

# Add Exclusions to a Recipe



With Exclusions, you can add additional filtering criteria to your recipes. For example, you can configure an exclusion to show only other items from the same category as the item being viewed. This means that a visitor viewing hats would only see recommendations for other hats and not other frequently viewed or purchased items even from the same brand. Additionally, you can incorporate [Variations](#) to further refine or expand the recommendation results shown to each visitor.

## This Article Explains

This article provides an overview of the process for adding exclusions at the recipe-level. For information about adding exclusions at the message-level, please see [Create a Recommendations Campaign](#). Also, please refer to related articles for information on [creating recipes](#), and adding [ingredients](#), [boosters](#), and [variations](#).


## Sections in this Article

- [Create an Exclusion](#)
- [Exclusion Descriptions and Configurations](#)

## 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.

## Create an Exclusion

1. Create a new recipe or edit an existing recipe
2. On the *Exclusions* tab, click **Add an exclusion** to select the exclusion from the drop down; scroll to see all options
3. Adjust configurations for the exclusion as needed
4. Add additional exclusions as needed
5. Click  to delete an exclusion
6. Click **SAVE** to save your recipe

Your recipe must have a unique name and at least one ingredient before you can save it

**Edit Recipe** Recommendation Type: Product UNPUBLISHED

Name: Exclusion Recipe **SAVE** **CLOSE**

INGREDIENTS 1 | **EXCLUSIONS 0** | BOOSTERS 0 | VARIATIONS 0

There are no exclusions.

Add exclusion

- Product
- Products
- Category
- Department
- Purchased

Products with category  
Products with department  
Purchased purchased Products

This recipe has completed training. After testing, you can publish this version or make more changes and retrain. **PUBLISH**

**Test Recipe Using Test Groups** **CREATE TEST GROUP**

Test Group Actions

Sample Test Group **SIMULATE**

**Introducing Recipe Test Groups!**

**What are test groups?**  
Test Groups are saved groups of users selected by user name, ID, email, or using advanced audience filtering. They allow you to create a simulation of the recommendations that would be displayed to a selection of users. You can quickly build your test groups by filtering users by critical filters such as LTV, lifecycle, tenure and affinities. You can also return to these simulations in the future to test new recipes and updates.

To test a recipe, click **SIMULATE** next to a test group. There is a sample test group already configured with sample users. On the Test Group screen, in the Simulation section, you can see the recommendations that the configured recipe will return for the selected sample users. Click Create new test group to define a new test group.

**Enhanced user details**

1. User purchase history
2. User's current cart contents
3. User affinities
4. Product details

For more information and detailed instructions, refer to the "Test a Recommendations Recipe" article in the Evergage Knowledge Base.

## Exclusion Descriptions and Configurations

The list below includes the pre-configured exclusions available in Evergage. In addition to those exclusions listed below, you can [create custom dimensions](#) in your [Evergage Catalog](#) that you can include or exclude in recommendation recipes. Since catalog dimensions are completely configurable, if you remove or change a pre-configured dimension that is tied to an exclusion listed below, the exclusion may not appear as a selection on the Exclusions tab. Additionally, you can create an exclusion based on any custom dimension you create in your Evergage Catalog; the list below includes only pre-configured exclusions.

E x c l u s i o n	Description	Configurations	Usa ble Whi le Rec om men din g...
Pr o d u c t	<p>Specific products to show or not show based on what is in the cart or in a static list.</p> <p>For example, if a visitor had a pair of Gucci Loafers size 11 in the cart, those exact loafers would not show in recommendation results.</p>	<p><i>Exclude or Include</i></p> <ul style="list-style-type: none"> <li>• <i>Being viewed</i> - items currently being viewed by the visitor</li> <li>• <i>In cart</i> - these are items already within the visitor's cart</li> <li>• <i>From explicit selection</i> - manual exclusion or inclusion of specific items. Enter the name of the product and press [Enter]</li> <li>• <i>Last Purchased</i> - these are products from the visitor's last purchase</li> </ul>	Pro d u c t s
Ar t i c l e	<p>Articles to show or not show based on a specific attribute value or a static list.</p> <p>For example, if a visitor comments on an article, Evergage could save the ID of this article to a custom attribute called "Most recently commented." Once you configure the article exclusion to exclude all articles with the custom attribute "Most recently commented," the visitor will not see the article he most recently commented on.</p>	<p><i>Exclude or Include</i></p> <ul style="list-style-type: none"> <li>• <i>User Attribute</i> - The value of the selected attribute</li> <li>• <i>In static list</i> - manual exclusion or inclusion of specific items. Enter the name of the product and press [Enter]</li> </ul>	Arti c l e s
C a t e g o r y	<p>Items that share the same category as the item being viewed, in cart, or in static list (e.g. Men's shoes, Women's handbags, Children's shoes).</p> <p>This can be applied to the product listing page (i.e. "Girls' Jeans" which only includes the jeans category), the product detail page (i.e. "The Simone Jean"), or any other category listing page (i.e. "Girls' Pants" which includes leggings, joggers, jeans, etc.).</p>	<p><i>Exclude or Include</i></p> <ul style="list-style-type: none"> <li>• <i>Being viewed</i> - items currently being viewed by the visitor</li> <li>• <i>In cart</i> - these are items already within the visitor's cart</li> <li>• <i>From explicit selection</i> - manual exclusion or inclusion of specific items. Enter the name of the product and press [Enter]</li> <li>• <i>In static list</i> - manual exclusion or inclusion of specific items. Enter the name of the product and press [Enter]</li> </ul> <p><i>Also exclude or include child categories</i> - The exclusion/inclusion can also be applied to items in child categories of the associated category. For example, with this option selected, an "include category being viewed" inclusion will show items with the category "Men's Shoes Sneakers" when viewing the category "Men's Shoes."</p>	Pro d u c t s, Arti c l e s, B l o g s , C a t e g o r i e s
D e p a r t m e n t	<p>Items that share the same department as the item being viewed, in cart, or in static list (e.g. Housewares, Accessories, Mens).</p> <p>For example, instead of the category "Mens   Shoes" being excluded (or included), anything categorized as "Mens" would be excluded (or included). Departments are created at the category level:</p> <ol style="list-style-type: none"> <li>1. In Evergage, select <b>Catalog &gt; Categories</b></li> <li>2. Select the item you want to elevate to department</li> <li>3. Click <b>Edit</b></li> <li>4. In the <i>Attributes</i> section, select <b>Is Department</b></li> <li>5. Click <b>Save</b></li> </ol> <p>Each lineage of categories may only be associated with one department. For example, if you have a category structure that includes: Mens   Shoes   Loafers, Mens   Shoes   Boots, and Mens   Shoes   Lace-ups and you want to select Mens   Shoes   Boots as the department, you cannot create departments for loafers and lace-ups</p>	<p><i>Exclude or Include</i></p> <ul style="list-style-type: none"> <li>• <i>Being viewed</i> - items currently being viewed by the visitor</li> <li>• <i>In cart</i> - these are items already within the visitor's cart</li> <li>• <i>In static list</i> - manual exclusion or inclusion of specific items. Enter the name of the product and press [Enter]</li> </ul>	Pro d u c t s, Arti c l e s, B l o g s
P u r c h a s e d	<p>Filter by items previously purchased by the visitor</p>	<p><i>Exclude or Include selected option purchased in the past specified number of days</i></p> <ul style="list-style-type: none"> <li>• <i>Product</i></li> <li>• <i>Category</i></li> <li>• <i>Brand</i></li> <li>• <i>Class</i></li> <li>• <i>Gender</i></li> <li>• <i>Style</i></li> <li>• <i>Size</i></li> <li>• <i>Keyword</i></li> </ul>	Pro d u c t s

Pri ce	Filter by an item price range related to the product being viewed or a set price or price range	<p><i>Exclude</i> or <i>Include</i> selected <i>option</i> based on</p> <ul style="list-style-type: none"> <li>• <i>Numeric</i> with a price <ul style="list-style-type: none"> <li>• <i>Greater than specified</i> amount</li> <li>• <i>Less than specified amount</i></li> <li>• <i>Between specified amounts</i></li> </ul> </li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• <i>Percentage</i> with a price <ul style="list-style-type: none"> <li>• <i>Less than specified</i>% of the price of the item being viewed</li> <li>• <i>Greater than specified % of the price of the item being viewed</i></li> </ul> </li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• <i>User's current cart value</i> <ul style="list-style-type: none"> <li>• <i>Specify the target cart value, and only items worth more than (target value - total amount in user's cart) will be included or excluded</i></li> <li>• <i>If user doesn't have an open cart, this exclusion/inclusion will not apply</i></li> </ul> </li> </ul>	Pro du ct
In ve nt or y C ou nt	Filter items with an inventory count above, less than, or between selected values	<i>Exclude</i> or <i>Include</i> items with an inventory count in the <i>specified</i> range	Pro du ct
Vi e w ed	Filter by items previously viewed by the visitor	<p><i>Exclude</i> or <i>Include</i> selected <i>option</i> viewed in the past <i>specified</i> number of days viewed for at least the <i>specified</i> number of seconds</p> <ul style="list-style-type: none"> <li>• <i>Product</i></li> <li>• <i>Category</i></li> <li>• <i>Brand</i></li> <li>• <i>Class</i></li> <li>• <i>Gender</i></li> <li>• <i>Style</i></li> <li>• <i>Size</i></li> <li>• <i>Keyword</i></li> </ul>	All
Fa vo rit ed	Filter by items previously favorited by the visitor	<p><i>Exclude</i> or <i>Include</i> selected <i>option</i> favorited in the past <i>specified</i> number of days</p> <ul style="list-style-type: none"> <li>• <i>Product</i></li> <li>• <i>Category</i></li> <li>• <i>Brand</i></li> <li>• <i>Class</i></li> <li>• <i>Gender</i></li> <li>• <i>Style</i></li> <li>• <i>Size</i></li> <li>• <i>Keyword</i></li> </ul>	All
R ec o m m en ded	Filter by items previously recommended to the user	<i>Exclude</i> or <i>Include</i> item type being recommended a <i>specified</i> number of times in the past <i>specified</i> number of days	Pro du cts, Arti cles, and Blogs
R ati ng	Filter items with an average rating above, less than, or between selected values.	<p><i>Exclude</i> or <i>Include</i></p> <ul style="list-style-type: none"> <li>• Items within specified rating score</li> <li>• Option for item to be part of exclusion or inclusion if the score is null or zero</li> </ul>	All

Compatibility	<p>Restrict tags or categories compatible or incompatible with the current anchor items.</p> <p>For example, as an <b>exclusion</b>: if brand1 is marked as incompatible with brand2, and brand1 is an anchor item, nothing from brand2 will be served.</p> <p>Conversely, as an <b>inclusion</b>: if brand1 is marked compatible with brand2, and brand1 is the anchor item, only items from brand2 will be served.</p> <p>Tags and categories must be explicitly declared as "compatible" or "incompatible" with one another through the item relationship screen. Like <a href="#">SmartBundle</a> relationships, Compatible/Incompatible relationship linking is two-way, and must be configured through the items screen for individual categories or tags.</p>	<p><i>Exclude or Include</i> items explicitly marked <i>incompatible</i> or <i>compatible</i> with the <i>specified</i> anchor item</p> <ul style="list-style-type: none"> <li>• <i>Product</i></li> <li>• <i>Category</i></li> <li>• <i>Brand</i></li> <li>• <i>Class</i></li> <li>• <i>Gender</i></li> <li>• <i>Style</i></li> <li>• <i>Size</i></li> <li>• <i>Keyword</i></li> <li>• <i>Product List</i></li> <li>• <i>Author</i></li> <li>• <i>Content Class</i></li> </ul>	Products, Articles, Blogs
Location	<p>Filter by distance to the item being viewed.</p> <p>For example, show items (like a restaurant or an item only sold in specific stores) within 5 miles of the item being viewed.</p>	<p><i>Exclude or Include</i> items within <i>specified</i> miles of <i>item</i> or <i>user</i></p>	All
Badge	<p>Filter by item badge</p>	<p><i>Exclude or Include</i></p> <ul style="list-style-type: none"> <li>• <i>Being viewed</i> - items currently being viewed by the visitor</li> <li>• <i>In cart</i> - these are items already within the visitor's cart</li> <li>• <i>From explicit selection</i> - manual exclusion or inclusion of specific items. Enter the name of the product and press <b>[Enter]</b></li> <li>• <i>Last Purchased</i> - these are products from the visitor's last purchase</li> </ul>	Products, Badges
Gender	<p>Filter by the item gender (e.g. Mens, Womens, Girls, Boys)</p>	<p><i>Exclude or Include</i></p> <ul style="list-style-type: none"> <li>• <i>Being viewed</i> - items currently being viewed by the visitor</li> <li>• <i>In cart</i> - these are items already within the visitor's cart</li> <li>• <i>From explicit selection</i> - manual exclusion or inclusion of specific items. Enter the name of the product and press <b>[Enter]</b></li> <li>• <i>In static list</i> - manual exclusion or inclusion of specific items. Enter the name of the product and press <b>[Enter]</b></li> </ul>	Products, Genders
Class	<p>Filter by the item classes</p>	<p><i>Exclude or Include</i></p> <ul style="list-style-type: none"> <li>• <i>Being viewed</i> - items currently being viewed by the visitor</li> <li>• <i>In cart</i> - these are items already within the visitor's cart</li> <li>• <i>From explicit selection</i> - manual exclusion or inclusion of specific items. Enter the name of the product and press <b>[Enter]</b></li> <li>• <i>Last Purchased</i> - these are products from the visitor's last purchase</li> </ul>	Products, Item Classes
Blog	<p>Blogs to show or not show based on a specific attribute value or a static list.</p> <p>For example, if a visitor comments on a blog, Evergage could save the ID of this blog to a custom attribute called "Most recently commented." Once you configure the blog exclusion to exclude all blogs with the custom attribute "Most recently commented," the visitor will not see the blog he most recently commented on.</p>	<p><i>Exclude or Include</i></p> <ul style="list-style-type: none"> <li>• <i>User Attribute</i> - The value of the selected attribute</li> <li>• <i>In static list</i> - manual exclusion or inclusion of specific items. Enter the name of the product and press <b>[Enter]</b></li> </ul>	Blogs
Keyword	<p>Filter by the item keywords</p>	<p><i>Exclude or Include</i></p> <ul style="list-style-type: none"> <li>• <i>Being viewed</i> - items currently being viewed by the visitor</li> <li>• <i>In cart</i> - these are items already within the visitor's cart</li> <li>• <i>From explicit selection</i> - manual exclusion or inclusion of specific items. Enter the name of the product and press <b>[Enter]</b></li> <li>• <i>Last Purchased</i> - these are products from the visitor's last purchase</li> </ul>	Products, Articles, Blogs, Keywords
Product List	<p>Filter by the <a href="#">static product list</a> the item is part of</p>	<p><i>Exclude or Include</i></p> <ul style="list-style-type: none"> <li>• <i>Being viewed</i> - items currently being viewed by the visitor</li> <li>• <i>In cart</i> - these are items already within the visitor's cart</li> <li>• <i>Last Purchased</i> - these are products from the visitor's last purchase</li> <li>• <i>From explicit selection</i> - manual exclusion or inclusion of specific items. Enter the name of the product and press <b>[Enter]</b></li> <li>• <i>From user attribute</i> - exclusion or inclusion based on selected user attribute (including survey questions)</li> </ul>	Products

Author	Filter by the author	<p><i>Exclude or Include</i></p> <ul style="list-style-type: none"> <li>• <i>Being viewed</i> - items currently being viewed by the visitor</li> <li>• <i>From explicit selection</i> - manual exclusion or inclusion of specific items. Enter the name of the product and press [Enter]</li> </ul>	Articles, Blogs, Authors
Content Class	Filter by the content class	<p><i>Exclude or Include</i></p> <ul style="list-style-type: none"> <li>• <i>Being viewed</i> - items currently being viewed by the visitor</li> <li>• <i>From explicit selection</i> - manual exclusion or inclusion of specific items. Enter the name of the product and press [Enter]</li> </ul>	Articles, Blogs, Content Classes