Introduction into Recommend/Getting started

Welcome to Recommend's Knowledge Base.

This section provides a series of guides and manuals to help to get acquainted with Recommend, our easy to use, powerful personalisation platform which empowering retailers like you to increase your sales every day.

We have subdivided our support section into several parts for easy navigation.

- ❏ Recommend - account creation and setup. This section showcases the information on how to sign-up and configure the account.
- ❏ Recommend - main features. This one elaborates on all the features of Recommend.
- ❏ FAQ - easy to navigate section which is split into several parts: billing, technical, installation, integration.

We update our Knowledge Base on a regular basis so that you can promptly find the answers to any questions that may arise.

If you are after a prompt response or require urgent assistance, please use the Conversation button in the bottom-right corner of the screen to get in touch with our Live Support team.
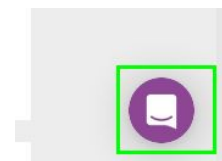
Recommend Guide - review.

This chapter contains descriptions of all Recommend features and guidance on how to perform the following functions:

- ❖ Transform your pages with personalised recommendations in real-time
- ❖ Showcase the best selling products in each category
- ❖ Create triggered email campaigns
- ❖ Create smart segmentation that produces dynamic content for different groups of users
- ❖ Analyse reports that will help you manage sales on your website.

This guide is divided into several parts and each part provides a comprehensive description of every section that is located on the left hand side navigation menu on the Recommend website.
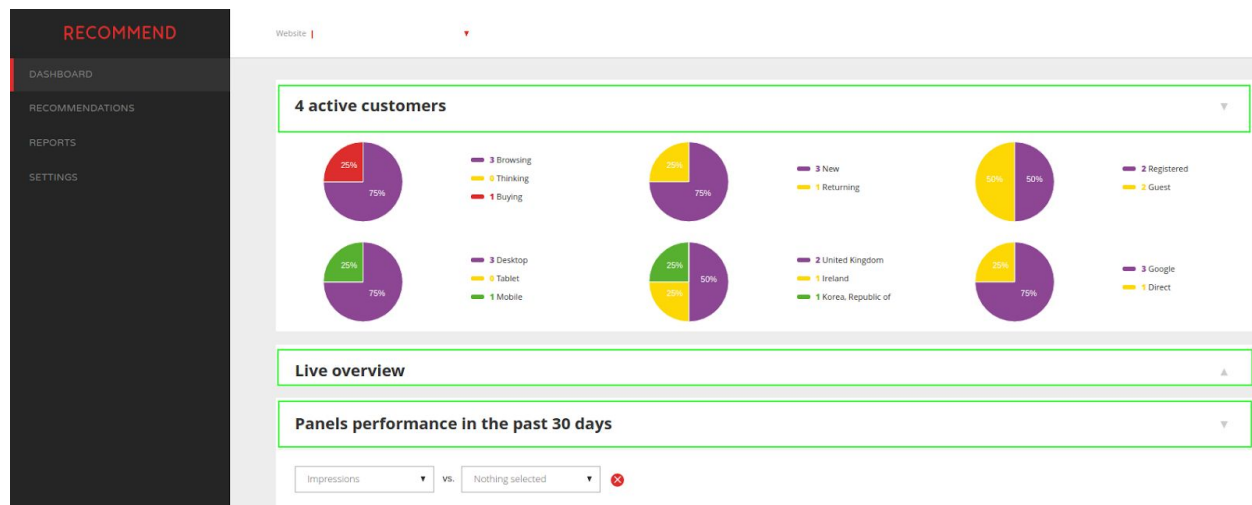
Dashboard

Once you log on to Recommend, you will see a dashboard which reflects customer's behaviour on your website, in real-time.

Dashboard is subdivided into three sections:

- Number of active customers,
- Live Overview,
- Panel performance for the past 30 days.

Each of these sections has a clickable panel, which allows you to either hide or expand the section. These panels are highlighted in green as illustrated in the screenshot below.

The dashboard shows the number of active customers on your website in real-time (although time delays of up to 5 minutes are possible). There are several multicoloured circle graphs each representing different categories of users currently browsing your website.

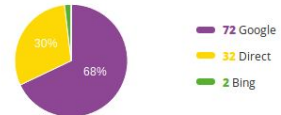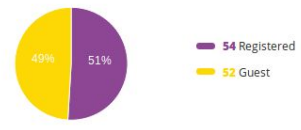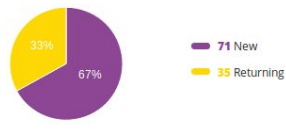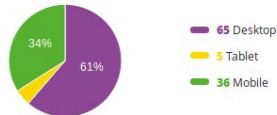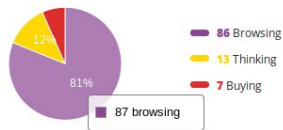Devices being used and countries users are accessing your website from
Users' statuses: Newcomers or returning, registered or guest users
Sources used to access a website (Google, Bing, Direct)
Activity Status
- Browsing - Searching customers
- Thinking - Customers who have already added something to the shopping cart
- Buying - Customers who have proceeded to checkout

106 active customers

- **86** Browsing
- **13** Thinking
- **7** Buying
- 81%
- 12%

87 browsing

- **71** New
- **35** Returning
- 67%
- 33%

- **54** Registered
- **52** Guest
- 51%
- 49%

- **65** Desktop
- **5** Tablet
- **36** Mobile
- 61%
- 34%

- **91** United Kingdom
- **4** United States
- **3** France
- **8** Other
- 86%

- **72** Google
- **32** Direct
- **2** Bing
- 68%
- 30%

Live overview - this section shows the number of customers who are currently browsing your website. Click on the user icon to see additional details such as the user's IP address, browsing history, number of visits and the items placed in the shopping cart if there were any.

Live overview

CUSTOMER DETAILS
R   h He......dez
United Kingdom, 86.175.245.135

View History >

Refferal visit from Google.
Started 45211 mins ago using desktop.
Returning visitor: 8 visits during 32 days.
1 item in customer shopping bag

Description	Quantity	Price	Total
Anti Crease Navy Suit	1	£89.00	£89.00
		GRAND TOTAL	**£89.00**

The **Latest Website Events** section illustrates what customers are buying and looking at in real-time.

Last section on the Dashboard menu shows the panel performance in the past 30 days.

Please note: If you manage more than one site, after logging into Recommend you will land on a different page representing the list of sites you have access to. Click on the selected site name to access the dashboard.

From here you can also add any new websites by clicking on the "Add new website" button. You then need to follow the instructions on how to setup the Recommend tracking on a new website as described here,to complete the process. (Recommend account set up https://docs.google.com/document/d/1sKQnN1fOYga1zNnngmVtcpT3n3Nl3FTR87TZVR_BEbo/edit)

Recommendations

This is the core of Recommend. This section tells you how to configure personalised recommendations, run trigger-based email campaigns, perform smart segmentation for shoppers and transform your pages with best sellers and trending products.

Panels - This section displays all the Recommend panels that should appear on the website after the Recommend module has been installed. Panels are set up automatically during the installation of the Recommend module. Depending on the Magento version you are using, 1 or 2, different templates are used. There is the opportunity to view the automatically created panels in the Magento demo site for testing purposes. Alternatively, panels can also be added to the different pages directly by the developers.

There are two form controls on the right hand side: the Filter Panels control which allows you to filter panels by name and type and filter by segment. More information about segments is available in the following section (**link**).

Every panel is editable. Clicking once on a panel enables you to edit it.

To create a new panel **click** on the **ADD NEW PANEL** button under the title **Panels** as shown below:

You can add newly created panels to display in the slot in the Panel Placement section:

Here is the list of different fields you might come across on the Edit Panel screen for different panels:

Panel ID - ids are created automatically during the building instance process while the Recommend tracking is being setup.

Title - There are default titles that come with the templates. You can change the titles to one you prefer in the Templates section. Here are some examples of titles: 'You May Also Like', 'Customers also Bought', 'Recently Viewed', 'Best Sellers', 'Most Popular'and'We Recommend".

Status:
- Active - please select this status to make the panel active on your website.
- Inactive - select this status from the drop-down menu to hide a panel from your website.
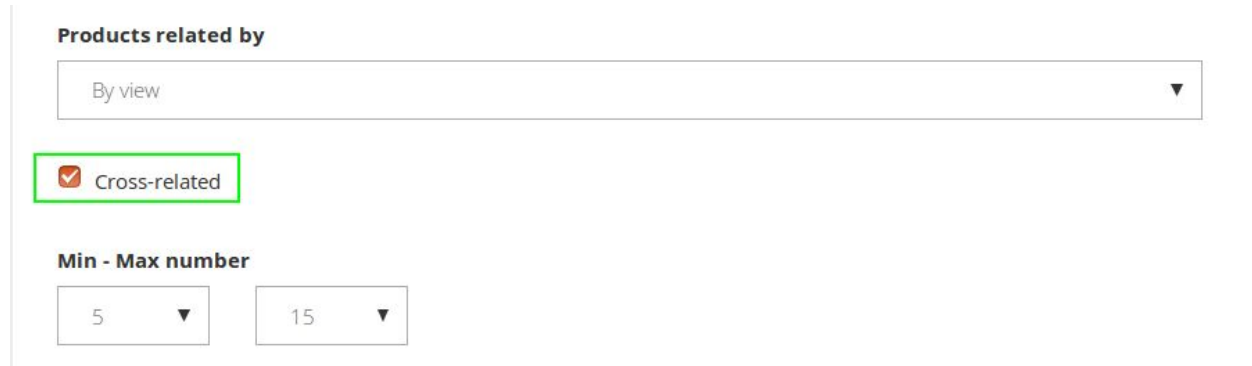
Panel type - please click the link to the following file for more details:
https://docs.google.com/document/d/1cLJ9AW3dQLJlt-lQx4iLlbDoxK8Wk-HBWg_MOWg4WVM/edit

Products related:
- By view - By selecting this value products that have had more views will be displayed.. We recommend you to select by view.
- By purchase - products purchased most often will be displayed in the relevant panel.

Cross-related checkbox - Tick this checkbox i to display products that have similar **characteristics** to those already showing in the Recommend panel. We recommend that you tick this checkbox if you have two recommend panels displayed on a page or in a triggered email. If there are 2 panels on a page, the first one will be showing the most popular products based on the user's browsing history, the second panel will show the products on sale that have characteristics in common with the products from the first panel.
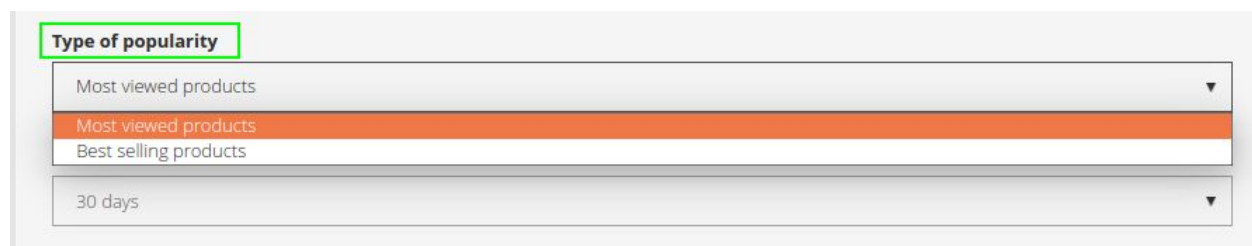
Type of popularity -
Most viewed i.e products with the highest number of product views. This is usually set to the most viewed products.
Best selling products ie simply products that are the best sellers.

Time interval - This indicates the length of time it takes to analyse a user's behaviour and provide relevant information in the relevant recommendation block.

Filter by category

- **All categories** - this is selected if you need to show products from all categories in the relevant panel.
- **Current category** - current category might be used when a panel is added to the category page and the products from only this category need to be shown (e.g. most popular or best sellers).
- **Custom category** - if you want to narrow the product selection down to a particular category, please select Custom Category and in the new field set particular category to display.

"Including subcategories" checkbox - this needs to be checked in case you want to include products from subcategories into Recommend panels.

Min-max number - use these drop-down menus to choose the number of products you want shown in a panel. Minimum is set to 1, the maximum is 20.

Show other panel when empty - in case the existing panel has no items to display, you can choose any other panel to be shown instead.

Template - this field displays the name of the template chosen for the particular panel. Basic templates can be amended according to the needs of a particular customer. There are some pre-written templates which can be easily customised in accordance with the needs of your business.

Rules. You can apply certain rules to each panel to narrow the range of products displayed in the panels. E.g., you select Category Equals Sale for 404 page, which means that only products listed under the Sale category will be showing in the Why not try these panel on 404. Or you can limit your products so that certain SKUs are removed from the display in panels.

There are several default statements available in the dropdown menu. Please create new Product Attributes under Settings - these will be added automatically to the list of statements to apply to the range of products showing in the panel.

To remove Rule, click on **the black cross button** and click on the Save button to save changes.

Statistics - on the right hand side you can see statistics for the past 30 days without including today's data for each panel. The colour and direction of arrows next to statistic figures serve to indicate whether rates rose or fell for the past 30 days. Hover your mouse over an arrow and a pop-up will come up showing the rate for these fields for the period between 60 and 30 days back from today's date.

Please click on the **Save** button at the bottom of the page to save changes.

Please click on the **delete panel** button in case you want to delete the panel.

If you don't need to save changes, please press the Back button in your browser or navigate to any other section of Recommend.

Panel placement

Panel placement was introduced for the marketing team to be able to add and change panels easily without the developers's input. The task for the developers is to markup the page and add slots where necessary to insert the Recommend panels.

Panel type can be changed from the drop down menu to substitute existing panels on any particular page. Please note that not all panels are equally interchangeable.

Templates - Currently this section is used by developers only. They code templates in HTML plus create some special tags which allow them to insert recommendation panels. If you need any help with this, please contact us and we'll help to customise it to meet your needs.

Customer segments - This section is used to address particular groups of users, increase conversions by showcasing more relevant products to customers depending on their average order value, or their most recently ordered items. Let's say you need to create a special campaign aimed only at your customers from London, you can create a banner that will only be visible to them and place this as a panel on your website. For example you can create special banner for customers who spend more than 50 GBP on average on your site and you can set up a special greeting for those customers who haven't visited your website in a while.
The template needs to be amended to allow custom banners to be shown on a webpage. The template needs to be tailored so that it functions as a custom banner in the Templates section.

Click Add statement to add the necessary category to create a new condition which will be shown in a banner/or a panel.
Once you have created customer segments, these will appear in the panel section under Rules. Please tick the checkbox next to your preferred customer segment to show the custom banner or tailor made panel for the particular category of customers.

Rules

All ▼ are True ▼

ADD GROUP   **ADD STATEMENT**

Segments

☐ candle customers
☑ device

SAVE   **DELETE PANEL**

Please note that at first segments appear as inactive. Statuses will change to active themselves in a few minutes.
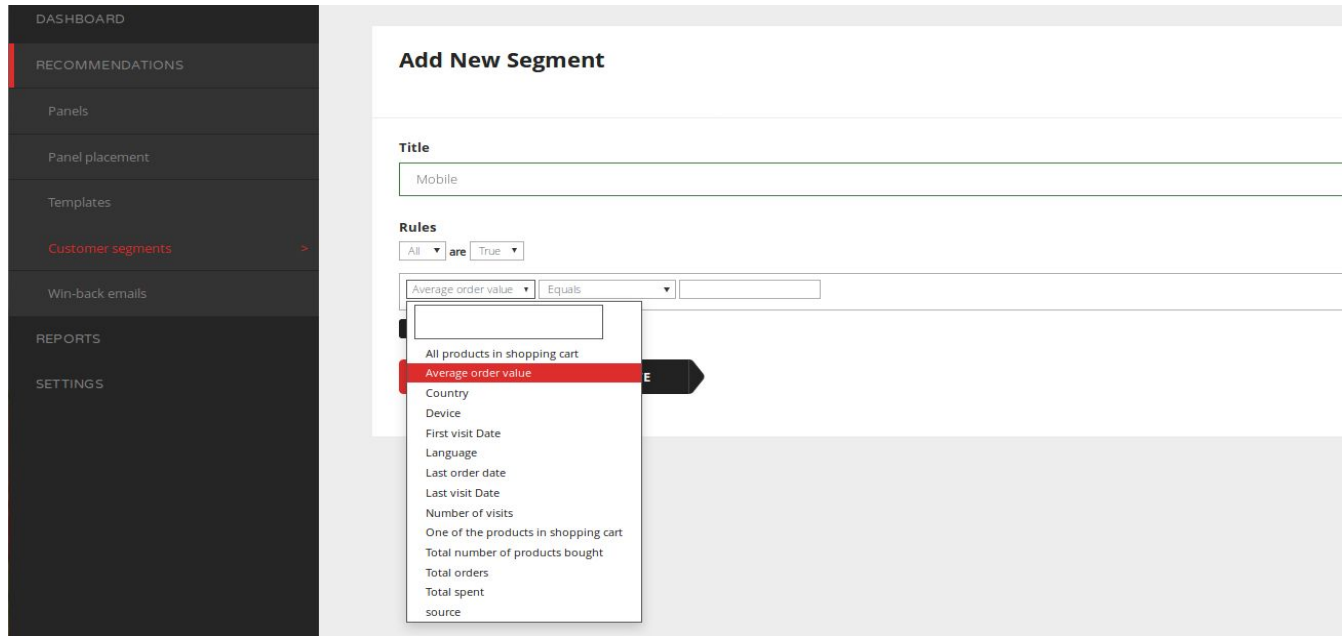
Win-back emails section - This is one to use if you are looking to create personalised triggered emails. This is a powerful tool used to entice your customers through a personalised approach.
There are three types of the trigger-based emails in Recommend: Abandoned Cart, We miss you, and Order Reminder.

You can also add recommendation blocks to the triggered emails.
Please see the link to the guide describing the full range of features available with this functionality. How to setup and test triggered emails:
https://docs.google.com/document/d/16arxwOqp-D8kq5xcp0CsglqCa1_HFFye_UFyIHueUnU/edit

This section contains diverse reports and we will describe each type in more details here.

 Ecommerce

Panel performance

After clicking on the ECOMMERCE section, you land on the Panel Performance page.
On the top of the page on the right hand side click anywhere on the calendar field to **select the time range you want to display statistics for.**

Once time range is selected, all the reports in the Ecommerce section will show in-line with the time range chosen until this range is changed.
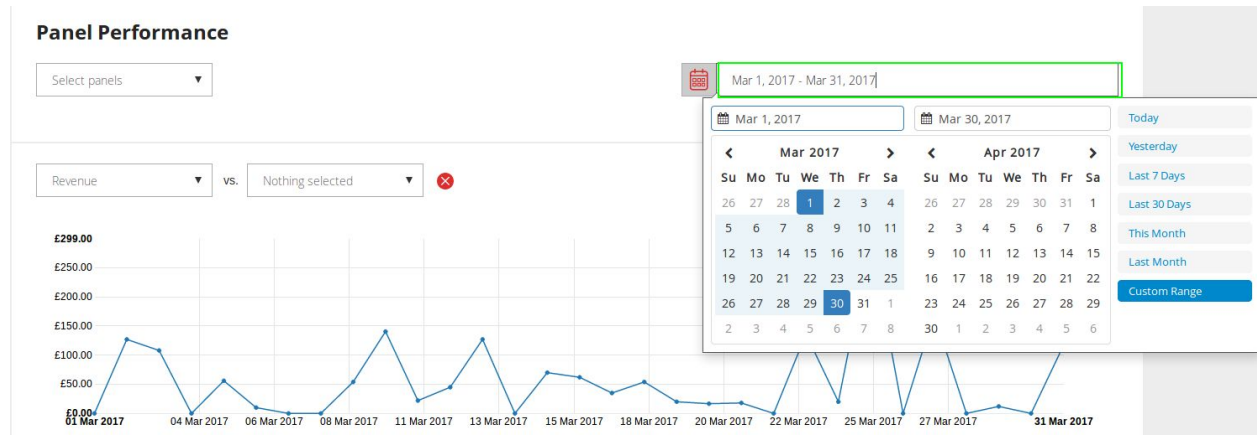
It is possible to sort these columns in ascending or descending order, just use the arrows pointing up and down.

Left click once on the particular panel in the Select panels drop-down menu to view statistics, as shown below:
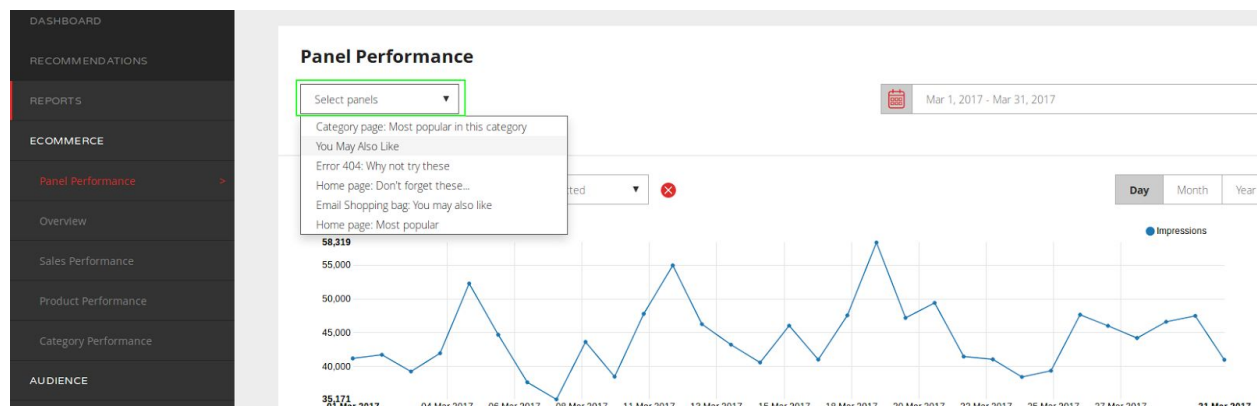
If you select only one panel, the totals will be relevant only to this panel. Statistics can be viewed for more than one panel at a time.

Several characteristics can be displayed in the graph for comparison purposes at one time, e.g. you can compare revenue vs click rate. Click on the red cross button to clear the second field.

By default, statistics are set to show data on a daily basis. Please select appropriate time ranges that allow you to view analytics breakdowns per month and per year.

Panel Performance

Select panels ▼

📅 Dec 1, 2015 - May 1, 2017 ▼

Impressions ▼ vs. Nothing selected ▼ ❌   Day | Month | **Year**

68,758,333

50,000,000

2016
■ Impressions 68,758,333

● Impressions

1,038,460
2015

2015

2017

Totals:

| 117,289,786 | 49,565 | $1,757,256.11 | 10.10% |
| Impressions | Qty | Revenue | Click Rate |
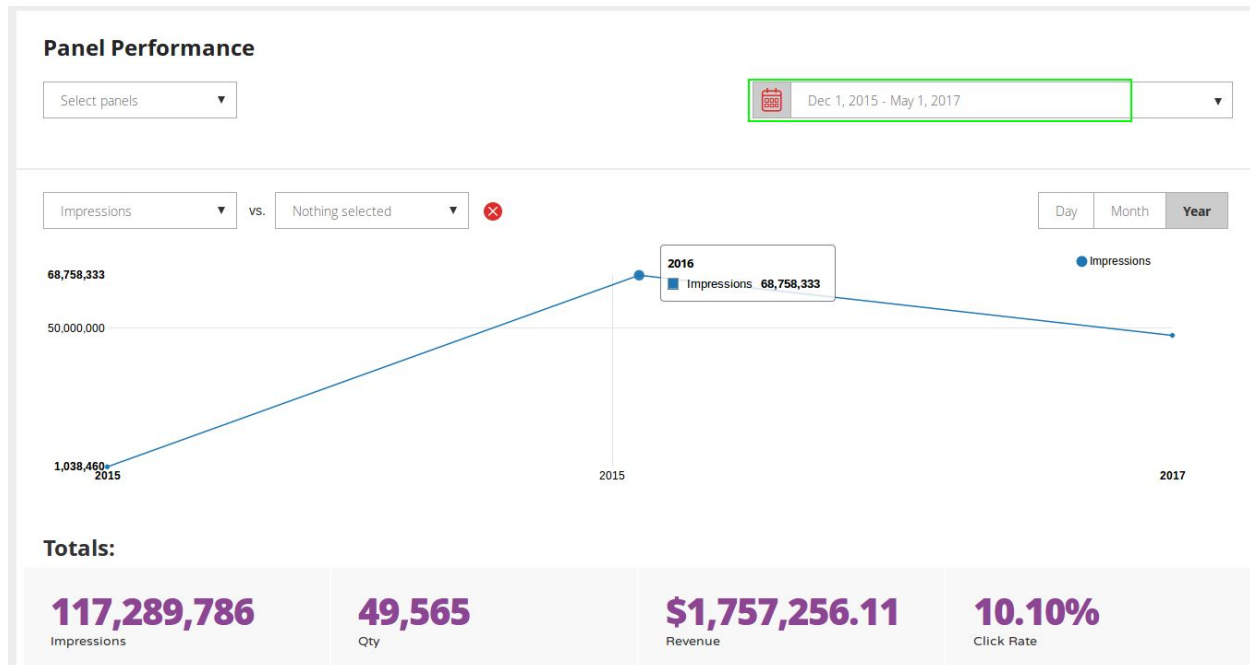
Impressions - this number illustrates how many times the Recommend panels appeared on the website.
Quantity - number of products sold through the panels
Revenue - revenue earned through panels.
Click rate - **The number of orders divided by the number of site visits.**

The last section shows detailed statistics for each panel, such as click rate and revenue earned through each panel over a particular time period.

Overview

Overview - this shows the total revenue for the time range selected and assisted revenue, which means revenue earned with the help of the panels.

Conversion rate - The number of orders divided by the number of site visits expressed as a percentage.

Assisted conversion rate - the number of sales and conversions the panel assisted, expressed as a percentage.To check. The number of orders divided by number of visits using the recommend panels.

Sales performance - This panel show analytics in comparison with one another, i.e amount of products sold Vs amount of assisted products sold, total revenue vs assisted revenue and the number of assisted vs the total products sold. This panel also provides information on orders, their total values and assisted value pointing to the panel which assisted in making the sale.

Product performance - this shows the products that are most popular and are most commonly viewed and bought on the website.

Conversion rate is calculated by taking the number of products sold and dividing that figure by the total number of products viewed. If quantity sold equals 3 and product views are 4 then this would yield a 75% conversion rate.

Unique purchases: is the total number of times a specified product (or set of products) were part of a transaction.

Category performance - reflects the same information as described above for the product section but this is specifically for the particular category of product represented on the website.

AUDIENCE - Next section

Page views - How many page visits in total were tracked on your website over a particular time period. This number predetermines the pricing plan you are eligible for which means that your monthly payment depends on your number of page views. More information is available here: https://recommend.pro/pricing/.

Site visits - reflects the number of times the website was visited, omitting repeat visitors.

Catalog
Products - in this section you can see the lists of products represented on the website. The online status means that a product is live online. If the status is offline, this means that these products are no longer being sold.

This section also provides the following information: revenue for any particular product sold on your website. You can use this section to check what is the most popular product on your website.

Email marketing.

This section contains reports related to your triggered emails performance and this will contain information in case you are sending these emails.
This section is described in detail in the triggered emails guide.

Settings

General
Once you click on Settings you are landing on the General section. This section provides basic information such as website URL, domains and alternative domains, website name and status.

Status

- Active - which means panels are available on a Live website.
- Preview mode - this means that Recommend panels are not visible to the public. Preview mode is enabled by clicking on the enable preview mode URL available on the General page. This is the testing mode to see how panels look on websites before making them Live.

To make the Recommend panels live please change the status from Preview mode to Active in the drop-down menu and click Save.

Product attributes

Attributes can be used for filtering products in panels. e.g. you can filter down to some specific brands in a certain panel. Or you can filter down to products which are on sale only etc. Attributes can then be used on the front end, when the panels are displayed

This applys manual filters for selected panels only. For example, if you add a brand as an attribute then on the brand page you can display most popular or best selling products from that brand only. If you add product type as an attribute, then you can filter panels based on certain product types.

You can add product attributes in the Admin Panel of Recommend:https://control.recommend.pro/
Go to Settings - Product Attributes - click Add New product Attribute at the top of the page. Give it the title and the code that you want. Code then will be used in the Recommend template. Then go to the Magento Admin Panel and go to System - Configuration - Recommendations. Here, click Add Attribute and add Recommend attribute.You should be able to select the relevant Magento attribute from the drop-down menu.
Click Save Config.

Product attributes can be filtered by type and by code and title.

Customer attributes

Customer attributes are set in the same way as described above for product attributes.
This filter can be used to show some products to a particular category of customers. For example, if a customer has some rewarding points this will inform the creation of a banner which will show items only to this category of customers. **Customer Attributes need to be added in Recommend first and then mapped in the Magento admin panel**

Users - this shows a list of users that have access to the website and their levels of permissions.
Two levels of access are possible:

Full and Restricted - the only difference is that the users with restricted level do not have access to the billing information.
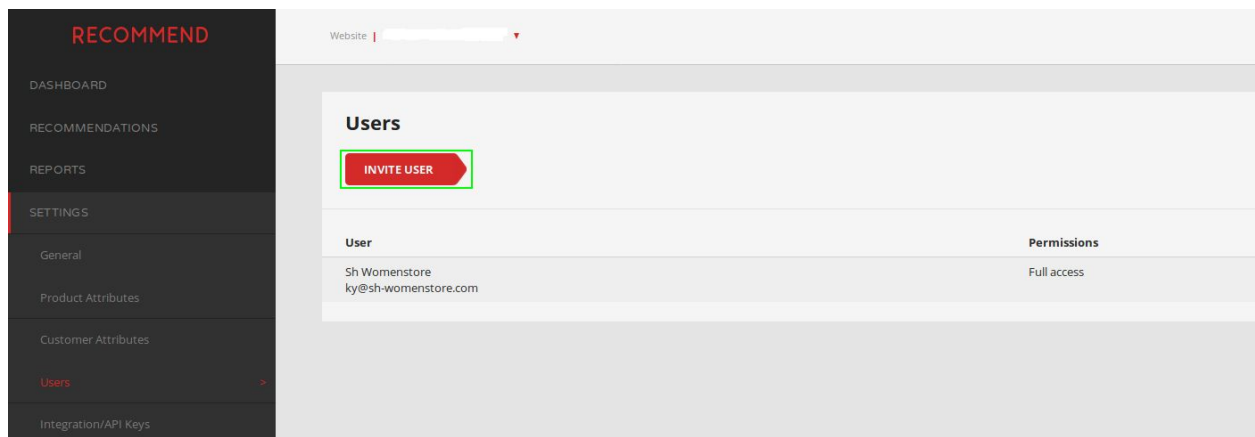

If you need to grant someone access to the website you are managing, please click on the Invite User button on the top of the page.
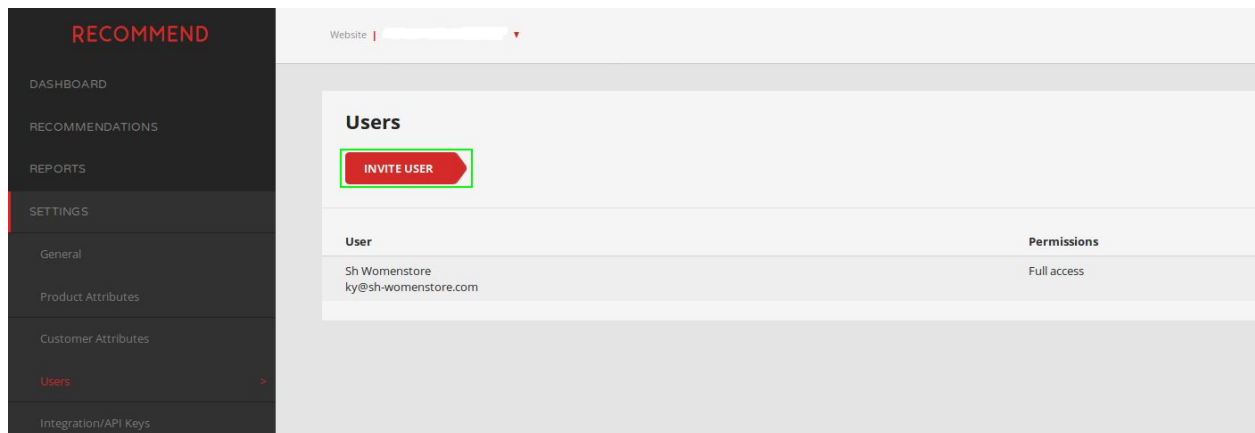
If you have Full Access, please click on the black cross button to remove permissions from the particular user as shown below:
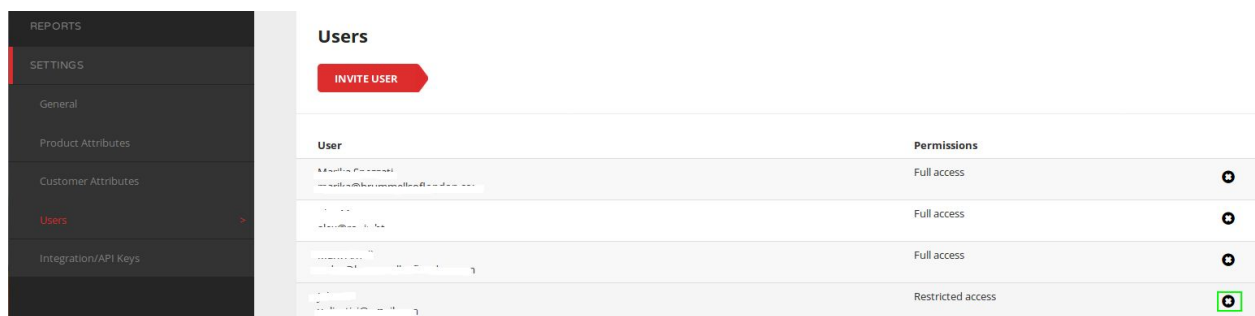
The message confirming permissions removal should appear on the screen in case the operation performed as expected.
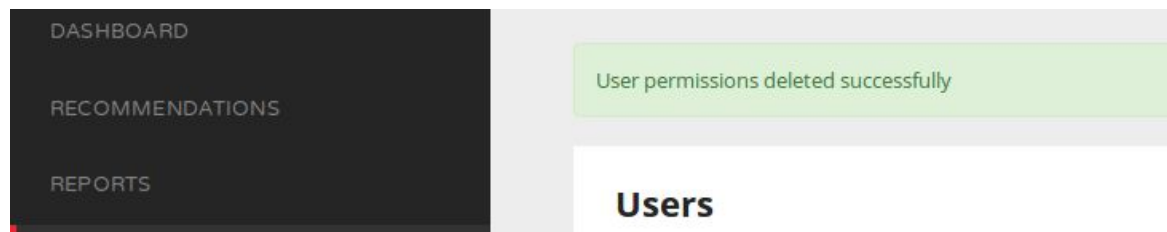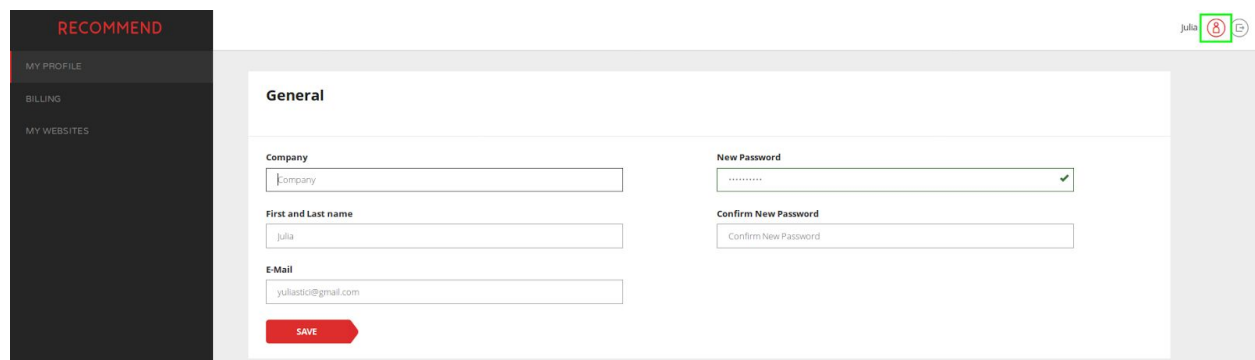

Integration / API keys

This has the automatically generated api key and the unique account ID.
You can add a new API key from here.

User section
Please click on the Profile button to be able to change your password for the Recommend panel on the My Profile tab. On this section all fields are editable and all the information available can be updated and saved.

Billing - Billing panel shows your payment details, monthly costs and your next bill date and is used to enter credit card info to transfer from a free trial to a payment plan or to a different payment plan. The payment is taken automatically within 30 days.

My websites - Please click on **My websites** to be able to see your website or the list of websites you are managing through Recommend.

Please click on the sign-out button to log out.