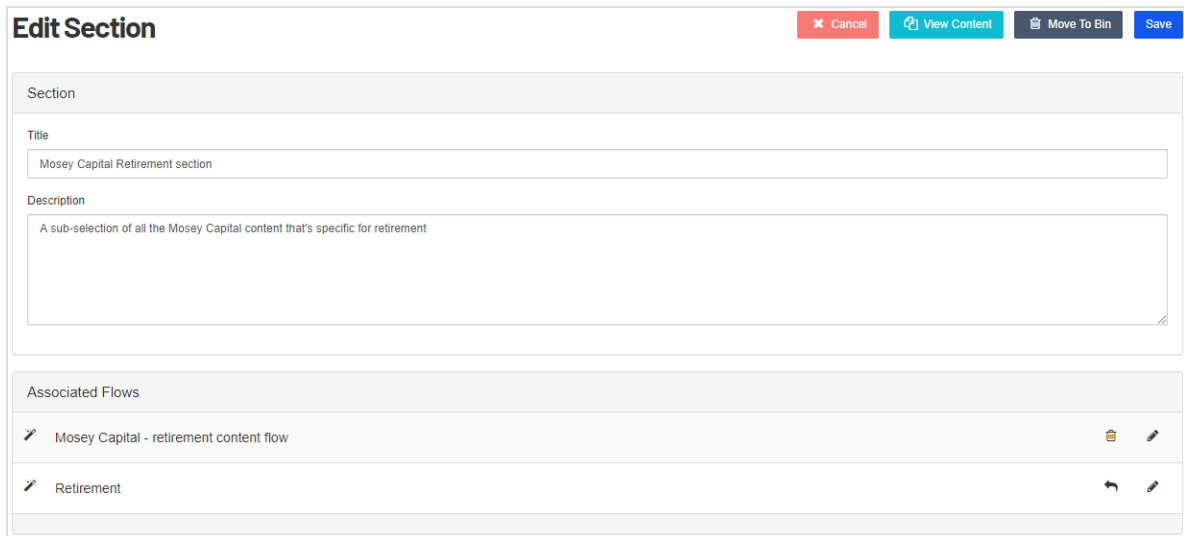
Click a section name in the list to edit its attributes.

Deleting a section

Note: Before moving a section to the bin, you should remove associated flows. This is because a content item that belongs to a removed section retains that section's label. For example, *content1* is in *section1*. If you remove *section1*, *content1* is still part of *section1*.







To remove an associated flow from a section, click **Bin** (trash can icon). To restore a removed flow, click **Restore** (back arrow icon).

Click **Move To Bin** to delete the section.



The screenshot shows the 'Edit Section' interface. At the top right, there are four buttons: 'Cancel' (red), 'View Content' (teal), 'Move To Bin' (dark grey), and 'Save' (blue). The main content area is divided into three sections:

- Section**: A header for the section details.
- Title**: A text input field containing 'Mosey Capital Retirement section'.
- Description**: A text area containing 'A sub-selection of all the Mosey Capital content that's specific for retirement'.
- Associated Flows**: A list of flows with edit and delete icons for each.

Associated Flows		
 Mosey Capital - retirement content flow		
 Retirement		

Click **View Content** in the edit view to see the content that the section groups.

Content Section is Mosey Capital Retirement section All Time Create Content

Section is at least one of Mosey Capital Retirement section

Save As... Apply

Content Processing 0 Bin

0 selected Actions Imported Descending Search... Go

<input type="checkbox"/>	Services Mosey Capital Mosey Capital Retirement section	Approved
Imported: on 05/12/2019		
<input type="checkbox"/>	How the new deeming rates could affect you Mosey Capital Mosey Capital Retirement section	Approved
Imported: on 05/12/2019		
<input type="checkbox"/>	Aged care for those on the land Mosey Capital Mosey Capital Retirement section	Approved
Imported: on 05/12/2019		

Flows

The **Flows** view lets you create and view rules for sections. Create rules based on titles, URLs, or metadata to group content.

Flows All Flows + Create Flow

Select a Field... + -

Save As... Apply

Flows Bin

Title Ascending Search... Go

- Remove Episerver UI pages
- Fashion Blog
- Mosey Capital - all content flow
- Mosey Capital - retirement content flow
- Tech Blog
- Travel Site

1 - 6 of 6

Click **Create Flow**, then enter a flow name and rules. For example, the following example flow called *International sports* is defined as the *Source is at least one of Episerver or century.epi-us.net*, and *Topic is at least one of 2020 Summer Olympics, 2014 Winter Olympics, 2014 FIFA World Cup, or 2003 Rugby World Cup*. The flow rules found 2 content items that will be automatically given approval status. As other content items that satisfy these criteria are added, this flow will approve them.

Create Flow

Cancel Save

International sports

When the following rules are matched...

Source	is at least one of	Episerver century.epi-us.net	-
AND Topic	is at least one of	2020 Summer Olympics 2014 Winter Olympics 2014 FIFA World Cup 2003 Rugby World Cup	- +

...take these actions

- Approve ✓
- Move to Bin 🗑
- Feature ★
Content marked as featured will be considered for recommendation even if a user has already interacted with a piece of content.

Add to Sections

Inspirational content x Travel Site x

Options

Apply to 2 existing content items
This can take some time to complete.

Preview

Note: Content is evaluated against each flow only when it is imported. Editing a flow, or reprocessing content does not re-evaluate that content against the flow. To re-evaluate content against a flow, click **Apply to X existing content items**.

However, this affects content that matches the rules of the flow and not necessarily all content that was ever affected by that flow. A flow will never move content out of a section, which can be accomplished only manually through the content list, using [filters](#) and bulk actions.

- **Approve.** If the criteria match, approve the content item.
- **Move to Bin.** If the criteria match, move the content item to the Bin (denying content from being ingested).
- **Feature.** If the criteria match and this is enabled, the content is given priority recommendation, even if the visitor already interacted with the content.
- **Add to Sections.** Click the field to select from existing sections where the content should get associated. For example, you might have a content section and a documentation section about financial issues.

Note: You can create a new section by entering a new section name in the **Add to Sections** field.

- **Options.** Content Recommendations shows how many content items match the criteria. Click **Preview** to see the matching content. Upon viewing this, you may want to refine the flow rules. Enable the check box to apply the rules to existing content items when you click **Save**.

Note: Preview only shows ten items as an example; not the full list of items. (Image shows three.) To see the full list of content, mimic the flow within the Content Dashboard.

Preview ✕

Native APIs

To make the handling of Episerver Campaign web services even easier, Episerver provides native APIs that encapsulate all of the web service functionality. Contact customer support for further details.

Uploadpersonalizedattachments

This operation uploads one or more attachments in Episerver Campaign. These attachments can be used when sending transactional mails. For more information regarding the Personalized Attachments feature, see [Personalized Attachments — Examples](#).

REST API

Use the REST API to integrate Episerver Campaign features into your software or manage and control them remotely by using HTTP requests. The REST API is a convenient alternative to the SOAP API that lets you also manage Smart Campaigns.

Making changes to an existing flow

A *section* is a group of content. A content item can exist in multiple sections.

You can set up a flow as follows:

1. Set up the original flow as follows:

When the following rules are matched...

	Original Url	contains	/blog/	-
AND	Source	is at least one of	moseycapital.epi-uk.net	- +

...take these actions

Approve ✓

Move to Bin 🗑️

Feature ★
Content marked as featured will be considered for recommendation even if a user has already interacted with a piece of content.

Add to Sections

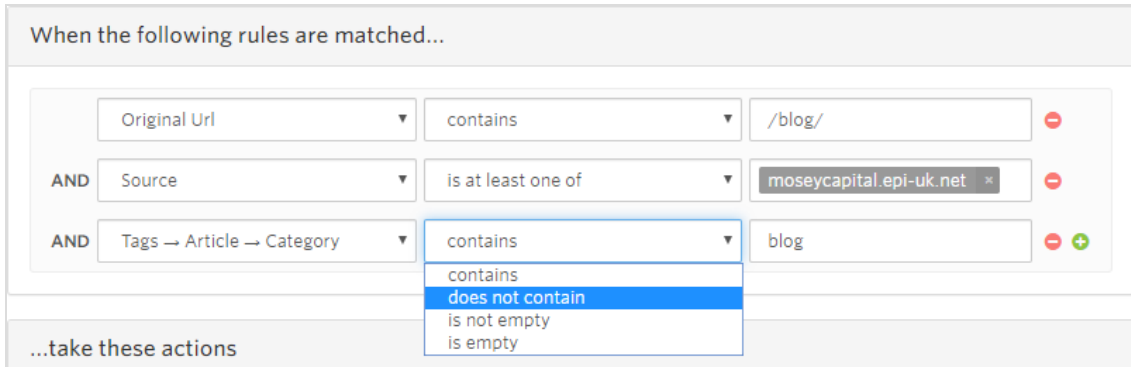
Tech Blog

2. Add another condition to make the flow more granular.

When the following rules are matched...

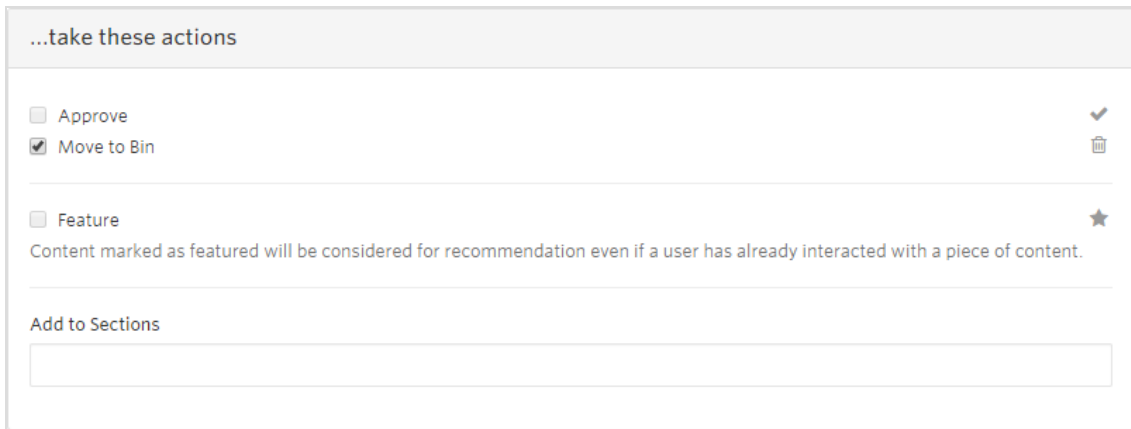
	Original Url	contains	/blog/	-
AND	Source	is at least one of	moseycapital.epi-uk.net	-
AND	Tags → Article → Category	contains	blog	- +

3. Filter the **Content** view by flipping the condition.



4. Modify the flow action for when the content does not match the flow.

Note: Move to Bin deletes content from the instance; it does not remove content from the flow.



5. Click **Apply to X existing content items**.

Troubleshooting flows

In the **Options** view, you can evaluate the existing content count to determine whether a flow is becoming less or more granular.

- If the flow is becoming *less* granular, the count goes up for content that matches the flow.
 - Edit the flow and select **Apply to X existing content items**, which performs the flow action rules against the historical content and any new content.
- If the flow is becoming *more* granular, the count goes down for content that matches the flow.
 - Use the content list [filters](#) to select content that previously matched this flow (essentially re-creating the flow rules) with the *opposite* of the more granular rule you were adding. Then use the actions in the content list to perform the opposite of the actions of the flow.

The following list shows common flow changes, some of which *do not* produce the results you might intend.

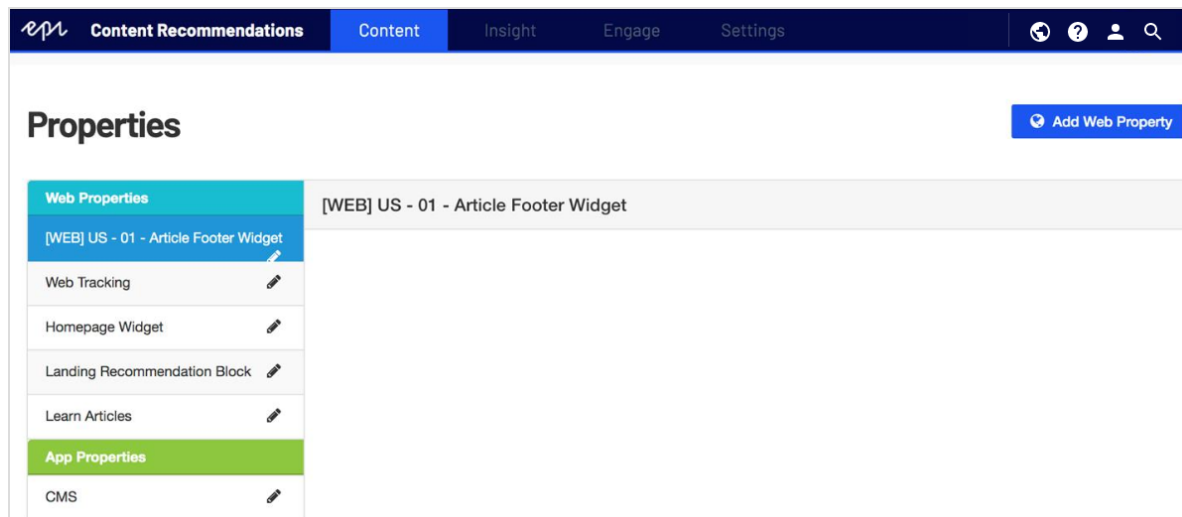
- A section has content it should not have, so you update the flow to be more granular and click **Apply to X existing content items**.
 - This only modifies a section moving forward, not retroactively. So **Apply to X content items** does nothing because the content is already in the section.
- A section has content that it should not have. So you update the flow to be more granular and reprocess the content.
 - Reprocessing the content does not re-evaluate flow rules. So the existing content stays in the section. Reprocessing achieves nothing but potentially eliminates manual updates to the content.
- You added metadata to content to identify the section where the content should belong. You create the flow and then reprocess the content to pick up that metadata in that section.
 - Reprocessing content does not re-evaluate flow rules. So although the new metadata is captured, you need to run the flow with **Apply to X existing content items** after it is reprocessed, or update the flow after the reprocessing.
- A section does not have all the content it needs, so you make the rule more broad and click **Apply to X existing content items**.
 - This is *correct* because historical content matching is added, and future content is evaluated against this when it is imported.

- You create a new section, produce a flow, and click **Apply to X content items**.
 - This is *correct* because historical content matching is added, and future content is evaluated against this when it is imported.

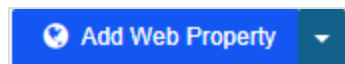
Properties

The **Properties** view lets you create unique tracking scripts for your site.

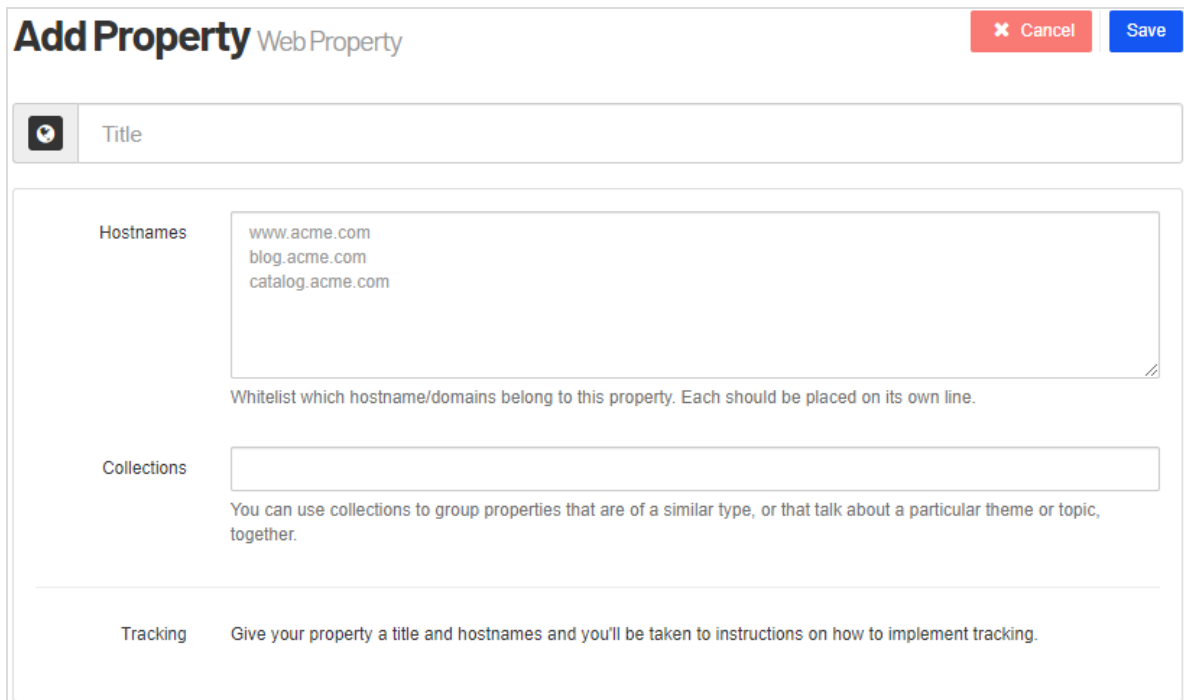
Note: Your onboarding manager typically provides this. This feature is not commonly used.



You can add a web property.



The **Add Web Property** view has the following fields.



Add Property Web Property ✕ Cancel Save

Hostnames
www.acme.com
blog.acme.com
catalog.acme.com

Whitelist which hostname/domains belong to this property. Each should be placed on its own line.

Collections

You can use collections to group properties that are of a similar type, or that talk about a particular theme or topic, together.

Tracking Give your property a title and hostnames and you'll be taken to instructions on how to implement tracking.

- **Title.** Enter the name of the new property.
- **Hostnames.** Enter domains and sub-domains you want to whitelist for content ingestion. Only domains or sub-domains on this list are ingested. Place each name on its own line.
- **Collections.** Enter a new collection (that is, a theme or topic such as *finance*, or *retirement*), or select from existing collections from a drop-down.

When you click **Save**, the **Tracking Javascript** view appears. This view has on-screen instructions to help you set up the property.

Options

User Identification

- I do not know anything about visitors of this property
- I know the idio user identifier for some visitors of this property
- I know another user identifier for some visitors of this property

Automatic Event Tracking

This site loads content dynamically – for example using AJAX – and so I need to trigger 'consume' events manually.
In most cases, you will want to leave this option unchecked.

PDF Tracking

I want to track PDF files
This feature is experimental and may not work for everyone

- **User identification.** Select the option that best describes the visitors of this property. In most cases, select the default option.
- **Automatic Event Tracking.** Enable only if your site loads content dynamically.
- **PDF Tracking. Experimental.** Enable to track PDF files.

Installation & Usage

Caveats Some websites might require a custom solution in order to properly support tracking.
For example, if you:

- display content using **iframes**
- **require users to log in** in order to access content (e.g. a paywall or subscription)
- or wish to track the same users across **multiple domains**

then please contact us to discuss a solution.

Canonical Tags **We strongly recommend that you define canonical URLs for your content using [canonical meta tags](#).** Canonical tags help prevent article duplication issues.

Published Dates idio will only consume the published date of your content if it contains the relevant meta tag. **You are strongly advised to [add these](#)**, particularly if filtering by published date is important to you.

```
<meta property="article:published_time" content="2020-03-16T18:40:11+0000" />
```

[Copy to Clipboard](#)

- **Caveats.** Contact Optimizely for a custom solution.
- **Canonical Tags.** See [Consolidate duplicate URLs](#).

- **Published Dates.** Add article meta tags to your webpage. See https://o-gp.me/#type_article.
- **Include code.** Add the following JavaScript code in the <head> tags.

Note: You need this only if you are deploying with a manual installation. You do not need to deploy a tracking script again via manual installation if Content Recommendations was installed from a NuGet package, because tracking is included in that installation.

Include Code Include the following JavaScript snippet in the <head> of your webpage. Alternatively, if you use a tag manager, such as Google Tag Manager, you can use it to include the code.

```

<!-- idio Analytics Tracking Code -->
<script type="text/javascript">
  // Set client and delivery

  _iaq = [
    ['client', 'salesdemo'],
    ['delivery', 2585],
    ['track', 'consume']
  ];

  // Include the Idio Analytics JavaScript
  !function(d,s){var ia=d.createElement(s);ia.async=1,s=d.getElementsByTagName(s)[0],ia.src='//s.idio
</script>
<!-- / idio Analytics Tracking Code -->

```

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- **Track Events.** Optionally, add event calls (**consume**, **like**, **dislike**, **share**, **comment**, **group**, and **exit**) to the webpage to track other personalization events.
- **Tracking Conversions.** Optionally, add a **convert** event to the webpage to track conversions.

Note: Content Recommendations cannot ingest granular conversion-level data, such as Order ID, price, and so on.

Optional functionality

Track Events You can make calls to 'track' other events which we take into account when personalising. Types of events that we accept are `consume`, `like`, `dislike`, `share`, `comment`, `group` and `exit`. **Note:** `exit` events are for when a user is leaving a page. For example, you could allow the user to give feedback on the article they're reading:

```
<a href="javascript:_iaq.push(['track', 'like']);">I like this article</a>
```

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Tracking Conversions You can track conversions against a goal by tracking a `convert` event. **Note:** the goal name must be less than 255 characters in length. If the goal does not already exist, it will be created. For example, you could record a conversion against the 'Subscribed to Newsletter' goal:

```
_iaq.push(['goal', 'Subscribed to Newsletter']);  
_iaq.push(['track', 'convert']);
```








Copy to Clipboard

[Capture screenshot.](#)

Click **Done** at the top of the view.

To return to the **Web Property** view, click **Tracking JavaScript** in the right pane. Click **Edit** (the pencil icon) to update settings, such as for updating or removing hostnames.

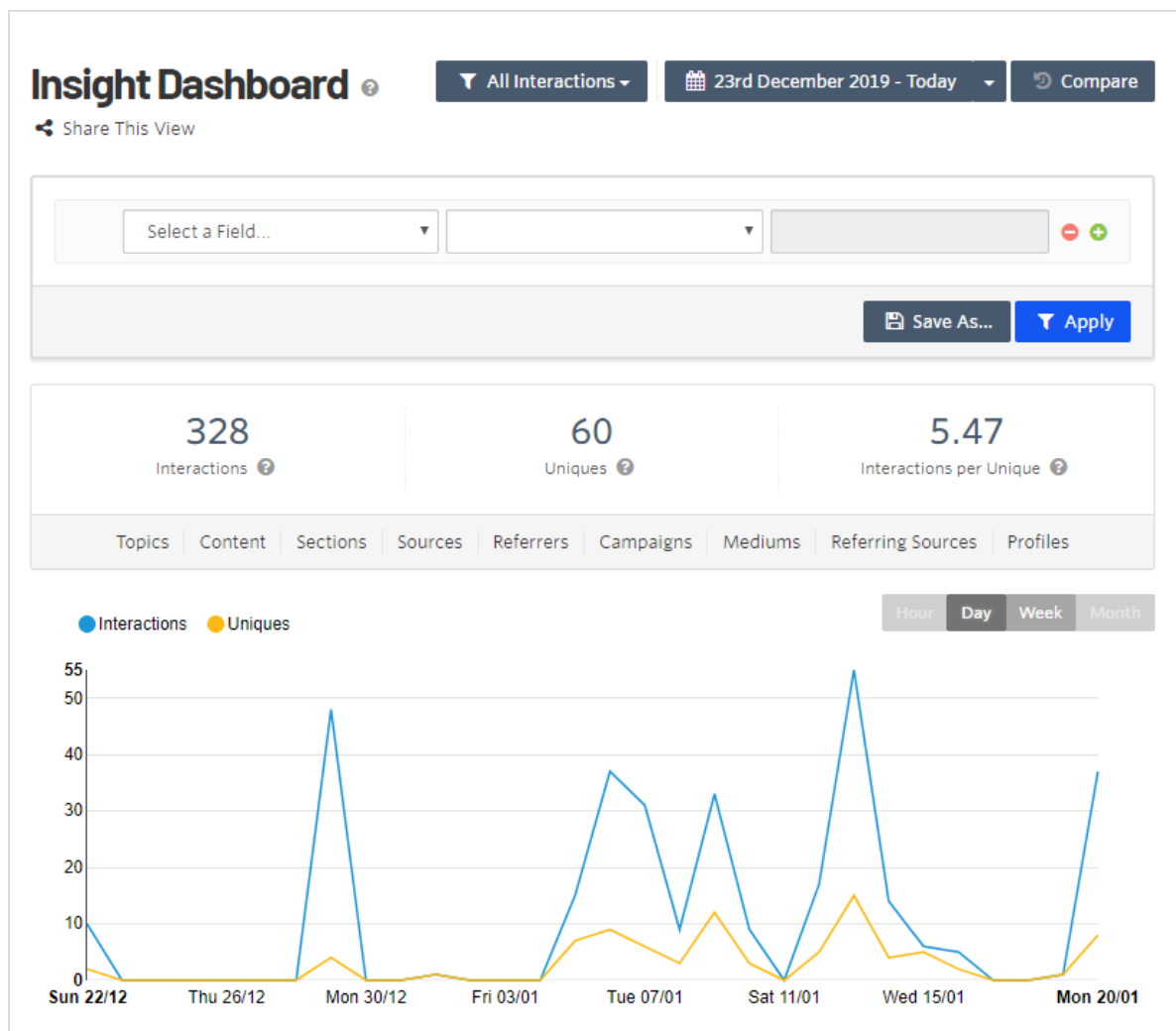
Properties

Web Properties	Acme
Acme 	
Epi 	 Tracking Javascript
Fashion Widget 	
Mosey Capital Retirement widget 	
Mosey Capital widget 	
Retirement Finance 	

Insight Dashboard

The **Insight Dashboard** shows how topics are performing by number of interactions (views on a page), uniques, and the number of interactions per unique visitor. This information can help you determine how users are interacting with content.

You can [filter](#) and save Interactions views for frequent use, and [share a view](#) with a linked URL. Saved filters are shown in the **All Interactions** menu.



Note: Date labels are in dd/mm format.

You can filter data. For example:

- Section: Blog
- Referrer: Facebook
- Goals: Signed up for Newsletter
- Result: Tells which topics and content drove users to the site from Facebook, read blog content, then signed up for the newsletter.

The screenshot shows a filter configuration interface. On the left, there is a dropdown menu labeled 'Goals' and a relationship dropdown menu labeled 'is at least one of'. To the right, there is a list of filter items: 'Mosey travel: made booking' and 'Mosey travel: viewed at least 3 blog pages'. Each item has a close button (x). There are also minus and plus icons for adding or removing items. At the bottom right, there are 'Save As...' and 'Apply' buttons.

The following **Insight Dashboard** views show which items are performing best to least in the following categories.

- Views
 - [Topics in content](#)
 - [Content](#)
 - [Sections](#)
 - [Sources](#)
 - [Referrers](#). The URL from which a visitor came to your content.
 - **Referring Campaigns**. The utm code (for Google Analytics only) where a visitor came from.
 - **Referring Mediums**. The marketing channel from where a visitor came.
 - **Referring Sources**. Links to your content.
 - [Profiles](#)

















- Performance categories
 - Interactions
 - Percentage of Interactions
 - Uniques
 - Percentage of Uniques
 - Interactions Per Uniques (IPU)

Topics in Content view

The **Topics in Content** view shows the number of interactions (from highest to lowest) that each topic had with content that contains it. Topic ranking helps you determine whether content is performing as you expect it to.






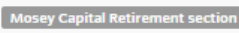

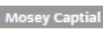


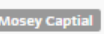

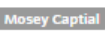

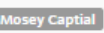
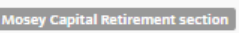



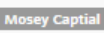


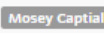
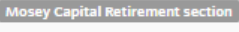

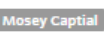
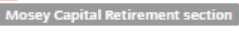

To download the table data for up to 250 topics, click the **Download** icon in the lower right corner.

The drop down menu lets you show Top Topics, any filter selections that you have saved, and any filter selections that others have shared with you.

Topics in Content 		Top Topics 	Volume 	Interactions	Uniques 	IPU 
1.	 Pension		5	104	40	2.60
2.	 Germany		6	76	39	1.95
3.	 Western world		2	73	39	1.87
4.	 Retirement		2	79	38	2.08
5.	 Developed country		1	72	38	1.89
6.	 Life expectancy		1	72	38	1.89
7.	 Ideology		1	72	38	1.89
8.	 Society		1	72	38	1.89
9.	 Management		17	62	19	3.26
10.	 Investment		15	60	19	3.16
+ View More						





Content View


The **Content** view shows the number of interactions (from highest to lowest) that each content item had.

Content 	Interactions	Uniques 	IPU 
1.  Retirement  	72	38	1.89
2.  How the assets test affects the age pension  	16	16	1.00
3.  10 Things We All Hate About Finance 	17	13	1.31
4.  Debt Management 	18	10	1.80
5.  Services  	14	9	1.56
6.  Economy 	10	8	1.25
7.  Banking 	10	8	1.25
8.  Our People	9	7	1.29
9.  To gift or not to gift? What about your pension?  	8	7	1.14
10.  Retire at 65 but don't retire your money  	7	7	1.00
+ View More			

Sections view











The **Sections** view shows the number of interactions (from highest to lowest) that each section's content had.


Sections 	Volume 	Interactions	Uniques 	IPU 
1. Mosey Capital	46	233	43	5.42
2. Mosey Capital Retirement section	14	104	28	3.71
3. Travel Site	80	84	11	7.64
4. Fashion Blog	19	33	5	6.60
5. Tech Blog	16	12	4	3.00
6. Inspirational content	6	10	2	5.00



Sources view

The **Sources** view shows the number of interactions (from highest to lowest) that each source's content had.

Sources 	Volume 	Interactions	Uniques 	IPU 
1.  moseycapital.epi-uk.net	50	247	43	5.74
2.  century.epi-us.net	9	194	21	9.24
3.  salesdemotravel.epi-uk.net	80	84	11	7.64
4.  salesdemofashion.epi-uk.net	19	33	5	6.60
5.  salesdemoepi.epi-uk.net	16	12	4	3.00
6.  gartner-pe2020.epi-uk.net	7	12	2	6.00





Referrer views

The Referrer views are as follows.


- **Referrers.** Sites that link to your content. You can filter these to determine the content that engages visitors from each referrer.

- **Referring Campaigns.** Marketing campaigns in which you track clicks by adding value to your marketing links, such as Google's **utm_campaign**. You can filter these to determine the performance of content by campaign.
- **Referring Mediums.** Marketing channels, such as Social and PPC, where you add values to marketing links such as Google's **utm_medium**. You can filter these to determine performance of content by channel.
- **Referring Sources.** Tracks clicks from places where your content is linked, such as Facebook or Newsletter. You add values to marketing links such as Google's **utm_source**. You can filter these to determine performance of content by linked source.

Referrers ?	Interactions	Uniques ↓	IPU ?
1. salesdemo.idio.co	16	5	3.20
2. facebook.com	10	1	10.00
3. google.com	1	1	1.00
			
Referring Campaigns ?	Interactions	Uniques ↓	IPU ?
1. newsignup	5	1	5.00
			
Referring Mediums ?	No Data Available		
Referring Sources ?	No Data Available		

Profiles

The **Profiles** view shows individuals that interacted with your content, ordered from most to least interaction.

Profiles 	Interactions
<p>1. Profile #551 Idio Visitor Id: 0c341d41-8979-40cb-8ef3-e3c6941984cc Idio: 551 Epi Device Id: 619a23d4-b064-42b5-93a7-4ecd27648fe6 and b8c2db64-6774-45ad-82cd-c32971f63bcd</p>	32
<p>2. Profile #611 Epi Device Id: 478c8e9a-1a85-4c93-b06c-1e70a26d5b3f and 8a2f2966-5287-46b6-986c-9d4b20511f95 Idio: 611 Idio Visitor Id: a8c6ab32-c645-4eb5-a941-abbbf03c93de</p>	29
<p>3. Profile #656 Epi Device Id: 9106e227-f736-413c-ba76-3b03d3cbc08c and f6f5b86b-7d48-4efc-8650-c9258776030a Idio Visitor Id: 785e875a-6e3b-473b-89c2-0cf7bb92fc43 Epi Device Ids: 9106e227-f736-413c-ba76-3b03d3cbc08c and f6f5b86b-7d48-4efc-8650-c9258776030a Idio: 656</p>	27
<p>4. Profile #583 Epi Device Id: 26297ef9-ed54-435e-bd33-dc4f6cd8055, 55739341-9d1e-4928-9750-a7e20da3bee5 and 64ad10ad-11fc-4395-915c-47f0bcb4475 Idio: 583 Epi Device Ids: 26297ef9-ed54-435e-bd33-dc4f6cd8055 and 55739341-9d1e-4928-9750-a7e20da3bee5 Idio Visitor Id: a71c8780-4c2d-4ee3-abaf-176b50bdc43</p>	26
<p>5. Profile #35 Epi Device Id: 3f4ecaee-fe45-40c3-a53f-8d43d894ccaa, c8bd5c68-bdb8-4f97-849e-b66710869fe5 and d63afae2-b164-4ba4-af50-f2692f562062 Idio Visitor Id: 06df2ac2-6fcb-4d23-bdfd-7367f2247ea1, 0bb922fe-0cc5-4b64-83fd-5f30bd8a418d and 9 others Epi Device Ids: 3f4ecaee-fe45-40c3-a53f-8d43d894ccaa, c8bd5c68-bdb8-4f97-849e-b66710869fe5 and fef85f7d-c77d-49d0-ac05-36aa9ee48e68 Idio: 35, 328 and 8 others</p>	22

To examine a profile, click a profile ID. You can also go to **Insight > Profiles** and enter a profile ID (or any other identifier such as *idio-visitor-cookie*) and click **Go**. Then click the profile ID.

🔍 Go

Profile #35

Created: on 04/11/2019 Epi Device Id: 3f4ecaee-fe45-40c3-a53f-8d43d894ccaa, c8bd5c68-bdb8-4f97-849e-b66710869fe5 and d63afae2-b164-4ba4-af50-f2692f562062 Idio Visitor Id: 06df2ac2-6fcb-4d23-bdfd-7367f2247ea1, 0bb922fe-0cc5-4b64-83fd-5f30bd8a418d and 9 others Epi Device Ids: 3f4ecaee-fe45-40c3-a53f-8d43d894ccaa, c8bd5c68-bdb8-4f97-849e-b66710869fe5 and fef85f7d-c77d-49d0-ac05-36aa9ee48e68 Idio: 35, 328 and 8 others

The **Profiles** view lets you examine details about a visitor profile. Data includes:

- **Profile Created.** Date.
- **First Interaction.** Date.
- **Last Interaction.** Date.
- **Identifiers.** Content Recommendations ID, email, marketing automation ID, and so on.

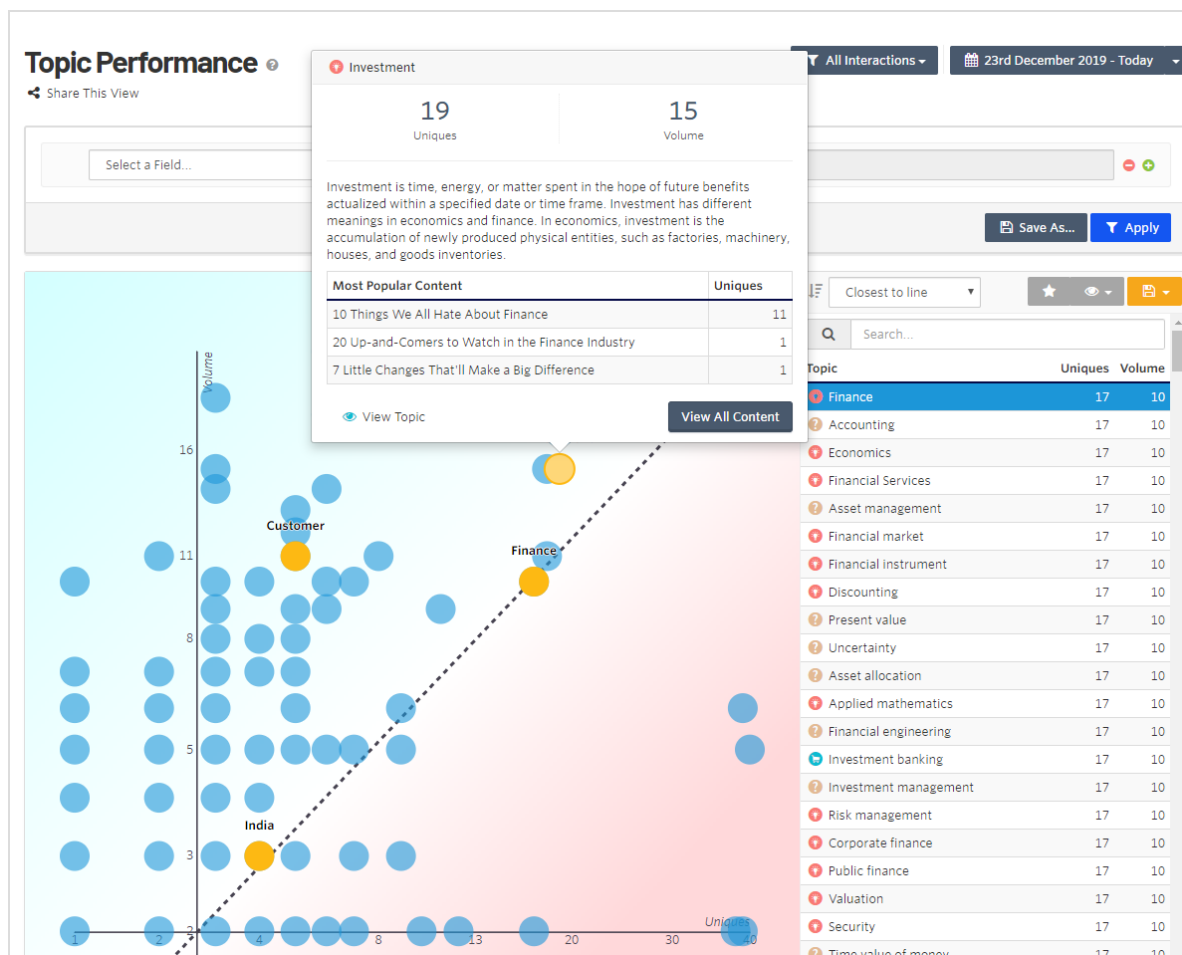
- **Conversion.** Shows which conversions were made based on the goals.
- **Interest Profile of topics.** Heat map of topic interests.
- **Recommendations.** Sent to the visitor (either via widget or email).
- **Interactions.** Made by the visitor.



Note: Date labels are in a dd/mm format.

Topic performance

The **Topic Performance** view shows a graph of Volume versus Uniques. The view plots topics on the graph that you can select for information about the topic. You also can select a category of topics, which highlights on the graph for easy analysis. You can save selections for later use.

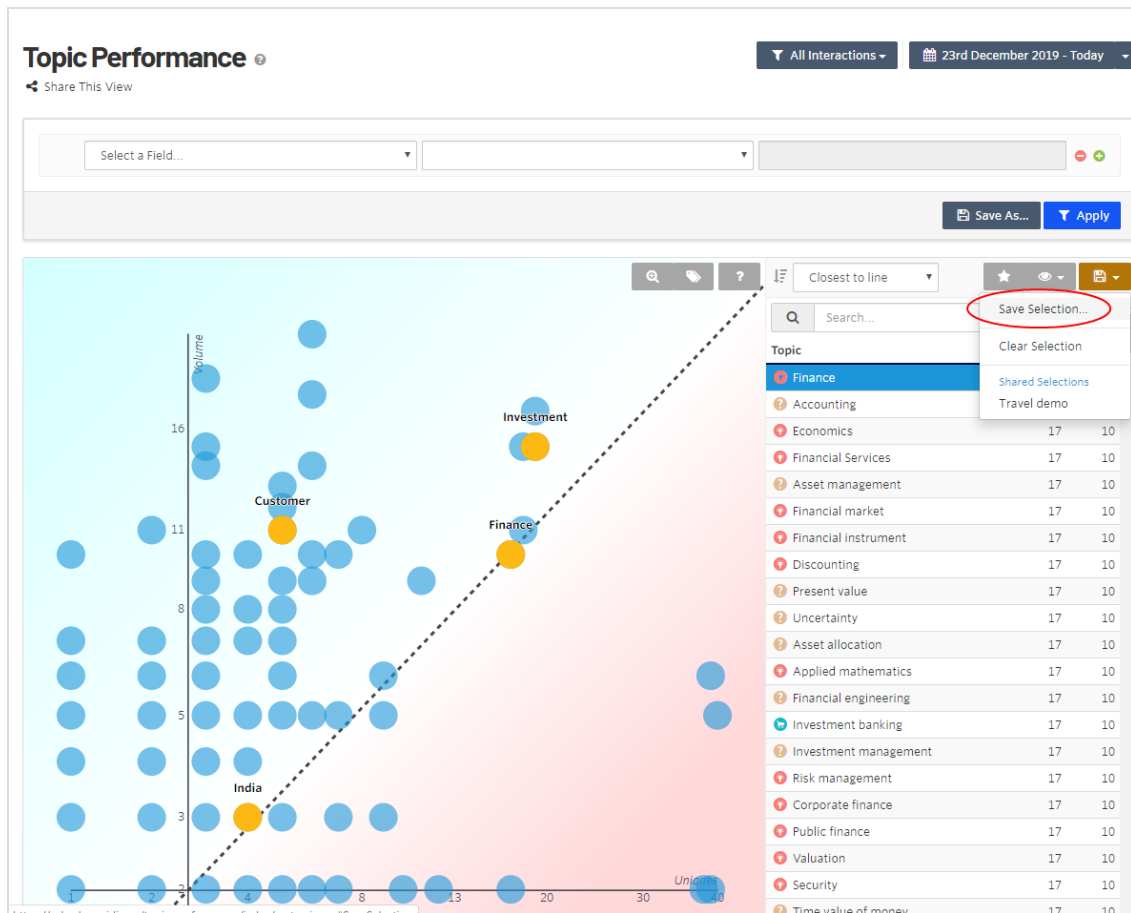


- Yellow dots show topics in the current topic selection that you identified as relevant.
- Blue dots show topics in your content that are not as relevant to your topic selection.

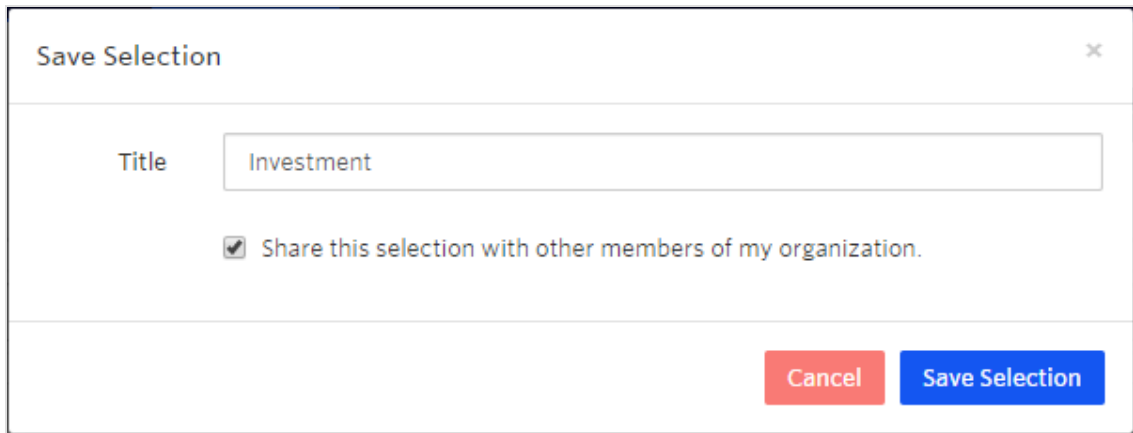
- The Y axis represents the total number of content pieces that contain a particular topic.
- The X axis represents the number of unique visitors that interacted with content that contains a topic.
- The diagonal dotted line represents the ideal amount of content per the number of unique interactions.
- Topics above the dotted line are saturated (meaning you have plenty of content about the subject but fewer people are interested in the topics). You should not focus on these for content production.
- Topics below the dotted line are at a deficit (meaning you do not have enough content about the subject, because people want to know more about the topics). You should increase content production for these topics.
- You can [filter](#) and save Interactions views for frequent use, and [share a view](#) with a linked URL. Saved filters are shown in the **All Interactions** menu.

Creating a topic list

1. Click a bubble on the graph, or select a topic from the list, and click **Save Selection**.

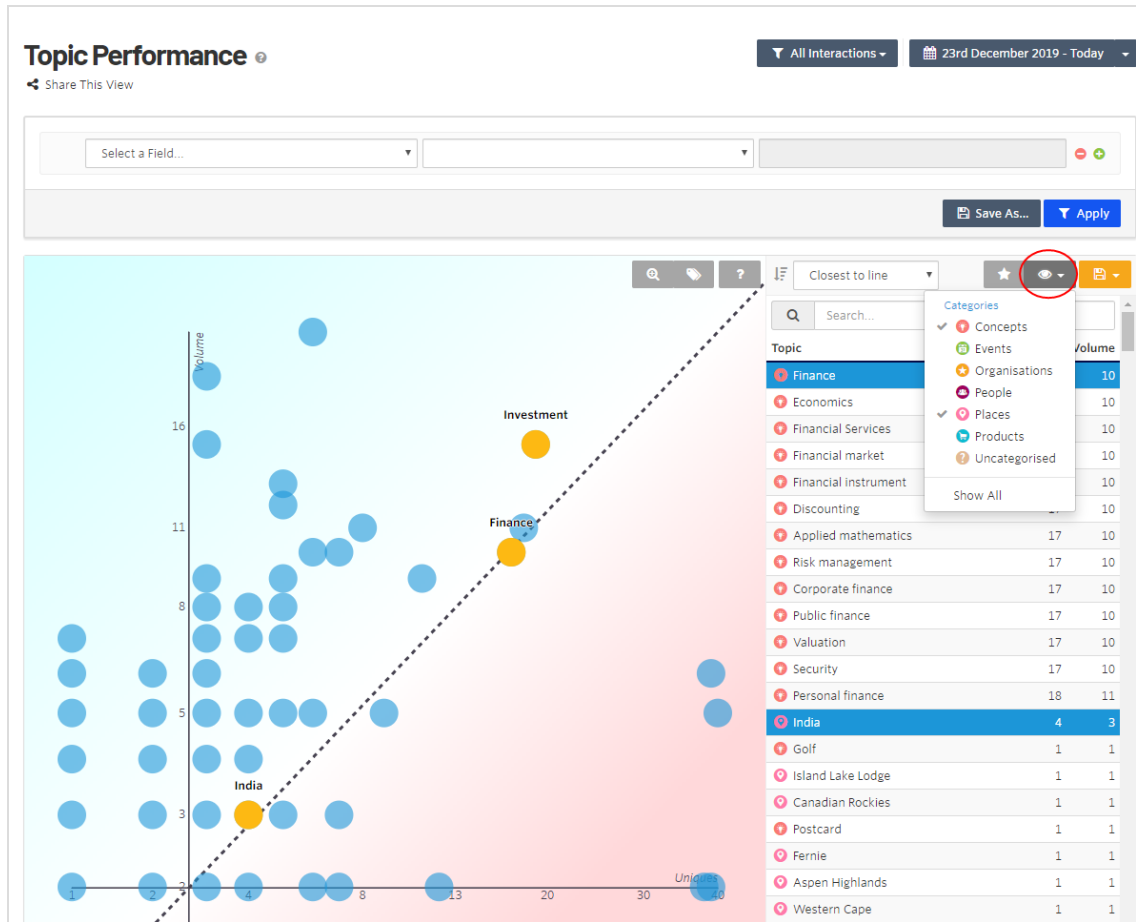


2. Enter a title for the selection. Enable the check box to make the selection available to other members of your organization; disable to make the selection for you only.

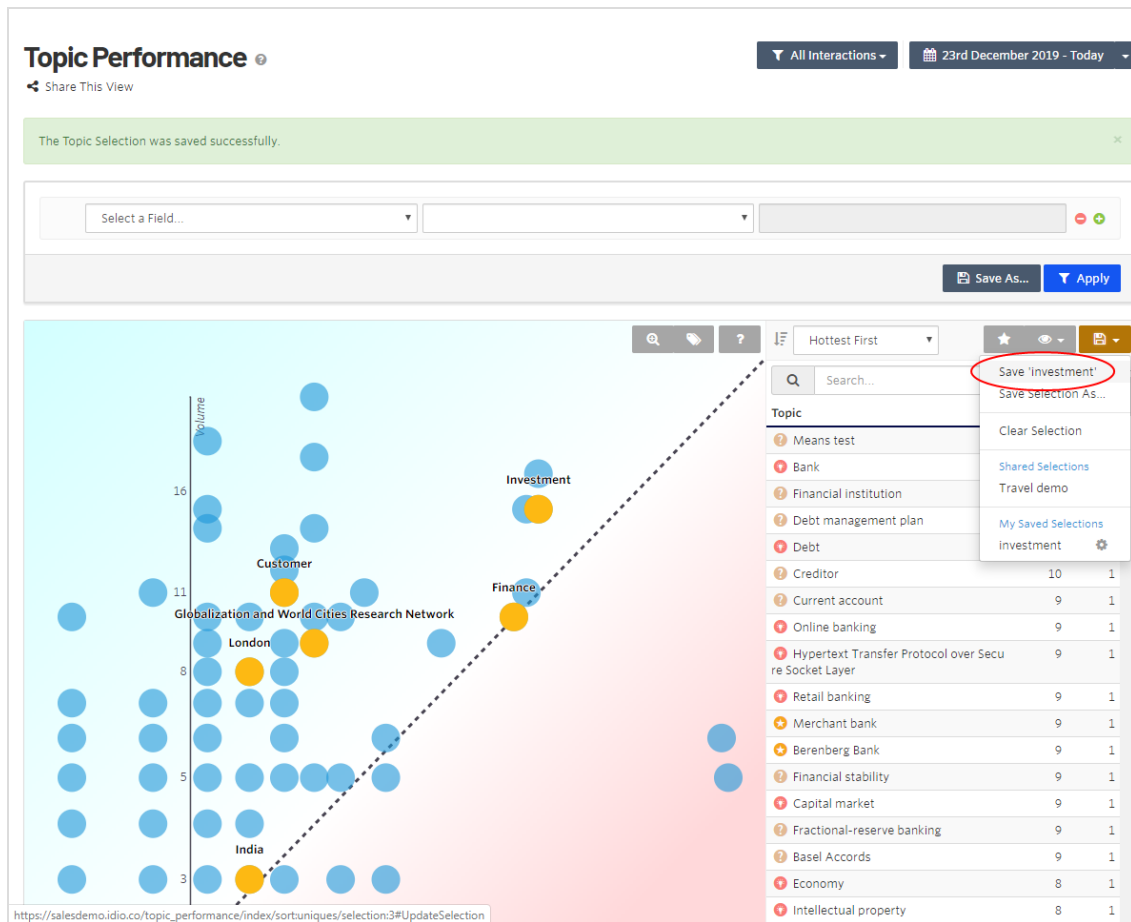


The image shows a 'Save Selection' dialog box with a title bar containing the text 'Save Selection' and a close button 'x'. The main area contains a 'Title' label followed by a text input field containing the word 'Investment'. Below the input field is a checked checkbox with the text 'Share this selection with other members of my organization.'. At the bottom right, there are two buttons: a red 'Cancel' button and a blue 'Save Selection' button.

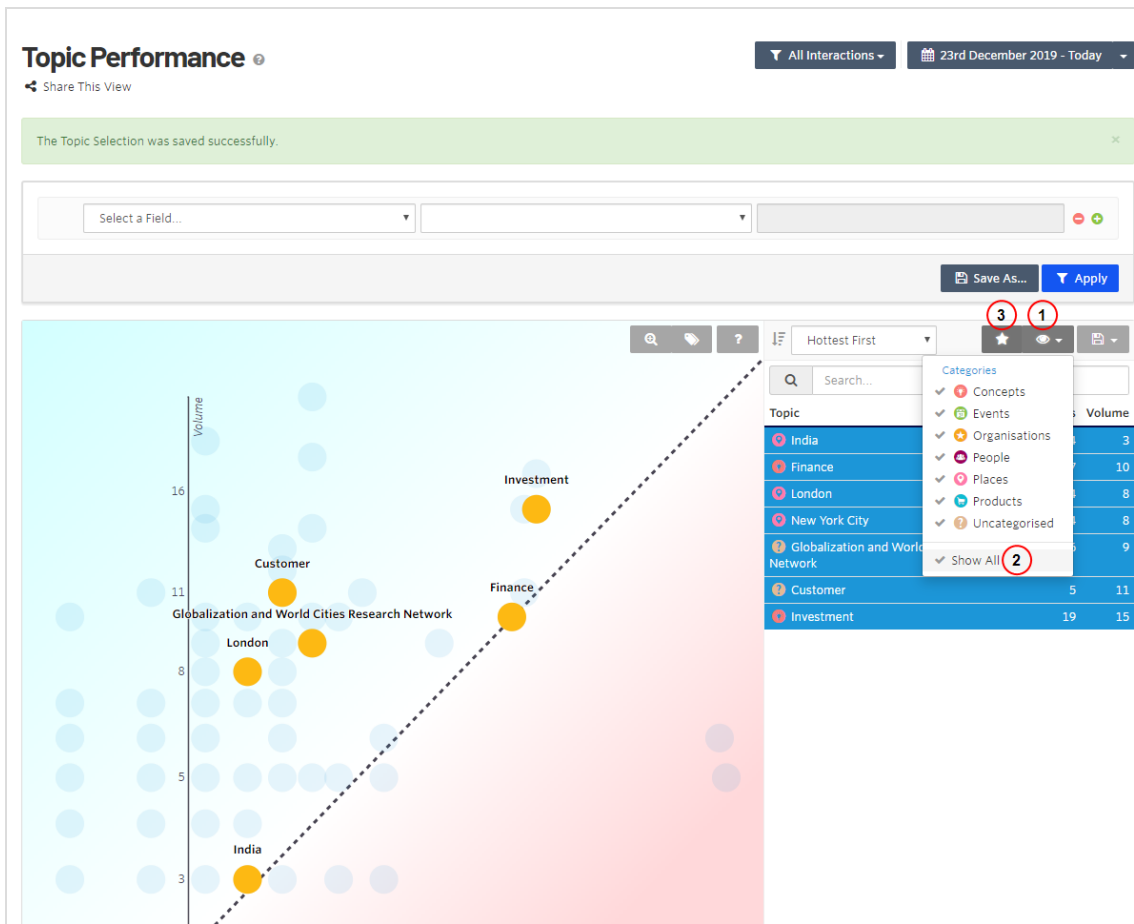
3. You can divide the topic list by category, and add relevant topics from each category to the list. Click **View** to display the **Categories** and view each category one at a time, reducing the number of topics displayed on the graph.



4. In each category, select topics that are relevant, such as *The top 20 topics*, or *a selection based on relevance to your brand*.
5. Click **Save** to save the topics to your list and select **Save {your last saved title}**.



- After you saved all the topics you want, select **View > Categories > Show All**, then select the **Highlight Selected Topics (Star icon)** to include or remove all other topics from the dashboard. The graph displays your chosen topics from all categories by "hottest first" topics.



Content Utilization

The **Content Utilization** view shows a graphical representation of topic performance.

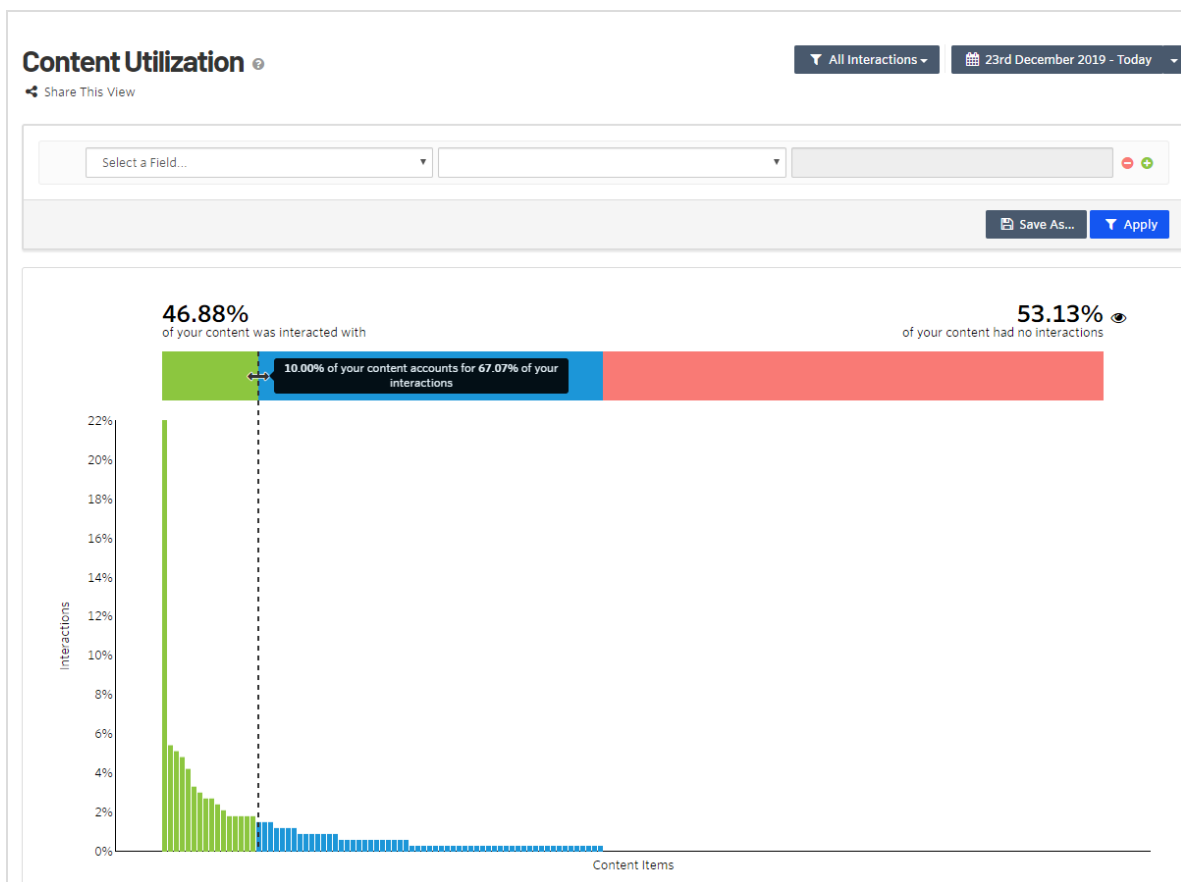
- **Green section.** Shows the higher performing topics.
- **Blue section.** Shows the lower performing topics.

Note: You can drag the dotted line separator to see what percentage of topics make up various percentages of your interactions.

- **Red section.** Shows the percentage of topics that have no interaction.

Note: Click the eye icon to filter out the "no interaction" topics to focus on topics getting interaction. Also consider why these topics have no interaction. Do they have value?

You can [filter](#) and save Interactions views for frequent use, and [share a view](#) with a linked URL. Saved filters are shown in the **All Interactions** menu.



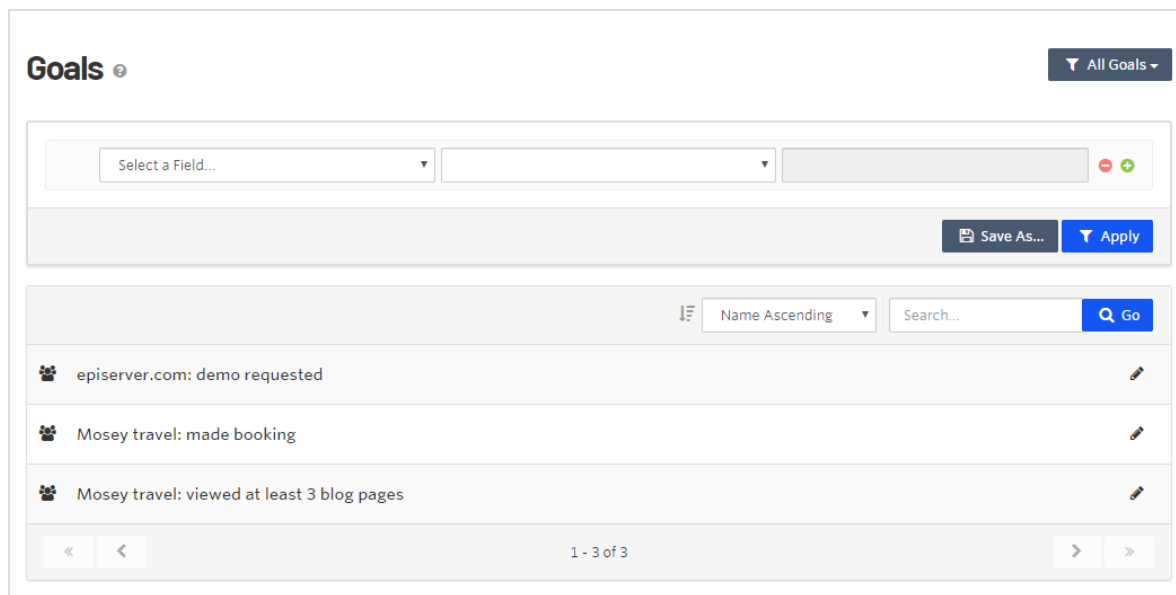
Goals

The **Goals** view shows conversions. Goals are set up during the Content Recommendations implementation.

A goal is a set of behaviors that you want someone to perform, such as filling out a form, requests for demos, downloading a resource, or *viewing three pages on the Financial site*. Use goals to understand visitor interests, based on how many visitors meet the goal's rules. If many people view pages that contain related topics, they may be very interested in a larger topic such as *Retirement planning*.

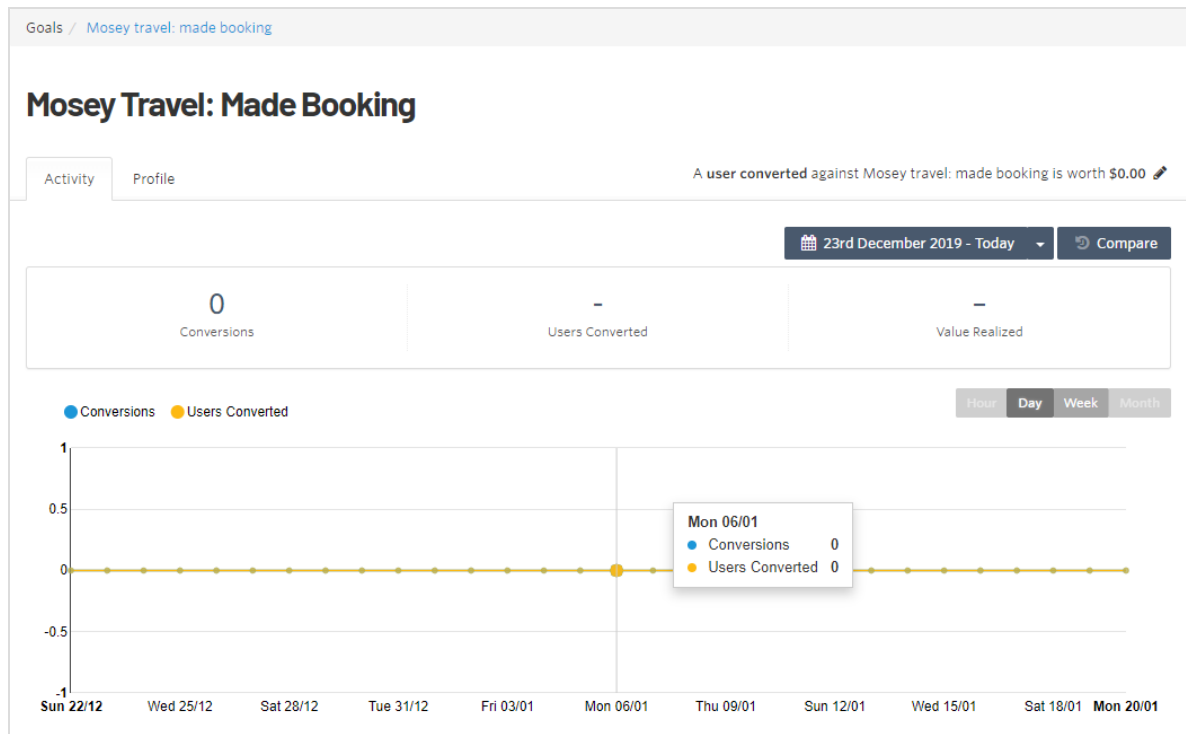
Tip: Developers create goals using JavaScript. See [Creating goals and tracking conversions](#) on Optimizely World for more information.

You can [filter](#) and save a Goals view for frequent use, and [share a view](#) with a linked URL. Saved filters are shown in the **All Goals** menu.



The **New Conversions** view shows the number of **Conversions** and **Users Converted**. The graph shows when conversions occur.

The **Profile** tab shows an aggregate view of topics and their relevance to the interest profiles who converted on the goal.



Tip: Date labels are in dd/mm format.

Creating goals and tracking conversions

You can track conversions against a goal by tracking a convert event.

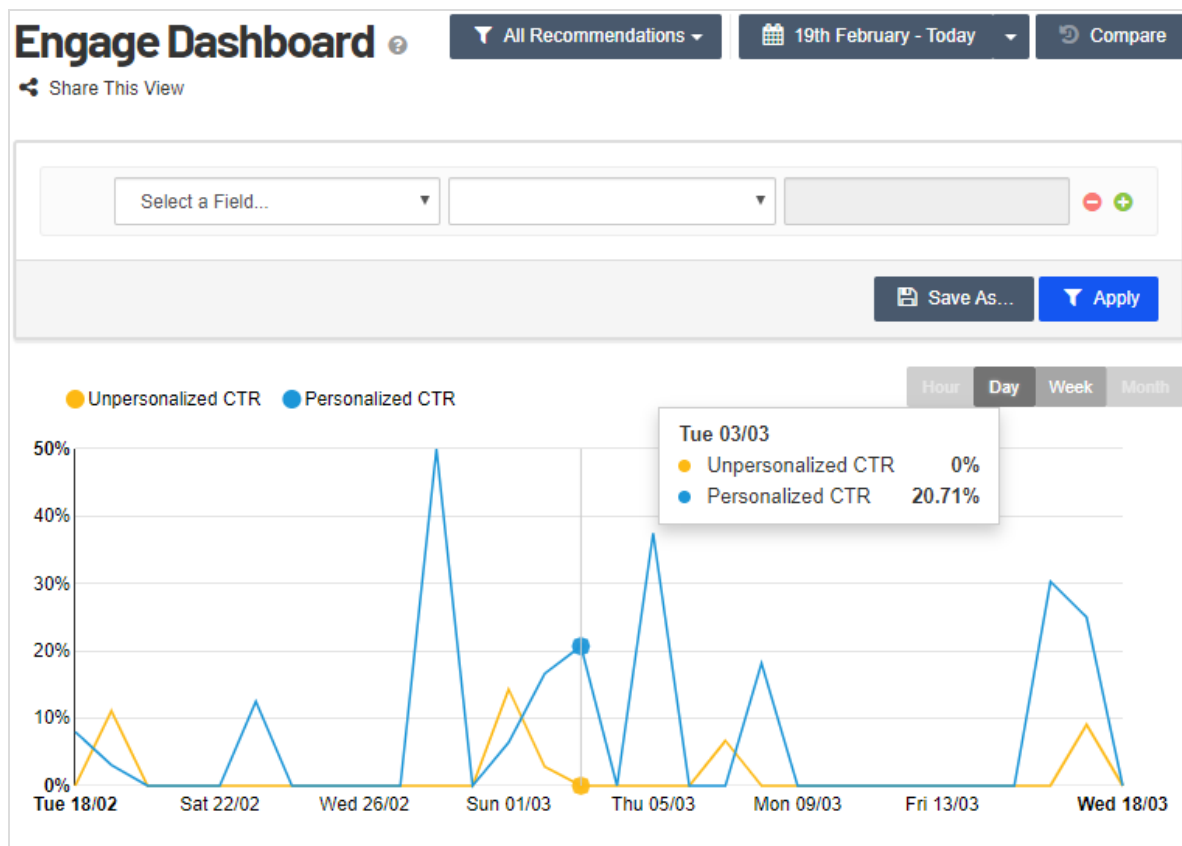
Note: The goal name must be less than 255 characters in length. If the goal does not already exist, it will be created.

For example, you could record a conversion against the 'Subscribed to Newsletter' goal:

```
_iaq.push(['goal', 'Subscribed to Newsletter']);
_iaq.push(['track', 'convert']);
```

Engage Dashboard

The **Engage Dashboard** shows the performance of deliveries to the web or email. Deliveries include retargeting, blocks on a web page, and personalized email that contains relevant content based on previous interactions and interests. See [Setting up deliveries](#) in this topic.



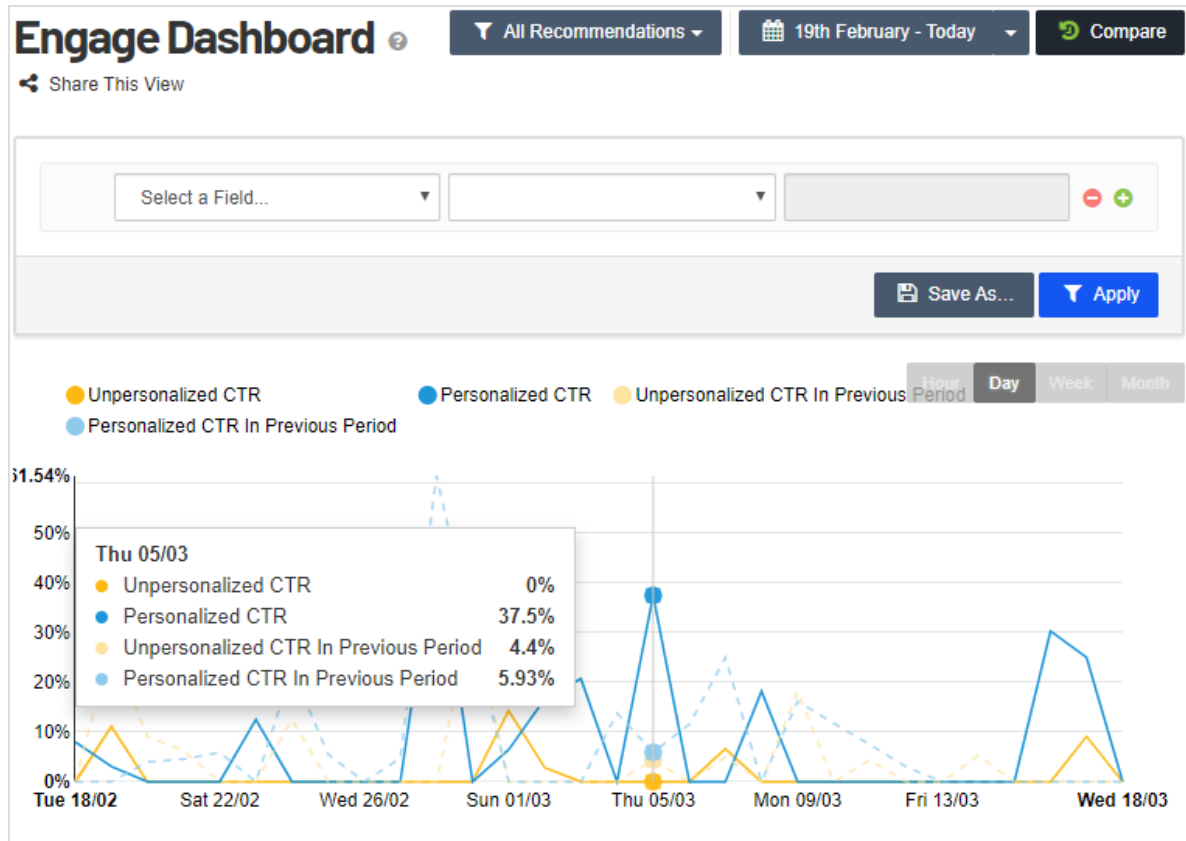
- An A/B test for each widget compares the click-through rate (CTR) of personalized recommendations versus unpersonalized recommendations.
- You can link a delivery to conversion of a goal.
- You can [filter](#) and save Recommendations views for frequent use, and [share a view](#) with a linked URL. Saved filters are shown in the **All Recommendations** menu.

- You can adjust the date range for specific views of the data. Hover over the chart to view activity on a specific date.

Note: Date labels are in a dd/mm format.

Comparing periods

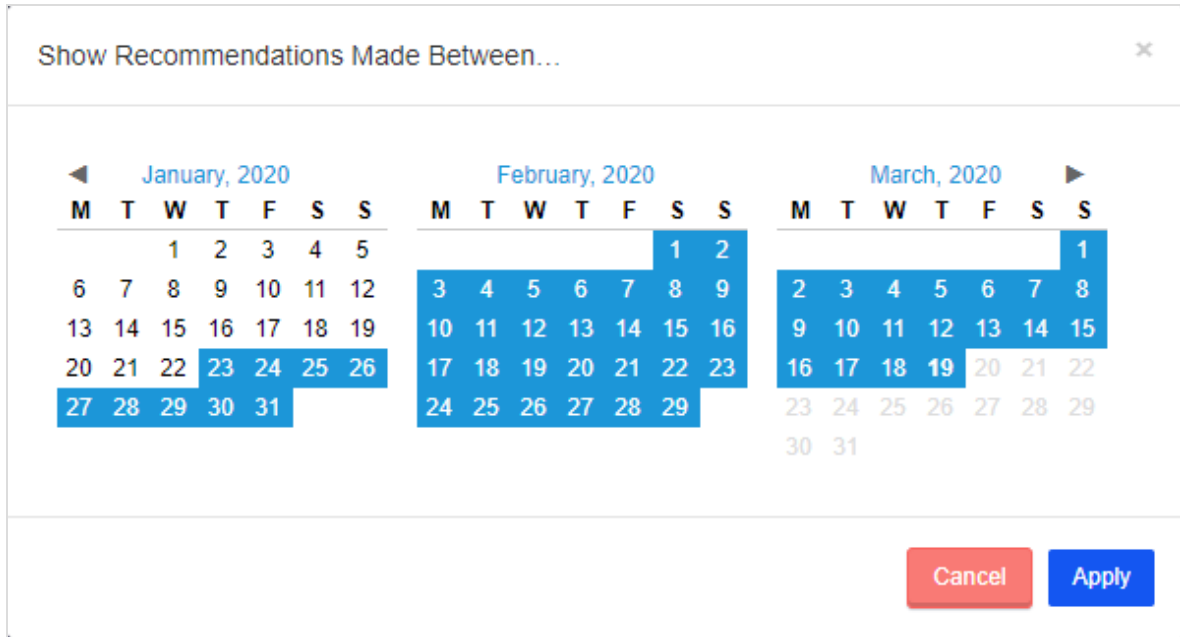
Click **Compare** to compare the previous period to the current one. The dashed lines show the previous period. You can also hover over a specific date for discrete comparisons.



To select a custom date range:

- Open the date drop-down.
- Select **Custom Period**.

3. Click the begin and end dates.



The **Engage Performance** view shows the click-through rate (CTR) for each content item and compares the unpersonalized CTR to the personalized CTR.

Engage Performance	Unpersonalized CTR		Personalized CTR
Overall Clicks / Recommendations	0.71% 7 / 991	↑ 1,142.25% UPLIFT	8.82% 62 / 703
Web Clicks / Recommendations	0.71% 7 / 991	↑ 1,142.25% UPLIFT	8.82% 62 / 703
Mosey Capital widget Clicks / Recommendations	0.23% 2 / 884	↑ 91.30% UPLIFT	0.44% 2 / 457
Travel Widget Clicks / Recommendations	23.08% 3 / 13	↑ 32.89% UPLIFT	30.67% 50 / 163
Mosey Capital Retirement widget Clicks / Recommendations	0.00% 0 / 82	- -	0.00% 0 / 28
Fashion Widget Clicks / Recommendations	16.67% 1 / 6	↑ 86.14% UPLIFT	31.03% 9 / 29
Tech Widget Clicks / Recommendations	16.67% 1 / 6	↓ 76.90% REDUCTION	3.85% 1 / 26

You can hover over a content item to filter that item to focus your view.

Web Clicks / Recommendations	0.79% 8 / 1008	↑ 1,302.53% UPLIFT	11.08% 81 / 731
Mosey Capital widget Clicks / Recommendations	0.22% 2 / 889	↑ 113.64% UPLIFT	0.47% 2 / 424
Travel Widget Clicks / Recommendations	25.00% 4 / 16	↑ 21.60% UPLIFT	30.40% 69 / 227

Filter on *Mosey Capital widget*

Exclude *Mosey Capital widget*

The **Conversion Performance** view:

- Shows the conversion rate for each goal.
- Compares unpersonalized conversions to personalized ones.

Conversion Performance	All Goals	Unpersonalized	Personalized
People Recommended To Split		72 58.54%	51 41.46%
Clicked a Recommendation Click Through Rate		1 1.39%	10 19.61%
Converted Click Through Conversion Rate		0 0.00%	0 0.00%

Setting up deliveries

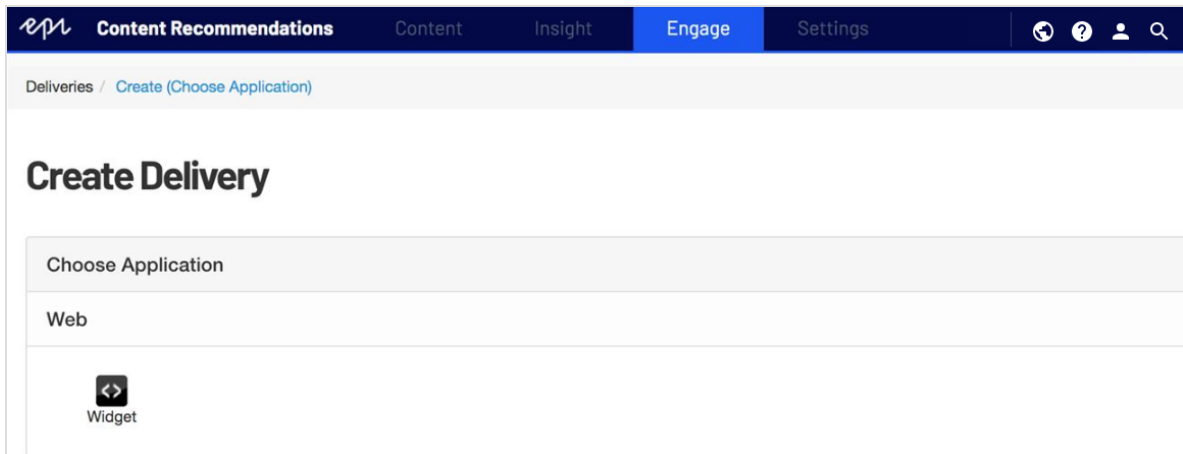
Note: The menu item **Deliveries** requires extended user rights. Contact your Content Recommendations administrator.

You can set up deliveries to drive personalized marketing to key customers.

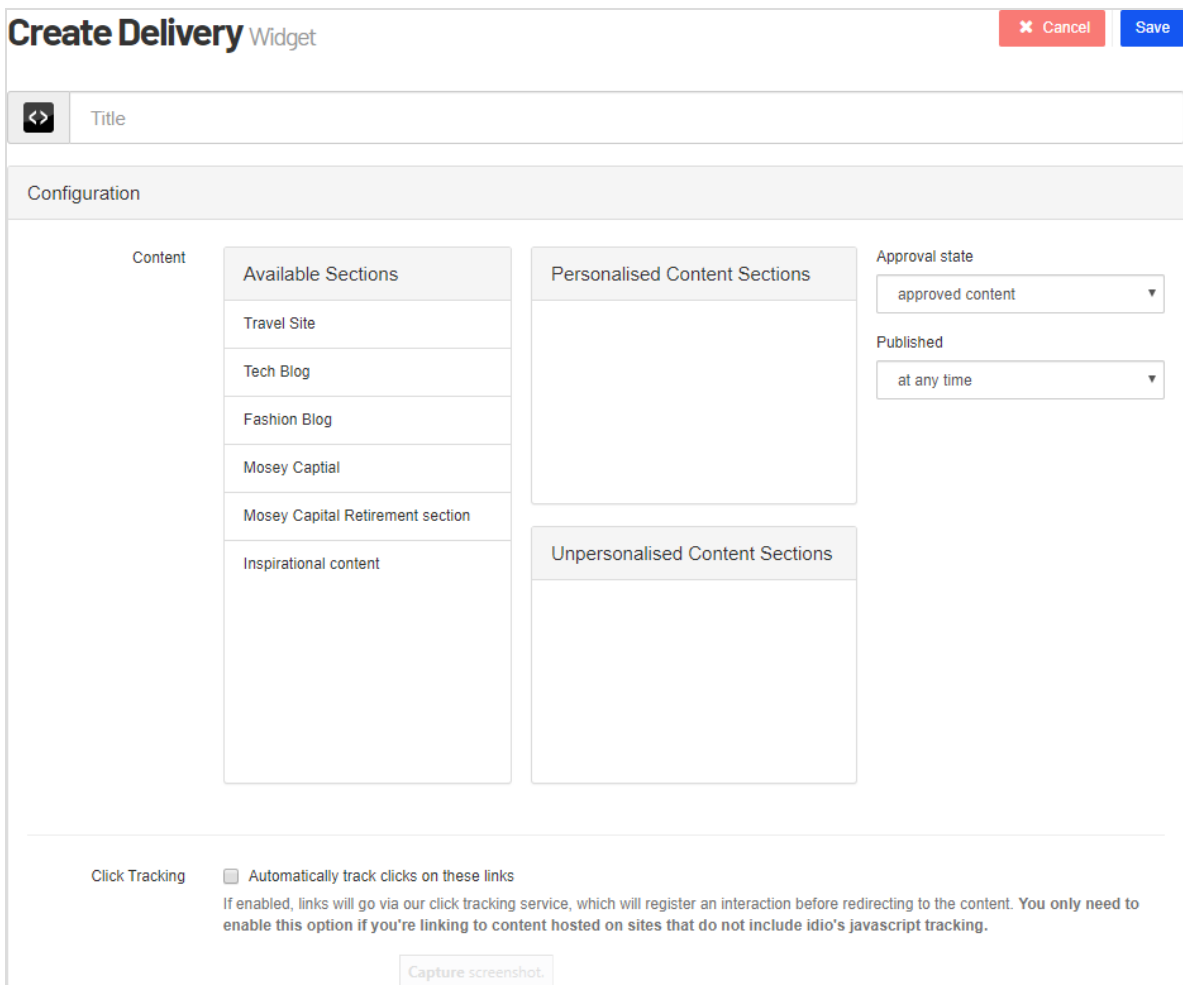
The screenshot displays the 'Deliveries' management interface. At the top left is the title 'Deliveries' and a '+ Create Delivery' button. Below the title are two tabs: 'Deliveries' (active) and 'Bin'. The main area contains a list of seven delivery items, each with an icon, name, type, and source URL. Action icons for copy, delete, and edit are provided for each item. A pagination bar at the bottom shows '1 - 7 of 7' and navigation arrows.

Icon	Name	Type	Source	Actions
	CMS (API)		api.idio.co	Copy, Delete, Edit
	ET (Exacttarget)			Copy, Delete, Edit
	Fashion Widget	(Widget)		Copy, Delete, Edit
	Mosey Capital Retirement widget	(Widget)		Copy, Delete, Edit
	Mosey Capital widget	(Widget)		Copy, Delete, Edit
	Tech Widget	(Widget)		Copy, Delete, Edit
	Travel Widget	(Widget)		Copy, Delete, Edit

To create a delivery, click **Create Delivery**. The Choose Application view appears.



Click **Widget**. The **Create Delivery** view appears.



- **Title.** Enter a title for this Delivery widget.
- **Available Sections.** Drag the sections you want to make available to the widget to the **Personalized Content Section** part of the configuration.
 - If the **Unpersonalized Content Section** is empty, Content Recommendations serves the most recent content from the **Personalized Content Section**.
 - If the **Unpersonalized Content Section** is populated, Content Recommendations serves content from the selected sections in reverse chronological order.
- **Approval.** Select the state of content that can be served by this widget.
 - **Approved or unapproved content.** Serve any content.
 - **Approved content.** Serve only content that is approved.
 - **Unapproved content.** Serve only content that is unapproved.
- **Published.** Select the time of delivery from any time up to the last 365 days.
- **Click Tracking.** Enable to use Optimizely's tracking service. If you link to content that is hosted on sites that do not include Optimizely's JavaScript tracking, disable this option.

Note: You should leave this unchecked because most content used for Recommendations contains the tracking script on site already. However, if you are recommending content “off site” (that is, to a different domain), checking this box adds a tracking redirect to all the recommendations.

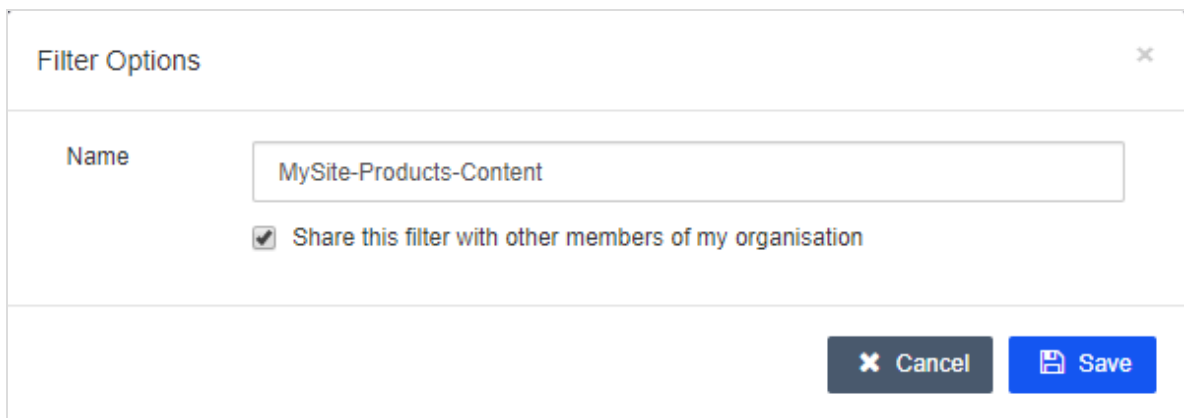
Filtering Content Recommendations

Filters let you create granular views of data. A filter is composed of a field, conditions, and target. For example, *Published* (field), *After* (condition), *January 1* (target). Content view, Insight view, and Engage view each have separate filters.

You should organize compound filters from widest-to-narrowest focus. For example, set a compound filter using source, main category or folder, and folder exclusions like so:

- **Source—is at least one of—***www.MySite.com*
(You have multiple sites and want to analyze only one of them.)
- **Original URL—contains—***/Products/*
(You want to see how your products are performing with site visitors.)
- **Original URL—does not contain—***/archived-products/*
(You do not want to see products that are discontinued or otherwise archived.)
- **Original URL—does not contain—***/discounts/*
(Exclude discounted products from the analysis.)

After you create one or more filter definitions, save each one so you can view them repeatedly. However, you cannot use a saved filter in another section. (That is, you cannot use a saved Insight filter for Engage data. So create and save filters in each view.)

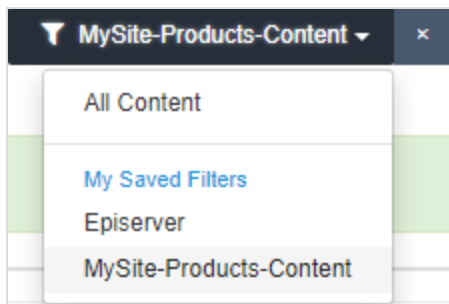


Filter Options

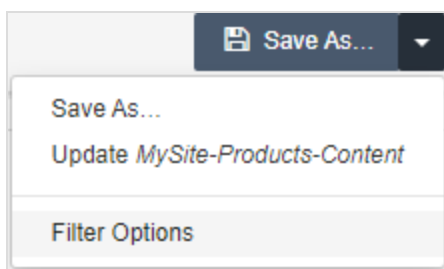
Name

Share this filter with other members of my organisation

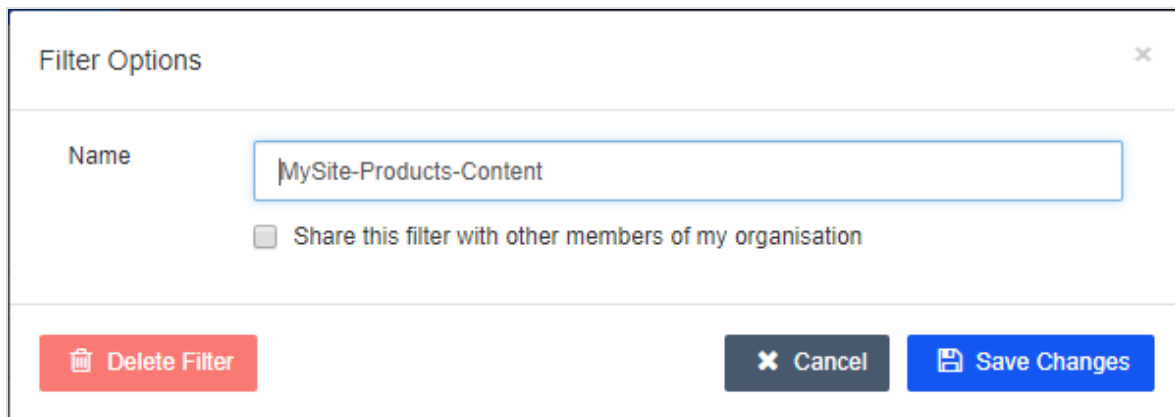
To use a saved filter, open the filter menu in any view and select the filter that you want.



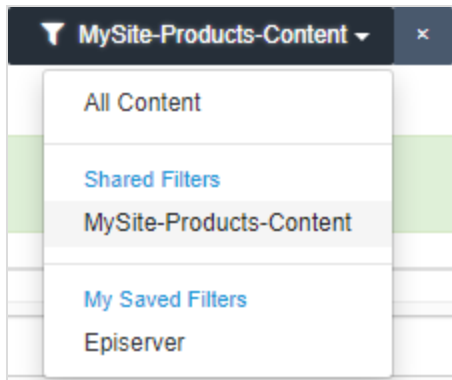
If you modify a filter's criteria, instead of saving a new filter, you can update the saved filter from the **Save As** menu.



Select **Filter Options** to change the filter name, share the filter with others, or delete it.

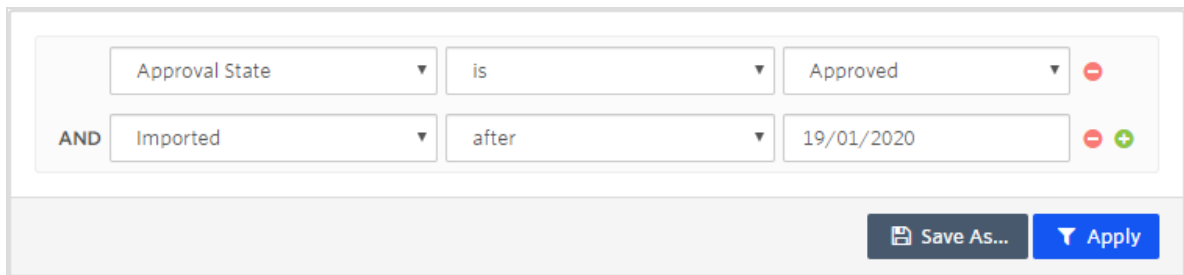


If you share the filter with other members, the filter is moved from **My Saved Filters** to **Shared Filters** in the filter menu.



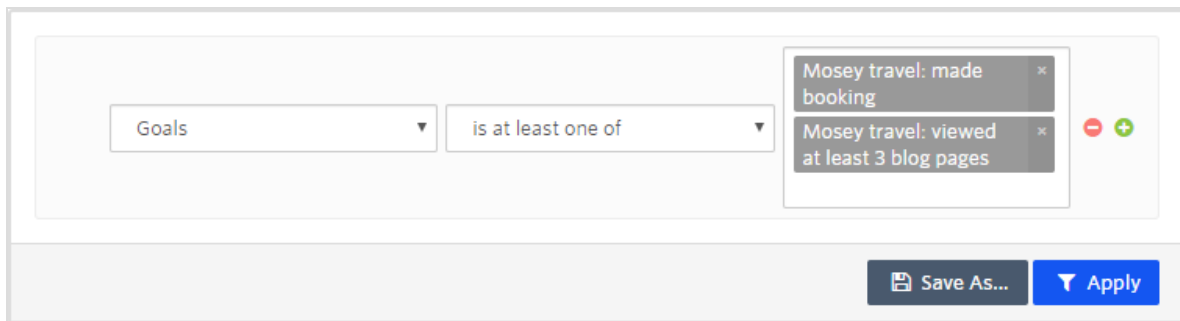
If a content item is marked as **Unapproved**, Engage does not include it in recommendations. To avoid Unapproved content, add the **Approval State** filter to show only approved content. Add a filter for an import date.

Note: An import date corresponds to the first time a user interacted with a piece of content after the Optimizely tracking was put in place. An import date can be weeks, months, or years after the published date.



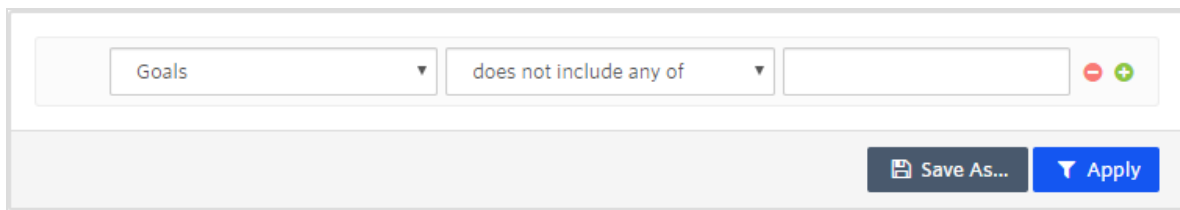
Filtering on multiple goals to content

The following example shows multiple goals.



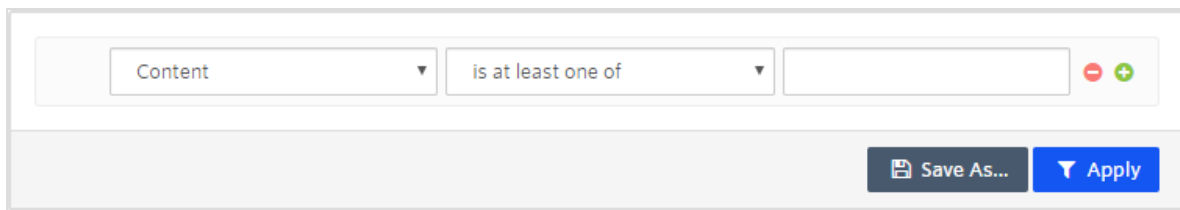
Filtering content that has little or no impact on goals

To understand which content is having little or no impact on goals, change the condition to **does not include** as shown:



Filtering specific content

To see the performance of a specific piece of content, you can set the following field and condition:



Filtering content in a section

Use this filter to see pieces of content in a section:

Sections ▼ is at least one of ▼ - +

Save As... Apply

Filtering pay-per-click (PPC) channel

PPC channel filters are created for you. Contact [Optimizely support](#). Channel filters provide visibility into what drives content consumption.

Referrer ▼ is at least one of ▼

- salesdemotravel.epi-uk.net ×
- salesdemoepi.epi-uk.net ×

- +

Save As... Apply

Content Recommendations settings

The Settings menu lets you configure the Content Dashboard.

- [Configuration](#). Create master or IP address filters.
- [Shared Views](#). Lists views shared by Content Dashboard users.
- [Topic Selections](#). Displays private or shared selections.

Configuration

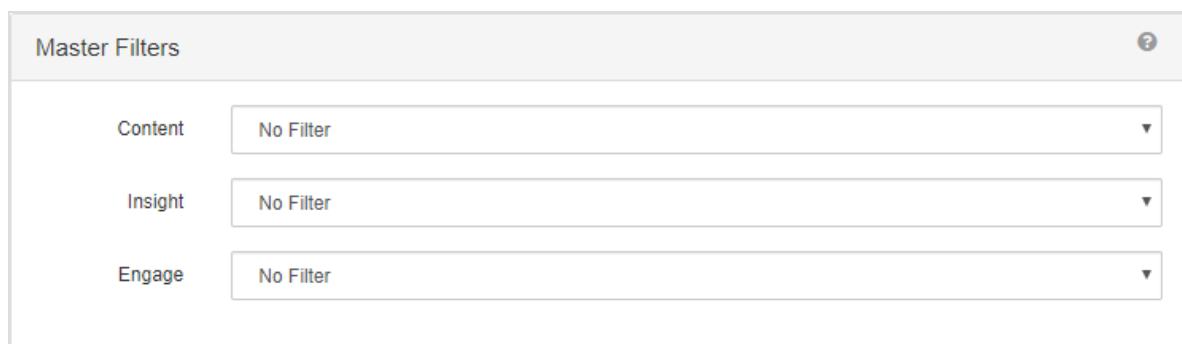
Select **Settings > Configuration** to:

- Create master or IP address filters.
- Specify which hostnames and domains can access this instance of Content Recommendations.

Master filters

If you saved a filter for the Content, Insight, or Engage dashboards, you can select it from the drop-down as the default dashboard view. For example, if you save an Engage dashboard to view only web widgets, and set that filter as your Master Filter for Engage, only web widgets appear when viewing the Engage Dashboard.

Note: Exercise caution when setting up a master filter, because master filters are global for a given view. You should only set up a master filter if you will never need to look into a specific delivery, such as email.



The screenshot shows a configuration panel titled "Master Filters" with a help icon in the top right corner. It contains three rows, each representing a dashboard type: Content, Insight, and Engage. Each row has a label on the left and a dropdown menu on the right. All three dropdown menus are currently set to "No Filter".

Dashboard Type	Filter
Content	No Filter
Insight	No Filter
Engage	No Filter

IP address filters

If you set an IP range, any interactions from that IP range are removed from reporting. This is also retroactive. So if you made many clicks yesterday and then add your IP address, your clicks from yesterday will not show up in reporting. The End IP address is optional.

IP Address Filters
?

Title	Start IP	End IP (optional)	
Title	1.2.3.4	1.2.3.4	✕
<div style="background-color: #333; color: white; padding: 5px 10px; display: inline-block; border-radius: 3px;"> + Add IP </div>			

Whitelist

Enter the hostnames and domains that belong to the Content Recommendations installation. Place each item on its own line.

Note: This whitelist is different from the property whitelist. Property whitelists are for tag-based implementations; configuration whitelists are for NuGet-based implementations.

Whitelist
?

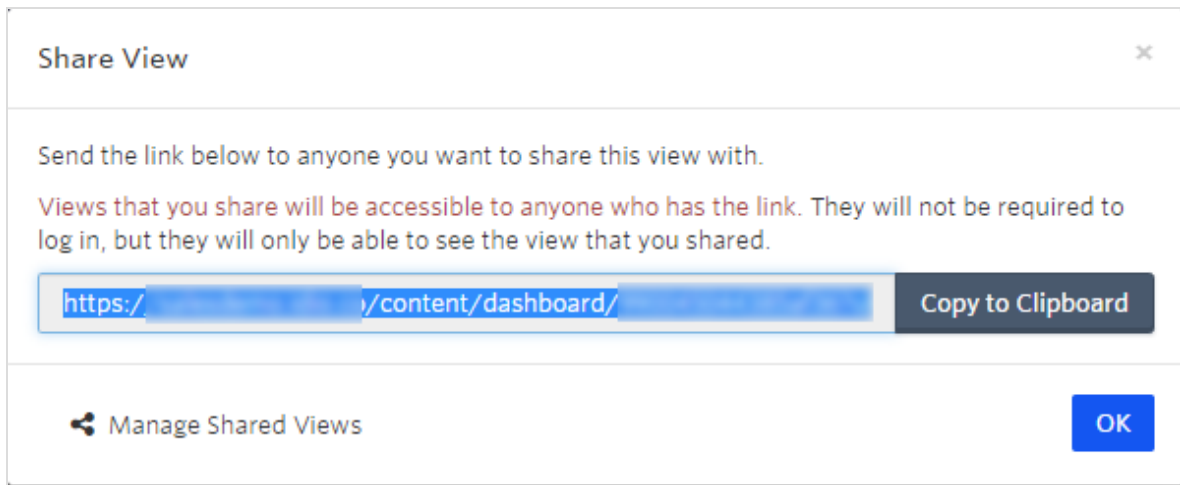
Hostnames

[salesdemofashion.epi-uk.net](#)
[salesdemotravel.epi-uk.net](#)
[salesdemoepi.epi-uk.net](#)
[moseycapital.epi-uk.net](#)
[century.epi-us.net](#)
[gartner-pe2020.epi-uk.net](#)

Whitelist which hostname/domains belong to this instance. Each should be placed on its own line.

Shared views

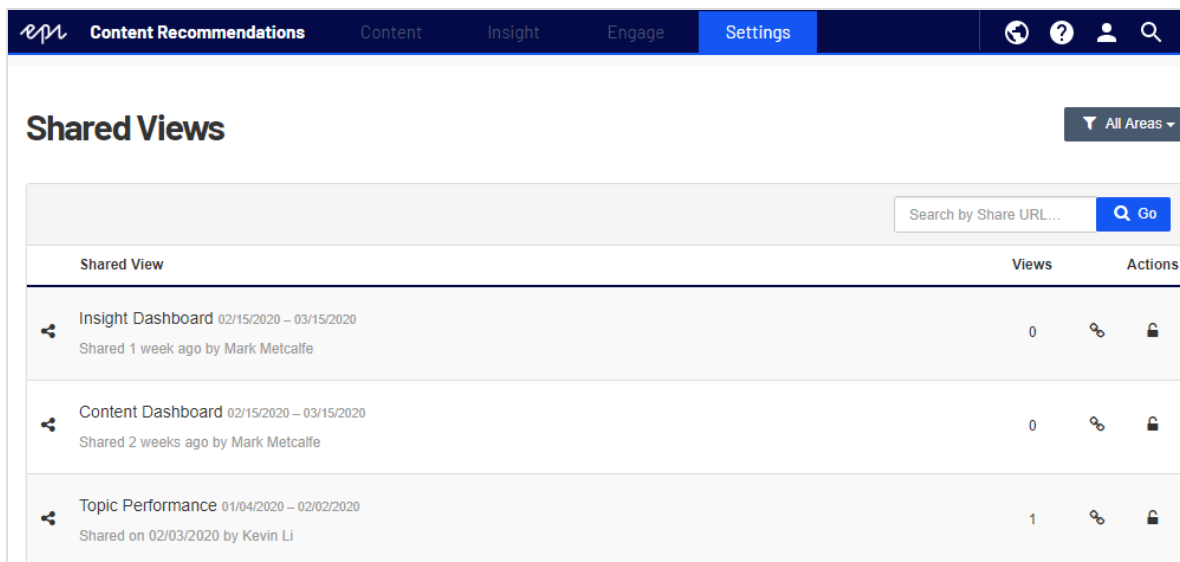
Each dashboard has a **Share this View** link near the title. Click **Share this View** to send a link to someone whom you want to see the data.



To see a list of shared views of the same type (Content, Insight, Engage, Topic Performance), click **Manage Shared Views** from the dialog box.

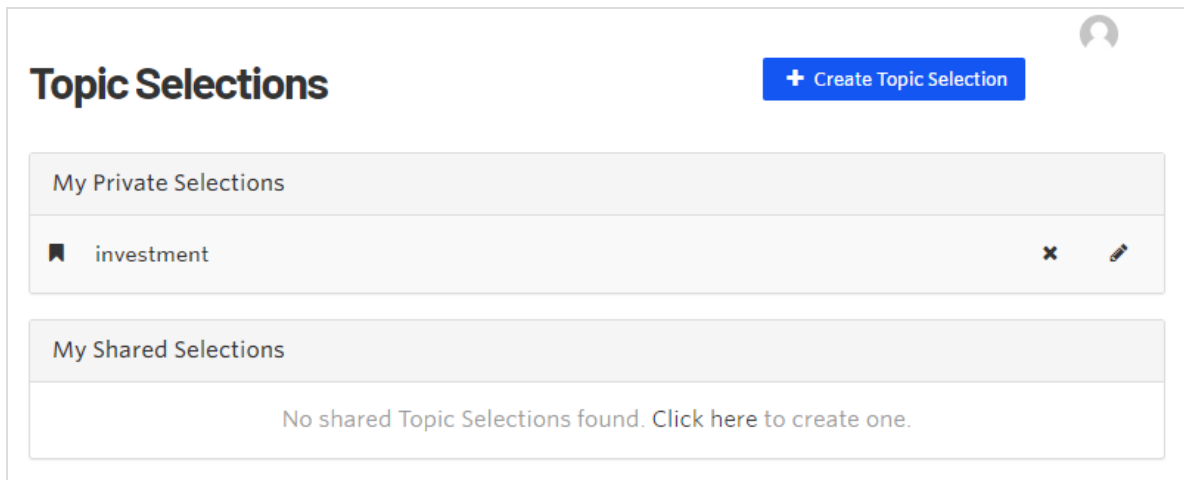
To see all shared views, go to **Settings > Shared Views**. Click any view to see the data.

- Click the link icon to copy the URL to the shared view, to send it to someone.
- Click the lock icon to revoke access (closed lock) to the shared view, or again to reinstate it (open lock).

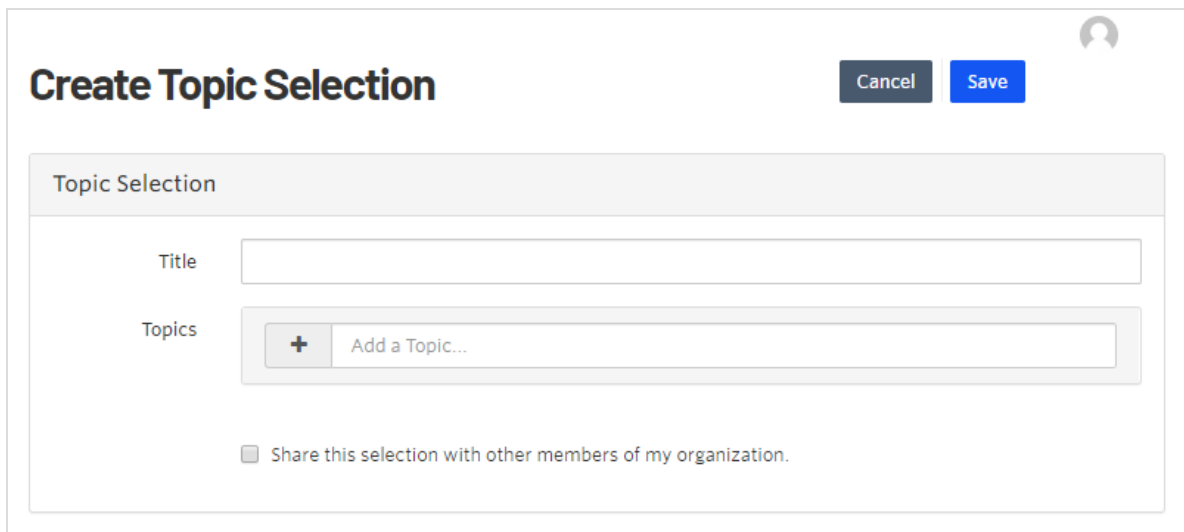


Topic selections

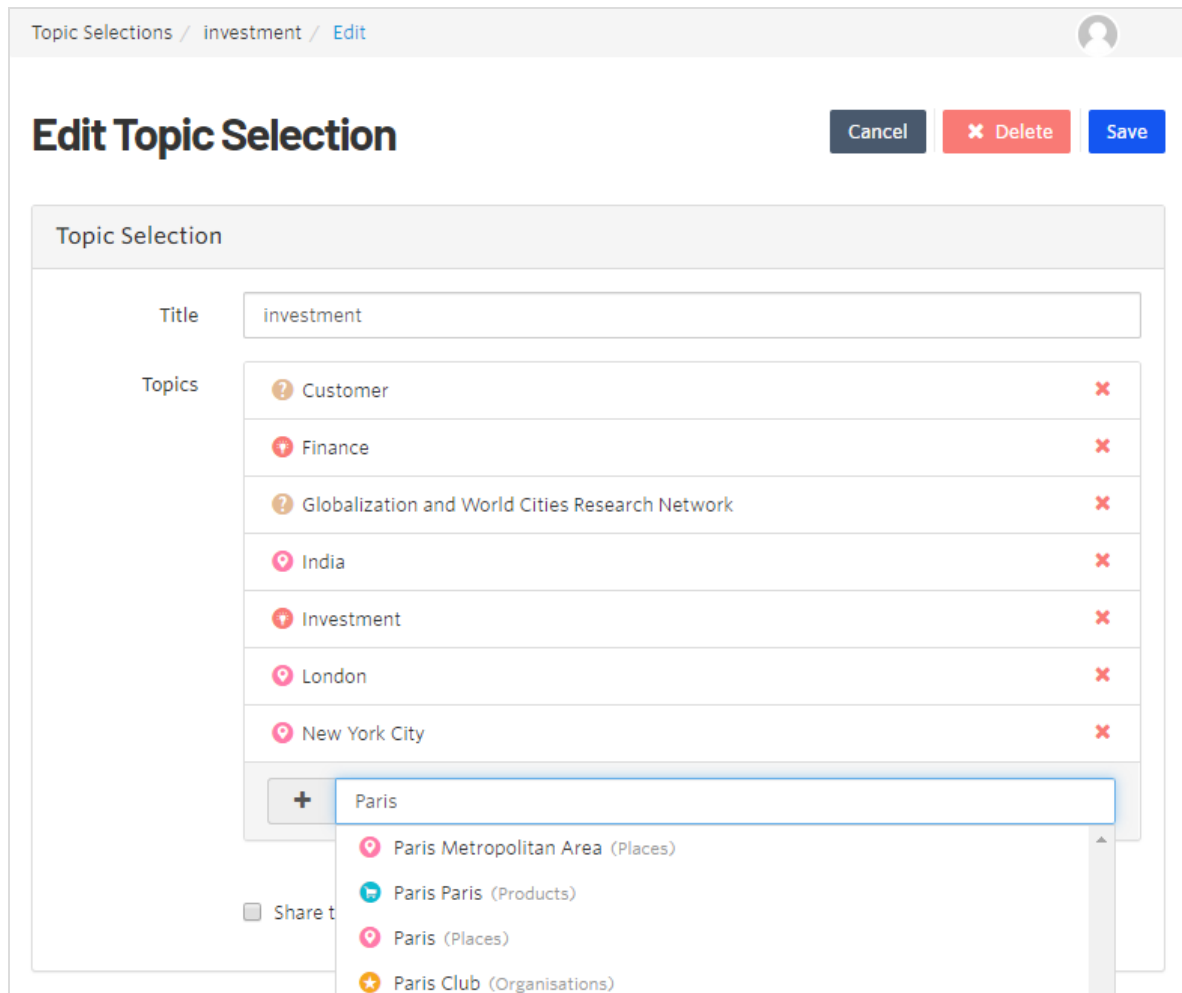
Displays private or shared selections.



To create a new topic selection, click **+ Create Topic Selection**, enter the selection title, and select the topics you want.



Click a topic to view it. You can add topics (as shown in the following image) and click **Save**.



Content Recommendations FAQ

How do I determine which specific assets to pull into the content pool from which recommendations are made?

Do not focus on analyzing data and insights around the buyer's journey on any given page because a buyer's journey is far from linear.

Work at ensuring that the content pools from which you are making recommendations represent a mix of varying journey stages, such as TOFU (top-of-funnel; awareness), MOFU (middle-of-funnel; consideration, target audience or lead), and BOFU (bottom-of-funnel; decision, ready-to-buy). Each stage is based on the context of the page or site section. The buyer is empowered to pick their own journey; and you are well-positioned to nudge the visitors down the funnel. You should recommend the content that best maps to the buyer's interests from each pool.

For example, you can insert a dynamic blade at the bottom of a page and a single recommendation on the right rail. On the bottom of the page, you make a recommendation from a content pool that is comprised purely of TOFU thought leadership content. On the right rail, however, you recommend MOFU content to nurture your audience and to provide opportunities to nudge visitors down the funnel.

How do I improve resource page recommendations to yield more form submissions?

If your pages have little text, you may be creating a light topic cloud for your assets, which means that personalized recommendations have to use fewer keywords. While those keywords might be appropriate, it might not be well-personalized. A light topic cloud may also mean light interest enrichment of the individual's interest profile after they consume that page. Try to enrich a page to improve your ability to map the best resource page to the visitor and ensure that the individual's interest profile accurately represents their interests.

With content changes, is SEO helped or hurt?

No impact on SEO. Using dynamic content to replace the static content located within the specific CSS selector with new, dynamically generated content variations is considered SEO-friendly. Google's ranking algorithms rely on the default, static version of a page - instead of on the potentially unlimited amount of personalized variations that a page can have.

Does adding the widget affect page load time?

No. Whenever you add third-party code on your site or web app, that is extra JavaScript that you are adding to whatever else you already have there. Optimizely's JavaScript runs asynchronously; it will not stall the rest of JavaScript already on the website. The load time of the widget is generally unnoticeable.

Can Content Recommendations make recommendations from a pool of gated content only?

Yes.

Can I add case studies, tools, webinars and events to Content Recommendations?

Yes. Case studies and webinars are already sectioned. Upcoming events require constant supervision in the instance, and date/time for events must be removed from the recommendation engine programmatically, so you should not add these to the recommendation engine.

Can I know whether a user used a paid search or organic search?

You can filter by channel in Adobe to get these insights.

Does Google know when AI is used on the site?

As a general rule, personalization does not work against you. By improving digital experiences, you can improve engagement metrics, increase loyalty, and build a stronger brand. From an SEO perspective, penalties occur when you deliberately attempt to manipulate organic rankings via optimization initiatives that target specific variations to search engine User-Agents (like Googlebot) and another to human visitors.

Googlebot is not targeted with one set of content while showing other content to users. Content Recommendations does not redirect or negatively impage page loading.

You should make sure that content that is important for SEO appears in the static source code and do not rely on the dynamically injected content. this way, most bots, including Googlebot, are exposed to the content that is important for your SEO strategy.

What content should be recommended right after set up?

Content Recommendations ingests every piece of content from across your digital properties. When ingesting content, two things happen:

1. Content Recommendations makes a copy of all the visual components of content, and available metadata in the page source code is also captured and stored (title, URL, Image, Publish Date, and so on).
2. Content Recommendations applies NLP to the content, which automatically reads and extracts many topics from every piece of content, assigning each piece of content its own weighted *topic cloud*. The objective of the machinelearning is to automatically create a uniform and consistent taxonomy across content that is granular enough to differentiate every piece of content's topical profile from one another.

User profiles are built simultaneously that may be stitched to certain client-persistent unique identifiers available in the browser. As users engage with content, the content's topic clouds get attributed to the user, creating individual interest profiles. With each subsequent engagement with content, that profile gets recalculated and updated in-session, factoring in topic-weighting in content, topic position, recency, and frequency of topic engagement.

When next-best-content recommendations are made, the AI identifies the content that best matches the user's individual interest profile. The recommendation decision is made from across "all content ingested" or narrowed down and defined (such as "blog content" or content containing a specific UT code).

Can Content Recommendations identify what keywords the user typed to Google Search?

Also, can it also identify what search terms they are using in the internal search box?

Content Recommendations does not identify keywords searched by the user. Content Recommendations only captures interactions with content pages and aggregates the topics associated with the first-party interactions in real time when creating the individual interest profile. To the extent that keywords typed into Google search or other search box exist as topics on pages identified by our NLP, they are automatically included in the user's individual interest profile.

Product Recommendations

Note: Product Recommendations is part of the [Optimizely Customer-Centric Digital Experience Platform](#). It requires a specific installation and license. The Optimizely Digital Experience Platform contains many features to support you in your daily work. Depending on how your solution is set up, some features described in this documentation may not be available to you. Contact your system administrator to find out more. See [Optimizely World](#) for technical information.

Optimizely Product Recommendations lets you provide a personalized shopping experience for visitors to your e-commerce website.

The screenshot displays the product page for 'Le Donne Leather Top Zip Hobo' on the Mosey website. The page includes a navigation bar with categories like 'Mens', 'Women', 'Homeware', and 'Inspiration'. The product details section shows the product name, SKU (SKU-13246883), price (\$63.50), and a 'Quick Overview' of the product's features. Below the product details, there are two recommendation sections: 'Related Products' and 'Recommendations for you'. The 'Related Products' section features four items: 'Bamboo 54 Hobo Embroidered Sack' (\$26.50), 'Canvas Printed Weekender Duffel Handbag' (\$18.50), 'Eastport Comics Backpack' (\$14.00), and 'Double Front Zipper Tote Handbag' (\$18.50). The 'Recommendations for you' section features four items: 'Puma v5.10 IT Mens Size 11.5 Yellow Sneaker...' (discounted from \$18.50 to \$14.80), 'Workwear Shirt Jacket' (\$8.50), 'Womens Beston Sweet' (\$31.50), and 'V-Neck Tee' (\$4.50).

Personalization is based on website interaction such as order history, visitor profiles, and intelligent algorithms to suggest products of interest. A developer must first configure the tracking, personalization service, and recommendation widgets, then you can start working with Product Recommendations to define recommendations strategies using the for the Personalization Portal. See the [Optimizely Personalization developer guides](#).

How it works

Recommendation widgets are components used for presenting product recommendations in pages. Optimizely configures widgets according to an agreed-upon strategy. Each widget can have its own strategy that depends on the identified KPIs for personalization. If there are more than one widget served on the same page, each widget can have a different strategy.

A strategy comprises a number of algorithms, developed by Optimizely's data scientists and machine-learning experts. The algorithms are applied to each widget in a stack formation. This means that the personalization engine examines the visitor's behavior, and returns a product recommendation that matches the first algorithm in the stack. If the system is unable to identify a suitable product, the next algorithm in the stack is used, and so on, until the required number of products for this widget are returned.

Rules in default configurations are simple by design:

- Recommend products from the same category on category pages viewed.
- Alternatives widget on a product display page (PDP) recommends products from the same category.
- Cross-sell widget on a PDP recommends products from a different category.

The following default rules apply for specific pages:

- **Home page.** Returning users are recommended products that are based on previous behavior. New users are recommended general popular products (because there is no user data yet).
- **Search page.** Products that are similar to the search term are recommended. For example, when a user enters a failed search term but then goes onto purchase a recommended product, this creates a relationship between the failed search term and the product. If no products are similar to the search term, products that are relevant to the user (based on user data) are recommended.
- **Category page.** Popular products are recommended that are related to the individual user from the category they are viewing. If no products are related, best-sellers from the category being viewed are recommended.

- **PDP.**
 - **Alternatives widget.** Alternative products are recommended (from the same category) based on crowd viewing and purchasing behavior. For example, product A is often viewed with product B.
 - **Cross-sell widget.** Cross-sell products are recommended (from a different category) based mainly on crowd purchasing behavior. For example, products A is typically purchased with product B.
- **Basket page.** Complementary products are recommended based on the products in the user's basket, based mainly on crowd purchasing behavior. Functions in a similar way to the PDP cross-sell widget.

You can access Product Recommendations from the Optimizely for the Personalization Portal.

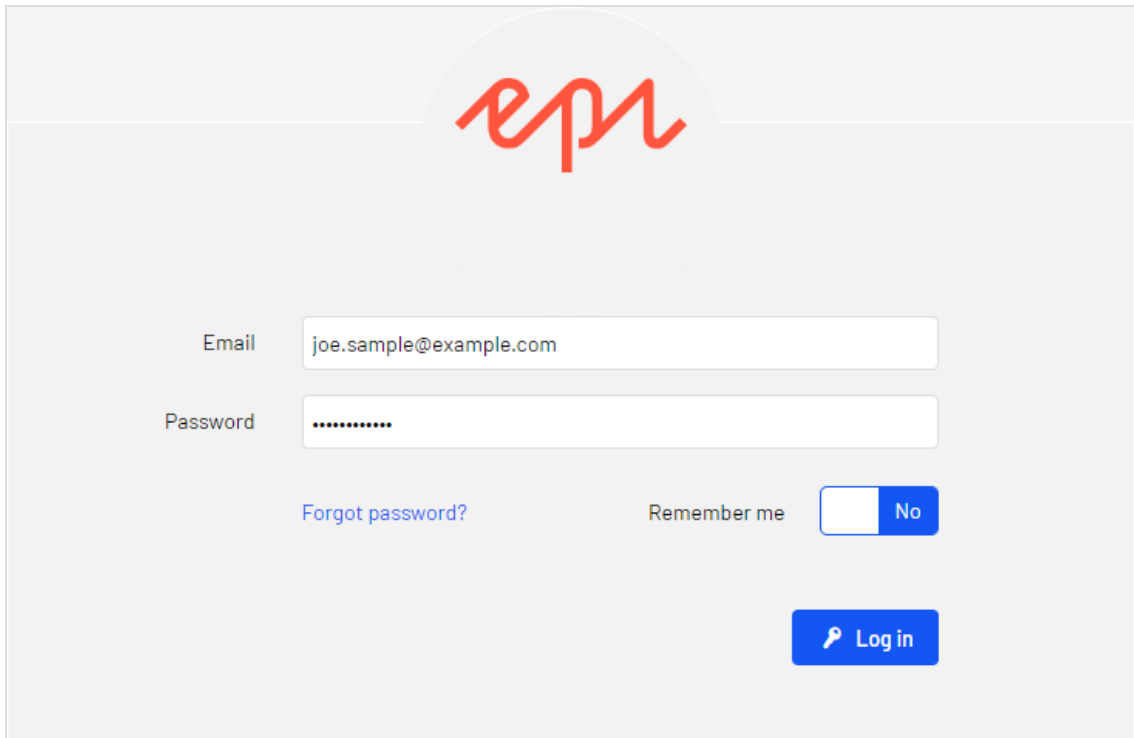
1. After Optimizely Support creates your user account, you receive access to the Optimizely for the Personalization Portal at one of the following URLs:
 - <https://smartmanager.peerius.com/admin>
 - <https://smartmanager.peerius.episerver.net/admin>

The following user roles apply:

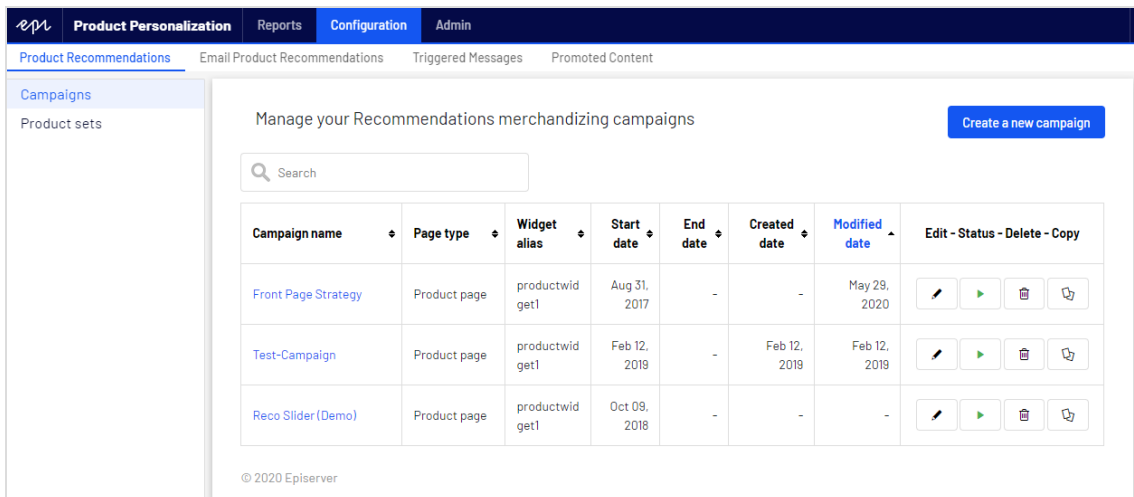
- **Editor.** Can view, create, and edit a campaign and send it to reviewers for approval. An editor cannot approve or make a campaign "go live".
- **Reviewer.** Can view, create, edit, review change requests, approve or reject changes, and make a campaign "go live".

Tip: Optimizely manages the reviewer and editor roles for you. To set up or modify these roles, contact customer support.

2. Log in to the Optimizely for the Personalization Portal with your provided credentials. If you do not have your login details, contact developers@optimizely.com



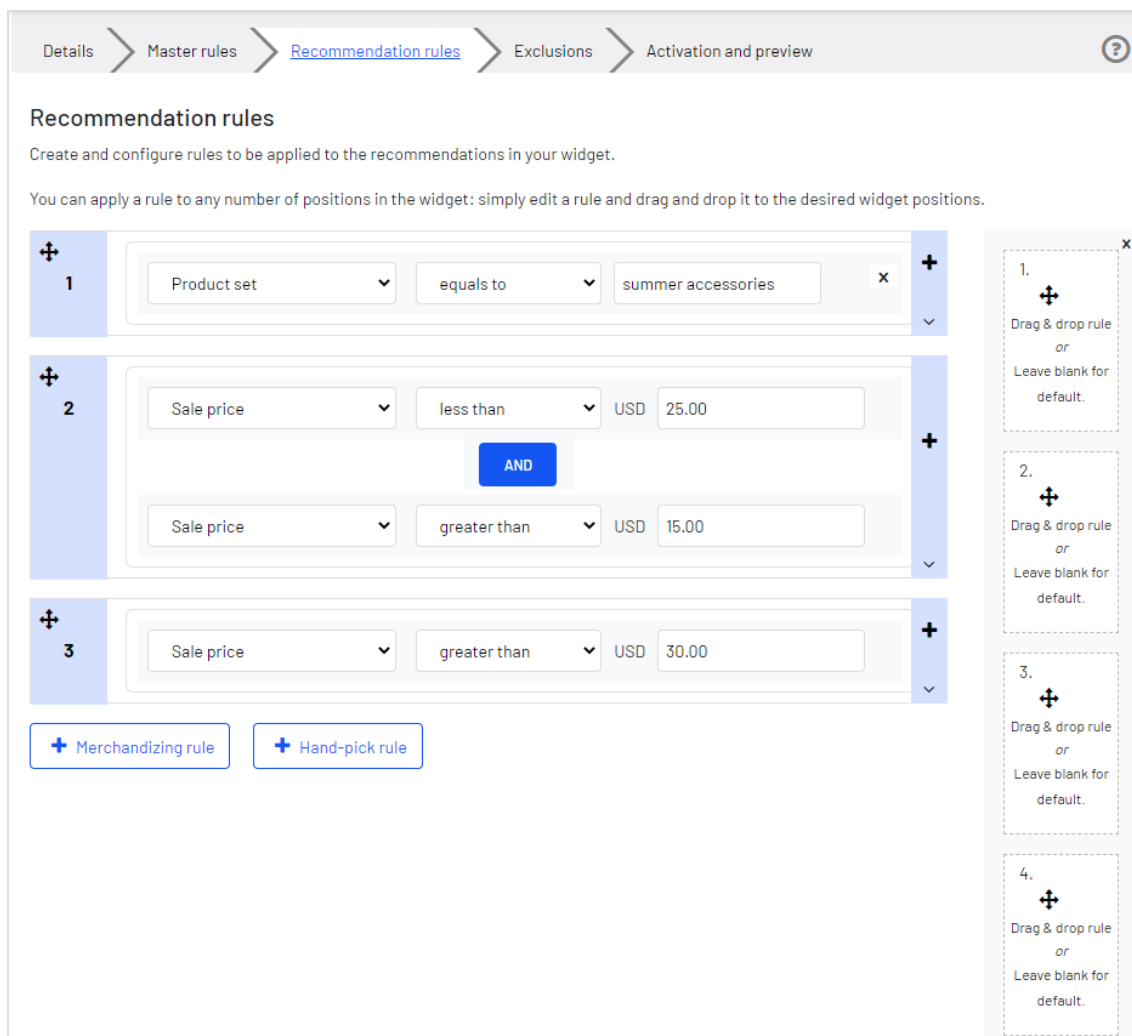
3. Select the **Product Recommendations** tab in the navigation bar. In the Product Recommendations view, you can create new merchandizing campaigns, and view or edit the campaigns that you have already set up.



- 4. Click **Create a new campaign** to set up a new campaign. See [Setting up a Product Recommendations campaign](#). To edit an existing campaign, click the campaign name or the **Edit** icon.

You can refine the product recommendations generated by Optimizely algorithms, or override product recommendations to execute specific merchandising campaigns using your overall site strategies and targets.

You can control merchandizing rules in the Optimizely for the Personalization Portal, switching them on or off, and changing them in real-time.



Setting up a Product Recommendations campaign

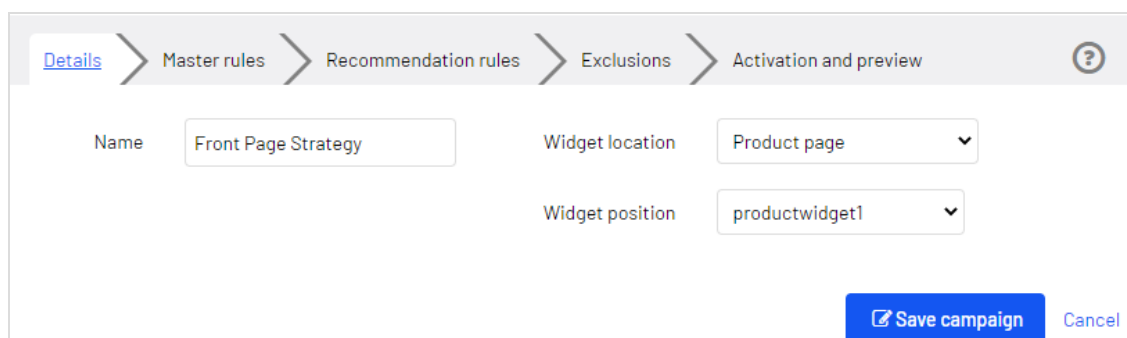
To create a new Product Recommendations campaign, click **Create a new campaign** from the **Recommendations** overview screen, or select the **Recommendations > New campaign** tab. The campaign editing screen appears. The set-up process involves the following steps:

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

Configuring main Product Recommendations campaign details

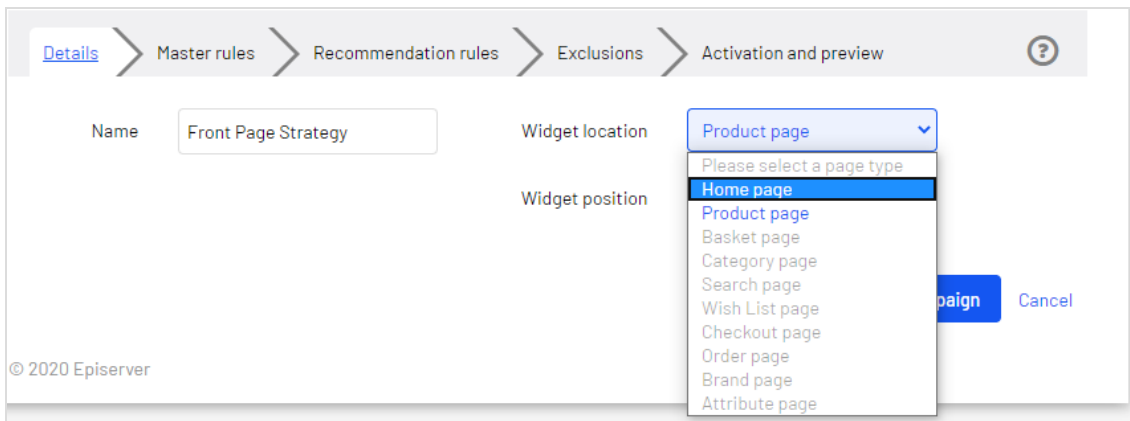
In the **Details** tab, configure the main details of the Product Recommendations campaign: **name**, **location** and **position** of the widget to which the Product Recommendations campaign is applied.

1. Enter a name for the campaign you are creating, such as *Front Page Strategy* or *Brand Rule*.

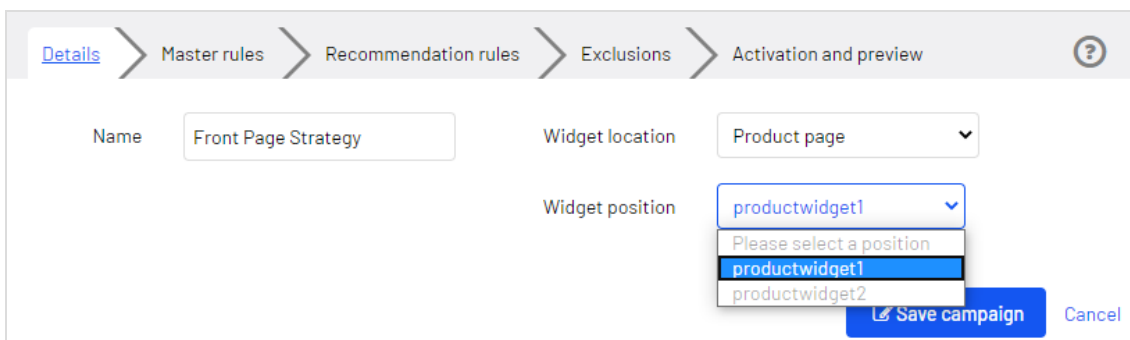


The screenshot shows a navigation bar with five tabs: **Details** (selected), **Master rules**, **Recommendation rules**, **Exclusions**, and **Activation and preview**. A help icon (?) is visible on the right. Below the navigation bar, the 'Name' field contains 'Front Page Strategy'. The 'Widget location' dropdown menu is set to 'Product page'. The 'Widget position' dropdown menu is set to 'productwidget1'. At the bottom right, there is a blue 'Save campaign' button with a checkmark icon and a 'Cancel' link.

2. Select the widget location; this is the page type where the target widget of the Product Recommendations 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 Product Recommendations master rules

Tip: Setting up **Master rules** is optional.

Master rules let you refine the **Product Recommendations** 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 product recommendation rules.

A master rule lets you define where the rule will work. For example:

- If you setup a master rule that states *r.category="category A"*, the campaign operates only on category A; other categories will not apply the campaign.
- If you do not define a master rule (a master rule is not required) then the campaign applies to every instance of that widget. For example, if you setup a campaign on the category widget, the campaign applies to every category page, such as category A, B, C, ... Z.

For example, you may have one product recommendation rule that recommends *products that are over \$50*, and another rule that recommends *products only from Brand X*. You can set a Master rule that lets only products that have *at least 10 items in stock* be displayed (for either the over \$50 rule, or the Brand X rule).

Examples of **Master rules** frequently used:

Use case	Master 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.
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.
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).
Do not recommend discounted products when a user is viewing a full priced product.	Discount equals to False.

1. To add a Master rule, select the product attribute for your products from the drop-down list. The attributes are based on the product feed, plus a few attributes that Optimizely 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**.

- 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. Click a value to select it. Numeric values (such as prices) do not have a pre-populated list; enter the value manually.

Configure your campaign Front Page Strategy 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

Sale price greater than or equals GBP 10.00 - +

AND

Brand equals to bamboo 54 - + Add group

Save campaign Cancel

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.

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

Defining product 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 Optimizely algorithms.

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

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.

1 Product set equals to summer accessories

2 Sale price less than USD 25.00 AND Sale price greater than USD 15.00

3 Sale price greater than USD 30.00

[+ Merchandizing rule](#) [+ Hand-pick rule](#)

1. Drag & drop rule or Leave blank for default.

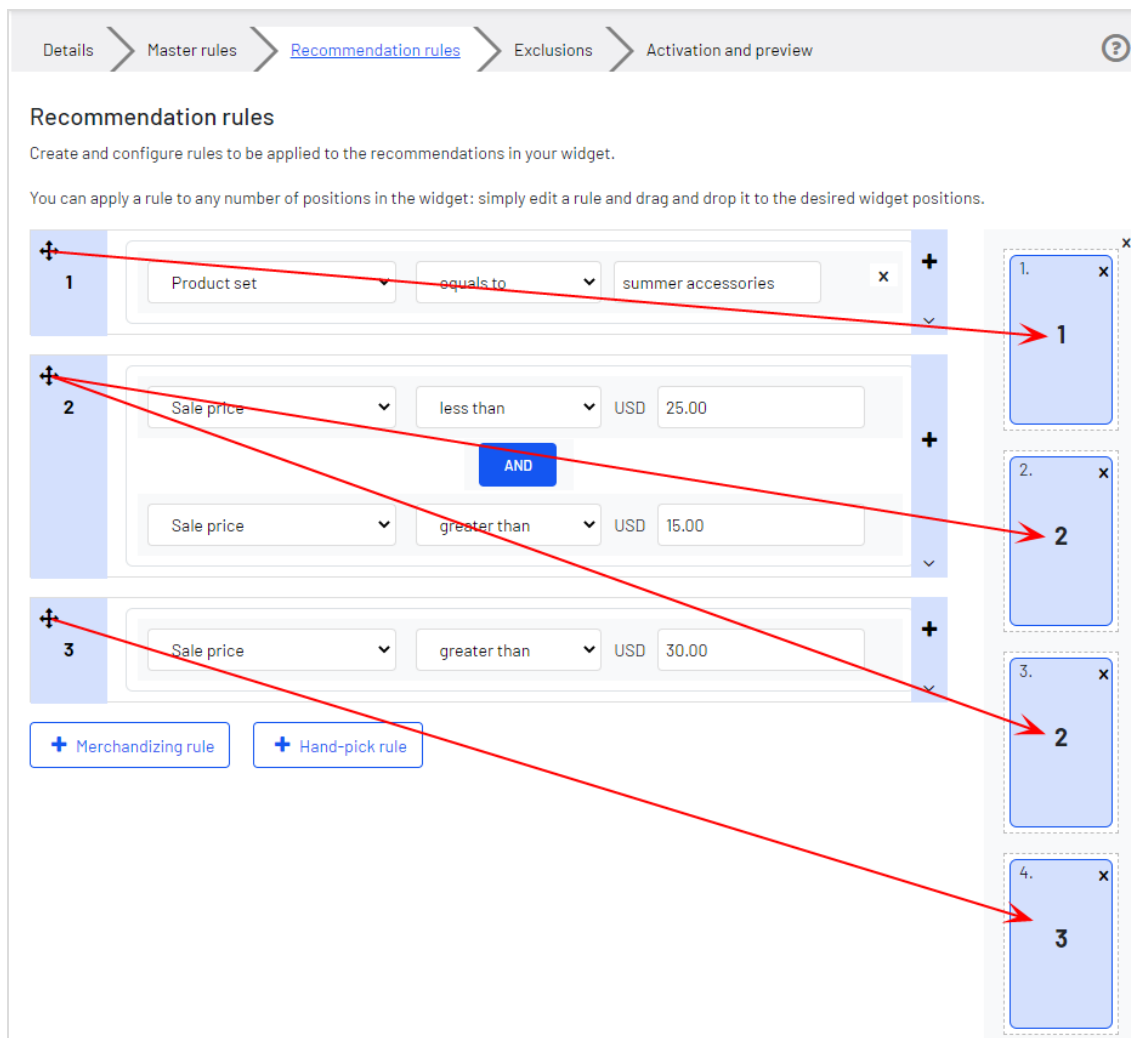
2. Drag & drop rule or Leave blank for default.

3. Drag & drop rule or Leave blank for default.

4. Drag & drop rule or Leave blank for default.

- Click **Merchandizing rule** to add another recommendation rule for a broader range of products, such as *any product with more than 10 units available*. Only products that match the recommendation rule and the Optimizely algorithms are displayed.
- Click **Hand-pick rule** to create a rule that overrides the recommendation rule when a specific product is viewed. The product recommendations are displayed regardless of the recommendation rule and the Optimizely algorithms.
- Use the drop-down fields to add the required criteria for the product recommendations in the same way as you would for a [Master rule](#).

- You can add more than one criterion in the same rule by using +, and the **AND** and **OR** operators.
- 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. The following image shows rule 1 applied to product position 1, and rule 2 applied to product position 2 and 3 and rule 3 applied to position 4. You can apply the same rule to more than one product position. If you want the same rule to apply to all products in a widget, click **Apply to all**.



- You can add more than one rule to the same Product Recommendations 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 sale price of **25.00** or more, the second product between **15.00** and **24.99**, and the third product under **15.00**. To add another rule, click **+**.

The screenshot displays the 'Recommendation rules' configuration page. At the top, there is a breadcrumb navigation: Details > Master rules > Recommendation rules > Exclusions > Activation and preview. Below the breadcrumb, the title 'Recommendation rules' is followed by the instruction: 'Create and configure rules to be applied to the recommendations in your widget.' A sub-instruction states: '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.'

Three rule configurations are shown:

- Rule 1:** 'Sale price' > 'greater than' > 'USD 25.00'. A red circle highlights a '+' button on the right side of the rule.
- Rule 2:** 'Sale price' > 'less than' > 'USD 25.00' AND 'Sale price' > 'greater than' > 'USD 15.00'. A blue 'AND' button is positioned between the two conditions.
- Rule 3:** 'Sale price' > 'less than' > 'USD 15.00'.

At the bottom left, there are two buttons: '+ Merchandizing rule' and '+ Hand-pick rule'. On the right side, a preview area shows three widget slots. Slot 1 contains rule 1, slot 2 contains rule 2, and slot 3 contains rule 2. Each slot has a small 'x' icon in the top right corner.

- Click the currency code to select another currency code from the resulting menu.

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

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.

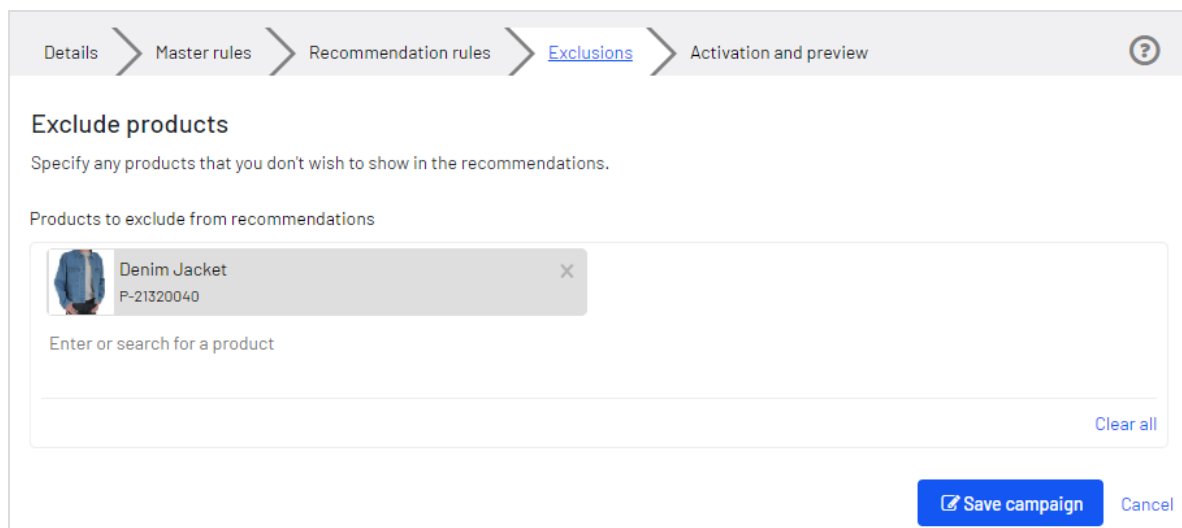
- Click **Toggle Advanced** if you want to manually enter the coding.

Applying exclusions

Tip: Exclusions are optional.

Exclusions let you specify products that you do not want to show in the widget (specified in the Product Recommendations campaign in the **Details** tab). For example, you set up a product 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 the products in the results to add them to the exclusions list, and click **Finished** after you have added your exclusions.



The screenshot shows the 'Exclude products' step in a multi-step process. The breadcrumb navigation at the top includes 'Details', 'Master rules', 'Recommendation rules', 'Exclusions' (the current step), and 'Activation and preview'. The main heading is 'Exclude products' with a sub-instruction: 'Specify any products that you don't wish to show in the recommendations.' Below this, there is a section titled 'Products to exclude from recommendations' containing a list of one item: 'Denim Jacket' with SKU 'P-21320040'. A search input field with the placeholder 'Enter or search for a product' is located below the list. At the bottom right of the interface are two buttons: 'Save campaign' and 'Cancel'.

Activating and previewing product recommendations

In the **Activation and Preview** tab, specify a start and end date for your Product Recommendations campaign, select days of the week to run the campaign, and

preview the campaign using a product or category.

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

Date and time **Advanced options**

Specify when this campaign will run. Select all Clear selected

Start Jun 05, 2020 00:00 Monday Tuesday Wednesday Thursday

End Friday Saturday Sunday

Time zone Europe/London

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

Enter or search for a product

Category viewed

Search for a category

Locale en

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.

Product Personalization | Reports | Configuration | Admin

Product Recommendations | Email Product Recommendations | Triggered Messages | Promoted Content

Campaigns | Product sets

Manage your Recommendations merchandizing campaigns [Create a new campaign](#)

Search

Campaign name	Page type	Widget alias	Start date	End date	Created date	Modified date	Edit - Status - Delete - Copy
Front Page Strategy	Product page	productwidget1	Aug 31, 2017	-	-	May 29, 2020	Activate It!
Test-Campaign	Product page	productwidget1	Feb 12, 2019	-	Feb 12, 2019	Feb 12, 2019	
Reco Slider (Demo)	Product page	productwidget1	Oct 09, 2018	-	-	-	

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Approving campaign changes

When a campaign editor creates or changes a campaign and clicks **Send to review**, the campaign appears in the **Campaign reviews** view on the **Configuration** tab. A reviewer can approve changes to a campaign and apply the campaign to "go live" on the site. A reviewer can also make changes to a campaign without going through an approval process.

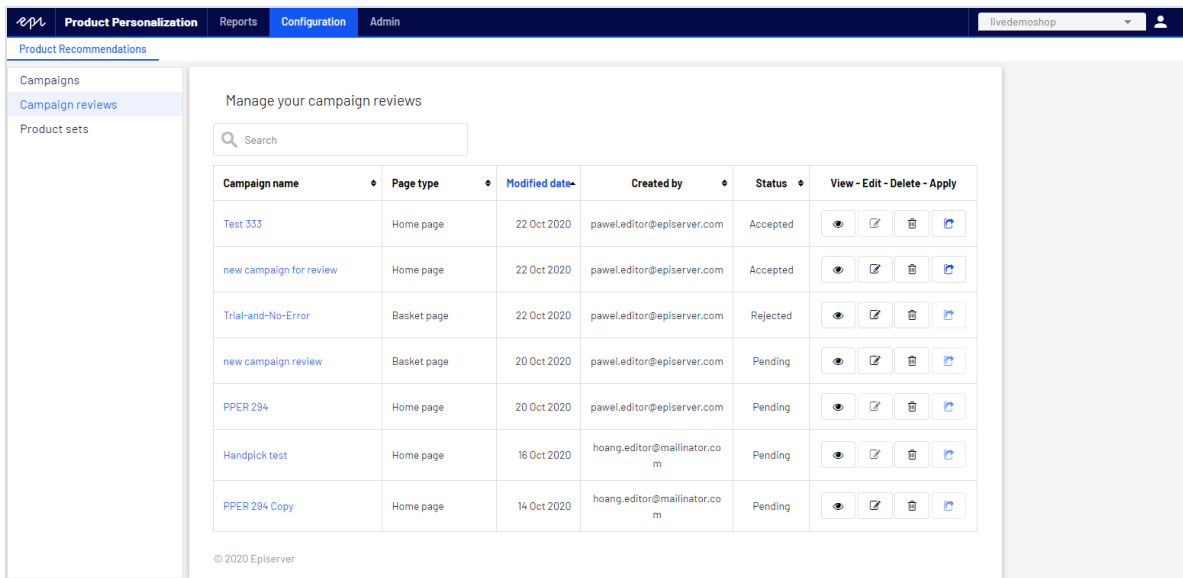
A reviewer can perform the following functions for a campaign:

- **View.** View the campaign details. Reviewers can toggle between the original and changed campaign to review the changes.

Tip: To view the campaign, click the campaign name link or the corresponding view icon.

- **Edit.**
 - Editors can modify a campaign, even if it is in review status; click **Update review**.
 - Reviewers can edit an original campaign, but cannot edit the version in review; click **Accept**, **Reject**, or **Delete**.

- **Accept or Reject.** Reviewers can approve or reject changes that editors make to campaigns.
- **Delete.** Reviewers can delete a campaign review from the **Campaign reviews** list; the original campaign remains in the campaign list.
- **Apply.** Enabled after changes to a campaign are accepted, reviewers can click **Apply** to make the modified campaign "go live" on the site.
- Sort column data by clicking on the column heading.
- Search for a campaign.



To review changes to a campaign, select a campaign from the **Campaign reviews** list. The **Configure your campaign** view appears with a **Show review version/Show original version** toggle button.

- Click **Show review version/Show original version** to review changes to the campaign in each step (**Details, Master rules, Recommendation rules, Exclusions, Activation**). The original version has a gray background and the review version has a white background, similar to the following images that show changes to the **Recommendation rules** view.

Configure your campaign ANA-576_test Show review version

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

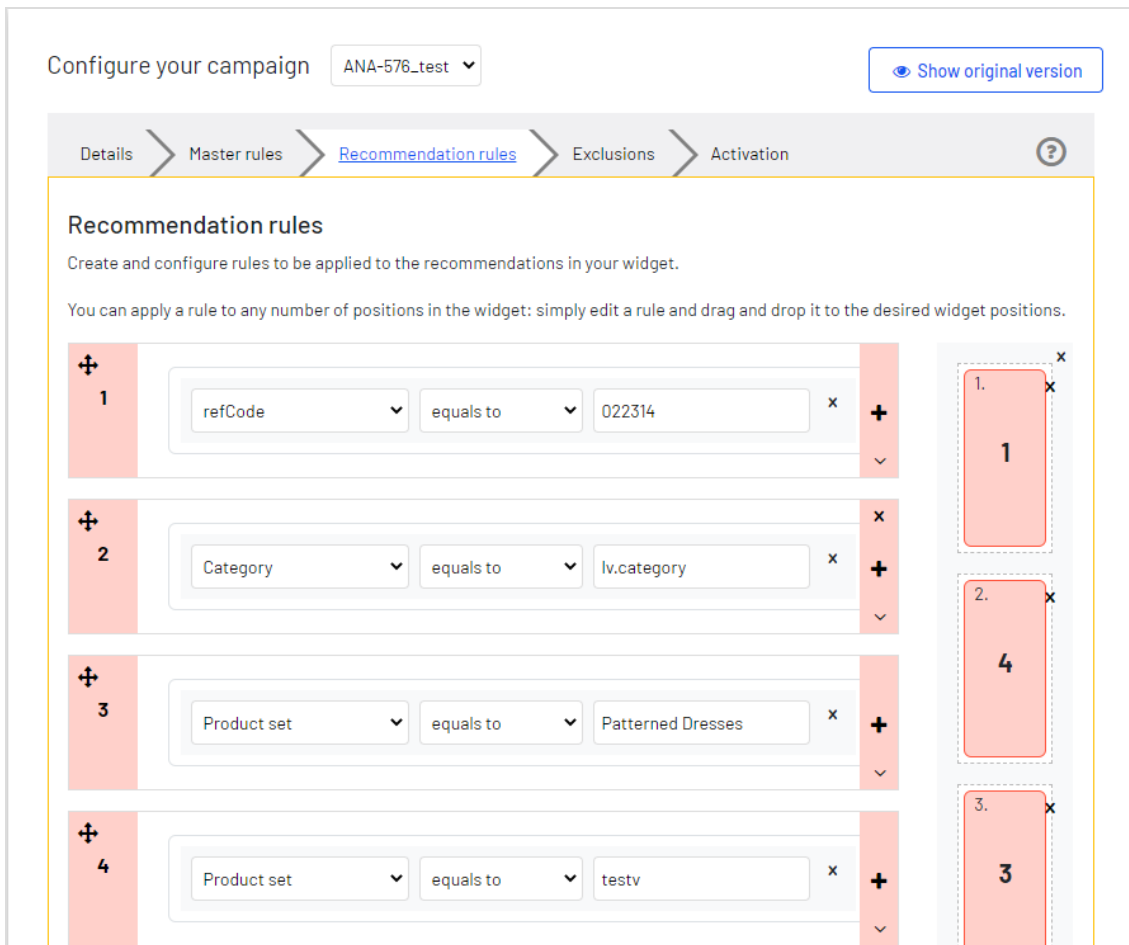
Recommendation rules

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.

+	1	refCode	equals to	test123_reviewChangeTEs	x	+	1
+	2	Product set	equals to	ellie test	x	+	2
+	3	Product set	equals to	Patterned Dresses	x	+	3
+	4	Product set	equals to	testv	x	+	3

2.
 +
 Drag & drop rule
 or
 Leave blank for default.



- If there are no changes to the fields on a step (**Details, Master rules, Recommendation rules, Exclusions, Activation**), clicking the toggle button shows only a background color change.
- If you are reviewing a new campaign and click **Show original version**, a message appears: *Old data is not available. This review is for creating a new campaign.*
- If you are reviewing a campaign that is to be deleted and click **Show review version**, a message appears for the changed version: *Data is not available. This review is for deleting a campaign.*

After you review the changes to a campaign, you can click one of the following actions.

Tip: When you select one of these options, a box appears where you can enter optional comments.

- **Accept. Apply** is enabled so that you can start the updated campaign immediately. If you do not click **Apply**, the campaign remains in the **Campaign reviews** list showing an **Accepted** status.
- **Reject. Apply** is disabled and the original campaign remains unchanged.
- **Delete.** The review version is deleted from the **Campaign reviews** list and the original campaign remains unchanged.

Each result triggers an email to the person who changed the campaign, with the decision of the reviewer.

The screenshot shows the Episerver Product Personalization interface. The top navigation bar includes 'Product Personalization', 'Reports', 'Configuration', and 'Admin'. The current page is 'Product Recommendations', with a sidebar menu showing 'Campaigns', 'Campaign review...', and 'Product sets'. The main content area is titled 'Configure your campaign' and shows a dropdown menu for 'new campaign review' and a 'Show original version' button. Below this is a breadcrumb trail: 'Details > Master rules > Recommendation rules > Exclusions > Activation'. The form fields include 'Name' (new campaign review), 'Widget location' (Basket page), and 'Widget position' (basket). There is a 'Comments' section with a 'New comment' text area and an 'Add comment' button. At the bottom, there are buttons for 'Show original version', 'Accept', 'Reject', 'Delete', 'Apply', and 'Cancel'. The footer shows '© 2020 Episerver'.

Product recommendation reports

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

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

Product Recommendations 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 product recommendations
- Best Performing pages
- Best Performing Widgets

Attribution Model

The Product Recommendations attribution model is the industry standard. If a visitor visits your site and clicks on a product 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 Product Recommendations.

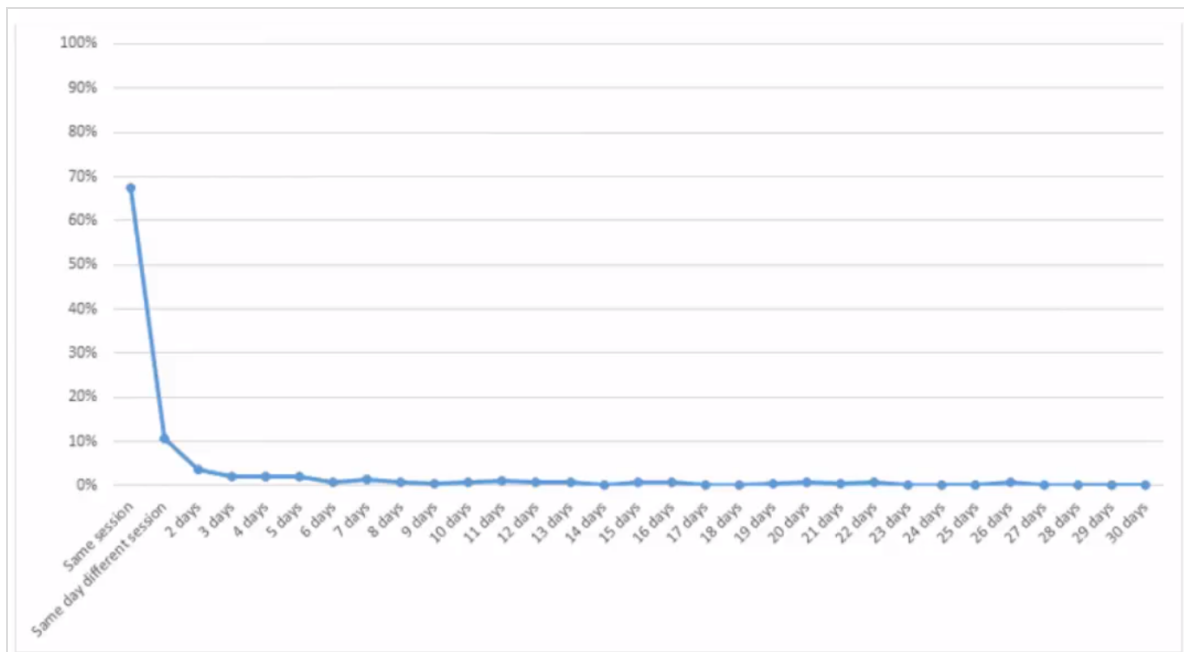
Example

If a visitor engages with a product recommendation, returns to the site and purchases the item, plus other items they were not recommended, Product Recommendations are only attributed the revenue generated from the recommended item and that they engaged with (clicked on) - *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 Product Recommendations 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 is attributed to Product Recommendations. Equally, if it was just one item, the sole value of that one item is attributed to Product Recommendations.

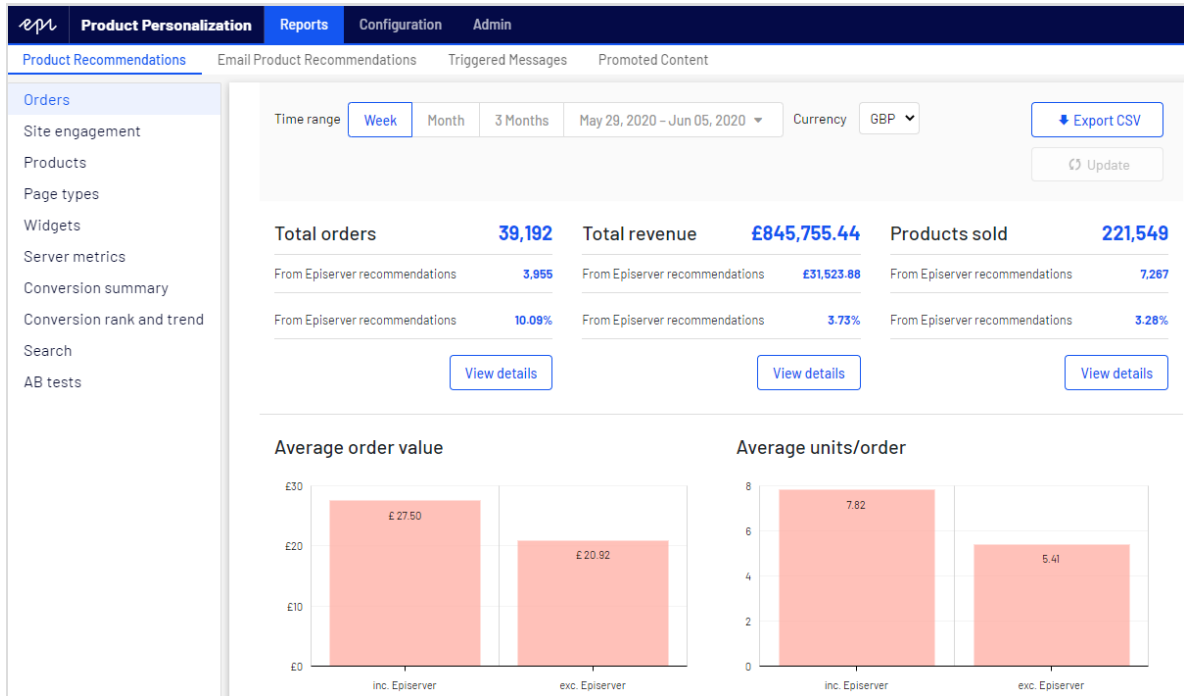
Product Recommendations can produce a graph that plots attribution against time. This shows when most people convert after being shown a product recommendation. The metrics used are CPC (click to purchase conversion) against time. On average, 85% of conversions occur within 24 hours.



Orders tab

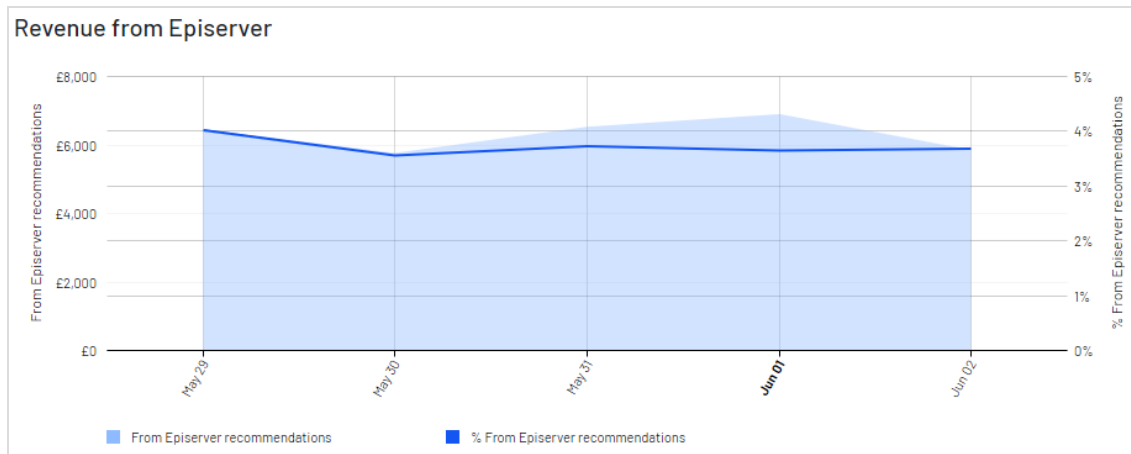
The **Orders** tab shows orders from online channels tracked by Optimizely Personalization.

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



- **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.
 - **Optimizely Recommendations.** The number of orders in which an Optimizely product recommendation was purchased.
 - **Average percentage from Optimizely recommendations.** The percentage of orders in which an Optimizely product recommendation was purchased.
- **Total revenue.**
 - **From Optimizely recommendations.** Shows the revenue generated from products bought through product recommendations, which is measured by totalling the unit value of products clicked and purchased via recommendations.

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



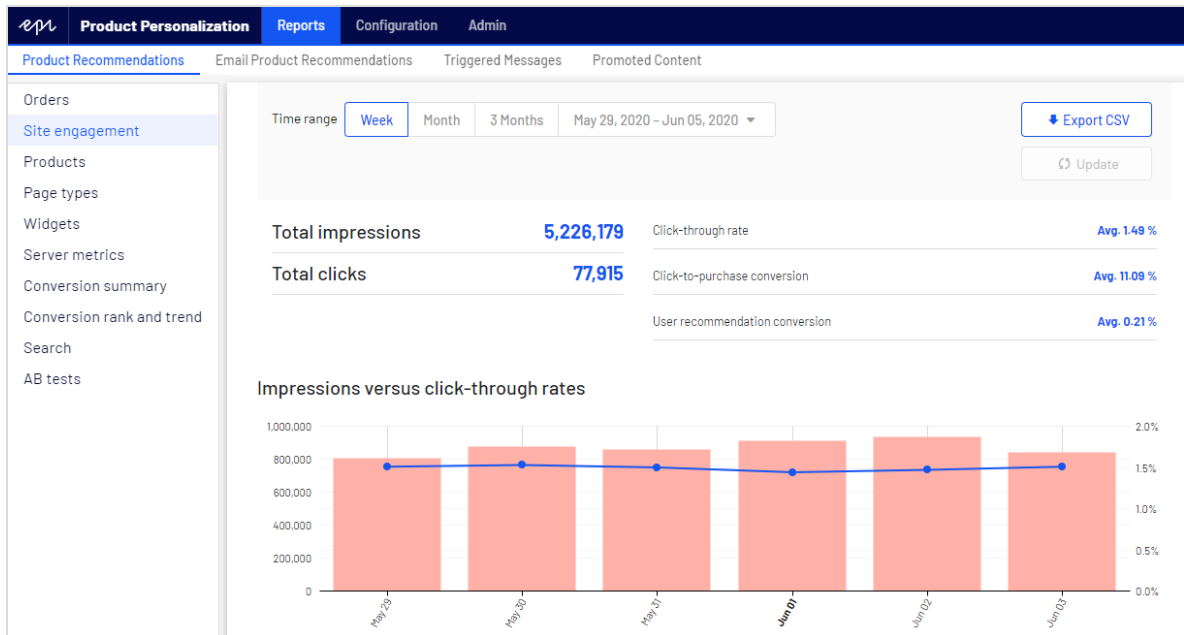
- **Orders data table.** Shows revenue and products shown in a table. You can organize orders, revenue, and products sold by the following columns.

Orders			
Revenue	Products sold		
Total orders 39,192	From Episerver recommendations 3,955	% From Episerver recommendations 10.09 %	
Date	Total	From Episerver recommendations	% From Episerver recommendations
May 29, 2020	7,420	800	10.78 %
May 30, 2020	7,486	733	9.79 %
May 31, 2020	8,260	856	10.36 %
Jun 01, 2020	8,809	858	9.74 %
Jun 02, 2020	7,217	708	9.81 %
Total	39,192	3,955	10.09 %

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

Site engagement tab

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



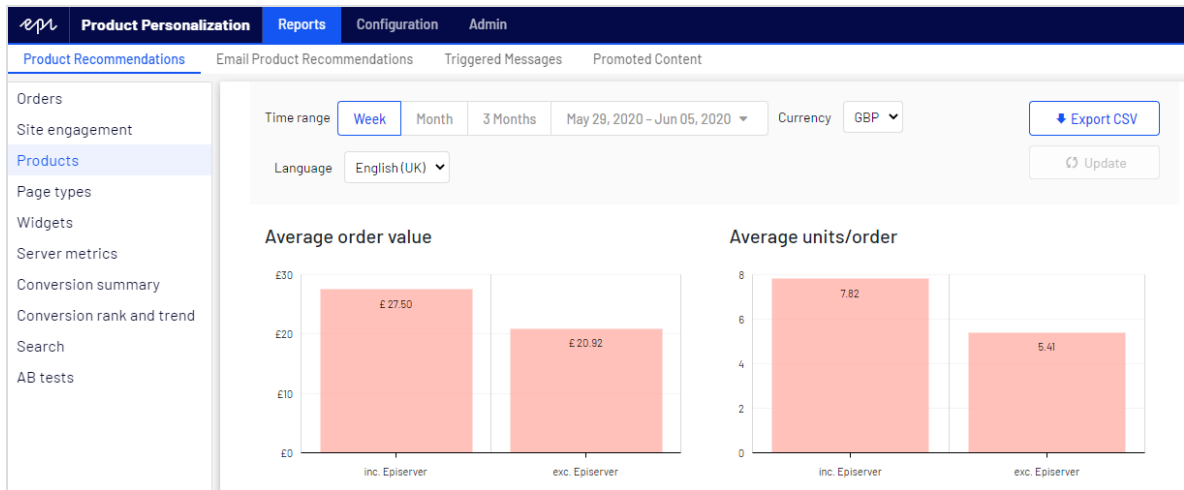
- **Total impressions.** Shows the total number of page impressions where product recommendations were served.
- **Total clicks.** Shows the total number of clicks that have occurred on product recommendations.
- **Click through rate.** Shows a percentage and is worked out on the sum of clicks divided 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 product recommendation, compared to the number of unique visitors who viewed a product 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 product recommendations, and the line shows the daily click through rate for product recommendations.
- **Site Engagement data table.** You can organize the data by the following columns.

Date ▼	Impressions ↕	Clicks ↕	CTR ↕	CTP ↕	URC ↕
May 29, 2020	804,136	12,124	1.51 %	11.45 %	0.21 %
May 30, 2020	877,334	13,393	1.53 %	11.11 %	0.22 %
May 31, 2020	858,335	12,875	1.5 %	10.4 %	0.21 %
Jun 01, 2020	909,440	13,057	1.44 %	11.5 %	0.23 %
Jun 02, 2020	936,594	13,795	1.47 %	11.69 %	0.22 %
Jun 03, 2020	840,340	12,671	1.51 %	10.38 %	0.2 %
Total	5,226,179	77,915	1.49%	Avg. 11.09%	0.21 %

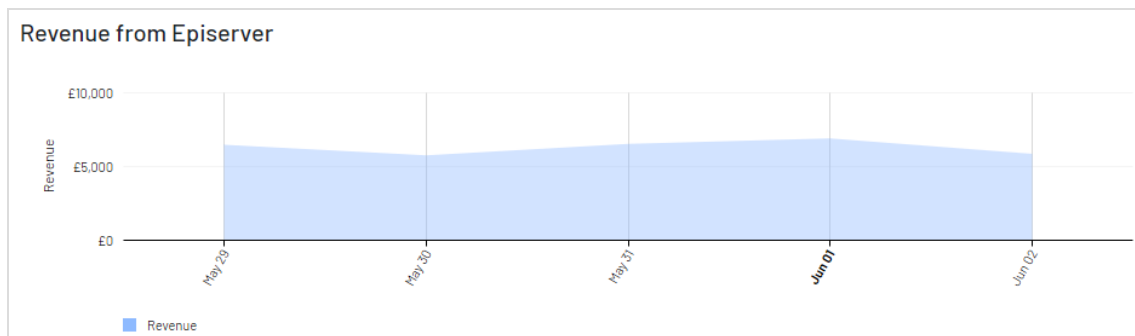
- Date
- Total number of impressions
- Total number of clicks
- Percentage of product recommendations that were clicked
- Percentage of purchased product recommendations after having been clicked on
- Percentage of unique visitors who purchased from product recommendations versus unique visitors who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

Products tab

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



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



- **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.

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
1	654050	Maybelline Age Rewind Eye Concealer Light 6.8ml, Nude	1,045	125	£5,439.58	£667.64
2	716130	Makeup Revolution Luxury Banana Powder	552	130	£2,505.64	£592.98
3	726250	Real Techniques Prep & Prime Set	1,755	73	£13,720.33	£570.93
4	591912	Aptamil 3 Growing Up Milk Powder 900g	701	58	£6,280.64	£521.42
5	725870	Skinny Tan & Tone Oil	542	30	£8,204.86	£454.92
6	215469	Oral B Precision Clean Replacement Toothbrush Heads x4	1,764	49	£14,063.83	£390.46
7	410901	Ghost The Fragrance 150ml Eau de Toilette Spray	230	16	£5,085.94	£354.16
8	439400	Collection Lasting Perfection Concealer Fair 1, Nude	595	86	£2,403.78	£346.32
9	716342	I Heart Makeup Unicorn Heart Rainbow Highlighter, Multi	690	67	£3,343.29	£329.19
10	717535	Skinny Tan Dual Sided Mitt	482	72	£2,086.31	£308.28
	Totals		8,356	706	£63,134.20	£4,536.30

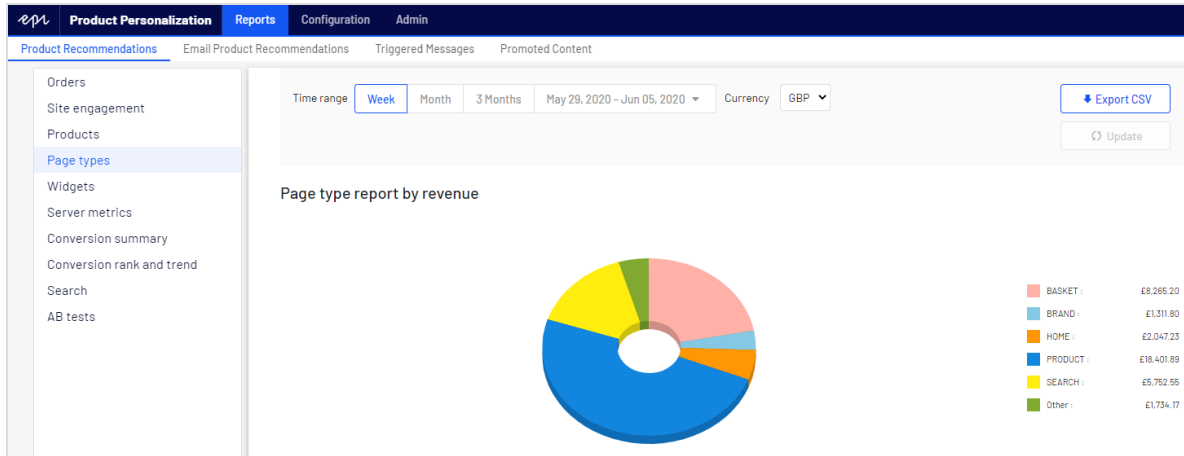
Page 1 of 1142 - total 11411 entries

- Product code used to identify the product
- Title of the product
- Total number of units sold on the site
- Number of units purchased through product recommendations
- Total revenue of the product on the site
- Total revenue of the product through product recommendations
- Number of impressions
- Click-through rate (CTR).
- Click to purchase (CTP).

Page Types tab

The **Page Types** tab shows page types on the site where product recommendations are served, and how much Product Recommendations revenue is

generated from each page.



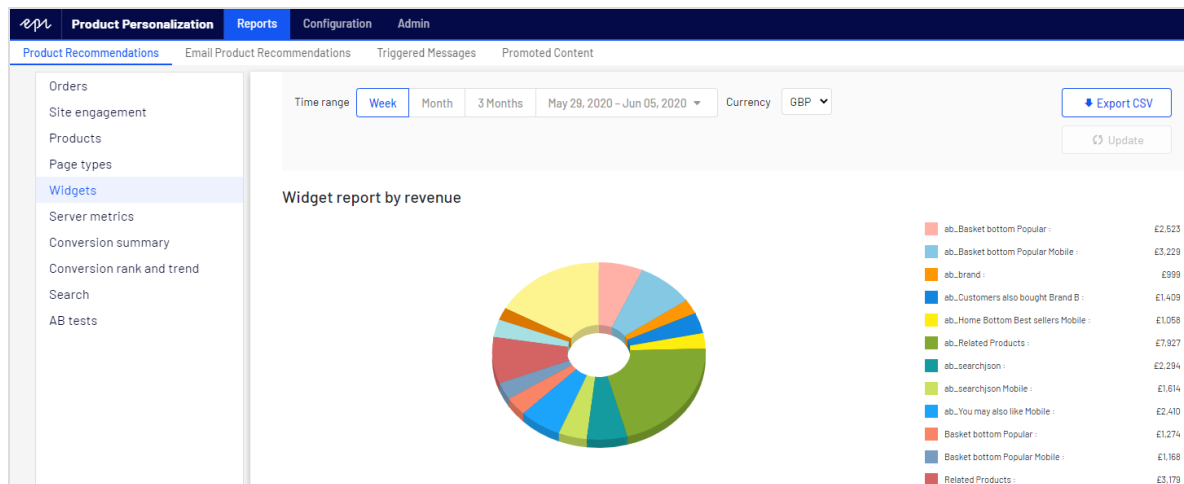
- **Page type report by revenue.** A pie chart shows which page types are generating the most Product Recommendations revenue.
- **Page Type data table.** You can organize the data by the following columns.

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
Favourites	0	0	0.00%	1	0.00%	£3.49
Wish List	7,976	105	1.32%	8	7.62%	£41.73
My Account B	0	0	0.00%	20	0.00%	£97.50
My Account	0	0	0.00%	80	0.00%	£409.76
Category	957,380	1,076	0.11%	133	12.36%	£515.85
Order Confirmation	39,593	803	2.03%	202	25.16%	£665.84
Home	763,631	5,174	0.68%	344	6.85%	£2,047.23
Brand	42,834	752	1.76%	358	47.61%	£1,311.80
search	710,936	7,421	1.04%	1,237	16.67%	£5,752.55
Basket	659,889	9,253	1.40%	2,314	25.01%	£8,265.20
Product	1,776,982	48,996	2.76%	3,954	8.07%	£18,401.89
Totals	4,959,221	73,580	1.48	8,651	11.76	£37,512.84

- Page type names where product recommendations are present
- Number of impressions for that page type
- Number of clicks on product recommendations for that page type
- Click-through rate (CTR) for product 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 product recommendations on that page type
- Click to Purchase (CTP) rate for product recommendations shows a percentage, calculated by sum of purchased recommended products divided by sum of clicks
- Revenue generated from product 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.
- **Widget data table.** Shows similar information as Page Types, except based at the widget level. Click 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
favorite	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

- o Widget
- o Impressions
- o Position
- o Clicks
- o Click-through rate (CTR)
- o Items bought
- o Click to purchase (CTP)
- o Revenue

Server Metrics tab

The **Server Metrics** tab shows two graphs:

- Number of product recommendations served per day



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



Conversion summary tab

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

The screenshot shows the 'Product Personalization' interface with the 'Reports' tab selected. The 'Conversion summary' view is active, displaying a table of products categorized as 'High converting, high traffic'. The table includes columns for Product ref., Title, Page views, Units bought, Conversion %, Revenue per page view, and Revenue. The data is for the week of May 29, 2020, to Jun 05, 2020, in GBP currency.

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

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.

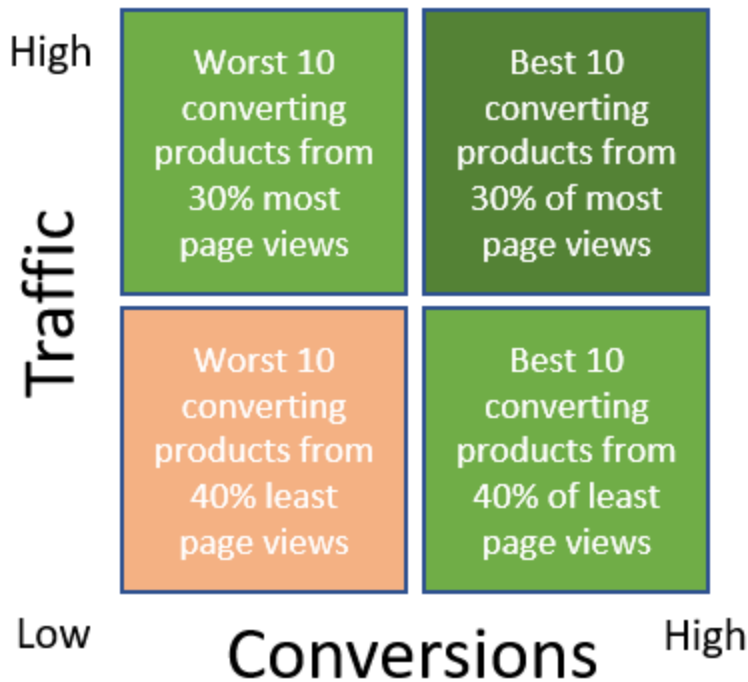
Traffic definitions

- **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 shows the various combination views of conversion data, which are displayed in the tabs on the **Conversion summary** view.

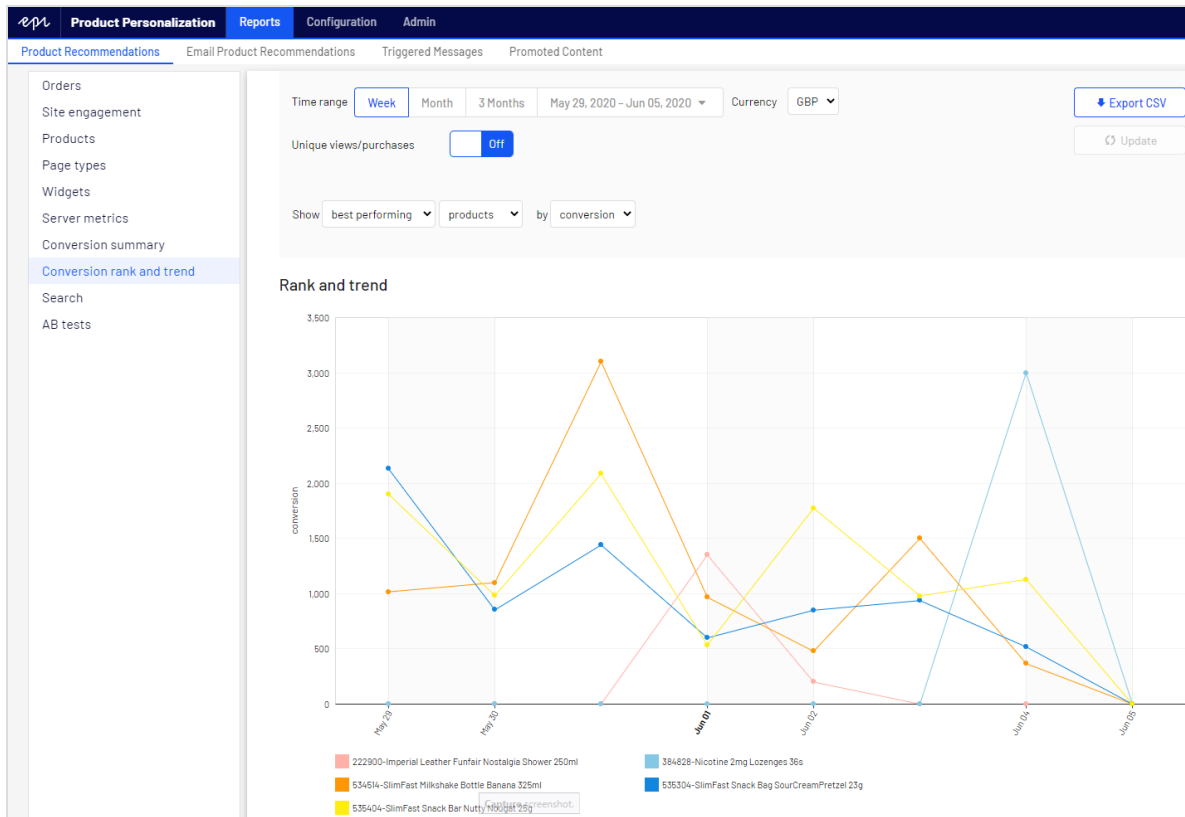
- **High converting, high traffic.** The best 10 best converting products on the site from the top 30% of products with most page views.
- **High converting, low traffic.** The best 10 best converting products on the site from the 40% of products with the least page views, excluding the 10% of products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



Rank and trend view

The **ConversionRank 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.



Search tab

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

Term	Instances	Unique visitors
*** Empty Search Keywords ***	58,035	41,981
search	653	557
red technique	336	284
roxksaurus	329	282
glitter glue	329	298

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 Product Recommendations A/B test on a site, and past tests.

	testA	testB	Var %
Sessions	1368642	1368859	-0.06 %
Unique visitors	1297979	1298947	0.07 %
Revenue (GBP)	1,079,501.11	1,078,866.52	-0.13 %
Orders	50416	50805	0.70 %
Items	290120	295774	1.87 %

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.

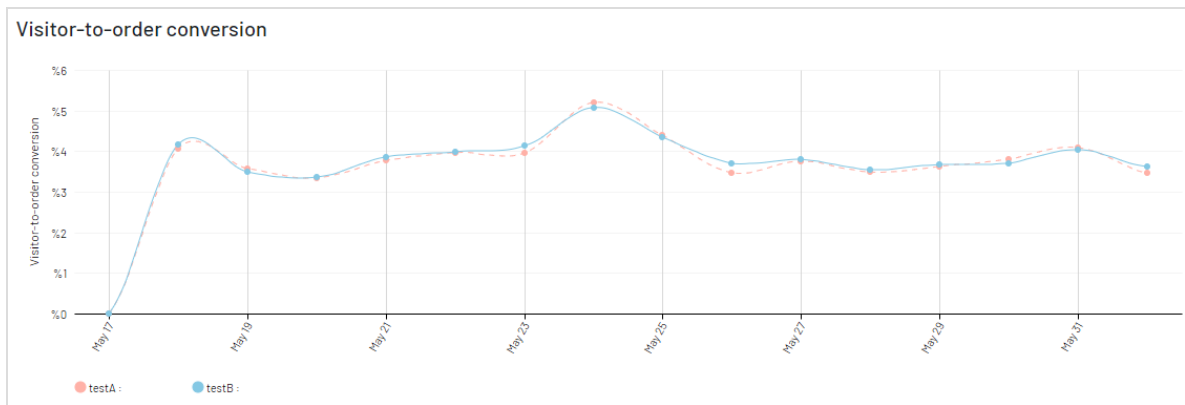
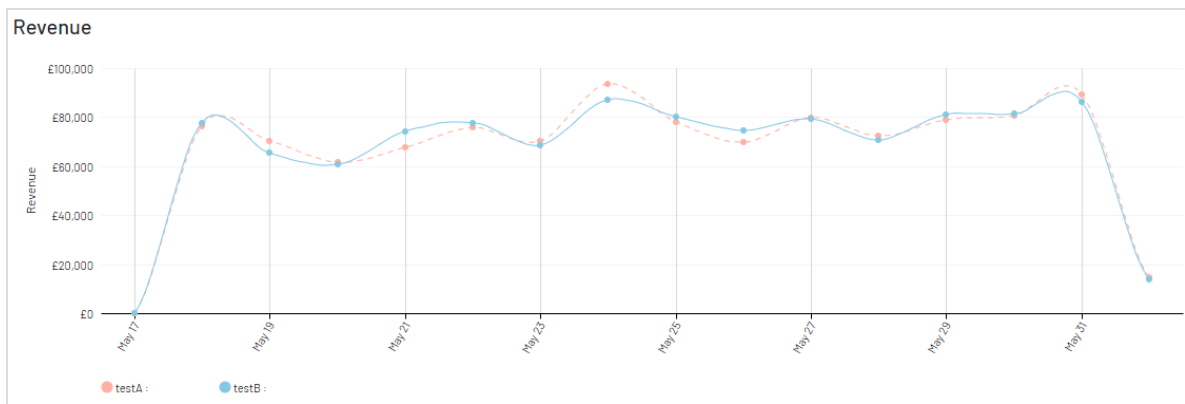
Note: A/B testing supports up to 5 groups so you can view A-to-E testing.

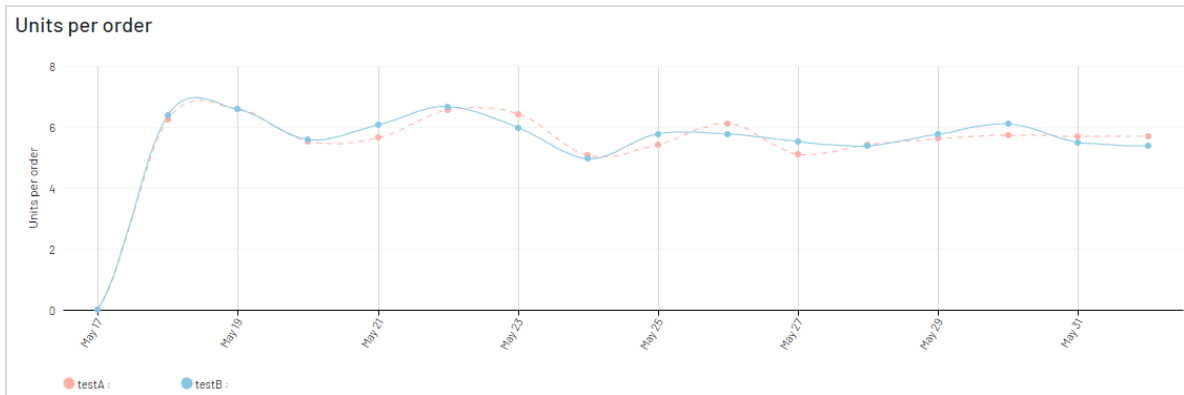
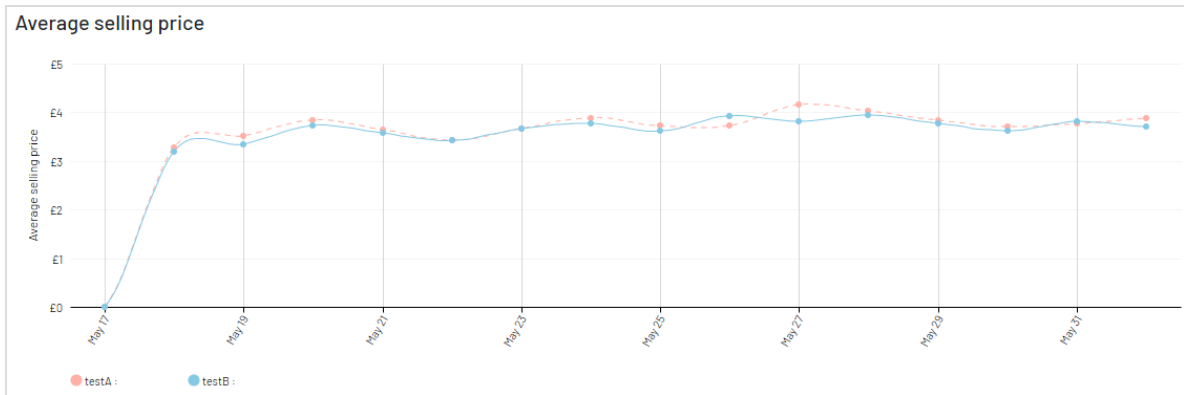
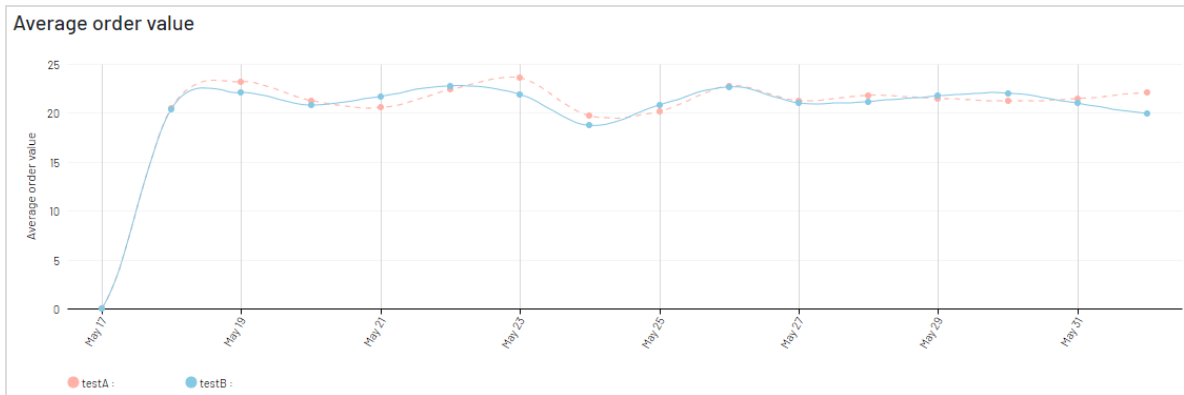
- Select a specific currency that you want to examine.
- In the table you can view and compare key metrics on the site between all test groups, such as:
 - Visitor sessions
 - Site revenue
 - Conversion rate

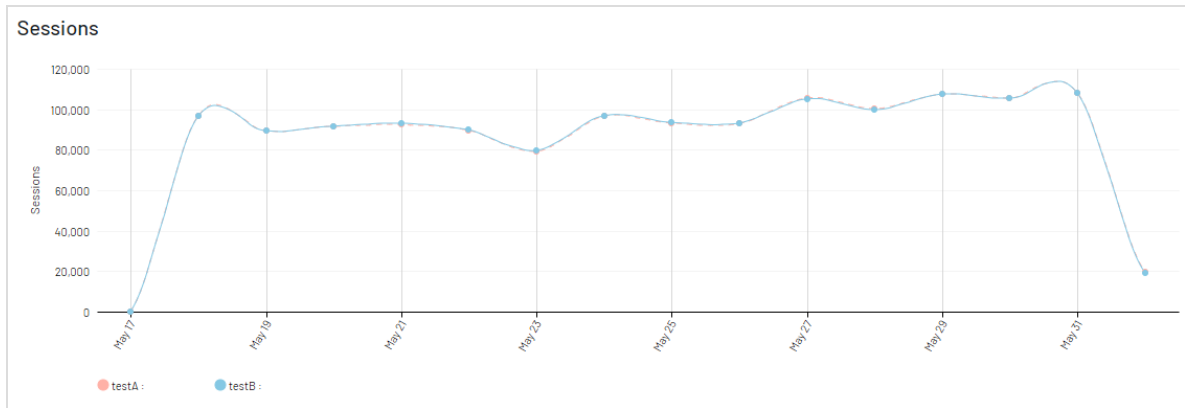
- Average order value through average selling price and units per order
- Recommendation engagement and revenue

Daily charts

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

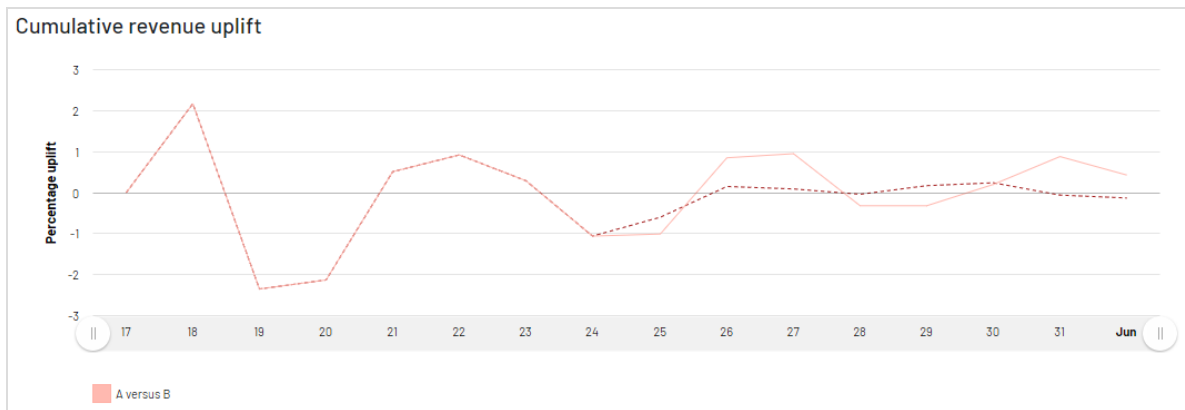


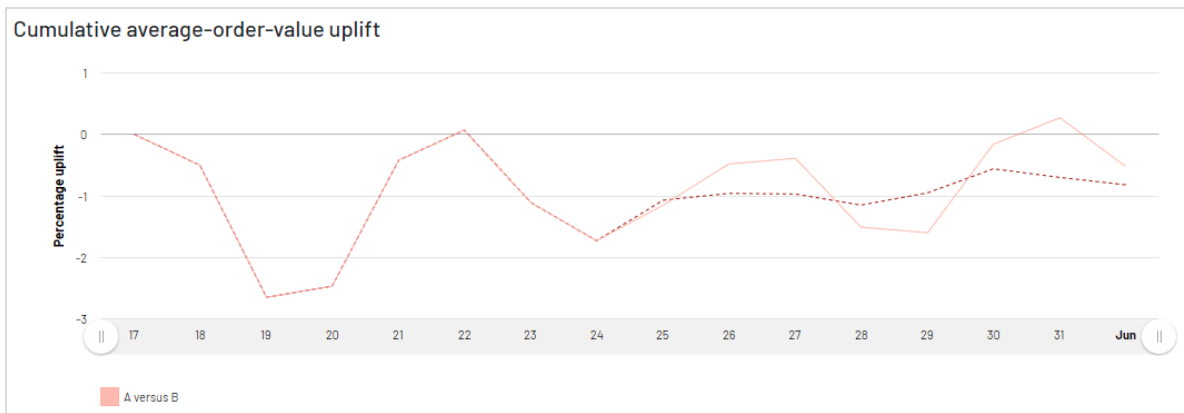
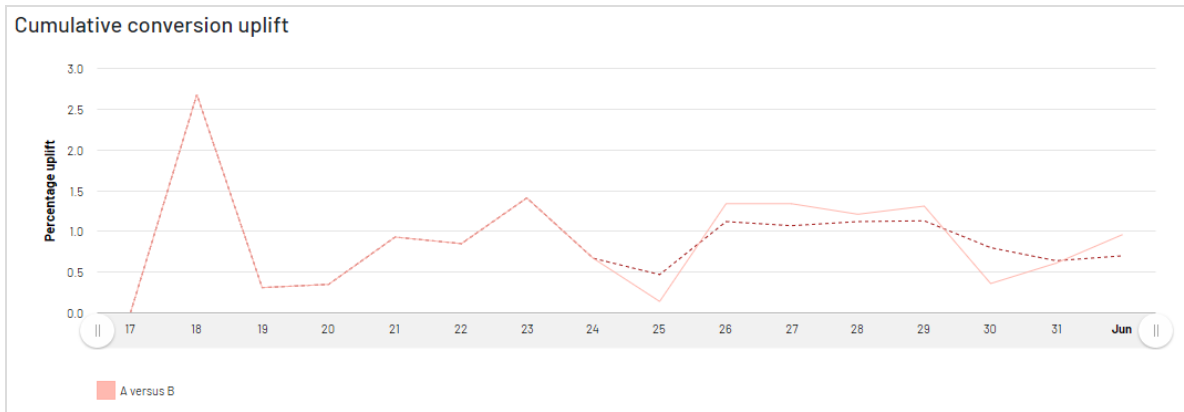




Uplift charts

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





Summary tab

Numbers Daily charts Uplift charts **Summary**

A	B

Email Recommendations

Note: The [Optimizely Digital Experience Platform](#) contains many features to support you in your daily work. Depending on how your solution is set up, some features described in this documentation may not be available to you. Contact your system administrator to find out more. See [Optimizely World](#) for technical information.

Email Recommendations enriches a campaign by adding personalized product or content suggestions to the email template. Also, marketers can construct the entire email around personalized product or content suggestions for the ultimate 1-to-1 email communication. Email Recommendations dramatically increases click-through-rates and engagement to drive more revenue through the email channel.

You can send email recommendations with products or content with Email Product Recommendations and Email Content Recommendations. Configuring email for either product or content recommendations is similar. Each type generates HTML links to insert into your email templates.

Each email recipient gets dynamically generated, personalized product or content recommendations that are based on individual browsing behavior of the visitor on your website. So, each recipient gets personalized product or content suggestions that are relevant to the individual.

- Use **Email Product Recommendations** in email marketing campaigns, and in transactional and automated triggered emails such as abandoned basket, welcome messages, order confirmation, order dispatched messages, and so on. See [Creating an Email Product Recommendations campaign](#).
- Use **Email Content Recommendations** in email campaigns where you want to provide relevant content to your customers. See [Creating an Email Content Recommendations campaign](#)

Configuring Email Recommendations is simple with options for strategy, filtering, and fine-tuning. The recommendations tool is ESP-agnostic and there is no complex integration required.

Optimizely tracking and Email Recommendations assign a unique Customer User ID (CUID) to any device the visitor is using to connect to your website. When a visitor identifies him- or herself on the site—by logging in, browsing your site, placing an order, or otherwise providing an email address, or by clicking a product or content recommendation in an email they received - Optimizely automatically converts the CUID into a KUID (Known User ID) that links behavior that is tracked on the device to the user's email address. This enables instant delivery of product or content suggestions according to specified strategies, and the visitor's behavior.

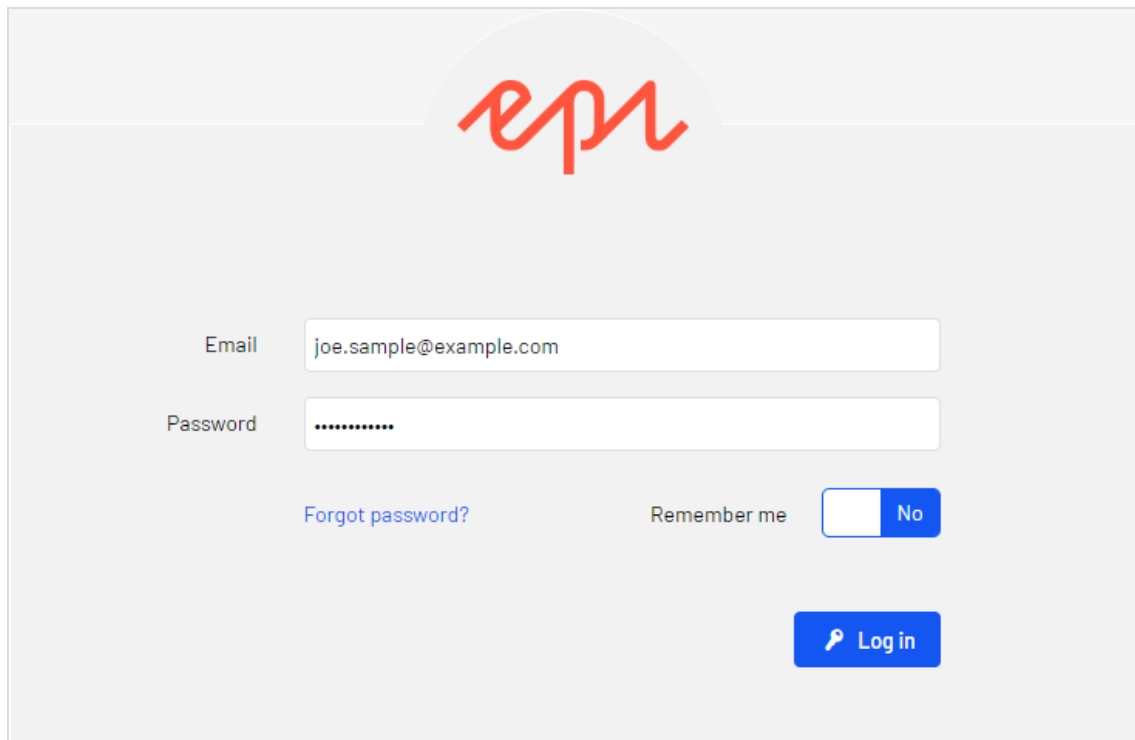
If a visitor connects on another device, Optimizely automatically connects the different CUIDs to a single KUID associated with that email address. In this way, personalization works consistently across the devices with which a visitor engages.

You can add HTML links to your campaign to generate the images within the campaign.

Logging into email recommendations

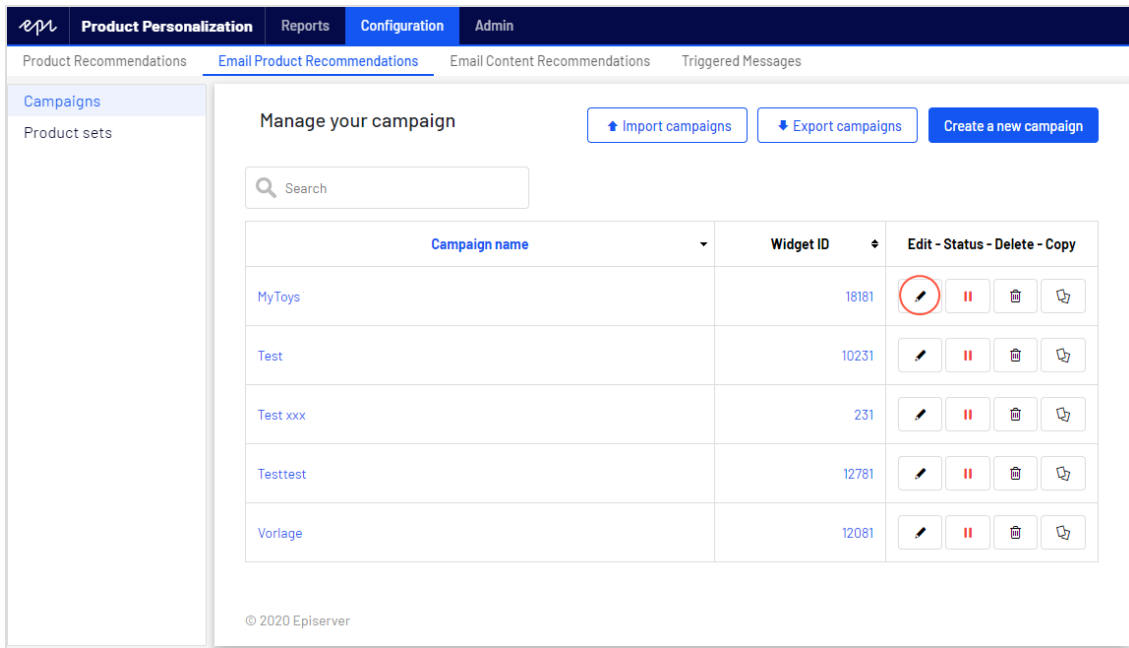
You can access Email Recommendations through the Optimizely for the Personalization Portal.







1. Log in to the for the Personalization Portal with your credentials. If you do not have your login details, contact developers@optimizely.com.



The image shows a login interface for a system with the logo 'epm' in red. The interface includes two input fields: 'Email' containing 'joe.sample@example.com' and 'Password' containing a masked password '.....'. Below the password field, there is a blue link for 'Forgot password?' and a 'Remember me' toggle switch currently set to 'No'. A blue 'Log in' button with a key icon is positioned at the bottom right of the form area.


2. Click the **Configuration** tab in the navigation bar. In **Email Product Recommendations** and **Email Content Recommendations**, you can create a new campaign, and view or edit the campaigns that you have already set up.



- **Edit.** Click **Edit**  or a campaign name to open the configuration page for that campaign.
- **Status.** Click **Activate it**  to switch on a campaign or **Pause it**  to switch off a campaign.
- **Delete.** Click **Delete**  to delete a campaign. A confirmation box appears.
- **Copy.** Click **Copy**  to create a duplicate of an existing campaign. Then click **Edit**  for the new campaign to make changes to it.

Creating an Email Content Recommendations campaign

Note: Email Content Recommendations is part of the [Optimizely Digital Experience Platform](#). It requires a specific installation and license. The Optimizely Digital Experience Platform contains many features to support you in your daily work. Depending on how your solution is set up, some features described in this documentation may not be available to you.



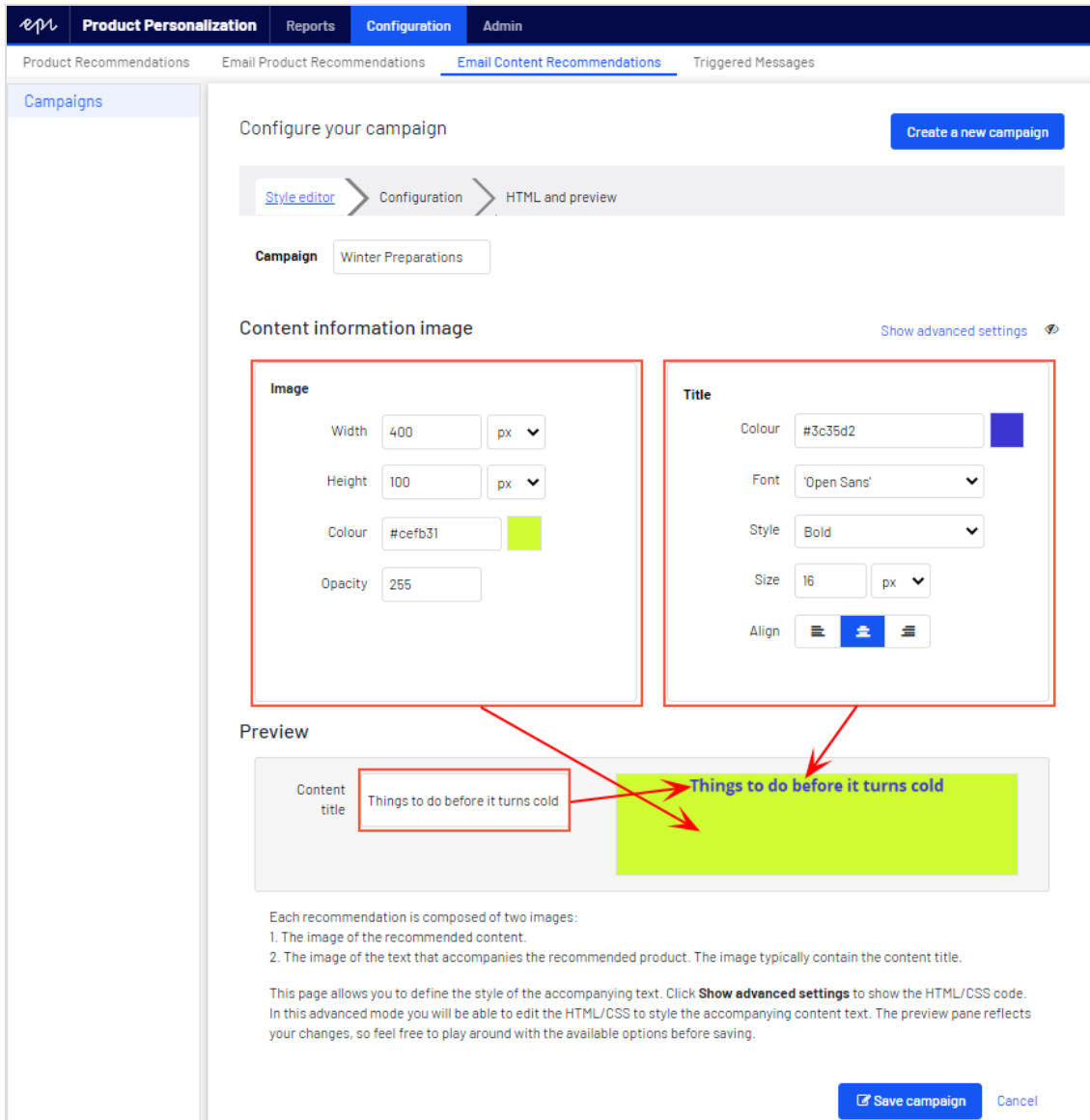
Contact your system administrator to find out more. See [Optimizely World](#) for technical information.

Email Content Recommendations lets you deliver relevant content to customers by email.

To create a new Email Content Recommendations campaign:

1. Select **Configuration > Email Content Recommendations**.
2. Click **Create a new campaign**.

3. Configure your campaign.



- **Campaign.** Enter a name for your Email Content Recommendations campaign.
- **Image.** Modify the dimensions (number of pixels) and background color (hexadecimal values) of the content information image. **Opacity** (0-255) modifies the background color so that you can have an opaque-to-transparent background.

Note: The size of the actual product image will not change because that image is delivered with the same size as it is provided from your system to Optimizely in the product catalog feed.

- **Title.** Modify the font attributes and alignment of the content title.
 - **Preview > Content title.** Add a title to each content item, which shows in the preview.
4. Click **Save Campaign**. Your new campaign appears in the list, where you can edit, delete, and copy the sets.

Manage your campaign Create a new campaign

Campaign name	Campaign ID	Edit - Status - Delete
Winter Preparations	Ra8WsU3M	<div style="display: flex; gap: 5px;"> ✎ ⏸ 🗑 </div>

5. In the **Configuration** step, specify how many content recommendations you want to appear.

Note: You must have a valid API key to send recommendations. If no recommendations match a recipient's profile information to provide relevant content, you can send a fallback email that contains latest content, ordered by descending published date.

Configure your campaign Winter Preparations Create a new campaign

Style editor > Configuration > HTML and preview

Number of recommendations

API Key

Fallback Yes

Save campaign Cancel

6. In the **HTML and preview step**, you can generate the HTML code that is added to your email template, and preview the output of the Email Content Recommendations widget.

Configure your campaign Winter Preparations Create a new campaign

Style editor > Configuration > [HTML and preview](#)

Generate HTML code

Email service provider Episerver Campaign

Variables

Email address

[Generate code](#)

Preview

[Preview email](#)

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

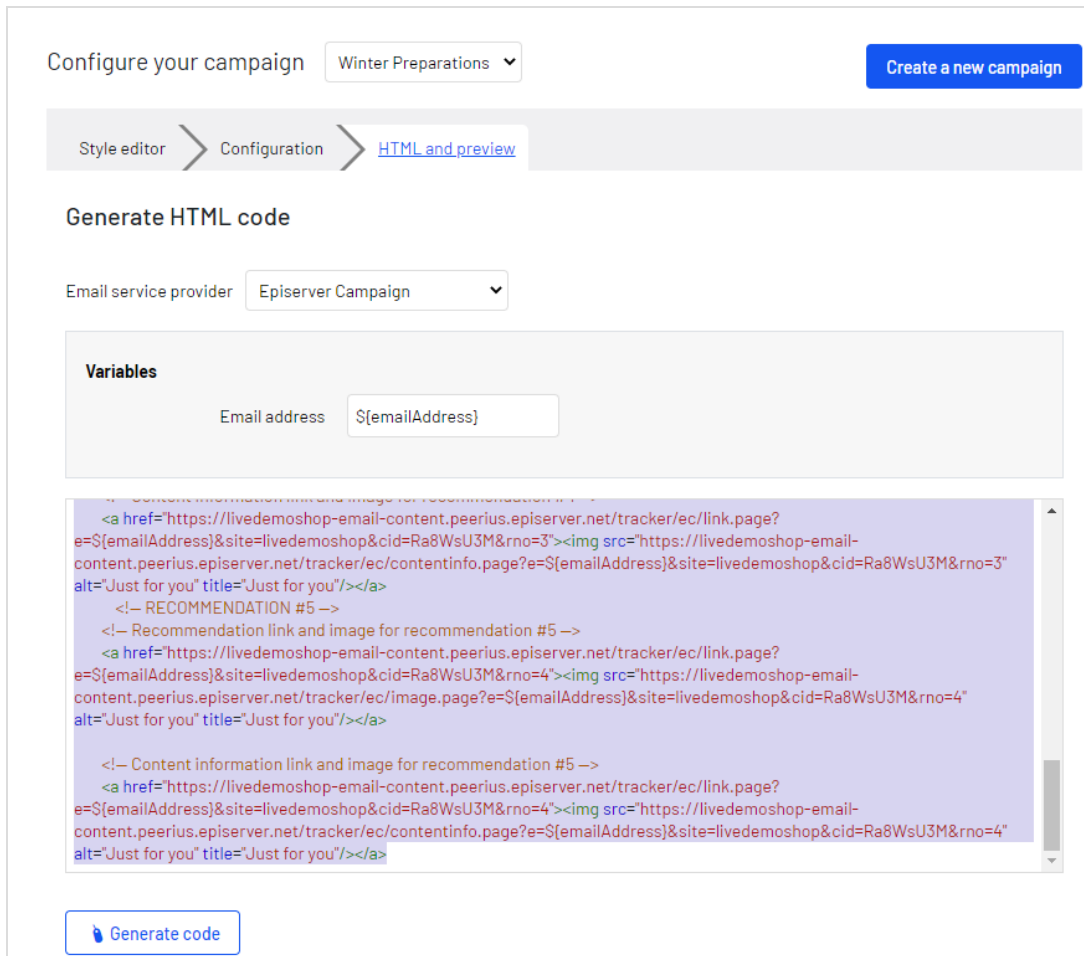
- Select your ESP from the **Email service provider** drop-down list. A **Variables** section appears.

If you do not see your ESP, you can manually insert your ESP email variable in the **Email address** variable field. This information is available from your ESP, so contact your ESP account manager or support team, if you are unsure what the correct variable is.

Note: The **Email address** variable is required to let Optimizely identify the user by their email to serve personalized recommendations that are specific to the user. Upon sending an email, your ESP populates the variable in the link with the recipient's email address. If

the variable is not present or is incorrect, Optimizely is not informed of the user's email address, and therefore cannot personalize the recommendations.

- b. Click **Generate code**. The generated HTML code appears.



- c. Copy and paste the HTML code into your email template to retrieve recommendations.

The generated HTML code is annotated to clearly show the links for each content recommendation. The code does not include any other formatting. You can add HTML and CSS in your template to style the recommendations, such as adding them to a table.

Previewing your campaign

To preview the output of the configuration you have set up, click **Preview email**.

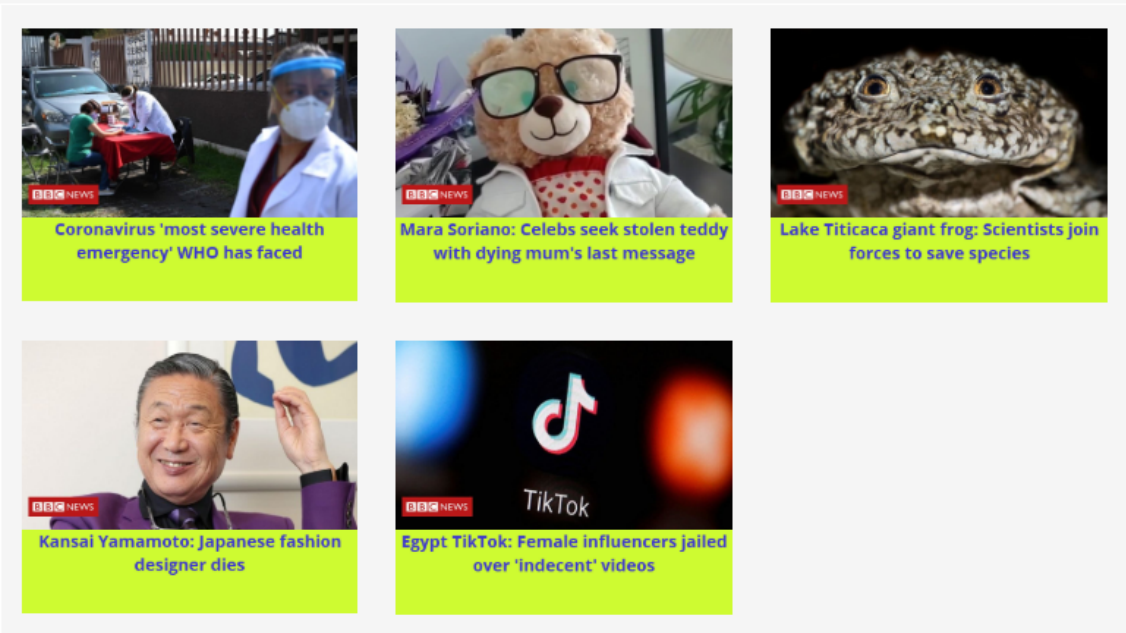
Preview or send a test email

[Preview email](#)

When you preview the recommendations in for the Personalization Portal, a sample output appears for the email address you entered. You can try out different email addresses to see how the recommendations may look for different users.

Hello,

This is an example of what the Episerver recommendations widget will look like in an email.



- Coronavirus 'most severe health emergency' WHO has faced**
- Mara Soriano: Celebs seek stolen teddy with dying mum's last message**
- Lake Titicaca giant frog: Scientists join forces to save species**
- Kansai Yamamoto: Japanese fashion designer dies**
- Egypt TikTok: Female influencers jailed over 'indecent' videos**

Creating an Email Product Recommendations campaign

Note: Email Product Recommendations is part of the [Optimizely Digital Experience Platform](#). It requires a specific installation and license. The Optimizely Digital Experience Platform contains many features to support you in your daily work. Depending on how your solution is set up, some features described in this documentation may not be available to you. Contact your system administrator to find out more. See [Optimizely World](#) for technical information.

Email Product Recommendations lets you deliver product recommendations to customers by email.


To create an Email Product Recommendations campaign, select **Configuration > Email Product Recommendations**. In the **Campaigns** section, click **Create a new campaign**. There are three main steps in the set-up process:

1. [Styling the product information image](#)
2. [Configuring recommendation strategies](#)
3. [Previewing and generating the recommendations code](#)
 - a. [Generating the HTML code to add to your template](#)
 - b. [Previewing your campaign](#)

Styling the product information image

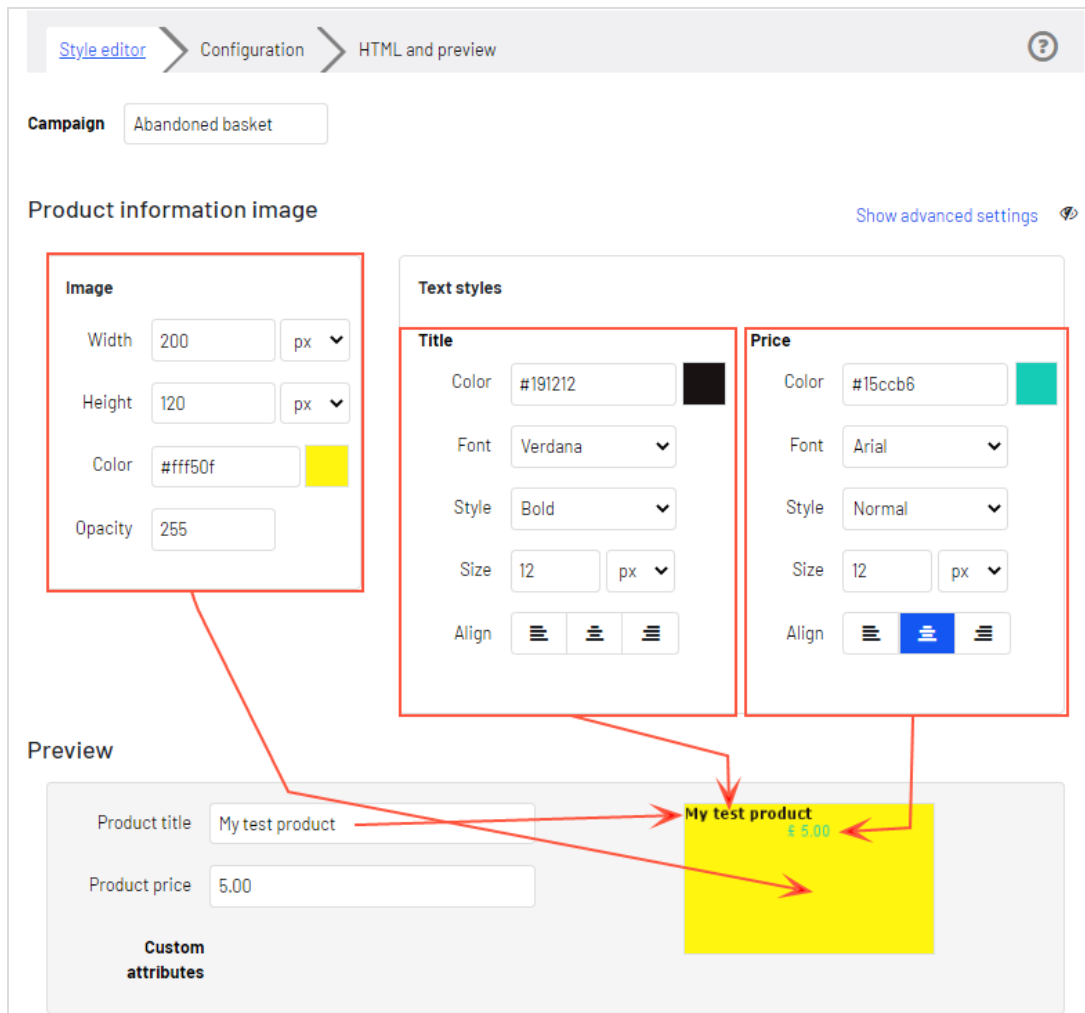
The **Style editor** step lets you configure the way the product information image appears for email recommendations. Your modifications are displayed in the **Preview** section.

- **Campaign.** The name of your Email Product Recommendations campaign.
- **Image.** Modify the dimensions (number of pixels) and background color (hexadecimal values) of the product information image. **Opacity** modifies the background color so that you can have a transparent background.



Note: The size of the actual product image will not change because that image is delivered with the same size as it is provided from your system to Optimizely in the product catalog feed.

- The **Text styles** section defines the font attributes:
 - **Title**. Modify the font attributes and alignment of the product title.
 - **Price**. Modify the font attributes and alignment of the product price.



Click **Show advanced settings** to edit HTML and CSS for the image. You can edit other elements, such as displaying *Was* prices or product ratings. The product information image is rendered in a similar way that a browser does, so you can use standard HTML and CSS.

In advanced mode you will be able to use normal html/css to style these pieces of content.

Advanced [Need help ?](#)

```
<style>
#content {
  background-color:#fff50f;
  width:200px;
  height:120px;
}
#title {
  text-align:left;
  color:#191212;
  font-family:Verdana;
  font-weight:bold;
  font-size:12px;
  display:block;
  clear:both;
}
#price {
  text-align:center;
```

Click **Need help ?** for information about the syntax of variables and logical operations.

The advanced editor allows to directly edit the HTML/CSS code of the product-information image.

This is, in most occasions, preferable. The Episerver engine renders the HTML/CSS code like a browser and supports many cascading style sheets. Also, it supports various placeholders and commands:

Title of the recommended product

Placeholder	Description
<code>\${variable name}</code>	Syntax for variables in URLs (e.g. url="http://server.com/image_{\$rating}.png")
<code>\$title</code>	Title of the recommended product
<code>\$unitPriceGBP</code> <code>\$salePriceGBP</code>	Unit price & Sale price in GBP
<code>\$unitPriceEUR</code> <code>\$salePriceEUR</code>	Unit price & Sale price in Euros
<code>\$unitPriceX</code> <code>\$salePriceX</code>	Unit price & Sale price in X currency
<code>\$discountGBP</code>	Discount percentage for GBP
<code>\$discountEUR</code>	Discount percentage for EUR
<code>\$offGBP</code>	How many pounds cheaper the product is sold.
<code>\$brand</code>	Brand of the recommended product
<code>\$description</code>	Description of the recommended product
<code>\$rating</code>	Rating of the recommended product (when present)

Commands

Command	What does it do?
<code>#if(\$discountGBP>0) \$discountGBP % off! #end</code>	If the product has a discount, it displays the discount percentage.
<code>#if(\$offGBP>0) £ \$offGBP off! #end</code>	If a product has a discount, it displays how many £ cheaper the product is sold.
<code>\$lib.capitalize('help')</code>	Capitalizes the string to <code>HELP</code>
<code>\$lib.abbreviate('help me!',4)</code>	Abbreviates the string to <code>he1p...</code>
<code>\$lib.simpleFormatPrice(\$salePriceGBP,2)</code>	Formats the sale price to 2 decimal digits

Note: You do not have any custom placeholders configured for Mail.

Please contact your account manager if you would like to set up customized attributes for Mail.

Select the **Configuration** step next.

Configuring email recommendations strategies

In the **Configuration** step, specify how many products you want to appear in the Email Product Recommendations campaign, specify localization settings, add

third-party tracking code, and configure the [recommendation strategies](#).

1. Set the number of products you want to display in the campaign in the **Number of products** field.
2. If your site is multi-lingual and is being tracked under a single account in the Optimizely for the Personalization Portal, select the appropriate locale for the Mail campaign. The **Locale** field refers to the language to be used in the text of the product recommendations.

Note: Each campaign should be specific per locale (such as dk, en, se, and so on), and only products that have the locale should be recommended. This is so email recipients get only products that the customer can buy, and not products that might be sold in only some countries or locales where the customer cannot make a purchase. You also can use other filter attributes (such as **allowedcountry** or **exceptioncountry**) to ensure recipients get the best recommendation.

3. If you want to add third-party analytics code to the product recommendations to track their performance in tools such as Google Analytics, Coremetrics, Omniture and so on, add the tracking parameter generated by your preferred analytics tool in the **Tracking code** field.

Configure your campaign Abandoned basket Create a new campaign

Style editor > Configuration > HTML and preview

Widget setup

Number of products

Locale

No repeat (in days)

Tracking

Please insert here any tracking code you want to be added in the product link URL.

Tracking code

Use top-ups?

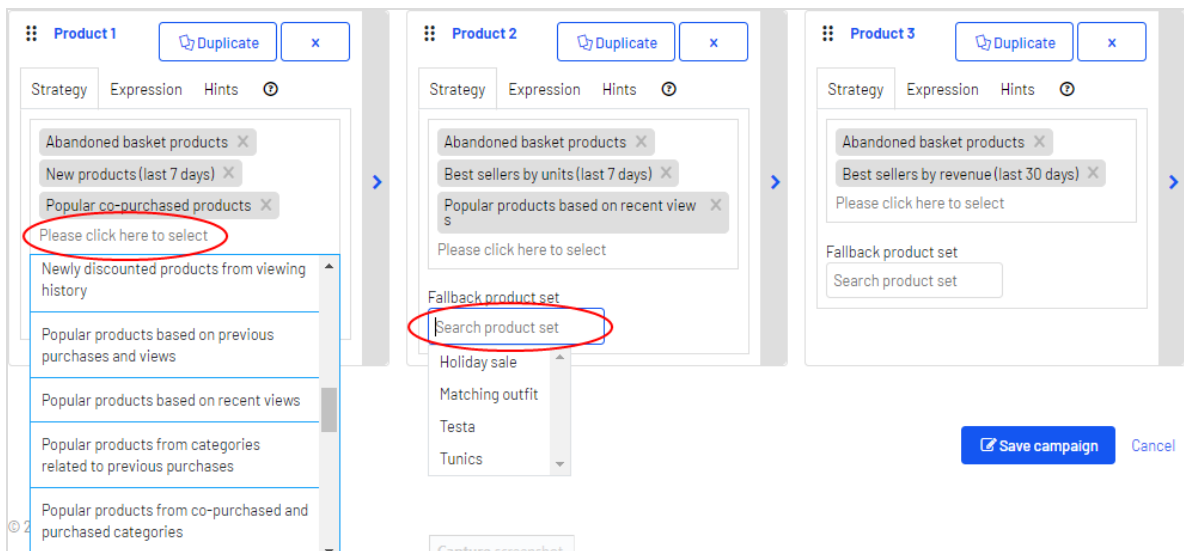
Note: **Use top-ups?** displays a best seller from the last 7 days, if none of the strategies in the stack return a result.

4. In **No repeat (in days)**, set the number of consecutive days that recommendations are not repeated in multiple emails for the same campaign. For example, if you sent a *Daily Deals* type of email and you want to ensure that the recommendations are different, you can select *No repeat in 3 days*. This ensures that if the same user sees the same campaign multiple times in 3 days, the user will see different recommendations.

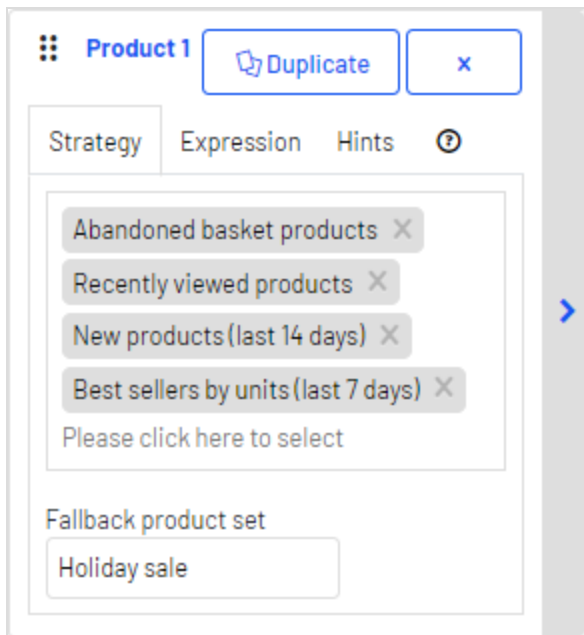
The visual editor displays the number of positions you chose to set up.

In each of the positions, you can choose one or more [different strategies available](#). The strategies in each position are independent of each other. So, you can apply a different strategy or combination of strategies to each position.

Click a Strategy field and scroll through the drop-down list. (You can start typing in the name of a strategy to filter the list.) When you find the strategy you want, click its name to add it to the product position.



You can stack strategies for each position, one after the other, so that the system finds products that match the first strategy in the top line first. If that strategy returns no products, the next strategy in the stack is tried, and so on, until the position is filled. For example, a strategy stack might look like this:



In this example, Optimizely searches for products that were abandoned by the user (based on the email address of the recipient, having browsed or purchased on the site using the same email address). If no product was found, Optimizely uses the second strategy line to find recently viewed products. If it does not find any recently viewed products, it finds new products (recently added to the site) from the past 14 days, and so on, until a matching product is found. See [Creating a product set](#) for information about product sets.

Note: The example strategy also has a fallback product set specified.

- **Reorder the stack of strategies.** Drag and drop a strategy up or down in the list.
- **Reorder product positions.** Grab the button in the top left and drag it to the desired order.
- **Duplicate.** Click **Duplicate** to copy the same strategy stack in another product position.
- **Delete.** Click **X** in the top right corner.

To ensure that there is never a blank position in an Email Product Recommendations campaign, you can do either of the following actions:

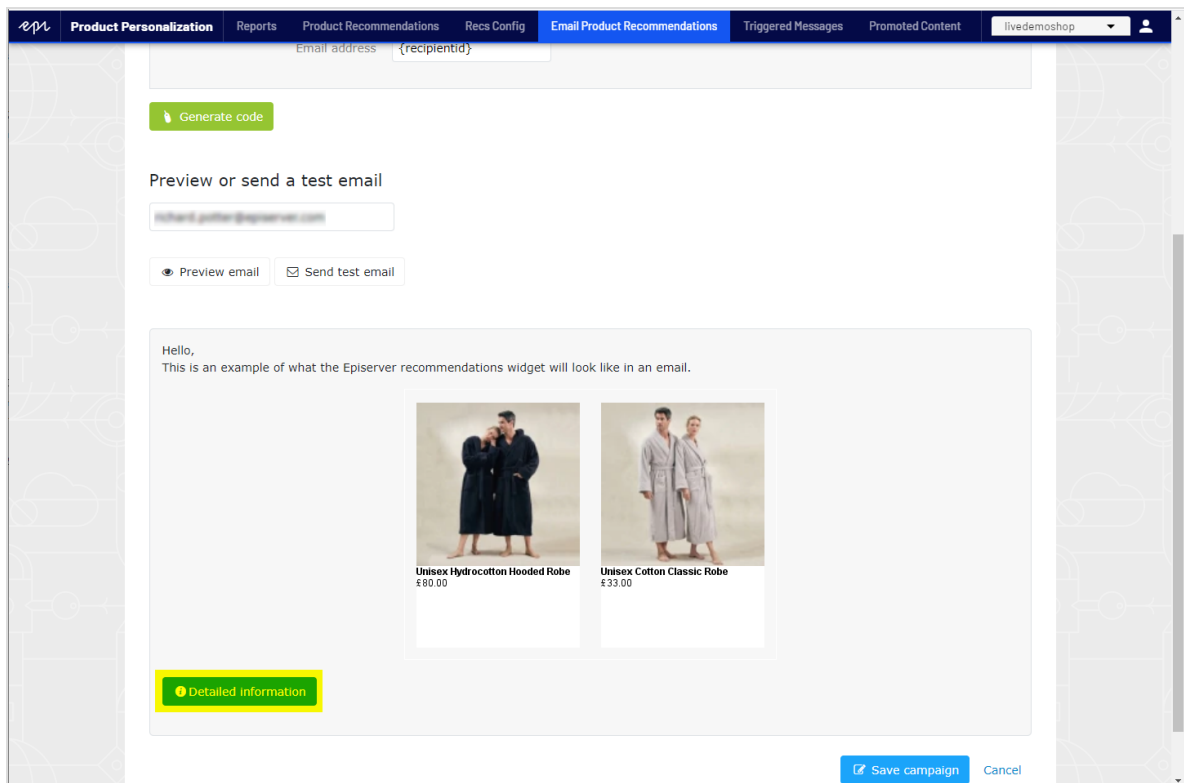
- **Fallback product set.** Select a product set from a list of preselected products that can appear in the recommendations if none of the strategies return a result.

Note: Fallback product sets and top-ups will not follow hints or expressions applied to the product position.

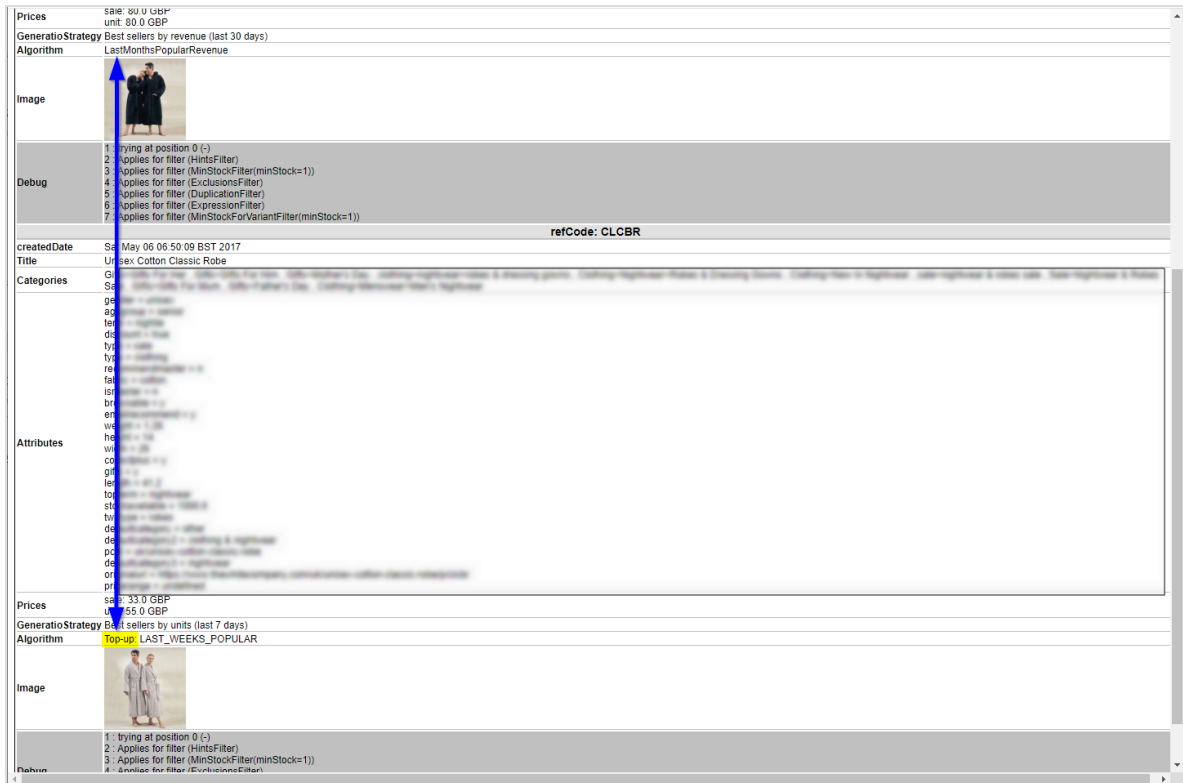
- **Use top-ups** check box. Ensures that the system displays a best seller from the last 7 days, if none of the strategies in the stack return a result.

Note: Empty slots in the widget occur when the Strategies, Expressions and Hints are too restrictive and no results are returned.

You can check if a fallback or top-up was used for a recommendation by looking at the **Detailed Information** on the **HTML and preview** page.



Click **Detailed information** to see expanded data.



Previewing and generating the recommendations code

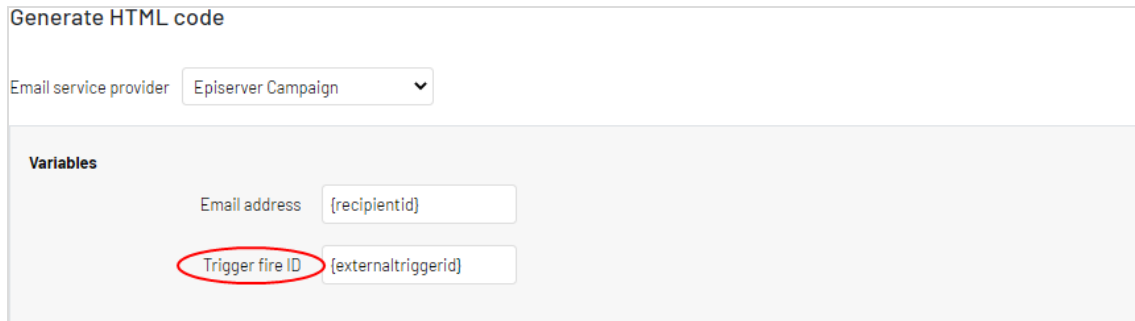
The **HTML and preview** step lets you generate the code that is added to your email template, and lets you preview the output of the Email Product Recommendations widget.

Generating the HTML code to add to your template

1. Select your ESP (email service provider) from the drop-down list to populate the fields for the **Variables**.

If you do not see your ESP, you can manually insert your ESP email variable in the **Email address** variable field. This information is available from your ESP, so contact your ESP account manager or support team, if you are unsure what the correct variable is. (Depending on your client setup, you may

see additional fields for other variables; for example, if you have Triggered Messages and used a trigger strategy in your Email Product Recommendations campaign, a **Trigger fire ID** variable field will be present.)



Generate HTML code

Email service provider

Variables

Email address

Trigger fire ID

Note: The **Email address** variable is required to let Optimizely identify the user by their email to serve personalized recommendations that are specific to the user. Upon sending an email, your ESP populates the variable in the link with the recipient's email address. If the variable is not present or is incorrect, Optimizely is not informed of the user's email address, and therefore cannot personalize the recommendations.

2. After the variable is populated, click **Generate code**. The generated HTML code appears.

Style editor > Configuration > [HTML and preview](#)

Generate HTML code

Email service provider: Episerver Campaign

Variables

Email address: {recipientid}

Trigger fire ID: {externaltriggerid}

```
[externaltriggerid] </a>

<!-- Product information link and image for recommendation #2 -->
<a href="https://partnordemo.peeries.com/tracker/er/link.page?e={recipientid}&site=episerverdemo&wid=78301&rno=1&triggerFireId={externaltriggerid}"></a>
<!-- RECOMMENDATION #3 -->
<!-- Recommendation link and image for recommendation #3 -->
<a href="https://partnordemo.peeries.com/tracker/er/link.page?e={recipientid}&site=episerverdemo&wid=78301&rno=2&triggerFireId={externaltriggerid}"></a>

<!-- Product information link and image for recommendation #3 -->
<a href="https://partnordemo.peeries.com/tracker/er/link.page?e={recipientid}&site=episerverdemo&wid=78301&rno=2&triggerFireId={externaltriggerid}"></a>
```

3. Copy and paste the HTML code into your email template to retrieve recommendations.

The generated HTML code is annotated to clearly show the links for each product recommendation. Each recommendation consists of two images (the product image and the product information image), and each of these is commented so you have the flexibility to use the images in the way you want to best fit your template design.

The generated code does not include any other formatting. You can add HTML and CSS in your template to style the recommendations, such as adding them to a table or resizing the product images.

Previewing your campaign

To preview the output of the configuration you have set up, you can choose one of the following options:

Preview or send a test email

[Preview email](#)

- Preview the email recommendations within the for the Personalization Portal (showing recommendations below the **Preview email** button).

Preview or send a test email

[Preview email](#) [Send test email](#)

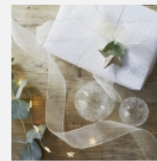
Hello,
This is an example of what the Episerver recommendations widget will look like in an email.



Valencia Bed Linen Collection
£ 15.00



Savoy Bed Linen Collection
£ 25.00



Wired Gold Ribbon - 5m
£ 6.00

[Detailed information](#)

- Send a test email to your email address to view the recommendations within a basic email template. You must enter your email address in the field above the **Send test email** button beforehand.

When you preview the recommendations in for the Personalization Portal, a sample output appears for the email address you entered. You can try out different email addresses to see how the recommendations may look for different users.

You can view information about the recommended products in the preview. Click **Detailed information** below the recommendations to open a new browser tab or window; detailed information appears for each recommended product, and the strategy that generated the recommendation.

Widget : Reach - Abandoned Basket	
Recommendations	
refCode: padding:site:site:2705: algorithm:Product Catalog	
createdDate	Thu Jan 01 00:00:00 UTC 1970
Title	-
Categories	
Attributes	
Prices	
GeneratioStrategy	Best sellers by units (last 7 days)
Algorithm	CATALOG
Image	
Debug	
refCode: padding:site:site:2705:sales_uk:algorithm:Product Catalog	
createdDate	Thu Jan 01 00:00:00 UTC 1970
Title	-
Categories	
Attributes	
Prices	
GeneratioStrategy	Best sellers by units (last 7 days)
Algorithm	CATALOG
Image	
Debug	
https://www.optimizely.com/tracker/er/debugInfo.page?e=some_one%40episerver.com&site=sales_uk&wid=77901&isPreview=true&triggerId=-1&refCodes=	

Email Product Recommendations strategies

The following table shows Email Product Recommendations strategies.

Strategy	Description
Abandoned basket products	Shows products that were added to the basket but not purchased. Only baskets abandoned within the last 90 days and products currently available are considered.
Best sellers by conversion (last 90 days)	Show best sellers based on conversion rate from the last 90 days, and the categories that the customer viewed.
Best sellers by revenue (last 30 days)	Show products that generated the most revenue on site in the last 30 days. This strategy also takes categories into account; that is, it gives bias to products that sold well, and are in the same category with which the customer has most interacted.
Best sellers by revenue per product view (last 90 days)	Show products that generated the most revenue per numbers of views in the last 90 days. This strategy also takes categories into account; that is, it gives bias to products that sold well, and are in the same category with which the customer has most interacted.

Strategy	Description
Best sellers by units (last 7 days)	Show best sellers based on number of products sold in the last 7 days.
Best trending (last 30 days)	Show products that are gaining popularity; that is, whose unit sales are growing the most in the last 30 days.
Best trending based on previous purchases and views	Show products that are gaining popularity; that is, whose unit sales are growing the most, based on the customer's previously viewed products and purchase history.
Co-purchased products based on previous purchases	Show products that other customers also ordered when purchasing the same product as the customer, and that are in any category from which the customer has purchased.
Co-purchased products based on wishlist	Show products bought together with products the customer has in their wish list.
Co-viewed products based on wishlist	Show products viewed together with products the customer has in their wish list.
Cross-sells from previous purchases and views	Show products bought together with products the customer bought and viewed in the past.
New Products (last 7/14/30 days)	Show products recently added to the site (in the last 7, 14 or 30 days).
New products from purchased categories (last 120 days)	Show new products from categories from which the customer previously made a purchase (in the last 120 days).
Newly discounted products based on viewing history	Show recently discounted products related to products that the customer previously viewed.
Newly discounted products from viewing	Show recently discounted products that the customer previously viewed.

Strategy	Description
history	
Popular co-purchased products	Show popular items based on the customer's purchased products (biased towards the most recently bought product).
Popular products based on previous purchases and views	Show popular items from categories from which the customer recently made a purchase. If not enough are found from purchased categories, it shows popular products from categories that the customer recently viewed.
Popular products based on recent views	Show popular products based on the customer's recently viewed products.
Popular products from categories related to previous purchases	Show popular items from categories that are related to categories from which the customer made a purchased.
Popular products from co-purchased and purchased categories	Show products that other customers bought together with the same product as the customer, and are in the same or related category from which the customer made a purchase.
Popular products from co-purchased categories	Show products that other customers bought together with the same product as the customer, and are in a related category from which the customer made a purchase.
Products from daily trigger campaigns	Used only with Triggers. Show products from daily trigger campaigns, such as Targeted discounts, High product interest, Post purchase, Low-in-stock abandoned-basket.
Products from in-session trigger campaigns	Used only with Triggers. Show products from in-session trigger campaigns, such as Abandoned basket, Abandoned browse, Abandoned checkout.
Recently purchased products	Show products the customer purchased, the most recent first.
Recently viewed products	Show products the customer recently viewed.

Strategy	Description
Recommendations based on abandoned basket	Show related products based on the customer's abandoned basket items (biased towards the most recently abandoned product).
Recommendations based on the customer's popular views	Show popular products from categories that the customer browsed most.
Recommendations based on daily trigger campaigns	Used only with Triggers. Show related products based on the daily trigger used, such as Targeted discounts, High product interest, Post purchase, Low-in-stock abandoned-basket.
Recommendations based on in-session trigger campaigns	Used only with Triggers. Show related products based on the in-session trigger used, such as Abandoned basket, Abandoned browse, or Abandoned checkout for the current session.
Recommendations based on recent basket additions	Show popular items based on products the customer added to basket.
Recommendations based on specified product refCodes	Show recommendations based on what other customers purchased or viewed with the specified products. To use this strategy, a client needs to fill the value of the refCode variable in Mail recommendations links with product refCodes (for example, from a customer's order) and then the recommendations returned are based on those refCodes.
Recommendations from the category specified in Hints	Show products from a particular category, which needs to be specified in the Hints section using the hint category.
Recommendations from categories of purchased products (last 365 days)	<p>Show products from categories customer has purchased something within last 365 days.</p> <p>Note: In Germany, you can send email marketing advertisements to recent customers without explicit consent according</p>

Strategy	Description
	to §7 Abs. 3 UWG, as long as the advertised products are "similar," relating to products the customer has already purchased within the past 365 days. Check your local laws.

Personalized and merchandised recommendation strategies

You can use over 30 different [strategies](#) in Email Product Recommendations, singularly or in combination.


- **Personalized strategies.** Depend on the association of personal web behavior to an individual email address. For example, *recently viewed* and *abandoned basket* are linked to actions that a visitor has completed on the website.
- **Merchandised strategies.** Relate specifically and only to products. For example, *best sellers*, *best trending*, and *new products* do not depend on whether the email recipient saw the products.

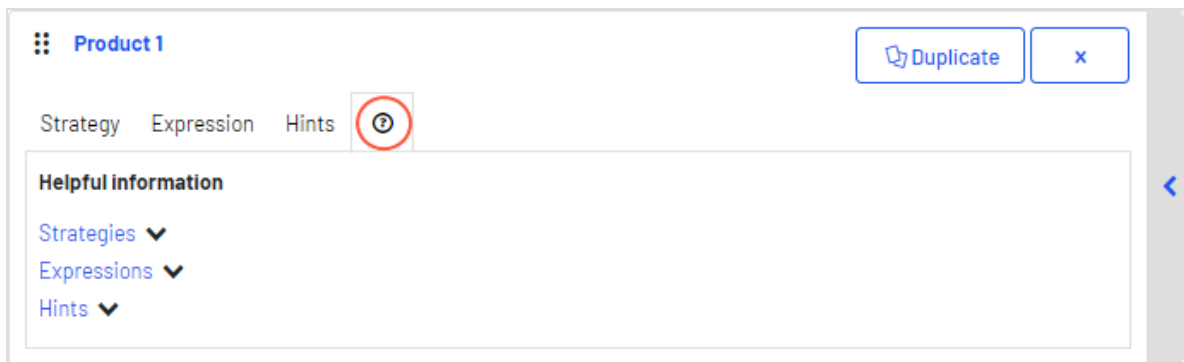
The following table shows personalized and merchandised strategy examples.

Personalized	Merchandised
Abandoned basket products	Best trending (last 30 days)
Cross-sells from previous purchases and views	Best sellers by units (last 7 days)
Newly discounted products from viewing history	Best sellers by revenue (last 30 days)
Popular co-purchased products	New products (last 7/14/30 days)
Recently viewed products	

You should adopt a combination of personalized and merchandised strategies to ensure that emails are optimized to generate the best sales returns.

There is no single best answer for which stack of strategies generates the most engagement because this varies on a client-by-client basis. The nature of what is being sold or offered on a site also is an important consideration because this has a direct bearing on which strategies it is best to deploy. For example, a fashion site will have completely different buying behavior to a site that sells building supplies. A fashion site retailer may want to focus strategies on as much personalization as possible, while a building supplies retailer may want to focus more on the merchandised strategies available that are devised based on the crowd behavior captured. Over time, more emails are personalized as Optimizely associates web behavior to further email addresses.

To see a full list of strategies, expressions, and hints, click **Help**  in any product position to open the Help section.



Filtering strategy results using expressions and hints

To narrow and restrict the recommended products in your Email Product Recommendations campaigns, add rules in the expression and hints sections for each product position. These rules work in conjunction with the configured recommendation strategies by filtering the strategy output using the specified parameters.

- **Expressions.** Explicit rules that the recommended products must match to appear to the email recipient. Expressions ensure that certain product attributes are included in the selection. For example, if you were to use the *Recently viewed* strategy, you could specify an expression to show only those products that were recently viewed and are from a specific brand or category you want to

push. To use a certain product attribute in expressions, pass the attribute and value to Optimizely in the product catalog feeds imported for your site.

- **Hints.** While expressions let you filter by a specific product attribute and its value, and are configured for each product position individually, use **hints** as a broader rule to take into account what other products are recommended in the same campaign. For example, if you use the *Recently viewed* strategy, you may want to exclude items that were previously purchased (*recent purchase*), or show products from the same category. You can do this with a hint (but not with an expression because *recent purchase* is not a product attribute provided in product catalog feeds).

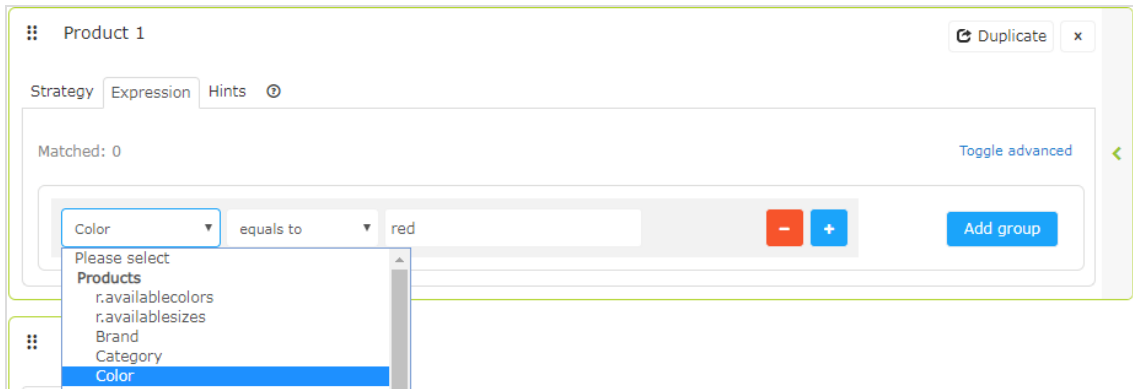
Adding an expression

To add an **expression** to an individual product position:

1. Select the **Expression** tab for the desired position.

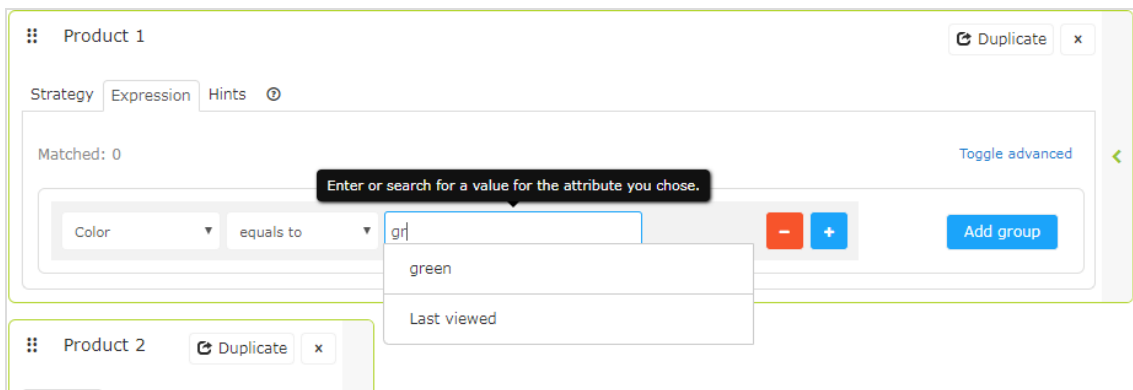
The screenshot shows the 'Expression' configuration interface for 'Product 1'. At the top, there are tabs for 'Strategy', 'Expression', and 'Hints', with 'Expression' selected. To the right are 'Duplicate' and 'Close' buttons. Below the tabs, it says 'Matched: 0' and 'Toggle advanced'. The main area contains a rule builder with a dropdown menu set to 'Color', a comparison operator dropdown set to 'equals to', and a text input field containing 'red'. To the right of the text input are minus and plus buttons, and an 'Add group' button with a close icon.

2. Open the first drop-down list and select the attribute (such as *color*) that you want in the rule (based on the product catalog feed, plus a few attributes Optimizely created by default). If you do not see the attribute that you want, you can add it to your product catalog feed.



3. Select the condition you want in your rule.
 - For attributes that have a text value, such as *Color* or *Brand*, select **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**.
4. In the text field on the right, enter the value of the attribute that is evaluated in this rule. You can start typing in the box to filter the results.

Note: Most attributes have a drop-down list with possible values when you select the text field. For numeric values (such as prices) you will not see a pre-populated list and you will need to enter the value manually, using the decimal point separator (.) and not the comma (,).



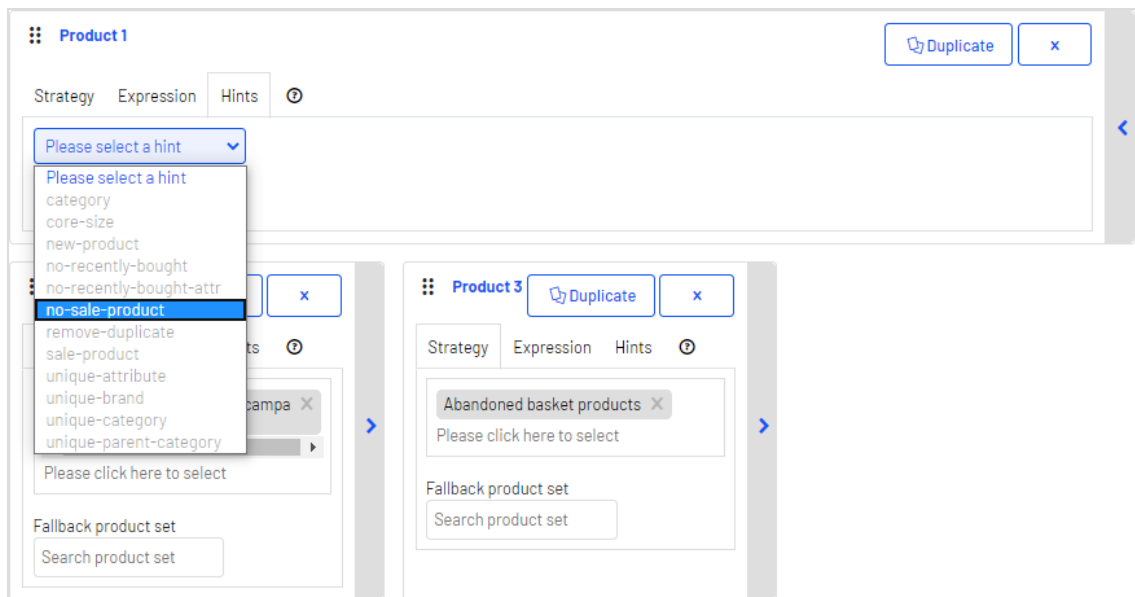
- You can add multiple rules for the same position by clicking **Add group** or plus **+**. When using multiple rules, you can choose to apply one or more of them to the product position, by setting the **AND** or **OR** operator.

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

Adding a hint

To add a **hint** to an individual product position:

- Select the **Hints** tab for the desired position.
- In the drop-down lists select the hint you want to apply. You can apply up to two hints for each product.



You can use hints and expressions in combination, but be aware that the more you add, the more you restrict the range of products from which to choose to generate useful recommendations.

When you have configured the products in the campaign, click **Save campaign**.

Select the **HTML and preview** step next.

Example Email Product Recommendations campaigns

This section lists examples of Email Product Recommendations strategy stacks to use in various types of email campaigns.

BAU newsletter

Selection of personalized products for use in BAU (business as usual) newsletters:

- Abandoned basket products
- Recently viewed products
- Recommendations based on abandoned basket
- Popular products based on recent views
- Cross-sells from previous purchases and views
- Popular products based on previous purchases and views
- Best sellers by conversion (last 90 days)
- Other merchandising strategies or Fallback product set

Welcome email

Selection of personalized products for use in Welcome emails:

- Cross-sells from previous purchases and views
- Popular products based on previous purchases and views
- Recently viewed products
- Newly discounted products from viewing history
- Abandoned basket products
- Recommendations based on abandoned basket
- Best sellers by revenue per product view (last 90 days)
- Other merchandising strategies or Fallback product set

Abandoned basket

Selection of personalized recommended products for use in Abandoned Basket emails:

- Recommendations based on abandoned basket
- Cross-sells from previous purchases and views
- Popular co-purchased products
- Newly discounted products from viewing history
- Popular products from categories related to previous purchases
- Recently viewed products
- Best sellers by conversion (last 90 days)

Order update/cross sell

Selection of personalized products for use in order updates or cross-sell emails sent to users who have purchased on the site:

- Cross-sells from previous purchases and views
- Popular co-purchased products
- Newly discounted products from viewing history
- Popular products based on previous purchases and views
- Co-purchased products based on previous purchases
- Popular products from categories related to previous purchases

Other campaigns and high-level strategy suggestions

- **Marketing emails and newsletters**
 - **Weekly or monthly newsletters**

Show a selection of products to the customer based on the following strategies:

- Abandoned basket products
- Recently viewed products
- Recommendations based on abandoned basket
- Cross-sells from previous purchases and views
- Popular products based on previous purchases and views

If the customer is new to the site (that is, does not have enough behavior tracked by Optimizely), the customer is presented with best trending items on the site and best sellers based on crowd behavior.

○ **Announcement emails**

- **New arrivals.** Similar to the strategies above but boosting products recently added to the site (use the hint new-product).
- **Sale.**
 - Presenting only items on sale
 - A selection of products that a customer viewed on the site and that since were discounted
 - Items on sale related to the customer's browsing and purchasing behavior
 - Abandoned basket products
 - Recommendations based on abandoned basket.

If the customer is new, the customer is presented with popular products on sale and best sellers on the site based on units, revenue, conversion and revenue per product view.

○ **Events/competition emails**

Show a selection of popular products from the customer's favorite categories:

- Popular co-purchased products
- Abandoned basket products
- Recommendations based on abandoned basket
- Best trending products in the customer's favorite categories

If the customer is new, the customer is presented with best sellers and new products on site.

- **Loyalty/reward newsletters**
 - Cross-sells to previously viewed and purchased products
 - Popular items from favorite categories
 - Abandoned basket products
 - Recommendations based on abandoned basket
 - Recently viewed products
 - Best sellers in favorite categories
- **Transactional and system emails**
 - **Registration /account creation confirmation emails.**
 - Cross-sells to previously viewed and purchased products
 - Popular items from viewed and purchased categories
 - Recently viewed products
 - Abandoned basket products
 - Newly discounted products from viewing history
 - Best trending products in favorite categories

If the customer is new, the customer is presented with a mix of Best trending and Best selling items.

- **Order confirmation**
 - Cross-sells to the purchased items
 - Popular co-purchased products
 - Recommendations based on abandoned basket
- **Order dispatched**
 - Cross-sells to the purchased items
 - Popular co-purchased products
 - Recommendations based on abandoned basket
- **Abandoned basket/browse**
 - Recommendations based on the abandoned products.
 - Customer's previous buying and viewing behavior.

Creating a reusable email template

Every campaign has one template comprised of the values in the **Image**, **Text styles**, and **Advanced** options. You can develop complex HTML and CSS coding in the options of a campaign, which generates the image in the preview.

You may have many campaigns, each having the same styling and code.

If you have the same styling and code in more than one campaign, you can manually change the options in each campaign. However, you can save these options to a named template so that other campaigns can use the same template. Making changes to a saved template applies to all campaigns that use the template, saving time and improving maintenance of your campaigns.

This topic shows how to:

- create an email template independently from email campaigns.
- assign the email template to new or existing campaigns.

Creating an email template from the template view

1. Go to **Configuration > Email Product Recommendations > Reusable templates**.
2. Click **Create a new template**. A new template page appears:
 - a. Enter a name for the new template.
 - b. Specify values for **Image**, **Text styles**, and **Advanced** editable code (click

Show advanced settings).

Configure your reusable product image template Create a new template

Template name

Product information image Show advanced settings

Image

Width px

Height px

Color

Opacity

Text styles

Title	Price
Color <input type="text" value="#3e325e"/> 	Color <input type="text" value="#000000"/>
Font <input type="text" value="Verdana"/>	Font <input type="text" value="'Ubuntu'"/>
Style <input type="text" value="Normal"/>	Style <input type="text" value="Normal"/>
Size <input type="text" value="24"/> px	Size <input type="text" value="22"/> px
Align <input type="text" value="center"/>	Align <input type="text" value="center"/>

Preview

Select product

Product title

Product price

Custom attributes

brand

discount_bool

lcat

magentoproductid

material

pricerange

size

term

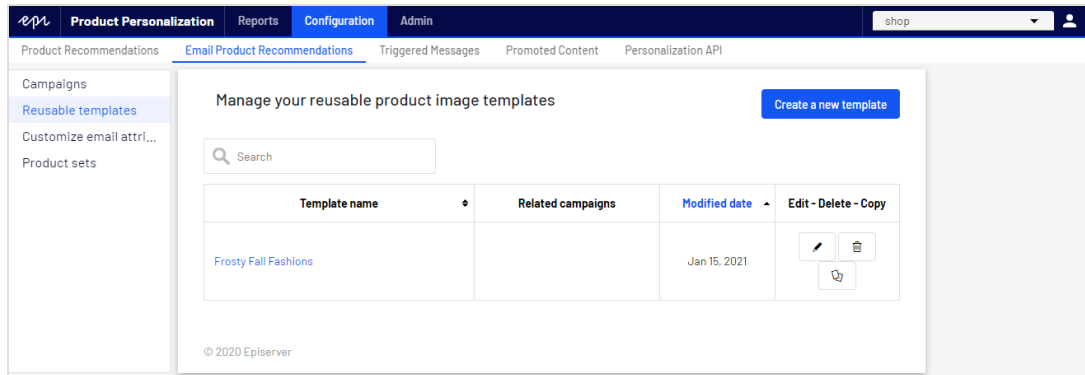
Blue Birdseye
English Suit
Waistcoat
£100.00

Each recommendation is composed of two images:
 1. The image of the recommended product.
 2. The image of all the text that accompanies the recommended product, i.e. the product title, the product price, a discount and so on.

This page allows you to define the style of the accompanying text. Click **Show advanced settings** to show the HTML/CSS code. In this advanced mode you will be able to edit the HTML/CSS to style the accompanying product text. The preview pane reflects your changes, so feel free to play around with the available options before saving.

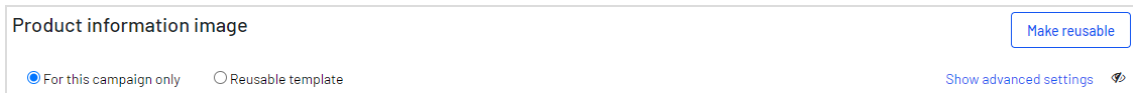
Save template Cancel

- c. Click **Save template**. The template name appears in the template view.



Creating an email template from an existing campaign

1. Go to **Configuration > Email Product Recommendations > Campaigns** and select a campaign from the list.
2. Modify the campaign values.
3. Select **For this campaign only**.



- **For this campaign only**. Default. The template is used in the current campaign only; keeps **Image**, **Text styles**, and **Advanced** editable code.
 - **Reusable template**. When selected, a drop-down list of reusable templates appears. Selecting a template overwrites the values with the saved template values. See [Reusing a saved template](#)
4. Click **Make reusable** to save the template for use in other campaigns. A dialog box appears.

- Enter a name for the new template.

- Click **Save**. The radio button selection changes and the saved template appears in the **Reusable template** field (and in the **Reusable templates** view).

The **Reusable templates** view shows saved templates, the campaigns to which each template is assigned, and the modified date. You can **Edit**, **Delete**, and **Copy** each template.







Template name	Related campaigns	Modified date	Edit - Delete - Copy
Autumn highlights		Jan 15, 2021	[Edit] [Delete] [Copy]
Frosty Fall Fashions		Jan 15, 2021	[Edit] [Delete] [Copy]

Note: Deleting a template removes the template from the list; it does not delete the template values from the original campaign. For example, if you delete *Autumn highlights*, the campaign from which *Autumn highlights* was created retains its template values. Any other campaign that used

Autumn highlights also retains its values.

Editing an email template

When you change and save a template, the changes are applied to each campaign that uses the template, which are listed in the **Related campaigns** column of the **Reusable templates** view. For example, if you modify *Autumn highlights*, the changes are applied to both the *AUTUMN EMAIL CAMPAIGN* and the *Bulk Powders* campaigns.

Template name	Related campaigns	Modified date	Edit - Delete - Copy
Autumn highlights	AUTUMN EMAIL CAMPAIGN Bulk Powders	Jan 15, 2021	  
Frosty Fall Fashions	AAAA	Jan 15, 2021	  

1. Go to **Configuration > Email Product Recommendations > Reusable templates**.
2. Select a template from the list. (Double-click the template name, or click **Edit**.)
3. Make changes.
4. Click **Save template**.

Reusing a saved template

To use a saved template for more than one campaign, do the following:

1. Go to **Configuration > Email Product Recommendations > Campaigns** and select a campaign from the list.
2. On the **Style editor** tab, select **Reusable template**. A drop-down menu appears where you can select a saved template. The selected template populates the current campaign fields. **Image**, **Text styles** and **Advanced** options are not editable (grayed out). The preview is based on the reusable template.

Product information image

For this campaign only
 Reusable template

Autumn highlights

Frosty Fall Fashions

Autumn highlights

Show advanced settings

Note: Selecting a reusable template from the drop-down list overwrite the field values, so if you want to return the current settings, save them to a named template *before* selecting a reusable template.

Also, if you select a reusable template, then click **For this campaign only**, you can edit the values, which then becomes a new template that is unique to the current campaign; saving the campaign does not affect the previously selected reusable template. You can, however, create another reusable template by basing it on an existing named template. Saving the campaign does not change the reusable template.

To edit a reusable template, go to **Configuration > Email Product Recommendations > Reusable templates**. See [Editing an email template](#).

3. To assign the selected template to the campaign, click **Save campaign**.

Previewing a product

You can enter or select a product in the **Select product** field. You can use the refCode or description to search. Selecting a product fills in other input boxes of the preview (**Product title**, **Product price**, and **Custom attributes**); you can select other values (such as *material*). The preview image shows how it will look when the product is recommended.

Preview

Select product	<input type="text" value="Enter or search for a product"/>	<div style="background-color: #e69d00; color: white; padding: 10px; border: 1px solid #ccc;"> <p>Blue Birdseye English Suit Waistcoat £100.00</p> </div>
Product title	<input type="text" value="Blue Birdseye English Suit Waistcoat"/>	
Product price	<input type="text" value="100"/>	
Custom attributes		
brand	<input type="text" value="cette dublin"/>	
discount_bool	<input type="text"/>	
l1cat	<input type="text" value="waistcoats"/>	
magentoproductid	<input type="text" value="22"/>	
material	<input type="text" value="wool"/>	
pricerange	<input type="text" value="cheap"/>	
size	<input type="text"/>	
term	<input type="text" value="suit"/>	

Each recommendation is composed of two images:
1. The image of the recommended product.
2. The image of all the text that accompanies the recommended product, i.e. the product title, the product price, a discount and so on.

This page allows you to define the style of the accompanying text. Click **Show advanced settings** to show the HTML/CSS code. In this advanced mode you will be able to edit the HTML/CSS to style the accompanying product text. The preview pane reflects your changes, so feel free to play around with the available options before saving.

Creating a product set

You can group products that you want to promote or sell, and you can use product sets in expressions. To create a product set:

1. Select the **Product sets** tab.
2. Click **Create a product set**.
3. Enter a name for the product set, such as *Holiday Sale*.
4. Add products to a set in the following ways:
 - Enter the refCode, or the whole or partial name (such as *jacket*) of a product in the **Products** field. A list of results appear. Click a product (like *Denim Jacket*) to add it; hover on it to see the product description.

- Enter space in the **Products** field and available products appear for you to select by clicking each product.

Manage your product sets Create a product set

Create a product set

Name

Products ×

Enter or search for each product

[Clear all](#)

or















Upload a CSV file

[Cancel](#) Save product set

- Drag and drop a CSV file (or click and select the file) in the **Upload a CSV file** space.

Note: A product set can contain up to 200 products.

5. Click **Save product set**. Your new product set appears in the list, where you can edit, delete, and copy the sets.

<input type="text" value="Search"/>			
Name ▾	Image ⇅	Products ⇅	Edit - Delete - Copy
Holiday sale		P-27312186, P-42340084, P-44648724, Cargo-svart_1, P-40835688	  
Matching outfit		3434-12345, Lowepro-Nova-Sport-Red_1, P-35614412	  
Testa	No photo	P-40707729, P-36063043, P-39101253, Sandisk-Extreme-Pro_1, P-39813617, P-36127195, Lowepro-Nova-Sport-Grey_1, P-42313640, P-31957691	  
Tunics	No photo	3434-12345, Tops-Tunics-LongSleeve	  

Exporting and importing Email Product Recommendations campaigns

This topic describes how to export and import Email Product Recommendations campaigns with a CSV file.

If you have campaigns built across different markets and locales and you want to make a change affecting all or some of your active campaigns, you can create a master CSV file that contains the configuration of all your active campaigns. You can edit and import changes into the for the Personalization Portal.



Note: You should first export campaigns to keep the proper format, then make changes and import the updated file. Do not prepare CSV files on your own.

Exporting Email Product Recommendations campaigns

1. From the **Email Product Recommendations > Campaigns** view, click **Export campaigns**. The **Exporting campaigns** dialog box appears.

Exporting campaigns ×

Download a CSV file containing the configuration for all Mail campaigns for the selected locales.

Select all

Client site ▼	Locale
datademosite1	<input checked="" type="checkbox"/> en-gb
epi-serverdemo	<input checked="" type="checkbox"/> en <input checked="" type="checkbox"/> en-gb <input type="checkbox"/> sv <input type="checkbox"/> no
epi-servertest1	<input type="checkbox"/> en <input type="checkbox"/> sv
euromonitor-demo	<input type="checkbox"/> en <input type="checkbox"/> sv <input type="checkbox"/> fr
sales_uk	<input checked="" type="checkbox"/> en <input type="checkbox"/> sv
wine-society-demo	

Export campaigns Cancel

2. Enable **Select all** to download every client in all locales, or enable just the Client site and Locales you want to export to a CSV file.
3. Click **Export campaigns** to create the CSV file.

Note: CSV reports from the Personalization Portal are localized (number formatting and CSV separator) according to your language setting. For example, English CSV files will have a comma (,) separator and a period (.) decimal point (such as Sep 2021, 11.49); German CSV files will have a semicolon (;) separator and a comma (,) decimal separator (such as Sep 2021; 11,49).

Making changes to the CSV file

You can open the CSV file in Microsoft Excel.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	SiteName	Campaign	Campaign	NumberO	Locale	TrackingC	DontRepe	UseTopup	PreviewE	PreviewE	PreviewTi	RecPositi	Strategies	StrategyH	StrategyE	FallbackPr	RecProdu	RecInfolm	RecProductPageUR
2	mySite	10001	Order Dis	4	en-gb	-	-	0	Yes	Optivo	{recipient_triggerFil	1	1: Best sel	(r.brand-sp.brand)	https://m	https://m	https://mySite-em		
3	mySite	10001	-	-	-	-	-	-	-	-	-	2	1: Best sel	(r.brand-sp.brand)	https://m	https://m	https://mySite-em		
4	mySite	10001	-	-	-	-	-	-	-	-	-	3	1: Best tre	(r.brand-sp.brand)	https://m	https://m	https://mySite-em		
5	mySite	10001	-	-	-	-	-	-	-	-	-	4	1: Co-purc	(r.brand-sp.brand)	https://m	https://m	https://mySite-em		
6	mySite	10002	Easter pro	4	en-gb	&utm_sou	-	0	Yes	Episerver	{bmThirdf {external	1	1: Abandoned baske	r.attribute="value"	https://m	https://m	https://mySite-em		
7	mySite	10002	-	-	-	-	-	-	-	-	-	2	1: Popular products f	r.attribute="value"	https://m	https://m	https://mySite-em		
8	mySite	10002	-	-	-	-	-	-	-	-	-	3	1: New products (las	r.attribute="value"	https://m	https://m	https://mySite-em		
9	mySite	10002	-	-	-	-	-	-	-	-	-	4	1: New products from	purchased categori	https://m	https://m	https://mySite-em		
10	mySite	10003	Order Cor	5	en-gb	-	-	0	Yes	Episerver	{bmThirdf {external	1	1: Popular co-purcha	r.attribute="value"	https://m	https://m	https://mySite-em		
11	mySite	10003	-	-	-	-	-	-	-	-	-	2	1: Co-purchased proi	r.attribute="value"	https://m	https://m	https://mySite-em		
12	mySite	10003	-	-	-	-	-	-	-	-	-	3	1: Popular products f	r.attribute="value"	https://m	https://m	https://mySite-em		
13	mySite	10003	-	-	-	-	-	-	-	-	-	4	1: Recommendation	r.attribute="value"	https://m	https://m	https://mySite-em		
14	mySite	10003	-	-	-	-	-	-	-	-	-	5	1: Popular products f	r.attribute="value"	https://m	https://m	https://mySite-em		
15	mySite	10004	TEST1/TES	2	en-gb	-	-	0	Yes	Episerver	{bmThirdf {external	1	1: Best sellers by revenue	(last 30 days)	https://m	https://m	https://mySite-em		
16	mySite	10004	-	-	-	-	-	-	-	-	-	2	1: Best sellers by units	(last 7 days)	https://m	https://m	https://mySite-em		
17	mySite	10005	TEST2/TES	3	-	-	-	0	Yes	Episerver	{bmThirdf {external	1	1: Best sellers by conversion	(last 90 days)	https://m	https://m	https://mySite-em		
18	mySite	10005	-	-	-	-	-	-	-	-	-	2	1: Best sellers by revenue	(last 30 days)	https://m	https://m	https://mySite-em		
19	mySite	10005	-	-	-	-	-	-	-	-	-	3	1: Best trending	(last 30 days)	https://m	https://m	https://mySite-em		
20																			
21																			

Within the CSV file, for the columns before **RecPosition** (column L), a hyphen represents duplicated values. For example, in the previous image, the value in cells C3, C4, and C5 (-) are duplicates of the value in cell C2 (*Order Dispatch*). If you change the value in C2, then C3, C4, and C5 inherit the changed value also.

You can make changes only to the following fields (Column ID added):

- C. CampaignName
- F. TrackingCode
- G. DontRepeatRecsForDays
- H. UseTopups
- I. PreviewESP
- J. PreviewEmailVariable
- K. PreviewTriggerId
- M. Strategies
- N. StrategyHints
- O. StrategyExpression
- P. FallbackProductSet

Note: Do not add new campaigns to the CSV file. If you add new campaigns to the CSV file, you will receive an error message and the CSV file will not be imported. To add a new campaign, copy or create a new one in the Personalization Portal before exporting the CSV file.

Importing Email Product Recommendations campaigns

Note: The updated fields in the imported campaign configuration in the CSV file overwrite their respective fields in the existing campaign configurations for the specified client sites and locales in the CSV file.

After you modify the exported CSV file, import the file as follows.

1. From the **Email Product Recommendations > Campaigns** view, click **Import campaigns**. The **Importing campaigns** dialog box appears.

Importing campaigns

Upload a CSV file containing the configuration of your Mail campaigns.

Only changes to the following fields in the CSV file will be accepted:
CampaignName, TrackingCode, DontRepeatRecsForDays, UseTopups, PreviewESP, PreviewEmailVariable, PreviewTriggerId, Strategies, StrategyHints, StrategyExpression, FallbackProductSet.

Note: Do not add new campaigns to the CSV file: If new campaigns are added to the CSV file they will be ignored. To add a new campaign, copy or create a new one in the Personalization Portal before exporting the CSV file.

File name

Browse

Import CSV file Cancel

2. Click **Browse**, then select a CSV file that contains your campaign configurations.
3. Click **Import CSV file**.

Triggered Messages

Note: Triggered Messages are part of the [Optimizely Digital Experience Platform](#). It requires a specific installation and license. Triggered Messages works with [Email Product Recommendations](#) and Optimizely Campaign only. The Optimizely Digital Experience Platform contains many features to support you in your daily work. Depending on how your solution is set up, some features described in this documentation may not be available to you. Contact your system administrator to find out more. See [Optimizely World](#) for technical information.

You can send automated personalized emails via an Email Service Provider (ESP) that are triggered by the on-site actions of the email recipient. These emails typically alert the user of a price reduction or some form of abandonment. Because Optimizely captures user behavior, you also can use this behavior to include alternative recommendations to abandoned or browsed products.

You have the following preset triggers available:

- **Abandoned checkout**
- **Abandoned basket**
- **Abandoned browse**
- **Targeted discounts**
- **High product interest**
- **Post purchase**
- **Low-in-stock abandoned-basket.**

See the [In-session and daily triggers](#) section for a list of available triggers and their descriptions. New options are frequently added, so contact your Optimizely Customer Success Manager about what is available and for any specific requirements you may have.

To enable Triggered Messages functionality, set up the configuration in the Optimizely for the Personalization Portal so that Optimizely and the ESP platform can communicate with each other to send the right message at the right time; see [Setting up an ESP connection](#).

Note: The configuration is different for each Email Service Provider. Optimizely Triggered Messages can work with any ESP, so you can migrate Triggered Messages and Email Recommendations to any provider that you might select.

By using Triggered Messages alone, you can add users automatically to an email list or group and further refine the recipient list using automation programs available in your ESP account, or you can trigger an email to be sent out by your ESP right away. When combined with Email Recommendations, you have the power to include specific products that are of interest to the user—their browsed and abandoned products and recommendations based on their on-site behavior.

In-session and daily triggers

Triggered Messages distinguishes between In-session triggers and Daily triggers. In-session triggers fire during a visitor's session when a certain criteria is met. Daily triggers fire based on a daily analysis of visitor's behavior, for example when the visitor made a purchase.

In-session and daily triggers filter out products that are inactive, out-of-stock, and not recommendable. For example, an **abandoned basket** trigger will not fire when products in user basket are out-of-stock. Also, when a basket contains one in-stock product and one out-of-stock product, the trigger fires with only one product.

In-session triggers

In-session trigger campaigns analyze user behavior constantly (real-time) and fire actions immediately when trigger criteria are met. Each in-session trigger has

a wait time, which specifies how much time the visitor must be inactive for before the trigger can fire.

In-session triggers	Description
Abandoned checkout	Fires when a visitor enters the checkout flow but does not complete the purchase.
Abandoned basket	Fires when a visitor adds an item to the basket but does not purchase it.
Abandoned browse	Fires when a visitor visits a product page on the site but leaves the site without adding anything to the basket.
Additional trigger actions	Fires when a visitor navigates to a specific page (home, category, product, basket, order confirmation, or page URL that contains a specific phrase) a chosen number of times. For example, a visitor visits a particular section of the site and views more than 5 pages in a category but does not purchase. Use alone or combine it with another in-session trigger.

Daily triggers

The following table shows the daily triggers.

Daily triggers	Description
Targeted discounts	<p>Fires when a product the visitor has viewed but not purchased in the past 30 days has decreased in price.</p> <ul style="list-style-type: none"> Analysis runs as soon as the product feed is imported. Can be combined with an Email Product Recommendations campaign to show the discounted products in the email sent. When Only abandoned baskets is enabled, the trigger fires for products that were added to baskets and not purchased within the past 30 days.

Daily triggers	Description
High product interest	<p>Fires when a visitor has visited the same product multiple times without purchasing it in the last 30 days.</p> <ul style="list-style-type: none"> • It counts how many unique days the product page was viewed in the last 30 days. • Duration of each view is not considered. • Analysis runs at 09:00 UTC time by default, but you can configure this in the for the Personalization Portal. • Can be combined with an Email Product Recommendations campaign to show the viewed products in the email sent.
Post-purchase	<p>Fires a specified number of days after an order is placed.</p> <ul style="list-style-type: none"> • Analysis runs at 09:00 UTC time by default, but you can configure this in the for the Personalization Portal. • Can be combined with an Email Product Recommendations campaign to show the purchased products in the email sent.
Low-in-stock abandoned-basket	<p>Fires when a product is low in stock and the visitor added that product to their basket in the last 14 days, but did not purchase.</p> <ul style="list-style-type: none"> • Analysis runs as soon as the product feed is imported. • The trigger looks at product's variant stock level if variants are tracked on basket pages. If variants are not tracked, the trigger looks at product stock level. • The basket is considered abandoned after 4 hours of inactivity. • Upper and lower thresholds of stock availability need to be specified. Lower and upper bounds are both inclusive. • Can be combined with an Email Product Recommendations campaign to show the relevant products in the email sent.
Repurchase	<p>Fires when a visitor has not purchased a recurring product that was expected to be purchased by a given date, such</p>

Daily triggers	Description
	<p>as when paper supplies run out.</p> <ul style="list-style-type: none"> • Analysis runs at 09:00 UTC time by default, but you can configure this in the for the Personalization Portal. • Can be combined with an Email Product Recommendations campaign to show the purchased products in the email sent.

Trigger action limits

To avoid sending too many emails to a visitor, Triggered Messages implements limits for the number of emails that you can send.

Per-session limit

- You can fire only one send-message action for a session. You cannot remove this limit.

Per-campaign limit

- The limit applies only to send-message actions.
- The limit can be configured in a Triggered Messages campaign edit form under **Contact frequency**.
- The limit defined the following options:
 - **Per day.** 24 hours from the time a campaign is supposed to fire (not calendar day, from midnight to midnight).
 - **Per week.** 7 days from the time a campaign is supposed to fire.
 - **Per month.** 30 days from the time a campaign is supposed to fire.

For example, if the limit is 1 per day and a campaign fired for a visitor at 2 PM, the same campaign can fire no sooner than at 2:01 PM the next day for the same visitor.

- The following default limits apply when not configured: 5 per day, 20 per week, 50 per month.

Per-site limit

- The limit applies only to send-message actions. It doesn't apply to add-to-group and remove-from-group actions.
- The limit can be configured per site on Triggered Messages campaign list page.
- The limit defined the following options:
 - **Per day.** 24 hours from the time a campaign is supposed to fire (not calendar day).
 - **Per week.** 7 days from the time a campaign is supposed to fire.
 - **Per month.** 30 days from the time a campaign is supposed to fire.

For example, if the limit is 1 per day and any campaign fired for a visitor at 2 PM, any other campaign can fire no sooner than at 2.01 PM the next day for the same visitor.

- The following default limits apply when not configured: 5 per day, 20 per week, 50 per month.

Filtering triggers with expressions

Expressions filter products that do not match the expression. For an example **abandoned basket** campaign, if an abandoned basket contains two products, one that match the expression and one that does not, the campaign still fires for this basket with a single product.

You can define additional expressions for in-session and daily triggers. Expressions specify which products should fire the trigger campaign. For example, if an expression is defined as *(r.saleprice["GBP"]>"40")*, only products that are more expensive than 40 pounds fire the campaign.

You can reference products that caused a campaign trigger to fire in an Email Product Recommendations campaign through strategies. That is, *Products from in-session trigger campaign* returns products that fired the campaign and *Recom-*

recommendations based on daily trigger campaign returns recommendations that are related to the product that fired the trigger campaign.

For further information on expressions, see [Creating a new Triggered Messages campaign](#).

Prioritizing campaigns

Note: Priorities apply only to situations where campaigns should fire at the same time. Lower priority campaigns with a shorter time to wait do not wait with firing for high priority campaigns with a longer time to wait.

You can prioritize triggered messages campaigns on the campaign list page in the Personalization Portal by dragging campaigns up or down on the list with the icon next to campaign name (first column on the list).

If two or more campaigns are supposed to fire at the exactly same time, the higher priority campaign fires first. Trigger action limits may prevent subsequent campaigns from firing.

For a sample scenario on prioritization of Triggered Messages campaigns, see [Example of trigger priorities](#).

Setting up a Triggered Messages campaign

Each Triggered Messages campaign must have an associated [Email Service Provider \(ESP\) connection](#) and [ESP action](#) (send mail, add to group, remove from group). Set up the ESP connection and the ESP action once, and these can act on all of your Triggered Messages campaigns. Furthermore, each Triggered Messages campaign must have an associated Email Product Recommendations campaign that uses an appropriate trigger strategy. See [Setting up a triggered Email Product Recommendations campaign](#).

Creating a new Triggered Messages campaign

Go to **Triggered Messages** in your for the Personalization Portal account. To create a new Triggered Messages campaign, click **Create a new campaign** and fill out the form as follows:

1. Enter a name for your Triggered Messages campaign, such as *Test SendMessage*.
2. Select an **ESP action** so that the trigger performs the desired action when it fires.
3. Optionally, specify start and end dates for the campaign.
4. If you have a site in Optimizely with more than one language, such as a Swiss site that has French and German languages, you can set the **Locale** to fire triggered messages based on the locale, which sends emails in the correct language.
5. **Contact frequency** appears only if you select the **Send Mail** ESP action. Set it to **On** if you want the campaign to limit the number of times a trigger can fire for each customer from this Triggered Messages campaign.

If you turn on the **Contact frequency**, specify the maximum number of times that the trigger can be fired for each user by this campaign per day, per week, or per month.

In the screen image, the new trigger campaign specifies that for any visitor, the trigger fires no more than 5 times per day, and no more than 20 times per week, and no more than 50 times per month (whichever limit is reached first).

Configure your campaign ?

Campaign name:

ESP action:

Start date:

End date:

Locale:

Contact frequency: On

per day per week per month

6. Under **Strategies**, select the type of trigger this campaign should use:
 - For **In-session triggers**, specify how long (in minutes) the visitor needs to be inactive on your site before the trigger can fire. Select a waiting time between 0 and 240 minutes.
 - Unless stated otherwise, **Daily triggers** monitor the last 30 days of data. As soon as the trigger criteria are satisfied, the trigger fires. The following Repurchase strategy sends an email when a visitor has not purchased a recurring product that was expected to be purchased by a given date, such as when paper supplies run out.

The screenshot shows the 'Strategies' configuration page. At the top, there are radio buttons for 'Session' and 'Daily', with 'Daily' selected. To the right, 'Scheduled time' is set to '11:00' and the location is 'Europe/London'. Below this, the 'Daily triggers' section lists several options: 'Targeted discounts (last 30 days)', 'High product interest (last 30 days)' (with a 'Viewings' input field), 'Post purchase' (with a 'Days since order' input field), and 'Low-in-stock abandoned-basket' (with 'Stock upper threshold' and 'Stock lower threshold' input fields). The 'Repurchase' option is selected and highlighted in a light blue background.

- You can use **Additional trigger actions** alone or in combination with an **In-session trigger**. See **Trigger action limits**.
 - You can specify whether the customer must have visited a certain page type a specified number of times.
 - You can specify a URL (or a keyword from a URL) from your site that the customer must have visited.

Note: The order of additional trigger actions does not matter.

Note: To add a criterion, where the user must have NOT visited a certain page type or URL, you can enter the number of viewings as 0 (zero).

Strategies ▾

Session Daily How many minutes to wait

In-session triggers

Abandoned checkout

Abandoned basket

Abandoned browse

Additional trigger actions

<input checked="" type="checkbox"/> Home page	Viewings <input type="text" value="5"/>
<input checked="" type="checkbox"/> Category page	Viewings <input type="text" value="3"/>
<input checked="" type="checkbox"/> Product page	Viewings <input type="text" value="3"/>
<input checked="" type="checkbox"/> Basket page	Viewings <input type="text" value="2"/>
<input checked="" type="checkbox"/> Order page	Viewings <input type="text" value="1"/>
<input type="checkbox"/> Specific page	Viewings <input type="text"/>

7. Optionally, add any **Expressions** you want. Expressions let you further refine the criteria of a trigger, for example to fire only for special products, product categories or brands.

Expressions ▾

Age group ▾ equals to ▾ junior x

x +

▾

- Expressions only apply for the trigger **Strategies** (In-session trigger and Daily trigger), not for **Additional trigger actions**.
- A trigger fires only with products that match the **Expressions** filter. The following rules apply:
 - If none of the products for the trigger (for example an In-session trigger for abandoned basket products) match the expression, the trigger will not fire.
 - If only some products for the trigger (for example an In-session trigger for abandoned basket products) match the expression, the trigger will fire with only matching products.

Tip: You may have products whose prices change very frequently. To avoid sending a discount email every time a price reduction occurs for these products, you can use **Expressions** to limit the trigger requirements to selected products.

8. Click **Save campaign** when you have completed your specifications.
9. The initial state of a newly created trigger is **OFF**. To activate it, go to the **Campaigns** overview page and click the play button ► next to the campaign name.

Setting up an ESP connection

Optimizely must connect to the ESP's API so that when Triggered Messages is fired, Optimizely can alert the ESP to perform an action.

1. Go to **Configuration > Triggered Messages** in your for the Personalization Portal account.
2. Select **ESP connections**.
3. Edit an existing connection or create a new one. To create a new connection, click **Create an ESP connection**. The **Manage your ESP connections** screen appears.

Manage your ESP connections [+ Create an ESP connection](#)

Connection name Name of ESP Status

Recipient list authorization code

[🔗 Test ESP connection](#)

[✔ Save ESP connection](#) [Cancel](#)

ESP connection name	Email service provider	ESP username	ESP realm	Edit - Delete - Status
Connection	Episerver Campaign			✎ 🗑 <input type="checkbox" value="On"/>
Episerver Push	Episerver Campaign			✎ 🗑 <input type="checkbox" value="On"/>

4. To create a connection:
 - a. Enter your API credentials for your ESP account (such as username, password, database, realm, API token).
 - b. Click **Test ESP connection** to test the connection.
 - c. Click **Save ESP connection**.

Setting up an ESP action

1. Go to **Configuration > Triggered Messages** in your for the Personalization Portal account and open a new or existing campaign.
2. Select **ESP actions**. You can either edit an existing ESP action or create a new one. Make sure it uses the connection that you require, for example, the one you created or edited in [Setting up an ESP connection](#).
3. To create a new action, click **Create an ESP action**.
4. Choose your preferred **ESP action type** from the available options and enter the required details (such as **Group ID**, **List ID**, **Message ID**, **Database**); the values of which are available from your ESP portal.

Note: These fields are dynamic and differ depending on the chosen **ESP connection** and the chosen **ESP action type**.

Manage your ESP actions + Create an ESP action

ESP action name

ESP action type

Remove user from target group

Add user to target group

Send message to user

ESP connection

Mailing ID

Test ESP action

Save ESP action Cancel

ESP action name	ESP connection name	ESP action type	Edit - Delete
Episerver send Push	Episerver Push	Send message	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Send mail	Connection	Send message	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Available action types are as follows:

Note: Depending on the features supported by your ESP platform, some of these actions may not be available for your chosen connection.

- **Remove user from target group.** Removes a user's email address from the group or list.
- **Add user to target group.** A fired trigger tells the ESP to add a user's email address to the email group or list with the specified **Group ID** or **List ID**. If there are ESP-level triggers on the list, are be activated by this step. This action just adds a user's email addresses to a list; it does not send those users any emails.

- **Send message to user.** A fired trigger tells the ESP to send the message with the specified **Message ID** to the user.

Warning: Depending on your ESP, **Send message** may not check whether the user has opted in to the emailing scheme, so use it with caution.

5. After you created your ESP action, test it and save it.

Linking to a specific basket





Optimizely can integrate links from an email recommendation to a particular basket of the recipient. To enable this feature, contact customer service.

For developer information, see [Link to a specific basket](#) on Optimizely World.

Managing Triggered Messages campaigns

Go to **Triggers** in your for the Personalization Portal account and select the **Campaigns** tab.

This page lets you do the following:

- **Edit.** Click **Edit**  or on a Triggered Messages campaign name to open the configuration page for that campaign so you can edit it.
- **Status.** Click **Activate it**  to switch on a campaign or **Pause it**  to switch off a campaign. The initial state of a newly created Triggered Messages is paused.
- **Delete.** Click **Delete**  to delete a campaign. A confirmation box appears.

Prioritizing trigger campaigns

On the **Campaigns** page, you can sort your Triggered Messages campaigns in the order you want for them to be fired. Campaigns at the top of the table have the highest priority, and those at the bottom the lowest.


Trigger prioritization occurs whenever two or more triggers criteria are met at the same time. The following rules apply:

- The trigger that is to fire first is prioritized.
- If campaigns are to fire at the same time, the campaign that is higher up in the table is prioritized.

The priority order is especially important if you restrict the number of times a trigger can fire for any one customer (by defining a global contact frequency).

















After a campaign’s trigger fires, only the trigger from a trigger campaign higher up in the table can fire that day (if it does not exceed the **Global contact frequency**). So, in the table of trigger campaigns in the for the Personalization Portal, if one of the triggers fires, any trigger below it in the list is prevented from firing that day (resets at 00:00 UK time).

Note: Daily triggers are analyzed once a day, and the same daily trigger can fire more than once. For in-session triggers, only one in-session trigger is allowed per session.

To re-order the priority of your trigger campaigns click the button  to the left of a campaign’s name in the **Priority** column, and drag the campaign to the desired position in the table.

Manage your campaigns [Create a new campaign](#)

Search Global contact frequency Off

Priority	Campaign name	ESP action name	Time to wait	Monitoring period	Contact frequency	Edit - Status - Delete
 1	Abandoned browse	Send mail	1 minutes	in session	Off	  
 2	Abandoned basket	Send mail	1 minutes	in session	Off	  
 3	Episerver Mobile Push Trigger	Episerver send Push	1 minutes	in session	Off	  
 4	New cart	Send mail	daily	30 days	Off	  

Example of trigger priorities

Within one session, a visitor fulfilled the criteria of all five campaigns in the picture below.

The **Abandoned basket** campaign (position 2) fires first. Although it shares the shortest **Time to wait** with **Optimizely Mobile Push Trigger** (position 3), it has a higher position in the table and therefore a higher priority. **Abandoned Browse** is on top of the table, but with a waiting time of 45 minutes it has a lower priority.

Manage your campaigns [Create a new campaign](#)

Search Global contact frequency 2 per day 14 per week 42 per month

Priority	Campaign name	ESP action name	Time to wait	Monitoring period	Contact frequency	Edit - Status - Delete
1	Abandoned browse	Send mail	45 minutes	in session	5 per day 10 per week 20 per month	
2	Abandoned basket	Send mail	30 minutes	in session	Off	
3	Episerver Mobile Push Trigger	Episerver send Push	30 minutes	in session	1 per day 5 per week 50 per month	
4	New cart	Send mail	daily	30 days	Off	

After the **Abandoned basket** trigger fired, another In-session trigger cannot be fired as only one in-session trigger is allowed per session.

When the visitor starts a new session, only **Abandoned browse** (position 1) qualifies to fire, as now only triggers with a higher position in the table than **Abandoned basket** are considered.

If the visitor starts a third session, no further in-session trigger can be fired, because the trigger with the highest position in the table has already been fired and the daily **Global contact frequency** in this example is limited to 2.

Note: If at the set time of a daily trigger an in-session trigger is to fire, the trigger with the higher position in the table wins.

Setting up a triggered Email Recommendations campaign

You can create a campaign for Email Product Recommendations to return abandoned or personalized product recommendations in the email template that is sent to users for whom a trigger was fired. For information about creating an Email Product Recommendations campaign, see Email Product Recommendations.

Setting up a triggered Email Product Recommendations campaign

In the Optimizely for the Personalization Portal, select **Email Product Recommendations**, click **Create a new campaign**, and follow the steps.

1. **Style editor.** Create the styling for the product information image of the abandoned or recommended products that will be displayed in the email.
2. **Configuration.** Select how many products you want to appear in the email campaign, specify localization settings, add third-party tracking code, and configure recommendation strategies. You have the following trigger-specific Email Recommendations strategies available:
 - **Products from daily trigger campaigns.** Returns the products from your daily trigger campaign, such as Targeted discounts, High product interest, Post purchase, Low-in-stock Abandoned-basket.
 - **Products from in-session trigger campaigns.** Returns the abandoned products from your in-session trigger campaign, such as Abandoned basket, Abandoned browse, Abandoned checkout.
 - **Recommendations based on daily trigger campaigns.** Returns related products based on the trigger used, such as Targeted discounts, High product interest, Post purchase, Low-in-stock Abandoned-basket.
 - **Recommendations based on in-session trigger campaigns.** Returns related products based on the trigger used, such as Abandoned basket,

browse or checkout, for the current session.

Configure your campaign Create a new campaign

Style editor > Configuration > HTML and preview ?

Widget setup **Tracking**

Number of products Please insert here any tracking code you want to be added in the product link URL.

Locale Tracking code

No repeat (in days) Use top-ups?

Product 1 Duplicate x

Strategy Expression Hints ⓘ

Please click here to select

- Products from daily trigger campaigns
- Products from in-session trigger campaigns
- Recently purchased products
- Recently viewed products
- Recommendations based on abandoned basket
- Recommendations based on daily trigger

Search product set

Product 2 Duplicate x

Strategy Expression Hints ⓘ

Please click here to select

Fallback product set

Search product set

- HTML and preview.** Generate the code to copy and insert into your email template later, and preview the output of your Email Product Recommendations campaign. Select the correct ESP in the **Email service provider** drop-down list, so that the correct placeholders are automatically populated in the variables fields. Click **Generate code**. You must insert the generated HTML code into the email template in your ESP account.

Style editor > Configuration > HTML and preview

Generate HTML code

Email service provider: Episerver Campaign

Variables

Email address: {recipientid}


Trigger fire ID: {externaltriggerid}

```
{externaltriggerid} ></a>  
  
<!-- Product information link and image for recommendation #2 -->  
<a href="https://partnerdemo.peerius.com/tracker/er/link.page?e={recipientid}&site=episerverdemo&wid=78301&rno=1&triggerFireId={externaltriggerid}"></a>  
<!-- RECOMMENDATION #3 -->  
<!-- Recommendation link and image for recommendation #3 -->  
<a href="https://partnerdemo.peerius.com/tracker/er/link.page?e={recipientid}&site=episerverdemo&wid=78301&rno=2&triggerFireId={externaltriggerid}"></a>  
  
<!-- Product information link and image for recommendation #3 -->  
<a href="https://partnerdemo.peerius.com/tracker/er/link.page?e={recipientid}&site=episerverdemo&wid=78301&rno=2&triggerFireId={externaltriggerid}"></a>
```


Preview or send a test email

joe.sample@example.com

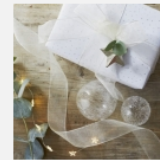
Hello,
This is an example of what the Episerver recommendations widget will look like in an email.



Valencia Bed Linen Collection
£ 15.00



Savoy Bed Linen Collection
£ 25.00

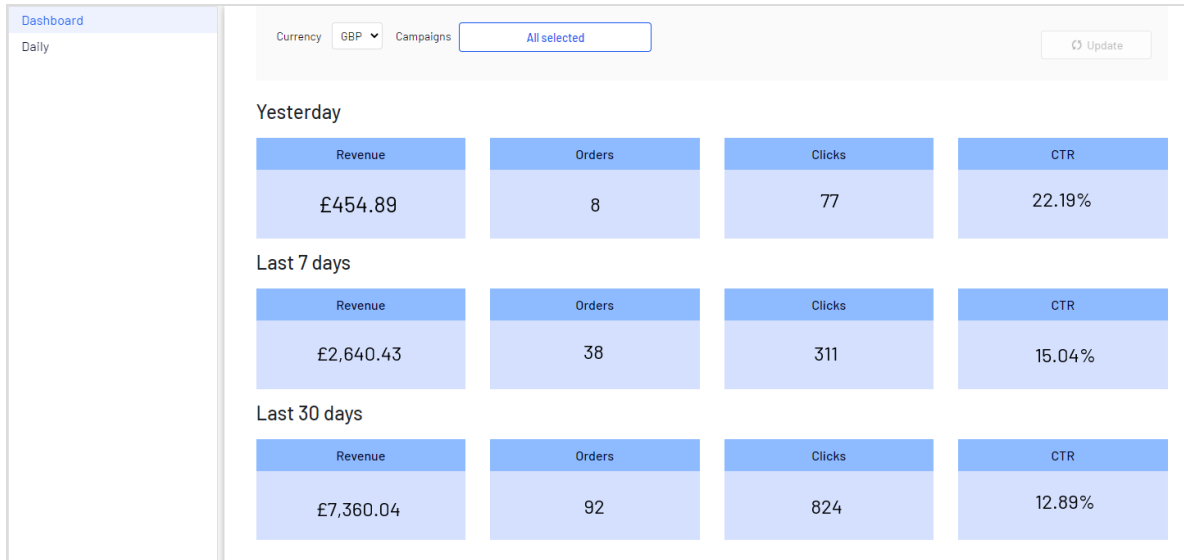


Wired Gold Ribbon - 5m
£ 6.00

[Detailed information](#)

Triggered messages reports in Optimizely

In the Reports section in the for the Personalization Portal, a Triggers dashboard shows the revenue, orders, clicks, and click-through-rate for your Triggered Messages campaigns.



Also, there is a daily report that shows how many website sessions fired a trigger, how many triggered emails were viewed, and how many products were purchased through a Optimizely-generated link from those emails. This is reported for each trigger and broken down to daily reporting.

The daily report table provides a detailed view of triggered messages performance. It includes filters for Time range (Week, Month, 3 Months, May 29, 2020 - Jun 05, 2020) and Currency (GBP), along with an Export CSV button and an Update button. The table lists various triggers and their performance metrics.

Name	Date	Fired	Impressions	Clicks	Orders	Revenue
Total:		11351	6,460	836	92	£7,244.99
↓ Abandoned basket	-	2397	1,286	180	25	£1,793.45
↓ Abandoned browse	-	7277	4,126	508	31	£2,303.96
↓ Abandoned checkout	-	1677	1,048	148	36	£3,147.58
Total:		11351	6,460	836	92	£7,244.99

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Using Triggered Messages with Optimizely Campaign

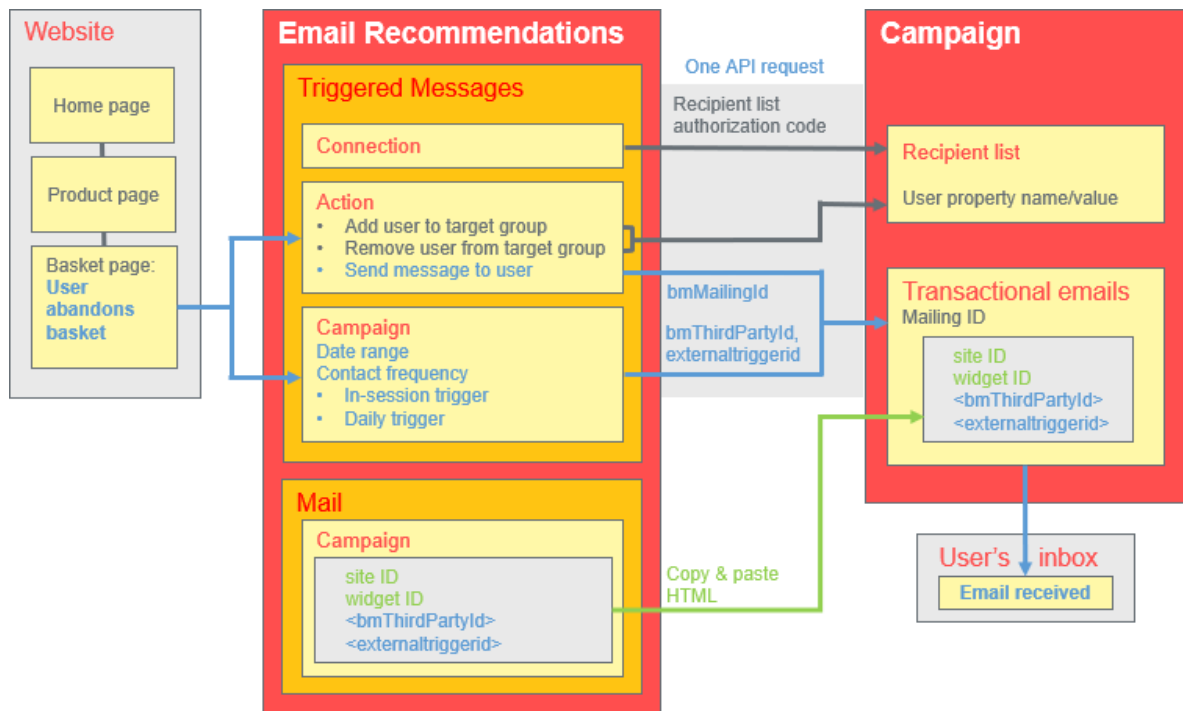
This topic describes how to connect Triggered Messages to Optimizely Campaign.

Note: To use Triggered Messages with Optimizely Campaign, your system administrator or developer must configure tracking first as described in the [technical documentation on Optimizely World](#). When tracking is configured, you can continue to set up Triggered Messages following the steps described here.

Sending triggered emails

You need to create a mailing campaign in Optimizely Campaign, and campaigns in both Triggered Messages and Email Product Recommendations. In Triggered Messages, you also need to create a connection to your recipient list in Optimizely Campaign and specify the appropriate action to take.

The following image shows the flow, through Triggered Messages and Optimizely Campaign, when users abandon their basket triggering an email to be sent to them directly.



To set up the Triggered Messages-to-Campaign integration, do the following.

- **Optimizely for the Personalization Portal > Triggers**, set up the following:
 - **ESP connection** to connect to the Optimizely Campaign HTTP API. Enter the **Recipient list authorization code**, which is a token giving authorization access to a particular recipient list. See [Retrieving the Recipient list authorization code](#) and also [Setting up an ESP connection](#).
 - **ESP action** to set up one of the following actions:
 - **Send Message to user.** Specify a **Mailing ID** for the email template in Optimizely Campaign. The previous chart shows this action being used. See [Creating a Send message to user action](#) and also [Setting up an ESP action](#).
 - **Add user to target group.** Specify a **User property name** and a **User property value**. See [Creating an Add user to target group action](#).
 - **Remove user from target group.** Specify a **User property name**. See [Creating a Remove user from target group action](#).

- [Setting up a Triggered Messages campaign](#) with a specific strategy, such as *Abandoned basket*.
- In **Optimizely Campaign**, you need the following:
 - **A Recipient list.**

Note: For compliance reasons, Triggered Messages can only send emails to users that already exist in the recipient list.

To add new users to the recipient list and make them available for Triggered Messages, you can use a Campaign API. For more information on Campaign's APIs, see [Optimizely Campaign's APIs and libraries](#).

Please note the legal requirements in the Opt-in topic in the Optimizely Campaign user guide regarding the advertising consent of the recipients.

- **A Transactional mail campaign.**
- Set up an associated transactional mail campaign in Optimizely Campaign by [copying the generated HTML code](#) from Email Product Recommendations and pasting it into the email template (with that **Mailing ID**) on the Optimizely Campaign portal. The HTML code contains placeholders that the ESP (that is, Optimizely Campaign) replaces with the actual values for each email sent.

When an Optimizely trigger fires, using the Optimizely Campaign HTTP API, Triggered Messages sends Optimizely Campaign the following for a **Send Message** action:

- **Recipient list authorization code.** A Recipient list authorization code creates a connection between Optimizely Campaign and the for the Personalization Portal, and adds the **triggerFireId** to a user's entry in the recipient list.
- **Mailing ID.** For **Send Message**, for that **Mailing ID**, Optimizely Campaign replaces the placeholders in the Email Product Recommendations template HTML code with the values sent in the API request.
- **triggerFireId.** Replaced with the ID of the Triggered Messages campaign sent in the API request.

- Either of the following:
 - **recipientid**. Replaced with the user's email address sent in the API request.
 - **bmThirdPartyId**. Replaced with the user's email address mapped from their pseudonymized user ID.

Retrieving the Recipient list authorization code

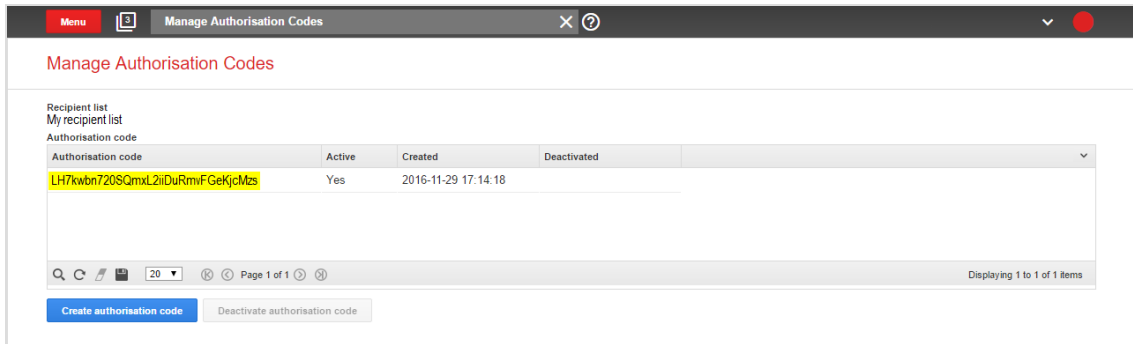
To retrieve the Recipient list authorization code:

1. Open the Optimizely Campaign menu and select **Administration > API Overview** in Optimizely Campaign.
2. Select **Recipient lists** to show its table.
3. Select your recipient list from the table.
4. Click **Manage authorization codes**.

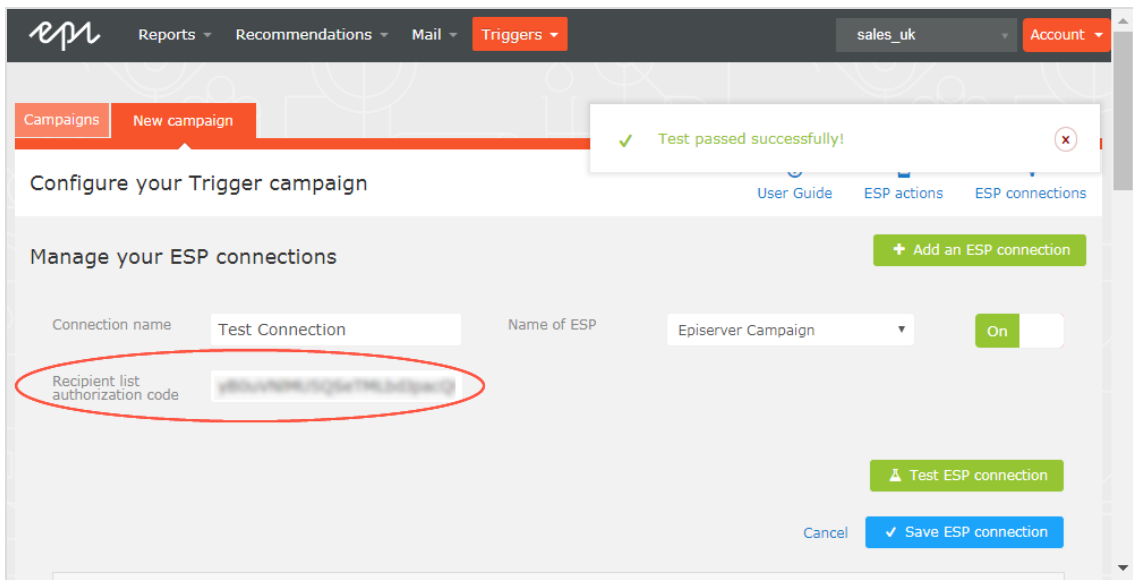
The screenshot shows the 'API Overview' page in the Optimizely Campaign interface. The 'Recipient lists' tab is selected, displaying a table of recipient lists. The table has columns for ID, Name, Description, Recipients, Media type, and Te. The row for 'My recipient list' (ID: 678901234567) is highlighted in yellow. Below the table, a yellow button labeled 'Manage authorisation codes' is visible.

ID	Name	Description	Recipients	Media type	Te
123456789012	My List		15	Email	No
234567890123	Print		0	Print	No
345678901234	SMS		0	SMS	No
456789012345	Fax		0	Fax	No
567890123456	My transaction list		15	Email	No
678901234567	My recipient list		8	Email	No

- From the **Manage Authorization Codes** view, copy the authorization code.



- Paste the authorization code into the Personalization Portal, on the **Triggers > New campaign > ESP connections** page.



- Enter the connection name.
- Select **Episerver Campaign** as the name of your ESP.
- Click **Test ESP connection**.
- If the connection was successful, click **Save ESP connection**.

Linking to a specific basket

Optimizely can integrate links from an email recommendation to a particular basket of the recipient. To enable this feature, contact customer service.

For developer information, see [Link to a specific basket](#) on Optimizely World.

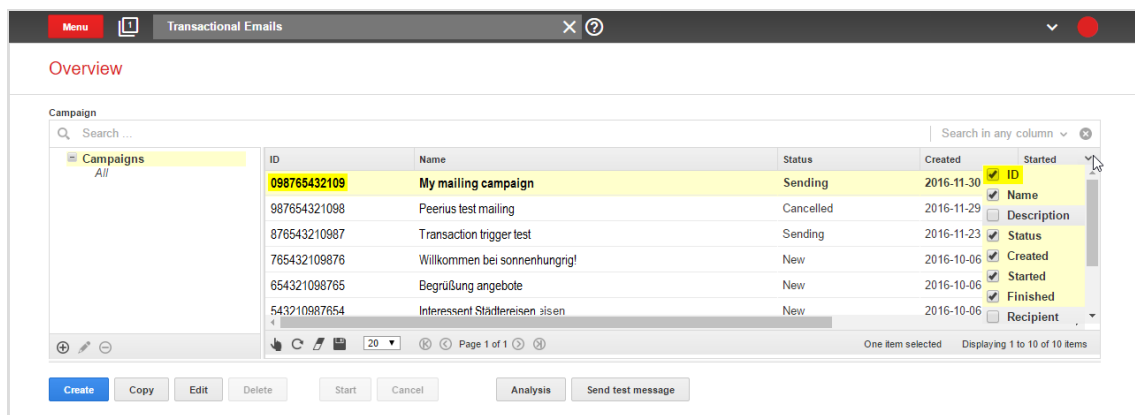
Creating an ESP action

See also [Setting up an ESP action](#).

Creating a Send message to user action

To send messages using Triggered Messages directly to users, you need to provide the **Mailing ID** of the Optimizely Campaign campaign on the Triggered Messages ESP action page. You can retrieve the **Mailing ID** by following these steps:

1. Open the Optimizely Campaign menu and select **Campaigns > TransactionalMails** in Optimizely Campaign.
2. Copy the **Mailing ID** for your campaign from the ID column.



3. In the Personalization Portal, go to **Configuration > Triggered Messages > ESP actions > selected action** and paste the **Mailing ID**.

The screenshot shows a form titled "Manage your ESP actions" with a "+ Create an ESP action" button in the top right. The form contains the following fields and options:

- ESP action name: Text input field containing "Send mail".
- ESP connection: Dropdown menu showing "Connection".
- ESP action type: Radio button options: "Remove user from target group", "Add user to target group", and "Send message to user" (which is selected and highlighted).
- Mailing ID: Text input field containing "123456789000".
- Test email: Text input field containing "you@domain.com" with a "Test ESP action" button next to it.
- Bottom right: "Save ESP action" button (with a checkmark) and "Cancel" button.

- a. **ESP action name.** Enter the action name.
 - b. **ESP connection.** Select the connection that you created earlier.
 - c. **ESP action type.** Select **Send message to user.**
 - d. **Mailing ID.** Enter the campaign Mailing ID.
 - e. **Test ESP action.** Enter the email address of the email recipient and click **Test ESP action.**
4. If the test is successful, click **Save ESP action.**

Creating an Add user to target group action

1. In the Personalization Portal, go to **Configuration > Triggered Messages > ESP actions > selected action.**

The screenshot shows a form titled "Manage your ESP actions" with a "+ Create an ESP action" button in the top right. The form contains the following fields and options:

- ESP action name: Text input field containing "Add user".
- ESP connection: Dropdown menu showing "Connection".
- ESP action type: Radio button options: "Remove user from target group", "Add user to target group" (which is selected and highlighted), and "Send message to user".
- User property name: Text input field containing "language".
- User property value: Text input field containing "en".
- Test email: Text input field containing "you@domain.com" with a "Test ESP action" button next to it.
- Bottom right: "Save ESP action" button (with a checkmark) and "Cancel" button.

- a. **ESP action name.** Enter the action name.
 - b. **ESP action type.** Select **Add user to target group**.
 - c. **ESP connection.** Select the connection that you created earlier.
 - d. **User property name.** The name of the user property in your recipient list that you want Triggered Messages to update. The name you specify must match exactly the *internal name* of the field in your recipient list.
 - e. **User property value.** The value of the user property given in the previous step. In this example, the User property name is *language* and the User property value is the language code of the user, (*en* in this case). The language code configures email campaigns that feed the products into the email with the correct currency for each language, and ensures the titles are displayed in the correct language and the prices are in the correct currency. For ambiguous language codes, such as English (which can have different currencies in the US and UK, for example), Optimizely Campaign performs an additional check on the user information to use the correct currency.
 - f. **Test ESP action.** Enter your email address of the user and click **Test ESP action**.
2. If the test is successful, click **Save ESP action**.

Create a Remove user from target group action

1. In the Personalization Portal, go to **Triggers > New campaign > ESP actions** page.

Manage your ESP actions + Create an ESP action

<p>ESP action name <input style="width: 90%;" type="text" value="Remove user"/></p> <p>ESP action type</p> <p><input checked="" type="radio"/> Remove user from target group</p> <p><input type="radio"/> Add user to target group</p> <p><input type="radio"/> Send message to user</p>	<p>ESP connection <input style="border-bottom: 1px solid #ccc;" type="text" value="Connection"/></p> <p>User property name <input style="width: 90%;" type="text" value="language"/></p> <p style="text-align: right; margin-top: 20px;"><input style="width: 150px;" type="text" value="you@domain.com"/> 🔍 Test ESP action</p> <p style="text-align: right; margin-top: 10px;">✔ Save ESP action Cancel</p>
--	---

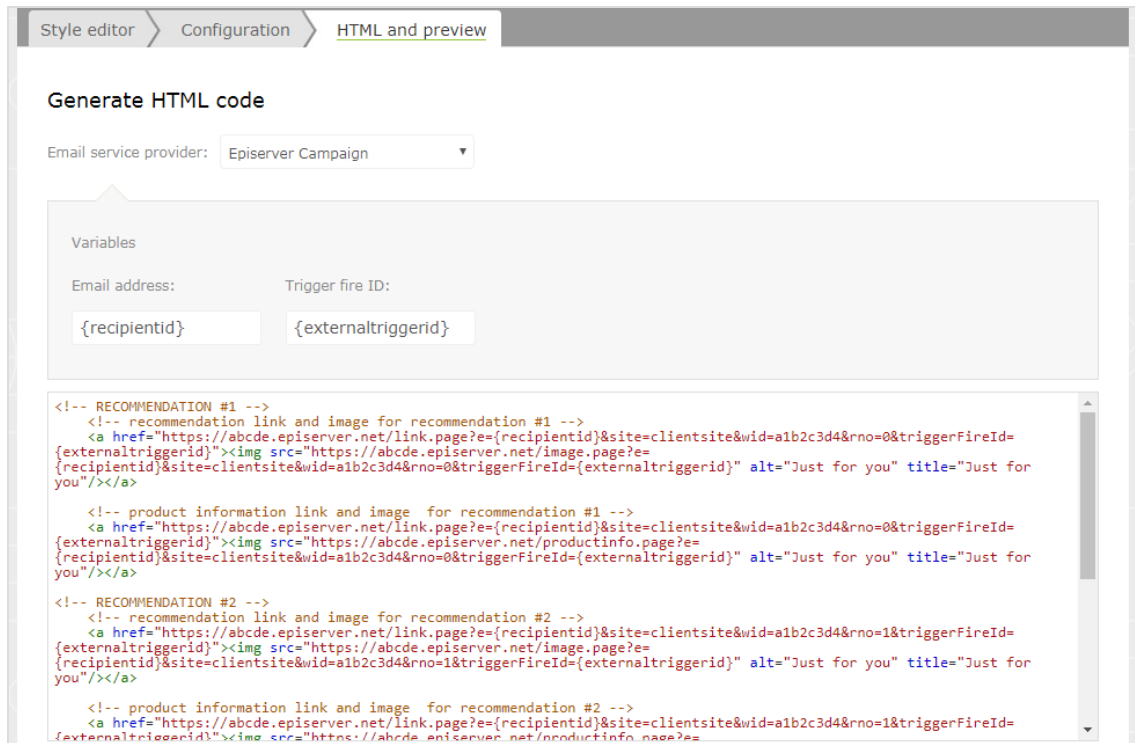
- a. **ESP action name.** Enter the action name.
 - b. **ESP action type.** Select **Remove user from target group**.
 - c. **ESP connection.** Select the connection that you created earlier.
 - d. **User property name.** The name of the user property in your recipient list that you want Triggered Messages to update. The name you specify must match exactly the *internal name* of the field in your recipient list (*language* in this example).
 - e. **Test ESP action.** Enter the email address of the user and click Test ESP action.
2. If the test is successful, click **Save ESP action**.

Setting up an email campaign in Optimizely

The following procedure shows how to generate HTML code to copy from Optimizely Email Product Recommendations into a mailing in the Optimizely portal.


1. In the for the Personalization Portal, go to Email Product Recommendations > **Campaigns**.
2. Select and open your Email Product Recommendations campaign.
3. In the **Configuration** tab, choose a trigger strategy.
4. Go to the **HTML and preview** tab.
5. Select **Optimizely Campaign** as the **Email service provider**.
6. Click **Generate code**.

- Copy the HTML code displayed in the window.



- Go to Optimizely Campaign.

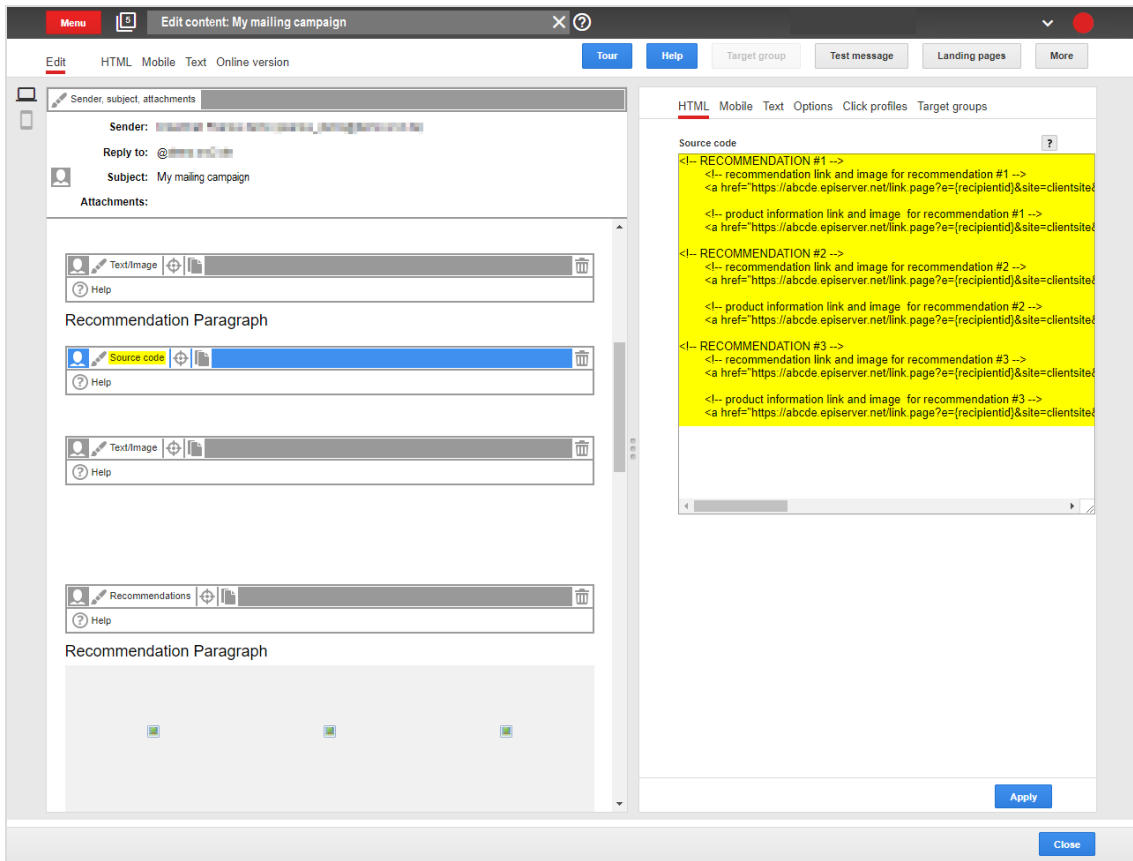
Note: To create a new mailing in Optimizely Campaign, go to **Campaigns > Transactional mails** and following the instructions in Transactional mails in the Optimizely User Guide.

- Open the Optimizely Campaign menu and select **Campaigns > Transactional Mails**.
- Select your email campaign.
- Click **Edit**.
- In the **Edit transactional mail** window that opens, click the email node and click **Edit** .
- Click **Edit content**.

14. In the editor, add or find the **Source Code** paragraph where you want to insert the Optimizely recommendations. In the image below, a separate **Text/Image paragraph** was added above for the heading *Recommendation Paragraph*.
15. Click the **HTML** tab.
16. In the **Source code** field, paste the HTML code (copied in step 6):

Note: You can modify the HTML to add the default image size that is sent for empty images that have no products. If you do not change the HTML, the default for both width and height is 1px for empty images that have no products. For example:

```
<a href="https://abcde.optimizely.net/link.page?
e={bmThirdParty}&site=clientsite&wid=12345&rno="0">
</a>
<a href="https://abcde.optimizely.net/link.page?
e={bmThirdParty}&site=clientsite&wid=12345&rno="0">
</a>
```



17. Click **Apply**.

Administering the for the Personalization Portal

The for the Personalization Portal is the user interface for accessing Product Recommendations, Email Product Recommendations, Email Content Recommendations, Triggered Messages, and Promoted content. Features include automatic product recommendations online and through email.

Note: You can see how a site is configured, but you must contact Optimizely Support to modify Personalization site attributes. for the Personalization Portal is available only if you have [Product Recommendations](#) or [Email Product Recommendations](#) installed on your site.

You can do the following functions with the **Admin** view.

- **Site management.** You can see how a site is configured but can modify site attributes only through contacting Optimizely Support. See [Managing your site](#).
- **User Management.** Using a user's CUID or IP address, you can view a snapshot of current user activity. See [Viewing session data](#).

Managing your site

Site management lets you perform the following functions.

- [View feed status](#)
- [View trigger settings](#)
- [View Personalized Search & Navigation settings](#)
- [View site settings](#)
- [View site groups](#)
- [Access site tokens](#)

Viewing feed status

You can view the status of the import of your site's product catalog feeds. The status is either **Successful** or **Error**. If you get an error status, click **Error** for more details about the error.

Feeds are automatically imported daily into the Optimizely Personalization system, but you can contact Optimizely Support to have a feed processed manually.

Run the product feed for this site
Feeds are run daily automatically.

Search

Site	Type	Requested	Finished	Status
[Redacted]	Full	01 Nov 2019, 16:24, Europe/London	01 Nov 2019, 16:28, Europe/London	Successful
[Redacted]	Full	01 Nov 2019, 16:21, Europe/London	01 Nov 2019, 16:23, Europe/London	Error
[Redacted]	Full	13 Oct 2017, 16:17, Europe/London	13 Oct 2017, 16:17, Europe/London	Successful
[Redacted]	Full	02 Oct 2017, 09:55, Europe/London	02 Oct 2017, 09:55, Europe/London	Successful

More results

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Viewing trigger settings

The **Manage Triggers for this site** view shows trigger settings. Contact Optimizely Support if you need to change the settings.

- **In-session triggers.** Shows whether triggers are enabled.
- **Daily triggers.** Shows whether daily triggers are enabled.
- **Scheduled time.** Shows the time when daily triggers go into effect.
- **Hashed email address.** Shows whether hashed email addresses can be viewed.
- **Maximum age of sessions.** Shows the number of milliseconds that a session can exist before it ends or becomes a new section.

- **Save config.** Save the specified settings.
- **Cancel.** Dismiss changes and return to the previous settings.

The screenshot displays the 'Site Management' interface. At the top, there is a breadcrumb trail: 'Triggered Messages' (with a right-pointing arrow) followed by 'Personalized Find'. Below this, the section is titled 'Manage Triggers for this site'. It contains several settings:

- In-session triggers:** A toggle switch currently set to 'On'.
- Daily triggers:** A toggle switch currently set to 'Off'.
- Scheduled time:** A field showing '09:00' and a dropdown menu currently set to 'Europe/London'.
- Hashed email addresses:** A toggle switch currently set to 'Off'.
- Maximum age of sessions:** A text input field containing '86400000' followed by the unit 'milliseconds'.

Below the triggers section is a 'Manage ESP' section with a list of checkboxes:

- Adobe Custom
- Cheetah Digital
- Selligent

At the bottom right of the interface, there are two buttons: a blue 'Save config' button and a grey 'Cancel' button.

Viewing Personalized Search & Navigation settings

The **Manage Personalized Find for this site** view shows the strategy for Personalized Search & Navigation. Contact Optimizely Support if you need to change the settings.

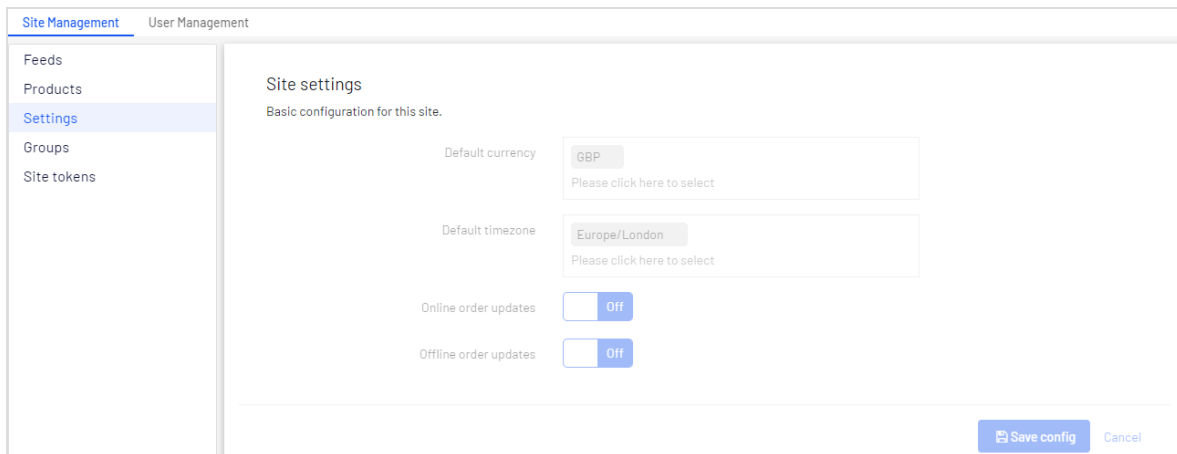
- **Personalized Find.** Indicates whether Personalized Search & Navigation is enabled.
- **Strategy.** Shows the strategy that is select for Personalized Search & Navigation. If there are more than one strategy, you can select another strategy though Optimizely Support.
- **Save config.** Saves the specified settings.
- **Cancel.** Dismisses changes and return to the previous settings.

The screenshot shows a web interface for 'Site Management'. At the top, there are two tabs: 'Triggered Messages' and 'Personalized Find', with 'Personalized Find' being the active tab. Below the tabs, the text reads 'Manage Personalized Find for this site'. There are two main settings: 'Personalized Find' is a toggle switch currently set to 'Off', and 'Strategy' is a dropdown menu currently showing 'Relevance (non-personalized)' with a prompt 'Please click here to select'. At the bottom right, there are two buttons: 'Save config' and 'Cancel'.

Viewing site settings

The **Site settings** view shows the following site attributes. Contact Optimizely Support if you need to change the settings.

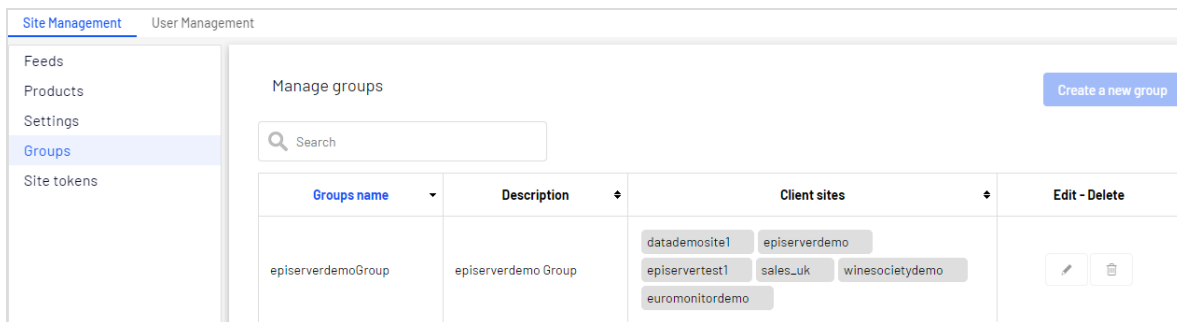
- **Default currency.** Shows the currency for your site.
- **Default timezone.** Shows the timezone for your site.
- **Online order updates.** Shows whether online order updates are accepted. If this is **Off** and a customer wants to add something to their online order, the customer will have to make a separate online order; if **On**, the customer can make changes to their online order.
- **Offline order updates.** Shows whether offline order updates are accepted. If this is **Off** and a customer wants to add something to their in-store order, the customer will have to make a separate in-store order; if **On**, the customer can make changes to their in-store order.
- **Save Config.** Saves the specified settings.
- **Cancel.** Dismisses changes and return to the previous settings.



Viewing your site groups

The **Groups** view shows groups that exist for client sites. Optimizely Support can modify the following.

- **Create new group.** Contact Optimizely if you need a new group.
- **Edit.** Click to modify an existing group.
- **Delete.** Click to remove the group from the site.
- **Sort.** You can sort the group attribute columns by clicking the headings.
- **Search.** Enter the name of a group to find it in the list. Partial names are allowed.



Accessing site tokens

For native clients, the **Site tokens** view shows the values of your tokens. The **Site admin token** is necessary when embedding the Personalization Portal in the

Optimizely global navigation; the **client tokens** are what you provide in the tracking request. See [clientToken](#) in the *Common Elements* topic on the Optimizely World site.

Site Management		User Management
Feeds		
Products		
Settings		
Groups		
Site tokens		
<p>Site tokens</p> <p>The access tokens for this site.</p>		
Token type	Token value	Action
Site admin token	<i>Not available</i>	Copy
Client token - web	<i>Not available</i>	Copy
Client token - mobile web	<i>Not available</i>	Copy

Viewing session data

You can view a user's session activity on a site using their CUID or you can view your own session activity by using your CUID or your IP address. The Session viewer lets you verify that tracking is being sent to the Personalization servers and that recommendations are being returned, with user interactions being tracked correctly. See [Tracking and Recommendations](#) on Optimizely World for information about how to use the Session viewer after you set it up, and what you should look for when you debug your site.

To view a user's session activity in the for the Personalization Portal:

Session viewer

My IP address
 CUID

Auto update off

Session
 Console

No items

Session ID	CUID	IP	Last viewed product	Last action time	User agent
There aren't any sessions available.					

© 2020 Episerver

If your CUID and session are active, you should see an entry under the session tab that will match your session and CUID values (as shown in the following image).

Session viewer

My IP address
 CUID

Auto update off

Session
 Console

Home Page
29/06/2020
12:09:34

Session ID	CUID	IP	Last viewed product	Last action time	User agent
122289924162	76872591012	123.45.67.89	N/A	29/06/2020 12:09:34	Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/83.0.4103.97 Safari/537.36

If no sessions are shown, try refreshing the page on the site being tested, or go to some other page on your site and try again.

Clicking on the area that contains the session information activates a list of tracking history on the right-hand side of the page for that user/session. The rows include information about the page type being tracked and the timestamp of the request, which can help to find specific requests when debugging issues. The

rows are ordered from top to bottom by most recent to oldest requests. New requests are added to the top of the stack.

Clicking on a row on the right-hand side opens the **Console** tab, containing more detail about the page. This is divided into the following sections:

- **Request.** Contains information about the page such as URL and timestamp. Most importantly, this tab shows the JSON payload received by Personalization. See [Tracking request format](#) on Optimizely World for information about the payload contents.
- **Response.** Shows the widgets returned for the current request and the generated recommendations. This is available in JSON format, or as an indexed list of recommendations and the key data associated with each, such as **recommendationId**, **refcode**, and **title**.
- **Track Info.** Shows key tracking information after being processed by the system. For example, product page requests show more details related to the product, such as associated attributes and prices from the latest feed import.

You can view each tab as the default JSON format, or the raw format for a more condensed view. You can expand or collapse entries in the JSON view.


Optimizely Visitor Intelligence

Note: Optimizely Visitor Intelligence is part of the [Optimizely Digital Experience Platform](#). It requires a specific installation and license. The Optimizely Digital Experience Platform contains many features to support you in your daily work. Depending on how your solution is set up, some features described in this documentation may not be available to you. Contact your system administrator to find out more. See [Optimizely World](#) for technical information.

Optimizely Visitor Intelligence is a user interface for viewing and filtering visitor profiles, and creating customer segments that you can use in your omnichannel marketing campaigns. The Optimizely Visitor Intelligence information is based on tracking of online visitor behavior, such as viewing content, or products on an e-commerce site.

The screenshot shows the Optimizely Visitor Intelligence interface. The top navigation bar includes 'Visitor Intelligence', 'Profiles', 'Segments', and 'Reports'. The main content area displays a visitor profile for Joseph Tillman, identified as #1 of 93386 in the list. The profile includes a placeholder for a profile picture, the name 'Joseph Tillman', and the alias 'Gottlieb - Brekke'. Contact information is listed as 'Phone' and 'Faroe Islands'. Below this, a table provides detailed contact information and a summary of visitor activity.

Contact Information	Summary
<ul style="list-style-type: none"> Joseph_Tillman@yahoo.com bert.net (503) 789-2722 x74 690-915-130 	<ul style="list-style-type: none"> Visits: 0 Last Seen: Today Identity: b62f5e8c-6ae4-4bf8-8d2e-

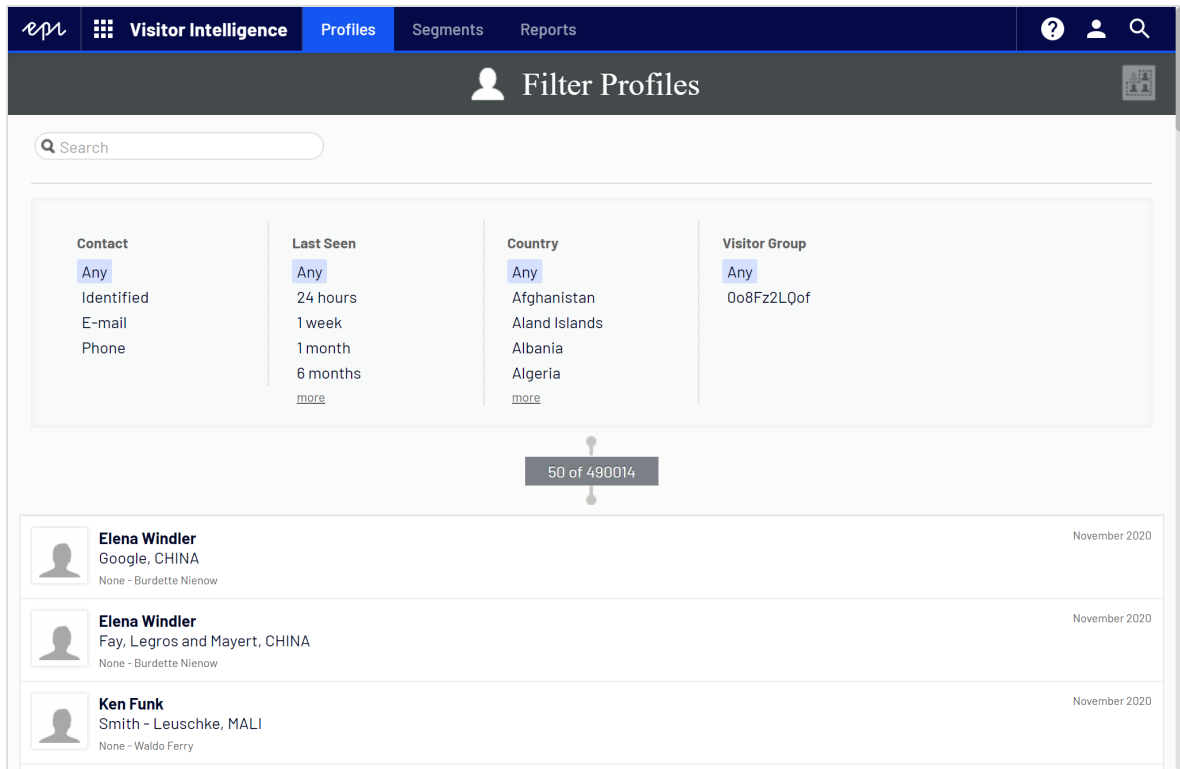
You can access Optimizely Visitor Intelligence via the product switcher . If you use Optimizely Campaign, you can access Optimizely Visitor Intelligence from the Optimizely Campaign menu under **Analytics**.

Optimizely Visitor Intelligence lets you view and use profile data in the following ways:

- [Viewing profiles](#). See a list of visitors that have viewed your site.
 - Filters let you display profiles based on selected criteria.
 - An individual profile view shows detailed information such as name, email, company, country of origin (based on the visitor's IP address), the time of the last visit to the site, and so on.
- [Creating segments](#). Create user segments from the profile list.
 - Each segment is an extract of profiles that matches the criteria that you have set up for the segment.
 - You can use segments as criteria when you create visitor groups in Optimizely CMS.
- [Viewing reports](#). View commerce reports for insights into collected customer data.
 - Lets you view data belonging to different scopes.
 - Charts for e-commerce KPIs, such as unique visitors, average session time, bounce rate, and daily revenue.

Viewing profiles

The **Profiles** view displays information about visitors and their activity on your site.



You can do the following in **Profiles** view.

- Filter the **Profiles** view by selection options in the **Contact**, **Last Seen**, **Country** and **Visitor Group** columns. Options that are not matched by any profile appear dimmed.

- **Contact**. Filter on profiles that have any kind of contact information.
 - **Anonymous** if the profile does not have any contact information.
 - **Identified** if the profile has a full name.
 - **E-mail** if the profile contains an email address.
 - **Phone** if the profile contains a telephone or mobile number.

Profiles that are associated with contact information such as phone number or email address display icons in the **Contact** column.

- **Last seen**. Lists the profiles and their last tracked activity within the defined time span. Profiles that match a search or filtering are listed by **Last Seen** in descending sort order by default.

- **Country.** Lists profiles connected to a certain country.
- **Visitor Group.** Lists visitor groups that are tracked by Optimizely Visitor Intelligence. For example, if you have a visitor group that filters out all users from France who have visited or your product page during a specific day, Optimizely Visitor Intelligence stores this data and you can create a segment that tracks data from this visitor group. Together with Optimizely Visitor Intelligence data such as the visitors' email addresses, you can use the segment to target all your French visitors who visited your product page on Black Friday in a mailing campaign. See [Creating a marketing segment](#). The tracking of visitor groups has to be set up by a developer.
- Sort each column by clicking the column headers: **Name**, **Company**, **Country**, or **Last Seen**.
- Search profiles for names, companies, and so on. Matches appear instantly.
- Create a segment from any filtered result by clicking **Save as segment....** See [Creating a marketing segment](#).
- View individual profile details by clicking the profile record.

Detailed profile information appears when you select a row in the **Profiles** view.

Viewing profile details

Each profile has a unique identity (GUID) to distinguish between visitors with no contact information at all.

Note: Cookies track a visitor's behavior. If a visitor deletes cookies between visits, or visits a website from more than one device (such as a mobile phone and a computer), then the visitor may be connected to more than one profile.

Each profile contains detailed information that is collected for a visitor in three sections. Click a profile to display the details; click **Go to list** to go back to the **Profiles** view.

- The visitor's contact information appears at the top.

The screenshot shows the profile page for Joseph Tillman. At the top, there is a navigation bar with 'Visitor Intelligence', 'Profiles', 'Segments', and 'Reports'. Below this, a 'List' button and a status indicator '#1 of 93386 in list' are visible. The profile header includes a placeholder for a profile picture, the name 'Joseph Tillman', and the alias 'Gottlieb - Brekke'. Contact information includes an email address 'Joseph.Tillman@yahoo.com', a phone number '(503) 789-2722 x74', and a location 'Faroe Islands'. A summary table shows 0 visits, last seen today, and an identity hash.

Contact Information	Summary
<ul style="list-style-type: none"> ✉ Joseph.Tillman@yahoo.com 🌐 bert.net 📞 (503) 789-2722 x74 📠 690-915-130 	<ul style="list-style-type: none"> Visits: 0 Last Seen: Today Identity: b62f5e8c-6ae4-4bf8-8d2e-

- The visitor's events appear in a timeline, grouped by type such as by orders placed, shopping cart, viewed products and categories, and home page visited. You can select each event to display more information.

The screenshot displays a 'Timeline' view of visitor events. A 'Show all' link is at the top left. The timeline is organized by date, with a 'November' header. The first group is for '10 November, Today', which includes a list of events: 4 of 'basket', 5 of 'product' (with sub-events for 'French Terry Stripe Tunic', 'Woven Short', 'Essential Short Sleeve Crew Tee', 'Short Sleeve Scoopneck Tee', and 'L/S ComfortBlend Tee'), 4 of 'category', 1 of 'wishlist', and 3 of 'home'. The second group is for '4 November, 6 days ago', which includes 3 of 'home'.

The timeline shows the dates for each visitor's activity per month including time and the traffic source. Click **Show all** or a specific event to expand for more detailed information. By clicking **Show more** at the bottom of the timeline you can expand the timeline to show activities further back in time.

Tip: Click the URL if you want to view the page that tracked the activity.

The timeline tracks the number of the following activities:

- **Viewed products.** Expand to see the time and product code on the website.
- **Placed orders.** Expand to see the time and order number.
- **Visited categories.** Expand to see the time and categories user visited.
- **Shopping cart** (displayed as Basket). Expand to see the time that user updated the shopping cart.
- **Homepage.** Expand to see the time that user visited website homepage.

Consolidating profiles

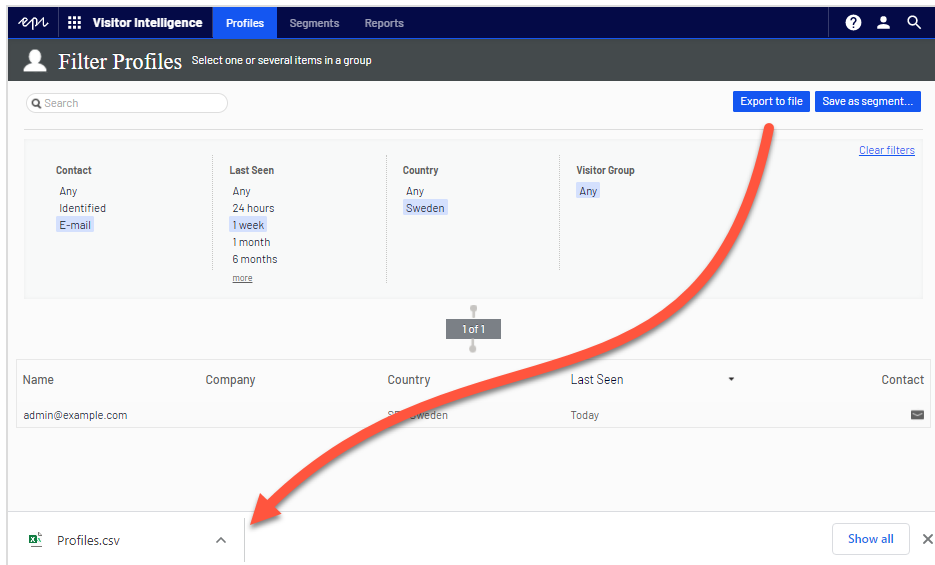
One user can have several profiles when the user visits the site using different browsers or several devices. The Profile Store is the functionality behind Optimizely Visitor Intelligence that detects and merges profiles that correspond to one person based on the user's email address.

Profile Store creates a new anonymous profile each time an anonymous visitor enters a site for the first time. The email address is stored in a corresponding profile when an email is provided in the tracking request, depending on how the tracking implementation is designed for a specific website, but tracking usually happens after visitor logs into a website.

If the user browses the site with another browser or another device, the activity is tracked and linked to another anonymous profile until a tracking request contains a user email address. When this occurs, Profile Store examines other existing profiles with the same email address and, if found, associates the device with this profile and merges the statistics. After a profile is consolidated, the anonymous profile is removed and additional user activity on both devices or browsers is tracked and associated with the consolidated profile.

Exporting profile data

You can export profile data to a CSV file by selecting the filters you want to create the data set and clicking **Export to File**.



Collecting profile data

If a user signs in, Optimizely Visitor Intelligence extracts the data from the registered information (such as Full Name and Street/Mail Address) and the user's country, based on IP address. If there is no data supplied, the user's identity is marked as **Unknown**. The following list shows fields and the strings each represents.

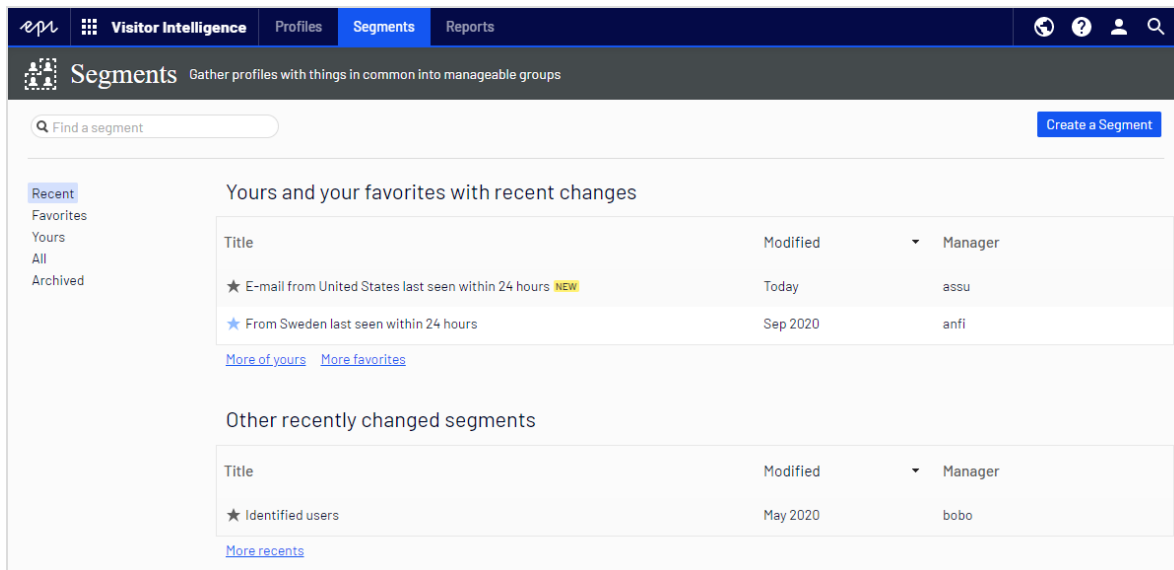
- **E-mail.** Email that user registered with.
- **Name.** Full name from register information (such as *Jane Doe* or *Hans Strueber*).
- **Last Seen.** The number of days since the the user last logged in to the website.
- **Country.** Two-letter country code (such as *US* or *SE*).
- **Web or Home page.** URL for a website.

Creating a marketing segment

A segment is collection of user profiles that you can use to target website content and optimize your online campaigns. For example, you can create a segment for visitors that have previously responded to a campaign and display a loyalty discount code for returning visitors only; see personalizing content and using visitor groups in the Optimizely CMS Editor User Guide.

Segments are dynamic. If you create a segment with the criteria *visitors from Sweden, two visits within the last fortnight*, the profiles change as new visitors view the site and previous visitors do not return.

The **Segments** view shows recently created segments, and segments labeled as your favorites. To designate a segment as a favorite, select the star icon ★. You can search and filter segments.



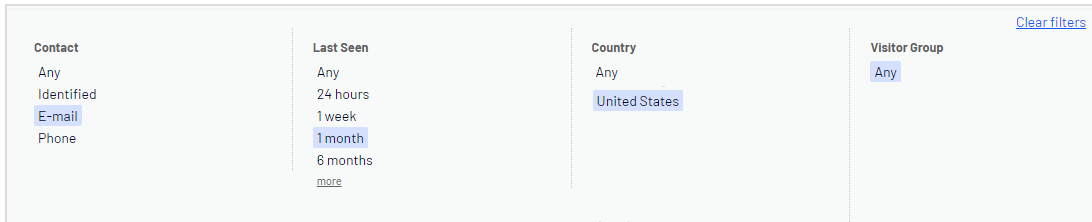
The screenshot shows the 'Segments' view in the Optimizely interface. The top navigation bar includes 'Visitor Intelligence', 'Profiles', 'Segments', and 'Reports'. The main header reads 'Segments Gather profiles with things in common into manageable groups'. A search bar is labeled 'Find a segment' and a 'Create a Segment' button is visible. The content area is divided into two sections: 'Yours and your favorites with recent changes' and 'Other recently changed segments'. Both sections contain a table of segments.

Title	Modified	Manager
★ E-mail from United States last seen within 24 hours NEW	Today	assu
★ From Sweden last seen within 24 hours	Sep 2020	anfi
More of yours More favorites		
Title	Modified	Manager
★ Identified users	May 2020	bobo
More recents		

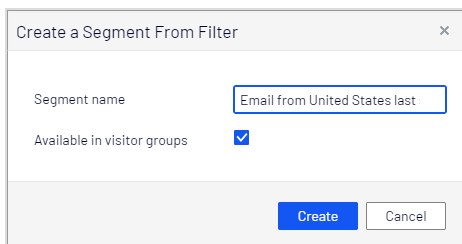
Creating a segment by filtering visitor profile data

You can create a segment by filtering visitor activity and historical data.

1. In the **Profiles** view, select the filters you want from the **Contact**, **Last Seen**, **Country**, and **Visitor Group** columns.



2. Click **Save as segment....** The **Create a Segment From Filter** dialog box appears.



3. Enter a name for the segment, or accept the filled-in value.
4. Select **Available in visitor groups** if you want the segment to be used in visitor groups.
5. Click **Create**. The new segment appears in the **Segments** view.



Creating a segment based on filter definition

Using filter definitions lets you create advanced segments based on visitor activity, historical data, and profile data. For example:

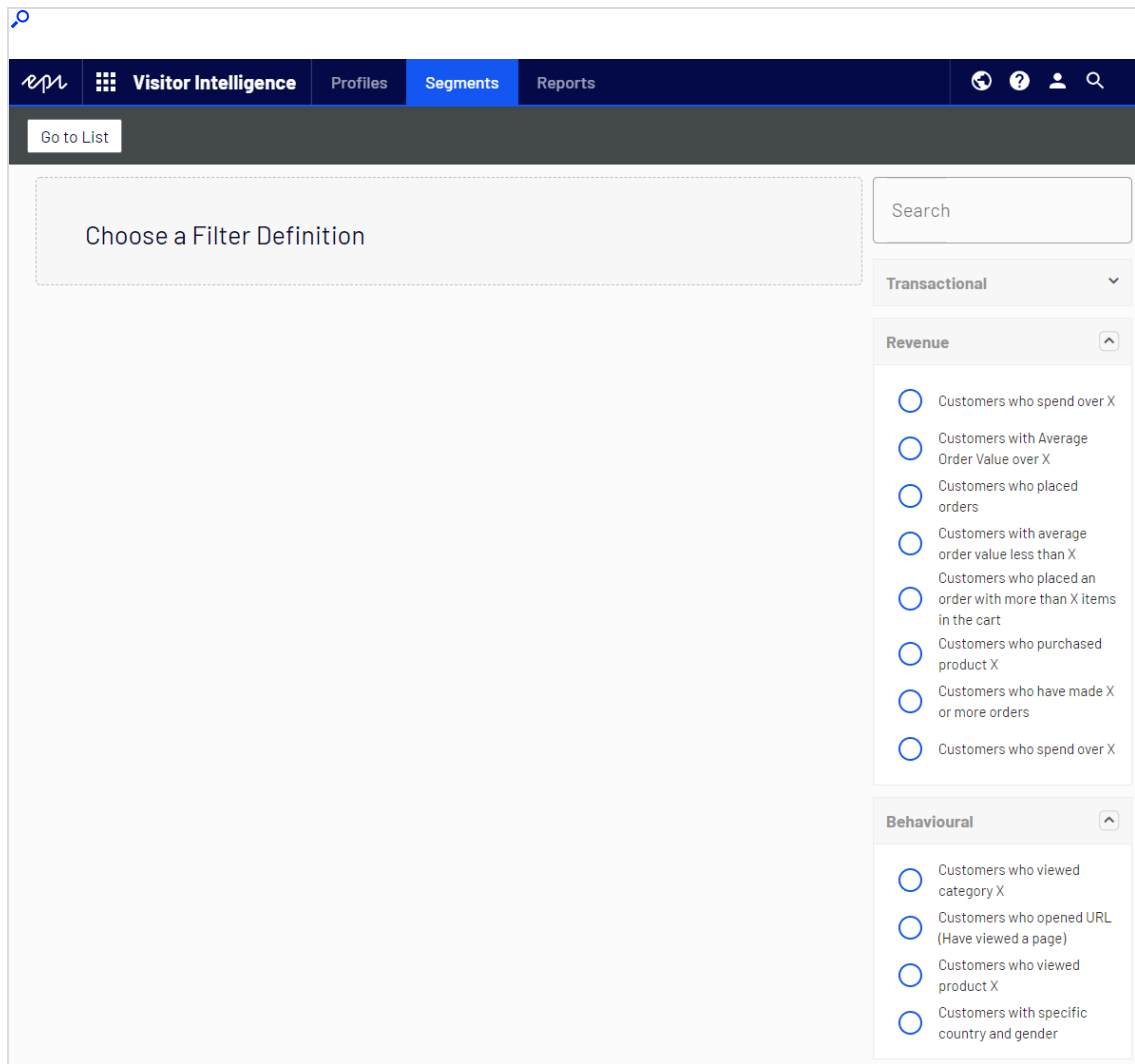
- visitors who have bought specific product during a specified time period,
- users who have ever opened any campaign email, or
- visitors with abandoned carts today.

Optimizely Visitor Intelligence comes with a default set of shared filter definitions based on best practices of using track events in common scenarios, but developers can also create customized filter definitions specifically for your

website. In the user interface, you will see the shared (built-in) filter definitions that are compatible with the Optimizely products you have installed, and also those that have been customized for your website. For more information on how to create customized filter definitions and also a list of all available shared definitions, see [Optimizely World](#).

You can create segments based on these reusable filter definitions and tracked statistics from visitor groups. The images in this section are examples, and your user interface may look different.

1. In **Segments** view, click **Create a Segment**. The **Segment filters** view appears. On the right side are categories that you can expand to see the shared and customized filters available for your website.

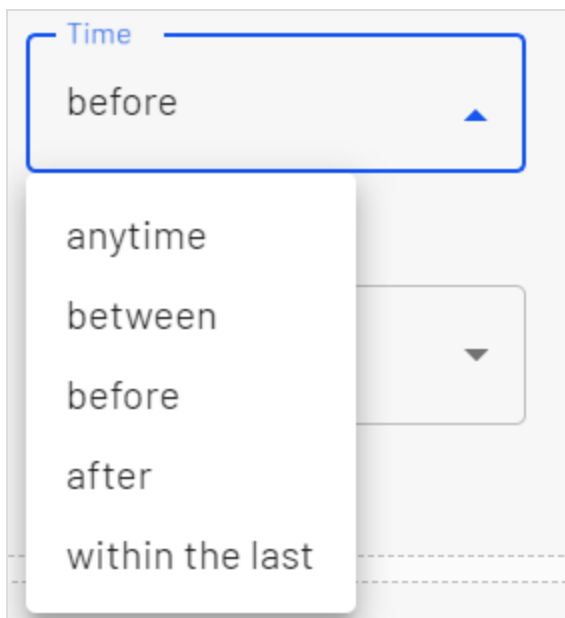


2. Select a filter definition from one of the categories. Its parameters appear in the view.
3. Fill in the parameters as applicable.
4. You can add a time and occurrence filter to further limit the matching profiles in the segment.
 - **Time.** The time filter lets you combine an event with a time range, such as "Customers who spent more than \$100 *within the last 7 days*". For filter definitions based on events, the time when the event occurred is used. For filter definitions based on profile data, the *Last Seen* property in the profiles

is used. If you set specific dates, the times used are 00:00:00 on the start day, and 23:59:59 on the end day. If you set number of days, for example, *within the last 7 days*, the segments includes matching profiles from 00:00:00 on the start day up until now.

You can set the following time frames under **First visit**:

- **anytime**. A time range is not specified.
- **between**. Between a specific start and end date.
- **before**. Before a specific date.
- **after**. After a specific date.
- **within the last**. Within the last number of days.



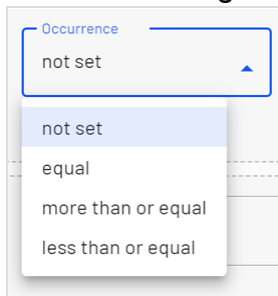
- **Occurrence**

Note: This type of filter only works on event filter segments where the occurrence of profiles is countable. You will get a warning message ("*Warning: This filter may include an aggregation. Adding occurrence parameter can return incorrect results.*") when a filter

definition does not support an occurrence filter.

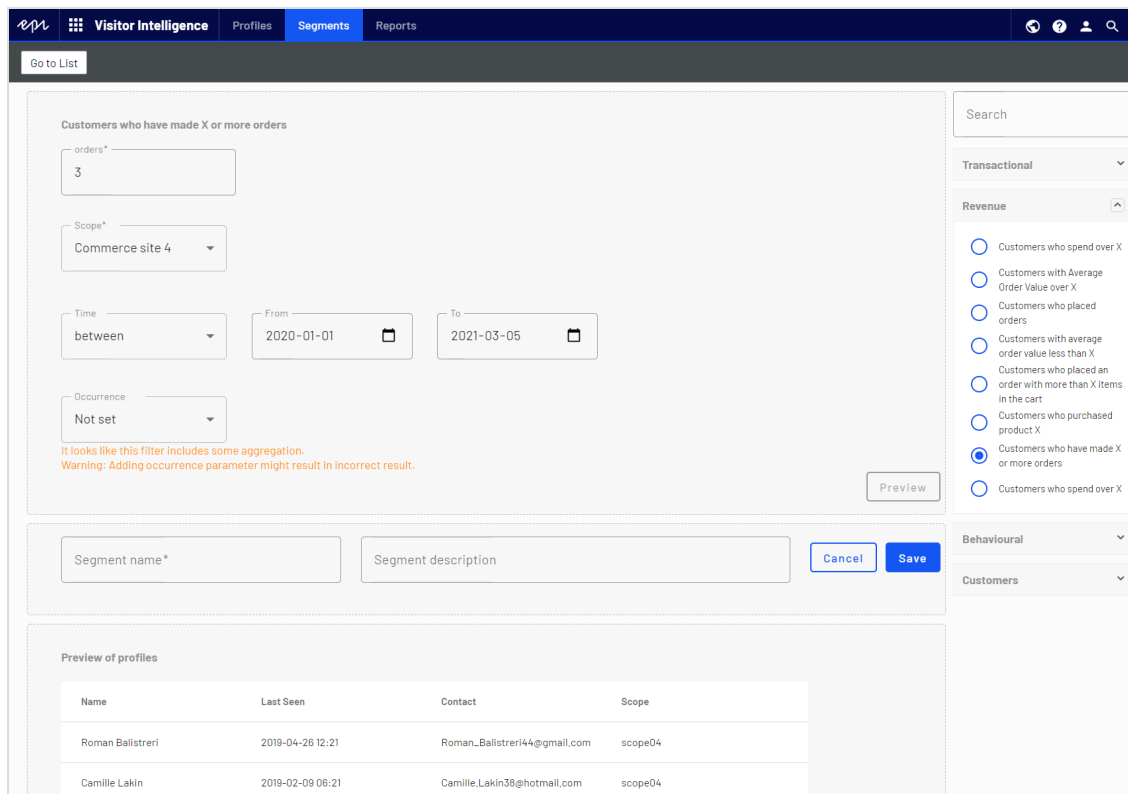
You can specify the following type of occurrences under **Occurrence**:

- **equal**. Occurrence equals the specified value exactly. For example, "*equal 3 times*" can filter out customers who have placed exactly 3 orders and include those in the segment.
- **more than or equal**. Occurrence is more than or equal to the specified value. For example, the occurrence filter "*more than or equal 3 times*" can filter out customers who placed 3 or more orders and include those in the segment.
- **less than or equal**. Occurrence is at least once and less than or equal to the specified value. For example, "*less than or equal 3 times*" can filter out all customers who have placed 1, 2, or 3 orders and include those in the segment.

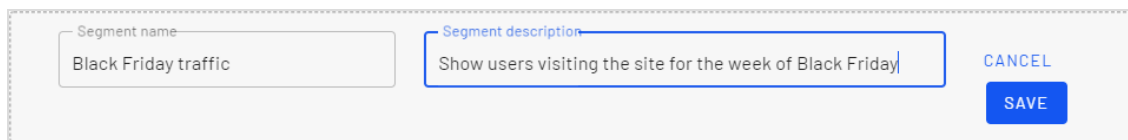


5. Click **Preview** to see which profiles the filter affects.

Note: Up to 1000 profiles that match the filter criteria are displayed in the **Preview of profiles** view.



6. Give the new segment a name and description and click **Save**.



The segment is saved and added to the **Segments** view.

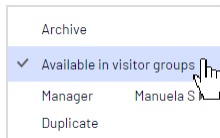
Note: After you create a segment based on events data, a cache of matching profiles is built for the new segment. This cache is refreshed daily.

Editing a segment

You can edit the attributes of a segment from its context menu in the **Segments** view. You can also click the individual segment to modify its attributes. Optimizely Visitor Intelligence automatically saves actions you make. If you have pending changes in your draft, click **Apply changes**.

- **Title.** Edit the title of the segment.
- **Description.** Enter a description about the segment.

You can apply additional attributes through the **Actions** menu.



- **Archive.** Select this option to remove the segment from the **Segments** view. Refresh the screen to update the list. You can deselect this option in the **Archive** view to restore the segment to the **Segments** view.
- **Available in visitor groups.** Use this segment in visitor groups.
- **Manager.** Choose the person you want to be responsible for managing this segment.
- **Duplicate.** Create a copy of the segment that you can modify to create a new segment.

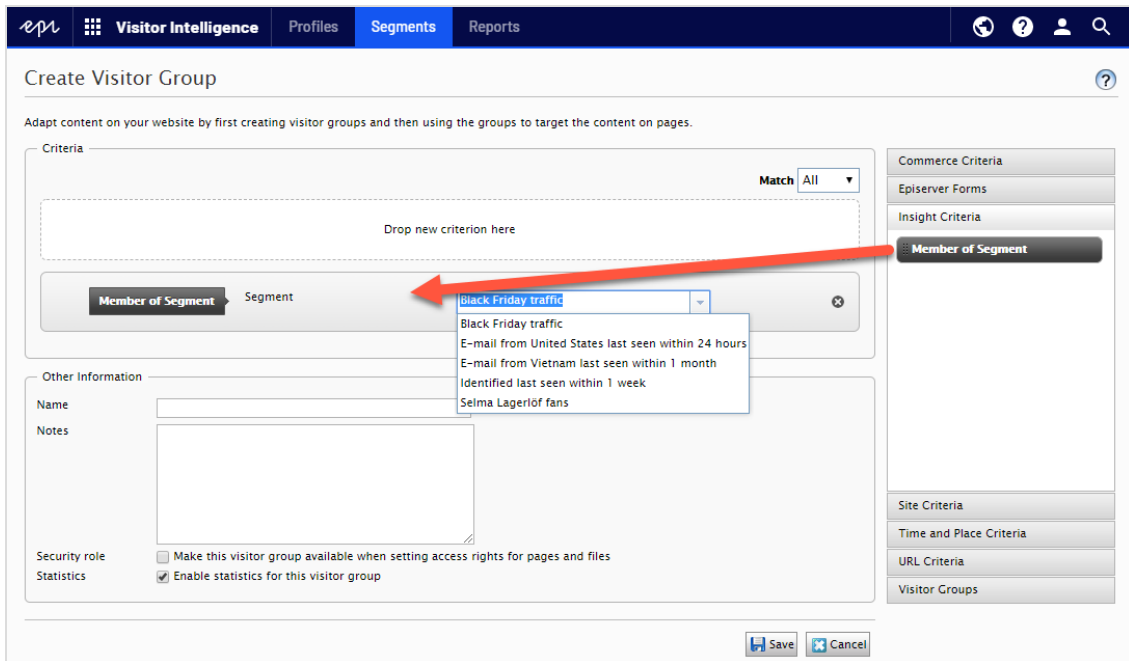
Using a segment as a visitor group

When you create a segment, you can make it available to visitor groups in Optimizely CMS. Once available there, you can set up a visitor group that uses this segment as a criterion and then personalize your website content for this visitor group specifically.

Note: You need administration rights to set up new visitor groups.

For example, if you want to use the Black Friday traffic segment that you created in the previous example, follow these steps:

1. Make sure that you set **Available in visitor groups** for the segment you want to use as a visitor group. This is so it shows up in the **Member of Segment** criteria.
2. In the top menu, go to **CMS > Visitor groups** and click **Create** to create a new visitor group.
3. Drag the **Member of Segment** criterion from the **Insight Criteria** tab in the pane on the right and drop it into the **Drop new criterion here**.



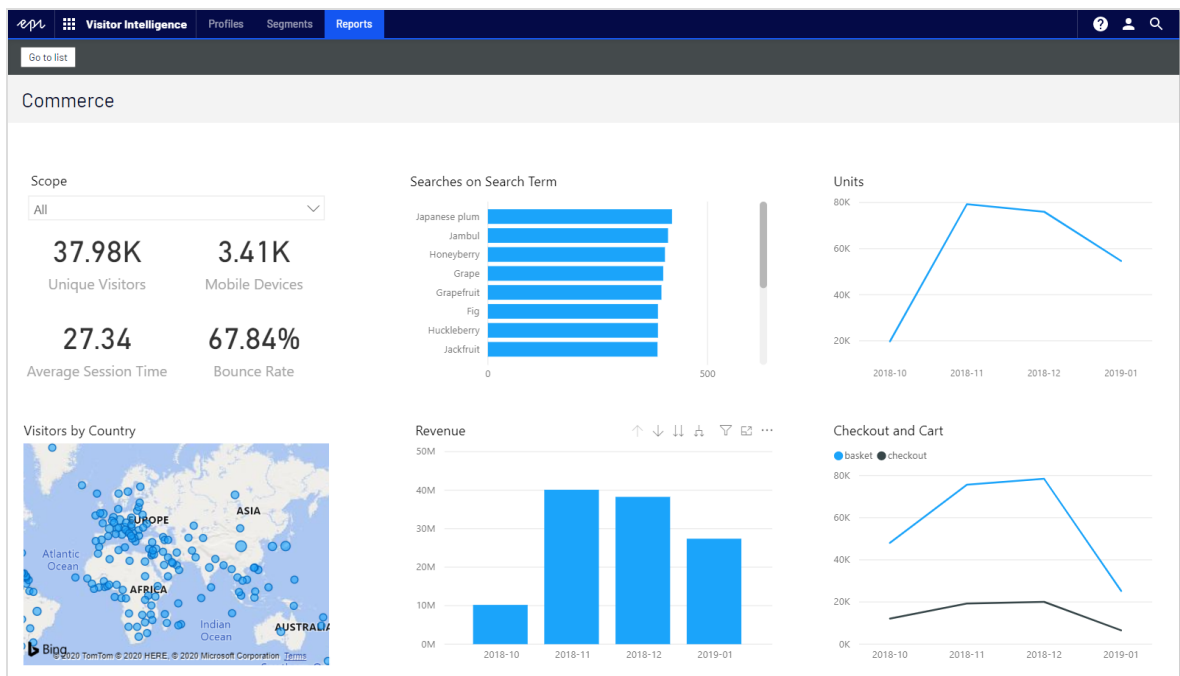
- a. Select the segment you want from the **Segment Membership** drop-down list.
 - b. Name the visitor group and add other criteria if necessary, and then save the visitor group.
4. Personalize the content as described in the CMS Visitor groups topic and select your new visitor group from the list. See also Personalization.

Using a segment as a target group in Optimizely Campaign

If you have Optimizely Campaign, you can use segments from Optimizely Visitor Intelligence as target groups for your campaigns in Smart Campaigns and Marketing Automation. See Using marketing segments as target groups for mailing campaigns in the Optimizely User Guide.

Reports view

Optimizely Visitor Intelligence provides the user interface to view commerce reports for insights into collected customer data. Each report is listed separately in the Report section.



Data can be separated into different scopes by a developer. A scope is used to separate data belonging to a business area, such as brands or markets, or to separate the behaviors of a tracked user. Each user can have a separate profile and

interactions history per scope, so that personalization and marketing activities are relevant to the behavior within the context of that scope.

Commerce report

The Commerce report contains the following charts for an e-commerce site. The charts help you understand how visitors are interacting with your site. The report is updated every hour. The reporting period is 3 months from past hour. The reporting period cannot be changed in the current version of Optimizely Visitor Intelligence.

- **Scope Selector.** In the scope selector you can select a scope and see charts for that scope. By default, **All Scopes** is selected and data from all scopes are applied to charts. This is not an issue if you only have one scope, but you should keep in mind that it mixes profiles and track events across all scopes when your site has more than one scope.
- **Unique Visitors.** Number of unique profiles who visited the website.
- **Mobile Devices.** Number of mobile devices used to visit the website.
- **Average Session Time.** The average time visitors spend on the website in each session.
- **Bounce Rate.** The percentage of visitors who only visited the first (landing) page in the website and did nothing else.
- **Visitors by Country.** Number of visitors from each country/region. The size of the circle presents the amount of visitors.
- **Searches on Search Term.** Number of searches for each keyword that a visitor typed in the search bar.
- **Daily Revenue.** Total sells in each day.
- **Units.** Number of products sold in each day.
- **Checkout and Cart.** Number of checkouts and number of actions that added product into shopping cart.

Personalizing with visitor groups

One way you can a digital experience in Optimizely is to create a visitor group with criteria for that group. For example, you can design a product banner specifically for first-time visitors, or for visitors from a geographic region or market. For information about visitor group criteria, see [Administering visitor groups in the CMS Administrator User Guide](#).


In Optimizely CMS, you can personalize any type of content in the rich-text editor and in a content area; personalize part of a text, an image, or a block in the CMS rich-text editor, or personalize an image, a block or a page in a content area, if you have these in your web pages.

If you have multiple visitor groups, a visitor may match more than one visitor group. You then can use **personalization groups** to group content to avoid displaying the same content twice, and display **fallback content** to visitors who match no visitor groups.

The preview option in the top menu lets you preview the personalized content as the visitor groups will see it, before publishing.

Applying personalization

In the rich-text editor

1. In Optimizely CMS, open the page for editing, and select the content you want to personalize in the editor area.
2. Click **Personalized Content**  in the editor toolbar.

3. Select one or more visitor groups from the list.

Personalized Content

Personalization Settings

Select the visitor group(s) that should see this content

No group selected



Personalization groups are used to group personalized content for different visitor groups, or no visitor groups.

Include in a personalization group

Pricing

As an option, you can display fallback content to visitors not matching a visitor group. To do so, include the fallback content in a personalization group but leave the visitor group field empty.

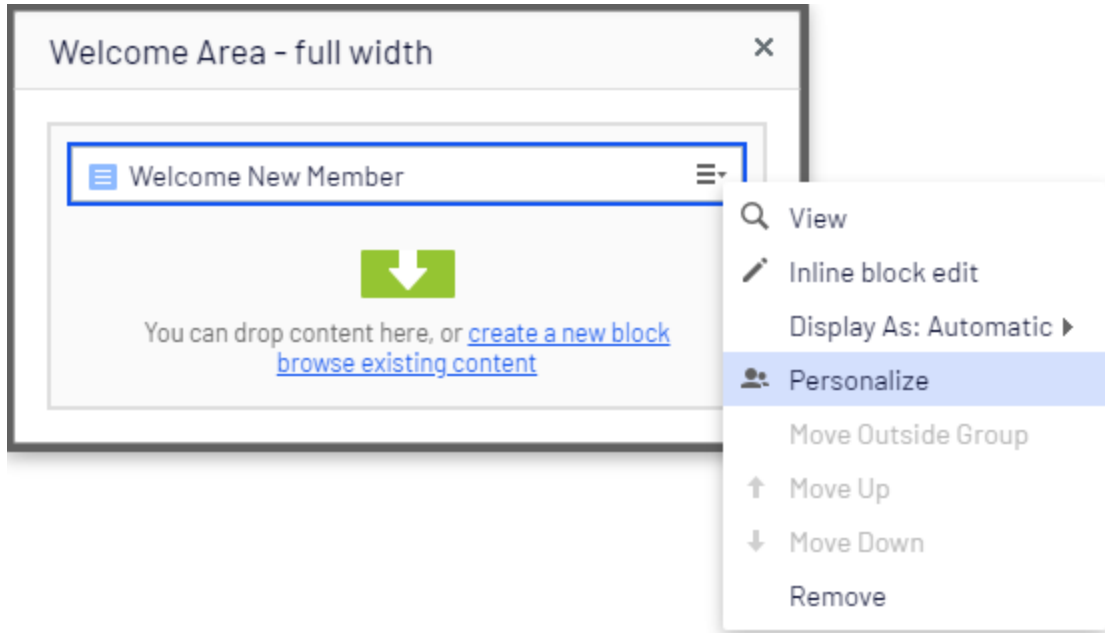
OK Cancel

4. Preview the personalized content to verify the result. To do this, click  > .

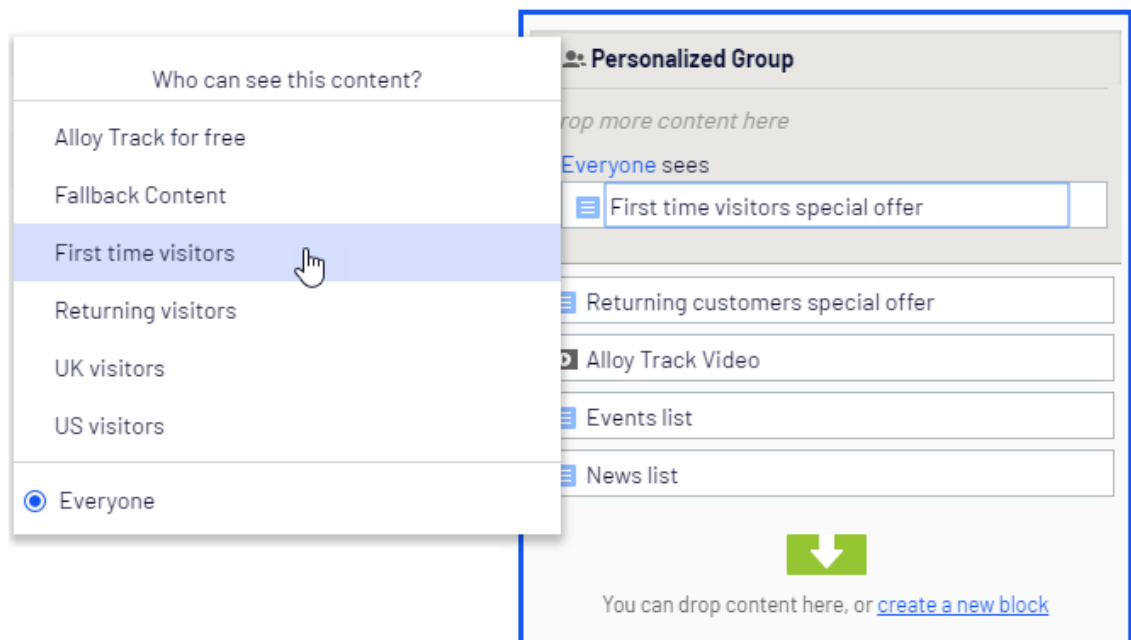
In the content area



1. Open the page for editing, and select the content you want to personalize in the content area.

2. Select **Personalize** from the context menu.



3. Select one or more visitor groups from the list.



4. Preview the personalized content to verify the result. To do this, click  > .

Editing and removing personalization settings

In the rich-text editor

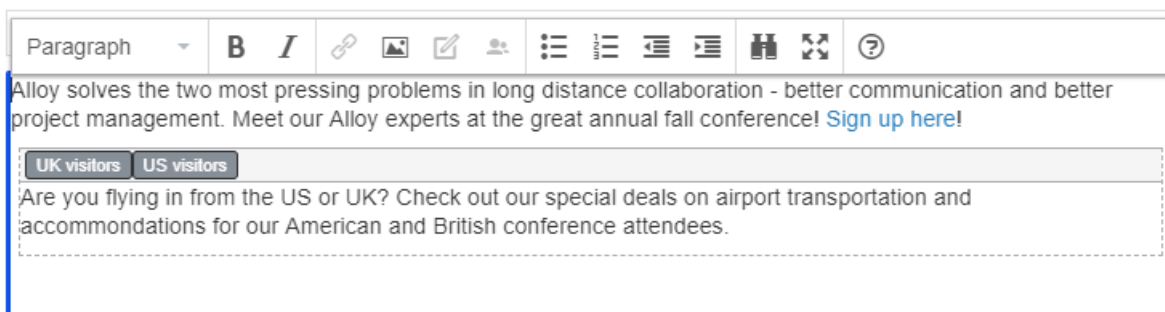
Click **edit** for the personalized content, and update the personalization settings, or select **Remove Personalization**.

In the content area

Expand the desired **Personalized Group** section and click the desired visitor group link to edit the settings. To exclude content from personalization, drag it outside the group, or select **Move Outside Group** in the context menu.

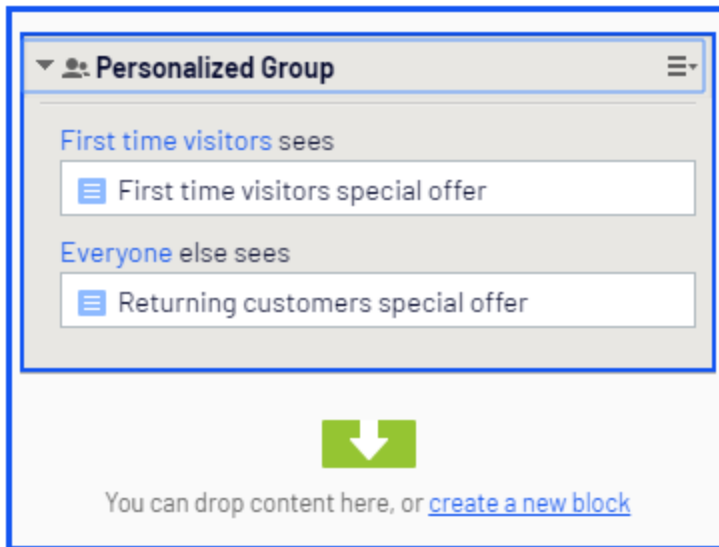
Example: displaying content to multiple visitor groups without fallback

In the rich-text editor



The non-personalized text at the top of the rich-text editor in this example is always displayed. The personalized text appears **only** to visitors matching any of the visitor groups **UK visitors** and **US visitors**.

In the content area



In this example, **Returning visitors** see one block, and **First time visitors** see another. Visitors that do not match any group do not see anything in this content area.

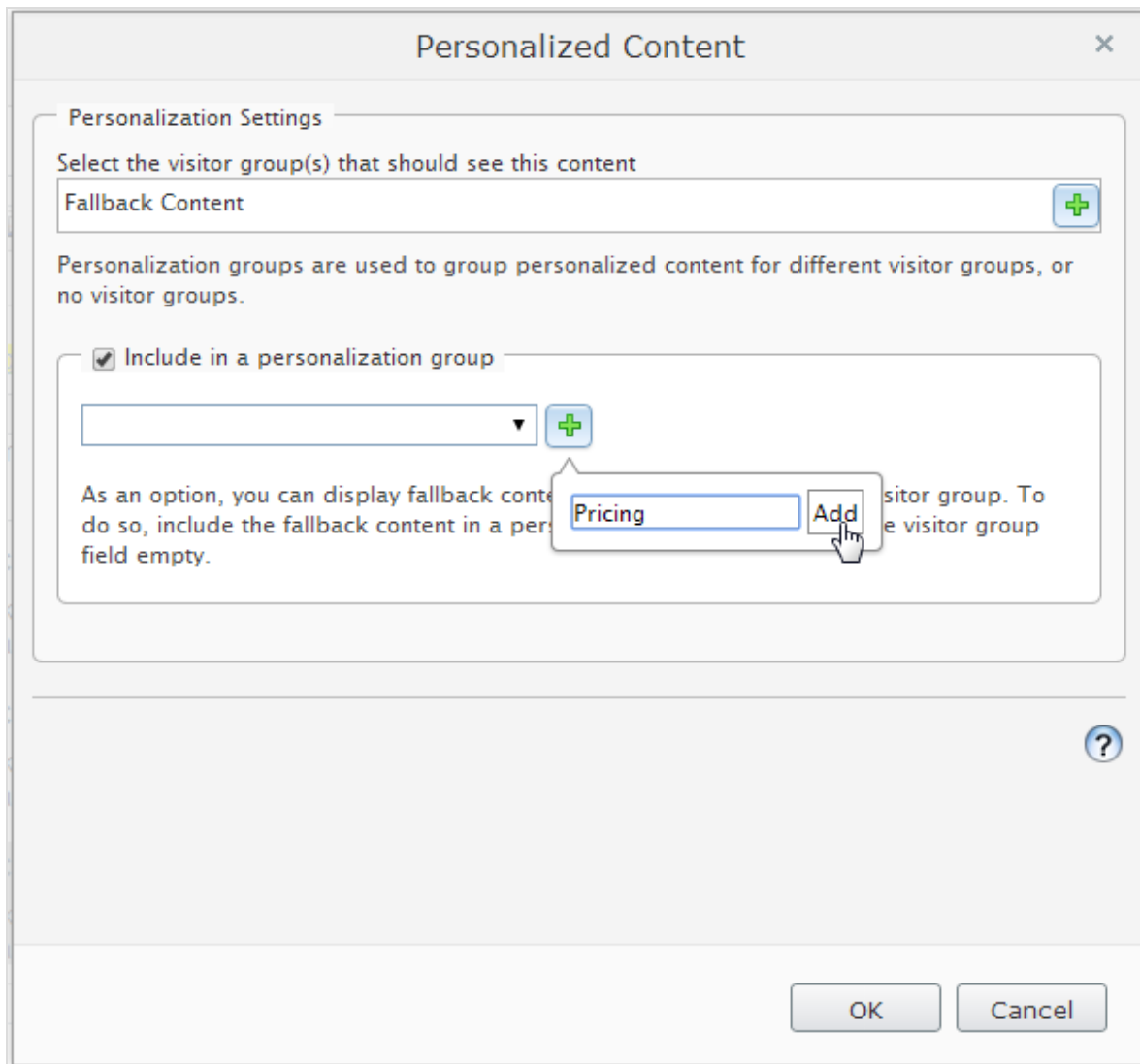
Example: displaying content to multiple visitor groups with fallback

You want to display specific price information to visitors from the UK and US, and other price information to visitors from other countries. To avoid displaying price information twice for visitors from the UK and US, you need to use a personalization group for fallback content.

Note: The order in which the personalized content is placed within a personalization group does not matter, but placing the fallback content at the end makes it easier to follow the personalization flow.

In the rich-text editor

Select the fallback price information text and personalize it without selecting a visitor group. Instead create a *Pricing* personalization group and apply this.



Personalize the price information texts for the UK and US visitor groups, and also **include them in the "Pricing" personalization group**. The personalization group appears to the right.

The screenshot shows a content editor interface. At the top is a toolbar with options like Paragraph, Bold (B), Italic (I), Link, Image, Text, User, Lists, Columns, Tables, and a Help icon. Below the toolbar is a paragraph of text: "Alloy solves the two most pressing problems in long distance collaboration - better communication and better project management. Meet our Alloy experts at the great annual fall conference! [Sign up here!](#)".

Below the paragraph are three distinct content blocks, each with a header, a title, and pricing information:

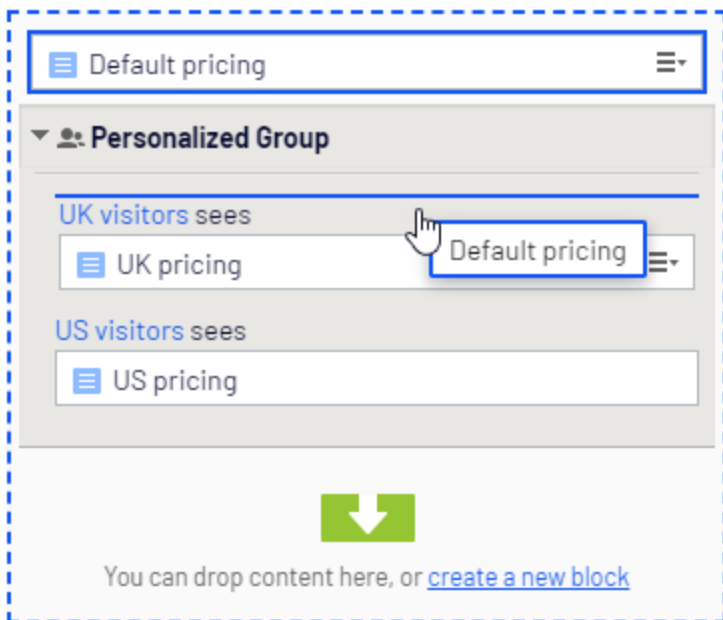
- US visitors:** Header "US visitors", Title "Conference prices", Content "Conference ticket 200 USD", "Hotel 2 nights and airport transportation 250 USD".
- UK visitors:** Header "UK visitors", Title "Conference prices", Content "Conference ticket 160 GBP", "Hotel 2 nights and airport transportation 200 GBP".
- Fallback Content:** Header "Fallback Content", Title "Conference prices", Content "Conference ticket 180 EUR", "Hotel 2 nights and airport transportation 225 EUR".

Each block has a "Pricing" button in the top right corner.

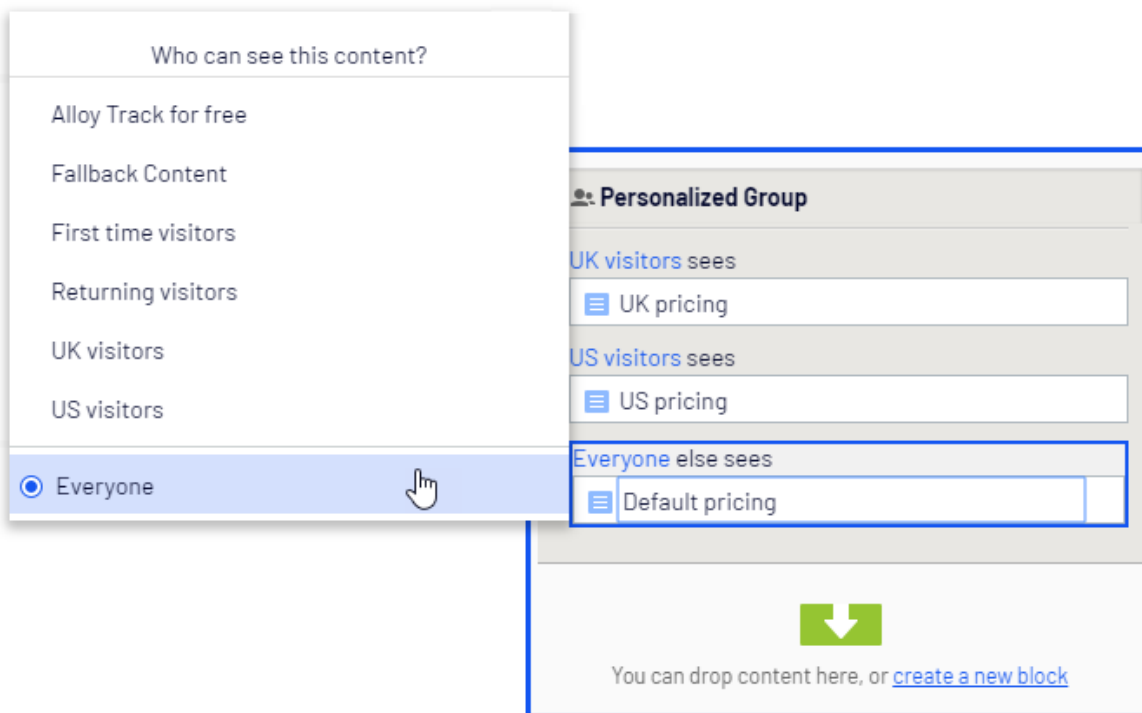
Now the personalization for this content is matched within the same personalization group.

In the content area

This example shows pricing information as individual blocks, and the **Default pricing** is the fallback content displayed to visitors from other countries than the UK and US. Select **Personalization** in the context menu for a block to create a personalization group, and drag the other blocks into the group.



Personalize each block within the group by applying the appropriate visitor group. Use the **Everyone** option to display the fallback content displayed to visitors not matching any visitor group.



Search engine indexation and visitor groups

Search engines crawl your website to index your content. So what if your content is personalized through visitor groups, what will the search engine crawler see? It all depends on how the visitor group is assessed at the point of crawl. If you have a visitor group *Visitors from the UK*, the crawler will index the content personalized for UK if the crawler has an IP that is identified as being in the United Kingdom. Otherwise that content is not indexed.

Another example is where a date/time visitor group criteria has been applied. If you have a *Weekend only* visitor group, then the content will be indexed if the crawler comes along at the weekend, otherwise not.

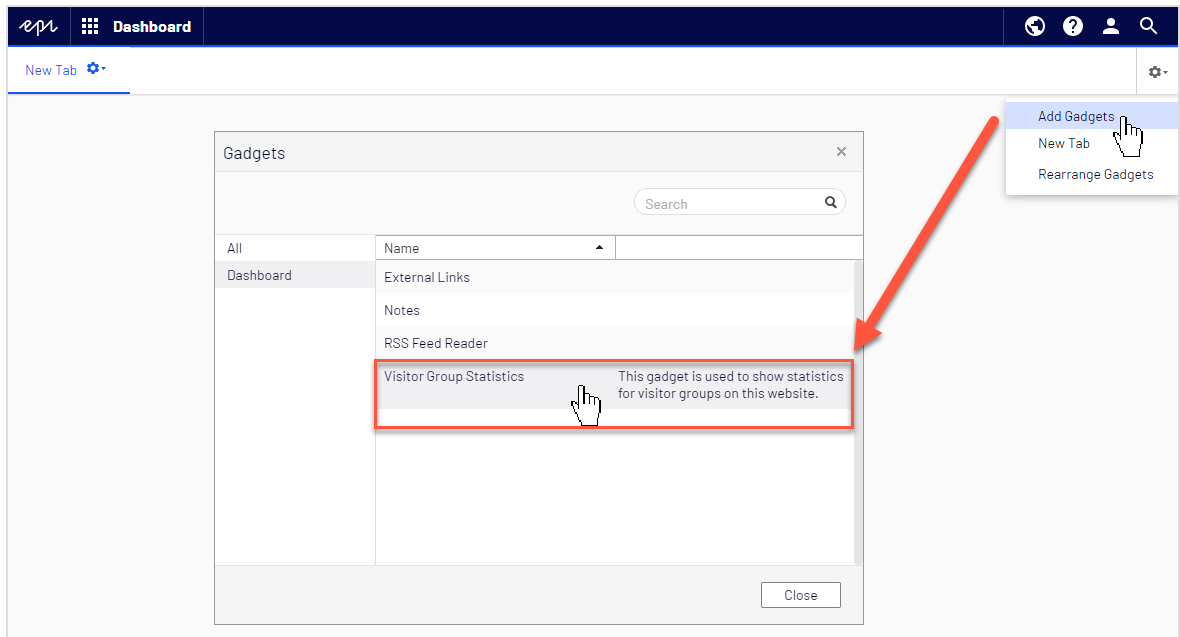
It is good practice to have *Everyone* content in a group, if it is important that something is shown (or crawled) in a area of the page.

Providing access to content using visitor groups

Administrators can also grant access to specific content using visitor groups. For example, the administrator can make a page or a block accessible only to visitors from the UK, by providing access for the **UK visitors** visitor group; see Access rights in the CMS Administrator User Guide.

Monitoring visitor group activities

You can monitor visitor group activities by following the number of visits to personalized content. The result appears using the visitor groups statistics gadget on the Optimizely dashboard; see Gadgets.




Personalizing Commerce content with visitor groups

If you have Optimizely Commerce installed, there are additional visitor group criteria available specific for e-commerce scenarios. See Commerce-specific criteria in the User Guide.

Personalizing with connector add-ons and visitor groups

You can also personalize content through marketing automation connectors, if you have Marketo installed on your website, for example. See examples in the following video tutorials.

 Video tutorial: [Personalizing content with Optimizely and the Eloqua database.](#)
(2:15 minutes)

 Video tutorial: [Personalizing content with Optimizely and HubSpot.](#) (2:34
minutes)

 Video tutorial: [Personalizing content with Optimizely and Marketo](#). (2:56 minutes)

Commerce-specific criteria

Optimizely Commerce provides custom visitor group criteria so you can personalize content based on product and order information. Personalization helps you to strategically sell exactly the right products to the right customers, instead of showing the same products to everyone.

Note: You need administration access rights to create and edit a visitor group. Existing visitor groups are available for editors in edit view.

To see available visitor groups, in the top menu, click **CMS > Visitor Groups**. Click **Create** to define a visitor group. Then add personalization criteria as desired.

Personalization examples

You can use Visitor Groups to determine which content is appropriate to show. If you use a CRM system with segments to guide your business practices, duplicate this segmentation in Optimizely Commerce via Visitor Groups. Then, create a special home page for each customer segment.

As another example, create visitor groups that place customers in vertical segments, such as service stations, car repair shops, spare parts dealers, and so on. If product data is maintained in Optimizely, different customers should see different product descriptions. A retail customer (service station) could see primarily commercial data about a product, while an end-user (car repair shop) would see technical details about the same product. So, you can use visitor groups to optimize the user experience by meeting the unique needs of each customer.

Commerce-specific criteria

These criteria are available by default in an Optimizely Commerce installation, in addition to the CMS-specific criteria. See also: Visitor groups in the CMS Administrator User Guide.

- **Customer properties.** Personalize content based on age or geographic location:
 - **Date of Birth.** Format mm/dd/yyyy.
 - **Customer group.** Select **Customer**, **Partner**, or **Distributor**.
 - **Registration source.** Enter the source of registration.
 - **Country.** Select a country from the list.
 - **Region code.** Select a region code based on the address region in addresses.
 - **Address postal code.** Select a postal code from the list (based on state selected).
 - **State.** Select a state from the list.

Note: You can select only one property type with a related value for a criterion, but you can define several customer properties criteria for a visitor group.

- **Market.** Personalize content based on the market to which a visitor website belongs.
 - **Market.** Select a market.
- **Recent Orders.** Personalize content based how often a customer orders:
 - **Order times.** Select the number of times an order is placed.
 - **Number of days.** Select the number of days over which the number of orders must occur. For example, 4 times in the last 2 days.
- **Product in cart or wish list.** Identify customers that have placed a product of a certain type or brand in their cart or wish list.
 - **Specified product code.** Enter the desired product code.
 - **Product from a specified category.** Select the desired product category.

- **Product has a specified property and value.** Enter the desired product property and value, such as *brand* and *Sony*.

Note: You can select only one property type with a related value for a criterion, but you can define several add several criteria of the type **Products in Cart or Wish List** to a visitor group.

- **Total spent.** Personalize content for visitors who spent a specified amount of money (in a specified currency) on the site in the last number of days.
 - **Spent at least.** Select amount and currency.
 - **Number of days.** Select the number of days.

How visitor groups are used

When creating a campaign, you can limit it to members of selected visitor groups.

Optimizely Digital Experience Platform

The Optimizely Digital Experience Platform 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

About Optimizely

At Optimizely, we're on a mission to help people unlock their digital potential. We equip teams with the tools and insights they need to experiment in new and novel ways. Now, companies can operate with data-driven confidence to create hyper-personalized experiences. Building sophisticated solutions has never been simpler. Learn how we unleash new limits at [optimizely.com](https://www.optimizely.com).

www.optimizely.com

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