

# Understand the Unified Customer Profile Screen for E-Commerce



## 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.



The *Unified Customer Profile Screen* gives an overview of all information captured by Interaction Studio about a particular user (or account, if your company markets to businesses as well as consumers). The screen will display different types of information depending on your industry.

### This Article Explains

This article gives an overview of the information you will see on an e-commerce site for users. If you market to businesses as well, information will be shown in aggregate for the account.

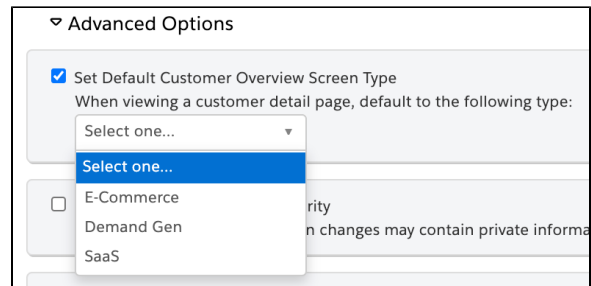
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## Set the Default Customer Profile Screen Type

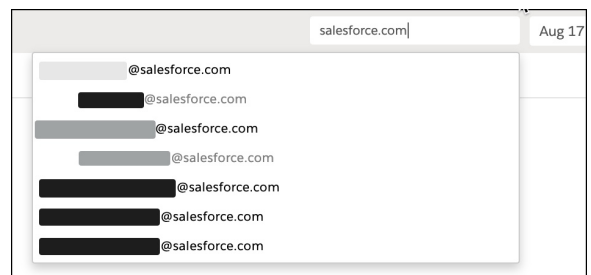
You can change the default setting for the affinities wheel so it is relevant to demand generation, SaaS/customer success, or e-commerce businesses.

1. Access *Interaction Studio*
2. From the navigation at the left, select **Settings > General Setup**
3. Expand **Advanced Options**
4. Enable **Set Default Customer Overview Screen Type**
5. Select the type as **E-Commerce**
6. Click **Save**





## Open the Screen

1. Log into *Interaction Studio*
  2. In *Search* in the upper right corner of the screen, type a partial user (or account) name, or [Interaction Studio ID](#) (i.e. 1234af2bf6cfe66) to see a list of matching users (or accounts)
- OR
3. Click **User Segments**, select a segment you'd like to explore, and click **DETAILS**
  4. Select a user (or account) and click **DETAILS** to access the *Unified Customer Profile Screen*



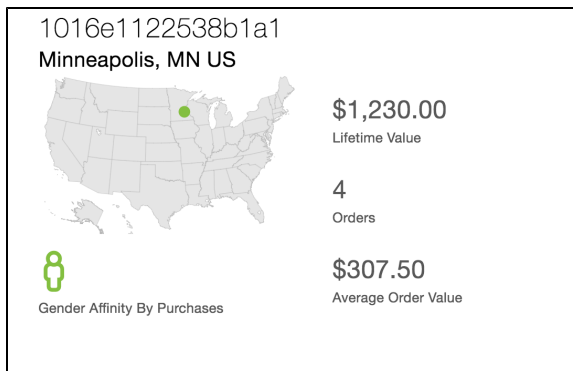
## E-Commerce User Snapshot

Located in the upper left quadrant of the screen, this section gives a quick snapshot of the user (or account) including:

- **Location**—indicated by a green circle on a map
- **Gender Affinity by Purchases**—indicated by  or  and assigned based on what user shopped for the most
- **Lifetime Value (LTV)**—total amount of purchases made for all time

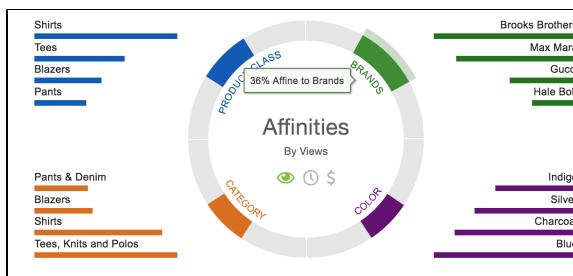
- **Number of Order**—total number of orders for all time
- **Average Order Value**—average value of orders for all time

As you scroll down the page, this section will collapse to show only user location. Scroll up to restore details



## Retail Affinities Graph

- **Affinities** are calculated based on how much a customer interacts with an item compared to other items for that item type based on the selected criteria:
  - **\$** — **By Purchases**—when selected, hover on an item in a category to see how many times it was purchased
  - **👁️** — **By Views**—when selected, hover on an item in a category to see how many times it was viewed
  - **🕒** — **By View Time**—when selected, hover on an item in a category to see the view duration
- **Example**—if a customer *looked* at Brand A products significantly more than any other brand, the customer would be affine to Brand A when the selected criteria is *By Views*. However, if the same customer *purchased* Brand B products significantly more than any other brand, the customer would be affine to Brand B when the selected criteria is *By Purchases*.
- Hover on the category to view **% Affine**. For example, this customer has a 17% affine to Brands based on purchase history
- As you scroll down the page, this graph will collapse to show summary information. Scroll up to restore details



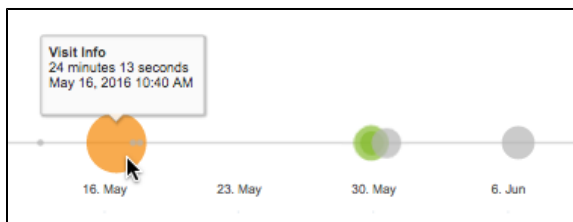
### NOTE

If an item type is not enabled the related quadrant will be grayed out

## Visit History

Located in the middle of the screen, *Visit History* maps website visits for all time.

- Hover over a visit for details about the visit, including the purchase total, if any
- Drag across the timeline to zoom in on a particular period of time
- Multiple visits on the same day will be layered
- Selected visit will be orange
- Visits without a purchase are gray
- Visits with a purchase are green



## Detail Tabs

The bottom section of the screen has six tabs that give additional detail about the user including:

- **Overview**—includes user details like the Interaction Studio User ID, location, lifetime value, and last visit as well as any saved attributes. If the user is associated with an account, click the account attribute to view the *Unified Customer Profile* for that account
- **Segment Membership**—lists the segments the user is a member of

- **Segment Compare**—details about the user as compared globally across your site and with any additional segments you add from the *Select a segment* drop down. Click to toggle between *Averages* and *Totals*
- **Actions**—lists tracked actions of the user across your site. Click the down arrow next to any column name to sort or add/remove columns
- **Event Stream**—lists all actions (page loads, clicks, and form completions), URLs clicked, campaign impressions, click throughs, and dismissals and the date completed. Select an entry to see more details
- **Affinities**—lists affinities by selected item type along with a streamgraph that shows a visual representation of the selected affinity. Select an entry in the list to see it visually represented on the graph. Click the down arrow next to any column name to sort or add/remove columns

Overview		Segment Membership	Segment Compare	Action Details	Event Stream	Affinity Details
<b>Details</b>		<b>Attributes</b>				
User ID	1016e1122538b1a1	Catalog Subscriber				+
User Name	1016e1122538b1a1	Customer Type				+
Email Address	+	Eloqua Contact Id				+
Account	-	Email Subscriber				+
LTV	\$1,230.00	External User ID				+
First Seen	Aug 4 2017	Favorite Brand				+
Last Visit	Jan 19 2018	Favorite Color				+
		First Name				+
		First Purchase Date				+
		Gender				+
		In Store Purchaser				+
		Last Name				+
		Newsletter Subscriber				+
		oneSignalClickthroughRate				0
		oneSignalId				+
		Persona				+
		Phone				+


## Purchased/Viewed Items Stream

Available on the *Overview* tab, the stream lists all items viewed or purchased for the listed time period or all time.

- Items are listed by most recent visit
- Purchased items are green
- Viewed but not purchased items are gray

Jan 16, 2018
6:39PM
31m 43s


\$455.00 Purchased
1 Items




**Lincoln Blazer**

1 Purchased

\$455.00 Each



Linen Blazer



Henley Tee