

saving time & solving for scale:

Global Levers, Cloning Configurations, & More





Your July 2023 Best Practice Session Hosts

Digital Experience Strategy & Management



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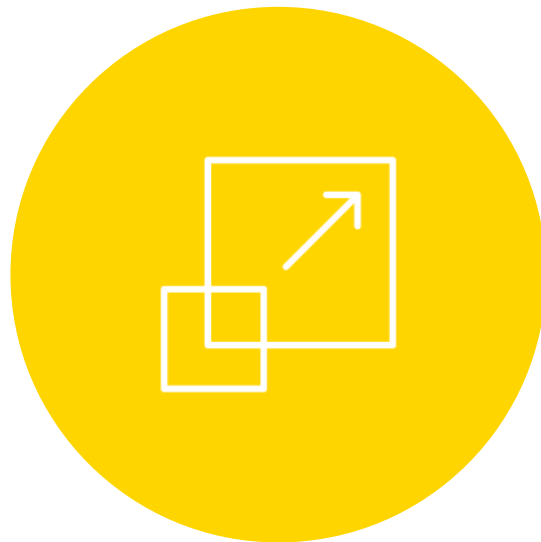
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What You'll Hear Today

1. **NEW: Cloning Configurations**
Copying rules at scale across sites
2. **NEW: Customizable Product Card Attributes**
See product attributes and performance metrics all in one-view
3. **NEW: Curated Pages**
Use Sequential Lock to manually place products on a page
4. **Facet Inheritance Manager**
5. **Global Rules**

Saving Time & Solving for Scale





Building for Merchandisers: Achieve more with limitless merchandising capabilities





Cloning Configurations

Save time with bulk copying of rules

Create rules in one site and copy them to another site with a user-friendly interface directly in the dashboard.

Key Benefits:

- ✓ Improve workflow efficiencies with automation
- ✓ Reduce risk of error through compare & preview



✓ Generally Available



Cloning Configurations

Save time with bulk copying of rules

What can you do today?

- ✓ Copy rules between sites within the same realm (i.e. between sites in staging realm or between sites in production realm)
- ✓ Preview changes before going live
- ✓ Rollback changes from a pre-copy state

What's coming up next?

- ✓ Clone rules between staging and production

The screenshot shows the 'Configuration cloning wizard' interface. On the left, a vertical progress bar has four steps: 1. Select source site, 2. Select configurations, 3. Review associated data changes, and 4. Clone review (which is currently selected and highlighted with a blue circle). The main content area is titled 'Clone review' and contains the following sections:

- Cloning path:** Shows 'Current target site: pacifichome.com.en.store1' and 'Source site: pacifichome.com.en.store3' with a left-pointing arrow between them.
- Selected configurations:** A list of configurations to be cloned, including 'Site search - Ranking (382 rules)', 'Category ranking (# rules)', 'Global ranking rule (# rules)', 'Global category ranking rule (# rules)', 'Global search ranking rule (# rules)', 'Site search - Facets (# rules)', 'Category facets (# rules)', 'Global facet rules (# rules)', and 'Category facet inheritance settings (# rules)'. To the right of this list, another set of configurations is shown: 'Site search - Redirects (# rules)', 'Site search - Autosuggest blacklist (# rules)', 'Assets/Promo/Banners/Campaign rules (# rules)', 'Audiences/Targeting rules (# rules)', 'Synonyms (# rules)', and 'Recommendation ranking rule, Global (# rules)'.
- Attention!** A warning icon followed by a checkbox that is checked. The text reads: 'I understand the selected configurations of current target site will be deleted and be replaced by selected configs from the source site. This action is not reversible (required)'.
- Buttons:** At the bottom, there are four buttons: 'Start clone (~1.2hrs)' (blue), 'Schedule for later' (blue with a clock icon), 'Back' (white), and 'Cancel' (white).



Cloning Configurations

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What's coming up next?

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Real Customer Example:

- ✓ Support account migration for new sites with different account setup (without having to manually repeat X years worth of configurations)
- ✓ Speeding up new site onboarding with customer's unique facet customizations



Cloning Configurations

Save time with bulk copying of rules

What rules are included today?

Ranking Configurations

- ✓ Site Search – Ranking
- ✓ Category Ranking
- ✓ Global Ranking Rule
- ✓ Global Category Ranking Rule
- ✓ Global Search Ranking Rule

Facet Configurations

- ✓ Site Search – Facets
- ✓ Category Facets
- ✓ Global Facet rules

Other Configurations

- ✓ Site Search – Redirects
- ✓ Site Search – Synonyms



Cloning Configurations

Save time with bulk copying of rules

Where can you find Cloning Configurations?

After selecting target site or account, go to **Setup > brSM Global Configurations > Cloning configurations**

Setup > brSM global configurations > Cloning configurations

Cloning configurations

Cloning configurations (ranking rules, facet rules, synonyms...etc) from site to site within an account or across different accounts in your organization. If you like to clone account level configurations. Please operate from the account level. [Documentation](#)

Configuration cloning wizard

Current account: homeoasis.bloomreach.com

[Start clone setup](#)

Selected configuration type(s) of this current target destination site will be deleted and replaced by the configurations from the selected source site.

Before you start

- We strongly recommend you ensure the feed (product catalog) between the target and source accounts is up to date before you start the cloning process. Visit [DevStudio](#)
- The cloning process once started and completed, is not reversible.
- You are currently on the target account which will receive configurations from a source account. You must have read or read/write access of the source account.



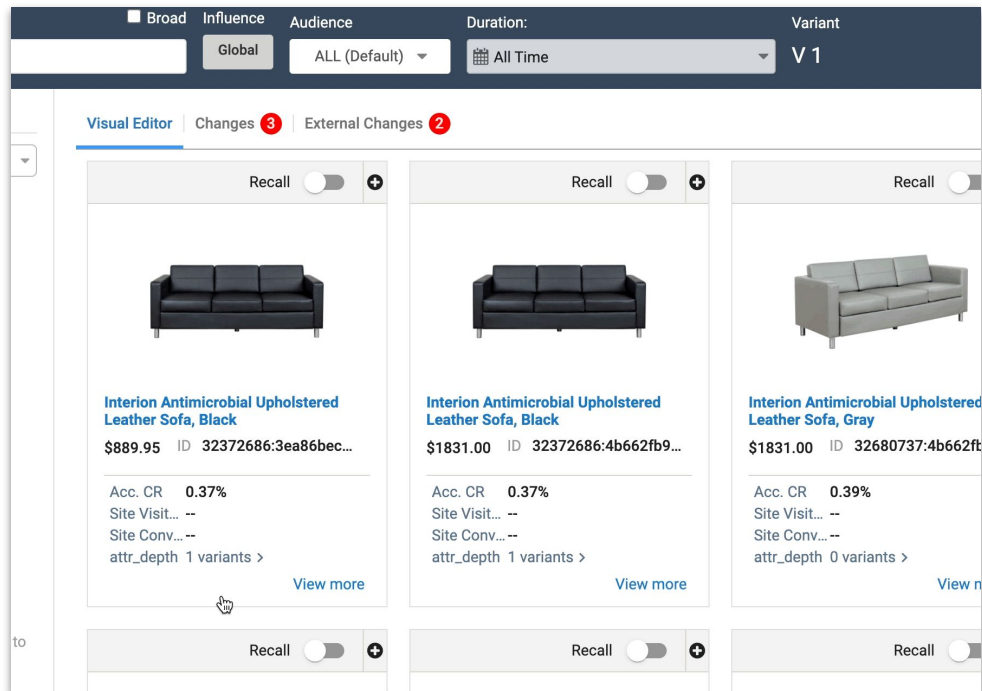
Customizable Product Card Attributes

Increase efficiencies with more data in the Visual Editor

Customize the attributes and metrics that appear on each product card within the Visual Editor.

Key Benefits:

- ✓ Increased flexibility/visibility with an all-in-one view Visual Editor
- ✓ Enable better data-driven merchandising with product performance data

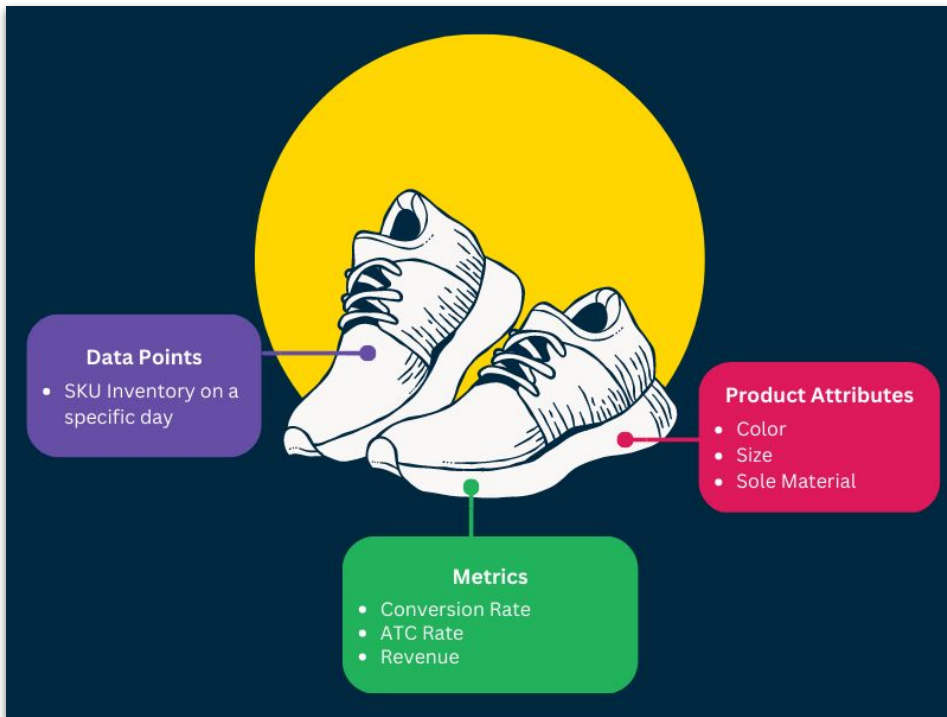


✓ Generally Available



Customizable Product Card Attributes

Increase efficiencies with more data in the Visual Editor



Customizable Product Card Attributes

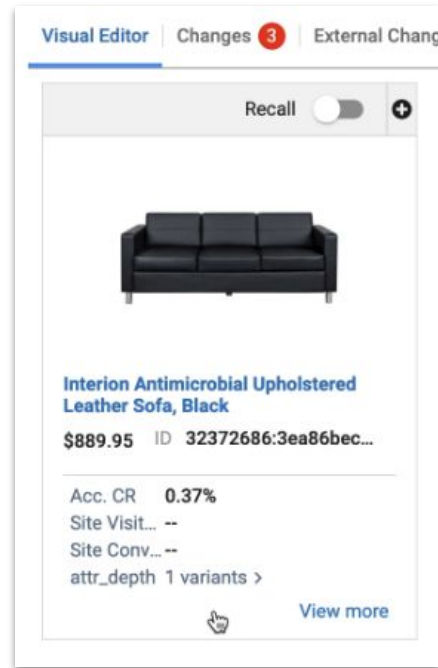
Increase efficiencies with more data in the Visual Editor

What can you do today?

- ✓ Customize what you see on the product cards.
Choose from:
 - Attributes (Brand, color, etc)
 - Metrics (CR, ATC, Revenue)
 - SKU-level data (i.e. inventory)
- ✓ Customize at the global level or at the query level

What's coming up next?

- ✓ More SKU-level support



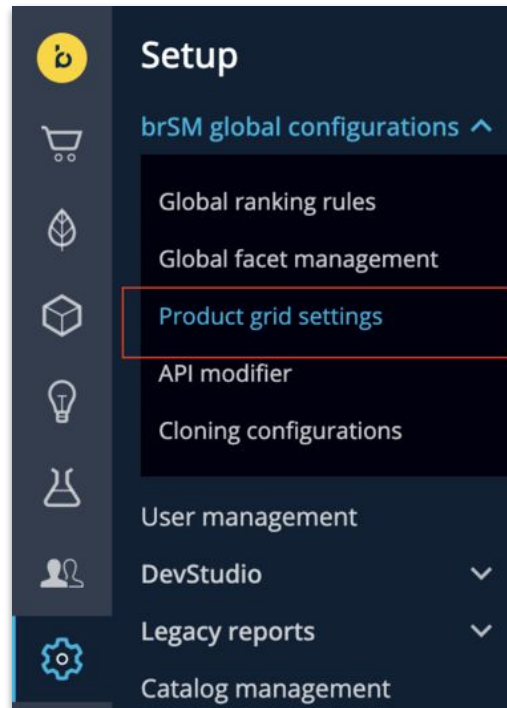
Customizable Product Card Attributes

Increase efficiencies with more data in the Visual Editor

Where can you find Customizable Product Card Attributes?

For editing cards at the global level:

- Choose what level you would like to make the change (account, site group, or site level)
- **Setup → brSM global configurations → Product grid settings**





Customizable Product Card Attributes

Increase efficiencies with more data in the Visual Editor

Where can you find Customizable Product Card Attributes?

For editing cards at the query level:

- Choose what level you would like to make the change (account, site group, or site level)
- **Search & Merchandising → Site Search → Ranking rules**

Search & Merchandising > Site search > Ranking rules pacificsupply.bloomreach.com

Search Ranking Rules

Search... Q

Add Search Ranking Rule

Identifier	Variants	Influence	Enable	Last Edited By	Actions
switch	1	Global	On	Mar 23, 2023 Bloomreach	Edit



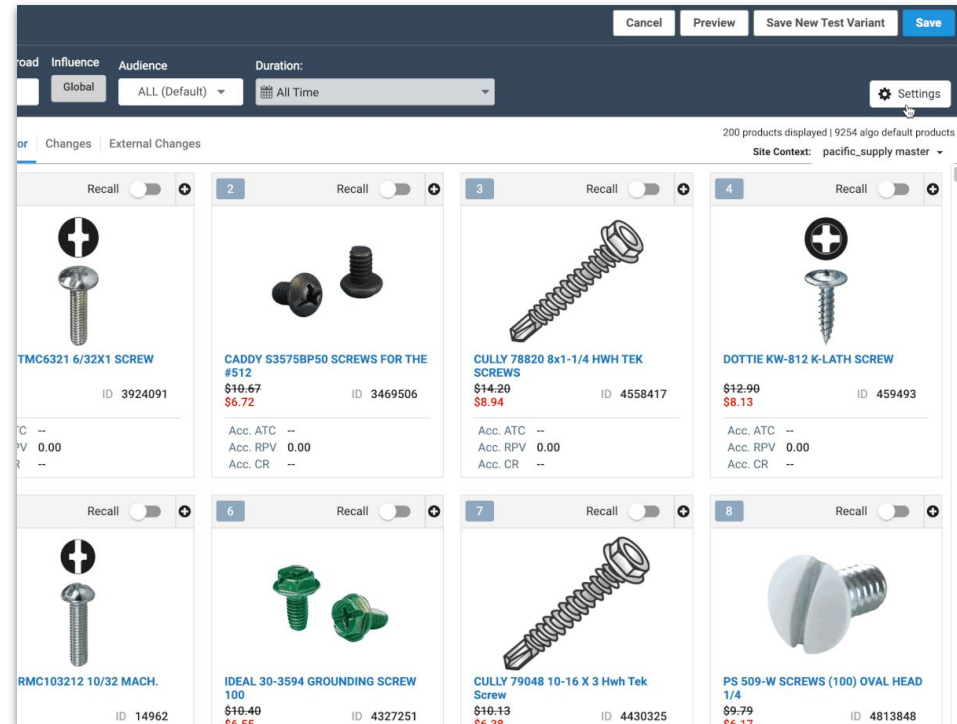
Curated Pages

Use Sequential Lock to curate pages with a specific aesthetic

Create custom category pages using Sequential Lock, with locked positions of more than 1000 products. Manually place products on a page in the order that best meets your campaign or category needs.

Key Benefits:

- ✓ Greater flexibility to customize the full look of a campaign or collection page, up to 1000+ products



✓ GA: August 10
Available by Request

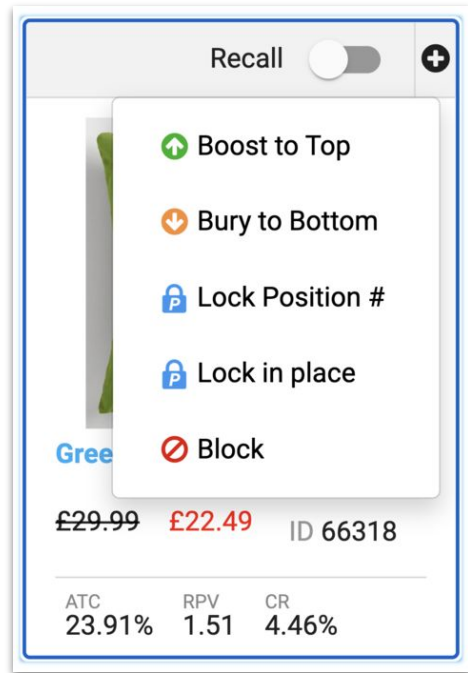


Curated Pages

Use Sequential Lock to curate pages with a specific aesthetic

What's the difference between Sequential Lock and "pinning" or "slotting" a product?

- Sequential lock must be used in sequence, with all products locked from the first slot to the number you've decided to lock.
- Pinning/slotting products can be used for individual slots at your decision, and max to slot 100
- You can only choose one or the other.





Curated Pages

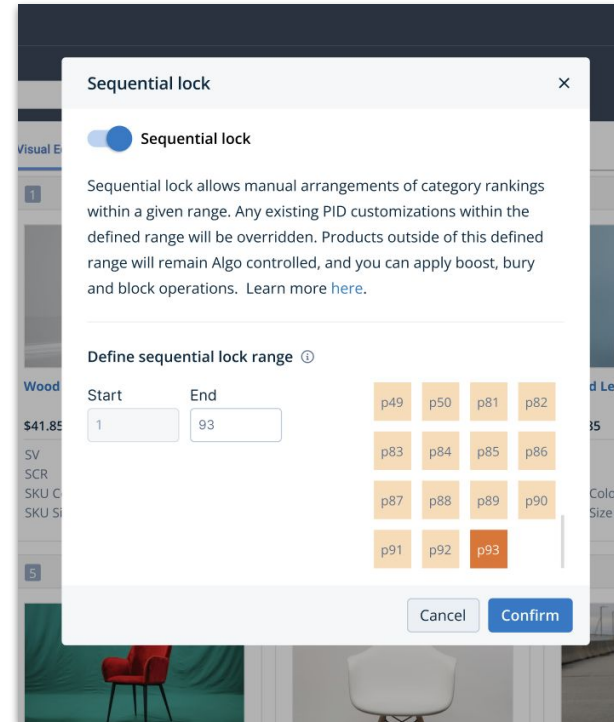
Use Sequential Lock to curate pages with a specific aesthetic

What can you do today?

- ✓ Use Sequential Lock to customize the full look of a campaign or collection page, up to 1000+ products

What's coming up next?

- ✓ Bulk upload all products required for a Curated Page using a CSV import






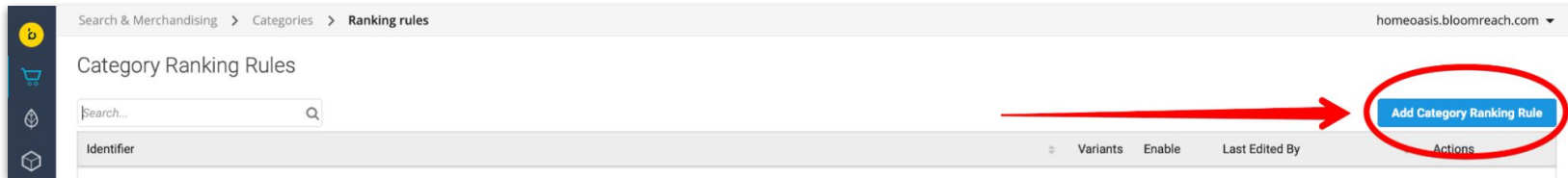
Curated Pages

Use Sequential Lock to curate pages with a specific aesthetic

Where can you find Sequential Lock?

Search & Merchandising > Categories > Ranking rules

- Enter the Category in the Search panel and hit enter/return.
- Click the  Settings button to reveal the dropdown. Click the Sequential Lock option.



Let's dive into the dashboard to ***see it in action***



Facet Inheritance: Customize Category Pages at Scale

Facet Inheritance allows merchandisers to pass on facet rules from parent to child categories, making it more efficient to manage category merchandising. Simple controls in the dashboard make it easy to pass on rules, block rules, or pass rules through to child pages.



Benefits

- Massive time saver for Merchandisers by avoiding the manual and repetitive task of merchandising each Category and Subcategory individually
- Finer grain control settings for each Category node to address your advanced Category Merchandising use cases





Details

Search & Merchandising > Categories > Facets

homeoasis.bloomreach.com

Facet Management

Facet Rules Category Inheritance Manager

Search by category name or ID

Cancel

Save

Pass Down

Receive From

Pass Through

Eye

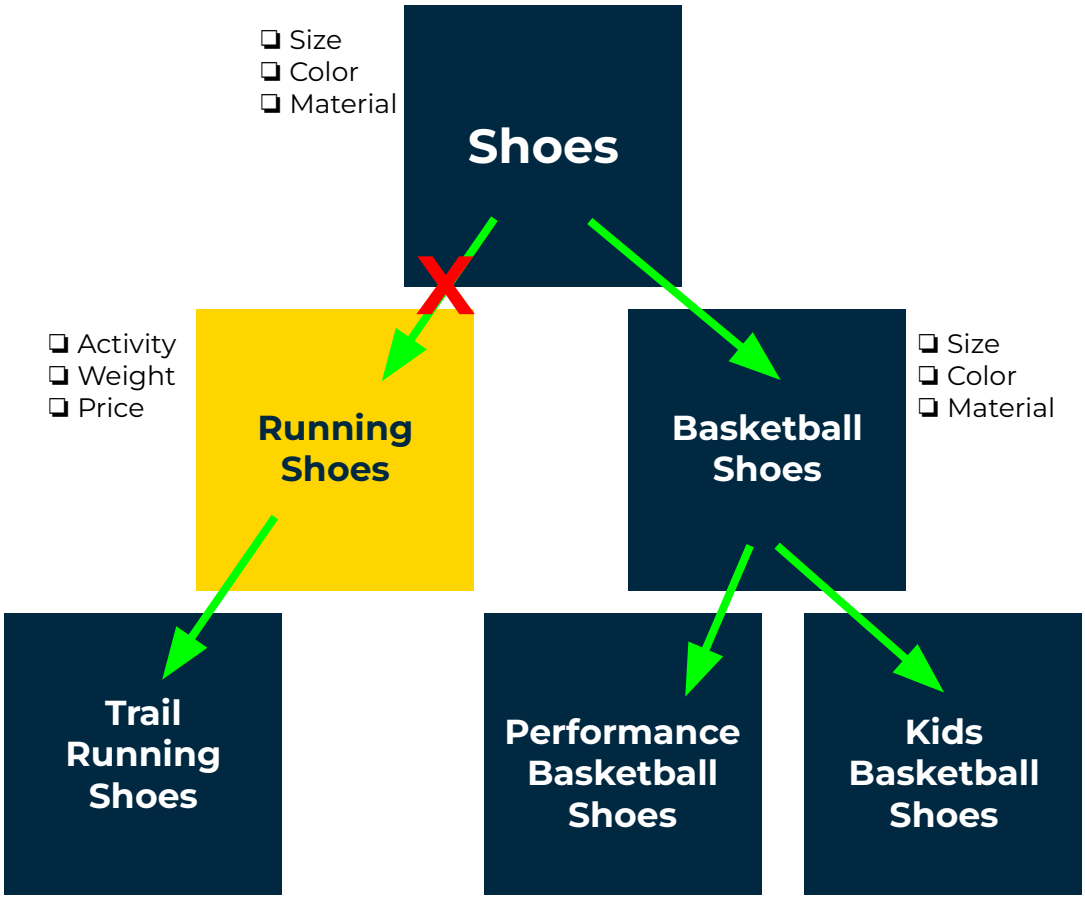
<div><div>▼</div><div><div>Bed & Bath</div><div>(17)</div></div><div><div>116729</div></div></div>	<div><div><div></div></div></div> <div><div><div></div></div></div> <div><div><div></div></div></div>
<div><div>▼</div><div><div>Bath & Body</div><div>(2)</div></div><div><div>116990</div></div></div>	<div><div><div></div></div></div> <div><div><div></div></div></div> <div><div><div></div></div></div>
<div><div></div><div><div>Soaps and Lotions</div><div>116991</div></div></div>	<div><div><div></div></div></div> <div><div><div></div></div></div> <div><div><div></div></div></div>
<div><div></div><div><div>Spa and Relaxation</div><div>116992</div></div></div>	<div><div><div></div></div></div> <div><div><div></div></div></div> <div><div><div></div></div></div>

- **Pass Down** allows a parent to pass configurations to child nodes.
- **Receive From** allows a child to receive configurations from above.
- **Pass Through** allows configurations to skip nodes and still be passed on to child nodes.



Example #1

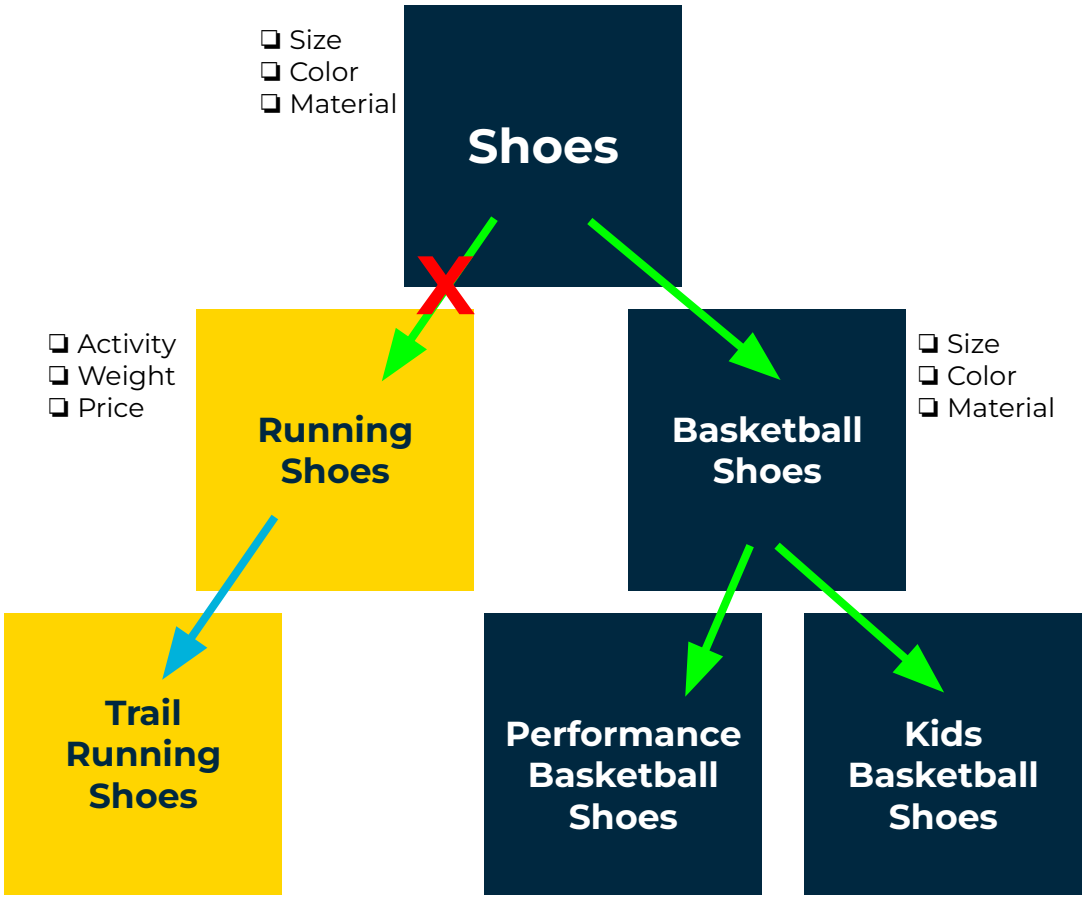
Apply facet customizations to individual subcategories without affecting the rest of the categories in that branch.





Example #2

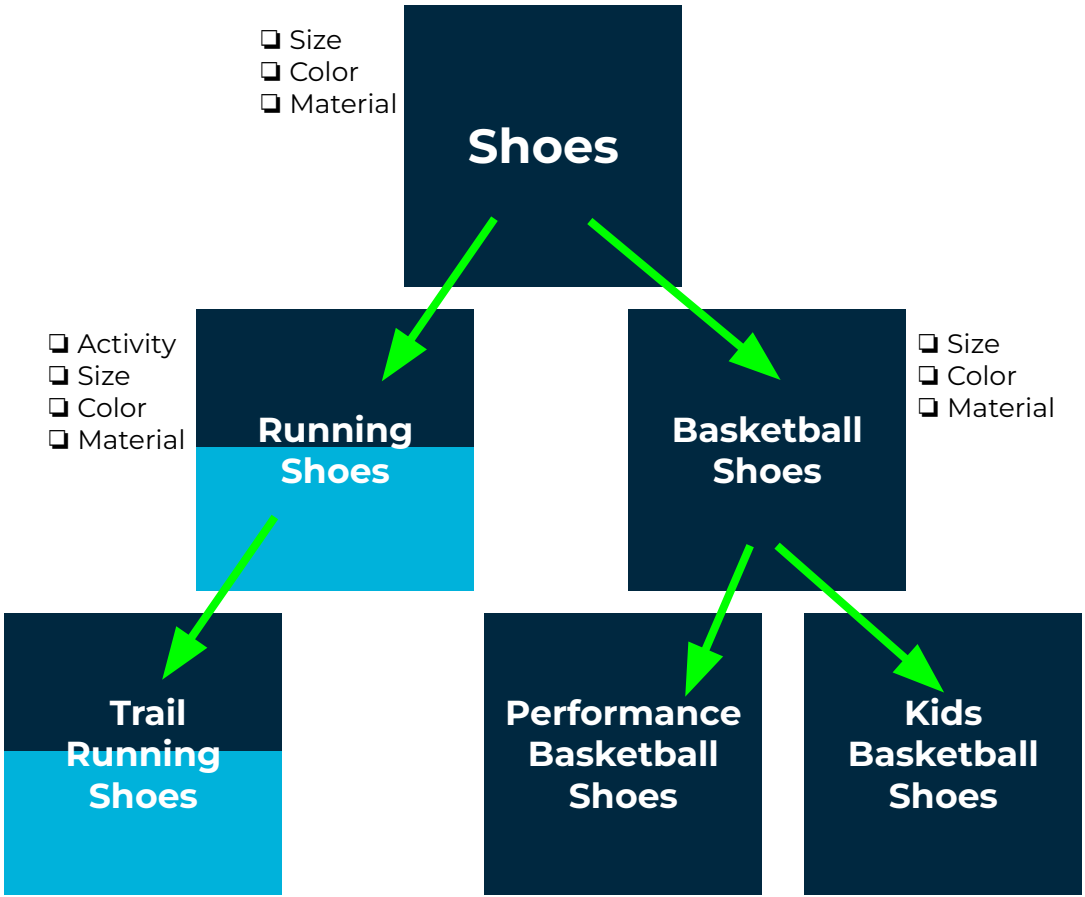
Exclude subcategories from facet customizations, with the option to include or exclude its child categories.





Example #3

Apply additional customizations and allow them to be inherited by child categories.





Global Rules

Product Grid

Cancel

Preview

Save New Test Variant

Save

Global Rule

Audience

Duration:

All Pages

ALL (Default)

All Time

Product

Attribute


Search by Keyword or Product ID

Visual Editor


Changes

External Changes


200 items displayed | 11518 algo default items



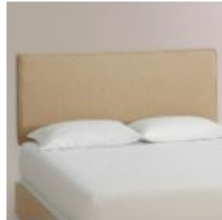
Olive Green Adirondack Chair
£129.99 £99.99 ID 6...



Surf Blue All Weather Wicker Stacking Tub Chairs
£159.98 £99.98 ID 6...



White Crochet Lori Kimono
£24.99 ID 68673



Linen Loran Upholstered Bed
£859.99 ID 40125

BLOOMREACH



Global Rules

Single Preview

Side-by-Side Preview



Search across the site to preview the rule influence

Search Term ▾

ALL (Default) ▾

*



☐ Show Changes

Preview Settings

Search Term

Category

Similar Products

Frequently Viewed Together

Frequently Bought Together

Past Purchase

Best Seller

Experience-Driven Recommendations

Trending Products

Thematic Pages



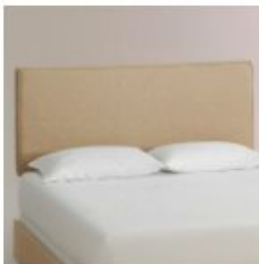
Olive Green Adirondack Chair



Surf Blue All Weather Wicker Stacking Tub Chairs Set of 2



White Crochet Lori Kimono



Linen Loran Upholstered Bed



Global Rules

Product Grid

Cancel

Preview

Save New Test Variant

Save

Global Rule

Audience

Duration:

All Pages

ALL (Default)

All Time

Product

Attribute


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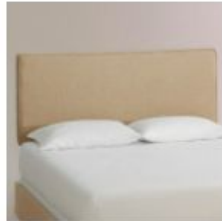
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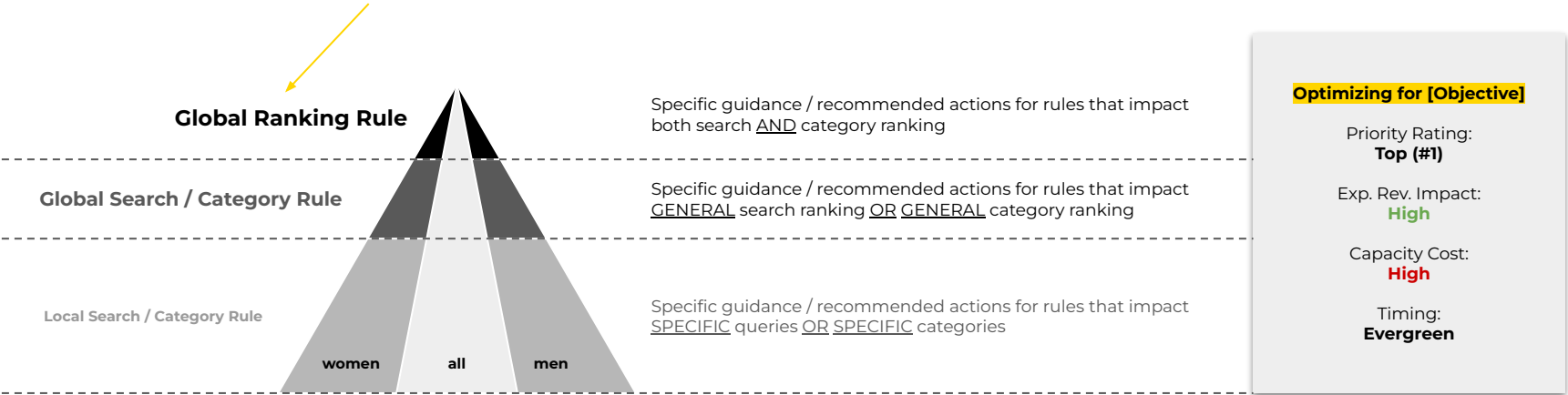
Linen Loran Upholstered Bed

£859.99 ID 40125



Global Rules & Merchandising Hierarchy

Optimal for evergreen business priorities





Thank You!



Q&A

Keep the conversation going... join the Bloomreach Slack Community!

- Stay up-to-date on all things monthly Best Practices and access resources related to our session topics by adding yourself to the **#discovery-best-practices** channel
- Network and share ideas with fellow Bloomreach customers
- Hear the latest news from Bloomreach and stay informed about industry trends

→ [Link to join](#)





Let's keep the conversation going!

1. Join the **Digital Merchandising Community** on LinkedIn
2. Invite a friend..OR two to join the community and the events
3. If you are interested in being apart of a future panel, we would love to have you join one!

