



Episerver Insight

User Guide





© EpiServer 2018

Table of contents

Episerver Insight	4
Viewing profiles	5
Viewing profile details	6
Profiles consolidation	9
Exporting profile data	9
Collecting profile data	10
Creating a marketing segment	11
Creating a segment	12
Editing a segment	13
Using a segment as a visitor group	14

Episerver Insight



Episerver Insight is part of the . It requires a specific installation and license, contact your system administrator to find out more. See for technical information.

Episerver Insight is a user interface for viewing and filtering visitor profiles, and creating customer segments that you can use in your omnichannel marketing campaigns. The Insight information is based on tracking of online visitor behavior , such as viewing content, or products on an e-commerce site.

Episerver Insight lets you view and use profile data in the following ways:

- **Viewing profiles.** Displays a list of visitors that have viewed your site.
 - Filters let you display profiles based on selected criteria.
 - An individual profile view shows detailed information such as name, email, company, country of origin (based on the visitor's IP address), the time of the last visit to the site, and so on.
- **Creating segments.** Create user segments from the profile list.
 - Each segment is an extract of profiles that match the criteria that you have set up for the segment.
 - You can use segments as criteria when you create visitor groups in Episerver CMS.

Viewing profiles

The **Profiles** view displays information about visitors and their activity on your site. You can do the following in **Profiles** view.

- Filter the **Profiles** view by selection options in the **Contact**, **Last Seen**, and **Country** columns. Options that are not matched by any profile appear dimmed.

- **Contact**. Filter on profiles that have any kind of contact information.
 - **Anonymous** if the profile does not have any contact information.
 - **Identified** if the profile has a full name.
 - **E-mail** if the profile contains an email address.
 - **Phone** if the profile contains a telephone or mobile number.

Profiles that are associated with contact information such as phone number or email address display icons in the Contact column.

- **Last seen**. Lists the profiles and their last tracked activity within the defined time spans. Profiles that match a search or filtering are listed by **Last Seen** in descending sort order by default.
- **Country**. Lists profiles connected to a certain country.
- Sort each column by clicking on the column headers: **Name**, **Company**, **Country**, or **Last Seen**.
- Search profiles for names, companies, and so on. Matches appear instantly.
- Create a segment from any filtered result by clicking **Save as segment....** See [Creating a marketing segment](#).
- View individual profile details by clicking on the profile record.

Detailed profile information appears when you select a row in the **Profiles** view.
See **Viewing profile details**.

DashboardCMSCommerceInsightAdd-ons

epi ? admin@example.com

ProfilesSegments

Filter Profiles

Select one or several items in a group

Search

Export to fileSave as segment...

Contact

Any

Anonymous

Identified

E-mail

Last Seen

Any

1 day

1 week

1 month

6 months

1 year

less

Country

Any

Australia

Austria

Brazil

Canada

more

Clear filters

69 of 107

Name	Company	Country	Last Seen	Contact
Randy		AU	Today	
Harper		US	Today	
Vauzo		US	Today	
Albert		US	Today	
Innovo		DK	Today	
Terry		KR	Today	
Sarabi		HU	Today	
Willie		US	Today	
Nancy			Today	
Perkie		US	Today	
Wayne			Today	

Viewing profile details

Each profile has a unique identity (GUID) to distinguish between visitors with no contact information at all.



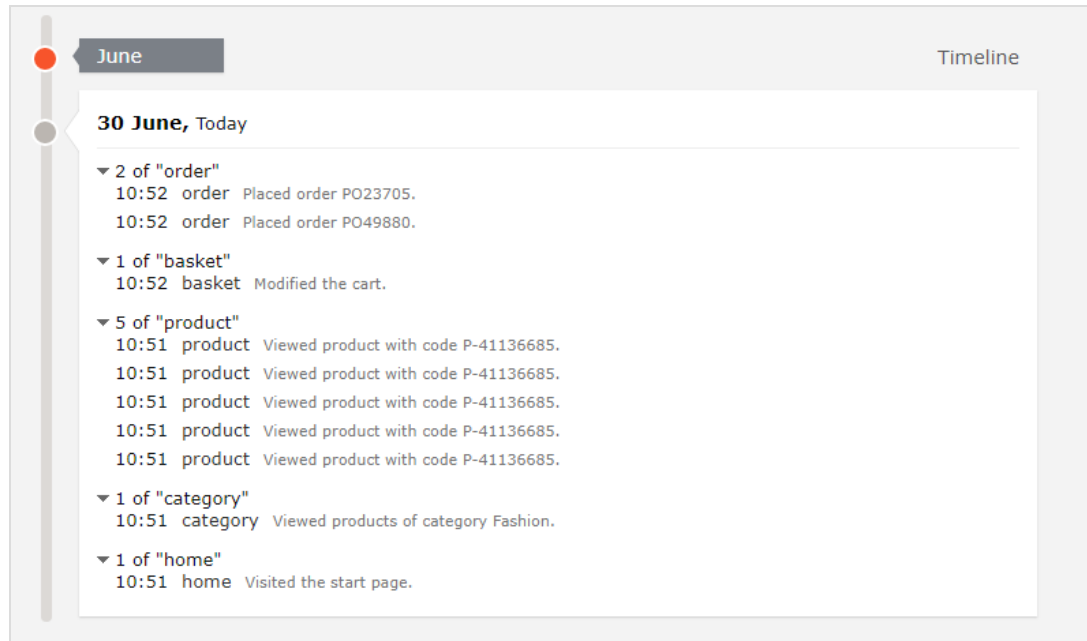
Cookies track a visitor's behavior. If a visitor deletes cookies between visits, or visits a website from more than one device (such as a mobile phone and a computer), then the visitor may be connected to more than one profile.

Each profile contains detailed information that is collected for a visitor in three sections. Click a profile to display the details; click **Go to list** to go back to the **Profiles** view.

- The visitor's contact information appears at the top.

The screenshot shows the Episerver Insight 'Profiles' view. At the top, there's a navigation bar with 'Dashboard', 'CMS', 'Commerce', 'Insight' (highlighted), and 'Add-ons'. A user profile 'admin@example.com' is visible in the top right. Below the navigation, there's a 'Profiles' tab and a 'Segments' tab. A 'Go to list' button is on the left. The main content area displays a profile for 'InfoLink', which is identified as '#47 of 69 in list'. The profile includes a placeholder for a profile picture, the name 'InfoLink', and the status 'No company yet'. Below this, there's a section for 'Contact Information' with fields for 'E-mail' (InfoLink@example.com) and 'United States' (Location). To the right of the contact information is a 'Summary' section with fields for 'Visits' (1), 'Last Seen' (Today), and 'Identity' (fbfd8d-1cb9-4549-b1f7-b63ad928f460).

- The visitor's events appear in a time line, grouped by type such as by orders placed, shopping cart, viewed products and categories, and home page visited. You can select each event to display more information.



The timeline shows the dates for each visitor's activity per month including time and the traffic source. Click **Show all** or a specific event to expand for more detailed information. By clicking **Show more** at the bottom of the time line you can expand the timeline to show activities further back in time.

The timeline tracks the number of the following activities:



Select the URL if you want to view the page that tracked the activity.

- **Viewed products.** Expand to see the time and product code on the website.
- **Placed orders.** Expand to see the time and order number.
- **Visited categories.** Expand to see the time and categories user visited.

- **Shopping cart** (displayed as Basket). Expand to see the time that user updated the shopping cart.
- **Homepage**. Expand to see the time that user visited website homepage

Profiles consolidation

One user can have several profiles when the user visits the site using different browsers or several devices. The Profile Store detects and merges profiles that correspond to one person based on the user's email address.

Profile Store creates a new anonymous profile each time an anonymous visitor enters a site for the first time. The email address is stored in a corresponding profile when an email is provided in the tracking request, depending on how the tracking implementation is designed for a specific website, but tracking usually happens after visitor logs into a website.

If the user browses the site with another browser or another device, the activity is tracked and linked to another anonymous profile until a tracking request contains a user email address. When this occurs, Profile Store examines other existing profiles with the same email address and, if found, associates the device with this profile and merges the statistics. After a profile is consolidated, the anonymous profile is removed and additional user activity on both devices or browsers is tracked and associated with the consolidated profile.

Exporting profile data

You can export profile data to a CSV file by selecting the filters you want to create the data set and clicking **Export to File**.

The screenshot shows the 'Filter Profiles' section of the Episerver Insight dashboard. The top navigation bar includes 'Dashboard', 'CMS', 'Commerce', 'Insight', and 'Add-ons'. The user is logged in as 'admin@example.com'. The 'Filter Profiles' section has a search bar and two buttons: 'Export to file' and 'Save as segment...'. Below the filters, there are three filter groups: 'Contact' (Any, Anonymous, Identified, E-mail), 'Last Seen' (Any, 1 day, 1 week, 1 month, 6 months, 1 year, less), and 'Country' (Any, Australia, Austria, Brazil, Canada, more). A table below shows the results, with columns for Name, Company, Country, Last Seen, and Contact. The first row shows 'Randy' with country 'AU' and 'Last Seen' 'Today'. A red arrow points from the 'Export to file' button to a notification at the bottom that says 'From Australia lastcsv'.

Collecting profile data

If a user signs in, Episerver Insight extracts the data from the registered information (such as Full Name and Street/Mail Address) and the user's country, based on IP address. If there is no data supplied, the user's identity is marked as **Unknown**. The following list shows fields and the strings each represents.


- **E-mail.** Email that user registered with.
- **Name.** Full name from register information (such as *Jane Doe* or *Hans Strueber*).
- **Last Seen.** The number of days that user last logged in the website (such as *Stanley & Co.* or *Barrett Ltd.*).

- **Country.** Two-letter country code (such as *US*, or *SE*).
- **Web or Home page.** URL for a website.

Creating a marketing segment

A segment is collection of user profiles that you can use to target website content and optimize your online campaigns. For example, you can create a segment for visitors that have previously responded to a campaign and display a loyalty discount code for only returning visitors; see personalizing content and using visitor groups in the Episerver CMS Editor User Guide

Segments are dynamic. If you create a segment that matches the criteria *visitors from Sweden, two visits within the last fortnight*, the profiles change as new visitors view the site and previous visitors do not return.

The **Segments** view shows segments that are recently created and segments labeled as your favorites. To designate a segment as a favorite, select the star icon . You can search and filter segments.

Dashboard CMS Commerce **Insight** Add-ons

Profiles **Segments**

Segments Gather profiles with things in common into manageable groups

Find a segment

Recent
Favorites
Yours
All
Archived

Yours and your favorites with recent changes

Title	Modified	Manager
☆ From Viet Nam last seen within 1 year NEW	Today	admin@example.com
☆ From Russian Federation last seen within 1 year NEW	Today	admin@example.com
☆ From Canada last seen within 1 week NEW	Today	admin@example.com
☆ From Brazil last seen within 6 months NEW	Today	admin@example.com
☆ From Brazil last seen within 1 month NEW	Today	admin@example.com

[More of yours](#) [More favorites](#)

Other recently changed segments

Title	Modified	Manager
No segments in this list yet		

[More recently changed segments](#)

Creating a segment

1. In the **Profiles** view, select the filters you want from the **Contact**, **Last Seen**, and **Country** columns.
2. Click **Save as segment....** The **Create Segment from Filter** dialog box appears.

Create a Segment From Filter

Segment name

Available in visitor groups ☐

Create **Cancel**

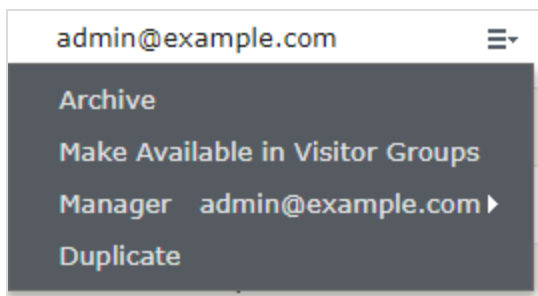
3. Enter a name for the segment.
4. Select **Available in visitor groups** if you want the segment to be used in visitor groups.
5. Click **Create**. The new segment appears in the **Segments** view.

Editing a segment

You can edit the attributes of a segment from its context menu in the Segments list. You can also click on the individual segment to modify its attributes. Episerver Insight automatically saves actions you make. If you have pending changes in your draft, click **Apply changes**.

- **Title**. Edit the title of the segment.
- **Description**. Enter a description about the segment.

You can apply additional attributes through the **Actions** menu.



- **Archive**. Select this option to remove the segment from the **Segments** view. Refresh the screen to update the list. You can deselect this option in the **Archive** view to restore the segment to the **Segments** view.
- **Make available in visitor groups**. Use this segment in visitor groups.
- **Manager**. Choose the person you want to be responsible for managing this segment.

- **Duplicate.** Create a copy of the segment that you can modify to create a new segment.

Using a segment as a visitor group

When creating a segment, you can choose to make it available to visitor groups in Episerver CMS. Once available there, you can set up a visitor group that uses this segment as a criterion and then personalize your website content for this visitor group specifically.



You may need administration rights to set up new visitor groups.

For example, if you want to give a loyalty bonus to those of your customers that participated in your last Spring campaign the next time they return to the website, follow these steps:

1. In the **Profiles** view of Episerver Insight, select the **Spring campaign** to filter on the users that participated in this campaign.
2. Click **Save as segment**, select the **Available in visitor groups** check box, and click **Create** to save the segment.
3. In the global menu, go to **CMS > Visitor groups** and click **Create** to create a new visitor group.
4. Drag the **Segment membership** criterion from the pane on the right and drop it into the **Drop new criterion here**.

Create Visitor Group ?

Adapt content on your website by first creating visitor groups and then using the groups to target the content on pages.

Criteria

Match: All

Drop new criterion here

Segment Membership Segment: Spring campaign

Other Information

Name:

Notes:

Security role: ☐ Make this visitor group available when setting access rights for pages and files

Statistics: ☒ Enable statistics for this visitor group

Insight Criteria

Segment Membership

Site Criteria

Time and Place Criteria

URL Criteria

Visitor Groups

Save Cancel

- a. Select the segment you want from the **Segment Membership** drop-down list.
 - b. Name the visitor group and add other criteria if necessary, and then save the visitor group.
5. In Episerver CMS, create a new block, or reuse an old one, that contains the loyalty bonus information.
6. Add this block to a page and click **Personalize** from the context menu. Select your new visitor group from the list. See also Personalization in the *Episerver User Guide*.

Episerver Digital Experience Cloud

The Episerver Digital Experience Cloud™ unifies digital content, commerce and marketing in one platform, including omnichannel solutions for intelligent campaigns. The platform uses artificial intelligence and behavioral analytics to deliver personalized experiences everywhere. With our secure, reliable platform you can quickly increase engagement, revenue and productivity, while getting the fastest time to value.

About Episerver

At Episerver, we believe digital transformation is a journey. We have been guiding customers for more than 20 years in providing standout digital experiences. Today our network of 880 partners, in 30 countries, supports 8,000 customers and over 30,000 websites. Founded in 1994, Episerver has offices in the US, UK, Sweden, Australia, Germany, Denmark, Finland, Norway, Poland, the Netherlands, Spain, South Africa, Singapore, Vietnam and the UAE.

For more information, visit [episerver.com](https://www.episerver.com).



www.episerver.com