

Understand SmartBundle



New Name: Marketing Cloud Personalization

Interaction Studio (formerly Evergage) is now known as Marketing Cloud Personalization. The new name reflects our mission and vision for innovation in Salesforce Marketing Cloud. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in various places until we replace it.



Interaction Studio SmartBundle is a component of [Einstein Recipes](#). Relying on a designated group of categories which are often purchased as part of a same basket, it suggests products purchased in the same order as the selected anchor item(s). For example, "Shoes" and "Dresses" may be bought in the same cart because items from those categories may work well together. If they are, when a customer is viewing a shoe, she will be recommended the dress that is bought the most with the shoe she is viewing. SmartBundle relies on customer purchase behavior to recommend the most appropriate products and complete the cart.

This Article Explains

This article details the process of working with SmartBundles to enhance the purchase experience.

Sections in this Article

- [Create Category Relationships](#)
- [Configure SmartBundle Recipes](#)
- [View SmartBundle Data](#)



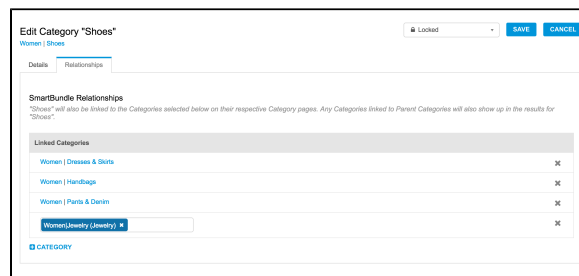
There are several steps to setting up a SmartBundle recipe, and it is important to keep in mind that SmartBundle only works with datasets where end users can purchase multiple products in the same order. An important distinction between SmartBundle and CoBuy is that SmartBundle ingredients only consider items in the same cart. CoBuy considers all items bought by the same end user over the look-back period.

Create Category Relationships

Creating a relationship between two categories links them to designate which items should be bought and recommended together. Before you begin creating relationships between categories it is important to understand:

- **Linking a category is two way.** For example, in the image below "Women|Shoes" is linked to "Women|Dresses & Skirts" as well as three other categories. If you edit each of these four linked categories, you will see that they are already linked to "Women|Shoes", but not linked to each other unless the relationship was already defined for those categories (so "Women|Handbags" will not be linked to "Women|Dresses & Skirts" unless that relationship is also created).
- **You cannot link a category to its own parent category.** For example, you cannot link "Women|Shoes" to "Women" because "Shoes" are already contained within the parent category "Women". However, you can link two parent categories together. For example, linking "Women" and "Accessories" will result in broad recommendations of items from both "Women" and "Accessories" when an item in either category is selected.

1. Log into *Interaction Studio* as an administrator
2. Select **CATALOG**
3. Select **Categories**
4. On the *Categories* tab, select a category and click **EDIT CATEGORY**
5. On the *Relationships* tab, click **CATEGORY** to create new relationship

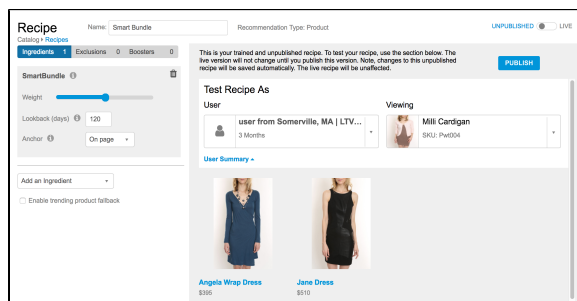


Configure SmartBundle Recipes

Once the relationships are designated, the ingredient can start returning results. SmartBundle is similar to the CoBuy or CoBrowse ingredients as it also relies on an anchor item (either in cart or on the page), requires training, and utilizes a look-back period. SmartBundle also has a category inclusion built-in so any items belonging to categories in relationships with other categories will automatically be included.

1. Create a new [Einstein Recipe](#)
2. Add the SmartBundle [ingredient](#) to the recipe
3. [Train](#) the recipe
4. [Test](#) the recipe with any item in a category that has a specified relationship. If items from two linked categories are

- bought together in the same cart, the recommendations will return the exact items frequently bought together across categories
- When you confirm that the results are as expected, [publish](#) the recipe



View SmartBundle Data

Since SmartBundle is a campaign built in Interaction Studio, you can view data around the success of using SmartBundles in [Campaign Statistics](#). You can [A/B test](#) a SmartBundle campaign to see the lift versus control.

View Campaign Statistics

- Log into *Interaction Studio*
- Select **CAMPAIGNS**
- Select your campaign
- Click **STATISTICS**

