Episerver Visitor Intelligence

User Guide

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Episerver Visitor Intelligence User Guide

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Table of contents

Visitor Intelligence **4**
Viewing profiles 4
Viewing profile details 6
Consolidating profiles 8
Exporting profile data 8
Collecting profile data 9
Creating a marketing segment 10
Creating a segment by filtering visitor profile data 10
Creating a segment based on filter definition 11
Editing a segment 14
Using a segment as a visitor group 15
Using a segment as a target group in Episerver Campaign 16
Reports view 16

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Visitor Intelligence

> **Note**: Episerver Visitor Intelligence is part of the Episerver Customer-Centric Digital Experience Platform (DXP). It requires a specific installation and license. Contact your system administrator to find out more. See Episerver World for technical information.

Visitor Intelligence (formerly 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 Visitor Intelligence information is based on tracking of online visitor behavior, such as viewing content, or products on an e-commerce site.

You can access Visitor Intelligence via the product switcher , or Episerver Campaign start menu > **Analytics** > **Insight**.

Visitor Intelligence 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.

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- **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.
- **Visitor Group**. Lists visitor groups that a developer has tracked by updating your solutions' tracking events. For example, if you want to create a group of users who have visited *Contact Us* in a specific geographic region, create a visitor group with the criteria, track the visitor groups, and create a segment of users in that visitor group.

  > Note: The visitor group tracking method is part of *EPiServer.Tracking.Cms* from version 1.9.0. See Visitor group tracking on Episerver World for developer information about visitor group tracking.

- 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.

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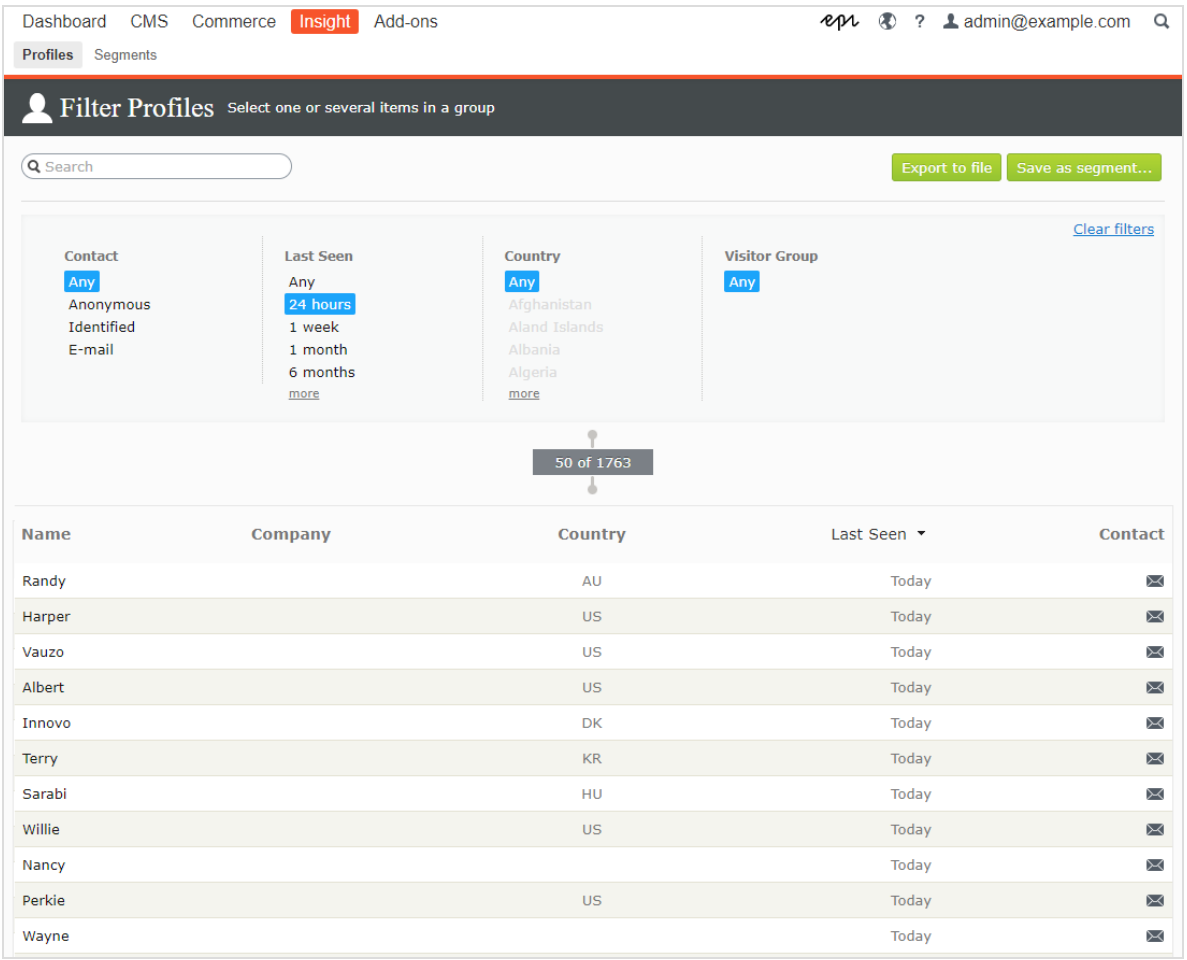

Viewing profile details

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

> **Note**: 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.

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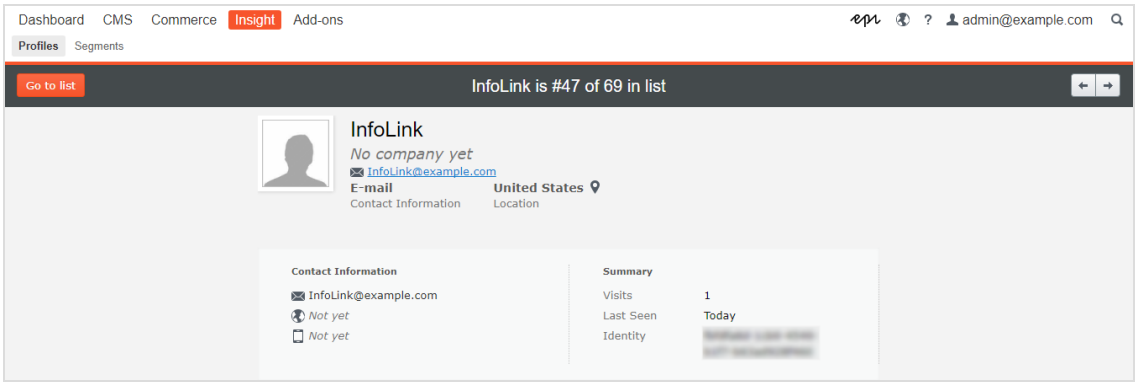
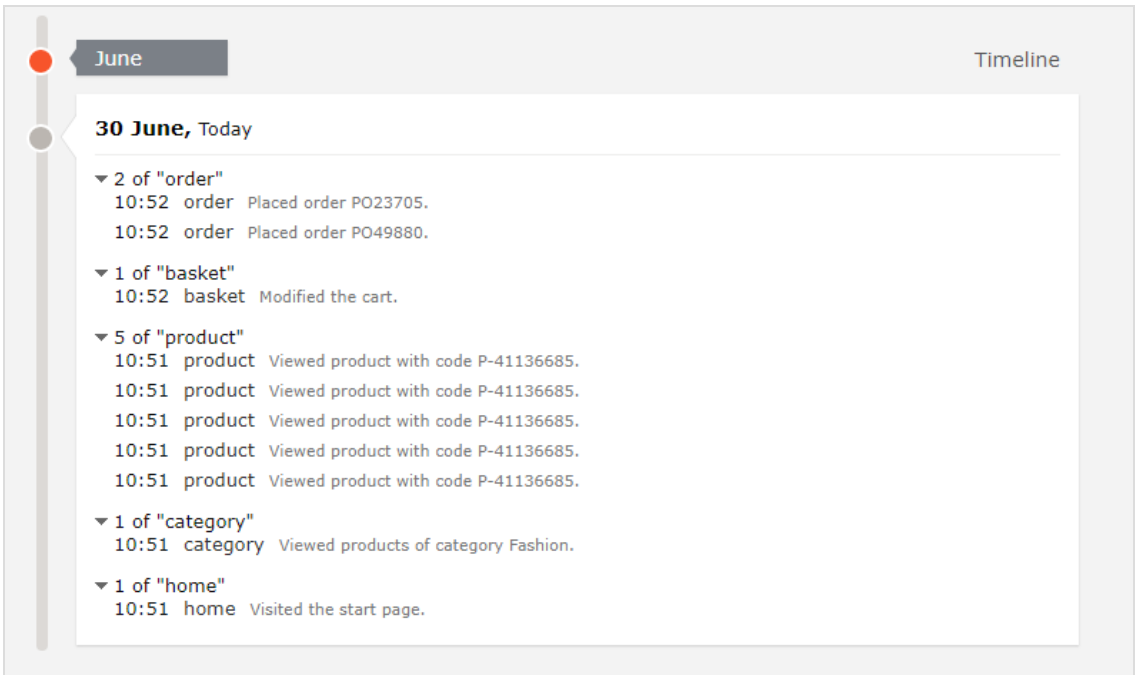
- The visitor's contact information appears at the top.



- The visitor's events appear in a timeline, 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 timeline you can expand the timeline to show activities further back in time.

The timeline tracks the number of the following activities:

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> **Tip**: 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

Consolidating profiles

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**.

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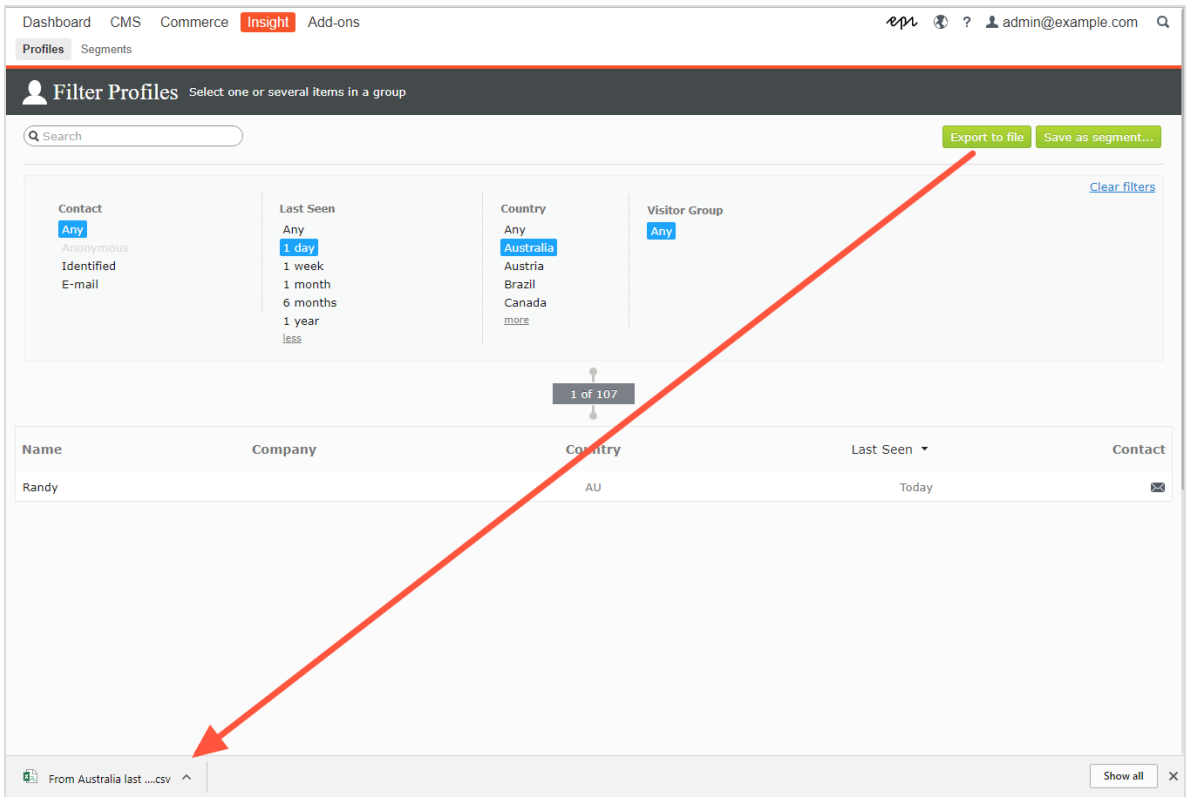

Collecting profile data

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.

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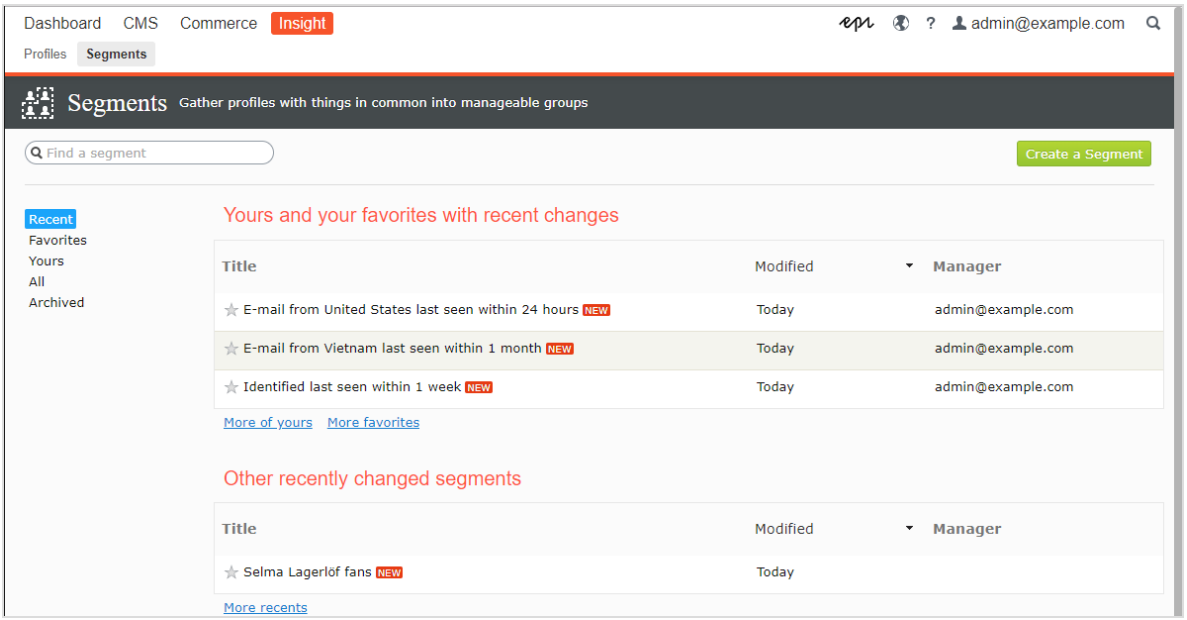
Creating a marketing segment

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 with 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 recently created segments, and segments labeled as your favorites. To designate a segment as a favorite, select the star icon ★. You can search and filter segments.



Creating a segment by filtering visitor profile data

You can create a segment by filtering visitor activity and historical data.

1. In the **Profiles** view, select the filters you want from the **Contact**, **Last Seen**, and **Country**, and **Visitor Group** columns.

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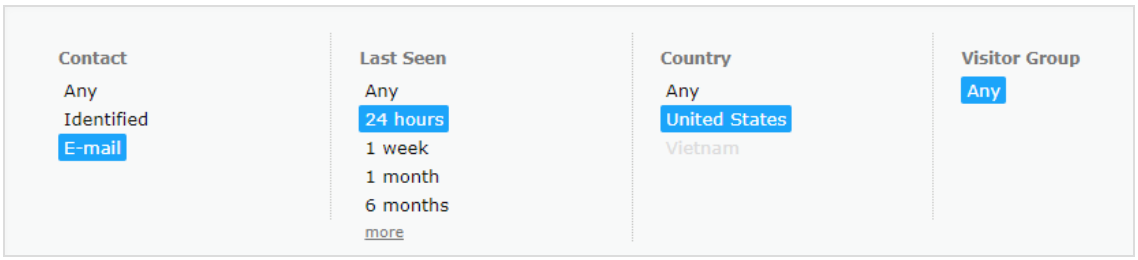
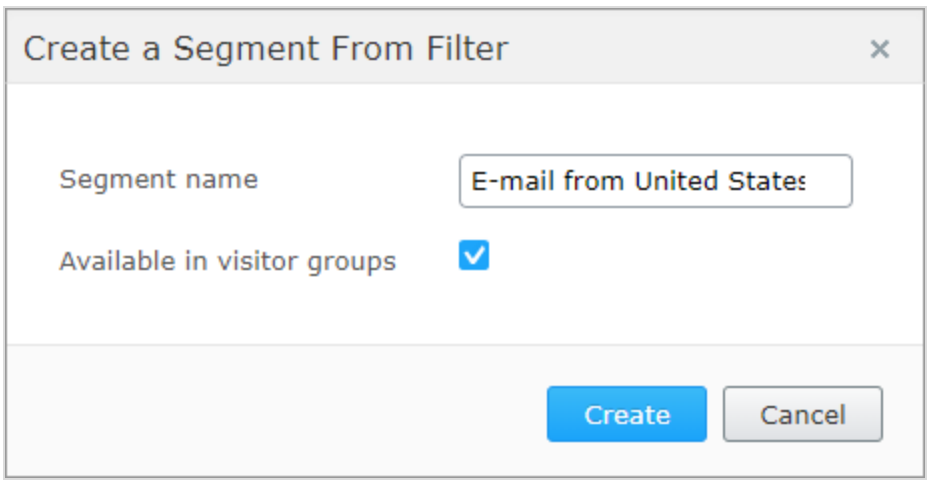


2. Click **Save as segment...**. The **Create a Segment From Filter** dialog box appears.



3. Enter a name for the segment, or accept the filled-in value.
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.

Creating a segment based on filter definition

Using filter definitions lets you create advanced segments on visitor activity and historical data, and profile data also.

You can create a segment based on visitor activity and historical data. For example:

- Visitors who have bought specific product during period
- Users who have ever opened any campaign email
- Visitors with abandoned carts today

> **Note**: Developers create filter definition templates to query and

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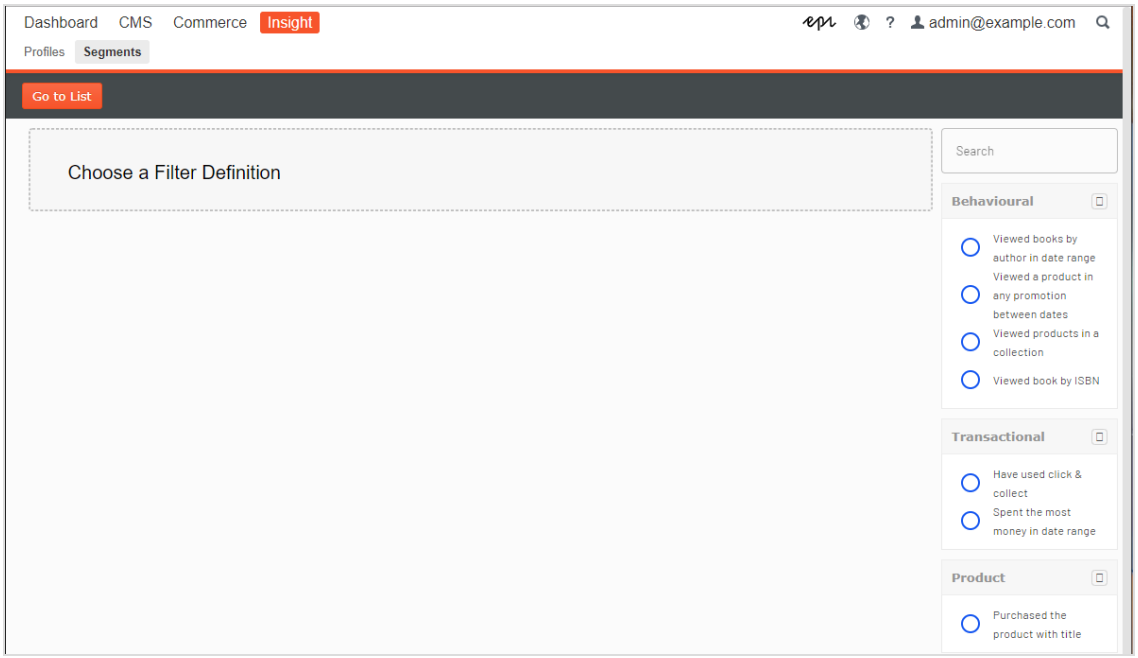
analyze event data. Marketers create segments based on reusable filter definitions and tracked statistics from group visitors. The images in this section are examples. Your developers may create different filters (and the user interface will appear different to you).

1. In **Segments** view, click **Create a Segment**. The **Segment filters** view appears. On the right side are categories (Behavioral, Transactional, Product) that you can expand to see the filters that your developers created.



2. Select a filter definition from one of the categories. (In the following image, **Have used click & collect** is selected from the **Transactional** category.) Its parameters appear in the view.
3. Fill in the parameters and click **Preview** to see which profiles the filter affects.

Note: Up to 1000 profiles that match the filter criteria are displayed in the **Preview of profiles** view.

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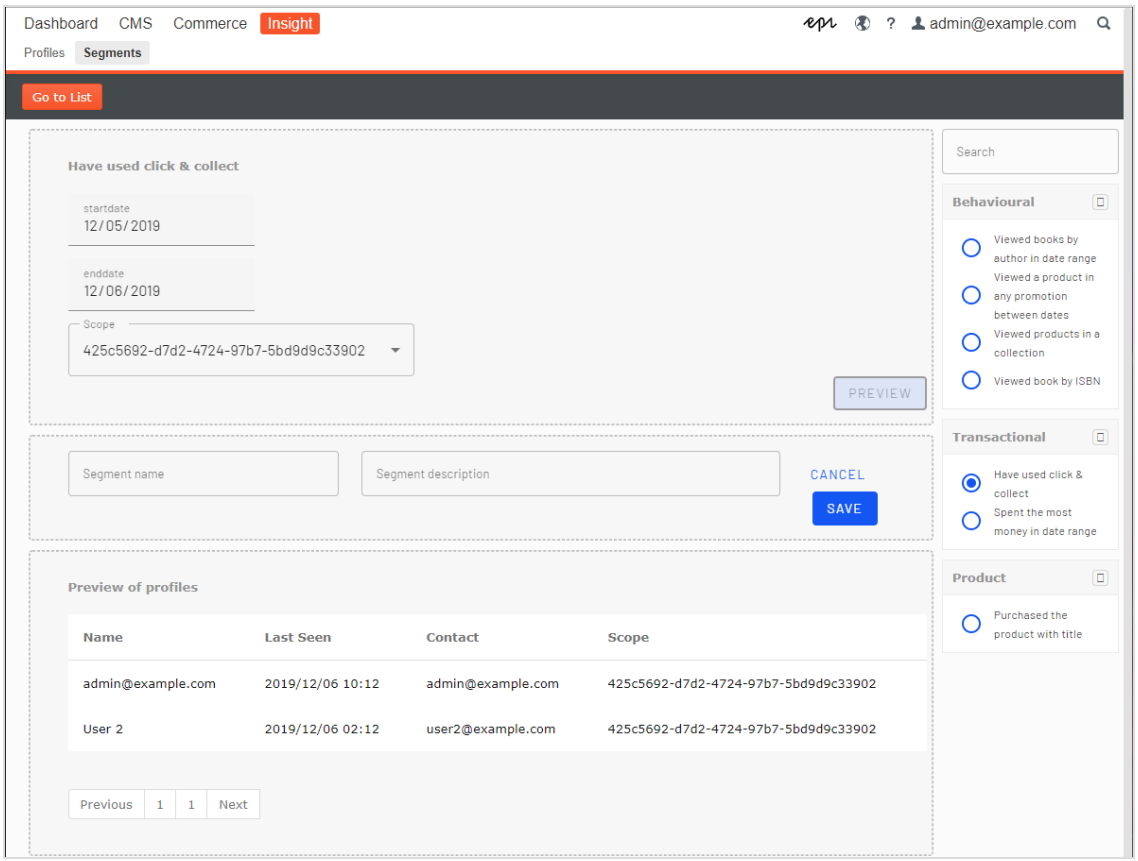
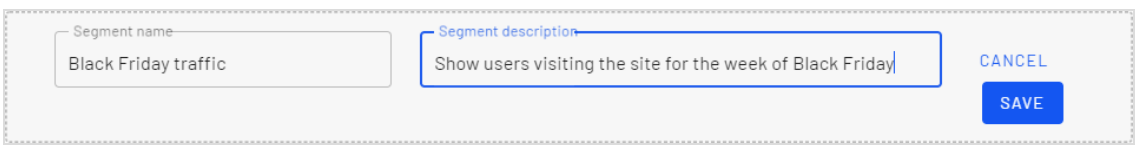


4. Give the new segment a name and description and click **Save**.



The segment is saved and added to the **Segments** view.

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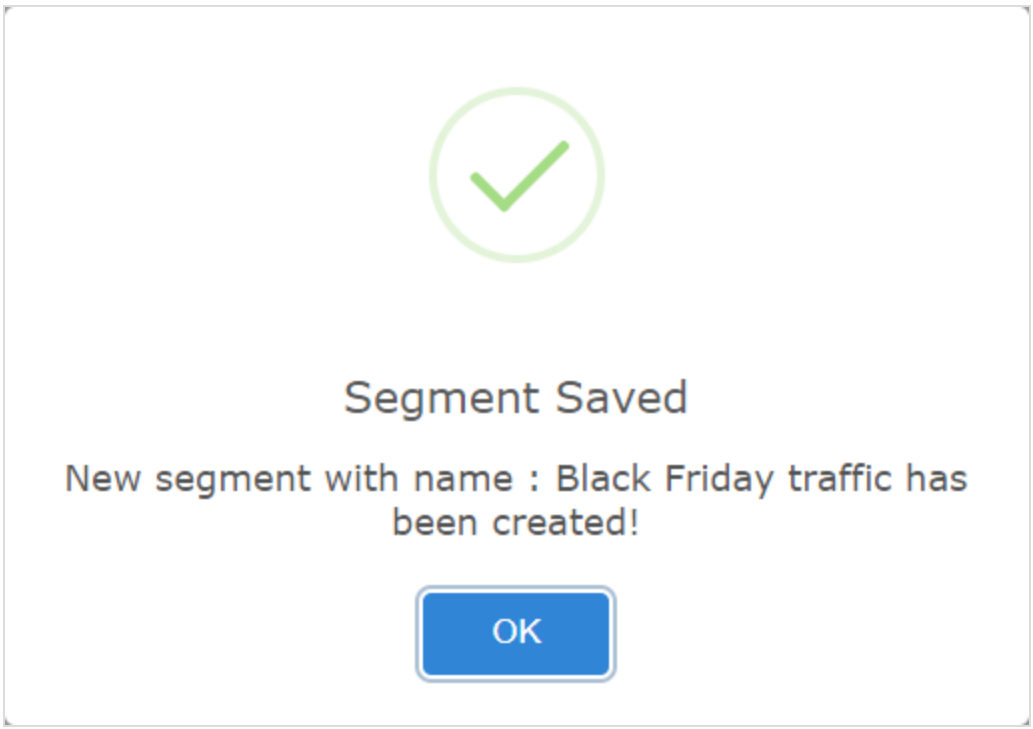
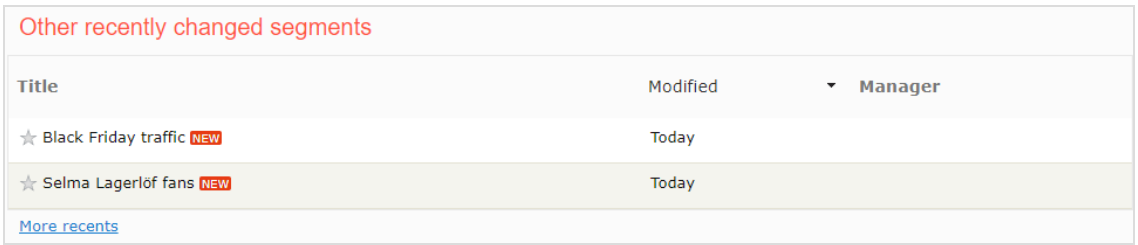


> **Note:** After you create a segment based on events data, a cache of matching profiles is built for the new segment. The cache for an event-based segment is refreshed daily.



Editing a segment

You can edit the attributes of a segment from its context menu in the **Segments** view. You can also click on the individual segment to modify it attributes. Episerver Visitor Intelligence 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.

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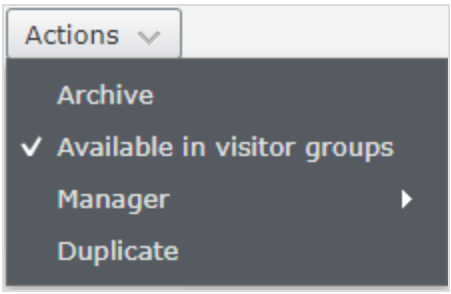
You can apply additional attributes through the **Actions** menu.



- **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.
- **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 you create a segment, you can 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.

> Note: You need administration rights to set up new visitor groups.

For example, if you want to use the Black Friday traffic segment that you created in the previous example, follow these steps:

1. Make sure that you set **Available in visitor groups** for the segment you want to use as a visitor group. This is so it shows up in the **Member of Segment** Insight criteria.
2. In the top menu, go to **CMS** > **Visitor groups** and click **Create** to create a new visitor group.
3. Drag the **Member of Segment** criterion from the **Insight Criteria** tab in the pane on the right and drop it into the **Drop new criterion here**.

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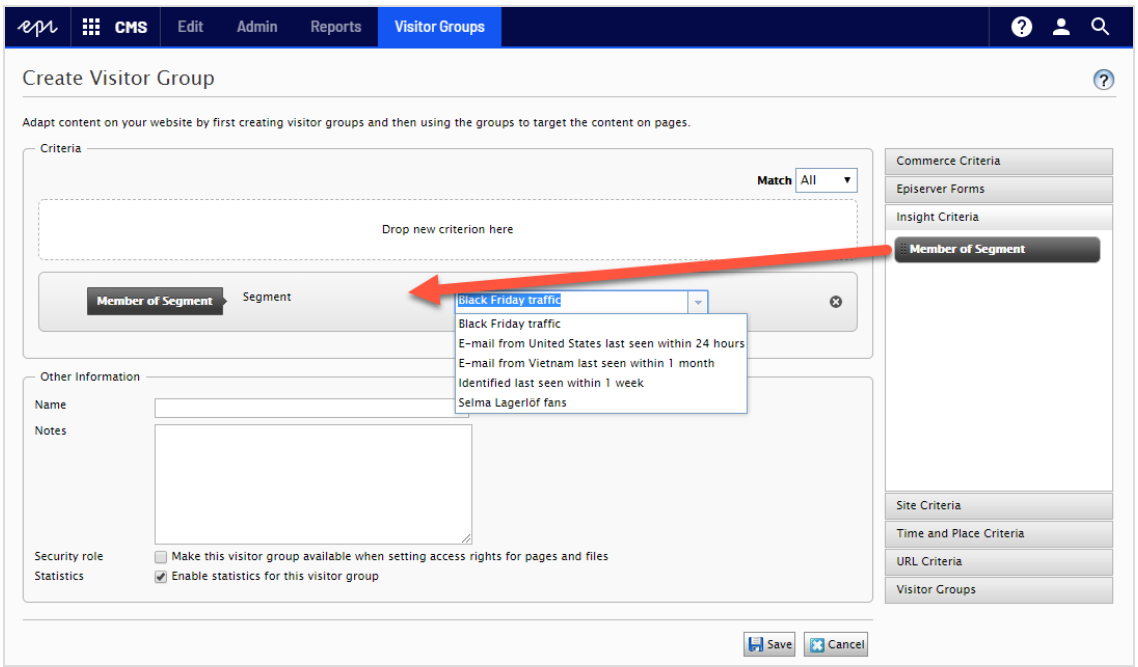

a. Select the segment you want from the **Segment Membership** drop-down list.
b. Name the visitor group and add other criteria if necessary, and then save the visitor group.

4. Personalize the content as described in the CMS Visitor groups topic and select your new visitor group from the list. See also Personalization.

Using a segment as a target group in Episerver Campaign

If you have Episerver Campaign, you can use segments from Visitor Intelligence as target groups for your campaigns. See Creating and editing campaign and Smart Campaigns nodes for how to do this.

Reports view

Episerver Insight provides the user interface to view commerce reports for insights into collected customer data. Each report is listed separately in the Report Section.

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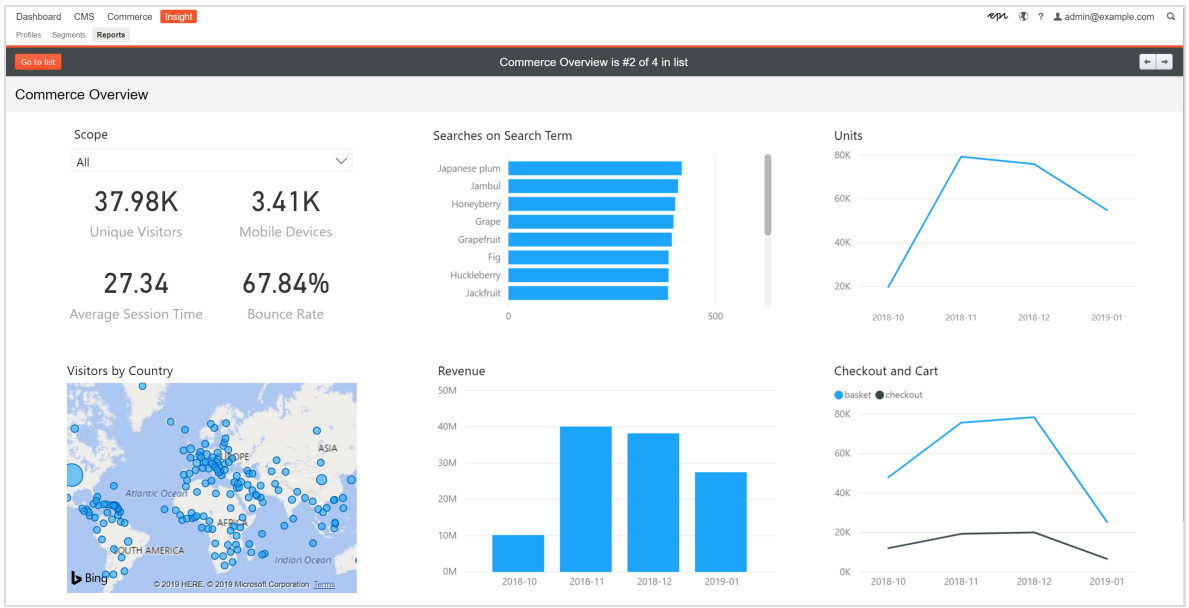

The commerce overview report contains the following charts for an e-commerce site. The charts help you understand how visitors are interacting with the site. The report is updated every hour. The reporting period is 3 months from past hour. The reporting period cannot be changed in the current version of Insight.

- **Scope Selector**. In the scope selector you can select a scope and see chart for that scope. By default, **All Scopes** is selected and data from all scopes are applied to charts. There is no issue If you have only one scope in Profile Store. But it would mix profiles and track events across all scopes when your site has more than one scope.
- **Unique Visitors**. Number of unique profiles who visited the site.
- **Mobile Devices**. Number of mobile devices used to visit the site.
- **Average Session Time**. The average time customers spend on the site in each session.
- **Bounce Rate**. The percentage of visitors who only visited the first (landing) page in the site and did nothing else.
- **Visitors by Country**. Number of visitors from each country/region. The size of the circle presents the amount of visitors.
- **Searches on Search Term**. Number of searches for each keyword that a visitor typed in the search bar.
- **Daily Revenue**. Total sells in each day.
- **Units**. Number of products sold in each day.
- **Checkout and Cart**. Number of checkouts and number of actions that added product into shopping cart.

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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**.

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