Understand the Unified Customer Profile Screen for Demand Generation

> ⚠️ **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 on a demand generation site. |

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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 **Demand Gen**
6. Click **Save**
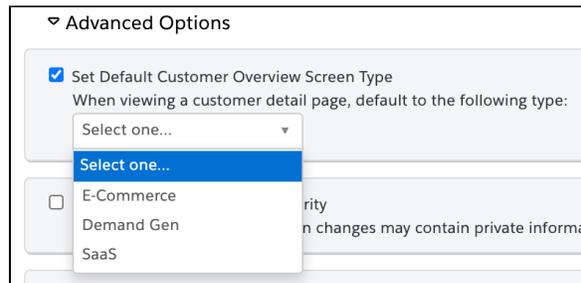
Open the Screen

1. Log into *Interaction Studio*
2. In *Search* in the upper right corner of the screen, type a partial 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*


Demand Generation User or Account Snapshot

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

- **Location**–indicated by a green circle on a map
- **Active Users**–number of users that have visited in the past two business cycles. Configure business cycles in *Settings > Engagement*
- **Total Users**–total number of users in the account
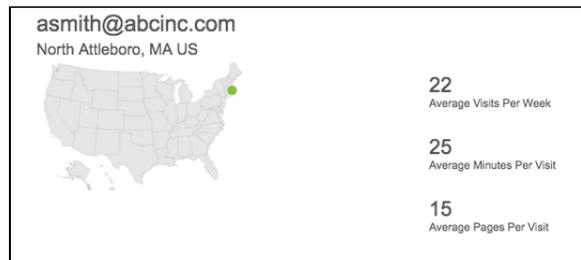
As you scroll down the page, this section will collapse to show only user location. Scroll up to restore details.

abc inc.

0
Active Users
32
Total Users
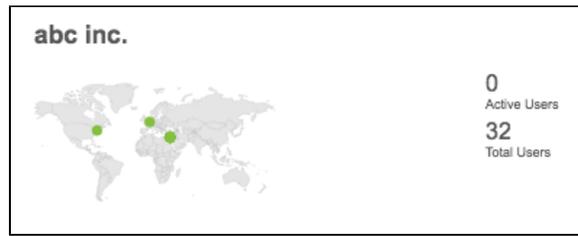
Affinities Graph

- **Affinities** are calculated based on how much a visitor interacts with an item compared to other items for that item type based on the selected criteria:
  - 👁 –**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 visitor looked at articles by Author A significantly more than any other author, the visitor would be affine to Author A when the selected criteria is *By Views*. However, if the same visitor spent more time viewing an article or articles by Author B than any other author, the visitor would be affine to Author B when the selected criteria is *By View Time*.
- Hover on the category to view **% Affine**. For example, this shows a 72% affine to authors based on the viewing history of the visitor (or all visitors in an account view)
- As you scroll down the page, this graph will collapse to show summary information. Scroll up to restore details
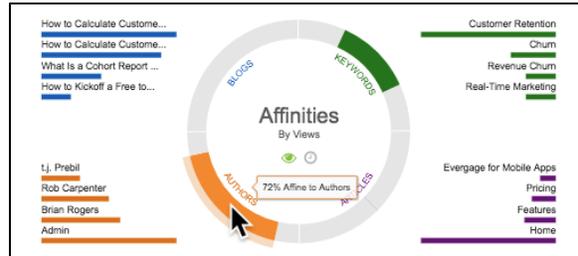
Visit History

Located in the middle of the screen, *Visit History* maps website 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

Visit Info
1 hour 35 minutes
Aug 10, 2016 1:06 PM
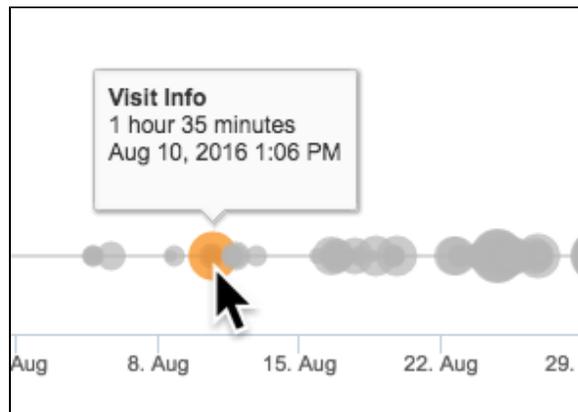
Detail Tabs

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

- **Overview**–includes details like the Interaction Studio account 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. If the user is associated with an account, click the account attribute to view the *Unified Customer Profile* for that account. 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 visitors associated with the account. Visitors who are active on your site 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 visitor or all visitors 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 visitor from the account. Similar to the main *Visit History* timeline above, 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 (page loads, clicks, and form completions) or URLs clicked in the application with a timestamp. Select an entry to see more details including the user ID, browser, and specific URL
- **Affinity Details**–lists affinities by selected item type along with a streamgraph that shows a visual representation of the affinities. 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

Viewed Items Stream

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

- Items are listed by most recent visit
- All items viewed are listed so there may be more than one item listed for a particular day