Test a Recommendations Recipe

Once a recipe is complete and trained, you should test it with a test group before publishing to ensure recommendations display the way you intended for a sample group of visitors. Using a test group makes it easy to test recipes with the visitors you care about to confirm that the recipe returns product or content recommendations that will resonate with them. A test group consists of specific and/or random site visitors (referred to as "users" in Evergage). You can find participants for a test group by referring to different "audiences" created by a selection of filters or from the segments you've created in Evergage. Audiences in Evergage are groups of users (i.e. individual site visitors) or accounts (i.e. companies) aggregated based on certain parameters like behaviors exhibited on your site.

You can create up to 15 test groups with up to 20 sample users based on filter parameters or an existing segment of users. You can use one or more test groups to simulate the recommendations the selected recipe will generate on your site for the sample users. Evergage includes one sample test group of users. If your site has revenue tracking enabled, the test group will include users with the following parameters:

- New, Non-Buyer
- New, Buyer
- 1yr, Buyer, High LTV
- 1yr, Buyer, Low LTV
- 1yr, Non-Buyer
- 2yr, Lapsed, High LTV

If your site does not have revenue tracking enabled, the test group will include users with the following parameters:

- New User
- 6-month User

This Article Explains

This article will give an overview of how to test recommendations recipes using test groups. Refer to related articles for information on Recommendations including creating a recipe and adding ingredients, exclusions, and boosters.

Sections in this Article

- Edit or Test with an Existing Test Group
- Create a New Test Group
- Add Users to Test Group
- Find users to add to the group
- Test Configuration
- Simulation

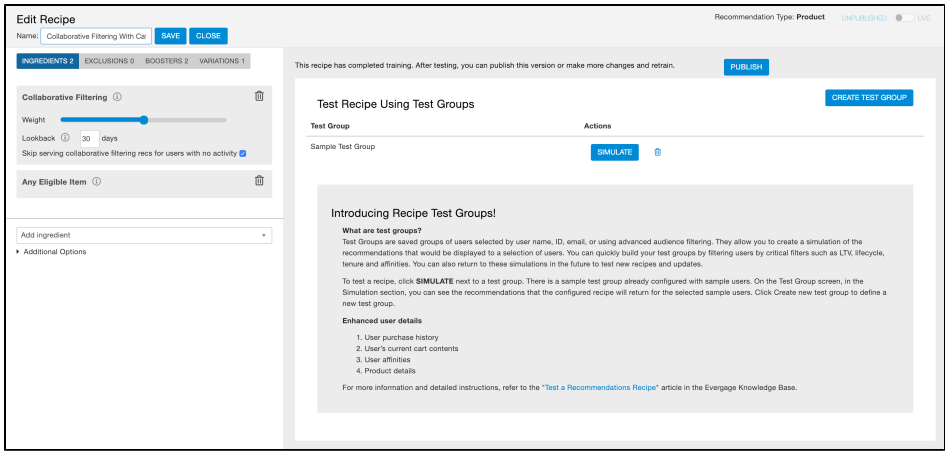
REQUIREMENTS

You must have *Evergage Recommend* integrated with the dataset in which you are configuring the recommendations. Please contact your Customer Success representative to complete your *Recommend* integration.

Edit or Test with an Existing Test Group

You can test your recipe with an existing test group or create a new one. This gives you infinite options for testing your recipe with users with varying levels of behavior on your site to ensure that everyone has a good experience.

1. Click **SIMULATE** next to the test group you want to use. This will open the *Recipe Simulator* in a new tab so you can toggle between your recipe and the simulator
2. If you haven't created a new test group, you will only see *Sample Test Group*
3. Click the test group name to make changes. Be descriptive so you can quickly see the components of the group (i.e. *High LTV Loyal*)
4. Click to expand Add Users to Test Group to make changes to filters

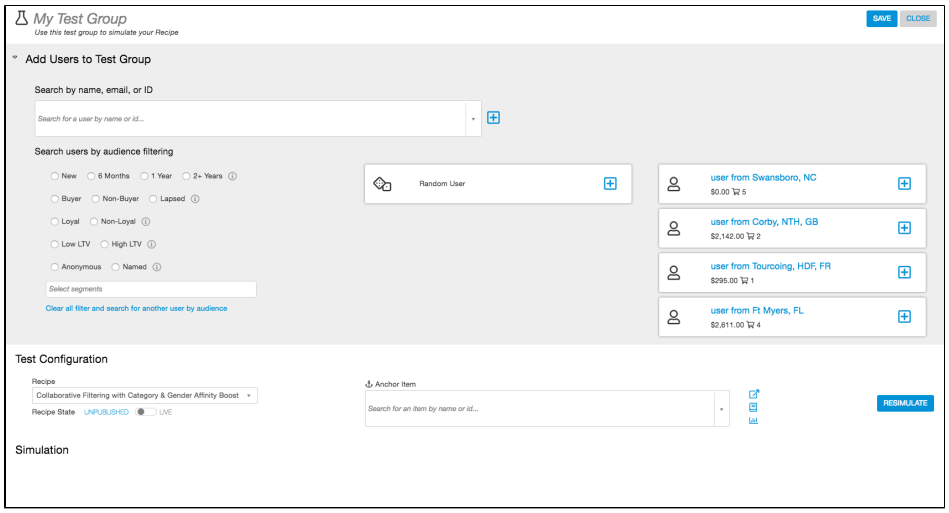


5. Click to remove a test group

Create a New Test Group

You can have a total of 20 test groups, including the Sample Test Group provided by Evergage (which may be edited or deleted).

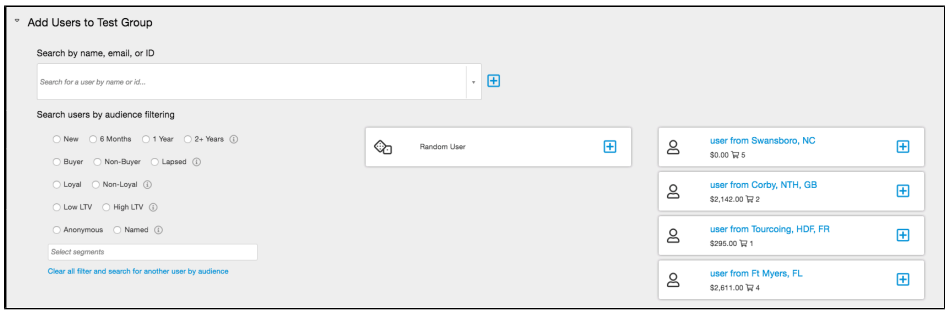
1. Click **CREATE TEST GROUP**
2. Click the test group name to make changes. Be descriptive so you can quickly see the components of the group (i.e. *High LTV Loyal*)



Add Users to Test Group

You may add up to 20 users to each test group. Remember to click **SAVE** after making changes.

Find users to add to the group



1. *Search by name, email, or ID* - Enter a name, email, or user ID in the search field to find a specific visitor to add to the test group (i.e. yourself)
2. *Basic Audience Filtering* - Select one or more of the radio buttons next to the desired audiences to find and add users who match that specific criteria. Evergage will output up to five matching users including a *Random User*
    1. Click to the left of a row with a selected radio button to clear any selections
    2. Click **Clear all filters and search for another user** by audience to clear all selected filters and segments
3. *Advanced Audience Filtering* - Select one or more segments of users to add an additional layer of filtering in the context of your business
    1. Click **Clear all filters and search for another user** by audience to clear all

selected filters and segments

Click to add a visitor to the group

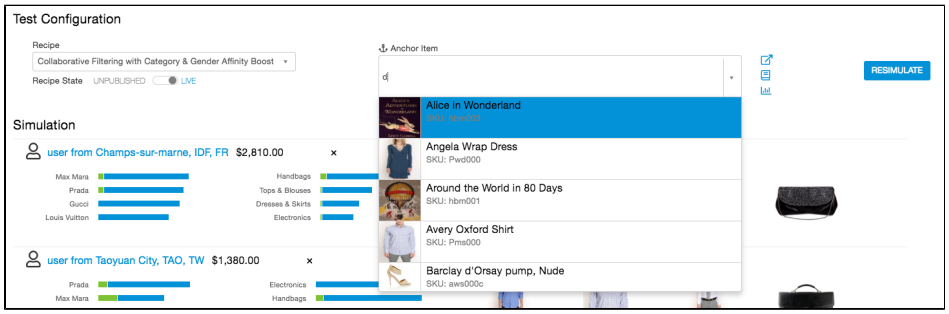
- *Specific User* - These are users who match the selected filtering criteria at that time. All filters that apply to this user will be listed below the user name. Specific Users will not update as their behaviors change. This means if you filtered by non-buyers and one of the specific users you selected later made a purchase, that user would still appear in the test group even though s/he no longer fits the filter criteria
- *Random User* - The Random User is always linked to a randomly chosen user that matches the filter criteria selected when the user was added to the test group. Each time the screen is refreshed, Evergage will automatically replace that user with a new user who matches the selected filter criteria. This means that a Random User always reflects the filter criteria you chose when the user was added to the test group and not a specific individual, so you may notice changes in the details, user ID, and affinities

Additional options

1. Click to remove a visitor from the group
2. Click next to **Random User** to replace that user with another *Random User* that matches the filter criteria
3. Click **SAVE** to save any changes

Test Configuration

In the *Test Configuration* section, the initial selected recipe is the one you had open when you clicked **SIMULATE**, but you can test additional recipes without having to leave this screen. You can also select an anchor item.



1. Select the **Recipe** you want to test if you want to test with another recipe
2. Select the **Recipe State**, if available. *Unpublished* will include any unpublished changes and *Live* will be the live version of the recipe. If the recipe has never been published (live), this option will be disabled
3. Choose an **Anchor Item**, if your recipe requires an anchor item. If you do not select an anchor item and your recipe requires one, no recommendations will appear in the *Simulation* section.
4. Click to open a new browser tab with the selected item on your website
5. Click to open a new browser tab with the item open for editing in the *Evergage Catalog*
6. Click to see the *Product Detail Page* in Evergage that includes product statistics
7. Click **RESIMULATE** to update the recommendations shown in *Simulation* results if you change the recipe components (ingredients, exclusions, boosters, or variations). However, if you change the selected recipe, anchor item, or the recipe

state, the *Simulation* results will automatically update

Simulation

The user details and recipe results (recommendations) will appear in the *Simulation* section below *Test Configuration*. These update automatically when you make any change, click **RESIMULATE**, reload the page, or when you load a test group with at least one user.

1. Click the full or partial user ID to view the *Unified Customer Profile* screen for the user
2. Click **$** to see a scrolling list of the items from the user's purchase history. Hover on an item for additional options detailed in step 6 below (, ,). This will be $0 without hover options if the user has not made a purchase
3. Click to see the current contents of the user's shopping cart. This icon is hidden if nothing is currently in the user's cart. Hover on an item for additional options detailed in step 6 below (, ,)
4. User affinities will appear below each user. Green represents purchase data and blue represents visit data. Hover for a tool tip with additional details
5. Audience attributes will appear below each user:
    1. *Random User* - attributes will always match the filters you set in the audience filtering section
    2. *Specific User* - attributes will reflect the user's current behavior
6. Click a recommended item image to see additional options
    1. - open a new browser tab with the selected item on your website
    2. - open a new browser tab with the item open for editing in the *Evergage Catalog*
    3. - (visible for products only) to see the *Product Detail Page* in Evergage that includes product statistics
    4. - to make the item the anchor item