

# Understand the Unified Customer Profile Screen for SaaS



## 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. 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 for SaaS users and accounts.

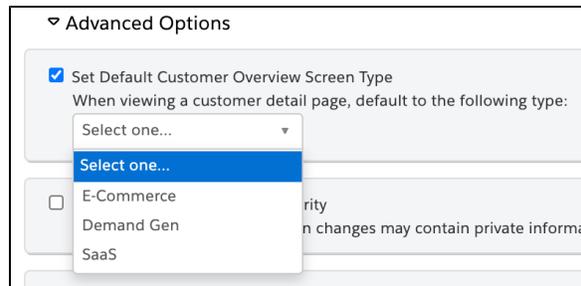
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## Set the Default Customer Profile Screen Type

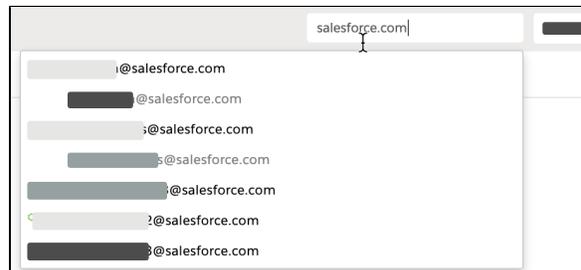
You can change the default setting for the affinities wheel so it is relevant to demand generation, SaaS/customer success, or e-commerce businesses.

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 **SaaS**
6. Click **Save**



## Open the Screen

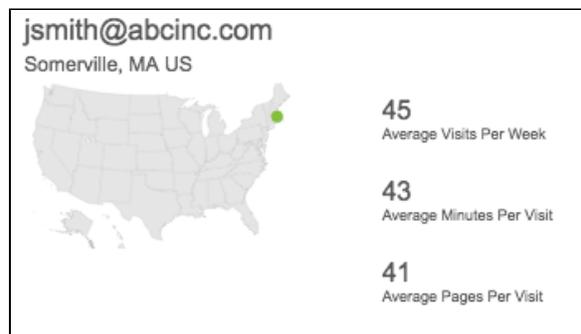
1. Access *Interaction Studio*
  2. In *Search* in the upper right corner of the screen, type a partial name to see a list of matching users (or accounts)
- OR
3. Click **User Segment** or **Account Segments**
  4. Select a segment you'd like to explore and click **DETAILS**
  5. Select a user or account and click **DETAILS** to access the *Unified Customer Profile Screen*



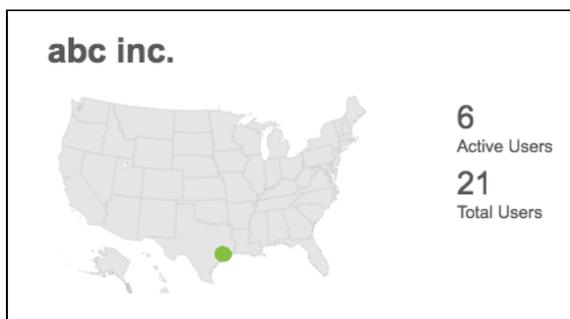
## SaaS User or Account Snapshot

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
- **Average Visits Per Week (user only)**—average number of times user opens the application each week
- **Average Minutes Per Visit (user only)**—average number of minutes user is active in the application for each visit
- **Average Pages Per Visit (user only)**—average number of pages in the application the user views during each session
- **Active Users (account only)**—number of users active in the application show in real-time
- **Total Users (account only)**—total number of registered users in the application

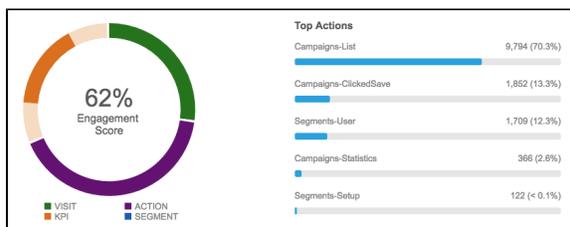


As you scroll down the page, this section will collapse to show only user location. Scroll up to restore details.



## Engagement Score and Actions

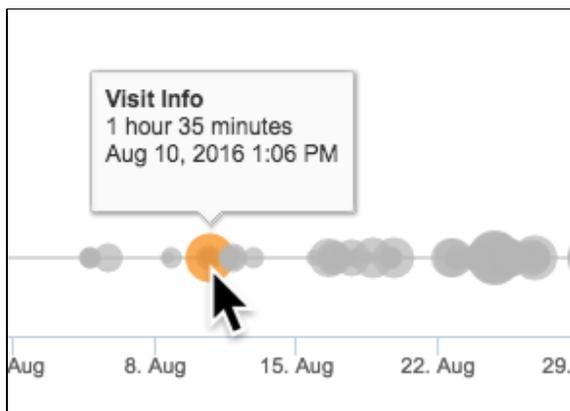
- Total Engagement Score is calculated by Visit, Action, KPI, and Segment data. The components used to calculate engagement are defined during engagement configuration
- Top Actions list the top activities (total number and percentage of total actions) performed in the application as configured in *SETTINGS > Engagement > Engagement Configuration > Actions*
- As you scroll down the page, this graph will collapse to show summary information. Scroll up to restore details



## Visit History

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

- Hover over a visit for details about the visit
- Drag across the timeline to zoom in on a particular period of time; click **ALL TIME VISITS** on the right to reset the view
- Multiple visits on the same day will be layered
- Selected visit will be orange



## Detail Tabs

The bottom section of the screen includes tabs that give additional detail including:

- **Overview**—includes details like the Interaction Studio ID, first and last date seen, as well as specific attributes. If you have integrated your CRM, account details will be included here and indicated with the CRM in parentheses. Add any attribute details by clicking . Make changes to saved attributes by clicking the hyperlinked attribute, making the change and clicking .
- **Users (account only)**—lists all users associated with the account. Users who are active in the application at that moment are indicated by .
- **Segment Membership (user only)**—lists all segments the user is a member of
- **Segment Compare**—details about the user's or account's active users history 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* of active users, average engagement, activity details, KPIs, and important actions
- **Action Details**—lists tracked actions of the individual user or all users for the account. Click the down arrow next to any column name to sort or add/remove columns
- **Visit History (account only)**—lists visit details for each user in the account. Similar to the main *Visit History* timeline above,

Overview	Users	Segment Compare	Action Details	Visit History	Event Stream
<b>Details</b>					
Account ID	abc inc.				
Account Name					
Account Type	Customer (Paying)				
First Seen	Jul 8 2016				
Last Visit	Nov 3 2016				
<b>Attributes</b>					
AccID (Salesforce)					
Account Level (Salesforce)	VIP				
Account Manager (Salesforce)	Ken Simon				
Account Manager Email Address (Salesforce)					
Account Manager Phone Number (Salesforce)					
Account Manager Photo (Salesforce)					
Account Type (sf)					
Age In Weeks (Salesforce)					
CSM Owner (Salesforce)	Ken Simon				
CSM owner (Salesforce)					
Churned (Salesforce)	false				
Email Platform Used (Salesforce)	StrongView				
Experience Designer (Salesforce)					
Experience Designer Email Address (Salesforce)					
Experience Designer Phone Number (Salesforce)					
Experience Designer Photo (Salesforce)					
Total Funnels	!				
FunnelsUsedInFilter	false				
OwnerId (Salesforce)	00632000005KTOVAAG				
Use Case (Salesforce)					
VIP (Salesforce)	false				

each graph lists the visits for the individual user listed. Drag across the timeline to zoom in on a particular period of time; click **ALL TIME VISITS** on the right to reset the view

- **Event Stream**—lists all actions or URLs clicked in the application with a timestamp. Select an entry to see more details including the user ID, browser, and specific URL

## Vertical Actions Timeline

Available on the *Overview* tab, the stream lists all actions completed in the application for the listed time period (all time).

- Items are listed by most recent visit
- All user visits are listed so there may be more than one visit listed for a particular day
-  indicates a user clicked the specific action listed
-  indicates a user viewed the specific page or screen listed

Showing Visits Between		
Jul 8, 2016 – Nov 3, 2016		
<b>Nov 3, 2016</b>	<b>11:43AM</b>	<b>5m</b>
Campaigns-ClickedSave		
Campaigns-List		
Campaigns-List		
Campaigns-List		
Campaigns-List		
Campaigns-List		
Campaigns-List		
Campaigns-List		
Campaigns-List		
<b>Nov 3, 2016</b>	<b>9:59AM</b>	<b>48m</b>
Campaigns-ClickedSave		
Campaigns-ClickedSave		
Campaigns-ClickedSave		
Campaigns-ClickedSave		
Campaigns-ClickedSave		
Campaigns-ClickedSave		
Campaigns-ClickedSave		
Campaigns-List		
Campaigns-List		
Campaigns-List		
Campaigns-List		
Campaigns-ClickedSaveAndClose		
Campaigns-ClickedSaveAndClose		
Campaigns-ClickedSave		
Campaigns-ClickedSave		
Campaigns-List		
Campaigns-List		

Help