Episerver Product Recommendations

User Guide

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Episerver Personalization

> **Note:** The Personalization product suite is part of the Episerver Customer-Centric Digital Experience Platform (DXP). Each product in the suite requires a specific license key, installation, and service setup. After service on-boarding, you can access it from your web browser. See Episerver World for technical information.

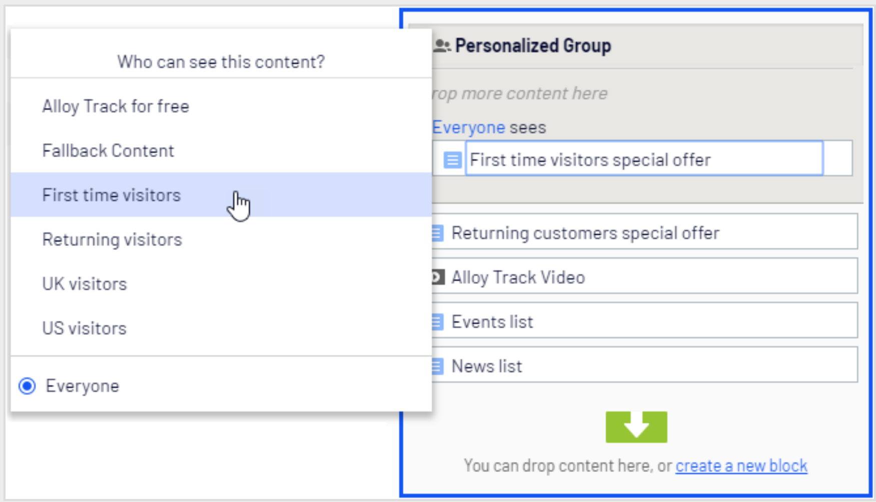
Personalization lets you individualize content displayed to online visitors or sent to them by email, instead of showing the same content to everyone.

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	Personalizing content is a powerful way to increase visitor engagement. For example, you can provide articles of specific interest on a news site. Content recommendations in Episerver are based on real-time website interaction, visitor profiles, and intelligent algorithms to suggest topics of interest.
Product Recommendations	**Note**: Product Recommendations is part of the Episerver Digital Experience platform. It requires a specific installation and license. Product Recommendations let you create and configure a merchandising campaign with personalized product recommendations. Whether you display your products on the web or on a mobile device, Episerver optimizes the ranking for every visitor, including behavioral data and merchandising strategies.

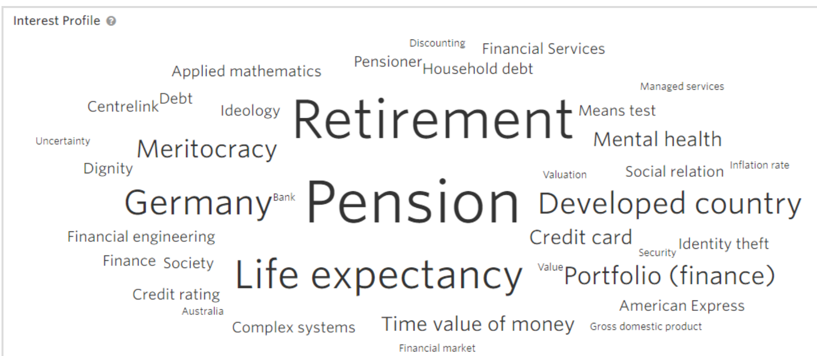
Personalization Product	Description
Email Recommendations	**Note**: Email Product Recommendations and Email Content Recommendations are part of the . It requires a specific installation and license. Email Product Recommendations let you include personalized product recommendations in any email, including cart abandonment and retargeting emails. Email Content Recommendations let you include personalized content recommendations in any email, including retargeting emails.
Triggered Messages	**Note**: Triggered Messages are part of the . It requires a specific installation and license. Triggered Messages let you work with behavioral triggers to detect on-site behaviors and act on them through automated, personalized emails.
Visitor Intelligence	**Note**: Visitor Intelligence is part of the . It requires a specific installation and license. Episerver Visitor Intelligence (formerly Episerver Insight) lets you track and save data about your website visitors, for example, 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	**Note**: for the Personalization Portal is available only if you have the features for Product Recommendations, Email Product Recommendations, Email Content Recommendations, and Triggered Messages 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, and Triggered Messages. Features include automatic product recommendations online and through email. See also Administering the Personalization Portal.
Promote	Episerver Promote is available for Episerver customers who use a non-Episerver platform. Episerver platform customers can use similar functionality

Personalization Product	Description
	built into Episerver CMS. See the Episerver Promote User Guide (in PDF format only). See also the CMS Personalization guide.
Visitor Groups	Visitor groups are a simple way to work with content personalization in Episerver, 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. See Visitor groups. 

Content Recommendations

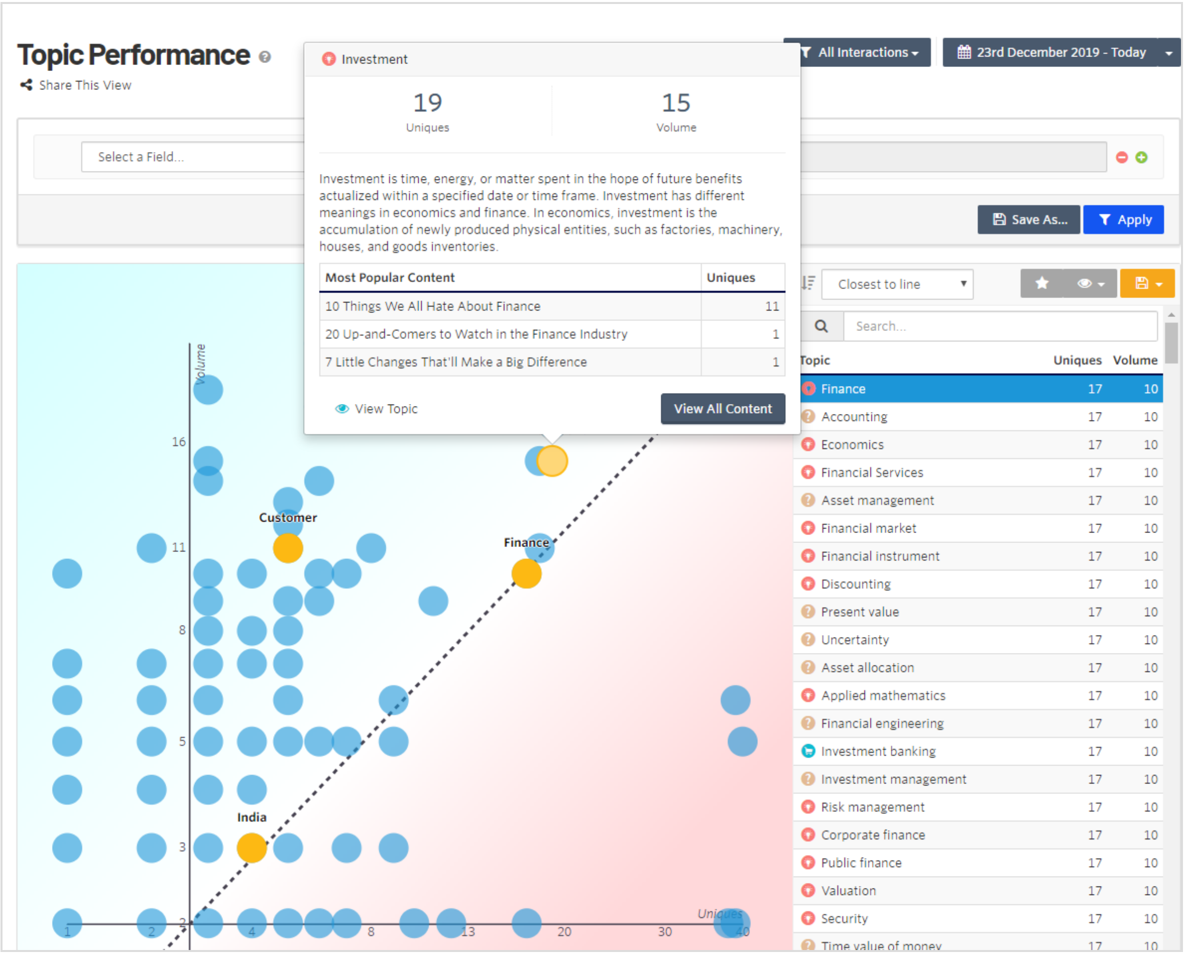
Content Recommendations anonymously tracks visitor activity on a website to build a profiles for each visitor. Analysis of a unique profile lets you deliver the most relevant content to each visitor.

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.

[[[Undefined variable Variables.Advance]]] 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.



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 [[[Undefined variable Variables.Advance]]] 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 [[[Undefined variable Variables.Advance]]] 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.

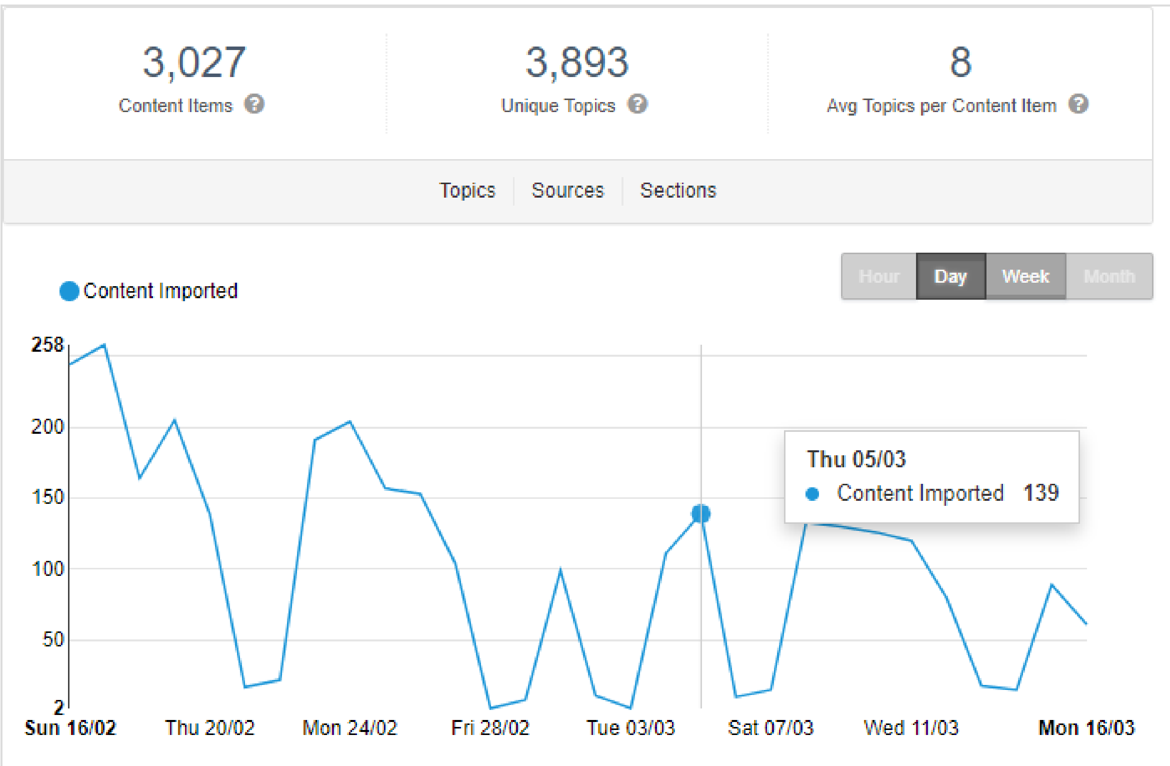
- **Volume**. The number of times a unique visitor views pages on your website during a session.

Content Dashboard

The Content Dashboard shows an overview of the following:

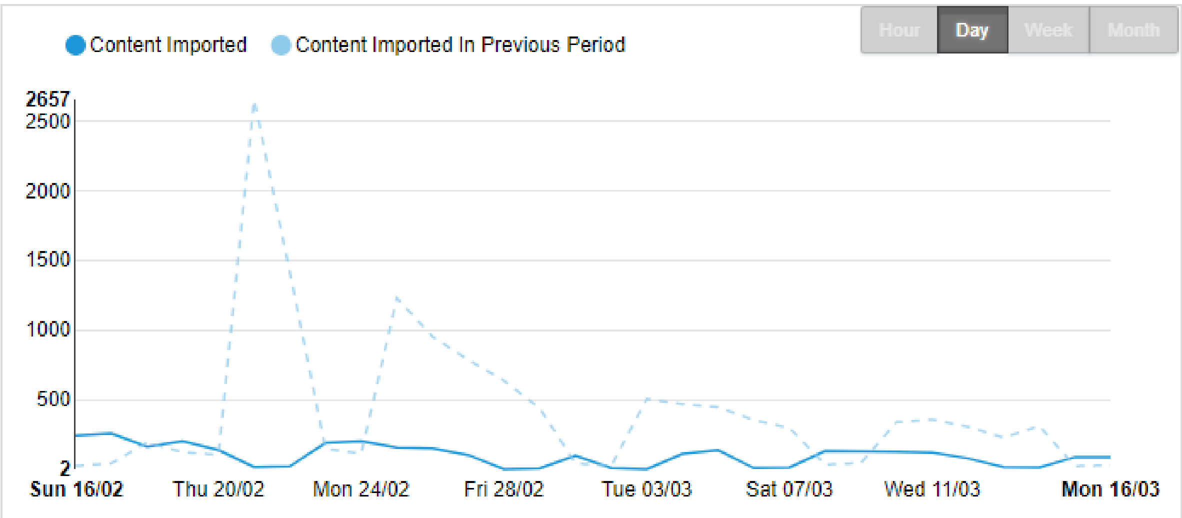
- the number of Content items that Content Recommendations processed
- the number of unique topics (generated by NLP)
- the average number of topics per content item

The graph shows when content was imported and ingested.

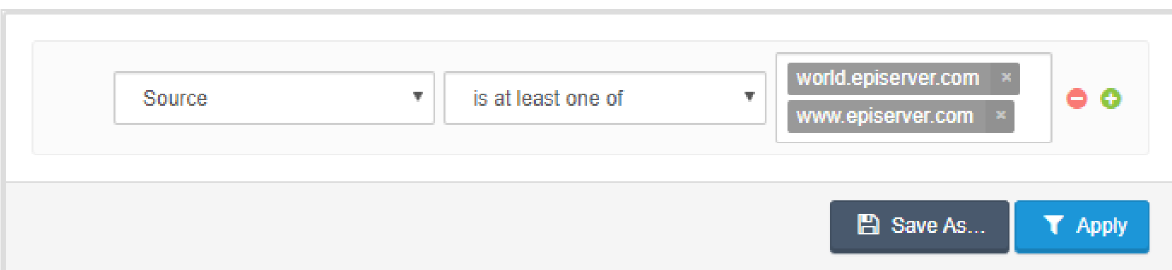


> Note: Date labels are in dd/mm format.

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.

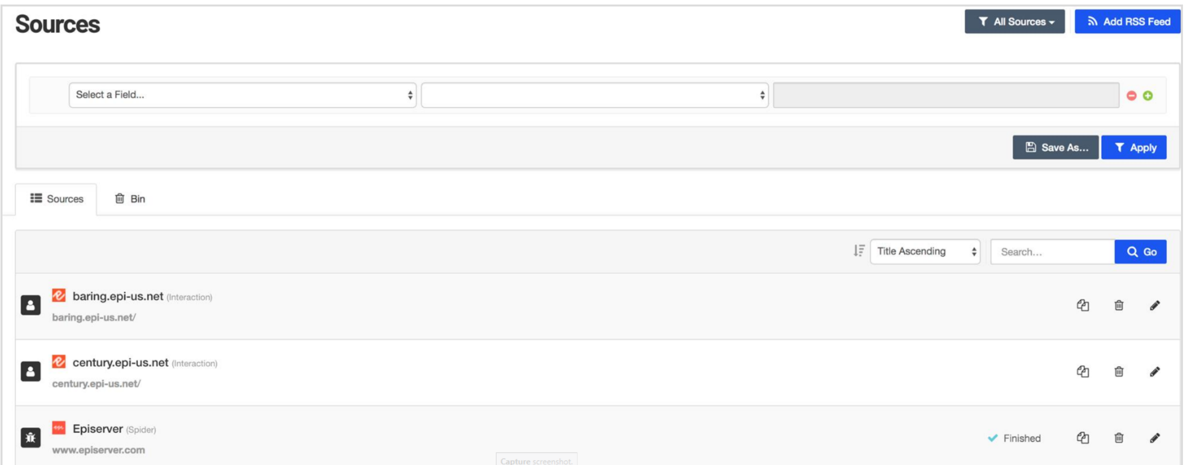
Sources	Content
1. moseycapital.epi-uk.net	6

- 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%

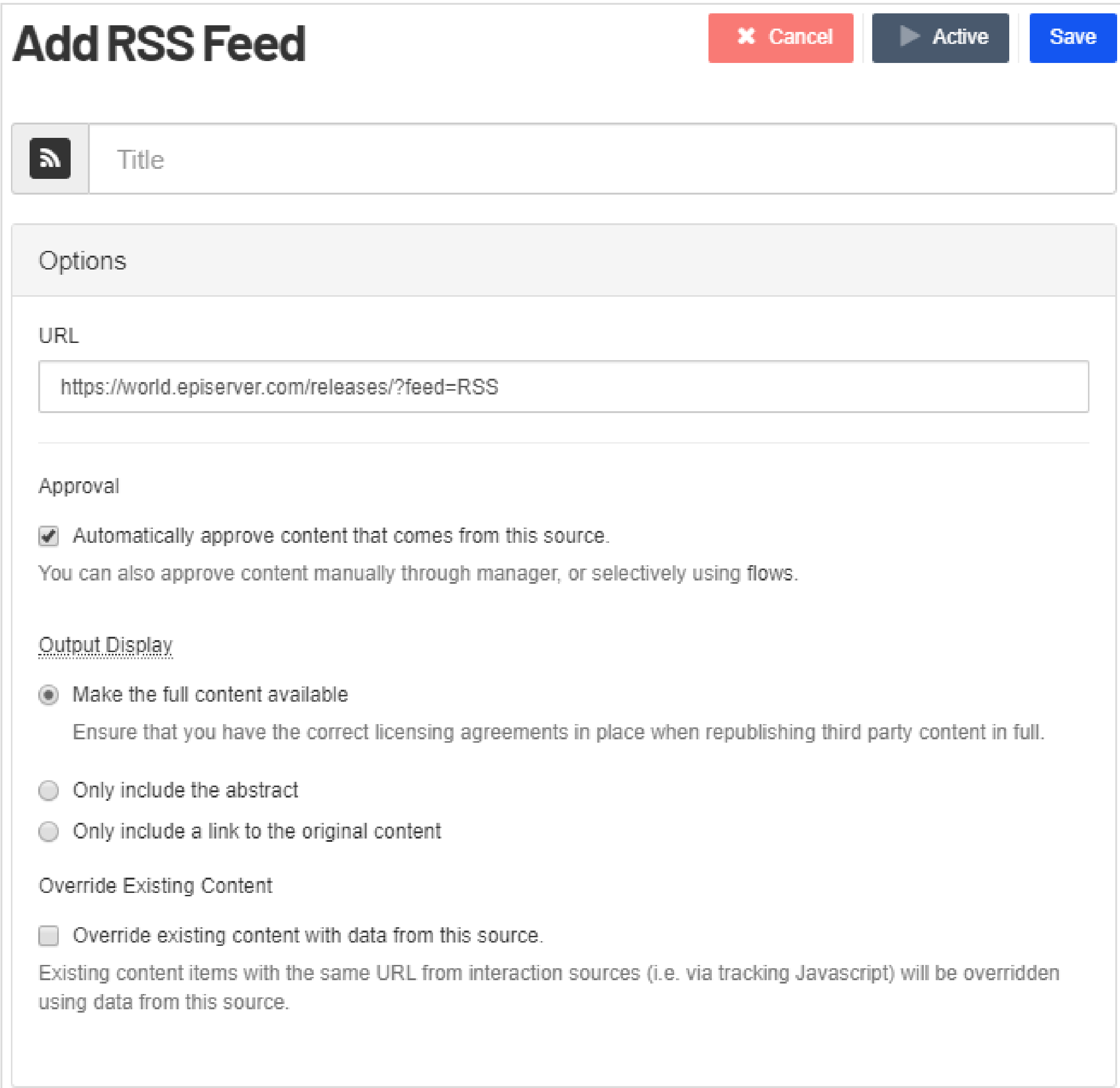
Sources

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.



Adding an RSS feed

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

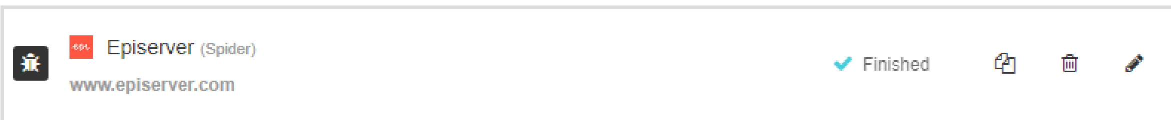


- **Title**. Enter the name of the source from which you want to extract content.
- **Approval**. Enable to automatically approve content from the source.

> 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.

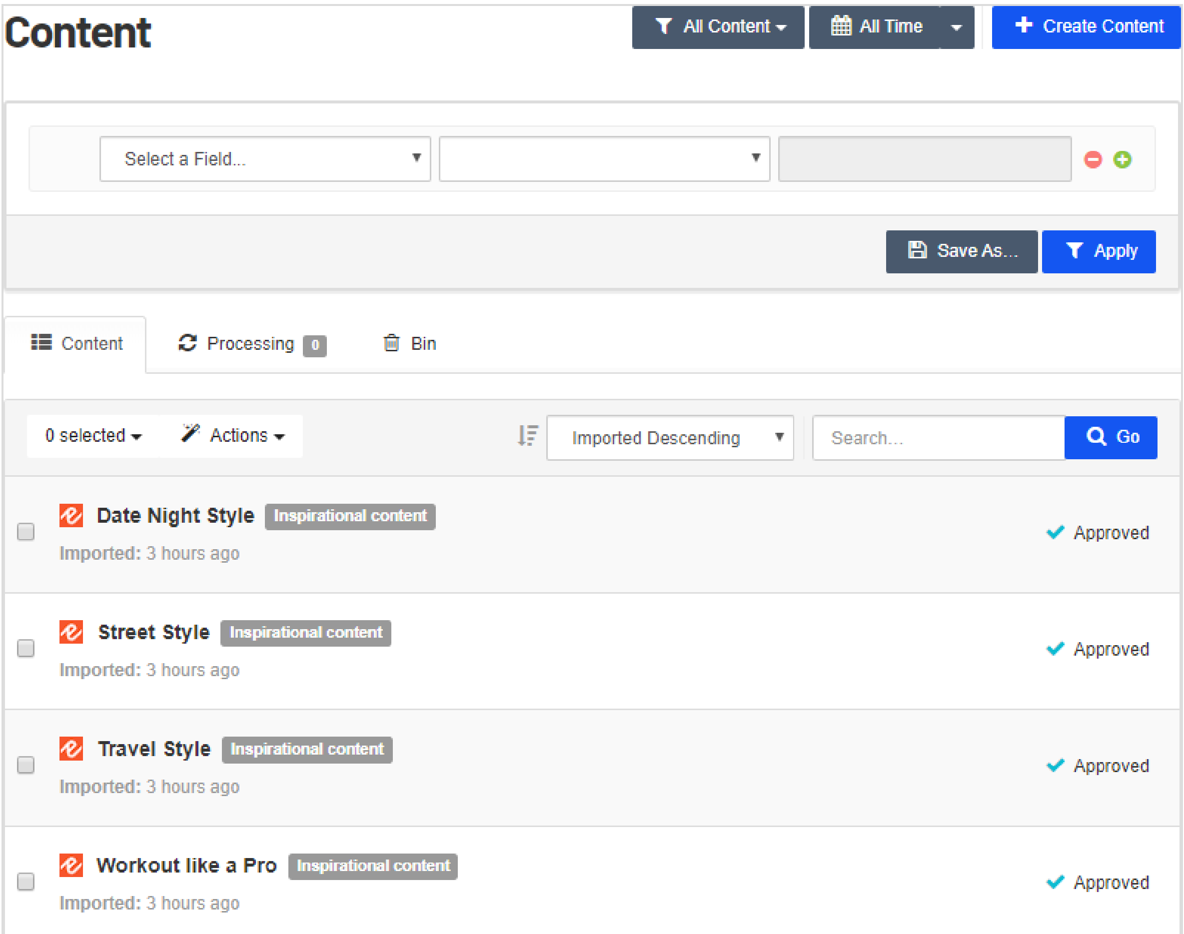
When you click **Save**, the source is added to the list.



Content List

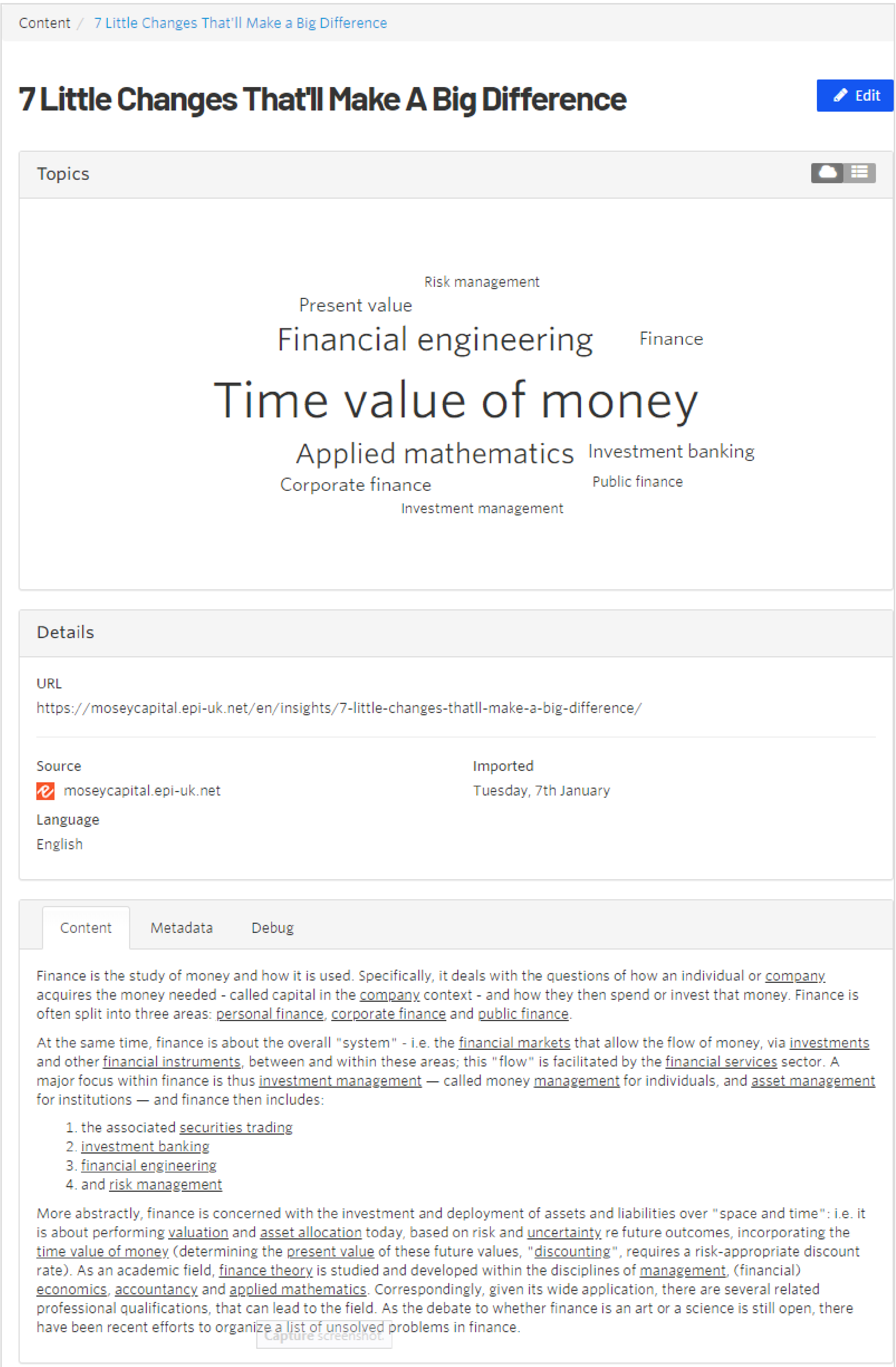
The **Content List** view shows each content item that is successfully processed for tracking. The content list also displays associated sections next to content items, which helps you create filters to refine sections.

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.



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
moseycapital.epi-uk.net
Imported
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.
Capture screenshot

Reprocessing content

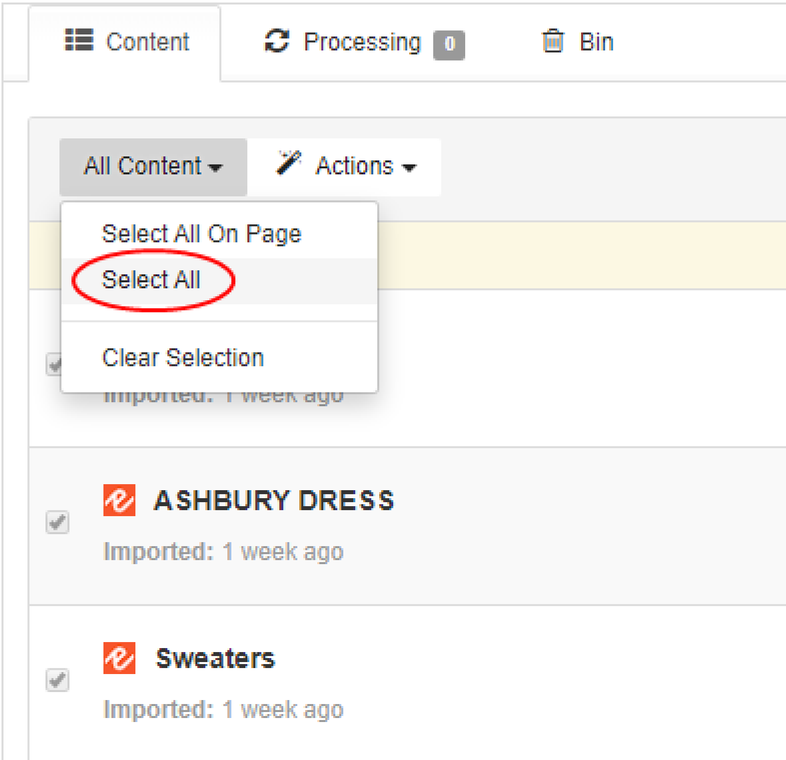
You can reprocess content in the following situations:

- 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).

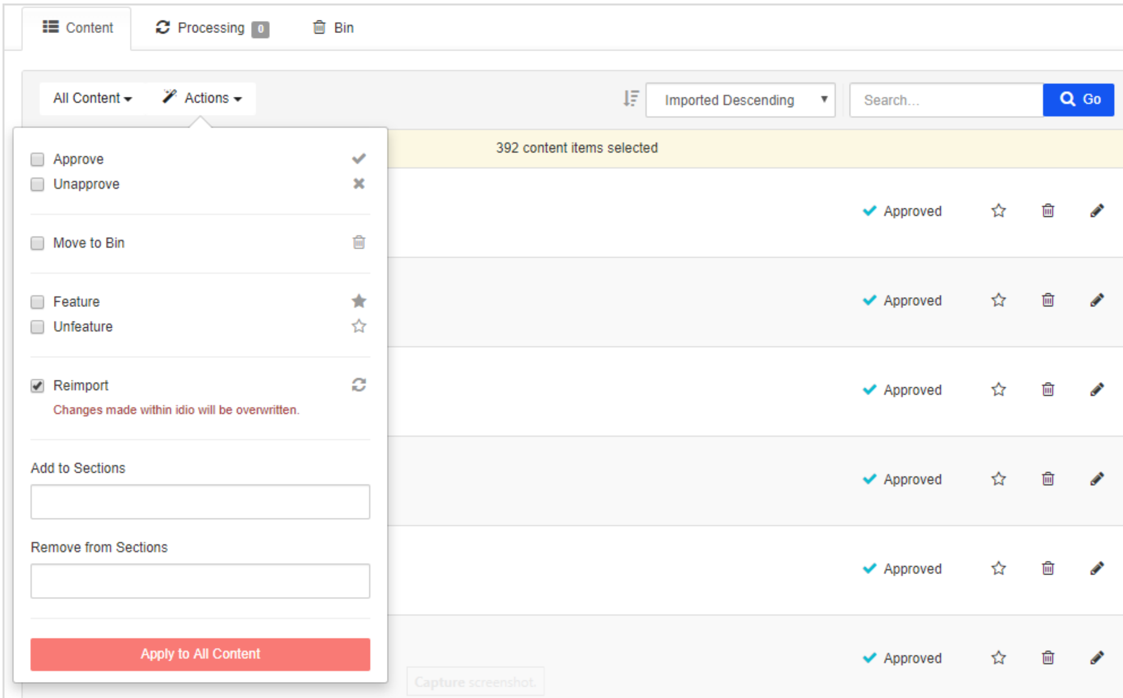
> Warning: Reprocessing content overwrites changes that might have been made manually to the content and does not re-evaluate flows. If the content no longer exists—for example, it was recently deleted—reprocessing automatically removes it.

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**.

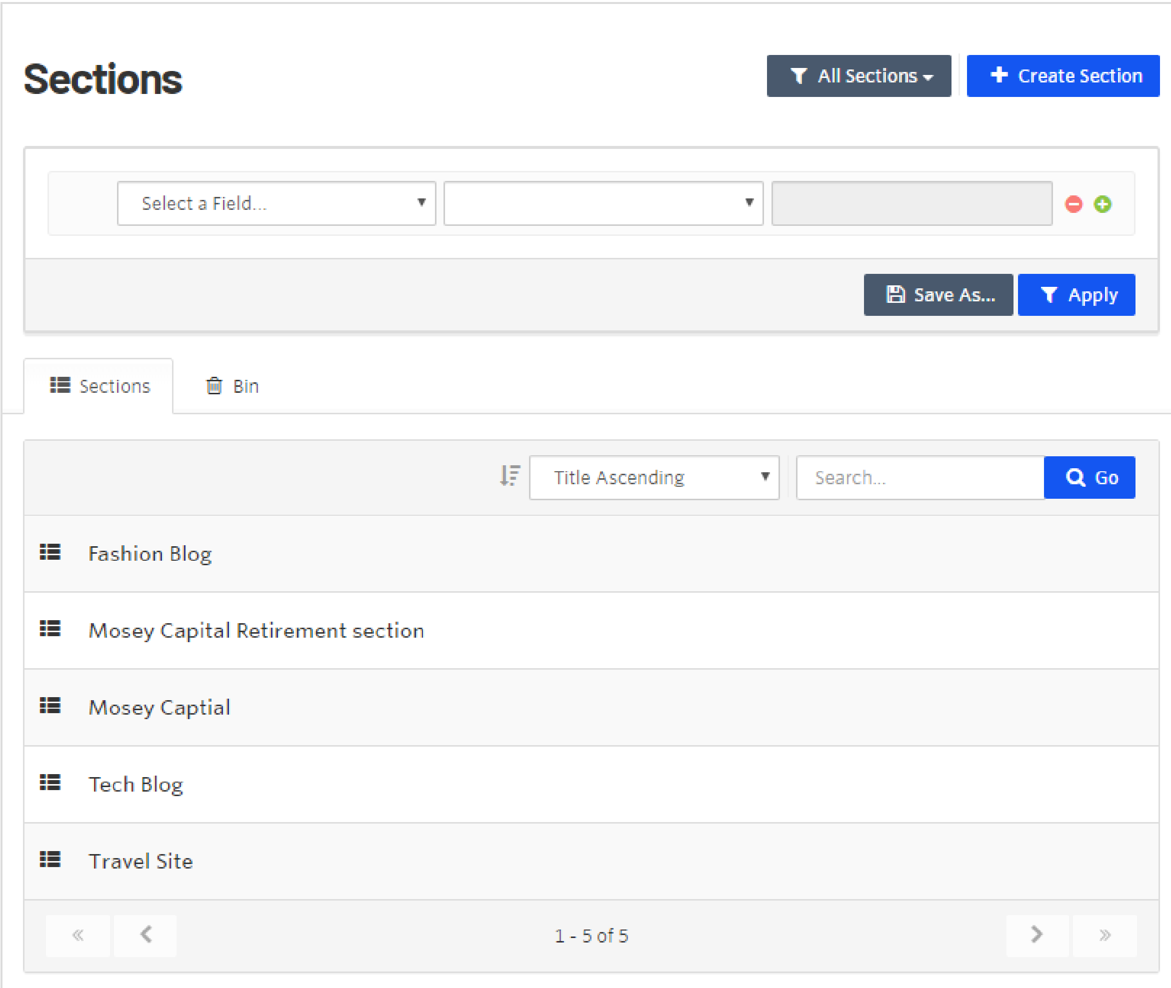


Sections

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.



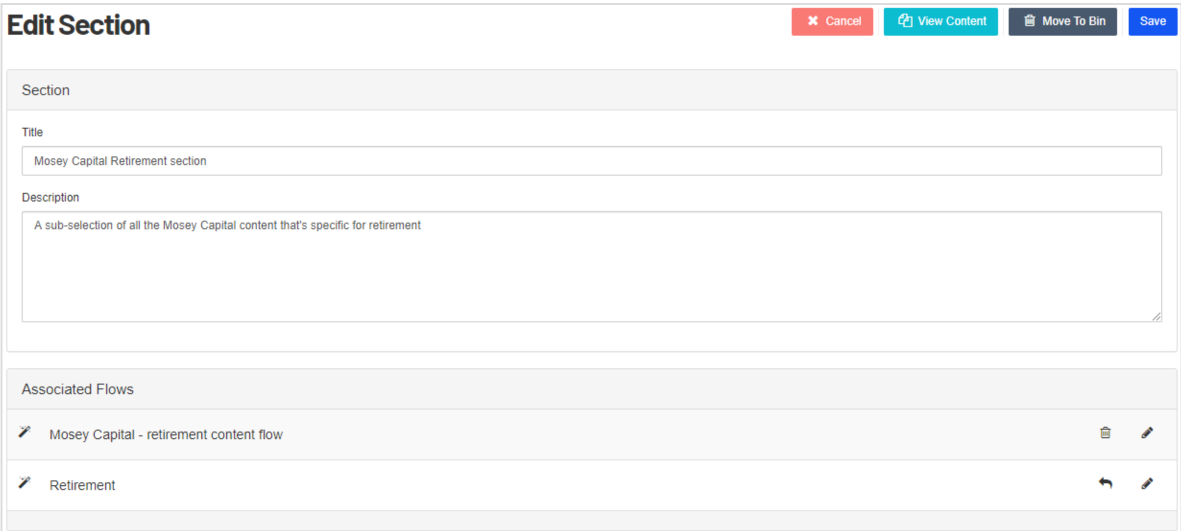
Click a section name in the list to edit its attributes.

Deleting a section

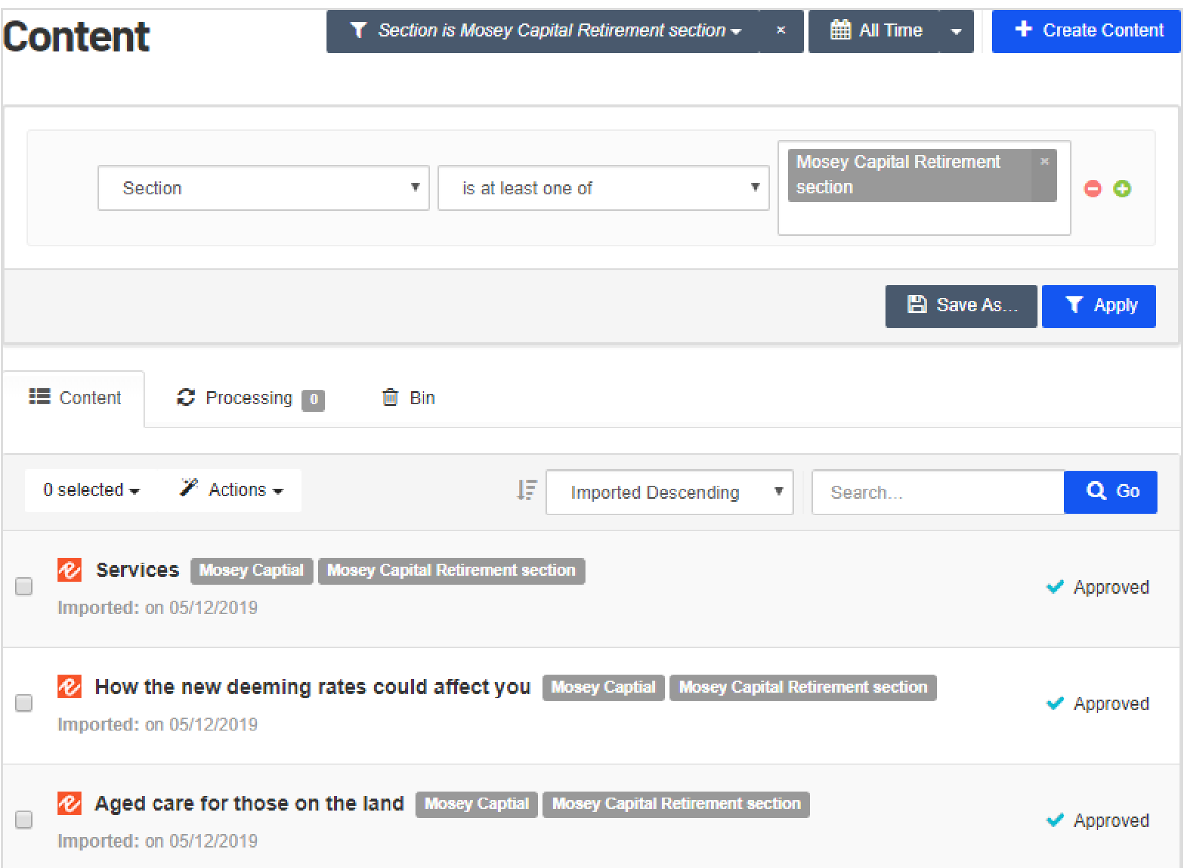
> Note: Before moving a section to the bin, you should remove associated flows. This is because a content item that belongs to a removed section retains that section's label. For example, *content1* is in *section1*. If you remove *section1*, *content1* is still part of *section1*.

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.

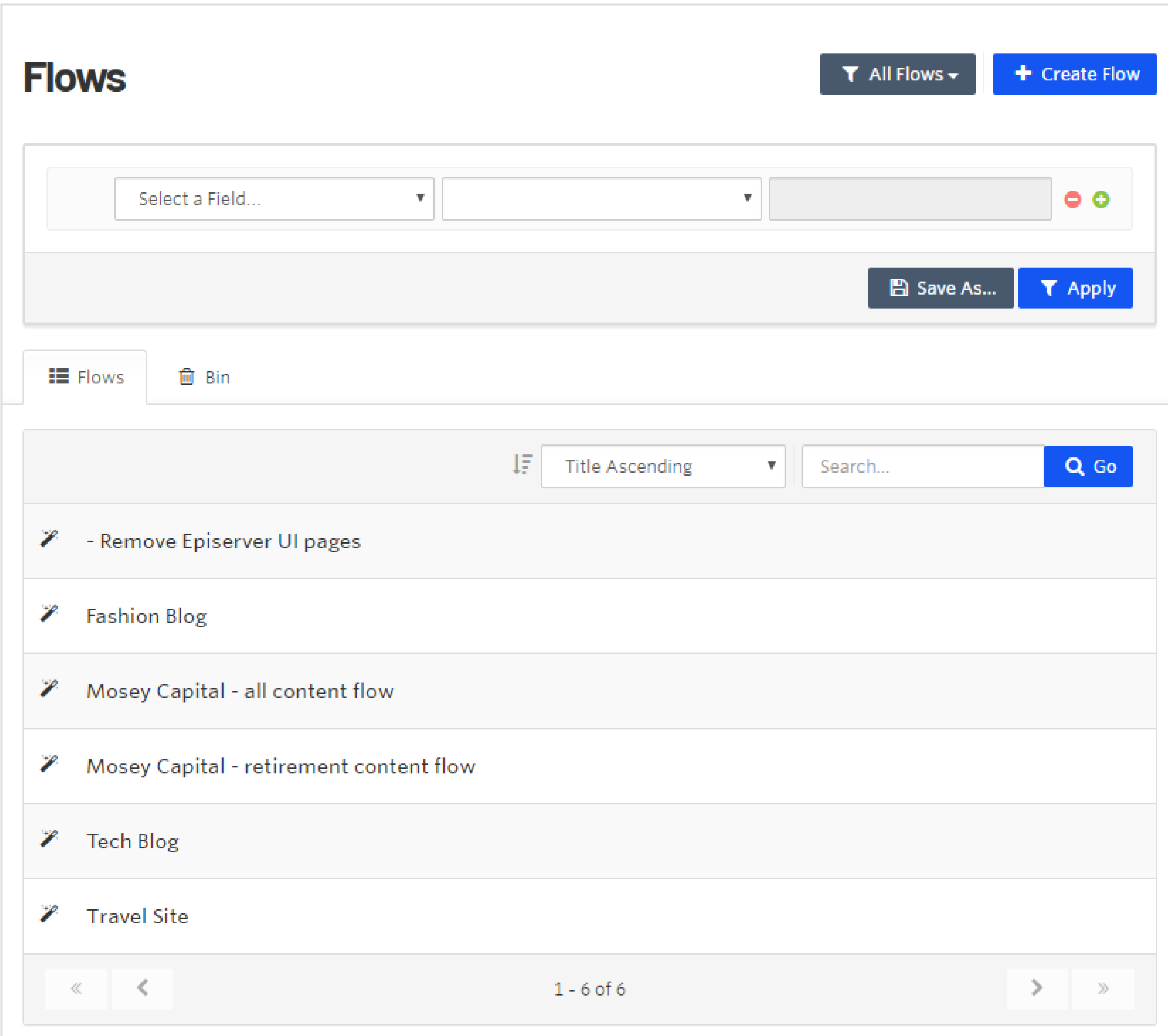


Click **View Content** in the edit view to see the content that the section groups.

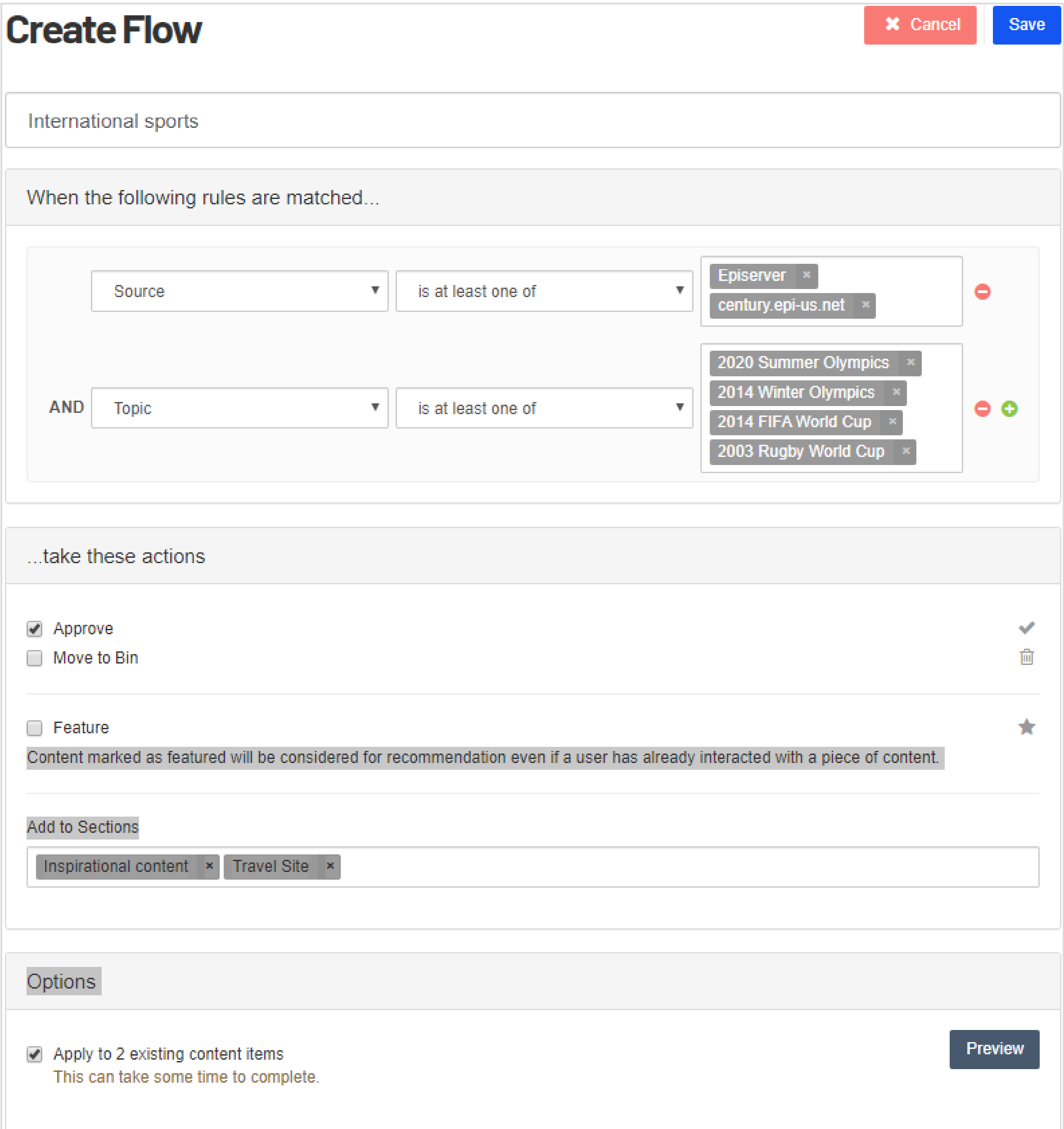


Flows

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



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.



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

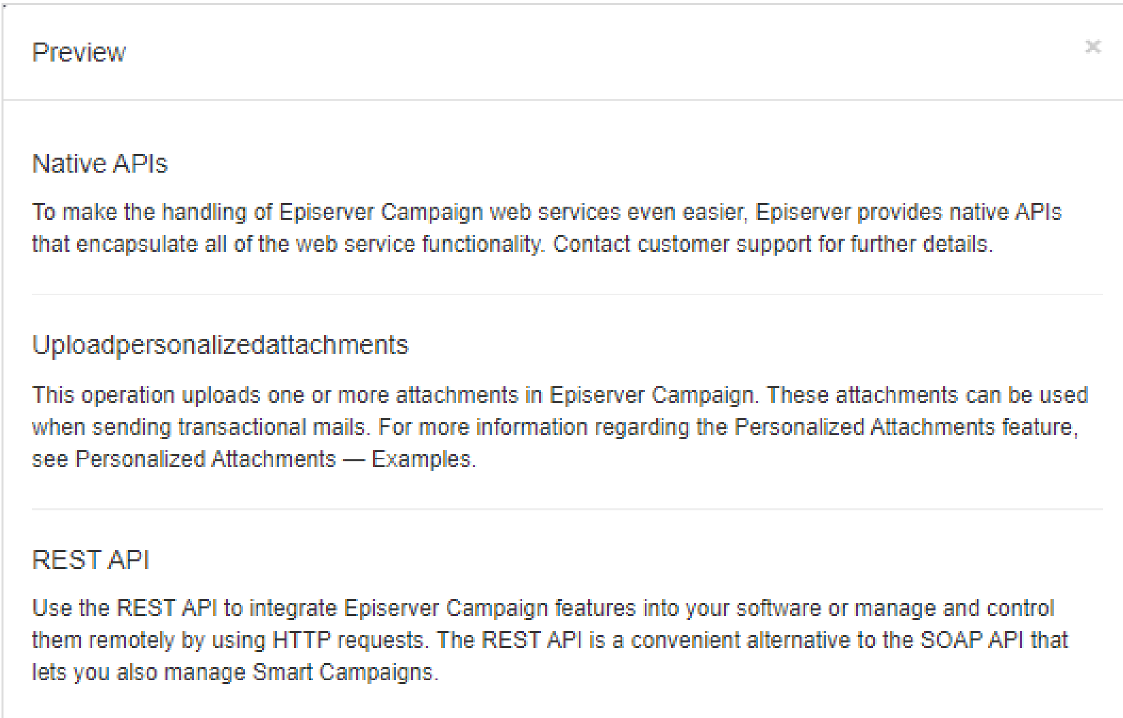
> move content out of a section, which can be accomplished only manually through the content list, using filters and bulk actions.

- **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.

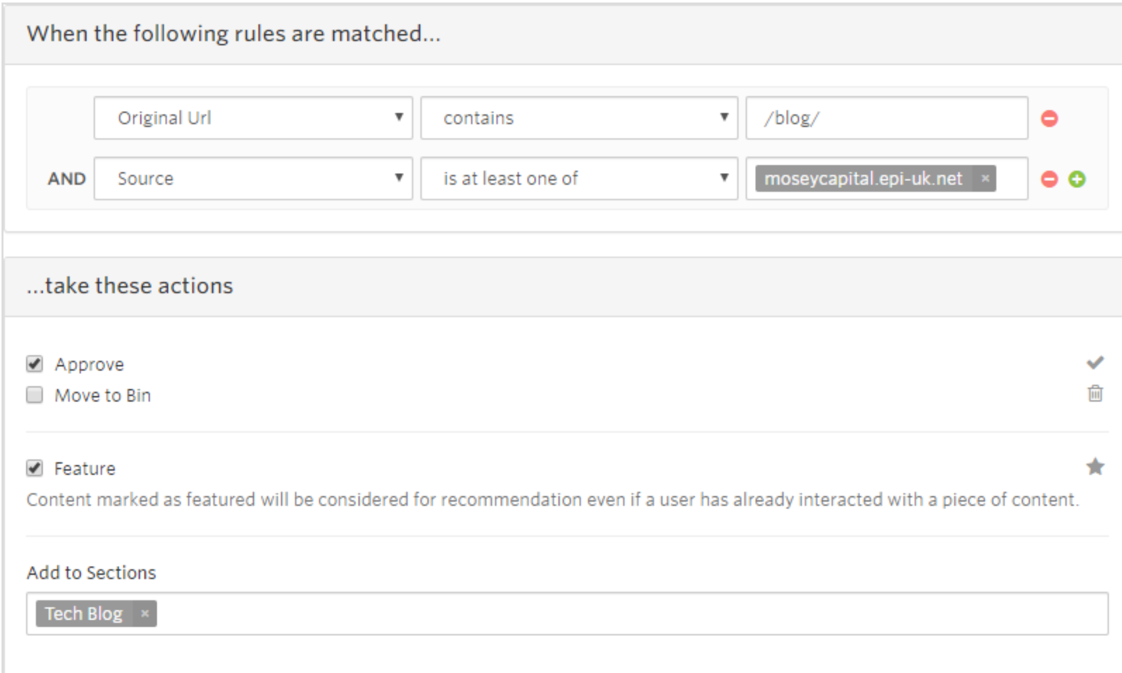


Making changes to an existing flow

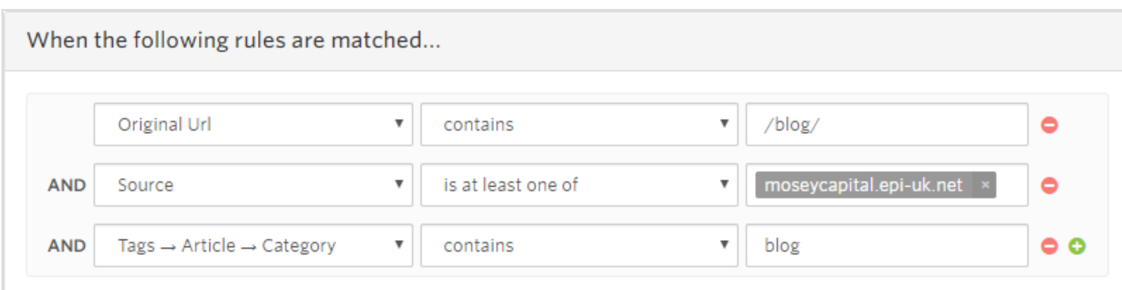
A *section* is a group of content. A content item can exist in multiple sections.

You can set up a flow as follows:

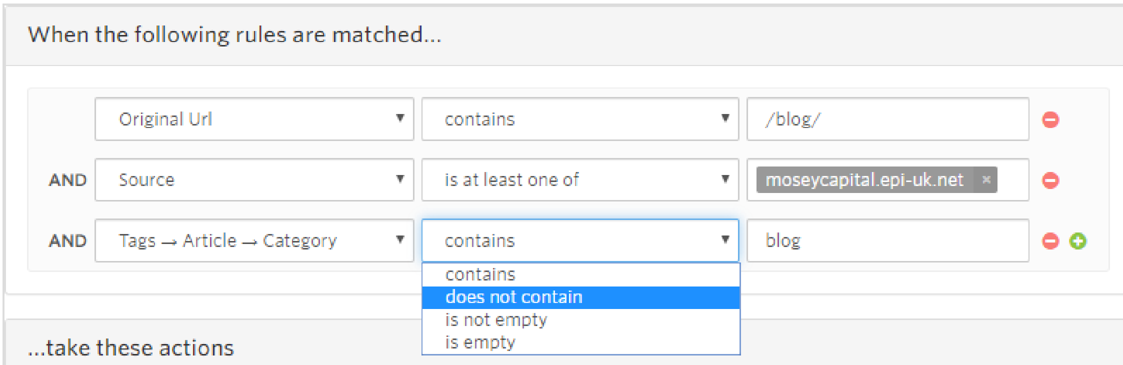
1. Set up the original flow as follows:



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

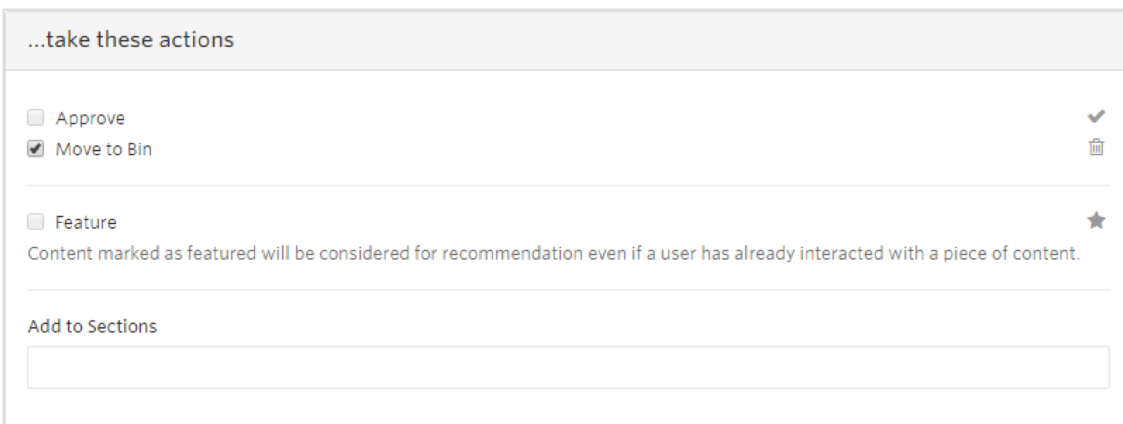


3. Filter the **Content** view by flipping the condition.



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.

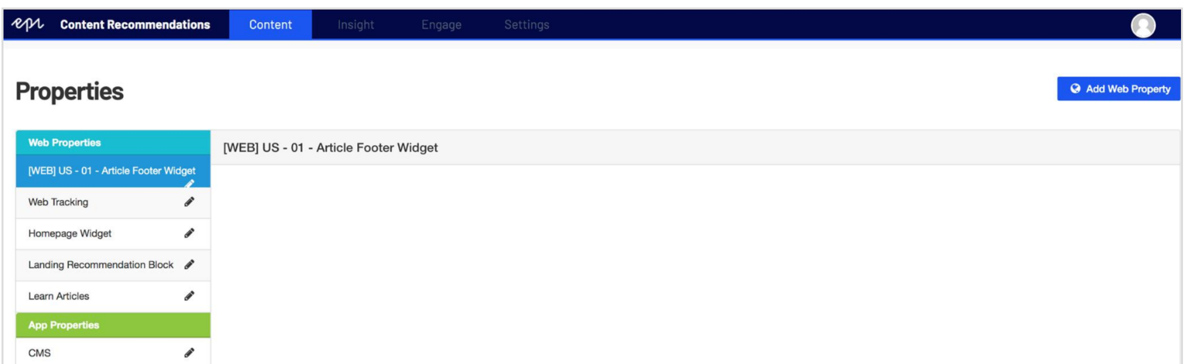
- A section has content it should not have, so you update the flow to be more granular and click **Apply to X existing content items**.
    - This only modifies a section moving forward, not retroactively. So **Apply to X content items** does nothing because the content is already in the section.
- A 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

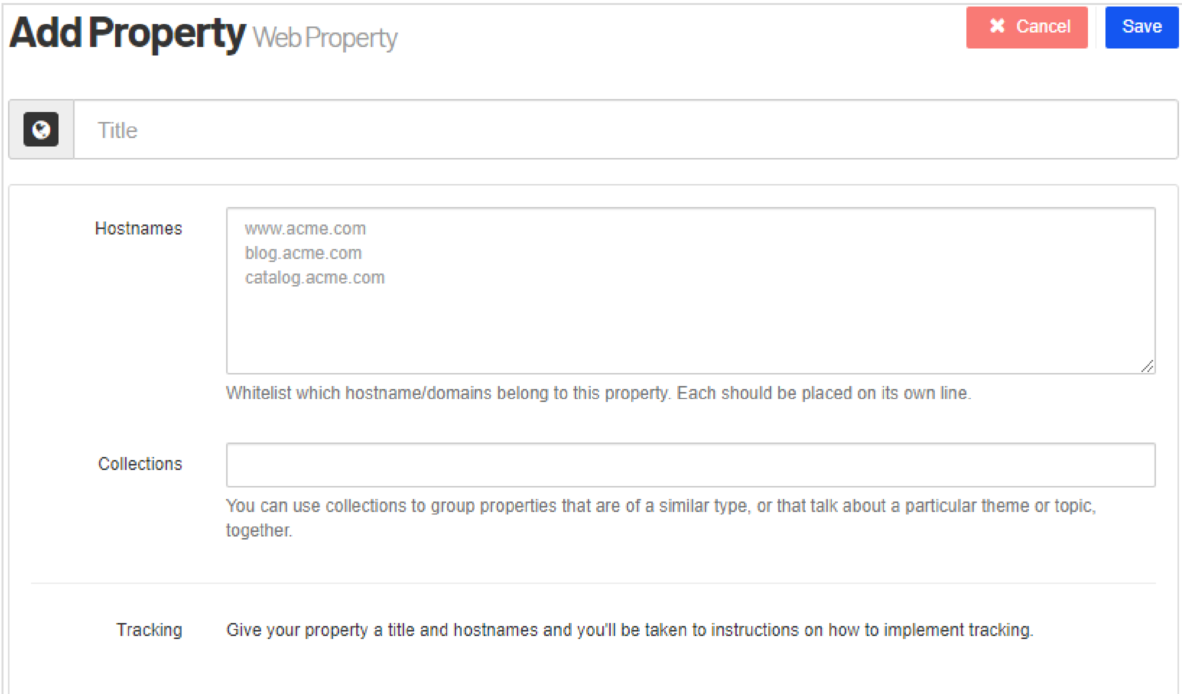
The **Properties** view lets you create unique tracking scripts for your site.

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



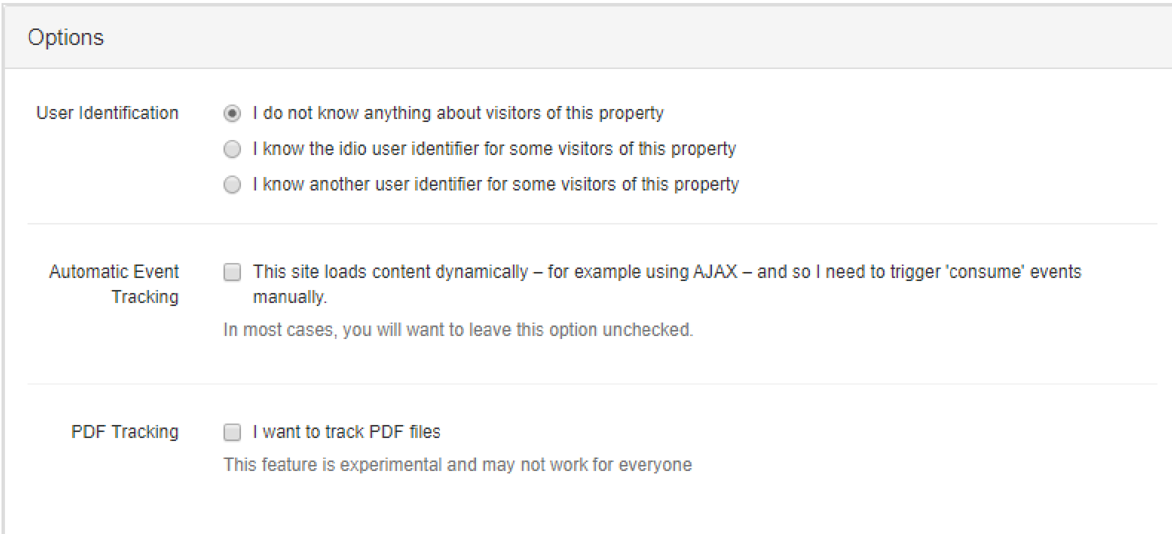
You can add a web property.

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

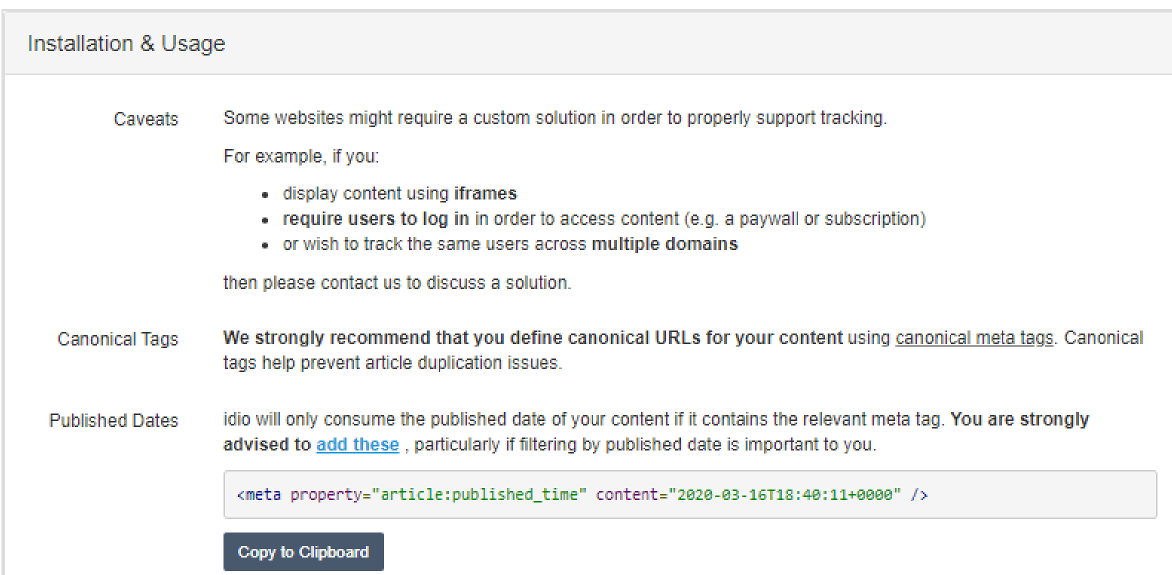


- **Title**. Enter the name of the new property.
- **Hostnames**. Enter domains and sub-domains you want to whitelist for content ingestion. Only domains or sub-domains on this list are ingested. Place each name on its own line.
- **Collections**. Enter a new collection (that is, a theme or topic such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



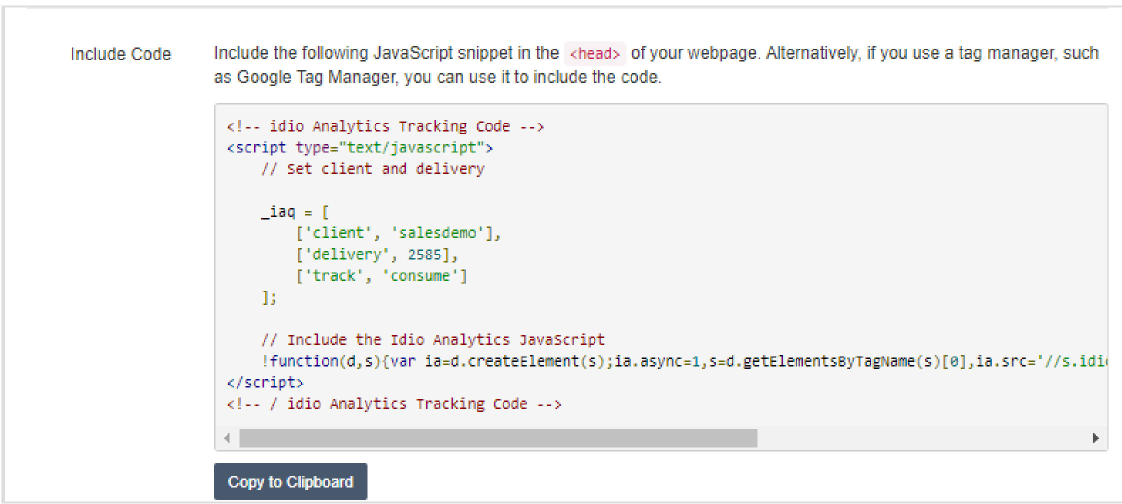
- **User identification**. Select the option that best describes the visitors of this property. In most cases, select the default option.
- **Automatic Event Tracking**. Enable only if your site loads content dynamically.
- **PDF Tracking. Experimental**. Enable to track PDF files.



- **Caveats**. Contact Episerver for a custom solution.
- **Canonical Tags**. See Consolidate duplicate URLs.
- **Published Dates**. Add article meta tags to your webpage. See https://ogp.me/#type_article.

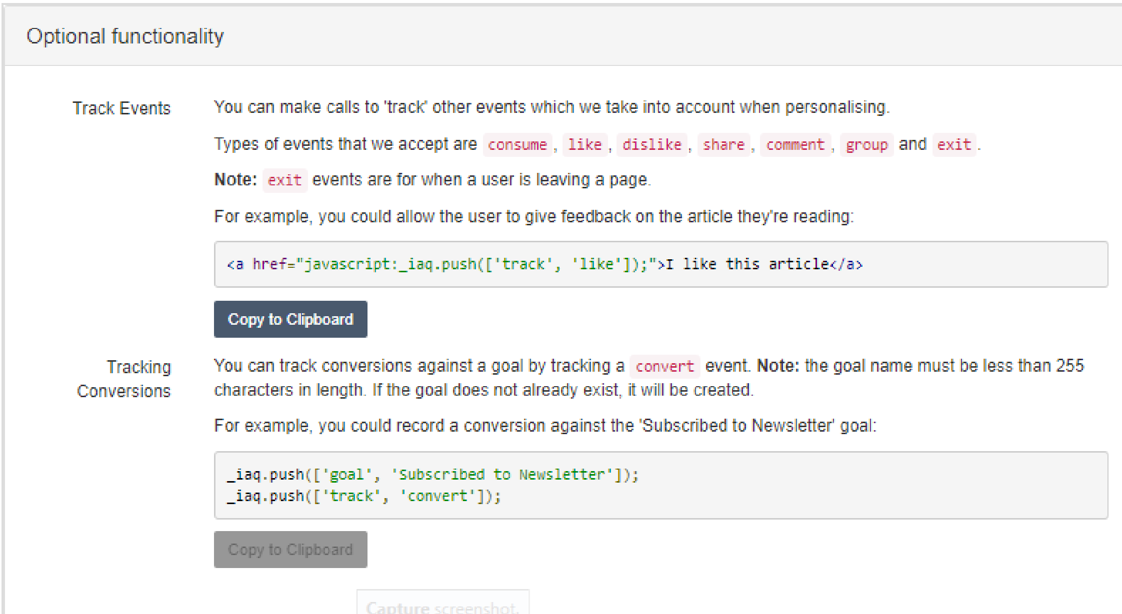
- **Include code**. Add the following JavaScript code in the <head> tags.

> 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.



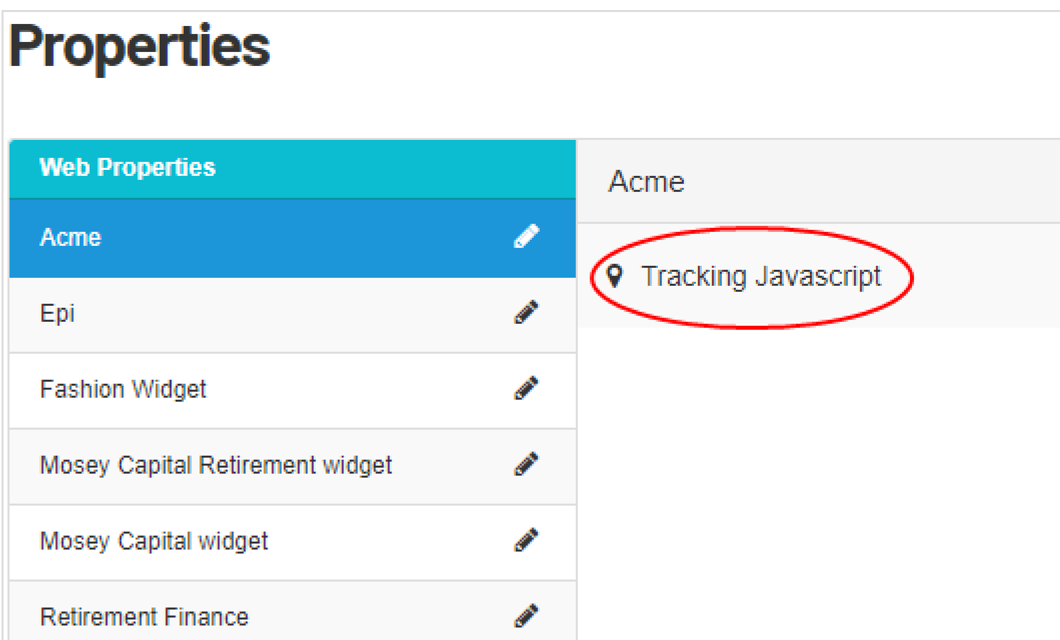
- **Track Events**. Optionally, add event calls (**consume**, **like**, **dislike**, **share**, **comment**, **group**, and **exit**) to the webpage to track other personalization events.
- **Tracking Conversions**. Optionally, add a **convert** event to the webpage to track conversions.

> Note: [[[Undefined variable Variables.Advance]]] cannot ingest granular conversion-level data, such as Order ID, price, and so on.



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

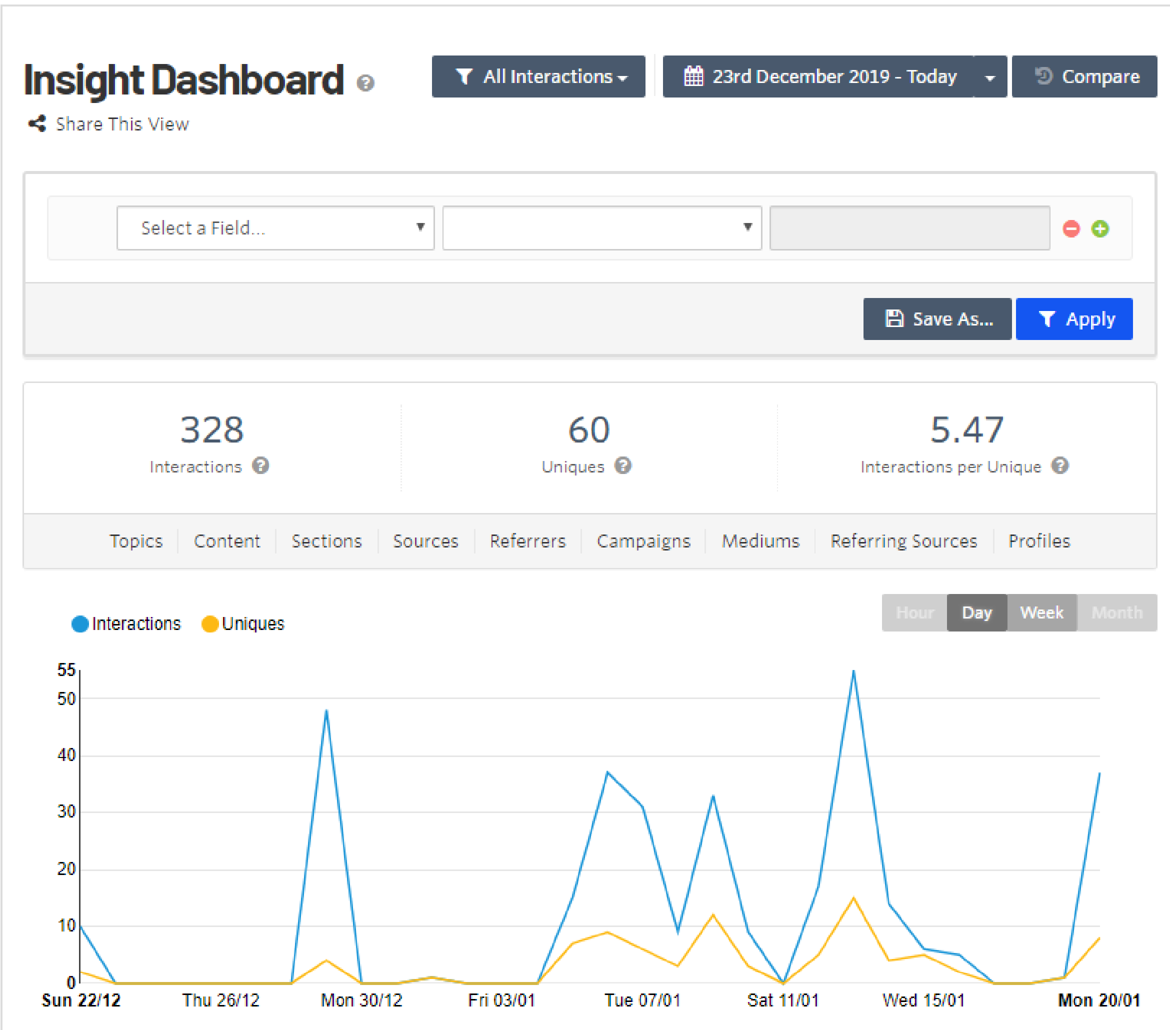
To return to the **Web Property** view, click **Tracking JavaScript** in the right pane. Click **Edit** (the pencil icon) to update settings, such as for updating or removing hostnames.



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.

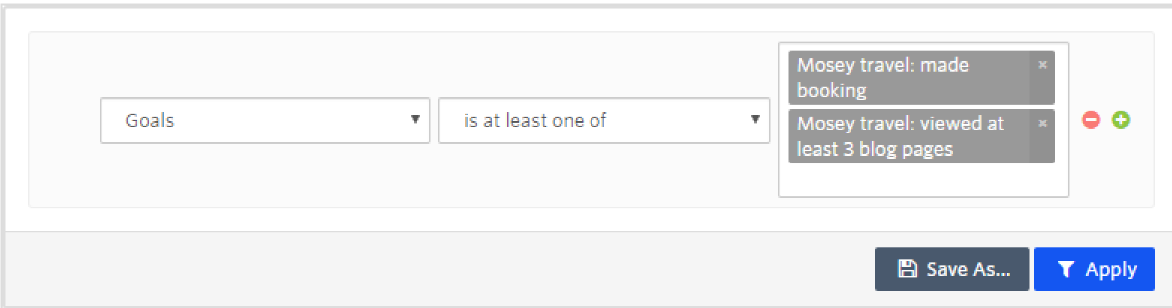
You can filter and save Interactions views for frequent use, and share a view with a linked URL. Saved filters are shown in the **All Interactions** menu.



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

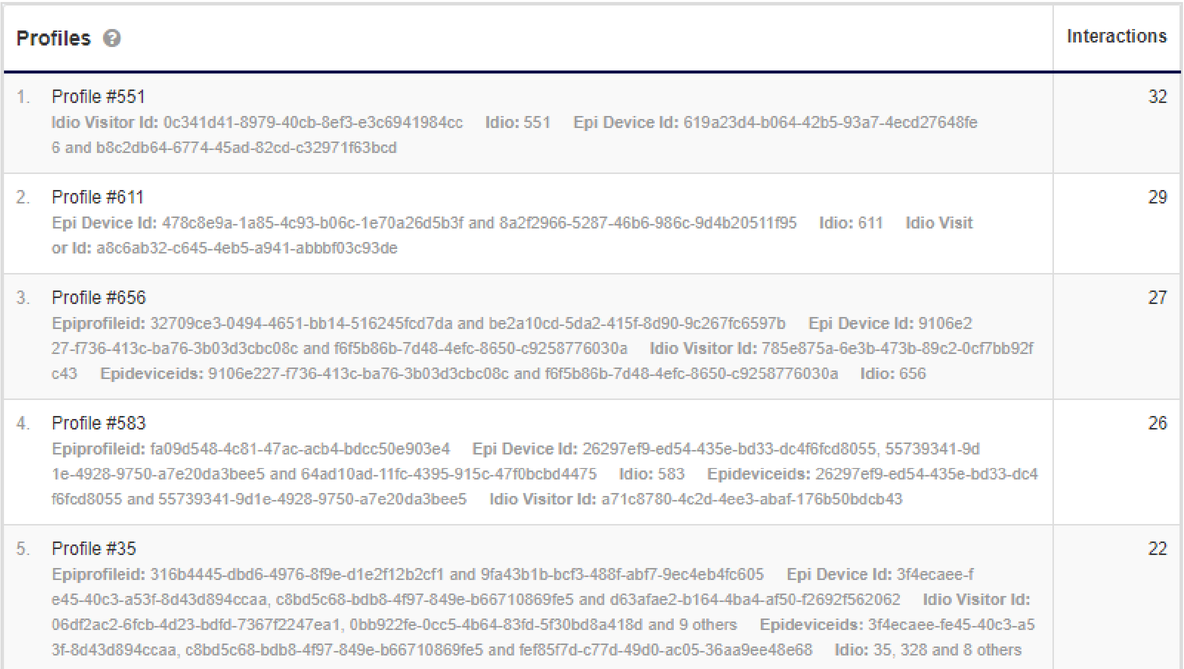
Referring Campaigns	Interactions	Uniques	IPU
1. newsignup	5	1	5.00

Referring Mediums
No Data Available

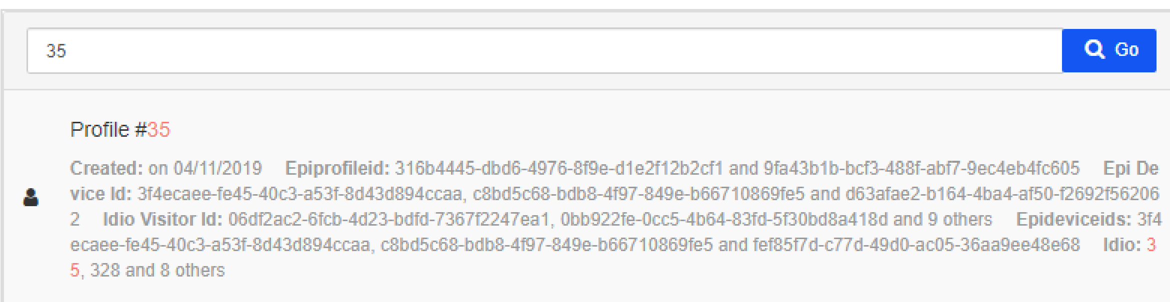
Referring Sources
No Data Available

Profiles

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



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.

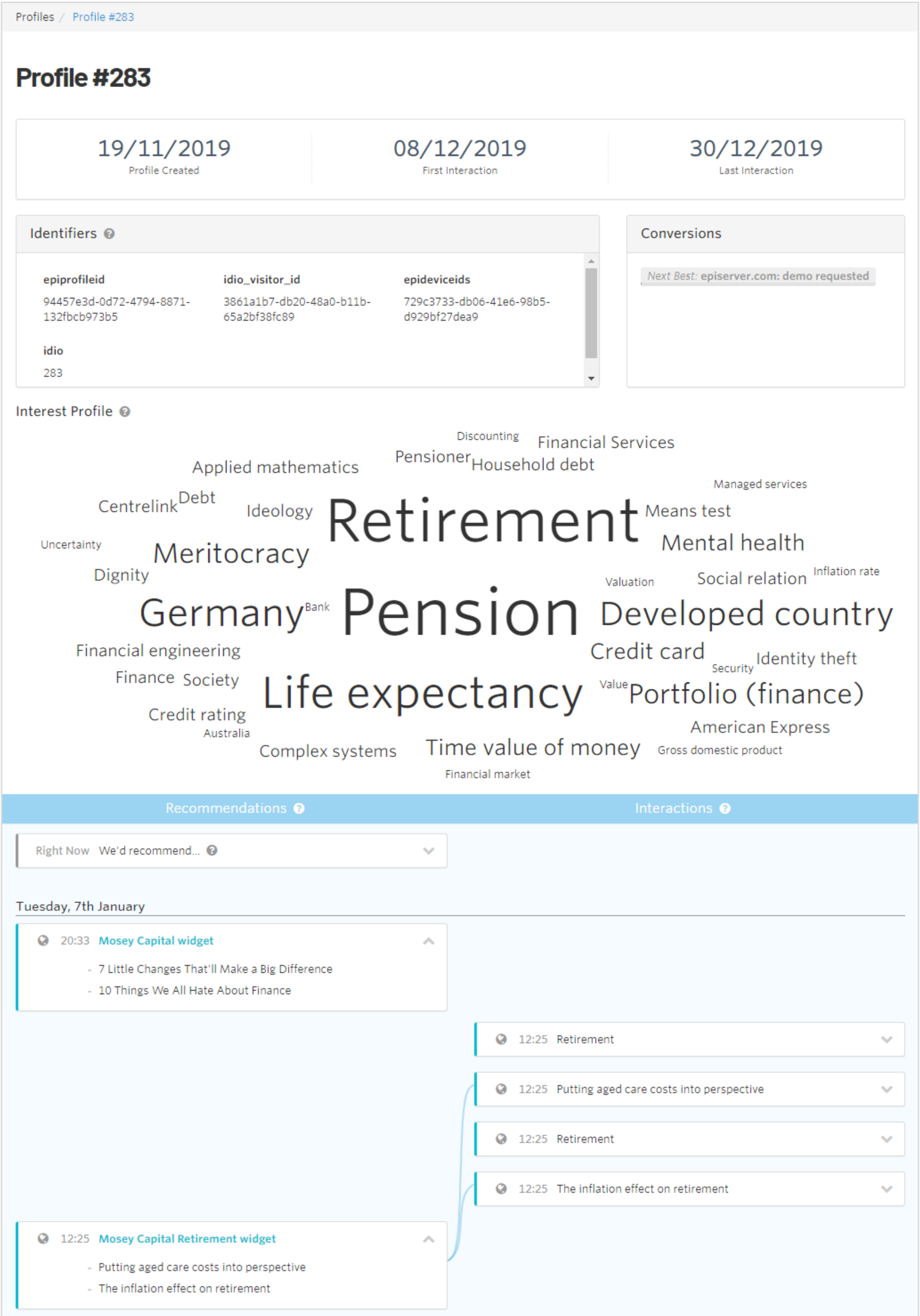


The **Profiles** view lets you examine details about a visitor profile. Data includes:

- **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.

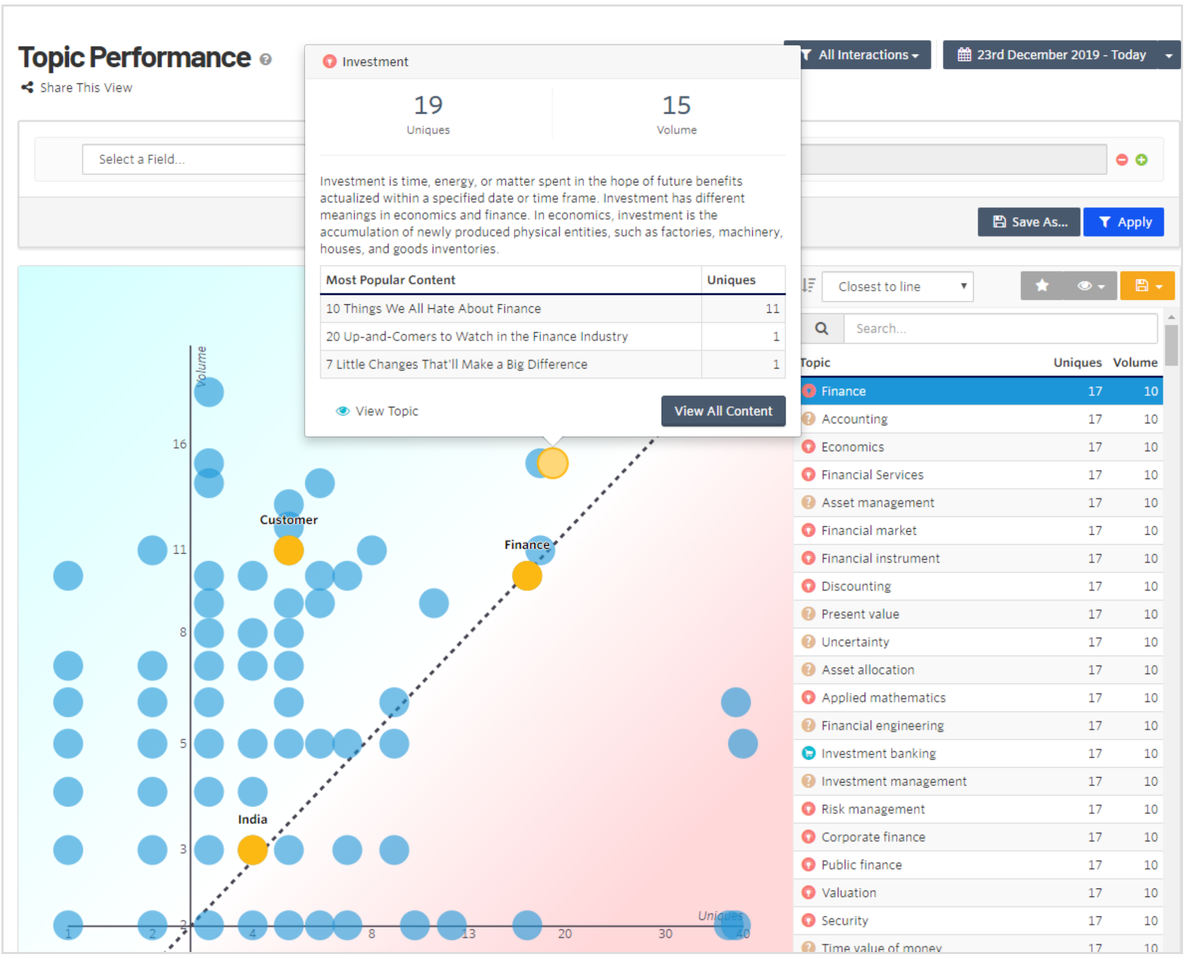
> Note: Date labels are in a dd/mm format.



Profiles / Profile #283
Profile #283
19/11/2019
Profile Created
08/12/2019
First Interaction
30/12/2019
Last Interaction
Identifiers
epiprofileid
94457e3d-0d72-4794-8871-132fbcb973b5
idio_visitor_id
3861a1b7-db20-48a0-b11b-65a2bf38fc89
epideviceids
729c3733-db06-41e6-98b5-d929bf27dea9
idio
283
Conversions
Next Best: episerver.com: demo requested
Interest Profile
Retirement
Pension
Germany
Developed country
Life expectancy
Portfolio (finance)
Meritocracy
Mental health
Time value of money
Recommendations
Interactions
Right Now We'd recommend...
Tuesday, 7th January
20:33 Mosey Capital widget
7 Little Changes That'll Make a Big Difference
10 Things We All Hate About Finance
12:25 Retirement
12:25 Putting aged care costs into perspective
12:25 Retirement
12:25 The inflation effect on retirement
12:25 Mosey Capital Retirement widget
Putting aged care costs into perspective
The inflation effect on retirement

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.

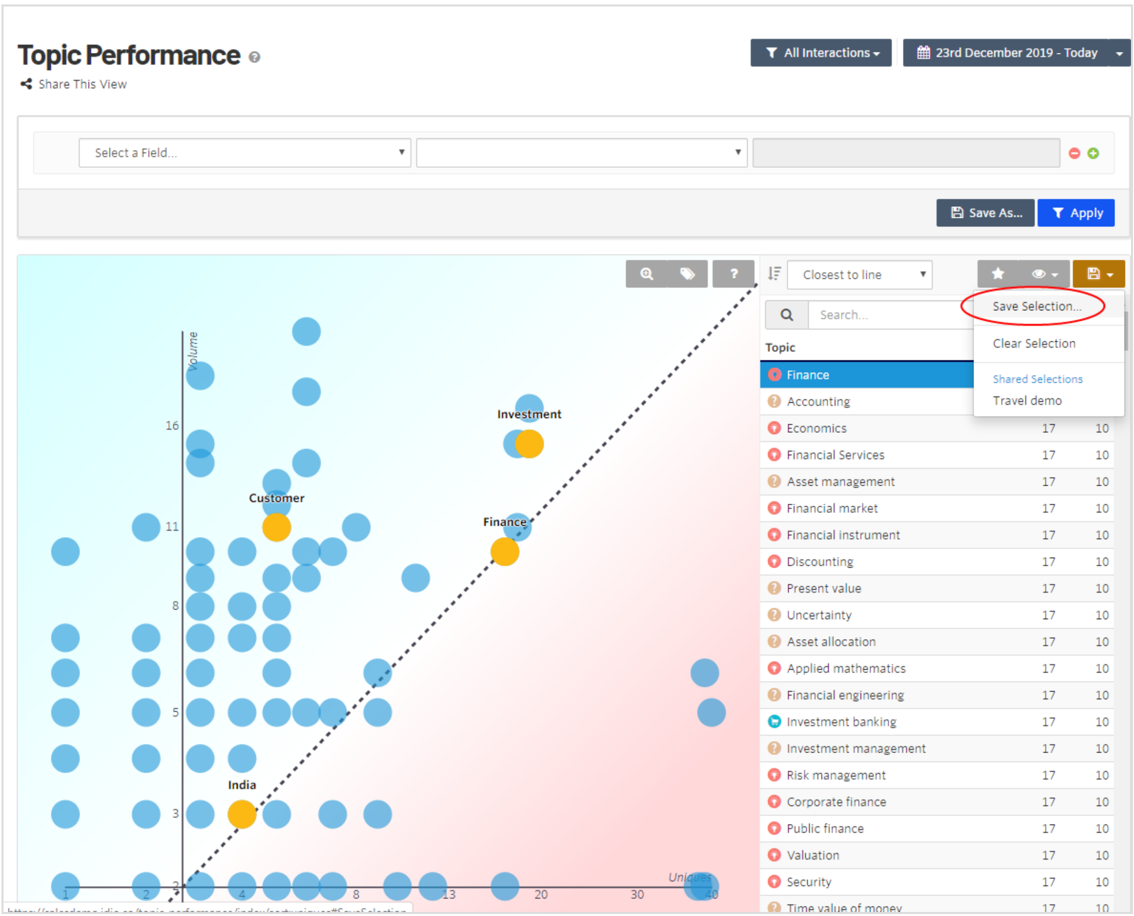


- Yellow dots show topics in the current topic selection that you identified as relevant.
- Blue dots show topics in your content that are not as relevant to your topic selection.
- The Y axis represents the total number of content pieces that contain a particular topic.

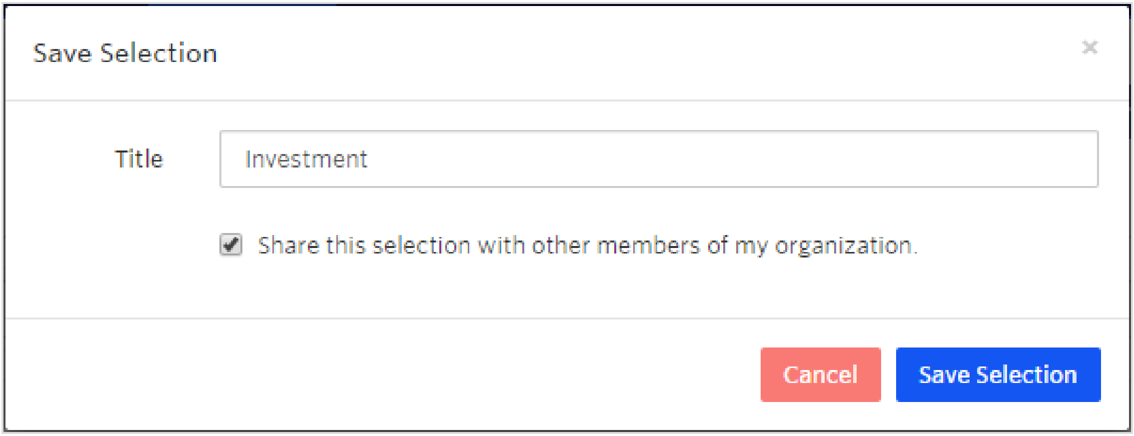
- The X axis represents the number of unique visitors that interacted with content that contains a topic.
- The diagonal dotted line represents the ideal amount of content per the number of unique interactions.
- Topics above the dotted line are saturated (meaning you have plenty of content about the 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

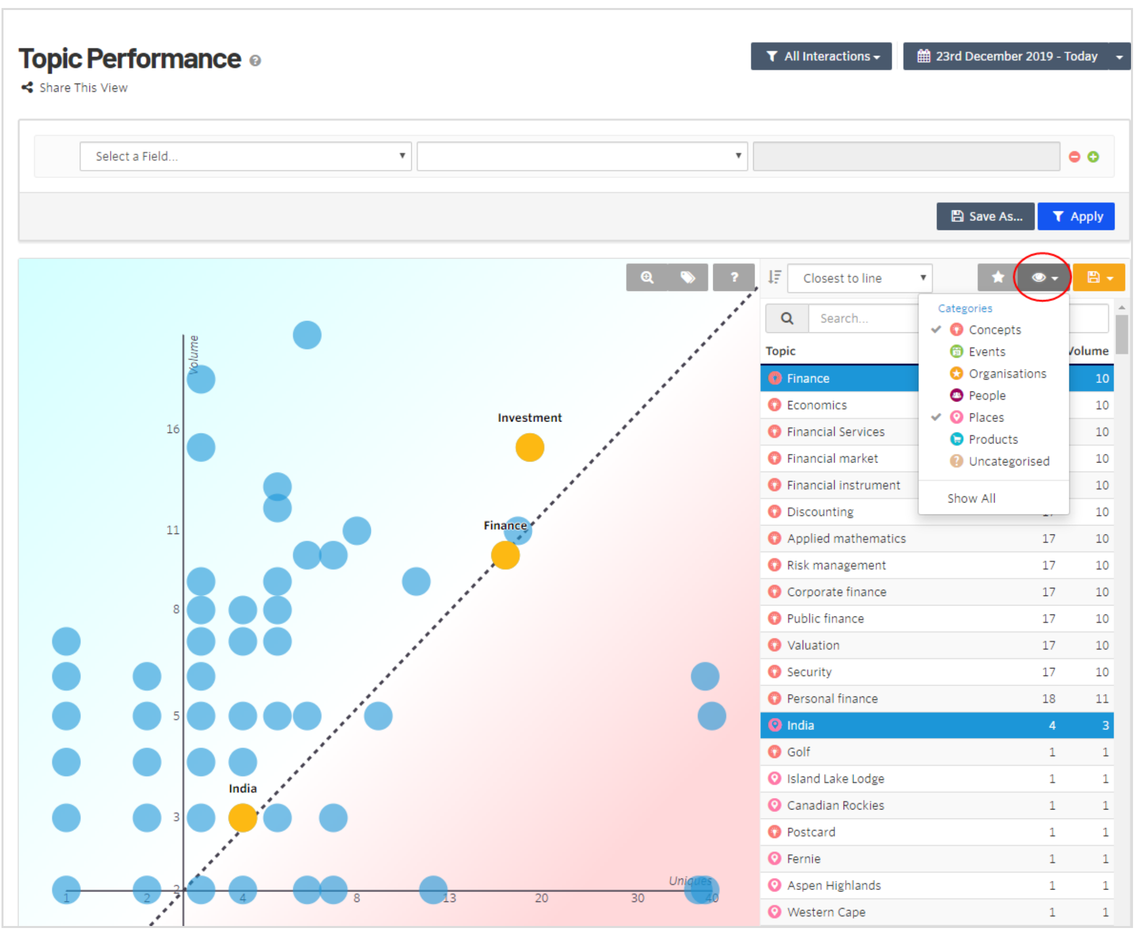
1. Click a bubble on the graph, or select a topic from the list, and click **Save Selection**.



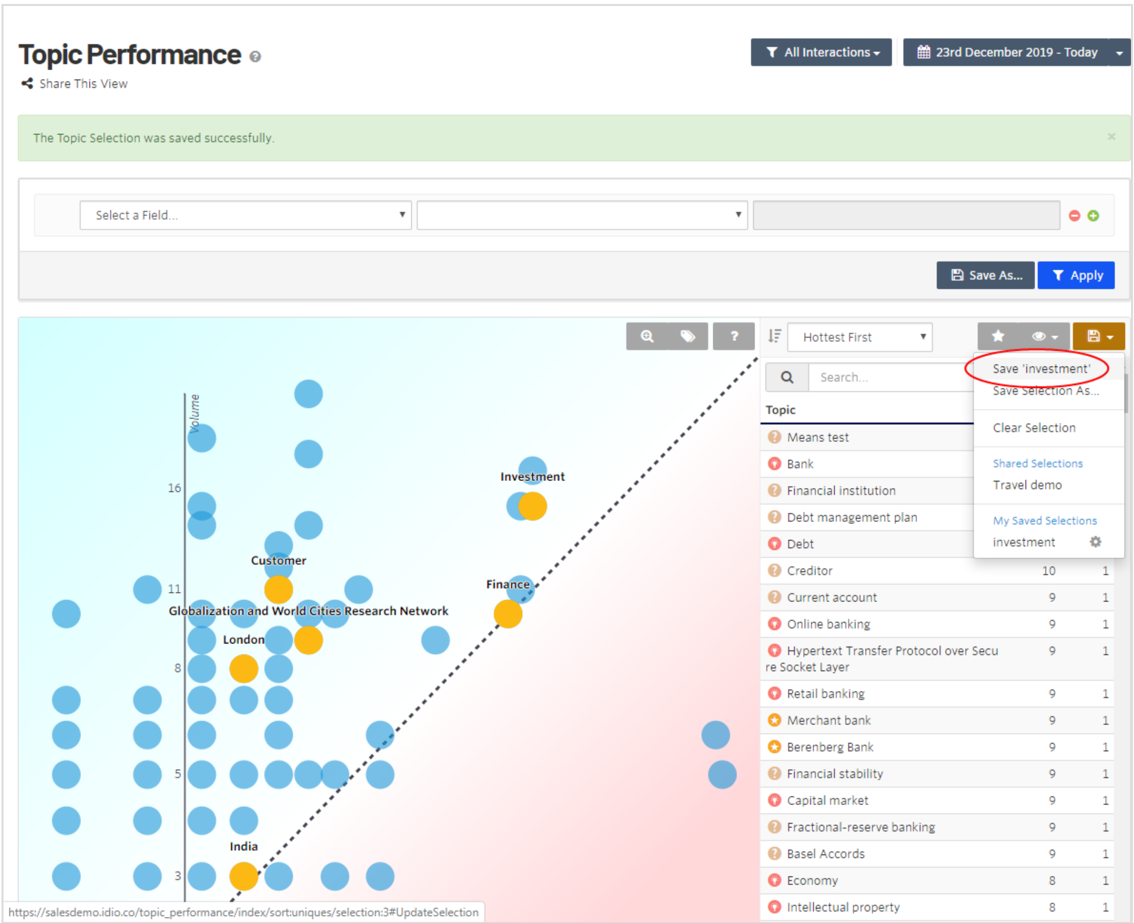
2. Enter a title for the selection. Enable the check box to make the selection available to other members of your organization; disable to make the selection for you only.



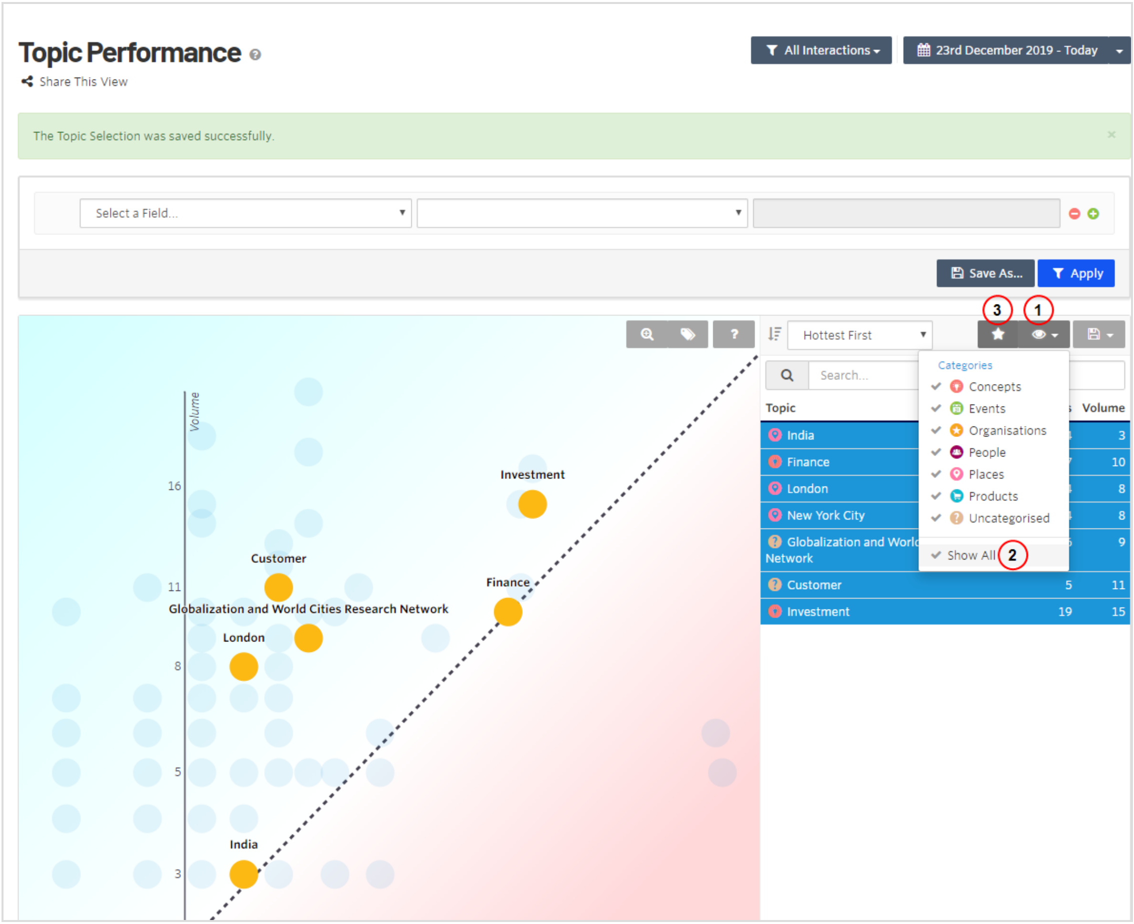
3. You can divide the topic list by category, and add relevant topics from each category to the list. Click **View** to display the **Categories** and view each category one at a time, reducing the number of topics displayed on the graph.



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}***.



6. 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.

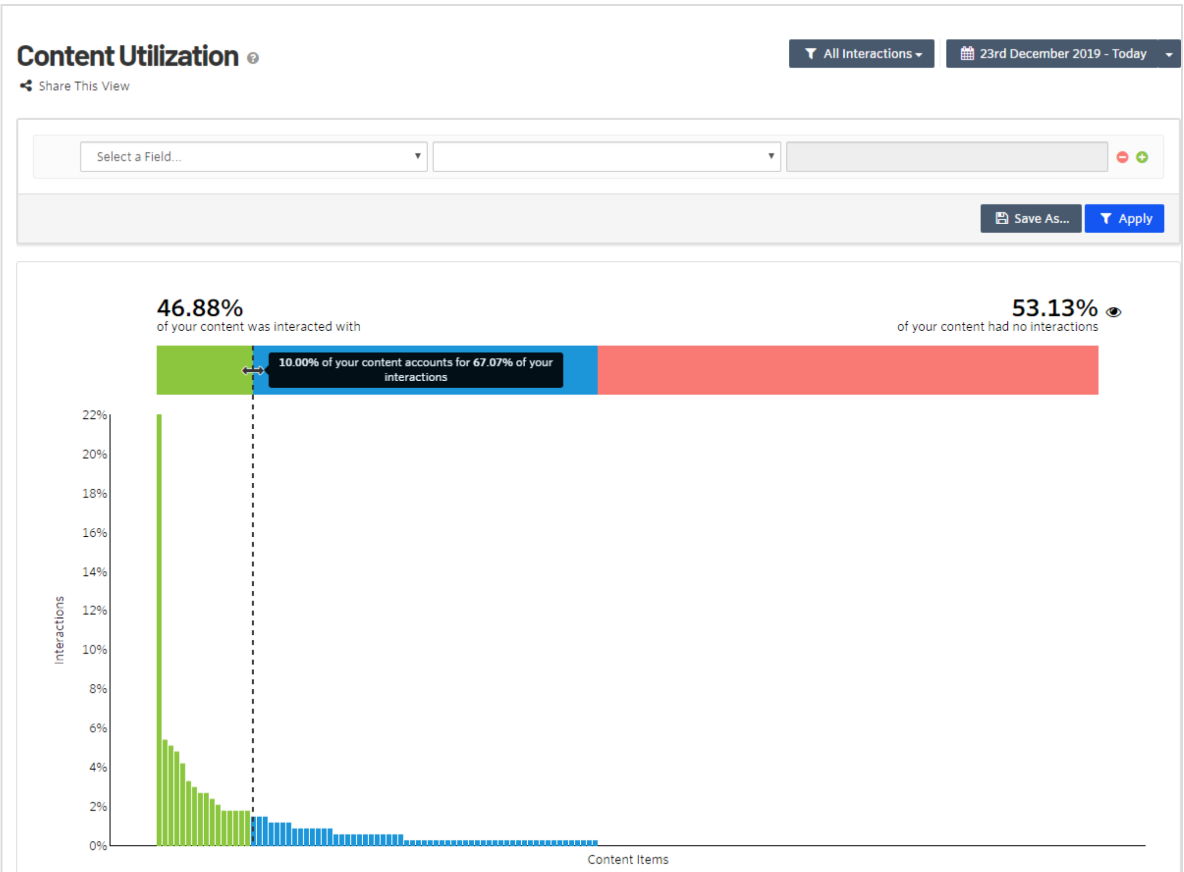
> Note: You can drag the dotted line separator to see what percentage of topics make up various percentages of your interactions.

- **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.



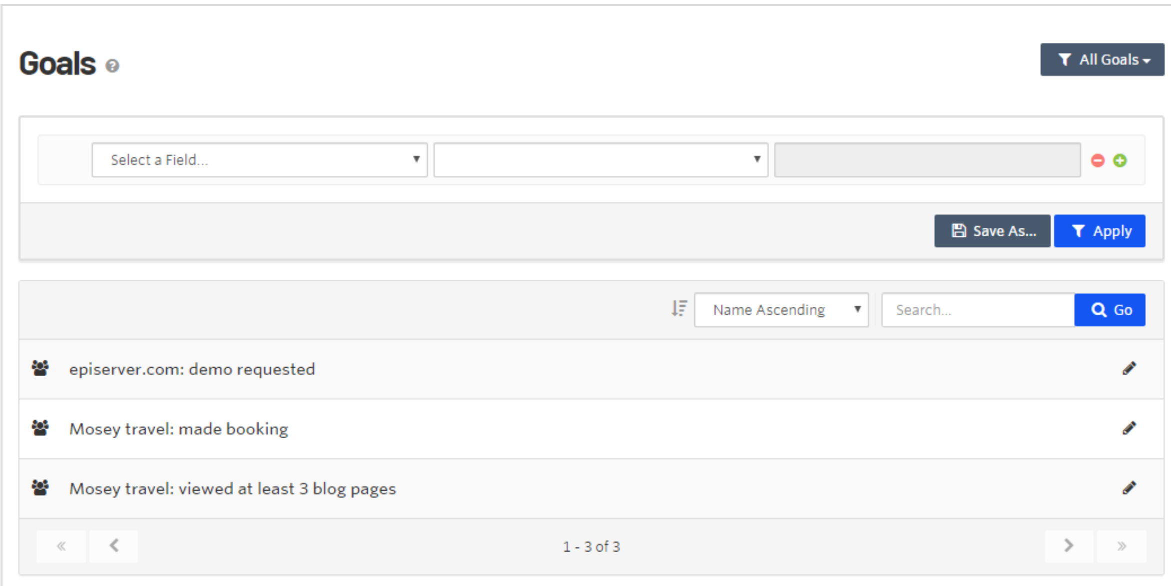
Goals

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

A goal is 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*.

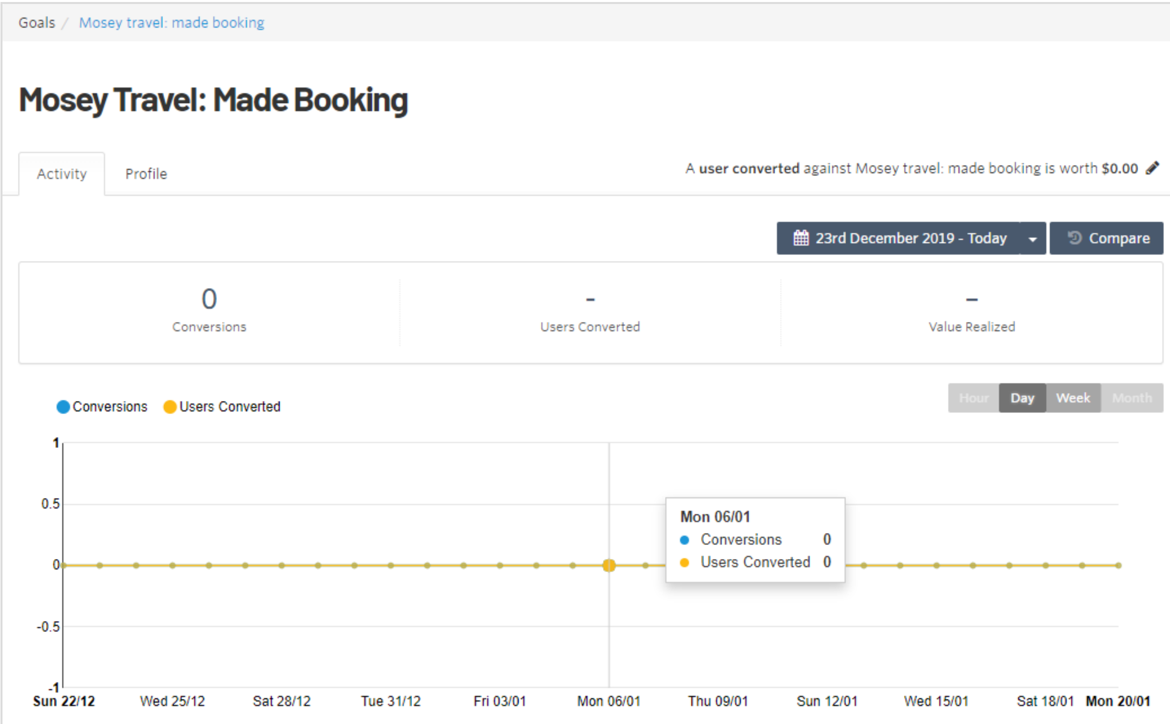
> Tip: Developers create goals using JavaScript. See Creating goals and tracking conversions on Episerver World for more information.

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.

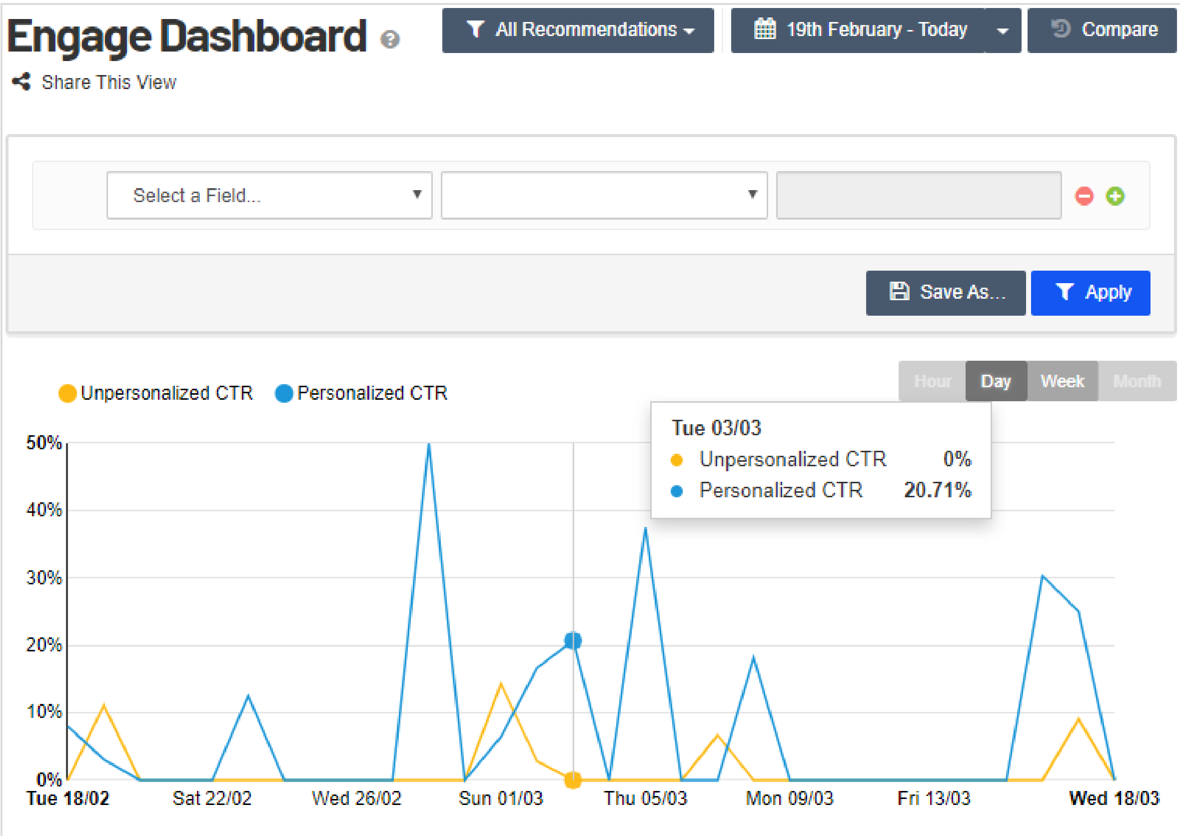
Note: The goal name must be less than 255 characters in length. If the goal does not already exist, it will be created.

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.

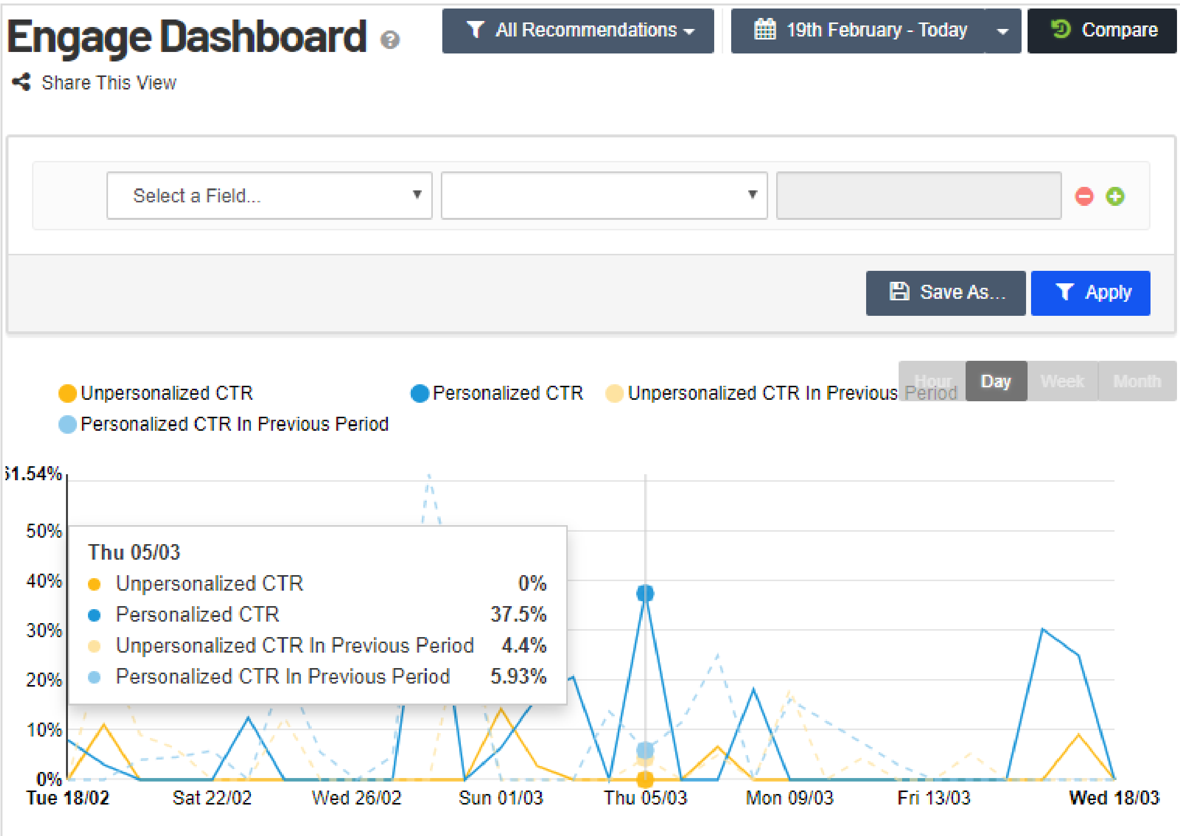


- An A/B test for each widget compares the click-through rate (CTR) of personalized recommendations versus unpersonalized recommendations.
- You can link a delivery to conversion of a goal.
- You can filter and save Recommendations views for frequent use, and share a view with a linked URL. Saved filters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

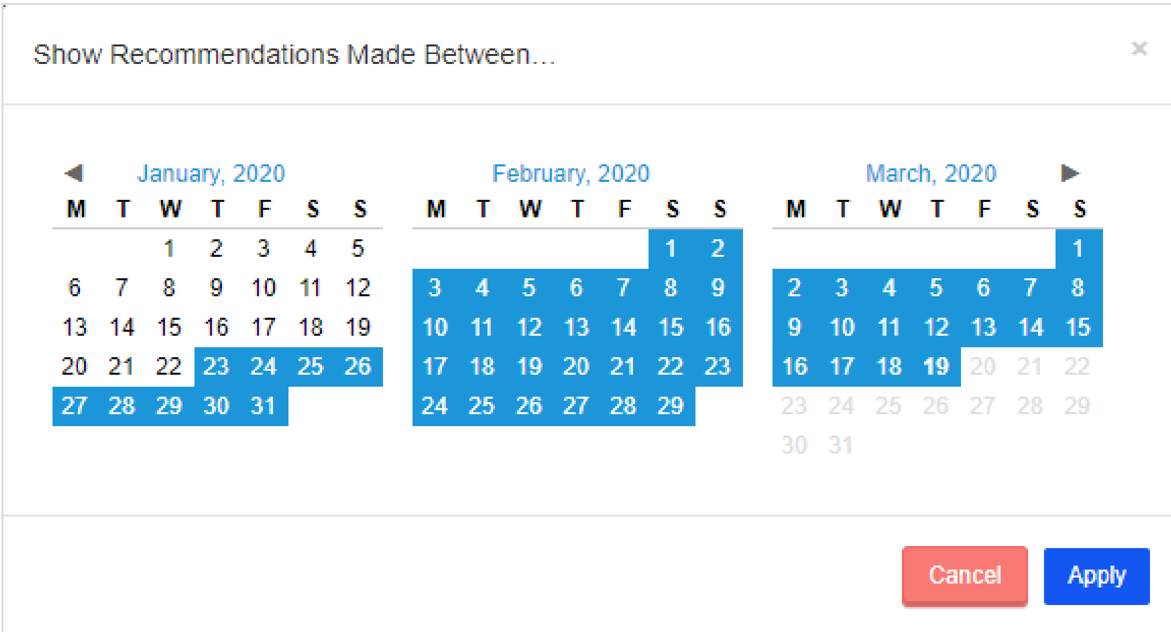
Comparing periods

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.

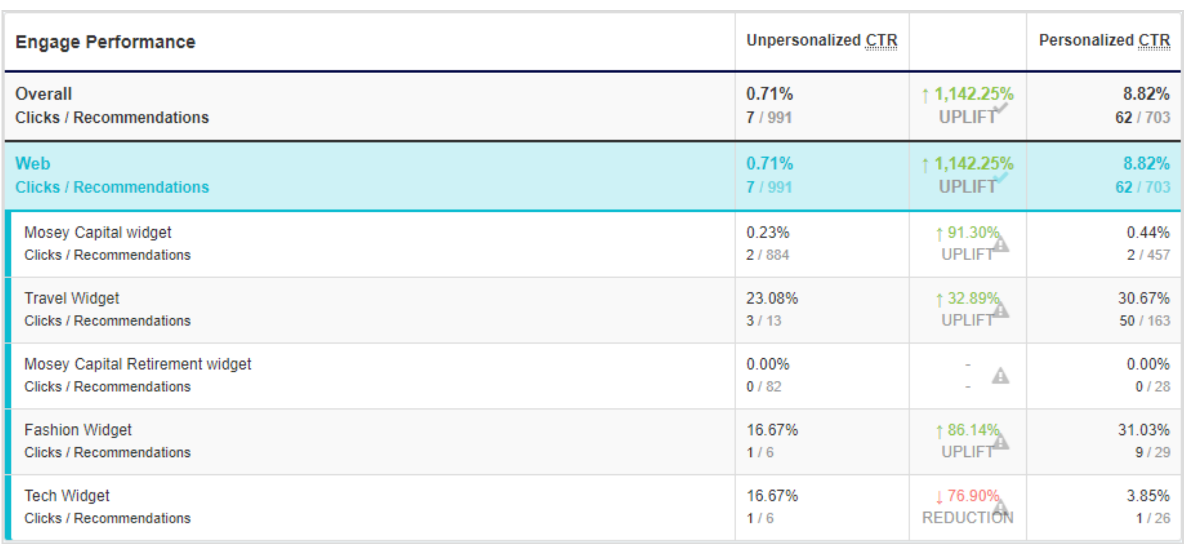


To select a custom date range:

1. Open the date drop-down.
2. Select **Custom Period**.
3. Click the begin and end dates.

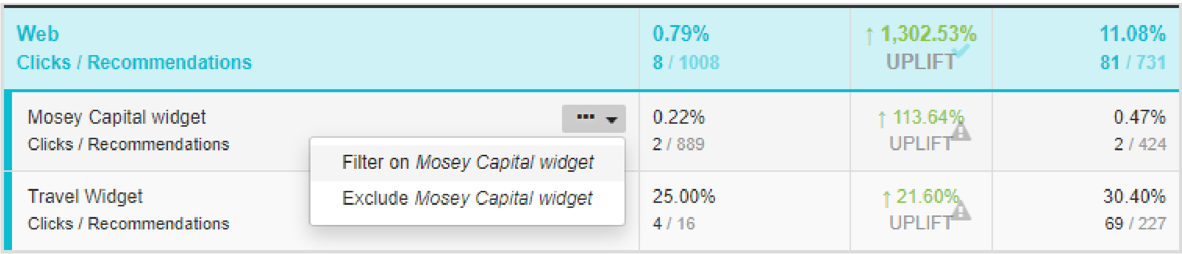


The **Engage Performance** view shows the click-through rate (CTR) for each content item and compares the unpersonalized CTR to the personalized CTR.



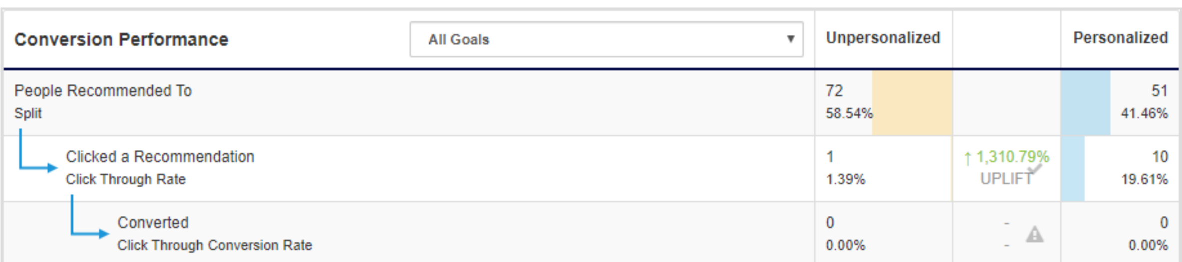
Engage Performance	Unpersonalized CTR		Personalized CTR
Overall Clicks / Recommendations	0.71% 7 / 991	↑ 1,142.25% UPLIFT	8.82% 62 / 703
Web Clicks / Recommendations	0.71% 7 / 991	↑ 1,142.25% UPLIFT	8.82% 62 / 703
Mosey Capital widget Clicks / Recommendations	0.23% 2 / 884	↑ 91.30% UPLIFT	0.44% 2 / 457
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.



The **Conversion Performance** view:

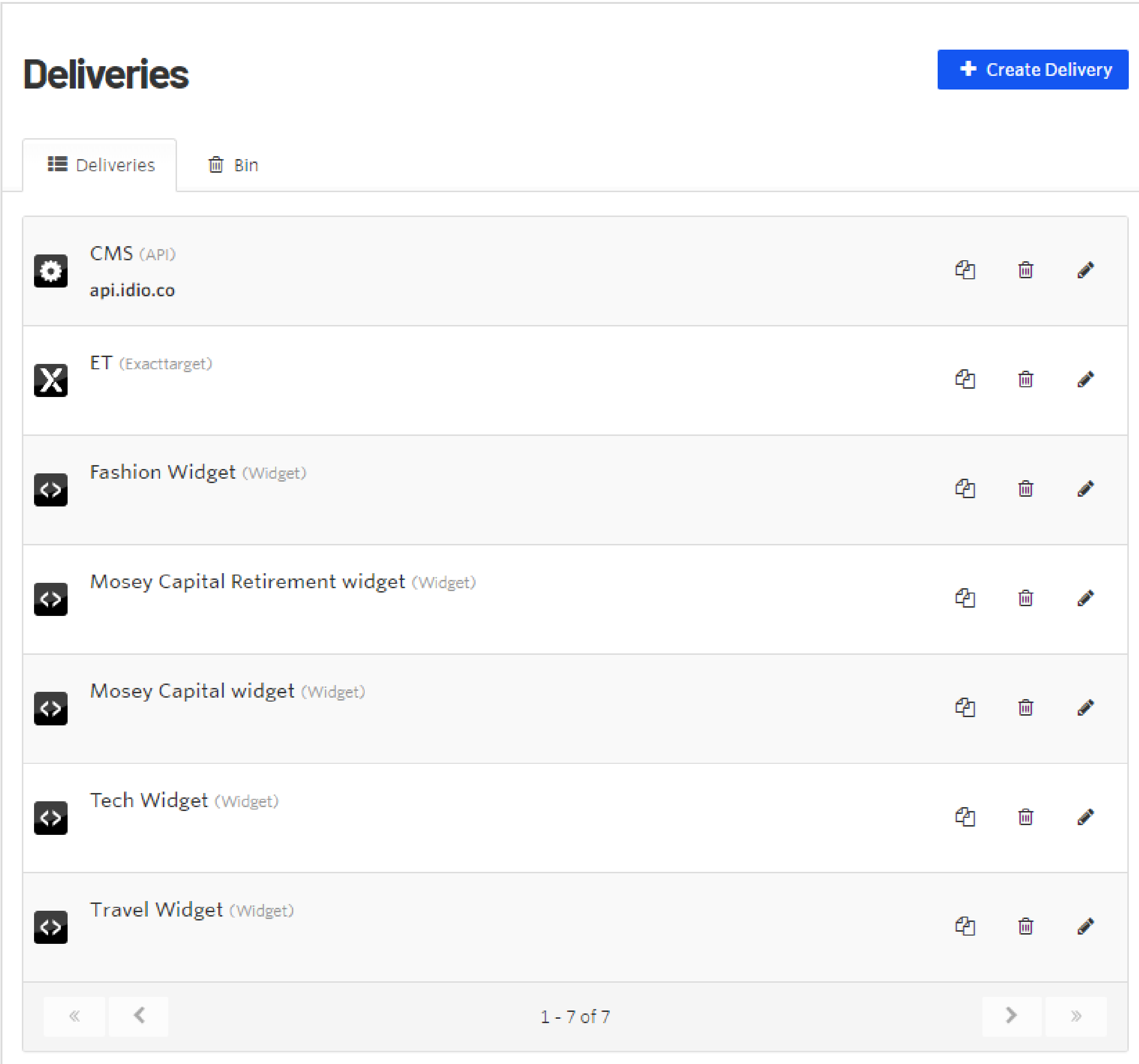
- Shows the conversion rate for each goal.
- Compares unpersonalized conversions to personalized ones.



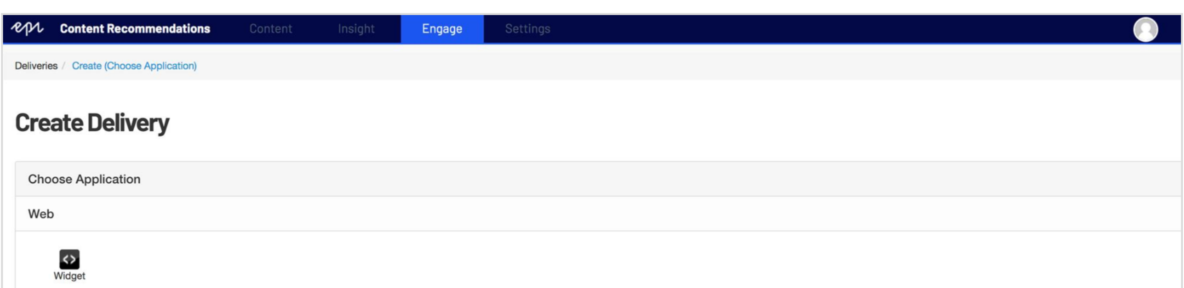
Setting up deliveries

> Note: The menu item **Deliveries** requires extended user rights. Contact your [[[Undefined variable Variables.Advance]]] administrator.

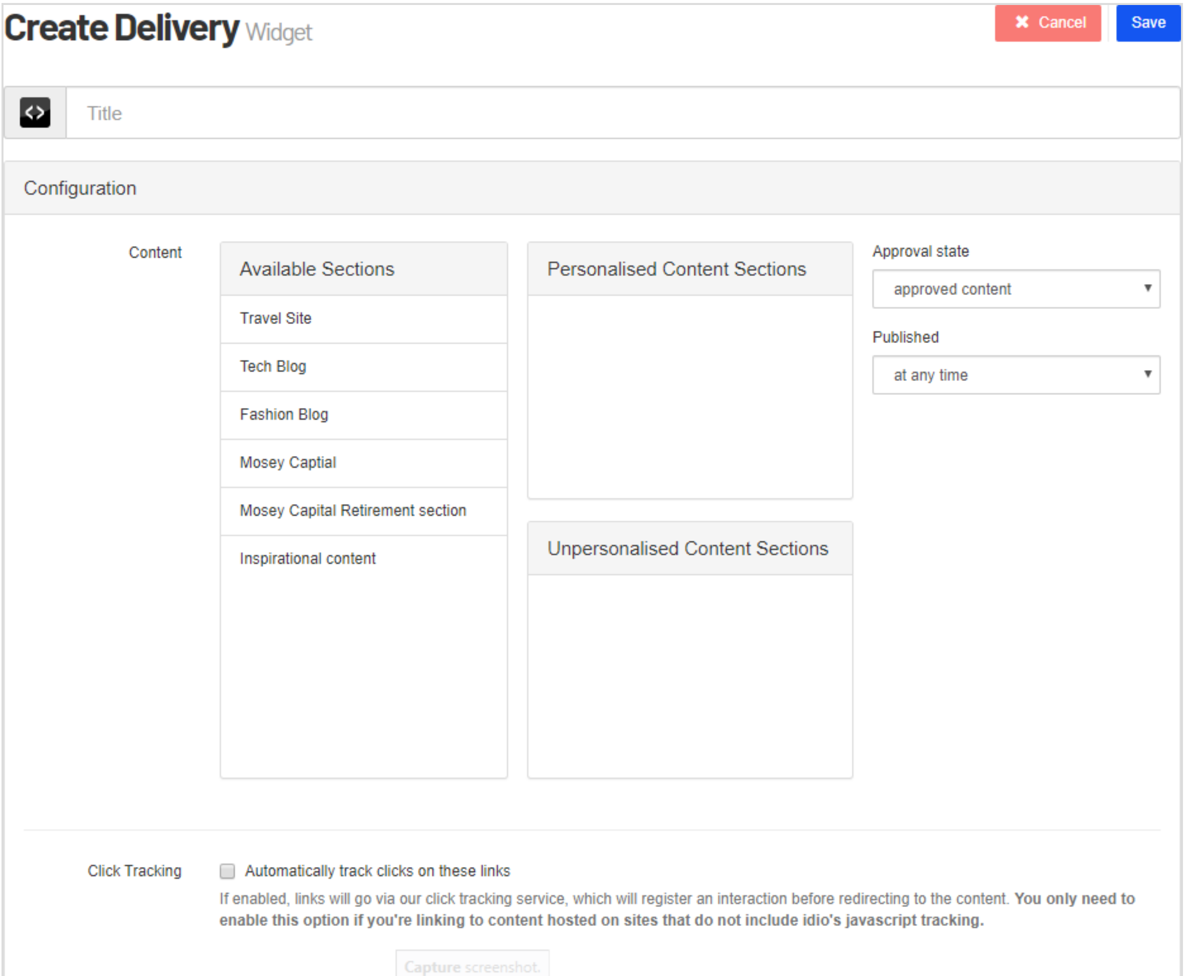
You can set up deliveries to drive personalized marketing to key customers.



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, [[[Undefined variable Variables.Advance]]] serves the most recent content from the **Personalized Content Section**.
  - If the **Unpersonalized Content Section** is populated, [[[Undefined variable Variables.Advance]]] 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 Episerver's tracking service. If you link to content that is hosted on sites that do not include Episerver'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.

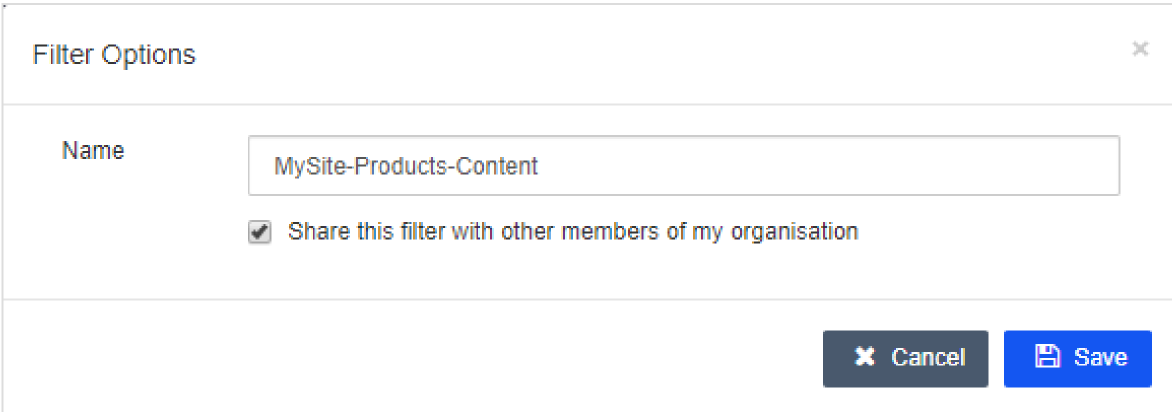
Filtering Content Recommendations

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.

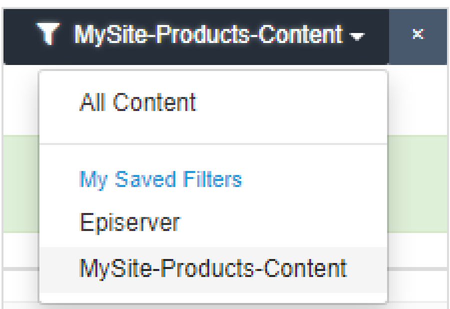
You should organize compound filters from widest-to-narrowest focus. For example, set a compound filter using source, main category or folder, and folder exclusions like so:

- **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.)

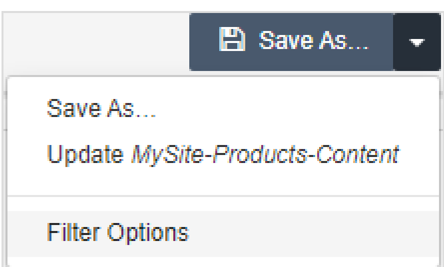
After you create one or more filter definitions, save each one so you can view them repeatedly. However, you cannot use a saved filter in another section. (That is, you cannot use a saved Insight filter for Engage data. So create and save filters in each view.)



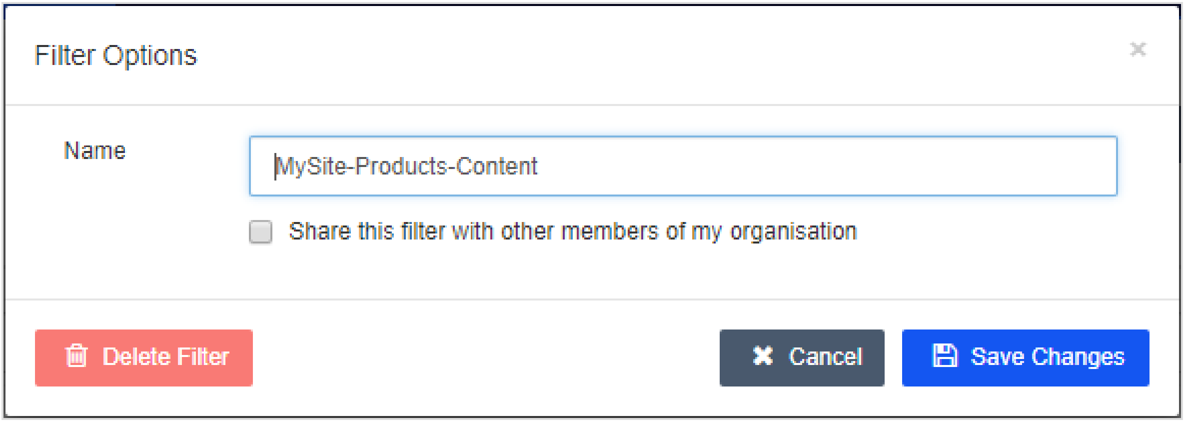
To use a saved filter, open the filter menu in any view and select the filter that you want.



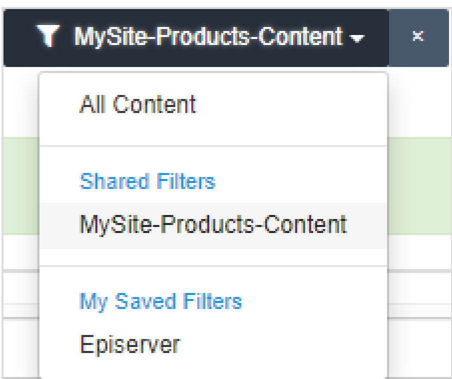
If you modify a filter's criteria, instead of saving a new filter, you can update the saved filter from the **Save As** menu.



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

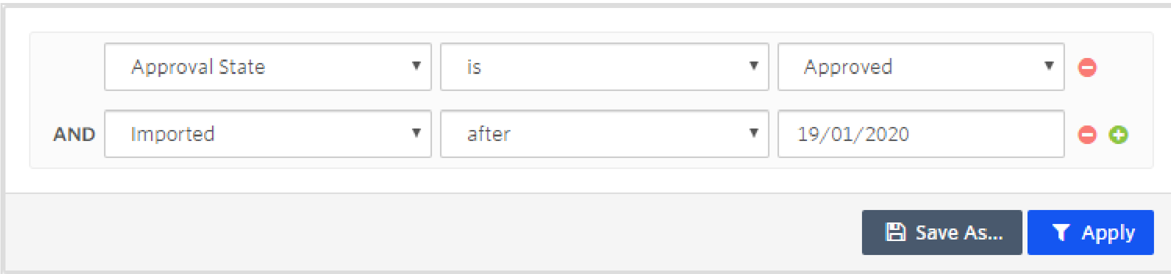


If you share the filter with other members, the filter is moved from **My Saved Filters** to **Shared Filters** in the filter menu.



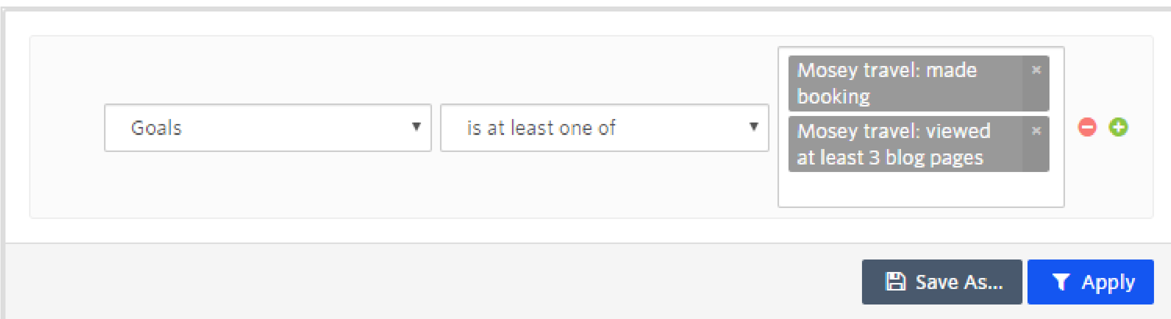
If a content item is marked as **Unapproved**, Engage does not include it in recommendations. To avoid Unapproved content, add the **Approval State** filter to show only approved content. Add a filter for an import date.

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



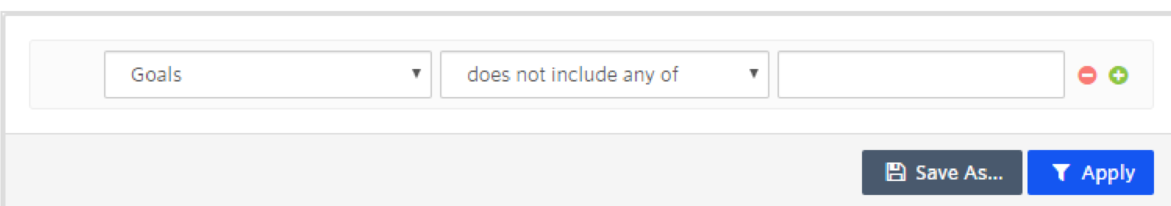
Filtering on multiple goals to content

The following example shows multiple goals.



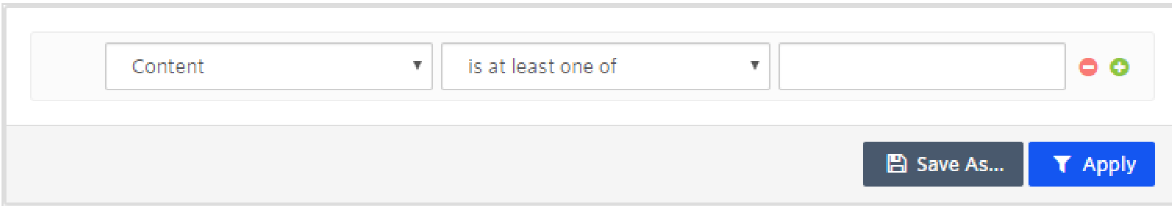
Filtering content that has little or no impact on goals

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



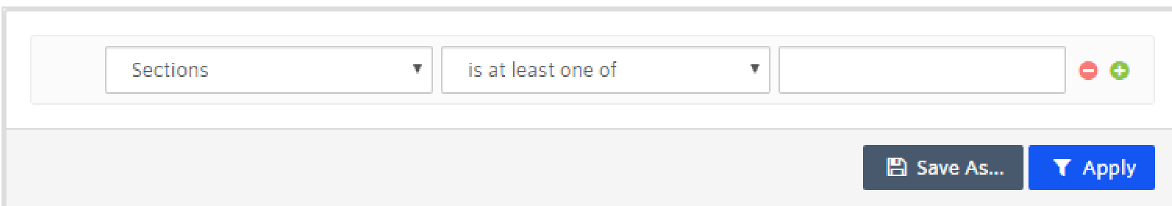
Filtering specific content

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



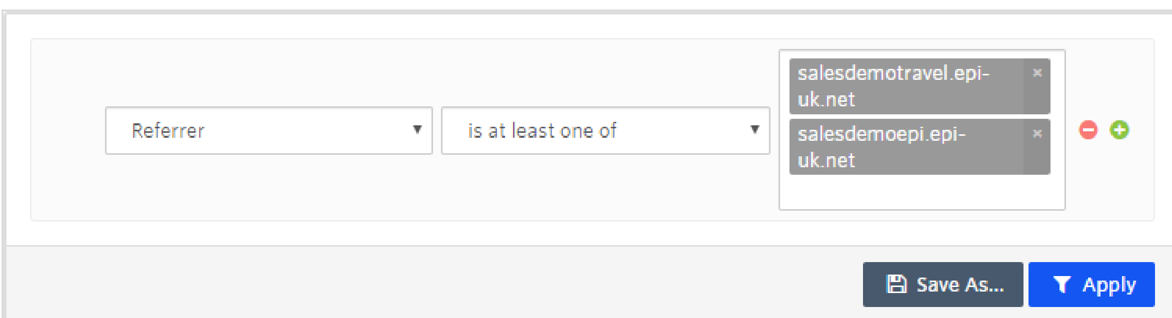
Filtering content in a section

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



Filtering pay-per-click (PPC) channel

PPC channel filters are created for you. Contact Episerver support. Channel filters provide visibility into what drives content consumption.



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

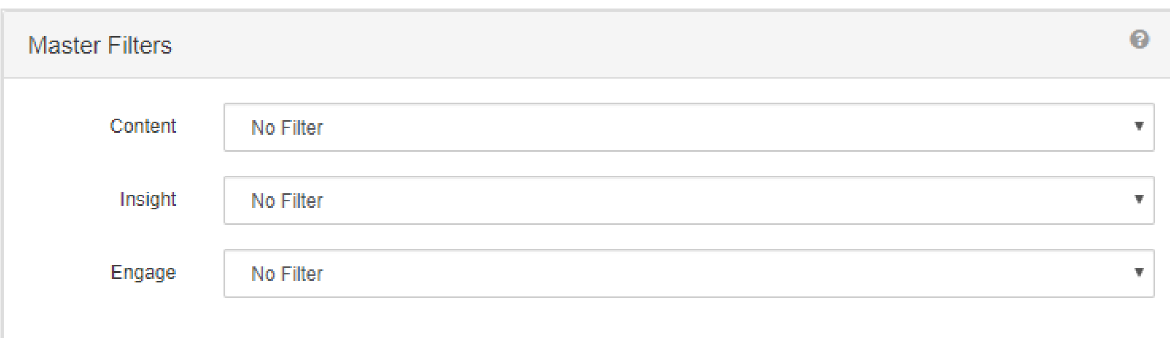
Select **Settings > Configuration** to:

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

Master filters

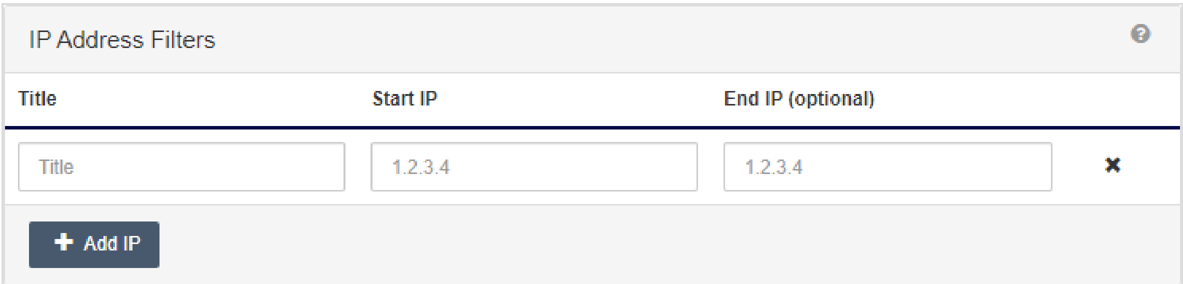
If you saved a filter for the Content, Insight, or Engage dashboards, you can select it from the drop-down as the default dashboard view. For example, if you save an Engage dashboard to view only web widgets, and set that filter as your Master Filter for Engage, only web widgets appear when viewing the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



IP address filters

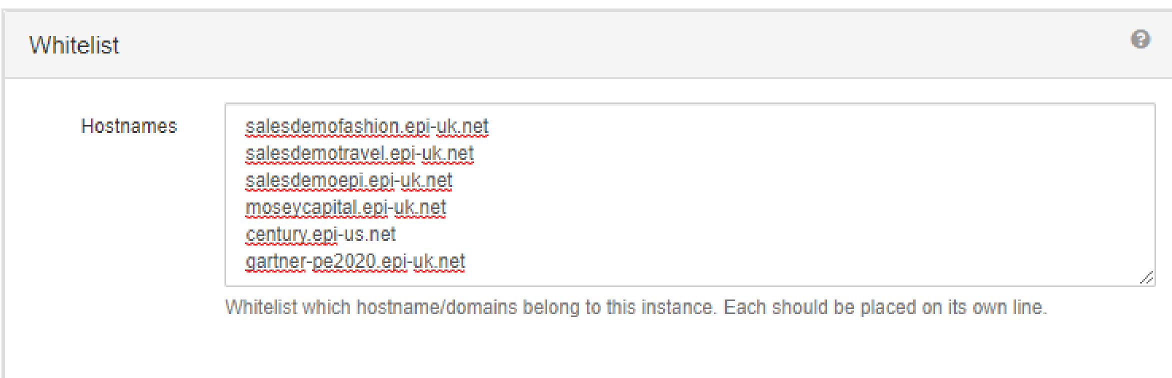
If you set an IP range, any interactions from that IP range are removed from reporting. This is also retroactive. So if you made many clicks yesterday and then add your IP address, your clicks from yesterday will not show up in reporting. The End IP address is optional.



Whitelist

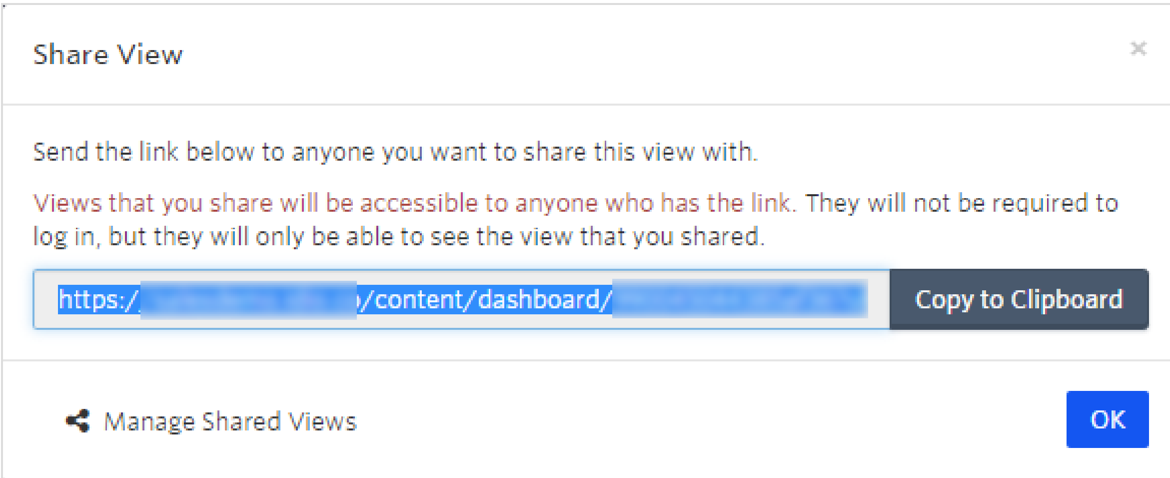
Enter the hostnames and domains that belong to the Content Recommendations installation. Place each item on its own line.

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



Shared views

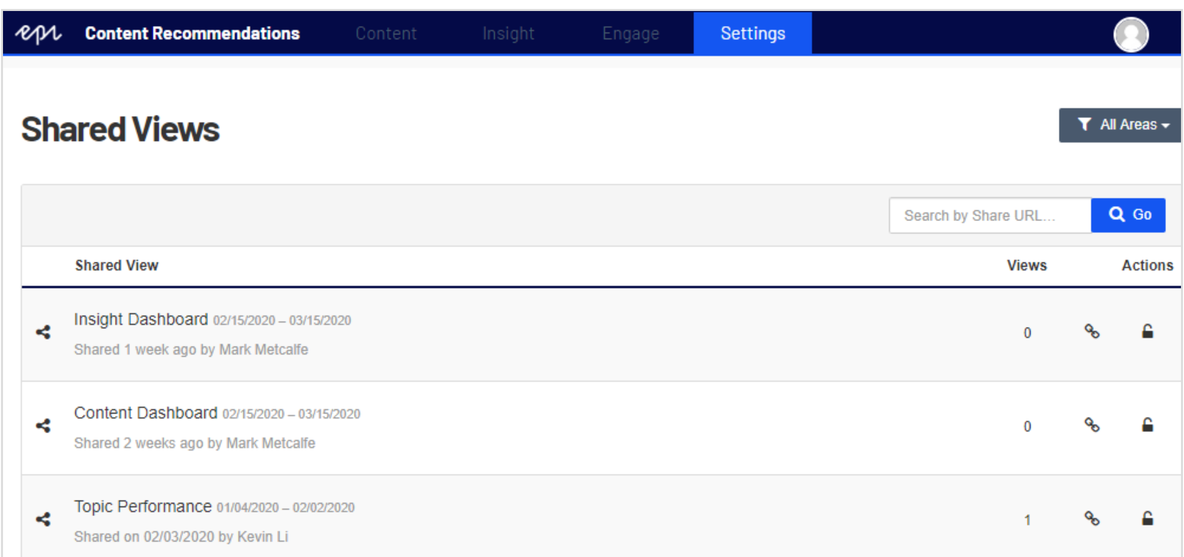
Each dashboard has a **Share this View** link near the title. Click **Share this View** to send a link to someone whom you want to see the data.



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

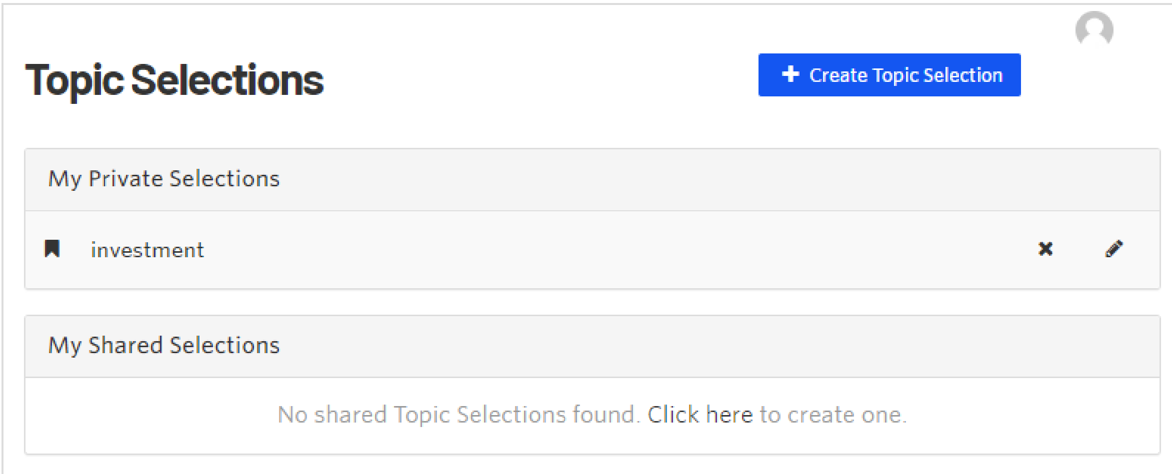
To see all shared views, go to **Settings > Shared Views**. Click any view to see the data.

- 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).

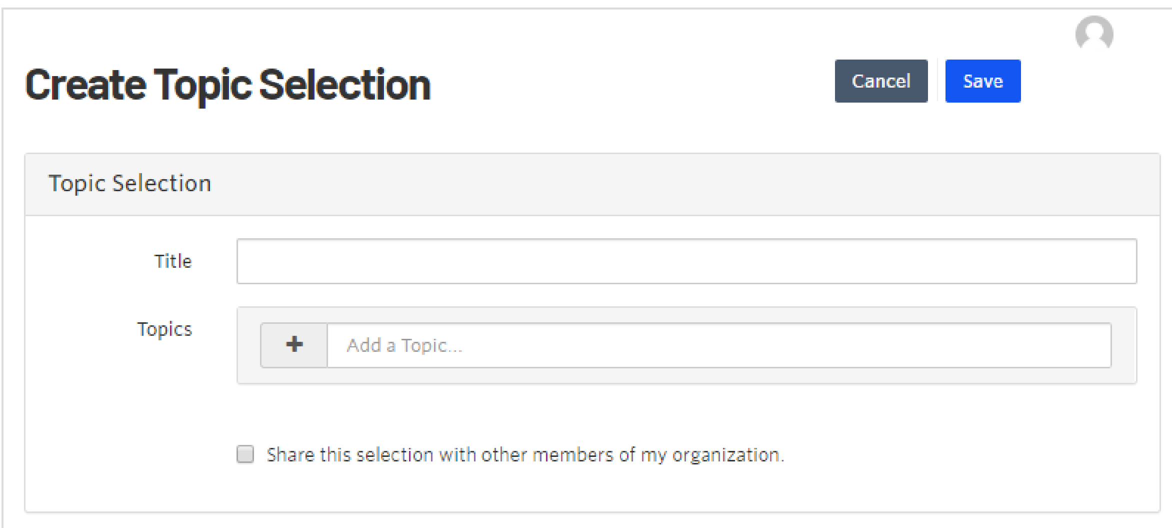


Topic selections

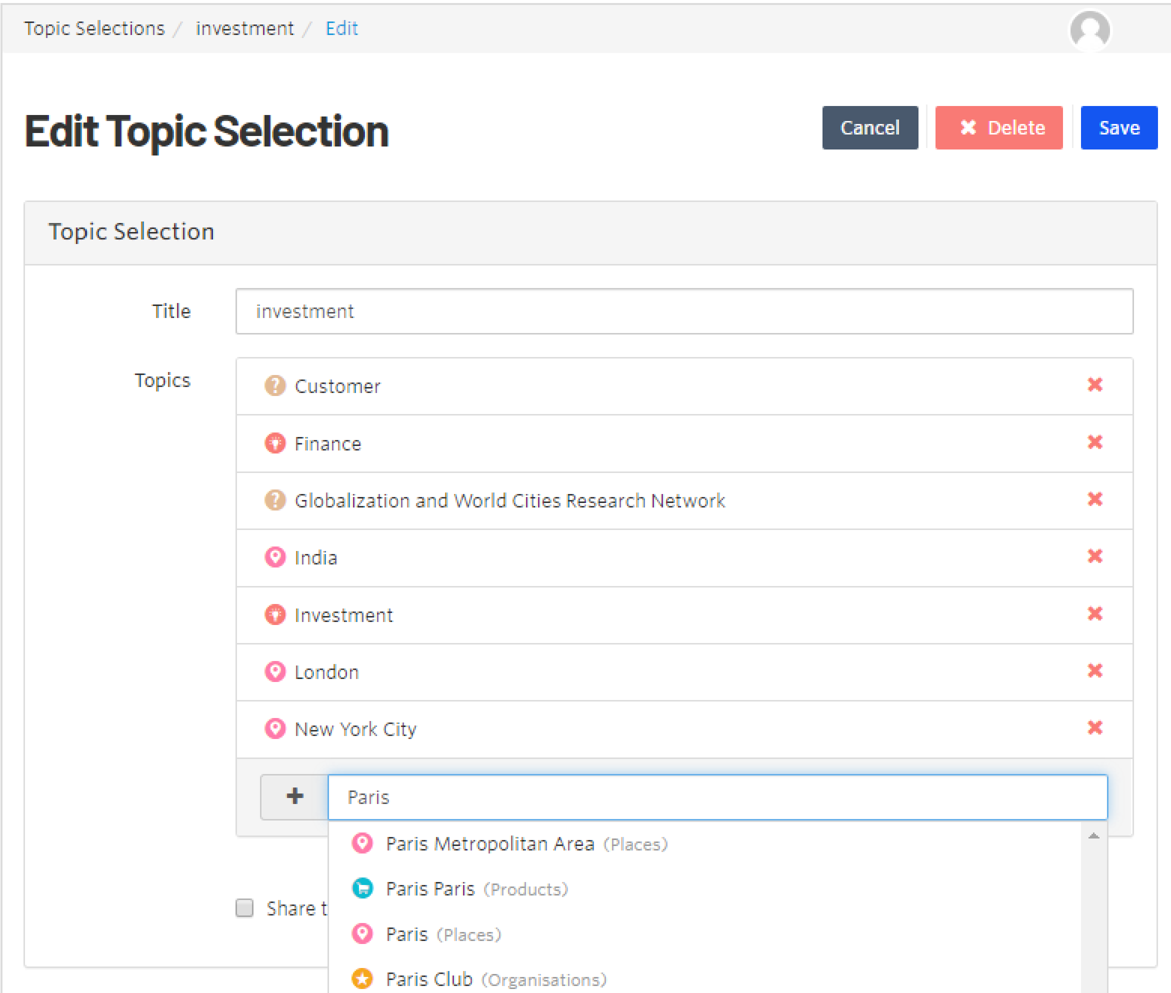
Displays private or shared selections.



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



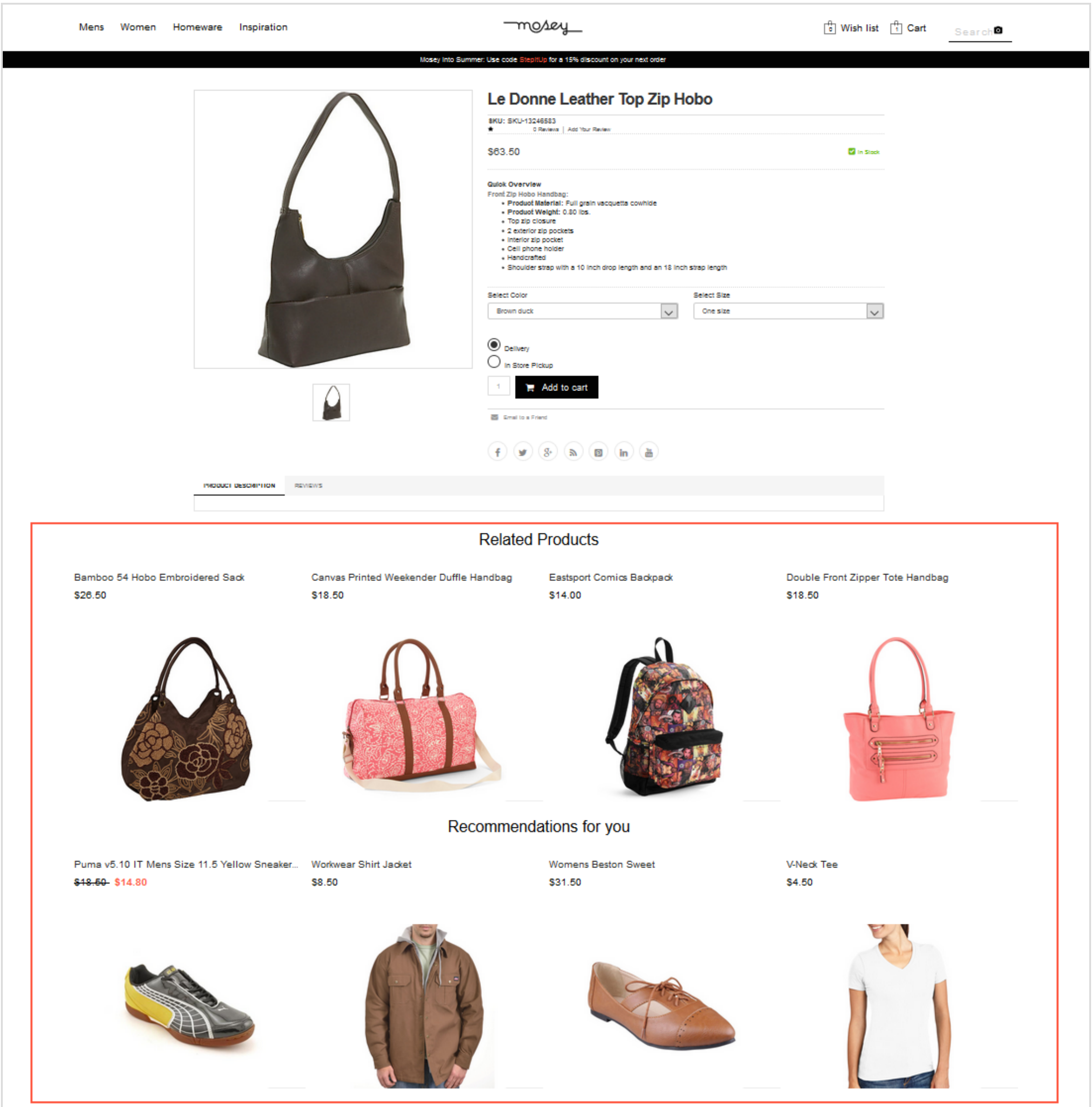
Click a topic to view it. You can add topics (as shown in the following image) and click **Save**.



Product Recommendations

Note: The Episerver Customer-Centric 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 Episerver World for technical information.

With Episerver Product Recommendations, you can provide a personalized shopping experience for visitors to your e-commerce website.



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 Episerver Personalization developer guides.

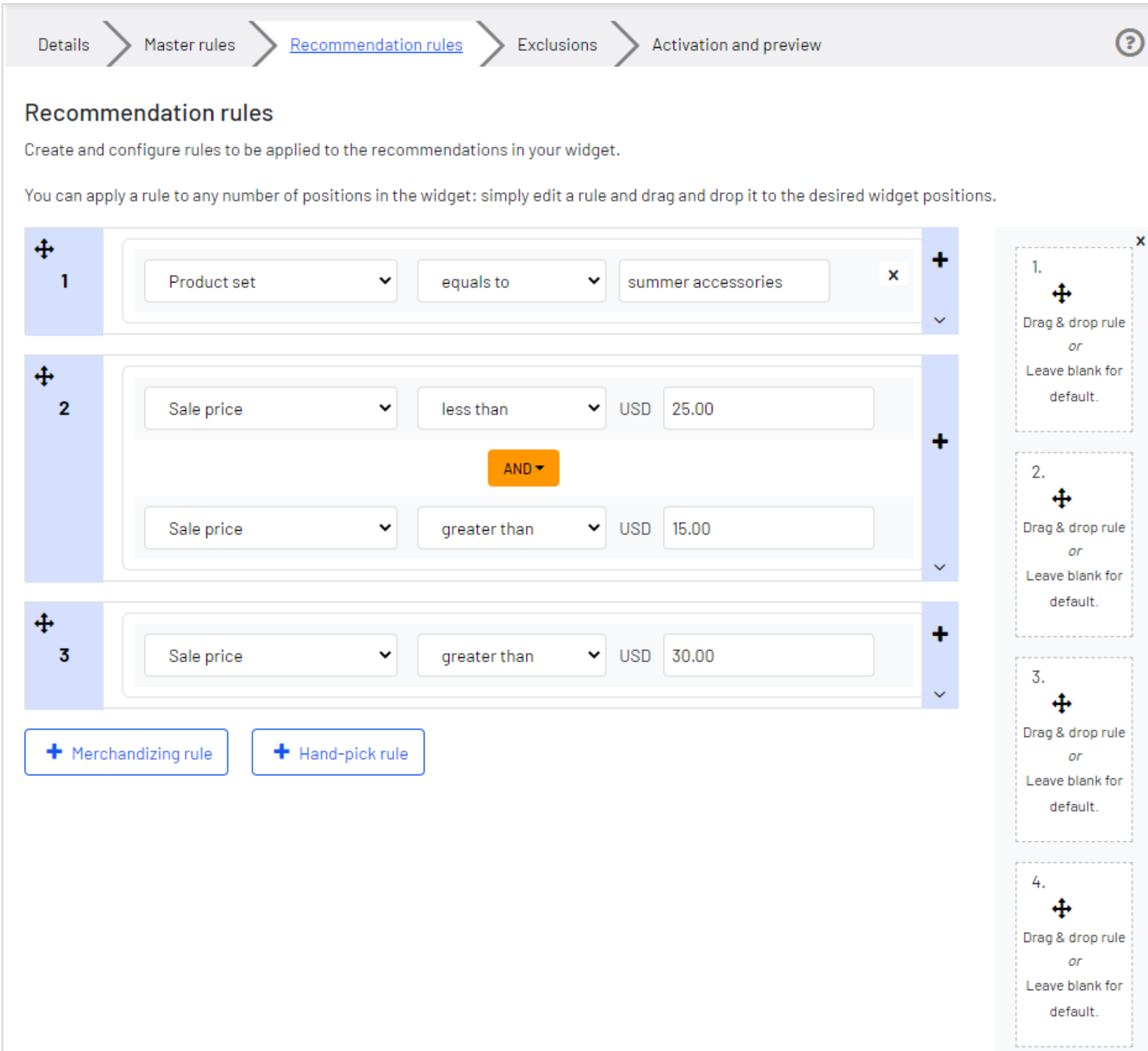
How it works

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

A strategy comprises a number of algorithms, developed by Episerver'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 tries to return a product recommendation matching 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.

From the Product Recommendations interface, you can refine the product recommendations generated by Episerver algorithms, or override product recommendations to execute specific merchandising campaigns using your overall site strategies and targets.

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



Product Recommendations interface

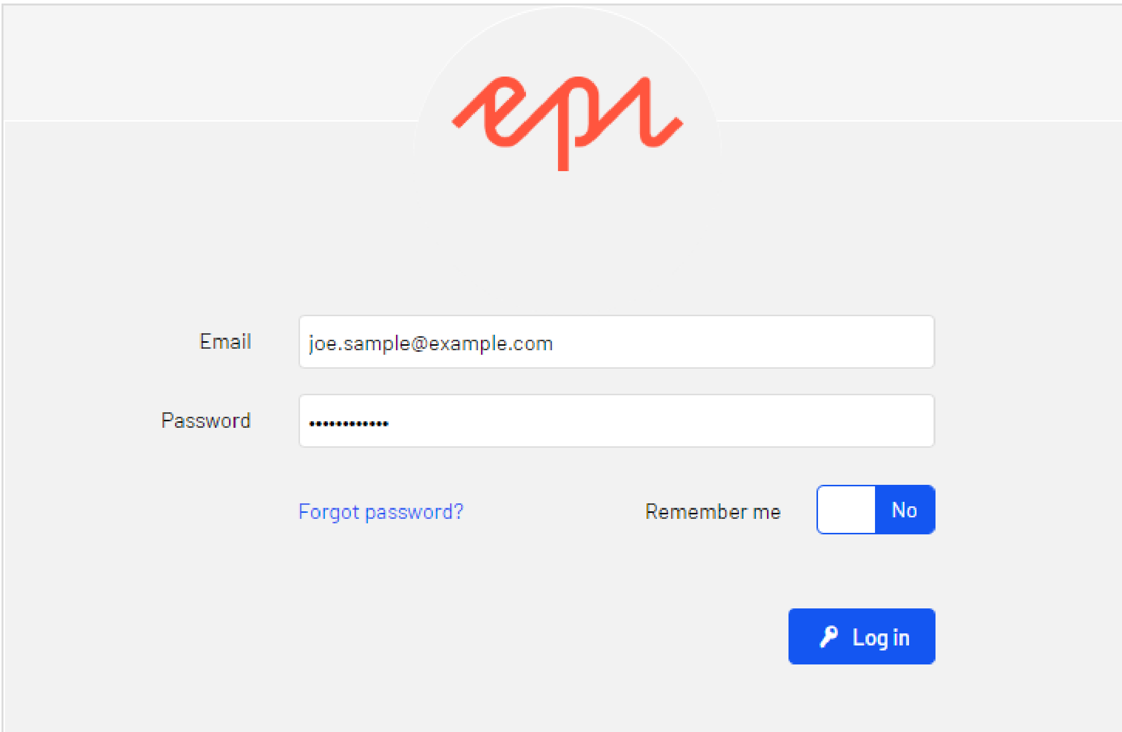
The Product Recommendations interface is available in the Episerver for the Personalization Portal.

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

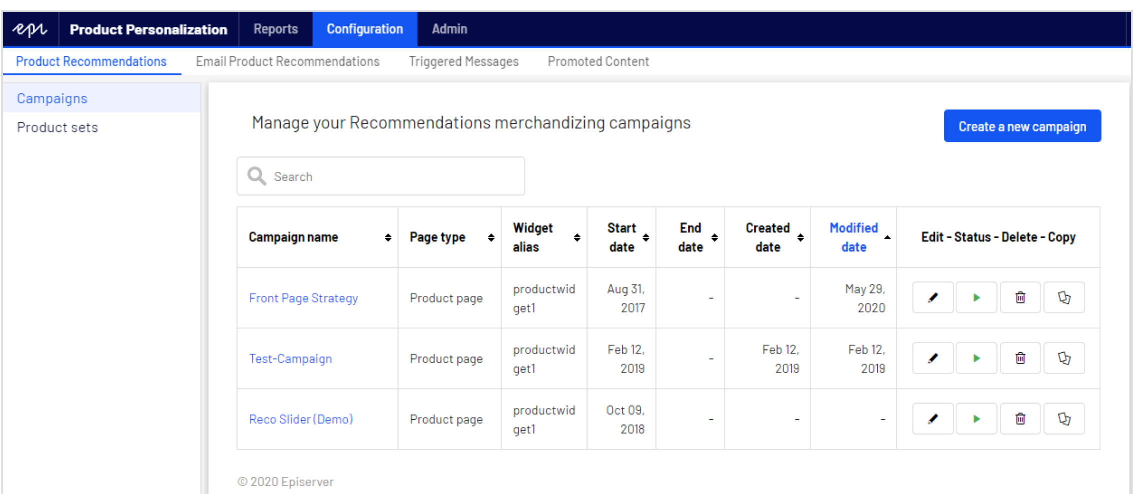
```
https://smartmanager.peerius.com/admin
```

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

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



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



4. Click **Create a new campaign** to start setting up a new campaign. See Setting up an Email Product Recommendations campaign (in the Episerver Email Product Recommendations User Guide) or Setting up a Product Recommendations campaign.
5. To edit an existing campaign, click the campaign name or **Edit** next to it.

Setting up a Product Recommendations campaign

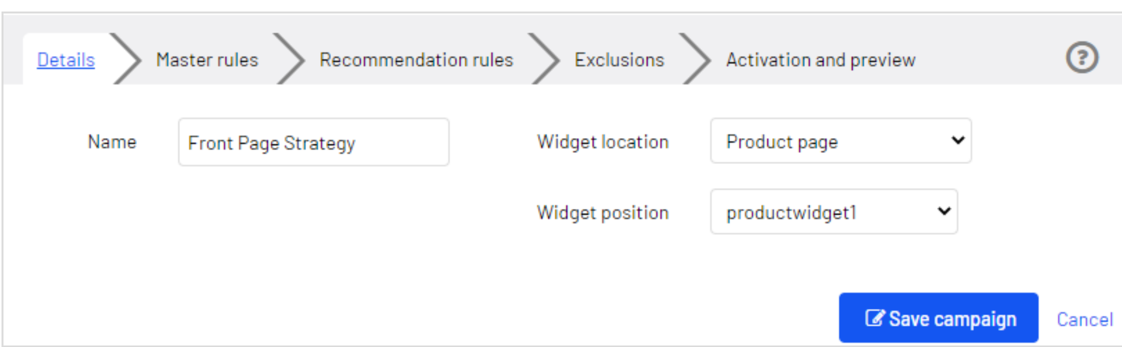
To create a new Product Recommendations campaign, click **Create a new campaign** from the **Recommendations** overview screen, or select the **Recommendations** > **New campaign** tab. The campaign editing screen appears. The set-up process involves the following steps:

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

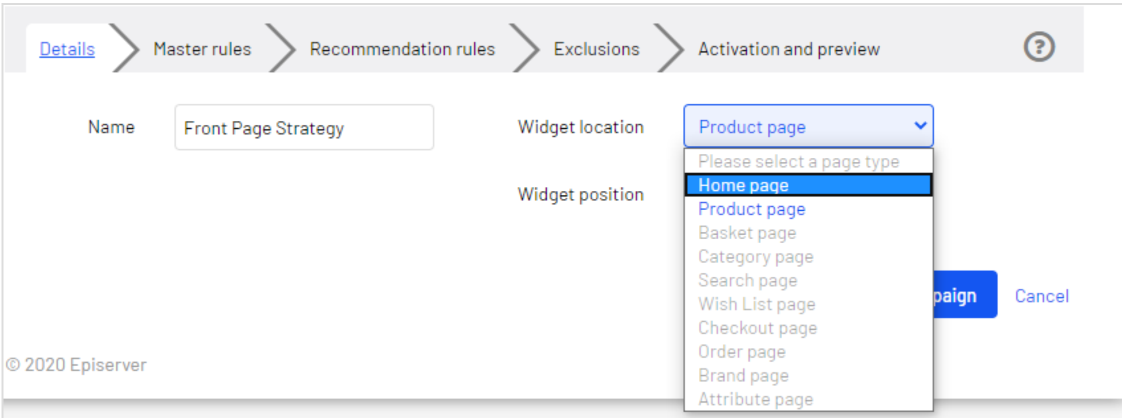
Configuring main Product Recommendations campaign details

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.

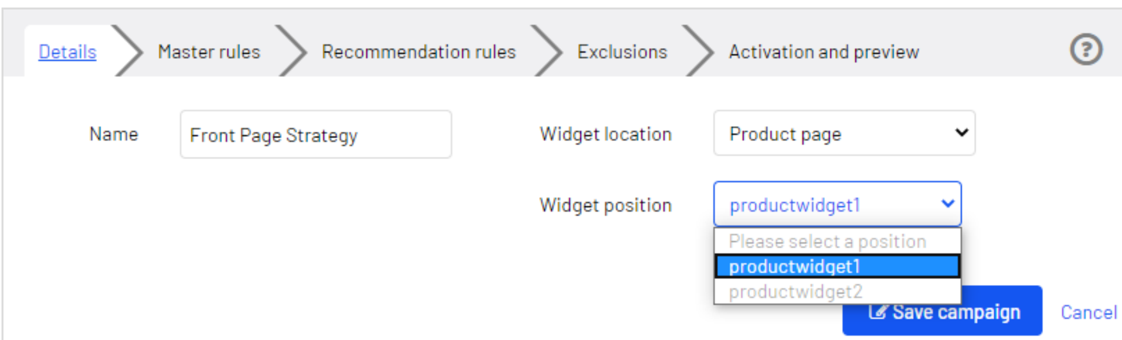
1. Enter a name for the campaign you are creating, such as *Front Page Strategy* or *Brand Rule*.



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.

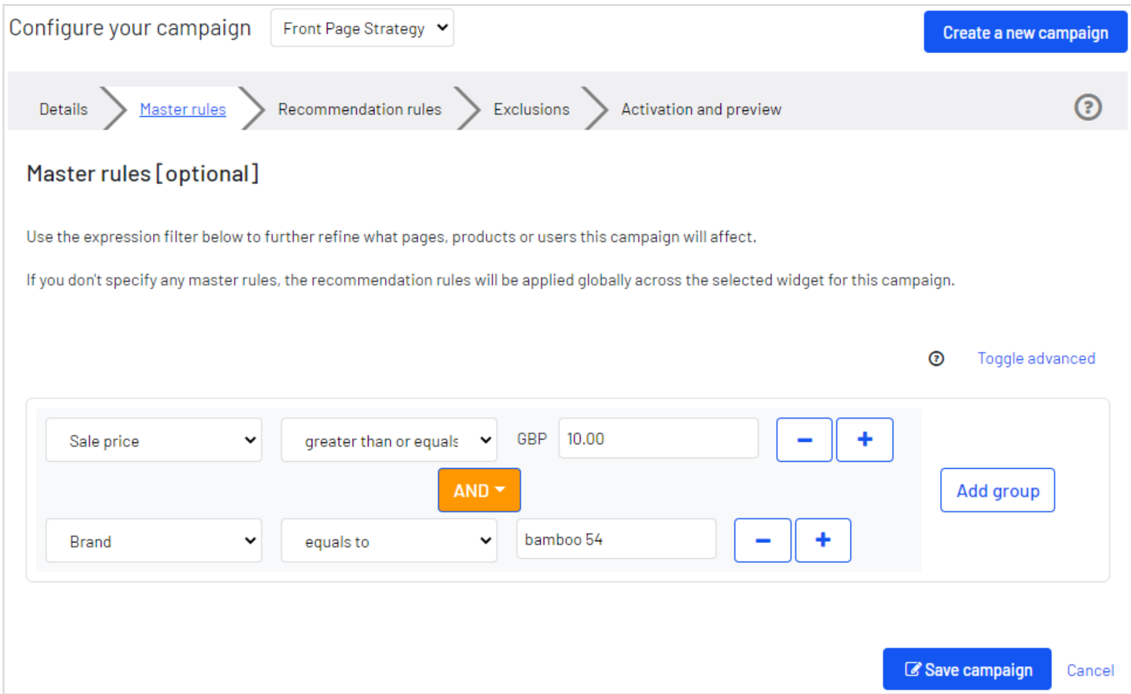
Master rules let you refine the Product Recommendations campaign effects to pages, products, or visitors. If you do not specify any master rules, the merchandising rules are applied globally across the selected widget for a campaign. If you apply a Master rule, it must be satisfied to apply product recommendation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

Examples of **Master rules** frequently used:

Use case	Master rule	Recommendation rule
Recommend only products from the same brand as the current product being viewed.	Brand **equals to** and type the brand name in the Search field.	Brand **equals to** and type the brand name in the Search field.

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

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

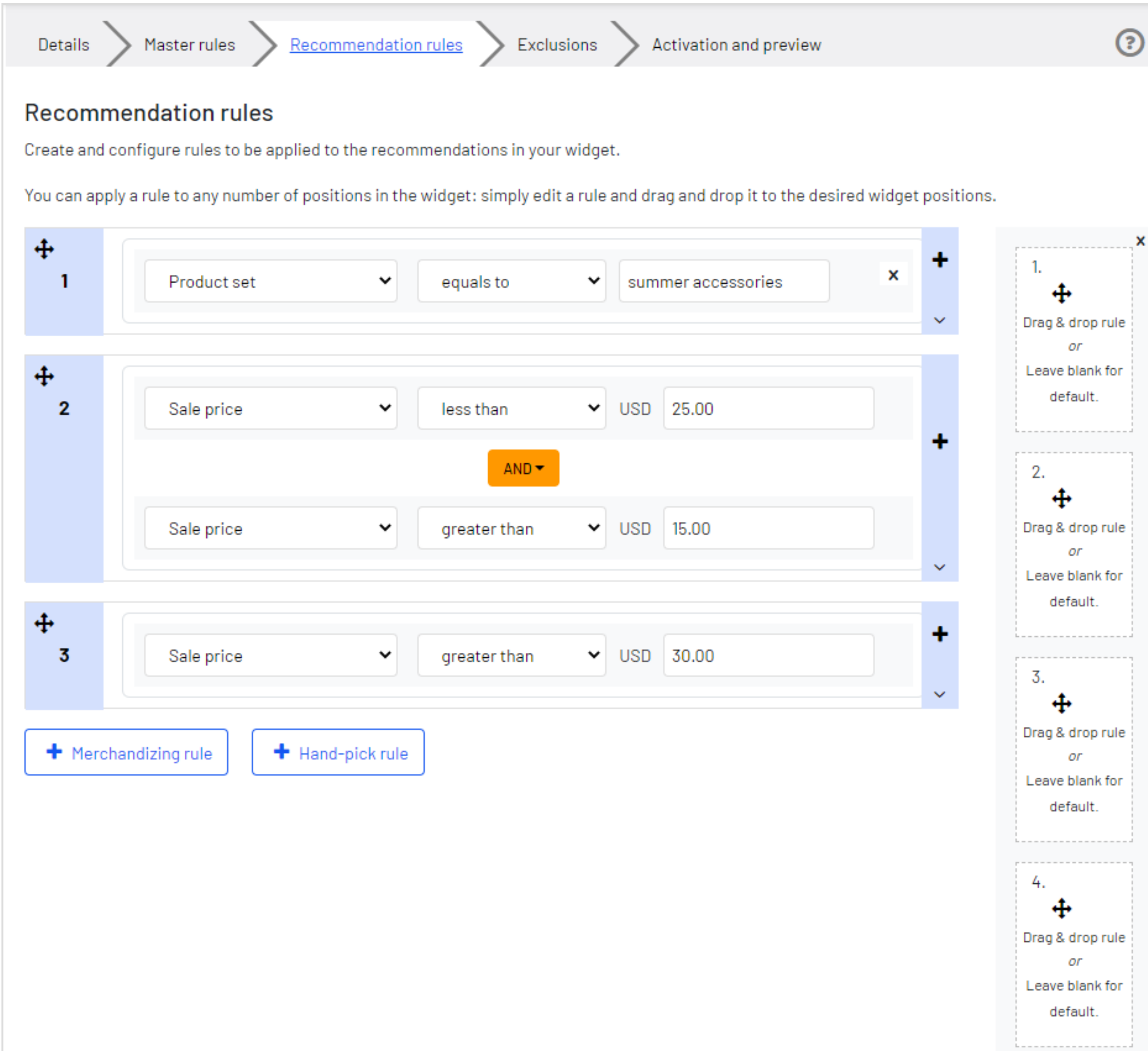


You can add multiple rules by clicking the **Add group** or **+**. When using multiple rules you can choose how you want them to interact by setting the **AND** or **OR** operator.

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

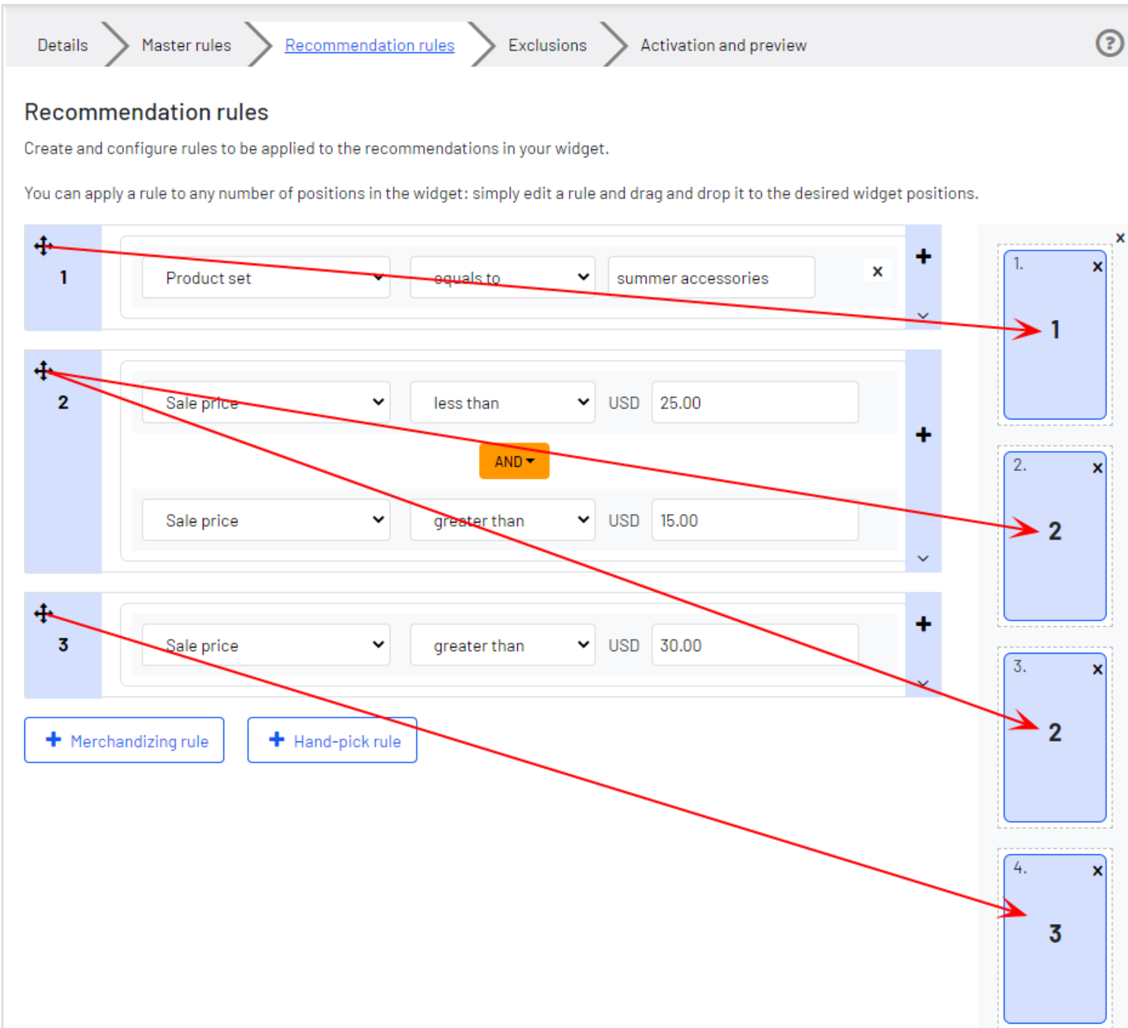
Defining product recommendation rules

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 Episerver algorithms.

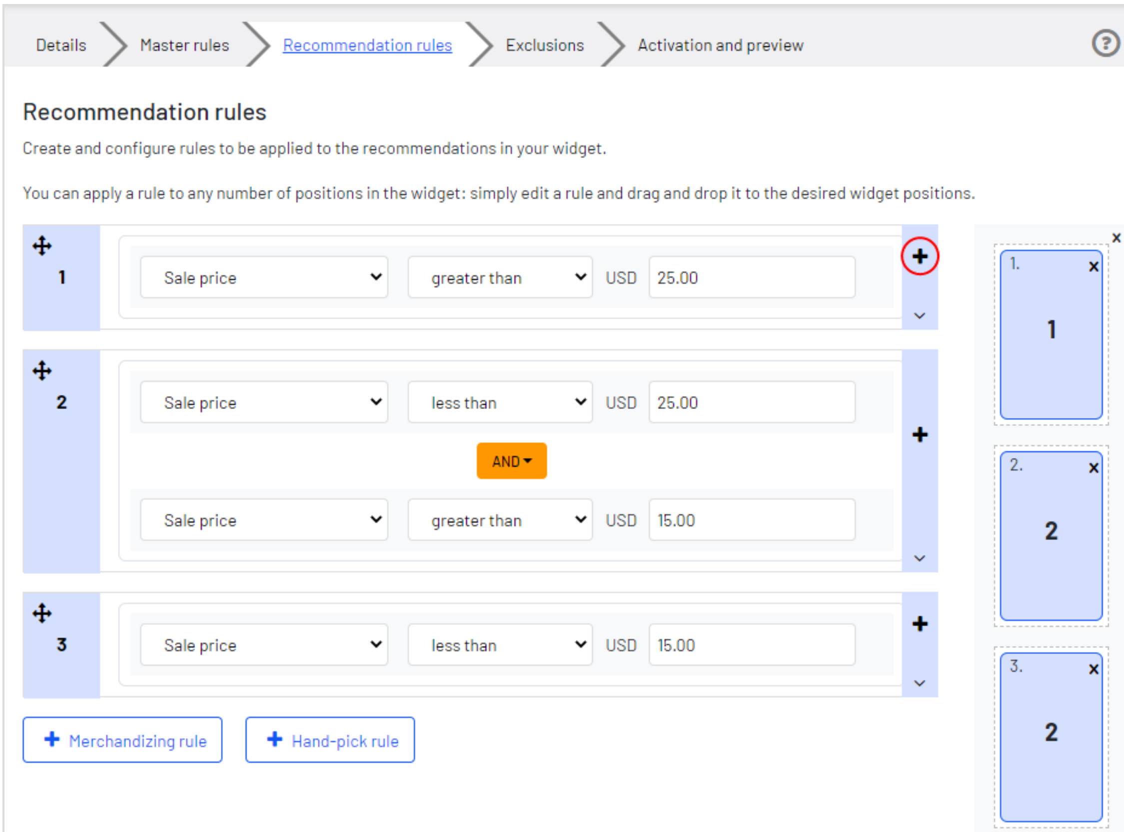


- Click **Merchandising rule** to add another recommendation rule. Only products that match the recommendation rule and the Episerver algorithms are displayed.
- Click **Hand-pick rule** to create a rule that overrides the recommendation rule when a specific product is viewed. The product recommendations are displayed regardless of the recommendation rule and the Episerver 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

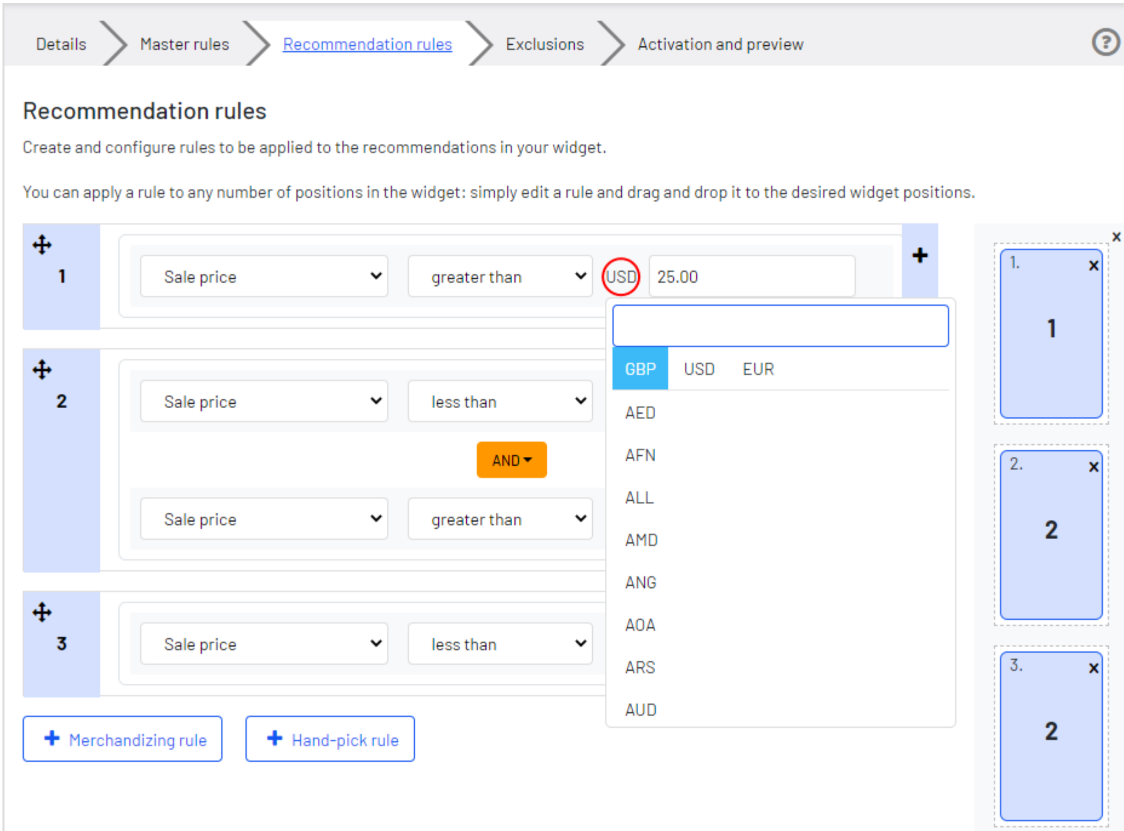
applied to product position 1, and rule 2 applied to product position 2 and 3 and rule 3 applied to position 4. You can apply the same rule to more than one product position. If you want the same rule to apply to all products in a widget, click **Apply to all**.



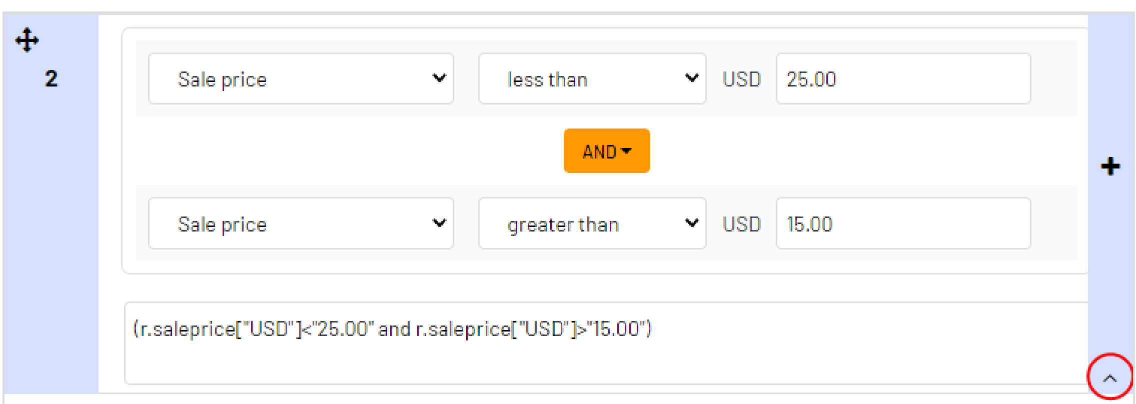
- You can add more than one rule to the same Product Recommendations campaign, if want to apply different rules to different positions in the same widget. For example, you can apply rules for the first product to have a sale price of **25.00** or more, the second product between **15.00** and **24.99**, and the third product under **15.00**. To add another rule, click **+**.


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
Sale price
greater than
USD
25.00
2
Sale price
less than
USD
25.00
AND
Sale price
greater than
USD
15.00
3
Sale price
less than
USD
15.00
Merchandizing rule
Hand-pick rule
1.
1
2.
2
3.
2

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



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

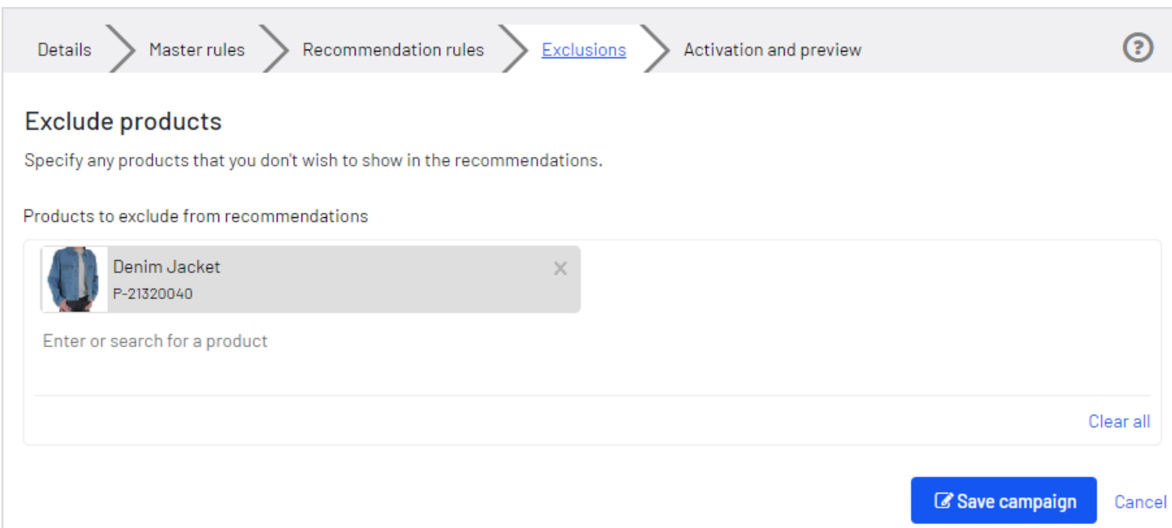


Applying exclusions

> Tip: Exclusions are optional.

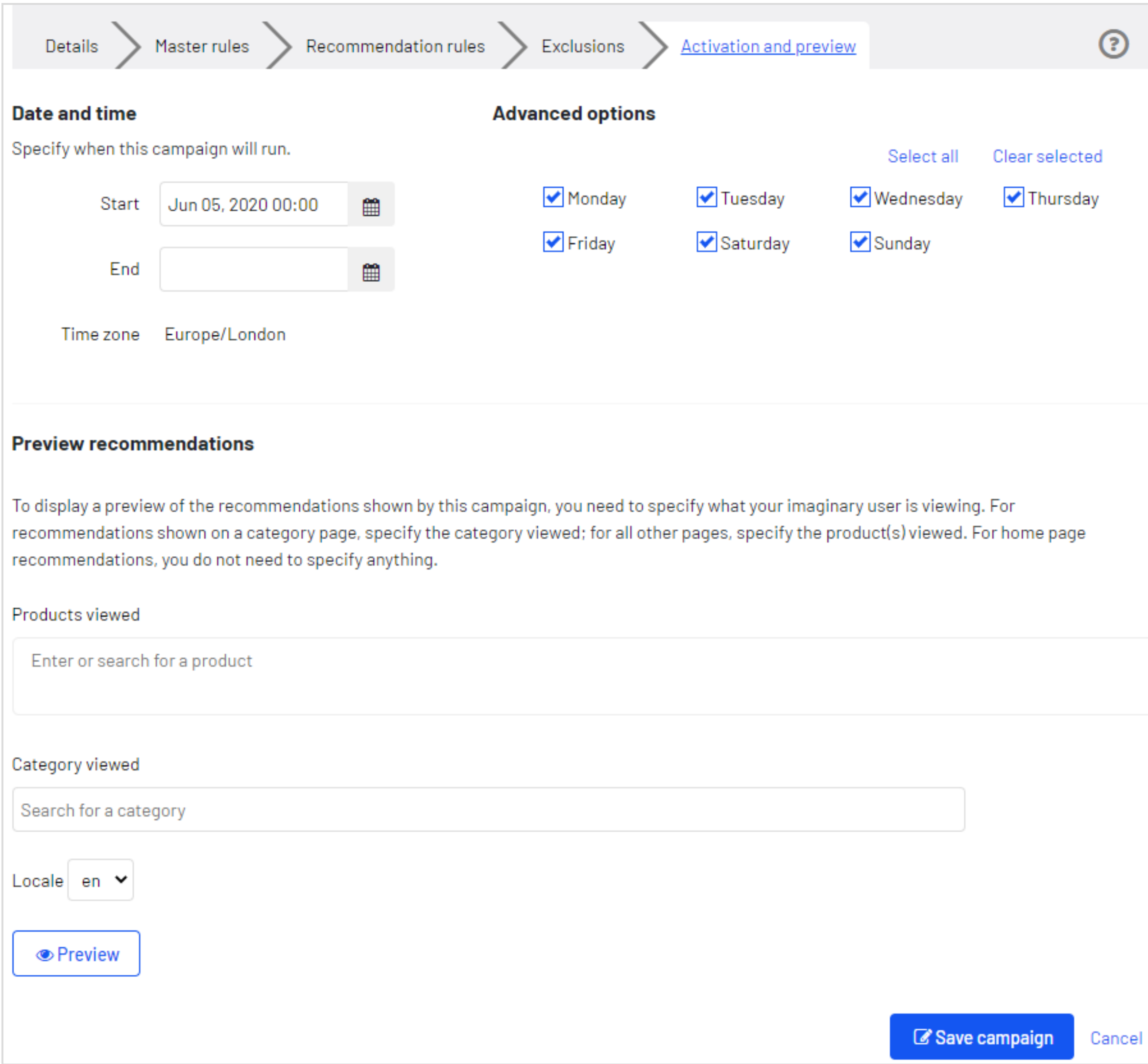
This feature lets you specify products that you do not want to show in the widget specified in the Product Recommendations campaign (in the **Details** tab). For example, you set up a product recommendation rule to show products from a specific brand – *BRAND1* – but there are some products from *BRAND1*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

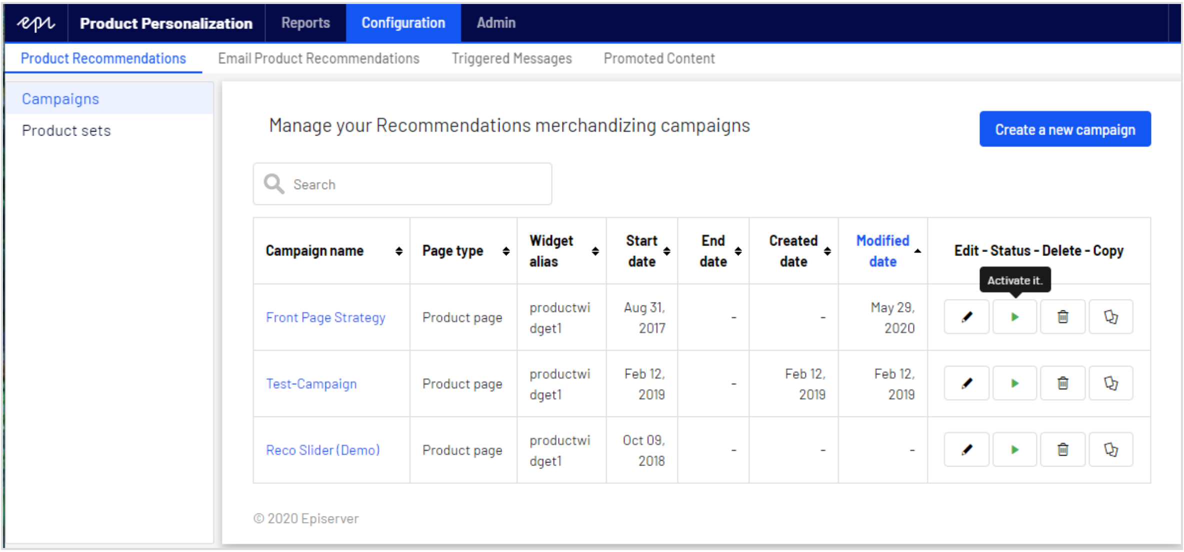


Activating and previewing product recommendations

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.



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 recommendation reports

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

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

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

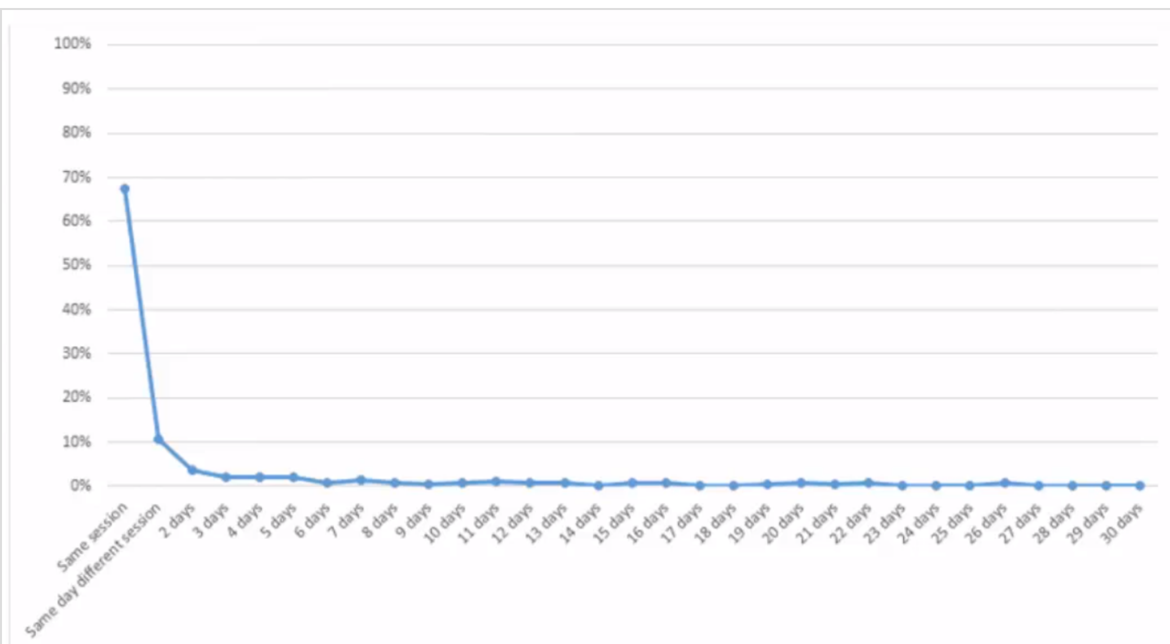
The Product Recommendations attribution model is the industry standard. If a visitor visits your site and clicks on a product recommendation, and then returns to the site within 30 days and buys the product they clicked and converted on, then full attribution for the conversion is given to Product Recommendations.

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.

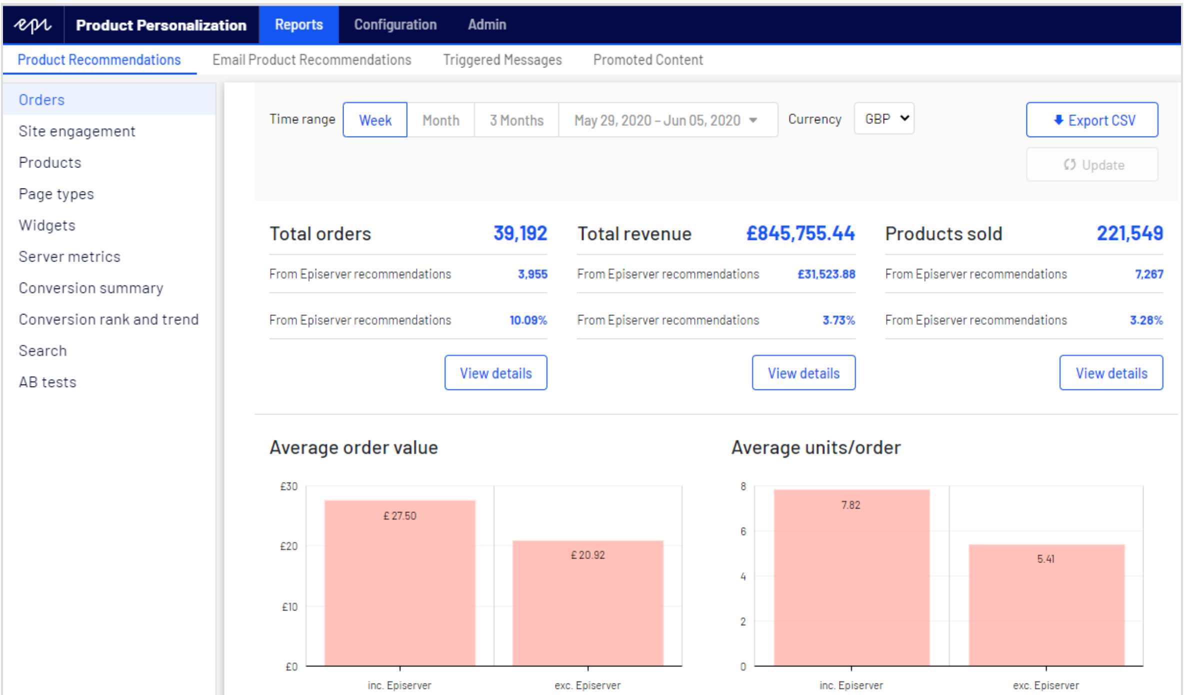
Product Recommendations can produce a graph that plots attribution against time. This shows when most people convert after being shown a product recommendation. The metrics used are CPC (click to purchase conversion) against time. On average, 85% of conversions occur within 24 hours.



Orders tab

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

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

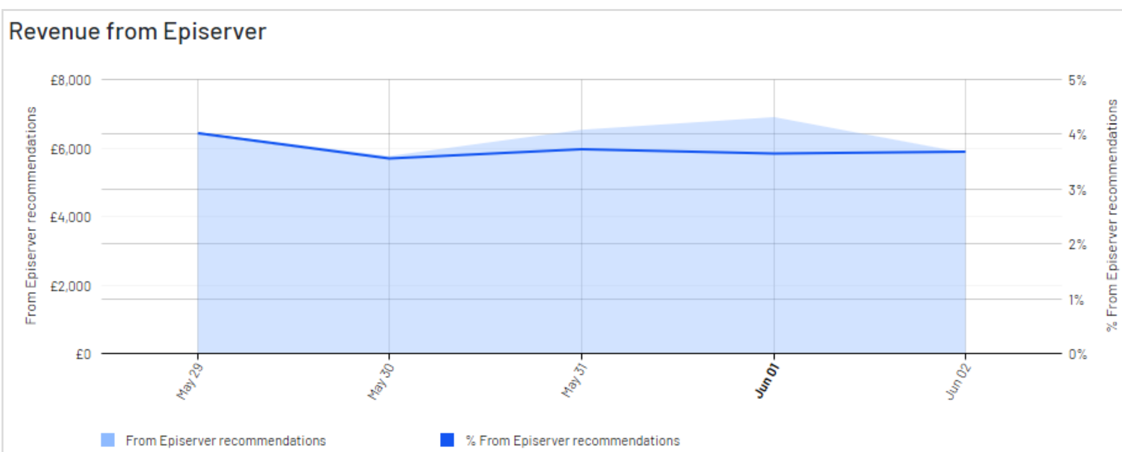


- **Time range**. At the top of the page you can choose the time range for the reports. **Week** is the default selection, which shows information from the past 7 days. You can also choose **Month**, **3 Months** or a custom time range. When you change the time range, click **Update** to refresh the 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.
  - **Episerver Recommendations**. The number of orders in which an Episerver product recommendation was purchased.
  - **Average percentage from Episerver recommendations**. The percentage of orders in which an Episerver product recommendation was purchased.
- **Total revenue**.
  - **From Episerver 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 Episerver recommendations**. Shows the percentage of total revenue from Episerver Product Recommendations.

- **Products sold**. Shows the total number of units sold on the site.
  - **From Episerver recommendations**. Shows the revenue generated from products bought through Product Recommendations.
  - **Average % from Episerver recommendations**. Shows the average percentage of products sold from Episerver Product Recommendations.

- **Average order value**. Shows the average value of orders that contained an Episerver 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 Episerver product recommendation compared to those that did not.
- **Recommendation revenue from Episerver**. 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

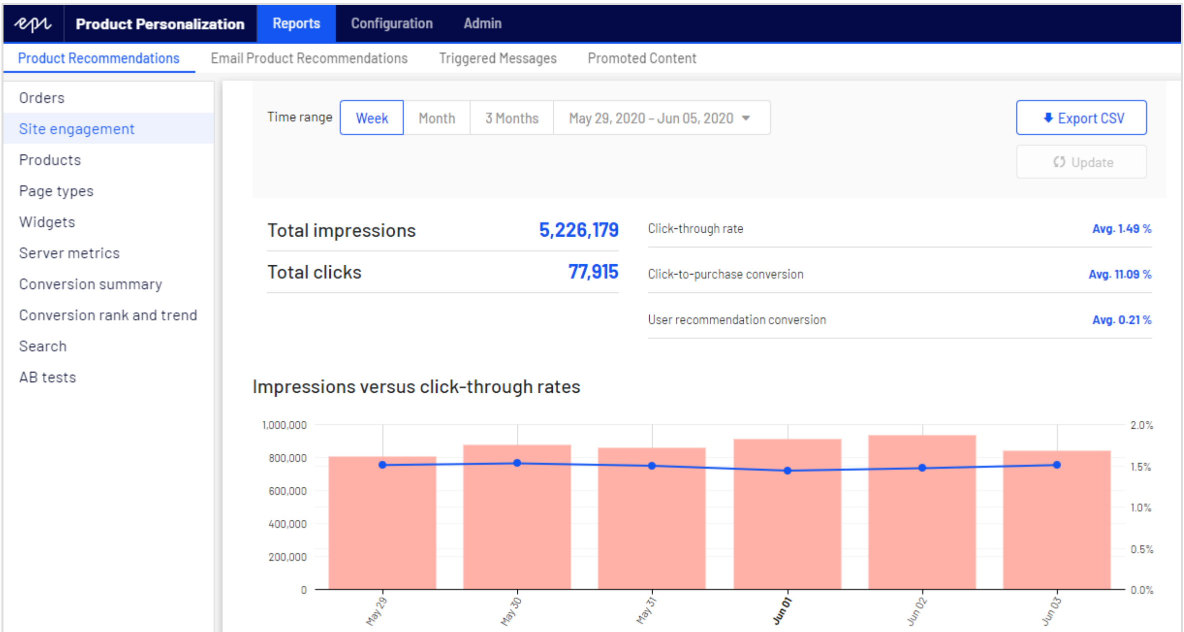
Total orders	From Episerver recommendations	% From Episerver recommendations
39,192	3,955	10.09 %

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 %

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

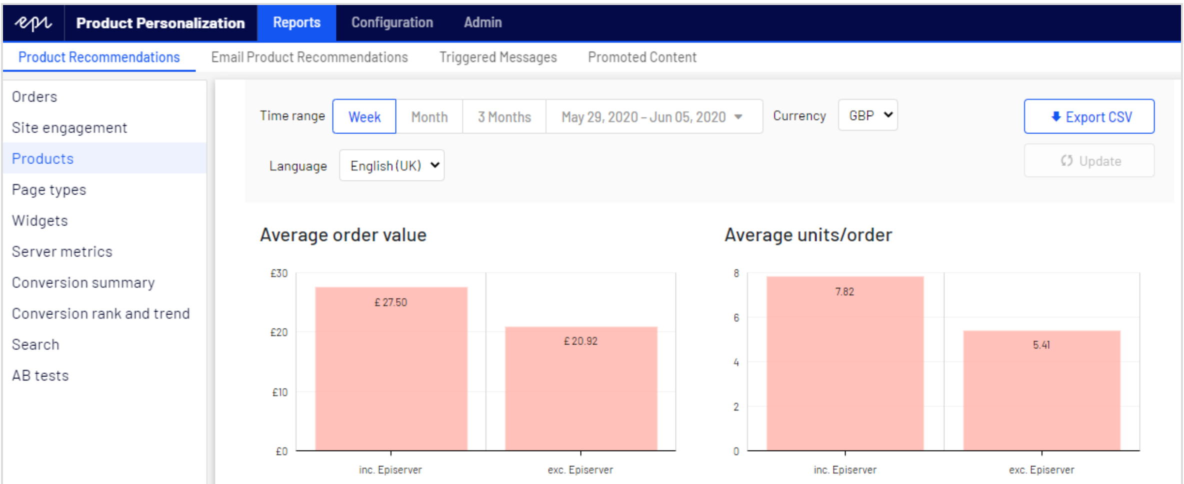
- **Site Engagement data table**. You can organize the data by the following columns.

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 %

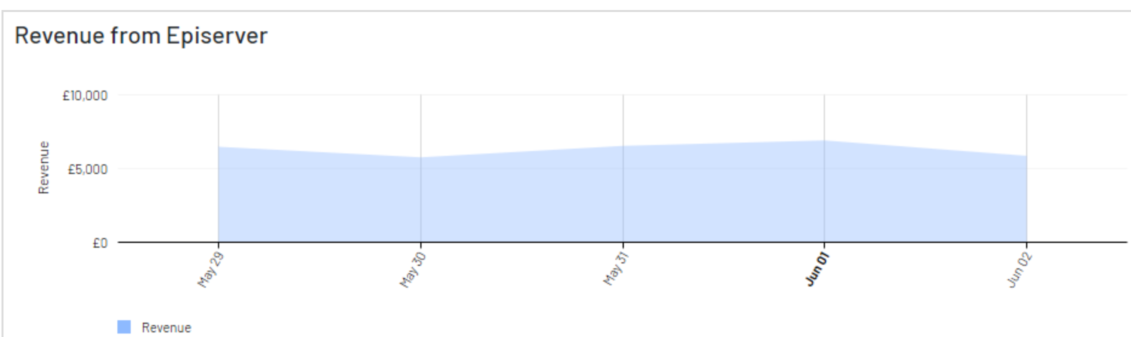
    - Date
    - Total number of impressions
    - Total number of clicks
    - Percentage of product recommendations that were clicked
    - Percentage of purchased product recommendations after having been clicked on
    - Percentage of unique visitors who purchased from product recommendations versus 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 Episerver 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 Episerver product recommendation, compared to those that did not, again over the specified period.
- **Revenue from Episerver**. Shows revenue generated from Episerver 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

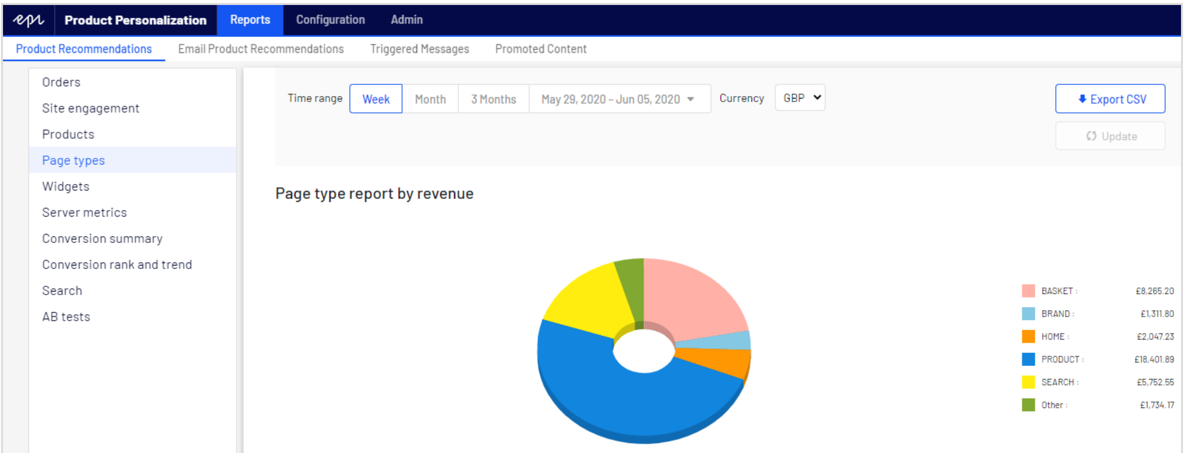
#	Product Ref.	Title	Total units sold	Recommendation based units	Total revenue	Recommendation based revenue
1	654050	Maybelline Age Rewind Eye Concealer Light 6.8ml, Nude	1,045	125	£5,439.58	£667.64
2	716130	Makeup Revolution Luxury Banana Powder	552	130	£2,505.64	£592.98
3	726250	Real Techniques Prep & 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

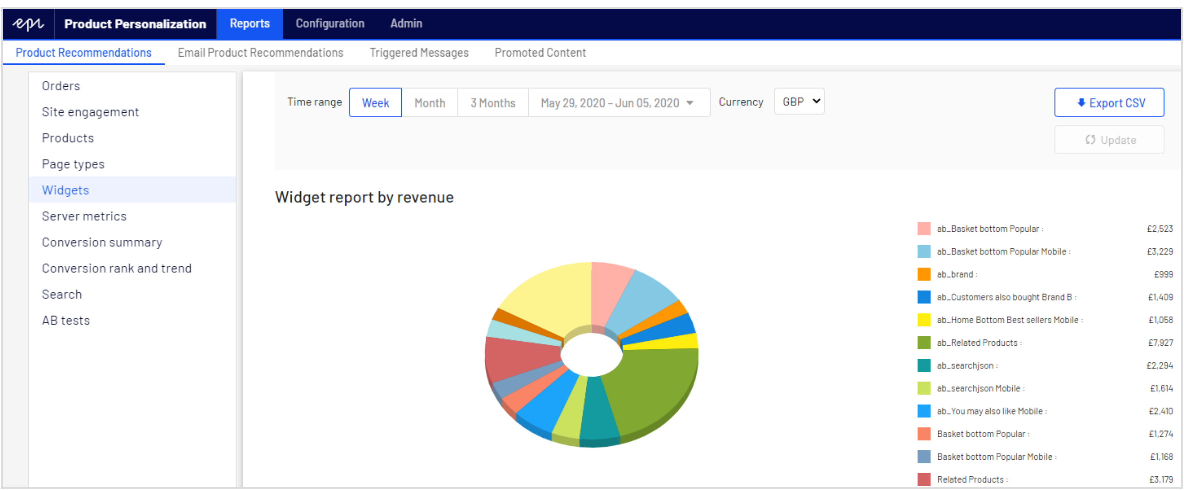
Page type	Impressions	Clicks	CTR	Items bought	CTP	Revenue
Favourites	0	0	0.00%	1	0.00%	£3.49
Wish List	7,976	105	1.32%	8	7.62%	£41.73
My Account B	0	0	0.00%	20	0.00%	£97.50
My Account	0	0	0.00%	80	0.00%	£409.76
Category	957,380	1,076	0.11%	133	12.36%	£515.85
Order Confirmation	39,593	803	2.03%	202	25.16%	£665.84
Home	763,631	5,174	0.68%	344	6.65%	£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
favourite	308	-	15	4.87%	1	6.67%	£3.49
wishlist	2,705	-	33	1.22%	3	9.09%	£7.77
ab_wishlist	5,669	-	80	1.41%	5	6.25%	£33.96
orderjson Mobile	5,912	-	88	1.49%	7	7.95%	£36.80
myAccountjson 5recs B	4,850	-	59	1.22%	20	33.90%	£97.50
Home Bottom New	92,021	-	705	0.77%	25	3.55%	£133.88
categoryjson	322,922	-	359	0.11%	37	10.31%	£151.69
ab_orderjson Mobile	13,563	-	230	1.70%	35	15.22%	£158.29
myAccountjson	10,617	-	107	1.01%	47	43.93%	£204.85
myAccountjson Mobile	13,303	-	159	1.20%	33	20.75%	£204.91
orderjson	7,180	-	175	2.44%	73	41.71%	£210.72

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

Server Metrics tab

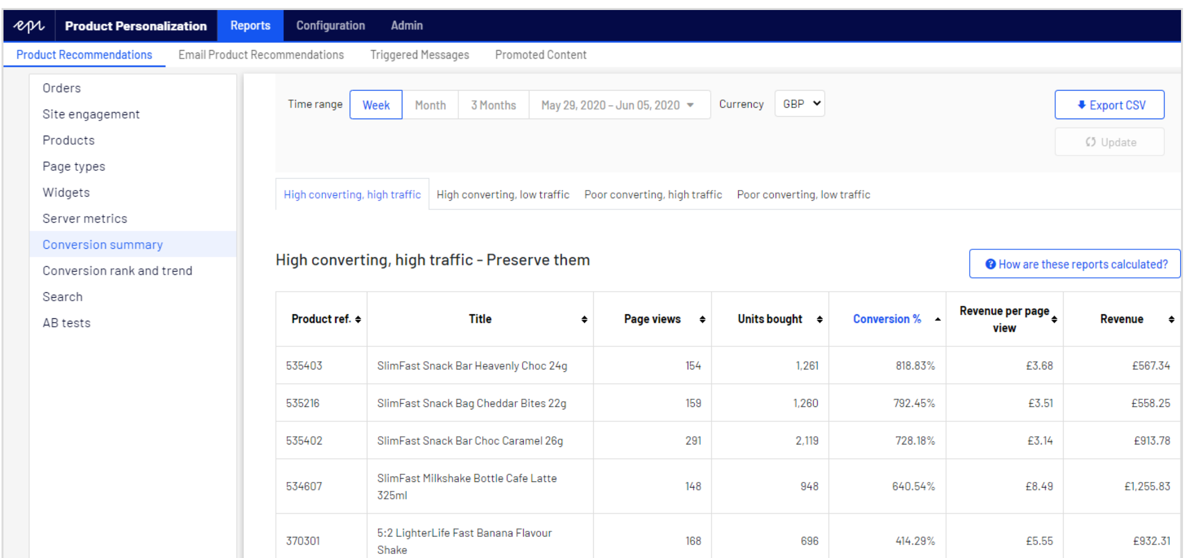
The **Server Metrics** tab shows two graphs:

- 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 siCte and all visitors and all orders.



Conversion definitions

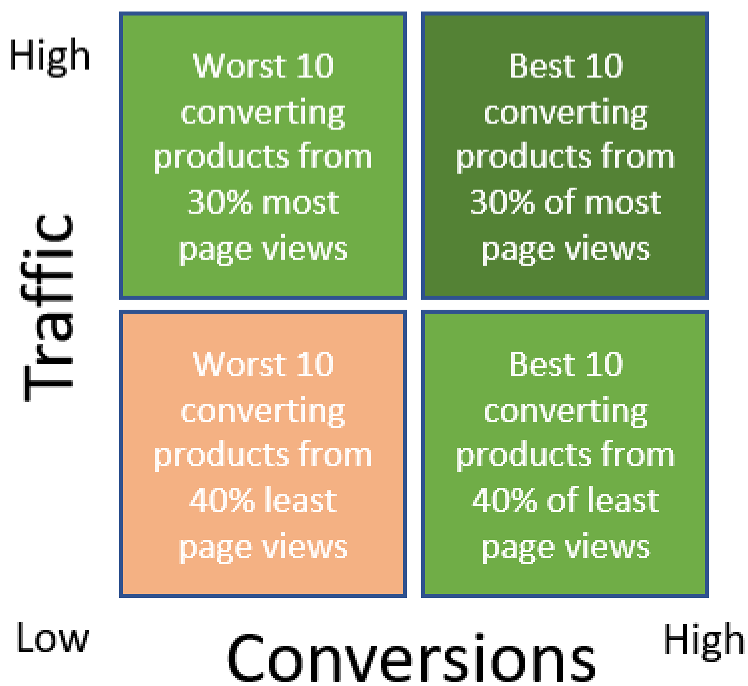
- **High converting**. Any product that is in top 10 of the highest 10% of conversions
- **Low converting**. Any product that is in the lowest 10 of the lowest 10% of conversions.

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.

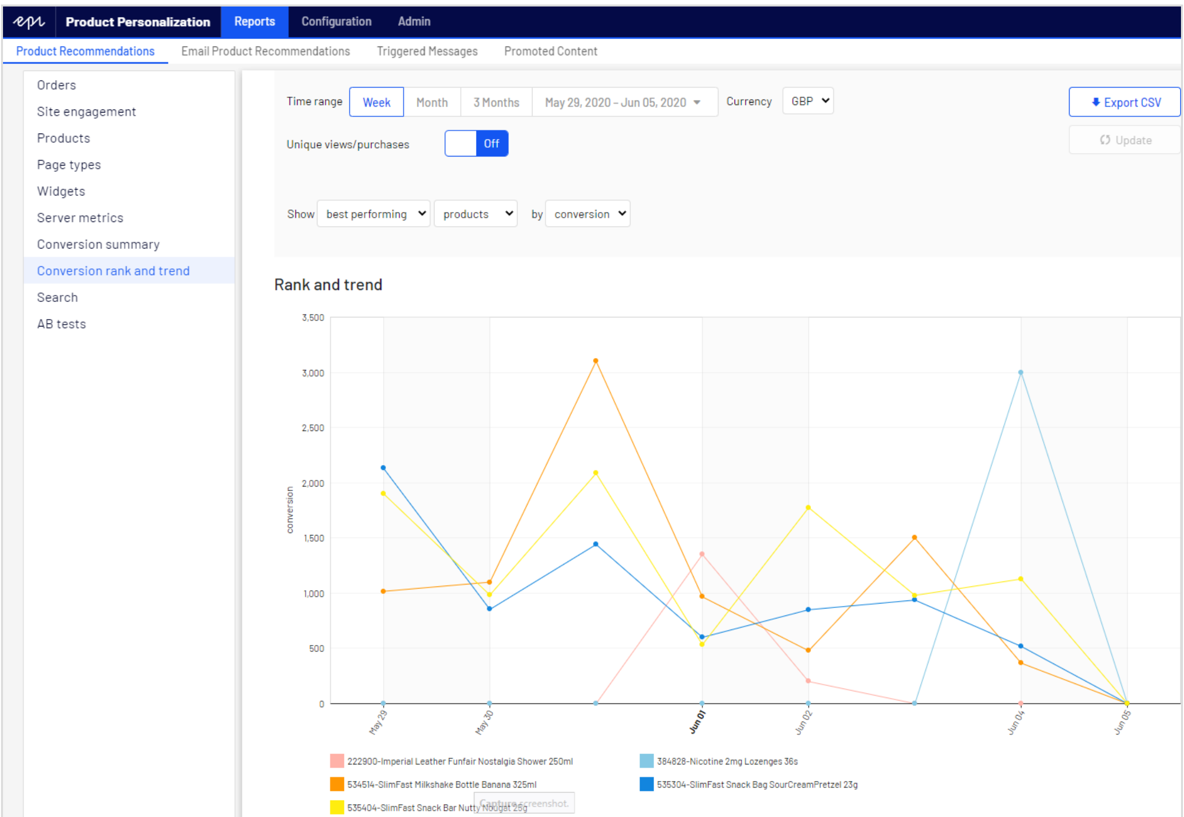
The following list shows the various combination views of conversion data, which are displayed in the tabs on the **Conversion summary** view.

- **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.



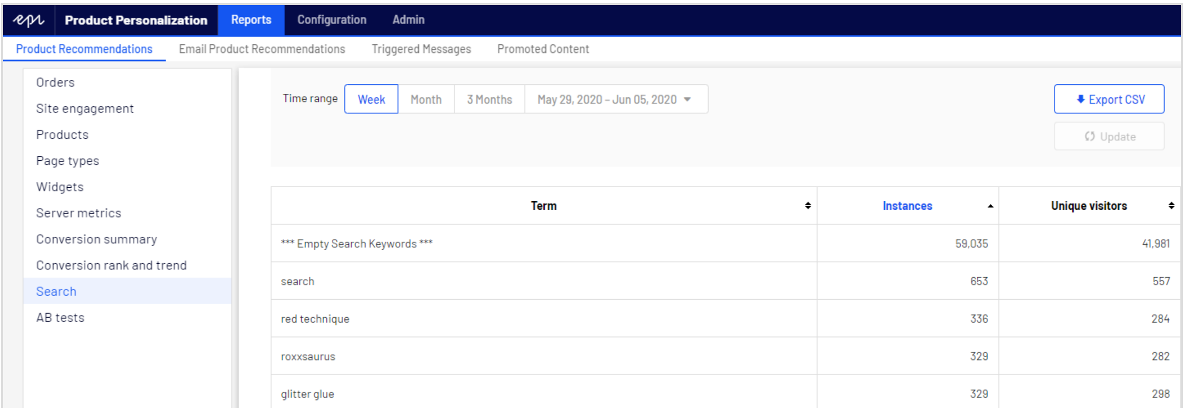
Rank and trend view

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.

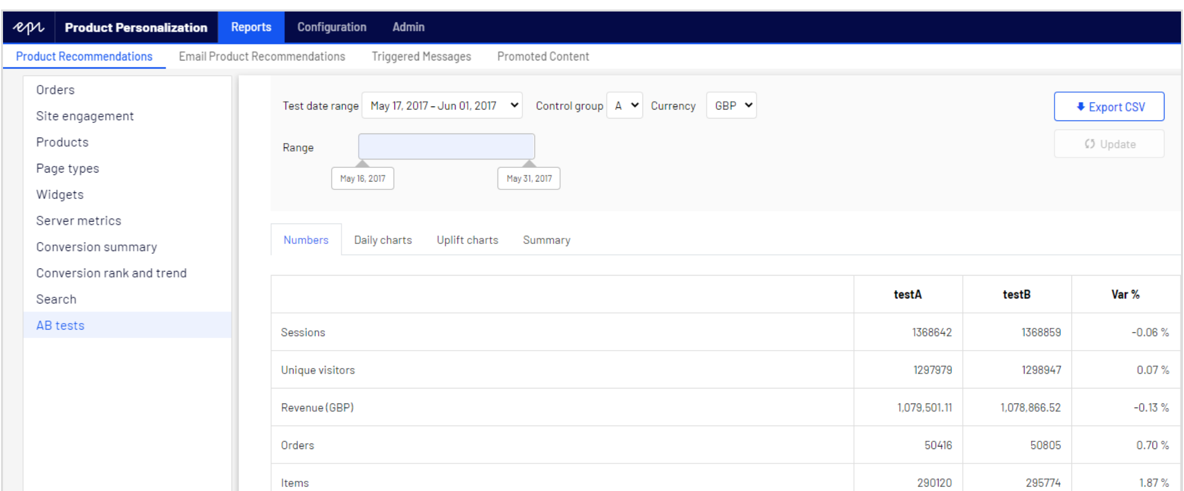


You can sort by the following criteria:

- 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.



You can do the following in the AB tests view.

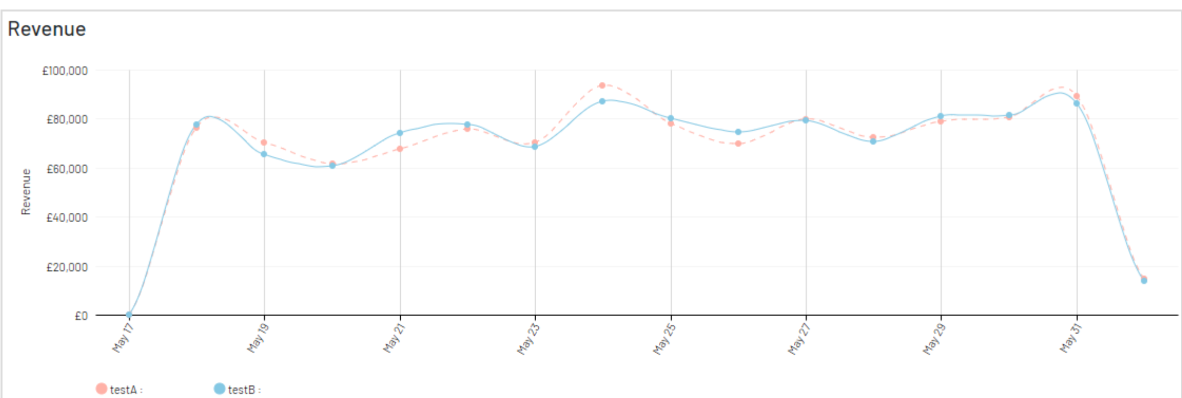
- Filter the results to specific dates by selecting the date range from the range bar.
- Set the control group.

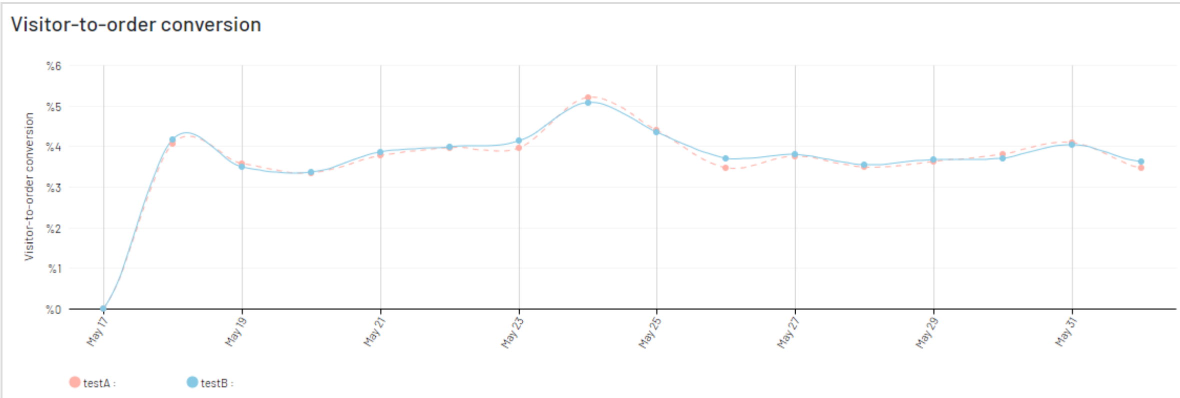
> **Note:** A/B testing supports up to 5 groups so you can view A-to-E testing.

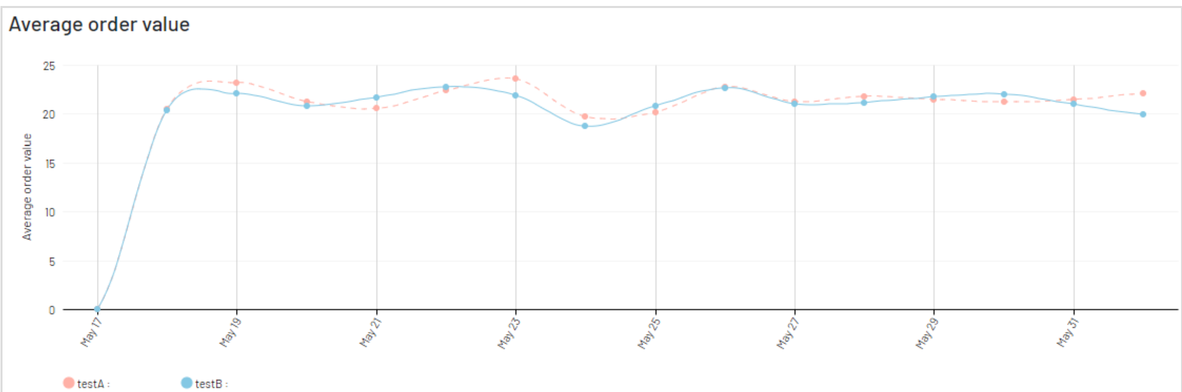
- Select a specific currency that you want to examine.
- In the table you can view and compare key metrics on the site between all test groups, such as:
  - Visitor sessions
  - Site revenue
  - Conversion rate
  - Average order value through average selling price and units per order
  - Recommendation engagement and revenue

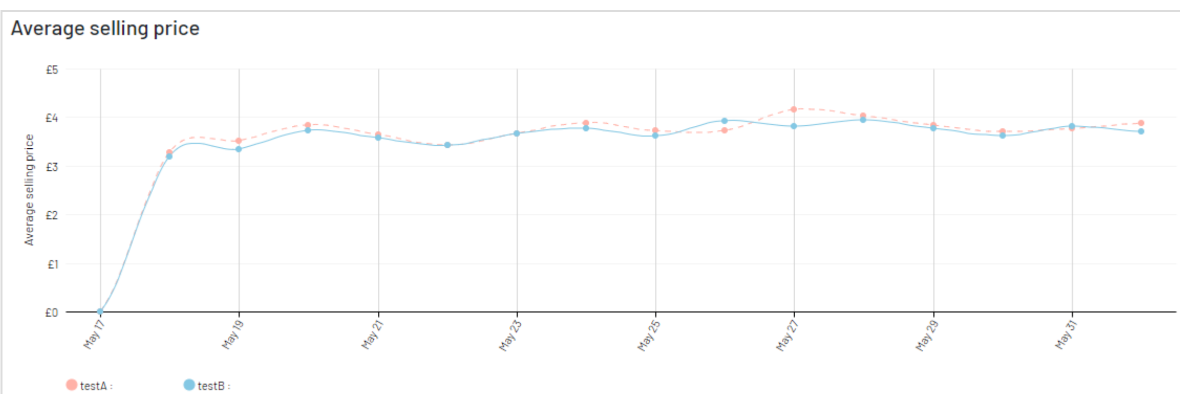
Daily charts

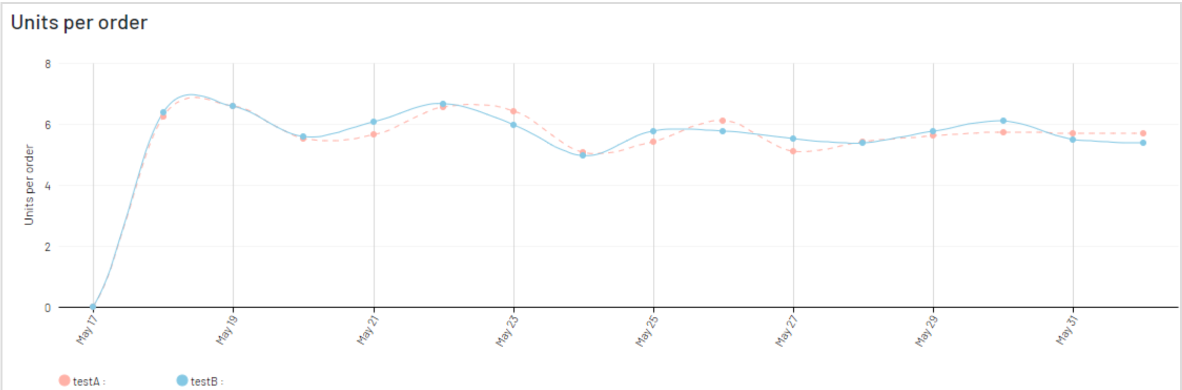
The **Daily Charts** view shows graphs for revenue generated, visitor-to-order conversion rates, average order value, average selling price, average number of units sold, and number of sessions per day on the site.

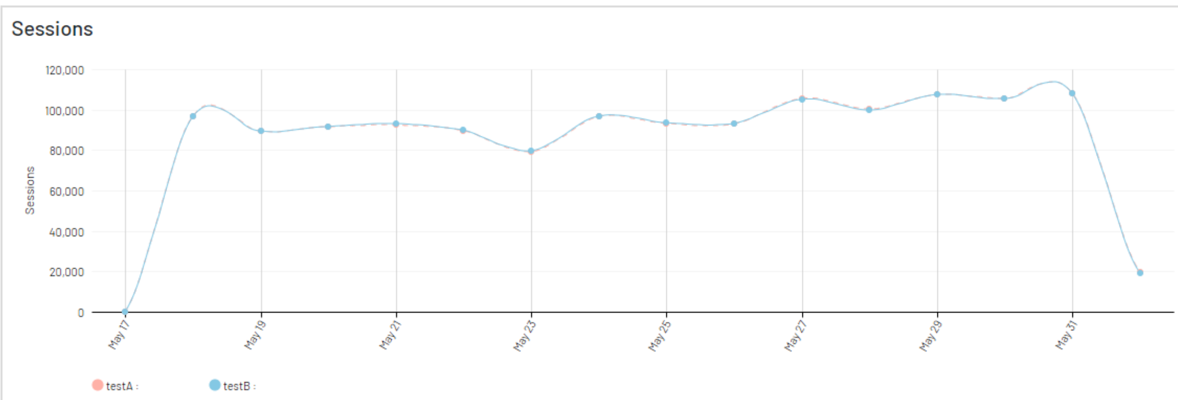



Visitor-to-order conversion
Visitor-to-order conversion
%6
%5
%4
%3
%2
%1
%0
May 17
May 19
May 21
May 23
May 25
May 27
May 29
May 31
testA :
testB :


Average order value
Average order value
25
20
15
10
5
0
May 17
May 19
May 21
May 23
May 25
May 27
May 29
May 31
testA :
testB :

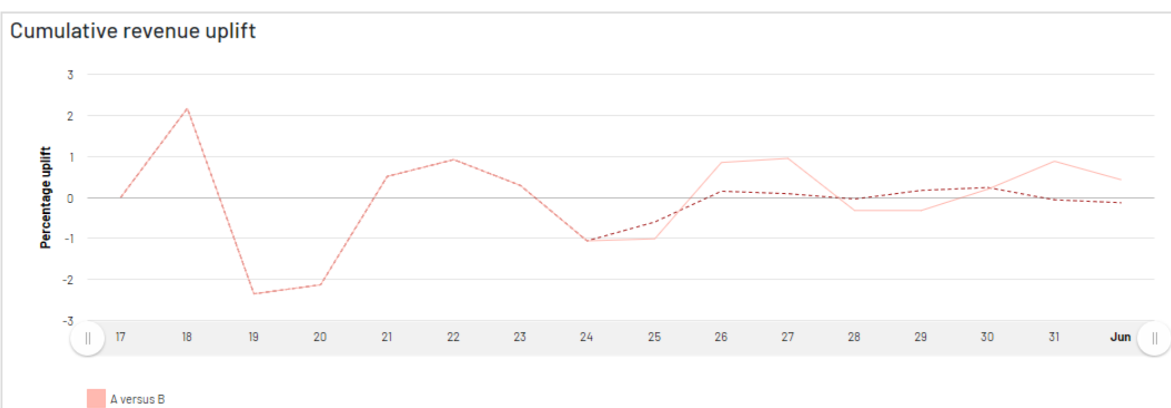

Average selling price
Average selling price
£5
£4
£3
£2
£1
£0
May 17
May 19
May 21
May 23
May 25
May 27
May 29
May 31
testA :
testB :

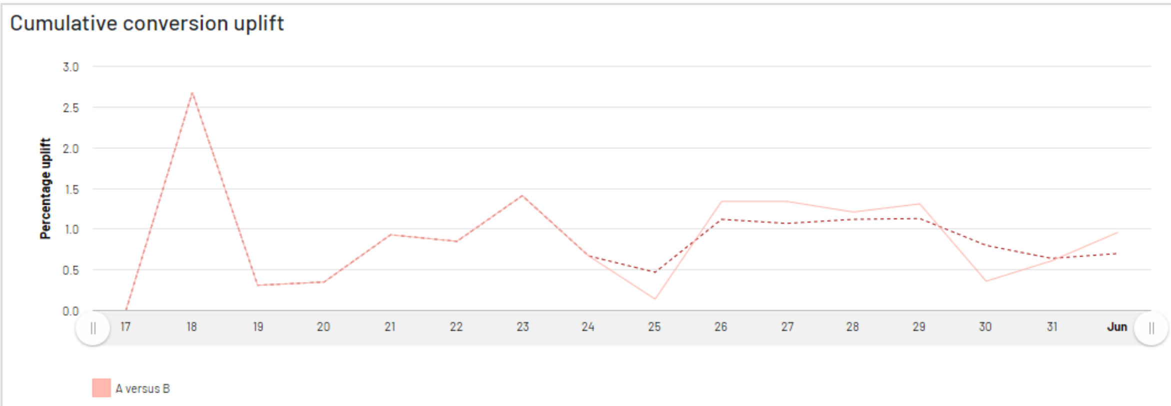


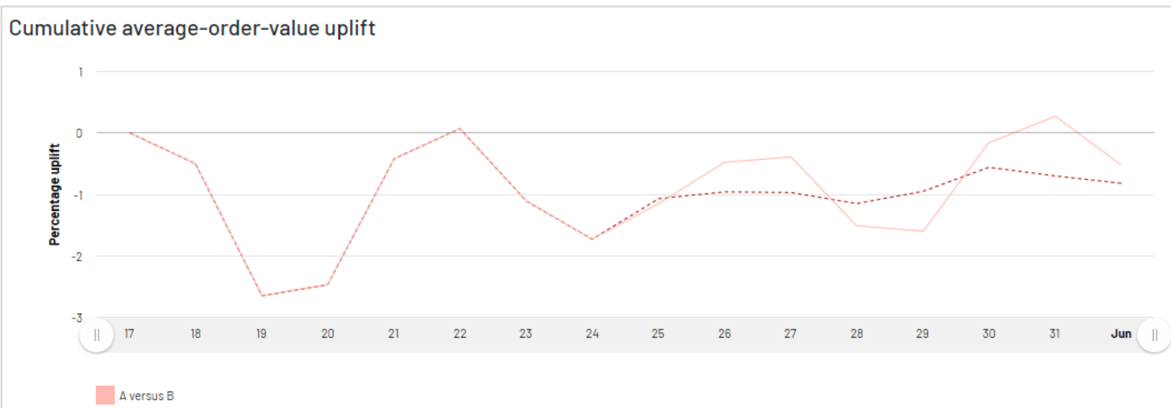


Uplift charts

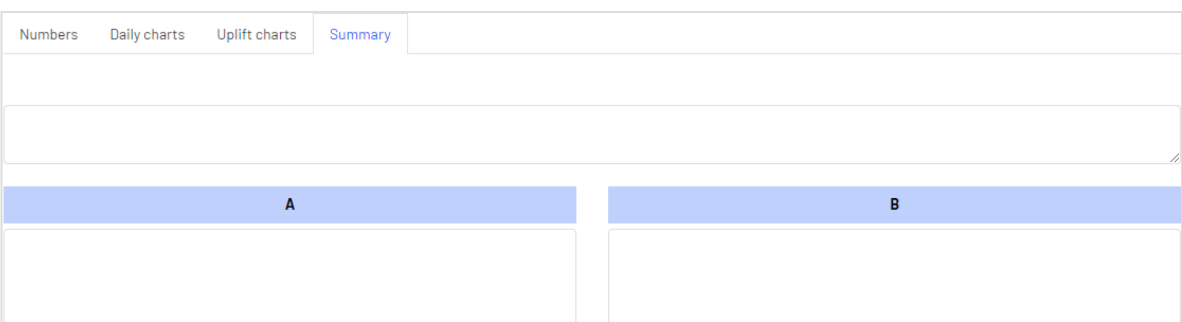
The **Uplift charts** view shows graphs displaying the revenue, conversion, and average order uplift value for a chosen test group versus the control group for the selected date range (which is cumulative) and over the past 7 days.




Cumulative conversion uplift
Percentage uplift
3.0
2.5
2.0
1.5
1.0
0.5
0.0
17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 Jun
A versus B


Cumulative average-order-value uplift
Percentage uplift
1
0
-1
-2
-3
17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 Jun
A versus B

Summary tab


Numbers
Daily charts
Uplift charts
Summary
A
B

Email Recommendations

> Note: The Episerver Customer-Centric 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 Episerver 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 campaign 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 Email Product Recommendations strategies.
- 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.

Episerver 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 – Episerver 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.

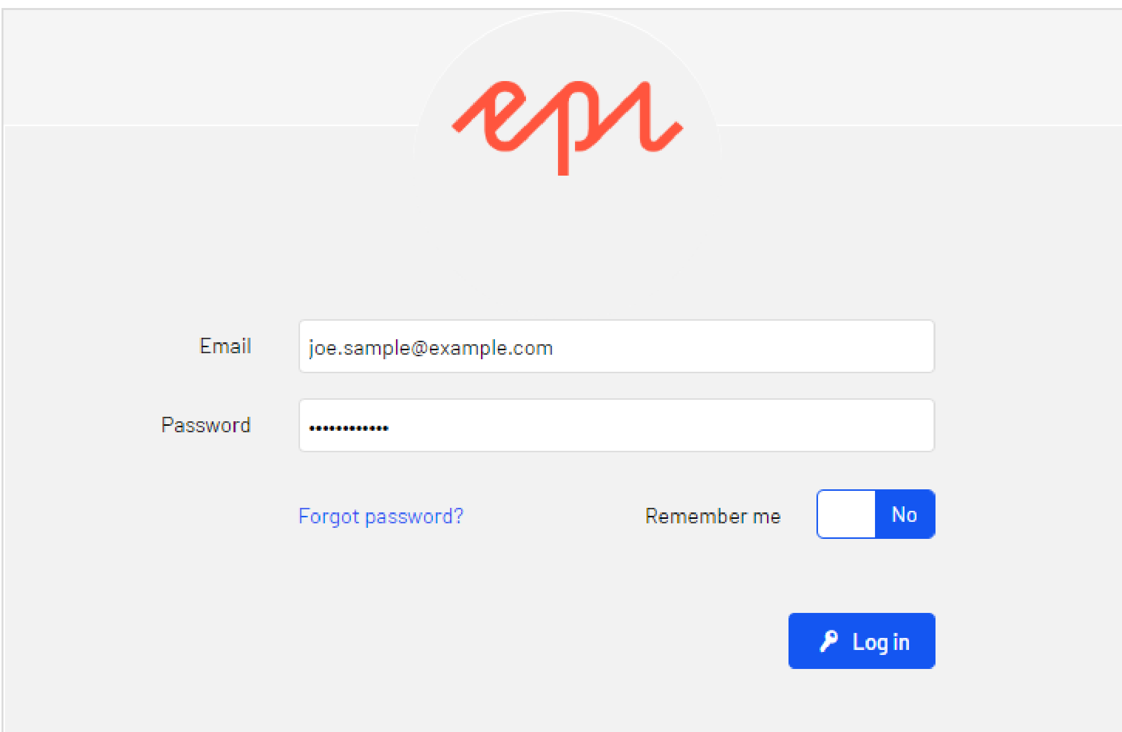
If a visitor connects on another device, Episerver automatically connects the different CUIDs to a single KUID associated with that email address. In this way, personalization works consistently across the devices with which a visitor engages.

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

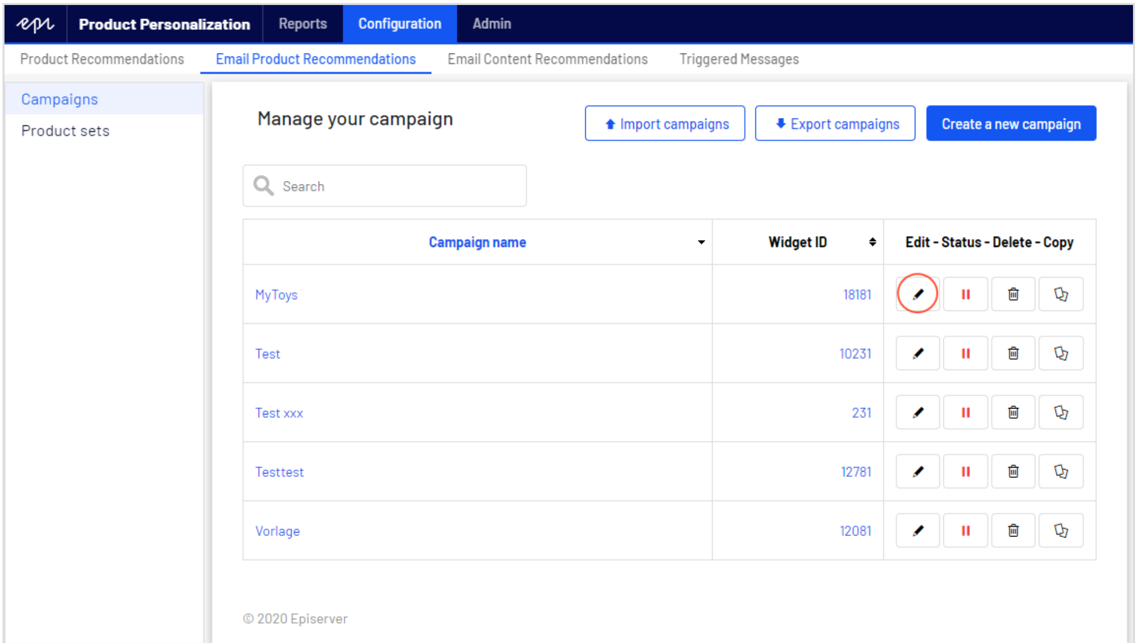
Logging into email recommendations

You can access Email Recommendations through the Episerver 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 developersupport@episerver.com.



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



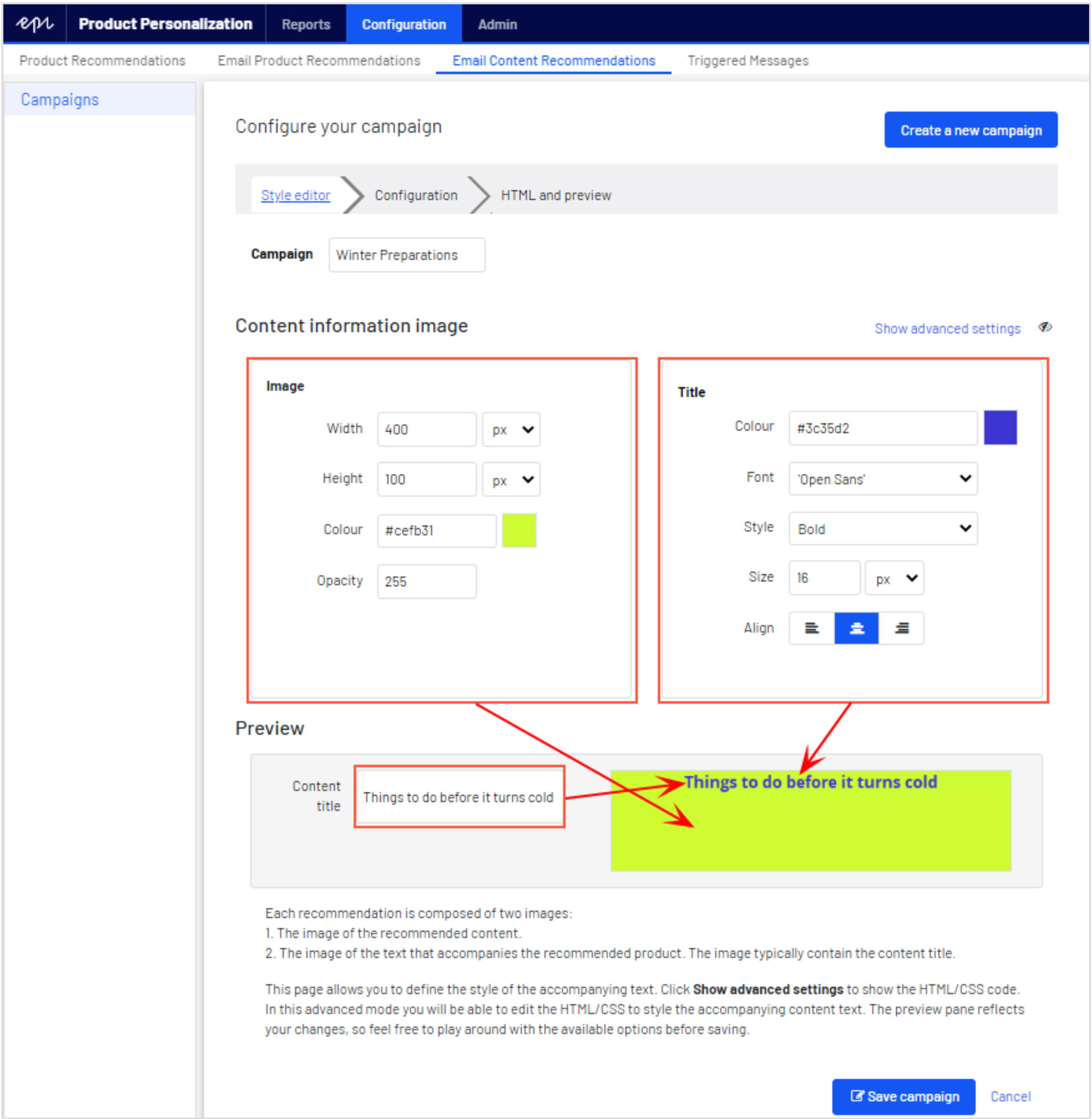
- **Edit**. Click **Edit** or a campaign name to open the configuration page for that campaign.
- **Status**. Click **Activate it** to switch on a campaign or **Pause it** to switch off a campaign.
- **Delete**. Click **Delete** to delete a campaign. A confirmation box appears.
- **Copy**. Click **Copy** 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

To create a new Email Content Recommendations campaign:

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

3. Enter a campaign name, such as *Winter Preparations*.



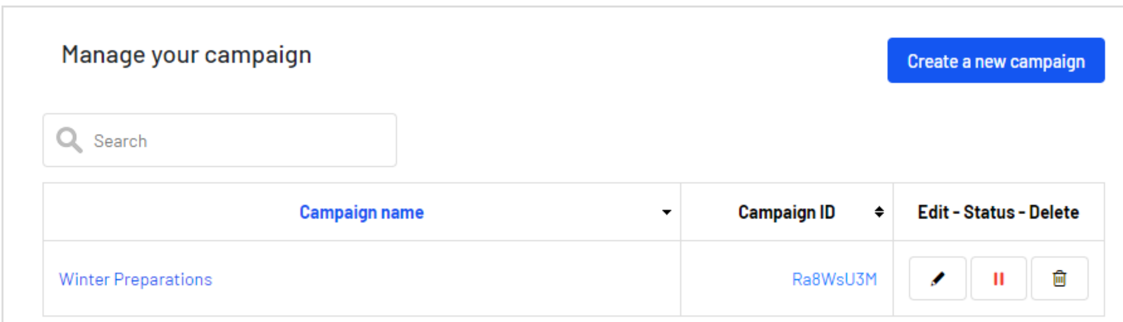
- **Campaign**. The name of your Email Content Recommendations campaign.
- **Image**. Modify the dimensions (number of pixels) and background color (hexadecimal values) of the product information image. **Opacity** modifies the background color so that you can have a transparent background.

> Note: The size of the actual product image will not change

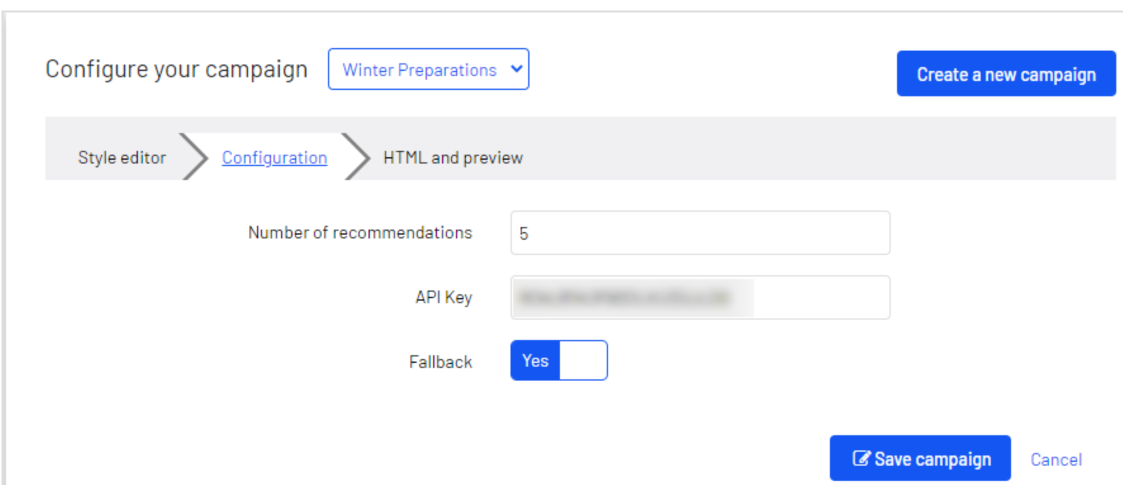
> because that image is delivered with the same size as it is provided from your system to Episerver in the product catalog feed.

- **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.

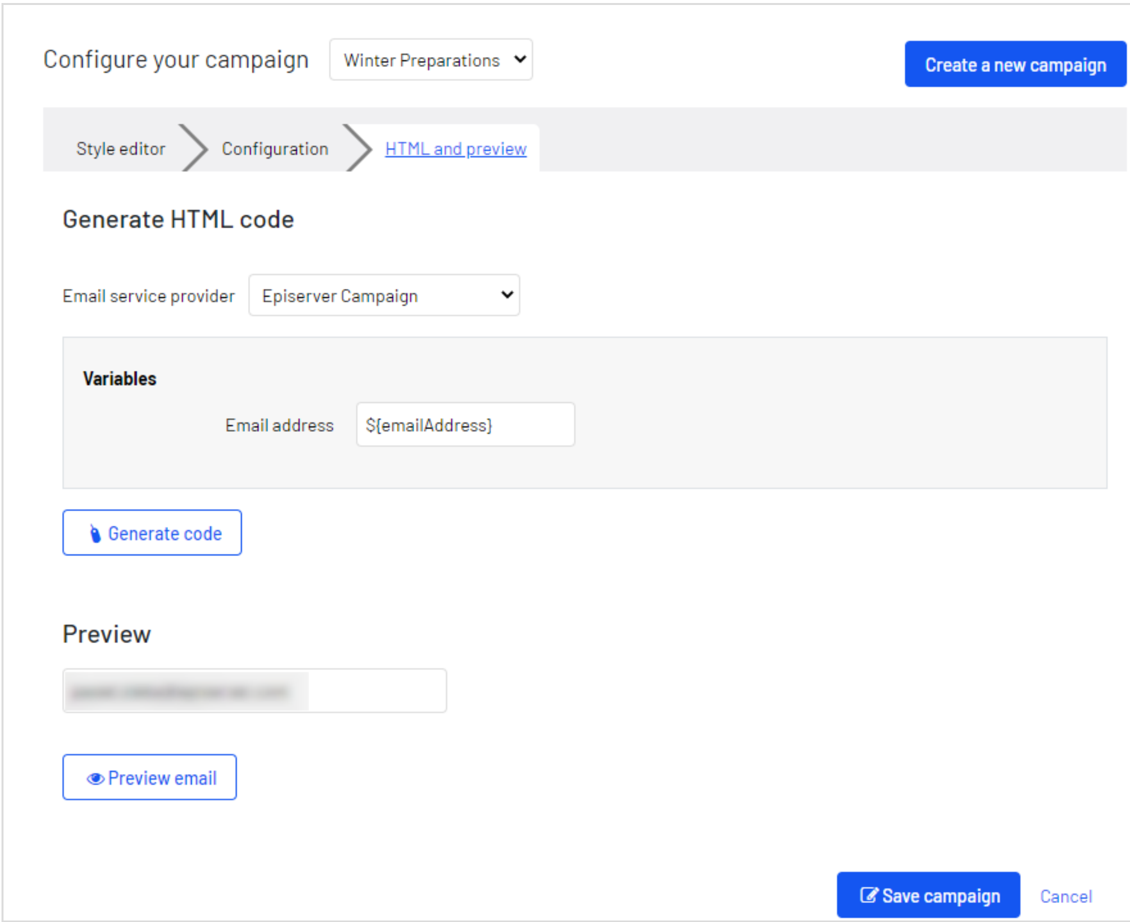
4. Click **Save Campaign**. Your new campaign appears in the list, where you can edit, delete, and copy the sets.



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



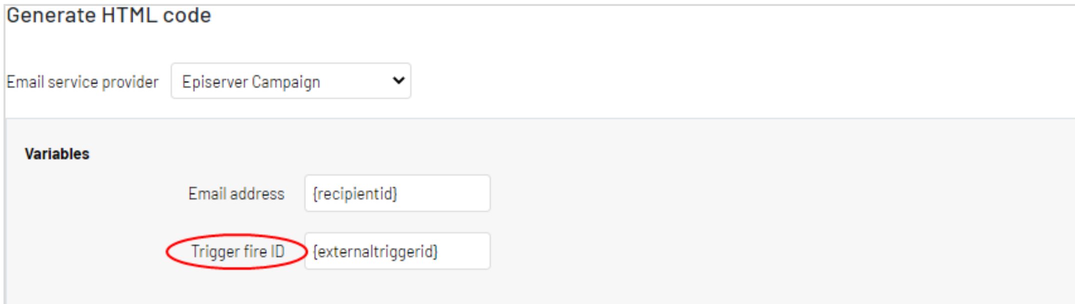
6. In the **HTML and preview step**, you can generate the code that is added to your email template, and preview the output of the Email Content Recommendations widget.



x

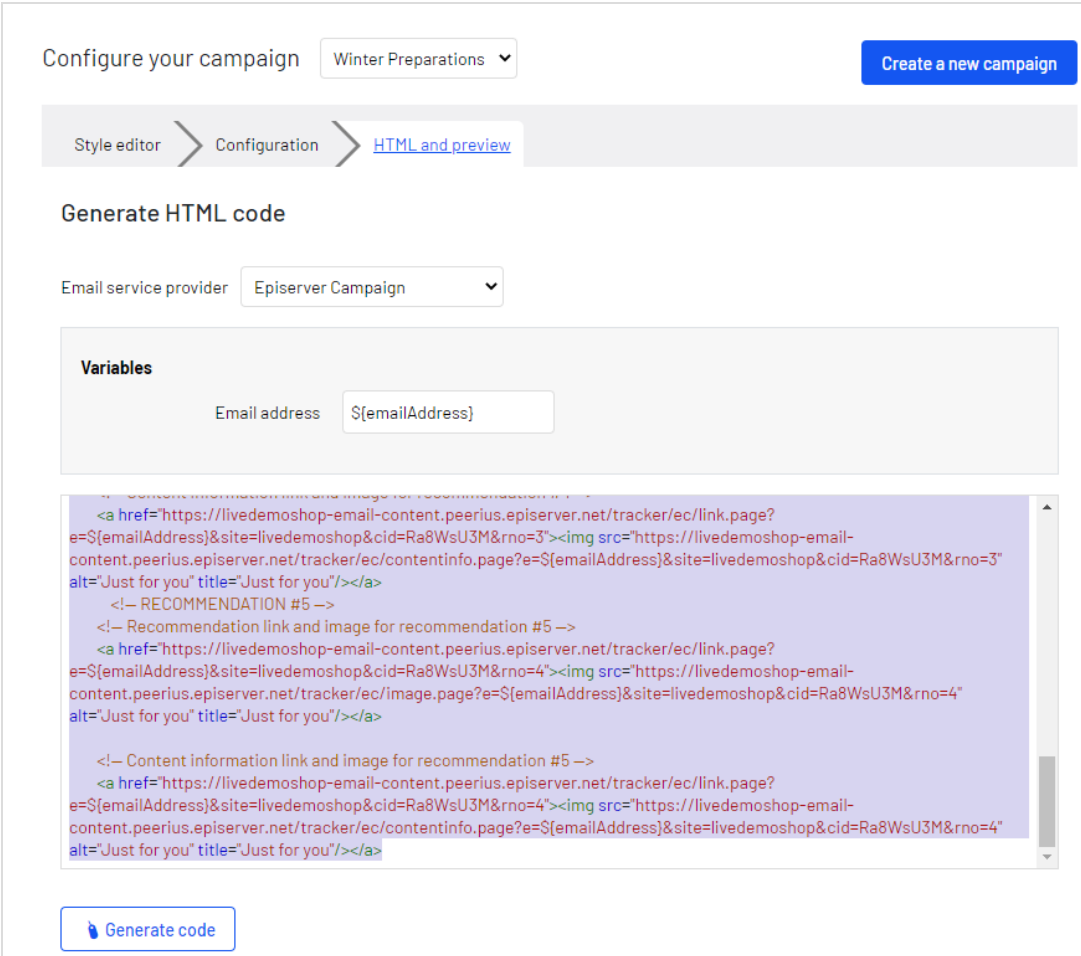
a. Select your ESP from the **Email service provider** drop-down list. **A Variables** section appears.

   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. (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 Content Recommendations campaign, a **Trigger fire ID** variable field will be present.)



Note: The **Email address** variable is required to let Episerver 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, Episerver is not informed of the user's email address, and therefore cannot personalize the recommendations.

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



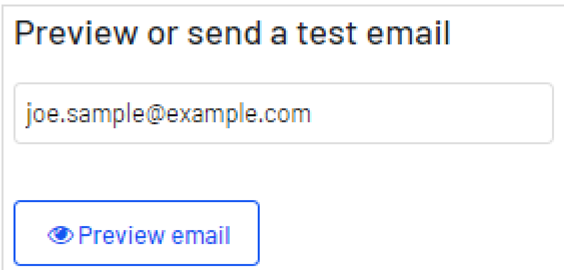
c. Copy and paste the HTML code into your email template to retrieve recommendations.

The generated HTML code is annotated to clearly show the links for each content recommendation.

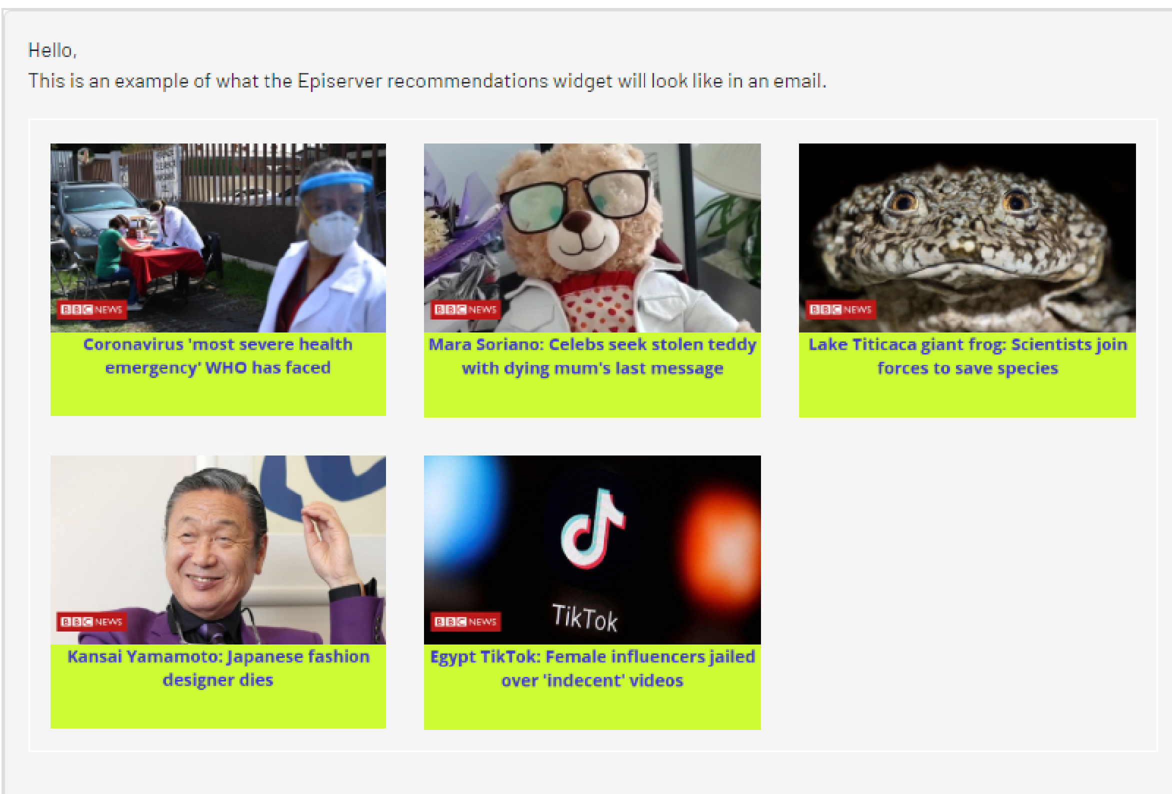
The generated code does not include any other formatting. You can add HTML and CSS in your template to style the recommendations, such as adding them to a table.

Previewing your campaign

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



Creating an Email Product Recommendations campaign

To create an Email Product Recommendations campaign, you can either click **Create a new campaign** from the Email Content Recommendations overview screen, or select the **Mail** > **New campaign** tab. The campaign editing screen appears. 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

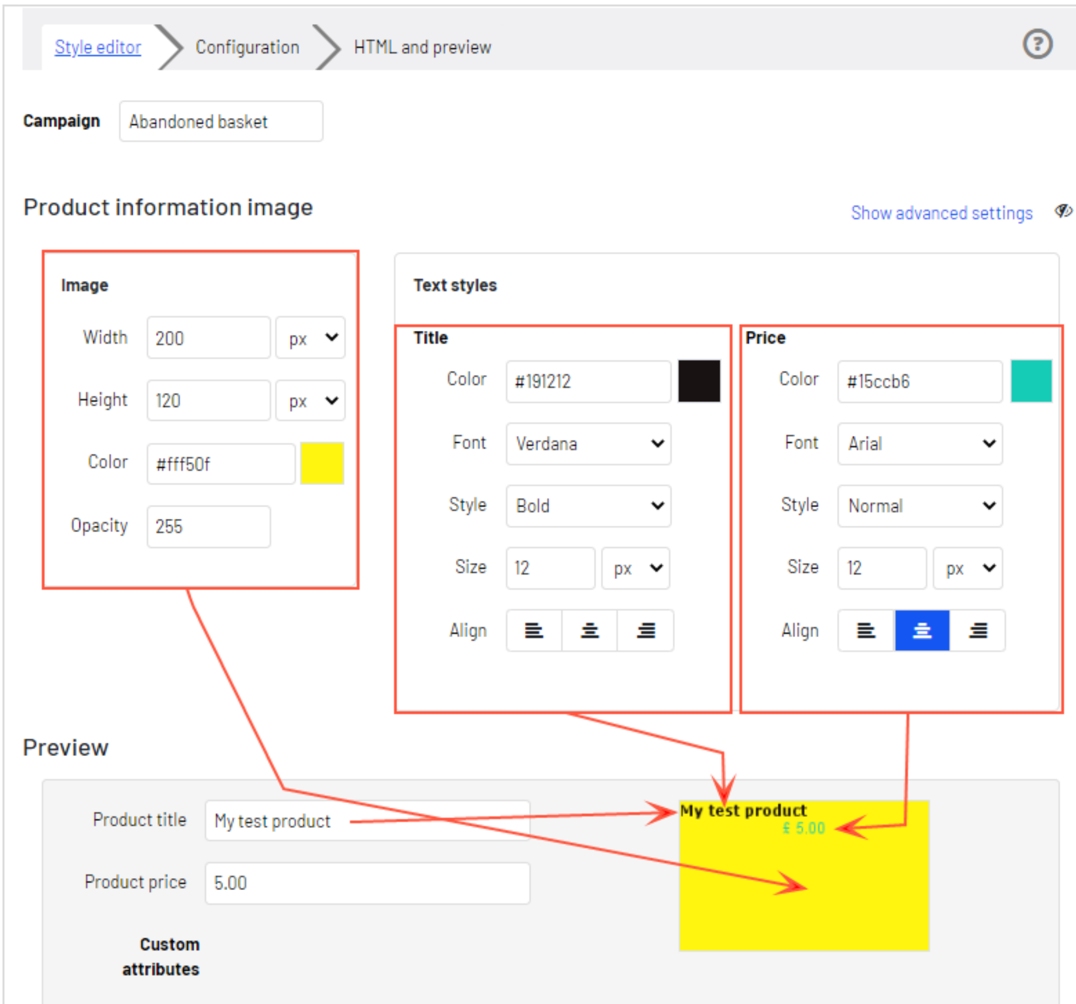
Styling the product information image

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.

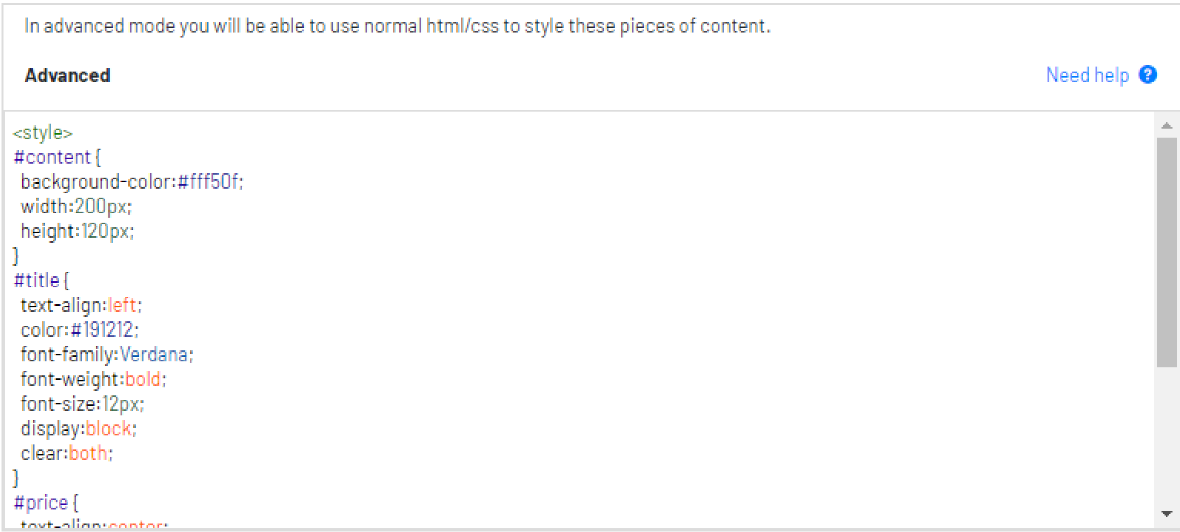
- **Campaign**. The name of your Email Product Recommendations campaign.
- **Image**. Modify the dimensions (number of pixels) and background color (hexadecimal values) of the product information image. **Opacity** modifies the background color so that you can have a transparent background.

> 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 Episerver 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.



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

Commands

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

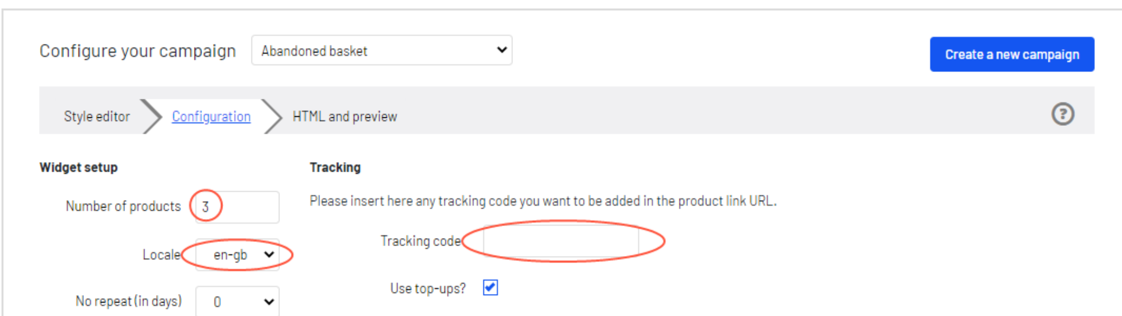
Configuring email recommendations strategies

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 Episerverfor 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.

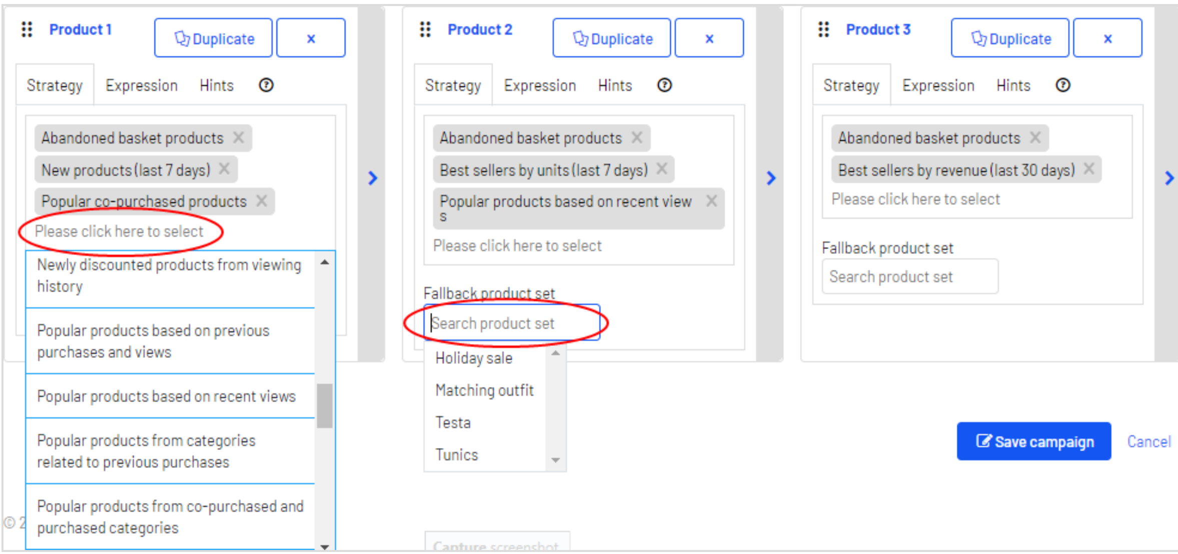
   

4. In **No repeat (in days)**, set the number of consecutive days that recommendations are not repeated in multiple emails for the same campaign. For example, if you sent a *Daily Deals* type of email and you want to ensure that the recommendations are different, you can select *No repeat in 3 days*.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

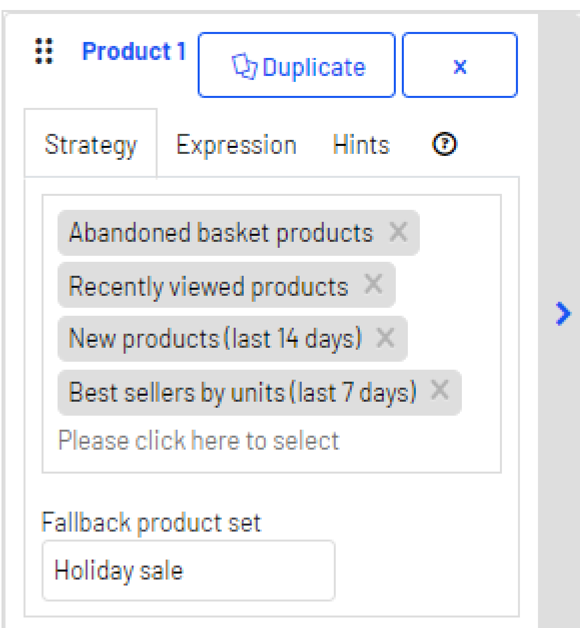
The visual editor displays the number of positions you chose to set up.

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, Episerver 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, Episerver 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 the Email Product Recommendations campaign, you can do either of the following actions:

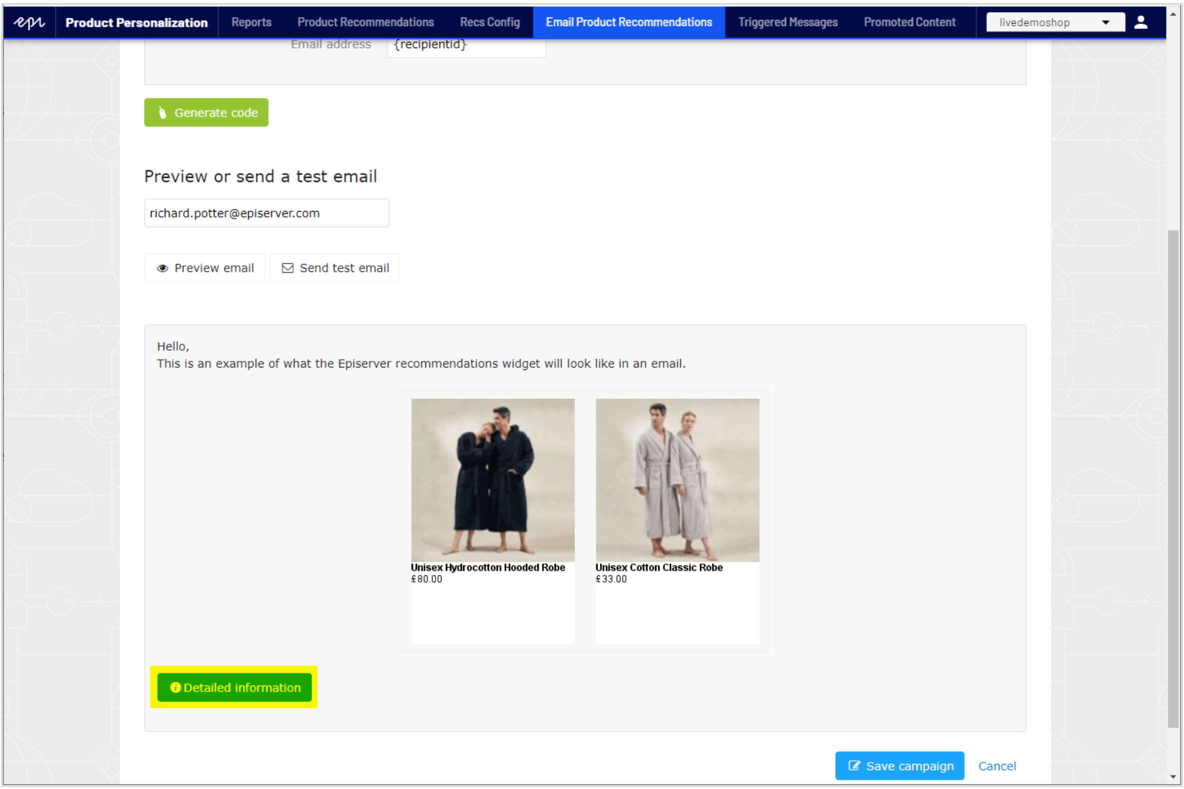
- **Fallback product set**. Select a product set from a list of preselected products that can appear in the recommendations if none of the strategies return a result.

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

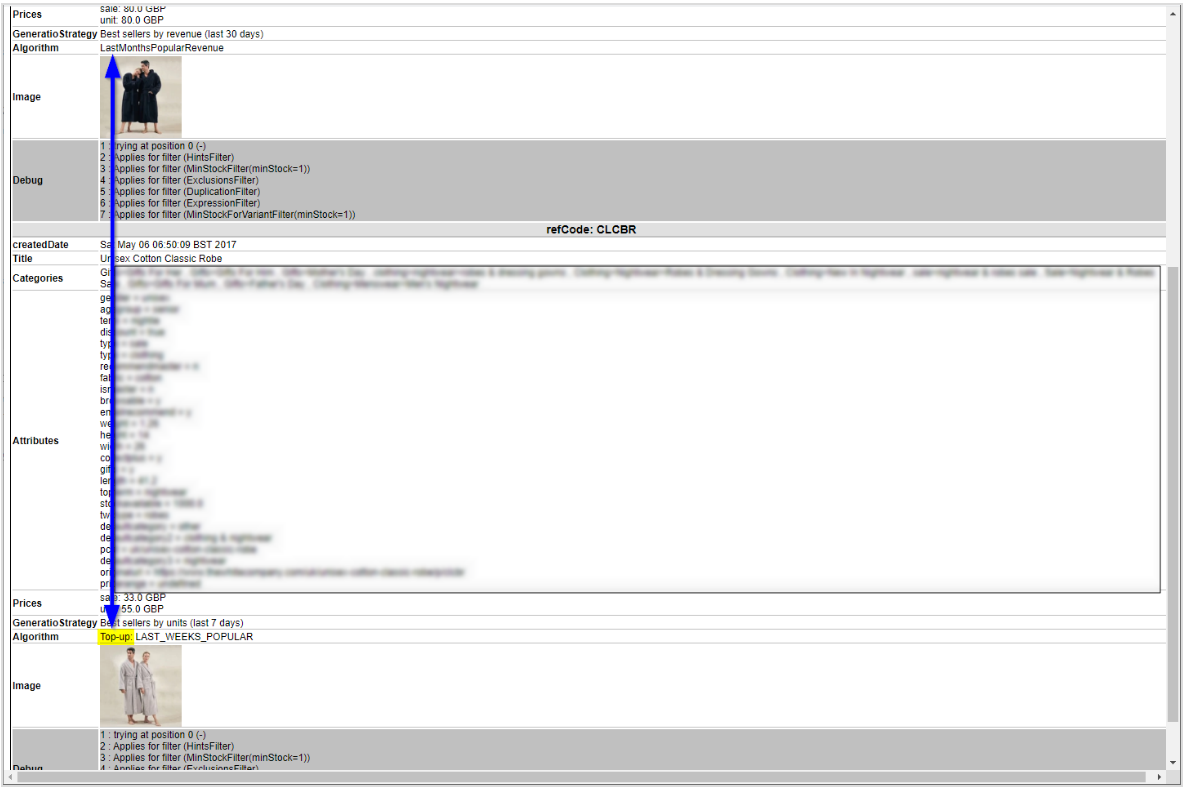
- **Use top-ups** check box. Ensures that the system displays a best seller from the last 7 days, if none of the strategies in the stack return a result.

  > 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.



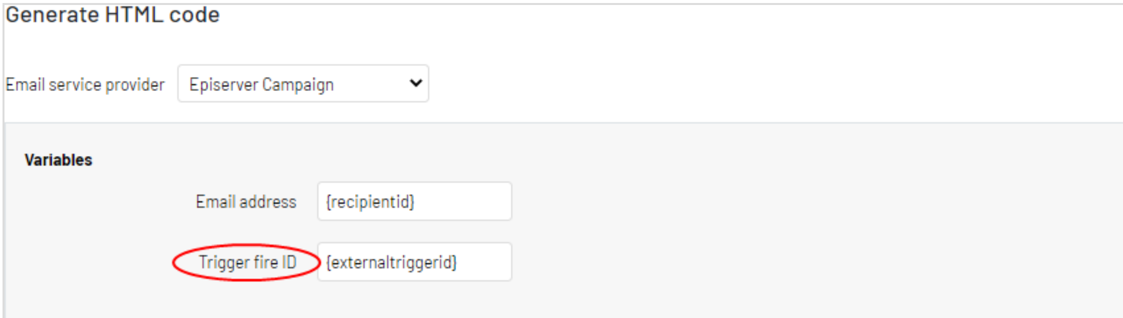
Previewing and generating the recommendations code

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

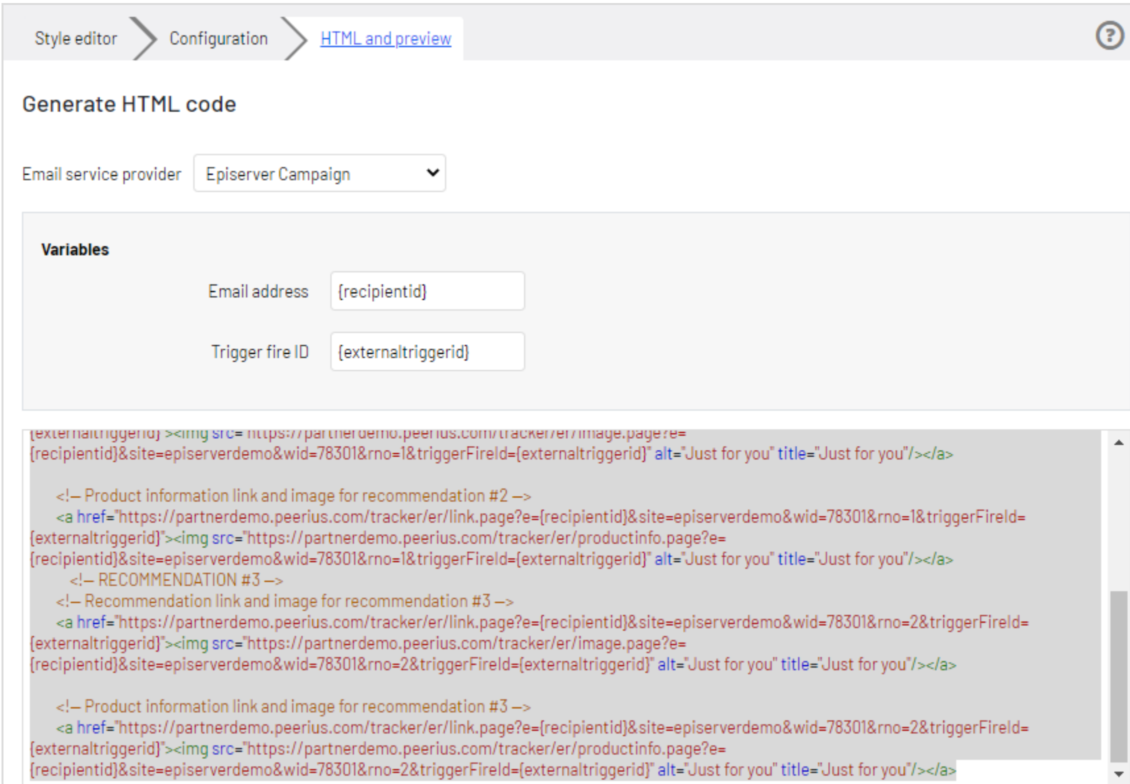
1. Select your ESP(email service provider) from the drop-down list to populate the fields for the **Variables**.

   If you do not see your ESP, you can manually insert your ESP email variable in the **Email address**s 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 Recommendationscampaign, a **Trigger fire ID** variable field will be present.)



Note: The **Email address** variable is required to let Episerver 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, Episerver 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.



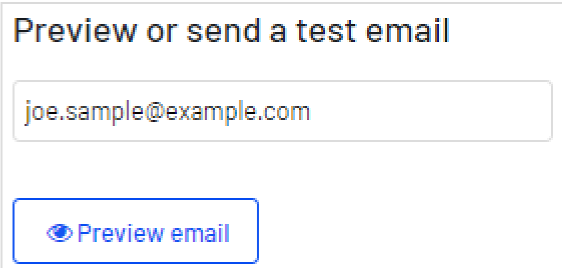
3. Copy and paste the HTML code into your email template to retrieve recommendations.

   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.

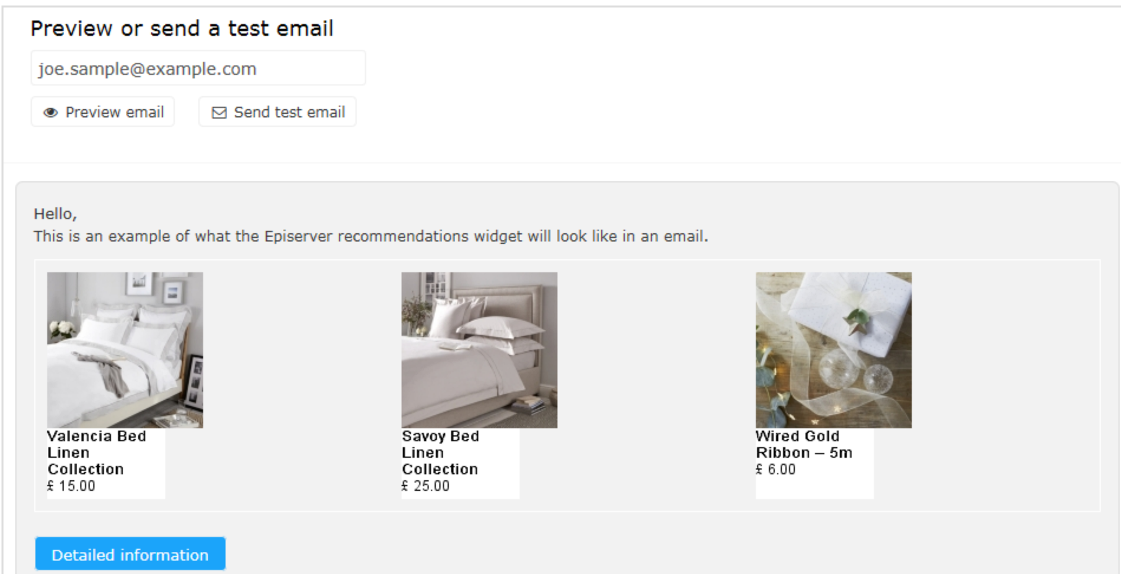
   The generated code does not include any other formatting. You can add HTML and CSS in your template to style the recommendations, such as adding them to a table or resizing the product images.

Previewing your campaign

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



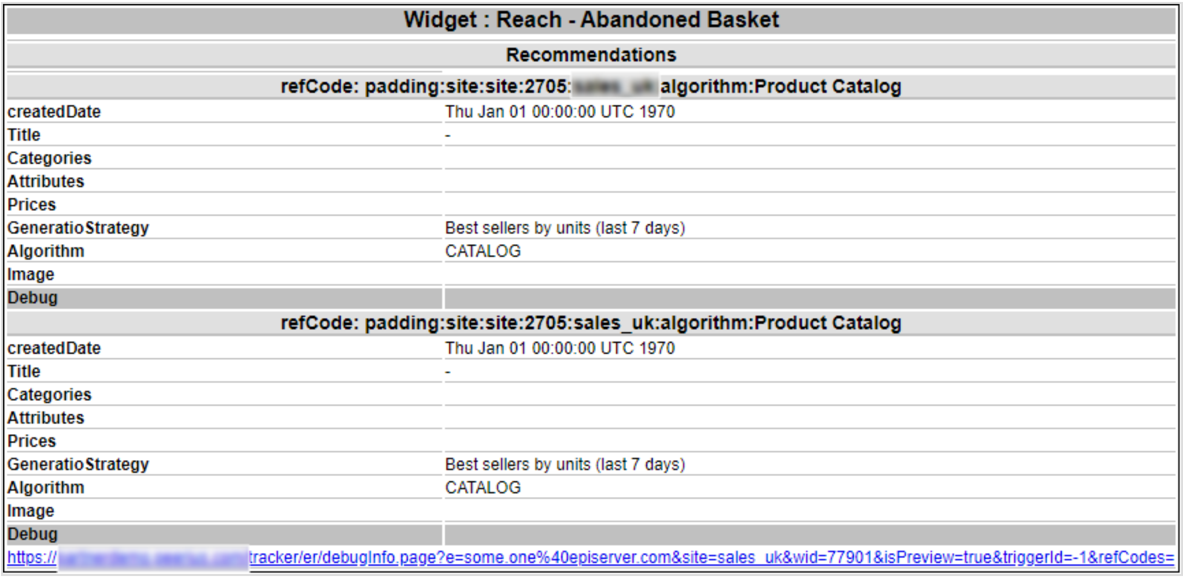
- Preview the email recommendations within the for the Personalization Portal (showing recommendations below the **Preview email** button).



- 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:[illegible] 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://[illegible]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.
Best sellers by units	Show best sellers based on number of products sold in the last 7 days.

Strategy	Description
(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 history	Show recently discounted products that the customer previously viewed.

Strategy	Description
Popular co-pur-chased 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-pur-chased and pur-chased 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 cus-tomer made a purchase.
Popular products from co-pur-chased 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 aban-doned-basket.
Products from in-session trigger cam-paigns	Used only with Triggers. Show products from in-session trigger campaigns, such as Abandoned basket, Abandoned browse, Abandoned checkout.
Recently pur-chased products	Show products the customer purchased, the most recent first.
Recently viewed products	Show products the customer recently viewed.
Recommendations based on aban-	Show related products based on the customer's abandoned basket items (biased towards the most recently abandoned product).

Strategy	Description
doned basket	
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.

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 Episerver), 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**

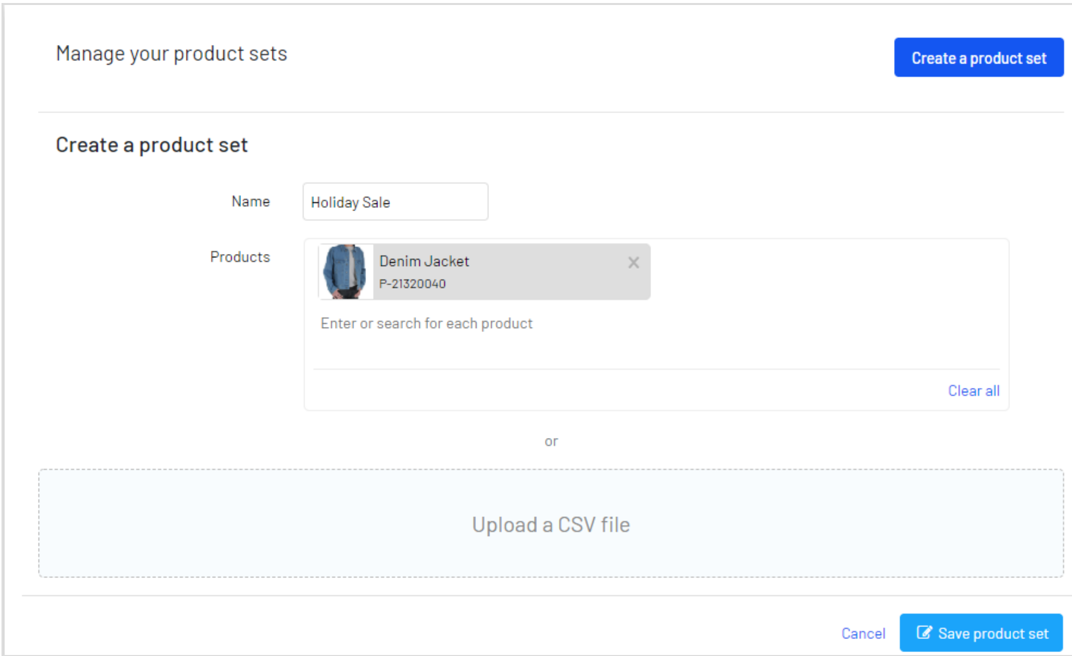
    - Cross-sells to the purchased items
    - Popular co-purchased products
    - Recommendations based on abandoned basket

- **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 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:

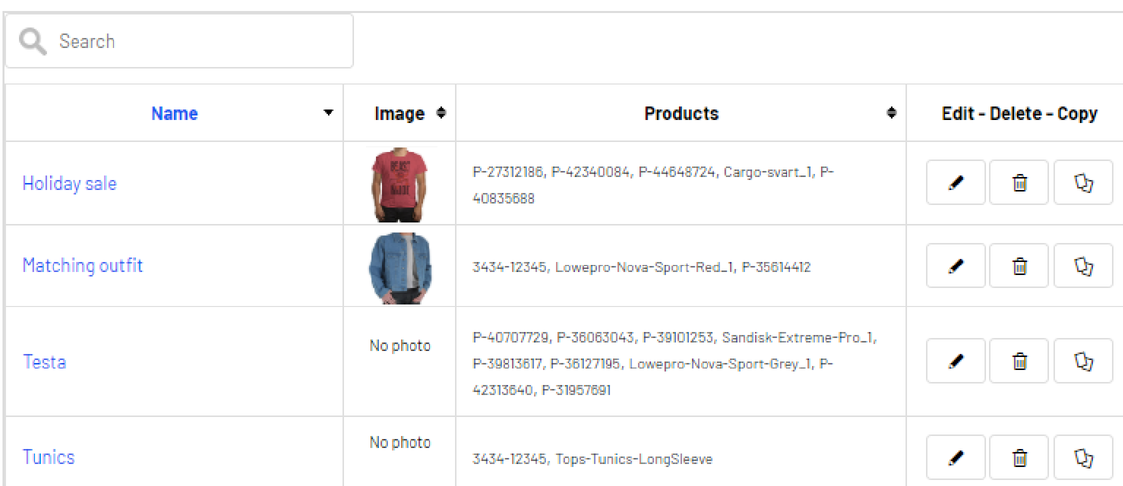
1. Select the **Product sets** tab.
2. Click **Create a product set**.
3. Enter a name for the product set, such as *Holiday Sale*.
4. Add products to a set in the following ways:
   - Enter the refCode, or the whole or partial name (such as *jacket*) of a product in the **Products** field. A list of 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.



- 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.



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

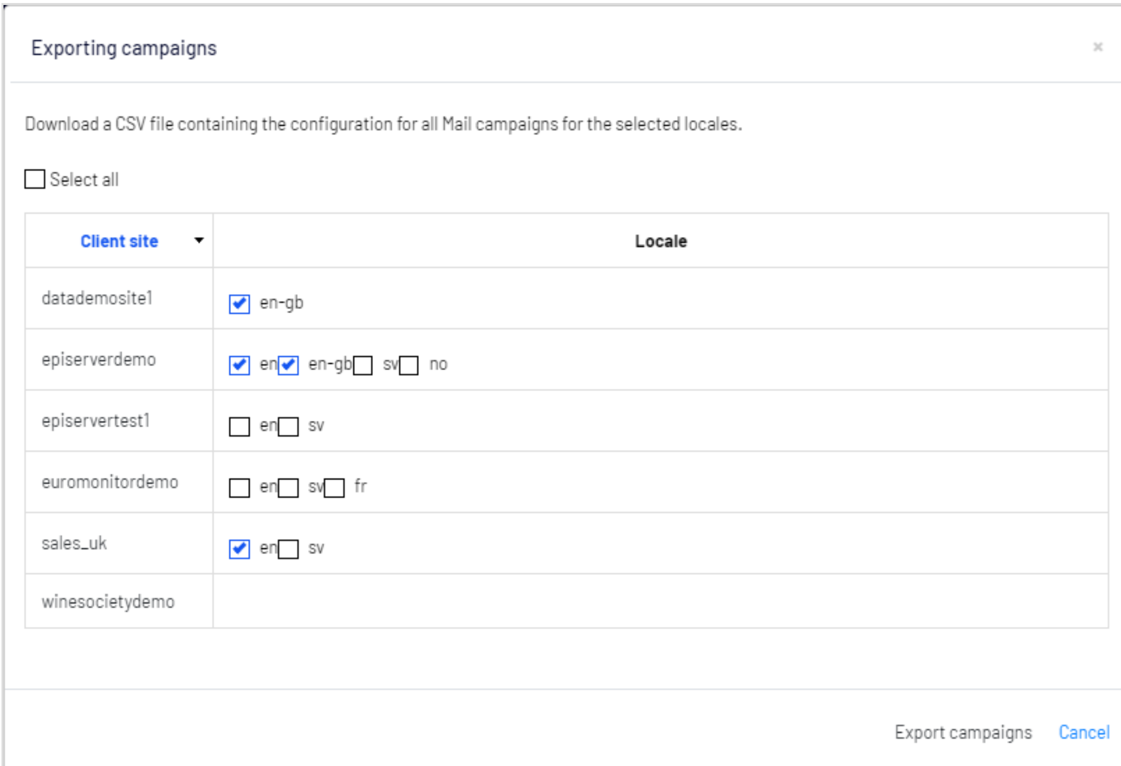
This topic describes how to export and import Email Product Recommendations campaigns with a CSV file.

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

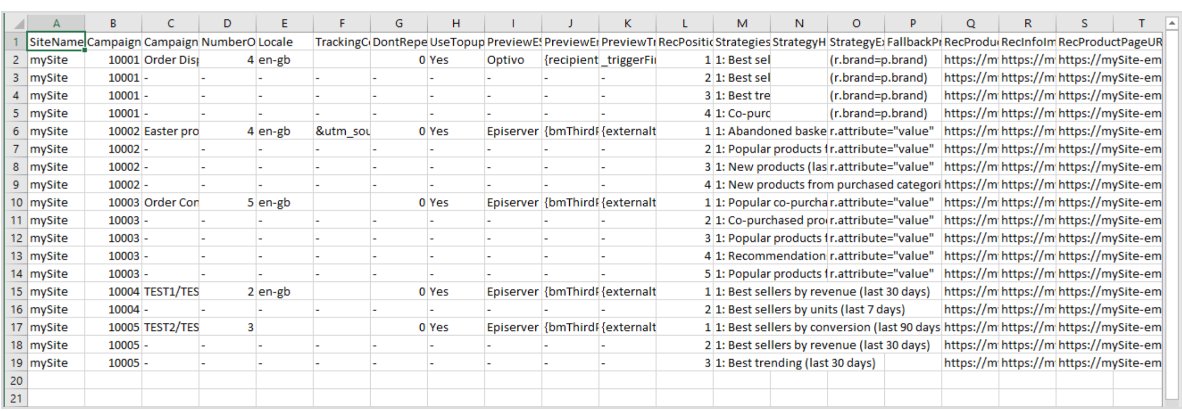
1. From the **Email Product Recommendations** > **Campaigns** view, click **Export campaigns**. The **Exporting campaigns** dialog box appears.



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.

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	PreviewT	RecPositic	Strategies	StrategyH	StrategyE	FallbackP	RecProdu	RecInfoIm	RecProductPageUR	
2	mySite	10001	Order Disp	4	en-gb		0	Yes	Optivo	{recipient	_triggerFi	1	1: Best sel		(r.brand=p.brand)		https://m	https://m	https://mySite-em	
3	mySite	10001	-	-	-	-	-	-	-	-	-	2	1: Best sel		(r.brand=p.brand)		https://m	https://m	https://mySite-em	
4	mySite	10001	-	-	-	-	-	-	-	-	-	3	1: Best tre		(r.brand=p.brand)		https://m	https://m	https://mySite-em	
5	mySite	10001	-	-	-	-	-	-	-	-	-	4	1: Co-purc		(r.brand=p.brand)		https://m	https://m	https://mySite-em	
6	mySite	10002	Easter pro	4	en-gb	&utm_sou	0	Yes	Episerver	{bmThirdF	{externalt	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 Con	5	en-gb		0	Yes	Episerver	{bmThirdF	{externalt	1	1: Popular co-purcha		r.attribute="value"		https://m	https://m	https://mySite-em	
11	mySite	10003	-	-	-	-	-	-	-	-	-	2	1: Co-purchased pro		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	{externalt	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	{externalt	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

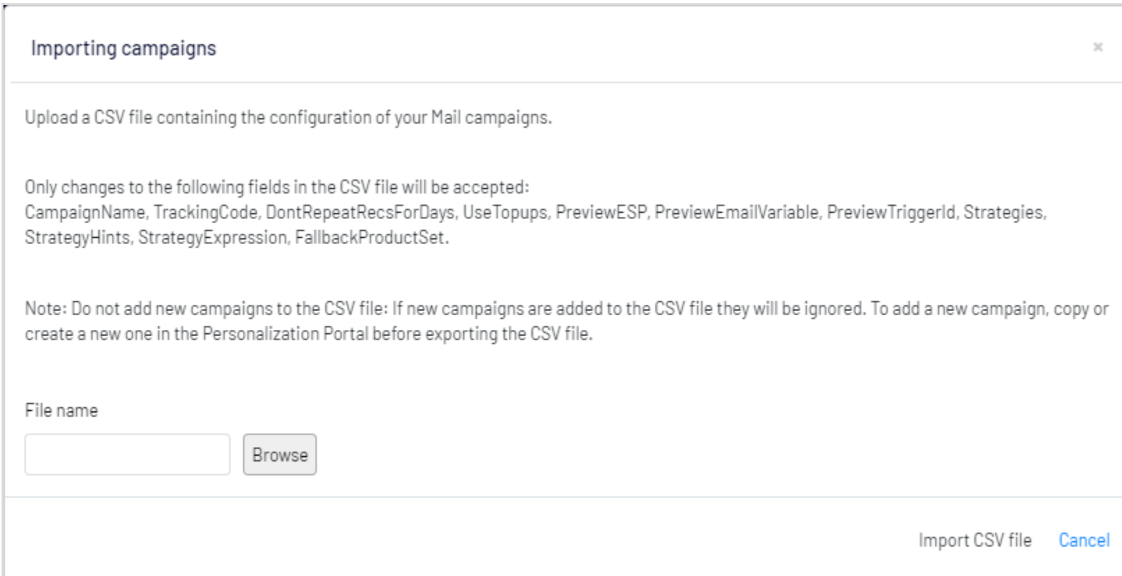
> Note: Do not add new campaigns to the CSV file. If you add new campaigns to the CSV file, you will receive an error message and the CSV file will not be imported. To add a new campaign, copy or create a new one in the Personalization Portal before exporting the CSV file.

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.



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

Triggered Messages

> Note: The Episerver Customer-Centric 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 Episerver 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 Episerver 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 Episerver 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 Episerver for the Personalization Portal so that Episerver 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. Episerver 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

Daily triggers are scheduled for analysis each day at a specific time.

Daily triggers	Description
Targeted discounts	Fires when a product the visitor has viewed but not purchased in the past 30 days has decreased in price. 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.
High product interest	Fires when a visitor has visited the same product multiple times without purchasing it in the last 30 days. 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 01:00 UK time. Can be combined with an Email Product Recommendations campaign to show the viewed products in the email sent.
Post-purchase	Fires a specified number of days after an order is placed. Can be

Daily triggers	Description
	combined with an Email Product Recommendations campaign to show the purchased products in the email sent. Analysis runs at 01:00 UK time.
Low-in-stock abandoned-basket	Fires when a product the visitor added to their basket in the last 14 days, but not purchased, is low in stock. The basket is considered abandoned after 4 hours of inactivity. Upper and lower thresholds of stock availability need to be specified. Analysis runs as soon as the product feed is imported. Can be combined with an Email Product Recommendations campaign to show the relevant 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 *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 for 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.

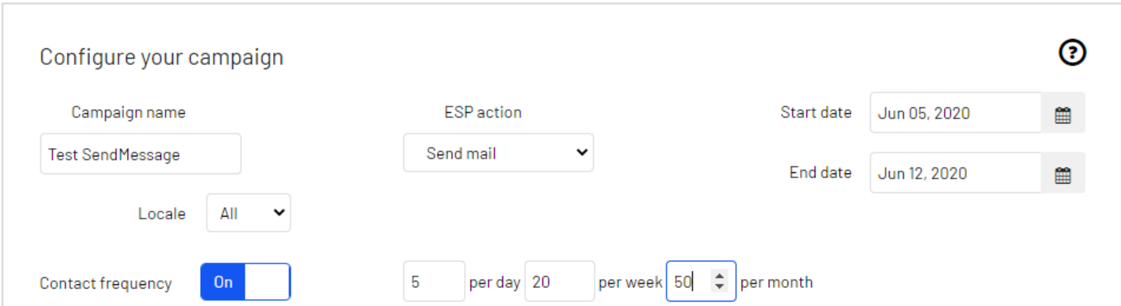
Creating a new Triggered Messages campaign

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:

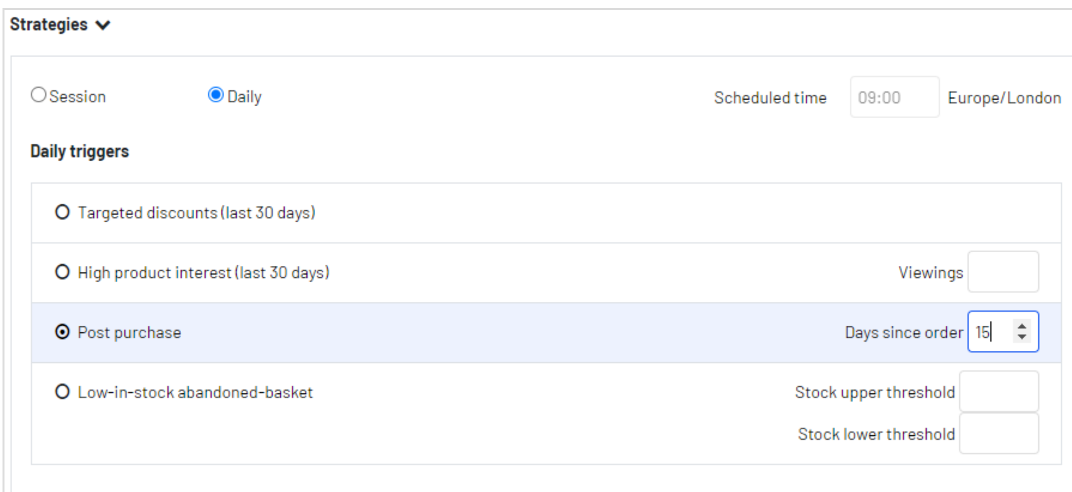
1. Enter a name for your Triggered Messages campaign, such as *Test SendMessage*.
2. Select an **ESP action** so that the trigger performs the desired action when it fires.
3. Optionally, specify start and end dates for the campaign.
4. If you have a site in Episerver with more than one language, such 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).



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 says that the visitor must have made a purchase 15 days ago.

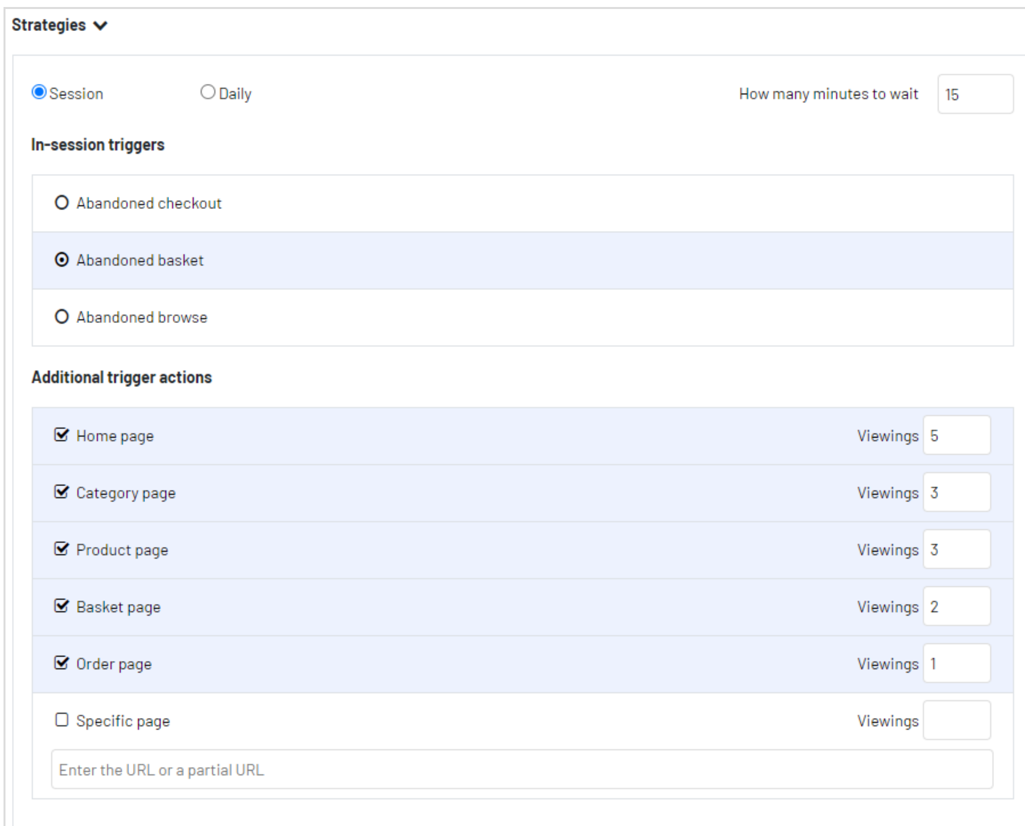


   - You can use **Additional trigger actions** alone or in combination with an **In-session trigger**. See Trigger action limits.
      - You can specify whether the customer must have visited a certain page type a specified number of times.

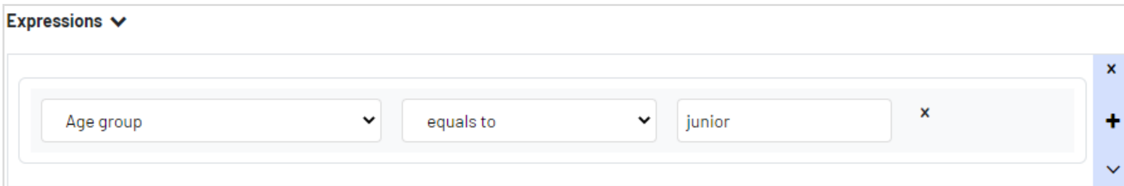
- You can specify a URL (or a keyword from a URL) from your site that the customer must have visited.

> **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).



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 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.

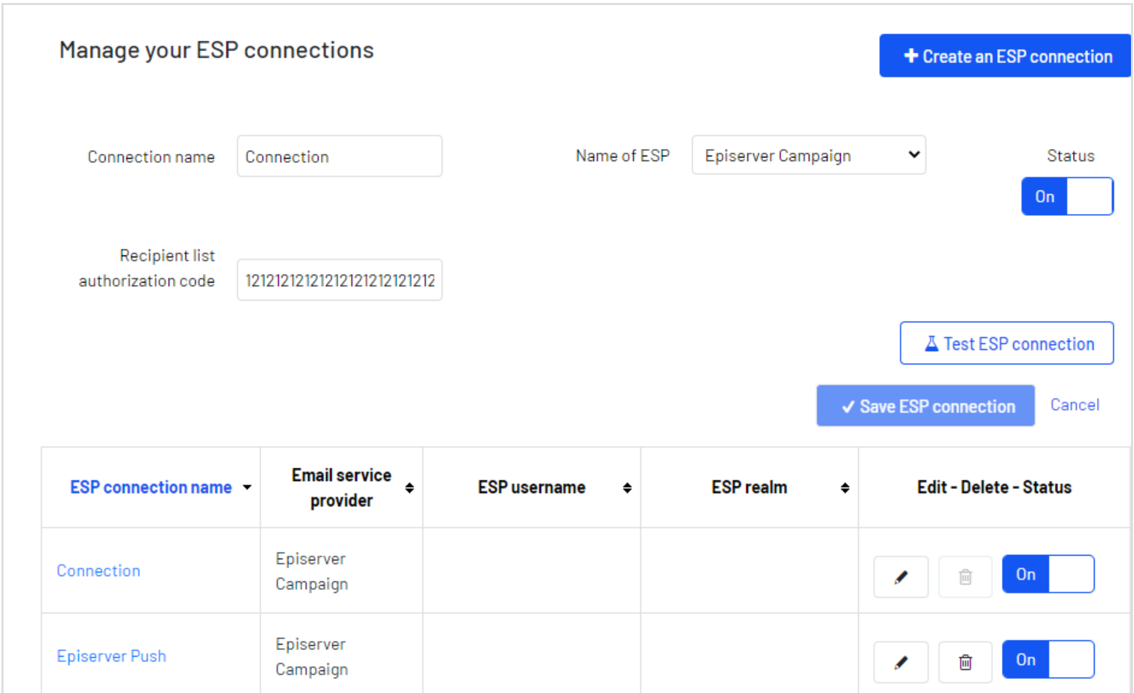
> Tip: You may have products whose prices change very frequently. To avoid sending a discount email every time a price reduction occurs for these products, you can use **Expressions** to limit the trigger requirements to selected products.

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

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

1. To set up the connection, 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.



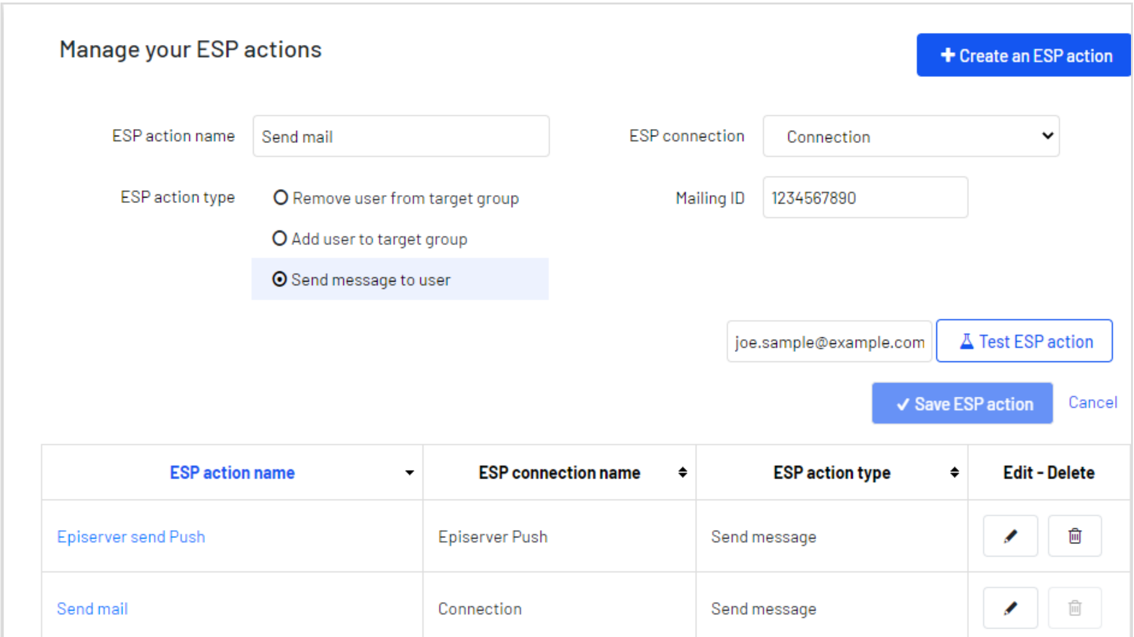
4. To create a connection:
   a. Enter your API credentials for your ESP account (such as username, password, database, realm, API token).
   b. Click **Test ESP connection** to test the connection.
   c. Click **Save ESP connection**.

Setting up an ESP action

1. To set up the action, 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**.



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

Episerver 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 Episerver World.

Managing Triggered Messages campaigns

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

This page allows you to 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.

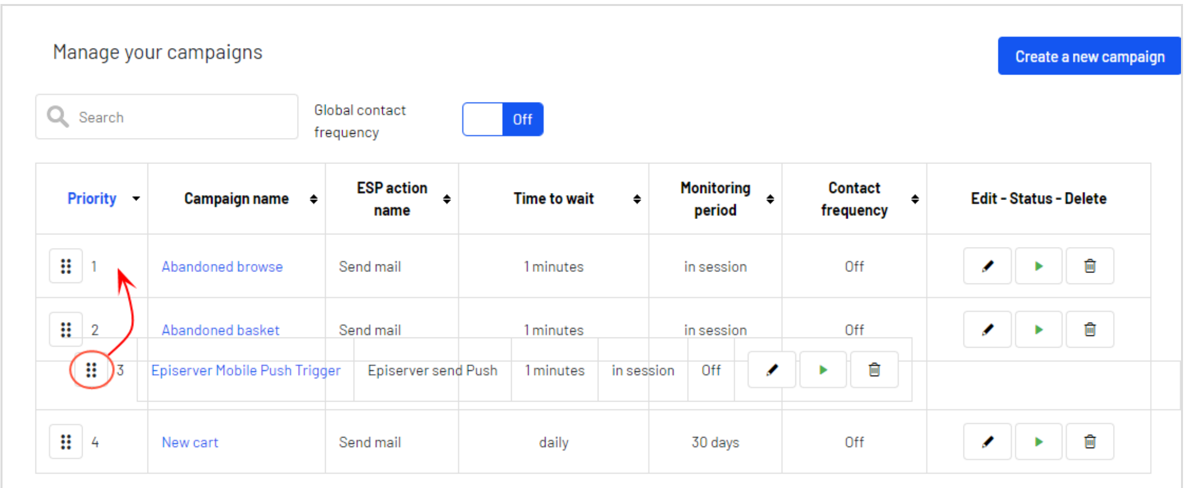
The priority order is especially important if you restrict the number of times a trigger can fire for any one customer (by defining a global contact frequency).

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.

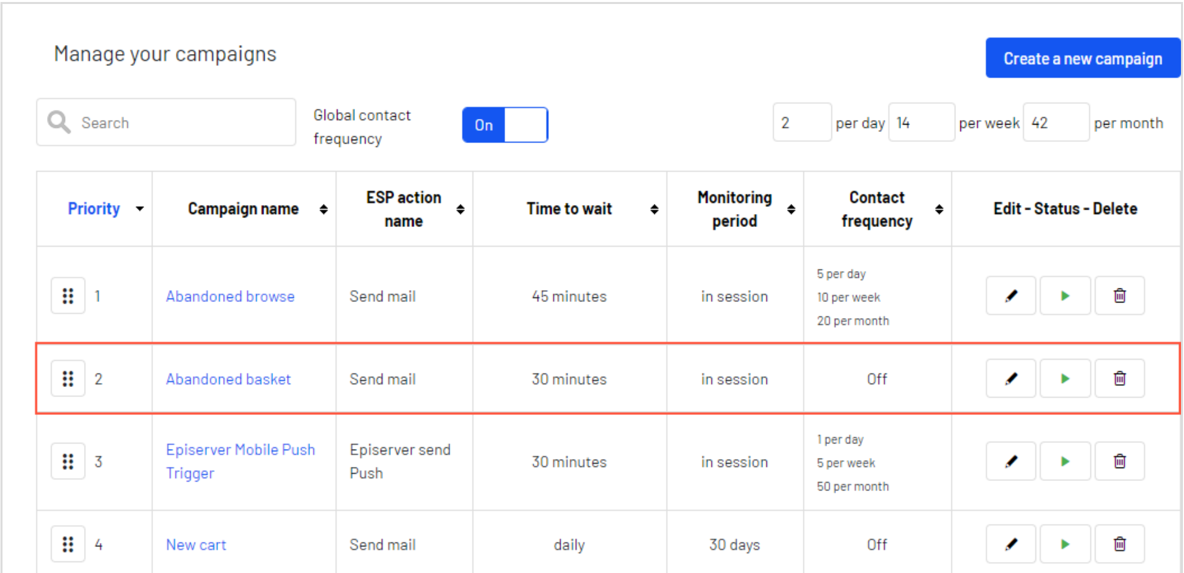
To re-order the priority of your trigger campaigns click the button ⠿ to the left of a campaign's name in the **Priority** column, and drag the campaign to the desired position in the table.



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 **Episerver 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.



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 .

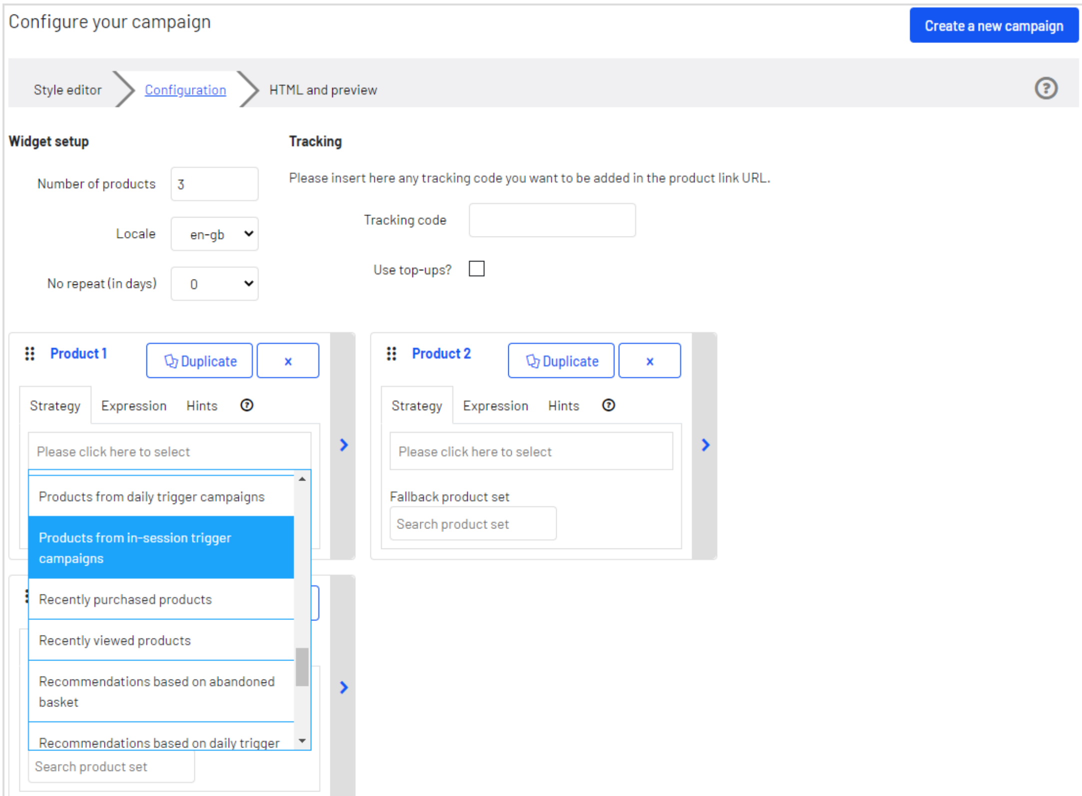
You can create a campaign in Email Content Recommendations to... For information about creating an Email Content Recommendations campaign, see .

Setting up a triggered Email Product Recommendations campaign

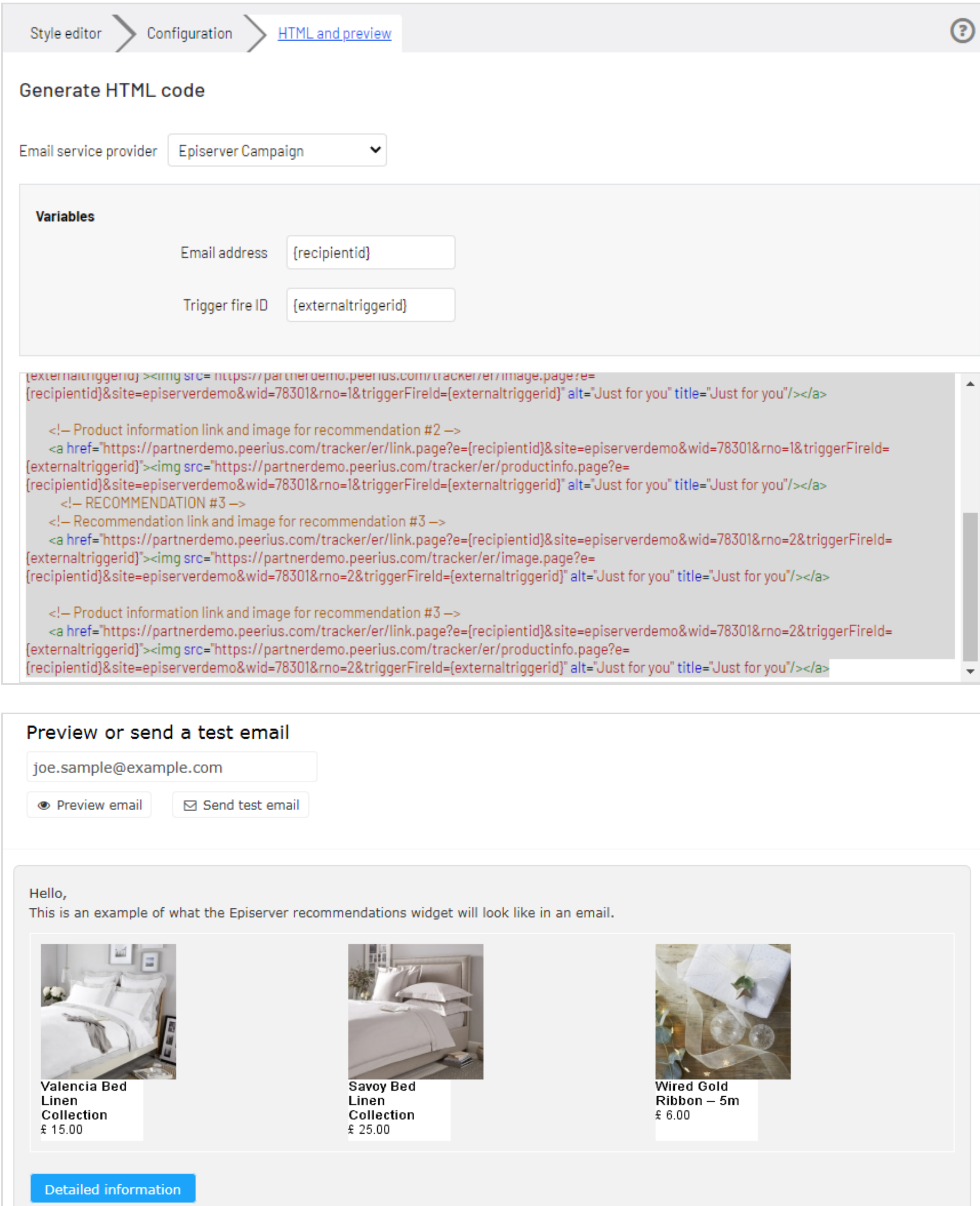
In the Episerver for the Personalization Portal, select **Email Product Recommendations**, click Create a new campaign, and follow the steps.

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.



3. **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}
{recipientid}&site=episerverdemo&wid=78301&rno=1&triggerFireId={externaltriggerid}" alt="Just for you" title="Just for you"/>
<!-- Product information link and image for recommendation #2 -->

<!-- RECOMMENDATION #3 -->
<!-- Recommendation link and image for recommendation #3 -->

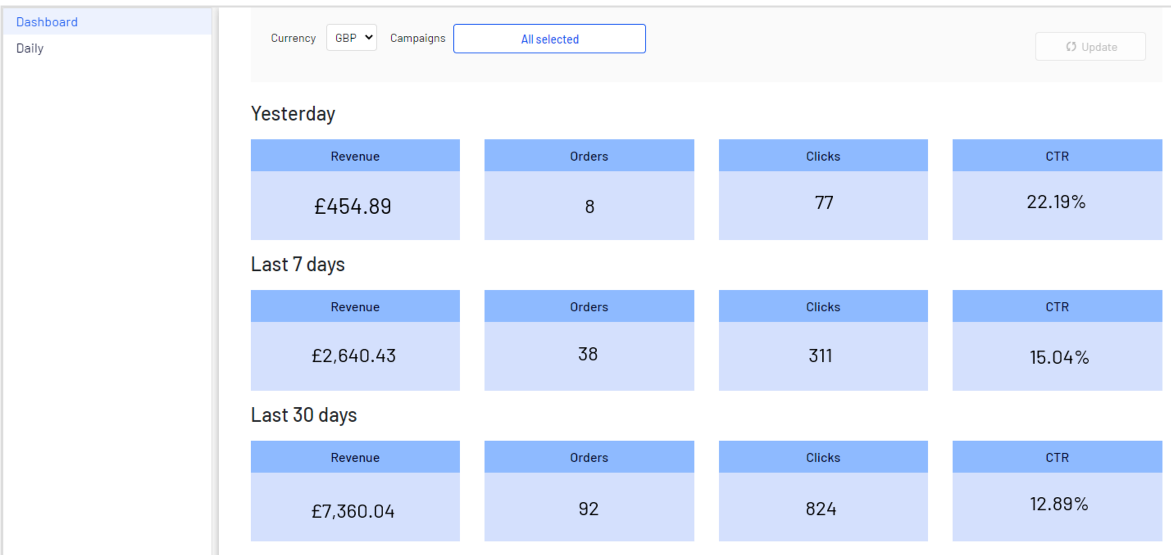
<!-- Product information link and image for recommendation #3 -->

Preview or send a test email
joe.sample@example.com
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

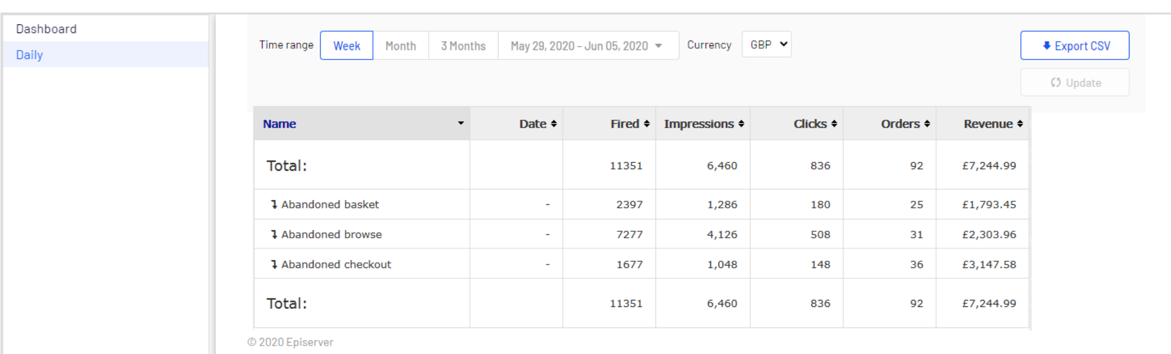
Setting up a triggered Email Content Recommendations campaign

Triggered messages reports in Episerver

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 Episerver-generated link from those emails. This is reported for each trigger and broken down to daily reporting.



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

Using Triggered Messages with Episerver Campaign

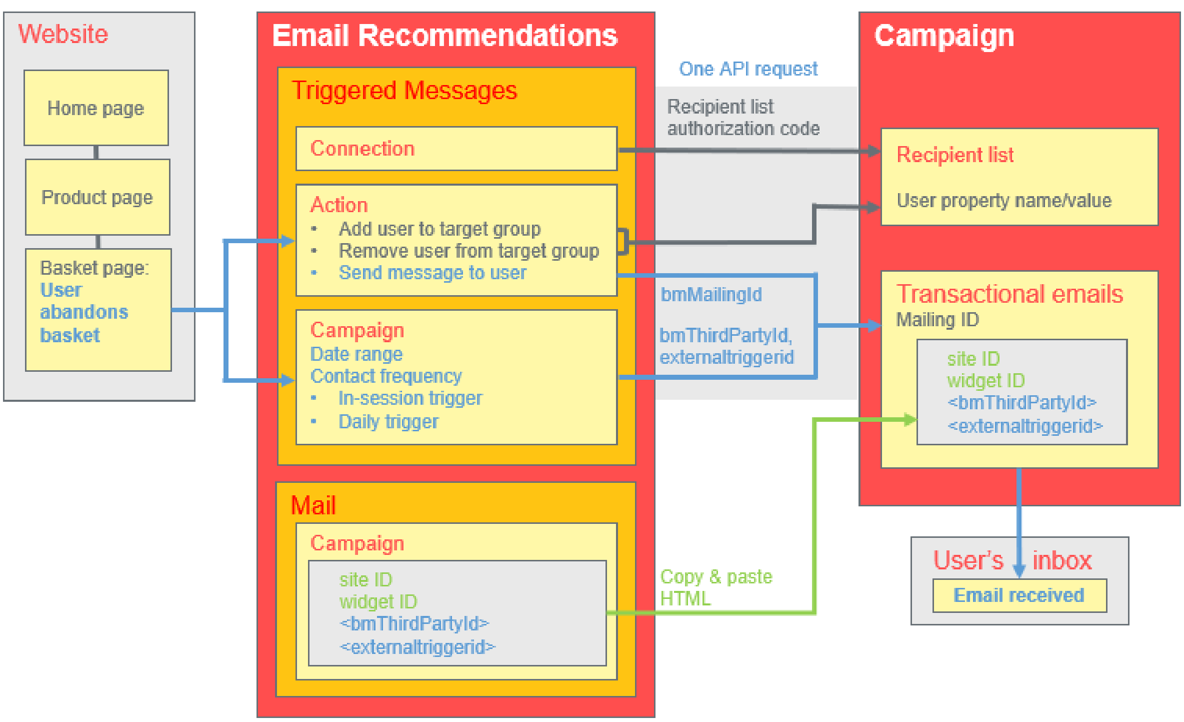
This topic describes how to connect Triggered Messages to Episerver Campaign.

> **Note:** To use Triggered Messages with Episerver Campaign, your system administrator or developer must configure tracking first as described in the technical documentation on Episerver 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 Episerver 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 Episerver Campaign and specify the appropriate action to take.

The following image shows the flow, through Triggered Messages and Episerver 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.

- **Episerver for the Personalization Portal** > **Triggers**, set up the following:
  - **ESP connection** to connect to the Episerver 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 Episerver 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 **Episerver 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 Episerver Campaign's APIs and libraries.
    >
    > Please note the legal requirements in the Opt-in topic in the Episerver Campaign user guide regarding the advertising consent of the recipients.
  - A **Transactional mail campaign**.
  - Set up an associated transactional mail campaign in Episerver Campaign by copying the generated HTML code from Email Product Recommendations and pasting it into the email template (with that **Mailing ID**) on the Episerver Campaign portal. The HTML code contains placeholders that the ESP (that is, Episerver Campaign) replaces with the actual values for each email sent.

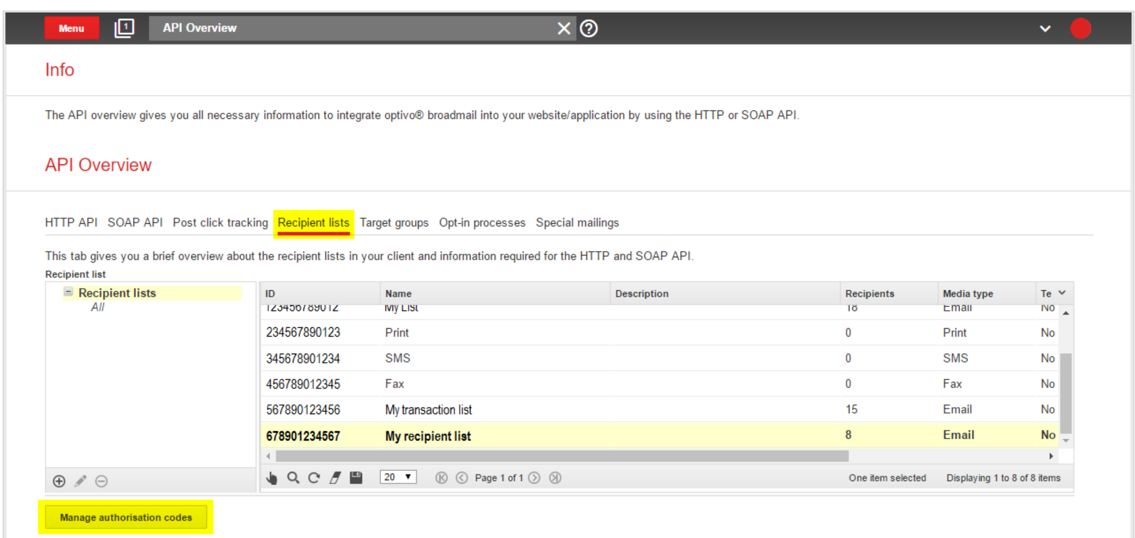
When an Episerver trigger fires, using the Episerver Campaign HTTP API, Triggered Messages sends Episerver Campaign the following for a **Send Message** action:

- **Recipient list authorization code**. A Recipient list authorization code creates a connection between Episerver 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**, Episerver 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.

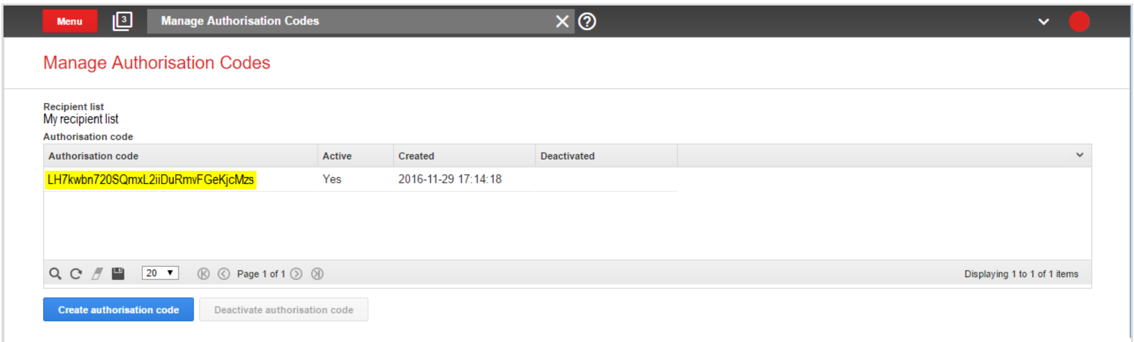
Retrieving the Recipient list authorization code

To retrieve the Recipient list authorization code:

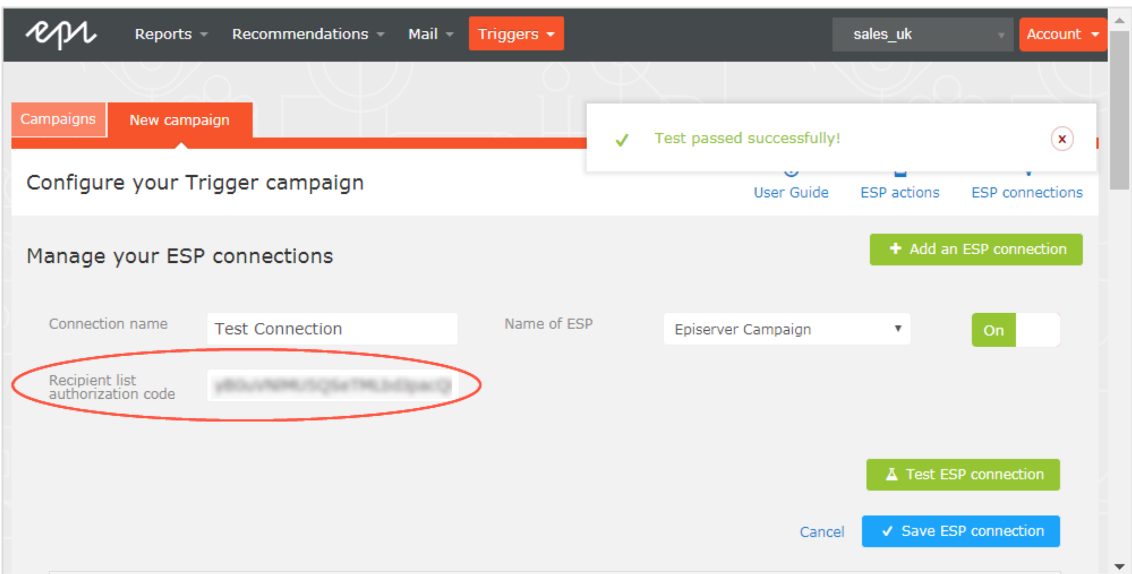
1. Open the start menu and select **Administration** > **API overview** in Episerver Campaign.
2. Select **Recipient lists** to show its table.
3. Select your recipient list from the table.
4. Click **Manage authorization codes**.



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



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



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

Linking to a specific basket

Episerver 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 Episerver World.

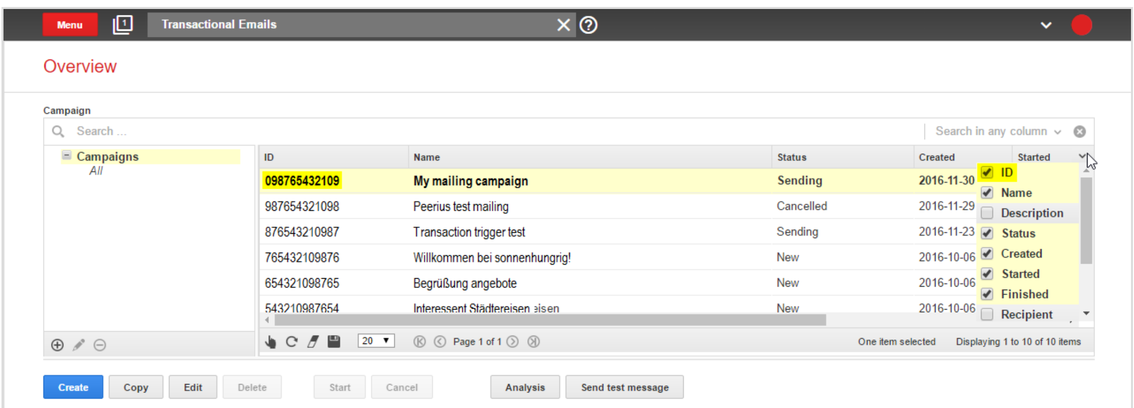
Creating an ESP action

See also Setting up an ESP action.

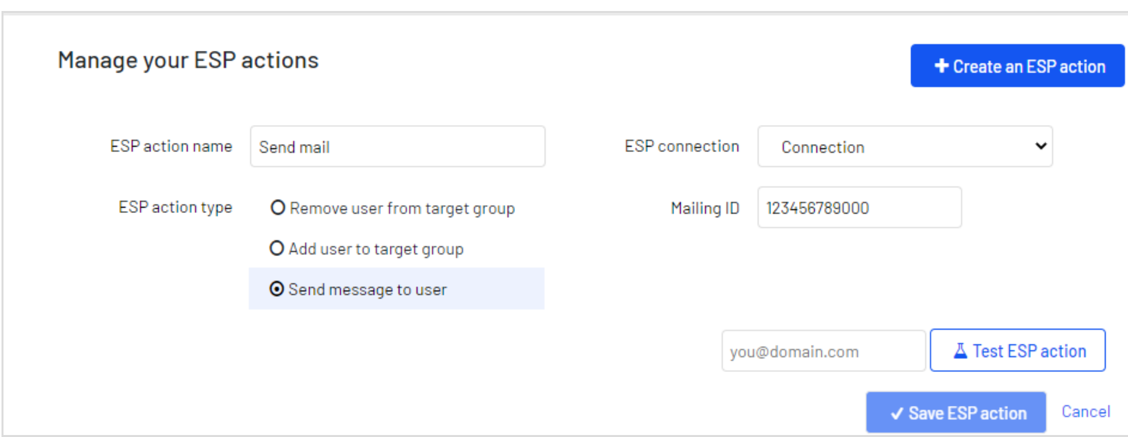
Creating a Send message to user action

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

1. Open the start menu and select **Campaigns** > **Transactionalmails** in Episerver 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**.

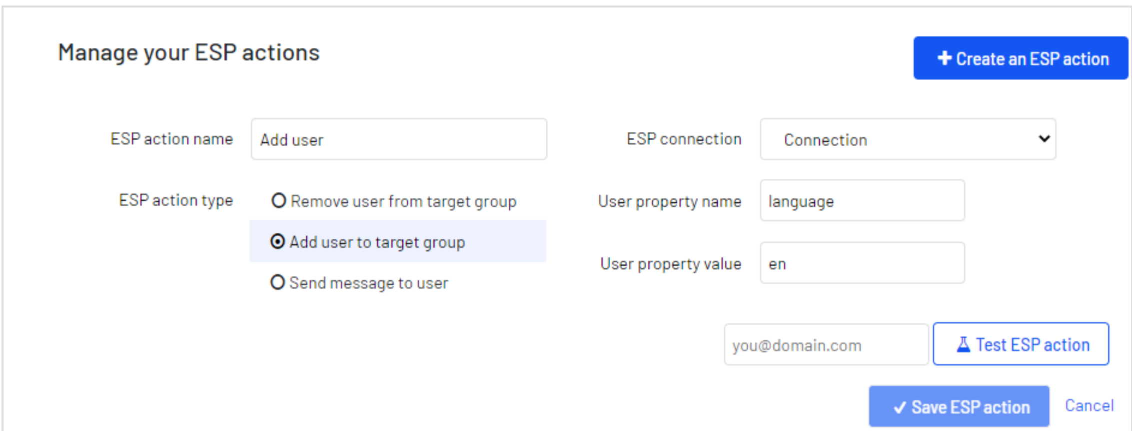


a. **ESP action name**. Enter the action name.
b. **ESP connection**. Select the connection that you created earlier.
c. **ESP action type**. Select **Send message to user**.
d. **Mailing ID**. Enter the campaign Mailing ID.
e. **Test ESP action**. Enter the email address of the email recipient and click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



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), Episerver Campaign performs an additional check on the user inform-

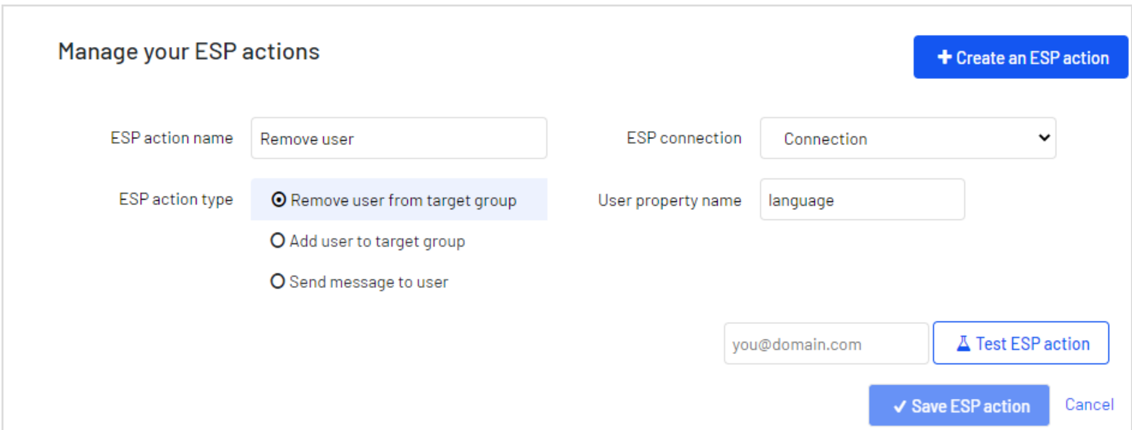
ation to use the correct currency.

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.



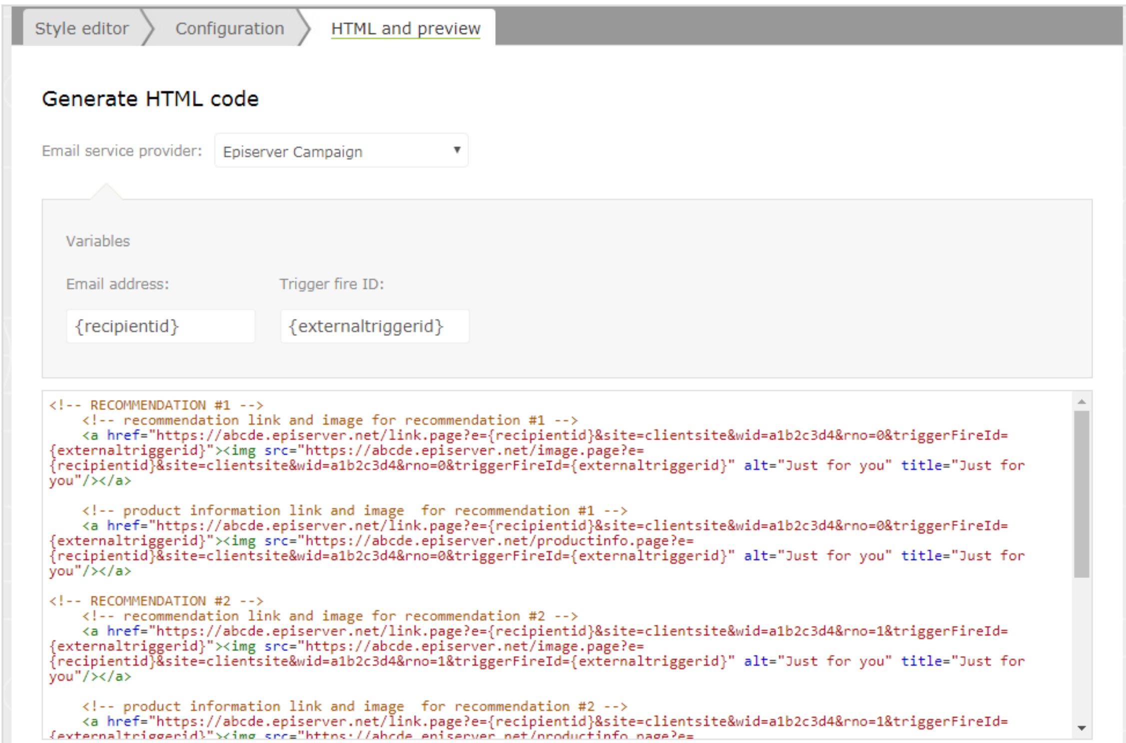
   a. **ESP action name**. Enter the action name.
   b. **ESP action type**. Select **Remove user from target group**.
   c. **ESP connection**. Select the connection that you created earlier.
   d. **User property name**. The name of the user property in your recipient list that you want Triggered Messages 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 Episerver

The following procedure shows how to generate HTML code to copy from Episerver Email Product Recommendations into a mailing in the Episerver 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 **Episerver Campaign** as the **Email service provider**.

6. Click **Generate code**.
7. Copy the HTML code displayed in the window.



8. Go to Episerver Campaign.

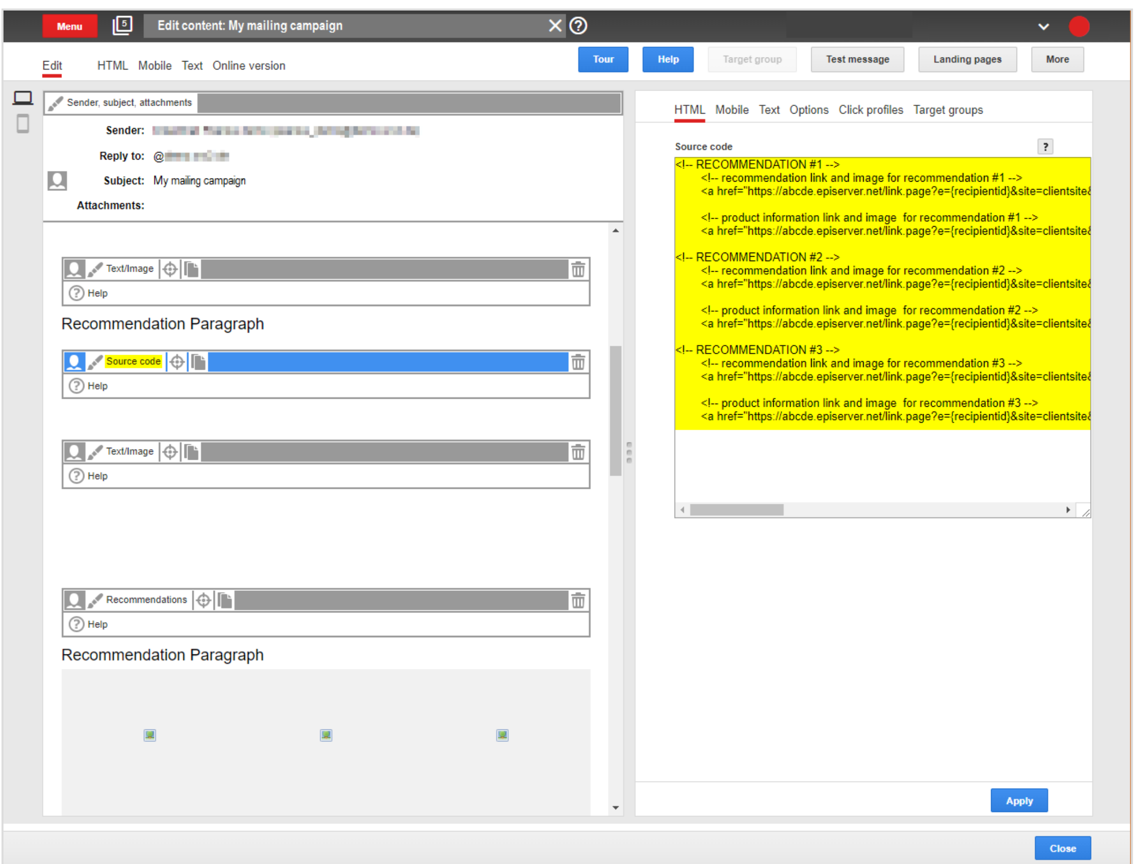
> Note: To create a new mailing in Episerver Campaign, go to **Campaigns** > **Transactional mails** and following the instructions in Transactional mails in the Episerver User Guide.

9. Open the start menu and select **Campaigns** > **Transactional emails**.
10. Select your email campaign.
11. Click **Edit**.
12. In the **Edit transactional mail** window that opens, click the email node and click **Edit** .
13. Click **Edit content**.
14. In the editor, add or find the **Source Code** paragraph where you want to insert the Episerver 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.episerver.net/link.page?
e={bmThirdParty}&site=clientsite&wid=12345&rno="0">
<img src="https://abcde.episerver.net/image.page?
widthIfEmpty=100&heightIfEmpty=200&
e={bmThirdPartyID}&site=clientsite&wid=12345&rno=0"
alt="Just for you" title="Just for you" /></a>
<a href="https://abcde.episerver.net/link.page?
e={bmThirdParty}&site=clientsite&wid=12345&rno="0">
<img src="https://abcde.episerver.net/productinfo.page?
widthIfEmpty=100&heightIfEmpty=200&
e={bmThirdPartyID}&site=clientsite&wid=12345&rno=0"
alt="Just for you" title="Just for you" /></a>
```



17. Click **Apply**.

Visitor Intelligence

> Note: The Episerver Customer-Centric 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 Episerver World for technical information.

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

You can access Visitor Intelligence via the product switcher. If you use Episerver Campaign, you can access Visitor Intelligence under start menu > **Analytics**.

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

- Viewing profiles. Displays 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 match the criteria that you have set up for the segment.
  - You can use segments as criteria when you create visitor groups in Episerver CMS.

Viewing profiles

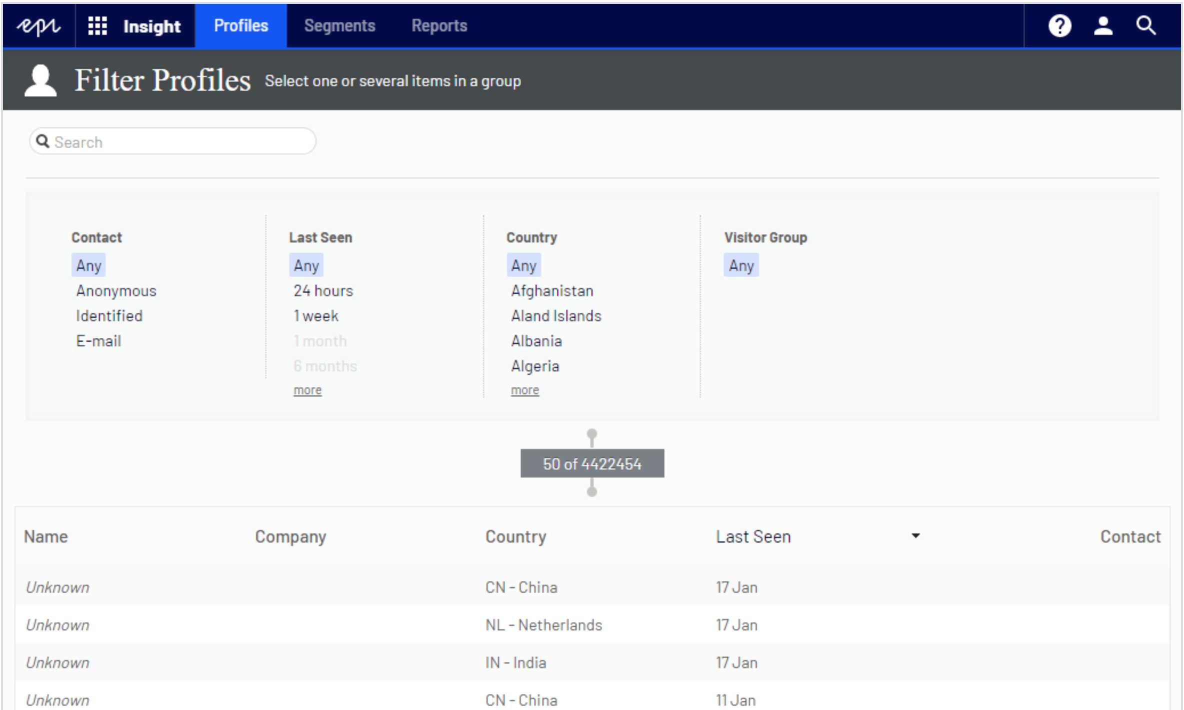
The **Profiles** view displays information about visitors and their activity on your site. You can do the following in **Profiles** view.

- Filter the **Profiles** view by selection options in the **Contact**, **Last Seen**, and **Country** 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 spans. 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 a developer has tracked by updating your solutions' tracking events. For example, if you want to create a group of users who have visited *Contact Us* in a specific geographic region, create a visitor group with the criteria, track the visitor groups, and create a segment of users in that visitor group.

    > Note: The visitor group tracking method is part of *EPiServer.Tracking.Cms* from version 1.9.0. See Visitor group tracking on Episerver World for developer information about visitor group tracking.
- 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. See Viewing profile details.



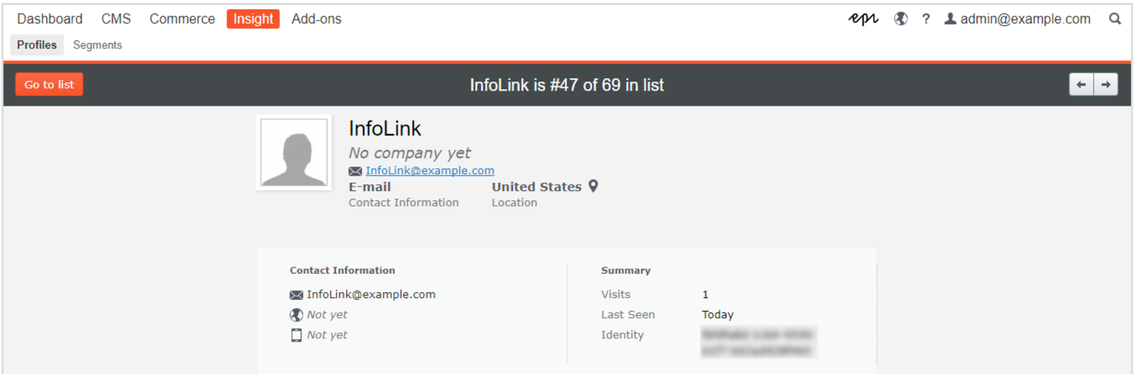
Viewing profile details

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

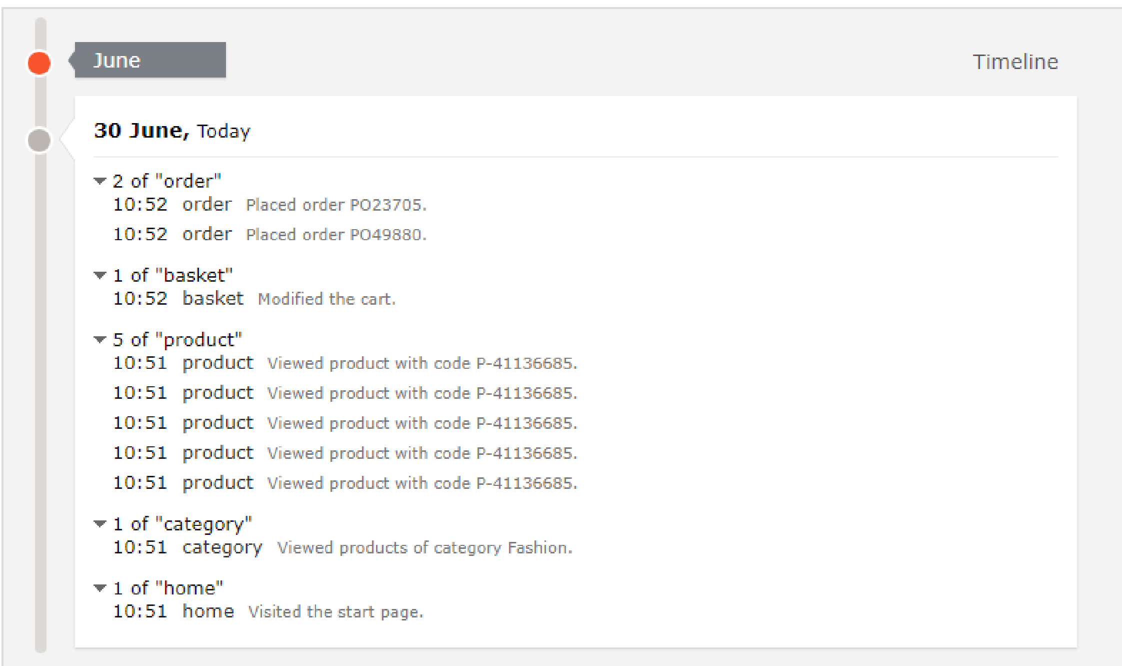
> Note: Cookies track a visitor's behavior. If a visitor deletes cookies between visits, or visits a website from more than one device (such as a mobile phone and a computer), then the visitor may be connected to more than one profile.

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 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 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.

The timeline tracks the number of the following activities:

> **Tip:** Select the URL if you want to view the page that tracked the activity.

- **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

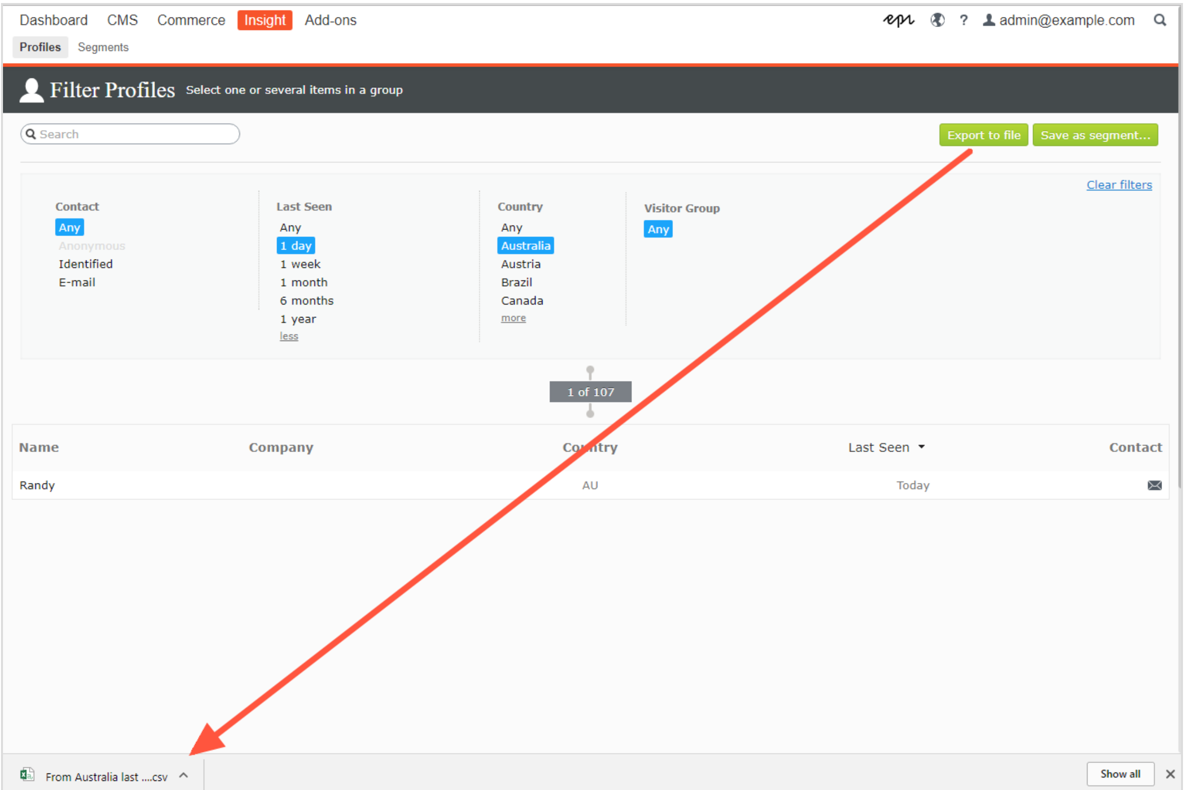
One user can have several profiles when the user visits the site using different browsers or several devices. The Profile Store detects and merges profiles that correspond to one person based on the user's email address.

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, 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.

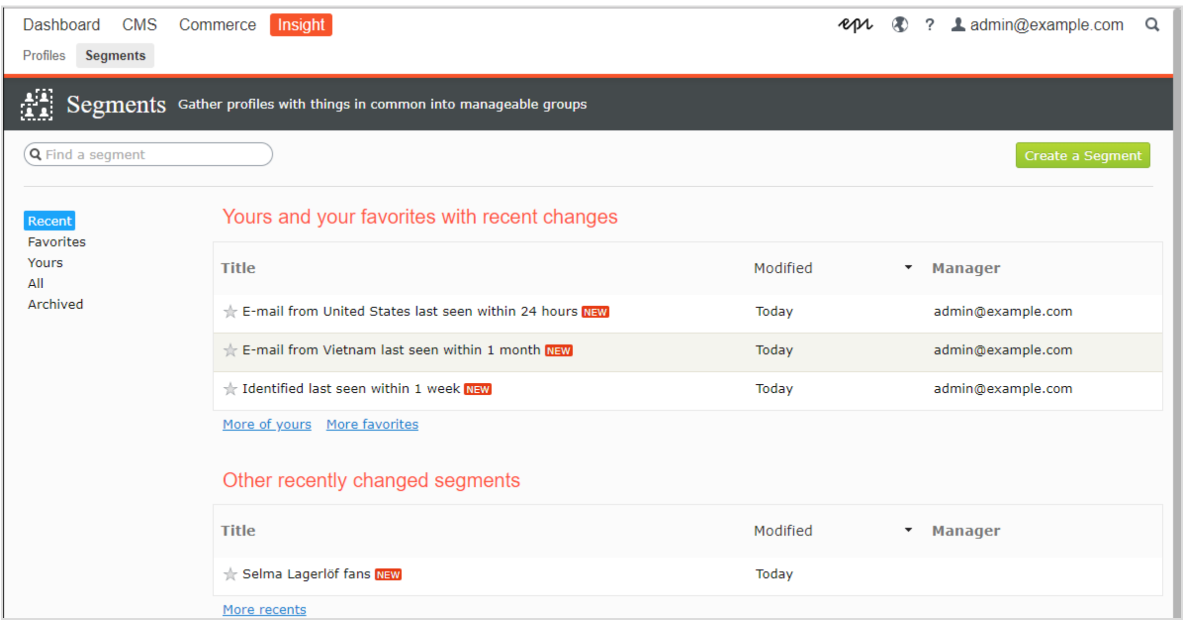
- **E-mail**. Email that user registered with.
- **Name**. Full name from register information (such as *Jane Doe* or *Hans Strueber*).
- **Last Seen**. The number of days that user last logged in the website (such as *Stanley & Co.* or *Barrett Ltd.*).
- **Country**. Two-letter country code (such as *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 only returning visitors; see personalizing content and using visitor groups in the Episerver 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.

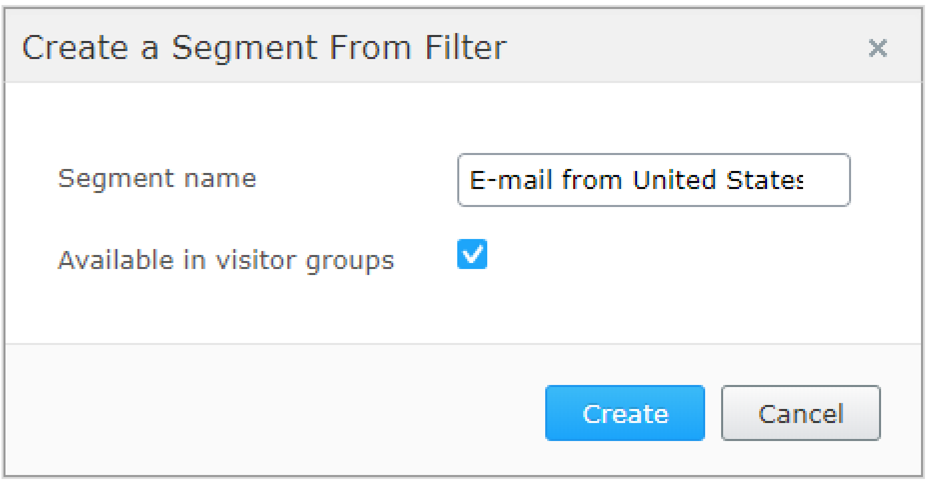


Creating a segment by filtering visitor profile data

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**, and **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 on visitor activity and historical data, and profile data also.

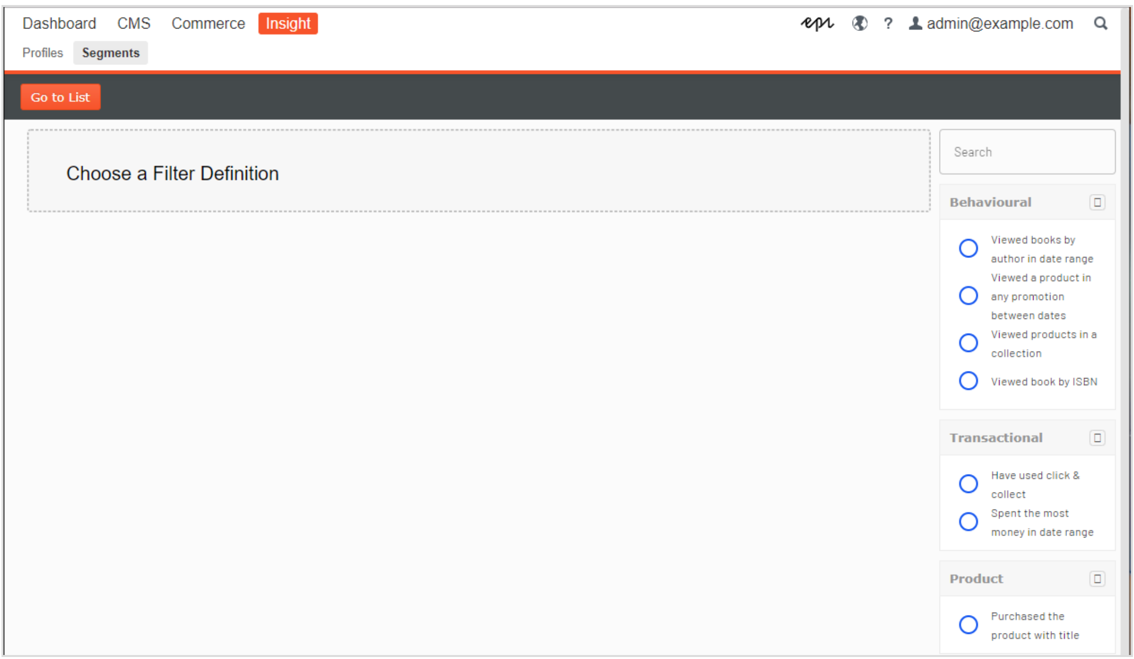
You can create a segment based on visitor activity and historical data. For example:

- Visitors who have bought specific product during period
- Users who have ever opened any campaign email
- Visitors with abandoned carts today

> Note: Developers create filter definition templates to query and

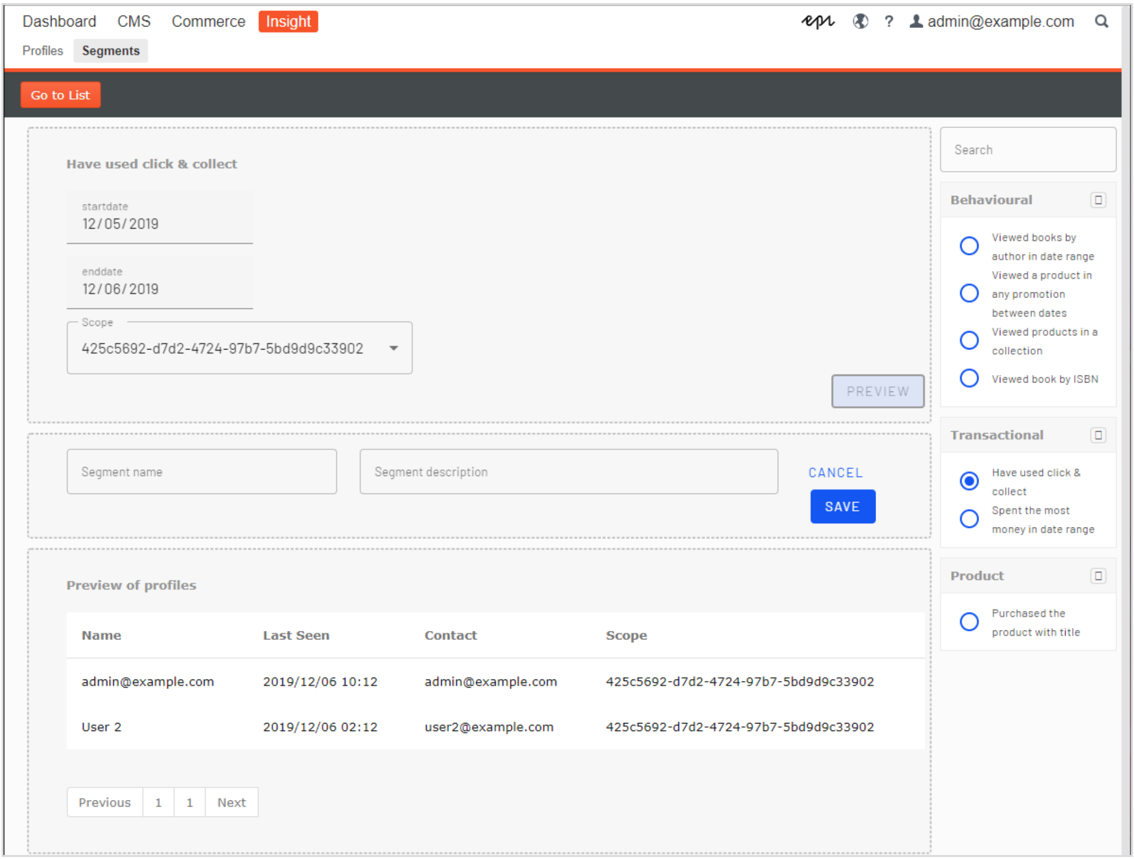
analyze event data. Marketers create segments based on reusable filter definitions and tracked statistics from visitor groups. The images in this section are examples. Your developers may create different filters (and the user interface will appear different to you).

1. In **Segments** view, click **Create a Segment**. The **Segment filters** view appears. On the right side are categories (Behavioral, Transactional, Product) that you can expand to see the filters that your developers created.

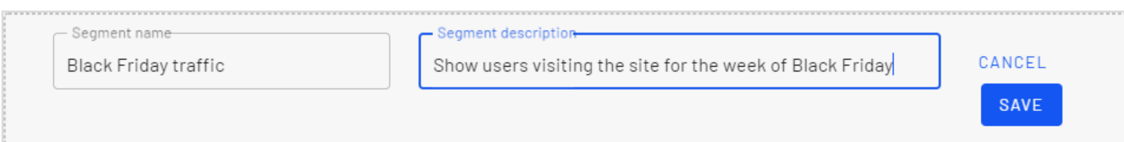


2. Select a filter definition from one of the categories. (In the following image, **Have used click & collect** is selected from the **Transactional** category.) Its parameters appear in the view.
3. Fill in the parameters and click **Preview** to see which profiles the filter affects.

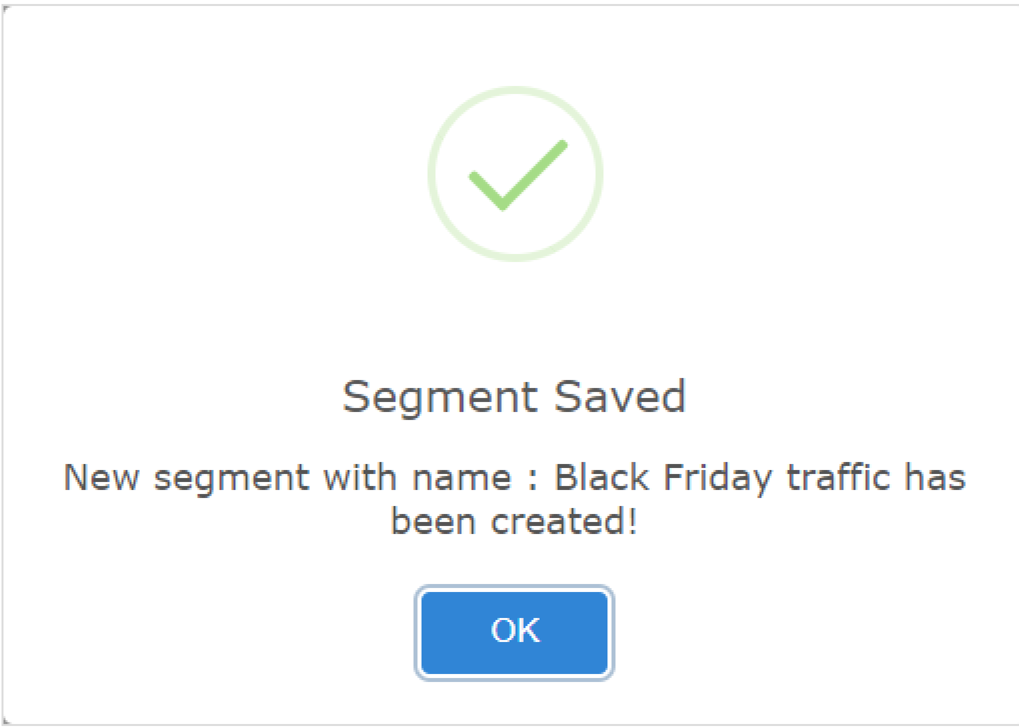
Note: Up to 1000 profiles that match the filter criteria are displayed in the **Preview of profiles** view.



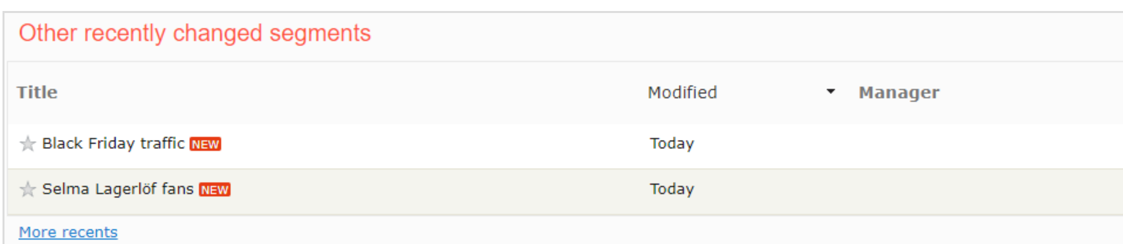
4. Give the new segment a name and description and click **Save**.



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. The cache for an event-based segment is refreshed daily.

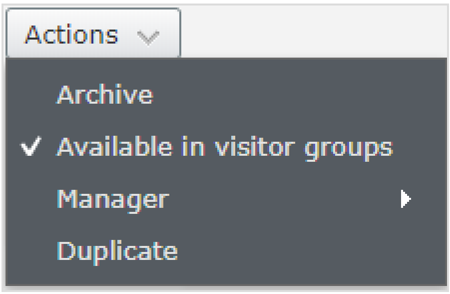


Editing a segment

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 it attributes. Episerver 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.

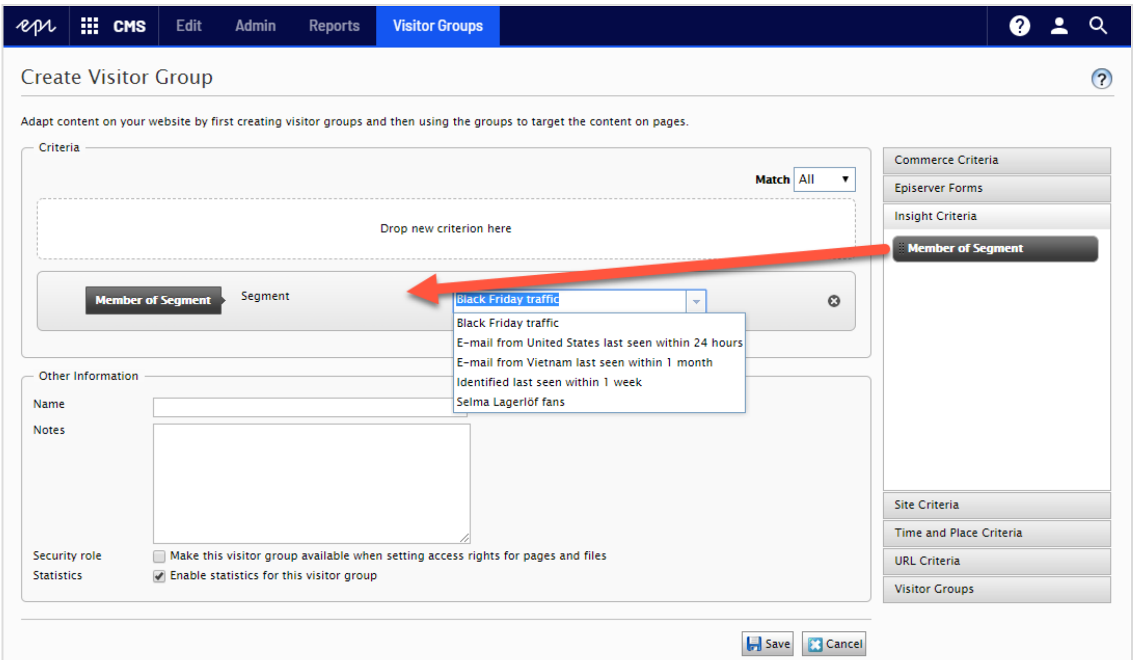
Using a segment as a visitor group

When you create a segment, you can make it available to visitor groups in Episerver 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.

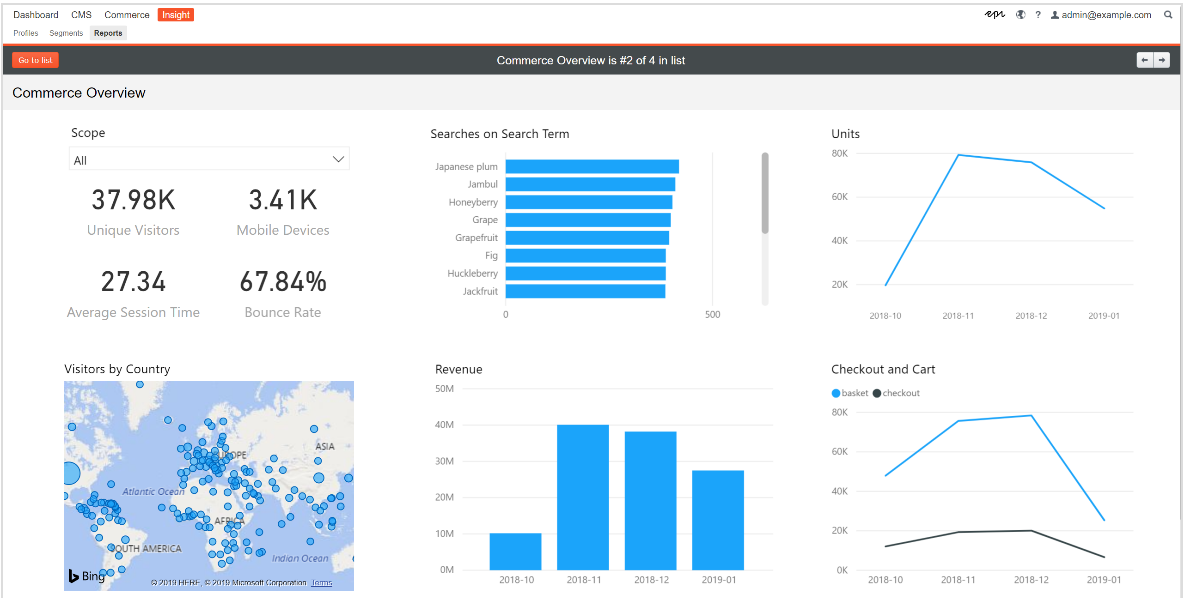
Using a segment as a target group in Episerver Campaign

If you have Episerver Campaign, you can use segments from Visitor Intelligence as target groups for your campaigns. See Creating and editing campaign and Smart Campaigns nodes for how to do this. You can also use segments to filter recipients in Marketing Automation.

See Using marketing segments as target groups for mailing campaigns.

Reports view

Episerver 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.



The commerce overview report contains the following charts for an e-commerce site. The charts help you understand how visitors are interacting with the 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 Visitor Intelligence.

- **Scope Selector**. In the scope selector you can select a scope and see chart for that scope. By default, **All Scopes** is selected and data from all scopes are applied to charts. There is no issue If you have only one scope in Profile Store. But it would mix profiles and track events across all scopes when your site has more than one scope.
- **Unique Visitors**. Number of unique profiles who visited the site.
- **Mobile Devices**. Number of mobile devices used to visit the site.
- **Average Session Time**. The average time customers spend on the site in each session.
- **Bounce Rate**. The percentage of visitors who only visited the first (landing) page in the site 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.

Administering the for the Personalization Portal

The for the Personalization Portal is the user interface for accessing Product Recommendations and Email Product Recommendations features. Features include automatic product recommendations online and through email.

> Note: You can see how a site is configured, but you must contact Episerver 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 Episerver 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

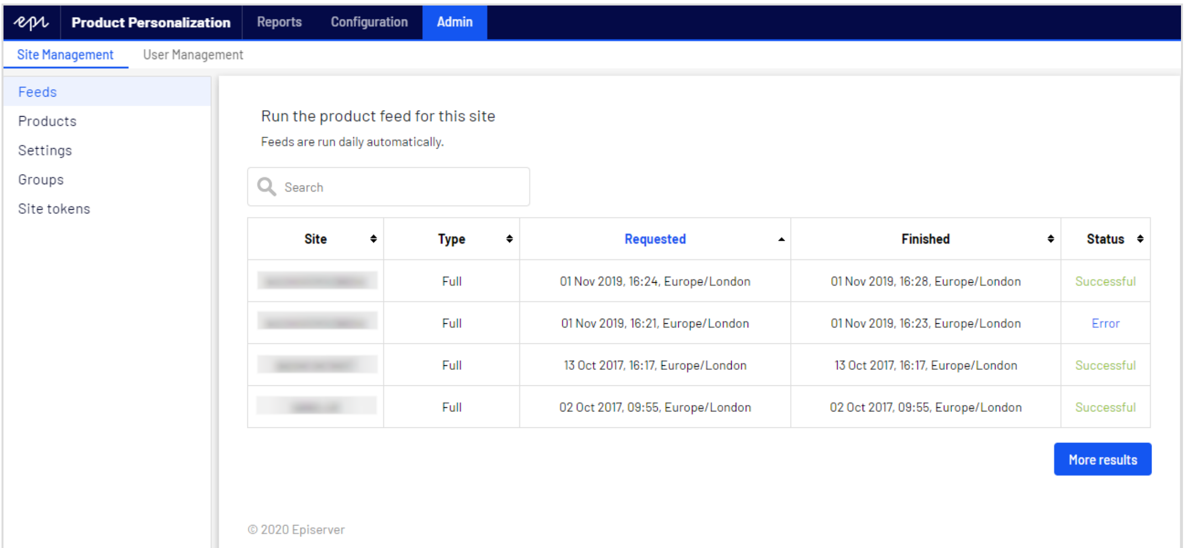
Site management lets you perform the following functions.

- 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.

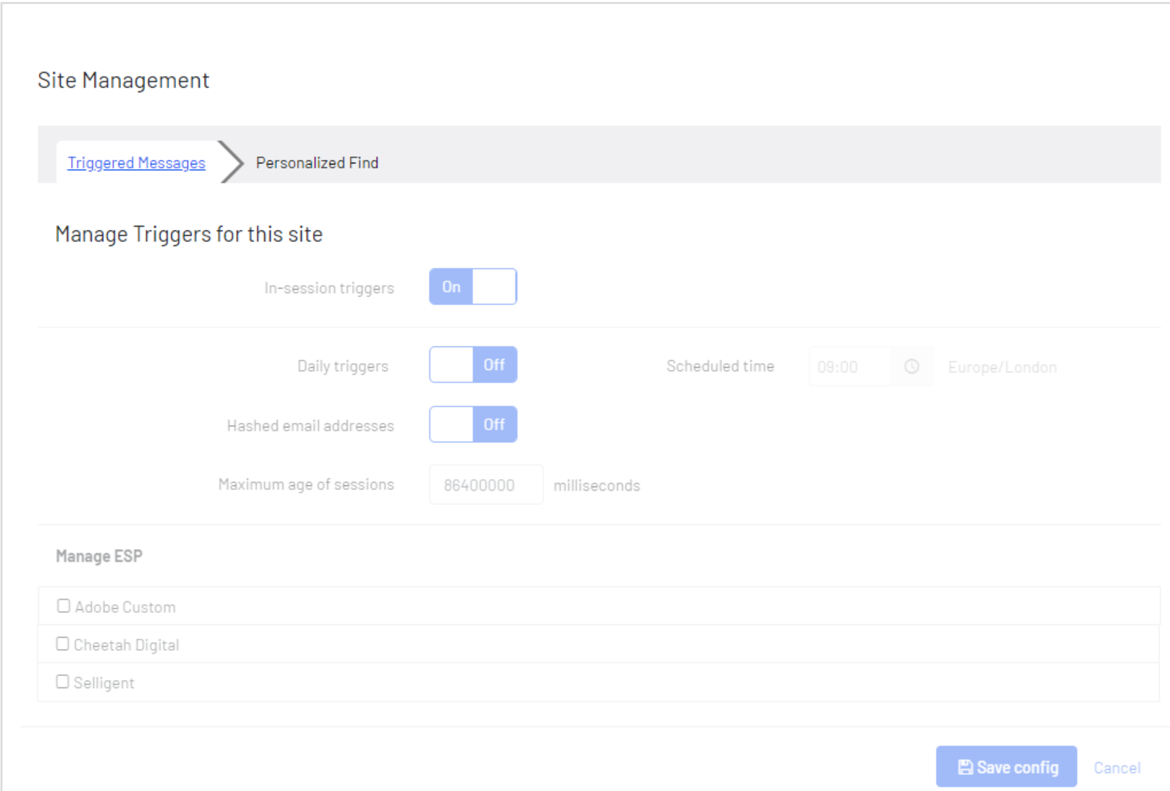
Feeds are automatically imported daily into the Episerver Personalization system, but you can contact Episerver Support to have a feed processed manually.



Viewing trigger settings

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

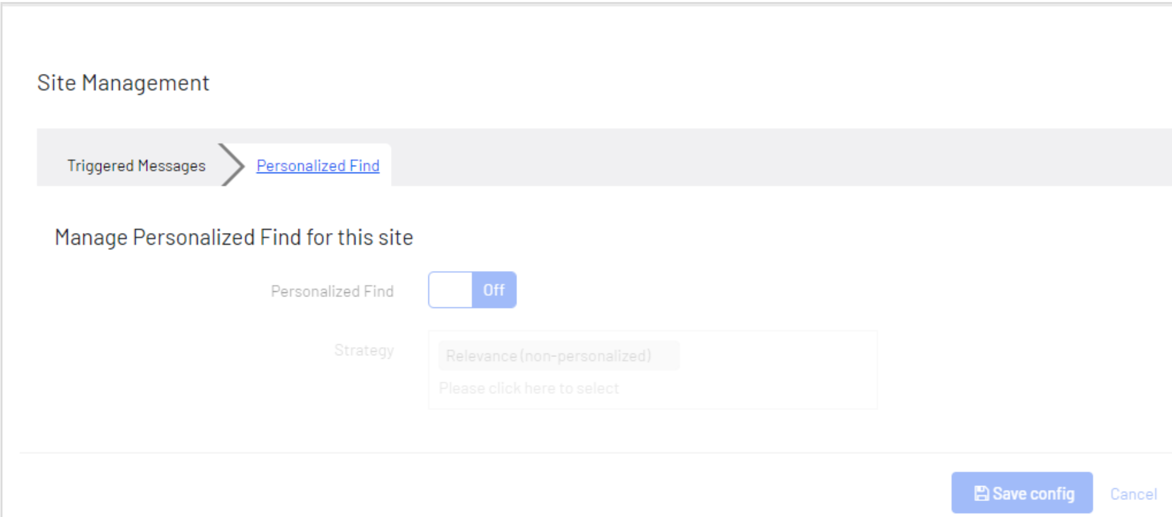
- **In-session triggers**. Shows whether triggers are enabled.
- **Daily triggers**. Shows whether daily triggers are enabled.
- **Scheduled time**. Shows the time when daily triggers go into effect.
- **Hashed email address**. Shows whether hashed email addresses can be viewed.
- **Maximum age of sessions**. 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.



Viewing Personalized Search & Navigation settings

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

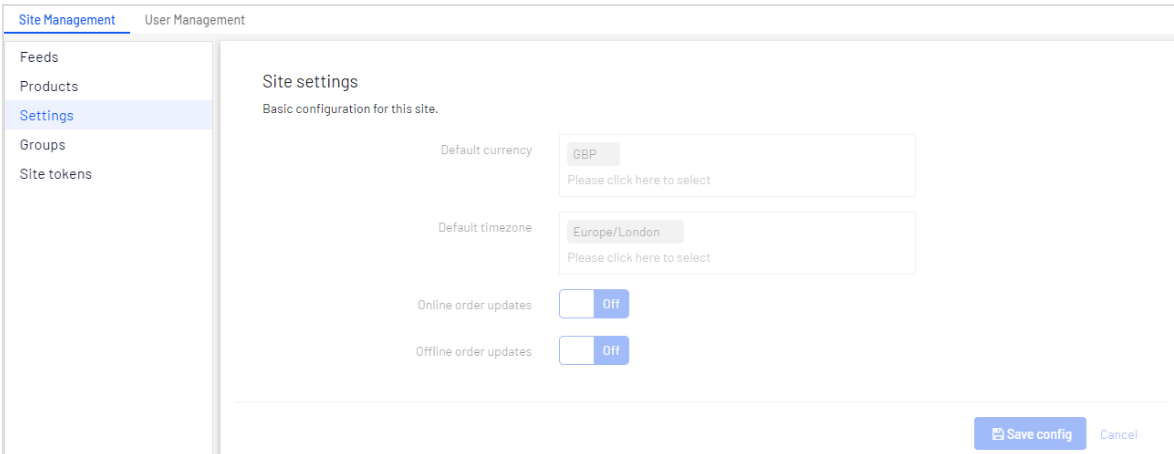
- **Personalized Find**. Indicates whether Personalized Search & Navigation is enabled.
- **Strategy**. Shows the strategy that is select for Personalized Search & Navigation. If there are more than one strategy, you can select another strategy though Episerver Support.
- **Save config**. Saves the specified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



Viewing site settings

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

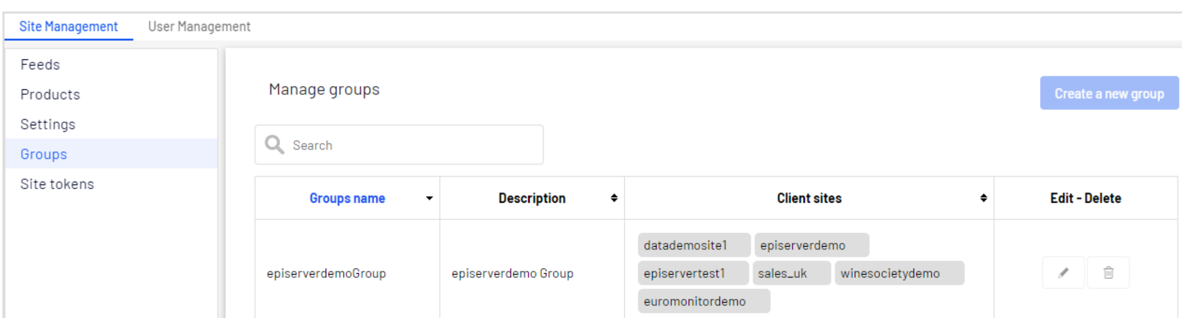
- **Default currency**. Shows the currency for your site.
- **Default timezone**. Shows the timezone for your site.
- **Online order updates**. Shows whether online order updates are accepted. If this is **Off** and a customer wants to add something to their online order, the customer will have to make 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

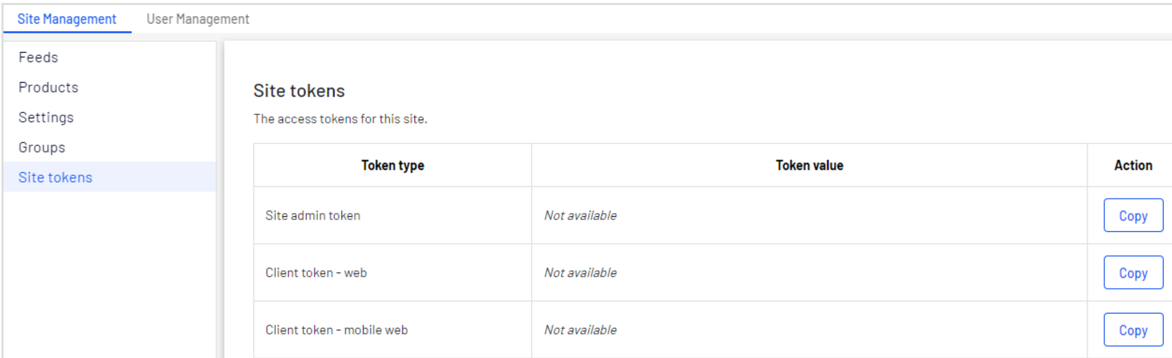
The **Groups** view shows groups that exist for client sites. Episerver Support can modify the following.

- **Create new group**. Contact Episerver 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

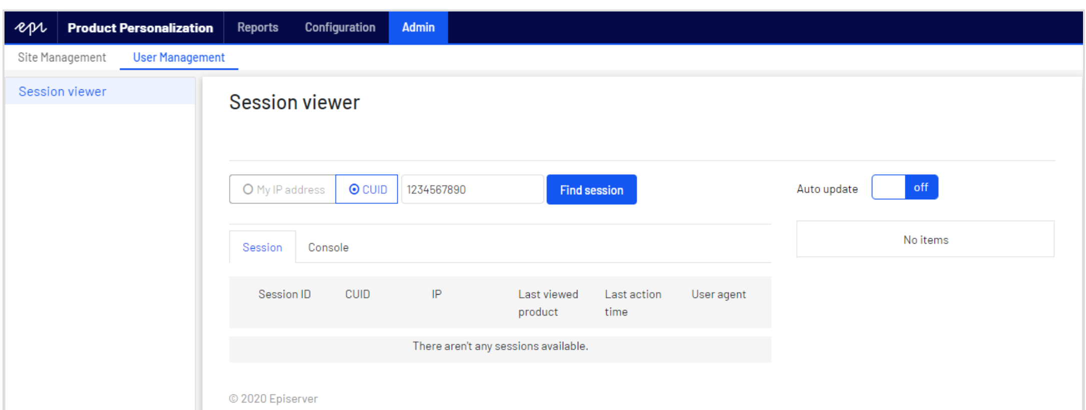
For native clients, the **Site tokens** view shows the values of your tokens. The **Site admin token** is necessary when embedding the Personalization Portal in the Episerverglobal navigation; the**client tokens**are what you provide in the tracking request. SeeclientToken in the *Common Elements* topic on the Episerver World site.



Viewing session data

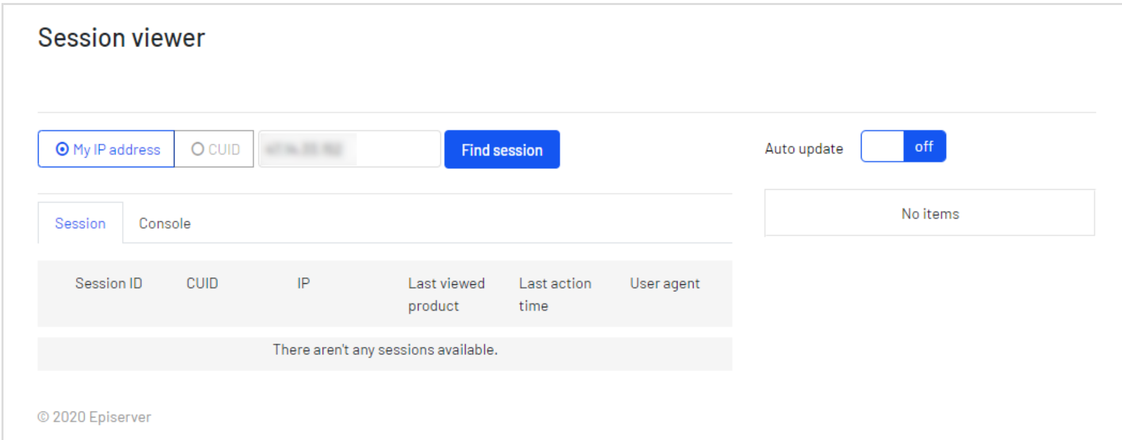
You can view a user’s session activity on a site using their CUID or you can view your own session activity by using your CUID or your IP address.

- To view a user's session activity in the for the Personalization Portal:
  1. Go to **Admin > User Management** > **Session viewer**.
  2. Enter the CUID into the **CUID** field and click **Find session**.



- To find your CUID:
  1. Go to your website.
  2. Press **F12**. DevTools menu appears.
  3. In Chrome, click **Application**. In Edge or Firefox, click **Storage**.
  4. Open the **Cookies** drop-down list and select the domain for your website.
  5. In the table, for native clients, find the value of **epi_RecommendationsTrackingUserId** cookie, or for standalone clients find the value of the **peerius_user** cookie, and copy the CUID number ('cuid=1234567890|xxx_xxxxxxxxxxxxxxxxxxxxxxxxxx_xxxxxxxxxxxxxx').

- You also can enter your IP address to view your activity.



Using visitor groups

Visitor groups is one way of working with in Episerver, using built-in functionality. You can, for example, design a product banner specifically for first-time visitors, or for visitors from a geographic region or market.

You can create your own visitor groups using a set of *visitor group criteria*. Visitor groups must first be created to become available for selection when applying personalization. There are numerous visitor group criteria available across the Episerver platform; see Administering visitor groups in the CMS Administrator User Guide.

Personalization with visitor groups

In Episerver 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.

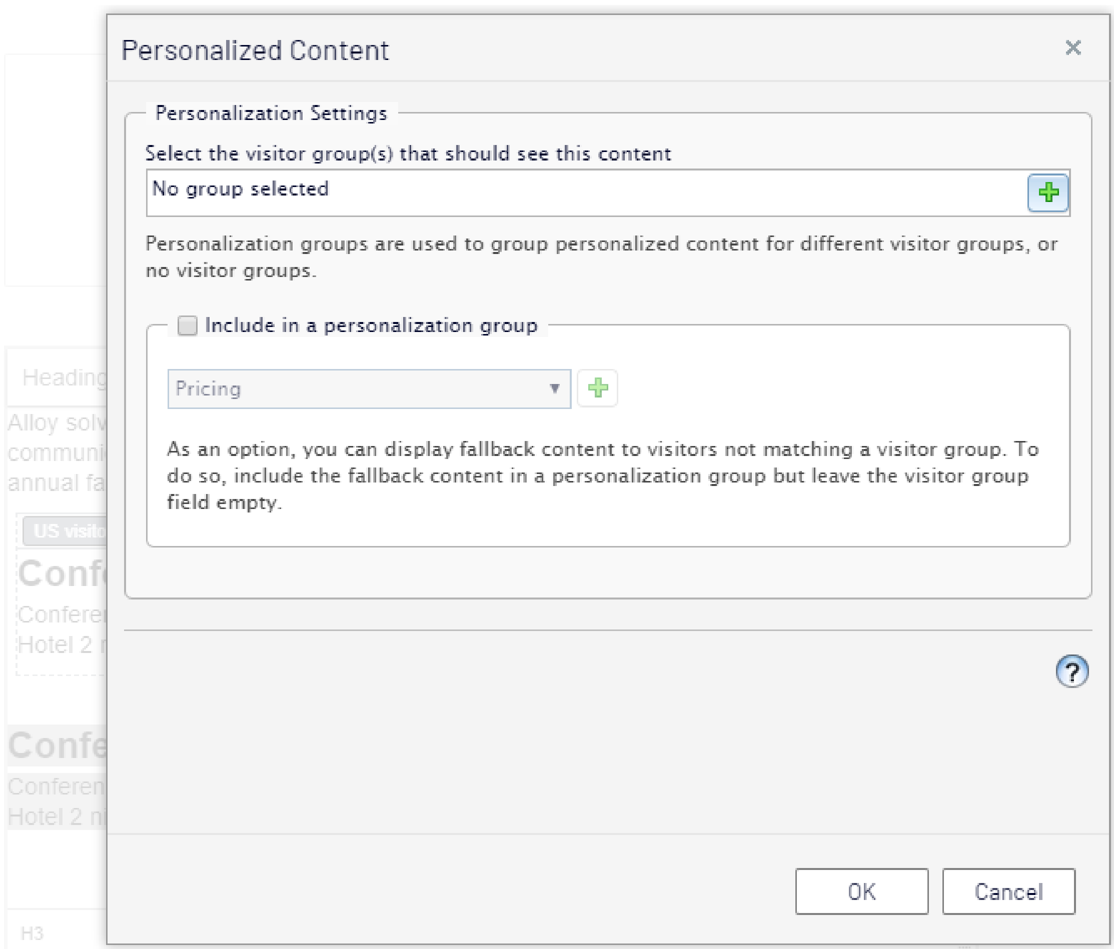
If you have multiple visitor groups, a visitor may match more than one visitor group. You then can use **personalization groups** to group content to avoid displaying the same content twice, and display **fallback content** to visitors who match no visitor groups.

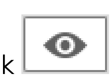
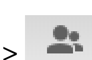
The preview option in the top menu lets you preview the personalized content as the different visitor groups will see it, before publishing.

Applying personalization

In the rich-text editor

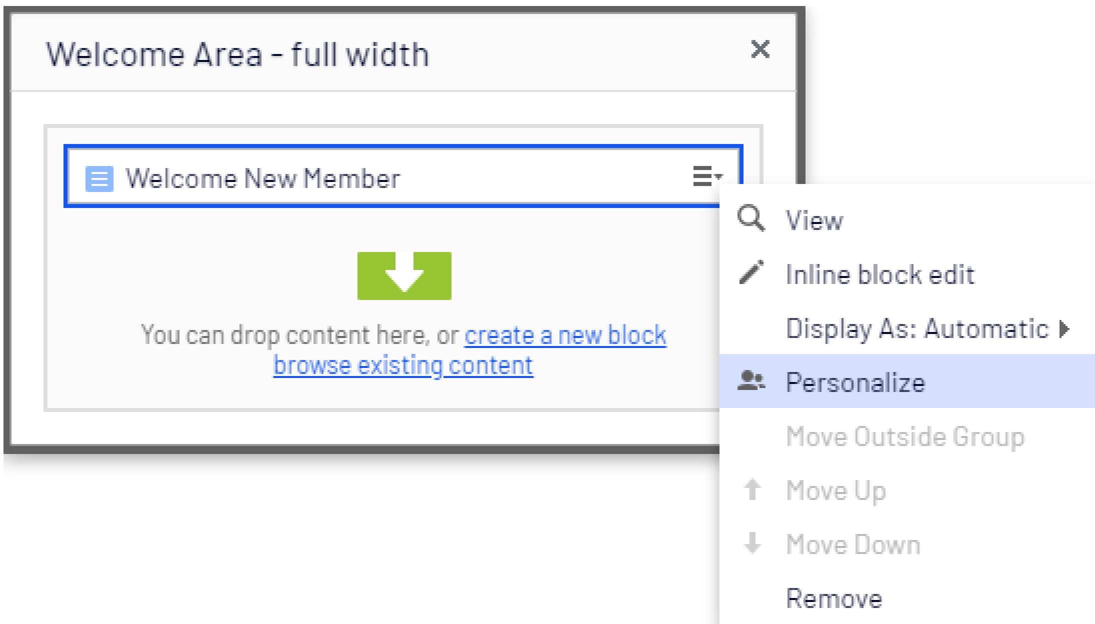
1. In Episerver CMS, open the page for editing, and select the content you want to personalize in the editor area.
2. Click **Personalized Content**  in the editor toolbar.
3. Select one or more visitor groups from the list.



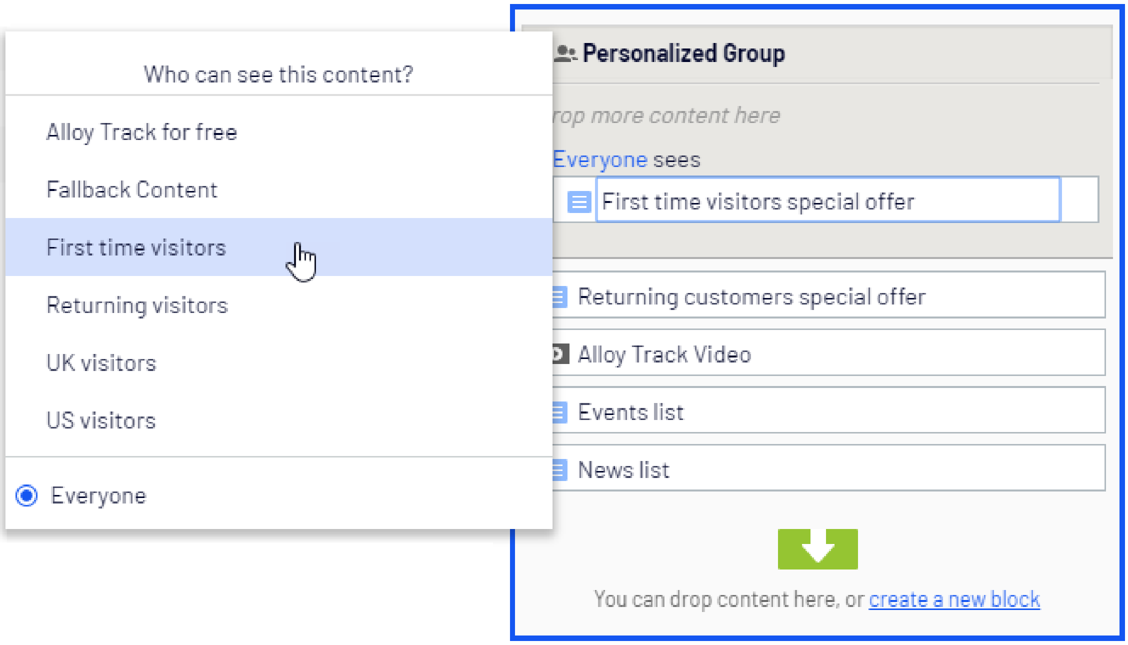
4. Preview the personalized content to verify the result. To do this, click  > .

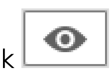
In the content area

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

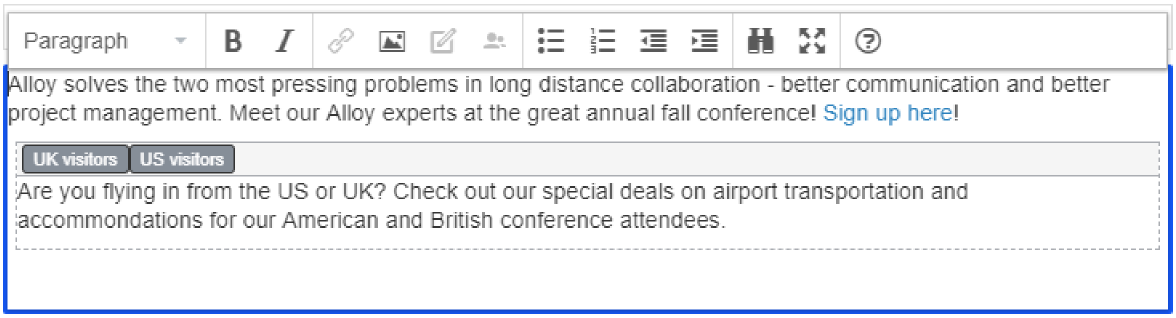
Click **edit** for the personalized content, and update the personalization settings, or select **Remove Personalization**.

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.

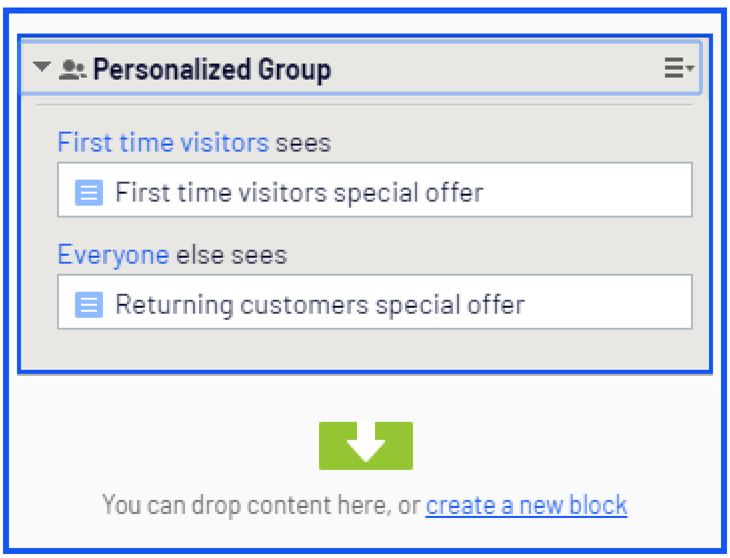
Example: displaying content to multiple visitor groups without fallback

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

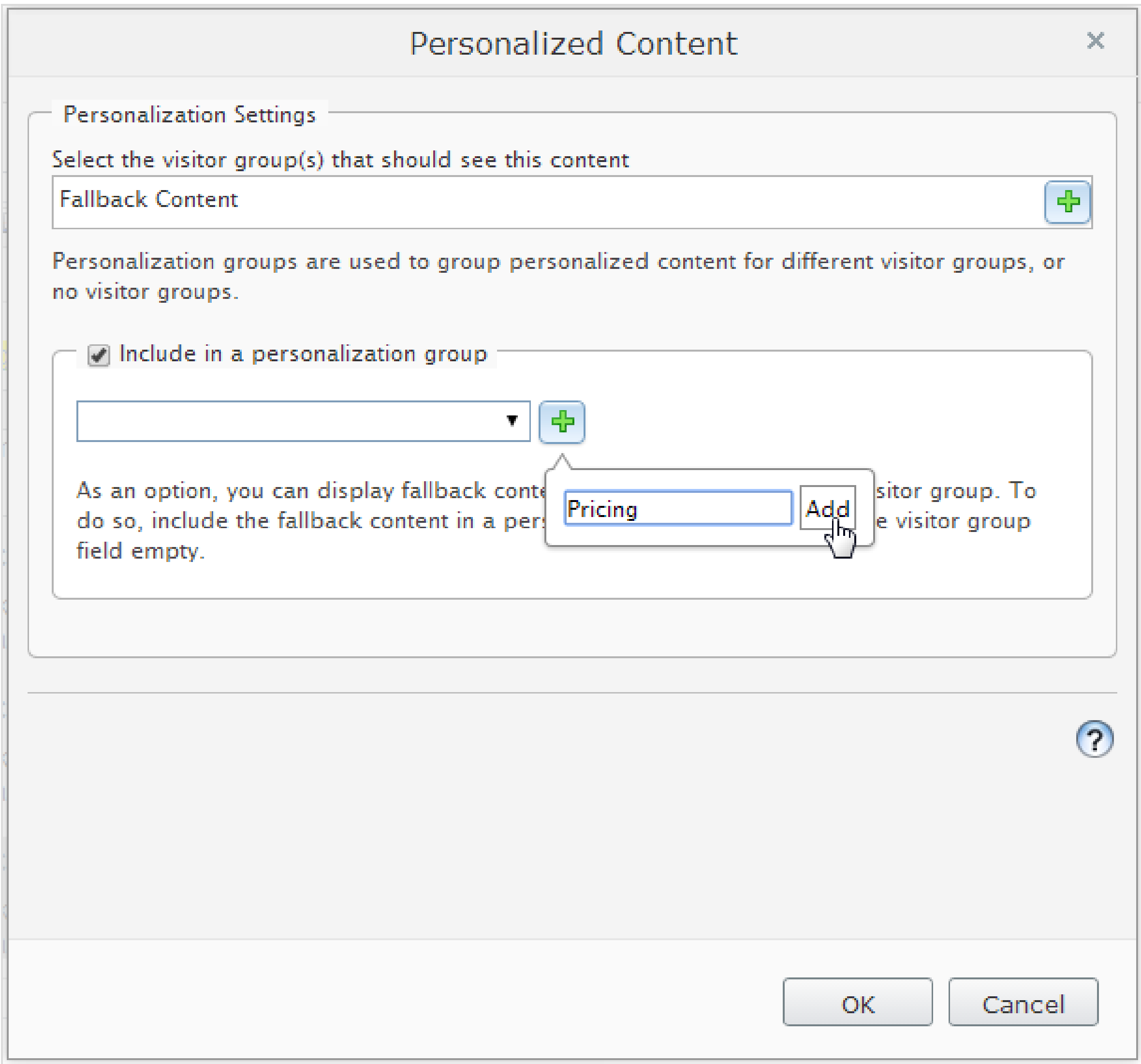
You want to display specific price information to visitors from the UK and US, and other price information to visitors from other countries. To avoid displaying price information twice for visitors from the UK and US, you need to use a personalization group for fallback content.

> Note: The order in which the personalized content is placed within a personalization group does not matter, but placing the fallback

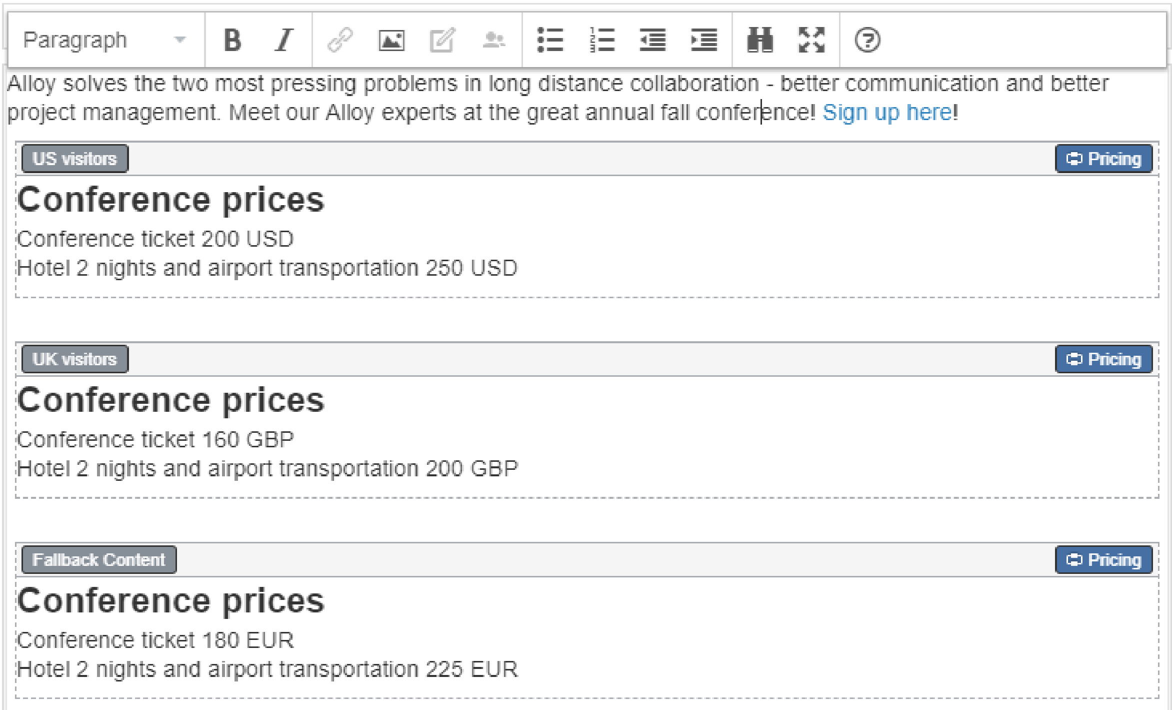
> content at the end makes it easier to follow the personalization flow.

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.



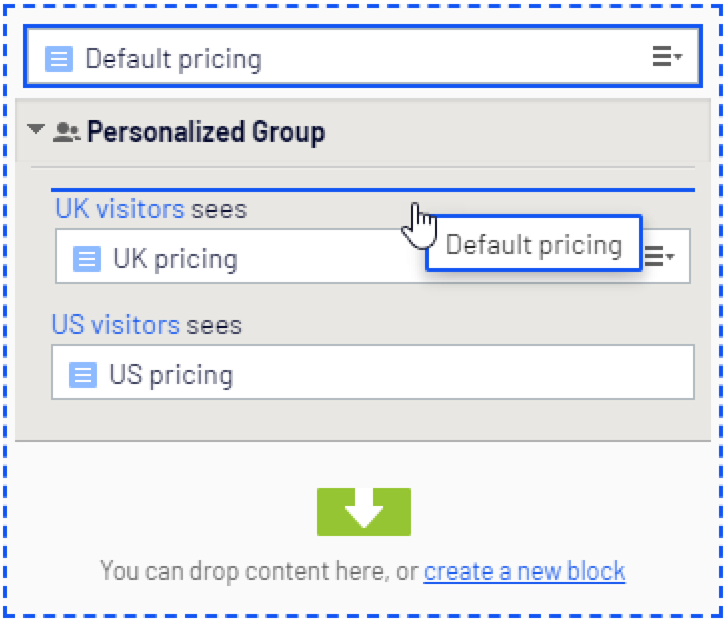
Personalize the price information texts for the UK and US visitor groups, and also **include them** in the **"Pricing" personalization group**. The personalization group appears to the right.



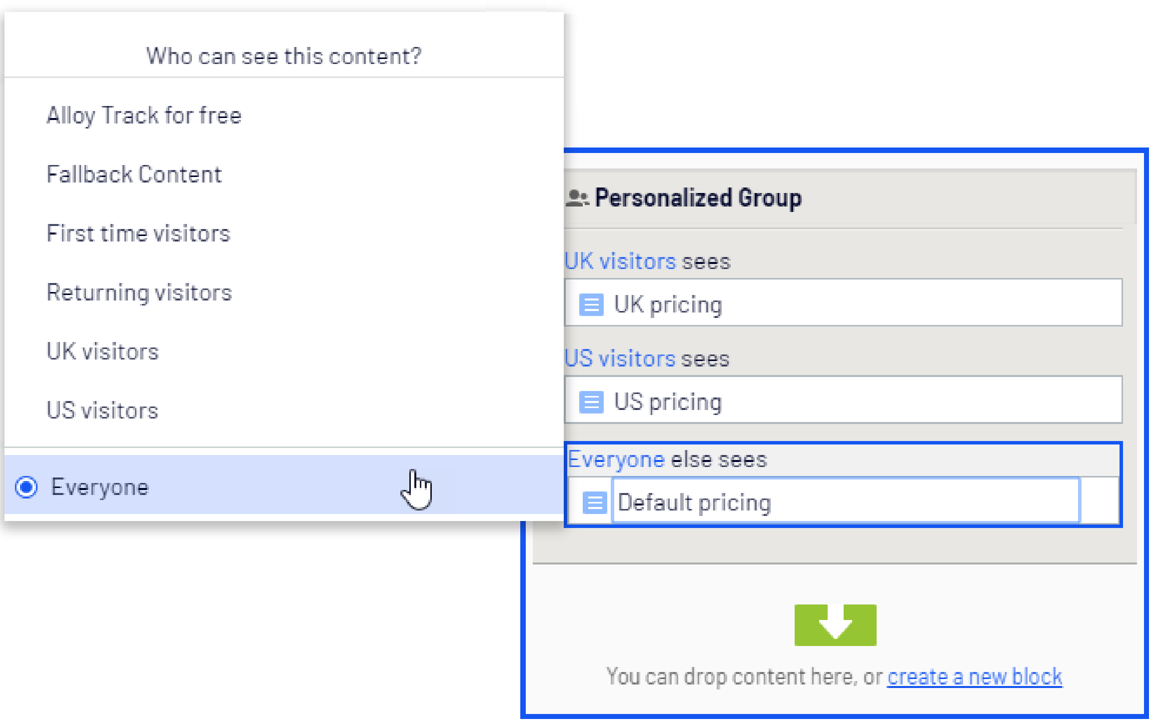
Now the personalization for this content is matched within the same personalization group.

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.

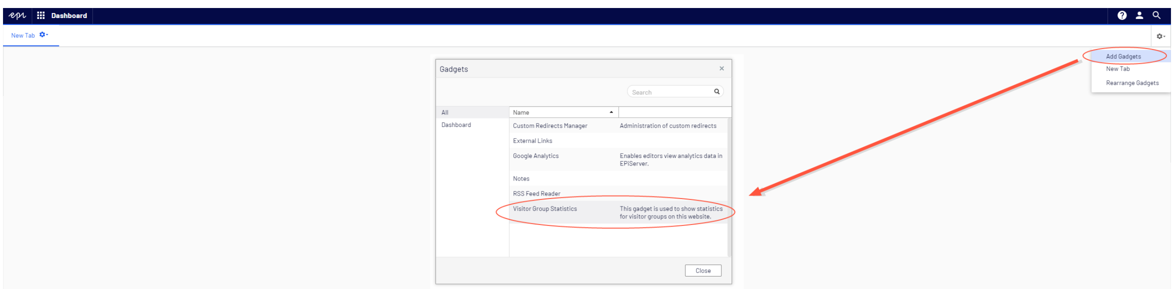


Providing access to content using visitor groups

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 Episerver dashboard; see Gadgets.



Personalizing Commerce content

If you have Episerver Commerce installed, there are additional visitor group criteria available specific for e-commerce scenarios. See Commerce-specific criteria in the User Guide.

Personalization using add-ons

You can also work with content personalization through marketing automation connectors, if you have for example Marketo installed on your website. See examples in the following.

> Tip: You can watch the following demonstration video, Personalizing content with Episerver and the Eloqua database. (2:15 minutes)

Tip: You can watch the following demonstration video, Personalizing content with Episerver and HubSpot. (2:34 minutes)

Tip: You can watch the following demonstration video, Personalizing content with Episerver and Marketo. (2:56 minutes)

Commerce-specific criteria

Episerver 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 Episerver 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 Episerver, 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 Episerver 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.

Episerver Customer-Centric Digital Experience Platform (DXP)™

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

About Episerver

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

For more information, visit episerver.com.

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