Einstein and Analytics

Salesforce, Summer '25

Summer '25

CONTENTS

EINSTEIN AND ANALYTICS IN MARKETING CLOUD ENGAGEMENT

Gain deep insights into the behaviors and interests of your contacts across channels. The insights provided in Marketing Cloud Engagement help you set marketing goals and refine customer journeys.
[1]

Analytics Builder

Analytics Builder enables you to gain deep insights into the behaviors and interests of your contacts across channels. Use these insights to set marketing goals and refine customer journeys.

Collect Tracking Code

Collect Tracking Code is a JavaScript snippet that captures data about the behaviors of known and unknown visitors to your site. You can use this data to enhance contact profiles and optimize customer journeys across channels through predictive and personalized recommendations. You can also update product and content catalog details in real time or track email-driven revenue.

Intelligence Reports for Engagement

Use Intelligence Reports for Engagement to generate, view, and share a detailed analysis of your email, push, and journey campaign-level data. Intelligence Reports for Engagement Advanced, which is available for an additional cost, includes more features, functionality, and analytics. Intelligence Reports on Hyperforce supports email and push channels.

Google Analytics Integration for Marketing Cloud Engagement

To use Google Analytics capabilities to track and analyze journey activity, integrate Google Analytics with Marketing Cloud Engagement. You can also view the resulting metrics directly in Marketing Cloud Engagement. Google's native authentication creates a secure link between your Marketing Cloud Engagement instance and your Google Analytics account.

Using Einstein in Marketing Cloud Engagement

In Marketing Cloud Engagement, Einstein provides insights and data to inform the content and timing of your marketing activities. Use powerful Einstein features to understand the engagement and behaviors of your customers so you can personalize every interaction that you create in Marketing Cloud Engagement.

Salesforce Audience Studio and Data Studio

View Salesforce Audience Studio and Data Studio documentation.

Analytics Builder

Analytics Builder enables you to gain deep insights into the behaviors and interests of your contacts across channels. Use these insights to set marketing goals and refine customer journeys.

With Analytics Builder, you can:

- Measure engagement and performance of your email campaigns.
- Configure dashboard views to visualize data in flexible tables, charts, and graphs.
- Use Collect to view contact behaviors such as clicks and purchases.
- Create targeted audience based on predictive behavior models.
- Track each interaction in a journey and measure progress towards your target in a single interface within Journey Builder.

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[1] Rights of ALBERT EINSTEIN are used with permission of The Hebrew University of Jerusalem. Represented exclusively by Greenlight.

Marketing Cloud Engagement provides many standard reports to track the effectiveness of your campaigns. You can run reports manually, schedule them to run automatically, and choose who receives the reports. For Hyperforce-supported reports, use Intelligence Reports. When you deactivate a user who created reports, their reports are deleted.

The Reports Overview screen provides access to all reports available for Email Studio, Mobile Studio, CloudPages, Microsites, Journey Builder, and Contact Counts.

Get the answers to frequently asked questions about the standard reports in Analytics Builder for Marketing Cloud Engagement.

SEE ALSO:

Use Standard Reports for Data Management and Analytics

Marketing Cloud Engagement provides many standard reports to track the effectiveness of your campaigns. You can run reports manually, schedule them to run automatically, and choose who receives the reports. For Hyperforce-supported reports, use Intelligence Reports. When you deactivate a user who created reports, their reports are deleted.

> **Note:** As of May 25, 2018, email reports that reference individual subscribers no longer include subscribers who were deleted using the legacy Email Studio delete functionality.

Standard reports cover Email Studio, Journey Builder, MobileConnect, MobilePush, Microsite, CloudPages, Contacts, and Administration.

1. From Analytics Builder, click **Reports**.

2. Select a standard report.

3. Configure your report.

4. Export or share your report.

Make sure that your report doesn't exceed 6 MB. For larger reports, use Enhanced FTP to send to recipients. A sending report failure is often due to the attached report being larger than the maximum size.

SEE ALSO:

Get Started with Reports

The Reports Overview screen provides access to all reports available for Email Studio, Mobile Studio, CloudPages, Microsites, Journey Builder, and Contact Counts.

The Reports Overview screen includes the following:

- New Reports—Lists the newest reports available in Marketing Cloud Engagement.
- Reports Shortcut—You can create and manage shortcuts to frequently used reports. Click **Add Shortcut** or **Select Shortcuts**.

- Reports Catalog—A searchable list of all available reports. To view a brief description for each report, click **View Catalog**. To view a brief description of each report in a specific category, select the category from the list.
- Saved Reports Menu—Click an item to populate the list with saved reports within that item's description.
- Saved Reports Grid—Lists all reports that you've saved, including relevant metadata for each. You can filter and sort your view. Click the name of the report to view the saved version, or click **Run** to run a new version of the report.

Enabled Discover reports have a blue cube icon.

The Activity Log screen provides detailed lists of reports running today, all scheduled reports, and your report history. This log includes both standard reports and Discover reports.

Create a Standard Report in Analytics Builder

Create and run a standard report in Marketing Cloud Engagement.

SEE ALSO:

Contacts Count Report in Analytics Builder

Microsite Tracking

Email Studio Reports in Analytics Builder

Journey Builder Reports

Mobile Studio Reports

Create a Standard Report in Analytics Builder

Create and run a standard report in Marketing Cloud Engagement.

1. From Analytics Builder, click **Reports**.

2. Click **View Catalog** for a list of available standard report templates.

3. Click **Create** next to the report you want to run.

4. Set report parameters. Options vary by report.

   💡 Tip: When you set a custom date range, the system generates a report based on data as it appears at 12:00 AM on that date. To include data from the end date, set the end date parameter to the following day. For example, if you want to include data from May 1 through the end of the day on May 17, set May 18 as the end date.

5. Click **Submit**.

6. Select an export or save option, and complete the required fields.

7. Click **Save**.

Some reports require you to select a format for file export. To email reports to more than one recipient, separate email addresses with a comma.

Contacts Count Report in Analytics Builder

The Contact Count report contains information on the total number of contacts in an account, and it runs weekly. The report also shows the Month End Report that runs on the last day of the month.

Contact Data Portability Report

View information included in the Contact Data Portability report for Contact Builder in Reports.

Microsite Tracking

The Microsite Tracking report displays tracking data from your microsite for a specific time frame you select. You can use this report to help evaluate the effectiveness of your email campaigns in driving traffic to your landing pages. Compare the likelihood of readers clicking one link rather than another. This report is available in the Reports tool.

Email Studio Reports in Analytics Builder

View a list and description of available Email Studio reports available in the Reporting tool.

Journey Builder Reports

View a list and description of Journey Builder reports available in the Reports tool.

Mobile Studio Reports

View a list and description of Mobile Studio reports available in the Reports tool.

Contacts Count Report in Analytics Builder

The Contact Count report contains information on the total number of contacts in an account, and it runs weekly. The report also shows the Month End Report that runs on the last day of the month.

⊘ **Important:** To view this report, enable the Access permission under Contacts. Find this permission in the Reports Catalog section of the Reports permission node.

Field	Description
Total distinct contacts	Number of distinct contacts used for billing purposes, it comprises: • Count of unique Contact Keys regardless of the channel source or method in which the contact entered Salesforce Marketing Cloud. See Contact Definition and Count Determination in Contact Builder for more information. • Contact key counts in populations to whom no sends have been attempted yet.
Distinct email addresses	Number of distinct email addresses other than those addresses deleted from the email channel. Unique email addresses used by more than one subscriber are counted only one time in this subtotal. This subtotal doesn't apply to the formula that computes Total Distinct Contacts.
MobilePush contacts	Number of mobile device addresses. This count is only for reference and doesn't apply to the formula that computes total distinct contacts.
MobileConnect contacts	Number of mobile SMS numbers. This count is only for reference and doesn't apply to the formula that computes total distinct contacts.
GroupConnect contacts	Number of mobile LINE addresses. This count is only for reference and doesn't apply to the formula that computes total distinct contacts.
Number of contacts in populations	Contact key counts in populations to whom no sends have been attempted yet.

Field	Description
Contacts from Triggered Sends	Total number of contacts associated with triggered sends but not associated with the All Subscribers list or another list in the triggered send configuration. Contacts from triggered sends that are performed at the child BU level aren't included in Total Distinct Contacts.
Leads from Sales and Service Clouds	Number of leads synchronized from Sales and Service clouds using Synchronized Data Sources in MC Connect.
Contacts from Sales and Service Clouds	Number of contacts synchronized from the Sales and Service clouds using Synchronized Data Sources in MC Connect.
Overlapping Leads and Contacts from Sales and Service Clouds	Number of leads converted to contacts in the Sales and Service clouds based on the two previous subtotals.
V2 Leads from Sales and Service Clouds	Number of leads synchronized from Sales and Service Clouds using version 3 or earlier of the Salesforce Connector.
V2 Contacts from Sales and Service Clouds	Number of contacts synchronized from Sales and Service Clouds using version 3 or earlier of the Salesforce Connector.
Leads, Contacts, and Accounts from Microsoft Dynamics CRM	Number of leads, contacts, and accounts respectively synchronized from Microsoft Dynamics CRM using the Dynamics CRM connector.

SEE ALSO:

Contacts Count Report in Analytics Builder

Create a Standard Report in Analytics Builder

Get Started with Reports

Get Started with Reports

Contact Data Portability Report

View information included in the Contact Data Portability report for Contact Builder in Reports.

This report contains information about a single contact record relation to data protection and privacy regulations. Use this report to provide information to a data subject who requests a copy of their information.

- Subscriber information
- Email statistics
- Subscriber attributes
- MobilePush information and statistics, as applicable
- MobileConnect information and statistics, as applicable
- GroupConnect information, as applicable

Note: Run this report at the top level of your account.

SEE ALSO:

Create a Standard Report in Analytics Builder

Microsite Tracking

The Microsite Tracking report displays tracking data from your microsite for a specific time frame you select. You can use this report to help evaluate the effectiveness of your email campaigns in driving traffic to your landing pages. Compare the likelihood of readers clicking one link rather than another. This report is available in the Reports tool.

This five-part report provides details about views and clicks for a microsite you choose over a period you specify:

- Sheet 1: Microsite Activity

- Sheet 2: Landing Page Activity

- Sheet 3: Email Related Activity

- Sheet 4: Web Related Activity

- Sheet 5: Detailed Link Click Tracking

Microsite Activity
Learn about the information presented in this subsection of the Microsites Report in the Reports tool.

Landing Page Activity
Learn about this subsection of the Microsites Tracking report in the Reports tool.

Email Related Activity
Learn about the information contained in this subsection of the Microsites report in the Reports tool.

Web Related Activity
Learn about this subsection of the Microsites Tracking report in the Reports tool.

Detailed Link Click Tracking
Learn about this subsection of the Microsites Tracking report in the Reports tool.

Microsite Activity

Learn about the information presented in this subsection of the Microsites Report in the Reports tool.

Field Name	Description
Unique Views	Number of unique views received
Total Views	Total number of views received
Unique Clicks	Number of unique clicks received
Total Clicks	Total number of clicks received

Landing Page Activity

Learn about this subsection of the Microsites Tracking report in the Reports tool.

Field Name	Description
Page Name	Name of the landing page tracked
Unique Views	Number of unique views received

Field Name	Description
Total Views	Number of views received
Unique Clicks	Number of unique clicks received
Total Clicks	Number of clicks received

Email Related Activity

Learn about the information contained in this subsection of the Microsites report in the Reports tool.

Field Name	Description
Email Name	Name of the email containing a link to the microsite
Job ID	Job ID of the email send tracked in this row
Send Time	Send time of the email.
Unique Views	Number of unique views of a landing page that resulted from this email send. Multiple views by the same person would be counted only once.
Total Views	Number of views of a landing page that resulted from this email send. Multiple views by the same person contribute to this total.
Unique Clicks	Number of unique clicks of links in a landing page that resulted from this email send. Multiple clicks by the same person would be counted only once.
Total Clicks	Number of clicks for links in a landing page that resulted from this email send. Multiple clicks by the same person contribute to this total.

Web Related Activity

Learn about this subsection of the Microsites Tracking report in the Reports tool.

Field Name	Description
Page Name	Name of the landing page tracked
Unique Views	Number of unique views from web traffic other than links in emails; multiple views by the same person would be counted only once.
Total Views	Number of views from web traffic other than links in emails; multiple views by the same person contribute to this total.
Unique Clicks	Number of unique clicks on the landing page from web traffic other than links from emails; multiple clicks by the same person would be counted only once.

Field Name	Description
Total Clicks	Number of clicks on the landing page from web traffic other than links from emails; multiple clicks by the same person contribute to this total.

Detailed Link Click Tracking

Learn about this subsection of the Microsites Tracking report in the Reports tool.

Field Name	Description
Page name	Name of the landing page tracked
URL	URL for the link clicked on the landing page
Link Alias	Tracking alias for the link clicked on the landing page
Unique Clicks	Number of unique clicks of the link; multiple clicks by the same person would be counted only once.
Total Clicks	Number of clicks for the link; multiple clicks by the same person contribute to the total

Email Studio Reports in Analytics Builder

View a list and description of available Email Studio reports available in the Reporting tool.

To create a standard Email Studio report, see Create a Standard Report in Analytics Builder.

Report Name	Description
A/B Test Summary	Contains summary and comparison information about one or more A/B test campaigns for the date range you specify.
Account Send Summary	Displays all potential response counts or rates for an account organized by send. Enterprise or reseller reports also display respective member results organized by account.
Attribute by Tracking Event	Displays how your subscribers reacted to a certain email send, based on a specific tracking event, and a particular attribute.
Campaign Email Job Tracking Summary	Displays the email tracking data for each job sent that is associated with the selected campaign. Use this report to get a complete list of all sends in a campaign and a quick summary of all relevant email tracking statistics.
Campaign Email Tracking Summary	Use this report to quickly see email level tracking statistics if the emails in your campaign are sent in more than one job. This report displays the send tracking data for a specific campaign. Displays the email tracking data for each email associated with the campaign. If an email is sent through multiple jobs, Analytics Builder summarizes the tracking data for each job by email.
Conversion Tracking Statistics	Displays all conversion activity across all your email sends over a specific time period.
Email Message Frequency	This report can't be viewed as a web page. Includes the number of customers received multiple email messages from period to period for comparison purposes. The available periods for

Report Name	Description
	comparison are: Yesterday vs. Day Before; Previous 2 Weeks Before Today; Previous Sunday to Sunday Weeks; Last 30 days vs. Previous 30 days; Previous 2 calendar months.
Email Performance by Attribute	Lets you evaluate email send results for different subscriber attribute and preference values.
Email Performance by Domain	Enables you to evaluate email send results for each domain sent to for a single send.
Email Performance by List	Enables you to assess response, bounce, and click-through rate for each list or group. The rate can be sent to as part of a send event that excludes email sent to a single recipient.
Email Performance for All Domains	Enables you to evaluate email send results for each domain sent to for a single send.
Email Performance Over Time	Shows data for all sends during a specific period.
Email Send	Shows how many emails have been sent from each of your accounts. This report can be run for any time period, present, or past.
Email Sends by User	Displays a list of account users who have sent emails during the specified date range and the total number of emails that each user has sent.
Email Send Performance by Audience Builder Segment	Shows send performance data by audience segment.
Forwarding Activity Details	Displays details for emails that are forwarded from subscribers to other individuals.
Impression Tracking by Job	Displays the number of times the content area was sent as part of a job. The count could be the number of impressions and the link performance for links found within the impression region.
Impression Tracking for Triggered Send by Period	Displays the performance of an impression region for triggered sends by a time period you choose.
List Demographics	Enables you to analyze your lists to see a breakdown of subscribers by status, domain, and subscription tool.
List Performance Over Time	Enables you to examine each of your lists to evaluate their effectiveness over time across multiple sends.
List Size Over Time	Displays the number of subscribers on a list over a specified time period. Includes a table showing the number of subscribers by status for each month in the specified time period. This data is also provided in a line graph.
Multi-Campaign Tracking Summary	Use this report to compare email performance across multiple campaigns. This report shows that email tracking summarized by campaign for all campaigns with a deployment date. The report shows tracking by the selected date range and the total of all selected campaigns for each tracking category.
Recent Email Sends Summary	Enables you to analyze a summary of your recent account activity.
Region Performance for Triggered Sends Over Time	Displays how a single section of content performs over a period across multiple triggered send jobs.
Region Performance Over Time	Displays how a single section of content performs over a period across multiple jobs.
Response Trend Analysis for Email Send	Displays how an email send has performed over a specified date range.

Report Name	Description
Send Classification by Email Tracking Report	Enables you to compare the send performance data of transactional and commercial sends.
Sendable Data Extension Demographics	Includes charts which show subscriber status breakdown and a top-level view of which domains are best represented in the selected sendable data extension.
Sendable Data Extension Performance Over Time	Provides an analysis of a sendable data extension over time. You can use this report to evaluate when a previously effective data extension is no longer effective.
Single Email Performance by Device	Summarizes email open and click activity on mobile vs. desktop devices for an email. This report shows the percentage of opens, unique opens, and clicks occurring on mobile devices.
Spam Complaints Over Time	Provides historical data about received spam complaints.
Subscriber Engagement	Displays which subscribers are most or least engaged with emails.
Subscriber Most Recent Activity	Displays a list of all subscribers and details their most recent open or click activity.
Subscribers Not Sent To	Displays a list of subscribers who haven't received an email during a specified date range.
Triggered Sends Tracking	Displays detailed tracking data for a single triggered send over a custom time frame. ✏️ Note: The overlay option isn't available under the Click Activity tab.
Unengaged Subscribers for a List	Displays which subscribers on a specified list are unresponsive after multiple emails sends.

A/B Test Summary

The A/B Test Summary contains summary and comparison information about one or more A/B test campaigns for the date range you specify.

Account Send Summary

Displays all potential response counts or rates for an account organized by send. Enterprise or Reseller reports also display respective member results organized by account.

Attribute by Tracking Event Report for Email Studio in Analytics Builder

Use the Attribute by Tracking Event Report for Email Studio in Analytics Builder to check how your subscribers reacted to a certain email send. The report lists the subscribers who interacted with an email send during the timeframe you select. Choose a subscriber attribute to include in the report. The report works only with values of the chosen attribute at the time of reporting and not the value at the time of send. For example, use this report to evaluate the effectiveness of a campaign in generating subscriber clicks for men versus women.

Campaign Email Tracking

The Campaign Email Tracking report shows send tracking data for a specific campaign.

Conversion Tracking Statistics

Run this report to compare the effectiveness of links within campaigns or the effectiveness of campaigns in number and value of conversions. This report contains a list of conversions for links included in emails across multiple sends during a time frame.

Email Performance by Attribute Report in Analytics Builder

Run this report to view data for a specific subscriber included in a specific send. This report runs against Legacy List-Based Attributes only and doesn't account for the Sendable DEs field. To display the relevant data, give the Sendable DEs field the same name and ensure that the data is within the Legacy List-Based Attributes.

Email Performance by Domain

This report provides data for the top 10 email domains for an email send. Use this report to analyze how domains responded to a particular email send.

Email Performance by List

This report contains graphics to illustrate Emails Sent by List, Open Rate by List, Bounce Rate by List, and Click Through Rate by List. This report shows only unique opens and clicks. Use this report to analyze which lists responded most favorably to a particular email send.

Email Performance for All Domains

This report shows performance data for each email domain included in sends during a specific period. You can use this analysis identify domains that are bouncing your email so you can begin to resolve the delivery issue.

Email Performance Over Time

This report shows data for all sends during a specific period. You can use this report to evaluate when a previously effective email is no longer effective.

Email Send Performance by Segment

To see performance data by audience segment, use the Email Send Performance in Audience Builder Segment report.

Email Send

Use the Email Send report to view account activity. This report is often used by Agency users for billing their child accounts. Enterprise users can also use this report to view the activity of their Lock and Publish accounts.

Email Sends by User

Learn about the information provided in the Email Sends by User report.

Forwarding Activity Details

Use this report to analyze forwarding activity for your email sends. You can use this report to enable providing incentives to subscribers whose forwarded emails result in new subscribers.

Track Impressions by Job Report for Email Studio

The Impression Tracking by Job report in Analytics Builder is two reports combined into one. The Job Summary section shows overview tracking information. The Impression Tracking Details section lists the different areas of the report that contained impression tracking and contains data for each area. You can only track emails that use dynamic content or AMPscript.

Impression Tracking for Triggered Sends Report in Analytics Builder

Use the Impression Tracking for Triggered Sends report for Email Studio in Marketing Cloud Analytics Builder to monitor triggered sends over a specific time. You can only track emails that use dynamic content or AMPscript.

List Demographics

This report displays the status, subscription method, and domains of the subscribers on a list. Use this report to see what percentage of your subscribers are using a certain domain.

List Performance Over Time

This report provides statistics for all sends to a list during a specified time period.

List Size Over Time Report for Email Studio

To check how your Marketing Cloud Engagement lists grow over time, use the List Size Over Time report in Analytics Builder. Because the data shows first-time events for a status change, data could overlap. Also, more than one event or status can occur with a subscriber in the time period that you define. The report shows you the most recent status change that occurred during the specified time.

Multi-Campaign Email Tracking Summary

This report shows the Email Tracking by campaign, for all campaigns during the selected date range. The report also includes a grand total of all selected campaigns for each tracking category. Use this report to compare the email performance across multiple campaigns.

Recent Email Sending Summary

The Recent Email Sending Summary provides a summary of your account activity over a recent period. You can use this report to confirm that your jobs were completed successfully.

Region Performance for Triggered Sends Over Time

This report shows how a single section of content performs over time across multiple jobs in Triggered Emails.

Region Performance Over Time

The Region Performance Over Time report shows how a single section of content performs over a period across multiple sends. You can use this report to see how a specific link is performing over a certain period. Only emails that contain dynamic content or AMPscript can be tracked in this report.

Response Trend Analysis for an Email Send

Use this report to analyze when subscribers respond to your email relative to when you send it. For example, if you want to send an announcement of an event at a specific time, you can run this report against other sends to determine how far in advance you must send the message to ensure that most your subscribers open it.

Send Classification by Email Tracking

This report shows the send performance data of transactional and commercial sends. Use this report when you want to compare the send performance data of transactional and commercial sends.

Single Email Performance by Device

The Single Email Performance by Device report displays email performance on mobile devices versus desktop devices.

Spam Complaints Over Time

This report provides historical data on the level of spam complaints received.

Subscriber Engagement

Use this report to identify your most engaged subscribers. You could target these subscribers for special offers. This report includes the number of emails that you have sent each subscriber over a specified period, and the number of emails the subscriber has opened or clicked.

Subscriber Most Recent Activity

The Subscriber Most Recent Activity report shows when each subscriber last opened or clicked a message.

Subscribers Not Sent To

This report shows a list of emails for subscribers who weren't included in a send during a time frame that you select.

Triggered Sends Tracking

The Triggered Sends Tracking report contains standard tracking information for a triggered send over a time period. You can use this report to determine the effectiveness of a triggered send in producing opens and clicks and not causing unsubscribes.

Unengaged Subscribers for a List Report

The Unengaged Subscribers report shows a list of inactive subscribers stored in Marketing Cloud Engagement. Use this information to suppress people from certain lists or to clean up your lists.

SEE ALSO:

Email Studio

A/B Test Summary

The A/B Test Summary contains summary and comparison information about one or more A/B test campaigns for the date range you specify.

📝 **Note:** This report cannot be viewed as a webpage. Choose a format for export.

SEE ALSO:

Email Studio Reports in Analytics Builder

Create a Standard Report in Analytics Builder

Account Send Summary

Displays all potential response counts or rates for an account organized by send. Enterprise or Reseller reports also display respective member results organized by account.

This report shows total send and response data for your account. To see the same data differentiated by email send, go to the second page and view the Delivery Log. The Delivery Log lists the same fields as in the Account Send Summary for each send you performed during the time interval you defined. All numeric data relates to the sends that occurred during the defined interval. For example, if there is an ask for yesterday's data, the Open or Click that happened yesterday but relates to a send that occured two days ago is not counted.

Field Name	Description
Client Name	Name of your company
Client ID	Your account ID number
Sends	Number of emails sent from your account during the time interval you defined
Implicit Deliveries	Number of emails that did not receive bounces and are assumed delivered during the time interval you defined
Implicit Delivery Rate	Percentage of delivered emails over bounced emails during the time interval you defined
Overall Bounces	Number of bounces your account has received in the time interval you defined; includes all hard, soft, technical, and unknown bounces.
Overall Bounce Rate	Percentage of emails sent that bounced during the interval you defined
Hard Bounces	Number of hard bounces your account received during the interval you defined
Hard Bounce Rate	Percentage of emails that experienced hard bounces during the interval you defined
Soft Bounces	Number of soft bounces received during the interval you defined
Soft Bounce Rate	Percentage of emails that experienced soft bounces during the interval you defined
Block Bounces	Number of block bounces received during the interval you defined

Field Name	Description
Block Bounce Rate	Percentage of emails that experienced technical bounces during the interval you defined
Technical Bounces	Number of technical bounces received during the interval you defined
Technical Bounce Rate	Percentage of emails that experienced block bounces during the interval you defined
Unknown Bounces	Number of unknown bounces received during the interval you defined
Unknown Bounce Rate	Percentage of emails that experienced unknown bounces during the interval you defined
Unique Opens	Number of unique opens received during the interval you defined. A unique open means one open per person.
Cumulative Opens	Number of opens received during the interval you defined. If one subscriber opened your email multiple times, that number is recorded here.
Open Rate	Percentage of emails opened during the interval you defined. This number is calculated by dividing the Unique Opens by Implicit Deliveries.
Unique Clicks	Number of unique clicks received in the emails sent during the interval you defined; one click per subscriber
Cumulative Clicks	Total number of clicks received in the emails sent during the interval you defined
Click Rate	Percentage of clicks received over the number of subscribers sent to. This number is calculated by dividing The Unique Clicks by the Implicit Deliveries.
Unique Survey Responses	Number of unique responses received from surveys during the interval you defined. Unique responses means one response per person.
Cumulative Survey Responses	Number of responses received from surveys during the interval you defined. If one person responded more than once, that number is recorded here.
Survey Response Rate	Percentage of surveys that received responses during the interval you defined. This number is calculated by dividing Unique Survey Responses by Implicit Deliveries.
Unique Conversions	Unique number of conversions received during the interval you defined; one conversion per subscriber. See Conversion Tracking Statistics for more information.
Cumulative Conversions	Number of conversions received during the interval you defined.

Field Name	Description
Conversion Rate	Percentage of conversions received. This number is calculated by dividing Unique Conversions by Implicit Deliveries.
Unique FTAFs	Number of unique subscribers who clicked the Forward to a Friend icon in your emails during the interval you defined. Unique FTAFs means one click per person.
Cumulative FTAFs	Number of times subscribers clicked the Forward to a Friend icon in your emails during the interval you defined. If one subscriber forwarded the email multiple times, that number is recorded here.
FTAF Rate	Percentage of emails that your subscribers forwarded during the interval you defined.
Unique FTAF Recipients	Number of times your subscribers forwarded your emails to during the interval you defined. For example, if one subscriber clicked the FTAF icon and forward the email to five people, only one instance is recorded here.
Cumulative FTAF Recipients	Number of individuals your subscribers forwarded your emails to during the interval you defined. For example, if one subscriber clicked the FTAF icon and forwarded the email to five people, each of those individuals is recorded here.
FTAF Recipient Rate	Percentage of forwarded emails. This number is calculated by taking the Unique FTAF Recipients number over the Total Delivered.
Unique FTAF Subscribers	Number of individuals who subscribed to your lists as a result of a subscriber clicking the Forward to a Friend icon during the interval you defined.
FTAF Subscriber Rate	Percentage of people who subscribed after receiving the forwarded email as compared to people who did not subscribe. This number is calculated by dividing FTAF Recipient Rate by Implicit Deliveries.
Complaint Deliveries	Number of emails delivered to domains for which complaints were received. For example, if you sent 300 emails to example.com and one of those emails received a spam complaint, the number listed here would be 300.
Unique Complaints	Number of unique spam complaints your account received during the interval you defined; one complaint per subscriber
Cumulative Complaints	Number of spam complaints your account received during the interval you defined. Each time a subscriber complaint, this number increases.
Complaint Rate	Percentage of emails that received spam complaints during the interval you defined.
Unique Unsubscribes	Unique number of unsubscribes received during the interval you defined. Unique unsubscribes means that if one subscriber

Field Name	Description
	unsubscribes from more than one email list, only one instance is recorded here.
Cumulative Unsubscribes	Number of unsubscribes received during the interval you defined.
Unsubscribe Rate	Percentage of subscribers who unsubscribed as compared to people who did not during the interval you defined. This number is calculated by dividing Unique Unsubscribes by Implicit Deliveries.

SEE ALSO:

> Email Studio Reports in Analytics Builder
>
> Create a Standard Report in Analytics Builder

Attribute by Tracking Event Report for Email Studio in Analytics Builder

Use the Attribute by Tracking Event Report for Email Studio in Analytics Builder to check how your subscribers reacted to a certain email send. The report lists the subscribers who interacted with an email send during the timeframe you select. Choose a subscriber attribute to include in the report. The report works only with values of the chosen attribute at the time of reporting and not the value at the time of send. For example, use this report to evaluate the effectiveness of a campaign in generating subscriber clicks for men versus women.

Field Name	Description
Subscriber Key	Unique ID for the subscriber
Tracking Activity	The tracking activity included on the account. Valid values include: • All • Bounce • Open • Click • Unsubscribe
Event Time	Date and time tracking activity occurred
[Attribute]	Subscriber attribute you chose; valid selections include subscriber attributes defined in your account
Default	Default value you set when you created the attribute; if no default value is defined, an asterisk appears.

SEE ALSO:

> Email Studio Reports in Analytics Builder
>
> Create a Standard Report in Analytics Builder

Campaign Email Tracking

The Campaign Email Tracking report shows send tracking data for a specific campaign.

✎ **Note:** Triggered Sends tracking information is not included in this report.

Field Name	Description
Email Name	Name of the email sent to this list
Send Date	Date of the email send
Send	Total number of emails sent
% of Send	Percentage of total emails sent
Opens	Number of emails opened
Open Rate	Percentage of emails opened
Clicks	Total number of email clicks
Click Rate	Percentage of clicks received over the number of subscribers sent to. This number is calculated by dividing The Unique Clicks by the Implicit Deliveries.
Bounces	Total number of emails bounced
Bounce Rate	Percentage of emails sent that bounced
Unsubscribes	Number of emails included in the send that resulted in unsubscribes
Unsubscribe Rate	Percentage of subscribers who unsubscribed as compared to people who did not. This number is calculated by dividing Unique Unsubscribes by Implicit Deliveries.
Shares	Total number of shares the send received
Delivered	Number of successfully delivered emails included in this list
Delivery Rate	Percentage of messages delivered
Conversions	Number of conversions received during the interval you defined

SEE ALSO:

Email Studio Reports in Analytics Builder

Create a Standard Report in Analytics Builder

Conversion Tracking Statistics

Run this report to compare the effectiveness of links within campaigns or the effectiveness of campaigns in number and value of conversions. This report contains a list of conversions for links included in emails across multiple sends during a time frame.

✎ **Note:** Conversion Tracking must be enabled on your account and implemented in the email to use this feature. Contact your account executive to learn more.

Field Name	Description
[Link Name]	Tracking alias of the link
Email Address	Email address of the subscriber whose conversion is tracked
Conversion date and time	Date and time of the conversion
Total	Dollar value of the conversion
Link Total	Total dollar value for the link
Email Total	Total dollar value from the email send
Account Total	Total dollar value for the account

SEE ALSO:

Email Performance by Attribute Report in Analytics Builder

Run this report to view data for a specific subscriber included in a specific send. This report runs against Legacy List-Based Attributes only and doesn't account for the Sendable DEs field. To display the relevant data, give the Sendable DEs field the same name and ensure that the data is within the Legacy List-Based Attributes.

Field Name	Description
Email Name	Name of the email that contains the link
Email Send Date	Date of the send
Attribute Selected	Attribute used as basis on
Attribute Value	Specific value of the attribute

Field Name	Description
Send Count	
% if Send	
Opens	
Open Rate	
Clicks	
Click Rate	

Field Name	Description
	the total subscribers
Bounce	Total number of sends in a domain bubble
Bounce Rate	Percentage of sends in a domain that resulted in a bounce

SEE ALSO:

[Email Studio Reports in Analytics Builder](#)

[Create a Standard Report in Analytics Builder](#)

Email Performance by Domain

This report provides data for the top 10 email domains for an email send. Use this report to analyze how domains responded to a particular email send.

Field Name	Description
Domain Name	Name of the recipient domain for the email send
Emails Sent	Total number of emails sent to the domain
Emails Delivered	Number of emails delivered to the domain
% of Total Send	Percentage of total emails that were sent to the domain
Bounce Rate	Domain bounce rate
Open Rate	Domain open rate
Click Through Rate	Click-through rate for emails sent to the domain
Unsubscribe Rate	Unsubscribe rate for emails sent to the domain

SEE ALSO:

[Email Studio Reports in Analytics Builder](#)

[Create a Standard Report in Analytics Builder](#)

Email Performance by List

This report contains graphics to illustrate Emails Sent by List, Open Rate by List, Bounce Rate by List, and Click Through Rate by List. This report shows only unique opens and clicks. Use this report to analyze which lists responded most favorably to a particular email send.

Field Name	Description
List Name	Name of the list used in the email send
Send Count	Total number of emails sent to the list
% of Total Send	Percentage of total emails that were sent to the list
Bounce Rate	Bounce rate for emails sent to the list
Open Rate	Open rate for emails sent to the list
Click Through Rate	Click-through rate for emails sent to the list
Unsubscribe Rate	Unsubscribe rate for emails sent to the list

SEE ALSO:

Email Studio Reports in Analytics Builder

Create a Standard Report in Analytics Builder

Email Performance for All Domains

This report shows performance data for each email domain included in sends during a specific period. You can use this analysis identify domains that are bouncing your email so you can begin to resolve the delivery issue.

📝 Note: This report only works for standard Email Studio emails. It doesn't work for triggered emails or journey emails.

Field Name	Description
Domain Name	Name of the domain used in the email send
Email Sent	Total number of emails sent to the domain
% of Total Sent	Percentage of total emails sent to the domain
Delivered	Number of delivered emails sent to the domain
Bounce	Number of bounced emails sent to the domain; includes all bounces for all subscribers.
Bounce %	Bounce rate for emails sent to the domain
Opened	Number of opened emails sent to the domain; contains all opens for all subscribers
Open %	Open rate for emails sent to the domain
Clicked	Number of emails sent to the domain that received clicks; includes all clicks for all subscribers
Click %	Click-through rate for emails sent to the domain

Field Name	Description
Unsubscribed	Number of emails sent to the domain that resulted in the recipient unsubscribing; contains all unsubscribes for all subscribers
Unsubscribe Rate	Unsubscribe rate for emails sent to the domain

SEE ALSO:

Email Studio Reports in Analytics Builder

Create a Standard Report in Analytics Builder

Email Performance Over Time

This report shows data for all sends during a specific period. You can use this report to evaluate when a previously effective email is no longer effective.

Field Name	Description
Date and Time Sent	Date and time of the email send
Send Count	Number of emails in the email send
Delivered	Number of emails in the email send that were not undeliverable
Undeliverable	Number of emails in the email send returned as undeliverable
Unique Opens	Number of opened emails in the email send; each email only counted once
Unique Clicks	Number of emails in the email send that were clicked; each email only counted once
Unsubscribes	Number of emails in the email send that resulted in unsubscribes

SEE ALSO:

Email Studio Reports in Analytics Builder

Create a Standard Report in Analytics Builder

Email Send Performance by Segment

To see performance data by audience segment, use the Email Send Performance in Audience Builder Segment report.

The report contains these values.

- Segment Name
- Sends
- Percent of Send
- Opens
- Open Rate
- Clicks

- Click Rate
- Bounces
- Bounce Rate
- Unsubscribes
- Unsubscribe Rate

SEE ALSO:

    Email Studio Reports in Analytics Builder

    Create a Standard Report in Analytics Builder

Email Send

Use the Email Send report to view account activity. This report is often used by Agency users for billing their child accounts. Enterprise users can also use this report to view the activity of their Lock and Publish accounts.

Field Name	Description\
ParentID	Parent account ID
Parent Name	Parent account name
Member ID	Account ID of the child or lock-and-publish account
Member Name	Name of the child or lock-and-publish account
Account Type	Account type of the child or lock-and-publish account
[Interval]	Account activity for the specified interval; for example, if you select Month, an interval column appears for each month in the period the report covers.
Total (all periods)	Total account activity for the time period the report covers
Total [Parent Name] [Interval]	Total activity for the accounts in the time interval
Total [Parent Name] Total (all periods)	Total activity for the accounts for the time period the report covers

SEE ALSO:

    Email Studio Reports in Analytics Builder

    Create a Standard Report in Analytics Builder

Email Sends by User

Learn about the information provided in the Email Sends by User report.

📝 **Note:** You must have administrator permissions to run this report. This report does not contain data for your Lock and Publish accounts.

Field Name	Description
Job ID	ID number of the email send

Field Name	Description
Email Name	Name of content in the email send
Email Subject	Subject line of the email send
Delivered Time	Time of the email send
BCC	Number of blind copies of the email sent in the email send.
Count	Number of emails sent excluding blind copies

SEE ALSO:

Forwarding Activity Details

Use this report to analyze forwarding activity for your email sends. You can use this report to enable providing incentives to subscribers whose forwarded emails result in new subscribers.

Field Name	Description
Forwarding Subscriber	Subscriber who forwarded the email using the Forward-to-a-Friend feature
New Subscriber	If the person who received the forwarded email subscribed to the list as a result, their email address appears in this column.
Time Forwarded	Date and time the message was forwarded
Comments	Comments the subscriber included when forwarding the email using the Forward-to-a-Friend feature

SEE ALSO:

Track Impressions by Job Report for Email Studio

The Impression Tracking by Job report in Analytics Builder is two reports combined into one. The Job Summary section shows overview tracking information. The Impression Tracking Details section lists the different areas of the report that contained impression tracking and contains data for each area. You can only track emails that use dynamic content or AMPscript.

To use this report, enable impression tracking by contacting Salesforce support.

Only admins can run this report.

1. Select and run the report.
2. Be aware of the information in the different sections.

Table 1: Job Summary

Field Name	Description
Event	Occurrence tracked
Unique	Number of unique occurrences per link in the impression region
Total	Total number of occurrences
Percentage	Percentage of Unique Clicks divided by Impression Sent for that region

Table 2: Impression Tracking Details

Field Name	Description
Region Name	Name of impression region you're tracking
Link Name	Name of linked image or text
Impressions Sent	Number of impression regions sent
Unique Clicks	Number of unique clicks a link receives
Total Clicks	Total number of clicks a link receives
Region CTR(Click Through to Read)	Percentage of unique clicks compared to the number of impressions sent

SEE ALSO:

Email Studio Reports in Analytics Builder

Create a Standard Report in Analytics Builder

Impression Tracking for Triggered Sends Report in Analytics Builder

Use the Impression Tracking for Triggered Sends report for Email Studio in Marketing Cloud Analytics Builder to monitor triggered sends over a specific time. You can only track emails that use dynamic content or AMPscript.

📝 **Note:** Only admins can run this report.

The report relies on click and JobURL data. If the dynamic content has no URLs or clicks, the Impression Tracking Details section is empty.

Table 3: Send Summary

Field Name	Description
Event	Occurrence being tracked
Unique	Number of unique occurrences for every event listed. For example, if the Delivered field shows 4, it means that four triggered emails were delivered during the report period.
Total	Total number of occurrences

Field Name	Description
Percentage	Percentage of the event to the total number of delivered emails for the report period

Table 4: Impression Tracking Details

Field Name	Description
Region Name	Name of the impression region tracked
Link Name	Name of the linked image or text
Impressions Sent	Number of impression regions that were sent
Unique Clicks	Number of unique clicks a link receives
Total Clicks	Total number of clicks a link receives
Region CTR (Click Through to Read)	Percentage of unique clicks compared to the number of impressions sent

SEE ALSO:

    Email Studio Reports in Analytics Builder

    Create a Standard Report in Analytics Builder

List Demographics

This report displays the status, subscription method, and domains of the subscribers on a list. Use this report to see what percentage of your subscribers are using a certain domain.

Field Name	Description
Status	Number of subscribers in each status
Count	Number of unsubscribed or deleted subscribers
Percent	Percentage of unsubscribed or deleted subscribers

SEE ALSO:

    Email Studio Reports in Analytics Builder

    Create a Standard Report in Analytics Builder

List Performance Over Time

This report provides statistics for all sends to a list during a specified time period.

Field Name	Description
Email Name	Name of the email sent to this list

Field Name	Description
Date and Time Sent	Date and time the email was sent to this list
Send Count	Number of emails included in the send to the list
Delivered	Number of successfully delivered emails included in this list
Unique Opens	Number of opened emails included in the send; each email is only counted once
Unique Clicks	Number of clicked emails included in the send; each email is only counted once
Unsubscribes	Number of emails included in the send that resulted in unsubscribes

SEE ALSO:

Email Studio Reports in Analytics Builder

Create a Standard Report in Analytics Builder

List Size Over Time Report for Email Studio

To check how your Marketing Cloud Engagement lists grow over time, use the List Size Over Time report in Analytics Builder. Because the data shows first-time events for a status change, data could overlap. Also, more than one event or status can occur with a subscriber in the time period that you define. The report shows you the most recent status change that occurred during the specified time.

> 💡 Tip: The accuracy of this report improves over longer periods. We recommend using it to measure list growth over a period of 1 month or longer.

A full inbox could cause a subscriber to move in and out of the Bounced and Held statuses.

When you create the report, you can select all subscribers, my list, or my groups. For the Child business unit, the All Subscribers option isn't available when creating the report. Enable All Subscribers Access to use the options for a Child business unit.

Field Name	Description
Added	Subscribers added for the report period
Bounced	Subscribers who experienced a bounce for the first time during the report period
Undeliverable	Subscribers whose email address was marked as Undeliverable during the report period
Unsubscribed	Subscribers who opted out of the list during the report period
Active	Number of subscribers in the list that aren't in a status of Bounced, Undeliverable, or Unsubscribed at the end of the report period

You can't reconcile counts by adding or subtracting Added, Bounced, Undeliverable, and Unsubscribe counts to a previous Active total to match a newer Active total.

Multi-Campaign Email Tracking Summary

This report shows the Email Tracking by campaign, for all campaigns during the selected date range. The report also includes a grand total of all selected campaigns for each tracking category. Use this report to compare the email performance across multiple campaigns.

Field Name	Description
Campaign Name	Name of the campaign to which the emails belong
Campaign Description	Description of the campaign
Deployment Date	Campaign start date
Campaign Owner	Person managing the campaign
Send Count	Total emails send as part of this campaign
% of Send	Percentage of total emails sent
Opens	Number of emails opened

Recent Email Sending Summary

The Recent Email Sending Summary provides a summary of your account activity over a recent period. You can use this report to confirm that your jobs were completed successfully.

Field Name	Description
Job ID	Email send ID
Name	Name of email content in this email send
Subject	Subject line of this email send
Send Start Time	Date and time the email send started
Send Complete Time	Date and time the email send was completed
Emails Sent	Number of emails included in the email send
Emails Delivered	Number of emails not returned as undeliverable; calculated by subtracting the Undeliverable value from the Emails Sent value.

Field Name	Description
Undeliverable	Number of bounced emails
Survey Responses	Number of survey responses
Total Click Throughs	Number of resulting clicks; includes multiple clicks by the same subscriber
Unique Click Throughs	Number of emails clicked in this email send; includes a click by each subscriber only once
Unique Emails Opened	Number of emails opened in this email send; includes each email only once per subscriber
Unsubscribes	Number of unsubscribes from this email send
FTAF Forwarders	Number of subscribers who forwarded the email at least once
FTAF Recipients	Number of recipients who received the forwarded email
FTAF Subscribers	Number of recipients who subscribed to a list in response to receiving a forwarded email
Open Rate	Percentage of Emails Delivered that were Emails Opened
Deliverability Rate	Percentage of Emails Delivered
Bounce Rate	Percentage of Emails Delivered that were Emails Bounced
Unsubscribe Rate	Percentage of Emails Delivered that were Unsubscribes
Unique Click Through Rate	Percentage of Emails Delivered that resulted in Unique Click Throughs
Unique Complaints	Number of complaints the email send received; includes one complaint per subscriber.
Cumulative Complaints	Number of spam complaints this email send received; if one subscriber sent more than one complaint, that number is included here.

SEE ALSO:

Email Studio Reports in Analytics Builder

Create a Standard Report in Analytics Builder

Region Performance for Triggered Sends Over Time

This report shows how a single section of content performs over time across multiple jobs in Triggered Emails.

📝 **Note:** You must be an administrator to run this report.

Field Name	Description
Performance by Link in Region	Region the report is tracking

Field Name	Description
Link Alias or URL	Link in the region that is being tracked. You specify the Link Alias when you create the link in the email. The URL appears if you don't specify a link alias.
Triggered Send	Name of the send that was triggered
Impressions Sent	Number of links that were sent in an email send using dynamic content
Unique Clicks	Number of recipients who clicked the link
Total Clicks	Total number of clicks on the link. Multiple clicks from the same subscriber are counted.
Click Percentage	Percentage of Unique Clicks divided by Impression Sent

👁 **Example:** Twelve subscribers subscribed to Northern Trails' email list in May. Northern Trails wants to track how a link in the welcome email that was sent automatically performed for all 12 subscribers. They ran a Region Performance for Triggered Sends Over Time report and saw how the link performed in each individual email and its overall performance.

SEE ALSO:
Email Studio Reports in Analytics Builder
Create a Standard Report in Analytics Builder

Region Performance Over Time

The Region Performance Over Time report shows how a single section of content performs over a period across multiple sends. You can use this report to see how a specific link is performing over a certain period. Only emails that contain dynamic content or AMPscript can be tracked in this report.

📝 **Note:** You must be an administrator to run this report.

Field Name	Description
Performance by Link in Region	Region tracked in this report
Link Alias or URL	The link in the region that is being tracked. You specify the Link Alias when you create the link in the email. The URL only appears if you do not specify a link alias.
Job ID	ID of the email send
Send Date	Date and time of email send
Impressions Sent	Number of links that were sent in an email send using dynamic content
Unique Clicks	Number of recipients who clicked the link
Total Clicks	Total number of clicks on the link; multiple clicks from the same subscriber are counted.

Field Name	Description
Click Percentage	Percentage of Unique Clicks divided by Impression Sent

SEE ALSO:

> Email Studio Reports in Analytics Builder
>
> Create a Standard Report in Analytics Builder

Response Trend Analysis for an Email Send

Use this report to analyze when subscribers respond to your email relative to when you send it. For example, if you want to send an announcement of an event at a specific time, you can run this report against other sends to determine how far in advance you must send the message to ensure that most your subscribers open it.

Field Name	Description
Interval Start Time	Interval, selected by you, into which the responses are divided on the report
Sent	Number of emails sent during this interval; the gray column is a cumulative total of emails sent for all intervals to that point
Bounced	Number of emails bounced during this interval; the gray column is the cumulative total of bounces for all intervals to that point
Unique Opened	Number of subscribers who opened the email during this interval; the gray column contains the cumulative total of opens for all intervals to that point. These values count only the first time a subscriber opens an email.
Opened	Number of emails opened during this interval; the gray column contains the cumulative total opens for all intervals to that point. These values count all opens of the email.
Unique Clicked	Number of emails clicked during this interval; the gray column contains the cumulative total of clicks for all intervals to that point. These values count only one click per email.
Clicked	Number of email clicks during this interval; the gray column contains the cumulative total of clicks for all intervals to that point. These values count all clicks in the email.
Unsubscribes	Number of unsubscribes from the email during this interval; the gray column contains the cumulative total of unsubscribes for all intervals to that point.

SEE ALSO:

> Email Studio Reports in Analytics Builder
>
> Create a Standard Report in Analytics Builder

Send Classification by Email Tracking

This report shows the send performance data of transactional and commercial sends. Use this report when you want to compare the send performance data of transactional and commercial sends.

Field Name	Description
Send Classification	Indicates whether the send was transactional or commercial
Email Name	Name of the email sent to this list
Sent	Total number of emails sent during this interval
% of Send	Percentage of total emails sent
Opens	Number of emails opened during this interval
Open Rate	Percentage of emails opened during the interval you defined; this number is calculated by dividing the Unique Opens by Implicit Deliveries.
Clicks	Total number of email clicks during this interval
Click Rate	Percentage of clicks received over the number of subscribers sent to. This number is calculated by dividing The Unique Clicks by the Implicit Deliveries.
Bounces	Total number of emails bounced during this interval
Bounce Rates	Percentage of emails sent that bounced during the interval you defined
Unsubs	Number of emails included in the send that resulted in unsubscribes
Unsub Rates	Percentage of subscribers who unsubscribed as compared to people who did not during the interval you defined. This number is calculated by dividing Unique Unsubscribes by Implicit Deliveries.
Shares	Total number of shares the send received
Delivered	Number of successfully delivered emails included in this list
Delivery Rate	Percentage of messages delivered
Conversions	Number of conversions received during the interval you defined

SEE ALSO:

Email Studio Reports in Analytics Builder

Create a Standard Report in Analytics Builder

Single Email Performance by Device

The Single Email Performance by Device report displays email performance on mobile devices versus desktop devices.

Field name	Description
Send Date	Date of the email send
Sent	Number of emails sent
Desktop Opens	Number of times the email was opened on a desktop device
Mobile Opens	Number of times the email was opened on a mobile device
Desktop Unique Opens	Number of unique subscribers who opened the email on a desktop device
Mobile Unique Opens	Number of unique subscribers who opened the email on a mobile device
Desktop Clicks	Number of clicks an email link received from a desktop device. Multiple clicks from the same subscriber are counted.
Mobile Clicks	Number of clicks for an email from a mobile device. Multiple clicks from the same subscriber are counted

SEE ALSO:

Email Studio Reports in Analytics Builder

Create a Standard Report in Analytics Builder

Spam Complaints Over Time

This report provides historical data on the level of spam complaints received.

> **Note:** This is not a deliverability report and does not display the number of emails sent for domains that had no complaints recorded. If an email domain does not return any spam complaints during the time period you specified, no entry for that domain is shown.

The pie chart displays the top domains for spam complaints received. You can configure how many domains you want to display in the pie chart when you run the report.

This report is divided into time intervals, with both the send and the complaint bucketed into the period during which the send occurred.

Field Name	Description
Sends	Number of emails sent to the ISP.
Complaints	Number of spam complaints from the ISP.
Rate	Percentage of emails sent that resulted in spam complaints

The report also contains thresholds used by some of the ISPs to determine when to block your emails. If your spam complaint rate is greater than the threshold value for the ISP, the ISP could block your email sends.

> **Note:** Values for aol.com, msn.com, hotmail.com, and yahoo.com appear in green, which indicates the bounce percentage is within the accepted range for those domains. If the value exceeds that range, the numbers are red.

Spam Complaint Bucketing

Learn how Spam Complaint Bucketing for email sends works in the Reports tool.

Spam Complaint Bucketing

Learn how Spam Complaint Bucketing for email sends works in the Reports tool.

Your spam complaint rate is calculated by dividing the number of complaints received per day by the number of subscribers who received your message. The spam complaint bucketing process provides a more accurate view of spam complaint rates; particularly when displaying data breakdown by day.

👁 **Example:** Suppose that you send an email to 10 subscribers on Tuesday. You receive no complaints about that email on Tuesday. However, you get one complaint on Wednesday and one on Thursday. If you look in the tracking section of the application, you see one complaint recorded for Wednesday and one for Thursday. However, when you run this report, you see that the two complaints are attributed to the send on Tuesday. This works out to a 20 percent complaint rate because all complaints are bucketed with the sends.

If the send and complaints fell into different buckets your complaint rate would be negatively impacted. In the prior example, if you send to 10 subscribers on Tuesday and receive no complaints that day, your complaint rate for Tuesday is zero. However, with one complaint received on Wednesday and one on Thursday, your complaint rate for those days would be greater than 100%.

Subscriber Engagement

Use this report to identify your most engaged subscribers. You could target these subscribers for special offers. This report includes the number of emails that you have sent each subscriber over a specified period, and the number of emails the subscriber has opened or clicked.

📝 **Note:** You can specify the percentage of subscribers to include in this report based on the highest click-to-sent ratio. You can also limit the report to include only subscribers to whom you have sent a minimum number of emails.

Field Name	Description
Email Address	Subscriber's email address
Delivered	Number of emails sent to the subscriber over the time period of the report
Clicked On	Number of the Delivered emails in which the subscriber clicked a link, regardless of whether the click occurred over the time period of the report
Clicked to Delivered Ratio	Percentage of Delivered emails Clicked On
Opened	Number of Delivered emails the subscriber opened, regardless of whether the open occurred over the time period of the report

Field Name	Description
Opened to Delivered Ratio	Percentage of Delivered emails that were Opened

SEE ALSO:

Email Studio Reports in Analytics Builder

Create a Standard Report in Analytics Builder

Subscriber Most Recent Activity

The Subscriber Most Recent Activity report shows when each subscriber last opened or clicked a message.

Field Name	Description
Email Address	Subscriber's email address
Last Open Time	Date and time the subscriber last opened an email from you
Last Click Time	Date and time the subscriber last clicked in an email from you

SEE ALSO:

Email Studio Reports in Analytics Builder

Create a Standard Report in Analytics Builder

Subscribers Not Sent To

This report shows a list of emails for subscribers who weren't included in a send during a time frame that you select.

You can use the results from this report to create a list to send a message to subscribers who weren't included in your group sends. For example, this report can be used to identify subscribers and resend to them if their address had a soft bounce. Soft bounces are due to a temporary condition, such as a full inbox.

SEE ALSO:

Email Studio Reports in Analytics Builder

Bounce Mail Management in Email Studio

Create a Standard Report in Analytics Builder

Triggered Sends Tracking

The Triggered Sends Tracking report contains standard tracking information for a triggered send over a time period. You can use this report to determine the effectiveness of a triggered send in producing opens and clicks and not causing unsubscribes.

Field Name	Description
Period	Window of time in which a send was triggered
Sends	Number of sends triggered during the period
Deliveries	Number of sends triggered during the Period that did not bounce

Field Name	Description
Delivery Rate	Percentage of sends triggered during the Period that did not bounce
Total Bounces	Number of sends triggered during the Period that bounced
Bounce Rate	Percentage of sends triggered during the Period that bounced
Unique Opens	Number of sends triggered during the Period that were opened; includes only the first time the email was opened
Open Rate	Percentage of sends triggered during the Period that were opened
Cumulative Opens	Total number of opens for sends triggered during the period; includes multiple opens from the same subscriber
Unique Clicks	Number of sends triggered during the Period that were clicked; includes only the first time the email was clicked
Click Rate	Percentage of the sends triggered during the Period that were clicked
Cumulative Click	Total number of clicks for sends triggered during the period; includes multiple clicks from the same subscriber
Unique Unsubscribes	Number of sends triggered during the Period that resulted in an unsubscribe; includes only the first instance of unsubscribe
Unsubscribe Rate	Percentage of the sends triggered during the Period resulting in an unsubscribe
Cumulative Unsubscribe	Total number of unsubscribes from sends triggered during the period; includes unsubscribes through multiple channels for the same subscriber. For example, if a subscriber both clicks the one-click unsubscribe link and sends a spam complaint, this value counts two unsubscribes for the triggered send.

SEE ALSO:

Email Studio Reports in Analytics Builder

Create a Standard Report in Analytics Builder

Unengaged Subscribers for a List Report

The Unengaged Subscribers report shows a list of inactive subscribers stored in Marketing Cloud Engagement. Use this information to suppress people from certain lists or to clean up your lists.

Consider removing subscribers that appear in this report or asking them if they still want to receive your email communications.

This report includes all the statistics for the subscribers on the list, regardless of where the statistics originate. If a subscriber is on two lists, the tracking for both lists appears on this report.

The report can take several minutes to render. The report stops running if it has been active for more than 3 hours.

Field name	Description
Email Address	Subscriber's email address.
Delivered	Number of emails that arrive in the subscriber's inbox.
Opens	Number of emails that the subscriber has opened.
Clicks	Number of clicks a subscriber makes in an opened email.

SEE ALSO:

Email Studio Reports in Analytics Builder

Create a Standard Report in Analytics Builder

Journey Builder Reports

View a list and description of Journey Builder reports available in the Reports tool.

Report Name	Description
Journey Builder Email Send Summary	Tracking and engagement metrics for emails sent in journeys over a specified time frame. Choose specific journeys and versions to include in the report.
Journey Builder Email Send Summary by Day	Tracking and engagement metrics for emails sent in journeys, aggregated by day, for a specified time frame, along with specific journeys and versions to include in the report.

Journey Builder Email Send Summary

Create this report in The Reports tool to view tracking and engagement metrics for emails sent in journeys over a specified time frame. Choose specific journeys and versions to include in the report.

Journey Builder Email Sends by Day

Create the Journey Builder Email Sends by Day report in the Reports tool. View tracking and engagement metrics for emails sent in journeys, aggregated by day, for a specified time frame, along with specific journeys and versions to include in the report.

SEE ALSO:

Journeys and Messages

Journey Builder Email Send Summary

Create this report in The Reports tool to view tracking and engagement metrics for emails sent in journeys over a specified time frame. Choose specific journeys and versions to include in the report.

Note: This report cannot be viewed as a webpage. Select another method of delivery such as email or FTP.

1. Choose **Reports** in Analytics Builder.
2. Choose Journey Builder from the Report Catalog.
3. Click **Create**.

4. Select report parameters.

5. Click **Submit**.

6. Choose the delivery option.

7. Click **Save**.

SEE ALSO:

    Journey Builder Reports

    Create a Standard Report in Analytics Builder

Journey Builder Email Sends by Day

Create the Journey Builder Email Sends by Day report in the Reports tool. View tracking and engagement metrics for emails sent in journeys, aggregated by day, for a specified time frame, along with specific journeys and versions to include in the report.

> 📝 **Note:** This report cannot be viewed as a webpage.

1. Select **Reports** in Analytics Builder.

2. Select the Journey Builder from the Report Catalog.

3. Click **Create**.

4. Select the report parameters.

5. Click **Submit**.

6. Select the delivery option.

7. Click **Save**.

SEE ALSO:

    Journey Builder Reports

    Create a Standard Report in Analytics Builder

Mobile Studio Reports

View a list and description of Mobile Studio reports available in the Reports tool.

Report Name	Description
GroupConnect LINE Outbound Message	Provides a summary of outbound messages sent to LINE followers, including the delivered message count.
GroupConnect LINE Triggered Sends Summary	Shows how many people you sent a follow or response message to.
Mobile Chat Messaging Journey Builder Activity Summary Report	Displays all Journey Builder activity related to LINE message sends.
Mobile Chat Messaging Summary Report	Displays all chat messaging API send activities for LINE and Facebook Messenger.
Push Account Summary	Displays an account summary of MobilePush messages.

Report Name	Description
Push Message Detailed Report	Displays detailed tracking information for all push messages sent from a MobilePush account including message description and individual-level send status.
Push Message Summary	Provides content and overall tracking information for all push messages sent through a specific app.
Carrier Deactivation Summary Report	Use this report to both verify the accuracy of the opt-out process and insight into customers to potentially retarget for SMS opt-in. The report displays a daily and historic overview of the subscriptions updated within your account. The updates are a result of deactivated phone numbers on the carrier's network or numbers ported from one carrier to another.
SMS Account Summary	Displays a summary of activity at an account level; including a total number of opted-in subscribers and counts of inbound and outbound messages.
SMS Message Detailed Report	Shows the detailed tracking information about messages sent, including descriptive information about the message and send status at an individual level.
SMS Message Summary	Shows the activity summaries for all keywords in an account, including overall tracking information and message content for each keyword.

GroupConnect LINE Outbound Message

View the success of a list send in the LINE Outbound Message report in the Reports tool. This report displays a summary of outbound messages sent to LINE followers, including the delivered message count. Select a date range, whether to include child accounts,

GroupConnect LINE Triggered Sends Summary

View how many people you sent a follow or response message to in the LINE Triggered Sends Summary report in the Reports tool. Select a date range, whether to include child accounts, the time zone, and the culture code.

Mobile Chat Messaging Journey Builder Activity Summary Report

View your LINE Journey Builder message sends report using this report available in the Reports tool. This report displays LINE message sends created in Journey Builder using a LINE activity. You can see your message type and name, audience size, and number of successfully delivered messages.

Mobile Chat Messaging Summary Report

View the success of your chat messaging API message sends with this report accessible in the Reports tool. This report displays API messages sent to LINE and Facebook Messenger followers, including the last status and message sends, errors, and error definitions. With this report, you can filter by a date range, whether to include child accounts, final status, platform, or content type.

Push Account Summary

Learn about the information presented in the MobilePush Account Summary report in the Reports tool.

Push Message Detail

Learn about the information presented in the Push Message Detail report in Marketing Cloud Engagement.

Push Message Summary

Learn about the information included in the MobilePush Message Summary report in the Reports tool.

Carrier Deactivation SMS Summary

The Carrier Deactivation SMS Summary displays a daily and historic overview of the subscriptions updated in your account. This standard report is available for US short codes in MobileConnect. The report shows an overview up to the 90 days from when the report was created.

SMS Account Summary

The SMS Account Summary report is a summary of all activity at the account level. It includes the number of opted-in subscribers and the number of inbound and outbound messages.

SMS Message Detail

This page describes information found in the SMS Message Detail report.

SMS Message Summary Report

The SMS Message Summary Report, in the Reports tool, provides activity summaries for keywords in an account. Also included is overall tracking information and message content for each keyword.

SMS Link Clicks Report

The SMS Link Clicks report includes this information.

GroupConnect LINE Outbound Message

View the success of a list send in the LINE Outbound Message report in the Reports tool. This report displays a summary of outbound messages sent to LINE followers, including the delivered message count. Select a date range, whether to include child accounts,

📝 **Note:** The MessageID and JobID values on the report output are useful if you contact Support about a send.

SEE ALSO:

Mobile Studio Reports

Create a Standard Report in Analytics Builder

GroupConnect LINE Triggered Sends Summary

View how many people you sent a follow or response message to in the LINE Triggered Sends Summary report in the Reports tool. Select a date range, whether to include child accounts, the time zone, and the culture code.

📝 **Note:** The MessageID and JobID values on the report output are useful if you contact Support about a send.

SEE ALSO:

Mobile Studio Reports

Messages Types in GroupConnect

Create a Standard Report in Analytics Builder

Mobile Chat Messaging Journey Builder Activity Summary Report

View your LINE Journey Builder message sends report using this report available in the Reports tool. This report displays LINE message sends created in Journey Builder using a LINE activity. You can see your message type and name, audience size, and number of successfully delivered messages.

Mobile Chat Messaging Summary Report

View the success of your chat messaging API message sends with this report accessible in the Reports tool. This report displays API messages sent to LINE and Facebook Messenger followers, including the last status and message sends, errors, and error definitions. With this report, you can filter by a date range, whether to include child accounts, final status, platform, or content type.

Push Account Summary

Learn about the information presented in the MobilePush Account Summary report in the Reports tool.

Field Name	Variable	Definition
Contacts	Opt-Out	Number of contacts that have opted out during this time period
	Opt-In	Number of contacts that have opted in during this time period
Message Count by Send Type	Outbound Total	Number of messages sent during this time period (same as Sent under Outbound Message Tracking)
	Scheduled	Number of scheduled messages sent
	Automation	Number of automated messages sent
	API Trigger	Total number of API triggered messages
Outbound Message Tracking	Sent	Number of messages sent during this time period (same as Outbound Total under Message Count by Send Type)
	Opened	Percentage of messages opened
	Undeliverable	Percentage of messages that were undeliverable
Message Count by Campaign		Number of messages sent in each campaign, listed by Campaign Name
Campaign Name		Name of a campaign that sent messages during this time period
Message Count by App		Number of messages sent per app, listed by App Name
App Name		Name of the app that sent messages during this time
Average Time in App	Average Time In App with Push-Enabled	Average amount of time spent in the app per user who has opted in to push notifications

Field Name	Variable	Definition
	Average Time in App without Push-Enabled	Average amount of time spent in the app per user who has not opted in to push notifications

SEE ALSO:

Mobile Studio Reports

Create a Standard Report in Analytics Builder

Push Message Detail

Learn about the information presented in the Push Message Detail report in Marketing Cloud Engagement.

Field Name	Description
Date	Date the report was run
ClientID	Business Unit ID or Member ID number for the sent message
EID	Enterprise ID number for the sent message
AppName	Name of the mobile app message was sent to; configured in MobilePush Administration
MessageName	Name of the message sent. This field is populated by the name of the Push Activity in Journey Builder.
MessageID	ID number of the sent message
Template	Template of the sent message: Outbound, Location Entry, Location Exit, or Beacon
Format	Format of the sent message: Application Alert or Application Alert & Landing Page
GeofenceName	Names of all geofence locations associated with the message
PageName	Subject field of the CloudPage that is associated with the message
Campaigns	Name of the campaign associated with the sent message
DeviceID	ID of the device that received the message. The Device ID is a unique identifier assigned to a specific mobile device owned by a contact.
ContactKey	ID of the contact that owns the device that received the message but not the ID of the device; one contact could have multiple devices. The ContactKey matches the Contacts and Devices ID. The ContactKey indicates the subscriber associated with the device when the report is run.

Field Name	Description
DateTimeSend	Date and time, in UTC-6, that the message was sent
MessageContent	Content of the message. This field shows AMPscript, if used.
MessageOpened	Whether the message was opened on the device corresponding to the Device ID
OpenDate	When the message was opened
TimeInApp	How many seconds the user spent in the app after opening the message. Measured from the time the subscriber opens the app to the time the app goes into the background.
Platform	Operating system of the device
PlatformVersion	Version of the operating system
Status	Status of the send job at the device level. This field tells you whether the job succeeded or failed for the device.
	Expected values are Success, Failed, and Blank only if there's no returned data on the send.
PushJobID	ID of the job to use when troubleshooting with support
SystemToken	Unique key that is used by Google or Apple to identify the device for sending
InboxDownload	Date and time the message was downloaded
InboxOpen	Date and time Inbox was opened
IosMediaUrl	Media URL for devices using an Apple operating system
AndroidMediaUrl	Media URL for devices using an Android operating system
MediaAlt	Alt text for media
RequestID	The unique identifier for every request

For more details about error counts, visit the Google Cloud Messaging site and look for Downstream message error response codes.

SEE ALSO:

> Mobile Studio Reports
>
> Create a Standard Report in Analytics Builder
>
> Contacts and Devices

Push Message Summary

Learn about the information included in the MobilePush Message Summary report in the Reports tool.

Field Name	Variable	Definition
App Name		Name of the mobile app that the message was sent to. Configured in MobilePush Administration.
Message Name		Name of the sent message
Message ID		ID number of the sent message
Template		Template of the sent message: Outbound, Inbox, Location Entry, Location Exit, or Beacon
Format		Format of the sent message: Alert, Alert + Inbox, or Inbox Only
Location		Location where the message was triggered
Page		Subject field of the cloud page that is associated with the message
Campaign		Campaign associated with the message
DateTime Sent		Date and time, in UTC-6, that the message was sent
Message		Content of the message. This field shows AMPscript, if used.
Title		Title of the message (optional)
Subtitle		Subtitle of the message (optional)
Total	Sent	Number of messages sent through the app
	Opened	Number of messages opened
	Open%	Percentage of messages opened
	Time in App Total	Time that users spent in the app after opening the message. Displayed as HH:MM:SS
	Time in App Avg	Average amount of time per user spent in the app after opening the message. Displayed as HH:MM:SS
	Inbox Downloads	Number of messages downloaded on a device
iOS Media	Sent	Number of messages sent through the app that reached an iOS device
	Inbox Opens	Number of messages opened on an iOS device

Field Name	Variable	Definition
	Inbox Open%	Percentage of messages opened on an iOS device
	Time in App Total	Time that iOS users spent in the app after opening the message. Displayed as HH:MM:SS
	Time in App Avg	Average amount of time per iOS user spent in the app after opening the message. Displayed as HH:MM:SS
	Inbox downloads	Number of messages downloaded on an iOS device
Android Media	Sent	Number of messages sent through the app that reached an Android device
	Inbox Opens	Number of messages opened on an Android device
	Inbox Open%	Percentage of messages opened on an Android device
	Time in App Total	Time that Android users spent in the app after opening the message. Displayed as HH:MM:SS
	Time in App Avg	Average amount of time per Android user spent in the app after opening the message. Displayed as HH:MM:SS
	Inbox downloads	Number of messages downloaded on an Android device
Message Failure	Failed	Number of messages that failed
	Failed%	Percentage of messages that failed

SEE ALSO:

Mobile Studio Reports

Create a Standard Report in Analytics Builder

Carrier Deactivation SMS Summary

The Carrier Deactivation SMS Summary displays a daily and historic overview of the subscriptions updated in your account. This standard report is available for US short codes in MobileConnect. The report shows an overview up to the 90 days from when the report was created.

Some wireless carriers in the United States produce daily files that track phone numbers that have been deactivated or ported to another carrier. For these phone numbers, Marketing Cloud Engagement changes the status to Opted-Out.

To find out when a carrier's deactivation files are processed, contact your account executive.

SMS Account Summary

The SMS Account Summary report is a summary of all activity at the account level. It includes the number of opted-in subscribers and the number of inbound and outbound messages.

To refine your results, provide a date range and select whether to include children accounts or charts in the report.

SMS Message Detail

This page describes information found in the SMS Message Detail report.

Field Name	Description
Date	Date the message was sent
EID	Enterprise ID number for the sender
ClientID	Business Unit ID number for the sender
MessageName	Name of the message sent
MessageType	Type of message sent
CampaignName	Name of the campaign associated with the message sent
MessageOrigin	Origin of the sent message
MessageText	Text included in the message sent
MobileNumber	Mobile number associated with the sender
IsoCountryCode	ISO country code of the message sent
ShortCode	Short-code associated with the sent message
Status	Status of the sent message. The message is either Delivered or Undelivered.
MobileMessageTrackingID	Unique ID for tracking information related to the sent message

Field Name	Description
SubscriberKey	Unique ID for the subscriber

SEE ALSO:

Mobile Studio Reports

Create a Standard Report in Analytics Builder

SMS Message Summary Report

The SMS Message Summary Report, in the Reports tool, provides activity summaries for keywords in an account. Also included is overall tracking information and message content for each keyword.

> **Note:** SMS messages created in Content Builder only show in the SMS Message Detail report.

Enter a date range and select whether to include children accounts in the report.

Field Name	Description
MessageName	Name of the message sent
MessageType	Type of message sent
CampaignName	Name of the campaign associated with the message sent
MessageOrigin	Origin of the sent message
ShortCode	Short-code associated with the sent message
Date	Day the message was scheduled or activated

SEE ALSO:

Mobile Studio Reports

Create a Standard Report in Analytics Builder

SMS Link Clicks Report

The SMS Link Clicks report includes this information.

Field Name	Description
EID	The Enterprise ID number of the sender
ClientID	The business unit ID number for the sender
SmsJobId	A unique identifier for each SMS job triggered in MobileConnect
SmsBatchId	The batch associated with an SMS sends
SubscriberId	A unique ID for the subscriber
OriginalURL	The web address that was sent in the message before shortening the URL

Field Name	Description
FirstClickDateUTC	The date that the URL was first clicked
TotalClicks	The total number of times the URL was clicked
SendDate	The date the message was sent
MessageName	The name of the message sent
MessageType	The type of message sent
CampaignName	The name of the campaign associated with the message sent
MobileNumber	The mobile number associated with the sender
ShortCode	The short code associated with the sent message
JourneyDefinitionId	A unique identifier for the journey that the message was deployed from
JourneyActivityId	A unique identifier for the journey activity that the message was deployed from

Analytics Builder Reports Frequently Asked Questions

Get the answers to frequently asked questions about the standard reports in Analytics Builder for Marketing Cloud Engagement.

Who Can Access Reports?

By default, every Marketing Cloud Engagement user can access the reports that relate to channels that the user has permission to work with. For example, if Email Studio is enabled but MobileConnect isn't, the user can access only Email Studio reports. An admin can edit the permission model.

Can I Schedule a Report?

Yes. You can schedule any standard Analytics Builder report to run at specified dates and times. When scheduling end dates, don't enter a date after the year 2077.

Can I Create Custom Reports in Analytics Builder?

To create a custom report in Analytics Builder, first enable the Discover reporting tool. Contact your account executive for more information.

Can a Report Owner Give Read/Write Access to Others for Report they've created and saved?

No. You can't share permissions for a report created within Analytics Builder. However, a different user can access a report and perform a Save As to create a copy. Report ownership can't be transferred from one user to another.

Does Analytics Builder Include Reports for Every Channel?

Yes. All the channel reports are accessible from the reports catalog.

Do I Have to Set Permissions to Access Reports I have Email Studio?

Yes, you must set permissions in Reports for each user.

Which Languages Are Supported?

Reports are available in all the languages that Marketing Cloud Engagement supports.

Are There Changes to the External APIs?

There are no changes to the external APIs.

Which Email Editions Are Supported?

All email editions have access to Analytics Builder reports.

Can I Save a Report?

Yes. You can save, retrieve, and rerun reports in Analytics Builder.

Can I Search for a Specific Report?

Yes. In Analytics Builder, open Reports and search by name or use filters to locate a report.

Are Analytics Builder Reports Available for Every Email Edition?

Yes. Standard reports are available for all Email Studio editions.

Who Can Access Reports?

By default, every Marketing Cloud Engagement user can access the reports that relate to channels that the user has permission to work with. For example, if Email Studio is enabled but MobileConnect isn't, the user can access only Email Studio reports. An admin can edit the permission model.

Can I Schedule a Report?

Yes. You can schedule any standard Analytics Builder report to run at specified dates and times. When scheduling end dates, don't enter a date after the year 2077.

👁 **Example:** To schedule the report that you created, open the report, and select **Edit** in the Schedule Options section.

Select the start date and time, the time zone, and the send frequency. You can run a report one time, hourly, daily, weekdays, weekly, or monthly. Finally, choose your preferred delivery file format and location.

Can I Create Custom Reports in Analytics Builder?

To create a custom report in Analytics Builder, first enable the Discover reporting tool. Contact your account executive for more information.

Can a Report Owner Give Read/Write Access to Others for Report they've created and saved?

No. You can't share permissions for a report created within Analytics Builder. However, a different user can access a report and perform a Save As to create a copy. Report ownership can't be transferred from one user to another.

Does Analytics Builder Include Reports for Every Channel?

Yes. All the channel reports are accessible from the reports catalog.

Do I Have to Set Permissions to Access Reports I have Email Studio?

Yes, you must set permissions in Reports for each user.

Which Languages Are Supported?

Reports are available in all the languages that Marketing Cloud Engagement supports.

SEE ALSO:

Marketing Cloud Account Culture Code

Are There Changes to the External APIs?

There are no changes to the external APIs.

Which Email Editions Are Supported?

All email editions have access to Analytics Builder reports.

Can I Save a Report?

Yes. You can save, retrieve, and rerun reports in Analytics Builder.

Can I Search for a Specific Report?

Yes. In Analytics Builder, open Reports and search by name or use filters to locate a report.

Are Analytics Builder Reports Available for Every Email Edition?

Yes. Standard reports are available for all Email Studio editions.

Collect Tracking Code

Collect Tracking Code is a JavaScript snippet that captures data about the behaviors of known and unknown visitors to your site. You can use this data to enhance contact profiles and optimize customer journeys across channels through predictive and personalized recommendations. You can also update product and content catalog details in real time or track email-driven revenue.

When a visitor goes to a website that uses the tracking code, the site leaves a cookie that contains a unique ID and session ID. The cookie adds an ID to all Collect calls. The cookie tracks the user until it's removed or cleared.

Collect Tracking Code monitors the variables and events that you select at the contact level. It can monitor these visitor attributes:

- Browser type
- User location
- Session time and length
- Page URL
- Page title
- Referrer URL

All Collect calls associated with items, such as Track Item Detail, Track Cart, and Track Purchase, must match a value in the catalog. The Status tab in the Email or Web Recommendations application provides insight into whether Collect data matches catalog data.

Collect calls can't pass more data about the page that you're viewing, and the name-value pairs in the calls can't be changed. Values like `item`, `unique_id`, and `email` are fixed labels. Never replace fixed labels with custom labels.

Install Collect Tracking Code
Learn how to configure your site to use Collect Tracking Code.

Streaming Catalog Updates Through Collect Tracking Code
To configure server-side streaming updates for items in your catalog, use the API key or catalog import option. Streaming updates replaces the standard file upload process.

Set Contact Attribute Affinity
Use Collect Tracking Code to build subscriber affinity models based on contact attributes.

Set User Information and Attributes in Collect Tracking Code
To maintain user details and subscriber information in a contact profile, use the Collect Tracking Code feature in Marketing Cloud Engagement.

Track Category Viewed
Configure Collect Tracking Code to store category data for the product a contact views on your website.

Track In-Site Search
Configure Collect Tracking Code to store data about a contact's search on your website.

Track Items in Cart
Configure Collect Tracking Code to track items that are added or removed from a contact's cart.

Track Page View
The `trackPageView` call is the most common call and can capture three types of information: product or content views, categories views, or search views.

Track Items Viewed
Configure Collect Tracking Code to track the items that a contact views on your site.

Track Purchase Details
Configure Collect Tracking Code to store details about a contact's purchases from your website.

Track User Rating
Configure Collect Tracking Code to store contact ratings for items on your website.

Configure trackWishlist for Behavioral Triggers and Collect Tracking Code
To store customer wishlists for items on your site, set up Collect Tracking Code with trackWishlist. Consult your web developer to configure Collect Tracking Code in Marketing Cloud Engagement.

Third-Party Cookies in Marketing Cloud Engagement
Marketing Cloud Engagement uses third-party cookies to track how users interact with your websites. Most web browsers have discontinued—or are in the process of discontinuing—support for third-party cookies. To ensure that you have access to the same engagement data that you've always had, Marketing Cloud Engagement uses partitioned cookies, sometimes known as Cookies Having Independent Partitioned State (CHIPS).

SEE ALSO:

Install Collect Tracking Code

Install Collect Tracking Code

Learn how to configure your site to use Collect Tracking Code.

To begin configuration of Collect Tracking Code, select **Email Recommendations** or **Web Recommendations** under Personalization Builder in the app switcher. Select Collect and complete the steps. Then install Collect Tracking Code on your site.

📝 **Note:** We recommend that you consult your web developer to complete the installation and configuration of Collect Tracking Code.

1. Copy and paste your Collect Script within the `<head>` or `<body>` section of pages on your site. Replace `MID` with your business unit account ID.

   Collect Code Script

   ```
   <script type="text/javascript" src="https://MID.collect.igodigital.com/collect.js">
   </script>
   ```

2. Copy and paste the Set Org ID Script between the body tags of each page of your website. Replace `MID` with your business unit account ID.

   Set Org ID Script

   ```
   <script type="text/javascript">
       _etmc.push(["setOrgId", "MID"]);
       _etmc.push(["trackPageView"]);
   </script>
   ```

   💡 **Tip:** Use Options and Configuration in Personalization Builder to modify predictive recommendations features. Changes made in Personalization Builder take effect immediately.

   📝 **Note:** To enable subscribers to opt out of tracking on your website, replace the Set Org ID Script with the Do Not Track Script on page 52.

Do Not Track Script

Use Do Not Track Script code to suppress Collect Tracking Code on your website when a subscriber opts out of tracking. Collect Tracking Code doesn't use browser settings to determine whether to track user activity.

Configure Collect Tracking Code for Personalization Builder

Set up Marketing Cloud Engagement to work with Collect Tracking Code and Personalization Builder.

SEE ALSO:

Do Not Track Script

Do Not Track Script

Use Do Not Track Script code to suppress Collect Tracking Code on your website when a subscriber opts out of tracking. Collect Tracking Code doesn't use browser settings to determine whether to track user activity.

This code suppresses all tracking activities, including:

- trackCart
- trackConversion
- trackEvent

- trackPageView
- trackRating

Use this code in place of the standard Set Org ID script:

```
<script type="text/javascript">
   _etmc.push(["setOrgId", "123456"]);
   _etmc.push(["doNotTrack"]);
   _etmc.push(["trackPageView"]);
   </script>
```

For information about managing privacy settings programmatically, see Personalization Builder API.

SEE ALSO:

Configure Collect Tracking Code for Personalization Builder

Consent Management for Marketing Cloud Engagement

Data Deletion for Marketing Cloud Engagement

Configure Collect Tracking Code for Personalization Builder

Set up Marketing Cloud Engagement to work with Collect Tracking Code and Personalization Builder.

1. In Personalization Builder, select **Web Recommendations** or **Email Recommendations**.

2. Hover over Admin and select **Implementation** from the dropdown.

3. Select a catalog sync method.

   - Streaming Updates
   - Batch Upload

   For streaming updates, provide a domain name and select the catalog type.

   For batch uploads, provide the information required to manually update the catalog.

4. Select the attributes to track.

5. Copy and paste codes for all attributes to track.

SEE ALSO:

Set User Information and Attributes in Collect Tracking Code

Streaming Catalog Updates Through Collect Tracking Code

Streaming Catalog Updates Through Collect Tracking Code

To configure server-side streaming updates for items in your catalog, use the API key or catalog import option. Streaming updates replaces the standard file upload process.

🛇 Important: Streaming updates using client-side JavaScript isn't supported.

To remove an item from the pool of recommendable items, use the API.

- Requests to the server-side streaming updates service via HTTP aren't accepted. Instead, use HTTPS in all requests to the streaming update service.

- API keys sent as URI query parameters aren't accepted. Instead, move the API key into the body of the request.

In this example, replace `MID` with the account ID of the business unit used for Collect Tracking Code.

```
{
  "api_key": "a1234567-cccc-1234-a123-12345a123456",
  "payload": {
    "item": "INSERT_ITEM",
    "unique_id": "INSERT_UNIQUE_ITEM_ID",
    "item_type": "INSERT_ITEM_TYPE",
    "name": "INSERT_ITEM_NAME_OR_TITLE",
    "url" : "INSERT_ITEM_URL",
    "INSERT_ATTRIBUTE_NAME": "INSERT_ATTRIBUTE_VALUE"
  }
}
```

SEE ALSO:

Install Collect Tracking Code

Einstein Recommendations Prerequisites

Install Collect Tracking Code

Set Contact Attribute Affinity

Use Collect Tracking Code to build subscriber affinity models based on contact attributes.

Match a contact attribute to a tagged catalog field to increase the subscriber's affinity for the value of that contact attribute. The amount of increase is less than what results from a purchase but more than the increase from a view.

```
<script type="text/javascript">
    _etmc.push(["setOrgId", "MID"]);
    _etmc.push(["setUserInfo", {
        "email": "INSERT_EMAIL_OR_UNIQUE_ID",
        "details": {
            "gender: "female"
        }
    }]);
    _etmc.push(["trackPageView"]);
</script>
```

1. Copy the script and replace `gender` with the contact attribute you want to match.
2. Add the modified script in the header code on the detail pages of your website.

👁 **Example:** Lisa's marketing director wants to increase the user affinity for catalog items where the gender field value is female for customers who identify as female. Lisa uses the Set Contact Attribute Affinity code to permanently boost any item that has the value female in the gender field.

SEE ALSO:

Install Collect Tracking Code

Einstein Recommendations Catalog

Configure Custom Attributes for Einstein Recommendations

User Affinity Tag Scenario

Configure a tag scenario to return the most popular items with a particular catalog attribute value. Set the recommendation engine to return items with attribute values that match the top affinities of a contact. This feature can power recommendations like Brands You Love or Items in your Favorite Colors.

1. Highlight the catalog attribute to use.

2. Select **Same as User Affinity** as the value.

> 👁 Example: Lisa's marketing director wants to increase the user affinity for catalog items where the gender field value is female for customers who identify as female. Lisa uses the Set Contact Attribute Affinity code to permanently boost any item that has the value female in the gender field.
>
> The SetUserInfo call can also include customer attributes specific to the contact on the site. The label can be any value and pulls into the Contact Profile exactly as passed. The value for each pair overwrites any value that is on the profile for the active user.
>
> To use the affinity seeding functionality, the label must match the field in the catalog and the value passed must be assigned to a product on the catalog.
>
> Customer Attributes cannot be exported and currently do not get passed into Marketing Cloud data extensions. The primary use cases for these values are to seed Contact Attribute Affinity and to use these values in rules in influence recommendations. For example, a financial institution adds AgeGroup as Minor for some users, and then creates a rule that prohibits the recommendation engine from recommending items where `OfferType=CreditCard when AgeGroup = Minor`.

Set User Information and Attributes in Collect Tracking Code

To maintain user details and subscriber information in a contact profile, use the Collect Tracking Code feature in Marketing Cloud Engagement.

The setUserInfo push passes the Contact ID. Regardless of the type of ID chosen, use the email label for this field and add the value in the SetUserInfo snippet. You don't need to add it to every page because adding it once ties the known identifier to the Collect Tracking Code cookie.

> 💡 Tip: Configure Collect Tracking Code to store subscriber information when a contact enters an email address on the website or clicks through a marketing email. To use the Personalization Builder Integrations on page 347, you must use the user's email address. For privacy reasons, avoid using a personally identifiable information (PII) identifier or hashing the email.

Set User Info

```
<script type="text/javascript">
    _etmc.push(["setOrgId", "MID"]);
    _etmc.push(["setUserInfo", {
        "email": "INSERT_EMAIL_OR_UNIQUE_ID"
    }]);
    _etmc.push(["trackPageView"]);
</script>
```

> 💡 Tip: Add this call everywhere that a user logs in or becomes known, such as login pages and sign-up pages.

1. Copy and customize the script by replacing `INSERT_EMAIL_OR_UNIQUE_ID` with dynamic code to get the Subscriber ID. A Subscriber ID is typically an email address or number unique to that user.

2. Add the modified script in the header code on your pages.

SEE ALSO:

Track Category Viewed

Configure Collect Tracking Code to store category data for the product a contact views on your website.

The `trackpageview` call is also used on category pages to capture the category viewed by a visitor. This call uses the category name–value pair and the label is reserved.

The category value is flexible, but we recommend that you include values that match tag fields in the catalog. Use the same structure for all type page categorizations, from categories to subcategories to brands.

Only one category is added to the Collect call at a time, so choose the most relevant term for the page being viewed. Usually, this term aligns with the most specific category. For example, on a category page with a navigation path of Men's > Apparel > Shoes > Tennis Shoes, the category is "Tennis Shoes." This category corresponds to a "Tennis Shoes" category in the product catalog.

```
<script type="text/javascript">
    _etmc.push(["setOrgId", "MID"]);
    _etmc.push(["trackPageView", { "category" : "INSERT_CATEGORY" }]);
</script>
```

1. Copy and customize the code by replacing `INSERT_CATEGORY` with dynamic code for the category of items viewed.

2. Add the modified script in the header code on your category pages.

SEE ALSO:

Track In-Site Search

Configure Collect Tracking Code to store data about a contact's search on your website.

The Track In-Site Search call isn't required. We recommend that you don't use it unless it's explicitly needed for your use case.

1. Copy the code and replace `INSERT_SEARCH_TERM` with dynamic code that pulls in the search term.

```
<script type="text/javascript">
    _etmc.push(["setOrgId", "MID"]);
    _etmc.push(["trackPageView", { "search" : "INSERT_SEARCH_TERM" }]);
</script>
```

2. Paste the modified script in the header code on your detail pages.

SEE ALSO:

Track Items in Cart

Configure Collect Tracking Code to track items that are added or removed from a contact's cart.

Use `trackCart` anytime a shopping cart changes, such as when a visitor adds or removes a product to the cart, or updates the quantity of a product in the cart.

This code overwrites items in the contact's cart with the newest information, including the quantity and unit price for each item. If a cart has multiple products, each product must be added to the call each time it's captured. The active cart must be added to the call every time. This call is critical for Abandon Cart triggers, which uses this call to determine which products to show were abandoned.

The call is made up of name–value pairs. The only accepted names are `item`, `quantity`, `price`, and `unique_id`. Only `item` and `unique_id` are required.

Use the `trackCart` each time a product is added to the cart or the cart is updated. This activity often occurs on product pages, category pages, and shopping cart pages.

We recommend that you always include `setUserId` with `trackCart`. This practice helps to ensure that the correct Contact ID is always tied to the cart.

```
<script type="text/javascript">
    _etmc.push(["setOrgId", "MID"]);
    _etmc.push(["trackCart", {
        "cart": [
            {
                "item": "INSERT_ITEM",
                "quantity": "INSERT_QUANTITY",
                "price": "INSERT_PRICE",
                "unique_id": "INSERT_UNIQUE_ID"
            },
            {
                "item": "INSERT_ITEM",
                "quantity": "INSERT_QUANTITY",
                "price": "INSERT_PRICE",
                "unique_id": "INSERT_UNIQUE_ID"
            }
        ]
    }]);
</script>
```

1. Copy and customize the script.

2. Add the modified script in the header code on your detail pages.

SEE ALSO:

Clear Cart

Use this code to clear all items from a contact's cart when the contact manually removes all items from the cart.

This call is vital for implementations with Abandon Cart triggers, as contact receive unwanted abandon cart emails for products they cleared from their cart.

```
<script type="text/javascript">
    _etmc.push(["setOrgId", "MID"]);
    _etmc.push(["trackCart", { "clear_cart": true } ]);
</script>
```

✏️ **Note:** The `trackConversion` method clears the contact cart automatically.

Track Page View

The `trackPageView` call is the most common call and can capture three types of information: product or content views, categories views, or search views.

✏️ **Note:** To have the search field populated in IGO_VIEWS, include the search parameter in the tracking call. Use the item parameter to create a record in IGO_VIEWS.

1. Copy the script and replace `INSERT_PRODUCT_CODE` with the attribute you want to match.

```
<script type="text/javascript">
    _etmc.push(["setOrgId", "MID"]);
    _etmc.push(["trackPageView", { "item" : "INSERT_PRODUCT_CODE","search" : "XXXXX"
}]);
</script>
```

2. Paste the modified script in the header code on your detail pages.

SEE ALSO:

Track Items Viewed

Configure Collect Tracking Code to track the items that a contact views on your site.

The value for the item must match to the field mapped to the ProductCode or ContentID. If the item ID doesn't match a record in the catalog, no affinity is built for the item. Mismatched item and field in the catalog is one of the most common mistakes during setup.

Match the value sent for `INSERT_ITEM` to the Product Code catalog field if you include a catalog file with your Personalization Builder implementation.

1. Copy and customize the script by replacing `INSERT_ITEM` with the dynamic code for the unique identifier of each item.

```
<script type="text/javascript">
    _etmc.push(["setOrgId", "MID"]);
    _etmc.push(["trackPageView", { "item" : "INSERT_ITEM" }]);
</script>
```

2. Paste the modified script in the header code on your detail pages.

Track Purchase Details

Configure Collect Tracking Code to store details about a contact's purchases from your website.

1. Copy and customize the Track Conversion script to include the attributes to track.

```
<script type="text/javascript">
    _etmc.push(["setOrgId", "MID"]);
    _etmc.push(["trackConversion", {
        "cart": [
            {
                "item": "INSERT_ITEM",
                "quantity": "INSERT_QUANTITY",
                "price": "INSERT_PRICE",
                "unique_id": "INSERT_UNIQUE_ID"
            },
            {
                "item": "INSERT_ITEM",
                "quantity": "INSERT_QUANTITY",
                "price": "INSERT_PRICE",
                "unique_id": "INSERT_UNIQUE_ID"
            }
        ],
```

```
            // OPTIONAL PARAMETERS
            "order_number": "INSERT_ORDER_NUMBER",
            "discount": "INSERT_DISCOUNT",
            "shipping": "INSERT_SHIPPING",
            "details": {
                "AttributeName": "Value"
            }
            // END OPTIONAL PARAMETERS
     }]);
</script>
```

2. Paste the modified script in the header code on your detail pages. This method requires the same structure as the Track Cart script.

3. Optionally, add order level information, such as order number, shipping charges, discounts applied, and custom details.

SEE ALSO:

Install Collect Tracking Code

Track Category Viewed

Track In-Site Search

Track Items in Cart

Track Page View

Track User Rating

Track User Rating

Configure Collect Tracking Code to store contact ratings for items on your website.

```
<script type="text/javascript">
   _etmc.push(["setOrgId", "MID"]);
   _etmc.push(["trackRating", { "rating" : 5,
         "item" : "INSERT_ITEM",
         "unique_id" : "INSERT_UNIQUE_ID" }]);
</script>
```

📝 **Note:** Match the value sent for "INSERT_ITEM" to the Product Code catalog field if you include a catalog file with your Personalization Builder implementation.

1. Copy and customize the script by replacing "INSERT_ITEM" with dynamic code for the unique identifier of the item rated. Optionally, replace "INSERT_UNIQUE_ID" with the dynamic code to pull in the unique child identifier for the item rated.

2. Paste the modified script in the header code on your detail pages.

SEE ALSO:

Install Collect Tracking Code

Track Category Viewed

Track In-Site Search

Track Items in Cart

Track Page View

Track Purchase Details

Configure trackWishlist for Behavioral Triggers and Collect Tracking Code

To store customer wishlists for items on your site, set up Collect Tracking Code with trackWishlist. Consult your web developer to configure Collect Tracking Code in Marketing Cloud Engagement.

1. Copy this script.

```
<script type="text/javascript">
   _etmc.push(["setOrgId", "MID"]);
   _etmc.push(["trackWishlist", {
       "items" : ["INSERT_ITEM_1", "INSERT_ITEM_2", "INSERT_ITEM_3"],
       "skus" : ["INSERT_UNIQUE_ID_1", "INSERT_UNIQUE_ID_2", "INSERT_UNIQUE_ID_3"
</script>
```

Match the value sent for "INSERT_ITEM" to the Product Code catalog field if you include a catalog file with your Personalization Builder implementation. Each subsequent trackWishlist call replaces the contact's wishlist data. If you want the contact's entire wishlist to persist, include all items in each call.

2. To customize it, replace "INSERT_ITEM_X" with dynamic code for the unique identifier of the item rated.

3. To pull in the unique child identifier for the item rated, replace "INSERT_UNIQUE_ID" with the dynamic code.

4. Paste the modified script in the header code on the pages where users manage their wishlist.

Validate Collect Tracking Code Implementation

After you configure a catalog and deploy Collect Tracking Code to your website, test it to make sure it's installed properly.

1. Browse your website, visiting each class of page that uses Collect Tracking Code.

2. In Personalization Builder, select **Email Recommendations** or **Web Recommendations**.

3. Click the **Status** tab. The Status Console provides a lens into today's traffic on each class of page. Ensure that the counts for each type of page have incremented as you expect them. It also shows common implementation problems and provides details on how to fix them.

4. Subscribe to notifications to receive an email if data collection stops on a specific class of page.

Third-Party Cookies in Marketing Cloud Engagement

Marketing Cloud Engagement uses third-party cookies to track how users interact with your websites. Most web browsers have discontinued—or are in the process of discontinuing—support for third-party cookies. To ensure that you have access to the same engagement data that you've always had, Marketing Cloud Engagement uses partitioned cookies, sometimes known as Cookies Having Independent Partitioned State (CHIPS).

If you use Collect Tracking Code to capture data about visitors to your websites, you don't need to do anything to implement partitioned cookies. The cookies that Collect Tracking Code uses to track user interactions have partitioning enabled by default. Because these cookies are partitioned, they continue to work in browsers that no longer support unpartitioned third-party cookies.

Web Browsers That No Longer Support Third-Party Cookies

Recent versions of Firefox and Safari block third-party cookies by default. Google plans to discontinue support for unpartitioned third-party cookies in the desktop and mobile versions of Chrome in late 2024. After this date, Chrome will only accept partitioned third-party cookies. Other common web browsers, including Edge and Opera, are based on the same underlying code as Chrome and are likely to adopt the same features as Chrome.

Why Browser Developers Are Discontinuing Support for Third-Party Cookies

Third-party cookies are an important tool for helping web-based applications track information such as login details and user preferences. However, third-party cookies can also be used to track a user's activities across multiple websites without that user's knowledge. For this reason, third-party cookies can represent a compliance risk for marketers and a privacy risk for end users.

How Partitioned Cookies Work

A partitioned cookie can collect data only on a single site. For example, a user goes to a website called dreamhouserealty.com. The site contains an iframe, which brings in content from the web domain webtracker.example. The webtracker.example site in the iframe sets a cookie on the user's device.

Later, the same user visits the website ursamajorsolar.com, which contains the same iframe from webtracker.example. In this scenario, the cookie that webtracker.example set can now access the cookies that were set on both dreamhouserealty.com and ursamajorsolar.com. As a result, webtracker.example can track usage behaviors across multiple websites and tie them back to a single user.

With partitioned cookies, webtracker.example can still set cookies on both sites. However, because the cookies are partitioned, webtracker.example can't connect the user's behaviors on dreamhouserealty.com to behaviors on ursamajorsolar.com.

SEE ALSO:

> CHIPS on the W3C Privacy Community Group's Github repository
>
> Cookies Having Independent Partitioned State on the Chrome Developers site
>
> Cookies Having Independent Partitioned State on Mozilla.org

Intelligence Reports for Engagement

Use Intelligence Reports for Engagement to generate, view, and share a detailed analysis of your email, push, and journey campaign-level data. Intelligence Reports for Engagement Advanced, which is available for an additional cost, includes more features, functionality, and analytics. Intelligence Reports on Hyperforce supports email and push channels.

Intelligence Reports for Engagement is powered by Marketing Cloud Intelligence, and is available in two versions:

EDITIONS

Available in: Intelligence Reports for Engagement and Intelligence Reports for Engagement Advanced

- **Intelligence Reports for Engagement**—This standard version is included in Pro editions and higher. Intelligence Reports for Engagement includes dashboards, pivot tables, and reports. With Intelligence Reports for Engagement, you can:

    - Analyze your data, and then receive intuitive analytics with built-in dashboards that visualize aggregated Email, Push, and Journey data up to the business unit level.

    - View comparisons, trends, and patterns in your data, and organize and summarize data in a custom report.

    - Filter, sort, and summarize data with pivot tables, and share findings with scheduled reports.

    - Manipulate, visualize, and share pivot tables, dashboards, and scheduled reports.

- **Intelligence Reports for Engagement Advanced**— This premium version is available as an add-on for Pro editions and above. Intelligence Reports for Engagement Advanced includes more dashboard capabilities, pivot tables, reports, cross-channel apps, and query options. Intelligence Reports for Engagement Advanced, is a premium upgrade of Intelligence Reports for Engagement that adds more features, functionality, and analytics. The Advanced upgrade is available at an additional cost. With Intelligence Reports for Engagement Advanced, you can:

    - Connect, visualize, and analyze key data sources quickly with cross-channel apps built by Marketing Cloud Intelligence.

- Customize and create dashboards that meet end-users' needs.
- Create and refine your key performance indicators (KPIs).
- Create more fields and attributes using Marketing Cloud Intelligence's 100+ functions.

Here's a comparison of the two versions.

Feature	Intelligence Reports	Intelligence Reports Advanced
View built-in dashboards	✓	✓
Create and manage reports	✓	✓
Create and manage pivot tables	✓	✓
Create and customize dashboards	✗	✓
Create and manage calculated measurements and dimensions	✗	✓
Query granular data	✗	✓
View and install cross-channel apps	✗	✓
Connect and query data extensions	✗	✓

The Intelligence Reports and Intelligence Reports Advanced interface support these languages: English, Japanese, German, French, and Spanish.

📝 Note:

- Some of the screens haven't been translated yet.
- Currently dashboards aren't translated.
- Dimension and measurement names appear in English.
- All dimension and measurement values appear in their source language, no matter the language. For example if your campaign name is in Spanish, it appears as is in all reports.

Here's a video about Intelligence Reports for Engagement:

🎥 Watch a video

For more information about Intelligence Reports for Engagement, see:

Start Learning About Intelligence Reports

If you're a new user or need a refresher, click on the learning maps below to learn the basics of Intelligence Reports and Intelligence Reports Advanced. The learning maps contain links to other resources, like Trailhead and videos, and starter help topics. You can always come back to the learning maps to refresh your skills, or check out newly added content.

User Roles and Permissions in Intelligence Reports

To use Intelligence Reports for Engagement, your account must be assigned the Intelligence Reports for Engagement user role. The user role has the following permissions: Access, View and Export, Schedule, and Create and Edit.

Access Intelligence Reports

To access Intelligence Reports for Engagement, you need the required user role assigned to your account. When assigning the user role, you can also assign permissions in Intelligence Reports. For example, you can create pivot tables, but you can't edit or save them.

Overview of Data in Intelligence Reports

Intelligence Reports for Engagement displays both Email, Push, and Journey campaign-level data. Intelligence Reports for Engagement doesn't display subscriber-level data or event-level data. However, subscriber-level data can be used to generate campaign-level analytics. With Intelligence Reports for Engagement you can see how many emails or messages were opened, delivered, and clicked. The data that is displayed is daily aggregated metrics. For example, you can see the number of send and open rates per day, during the last 90 days, for a specific campaign.

Dimensions and Measurements

Dimensions and measurements are included when viewing dashboards, pivot tables, and reports. Use categories to find the data that's most relevant to you.

Send Date Versus Event Date

All engagement events in Intelligence Reports have two date dimensions: Event, and send.

Dashboards

Dashboards provide an out-of-the box view of your Email, Push, and Journey data. With dashboards, you gain valuable insights and can quickly identify trends or anomalies. With the premium Advanced version, you can also create and edit dashboards.

Pivot Tables Overview

Pivot tables allow you to explore your data from multiple perspectives. You can calculate, summarize, and analyze data by seeing comparisons, patterns, and trends in your data. With pivot tables, you can create custom reports without the need for query formulas, such as SQL queries.

Reports Overview

Reports are an easy way to retrieve, view, and share a detailed analysis of your data. You can create the report from scratch by going to the Reports tab and clicking Create New Report. Or you can create the same report by using the Schedule Export option when in a dashboard page or in a pivot table. For example, to create a flat table report, create the report from scratch in Excel, or go to a predefined pivot table and use the Schedule Export Flat Table option.

Cross-Channel Apps

Cross-Channel apps allow you to take your data from separate silos, and then connect, visualize, and analyze your key data sources. The apps are available in the Cross-Channel tab, where you can demo and install various apps.

Queries

Use Queries to pull granular data and get insights on your subscriber level data. For example, learn which subscribers engaged in a particular journey or investigate messages sent to a specific subscriber. Explore and export results for a deeper understanding of your data.

Calculated Fields

Create calculated fields in Intelligence Reports Advanced when you need customized dimensions and measurements.

Data Extensions

Query your engagement data with data extension data to retrieve additional attributes and measurements. Identify trends and get marketing insights based on performance by audience attributes from your data extensions.

Differences Between Intelligence Reports and Other Reports

When using other Marketing Cloud Engagement reporting tools, such as Data Views, the results you see can vary depending on the type of report and its purpose.

Set Up Intelligence Reports on Hyperforce

Using Hyperforce requires a new connection between Data Cloud and Marketing Cloud Engagement. Intelligence Reports provisioned for Marketing Cloud Engagement is hosted on a Salesforce-managed Hyperforce infrastructure in the applicable region. Intelligence Reports on Hyperforce use data service credits on Data Cloud.

Start Learning About Intelligence Reports

If you're a new user or need a refresher, click on the learning maps below to learn the basics of Intelligence Reports and Intelligence Reports Advanced. The learning maps contain links to other resources, like Trailhead and videos, and starter help topics. You can always come back to the learning maps to refresh your skills, or check out newly added content.

<div style="float:right; border:1px solid #ccc; padding:8px;">

EDITIONS

Available in: Intelligence Reports and Intelligence Reports Advanced

</div>

Intelligence Reports Learning Map

Learn more about Intelligence Reports by navigating through the different resources.

Intelligence Reports Advanced Learning Map

Learn more about Intelligence Reports Advanced by navigating through the different resources.

Intelligence Reports Learning Map

Learn more about Intelligence Reports by navigating through the different resources.

Get Started with Intelligence Reports

Trailhead: Get to Know Intelligence Reports

User Roles and Permissions in Intelligence Reports

Overview of Data in Intelligence Reports

Dimensions and Measurements

View & Share Dashboards

Trailhead: Get Started with Dashboards

Pre-Configured Dashboards

Sharing Dashboard Pages and Widgets

Create Pivot Tables

Trailhead: Explore Your Data with Pivot Tables

Create a Pivot Table in Intelligence Reports

Customize a Pivot Table in Intelligence Reports

Export a Pivot Table in Intelligence Reports

Create Reports

Trailhead: Create Scheduled Reports

Create a Report

Learn More

Trailhead: Intelligence Reports for Engagement

Set Report Schedule and Delivery Method View Report History	Trailhead: Intelligence Reports for Engagement Advanced	

Intelligence Reports Advanced Learning Map

Learn more about Intelligence Reports Advanced by navigating through the different resources.

Get Started with Intelligence Reports Advanced

Trailhead: Get to Know Intelligence Reports Advanced

User Roles and Permissions in Intelligence Reports

Overview of Data in Intelligence Reports

Dimensions and Measurements

Create & Customize Collections and Dashboards

Trailhead: Customize Dashboard Pages

Video: Create a New Dashboard

Video: Apply Filters to Dashboards and Design Elements

Create a Collection

Customize Dashboard Pages

Query Your Data

Trailhead: Get Familiar with Queries

Query Your Data with Query Builder

Query Your Data with SQL

Create a Query with a Data Extension

Query Export Options

Install & Use Apps

Trailhead: Install Cross-Channel Solutions

Available Cross-Channel Apps

Use Calculated Fields

Trailhead: Calculated Measurements and Dimensions

Create a Calculated Dimension

Calculated Dimensions Use Cases

Create a Calculated Measurement

Calculated Measurements Use Cases

Learn More

Trailhead: Intelligence Reports for Engagement Advanced

Trailhead: Intelligence Reports for Engagement Advanced: Queries

User Roles and Permissions in Intelligence Reports

To use Intelligence Reports for Engagement, your account must be assigned the Intelligence Reports for Engagement user role. The user role has the following permissions: Access, View and Export, Schedule, and Create and Edit.

User Role

📝 **Note:** The Enable Intelligence Reports Integration checkbox doesn't affect Intelligence Reports. This checkbox is related to the Marketing Cloud Engagement connector.

Your account must be assigned the Intelligence Reports for Engagement user role. The following permissions are available:

- Access, View & Export
- Schedule
- Create & Edit

User Permissions

These tables explain each permission and the available actions you can perform per permission:

Action / Permission	Access, View & Export	Schedule	Create & Edit
View & Export Dashboards	✅	✅	✅
Create & Export Pivot Tables	✅	✅	✅
Save, Edit & Delete Pivot Tables	❌	❌	✅
Schedule Report	❌	✅	✅

Here are additional actions available with Intelligence Reports for Engagement Advanced:

Action / Permission	Access, View & Export	Schedule	Create & Edit
Create & Customize Dashboards	❌	❌	✅
Create Calculated Dimensions and Measurements	❌	❌	✅
Install Apps	❌	❌	✅
Consume Cross-Channel Apps	✅	✅	✅
Query Data Lake	❌	❌	✅
Connect and Query Data Extensions	❌	❌	✅

This table displays how each permission affects the different Marketing Cloud Engagement user roles:

MC Role / Permission	Access, View & Export	Schedule	Create & Edit
Admin or Marketing Cloud Engagement Administrator	✓	✓	✓
Analyst or Marketing Cloud Engagement Channel Manager or Marketing Cloud Content Editor	✓	✓	✓
Marketing Cloud Engagement Viewer	✓	✓	✗

SEE ALSO:

Access Intelligence Reports

To access Intelligence Reports for Engagement, you need the required user role assigned to your account. When assigning the user role, you can also assign permissions in Intelligence Reports. For example, you can create pivot tables, but you can't edit or save them.

> 📝 **Note:** If you purchased Intelligence Reports for Engagement Advanced, all the advanced features are automatically enabled in your account. No other steps are required.

You can only log into one instance of Marketing Cloud Intelligence at a time – you can't log into Marketing Cloud Intelligence and Intelligence Reports for Engagement at the same time. If you must be logged into both, you can log into one instance using Chrome Incognito mode.

The first time you activate Intelligence Reports for Engagement, up to 90 days of historical data is available. From that point on, the data is retained for 2 years.

> 📝 **Note:** If you don't see the Intelligence Reports tab, it's possible that you don't have the required permissions, or that Intelligence Reports hasn't been enabled in your account.

To access Intelligence Reports for Engagement, click **Analytics Builder** > **Intelligence Reports**.

EDITIONS

Available in: Intelligence Reports and Intelligence Reports Advanced

You can access Intelligence Reports in the context of the enterprise unit, or via the child business unit, which affects the data you see.

Enterprise versus Business Unit

- Enterprise—If you access Intelligence Reports for Engagement via an enterprise account, you can access all the data for all the business units that are in the enterprise account.
- Business Unit—If you access Intelligence Reports for Engagement via a specific business unit, you can see only the data pertaining to that business unit. You can only filter by entities in that unit.

Overview of Data in Intelligence Reports

Intelligence Reports for Engagement displays both Email, Push, and Journey campaign-level data. Intelligence Reports for Engagement doesn't display subscriber-level data or event-level data. However, subscriber-level data can be used to generate campaign-level analytics. With Intelligence Reports for Engagement you can see how many emails or messages were opened, delivered, and clicked. The data that is displayed is daily aggregated metrics. For example, you can see the number of send and open rates per day, during the last 90 days, for a specific campaign.

Important Information about Data in Intelligence Reports

- Data retention — The first time you activate Intelligence Reports for Marketing Cloud Engagement, up to 90 days of historical data is available. From that point on, historical data is retained for 2 years. The 2 years is according to the event date, meaning any event that happens after 2 years doesn't appear.

  Note: Historical data that's over 90 days can't be processed; therefore if you're encountering issues with data that's older than 90 days we recommend you open a ticket as soon as you encounter missing data.

- Data refresh — Data is refreshed every 24 hours. Each account has its own time for daily refresh, and it can't be set.

- Data retrieval — If a failure in data retrieval from Marketing Cloud Engagement to Intelligence Reports occurs, the process retries every few hours. Any other data is reprocessed the following day. Such failures are monitored internally. The user isn't notified of an error. However, even with an error, you can keep using Intelligence Reports and retrieve reports based on existing data.

- Data deletion — When you delete a contact record for one or more subscribers within Marketing Cloud Engagement, personal information for those contacts is removed from Intelligence Reports within 90 days. Also, when your Intelligence Reports subscription is terminated, your customer data is deleted in accordance with the Marketing Trust and Compliance Documentation.

- Data migration— Data migration between stacks isn't supported in Intelligence Reports. If you must migrate, support can help with the migration; however historical data won't be brought over. Contact your Salesforce account executive for more information.

- Time zone — Daily data is presented (aggregated) according to the time zone set in your enterprise's business unit settings. All business units that belong to the enterprise reflect the enterprise's time zone.

  - If you change the time zone, it doesn't affect past data, only data collected after the change.

  - If you log into Intelligence Reports for Engagement after the change, the time zone is updated automatically. However, if you don't log in right after the change, then it can take up to 7 days for the change to take place.

Available Data Elements

There are two types of data elements available: dimensions and measurements.

- Dimensions — Qualitative non-numerical data that you can't count, for example campaign name and campaign ID.

- Measurements — Quantitative numerical data that you can count, for example, number of clicks and emails opened.

If you're using Advanced Intelligence Reports, you can also create calculated data element fields:

- Calculated Dimensions — Non-numerical fields or dimensions that you can create on top of your existing data. These queries can be referenced to from reports and pivot tables, and they can support a variety of functions and logical conditions.

- Calculated Measurements — Numerical custom calculations that you can create on top of your existing data. You can reference dimensions and measurements along with a number of different functions and operators.

For a full list of all the measurements and dimensions that are available, see Dimensions and Measurements.

Measurements are associated with dimensions of the same time. For example, opens are associated with the business unit name according to that same day. If you change the name of the business unit, the new data is associated with the new business unit name. And, you

could see split data with the old name as well. When you assign an email to a campaign, this campaign assignment only picks up for new sends. It doesn't pick up retroactive sends.

Dimensions and Measurements

Dimensions and measurements are included when viewing dashboards, pivot tables, and reports. Use categories to find the data that's most relevant to you.

Omni-Channel Dimensions and Measurements

The fields listed in this table refer only to the fields you see in Dashboards, Pivot Tables, and Reports. These fields are different from the ones you see when you use Queries in Intelligence Reports Advanced. For more information about the different fields in Queries, see Queries Data View.

Category	Field Name	Type	Description
Time Attributes	Event Date (Day, Week, Month)	Dimension	The date an event such as an open or click occurred.
	Send Date (Day, Week, Month)	Dimension	The date that the originating message was sent.
Enterprise or Business Unit	Business Unit	Dimension	The name of the business unit that sent the message.
	Business Unit ID	Dimension	The ID of the business unit.
	Enterprise ID	Dimension	The ID of the enterprise account.
Audience Attributes (Not available for triggered mobile push messages, or in-app messages.)	Audience Name	Dimension	The name of the audience that the email or message was sent to. Audience name refers to the Publication List for Journey sends. Note: Only 1 audience is supported.
	Audience Type	Dimension	The audience type: List or Data Extension.
Journey Attributes (Only available if you have Journey Builder enabled in your account.)	Journey ID	Dimension	The internal unique identifier of the journey and its version.
	Journey Name	Dimension	The journey name. For Push data, not all messages are assigned a journey name.
	Journey Version	Dimension	The journey version.
	Journey Status	Dimension	The journey status: Draft, Running, Paused, Finishing, or Stopped.
	Journey Activity Name	Dimension	The journey activity name.
	Journey Activity Type	Dimension	The journey activity type.

Category	Field Name	Type	Description
	Journey Description	Dimension	The journey description.
	Journey Created Date	Dimension	The date the journey was created.
	Journey Last Published Date	Dimension	The last date that the journey was published.
	Journey Modified Date	Dimension	The last date that the journey was modified.
	Contact Entry Mode	Dimension	This mode dictates when the contact is eligible to enter a journey.
Campaign Attributes	Campaign	Dimension	The Marketing Cloud Engagement campaign at the time of the send (if assigned). Note: Only 1 campaign is supported.
	Campaign ID	Dimension	The campaign's internal ID.
	Campaign Code	Dimension	The campaign's code, as given by the user.
	Campaign Start Date	Dimension	The campaign's start date.
	Campaign End Date	Dimension	The campaign's end date.
	Campaign Status	Dimension	The campaign's status.

Email Dimensions and Measurements

Category	Field Name	Type	Description
Email Attributes	Email Job ID	Dimension	The unique identifier of the email sent.
	Email Content Name	Dimension	The email name at the time of send.
	Email Send Name	Dimension	The name of the send definition used to send the email. (This data is currently partially available.)
	Email Subject	Dimension	The email subject at the time of send.
	Email Status	Dimension	The email job status at the time of send.

Category	Field Name	Type	Description
	Email Send Type	Dimension	The type of message sent.
			• Triggered – Anything that uses event-driven sending queues, such as SOAP triggered sends and Transaction Journey and REST APIs.
			• Standard – Includes batch-based sending, such as sending by a list or by a data extension through Automation Studio or Email Studio.
	Email Send Classification Type	Dimension	This field represents the value selected in the CAN-SPAM Classification and can display either Commercial or Transactional values.
			For more information about send classifications, see Send Classifications in Marketing Cloud Engagement.
	Email Test Indicator	Dimension	A flag that indicates the message was part of a test send.
	Email Sender Address	Dimension	The email sender's address.
	Email Sender Name	Dimension	The email sender's name.
	Email Sender IP	Dimension	The IP address of the sent message. The IP address can be empty in cases where the email wasn't sent successfully.
			Note: From June 2022 and onwards, triggered emails are supported.
	Email Pre-Header	Dimension	The email preheader. A preheader is the text following the subject line when an email is previewed. A preheader is one of the first three items that a subscriber sees when viewing an email.

Category	Field Name	Type	Description
	Email Domain	Dimension	The email domain for the message that was sent, such as yahoo.com or gmail.com.
	Email Country Code	Dimension	The country code of the user who engaged with the email. • Only available for the U.S. • Not always available or accurate due to dependencies on mail proxy servers, VPNs, and privacy controls.
	Region Code	Dimension	The state of the user who engaged with the email. • Only available for the U.S. • Not always available or accurate.
User Agent *Disclaimer*: Salesforce doesn't guarantee the accuracy or completeness of this data. Use as reference only.	Email Browser Model	Dimension	The browser model for the email that was sent, such as Firefox or Chrome. (Only available for opens and clicks.)
	Email Browser Name	Dimension	The browser name for the email that was sent, such as Chrome 96 or Edge 96. (Only available for opens and clicks.)
	Email Device Model	Dimension	The device model for the email that was sent. (Only available for opens and clicks.)
	Email Device Name	Dimension	The device name for the email was sent. (Only available for opens and clicks.)
	Email Client Model	Dimension	The email client model for the email that was sent. For example, Outlook. (Only available for opens and clicks.)
	Email Client Name	Dimension	The email client name for the email that was sent. For example, Outlook 2013. (Only available for opens and clicks.)
	Email Device OS Model	Dimension	The operating system model used for the email that was sent.

Category	Field Name	Type	Description
			(Only available for opens and clicks.)
	Email Device OS Name	Dimension	The operating system device name used for the email that was sent. (Only available for opens and clicks.)
	Email Device Type	Dimension	Type of device used, mobile, or desktop. (Only available for opens and clicks.)
	Email Feature Phone	Dimension	Indicates if a feature phone received the message. Feature phones are older-generation mobile phones and are mostly used in Japan. (Only available for opens and clicks.)
	Email Link Alias	Dimension	The actual link that was clicked within the email. Only works for links that are assigned a link alias. (Only available for clicks.)
Email Delivery	Email Sends	Measurement	The number of emails sent. Includes successful and unsuccessful sends.
	Email Bounces	Measurement	The number of blocks and hard and soft bounces received from the sender's email address.
	Email Bounces Hard	Measurement	The number of hard bounces.
	Email Bounces Soft	Measurement	The number of soft bounces.
	Email Bounces Block	Measurement	The number of blocked bounces.
	Email Bounces Technical	Measurement	The number of technical bounces.
	Email Bounces Unknown	Measurement	The number of unknown bounces.
	Email Bounces Unclassified	Measurement	The number of unclassified bounces. This is used when the bounce type is empty.
	Email Bounce Type	Dimension	The email bounce type: • Block – Number of bounces resulting from a complaint, blocklist, content, URL block, or authentication error.

Category	Field Name	Type	Description
			• Hard – Number of bounces caused by an unknown domain or user, or syntax error.
			• Soft – Number of bounces resulting from a full or temporarily inactive mailbox, or temporary domain failure.
			• Technical – Number of bounces caused by the server, data format, or network error.
			• Unknown – Number of bounces that occurred for an unknown reason.
			Note: Bounce rate can't be attributed to a specific bounce type because sends aren't attributed to a specific bounce type.
	Email Deliveries	Calculated Measurement	The number of emails delivered. Calculation: (Number of Sends) - (Number of Bounces).
	Email Delivery Rate	Calculated Measurement	Percentage of emails delivered. Calculation: (Number of sends) - (Number of Bounces) / (Number of Sends).
	Email Bounce Rate	Calculated Measurement	Percentage of emails that bounced. Calculation: (Number of Bounces) / (Number of Sends).
Email Engagement	Email Unique Opens	Measurement	The number of opens by distinct subscribers. Any other attributes about unique opens show information relevant to the first open for that user. Note: Sometimes this measurement doesn't accurately reflect actual engagement. Tell me more.

Category	Field Name	Type	Description
	Email Total Opens	Measurement	The total number of emails opened.
	Emails Unique Clicks	Measurement	The number of clicks by distinct subscribers. Any other attributes about unique clicks show information relevant to the first click for that user. Note: This measurement also includes unsubscribe clicks.
	Email Total Clicks	Measurement	The total number of email clicks.
	Email Unique Unsubscribes	Measurement	The total number of unique unsubscribes. Any other attributes about unique unsubscribes show information relevant to the first click for that user.
	Email Total Unsubscribe	Measurement	The total number of users who unsubscribed.
	Email Open Rate	Calculated Measurement	Percentage of email opens. Calculation: (Unique Opens) / (Deliveries). Note: Sometimes this measurement doesn't accurately reflect actual engagement. Tell me more.
	Email Click Rate	Calculated Measurement	Percentage of email clicks. Calculation: (Unique Clicks) / (Delivered Emails)
	Email Click-To-Open Rate	Calculated Measurement	Percentage of email clicks to opens. Calculation: (Unique Clicks) / (Unique Opens) Note: This measurement may not accurately reflect actual engagement. Tell me more.
	Email Unsubscribe Rate	Calculated Measurement	Percentage of email unsubscribes. Calculation: (Unique Subscribes) / (Delivered Emails)

Category	Field Name	Type	Description
	Email Total Complaints	Measurement	The total number of complaints received by unique IPs. A complaint is logged when a subscriber flags the email as spam. Note: Most email providers don't include this data.
	Email Unique Complaints	Measurement	The number of complaints by distinct users. Note: Most email providers don't include this data.
	Email Studio Total Conversions	Measurement	The number of conversions an email has received by unique IPs.
	Email Studio Unique Conversions	Measurement	The number of conversions by distinct users.
	Email Click Event Lag Days	Calculated Measurement	The average time in days that passed between the click and send time.

Push Dimensions and Measurements

Category	Field Name	Type	Description
Push Notification Attributes	Push Content Name	Dimension	The name of the content used in the send.
	Push Send Name	Dimension	The name of the send definition. For Mobile Studio sends: the Message Name, for Transactional API sends: the DefinitionKey, for Journey Builder sends: the Activity Name.
	Push Send Type	Dimension	The type of message sent: • User-Initiated — The message was sent via Mobile Studio. • API Triggered — The message was triggered via an API event. • Automation Studio — The message was sent via Automation Studio. • Journey — The message was sent via Journey Builder.

Category	Field Name	Type	Description
	Push Send ID	Dimension	The unique identifier for the send definition, the Send Name. This is a separate identifier from the job ID.
	Push Title	Dimension	The title used in the message content that's shown to the end user.
Push Notification Delivery	Push Sends	Measurement	The number of push notifications sent per device.
	Push Bounces	Measurement	The total number of messages rejected by Apple or Google. Bounces often occur as a result of invalid push tokens or invalid sending credentials.
	Push Deliveries	Calculated Measurement	The total number of messages accepted by Apple or Google.
	Push Bounce Rate	Calculated Measurement	Percentage of messages rejected by Apple or Google. Calculation: (Bounces) / (Sends).
	Push Delivery Rate	Calculated Measurement	Percentage of messages accepted by Apple or Google. Calculation: (Deliveries) / (Sends).
	Push Not Sent	Measurement	The sum of failures for sends.
Push Notification Engagement	Push Opens	Measurement	The total number of messages opened. • Push messages can only be opened one time per device. • The timestamp for open events is according to the end user's device. • In some cases it can take a few days for an open event to be reported to Intelligence Reports. Therefore, open events that occurred 21 days before the event reached Intelligence Reports are omitted. • The Push Message Summary Report can show more

Category	Field Name	Type	Description
			opens than Intelligence Reports because it doesn't take duplicate opens into account.
	Push Open Rate	Calculated Measurement	Percentage of messages opened. Calculation: (Opens) / (Deliveries). Available for calculations at the device level.

In-App Dimensions and Measurements

In-app data is collected from the moment of provisioning, so historical data isn't tracked. In some cases, events such as clicks or dismisses of sends that occurred before provisioning can appear in the data. In these situations, no send date is assigned to these events, and they're filtered out of the dashboards.

Category	Field Name	Type	Description
In-App Attributes	In-App Content Name	Dimension	The name of the content (from Content Builder) that was used within the send. For Journey Builder Sends, the Content Asset Name=In-App Content Name.
	In-App Send Name	Dimension	The name of the message for the marketer to reference. For Journey Builder Sends, the Journey Builder Activity Name=In-App Send Name.
	In-App Send Type	Dimension	The type of message sent: - User-Initiated — The message was sent via Mobile Studio. - API Triggered — The message was triggered via an API event. - Automation Studio — The message was sent via Automation Studio. - Journey — The message was sent via Journey Builder.
	In-App Send ID	Dimension	The unique identifier for the Send Name. This isn't the job ID. For Journey Builder Sends, the MessageID=In-App Send ID.

Category	Field Name	Type	Description
	In-App Title	Dimension	The title used in the message content that's shown to the end user.
	In-App Message Layout	Dimension	The layout of the in-app message: Banner, Full Page, and Modal.
	In-App Button ID	Dimension	The ID of the button. Note: This is only relevant for clicks.
	In-App Button Label	Dimension	The label of the clicked button.
	In-App Dismiss Type	Dimension	If a dismiss event occurred, this metric indicates the type. Possible values are AutoDismiss, ButtonClicked, or Closed.
In-App Delivery Attributes	In-App Unique Sends	Measurement	The unique sum of sends successfully rendered (Successful Published); calculated at the Contact level.
	In-App Device Deliveries	Measurement	The number of downloads by devices. This number is typically higher than the number of Unique Sends. Sends are calculated by contact, this metric is calculated by device. The difference arises when contacts have more than one device.
	In-App Device Displays	Measurement	The total in-app displays per device.
	In-App Device Display Rate	Measurement	The device display rate. Calculation: (Device Displays / Device Deliveries)
	In-App Device Button Clicks	Measurement	Total button clicks across devices.
	In-App Device Button Click Rate	Measurement	The device button click rate. Calculation: (Device Button Clicks / Device Displays)
	In-App Device Dismisses	Measurement	The total number of times the dismiss button was clicked across devices.

Category	Field Name	Type	Description
	In-App Device Dismiss Rate	Measurement	The device dismiss rate. Calculation: (Device Dismisses / Device Displays)
	In-App Avg. Display Time	Measurement	The average amount of time the in-app message was displayed. Calculation: (Total time in app / device displays)

WhatsApp Dimensions and Measurements

WhatsApp data is collected from the moment of provisioning, so historical data isn't tracked. In some cases, events such as clicks or dismisses of sends that occurred before provisioning can appear in the data. In these situations, no send date is assigned to these events, and they're filtered out of the dashboards.

Category	Field Name	Type	Description
Time Attributes	Event Date (Event Date, Event Month, Event Week, Event Quarter, Event Weekday, Event Year)	Dimension	The actual date when this event occurred
	Send Date (Send Date, Send Month, Send Week, Send Quarter, Send Weekday, Send Year)	Dimension	The date the originating message was sent.
Enterprise or Business Unit	Business Unit	Dimension	The name of the Marketing Cloud Engagement ID that sent the message.
	Business Unit ID	Dimension	The ID of the Marketing Cloud Engagement ID.
	Enterprise ID	Dimension	The ID of the enterprise account.
Journey Attributes (Available only if you have Journey Builder enabled in your account.)	Journey ID	Dimension	The internal unique identifier of the journey and its version.
	Journey Name	Dimension	The journey name. Note: For Push data, not all messages are assigned a journey name.
	Journey Version	Dimension	The journey version.
	Journey Status	Dimension	The journey status: Draft, Running, Paused, Finishing, or Stopped.
	Journey Activity Name	Dimension	The journey activity name.

Category	Field Name	Type	Description
	Journey Activity Type	Dimension	The journey activity type.
	Journey Description	Dimension	The journey description.
	Journey Created Date	Dimension	The date the journey was created.
	Journey Last Published Date	Dimension	The last date that the journey was published.
	Journey Modified Date	Dimension	The last date that the journey was modified.
	Contact Entry Mode	Dimension	This mode dictates when the contact is eligible to enter a journey.
Audience Attributes (Not available for triggered mobile push messages, or in-app messages.)	Audience Name	Dimension	The audience name that the email or message was sent to. The audience name refers to the Publication List for Journey sends. Note: Only 1 audience is supported.
	Audience Type	Dimension	The audience type: List or Data Extension.
Campaign Attributes	Campaign	Dimension	The Marketing Cloud Engagement campaign at the time of the send (if assigned). Note: Only 1 campaign is supported.
	Campaign ID	Dimension	The campaign's internal ID.
	Campaign Code	Dimension	The campaign's code, as given by the user.
	Campaign Start Date	Dimension	The campaign's start date.
	Campaign End Date	Dimension	The campaign's end date.
	Campaign Status	Dimension	The campaign's status.
WhatsApp Attributes	WhatsApp Activity Name	Dimension	Name of WhatsApp message activity that was used for the send in the journey. For Journey Builder Sends, the Content Asset Name=In-App Content Name.

Category	Field Name	Type	Description
	WhatsApp Content ID	Dimension	The asset ID associated with the Send for every WhatsApp activity within a Journey. Available on Send type only.
	WhatsApp Send Name	Dimension	The name of the message for the marketer to reference. For Journey Builder Sends, the Journey Builder Activity Name=In-App Send Name.
	WhatsApp Send Type	Dimension	The type of message sent: • API Triggered—The message was triggered via an API event. • Journey—The message was sent via Journey Builder.
	WhatsApp Business Account	Dimension	WhatsApp business account name.
	WhatsApp Error Status	Dimension	Error status description or error code
	WhatsApp Conversation Type	Dimension	The category defined for the conversation, as follows: • 2 = Referral • 3 = Marketing • 4 = Utility • 5 = Authentication • 6 = Service
	WhatsApp Country	Dimension	The 2-character ISO Locale of the Mobile Number (from the recipient address) in a given send.
Channel Attributes	WhatsApp Channel ID	Dimension	Phone number of the registered channel.
	WhatsApp Channel Name	Dimension	The name used to send messages. When multiple messages are sent to the same number.

Category	Field Name	Type	Description
WhatsApp Delivery	WhatsApp Sends	Measurement	The number of messages sent. A Customer sends messages to 1,000 unique contacts in a journey.
	WhatsApp Deliveries	Measurement	The number of messages with a Delivered Status from Meta. 940 messages delivered with a "Delivered status" received from META.
	WhatsApp Delivery Rate	Calculated Measurement	WhatsApp Deliveries ÷ WhatsApp Sends
	WhatsApp Bounces	Calculated Measurement	Sends - Deliveries
	WhatsApp Bounce Rate	Calculated Measurement	Bounces ÷ Sends
	WhatsApp Bounce—Not Sent	Measurement	Rejected before delivered to the device. 10 messages were rejected or undelivered because 10 users didn't have the WhatsApp app
	WhatsApp Bounce—Not Sent Rate	Calculated Measurement	WhatsApp Bounces—Not Sent ÷ WhatsApp Sends
	WhatsApp Bounce—Failures	Measurement	The sum of messages with a Failed status from Meta. This measurement must be associated with the status reason.
	WhatsApp Bounce—Failures Rate	Calculated Measurement	WhatsApp Bounce—Failures ÷ WhatsApp Sends
WhatsApp Engagement	WhatsApp Opens	Measurement	No. of messages Seen or Read. 900 messages were opened or read with a "Read status" received from META
	WhatsApp Open Rate	Calculated Measurement	WhatsApp Opens ÷ WhatsApp Deliveries

Send Date Versus Event Date

All engagement events in Intelligence Reports have two date dimensions: Event, and send.

- Event date - The date the event occurred (for example, email opened).

- Send date - The date the message for this event was sent.
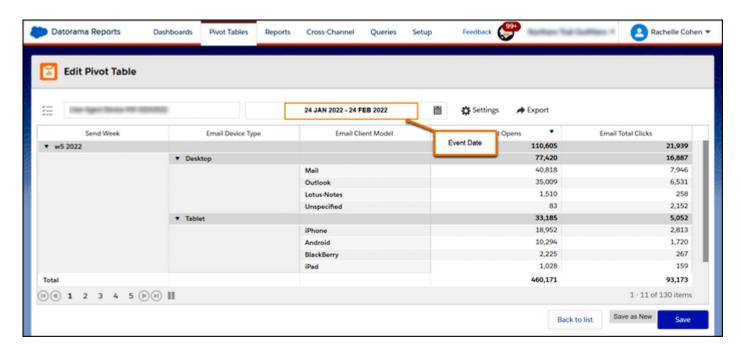
The two date dimensions are especially important when looking at opens and clicks. For example, when reporting on clicks or opens, setting the Event Date filter to the last 30 days without setting a Send Date filter returns data for all emails that were clicked during the last 30 days, regardless of when they were sent. The results could include emails that were sent 31 or more days earlier.
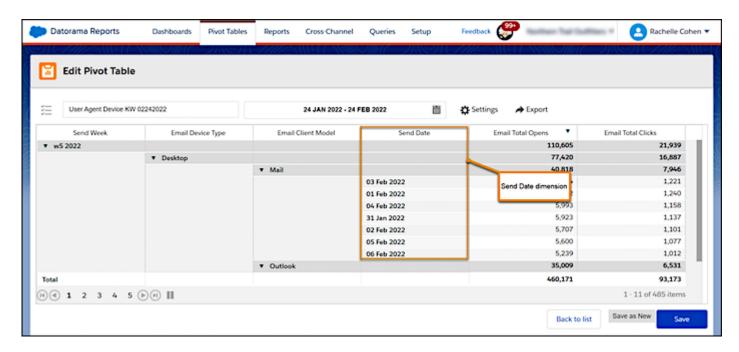
Both date dimensions are used in Intelligence Reports but appear differently in pivot tables, reports, and dashboards.
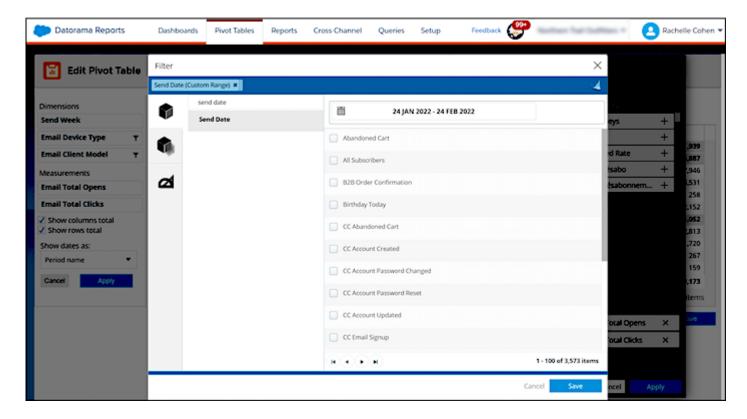
Pivot Tables — All pivot tables have an Event Date filter. When selecting the date range, all events from the specified time are included, regardless of the send date.
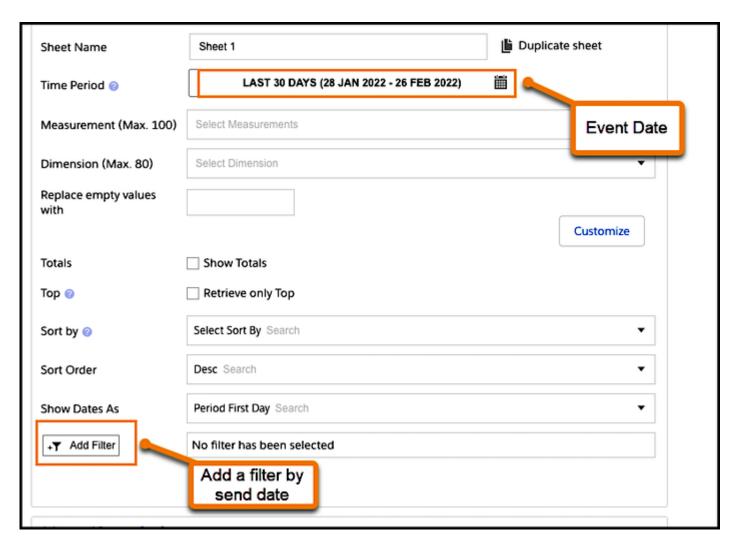
To see the number of events that occurred since the send date, add the Send Date dimension to your pivot table.

Available in: Intelligence Reports and Intelligence Reports Advanced

You can also filter your pivot table to include only send dates. Create a filter using the Send Date dimension. For more information, see Applying Filters to Pivot Tables and Reports on page 134.
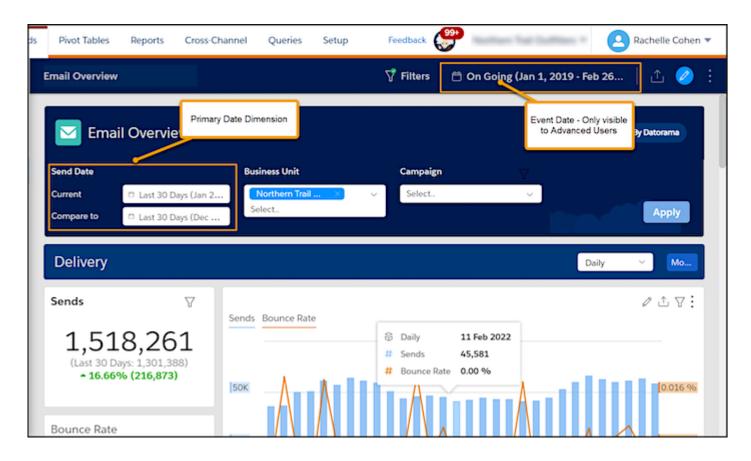
Reports — All reports have an Event Date filter. When selecting the date range, all events from the specified time are included.

To filter your report to include only certain send dates, create a filter using the Send Date dimension. For more information, see Applying Filters to Pivot Tables and Reports on page 134.

Dashboards — For out-of-the-box dashboards, you can control only the send date. The event date filter is preset to include all dates.

If you're a Intelligence Reports Advanced user, you can control the event date at the top of the page and build the dashboard according to your needs. For more information, see Customize Dashboard Pages on page 105.

Dashboards

Dashboards provide an out-of-the box view of your Email, Push, and Journey data. With dashboards, you gain valuable insights and can quickly identify trends or anomalies. With the premium Advanced version, you can also create and edit dashboards.

All dashboards contain dimensions and measurements to analyze your data. For more information, see Dimensions and Measurements

📝 **Note:** If you're having trouble loading dashboards, make sure you allowlist the Intelligence Reports domain/IP addresses for Intelligence Reports. For more information, see IP Addresses for Inclusion on Allowlists in Marketing Cloud.

For more information about dashboards, click these links:

EDITIONS

Available in: Intelligence Reports and Intelligence Reports Advanced

Pre-Configured Dashboards

Intelligence Reports for Engagement's pre-configured dashboards provide valuable insights and help you quickly identify trends or anomalies.

Create and Configure Dashboards

In Intelligence Reports Advanced you can create and customize dashboards to meet your business needs.

Apply Filters to Dashboards

Filters enable you to focus on the data most relevant to you. When you select a filter in a dashboard, it applies to all dashboards.

Sharing Dashboard Pages and Widgets

Slack provides seamless collaboration with colleagues and clients. Marketing teams can work together and communicate on campaigns and improve cross-functional work. You can share dashboards and widgets via Slack, email, or as downloaded local files. You can also schedule when to share reports.

Pre-Configured Dashboards

Intelligence Reports for Engagement's pre-configured dashboards provide valuable insights and help you quickly identify trends or anomalies.

📝 Note:

- All dashboards and their components refer to the send date, not the event date. If you want a report to refer to the event date, create a pivot table.
- All dashboards exclude test emails.
- Emails configured to Suppress from Send Reports aren't included in Intelligence Reports.

These dashboards are available to you:

Email Overview Dashboard

Get a high-level overview of your email campaigns, such as the number of emails sent, the open rate, delivery and engagement, and the top- and bottom-performing journey emails.

Email Deliveries Dashboard

View your email delivery data, including key performance indicators (KPIs) such as sends, deliveries and bounces, and delivery timelines.

Email Engagement Dashboard

A detailed look into your email engagement key performance indicators (KPIs), including opens, clicks, unsubscribes, and engagement timelines.

Email Performance Dashboard

Get details of your email send data, including the open rate, click rate, unsubscribe rate, and performance funnel.

Journey Performance by Email Dashboard

Get an in-depth view into your email journey and activities performance data. It also provides a breakdown by domain, day of the week, and audience.

Push Deliveries Dashboard

View your push notification delivery data and timelines. Get breakdowns by day of the week, mobile OS, and mobile app.

Push Engagement Dashboard

Get details about your push notification engagement key performance indicators (KPIs), including deliveries, opens, and open rate. View breakdowns by day of the week, mobile OS, and mobile apps. You can export the dashboard and its widgets into different formats.

Push Performance Dashboard

Get details about your push performance, including an overview of push sends, by looking at deliveries, delivery rate, and bounces. View breakdowns by day of week, mobile OS, and mobile app.

Journey Performance by Push Dashboard

View your journey and push notification performance data. View breakdowns by day of the week, mobile OS, and mobile app.

In-App Deliveries Dashboard

View your in-app delivery data including unique sends, message deliveries, device displays, and display rate. Get breakdowns by day of the week, mobile operating system, and mobile app.

In-App Engagement Dashboard

Get details about your in-app engagement key performance indicators (KPIs), including device button clicks, device dismisses, device button click rate and more. View breakdowns by day of the week, mobile OS, and mobile apps. You can export the dashboard and its widgets into different formats.

In-App Performance Dashboard

Get details about your in-app message performance, including an overview of sends, by looking at deliveries, display rate, and dismisses. View breakdowns by day of week, mobile OS, and mobile app.

Journey Performance by In-App Dashboard

View your journey and in-app message performance data. View breakdowns by day of the week, mobile operating system, and mobile app.

WhatsApp Deliveries Dashboard

View your WhatsApp delivery data including sends, deliveries, and delivery rates. Get breakdowns by day of the week, WhatsApp business account, and WhatsApp channel name.

WhatsApp Engagement Dashboard

Get details about your WhatsApp engagement key performance indicators (KPIs), including the number of messages opened and the message open rate. View breakdowns by day of the week, WhatsApp business account, and WhatsApp channel name. You can export the dashboard and its widgets into different formats.

WhatsApp Performance Dashboard

Get details about your WhatsApp message performance, including an overview of sends, by looking at deliveries, bounce rate, and open rate. View breakdowns by day of the week, WhatsApp business account, WhatsApp channel name, WhatsApp send name, and locale.

Journey Performance by WhatsApp Dashboard

View your journey and WhatsApp message performance data. View breakdowns by day of the week, WhatsApp business account, WhatsApp channel name, Journey name, Journey version, and Journey activity name.

Email Overview Dashboard

Get a high-level overview of your email campaigns, such as the number of emails sent, the open rate, delivery and engagement, and the top- and bottom-performing journey emails.

You can filter the email overview dashboard by:

- Send date
- Business unit
- Campaign

After you select the filters, click **Apply**. Each section in this dashboard has a **View More** button that takes you to the corresponding dashboard for more details.

The email overview dashboard contains these sections:

- Delivery — Get a snapshot of how your email campaigns are performing in terms of sends and bounce rate.
    - Sends — A graph that shows the number of emails sent within the filtered time period.
    - Bounce Rate — A graph that shows the percentage of emails that didn't reach the intended recipient.
    - Timeline Graph — A graph that shows sends and bounce rates over time.

EDITIONS

Available in: Intelligence Reports and Intelligence Reports Advanced

- Engagement — An overview of how your email campaigns are performing in terms of email opens. Open related measurements may not accurately reflect engagement. Tell me more.

  - Open Rate — The percentage of emails opened within the filtered time period.

  - Click to Open Rate — The rate of unique clicks to unique opens. This rate indicates how effective the email message, design, and content performed, and whether it encouraged the recipient to act.

  - Delivery & Engagement Timeline — A graph that shows the open rate and the click-to-open rate.

- Email Performance — Your email performance data.

  - Conversion Funnel — Provides insight into the success of your email campaigns.

  - Engagement Distribution — Your top 10 emails shown in a bubble chart. The x axis represents the open rate and the y axis represents the click to open rate. An optimum email has the following traits:

    - A high number of sends — The larger the bubble, the higher number of sends.

    - A high open rate and a high click-to-open rate appear at the top right corner of the graph.

    The least desirable result is a large bubble in the bottom left corner of the graph because it indicates a high send rate with a low open and click-to-open rate.

- Journey Performance by Email–Journey performance data. Only available if you have Journey Builder enabled in your account.

  - Top five journeys–The top five email journeys by open rate.

  - Bottom five journeys–The bottom five email journeys by open rate.

Email Deliveries Dashboard

View your email delivery data, including key performance indicators (KPIs) such as sends, deliveries and bounces, and delivery timelines.

You can filter the email deliveries dashboard by:

- Send date

- Business unit

- Campaign

After you select the filters, click **Apply**.

The email deliveries dashboard contains these sections:

- **Delivery KPIs** – The top three KPIs for email deliveries within the filtered time period.

  > 📝 Note: Each section shows how the measurement performed in the previous period and whether it increased or decreased compared to the current period. You can define the compare to period in the send date filter.

  These KPIs include:

  - **Sends** – The number of emails sent.

  - **Deliveries** – The number of emails delivered.

  - **Bounce Rate** – The percentage of the number of emails that didn't reach the intended recipient.

- **Delivery Timeline** – The selected measurements over a timeline. You can also select the granularity that you want to filter the graph by, for example, daily.

- **Breakdowns** – An analysis of the selected measurement.

  - **By Email Domain** – A bar graph that shows the selected measurement divided by email domain.

EDITIONS

Available in: Intelligence Reports and Intelligence Reports Advanced

- **By Day of the Week** – A table that shows how the selected measurement performed each day of the week. This table can help you determine the best day to optimize your email campaigns.
  - **By Audience** – A table that shows how each measurement performed per audience.
- **Details** – A table of your top 100 emails sent within the defined time frame, according to the selected measurement.

  📝 Note: You can sort each column in the table by ascending or descending order.

Email Engagement Dashboard

A detailed look into your email engagement key performance indicators (KPIs), including opens, clicks, unsubscribes, and engagement timelines.

You can export the dashboard and its widgets into different formats.

You can filter the email overview dashboard by:

- Send date
- Business unit
- Campaign

After you select the filters, click **Apply**.

The email engagement dashboard contains these sections:

<div style="float:right">

EDITIONS

Available in: Intelligence Reports and Intelligence Reports Advanced

</div>

- **Engagement KPIs** – The top KPIs for email engagement within the filtered time period. These KPIs include opens, clicks, unsubscribes, the open rate, the click-to-open rate, and the unsubscribe rate.

  📝 Note:
  - Opens, clicks, and unsubscribe metrics refer to uniques, not totals.
  - Open related measurements may not accurately reflect engagement. Tell me more.
  - Each section shows how the measurement performed in the previous period and whether it increased or decreased compared to the current period.

- **Engagement Timeline** – Emails with the best engagement for the defined time period. Select the measurement you want to display in the graph. You can also select the granularity you want to filter the graph by, such as monthly.
- **Breakdowns** – An analysis of the selected measurement.
  - **By Email Domain** – A bar graph that shows the selected measurement divided by email domain.
  - **By Day of the Week** – A table that shows how the selected measurement performed each day of the week. This table can help you determine the best day to optimize your email campaigns.
  - **By Audience** – A table that shows how each measurement performed per audience.
- **Details** – A table of your top 100 emails sent within the defined time frame, according to the selected measurement.

  📝 Note: Each column in the table can be sorted by ascending or descending order.

Email Performance Dashboard

Get details of your email send data, including the open rate, click rate, unsubscribe rate, and performance funnel.

You can filter the email performance dashboard by:

- Send date
- Business unit
- Campaign
- Email name
- Email subject

After you select the filters, click **Apply**.

The email performance dashboard contains these sections:

- **Email Sends** – A table that shows how your emails performed according to the measurements you selected.

  > **Note:** Open related measurements may not accurately reflect engagement. Tell me more.

- **Breakdowns** – An analysis of the selected measurement.
  - **By Email Domain** – A bar graph that shows the selected measurement divided by email domain.
  - **By Day of the Week** – A table that shows how the selected measurement performed each day of the week. This table can help you determine the best day to optimize your email campaigns.
  - **By Audience** – A table that shows how each measurement performed per audience.

EDITIONS

Available in: Intelligence Reports and Intelligence Reports Advanced

Journey Performance by Email Dashboard

Get an in-depth view into your email journey and activities performance data. It also provides a breakdown by domain, day of the week, and audience.

> **Note:** Only available if you have Journey Builder enabled in your account.

You can filter the journey performance by email dashboard by:

- Send date
- Business unit
- Campaign
- Journey name
- Journey version
- Journey activity name

After you select the filters, click **Apply**.

The journey performance by email dashboard contains these sections:

- **Journeys & Activities** – A pivot table that shows how your journeys performed according to the measurements you selected. It can help you quickly compare your journey performances to identify which journeys are performing the best or worst.

  > **Note:** Open related measurements may not accurately reflect engagement. Tell me more.

- **Breakdowns** – An analysis of the selected measurement.
  - **By Email Domain** – A bar graph that shows the selected measurement divided by email domain.

EDITIONS

Available in: Intelligence Reports and Intelligence Reports Advanced

- **By Day of the Week** – A table that shows how the selected measurement performed each day of the week. This table can help you determine the best day to optimize your email campaigns.
- **By Audience** – A table that shows how each measurement performed per audience.

Push Deliveries Dashboard

View your push notification delivery data and timelines. Get breakdowns by day of the week, mobile OS, and mobile app.

📝 **Note:** This dashboard includes push notification sends. It doesn't include inbox or in-app sends.

You can filter the push deliveries dashboard by:

- Send date
- Business unit
- Campaign
- Mobile OS
- Mobile app

After you select the filters, click **Apply**.

The push deliveries dashboard contains these sections:

- **Delivery KPIs** — Top three KPIs for email deliveries within the filtered time period. These KPIs include:
    - **Sends** — Total number of messages sent from Marketing Cloud Engagement to Apple or Google.
    - **Deliveries** — Total number of messages accepted by Apple or Google.
    - **Bounce Rate** — Percentage of messages rejected by Apple or Google. Calculation: (Bounces) / (Sends).

    📝 **Note:** Each section shows how the measurement performed in the previous period and whether it increased or decreased. You can define the **compare to period** with the send date filter.

- **Delivery Timeline** — Displays the selected measurements over a timeline. You can also select the granularity that you want to filter the graph by, for example, sends.
- **Breakdowns** — This section shows an analysis of the selected measurement.
    - **By Day of the Week** — A table that shows how the selected measurement performed each day of the week. This table can help you determine the best day to optimize your push notifications.
    - **By Mobile OS** — A bar graph that shows the selected measurement divided by the mobile operating system.
    - **By Mobile App** – A table that shows how each measurement performed per mobile app.

- **Audience Details** — A table that displays your audience details according to type, sends, deliveries and bounce rate. Audience Name refers to the name of the audience. Audience Type refers to a list or data extension.
- **Send Details** — A table of your top-100 push notifications sent within the defined time frame, according to the selected measurement.

Push Engagement Dashboard

Get details about your push notification engagement key performance indicators (KPIs), including deliveries, opens, and open rate. View breakdowns by day of the week, mobile OS, and mobile apps. You can export the dashboard and its widgets into different formats.

📝 **Note:** This dashboard includes push notification sends. It doesn't include inbox or in-app sends.
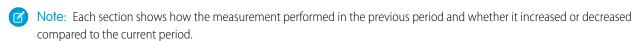
You can filter the push engagement dashboard by:

- Send date
- Business unit
- Campaign
- Mobile OS
- Mobile app

After you select filters, click **Apply**.

The push engagement dashboard contains these sections:

- **Engagement KPIs** — The top KPIs for push engagement within the filtered time period. These KPIs include opens, and open rate.
    - **Opens** - The total number of messages opened.
    - **Open Rate** - The percentage of messages opened. Calculation: (Opens) / (Deliveries)

    📝 **Note:** Each section shows how the measurement performed in the previous period and whether it increased or decreased compared to the current period.

- **Engagement Timeline** — A graph that shows pushes with the best engagement for the defined time period.
- **Breakdowns** — An analysis of the selected measurement.
    - **By Day of the Week** — A table that shows how the selected measurement performed for each day of the week. This table can help you determine the best day to optimize your push notifications.
    - **By Mobile OS** – A bar graph that shows the selected measurement divided by the mobile operating system.
    - **By Mobile App** — A table that shows how each measurement performed per mobile app.

- **Audience Details** — A detailed list of your audience's engagement according to type, deliveries, opens and open rate. Audience Name refers to the name of the audience. Audience Type refers to a list or data extension.
- **Send Details** — A table of your top 100 pushes sent within the defined time frame, according to the selected measurement.

    📝 **Note:** Each column in the table can be sorted by ascending or descending order.

Push Performance Dashboard

Get details about your push performance, including an overview of push sends, by looking at deliveries, delivery rate, and bounces. View breakdowns by day of week, mobile OS, and mobile app.

📝 **Note:** This dashboard includes push notification sends. It doesn't include inbox or in-app sends.

You can filter the push performance dashboard by:

- Send date

- Business unit
- Campaign
- Mobile app
- Mobile device OS
- Push send name
- Push title

After you select filters, click **Apply**.

The push performance dashboard contains these sections:

- **Push Sends** — A graph that shows a view of push performance. Turn on or off these dimensions and measurements: sends, deliveries, delivery rate, bounces, bounce rate, opens, and open rate.
- **Breakdowns** — An analysis of the selected measurement.
  - **By Day of the Week** — A table that shows how the selected measurement performed for each day of the week. This table can help you determine the best day to optimize your push notifications.
  - **By Mobile OS** – A bar graph that shows the selected measurement divided by the mobile operating system.
  - **By Mobile App** — A table that shows how each measurement performed per mobile app.
- **Audience Details** — A detailed list of your audience's engagement according to type, sends, bounce rate and open rate. Audience Name refers to the name of the audience. Audience Type refers to a list or data extension.

Journey Performance by Push Dashboard

View your journey and push notification performance data. View breakdowns by day of the week, mobile OS, and mobile app.

> **Note:** Only available if you have Journey Builder enabled in your account.

> **Note:** This dashboard includes push notification sends. It doesn't include inbox or in-app sends.

You can filter the journey performance by push dashboard by:

- Send date
- Business unit
- Campaign
- Mobile OS
- Mobile app
- Journey name
- Journey version
- Journey activity name

After you select filters, click **Apply**.

The journey performance by push dashboard contains these sections:

- **Journeys & Activities** — A pivot table that shows how your journeys performed according to measurements. Use the pivot table to compare your journey performances.
- **Breakdowns** — An in-depth analysis of the measurement that you selected.

- **By Day of the Week** —— A table that shows how the selected measurement performed on each day of the week. This table can help you determine the best day to optimize your push notifications.
  - **By Mobile OS** —— A bar graph that shows the selected measurement divided by mobile operating system.
  - **By Mobile App** —— A table that shows how each measurement performed per mobile app.

- **Audience Details** —— A detailed list of your audience's engagement according to type, deliveries, opens, and open rate. Audience Name refers to the name of the audience. Audience Type refers to a list or data extension.

  📝 **Note:** Audience data isn't available for triggered mobile push messages.

In-App Deliveries Dashboard

View your in-app delivery data including unique sends, message deliveries, device displays, and display rate. Get breakdowns by day of the week, mobile operating system, and mobile app.

You can filter the in-app deliveries dashboard by:

- Send date
- Business unit
- Campaign
- Mobile OS
- Mobile app

After you select the filters, click **Apply**.

The in-app deliveries dashboard contains these sections:

- **Delivery KPIs**—Top KPIs for message deliveries within the filtered time period. These KPIs include:
  - **Unique Sends** —The unique sum of sends that were successfully rendered.
  - **Device Deliveries**—The number of downloads by devices.
  - **Device Displays** —The total in-app displays per device.
  - **Device Display Rate**—The device display rate. Calculation: (Device Displays / Device Deliveries).

    📝 **Note:** Each section shows how the measurement performed in the previous period and whether it increased or decreased. You can define the compare to period with the send date filter.

- **Delivery Timeline**—Displays the selected measurements over a timeline. You can also select the granularity that you want to filter the graph by, for example, unique sends.
- **Breakdowns**—This section shows an analysis of the selected measurement.
  - **By Day of the Week**—A table that shows how the selected measurement performed each day of the week. This table can help you determine the best day to optimize your push notifications.
  - **By Mobile OS**—A bar graph that shows the selected measurement divided by the mobile operating system.
  - **By Mobile App**—A table that shows how each measurement performed per mobile app.
- **Send Details**—A table of your top-100 in-app messages within the defined time frame, according to the selected measurement.

EDITIONS

Available in: Intelligence Reports and Intelligence Reports Advanced

In-App Engagement Dashboard

Get details about your in-app engagement key performance indicators (KPIs), including device button clicks, device dismisses, device button click rate and more. View breakdowns by day of the week, mobile OS, and mobile apps. You can export the dashboard and its widgets into different formats.

You can filter the in-app engagement dashboard by:

- Send date
- Business unit
- Campaign
- Mobile OS
- Mobile app

After you select the filters, click **Apply**.

In-app engagement dashboard contains these sections:

- **Engagement KPIs** —The top KPIs for in-app engagement within the filtered time period.
  - **Device Button Clicks**—The number of times the message was clicked across devices.
  - **Device Dismisses**—The total number of times the dismiss button was clicked across devices.
  - **Device Button Click Rate**—The device button click rate. Calculation: (Device Button Clicks / Device Displays)
  - **Device Dismiss Rate**—The number of device dismisses. Calculation: (Device Dismisses / Device Displays)
  - **Avg. Display Time**—The average amount of time the in-app message was displayed.

    Note: Each section shows how the measurement performed in the previous period and whether it increased or decreased. You can define the compare to period with the send date filter.

- **Engagement Timeline** —A graph that shows in-app messages with the best engagement for the defined time period.
- **Breakdowns**—This section shows an analysis of the selected measurement.
  - **By Day of the Week**—A table that shows how the selected measurement performed each day of the week. This table can help you determine the best day to optimize your push notifications.
  - **By Mobile OS**—A bar graph that shows the selected measurement divided by the mobile operating system.
  - **By Mobile App**—A table that shows how each measurement performed per mobile app.

- **Send Details**—A table of your top-100 in-app messages within the defined time frame, according to the selected measurement.

In-App Performance Dashboard

Get details about your in-app message performance, including an overview of sends, by looking at deliveries, display rate, and dismisses. View breakdowns by day of week, mobile OS, and mobile app.

You can filter the in-app performance dashboard by:

- Send date
- Business unit
- Campaign
- Mobile app
- Mobile OS

- In app send name
- In app send title

After you select the filters, click **Apply**.

The In-app performance dashboard contains these sections:

- **In-App Message Sends** — A graph that shows a view of in-app performance. Turn on or off these dimensions and measurements: unique sends, device deliveries, device displays, device display rates, device button clicks, device button click rates, device dismisses, device dismiss rates and average display times.
- **Breakdowns**—This section shows an analysis of the selected measurement.
    - **By Day of the Week**—A table that shows how the selected measurement performed each day of the week. This table can help you determine the best day to optimize your push notifications.
    - **By Mobile OS**—A bar graph that shows the selected measurement divided by the mobile operating system.
    - **By Mobile App**—A table that shows how each measurement performed per mobile app.

Journey Performance by In-App Dashboard

View your journey and in-app message performance data. View breakdowns by day of the week, mobile operating system, and mobile app.

> **Note:** Only available if you have Journey Builder enabled in your account.

You can filter the journey performance by in-app dashboard by:

- Send date
- Business unit
- Campaign
- Mobile OS
- Mobile app
- Journey name
- Journey version
- Journey activity name

After you select the filters, click **Apply**.

The journey performance by in-app dashboard contains these sections:

- **Journeys & Activities** — A pivot table that shows how your journeys performed according to measurements. Use the pivot table to compare your journey performances.
- **Breakdowns**—This section shows an analysis of the selected measurement.
    - **By Day of the Week**—A table that shows how the selected measurement performed each day of the week. This table can help you determine the best day to optimize your push notifications.
    - **By Mobile OS**—A bar graph that shows the selected measurement divided by the mobile operating system.
    - **By Mobile App**—A table that shows how each measurement performed per mobile app.

WhatsApp Deliveries Dashboard

View your WhatsApp delivery data including sends, deliveries, and delivery rates. Get breakdowns by day of the week, WhatsApp business account, and WhatsApp channel name.

You can filter the WhatsApp deliveries dashboard by:

- Send date
- Business unit
- Campaign
- WhatsApp business account
- WhatsApp channel name

After you select the filters, click **Apply**.

The WhatsApp deliveries dashboard contains these sections.

- **Delivery KPIs**—Top KPIs for message deliveries within the filtered time period. These KPIs include:
  - **Sends**—The sum of sends that were successfully rendered.
  - **Deliveries**—The number of messages received.
  - **Delivery Rate**— The message delivery rate. Calculation: Sends ÷ Deliveries.
  - Note: Each section shows how the measurement performed in the previous period and whether it increased or decreased. You can define the compare to period with the send date filter.

- **Bounce KPIs**—Top KPIs for the number of messages that didn't reach the intended recipient within the filtered time period. These KPIs include:
  - **Bounces**—The sum of messages that weren't successfully rendered.
  - **Bounce Rate**—The percentage of messages that didn't reach the intended recipient.
  - **Bounce - Not Sent**—The sum of messages that weren't successfully sent.
  - **Bounce - Not Sent Rate**—The percentage of the number of messages that weren't successfully sent.
  - **Bounce Failures**—The sum of messages that failed to send.
  - **Bounce Failures Rate**—The percentage of the number of messages that failed to send.

- **Delivery Timeline**—Shows the selected measurements over a timeline. You can also select the granularity that you want to filter the graph by, for example, sends.

- **Breakdowns**—This section shows an analysis of the selected measurement.
  - **By Day of the Week**—A table that shows how the selected measurement performed each day of the week. This table can help you determine the best day to optimize your push notifications.
  - **By Locale**—A pie chart that shows the selected measurement divided by the locale.
  - **By Conversation Type**—A table that shows how each measurement is performed per conversation type.

- **Send Details**—A table of your top-100 WhatsApp messages within the defined time frame, according to the selected measurement.

WhatsApp Engagement Dashboard

Get details about your WhatsApp engagement key performance indicators (KPIs), including the number of messages opened and the message open rate. View breakdowns by day of the week, WhatsApp business account, and WhatsApp channel name. You can export the dashboard and its widgets into different formats.

You can filter the WhatsApp engagement dashboard by:

- Send date
- Business unit
- Campaign
- WhatsApp business account
- WhatsApp channel name

After you select the filters, click **Apply**.

The WhatsApp engagement dashboard contains these sections:

- **Engagement KPIs** —The top KPIs for WhatsApp engagement within the filtered time period.
  - **Opens**—The total number of messages opened.
  - **Open Rate**—The percentage of messages opened. Calculation: Opens ÷ Deliveries

    📝 Note: Each section shows how the measurement performed in the previous period and whether it increased or decreased compared to the current period.

- **Engagement Timeline** —A graph showing WhatsApp messages with the best engagement for the defined period.
- **Breakdowns**—An analysis of the selected measurement.
  - **By Day of the Week**—A table that shows how the selected measurement performed for each day of the week. This table can help you determine the best day to optimize your push notifications.
  - **By Locale**—A pie chart that shows the selected measurement divided by the mobile operating system.
  - **By Conversation Type**—A table that shows how each measurement performed per conversation type.
- **Send Details**—A table of your top 100 WhatsApp messages sent within the defined time frame, according to the selected measurement

EDITIONS
Available in: Intelligence Reports and Intelligence Reports Advanced

WhatsApp Performance Dashboard

Get details about your WhatsApp message performance, including an overview of sends, by looking at deliveries, bounce rate, and open rate. View breakdowns by day of the week, WhatsApp business account, WhatsApp channel name, WhatsApp send name, and locale.

You can filter the WhatsApp performance dashboard by:

- Send date
- Business unit
- Campaign
- WhatsApp business account
- WhatsApp channel name
- WhatsApp send name
- Locale

EDITIONS
Available in: Intelligence Reports and Intelligence Reports Advanced

After you select the filters, click **Apply**.

The WhatsApp performance dashboard contains these sections:

- **WhatsApp Sends** — A pivot table that shows a view of WhatsApp performance. Turn on or off these dimensions and measurements: sends, bounce rate, and open rate.
- **Breakdowns**—An analysis of the selected measurement.
  - **By Day of the Week**—A table that shows how the selected measurement performed for each day of the week. This table can help you determine the best day to optimize your push notifications.
  - **By Locale**—A pie chart that shows the selected measurement divided by the mobile operating system.
  - **By Conversation type**—A table that shows how each measurement performed per conversation type.

Journey Performance by WhatsApp Dashboard

View your journey and WhatsApp message performance data. View breakdowns by day of the week, WhatsApp business account, WhatsApp channel name, Journey name, Journey version, and Journey activity name.

> **Note:** Only available if you have Journey Builder enabled in your account.

You can filter the journey performance by WhatsApp dashboard by:

- Send date
- Business unit
- Campaign
- WhatsApp business account
- WhatsApp channel name
- Journey name
- Journey version
- Journey activity name

After you select the filters, click **Apply**.

The journey performance by WhatsApp dashboard contains these sections.

- **Journeys & Activities** — A pivot table that shows how your journeys performed according to measurements. Use the pivot table to compare your journey performances.
- **Breakdowns**—An in-depth analysis of the measurement that you selected.
  - **By Day of the Week**—A table that shows how the selected measurement performed for each day of the week. This table can help you determine the best day to optimize your push notifications.
  - **By Locale**—A pie chart that shows the selected measurement divided by the mobile operating system.
  - **By Conversation type**—A table that shows how each measurement performed per conversation type.

EDITIONS
Available in: Intelligence Reports and Intelligence Reports Advanced

Create and Configure Dashboards

In Intelligence Reports Advanced you can create and customize dashboards to meet your business needs.

> **Note:** You can create up to 50 dashboards in Intelligence Reports Advanced.

EDITIONS
Available in: Intelligence Reports Advanced

If it's your first time creating dashboards, or you need a refresher, check out these short instructional videos:

- 📹 Watch a video

- 📹 Watch a video

Collections

Collections are like notebooks, and the pages inside the notebooks are what we call dashboard pages. Collections allow you to organize related dashboards together.

Dashboard Pages

Dashboard pages segment your collections so you can divide up your data according to your preferences. Each page can be customized and filtered, so you can modify the design and remove any unwanted data.

Collections

Collections are like notebooks, and the pages inside the notebooks are what we call dashboard pages. Collections allow you to organize related dashboards together.

Create a Collection

A collection contains your dashboard pages. After you create a collection, you can easily add dashboard pages to create a cohesive and full display of your data.

Manage a Collection

After you create a collection, you can edit the collection and its dashboard pages to fit your needs.

EDITIONS

Available in: Intelligence Reports Advanced

Create a Collection

A collection contains your dashboard pages. After you create a collection, you can easily add dashboard pages to create a cohesive and full display of your data.

1. From **Analytics Builder**, select **Intelligence [Datorama] Reports**.

2. Select the **Dashboards** tab.

3. Click the down arrow next to **Messaging & Journeys**.

4. Click **Create Collection**.

5. Name your collection, then add a description.

6. Save your work.

Your collections appear on the left pane. After you click a collection, the associated dashboard pages appear in the main screen.

EDITIONS

Available in: Intelligence Reports Advanced

USER PERMISSIONS

To create a collection
- Create & Edit

Manage a Collection

After you create a collection, you can edit the collection and its dashboard pages to fit your needs.

1. Click the collection you want to edit.

2. When you click the settings icon, these options appear:

   - **Rename** — Renames the collection.

   - **Delete** — Deletes the collection.

   - **Duplicate** — Creates a copy of the collection.

3. When selecting a collection, the dashboard pages from the collection appear in the window below it. You can edit the dashboard page settings by clicking the dashboard page. These options appear:

   - **Show Pages** — Click to view the dashboard pages associated with your collection.

   - **Edit** — Click to edit the dashboard page.

   - **Delete** — Click to delete this dashboard page.

   - **Export** — Click to export the dashboard page. The export formats available are:

     – PDF

     – PNG

     – Excel

     – PPT

   - **Update Dates** — Click to update the date ranges for the selected dashboard page.

   - **Copy** — Click to copy this dashboard page.

Dashboard Pages

Dashboard pages segment your collections so you can divide up your data according to your preferences. Each page can be customized and filtered, so you can modify the design and remove any unwanted data.

Add a Dashboard Page to a Collection

After you create a collection, you can add dashboard pages to suit your specific reporting needs. You can then add widgets to your dashboards to visualize and explore actionable insights.

Customize Dashboard Pages

Customizing your dashboard pages allows you to modify and focus on specific data in a view. You can apply filters and interactive filtersets to your dashboards to get a better understanding of the data that appears on your dashboard.

Add a Dashboard Page to a Collection

After you create a collection, you can add dashboard pages to suit your specific reporting needs. You can then add widgets to your dashboards to visualize and explore actionable insights.

> **Note:** You can create up to 50 dashboards in Intelligence Reports advanced.

1. Click the collection you want to add a dashboard page to.

2. Click **Add New**.

3. To enter **Edit** mode, click the pencil icon. In edit mode you can customize and add widgets to your dashboard page.

Customize Dashboard Pages

Customizing your dashboard pages allows you to modify and focus on specific data in a view. You can apply filters and interactive filtersets to your dashboards to get a better understanding of the data that appears on your dashboard.

Dashboard Page Filters

You can apply filters to dashboard pages to limit or modify the data in a view. You can filter by a dimension, measurement, or date dimension. Page level filters affect the page and the widgets on the filtered page. You can see if there are any filters applied to your page from the filters tab.

Interactive FilterSet

Interactive filtersets enable you to save various configured views of your dashboard page by saving the selections made to the interactive filter widgets. You can apply Filtersets as a filter option within the dashboard page.

Design Your Page

After you add a dashboard page to your collection, you can customize and design your page to create a visually appealing and effective dashboard page.

Add Widgets to Dashboard Pages

After you create a collection, you can add dashboard pages to segment your data. You can then add widgets to your dashboards to visualize and receive actionable insights.

Create a Pivot Table from a Widget

Transform a widget into a pivot table to get insights on your data. You can customize the pivot table, apply filters, and even share it with others.

Dashboard Page Filters

You can apply filters to dashboard pages to limit or modify the data in a view. You can filter by a dimension, measurement, or date dimension. Page level filters affect the page and the widgets on the filtered page. You can see if there are any filters applied to your page from the filters tab.

The two types of filters are:

- **Page Filters** – Enable you to filter the page by a dimension, measurement, or date dimension.
- **Interactive FilterSet** – Enable you to save specific views of your dashboard page by saving the selections made to the interactive filter widgets on the page.

Here's a video about dashboard filters app:

🎥 Watch a video

[Create a Dashboard Page Filter](#)

You can apply filters to dashboard pages to limit or modify the data in a view. You can filter by a dimension, measurement, or date dimension. Page level filters affect the page and the widgets on the filtered page.

Create a Dashboard Page Filter

You can apply filters to dashboard pages to limit or modify the data in a view. You can filter by a dimension, measurement, or date dimension. Page level filters affect the page and the widgets on the filtered page.

1. On the dashboard page, to enter edit mode, click the pencil icon.

2. In the Edit Page pane on the left, click **Page Filters**. Here you can see if there are existing page filters.

3. Click **Add Filter**.

   You can add Dimension Filters, Measurement Filters, or both.

   - **Dimension Filters** – Allow you to filter by the dimension values and apply the filter to the page. When applying multiple filters to one dimension, you must set an AND/OR conditional operator to dictate the relationship between the different filters. When filtering by a dimension, the two types of filters are:

     - List filtering – The selected dimensions can be included or excluded in the filter:

       - **List of** – Filter to include
       - **Not List of** – Filter to exclude

       From the dropdown, select the dimension values you want to filter by.

       📝 Note: You can apply only one List Filter per dimension. List Filters can be combined with multiple Conditional Filters.

   - **Measurement Filters** – Allows you to filter by the value of the measurement and apply it to the page. For example, you want to be able to see campaigns that have an Email Open Rate of over 75%. Measurement filters are conditional filters, and can only have an 'AND' relationship with other filters, both in multiple measurement filters and within a single measurement filter.

Available Filters — This table lists the available filtering options:

Type	Operator	Comments
Dimension > String/ Link/ Image/Video	In Not In Equals Not Equals Contains Not Contains Starts with Ends with	When In or Not In is selected, a multi-select control appears for the relevant values within the selected dimension.

Type	Operator	Comments
	Is Empty	
	Not Empty	
	Matches Either	
Dimension > Date	Before	Open a date picker for the input field.
	After	
Measurement > Number/ Percentage/ Currency Dimension > Number Measurement > Duration	>	The input field has a label next to it according to the type of value (%, $ or any other currency sign).
	>=	
	<	
	<=	
	=	
	<>	
	Is NULL	
	Not NULL	
	Is NaN	
	Not NaN	

Interactive FilterSet

Interactive filtersets enable you to save various configured views of your dashboard page by saving the selections made to the interactive filter widgets. You can apply Filtersets as a filter option within the dashboard page.

For example, if your dashboard page displays all campaigns around the world and you want to display the most successful campaigns in the US, you can save an interactive filterset. The filterset loads the widgets in the dashboard page, displaying campaigns only in the US. After you create the filterset, you can select the filterset, and the dashboard data loads automatically with the relevant data.

EDITIONS

Available in: Intelligence Reports Advanced

Create an Interactive Filter

Interactive filtersets enable you to save various configured views of your dashboard page by saving the selections made to the interactive filter widgets. You can apply filtersets as a filter option within the dashboard page.

Apply an Interactive Filterset to a Dashboard Page

After you create an Interactive filterset, any user with access to the dashboard page can apply the interactive filterset to the dashboard page.

Create an Interactive Filter

Interactive filtersets enable you to save various configured views of your dashboard page by saving the selections made to the interactive filter widgets. You can apply filtersets as a filter option within the dashboard page.

1. To enter edit mode, click the pencil icon.

2. Select the values in the interactive filter widgets that you want to save as an interactive filterset.

3. In the Edit page window, click **+ Interactive Filterset**.

4. Name your interactive filterset.

5. To save the selections made to the interactive date widgets and interactive compare widgets in the filterset, check the **Save Date Interactive/Compare Widget dates in filtersets** checkbox. This checkbox enables the date range for the interactive widgets to be applied to the interactive filterset.

> ✏️ **Note:** If you don't select this checkbox, the dates selected within the interactive date widget and interactive compare widgets aren't applied to the filterset. The dashboard page's default date range is displayed instead.

6. Save your filterset.

7. You can find the filtersets you created in the Edit Page window, under **Interactive FilterSets**.

8. To clear applied filtersets, click the option icon in the interactive filterset tab, and then click **Clear Interactive Filters**.

9. To delete a created filterset, select the filterset, and then click the bin icon.

All users can see created filtersets regardless of their user role and permissions. To clear selected interactive filtersets, open the options menu when in edit mode and select **Clear Interactive Filters**.

Apply an Interactive Filterset to a Dashboard Page

After you create an Interactive filterset, any user with access to the dashboard page can apply the interactive filterset to the dashboard page.

1. Click the filter icon at the top of the dashboard page to open the **Page Filters** window.

2. Under the **Interactive FilterSet** tab, select the interactive filterset you want to apply to the dashboard page. All widgets that have interactive filters enabled on the dashboard page are filtered according to the selected interactive filterset.

3. To see the details of the filterset, hover over the information icon next to the filterset name.

> ✏️ **Note:** If a widget is deleted from a filterset, the filterset still functions. To indicate that the deleted widget is no longer being loaded as part of the filterset, it's highlighted with red strikethrough text.

Design Your Page

After you add a dashboard page to your collection, you can customize and design your page to create a visually appealing and effective dashboard page.

The three types of designs are:

- **Designed Themes** – Ready-made, non-branded themes. When selecting a designed theme, the InstaBrand toggles on, allowing you to further customize.

- **InstaBrand** – Branded themes that are automatically generated based on a logo or image that you uploaded.

- **Custom Themes** – A complete custom theme that you design from scratch.

Use Designed Themes

Designed themes provide an array of generic themes that you can apply to your dashboard page to produce stunning visualizations of your data.

Use InstaBrand

InstaBrand is an AI-powered image analysis tool that automatically generates beautiful, branded dashboard page themes. You can upload an image or choose from a catalog of images.

Custom Themes

Custom themes provide you with the flexibility to create any designed theme you want. After you apply an InstaBrand design, you can apply manual changes to your dashboard page from the different customization options available beneath the InstaBrand options.

Use Designed Themes

Designed themes provide an array of generic themes that you can apply to your dashboard page to produce stunning visualizations of your data.

1. In the dashboard page you want to customize, to enter edit mode, click the pencil icon.

2. In the Edit page window, select the **Design** tab.

3. Under **THEME**, click the arrow to open the dropdown list, and then scroll down to **LANDSCAPES**. You can see a list of ready-made themes to use.

4. Select the **Landscape Theme** you want to apply to your dashboard page, for example, Coastline. Your dashboard page automatically updates with the selected theme.

5. Save your dashboard page at the top right of the screen.

EDITIONS

Available in: Intelligence Reports Advanced

USER PERMISSIONS

To create, edit, and apply filters
- Create & Edit

Use InstaBrand

InstaBrand is an AI-powered image analysis tool that automatically generates beautiful, branded dashboard page themes. You can upload an image or choose from a catalog of images.

1. To enter edit mode, click the pencil icon.

2. In the edit page window, select the **Design** tab.

3. Toggle on the **InstaBrand** toggle.

4. In the **Branding Assets** section, these options are available:

   - **Logo** – The logo is used in the dashboard page header along with the dashboard page name. To open the Logo Options tab, click the plus icon from the logo. You can insert a link to the logo or upload a file. Images must be under 50 MB.

   - **Background Image** – The background image is used as the dashboard page's background. After you click the background image, these options are available:

     – **Photos** – In the search box, enter a keyword in the search box and hundreds of images display from the Unsplash library of images.

     – **Link** – Input a link to the logo you want to use as your background image.

     – **Upload File** – Drag and drop a file or browse for the file you want to add as your background image.

5. **Color Palette** – To change the colors, select a color palette. InstaBrand automatically identifies the color palettes that exist in the uploaded logo or image. You can fine-tune its colors as you want.

EDITIONS

Available in: Intelligence Reports and Intelligence Reports Advanced

USER PERMISSIONS
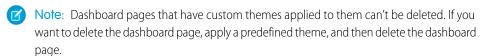
To create, edit, and apply filters
- Create & Edit

6. Fine-tune the InstaBrand display setting you want to apply to your dashboard page. These options are dynamic according to the branding assets you set. The options are:

- **Apply Color Palette to Charts** – Selecting this checkbox applies the selected color palette to all the charts on the dashboard page. If it isn't selected, the chart color settings are based on the default or manual settings previously applied to the widget or measurement list.

- **Override Manual Color Changes** – Selecting this checkbox overrides any manual color settings previously applied to the widget's settings in edit mode. This option is only available if you select the **Apply Color Palette to Charts** option.

- **Show Image as Cover Image** – Select this checkbox to apply the uploaded image as a background image to the dashboard page. If you clear this checkbox, the image is hidden, but you can still use its color palette. This option is available if you uploaded an image.

- **Show Logo on Top** – Select this checkbox to apply the uploaded logo to the header at the top of the dashboard page. If you clear this checkbox, the logo is hidden, but you can still use its color palette. This option is available if you uploaded a logo.

7. Save your new theme after you finish configuring it.

8. Save your dashboard page at the top right of the screen.

Custom Themes

Custom themes provide you with the flexibility to create any designed theme you want. After you apply an InstaBrand design, you can apply manual changes to your dashboard page from the different customization options available beneath the InstaBrand options.

EDITIONS

Available in: Intelligence
Reports Advanced

> **Note:** Dashboard pages that have custom themes applied to them can't be deleted. If you want to delete the dashboard page, apply a predefined theme, and then delete the dashboard page.

- Layout – Customize the layout and design of your widgets along with the margins of the page.

- Background – Customize the dashboard page's background color, background image, and opacity, and apply filters to control brightness and contrast.

- Widgets – Modify your widget's appearance, for example, fine-tune opacity to apply paddings.

- Fonts – Change the text style throughout your dashboard page.

Add Widgets to Dashboard Pages

After you create a collection, you can add dashboard pages to segment your data. You can then add widgets to your dashboards to visualize and receive actionable insights.

EDITIONS

Available in: Intelligence
Reports Advanced

Create a Widget

The widget creation process is streamlined so you can build your widget in just three steps.

Add Data to Your Widget

You can add data to your widget by selecting the measurements and dimensions you want to display. This step is mandatory because you can't save the widget without data.

Apply a Filter to Your Widget

The Filters tab allows you to go over all the filters applied to the widget through the page, for example, date filters or top results.

Create a Widget

The widget creation process is streamlined so you can build your widget in just three steps.

- Data (mandatory)
- Filter (optional)
- Design (optional)

1. On the page you want to add a widget to, to enter edit mode, click the pencil icon.

2. To add a widget, click the **+** icon from the top toolbar.

3. From the **Edit Widget** window on the left, select the type of widget you want to create. All widget types are divided into categories. You can search through the category or use the **Search** option to search for a specific widget.

4. To view the full list of available widget types, click **More Types**.

5. After you select a widget type, add a name. Name your widget so you can use other features later. If you want to use filters, make sure that you use the same names.

6. To show or hide the widget title, click the eye icon next to the widget name.

EDITIONS

Available in: Intelligence
Reports Advanced

USER PERMISSIONS

To create, edit, and apply
filters
- Create & Edit

Add Data to Your Widget

You can add data to your widget by selecting the measurements and dimensions you want to display. This step is mandatory because you can't save the widget without data.

Intelligence Reports has icons for measurements and dimensions to help you easily recognize and select the entities you're looking for.

Measurements	#
Dimensions	(dimensions icon)
Dates	(calendar icon)
Filtered Measurements	(funnel icon)
Calculated measurements and dimensions	Σ

EDITIONS

Available in: Intelligence
Reports Advanced

USER PERMISSIONS

To create, edit, and apply
filters
- Create & Edit

1. In edit mode, select the widget you're adding data to.

2. Make sure that you're in the **Data** tab.

3. If you're adding data to a new widget, click the plus (**+**) icon and add the data.

4. If you're adding data to an existing widget, click the plus (**+**) icon in the Fields section.

> **Note:**
> - By default, Intelligence Reports enables the suggested quick filter and suggests fields based on the fields you have in other widgets on the page. You can use these suggestions or select your own measurements or dimensions. To disable the suggestions, click **Suggestion**.
> - If the max number of allowed measurements or dimensions are already added to the widget, you must remove the existing entity, and only then add the new dimension or measurement.

5. Select the measurements or dimensions you want to display in your widget. Your data is added to the widget automatically, and it updates in real time.

6. To add customized dimensions and measurements, Click **Add Calculated Fields**. You can also create and manage your calculated fields in the Setup tab.

7. Save your widget.

8. Add filters and design your widget.

Apply a Filter to Your Widget

The Filters tab allows you to go over all the filters applied to the widget through the page, for example, date filters or top results.

To modify a filter, click it.

1. From the widget you want to apply a filter to, make sure that you're in edit mode.

2. Select the **Filters** tab.

3. To add a filter, click the plus (**+**) icon. You can add Dimension Filters, Measurement Filters, or both:

   - Dimension Filters – Allow you to filter by the dimension values and apply the filter to the page. When filtering by a dimension, the two types of filters are:
   - List filtering – The selected dimensions can be included or excluded in the filter:

     – List of – Filter to include
     – Not List of – Filter to exclude

   Select the dimension values you want to filter by from the dropdown. You can apply only one List Filter per dimension. List Filters can be combined with multiple Conditional Filters.

   Conditional filtering – Filter using logical conditions applied to Dimension values.

   - Equals
   - Not Equal
   - Contains
   - Not contains

   Select the function you want to filter by, and add the condition. You can apply Multiple Conditional Filters to a Dimension.

4. To edit a filter, click the pencil icon on the filter, and edit as needed.

EDITIONS

Available in: Intelligence Reports Advanced

USER PERMISSIONS

To create, edit, and apply filters
- Create & Edit

Create a Pivot Table from a Widget

Transform a widget into a pivot table to get insights on your data. You can customize the pivot table, apply filters, and even share it with others.

1. In Analytics Builder, select **Intelligence Reports**.

2. On the Dashboards tab, select the widget that you want to convert to a pivot table.

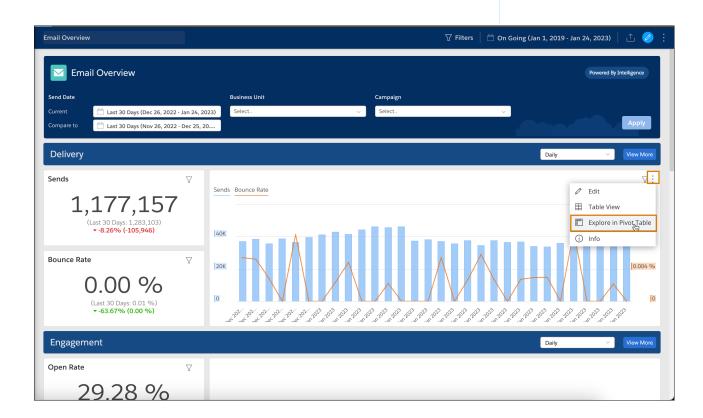3. Click the **Options** icon and select **Explore in Pivot Table**.
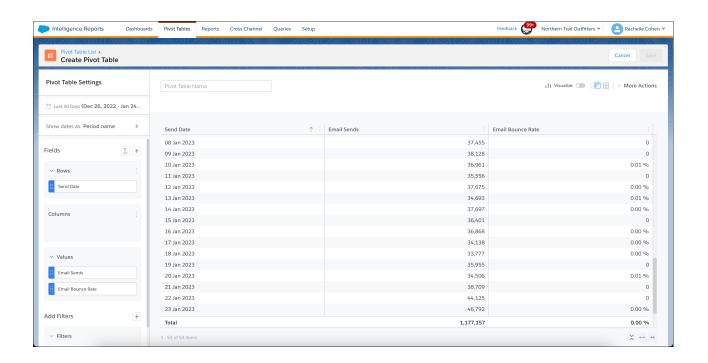
You're redirected to the Pivot Tables tab, and the data now appears in a pivot table.

SEE ALSO:

Apply Filters to Dashboards

Filters enable you to focus on the data most relevant to you. When you select a filter in a dashboard, it applies to all dashboards.

To clear a filter, from the options menu at the top right, select **Clear User Filters Cache**.

To apply filters to the dashboard, select the filters, and click **Apply**.

Note: If you don't see this option, make sure that you have the correct user permission.

These filters are available:

- **Send Date** – The date the email or message was sent. In some dashboards you can filter the send date by:

  - **Current** – The current date includes emails or messages sent within the selected timeframe, even if the emails or messages were opened after the selected timeframe. For example, if you set the time period to the month of October and sent an email on October 25 that wasn't opened until November 2, the email is still included in the current time period.

  - **Compare to** – Identifies the timeframe you want to compare to. The comparison period shows whether the amount increased or decreased, by how much, and the percentage change.

- **Business Unit** – Filters dashboards by business unit. This filter is available only if you have permissions and are logged into the enterprise business account (the parent account).

  Note: You can filter the data by more than one selection.

EDITIONS

Available in: Intelligence Reports and Intelligence Reports Advanced

USER PERMISSIONS

To access dashboards
- Access, View & Export / Schedule / "Create & Edit"

114

- **Campaign** – Filters dashboards by campaign. This filter is available only if you assign a campaign to your emails in Marketing Cloud Engagement.
- **Email Name** – Filters dashboards by a specific email name.
- **Email Subject** – Filters dashboards by a specific email subject
- **Journey Name** – Filters dashboards by a specific journey name. (Only available if you have Journey Builder enabled in your account.)
- **Journey Version** – Filters dashboards by a specific journey version. (Only available if you have Journey Builder enabled in your account.)
- **Journey Activity Name** – Filters dashboards by a specific journey activity name. (Only available if you have Journey Builder enabled in your account.)
- **Mobile App** – Filters dashboards by a specific mobile app. This is the app name that the message was sent to.
- **Mobile OS** – Filters the dashboards by a specific mobile operating system, for example, Android or iOS.
- **Push Send Name** – Filters the dashboards by the name of the push message that was sent.
- **Push Send Title** – Filters the dashboards by the title used in the message content shown to the end user.

Sharing Dashboard Pages and Widgets

Slack provides seamless collaboration with colleagues and clients. Marketing teams can work together and communicate on campaigns and improve cross-functional work. You can share dashboards and widgets via Slack, email, or as downloaded local files. You can also schedule when to share reports.

> **EDITIONS**
>
> Available in: Intelligence Reports and Intelligence Reports Advanced

Sharing Dashboard Pages and Widgets via Intelligence Reports Insights for Slack

Utilize Intelligence Reports insights for Slack to share dashboard pages and widgets.

Share Dashboard Pages and Widgets via Email

You can share widgets and pages via email to collaborate with colleagues and clients.

Download Dashboard Pages and Widgets

You can download dashboard pages and widgets in a variety of formats to your device.

Schedule Reports for Dashboard Pages and Widgets

You can schedule to receive reports of your dashboard page or widget as a PNG or PDF file. Filters aren't applied to scheduled reports.

Sharing Dashboard Pages and Widgets via Intelligence Reports Insights for Slack

Utilize Intelligence Reports insights for Slack to share dashboard pages and widgets.

> **EDITIONS**
>
> Available in: Intelligence Reports and Intelligence Reports Advanced

Integrate Insights for Slack and Intelligence Reports

Integrate with Intelligence Reports Insights for Slack to share dashboard pages and widgets. You can configure the integration on the business unit or collection level. Users with permissions and access to the business unit or collection can then share dashboard pages and widgets in Slack.

Share Dashboard Pages and Widgets via Slack

In order to share your dashboard pages and widgets through Slack you need to set up your Intelligence Reports Insights for Slack Integration in the Setup tab. After you set up the integration you can track and monitor your campaigns and collaborate with Slack. Slack is permission based, only users with permissions and access to the business unit or collection can share dashboard pages and widgets.

Integrate Insights for Slack and Intelligence Reports

Integrate with Intelligence Reports Insights for Slack to share dashboard pages and widgets. You can configure the integration on the business unit or collection level. Users with permissions and access to the business unit or collection can then share dashboard pages and widgets in Slack.

To integrate Intelligence Reports Insights for Slack with Intelligence Reports for Engagement, you install an incoming webhook app. You can use a single webhook and share charts to any public Slack channel. You can also predefine a list of channels and associate a webhook per channel. The advantage of using a webhook per channel is that you can configure both public and private channels.

1. On the **Setup** tab, click **Integrations**.

2. Turn on Slack if it's turned off.

3. Choose whether to integrate the entire business unit or a collection.

4. Enter an integration name that you can easily distinguish.

5. If you're integrating Slack at the collection level, select the collections from the **Target Collection** dropdown.

6. Select the type of webhook to use.

   - **Single Webhook**—Share to any public channel.

   - **Webhook per Channel**—Share to both public and private channels.

7. Add the webhook link. If you don't have the webhook link, click **Get Slack Webhook**, which redirects you to Slack.

8. Save your work.

Share Dashboard Pages and Widgets via Slack

In order to share your dashboard pages and widgets through Slack you need to set up your Intelligence Reports Insights for Slack Integration in the Setup tab. After you set up the integration you can track and monitor your campaigns and collaborate with Slack. Slack is permission based, only users with permissions and access to the business unit or collection can share dashboard pages and widgets.

1. Select the dashboard page or widget that you want to share.

2. Click **Share**, and then click **Slack**.

   Note: You can't share to a private channel or by direct messaging.

Enter the Slack channel (1), and enter a message that describes what you're sharing (2). To send the message with a predefined name, select **Send as** (3). This option appears only when defined in the configuration settings. Preview what you're sending (4).
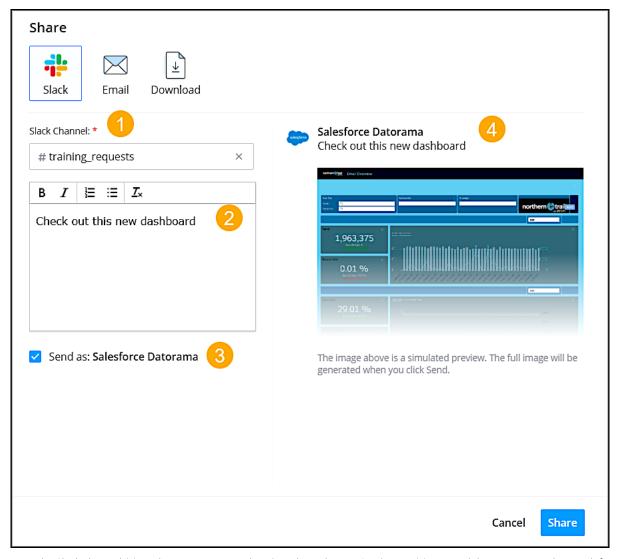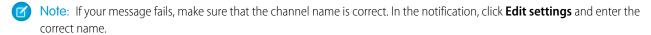
3. Click **Share**.

> **Note:** If your message fails, make sure that the channel name is correct. In the notification, click **Edit settings** and enter the correct name.

Share Dashboard Pages and Widgets via Email

You can share widgets and pages via email to collaborate with colleagues and clients.

1. Select the dashboard page or widget that you want to share.
2. Click **Share**, and then click **Email**.
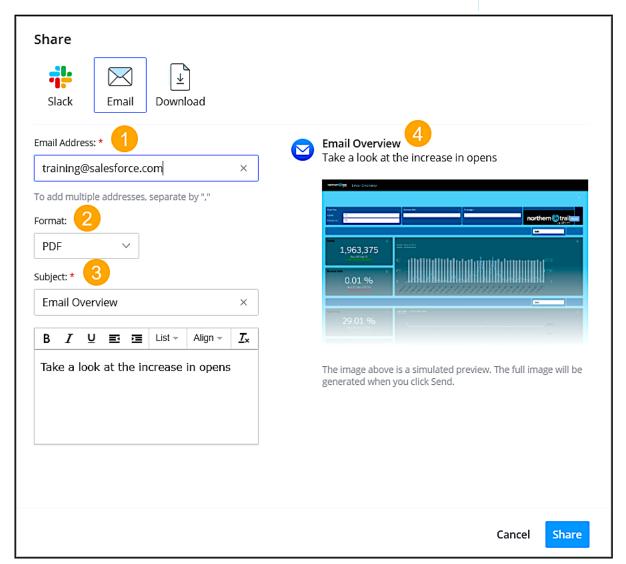
Enter the recipient's email address (1), and select the format (2). Enter the subject (3). The name of the dashboard or page is used by default. Preview what you're sending (4).

3. Click **Send**.

Download Dashboard Pages and Widgets

You can download dashboard pages and widgets in a variety of formats to your device.

1. Go to the dashboard page or widget that you want to download.

2. Click the **Share** icon.

3. Click **Download**.

4. Select the format.

- When exporting to PowerPoint, Intelligence Reports splits long pages into multiple slides according to the slide height and the margin width at the top and bottom.

- When exporting to Excel, Intelligence Reports splits each widget on the dashboard page into individual tabs within the spreadsheet.

5. Click **Download Now**.

Schedule Reports for Dashboard Pages and Widgets

You can schedule to receive reports of your dashboard page or widget as a PNG or PDF file. Filters aren't applied to scheduled reports.

1. Go to the dashboard page or widget that you want to schedule.

2. Click the **Share** icon.

3. Click **Scheduled Reports**. You're redirected to the **Reports** tab, and a report is created based on the format that you selected.

4. To change the format, click the **Export Format** dropdown list. You can export dashboard pages to PNG or PDF. You can export widgets to PNG.

5. Select when to send the report and how.

6. Save your settings, or to run the report now, click **Save & Run**.

SEE ALSO:

Set Report Schedule and Delivery Method

Pivot Tables Overview

Pivot tables allow you to explore your data from multiple perspectives. You can calculate, summarize, and analyze data by seeing comparisons, patterns, and trends in your data. With pivot tables, you can create custom reports without the need for query formulas, such as SQL queries.

For a detailed explanation of the metrics featured in pivot tables, see Dimensions and Measurements.

For more information about pivot tables, click these links:

📝 **Note:** Emails configured to Suppress from Send Reports aren't included in Intelligence Reports.

Out-of-the-Box Pivot Table Examples

By default, Intelligence Reports for Engagement comes with five out-of-the-box pivot table examples. These examples help you get started so you can see how the most common pivot tables are configured and set up. You can use them as is, copy and then adjust them, or even delete them if they're not required.

Create a Pivot Table in Intelligence Reports

Use a pivot table to explore and extract data. For example, you can get sends and open rates for all your emails to see how well a specific email performed. You can also export a pivot table locally or use it to create a scheduled report.

Customize a Pivot Table in Intelligence Reports

You can change the data that is displayed in a pivot table, show or hide columns, and make other customizations.

Export a Pivot Table in Intelligence Reports

You can export a pivot table as a report and run it as part of a workflow in real time or on a defined schedule. You can also export to an Excel file, for example, and share it with others.

Manage Pivot Tables in Intelligence Reports

You can manage pivot tables in Intelligence Reports for Engagement after you create them. You can edit, duplicate, and delete existing pivot tables.

Apply Filters to a Pivot Table

Add filters to a pivot table to narrow down the data and focus on what's relevant to your use case. For example, add a filter to focus on a specific email name instead of all the emails in the campaign. Or filter by a campaign name to focus on that campaign.

Out-of-the-Box Pivot Table Examples

By default, Intelligence Reports for Engagement comes with five out-of-the-box pivot table examples. These examples help you get started so you can see how the most common pivot tables are configured and set up. You can use them as is, copy and then adjust them, or even delete them if they're not required.

These examples are available:

- **Email Daily Send Summary** — Summarizes your email send data so you can see how many emails were sent, delivered, and bounced for a specific time period.

- **Best Performing Send Day** — Shows the send day that has the highest open rate, click to open rate, and email opens.

- **Audience Engagement Over Time** — See how your audience engaged with your emails by looking at email clicks for all your campaigns.

- **Campaign Performance** — See your overall campaign performance for each campaign and email.

- **Journey Performance** - See your overall journey performance by looking at journey name, version and activity.

EDITIONS

Available in: Intelligence Reports and Intelligence Reports Advanced

Create a Pivot Table in Intelligence Reports

Use a pivot table to explore and extract data. For example, you can get sends and open rates for all your emails to see how well a specific email performed. You can also export a pivot table locally or use it to create a scheduled report.

You can also create a pivot table directly from a widget in the Dashboards tab. For more information, see Create a Pivot Table from a Widget.

1. In Analytics Builder, select **Intelligence Reports**.

2. On the Pivot Tables tab, click **Create Pivot Table**.

3. To add data to the pivot table, click **+ Add a Field**.

When adding data, Dimensions are always placed in Rows or Columns, while Measurements are always placed in Values. The pivot table changes as you add or remove data.

4. When you're done adding data, close the Add Data window.

5. In the **Pivot Table Settings** window, set the date range for the data that you want to view.

6. To apply a filter, in the **Filters** section, click the **+** icon and set your filters.

   You can also apply a filter inside the pivot table in the column header.

7. If you have Intelligence Reports Advanced, you can create and edit calculated fields by clicking the **Add Calculated Field** icon. For more information, see Add Data to Your Widget .

EDITIONS

Available in: Intelligence Reports and Intelligence Reports Advanced

USER PERMISSIONS

To create or export pivot tables
- Access, View & Export, Schedule, Create & Edit

To save, edit, and delete pivot tables
- Create & Edit

8. Name the pivot table.

9. To visualize your data in a chart, turn on **Visualize**.

- To show specific dimensions and measurements, or to change the display, click **Chart Settings** (1).
- To change how the results are sorted, click **Chart Top and Sorting** (2).
- To view the pivot table as a flat table, click the flat table icon (3).

10. To save, export, or download your pivot table, click **More Actions**.

11. Save your work.

The new pivot table appears in the Pivot Tables list, and you can edit, delete, and export it.

Customize a Pivot Table in Intelligence Reports

You can change the data that is displayed in a pivot table, show or hide columns, and make other customizations.

1. In Analytics Builder, select **Intelligence Reports**.

2. On the Pivots Tables tab, select the pivot table that you want to change and click **Edit**.

3. To hide a dimension or measurement, in the Pivot Table Settings window, hover over the field name and click the eye icon.

4. To delete a field, click **X**.

5. To add or change data, click the **+** icon.

6. To hide the column or row totals in the pivot table, click **Options** next to **Columns** or **Rows** and deselect the checkbox.

EDITIONS

Available in: Intelligence Reports and Intelligence Reports Advanced

USER PERMISSIONS

To save, edit, and delete pivot tables
- Create & Edit

Export a Pivot Table in Intelligence Reports

You can export a pivot table as a report and run it as part of a workflow in real time or on a defined schedule. You can also export to an Excel file, for example, and share it with others.

1. In Analytics Builder, select **Intelligence Reports**.

2. On the Pivot Tables tab, select the pivot table.

3. Click **More Actions** and then select the export option.

   - **Schedule Export** — If you want to export to a report with a defined schedule, for example create a report every Monday at 8 AM, you have two options. When you select an option, the report format and options change according to the selected format.

     – **Pivot Table (Excel)** — Exports the pivot table to an Excel file as a pivot table object without including the totals.

     – **Flat Table** — Creates a report in an Excel format.

   - **Export** — If you want to export to a flat file, you have two options:

     – **Pivot Table (As Is)** — Exports the pivot table to an Excel file as is.

     – **Flat Table** — Exports the pivot table to an Excel file as a flat table.

SEE ALSO:

    Create a Flat Table Report

    User Roles and Permissions in Intelligence Reports

Manage Pivot Tables in Intelligence Reports

You can manage pivot tables in Intelligence Reports for Engagement after you create them. You can edit, duplicate, and delete existing pivot tables.

The pivot tables list contains the following information:

Column	Description
ID	The ID of the pivot table. This ID is generated automatically.
Name	The name of the pivot table.
Created By	The name of the user who created the pivot table.
Created On	The date and time the pivot table was created.
Last Update By	The user who made the last update.
Last Update On	The date and time the last update was made to the pivot table.

From here, you can perform the following actions:

- **Edit** — If you want to change a pivot table, for example, change the dimensions and measurements.

- **Duplicate** — If you want to create a copy of a pivot table to change it.

- **Delete** — If you want to delete a pivot table.

  📝 Note: When you delete a pivot table, it goes to your workspace bin. If for some reason you want to restore a pivot table, contact support.

SEE ALSO:

Create a Flat Table Report

User Roles and Permissions in Intelligence Reports

Apply Filters to a Pivot Table

Add filters to a pivot table to narrow down the data and focus on what's relevant to your use case. For example, add a filter to focus on a specific email name instead of all the emails in the campaign. Or filter by a campaign name to focus on that campaign.

Let's see how to set up a filter for the following scenario: you want to see data only for campaigns that contains the words 'Welcome' or 'Birthday', and whose bounce rate was greater than 60%.

1. Go to Analytics Builder, select **Intelligence Reports**.

2. On the Pivot Tables tab, select the table that you want to apply a filter to.

3. In the Pivot Table Settings window, under **Add Filters**, click the **+** icon.

4. You can also add a filter directly from the column header.

5. Search for the dimension or measurement that you want to filter by, for example, Campaign.

6. Use the operators to specify how you want to filter. For our example, select **Contains** and enter the value `Welcome`.

7. To add another condition, click **+Condition**. For example, enter `Birthday`.

8. To apply both conditions, use an AND statement. If you want to filter for campaigns that contain either word, use an OR statement.
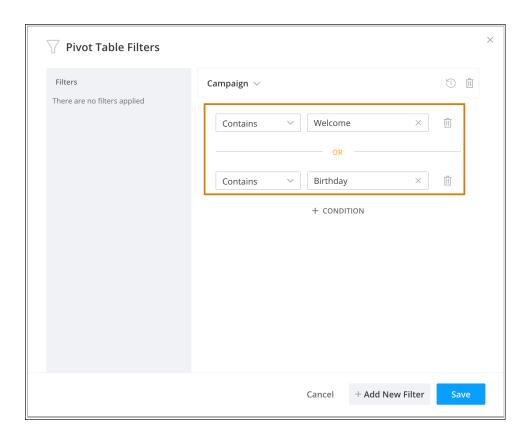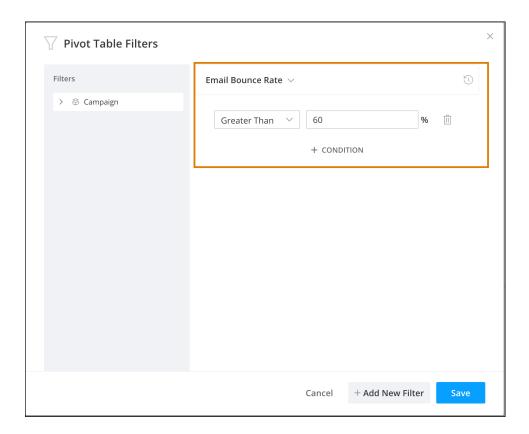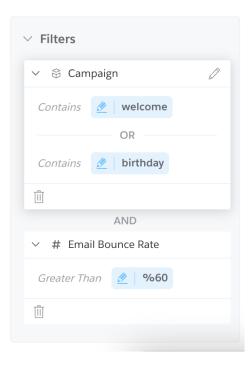
9. To add another filter, click **+Add New Filter**.

For example, select **Email Bounce Rate**, set the operator to **Greater Than**, and enter *60 %*.

10. Save your work.

Here you can see that the filter was set up correctly.

💡 **Tip:** To add a filter to exclude test emails, search for the Test Email Indicator dimension, and set it to False.

Reports Overview

Reports are an easy way to retrieve, view, and share a detailed analysis of your data. You can create the report from scratch by going to the Reports tab and clicking Create New Report. Or you can create the same report by using the Schedule Export option when in a dashboard page or in a pivot table. For example, to create a flat table report, create the report from scratch in Excel, or go to a predefined pivot table and use the Schedule Export Flat Table option.

Emails configured to Suppress from Send Reports aren't included in Intelligence Reports. For a detailed explanation of the metrics featured in each report, see Dimensions and Measurements.

If a report fails after more than 7 consecutive times, the report is disabled. It's advised that you check out why the report failed. Go to the Report's history to see what caused the report to fail. After you fix the report, re-enable it so that it runs again. For more information, see View Report History.

You can also schedule how and when you want the report to run. For example, you can run the report every day at a specific hour. While configuring your report's scheduling, you can define the frequency and delivery time of the report, and the delivery method.

These delivery methods are supported:

- AzureBlob
- Email
- FTPS
- Google Drive
- HDFS
- SFTP
- AWS - S3
- Google Cloud Storage

> **EDITIONS**
>
> Available in: Intelligence Reports and Intelligence Reports Advanced

Create a Report

You can create a report when you want to retrieve, view, and share a detailed analysis of your data. You can create a report from scratch or export an entity like a pivot table or dashboard page to a scheduled report.

Set Report Schedule and Delivery Method

You define scheduling and delivery methods for a report to decide how you want to run and share it. As a result, you decide when the report is sent. For example, if you want the report to go out every day at a specific time, you can set a daily frequency and the time, say, 10:00 PM. You can also define how you want the report to be executed and shared.

Manage Reports

After you create a report, it appears in your reports list. From your reports list, you can view all your reports, edit, delete, and create a copy.

View Report History

You can use the report history to monitor your reports. The report history log displays a list of all the times the report ran. And it provides information about each report execution, such as whether the run was successful and the start and end dates of the execution. You can also download report outputs.

Report Settings

You can set your report settings to allow or prevent users from receiving a download link for large attachments. In Intelligence Reports for Engagement, large files—over 7 MB—are shared via a download link. Any user with the download link can download the report.

Apply Filters to a Report

Add filters to a report to narrow down the data that you see in reports and focus on what's relevant to your use case. You can filter by a standard or custom dimension, such as a campaign, email domain, or country, or by a custom measurement, such as an email bounce rate over 60%.

Create a Report

You can create a report when you want to retrieve, view, and share a detailed analysis of your data. You can create a report from scratch or export an entity like a pivot table or dashboard page to a scheduled report.

Reports in Intelligence Reports can be in these formats:

- Flat Table (Excel/CSV) — Creates a flat file with the data. For example, display the total number of sends per send date.

- Pivot Table (XLS) — Creates an Excel in the same structure as your pivot table view.

- Dashboard (PDF) — Exports a dashboard into a PDF.

For more information about how to create different reports, click these links:

EDITIONS

Available in: Intelligence Reports and Intelligence Reports Advanced

Create a Flat Table Report

You can create a flat table report when you want a report that extracts your raw data into a CSV or Excel file.

Create a Pivot Table Report

To export a report to an Excel file or display the data in a pivot table, you create a pivot table. The pivot table isn't a real Excel object, rather it appears only in the form of a pivot table. You can also create a pivot table report by exporting a pivot table to a scheduled report.

Create a Dashboard Report

You can create a dashboard report in PDF format. You can also create a dashboard report by exporting a dashboard page. When creating the report from scratch, you must link to a dashboard page. The configuration settings come from the dashboard page, so any changes made to the source affect the configuration settings of the report later on.

SEE ALSO:

User Roles and Permissions in Intelligence Reports

Create a Flat Table Report

You can create a flat table report when you want a report that extracts your raw data into a CSV or Excel file.

1. From **Analytics Builder** select **Intelligence [Datorama] Reports**.

2. Select the Reports tab.

3. Click **Create New Report**.

   > 📝 Note: You can also create the same report from the Pivot Table module by using schedule export as a flat table.

4. Define your General details.

   a. Enter a Name.

   b. Select the Export Format: CSV or Excel.

   > 📝 Note: The configuration settings change according to the format type you select. For example, if you select CSV, not all the fields are available.

5. Define your Configuration details:

   a. To determine the dates you want to pull data from, select the Time Period. You can use a predefined time period, such as week, month, or year, or you can define a custom date.

   b. In **Measurements**, select the measurements you want pulled into the report, for example, email sends. You can select up to 100 measurements.

   c. In **Dimensions**, select the dimensions you want pulled into your report, for example, send date. You can select up to 80 dimensions.

   > 📝 Note: For a detailed explanation of the metrics available, see Dimensions and Measurements.

6. Customize your report in the Configuration settings area:

   a. To include the total numbers in the report, select the **Show Totals** checkbox.

   b. From the **Sort By** dropdown, search for and choose the dimension or measurement you want to sort the report by. You can choose from any of the selected dimensions or measurements.

   c. From the **Sort Order** dropdown, select the way you want to sort, either descending or ascending order.

   d. To add another filter to your report, click **Add Filter**. For example, you can also filter by Campaign Name. For more information about filters, refer to Apply Filters.

7. Define scheduling and delivery methods for the report. Refer to Define Scheduling and Delivery Methods.

SEE ALSO:

User Roles and Permissions in Intelligence Reports

Create a Pivot Table Report

To export a report to an Excel file or display the data in a pivot table, you create a pivot table. The pivot table isn't a real Excel object, rather it appears only in the form of a pivot table. You can also create a pivot table report by exporting a pivot table to a scheduled report.

When creating the report from scratch, you must link to an existing pivot table. The configuration settings come from the pivot table, so any changes made to the source affect the configuration settings of the report later on.

> **Note:** Most of the report configuration settings are self-explanatory or have a tooltip available in the platform.

1. Access the Intelligence Reports for Engagement, select the Reports tab.

2. Select the **Reports** tab.

3. Click **Create New Report**.

> **Note:** When creating the report from scratch, you must link to an existing pivot table. The configuration settings come from the pivot table, so any changes made to the source affect the configuration settings of the report later on.

4. For General details, name the report and select **Export Format: Pivot Table**.

5. To define your report configuration details, select the time period from which to pull data.

6. Specify when and how to deliver the report.

SEE ALSO:

User Roles and Permissions in Intelligence Reports

Set Report Schedule and Delivery Method

Create a Dashboard Report

You can create a dashboard report in PDF format. You can also create a dashboard report by exporting a dashboard page. When creating the report from scratch, you must link to a dashboard page. The configuration settings come from the dashboard page, so any changes made to the source affect the configuration settings of the report later on.
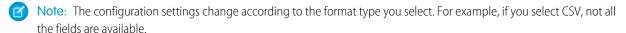
1. From **Analytics Builder**, select **Intelligence [Datorama] Reports**.

2. Select the Reports tab.

3. Click **Create New Report**.

4. Define your General details.

   a. Enter a Name.

   b. Select the Export Format: **PDF**.

   c. To determine how long reports are kept before they're deleted, enter the Purge Report History (Days). For example, if you enter 30, all reports are deleted after 30 days.

   > **Note:** By default, the number of days is set to 180, which is also the maximum number of days you can keep reports.

5. Define your Configuration details, and select the dashboard page for which you're creating the report.

6. Define scheduling and delivery methods for the report. Refer to Define Scheduling and Delivery Methods.

SEE ALSO:

User Roles and Permissions in Intelligence Reports

Set Report Schedule and Delivery Method

You define scheduling and delivery methods for a report to decide how you want to run and share it. As a result, you decide when the report is sent. For example, if you want the report to go out every day at a specific time, you can set a daily frequency and the time, say, 10:00 PM. You can also define how you want the report to be executed and shared.

The following delivery methods are supported:

- AzureBlob
- Email
- FTPS
- Google Drive
- HDFS
- SFTP
- AWS - S3
- Google Cloud Storage

EDITIONS
Available in: Intelligence Reports and Intelligence Reports Advanced

USER PERMISSIONS
To create and edit reports - Schedule

When a report is executed according to a scheduled time, it's known as a scheduler. You can set up multiple schedulers per report, depending on your needs. For example, you can send a report to the management team on a weekly basis and the same report to the analyst team daily. You can also share the report via Email and FTPS simply by adding FTPS as a delivery method and updating the scheduler.

1. When defining a report, go to the **Report Scheduling** area.

2. Select the **Active** checkbox. After you select this checkbox, all options are enabled.

3. Select how frequently you want the report to be sent from the **Frequency** dropdown. More settings are added based on the frequency you select. For example, if you select daily, you can set how many times a day the report is sent. If you select weekly, you can also set the day of the week and time.

4. In **Delivery Hour**, enter the exact hour you want the report to be sent.

> **Note:** If you want to use an automatic hour instead of defining your own hour, select Automatic. By default, automatic is defined as 6:00 UTC.

5. In the **Delivery Method** dropdown in the Connection Info area, select how you want the report to be exported and shared. For example, select **Email**.

> **Note:** More settings are available depending on the delivery method you select. For example, if you select Email, you can enter the recipients' email addresses. If you select FTPS, you can enter the FTPS details.

6. To apply this scheduler to your report, click **Add As New Scheduler**.

> **Note:** If you don't complete this step, then your report can't run on a schedule.

7. To create a scheduler using the same configuration, for example, if you also want to share the report via FTPS, change the delivery method to FTPS. Then fill in any necessary settings, and click **Add As New Scheduler**. After you complete this step, a new row is added to the table.

8. To change a scheduler and override the settings, select the row of the scheduler, and make your changes, for example, change the delivery hour. Then click **Update Scheduler**.

9. After you define your report and schedulers, click **Save and Run**, or to save the settings and not run the report, click **Save**.

SEE ALSO:

User Roles and Permissions in Intelligence Reports

Manage Reports

After you create a report, it appears in your reports list. From your reports list, you can view all your reports, edit, delete, and create a copy.

If you want to make changes to a report, click **Edit**. For example, change the delivery hour.

If you want to create a copy of a report and make changes to it, click **Duplicate**. You can duplicate the reports with or without the schedulers.

If a report is no longer needed, click **Delete**. When you delete a report, it goes to your workspace bin. If you want to restore a deleted report, contact support.

To run the report immediately, click **Run Now**.

To process the reports and split the data into files by date, click **Batch Process**. Batch processing doesn't affect the original report configuration.

> **Note:** If a report fails after more than 7 consecutive times, the report is disabled. It's advised that you check out why the report failed. Go to the Report's history to see what caused the report to fail. After you fix the report, re-enable it so that it runs again. For more information, see View Report History.

The reports list contains the following information:

Column	Description
ID	The ID of the report. This ID is generated automatically.
Name	The name of the report.
Format	The report's export format, which is given during the report's creation.
Scheduling Status	Indicates if the report's scheduling is enabled or disabled. If the report is disabled, it's currently not running.
Next Report Date	Displays the date of the next report to run.
Created By	The name of the user who created the report.
Created On	The date and time the report was created.
Last Update By	The user who made the last update.

<div style="border:1px solid #ccc; padding:8px;">

EDITIONS

Available in: Intelligence Reports and Intelligence Reports Advanced

</div>

Column	Description
Last Update On	The date and time the last update was made to the report.

User Roles and Permissions in Intelligence Reports

View Report History

You can use the report history to monitor your reports. The report history log displays a list of all the times the report ran. And it provides information about each report execution, such as whether the run was successful and the start and end dates of the execution. You can also download report outputs.

1. Select the **Reports** tab.

2. Select a report, and then click **History**. A list appears with all the report executions. Each time a report runs, a new job is executed and a new row appears in the list.

3. If you want to perform actions on a specific log, select the row of the log.

4. Perform one of the following:

   - **Edit** — To edit the report's configuration settings.

   - **Delete** — To delete a log from the list.

   - **Refresh** — To refresh the history log, which can be useful if you ran a report and the status changed.

   - **Download** — To download the report output.

   - **Run Now** — To run the same report again.

   - **Rerun Now** — To run the same job again.

To get more information on report execution, use the following link:

Review Report Execution Information in Intelligence Reports

When a report runs in Intelligence Reports for Engagement, you can see a list of all the report executions. Each time a report runs, a new job is executed and a new row appears in the list.

EDITIONS

Available in: Intelligence Reports and Intelligence Reports Advanced

USER PERMISSIONS

To create and edit reports
- Schedule / "Create & Edit"

Review Report Execution Information in Intelligence Reports

When a report runs in Intelligence Reports for Engagement, you can see a list of all the report executions. Each time a report runs, a new job is executed and a new row appears in the list.

You can see the following information:

EDITIONS

Available in: Intelligence Reports and Intelligence Reports Advanced

Column	Description
Job ID	A system-generated ID.
Start Date	The starting date the data was queried. This date is defined when configuring the report.
End Date	The ending date the data was queried. This date is defined when configuring the report.

Column	Description
Source	The location where the job was triggered from, for example, manual.
Format	The export format of the report, either PDF or Excel. The format is defined when configuring the report.
Method	The delivery method, such as Email or FTP. The method is defined when configuring the report.
Reason	If the job fails, the report history includes a reason, for example, query validation.
Execution Start Date	The start time the job was executed.
Execution End Date	The end time the job was executed.
User	The name of the user who created the report.

Report Settings

You can set your report settings to allow or prevent users from receiving a download link for large attachments. In Intelligence Reports for Engagement, large files—over 7 MB—are shared via a download link. Any user with the download link can download the report.

To control your report settings for large files:

1. From the Analytics Builder, select **Intelligence [Datorama] Reports**.

2. Select the **Setup** tab and click **Report Settings**.

3. By default, the **Allow Download of Large Attachments** toggle is enabled. To prevent a download link of your report from being sent, disable the toggle.

EDITIONS

Available in: Intelligence Reports and Intelligence Reports Advanced

Apply Filters to a Report

Add filters to a report to narrow down the data that you see in reports and focus on what's relevant to your use case. You can filter by a standard or custom dimension, such as a campaign, email domain, or country, or by a custom measurement, such as an email bounce rate over 60%.

There are three different types of filters:

- **Dimensions** — Filters by a dimension. For example, campaign, email domain, or country.

- **Custom dimensions** — Filters by a customized dimension. For example, filter by an email name that contains the characters "NTO."

- **Custom measurements** — Filters by a customized measurement. For example, filter by email bounce rate that is over 60%.

1. In Analytics Builder, select **Intelligence Reports**.

2. On the Reports tab, select a report.

3. Under Configuration, click **Add Filter**.

4. To add a dimension, for example, if you want to filter by the campaign name "Birthday":

    a. Select **Custom Dimensions**.

    b. Search for the required dimension, and enter **Campaign**.

    c. Select the value. In this case, **Birthday**.

    d. To apply the filter, save your work.

EDITIONS

Available in: Intelligence Reports and Intelligence Reports Advanced
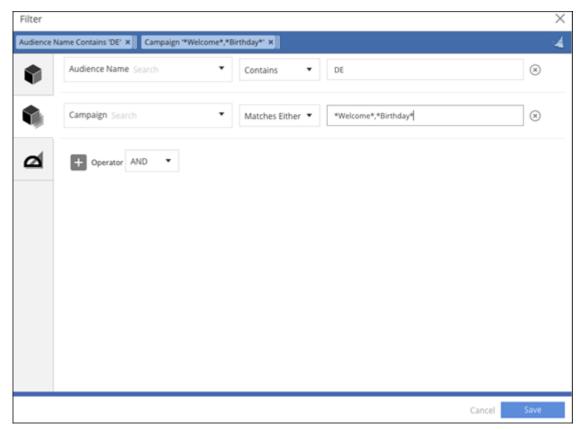
USER PERMISSIONS

To apply filters to reports:
- Create & Edit

5. To add a custom dimension, for example, if you want to filter by an email name that contains the characters "NTO":

    a. Select **Custom Dimensions**.

    b. Select the dimension from the dropdown list, and select **Email Content Name**.

    c. Select the operator from the dropdown list, and select **Contains**.

    d. Enter the value in the field. In this case, enter "NTO."

    e. To apply the filter, save your work.

6. You can add multiple operators when filtering to retrieve dimensions that contain specific information according to defined rules. For example, get all the campaigns that contain the names, '"welcome" or "birthday" and that come from audiences that contain the letters DE.

    a. Define the first rule. For example, Audience Name contains DE.

        • Select the dimension from the dropdown list, and select **Audience Name**.

        • Select the operator from the dropdown list, and select **Contains**.

        • Enter the value in the field, in this case, enter *DE*.

    b. Define the match either rule. For example, Campaign matches either 'Welcome' or 'Birthday'

        • Select the dimension from dropdown list, and select **Campaign**.

        • Select the operator from the dropdown list, and select **Matches Either**.

        • Enter the value in the field. In this case, use an asterisk (*) at the beginning and at the end of the value with a comma separating the values. For example, **Welcome*, *Birthday**.

    c. To apply the filter, save your work.

7. To add a custom measurement, for example, if you want to filter by email bounce rate that equals 80%:

   a. Select **Custom Measurements**.

   b. Select the measurement from the dropdown list, and select **Email Bounce Rate**.

   c. Select the operator from the dropdown list, and select **Greater Than**.

   d. Enter the value in the field. In this case, enter 80%.

   e. To apply the filter, save your work.

> 💡 Tip: To add a filter to exclude test emails, search for the Test Email Indicator dimension, and then set it to False. After you do, test emails don't appear in your pivot tables or reports.

Cross-Channel Apps

Cross-Channel apps allow you to take your data from separate silos, and then connect, visualize, and analyze your key data sources. The apps are available in the Cross-Channel tab, where you can demo and install various apps.

EDITIONS
Available in: Intelligence Reports Advanced

> 📝 Note: Every cross-channel app can only be installed once, providing a single account per external data provider. With the full Intelligence Reports for Engagement license, you have access to a vast number of apps, unlimited app installations and you can connect as many external data providers as needed.

Available Cross-Channel Apps

Intelligence Reports Advanced offers four ready-to-use cross-channel apps.

Manage Cross-Channel App Credentials

Use the app credentials manager to view data sources that you added to your cross-channel apps and the credentials for each data source. When connecting third-party platforms to your apps, you can add new account credentials, refresh, or update existing credentials. If a data error occurs with your app, you can access and edit the credentials or log a support ticket.

Available Cross-Channel Apps

Intelligence Reports Advanced offers four ready-to-use cross-channel apps.

The installation for each app is dynamic and requires unique steps. After you install an app, you can go to the Dashboards tab, where you can view and access your installed apps in the Cross-Channel Analysis section.

EDITIONS
Available in: Intelligence Reports Advanced

> 📝 Note: All dashboards that are created with cross-channel apps are read-only and can't be modified.

Email to Web Conversion GA4 App

The Email to Web Conversion GA4 app combines your Marketing Cloud Engagement and Google Analytics data into one view so that you can easily see how well your email campaigns are performing.

Audience Insights for Advertising Studio App

Connect Marketing Cloud Advertising, formerly known as Advertising Studio to your paid media channels to optimize your audience strategy with a single, cross-channel view, and analyze the effectiveness of your first-party audiences. Explore how your audiences are performing across channels with a ready-made dashboard.

Cross-Channel Marketing Insights

The Cross-Channel Marketing Insights app unifies your data to help you make data-driven decisions. Users with a full Intelligence Reports license can edit and customize the app.

Marketing Insights for Sales Cloud

The Marketing Insights for Sales Cloud solution helps marketing and sales understand how marketing efforts and spend are converting into revenue. For example, discover weak links in your sales funnel or find business justifications to ramp up or pause a campaign.

Email to Web Conversion GA4 App

The Email to Web Conversion GA4 app combines your Marketing Cloud Engagement and Google Analytics data into one view so that you can easily see how well your email campaigns are performing.

Installing the app involves these high-level steps:

- Connect Google Analytics data.
- Match campaign names.
- Classify Google Analytics campaign names.
- Classify email campaign names.

EDITIONS

Available in: Intelligence Reports Advanced

Classify Campaign Names

To harmonize your data, the Email to Web Conversion GA4 app relies on matching your Google Analytics and Marketing Cloud Engagement campaign names. Therefore, if you use different naming conventions for Google Analytics and Salesforce, you must classify your campaign names so that the app can locate the data from each source.

Install the Email to Web Conversion GA4 App

Installing the Email to Web Conversion GA4 app requires a Google Analytics account for the web analytics data. You must have UTM campaigns defined for your emails.

View Email Campaign Performance

Use the Email Campaign Performance dashboard to monitor your campaigns. The dashboard that's created with this app is read-only and can't be modified.

GA4 Fields Available in the Email to Web Conversion App

The Email to Web Conversion GA4 app was rebuilt to work with GA4, and therefore some fields were changed accordingly. This list displays the old fields that were used in the previous version of the app (Email to Web Conversion Deprecated), and the new fields that the new app (Email to Web Conversion GA4) uses. These fields appear in the run mode of the app.

Classify Campaign Names

To harmonize your data, the Email to Web Conversion GA4 app relies on matching your Google Analytics and Marketing Cloud Engagement campaign names. Therefore, if you use different naming conventions for Google Analytics and Salesforce, you must classify your campaign names so that the app can locate the data from each source.

EDITIONS

Available in: Intelligence Reports Advanced

Many times a campaign name contains irrelevant information. For example, if your campaign name is Summer_2020_Shoes_Sale and you want it to say Summer Sale, create a rule that removes the unneeded information and leaves only the name as the final campaign name.

You have two ways to create a final campaign name:

- **Use Contains**—Creates a rule that tells the app the final campaign name. For example, if the name contains the letters "ABC," the final campaign name is "ABC Campaign."
- **Use a Pattern**—Extracts a specific term according to a position and delimiter in the naming convention. You can then use the extracted term to classify the campaigns. For example, if your naming convention is "summer_sale_1," you extract the first position, which is "summer." You can use the term "summer" as the contains term and classify the campaigns according to the term.

Install the Email to Web Conversion GA4 App

Installing the Email to Web Conversion GA4 app requires a Google Analytics account for the web analytics data. You must have UTM campaigns defined for your emails.

> **Important:** If you need to connect to GA4 data you must install the new version of this app: Email to Web Conversion GA4 app. The previous version of this app (Email to Web Conversion Deprecated) doesn't use GA4 data and the data won't be updated.

> **Note:** This app supports one conversion rate and one funnel. Multiple funnels aren't supported.

1. On the **Cross-Channel Apps** tab, select **Email to Web Conversion GA4**.

2. Click **Get it Now**, and then click **Get Started**.

3. Select your Google Analytics account, select websites to pull data from, and then click **Next**.

4. To match campaign names, select the dimension that represents your campaign names. Message Send Name is selected by default.

   You can change the date range to look for data from specific time periods.

5. (Optional) Classify your Google Analytics and Marketing Cloud Engagement campaign names. To explicitly define the final campaign name, click **Use Contains**. To create final campaign names by matching terms, click **Use a Pattern**. You can classify campaign names manually or in bulk by with a CSV file.

   If you're using a pattern, positions related to the order of the terms in the campaign name. For example, Position 1 is the first term in your campaign name.

6. When you're done, finish the installation.

View Email Campaign Performance

Use the Email Campaign Performance dashboard to monitor your campaigns. The dashboard that's created with this app is read-only and can't be modified.

> **Note:** If you installed the previous version of this app (Email to Web Conversion Deprecated), you will only see UA360 data and it will only be updated to the latest processed data. In order to connect to your GA4 instance you must install the new version of this app (Email to Web Conversion GA4). For more information, see Install the Email to Web Conversion GA4 App

You can filter the dashboard by:

- Date—Filter by a specific time period.
- Campaign—Filter by a specific campaign.

The dashboard contains these sections.

Section	Widget	Description
Email Web Performance provides an overview of all your email web performance.		

Section	Widget	Description
	Emails Sent	The total number of emails sent during the defined time period
	Email Open Rate	The total number of emails opened during the defined time period
	Email Click Rate	The total number of emails clicked during the defined time period
	Daily Visitors	The total number of daily website visitors during the defined time period
	Page Views	The total number of pages viewed on the website during the defined time period
	Visitor Bounce Rate	The total visitor bounce rate for the defined time period
	Email + Web Performance	A detailed view of all emails and their performance

Funnel Analysis shows an overview of your website data. You can filter by: Campaign Name and Email Subject.

Section	Widget	Description
	Conversion Funnel	The number of emails sent and the percentage opened and clicked, and the total number of website visits
	Campaign Performance	A graph showing campaign performance based on message open rate versus message sends
	Email Detail	A detailed view of all your emails
	Email Flow Optimization	An overview of email flows that you can filter by a flow type or optimization metric
	Email Flows	A graph showing your email data based on the metric you selected (for example, emails opened)
	Email Data Table	A detailed view of the total number of emails opened per campaign

GA4 Fields Available in the Email to Web Conversion App

The Email to Web Conversion GA4 app was rebuilt to work with GA4, and therefore some fields were changed accordingly. This list displays the old fields that were used in the previous version of the app (Email to Web Conversion Deprecated), and the new fields that the new app (Email to Web Conversion GA4) uses. These fields appear in the run mode of the app.

If you installed the previous version of this app (Email to Web Conversion Deprecated), you will see the UA fields, not the GA4 fields.

EDITIONS

Available in: Intelligence Reports Advanced

Note: This list is only relevant to the Email to Web Conversion GA4 app, GA4 is not suggesting an interchangeable solution between UA data and GA4. For more information about GA4, see GA4 Google Documentation.

UA Fields	GA4 Fields
Daily Visitors	visitors (total_users)
Page View	screenPageViews
Website transactions	transactions

Note: The Visitor Bounce Rate has a new calculation to align with GA4. For more information, see GA4 Metrics.

Audience Insights for Advertising Studio App

Connect Marketing Cloud Advertising, formerly known as Advertising Studio to your paid media channels to optimize your audience strategy with a single, cross-channel view, and analyze the effectiveness of your first-party audiences. Explore how your audiences are performing across channels with a ready-made dashboard.

Note: Advertising Studio is now Marketing Cloud Advertising. We are still working on updating the platform so all instances will still be referred to as Advertising Studio until this is done.

Installing the app involves these high-level steps.

- Connect Marketing Cloud Advertising data.
- Connect advertising platform data.
- Classify campaign strategies.
- Review data model mapping.

EDITIONS

Available in: Intelligence Reports Advanced

Install the Audience Insights for Advertising Studio App

Measure how your activated audiences are affecting your leading KPIs, prove the impact of first-party audiences in your campaigns, and track when and where your first-party audiences are being used.

View Audience Insights for Advertising Studio Data

Use the Audience Insights for Advertising Studio dashboard to optimize campaigns using first-party audiences.

Install the Audience Insights for Advertising Studio App

Measure how your activated audiences are affecting your leading KPIs, prove the impact of first-party audiences in your campaigns, and track when and where your first-party audiences are being used.

Note: Advertising Studio is now Marketing Cloud Advertising. We are still working on updating the platform so all instances will still be referred to as Advertising Studio until this is done.

Also, you must have Marketing Cloud Advertising Admin permissions to install this app.

1. On the **Cross-Channel Apps** tab, select **Audience Insights for Advertising Studio**.

2. Click **Get it Now**.

3. Connect your Marketing Cloud Advertising data.

EDITIONS

Available in: Intelligence Reports Advanced

USER PERMISSIONS

To install Cross-Channel apps
- "Create & Edit"

You can use your Marketing Cloud Engagement or Marketing Cloud Advertising credentials to connect.

   a. If your Marketing Cloud Advertising user is already authenticated, select the username from the dropdown. Or, if you must authenticate, click **Add New Authentication**. After you connect, all business units that exist for your user appear in the dropdown.

   b. Select the business unit you want to connect to.

   c. Click **Next**.

4. Connect your advertising platform data.

By default, all Facebook Ads, Twitter Ads, and Google Ads data streams in your workspace are selected automatically. A data stream is created when you connect data.

   a. If you want to remove or add an existing data stream, deselect or select the checkbox next to the data stream.

   b. To add a new data stream, click **Add New**.

   c. Click **Next**.

5. Classify your campaign strategies.

All future campaigns are classified if named according to the naming convention used during the classification process. The app identifies a few strategies used in Marketing Cloud Advertising, for example, awareness or conversion. You can add or remove strategies and add classification rules to the strategies created.

   a. The left side lists all your campaigns in Marketing Cloud Advertising according to the date range chosen. You can also view unclassified campaigns.

   b. To classify a campaign by a strategy, go to the strategy, and add a contains with the name of your campaign.

    The right side lists the strategies. Each strategy has predefined rules that classify your campaigns. You can change the rules to accommodate your naming conventions.

   c. To classify your campaigns according to your own naming conventions, you can upload a classification file by clicking **Upload File**.

    You can't see the campaign data for new data streams. However, they're classified according to the rules you upload.

6. Review your mapping.

Intelligence Reports automatically maps your external audience data from the advertising platforms to the Intelligence Reports data model. You can edit the mapping if necessary.

7. Complete the installation by clicking **Install**.

View Audience Insights for Advertising Studio Data

Use the Audience Insights for Advertising Studio dashboard to optimize campaigns using first-party audiences.

> 📝 **Note:** Advertising Studio is now Marketing Cloud Advertising. We are still working on updating the platform so all instances will still be referred to as Advertising Studio until this is done.

Additional Information

- The dashboard that's created with this app is read-only and can't be modified.
- The Google Ads API doesn't pull excluded audience data.

You can filter the dashboard by:

- **Platform**—Filter by a specific advertising platform.
- **Date**—Filter by a specific time period.

EDITIONS

Available in: Intelligence Reports Advanced

USER PERMISSIONS

To consume Cross-Channel apps
- Access, View & Export, Schedule, "Create & Edit"

The dashboard contains these sections:

Section	Widget	Description
Overall View for Campaigns Using First-Party Audiences provides a snapshot of how your campaigns are performing in relation to impressions, conversions, and spend. This section contains these widgets:		
	Total Spend	The total amount of money spent in all campaigns using first-party audiences.
	Total Impressions	The total number of impressions for all campaigns using first-party audiences.
	Total Conversions	The total number of conversions for all campaigns using first-party audiences.
	Total # of Audiences	The total number of audience lists that are either active or have errors in Marketing Cloud Advertising. Audiences in draft don't appear in the total calculation.
	Total # of Audiences Active in Campaigns	The total number of audiences active in campaigns displayed in the current timeframe. These audiences are either included or excluded from these campaigns.
Audience Usage shows which audiences were used the most and which weren't used at all in your campaigns. This section contains these widgets:		
	Top Used Audiences	The audiences most used in your campaigns, either as included or excluded.
	Least Used Audiences	The audiences least used in your campaigns, either as included or excluded.
Top Campaigns lists the top-performing campaigns. You can select the relevant audience and then filter by a measurement to investigate the performance of the top-10 campaigns. This section contains this widget:		
	Top 10 Campaigns for Selected Audience	Your top-10 campaigns in a bar chart. You can filter by audiences included or excluded in the campaigns and organize the campaigns according to different measurements: impressions, clicks, CPM, media cost, conversion CPA, and conversion rate.
		The Google Ads API doesn't pull excluded audience data; therefore no data is found for excluded audiences in Google Ads.

Which Strategy of Audience Performs Best

Displays which strategies perform best according to the campaign performance. Use the relevant measurements to see how each strategy performs. You can filter by strategy and audiences used in the different campaigns to see how they react to different strategies.

Detailed Display All - Campaign for Each Audience

Section	Widget	Description
		Displays all your campaigns and audiences and provides a detailed view.

Cross-Channel Marketing Insights

The Cross-Channel Marketing Insights app unifies your data to help you make data-driven decisions. Users with a full Intelligence Reports license can edit and customize the app.

> **Note:** The Cross-Channel Marketing Insights app now supports GA4 and can be selected alongside UA360 profiles during the installation. In order to pull in GA4 data you must first uninstall and then reinstall the app.

With the Cross-Channel Marketing Insights app you can:

- Drill down and compare your campaigns and creatives cross-channel.
- Use Einstein Marketing Insights to get items that you can act on right away.
- Learn about your top and worst performers and their characteristics.
- Start and stop campaigns right from the app.

When you install the app, your Marketing Cloud Engagement data is automatically connected and ready to use. If you don't need the data, you can remove it. Installing the Cross-Channel Marketing Insights app requires a Google Analytics account and credentials for each marketing platform that you want to add.

Use the Cross-Channel Marketing Insights dashboard to view cross-channel, data-driven insights.

EDITIONS

Available in: Intelligence Reports Advanced

Install the Cross-Channel Marketing Insights App

When you install the app, your Marketing Cloud Engagement data is automatically connected and ready to use. If you don't need the data, you can remove it. Installing the Cross-Channel Marketing Insights app requires a Google Analytics account and credentials for each marketing platform that you want to add.

> **Note:** The Cross-Channel Marketing Insights app now supports GA4 and can be selected alongside UA360 profiles during the installation. If you already installed the app and require GA4 profiles, you must first uninstall and then reinstall the app.

1. On the **Cross-Channel Apps** tab, select **Cross-Channel Marketing Insights**.

2. Click **Get it now**.

3. Connect your marketing channels.

4. Select an existing stream or create one.

5. Add other marketing channels.

6. After your data is connected, click **Let's start**.
   After the app is finished installing, you can access the app views in the **Dashboards** tab.

EDITIONS

Available in: Intelligence Reports Advanced

USER PERMISSIONS

To install Cross-Channel apps
- "Create & Edit"

View Cross-Channel Marketing Insights

Use the Cross-Channel Marketing Insights dashboard to view cross-channel, data-driven insights.

> **Note:** The Cross-Channel Marketing Insights app now supports GA4 and can be selected alongside UA360 profiles during the installation. In order to pull in GA4 data you must first uninstall and then reinstall the app. For more information, see Install the Cross-Channel Marketing Insights App.

The dashboard contains these tabs:

> **Note:** The dashboard that's created with this app is read-only and can't be modified.

Tab	Description
Research	Dive into your marketing performance with all your connected platforms, and view your most important metrics. Toggle between these views to expand your analysis: • **Data View**—Compare your data metrics for each platform, such as impressions and clicks. • **See Totals**—View totals for all platforms, split per metric, within the selected timeframe. • **Graphic View**—Compare how each platform is performing over time for the selected metric.
Insights	Lists the highest and lowest performing campaigns by cost compared to all cross-channel campaigns. View characteristics that can help you define changes to improve the metrics.
Einstein Marketing Insights (EMI)	Get ways to improve your marketing efforts, such as pausing certain campaigns or allocating more budget to other campaigns.

Marketing Insights for Sales Cloud

The Marketing Insights for Sales Cloud solution helps marketing and sales understand how marketing efforts and spend are converting into revenue. For example, discover weak links in your sales funnel or find business justifications to ramp up or pause a campaign.

The Marketing Insights for Sales Cloud solution uses the Leads, Opportunities, Accounts, Contact, Campaigns, and Campaign Members objects.

Install the Marketing Insights for Sales Cloud Solution

Get insights on the complete sales cycle, from spend to revenue, through return on investment. Using the Marketing Insights for Sales Cloud solution requires the Cross-Channel Marketing Insights solution with at least one paid ad campaign on a common advertising platform.

USER PERMISSIONS

To install Cross-Channel solutions
- "Create & Edit"

1. On the **Cross-Channel Solutions** tab, select **Marketing Insights for Sales Cloud**.

2. Click **Get it now**.

   A wizard navigates you through the configuration process.

3. Click **Start**.

4. Connect to your Salesforce CRM data.

   - If you've already authenticated your CRM data, select the authentication you want to connect to from the dropdown.

   - If you haven't authenticated your CRM data, click **Add new authentication** and then select the authentication from the dropdown.

5. Select the time period you want to retrieve CRM data for, and click **Apply**.

   The tables to be extracted from your CRM instance appear on the right. To see the data points, hover over a table with your mouse.

6. Click **Next**.

7. Preview the fields used to harmonize your CRM data and the CRM objects used, and then click **Next**.

8. Classify your CRM data.

   a. Drag each displayed status to the appropriate data stream type according to how you classify each status, either **Lead** or **Qualified Lead**.

   b. When you see the "Statuses successfully classified!" notification, click **Next**.

   c. Drag each displayed stage to the appropriate bucket based on how you classify each stage, either **Opportunities** or **Closed Won**.

   d. When you see the "CRM Data successfully connected, harmonized, and classified!" notification, click **Next**.

9. Connect your ads data.

   a. Select the data stream that you want to connect, and click **Next**.

   b. Under **Usage**, select the fields for each provider.

      The harmonization takes place between the **Name** field in the CRM's campaign object and the **Campaign Name** field in Ads, so they must be identical. If they're not identical, you must create a pattern or classification.

      - **Identical**—Select if the names of the fields that connect your CRM and campaign data are identical. For example, if the name is both My Product Summer_Sale in Ads and the CRM.

      - **Pattern**—Select if the name of the fields that connect your CRM and campaign data contain the same naming conventions, but aren't identical. Enter the delimiter, select the position, and select which Ads data you want to apply it to. For example,

if the name is Summer_Sale in Ads, and My Product Summer_Sale in the CRM, use a pattern with a space delimiter and position 3.

- **Classification**—Select if the field names that you connect your CRM and campaign data to are different. For example, the campaign is named Summer-campaign in Ads, and My Product Summer_Sale in the CRM. To fix this issue, you can upload a classification file that categorizes your fields so the platform can recognize the matching fields when they have different names.

10. After you preview the tables for each data source, click **Finish**.

View Marketing Insights for Sales Cloud

Use the Marketing Insights for Sales Cloud dashboard to understand how your marketing efforts and spend are converting into revenue.

> **Note:** The dashboard that's created with this app is read-only and can't be modified.

The Dashboard contains these tabs:

Tab	Description
Customer Acquisition	Get a high-level overview of your campaign's performance.
	View your sales funnel and how your spend and revenue are performing in correlation. Also view your conversion rate between opportunities and closed-wons and the average time an opportunity takes to convert to a closed-won.
Weak Links	Find the weak points within your sales funnel. Get the conversion rates of the different stages in your funnel and the average time it takes for a lead to move to the next step.
Budget Justification	Get the information you must justify budget allocation to your stakeholders. See the cost of the spend and how it's converted throughout the cycle to leads, opportunities, revenue, and return on investment.

Manage Cross-Channel App Credentials

Use the app credentials manager to view data sources that you added to your cross-channel apps and the credentials for each data source. When connecting third-party platforms to your apps, you can add new account credentials, refresh, or update existing credentials. If a data error occurs with your app, you can access and edit the credentials or log a support ticket.

In the Apps Credentials Manager table, view data source information such as the creator and the last time the source was authenticated. You can also edit the user names and passwords for the data sources.

1. In the Cross-Channel tab, click **Manage Apps Credentials**.

2. Click the data source that you want to edit.

3. Click **Edit**.

4. After the platform credential window opens, you can edit the credentials.

Queries

Use Queries to pull granular data and get insights on your subscriber level data. For example, learn which subscribers engaged in a particular journey or investigate messages sent to a specific subscriber. Explore and export results for a deeper understanding of your data.

You can create a query using either the Query Builder or SQL. The Query Builder is a clicks-no-code tool. You can create queries automatically based on selected dimensions and measurements. If you prefer to write queries manually, or need to schedule a large data extract, you can use a SQL editor.

EDITIONS

Available in: Intelligence Reports Advanced

Queries Data View

When querying your data in Intelligence Reports Advanced, there are many fields available. You can view the available data set fields in the Queries tab, in the Data Set tab in the left pane. Queries unify all the available fields into one Engagement Data table.

Calculated KPI Formulas and Common SQL Functions

You can include calculated KPI formulas in your queries, such as 'push open rate' using the SQL tool in Queries.

Query Builder

Use the Query Builder to create queries without code. Select dimensions, measurements, and then and run your query all within one place. You can also create custom builder calculations inside the Query Builder to create custom fields.

Query Your Data with SQL

You can create queries manually using an SQL editor. You can also use or modify one of the predefined queries in the Query Library. These represent commonly used queries in Query Builder and SQL formats.

Querying Data Extensions

You can create queries with your engagement data and data extension data all in one place.

Export Your Query Results

Download or export query results to S3, SFTP, Google Cloud Platform, Azure Blob, or email and define an ongoing schedule.

Query Export Options

After you create and run your queries, you can download the results locally, export, and schedule an export for your results.

Query Limitations

There are two tools you can use to create queries, the query builder and SQL. SQL should be used for more complex use cases. If you experience any limitations with the preview or downloading your data, consider the export or schedule export options.

Contact Deletion in Intelligence Reports Advanced

Data protection and privacy compliance is a top priority for Intelligence Reports Advanced. If a contact is deleted through the contact deletion framework, the subscriber key is deleted in Intelligence Reports within seven days. The events linked to the subscriber aren't deleted and are anonymously reflected in reports with no identifiable subscriber information.

Queries Data View

When querying your data in Intelligence Reports Advanced, there are many fields available. You can view the available data set fields in the Queries tab, in the Data Set tab in the left pane. Queries unify all the available fields into one Engagement Data table.

EDITIONS

Available in: Intelligence Reports Advanced

📝 **Note:** The time zone for the data in the queries module is set to UTC +0, for both SQL and Query Builder

Field Name	Description	Type	Example Values
audience_name	The name of the audience that the email or message was sent to.	Dimension	VIP Customers, Birthday Today
audience_type	The audience type: List or Data Extension.	Dimension	List, Data Extension
business_unit	The name of the business unit that sent the message.	Dimension	NTO Rewards
business_unit_id	The ID of the business unit.	Dimension	1300648
campaign	The Marketing Cloud Engagement campaign at the time of the send (if assigned).	Dimension	Welcome, Post-Purchase
campaign_code	The campaign's code (as given by the user).	Dimension	Welcome, Post-Purchase
campaign_end_date	The campaign's end date.	Dimension	01 Jan 2021
campaign_id	The campaign's internal ID.	Dimension	111
campaign_start_date	The campaign's start date.	Dimension	01 Jan 2021
campaign_status	The campaign's status.	Dimension	InProcess, Deployed
channel	The messaging channel type	Dimension	Email, Mobile Push
contact_entry_mode	This mode dictates when the contact is eligible to enter a journey.	Dimension	Single Entry Across All Versions, Multiple Entries
country_code	The country code of the user who engaged with the email. Note: • Only available for the U.S. • Not always available or accurate due to dependencies on mail proxy servers, VPNs, and privacy controls.	Dimension	BR
email_domain	The email domain for the message that was sent, such as yahoo.com or gmail.com.	Dimension	gmail.com, salesforce.com
email_job_id	The unique identifier of the email sent.	Dimension	97797, 94910

Field Name	Description	Type	Example Values
email_name	The email name at the time of send.	Dimension	Shipping Notification, Birthday
email_pre_header	The email preheader. A preheader is the text following the subject line when an email is previewed. A preheader is one of the first three items that a subscriber sees when viewing an email.	Dimension	Welcome, Order today and save!
email_send_type	The type of message sent. Triggered--Anything that uses event-driven sending queues, such as SOAP triggered sends and Transaction Journey and REST APIs. Standard--Includes batched-based sending, for example, sending by a list or by a data extension through Automation Studio or Email Studio.	Dimension	Triggered, Standard
email_sender_address	The email sender's address.	Dimension	welcome@northerntrailoutfitters.net, postpurchase@northerntrailoutfitters.net
email_sender_name	The email sender's name.	Dimension	Northern Trail Outfitters, NTO
email_status	The email job status at the time of send.	Dimension	New
email_subject	The email subject at the time of send.	Dimension	A 20% off Welcome from NTO, Thanks for your purchase from NTO!
email_test_indicator	A flag that indicates this message was part of a test send.	Dimension	true, false
enterprise	The name of the enterprise account ("parent") that sent the message.	Dimension	Northern Trail Outfitters
enterprise_id	The ID of the enterprise account ("parent").	Dimension	1079707
event_date	The date and time an event, such as an open or click, occurred.	Dimension	2021-09-22 13:12:36.0

Field Name	Description	Type	Example Values
journey_activity_name	The journey activity name.	Dimension	Welcome - Step 4, Post-Purchase Step 1
journey_activity_type	The journey activity type.	Dimension	EMAILV2
journey_created_date	The date the journey was created.	Dimension	01 Jan 2021
journey_description	The journey description.	Dimension	Cross-Channel Journey encouraging contacts to review items and purchase additional recommended items
journey_id	The internal unique identifier of the journey and its version.	Dimension	792E3165-29F6-4EF0-ABCD-204740FE9EC1
journey_last_published_date	The last date that the journey was published.	Dimension	01 Jan 2021
journey_modified_date	The last date that the journey was modified.	Dimension	01 Jan 2021
journey_name	The journey name.	Dimension	Welcome, Post Purchase
journey_status	The journey status: Draft, Running, Paused, Finishing, or Stopped.	Dimension	Published
journey_version	The journey version.	Dimension	78
mobile_app	The app name that the message was sent to.	Dimension	2827E0F5-570A-4B89-A76A-5FCB603C5359
mobile_app_version	The version of the app that sent the message.	Dimension	4.200713.04
mobile_device_language	The language code of the device that the message was sent to. For example, en_us.	Dimension	en_US
mobile_device_model	The hardware model of the device that the message was sent to..	Dimension	iPhone8
mobile_device_os	The device operating system that the message was sent to. Either iOS or Android.	Dimension	iPhone OS
mobile_device_os_version	The mobile device's operating system version that the message was sent to.	Dimension	14.6

Field Name	Description	Type	Example Values
mobile_sdk_version	The version of the MobilePush SDK that sent the message.	Dimension	7.2.1
push_content_name	The name of the content used in the send.	Dimension	Mobile Message June 23, 2021(1:43:40 PM)
push_send_name	The name of the send definition. (For Mobile Studio sends, the Message Name; for Transactional API sends, the DefinitionKey; for Journey Builder sends, the Activity Name.)	Dimension	Daily Deal
push_send_type	The type of message sent: • Triggered-- Anything that uses event-driven sending queues, such as SOAP triggered sends and Transaction Journey and REST APIs. • Standard--Includes batched-based sending, for example, sending by a list or by a data extension through Automation Studio or Mobile Studio.	Dimension	Interaction
region_code	The state of the user who engaged with the email. Note: • Only available for the U.S. • Not always available or accurate.	Dimension	IL
subscriber_id	The system-defined unique identifier for a contact.	Dimension	11111111
subscriber_key	The unique identifier you define for a contact.	Dimension	user1

Calculated KPI Formulas and Common SQL Functions

You can include calculated KPI formulas in your queries, such as 'push open rate' using the SQL tool in Queries.

This table includes examples of common SQL functions and formulas for calculated KPIs.

Output	Function	Category	Example
Email Bounce Rate	sum(email_bounces)/sum(email_sends) as email_bounce_rate	Calculated Measurement	3.02%
Email Click Rate	sum(email_unique_clicks)/sum(email_sends-email_bounces) as email_click_rate	Calculated Measurement	2.66%
Email Click To Open Rate	sum(email_unique_clicks)/sum(email_unique_opens) as email_click_to_open_rate	Calculated Measurement	9.17%
Email Deliveries	sum(email_sends)-sum(email_bounces) as email_deliveries	Calculated Measurement	74
Email Delivery Rate	(sum(email_sends)-sum(email_bounces))/sum(email_sends) as email_delivery_rate	Calculated Measurement	96.98%
Email Open Rate	sum(email_unique_opens)/sum(email_sends-email_bounces) as email_open_rate	Calculated Measurement	29.00%
Email Unsubscribe Rate	sum(email_unique_unsubs)/sum(email_sends-email_bounces) as email_bounce_rate	Calculated Measurement	0.54%
Event Month	date(date_trunc('month', event_date))	Date	01 Aug 2021
Event Quarter	date(date_trunc('quarter', event_date))	Date	01 Jul 2021
Event Week	date(date_trunc('week', event_date))	Date	02 Aug 2021
Event Weekday	format_datetime(event_date, 'EEEE')	Dimension	Friday
Event Year	date(date_trunc('year', event_date))	Date	01 Jan 2021
Push Bounce Rate	sum(push_bounces)/sum(push_sends) as push_bounce_rate	Calculated Measurement	3.02%
Push Deliveries	sum(push_sends)-sum(push_bounces) as push_deliveries	Calculated Measurement	74
Push Delivery Rate	(sum(push_sends)-sum(push_bounces))/sum(push_sends) as push_delivery_rate	Calculated Measurement	96.98%
Push Open Rate	sum(push_opens)/sum(push_sends-push_bounces) as push_open_rate	Calculated Measurement	29.00%
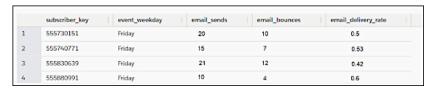
Output	Function	Category	Example
Send Month	date(date_trunc('month', send_date))	Date	01 Aug 2021
Send Quarter	date(date_trunc('quarter', send_date))	Date	01 Jul 2021
Send Week	date(date_trunc('week', send_date))	Date	02 Aug 2021
Send Weekday	format_datetime(send_date, 'EEEE')	Dimension	Friday
Send Year	date(date_trunc('year', send_date))	Date	01 Jan 2021

Here is an example of how to use Event Weekday and Email Delivery Rate formulas from the calculated KPI formula table, in order to retrieve the email delivery rate per subscriber and weekday.

```
select subscriber_key,format_datetime(event_date, 'EEEE') as event_weekday, sum(email_sends)
 as email_sends, sum(email_bounces) as email_bounces,
(sum(email_sends)-sum(email_bounces))/sum(email_sends) as email_delivery_rate
from engagement_data
Where event_date between (now()- INTERVAL '7' DAY) and now()
group by subscriber_key,  format_datetime(event_date, 'EEEE')
having sum(email_sends)>0
```

Here you can see the results of the email delivery rate per subscriber and weekday:

	subscriber_key	event_weekday	email_sends	email_bounces	email_delivery_rate
1	555730151	Friday	20	10	0.5
2	555740771	Friday	15	7	0.53
3	555830639	Friday	21	12	0.42
4	555880991	Friday	10	4	0.6

Query Builder

Use the Query Builder to create queries without code. Select dimensions, measurements, and then and run your query all within one place. You can also create custom builder calculations inside the Query Builder to create custom fields.

EDITIONS

Available in: Intelligence Reports Advanced

Query Your Data with Query Builder

Create queries automatically based on selected dimensions and measurements with clicks-no-code. You can also use or modify one of the predefined queries in the Query Library. They represent commonly used queries in Query Builder and SQL formats.

Builder Calculations in the Query Builder

Use a builder calculation to create a custom field, such as click rate and open rate, directly in the Query Builder without using SQL code.

Query Your Data with Query Builder

Create queries automatically based on selected dimensions and measurements with clicks-no-code. You can also use or modify one of the predefined queries in the Query Library. They represent commonly used queries in Query Builder and SQL formats.

1. On the **Queries** tab, click **Create New Query**.

2. Name your query.

3. Select **Builder**, and click **Create**.

4. Build your query.

a. Click the **+** icons to add the dimensions (1), metrics (2), and filters (3).

b. Run your query (4), and view the query results (5).

c. You can save your query (6) and view it later in the Query Library (7).

d. You can download or export your query results (8) and perform scheduled exports on saved queries.

Builder Calculations in the Query Builder

Use a builder calculation to create a custom field, such as click rate and open rate, directly in the Query Builder without using SQL code.

A builder calculation differs from a calculated measurement, which is used in a pivot table, report, or dashboard. You can use a builder calculation only when using the Query Builder in the Queries tab. Calculations can be used in a query with attributes from connected data extensions, thus enabling you to answer questions, such as what is the click rate per city?

Create a Builder Calculation

Use a builder calculation to create a custom measurement when you have subscriber-level data and you want more information, such as click rates or open rates. For example, you have geographical location data and you want to see the click rate per city.

Click Rate Builder Calculation Example

Use this example to see how data is pulled from connected data extensions (regions) and engagement data (sends, bounces, and clicks).

EDITIONS

Available in: Intelligence Reports Advanced

USER PERMISSIONS

To use the Query Builder:
- Create & Edit

EDITIONS

Available in: Available in: Intelligence Reports Advanced

Create a Builder Calculation

Use a builder calculation to create a custom measurement when you have subscriber-level data and you want more information, such as click rates or open rates. For example, you have geographical location data and you want to see the click rate per city.

1. On the Queries tab, click **Create New Query**.

2. Name your query.
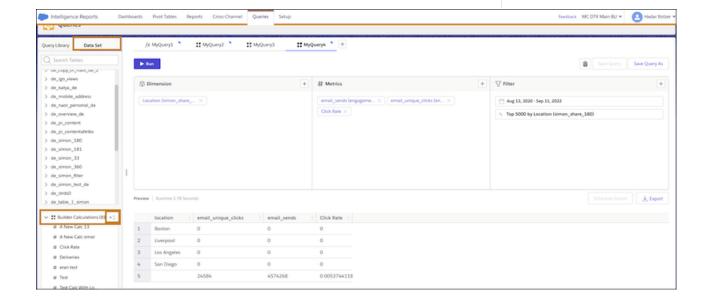
3. Select **Builder**, and click **Create**.

4. On the left side, click the **Data Set** tab.

5. To add a builder calculation, under **Builder Calculations**, click the plus sign.
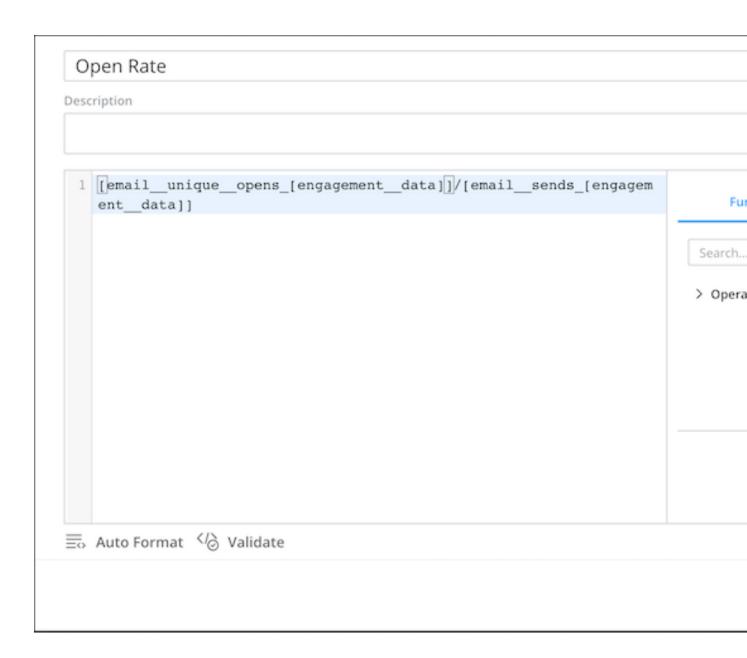
6. Name the measurement, and add an optional description.

7. Enter the logic. Here's an example of an open rate measurement.

8. Save your work.

9. To use the builder calculation in your query, on the **Measurements** tab, click the plus sign.

10. From **Builder Calculations**, select the measurement.

11. Run your query.

SEE ALSO:

Click Rate Builder Calculation Example

Click Rate Builder Calculation Example

Use this example to see how data is pulled from connected data extensions (regions) and engagement data (sends, bounces, and clicks).

Region	Sends	Bounces	Clicks
EMEA	100	5	50
AMER	150	15	65
APAC	90	10	20

Builder Calculations

Logic

Delivered = Sends - Bounces

Formula

```
[email__sends_[engagement__data]] - [email_bounces_[engagement_data]]
```

Logic

Click Rate = Clicks/(Sends - Bounces)

Formula

```
[email_unique_clicks_[engagement_data]] / ([email_sends_[engagement_data]] -
[email_bounces_[engagement__data]])
```

Query Results

The builder calculations produce these query results.

Region	Delivered	Click Rate
EMEA	95	0.52
AMER	135	0.48
APAC	80	0.25

Query Your Data with SQL

You can create queries manually using an SQL editor. You can also use or modify one of the predefined queries in the Query Library. These represent commonly used queries in Query Builder and SQL formats.

📝 **Note:** The syntax used in SQL queries is Presto SQL.

1. On the **Queries** tab, click **Create New Query**.

2. Name your query.

3. Select **SQL**, and click **Create**.

4. Write your query.

a. Create your query (1) and then run (2) it to view the results.

b. You can save your query (4) and view it later in the Query Library (5).

c. You can download or export your query results (6) and perform scheduled exports on saved queries.

To use SQL Queries most efficiently:

- To wrap a value in quotes, highlight the value and then type " **'** "

- To run only a portion of the query in the SQL window, highlight the section and then click **Run**.

- To copy the value of a cell in the results, right-click the cell and click **Copy**.

Querying Data Extensions

You can create queries with your engagement data and data extension data all in one place.

Before you can query data extensions, you first need to connect to data extensions in the Setup tab. For more information, see Connect to a Data Extension on page 193

After you connect a data extension it appears in its own table in the Library. You can then either use SQL or the Query Builder to query the data.

Create a Query with a Data Extension

Create a query with data extensions to view your engagement data with your data extension data. For example, view total clicks per region.

Create a Query with a Data Extension

Create a query with data extensions to view your engagement data with your data extension data. For example, view total clicks per region.

To query the data extension you can use SQL or the Query Builder. If you're using SQL, you can create complex use cases. If you're using the Query Builder and you want to query both engagement data and extension data in the same query, you must make sure you created a join before creating the query.

In this example, you can see how to query engagement data and data extension data using the Query Builder.

1. On the Queries tab, click **Create New Query**.

2. Name your query.

3. Select **Builder**, and click **Create**.
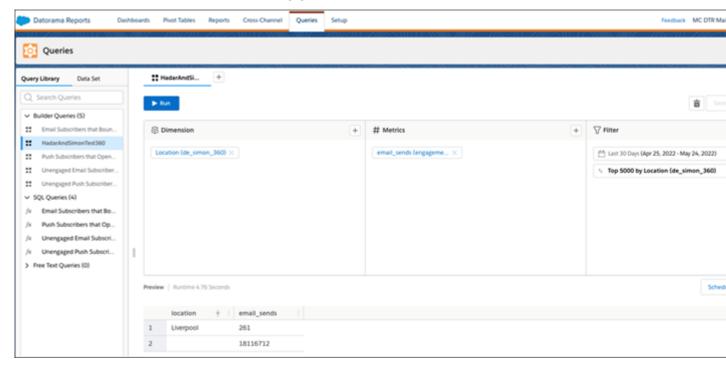
4. Build your query.

For example, create a query to view total clicks per region. In this example, the dimension is Location (taken from the data extension) and the measurement is email_sends (taken from the engagement data).

5. If you're using SQL, here's an example of a join that produces the same results.

```
select data_extension.Region, sum(data_extension.email_unique_clicks)
from engagement_data left join data_extension on engagement_data.subscriber_id =
data_extension.ID
group by data_extension.Region
```

6. To run the query, click **Run**

Export Your Query Results

Download or export query results to S3, SFTP, Google Cloud Platform, Azure Blob, or email and define an ongoing schedule.

1. On the **Queries** tab, create a query or select a saved one.

2. Run the query.

3. To download the query results locally, select **Download**. Only the first 20,000 rows are downloaded.

4. To export all the data, click **Export To** and select the format.

5. To export on a scheduled basis, click **Scheduled Export**. The options change according to the format you select. After you set the delivery method and enter your credentials, set the frequency. For example, set daily to export the results on a daily basis.

6. Save your work.

EDITIONS

Available in: Intelligence Reports Advanced

USER PERMISSIONS

To Export Query Results:
- Create & Edit

After you save, to view your execution history, go to **Options** and then select **Export History**.

SEE ALSO:

Query Export Options

After you create and run your queries, you can download the results locally, export, and schedule an export for your results.

> 📝 **Note:** Limitations apply to selected export methods, based on the query tool you're using - SQL or Builder. See Query Limitations on page 161 for more information.

Action	Description
Download	Download your query locally on your computer. File format: CSV
Export to	Export your query results directly to your preferred location. Delivery Methods: • S3 • SFTP • Azure Blob • Google Cloud Storage • Email (By default, the file format for email is CSV Friendly Formatting and can't be modified) File Format: • ORC • PARQUET • CSV
Schedule Export	Schedule an export to automatically export your query results based on the frequency you select. Delivery Methods: • S3 • SFTP • Azure Blob • Google Cloud Storage • Email (By default, the file format for email is CSV Friendly Formatting and can't be modified) File Format: • ORC

Action	Description
	• PARQUET
	• CSV
	Frequency Options:
	• Hourly
	• Daily
	• Weekly
	• Bi-Weekly
	• Monthly
	• Quarterly
	• Yearly

Query Limitations

There are two tools you can use to create queries, the query builder and SQL. SQL should be used for more complex use cases. If you experience any limitations with the preview or downloading your data, consider the export or schedule export options.

This table presents the different actions and their limitations:

Action	Limitation
UI Preview	Timeout: 10 Min
	Returned Rows: 5,000
Download	Returned Rows: 20,000
Export to	File Formats: PARQUET, ORC, CSV, and CSV Friendly Formatting
	CSV Friendly Formatting is limited to 2.3M rows in the results.
Scheduled Export	File Formats: PARQUET, ORC, CSV, and CSV Friendly Formatting
	CSV Friendly Formatting is limited to 2.3M rows in the results.

EDITIONS

Available in: Intelligence Reports Advanced

Contact Deletion in Intelligence Reports Advanced

Data protection and privacy compliance is a top priority for Intelligence Reports Advanced. If a contact is deleted through the contact deletion framework, the subscriber key is deleted in Intelligence Reports within seven days. The events linked to the subscriber aren't deleted and are anonymously reflected in reports with no identifiable subscriber information.

EDITIONS

Available in: Intelligence Reports Advanced

SEE ALSO:

[Contact Deletion in Contact Builder](#)

Calculated Fields

Create calculated fields in Intelligence Reports Advanced when you need customized dimensions and measurements.

Calculated fields are created in the Setup tab and can then be used in dashboards, pivot tables and reports.

EDITIONS

Available in: Intelligence Reports and Intelligence Reports Advanced

[Calculated Dimensions](#)

Calculated Dimensions are non-numerical fields or dimensions that you can create on top of your existing data. Calculated dimensions don't exist physically in the database. Rather, each calculated dimension represents a query that can be referenced to from any report, pivot table, and dashboard page.

[Calculated Measurements](#)

Calculated measurements are numerical custom calculations that you can create on top of your existing data. You can create calculated fields from the widget editor, referencing dimensions and measurements, as well as functions and operators.

Calculated Dimensions

Calculated Dimensions are non-numerical fields or dimensions that you can create on top of your existing data. Calculated dimensions don't exist physically in the database. Rather, each calculated dimension represents a query that can be referenced to from any report, pivot table, and dashboard page.

EDITIONS

Available in: Intelligence Reports Advanced

You can create a calculated dimension from the widgets in the dashboard pages, and there are many functions you can use. Maintenance is easy and flexible. And any change you make in the calculated dimension is automatically applied wherever it's used across your workspace.

You can use calculated dimensions to:

- Consolidate dimensions – If you have dimensions that display long names, such as email addresses, use the IF function to extract the name of the email without manipulating the actual data that you bring into Intelligence Reports.

  For example: `IF([Email_Domain] contains 'hotmail.autonto.com', 'Hotmail'])`

- Remove unwanted characters – If a dimension value includes characters that you want to extract, use the Extract() function. Allowing you to extract the substring, at the given position, after splitting by the given delimiter.

  For example, `EXTRACT([Email_Name],'-',0)` extracts the email name.

Create a Calculated Dimension

Create calculated dimensions on top of existing data so you can refer to them from different tabs. You can also create calculated dimensions from a widget on a dashboard page. Calculated dimensions created from widgets appear in the calculated dimension part of the Setup tab.

📝 **Note:** You can create up to 20 additional calculated dimensions at one time per business unit. This number does not include the available pre-canned dimensions.

1. From Analytics Builder, select **Intelligence [Datorama] Reports**.

2. Select the **Setup** tab.

3. Expand **Calculated Dimensions** and click **Create Calculated Dimensions**.

4. Define your calculated dimension:

   In the **General** section:

   - Name your calculated dimension.

   - Select the type of calculated dimension you want to create:

     - **Text** — Appears as a string (numbers appear as numbers not text).
     - **Number** — Appears as a number.
     - **Date** — Appears in a date format (according to your settings).
     - **Link** — An active link.
     - **Image** — Appears as a thumbnail.
     - **Video** — Appears as a link to the video in a new browser tab.

       📝 **Note:** The 'type' affects the formats available in the dashboard widget settings, in most cases, you should set the type to Text.

   - Add a description of the calculated dimension.

   In the **Advanced** section, you can define advanced settings such as:

   - **Related Measurement** — Select a measurement that is linked to your calculated dimension's formula, to enable you to populate lists with calculated dimension values - for example, you have a calculated dimension that returns Email Name with the related measurement of Clicks. When this calculated dimension is used in a widget, the returned Email Name values will only be of

EDITIONS

Available in: Intelligence Reports Advanced

USER PERMISSIONS

To Create a Calculated Dimension:
- Create & Edit

emails that had at least 1 click within the date range that the page is filtered on. If no related measurement is used, all Email Names are returned, including those without clicks.

- **Invisible Dimension** — Select this checkbox to hide any widget that contains this calculated dimension from users who do not have the 'Create and Edit' permission.

In the **Expression** section, insert the expression you want to base the calculated dimension on. For example, if your customer's Email Names consist of multiple concatenated values, you can create calculated dimensions to extract these values and create fields out of them using the formula: `EXTRACT([Email_Name],'_',1)`.

On the right-side menu, use the list of available dimensions and functions to create your expression. Click on a function to add it to your expression or start typing for auto-complete. You can use any of the available functions together with any of your available fields.

You can also use any of these options that appear at the bottom of the expression screen:

- **Full Screen** — Click here to view the Expression section in full-screen mode.
- **Auto Format** — Click here to format your code into the standard correct structure.
- **Comment** — Click here to enter a comment within your expression.
- **Uncomment** — Click here to remove your comment from the expression.
- **Code Validation** — Click here to validate that your expression is accurate.
- **Test** — Click here to test your expression.

5. Click **Save**.

Calculated Dimension Functions

You can use Functions when creating calculated dimensions.

The functions are divided into these categories:

- Number Functions
- Text Functions
- Date Functions
- Aggregation Functions
- Logical Functions
- Type Conversion
- Content Functions

The following tables summarize the available functions for calculated dimensions.

Table 5: Number Functions

Function Name	Syntax	Description
ABS	ABS(number)	Returns the absolute value of a number.
CEILING	CEILING(number, significance)	Rounds the number up, away from zero, to the nearest multiple significance.
FLOOR	FLOOR(number, significance)	Rounds the number down towards zero, to the nearest multiple significance.
RAND	RAND()	Gets a random number between 0 and 1.

Function Name	Syntax	Description
ROUND	ROUND(number)	Rounds a number to the nearest integer.
ROUND	ROUND(number, num_digits)	Rounds a number to a specified number of digits.

Table 6: Text Functions

Function Name	Syntax	Description
CHAR	CHAR(number)	Returns a character specified by a number.
COALESCE	COALESCE([value1, value2,...])	Returns the first value from the list that isn't empty.
CODE	CODE(text)	Returns a numeric code for the first character in a text string.
COUNT_CHAR	COUNT_CHAR(text, charToCount)	Counts how many times a specific character appears in a text.
EXTRACT	EXTRACT(text, delimiter, position)	Extracts from the given text the substring, at the given position, after splitting by the given delimiter. For example, EXTRACT('a,b,c','_',1) returns 'b'.
FIND	FIND(findText, withinText)	Returns the starting position of findText withinText. Returns -1 if withinText doesn't contain findText.
FUZZYMATCH	FUZZYMATCH(valueToMatch, array, threshold)	Searches for a string in an array of values that potentially match using duplicate-detection algorithms that calculate the similarity of two streams of data. Returns the matched string from the array if there's a match or, if no matches are found, returns an empty string. For example, FUZZYMATCH("ABC Company",{"ABC Company Inc","Apple Inc","IBM Company"},0.8) returns "ABC Company Inc". The threshold parameter must be a value between 0 and 1. A threshold of 1 means an exact match.
GET_EXCHANGE_RATE	GET_EXCHANGE_RATE(date, fromISO, toISO)	Get the exchange rate for the given currencies and date. The 'date' variable in the formula can be a mapped date field or a date function For example:

Function Name	Syntax	Description
		• GET_EXCHANGE_RATE([Day], 'USD', 'GBP')
		where [Day] is a mapped date field
		• GET_EXCHANGE_RATE(DATE('2015','8','17'),'USD','GBP')
		where DATE('YYYY','MM','DD') is a date function.
		• GET_EXCHANGE_RATE(YESTERDAY(),'USD','GBP')
		where YESTERDAY() is a date function.
INDEXOF	INDEXOF(array, findText)	Searches the array for the specified item, and returns its position.
		Returns -1 if the item isn't found.
		If the item is present more than once, the INDEXOF function returns the position of the first occurrence.
		For example, INDEXOF(csv['row'], 'Campaign ID') == 0 returns true if 'Campaign ID' was found in the first cell.
		Note: The first item has position 0, the second item has position 1, and so on.
ISEMPTY	ISEMPTY(value)	Returns if the value is empty or not.
LEFT	LEFT(text, numOfChars)	Returns the requested number of characters from the left.
LEN	LEN(text)	Returns the number of characters in the given text
LOWER	LOWER(text)	Converts all upper-case letters in a string to lower-case letters.
MATCH	MATCH(valueToMatch, array)	Searches for a specified item in an array of values, and then returns a boolean result. For example, MATCH(1,{1,2,3}) returns true because the value '1' exists in the array.
PROPER	PROPER(text)	Capitalizes the first letter in a text string and any other letters in text that follow any character other than a letter. Converts all other letters to lowercase letters.
REPLACE	REPLACE(SourceStr, pattern, targetStr)	Replaces every match of a pattern (a regex expression) in sourceStr to targetStr. For example, REPLACE('All-The-Best', '-', ' ')

Function Name	Syntax	Description
		returns 'All The Best'. In another example, REPLACE('Let It Be','\\s','-') returns 'Let-It-Be'.
RIGHT	RIGHT(text, numOfChars)	Returns the requested number of characters from the right.
SELECT	SELECT(sourceStr, pattern)	Selects the first match of the pattern (a regex expression) in the sourceStr. For example, SELECT('Hello B wow E Goodbye', 'B(.*?)E') returns 'B wow E'.
SEMTIMEN	SENTIMEN(text)	Extracts a positive, neutral, or negative sentiment from the given text.
SPLIT	SPLIT(text, delimiter)	Splits a text string into an array by using a delimiter character. It returns a zero-based, one-dimensional array holding the parts of the original text string. For example, SPLIT('a,b,c', ',') returns an array with three items.
SUBSTITUTE	SUBSTITUTE(text,oldText,newText)	Substitutes newText for oldText in a text string. Use SUBSTITUTE when you want to replace specific text in a text string.
SUBSTRING	SUBSTRING(text,beginIndex,endIndex)	Returns the substring of the text beginning at beginIndex (inclusive) and ending at endIndex (exclusive).
TRIM	TRIM(text)	Removes all spaces from the text except for single spaces between words.
UPPER	UPPER(text)	Converts all lowercase letters in a text string to uppercase.
URL_DECODE	URL_DECODE(text)	Decodes an application/x-www-form-urlencoded string using a UTF-8 encoding scheme.
URL_ENCODE	URL_ENCODE(text)	Translates a text into an application/x-www-form-urlencoded format using a UTF-8 encoding scheme.
VALUE_FROM_JSON	VALUE_FROM_JSON(JSON string, key)	Returns the value for a given key in a JSON string. If the key doesn't exist or the JSON is empty, an empty string is returned.

Table 7: Date Functions

Function Name	Syntax	Description
DATE	DATE(year, month)	Returns the first day of the given month in the given year.
DATE	DATE(year, month, day)	Returns the date representing the given arguments.
DATEADD	DATEADD(interval, number, date)	Returns the date after a specific time or date interval was added. The interval must be one of 'yyyy' (year), 'q' (quarter), 'm' (month), 'd' (day), 'ww' (week), 'h' (hour), 'n' (minute), or 's' (second).
DATEDIFF	DATEDIFF(interval,startDate,endDate	Returns the number of time units specified by the interval between the startDate and the endDate. The startDate and endDate arguments must be date objects or date strings in standard form. The interval must be one of 'yyyy' (year), 'q' (quarter), 'm' (month), 'd' (day), 'ww' (week), 'h' (hour), 'n' (minute), or 's' (second).
DAYPRECISION	DAYPRECISION(date)	Returns the given date with day precision, meaning the hours, minutes, and seconds fields are all set to 0. For example, the date '12-Jun-2012 16:34' is converted to '12-Jun-2012 00:00'.
DAYSBETWEEN	DAYSBETWEEN(startDate, endDate)	Returns the number of days between the given startDate and endDate. The arguments must be date objects or date strings in standard form.
DAYSINMONTH	DAYSINMONTH(date)	Returns the number of days in a specified month.
NETWORKDAYS	NETWORKDAYS(startDate, endDate)	Returns the number of workdays between two dates, excluding weekends. The arguments must be date objects or date strings in standard form.
NOW	NOW()	Returns the current system date and time.
SETHOUR	SETHOUR(date, hour)	Returns the given date set with the given hours, with the hours being a numeric value from 0 through 23.
TODAY	TODAY()	Returns the current system date.
TOSECONDS	TOSECONDS(duration)	Returns the number of seconds represented by the given duration string, with the format HH:mm:ss/HH:mm:ss.SSS.

Function Name	Syntax	Description
YESTERDAY	YESTERDAY()	Returns yesterday's system date.

Table 8: Aggregation Functions

Function Name	Syntax	Description
GROUPCONCAT	GROUPCONCAT(groupedDimension, keyDimension, separator)	Concatenates the values of groupedDimension by keyDimension, with the separator string between each two grouped values. This process is done uniquely, that is, the same value repeated isn't concatenated twice. For example, GROUPCONCAT({Media Buy Name}, {Campaign Name}, ',') results in all media buy names concatenated (with no repetitions) for each campaign.

Table 9: Logical Functions

Function Name	Syntax	Description
AND	AND(condition1, condition2)	Logical AND, checks to see that both conditions are true.
IF	IF(condition,resultifTrue,resultifFalse)	Returns the second argument if the first argument is true, and the third argument if otherwise.
IFERROR	IFERROR(someExpression, number)	Returns the someExpression if it's a valid number, otherwise returns a number.
NOT	NOT(condition)	Logical NOT, reverses the logic of its argument, true becomes false and vice versa.
OR	OR(condition)	Logical OR, checks to see if either one of the conditions is true.

Table 10: Type Conversion Functions

Function Name	Syntax	Description
COMPRESS	COMPRESS(value1)	Compresses a string using gzip, and returns it in base64.
DECODE_BASE64	DECODE_BASE64(value1)	Decodes a string from base64.
DOUBLE	DOUBLE(value1)	Converts a string to a double.
ENCODE_BASE64	ENCODE_BASE64(value1)	Encodes a string to base64.

Function Name	Syntax	Description
FORMATDATE	FORMATDATE(date, pattern)	Returns the string representation of the given date according to the supplied pattern. For example, 'yyyy-MM-dd' --> 2014-02-25, 'dd MMM-yyyy' --> 25 Feb-2014, etc.
FORMATDATE_DEFAULT	FORMATDATE_DEFAULT(date)	Returns the default (yyyy-MM-dd HH:mm:ss.S) Intelligence Reports string representation of the given date.
MD5	MD5(stringToHash)	Returns an MD5 hash of the given string.
NUMBER	NUMBER(value1)	Converts a string to a number
PARSEDATE	PARSEDATE(dateString, pattern)	Returns the date object specified by the given dateString using the given pattern. For example, '2014-02-25' ---> 'yyyy-MM-dd', '25 Feb-2014' ---> 'dd MMM-yyyy', etc.
SHA256	SHA256(stringToHash)	Returns a SHA256 hash of the given string.
STRIP_HTML	STRIP_HTML(value1)	Strips HTML from a string.
UNCOMPRESS	UNCOMPRESS(value1)	Uncompresses a base64 string using gzip.

Table 11: Context Functions

Function Name	Syntax	Description
CONTEXT_DIMENSION_CONTAINS	CONTEXT_DIMENSIONS_CONTAIN(dimension)	Returns a 'true' value if the given dimension is included in the query.
CONTEXT_DIMENSION_EQUALS	CONTEXT_DIMENSIONS_EQUALS(dimension)	Returns a 'true' value if the given dimensions are exactly the context dimensions. Enter all the relevant dimensions, but the order of appearance isn't important.
FilterEndDate	FilterEndDate()	Returns the end date of the query filter.
FilterStartDate	FilterStartDate()	Returns the start date of the query filter.
GET_ENV	GET_ENV(variableName)	Returns the value for the given environment variable. Possible values for variableName are: WORKSPACE_ID
QUERY_DIMENSIONS_CONTAIN	QUERY_DIMENSIONS_CONTAIN(dimension)	Returns a 'true' value if the given dimension is one of the query dimensions.
QUERY_DIMENSIONS_EQUAL	QUERY_DIMENSIONS_EQUAL([dimensions])	Returns a 'true' value if the given dimensions are exactly the query dimensions. Enter all

Function Name	Syntax	Description
		the relevant dimensions, but the order of appearance isn't important.

Calculated Dimensions Use Cases

Use these examples when creating calculated dimensions in Intelligence Reports Advanced to easily create fields. Each example contains an explanation with a code sample.

📝 **Note:** Calculated dimensions can be used in pivot tables, reports, and dashboards, not in queries.

Tips:

- For Equals use '=='
- For Or use '||'
- For And use '&&'
- For "not " use !(expression)

Extract From a Naming Convention

You want to create a dimension based on the naming convention of an existing dimension. For example, the Campaign field is built out of the following naming convention: countrycode_brandcode_ year_campaign "IL_CK_2022_Welcome"

Formula

EXTRACT(text,delimiter,position)

Description

Extracts the substring from the given text, at the given position, after splitting by the given delimiter. For example, EXTRACT('a_b_c', '_', 1) returns 'b'.

Example

To create a Brand Code field, use this function:

```
EXTRACT([Campaign],'_',1)
```

To create a Country field use this function:

```
EXTRACT([Campaign],'_',0)
```

Original Data Set

Campaign	Email Sends
IL_CK_2022_Welcome	50
IL_CK_2022_Birthday	25
FR_AB_2022_Welcome	70

Results with Calculated Dimension

Country	Email Sends
IL	75
FR	70

Extract from a Naming Convention and then Coalesce (between Mobile+Email)

For example, if you store Brand Code in the second position of Push Send Name and in the third position of Email Content Name. In this case you're unifying two different fields into one. For example, the Push Send Name field is built with this naming convention: Send Name_Region (e.g 'Welcome_EMEA). While the Email Content Name field is built with this naming convention: 'BrandCode_Send Name_Region' (e.g 'A_Birthday_AMER) If you want to create one unified field for the Region from both Email and Push, use the example formula.

Formula

COALESCE([value1, value2, ...])

Description

Returns the first value from the list that isn't empty.

Example

To create one field that contains Brand Code for both channels follow this logic.

```
var Brand_Mobile = EXTRACT([Push_Send_Name],'',1);
var Brand_Email = EXTRACT([Email_Content_Name],'',2);
return COALESCE([Brand_Mobile, Brand_Email]);
```

Email Data Set

Email Content Name	Email Sends
A_Birthday_AMER	10
B_Promotional_EMEA	30
B_Promotional_AMER	15

Mobile Data Set

Push Send Name	Push Deliveries
Birthday_AMER	10
Promotional_EMEA	20
Promotional_APAC	15

Results with Calculated Dimension

Region (Calc)	Email Sends	Push Deliveries
AMER	25	10

Region (Calc)	Email Sends	Push Deliveries
EMEA	30	20
APAC	0	15

Group Values of a Dimension

You want to group the values of a field together by category. For example, you want to group all 'Thank You' emails and all 'Welcome' emails.

Formula

IF(condition,resultIfTrue,resultIfFalse)

Description

Returns the second argument if the first argument is true, and the third argument if otherwise.

UPPER(text)

Description

Converts all lowercase letters in a text string to uppercase.

Examples

To create 2 groups of emails - one for Thank You messages and one for Welcome messages:

```
IF(UPPER([Email_Subject]) contains 'THANK','Thank-you messages',
IF(UPPER([Email_Subject]) contains 'WELCOME','Introduction messages',[Email_Subject]))
```

If you have multiple IF/Else cases, you can use this syntax. This is only a suggestion.

```
if(UPPER([Email_Subject]) contains 'THANK')
{ return 'Thank-you messages'; }
else if(UPPER([Email_Subject]) contains 'WELCOME')
{ return 'WELCOME'; }
else {return [Email_Subject];}
```

Original Data Set

Email Subject	Email Sends
Thanks for your purchase	10
Welcome to Northern Trail Outfitters!	20
A 20% off Welcome from NTO	15
Thanks for signing up	5
Welcome to NTO	10
Thank You for Reaching Out!	15
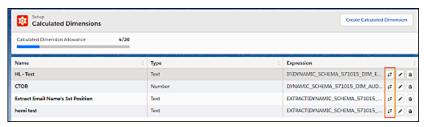
Results with Calculated Dimension

Grouped Subject (Calculated)	Email Sends
Thank-You Messages	30
Welcome Messages	45

Find and Replace Calculated Dimensions

You can use the find and replace function to search for a specific dimension, edit and replace the edited dimension across your entire business unit. You can do this without searching for the location of the calculated dimension, which is especially useful when creating a calculated dimension that is meant to replace an existing dimension.

1. From Analytics Builder, select **Intelligence [Datorama] Reports**.

2. Select the **Setup** tab.

3. Expand **Calculated Dimensions**.

4. Select a calculated dimension from the table.

5. Click the **Find and Replace** icon.
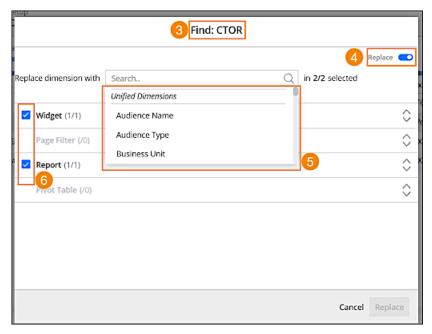
In the Find & Replace window (3), you can see where the selected calculated dimension is used across your business unit. For example, widgets, reports, or pivot tables.

Toggle on the **Replace** feature (4). From the dropdown, select the dimension that you want to replace the current calculated dimension with (5).

You can uncheck any location that you don't want to replace. For example uncheck a specific widget or report (6).

6. Click **Replace**.

Calculated Measurements

Calculated measurements are numerical custom calculations that you can create on top of your existing data. You can create calculated fields from the widget editor, referencing dimensions and measurements, as well as functions and operators.

Calculated measurements can be a simple mathematical expression that generates a calculation, or they can be a body of code with advanced conditioning and logic. You can use calculated measurements in dashboards, reports, or pivot tables.

Use Case

You want to calculate the key performance indicators (KPIs) in Intelligence Reports for Engagement, using a different formula. For example, in Intelligence Reports, the Email Open Rate is calculated by dividing the Unique Email Opens by the Email Deliveries. With calculated measurements, you can create another version of the Email Open Rate that uses the Email Sends as the denominator instead of the Email Deliveries. You can also create your own KPIs, in addition to the preconfigured measurements in Intelligence Reports using Calculated Measurements.

EDITIONS

Available in: Intelligence Reports Advanced

Create a Calculated Measurement

Create calculated measurements on top of existing data so you can refer to them in other tabs. You can also create calculated measurements from a widget on a dashboard page. Calculated measurements created from widgets appear in the calculated measurements section in the Setup tab.

Calculated Measurement Functions

Use functions when creating a calculated measurement in Intelligence Reports Advanced to make your functions more dynamic.

Calculated Measurements Use Cases

Use these examples when creating calculated measurements to easily create fields. Each example contains an explanation with a code sample.

Find and Replace Calculated Measurements

You can use the find and replace function to search for a specific measurement. Then, you can edit and replace the edited measurement across your entire business unit without finding every location where the calculated measurement is used. This feature is especially useful when creating a calculated measurement that is meant to replace an existing measurement across your business unit.

Create a Calculated Measurement

Create calculated measurements on top of existing data so you can refer to them in other tabs. You can also create calculated measurements from a widget on a dashboard page. Calculated measurements created from widgets appear in the calculated measurements section in the Setup tab.

EDITIONS

Available in: Intelligence Reports Advanced

USER PERMISSIONS

To create, edit, and apply filters
- Create & Edit

📝 **Note:** You can create up to 20 additional calculated measurements at one time per business unit. This number does not include the available pre-canned calculations.

1. From Analytics Builder, select **Intelligence [Datorama] Reports**.

2. In the **Setup** tab, expand **Calculated Measurements**, and click **Create Calculated Measurement**.

3. Define your calculated measurement:

In the **General** section:

- **Measurement Name** – Enter a name for your measurement.
- **Type** – Select the metric type, which is a numeric value, percentage, currency, or duration of time.
- **Decimal Places** – Select the number of decimal places in the measurement. The more decimal places you choose, the more exact the number is.
- **Color** – Select the color in which the calculated measurement appears in your collections.
- **Description** – Enter a description of the calculated measurement.

In the **Advanced** section:

- **Total Aggregation Function** – Defines what function is used to calculate the total value of a query. For example, SUM, AVG, MIN, or MAX. Values that appear in separate rows of a display are all aggregated in the Total row.
- **Granularity** – Determine the level the calculations for the measurement takes place. You can select a granular level that isn't included in the widget. For example, when setting the granularity to Job ID, even if you're visualizing the measurement at the Campaign Key level, the calculation still occurs at the job level.
- **Treat Nulls As Zeros** – To turn null values into zero, select this checkbox. This selection allows nulls to be used in the formulas.
- **Include Date in Granularity** – When it's in the query, to include the date in the granularity of the calculation, select this checkbox.
- **Invisible Measurement** – To hide widgets containing this measurement from users that aren't admins, select this checkbox.

In the **Expressions** section, insert the expression you want to base the calculated measurement on. For example, if you want to calculate Email Open Rate that uses Email Sends as the denominator instead of Email Deliveries, use this expression: `IFERROR([Email_Unique_Opens]/[Email_Sends], null)`. The `IFERROR` function results in the Calculated Measurement returning null values when the Email Sends equals 0.

- **Aggregation Function** – The Aggregation Function determines the calculation result for all the produced rows. When a granularity is set, the underlying calculation produces multiple calculation results, for multiple rows. These rows must be aggregated into a single row of the displayed dimension. When setting a granularity, you must define how the system performs this aggregation, for example, SUM, AVG, or MAX. On the right- hand side menu, use the list of available dimensions, functions and measurements to create your expression. Click on a field to add it to your expression or start typing for auto-complete. You can use any of the available functions together with any of your available fields.
- **Code Validation** – Check to see if your code is valid (doesn't include syntax errors).
- **Test** – Click to make sure that your code works and the data is extracted correctly.

4. Save your calculated measurement.

Calculated Measurement Functions

Use functions when creating a calculated measurement in Intelligence Reports Advanced to make your functions more dynamic.

The functions are divided into these categories:

- Number
- Text
- Date
- Aggregation
- Logical
- Type Conversion
- Context

Number Functions

Returns a numerical value.

Function Name	Syntax	Description
ABS	ABS(number)	Returns the absolute value of a number.
CEILING	CEILING(number,significance)	Rounds the number up away from zero to the nearest multiple significance.
EXP_TREND	EXP_TREND(metric)	Computes an exponential trend line for the given metric.
FLOOR	FLOOR(number,significance)	Rounds the number down toward zero to the nearest multiple significance.
LINEAR_TREND	LINEAR_TREND(metric)	Computes a linear trend line for the given metric.
LOG_TREND	LOG_TREND(metric)	Computes a log trend line for the given metric.
MOVING_AVG	MOVING_AVG(metric, windowSize)	Computes a moving average with the given window size. If windowSize is null or negative, a fully cumulative average is computed.
POWER_TREND	POWER_TREND(metric)	Computes a power trend line for the given metric.
RAND	RAND()	Gets a random number between 0 and 1.
ROUND	ROUND(number)	Rounds a number to the nearest integer. For example: ROUND(4.2) =4 ROUND(4.6) =5
ROUND	ROUND(number,num_digits)	Rounds a number to a specified number of digits.
TREND_SLOPE	TREND_SLOPE(metric, windowSize)	Computes the linear trend slope in the given window size. If windowSize is null or negative, a fully cumulative average is computed.

Text Functions

Function Name	Syntax	Description
CHAR	CHAR(number)	Returns a character specified by a number.
COALESCE	COALESCE([value1, value2,...])	Returns the first value from the list that isn't empty.

Function Name	Syntax	Description
CODE	CODE(text)	Returns a numeric code for the first character in a text string.
COUNT_CHAR	COUNT_CHAR(text,charToCount)	Counts how many times a specific character appears in a text.
EXTRACT	EXTRACT(text,delimiter,position)	Extracts from the given text the substring at the given position, after splitting by the given delimiter. For example, EXTRACT('a,b,c','_',1) returns 'b'.
FIND	FIND(findText,withinText)	Returns the starting position of findText withinText. For example, FIND('World', 'Hello World') returns 6. FIND('aoc', 'Hello World') returns -1.
FUZZYMATCH	FUZZYMATCH(valueToMatch, array, threshold)	Searches for a string in an array of values that potentially match using duplicate-detection algorithms that calculate the similarity of two streams of data. Returns the matched string from the array or an empty string if no matches are found. For example, FUZZYMATCH("ABC Compani",{"ABC Company Inc","Apple Inc","IBM Company"},0.8) returns "ABC Company Inc". The threshold parameter must be a value between 0 and 1. A threshold of 1 means an exact match.
GET_EXCHANGE_RATE	GET_EXCHANGE_RATE(date,fromISO,toISO)	Gets the exchange rate for the given currencies and date. The date variable in the formula can be either a mapped date field or a date function. For example: `GET_EXCHANGE_RATE([Day], 'USD', 'GBP')` where [Day] is a mapped date field. `GET_EXCHANGE_RATE(DATE('2021','8','17'),'USD','GBP')` where DATE('YYYY','MM','DD') is a date function. `GET_EXCHANGE_RATE(YESTERDAY(),'USD','GBP')` where `YESTERDAY()` is a date function.

Function Name	Syntax	Description
INDEXOF	INDEXOF(array, findText)	Searches the array for the specified item, and returns its position.
		Returns -1 if the item isn't found.
		If the item is present more than one time, the INDEXOF function returns the position of the first occurence.
		For example, INDEXOF(csv['row'], 'Campaign ID') == 0 returns true if 'Campaign ID' was found in the first cell.
		Note: The first item has position 0, the second item has position 1, and so on.
ISEMPTY	ISEMPTY(value)	Returns if the value is empty or not. For example, ISEMPTY('ab') returns false.
		ISEMPTY('') returns true.
LEFT	LEFT(text,numOfChars)	Returns the requested number of characters from the left. For example LEFT('abcde', 2) returns 'ab'.
LEN	LEN(text)	Returns the number of characters in the given text.
		For example LEN('abc') returns 3.
LOWER	LOWER(text)	Converts all uppercase letters in a string to lowercase letters. For example,
		LOWER('AbC') returns 'abc'.
MATCH	MATCH(valueToMatch,array)	Searches for a specified item in an array of values and then returns a boolean result. For example, MATCH(1,{1,2,3}) returns true because the value '1' exists in the array.
PROPER	PROPER(text)	Capitalizes the first letter in a text string and any other letters in text that follow any character other than a letter. Converts all other letters to lowercase.
REPLACE	REPLACE(SourceStr,pattern, targetStr)	Replaces every match of a pattern (a regex expression) in sourceStr to targetStr. For example, REPLACE('All-The-Best', '-', ' ') returns 'All The Best'. REPLACE('Let It Be','\\s','-') returns 'Let-It-Be'.

Function Name	Syntax	Description
RIGHT	RIGHT(text,numOfChars)	Returns the requested number of characters from the right. For example, RIGHT('abcde', 2) returns 'de'.
SELECT	SELECT(sourceStr,pattern)	Selects the first match of the pattern (a regex expression) in the sourceStr. For example, SELECT('Hello B wow E Goodbye', 'B(.*?)E') returns 'B wow E'.
SEMTIMEN	SENTIMEN(text)	Extracts a positive, neutral, or negative sentiment from the given text.
SPLIT	SPLIT(text,delimiter)	Splits a text string into an array by using a delimiter character. It returns a zero-based, one-dimensional array holding the parts of the original text string. For example, SPLIT('a,b,c', ',') returns an array with three items.
SUBSTITUTE	SUBSTITUTE(text,oldText,newText)	Substitutes newText for oldText in a text string. Use SUBSTITUTE when you want to replace specific text in a text string.
SUBSTRING	SUBSTRING(text,beginIndex,endIndex)	Returns the substring of the text beginning at beginIndex (inclusive) and ending at endIndex (exclusive).
TRIM	TRIM(text)	Removes all spaces from the text except for single spaces between words. For example, TRIM('Hello World') returns 'Hello World'.
UPPER	UPPER(text)	Converts all lowercase letters in a text string to uppercase. For example, UPPER('abC') returns 'ABC'.
URL_DECODE	URL_DECODE(text)	Decodes an application/x-www-form-urlencoded string using a UTF-8 encoding scheme.
URL_ENCODE	URL_ENCODE(text)	Translates a text into an application/x-www-form-urlencoded format using a UTF-8 encoding scheme.
VALUE_FROM_JSON	VALUE_FROM_JSON(JSON string, key)	Returns the value for a given key in a JSON string. If the key doesn't exist or the JSON is empty, an empty string is returned.

Date Functions

Function Name	Syntax	Description
DATE	DATE(year,month)	Returns the first day of the given month in the given year.
DATE	DATE(year,month,day)	Returns the date representing the given arguments.
DATEADD	DATEADD(interval,number, date)	Returns the date after which a certain time/date interval has been added. The interval can be one of the following: 'yyyy' (year), 'q' (quarter), 'm' (month), 'd' (day), 'ww' (week), 'h' (hour), 'n' (minute), or 's' (second).
DATEDIFF	DATEDIFF(interval,startDate,endDate	Returns the number of time units specified by interval between the startDate and the endDate. The startDate and endDate arguments can be date objects or date strings in standard form. The interval can be one of the following: 'yyyy' (year), 'q' (quarter), 'm' (month), 'd' (day), 'ww' (week), 'h' (hour), 'n' (minute), 's' (second). For example, DATEDIFF('m', PARSEDATE('12/22/2021','MM/d/yyyy'), PARSEDATE('10/18/2021','MM/d/yyyy')) returns -2.
DAYPRECISION	DAYPRECISION(date)	Returns the given date with day precision,so hours, minutes, and seconds fields are all set to 0. For example, the date '12-Jun-2012 16:34' is converted to '12-Jun-2012 00:00'.
DAYSBETWEEN	DAYSBETWEEN(startDate,endDate)	Returns the number of days between the given startDate and endDate.The arguments can be date objects or date strings in standard form.
DAYSINMONTH	DAYSINMONTH(date)	Returns the number of days in a specified month.
NETWORKDAYS	NETWORKDAYS(startDate,endDate)	Returns the number of workdays between two dates, excluding weekends.The arguments can be date objects or date strings in standard form.
NOW	NOW()	Returns the current system date and time.
SETHOUR	SETHOUR(date,hour)	Returns the given date set with the given hours, with hour being a numeric value between 0 and 23.

Function Name	Syntax	Description
TODAY	TODAY()	Returns the current system date.
TOSECONDS	TOSECONDS(duration)	Returns the amount of seconds represented by the given duration string in the format HH:mm:ss/HH:mm:ss.SSS.
YESTERDAY	YESTERDAY()	Returns yesterday's system date.

Aggregation Functions

All aggregation functions look at a data range, as opposed to a single row. You can specify the data range you want the calculated measurement to consider by defining the set of rows that the function operates on, which is called a window function.

You can define a window function in two ways.

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- Use GroupByDims within your function, for example SUM([metric],[[groupByDims]])
- Use a syntax that lets you choose in which row the function begins to apply and where it stops, such as SUM(metric, first_index(), last_index())

If you don't define the window function, aggregation functions consider all the data included in the query.

Function Name	Syntax	Description
ACC	ACC(metric, [groupByDims], orderByDim, sortOrder)	Gives an accumulative sum of the metric grouped by the dimensions, ordered by the orderByDim with the given sortOrder ('ASC' or 'DESC'). For example, ACC('Clicks', ['Media Buy Key'], 'Day', 'ASC').
ACC	ACC(metric, orderByDim, sortOrder, first_index(), last_index())	Gives an accumulative sum of the metric ordered by the orderByDim with the given sortOrder ('ASC' or 'DESC'). The window is defined as an offset from the current row. Use first_index()+n and last_index()-n for the offsets from the first and last row in the partition. If the last two parameters are omitted, the entire partition is used.
ACC_SUM	ACC_SUM(metric)	Computes an accumulating sum for the given metric. Unlike ACC, this function does not require you to insert a sort order.
AVG	AVG(metric, [groupByDims])	Computes the average of the given metric grouped by the supplied dimensions.
AVG	AVG(metric, first_index(), last_index())	Computes the average of the given metric. The window is defined as an offset from the current row. Use first_index()+n and last_index()-n for offsets from the first and last row in the partition. If the last two

Function Name	Syntax	Description
		parameters are omitted, the entire partition is used.
CORREL	CORREL(metric1, metric2, [groupByDims])	Calculates the Pearson Product-Moment Correlation Coefficient for two sets of values. Set the appropriate precision when creating a calculated measurement using correlation.
CORREL	CORREL(metric1, metric2, first_index(), last_index())	Calculates the Pearson Product-Moment Correlation Coefficient for two sets of values. The window is defined as an offset from the current row. Use first_index()+n and last_index()-n for the offsets from the first and last row in the partition. If the last two parameters are omitted, the entire partition is used.
COUNT	COUNT(metric, [groupByDims])	Counts the number of rows (grouped by the supplied dimension list) in which the given metric exists.
COUNT	COUNT(metric, first_index(), last_index())	Counts the number of rows (grouped by the supplied dimension list) in which the given metric exists.The window is defined as offsets from the current row. Use first_index()+n and last_index()-n for offsets from the first or last row in the partition. If the last two parameters are omitted, the entire partition is used (optional).
COUNT	COUNTDISTINCT([dimensions], [groupByDims])	Returns the number of unique appearances of dimension value combinations within the supplied context dimensions. If no groupBy dimensions are supplied, the row context is used.
DENSE_RANK	DENSE_RANK([groupByDims], orderField, sortOrder)	Computes the dense rank grouped by the dimensions, ordered by the orderField with the given sortOrder ('ASC' or 'DESC'). If groupByDims is omitted, it is calculated over the entire range.
FIRST	FIRST(metric, [groupByDims])	Returns the first value (considering the results' date dimension) of the given metric, grouped by the supplied dimensions.
FIRST	FIRST(metric, first_index(), last_index())	Returns the first value (considering the results' date dimension). The window is defined as offsets from the current row. Use first_index()+n and last_index()-n for offsets from the first or last row in the partition. If

Function Name	Syntax	Description
		the last two parameters are omitted, the entire partition is used..
GROUPCONCAT	GROUPCONCAT(groupedDimension,keyDimension, separator)	Concats the values of groupedDimension by keyDimension, with the separator string between each two grouped values. If a value is repeated, it's not concated twice. For example, GROUPCONCAT({Media Buy Name}, {Campaign Name}, ',') results in all media buy names concated (with no repetitions) for each campaign.
LAST	LAST(metric, [groupByDims])	Returns the latest value (considering the results' date dimension) of the given metric, grouped by the supplied dimensions.
LAST	LAST(metric, first_index(), last_index())	Returns the latest value (considering the results date dimension). The window is defined as offsets from the current row. Use first_index()+n and last_index()-n for offsets from the first or last row in the partition. If the last two parameters are omitted, the entire partition is used (optional).
LIFETIME	LIFETIME(metric, [groupByDims])	Computes the lifetime aggregation of the given metric grouped by the supplied dimensions.
LIFETIME	LIFETIME(metric, first_index(), last_index())	Computes the lifetime aggregation of the given metric. The window is defined as offsets from the current row. Use first_index()+n and last_index()-n for offsets from the first or last row in the partition. If the last two parameters are omitted, the entire partition is used (optional).
MAX	MAX(metric, [groupByDims])	Computes the maximum of the given metric grouped by the supplied dimensions.
MAX	MAX(metric, first_index(), last_index())	Computes the maximum of the given metric. The window is defined as offsets from the current row. Use first_index()+n and last_index()-n for offsets from the first or last row in the partition. If the last two parameters are omitted, the entire partition is used (optional).
MEDIAN	MEDIAN(metric, [groupByDims])	Returns the median (the value lying at the midpoint of the frequency distribution of all the values) of a metric across all records. You

Function Name	Syntax	Description
		can use median only with numeric fields. Null values are ignored.
MEDIAN	MEDIAN(metric, first_index(), last_index())	The window is defined as offsets from the current row. Use first_index()+n and last_index()-n for offsets from the first or last row in the partition. If the last two parameters are omitted, the entire partition is used. (optional).
MIN	MIN(metric, [groupByDims])	Computes the minimum of the given metric grouped by the supplied dimensions.
MIN	MIN(metric, first_index(), last_index())	Computes the minimum of the given metric. The window is defined as offsets from the current row. Use first_index()+n and last_index()-n for offsets from the first or last row in the partition. If the last two parameters are omitted, the entire partition is used (optional).
PERCENTILE	PERCENTILE(metric, number, [groupByDims])	Returns the percentile value of the given metric corresponding to the specified number. The number must be between 0 and 1 (inclusive), for example, 0.66, and must be a numeric constant.
PERCENTILE	PERCENTILE(metric, number, first_index(), last_index())	Computes the percentile value of the given metric corresponding to the specified number. The number must be between 0 and 1 (inclusive), for example, 0.66, and must be a numeric constant. The window is defined as offsets from the current row. Use first_index()+n and last_index()-n for offsets from the first or last row in the partition. If the last two parameters are omitted, the entire partition is used (optional).
RANK	RANK([groupByDims], orderField, sortOrder)	Computes the rank grouped by the dimensions, ordered by the orderField with the given sortOrder ('ASC' or 'DESC'). If groupByDims is omitted, it is calculated over the entire range.
STDEV	STDEV(metric, [groupByDims])	Computes the standard deviation of the given metric grouped by the supplied dimensions.
STDEV	STDEV(metric, first_index(), last_index())	Computes the standard deviation of the given metric. The window is defined as

Function Name	Syntax	Description
		offsets from the current row. Use first_index()+n and last_index()-n for offsets from the first or last row in the partition. If the last two parameters are omitted, the entire partition is used (optional).
SUM	SUM(metric, [groupByDims])	Computes the sum of the given metric grouped by the supplied dimensions.
		For example, SUM('Clicks', ['Media Buy Key', 'Creative Key']) returns the sum of clicks per media buy key and creative key.
SUM	SUM(metric, first_index(), last_index())	Computes the sum of the given metric. The window is defined as offsets from the current row. Use first_index()+n and last_index()-n for offsets from the first or last row in the partition. If the last two parameters are omitted, the entire partition is used (optional).
TOTAL	TOTAL(metric, [groupByDims])	Computes the total of the metric grouped by the supplied dimensions, according to its defined aggregation function.
		For example, if a metric m has aggregation type MAX - TOTAL('m', [Dimensions]) == MAX('m', [Dimensions]).
VAR	VAR(metric, [groupByDims])	Computes the variance of the given metric grouped by the supplied dimensions.
VAR	VAR(metric, first_index(), last_index())	Computes the variance of the given metric. The window is defined as offsets from the current row. Use first_index()+n and last_index()-n for offsets from the first or last row in the partition. If the last two parameters are omitted, the entire partition is used.
first_index	first_index()	Returns the number of rows from the current row to the first row in the partition.
index	index()	Returns the index of the current row in the partition.
last_index	last_index()	Returns the number of rows from the current row to the last row in the partition.

Logical Functions

Function Name	Syntax	Description
AND	AND(condition1, condition2)	Logical AND, checks to see that both conditions are true.
IF	IF(condition,resultifTrue,resultifFalse)	Returns the second argument if the first argument is true, and the third argument if otherwise.
IFERROR	IFERROR(someExpression, number)	Returns the someExpression if it's a valid number. Otherwise, returns a number.
NOT	NOT(condition)	Logical NOT, reverses the logic of its argument: true becomes false and vice versa.
OR	OR(condition)	Logical OR, checks to see if either one of the conditions are true.

Type Conversion

Function Name	Syntax	Description
COMPRESS	COMPRESS(value1)	Compresses a string using gzip and returns it in base64.
DECODE_BASE64	DECODE_BASE64(value1)	Decodes a string from base64.
DOUBLE	DOUBLE(value1)	Converts a string to a double.
ENCODE_BASE64	ENCODE_BASE64(value1)	Encodes a string to base64.
FORMATDATE	FORMATDATE(date,pattern)	Returns the string representation of the given date according to the supplied pattern. For example, (Fri Dec 22 00:00:00 UTC 2021) returns 22-Dec-2021.
FORMATDATE_DEFAULT	FORMATDATE_DEFAULT(date)	Returns the default (yyyy-MM-dd HH:mm:ss.S) Marketing Cloud Intelligence string representation of the given date. For example, DATEADD('d',3,PARSEDATE('12/22/2021','MM/d/yyyy')) returns (Mon Dec 25 00:00:00 UTC 2021).
MD5	MD5(stringToHash)	Returns an MD5 hash of the given string.
NUMBER	NUMBER(value1)	Converts a string to a number.
PARSEDATE	PARSEDATE(dateString,pattern)	Returns the date object specified by the given dateString using the given pattern. For example,

Function Name	Syntax	Description
		PARSEDATE('12/22/2021','MM/d/yyyy') returnsFri Dec 22 00:00:00 UTC 2021.
SHA256	SHA256(stringToHash)	Returns a SHA256 hash of the given string.
STRIP_HTML	STRIP_HTML(value1)	Strips HTML from a string.
UNCOMPRESS	UNCOMPRESS(value1)	Uncompresses a base64 string using gzip.

Context Functions

Function Name	Syntax	Description
CONTEXT_DIMENSION_CONTAINS	CONTEXT_DIMENSIONS_CONTAIN(dimension)	Returns true if the given dimension is included in the query.
CONTEXT_DIMENSION_EQUALS	CONTEXT_DIMENSIONS_EQUALS(dimension)	Returns true if the given dimensions are exactly the context dimensions. Enter all relevant dimensions, but the order isn't important.
FilterEndDate	FilterEndDate()	Returns the end date of the query filter.
FilterStartDate	FilterStartDate()	Returns the start date of the query filter.
GET_ENV	GET_ENV(variableName)	Returns the value for the given environment variable. Possible values are: WORKSPACE_ID.
QUERY_DIMENSIONS_CONTAIN	QUERY_DIMENSIONS_CONTAIN(dimension)	Returns true if the given dimension is one of the query dimensions.
QUERY_DIMENSIONS_EQUAL	QUERY_DIMENSIONS_EQUAL([dimensions])	Returns true if the given dimensions are exactly the query dimensions. Enter all the relevant dimensions, but the order isn't important.

Calculated Measurements Use Cases

Use these examples when creating calculated measurements to easily create fields. Each example contains an explanation with a code sample.

Note: Calculated measurements can be used in pivot tables, reports, and dashboards, but not in queries.

Tips:

- For Equals use '=='
- For Or use '||'
- For And use '&&'

- For "not" use '!' (expression)

Calculate Your Own Rate

You want to calculate the key performance indicators (KPIs) in Intelligence Reports for Engagement using a different formula. For example, the Email Open Rate is calculated by dividing the Unique Email Opens by the Email Deliveries. With calculated measurements, create another version of the Email Open Rate that uses the Email Sends as the denominator instead of the Email Deliveries.

Formula

```
IFERROR(someExpression, number)
```

Description

Returns someExpression if it's a valid number, otherwise it returns a number.

Example

To create Email Open Rate:

```
IFERROR([Email_Unique_Opens]/[Email_Sends], 0)
```

Original Data Set

Campaign	Email Send	Email Unique Opens
Welcome	50	35
Birthday	65	10
Promotion	70	55

Results with Calculated Measurement

Campaign	Open Rate (Calculated)
Welcome	70%
Birthday	15%
Promotion	78%

Calculate Filtered Metrics

Create a measurement that's filtered based on a condition. For example, create a dedicated measurement for clicks from each device for Mobile clicks, and Web clicks.

Formula

```
IF(condition,resultIfTrue,resultIfFalse)
```

Description

Returns the second argument, if the first argument is true, and the third argument if otherwise.

Formula

```
LOWER(text)
```

Description

Converts all uppercase letters in a text string to lowercase.

Examples

```
Desktop clicks metric: IF(Lower([Email_Device_Type])== desktop,[Email_Unique_Clicks],0)
```

```
Mobile clicks metric: IF(Lower([Email_Device_Type]) == 'mobile',[Email_Unique_Clicks],0)
```

Original Data Set

Campaign	Email Device Type	Email Unique Clicks
Welcome	Mobile	40
Welcome	Desktop	55
Birthday	Desktop	35
Birthday	Desktop	70
Birthday	Mobile	30

Results with Calculated Measurement

Campaign	Mobile Clicks	Desktop Clicks
Welcome	40	55
Birthday	30	105

Calculate a Share Metric

You want to calculate the share of unique clicks by any dimension. For example, the share of unique clicks by Email Link Alias.

Formula

SUM(metric, [groupByDims])

Description

Computes the sum of the given metric grouped by the supplied dimensions (optional).

Example

To calculate the share of email unique clicks

```
[Email_Unique_Clicks]/SUM([Email_Unique_Clicks])
```

You can then use this metric alongside any relevant dimension, and get the share of the metric according to that dimension.

Original Data Set

Email Link Alias	Email Unique Clicks
Header	30
Fill in form	50
Go to site	25

Results with Calculated Measurement

Email Link Alias	Share of Clicks (Calculated)
Header	28%
Fill in form	47%
Go to site	23%

Count Distinct Use Case

You want to count the number of unique Email Content Names.

Formula

COUNTDISTINCT([dimensions], [groupByDims])

Description

Returns the number of unique appearances of dimension value combinations, within the supplied context dimensions. If no groupBy dimensions are supplied, the row context is used by default.

Example

```
COUNTDISTINCT([Email_Content_Name])+[Email_Sends]-[Email_Sends]
```

Original Data Set

Campaign	Email Content Name
Welcome	A_Welcome_AMER
Welcome	A_Welcome_EMEA
Birthday	A_Birthday_EMEA
Birthday	B_Birthday_AMER
Birthday	B_Birthday_APAC

Results with Calculated Measurement

Campaign	Unique Email Content Names (Calculated)
Welcome	2
Birthday	3

Find and Replace Calculated Measurements

You can use the find and replace function to search for a specific measurement. Then, you can edit and replace the edited measurement across your entire business unit without finding every location where the calculated measurement is used. This feature is especially useful when creating a calculated measurement that is meant to replace an existing measurement across your business unit.

1. From Analytics Builder, select **Intelligence [Datorama] Reports**.
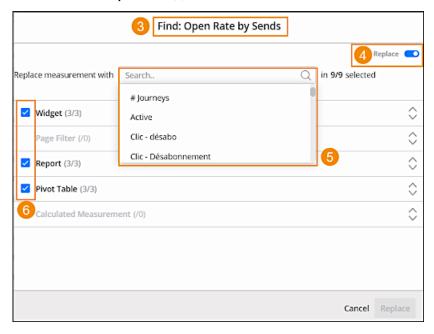
2. Select the **Setup** tab.

3. Expand **Calculated Measurement** (1), and then select a calculated measurement from the table.

4. Click the **Find and Replace** icon (2).

5. In the **Find & Replace** window (3), you can see where the selected calculated measurement is used across your business unit. For example, widgets, reports, or pivot tables.

6. Toggle on the **Replace** feature (4).

7. From the dropdown, select the measurement that you want to replace the current calculated measurement with (5).

8. You can uncheck any location that you don't want to replace. For example, uncheck a specific widget or report (6).

9. Click **Replace**.

Data Extensions

Query your engagement data with data extension data to retrieve additional attributes and measurements. Identify trends and get marketing insights based on performance by audience attributes from your data extensions.

For example, if you're interested in the number of opens and clicks based on the user's geolocation, connect to a data extension that holds your subscriber geolocation data. You can then see where your users are engaging with your data.

Connect to a Data Extension

Connect to a data extension to pull in additional attributes along with your engagement data. You can connect to any data extension that's in your business unit and is below 50 million rows.

Create a Join Between Engagement and Data Extension Data

While connecting to a data extension, you can create a connection between the data extension and engagement data. This way when querying, you're pulling in data from both datasets.

Manage Data Extensions

All connected data extensions appear in the Setup tab. From here you can view more information about each data extension. If errors occur during the sync, they appear here. You can also disconnect a data extension if you no longer require it, and edit joined fields too.

Troubleshoot Data Extension Failures

During the data extension sync process, different statuses appear. If for some reason the process fails, troubleshoot according to these guidelines.

Connect to a Data Extension

Connect to a data extension to pull in additional attributes along with your engagement data. You can connect to any data extension that's in your business unit and is below 50 million rows.

> 📝 **Note:**
> - SendLog and synchronized data extensions aren't supported.
> - Make sure your data extension doesn't contain these columns: date_id, location_id, dat_account_currency, dat_exchange_rate, pacing_period, pacing_end_date, row_count, or brand_id.
> - Make sure the data extension doesn't use the same column name more than once.
> - You can connect to up to 30 data extensions.
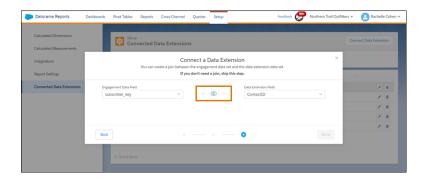
While connecting, create a join between engagement and data extension data to ensure the data appears correctly. After you connect to a data extension you can then create a query with the data extension's fields. For more information, see Queries on page 158

1. From Analytics Builder, select **Intelligence [Datorama] Reports**.

2. Select the **Setup** tab.

3. Expand **Connected Data Extensions**, and then click **Connect Data Extension**.

   All data extensions that exist in your business unit appear in folders, just like they're set up in Marketing Cloud Engagement.

4. Expand the folders until you reach the data extension you're connecting to.

> **Note:** You can only connect to data extensions that haven't been connected, if the data extension is already connected you can't move onto the next step.

5. Click **Next**.

6. Ensure that all fields are correct, and then click **Next**.

7. To create a join between your engagement data and data extension data, select the fields you want to connect.

> **Note:** This step is only necessary if you want to query your data extension data together with your engagement data using the Query Builder. For more information, see Create a Join Between Engagement and Data Extension Data on page 194.

8. Select the **Join** method you require.

By default, the platform queries data based on the Left Join method. Only matching data from the left table is returned when querying.

9. To return all rows that are found from both tables, even if no match is found, select **Full Join**.

10. Click **Done**.

11. After the data extension is connected, you can create a query with the fields from the data extension.

Create a Join Between Engagement and Data Extension Data

While connecting to a data extension, you can create a connection between the data extension and engagement data. This way when querying, you're pulling in data from both datasets.

This step is optional and is only necessary if you want to query your data extension data with your engagement data using the Query Builder. If you want to query your data extension as a standalone table without engagement data, then don't create a join.

There are two different types of joins

- **Left Join**—Returns all records from the left table, and the matched records from the right table. This is the default type.
- **Full Join**—Returns all records when there's a match in either the left or right table.

Use this example, which demonstrates subscriber data, to understand what happens when selecting each join type. You can perform the join on any field.

Engagement Data

Subscriber Key	Sends
abc123	1

Subscriber Key	Sends
def123	1
aaa222	1

Data Extension Data

ID	Region
abc123	EMEA
def123	AMER
123456	AMER
aaa222	EMEA

Since the values are stored in different fields in the data extension and in the engagement data, you must ensure that the fields are connected. If subscriber data is represented as the subscriber key in your engagement data, and as contact ID in the data extension data, connect the fields like this:

By default, the system performs a left join. If you run the query, you get these results based on the type of join you select.

Left Join Results

ID	Region	Sends
abc123	EMEA	1
def123	AMER	1
aaa222	EMEA	1

Full Join Results

ID	Region	Sends
abc123	EMEA	1
def123	AMER	1
aaa222	EMEA	1
123456	AMER	NULL

Manage Data Extensions

All connected data extensions appear in the Setup tab. From here you can view more information about each data extension. If errors occur during the sync, they appear here. You can also disconnect a data extension if you no longer require it, and edit joined fields too.

1. From Analytics Builder, select **Intelligence [Datorama] Reports**.

2. Select the **Setup** tab and then expand **Connected Data Extensions**.

3. View the different statuses. If a data extension fails, explore why. For more information, see Troubleshoot Data Extension Failures on page 196.

4. To disconnect a connected data extension, click **Delete**.

   > Note: After you disconnect a data extension, you can't query any of the related fields in the Query tab.

5. To edit the connected fields, click **Edit**. For more information, see Create a Join Between Engagement and Data Extension Data on page 194.

Troubleshoot Data Extension Failures

During the data extension sync process, different statuses appear. If for some reason the process fails, troubleshoot according to these guidelines.

> Note: It's recommended to not modify data extensions after they're connected to avoid sync failures.

- **Pending**—The data extension is connecting. It can take up to 24 hours to populate data.
- **Complete**—The data extension is connected. Data is synced once a day.
- **Failed**—The data extension failed to sync. Here are some possible reasons:
    - A field was renamed or deleted from the data extension. Disconnect the data extension and then contact Salesforce Customer Support.
    - There were invalid column names in your data extension.
    - The data extension contained one of these column names: date_id, location_id, dat_account_currency, dat_exchange_rate, pacing_period, pacing_end_date, or row_count.
    - The data extension contained the same column name more than once.

      > Note: Data extensions aren't case sensitive. For example: campaign name = campaign_name

    - A technical error occurred. It's recommended to wait 24 hours.
    - If for some reason the connection to the data extension failed, try deleting the automation of the data extension in Automation Studio.

Differences Between Intelligence Reports and Other Reports

When using other Marketing Cloud Engagement reporting tools, such as Data Views, the results you see can vary depending on the type of report and its purpose.

If the results you're seeing don't match, the logic behind the reports and structure is different. This section compares Intelligence Reports to other Marketing Cloud Engagement reports so you can understand and analyze your results accurately.

When using Intelligence Reports and Data Views, you might encounter discrepancies because the logic behind the reports and structure is different. Review the differences so that you can better understand your results.

Intelligence Reports Versus Data Views

When using Intelligence Reports and Data Views, you might encounter discrepancies because the logic behind the reports and structure is different. Review the differences so that you can better understand your results.

Table 12: Intelligence Reports Versus Data Views

	Intelligence Reports	**Data Views**
Date range	The last date is included in Intelligence Reports dashboards. For example, for the date range January 1–January 31, January 31 is included.	The last date of the date range might not be included, depending on the query. For example, EventDate < 1/31 compared to EventDate <= 1/31.
Filtering	Test Sends are filtered out of Email OOB dashboards. Suppress from Send Reports are filtered out of all dashboards, pivot tables, and reports.	Deleted contacts are filtered out of Data Views.
Time zone	The parent business unit's time zone is used.	The system time zone (Central Standard Timezone) is used.
Historical data	Kept up to 2 years.	Only the past 6 months is kept.

Set Up Intelligence Reports on Hyperforce

Using Hyperforce requires a new connection between Data Cloud and Marketing Cloud Engagement. Intelligence Reports provisioned for Marketing Cloud Engagement is hosted on a Salesforce-managed Hyperforce infrastructure in the applicable region. Intelligence Reports on Hyperforce use data service credits on Data Cloud.

When you use Intelligence Reports on Hyperforce, your engagement data is stored and processed in Data Cloud. Using Data Cloud features for Intelligence Reports has billing implications. For more information, see Billing for Intelligence Reports on Hyperforce.

Setting up Intelligence Reports on Hyperforce involves these high-level steps.

1. Open a ticket with Salesforce and request Intelligence Reports on Hyperforce.

   🛑 **Important:** Wait for the support ticket to be resolved before connecting Data Cloud to Marketing Cloud Engagement.

2. After Salesforce support has marked the support ticket as resolved, set up a Marketing Cloud Connection in Data Cloud. For more information, see Set Up a Marketing Cloud Engagement Connection in Data Cloud.

   📝 **Note:** If you already have a connection to Marketing Cloud Engagement, delete it, and create a new connection.

3. Install the Email Studio and MobilePush data bundles for the new connection. When setting up the data bundles, select all your existing business units. For more information, see Marketing Cloud Engagement Starter Data Bundles in Data Cloud.

- Intelligence Reports on Hyperforce supports only the Email Studio & MobilePush bundle.
- If you don't use Mobile Push in Marketing Cloud Engagement, you don't need to deploy the Mobile Push data streams.
- If you add new business units to Marketing Cloud in the future, return to this step and add them so that they can be included in your Intelligence Reports.
- Data provisioning can take up to 24 hours from the time the bundles are configured.

4. Access Intelligence Reports by logging in to Marketing Cloud Engagement with an Intelligence Reports for Engagement user role. For more information, see User Roles and Permissions in Intelligence Reports.

Billing Considerations for Intelligence Reports on Hyperforce

When you use Intelligence Reports on Hyperforce, your engagement data is stored and processed in Data Cloud. Using Data Cloud features for Intelligence Reports has billing implications.

SEE ALSO:

Access Intelligence Reports

Billing Considerations for Intelligence Reports on Hyperforce

When you use Intelligence Reports on Hyperforce, your engagement data is stored and processed in Data Cloud. Using Data Cloud features for Intelligence Reports has billing implications.

Data Cloud services and usage impacts the consumption of credits used for billing. Enabling Intelligence Reports creates data streams to import data from all Marketing Cloud Engagement business units into Data Cloud, even if only a subset of business units are selected for Data Cloud integration. For more information about usage types, see Data Cloud Usage Types.

category	Description
Batch Data Pipeline	- Data Streams--Usage is calculated based on the amount of batch data processed by Data Cloud data streams across all connectors. - Data Transforms--Usage is calculated based on the higher of the number of rows read or number of rows written.
Data Queries	Usage is calculated based on the number of records processed. The count of records processed depends on the structure of a query as well as other related factors such as the total number of records in the objects being queried.
Streaming Data Pipeline	Usage is calculated based on the number of records ingested by data streams with stream processing and the number of records processed by streaming data transforms. Data streams with stream processing include web, mobile, and streaming ingestion API.
Storage Beyond Allocation	Usage is calculated based on the amount of storage used above the amount allocated.

For more information on how Data Cloud usage is billed, refer to your contract or contact your account executive.

Google Analytics Integration for Marketing Cloud Engagement

To use Google Analytics capabilities to track and analyze journey activity, integrate Google Analytics with Marketing Cloud Engagement. You can also view the resulting metrics directly in Marketing Cloud Engagement. Google's native authentication creates a secure link between your Marketing Cloud Engagement instance and your Google Analytics account.

To use this integration, your Marketing Cloud Engagement account must have the Google Analytics Audiences SKU. You must also have at least a Marketing Cloud Engagement Enterprise 2.0 account. For more information about these requirements, contact your Salesforce account representative.

This integration supports Google Analytics 4 properties. It supports both the free version and the paid Google Analytics 360 enterprise version.

You can revoke the integration from a Google Analytics account. For the integration, Google recommends that you designate a primary company account to track all your properties and views. For more information, see the Google Hierarchy of organizations, accounts, users, properties, and views.

Before you configure the Google Analytics Integration for Marketing Cloud Engagement:

- Confirm that you have admin permissions for Marketing Cloud Engagement and the Google Analytics account and property.
- Create a Google Analytics tracking code, and add the code to your website's pages.
- If you want to receive conversion data, enable ecommerce in your Google Analytics account. Ecommerce is available only in a paid Google Analytics 360 account.

Google Analytics Integration for Marketing Cloud Engagement

The Google Analytics integration for Marketing Cloud Engagement uses Google Analytics 4 (GA4), which offers free and paid versions. You can use either version with Marketing Cloud Engagement.

Integrate Google Analytics with Marketing Cloud Engagement

Set up the integration between Marketing Cloud Engagement and your Google Analytics account.

Google Analytics Audiences

When you activate a Google Analytics audience in Marketing Cloud Engagement, a persistent user ID is created in both systems. With this user ID, you can collect data about customer behaviors and create Google Analytics audiences to use in Journey Builder.

Journey Analytics Metrics

Learn about the metrics and dashboard tiles available on the Journey Analytics dashboard with the Google Analytics 4 integration. View journey performance against the goals you set and email and site metrics all in one place. App and web conversion events appear in context with your journey's native metrics. To display the metrics that matter most to you, customize your dashboard's appearance.

Google Analytics Tracking

To get web and mobile app metrics in the Journey Analytics dashboard, set up Google Analytics 4 (GA4) tracking for app and web. You can analyze how mobile app conversions impact web behavior.

Google Analytics Integration FAQs

Review answers to frequently asked questions about the Google Analytics Integration for Marketing Cloud Engagement.

SEE ALSO:

Google Hierarchy of organizations, accounts, users, properties, and views

Google Hierarchy of organizations, accounts, users, properties, and views

About data sampling

Journey Analytics Dashboard

Google Analytics Integration for Marketing Cloud Engagement

The Google Analytics integration for Marketing Cloud Engagement uses Google Analytics 4 (GA4), which offers free and paid versions. You can use either version with Marketing Cloud Engagement.

The free version of GA4 gives you access to sampled data reporting about your customer interactions. The Engagement integration adheres to Google's analytics sampling rate. For more information, see Google Analytics Collection Limits and Quotas in the Google Analytics documentation.

Google's paid version of GA4, called Google Analytics 360, provides access to unsampled data and audiences so that your marketing team has up-to-the-moment insight into customer behaviors.

> ✏️ **Note:** Google discontinued the previous version of Google Analytics, called Universal Analytics (UA). If you previously used UA properties, you must re-create them in GA4 if you want to use them with Marketing Cloud Engagement. See *Google Analytics Help*: Make the switch to Google Analytics 4.
>
> After you re-create the properties, modify your journeys to remove UA entry sources and replace them with data extension entry sources that reference your GA4 properties.

Integrate Google Analytics with Marketing Cloud Engagement

Set up the integration between Marketing Cloud Engagement and your Google Analytics account.

Before you start, an admin must enable Journey Builder and the Google Analytics Integration.

For information about how Google uses data about your websites and customers, see Google's Privacy Policy. Google also provides advice for safeguarding your data.

1. Link Google Analytics and Marketing Cloud Engagement Accounts

   Connect your Marketing Cloud Engagement account to Google Analytics. Google's native authentication process creates a secure connection between your accounts and sets view permissions for your reports. If you have multiple Engagement instances under the same EID, the Google Analytics accounts that you link are added to those instances also.

2. [Setting Up Parameters](#)

UTM parameters help you measure how clicks from your messages relate to activities on your websites. After you set up these parameters, Marketing Cloud Engagement appends them to the URLs in your messages.

SEE ALSO:

[Consent Management for Marketing Cloud](#)

[Data Deletion for Marketing Cloud](#)

[Data Access and Export for Marketing Cloud](#)

[Restrict Data Processing for Marketing Cloud](#)

Link Google Analytics and Marketing Cloud Engagement Accounts

Connect your Marketing Cloud Engagement account to Google Analytics. Google's native authentication process creates a secure connection between your accounts and sets view permissions for your reports. If you have multiple Engagement instances under the same EID, the Google Analytics accounts that you link are added to those instances also.

This feature requires Journey Builder and the Google Analytics integration to be active in your account. Contact your account executive for more information.

We recommend that you create a dedicated admin user account to set up the connection.

1. From Engagement Setup, expand the Apps section, and then click **Google Analytics Integration**.

2. Click **Link Account**.

3. Select or enter the name of the Google Analytics account, and click **Next**.

4. Enter your password and click **Next**.

5. To accept Google's request to access Engagement, click **Allow**.

To disconnect the account, repeat these steps and click **Unlink Account**.

Setting Up Parameters

UTM parameters help you measure how clicks from your messages relate to activities on your websites. After you set up these parameters, Marketing Cloud Engagement appends them to the URLs in your messages.

Channel Support

Links in your email messages include all the parameters that you set up in Parameter Manager, unless link tracking is disabled for the email address. In SMS activities, the Campaign Term, Campaign Content, and Subscriber ID parameters aren't tracked.

👁 **Example:** URLs that include UTM parameters resemble this example.

https://www.to.com?utm_source=sfmc&utm_medium=email&utm_campaign=TestCampaign&utm_term=MyLink123&utm_content=12345&utm_id=5170e-d6e-48e-973-84a6225&sfmc_id=2568&sfmc_activityid=587458

Parameter Information

This table lists the UTM parameters that Engagement can pass to Google Analytics.

Parameter Key	Parameter Name	Description
`utm_source`	Campaign Source	Use this configurable parameter to track the source of web activity.

Parameter Key	Parameter Name	Description
utm_medium	Campaign Medium	This configurable parameter tracks which channels, such as email or SMS, drive the web activity.
utm_campaign	Campaign Name	Use this configurable parameter to identify a product promotion or strategic campaign. There are two options. • Set per Message—Enter a custom campaign name for each email activity in the Journey Builder Email Send Flow. • Message Name—The campaign name inherits the name of the email sent.
utm_term	Campaign Term	This required nonconfigurable parameter analyzes individual links within messages. This parameter is populated with link alias text associated with the content asset.
utm_content	Campaign Content	This required nonconfigurable parameter tracks the effectiveness of an Engagement content asset. This parameter is populated with the content asset ID.
utm_id	Campaign ID	This required nonconfigurable parameter links activity within an Engagement journey and is populated with the journey ID. Engagement generates this parameter to link activity in Journey Builder.
sfmc_id	Subscriber ID	This nonconfigurable parameter is required to create persistent user IDs between Engagement and Google Analytics.
sfmc_activityid	Activity ID	This required nonconfigurable parameter is appended to every link in a journey for supported channels. When a subscriber clicks a link, Engagement passes this parameter to Google Analytics. The associated Google Analytics behavioral metrics are then reported for the specific activity in a journey.

For more information about the UTM parameters that Google Analytics supports, see Collect campaign data with custom URLs in the Google Analytics documentation.

Associate your subscribers with Google Analytics 4 audiences with UTM parameters. Marketing Cloud Engagement automatically applies these parameters to the links in your messages.

SEE ALSO:

Collect campaign data with custom URLs (Google Analytics documentation)

Configure Google Analytics Tracking Parameters in Marketing Cloud Engagement

Associate your subscribers with Google Analytics 4 audiences with UTM parameters. Marketing Cloud Engagement automatically applies these parameters to the links in your messages.

For security purposes, recipients can't see the sfmc_journey_name and the sfmc_activity_name values for journeys and activities in the URL. You can view the names in their original format in Google Analytics. To ensure that this functionality works as intended, you must use the Parameter Manager to set these values.

1. In Setup, under Data Management, click **Parameter Management**.

2. To view the parameters, expand a section.

3. Next to the string that you want to change, click **Edit**.

4. In **GA4 Property Tracking**, enable or disable the feature and save it.
   When enabled, Marketing Cloud Engagement adds the parameters to each message sent from this business unit.

   📝 **Note:** If you have UA Property Tracking enabled and disable it, you can't re-enable it. Use GA4 Property Tracking instead.

Google Analytics Audiences

When you activate a Google Analytics audience in Marketing Cloud Engagement, a persistent user ID is created in both systems. With this user ID, you can collect data about customer behaviors and create Google Analytics audiences to use in Journey Builder.

When you synchronize an audience, Engagement creates a data extension that you can use as journey entry criteria. The data extension's name is the audience name plus the property ID.

Because a data extension name supports only alphanumeric characters, the integration replaces prohibited characters in an audience name with dashes. For example, if you have an audience called "[North America] 5 Purchases > $50" with the property ID 123456789, the integration creates a data extension called "-North America-5 Purchases - -50_123456789".

A data extension contains this information.

- SubscriberKey—The unique key of the subscriber.
- SubscriberId—The unique ID of the subscriber.
- AllowPersonalizedAds—Specifies whether users have consented to allow the publisher to share personal information with Google for personalized advertising purposes.

EDITIONS
Available in: Marketing Cloud Engagement Enterprise 2.0

Create a Google Analytics Audience
To segment your Marketing Cloud Engagement contacts based on dimensions, metrics, and events, create an audience in Google Analytics.

Track a Google Analytics Audience

To use a Google Analytics audience as an entry source in Journey Builder, create the audience in Google Analytics, and then add it to the Marketing Cloud Engagement integration. When you connect an audience to Engagement, it synchronizes the audience automatically or according to a schedule that you set.

Share an Audience with Another Business Unit

When you link Marketing Cloud Engagement with Google Analytics 4, the GA4 audiences are available to every business unit that has the same enterprise ID (EID). You can choose which business units are able to access these audiences.

Use an Audience Data Extension in a Journey Entry Step

When you import a Google Analytics audience, Marketing Cloud Engagement creates a data extension based on the data associated with the audience. You can use the data extension to add an audience into a journey.

SEE ALSO:

The Google Analytics 360 Entry Source

GA360 Use Case

Contact Builder Data Sources

Synchronized Data Sources in Contact Builder

Create a Google Analytics Audience

To segment your Marketing Cloud Engagement contacts based on dimensions, metrics, and events, create an audience in Google Analytics.

1. Link Marketing Cloud Engagement to your Google Analytics account. See Link Google Analytics and Marketing Cloud Engagement Accounts on page 201.

2. Create a Google Analytics 4 (GA4) audience. See *Google Analytics Help*: Create, edit, and archive audiences.

   📝 Note: If you have an existing Universal Analytics (UA) audience that you want to use with Marketing Cloud Engagement, re-create it as a GA4 audience. See *Google Analytics Help*: Recreate Universal Analytics audiences.

SEE ALSO:

The Google Analytics 360 Entry Source

Contact Builder Data Sources

Synchronized Data Sources in Contact Builder

Suggested Audiences

Track a Google Analytics Audience

To use a Google Analytics audience as an entry source in Journey Builder, create the audience in Google Analytics, and then add it to the Marketing Cloud Engagement integration. When you connect an audience to Engagement, it synchronizes the audience automatically or according to a schedule that you set.

Before you start, set up Engagement in your Google Analytics property by completing the Salesforce Marketing Cloud Engagement audience integration.

Build your properties and audiences on the Google Analytics 4 (GA4) platform. Google provides tools for migrating legacy properties and audiences to GA4.

1. From Engagement Setup, select **Apps**, and then select **Google Analytics Integration**.

2. Under GA4 Audiences, click **Add Audiences**.

3. Select the Google Analytics account that contains the audience that you want to track.

4. In the list of properties, select the audiences that you want to track.

5. Save your work.

The sync schedule begins 10 minutes after you select an audience and then runs daily at the same time. If you select more audiences later, syncing follows the same schedule. After the initial sync, the Google Analytics integration starts collecting metrics for the audiences that you selected.

Share an Audience with Another Business Unit

When you link Marketing Cloud Engagement with Google Analytics 4, the GA4 audiences are available to every business unit that has the same enterprise ID (EID). You can choose which business units are able to access these audiences.

1. From Contact Builder, go to the Data Sources tab.

2. On the Google Analytics 4 Audiences tile, click **View**.

3. To enable sharing with other business units, turn on sharing for the audience that you want to share.

4. Click **Shared**.

5. To share an audience, select the business units to share with.

6. Click **Done**.

Use an Audience Data Extension in a Journey Entry Step

When you import a Google Analytics audience, Marketing Cloud Engagement creates a data extension based on the data associated with the audience. You can use the data extension to add an audience into a journey.

> **EDITIONS**
>
> Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud Engagement and the Google Analytics Integration

1. In Journey Builder, drag a Data Extension entry source onto the canvas.

2. Click the Data Extension step, and then select **Select Data Extension** > **Shared Data Extensions** > **GA4 Audiences**.

3. Select the ID of the Google Analytics property that contains the audience that you want to use.

4. Choose the audience that you want to add to the journey, and then click **Summary**.

5. Review your selection, and then click **Done**.

SEE ALSO:

Configure the Data Extension Entry Source

Journey Analytics Metrics

Learn about the metrics and dashboard tiles available on the Journey Analytics dashboard with the Google Analytics 4 integration. View journey performance against the goals you set and email and site metrics all in one place. App and web conversion events appear in context with your journey's native metrics. To display the metrics that matter most to you, customize your dashboard's appearance.

To learn how to enable Google Analytics 4 tracking for a journey, see Enable Google Analytics 4.

Journey Analytics Dashboard

Access unified cross-channel performance data in Journey Builder, and easily track your marketing campaign's effectiveness. Journey Analytics, powered by Google Analytics, unites Marketing Cloud Engagement SMS, push messaging, and email capabilities with Analytics behavioral data in a single dashboard. You can compare how goals configured in Google Analytics perform over time, and you can see ecommerce, messaging performance, and site usage data.

Google Analytics Goals Tile

Google Analytics goal metrics are aggregated at the journey level in the Journey Analytics dashboard. Goal data provides insight into how the journey contributes to the overall success of your marketing strategy. Get information about completed activities, such as purchases and user engagement for website traffic generated by Marketing Cloud Engagement activities. Configure the dashboard to display up to five goals.

Google Analytics Delivery and Engagement Tiles

View Google Analytics email, SMS, and push message performance metrics in the Journey Builder Analytics dashboard. Monitor how email, SMS, and push message interactions drive the online behavior of subscribers through live metrics. Metrics can include page views, bounce rate, goal completion, conversion rate, and average order value.

Google Analytics Conversions and Revenue Tiles

View Google Analytics ecommerce metrics in the Journey Builder Analytics dashboard in Marketing Cloud Engagement.

Google Analytics Traffic Tile

Gain insights that help you evaluate the impact of your marketing communications strategy. View Google Analytics site usage metrics on the Journey Builder Analytics dashboard in Marketing Cloud Engagement.

Google Analytics Engagement and Views Tiles

Find out which marketing content is reaching your customers. Monitor the engagement that your messages are driving by checking out Google Analytics views and engagement data on the Journey Analytics dashboard.

SEE ALSO:

Journey Analytics Dashboard

Journey Analytics Dashboard

Access unified cross-channel performance data in Journey Builder, and easily track your marketing campaign's effectiveness. Journey Analytics, powered by Google Analytics, unites Marketing Cloud Engagement SMS, push messaging, and email capabilities with Analytics behavioral data in a single dashboard. You can compare how goals configured in Google Analytics perform over time, and you can see ecommerce, messaging performance, and site usage data.

Track your marketing campaign's effectiveness across views in your account for the date range you select. View and compare how goals configured in Google Analytics perform, and compare data over different periods.

To use Google Analytics in a journey, link your Salesforce and Google Analytics accounts, and follow Google's login process.

Considerations

- Any user in your account can access the Journey Analytics dashboard in a journey.
- When Google Analytics is enabled for your account, tracking is available by default in all journeys.
- When you create another version of a journey, it includes tracking even if Google Analytics was disabled when the journey was created.
- The Journey Analytics data shown on the dashboard pertains to all versions of the journey and isn't separated by journey version.
- The delivery rate is calculated by subtracting bounces from the number of total sends, and then dividing the total sends by that number. When there are no bounces, the delivery rate is 100%.

The Goals component in Journey Analytics isn't linked or related to Journey Builder goals or exit criteria. For more information on goals, see Google Analytics help.

Google Analytics Goals Tile

Google Analytics goal metrics are aggregated at the journey level in the Journey Analytics dashboard. Goal data provides insight into how the journey contributes to the overall success of your marketing strategy. Get information about completed activities, such as purchases and user engagement for website traffic generated by Marketing Cloud Engagement activities. Configure the dashboard to display up to five goals.

For more information about using Goals with Universal Analytics, visit About goals. For help with migrating to GA4 Goals, learn about the Goals migration tool.

Google Analytics Delivery and Engagement Tiles

View Google Analytics email, SMS, and push message performance metrics in the Journey Builder Analytics dashboard. Monitor how email, SMS, and push message interactions drive the online behavior of subscribers through live metrics. Metrics can include page views, bounce rate, goal completion, conversion rate, and average order value.

Common Metrics

Delivery Rate
The number of sends minus the number of bounces divided by the total number of sends.

Total Sent
The number of times a message was sent.

Email Metrics

Total Opens
The number of times subscribers open an email. This value excludes the number of subscribers who open the email and then click a link in it.

Unique Opens
The number of times distinct users open an email.

Total Clicks
The number of times a link in an email was clicked.

Unique Clicks
The number of times distinct users click a link in an email.

SMS Metrics

Undelivered
The number of sends minus the number of delivered messages.

Total Clicks
The number of times a link in an SMS message was clicked.

Push Metrics

Direct Opens
    The number of times a user opens the app or website by tapping a push message.

Google Analytics Conversions and Revenue Tiles

View Google Analytics ecommerce metrics in the Journey Builder Analytics dashboard in Marketing Cloud Engagement.

Analyze the impact of Engagement email and journey activities on customer conversion rates. Metrics include revenue, transactions, average order value, and ecommerce conversion rate. For more information, visit About Ecommerce.

Google Analytics Traffic Tile

Gain insights that help you evaluate the impact of your marketing communications strategy. View Google Analytics site usage metrics on the Journey Builder Analytics dashboard in Marketing Cloud Engagement.

View behavioral data for subscribers who visit your site through a link in an Engagement email, SMS, or push message. See how many subscribers stayed and browsed your site, the number of pages they viewed, and how many subscribers abandoned browsing immediately.

Google Analytics Engagement and Views Tiles

Find out which marketing content is reaching your customers. Monitor the engagement that your messages are driving by checking out Google Analytics views and engagement data on the Journey Analytics dashboard.

Use the Page or Screen Views tile on the Journey Analytics dashboard to see your most-visited web pages or screens.

Use the Engagement tile to visualize your customers' engagement with email, SMS, and push messaging in a single chart

You can also compare the rate of change between time periods.

Google Analytics Tracking

To get web and mobile app metrics in the Journey Analytics dashboard, set up Google Analytics 4 (GA4) tracking for app and web. You can analyze how mobile app conversions impact web behavior.

The GA4 property type can track your users' online and mobile behavior.

In contrast to previous Google Analytics integrations, Marketing Cloud Engagement Setup now includes a Web URL Tracking and an App Event Tracking string.

Marketing Cloud Engagement customers who use Journey Builder can integrate it with GA4. When you set up app event and web event tracking, conversion events appear in the dashboard with other journey metrics.

Configure Google Analytics App Tracking
    To track engagement with mobile URLs, set up Google Analytics 4 (GA4) property tracking for your Marketing Cloud Engagement business unit.

Configure Google Analytics Web Tracking
    To track the URLs used in Journey Builder emails and SMS activities in Marketing Cloud Engagement, set up Google Analytics 4 (GA4) property tracking. Configure tracking parameters in Google Analytics first, and then enable them in Engagement Setup.

Deactivate a Tracking Parameter
    To stop tracking a Google Analytics parameter in Marketing Cloud Engagement, deactivate the parameter in Setup. Deactivation is immediate, and future sends aren't tracked.

Configure Google Analytics App Tracking

To track engagement with mobile URLs, set up Google Analytics 4 (GA4) property tracking for your Marketing Cloud Engagement business unit.

Before you can set up tracking for supported mobile apps, ask your developer to configure the Firebase SDK, which supports logging custom campaign details to GA4.

1. From Engagement Setup, go to Data Management, and then click **Parameter Management**.

2. Click **GA4 Property Tracking**.

3. On the App tab, turn on tracking parameters.

   You can't configure the tracking parameters.

4. Save your changes.

Configure Google Analytics Web Tracking

To track the URLs used in Journey Builder emails and SMS activities in Marketing Cloud Engagement, set up Google Analytics 4 (GA4) property tracking. Configure tracking parameters in Google Analytics first, and then enable them in Engagement Setup.

1. From Engagement Setup, go to Data Management, and click **Parameter Management**.

2. Click **GA4 Property Tracking**.

3. On the Web tab, enable the tracking parameters.

4. Save the settings.

Deactivate a Tracking Parameter

To stop tracking a Google Analytics parameter in Marketing Cloud Engagement, deactivate the parameter in Setup. Deactivation is immediate, and future sends aren't tracked.

1. From Engagement Setup, go to Data Management and click **Parameter Management**.

2. Expand a string to view its parameters.

3. Click ▼ and deactivate the string.

Google Analytics Integration FAQs

Review answers to frequently asked questions about the Google Analytics Integration for Marketing Cloud Engagement.

What Level of Journey Data Is Displayed in the Journey Analytics Dashboard?
Data for all versions of the journey is aggregated by day and displayed in the dashboard.

Why Aren't All My Google Analytics Audiences Listed on the Setup Page?
To appear on the Setup page, an audience must be synced. Select all audiences for a property so that the integration can sync all of them.

Why Doesn't the Subscriber Count in the Audience Data Extension Match the Count in Google Analytics?
For audience members to appear in your data extension, they must have an `sfmc_id` attribute. To ensure that this attribute is passed from Marketing Cloud Engagement to Google Analytics, configure the `sfmc_id` parameter with a value of `%%subscriberid%%`.

Why Don't My Subscribers Appear in My Google Analytics Audience?

Marketing Cloud Engagement uses an ID to link subscribers to Google Analytics audience members. To ensure that this link is created, configure the `sfmc_id` parameter with a value of `%%subscriberid%%`.

What Limits Apply to My Use of Google Analytics?

Google enforces several limits on Google Analytics. A free Google Analytics account can contain up to 100 audiences, while a paid account can contain up to 400. Free accounts can retain audience data for up to 14 months, while a paid account can retain data for up to 50 months.

Why Can't I See All the Accounts, Properties, and Views in the Google Analytics View Dropdown Menu in the Journey Analytics Dashboard?

Only the accounts, properties, and views for which you're granted admin access appear in the Journey Analytics dashboard. To edit user permissions, follow the instructions to configure Google Analytics integration user permission.

I Purchased the Google Analytics Integration. Why Can't I See It?

Confirm that you have Marketing Cloud Engagement and Google Analytics administrator roles.

Is Google Analytics Data Stored in Marketing Cloud Engagement Data Extensions?

Yes. When you connect Google Analytics 4 properties, Marketing Cloud Engagement creates a data extension for each audience in the properties. Use that audience data extension to add contacts to a journey.

Journey Analytics Dashboard No Longer Shows Google Analytics Data

A Google Analytics account administrator can revoke the permission to share data with Marketing Cloud Engagement. When permission is revoked, the data no longer appears in the Engagement dashboard. Contact your Google Analytics account administrator to verify that the property is configured to share data with Engagement.

Why Can't I See My Google Analytics Information?

Administrator permissions are required to view the accounts, properties, and views associated with your Google account. If this information isn't appearing in the selector, check your permissions.

Does This Integration Comply with the Salesforce Privacy Policy?

Yes. When the Track Clicks feature is disabled for an email address, Marketing Cloud Engagement doesn't append the Google Analytics UTM parameters to links in the email.

Can I Determine Which Domains and Subdomains Are Tracked for Links Sent from My Journey?

Yes, you can allow one or more domains and subdomains using the allowlist in Journey Builder settings.

Can I Define My Own Campaign Name Parameter for Links in an Email?

Yes. To enter a custom campaign name for each email activity in the Journey Builder email send flow, select the Set Per Message option in the Google integrations tracking parameters.

What Happens If I Leave the Allowlist Domains Empty?

If no domains or subdomains are specified in the allowlist, the Google UTM tracking parameters are appended to all links.

Can I Use the Journey Analytics Dashboard Without the Google Analytics Integration?

Yes. All Marketing Cloud Engagement users have access to email metrics in the Journey Analytics dashboard.

What Is the Earliest Selectable Date for the Date Filter on the Journey Analytics Dashboard?

The earliest selectable date is the date that version 1 of the journey was created. For example, if version 1 of the journey was created more than 3 years before today's date, the earliest selectable date is 3 years before today.

How Far Back Can I Query My Google Analytics Data from the Journey Analytics Dashboard?

The Google Analytics integration provides data from the past 3 years. For example, if you create the first version of the journey three years and one month before today's date, the oldest data available is four years before today's date.

What Is the Largest Selectable Date Range in the Date Filter?

The system defaults to the maximum of 30 days. If the journey started less than 30 days ago, the date range automatically adjusts to a custom range to include the start date through today.

Can I Use Overlapping Date Ranges Using the Metric Compare Feature in the Date Filter?

No. Overlapping date ranges causes the system to count your data more than once and provides an inaccurate comparison of the data sets.

How Are Deltas Calculated for the Metrics Compare Feature in the Journey Analytics Dashboard?

To calculate the comparison metric value, the system subtracts the comparison date range metric value from the date range metric value.

Can I Match Contacts Between Google Analytics and Marketing Cloud Engagement?

Yes. To identify a customer in an audience by matching the Client ID stored on the client machine in the GA cookie and the SFMC ID, the user's machine must initiate a session. You need both IDs to simulate a session and send a hit through the Google Analytics measurement protocol. To encourage engagement, you can send the customer a welcome email with a call-to-action link or button when they complete their online registration.

Can I Add the SubscriberID Parameter to a Link in Journey Builder?

Yes. You can manually append the `sfmc_id=%%subscriberid%%` parameter to a link, just like other UTM parameters. When you do, the subscriber is added to an audience, published to Marketing Cloud Engagement, and added back into a journey using the data extension for the audience.

Can I Remove Duplicate IDs?

Yes. In Google Analytics, you can expose the subscriber ID from Marketing Cloud Engagement as a custom dimension. If multiple Google Client IDs have the same subscriber ID, the integration deduplicates the Google ID before it's sent to Marketing Cloud Engagement.

What Level of Journey Data Is Displayed in the Journey Analytics Dashboard?

Data for all versions of the journey is aggregated by day and displayed in the dashboard.

Why Aren't All My Google Analytics Audiences Listed on the Setup Page?

To appear on the Setup page, an audience must be synced. Select all audiences for a property so that the integration can sync all of them.

SEE ALSO:

Track a Google Analytics Audience

Why Doesn't the Subscriber Count in the Audience Data Extension Match the Count in Google Analytics?

For audience members to appear in your data extension, they must have an `sfmc_id` attribute. To ensure that this attribute is passed from Marketing Cloud Engagement to Google Analytics, configure the `sfmc_id` parameter with a value of `%%subscriberid%%`.

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SEE ALSO:

Google Analytics Help: Google Analytics Properties

Why Can't I See All the Accounts, Properties, and Views in the Google Analytics View Dropdown Menu in the Journey Analytics Dashboard?

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I Purchased the Google Analytics Integration. Why Can't I See It?

Confirm that you have Marketing Cloud Engagement and Google Analytics administrator roles.

Verify that your users have the correct permissions.

- Assign a role and permissions to an Engagement user.
- Grant the admin user permission for the Google Analytics account.
- Configure Google Analytics Integration user permissions in Engagement Setup.

Is Google Analytics Data Stored in Marketing Cloud Engagement Data Extensions?

Yes. When you connect Google Analytics 4 properties, Marketing Cloud Engagement creates a data extension for each audience in the properties. Use that audience data extension to add contacts to a journey.

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No. Overlapping date ranges causes the system to count your data more than once and provides an inaccurate comparison of the data sets.

How Are Deltas Calculated for the Metrics Compare Feature in the Journey Analytics Dashboard?

To calculate the comparison metric value, the system subtracts the comparison date range metric value from the date range metric value.

👁 **Example:** Where the [Date Range Metric Value] is 56.25 and the [Comparison Date Range Metric Value] is 62.5 the calculation is 56.25% - 62.5% = - 6.25%

Can I Match Contacts Between Google Analytics and Marketing Cloud Engagement?

Yes. To identify a customer in an audience by matching the Client ID stored on the client machine in the GA cookie and the SFMC ID, the user's machine must initiate a session. You need both IDs to simulate a session and send a hit through the Google Analytics measurement protocol. To encourage engagement, you can send the customer a welcome email with a call-to-action link or button when they complete their online registration.

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Yes. You can manually append the `sfmc_id=%%subscriberid%%` parameter to a link, just like other UTM parameters. When you do, the subscriber is added to an audience, published to Marketing Cloud Engagement, and added back into a journey using the data extension for the audience.

SEE ALSO:

[Use an Audience Data Extension in a Journey Entry Step](#)

Can I Remove Duplicate IDs?

Yes. In Google Analytics, you can expose the subscriber ID from Marketing Cloud Engagement as a custom dimension. If multiple Google Client IDs have the same subscriber ID, the integration deduplicates the Google ID before it's sent to Marketing Cloud Engagement.

Using Einstein in Marketing Cloud Engagement

In Marketing Cloud Engagement, Einstein provides insights and data to inform the content and timing of your marketing activities. Use powerful Einstein features to understand the engagement and behaviors of your customers so you can personalize every interaction that you create in Marketing Cloud Engagement.
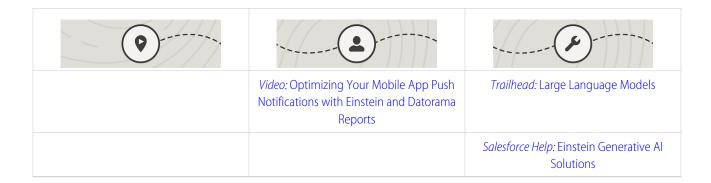
Your Guide to Einstein in Marketing Cloud Engagement

Get Started with Einstein	Find Einstein Use Cases	Set Up and Maintain
Salesforce Help: Feature Overview and Requirements	*Salesforce Help:* Explore Marketing Cloud Einstein Solutions	*Trailhead:* Marketing Cloud Einstein Activation: Quick Look

Salesforce Help: Email Client Privacy Metrics in Marketing Cloud Engagement Einstein	*Trailhead:* Artificial Intelligence for Marketers	*PDF Guide:* Marketing Cloud Personalization Builder and Einstein Recommendations Implementation Guide
Salesforce Help: Understand the Data	*Trailhead:* Artificial Intelligence for Social Media	*Salesforce Developer:* Einstein REST APIs
Trailhead: Einstein for Marketing Cloud Basics	*Trailhead:* Artificial Intelligence for Advertisers	*Salesforce Developer:* Authentication through Marketing Cloud OAUTH
Salesforce Developer: Marketing Cloud Einstein Overview		
Automate Content Personalization	**Automate Recommendations**	**Find the Right Audience at the Right Time**
Salesforce Help: Einstein Content Tagging	*Salesforce Help:* Einstein Email Recommendations	*Salesforce Help:* Einstein Send Time Optimization
Salesforce Help: Einstein Content Selection	*Salesforce Help:* Einstein Web Recommendations	*Salesforce Help:* Einstein Engagement Scoring
Trailhead: Einstein Content Selection Basics	*Salesforce Developer:* Einstein Recommendations API	*Salesforce Help:* Einstein Engagement Frequency
Trailhead: Einstein Content Selection Solutions	*Video:* Einstein Web Recommendations	*Trailhead:* Einstein Send Time and Frequency Optimization
Video: Einstein Content Selection	*Trailhead:* Einstein Email and Web Recommendations	*Trailhead:* Einstein Engagement Scoring in Marketing Cloud
Salesforce Developer: Introduction to Einstein Content Selection APIs	*Video:* Einstein Email Recommendations Setup Wizard	*Video:* Einstein Send Time Optimization
	Video: Admin Best Practices: Introducing Einstein Recommendation Builder	*Video:* Personalization Made Simple with Einstein Engagement Frequency
Gain Content Insights	**Model Cards for Einstein Predictive Features**	**Confidently Use Einstein Generative AI Features**
Salesforce Help: Einstein Copy Insights	*Salesforce Help:* Einstein Engagement Frequency Model Card	*Salesforce Help:* Enable Einstein Generative AI in Marketing Cloud Engagement

Salesforce Help: Einstein Messaging Insights	*Salesforce Help:* Einstein Engagement Scoring for Email Model Card	*Salesforce Help:* Marketing Cloud Einstein Generative AI Usage
Video: Einstein Messaging Insights	*Salesforce Help:* Einstein Engagement Scoring for Mobile Model Card	*Salesforce Help:* Set Up Brand Settings to Ground Your Einstein Generative AI Content
Trailhead: Einstein Messaging Insights: Quick Look	*Salesforce Help:* Einstein Messaging Insights Model Card	*Salesforce Help:* Create Messages in Content Builder Using Einstein Generative AI
	Salesforce Help: Einstein Send Time Optimization for Email Model Card	*Salesforce Help:* Create Content in Einstein Copy Insights Using Einstein Generative AI on page 288
	Salesforce Help: Einstein Send Time Optimization for Mobile Model Card	*Salesforce Help:* Typeface Generative AI Content
	Salesforce Help: Einstein Subject Line Tester Model Card	
	Salesforce Help: Einstein Metrics Guard Model Card	
	Salesforce Help: Einstein Content Selection and Testing Model Card	
	Salesforce Help: Einstein Email and Web Recommendations Model Card	
Global Data Usage and Trusted AI in Marketing Cloud Engagement	**Learn More About Einstein in Marketing Cloud Engagement**	**Learn More About Einstein Generative AI**
Salesforce Help: Global Model Data Opt In and Opt Out	*Salesforce:* AI Revolution (Download)	*PDF:* Artificial Intelligence Acceptable Use Policy
Salesforce Help: A Marketer's Guide to the Trusted Use of Einstein	*Video:* Optimizing Your Mobile App Push Notifications with Einstein and Datorama Reports	*Salesforce Blog:* Responsible AI in Marketing: Embedding Ethics by Design
Salesforce Help: Einstein Generative AI & Trust	*Video:* Einstein for Marketing Cloud Engagement: Single Send Journeys	*Trailhead:* Generative AI Basics
Salesforce Help: Einstein Trust Layer	*Video:* Optimizing Your Mobile App Push Notifications with Einstein and Datorama Reports	*Trailhead:* Artificial Intelligence Fundamentals

	Video: Optimizing Your Mobile App Push Notifications with Einstein and Datorama Reports	*Trailhead:* Large Language Models
		Salesforce Help: Einstein Generative AI Solutions

2

Einstein Generative AI in Marketing Cloud Engagement

Use Einstein generative AI to create and personalize nearly-there drafts of message copy, already contextualized and grounded in your Salesforce data. In Einstein Copy Insights, you can test, copy, and download your generated subject lines and body copy. In Content Builder, quickly create subject lines and body copy to use in your messages. An optional Typeface add-on provides generative image capabilities using a content block in Content Builder.

Email Client Privacy Metrics in Marketing Cloud Engagement Einstein

Some email client providers have privacy methods that impact open rate metrics and calculations. Einstein Metrics Guard provides more accurate predictions by discerning real opens from bot opens.

Einstein for Marketing Cloud Engagement Feature Overview and Requirements

Find out if using Einstein is right for your business.

Explore Marketing Cloud Engagement Einstein Solutions

Add AI to your marketing efforts, and see how Einstein can help your marketing organization solve common use cases with better results. Use Einstein Overview and Learning Center to review important key performance indicators for individual applications.

Understand the Data That Einstein Uses

Providing Einstein with good data makes it more likely to get good predictions. For Einstein predictive features, use data quality scores to understand the quality of the data that each Einstein app requires to generate predictions, insights, analytics, and more. Find data quality metrics on each Einstein app dashboard and Einstein Overview card.

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Einstein Engagement Scoring

Einstein Engagement Scoring predicts consumer engagement with email and MobilePush messaging. It uses customer data and machine learning to assign scores for each contact's likelihood to engage with emails or interact with push notifications. Einstein Engagement Scoring aggregates your customer data in a dashboard that provides audience-level insights and individual contact-level scores.

Einstein Messaging Insights

Einstein Messaging Insights alerts you to changes in your marketing performance no matter where you are in Marketing Cloud Engagement. The Einstein notifications badge appears in the header, where it's constantly accessible to let you know how your email sends and journeys perform. When an anomaly occurs, the notifications badge alerts you. Go to the insights hub for more information about quantifying your results.

Einstein Send Time Optimization

Einstein Send Time Optimization (STO) in Marketing Cloud Engagement determines the best time to send a message. Using machine learning, Einstein predicts optimal send times so that a user is more likely to engage with your message.

Einstein Engagement Frequency

Avoid a lack of awareness from too few messages or burnout from too many messages. Einstein Engagement Frequency in Marketing Cloud Engagement evaluates your contacts and subscribers and identifies the optimal number of email messages to send.

Einstein Copy Insights

Einstein Copy Insights uses text analytics and natural language processing to analyze the text from your commercial email subject lines to uncover language insights. Use these insights to craft subject lines and body copy that drive stronger email engagement.

Einstein Content Selection

Einstein Content Selection is a no-code, open-time experimentation tool for personalized content. Because Einstein selects content at open time, it continues to evaluate for winning content while also experimenting to ensure that click-through rates are optimized.

Einstein Content Testing

To optimize engagement, quickly test images in Einstein Content Testing. For more complex personalized targeting, use Einstein Content Selection, which includes fatigue rules and targeted content based on user preferences.

Einstein Content Tagging

Einstein Content Tagging applies searchable tags to image files in your Marketing Cloud Engagement account. You can have Einstein add up to 25 tags per image. Einstein tags existing JPG, JPEG, and PNG files that are 10 MB or less.

Einstein Email Recommendations

Use Einstein Email Recommendations to observe customer behavior, build preference profiles, and deliver the next-best content or product. You can also refine recommendations to match your business rules. Recommendation content surfaces in placeholders for recommendations on your website.

Einstein Email and Web Recommendations Model Card

The model in this card analyzes and provides personalized product and content recommendations.

Einstein Web Recommendations

Einstein Web Recommendations use Einstein's capabilities to observe behavior, build preference profiles, and deliver the next-best personalized content to each website visitor. Use scenarios in the application to refine recommendations to match your specific business rules. Predictive content is surfaced in placeholders for recommendations on your website.

A Marketer's Guide to the Trusted Use of Einstein

Salesforce believes that the benefits of AI can, and should, be accessible to everyone. But increasingly, AI is facing a crisis of trust. Therefore, trust is at the top of Salesforce's priority list for customers.

Einstein Generative AI in Marketing Cloud Engagement

Use Einstein generative AI to create and personalize nearly-there drafts of message copy, already contextualized and grounded in your Salesforce data. In Einstein Copy Insights, you can test, copy, and download your generated subject lines and body copy. In Content Builder, quickly create subject lines and body copy to use in your messages. An optional Typeface add-on provides generative image capabilities using a content block in Content Builder.

Related Content

Einstein Generative AI & Trust

Einstein Trust Layer

Generative AI Basics

Artificial Intelligence Fundamentals

Enable Einstein Generative AI in Marketing Cloud Engagement
Enable Einstein generative AI features to create subject lines and body copy in Einstein Copy Insights and Content Builder. When you use Einstein generative AI instead of a generally available service such as OpenAI, you're protected by the Salesforce Trust Layer.

Brand Settings and Personalities
Define your organization's brand identity and add the personalities to use when generating tailored content. In addition to the provided Professional and Casual personalities, you can create up to 10 more personalities to match your needs. Then use Einstein generative AI features to create messages that reflect what you want to convey to your customers.

Set Up a Brand for Generating Content
Define your organization's brand identity and personality. In addition to the provided Professional and Casual personalities, you can create up to 10 more personalities to match your needs. Einstein generative AI features use the information to create messages that reflect what you want to convey to your customers. You can set any personality as your default.

Marketing Cloud Engagement Einstein Generative AI Limits

Einstein generative AI features are included in Corporate, Enterprise, and Enterprise + editions. Using Einstein generative AI to create subject lines or body copy options constitutes a generation. To prevent misuse, each Enterprise account is capped at 10,000 generations, giving you plenty of ability to use your creativity and harness the power of Einstein to improve your marketing copy.

Enable Einstein Generative AI in Marketing Cloud Engagement
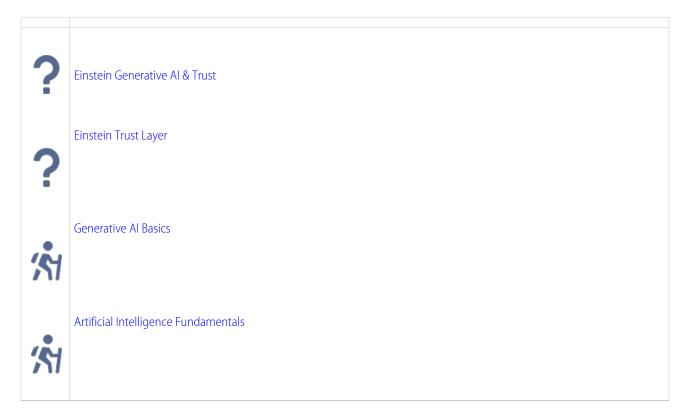
Enable Einstein generative AI features to create subject lines and body copy in Einstein Copy Insights and Content Builder. When you use Einstein generative AI instead of a generally available service such as OpenAI, you're protected by the Salesforce Trust Layer.

When you enable Einstein generative AI, you gain access to subject line generation and body copy generation in both Einstein Copy Insights and in Content Builder. In Einstein Copy Insights, you can test, copy, and download your generated copy. In Content Builder, use the features to create content to populate your messages. Optionally, use the Content Builder and Typeface integration to add image generation to the mix.

Generative AI is known to include inaccurate or harmful responses. Always review the output for accuracy and safety. When using Einstein generative AI features, you assume responsibility for the output.

To use Einstein generative AI features, enable both Einstein Copy Insights and Einstein generative AI. Follow the steps outlined in Set Up Einstein Copy Insights on page 280, and then turn on Einstein generative AI features.

Related Content

?	Einstein Generative AI & Trust
?	Einstein Trust Layer
🏃	Generative AI Basics
🏃	Artificial Intelligence Fundamentals

Brand Settings and Personalities

Define your organization's brand identity and add the personalities to use when generating tailored content. In addition to the provided Professional and Casual personalities, you can create up to 10 more personalities to match your needs. Then use Einstein generative AI features to create messages that reflect what you want to convey to your customers.

By thoroughly and thoughtfully setting up an identity that's relevant for each of your business units, marketing leadership can generate content that aligns to your brand automatically. You set up the identity and personalities one time, and then the information persists in all your generative content. In addition to the Salesforce Trust Layer, grounding your prompts using information specific to your brand makes the content that Einstein generates as accurate as possible. You can also set any personality as a default. The default personality is added to every generation, and along with the brand identity, it provides more personalized and consistent results.

When you set up a brand personality give it a name and describe what that the personality means to your brand as if you were describing it to a copywriter. The more descriptive you can be, the better your results. Here are some examples.

- You want to convey a sense of urgency. You create a personality called Urgent with this description.

  A style that uses clear and concise language combined with time-sensitive words. Always prioritize genuine deadlines or actions at the beginning, and avoid overusing all caps or multiple exclamation points to maintain trust and avoid appearing aggressive.

- You want to convey curiosity. You create a personality called Inquisitive with this description.

  Pose genuine questions relevant to the recipient's interests or needs. Use open-ended queries that pique curiosity without being overly complex, and ensure that the content provides an answer or solution to the question posed, fostering engagement and a desire to learn more.

Different factors can impact your brand personality choices, including the needs of individual business units. Einstein takes your brand identity and the personality that you choose into account when generating content. If you don't see a personality in the list that fits your needs, ask your Salesforce admin to set up a new personality for you in Einstein Copy Insights Brand Settings setup.

👁 **Example:** Your upcoming campaign targets avid hikers and campers to promote quick dry socks. You create a brand personality called Adventurous that reflects the persona. Then, Einstein takes your organization's brand identity and your chosen personality into account when you generate content for the campaign.

Set Up a Brand for Generating Content

Define your organization's brand identity and personality. In addition to the provided Professional and Casual personalities, you can create up to 10 more personalities to match your needs. Einstein generative AI features use the information to create messages that reflect what you want to convey to your customers. You can set any personality as your default.

1. In Setup, go to Platform Tools, Einstein, and select **Einstein Copy Insights**.

2. Activate Einstein Copy Insights, and enable Einstein Generative AI Features.

3. Under Brand Settings, click **Edit**.

4. In the text field, describe your brand.

5. (Optional) Associate the brand with a business unit.

6. Select a personality, or select **Add Custom** to create a brand personality. You can create up to 10 personalities.

7. Save your changes.

Marketing Cloud Engagement Einstein Generative AI Limits

Einstein generative AI features are included in Corporate, Enterprise, and Enterprise + editions. Using Einstein generative AI to create subject lines or body copy options constitutes a generation. To prevent misuse, each Enterprise account is capped at 10,000 generations, giving you plenty of ability to use your creativity and harness the power of Einstein to improve your marketing copy.

You can't currently monitor your data usage in Marketing Cloud Engagement, but your Salesforce Account Executive is notified of overages if you do reach the limit.

An API call is made each time a marketer clicks the Create button in an Einstein generative AI feature, and a set of results is provided. Subject lines and body copy provide five options per click. The five results constitute one generated API call.

Email Client Privacy Metrics in Marketing Cloud Engagement Einstein
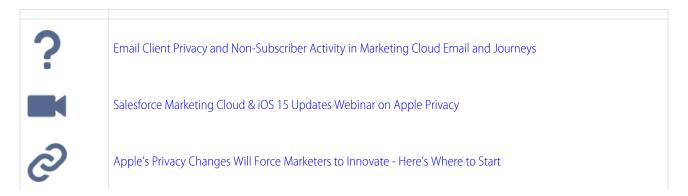
Some email client providers have privacy methods that impact open rate metrics and calculations. Einstein Metrics Guard provides more accurate predictions by discerning real opens from bot opens.

Your Marketing Cloud Engagement Einstein apps don't use only traditional open rate metrics. Instead, they use an engagement rate metric that incorporates a blend of signals, including clicks combined with open rate metrics, to give you a more holistic view of your customers' real engagement with your content.

Table 13: Einstein App Metrics

Einstein App	Details
Einstein Send Time Optimization	The model uses an engagement rate instead of solely an open rate to determine the most optimal send time.
Einstein Copy Insights	Einstein Copy Insights uses the engagement rate instead of solely an open rate to generate language insights and predict future performance.
Einstein Messaging Insights	Open rates reported in Einstein Messaging Insights could be less reliable due to privacy updates. Einstein Messaging Insights can still detect open rate insights because the model uses relative changes.
Einstein Engagement Frequency	The model uses an engagement rate and unsubscribe rate instead of solely an open rate to provide more accurate metrics.
Einstein Engagement Scoring	The model uses an engagement rate for personas instead of an overlap between open and click rate.

Related Content

Email Client Privacy and Non-Subscriber Activity in Marketing Cloud Email and Journeys

Salesforce Marketing Cloud & iOS 15 Updates Webinar on Apple Privacy

Apple's Privacy Changes Will Force Marketers to Innovate - Here's Where to Start

	Marketing and Consumer Privacy

Einstein Metrics Guard (Probabilistic Opens) Model Card

The model in this card analyzes how open events are calculated and the likelihood that each open event is real. This behind-the-scenes functionality was renamed Einstein Metrics Guard in the Spring '24 release. You can't disable this feature.

Einstein Metrics Guard (Probabilistic Opens) Model Card

The model in this card analyzes how open events are calculated and the likelihood that each open event is real. This behind-the-scenes functionality was renamed Einstein Metrics Guard in the Spring '24 release. You can't disable this feature.

Model Details

The Einstein Metrics Guard model in Marketing Cloud Engagement analyzes message open likelihood using these training algorithms, parameters, fairness constraints, features, and other applied approaches.

Intended Use

The Einstein Metrics Guard model in Marketing Cloud Engagement is intended for these use cases.

Relevant Factors

These factors are associated with the Einstein Metrics Guard model in Marketing Cloud Engagement.

Metrics

Einstein evaluates and monitors model performance metrics to ensure and improve the quality of the model. These performance measures are associated with the Einstein Metrics Guard model.

Training Data

You have a customized version of the model that's trained on your data alone. Data from one Salesforce customer doesn't affect the behavior for another Salesforce customer. While model training happens for each customer on their data, the initial development of the model is validated with a representative set of pilot customers' data.

Ethical Considerations

Review the ethical factors associated with the Einstein Metrics Guard model in Marketing Cloud Engagement. To avoid bias and other ethical risks, the Einstein Metrics Guard model doesn't include demographic data.

Model Details

The Einstein Metrics Guard model in Marketing Cloud Engagement analyzes message open likelihood using these training algorithms, parameters, fairness constraints, features, and other applied approaches.

Person or Organization

Salesforce Einstein in Marketing Cloud Engagement

Model Date and Version

- December 2021
- Minor changes can occur throughout the release.

- Major changes can occur and are communicated via release notes.

Model Type

Time-series analysis, Predictive modeling

General Information

Einstein Metrics Guard assigns each email open event a confidence score that represents the event being a human-initiated real open. The score ranges from 0% to 100%. Higher scores represent higher confidence that the open is real. Lower scores represent a higher chance that the open event is machine-generated.

The model analyzes a subscriber's historical events and engagement patterns to predict the chance that an open is real. The model performs event association and attribution to monitor behavior changes. Most recent behavior changes and engagement patterns are emphasized more heavily in the predictions.

Compared to a typical filtering-based approach, the probabilistic open metrics guard model provides more accurate results by reducing the risk of false positive and false negative results while minimizing information loss. Probabilistic opens are foundational to all other Einstein modeling and products. Einstein trains each customer's model using only that customer's data.

Constraints

There are no discernible constraints.

License

Einstein Metrics Guard is available to Marketing Cloud Engagement customers with any of these editions.

- Corporate Edition
- Enterprise Edition
- Enterprise+ Edition

Questions or Comments

Send questions or comments about the model to mce-support@salesforce.com.

Intended Use

The Einstein Metrics Guard model in Marketing Cloud Engagement is intended for these use cases.

Primary Intended Uses

- The Einstein Metrics Guard model provides a layer of information that helps Einstein calculate how trustworthy each email open is. This model is in response to Mail Privacy Protection implemented by some email client providers. As a result, Einstein can build more accurate models and provide better recommendations.
- Marketers can gain insights from Einstein Metrics Guard that provide a more realistic view of subscriber engagement levels. Using this insight, marketers can conduct further segmentation or better targeting on future campaigns.

Out-of-Scope Use Cases

Anything other than the primary use case is out of scope and not recommended.

Relevant Factors

These factors are associated with the Einstein Metrics Guard model in Marketing Cloud Engagement.

Model Input

Einstein Engagement Frequency analyzes up to 90 days of historical engagement patterns of the subscribers. The engagement history includes these factors.

- Email sends, bounces, and engagement events including open, click, and unsubscribe, spam complaints, and associated timestamps
- Data and metadata about customer sending patterns, including how campaigns are executed

The engagement history that Einstein Metrics Guard analyzes excludes these factors.

- Data purchased or collected from third parties
- Demographic Data, which is typically stored in SFMC as data extensions or subscriber or contact attributes
- Specific content in the email template or rendered email body

Model Output

For each open event, a probabilistic score is produced to measure the likelihood that the open is real.

Groups

The model doesn't include demographic data or other data purchased from third-party data providers.

Environment

The model is trained and deployed in the Marketing Cloud Engagement environment.

Metrics

Einstein evaluates and monitors model performance metrics to ensure and improve the quality of the model. These performance measures are associated with the Einstein Metrics Guard model.

Model Performance Measures

Model performance metrics include data like model mean absolute error score.

Training Data

You have a customized version of the model that's trained on your data alone. Data from one Salesforce customer doesn't affect the behavior for another Salesforce customer. While model training happens for each customer on their data, the initial development of the model is validated with a representative set of pilot customers' data.

Ethical Considerations

Review the ethical factors associated with the Einstein Metrics Guard model in Marketing Cloud Engagement. To avoid bias and other ethical risks, the Einstein Metrics Guard model doesn't include demographic data.

As you interpret your data, be aware of making assumptions based on the scores generated. Scenarios with potential adverse outcomes can occur in certain circumstances.

👁 **Example:** The model predicted low engagement for a certain segment, so Phil chooses not to send a marketing communication to that set of customers. But if that prediction was inaccurate, Phil inadvertently caused some customers to miss benefits or opportunities.

Einstein for Marketing Cloud Engagement Feature Overview and Requirements

Find out if using Einstein is right for your business.

Einstein for Marketing Cloud Engagement uses Salesforce's AI to help you best evaluate and implement your marketing activities. Use valuable insights on audiences, send time, engagement frequency, and your content to best target your customers. Deliver information to your customers when they need it and how they need it.

Einstein offers a range of opportunities for you to analyze, automate, and optimize your content. Use the apps to gain insight and better target your audiences.

These Marketing Cloud Engagement platforms feature Einstein:

Cloud Product	Compatibility (Editions)
Messaging and Journeys (M&J)	Professional (Add On)
	Corporate
	Enterprise
	Enterprise+
Marketing Cloud Account Engagement	Advanced and Premium editions
Customer Data Platform	Dependent on M&J edition

To take advantage of Einstein features use the following engagement history:

Threshold	Days of Historical Data
Minimum	7
Recommended	28
Optimal	90

Key Marketing Operations Served by Einstein for Marketing Cloud Engagement

Smart Segmentation

- Einstein Engagement Scoring predicts consumer engagement with email and mobile push messaging. It uses customer data and machine learning to generate predictive models that assign scores to a contact's likelihood to engage with emails.

Smart Orchestration

- Einstein Send Time Optimization (STO) determines the best time to send an email or push notification.

- Einstein Engagement Frequency evaluates your contacts and identifies the optimal number of email messages or push notifications to send. Avoid a lack of awareness from too few messages or burnout from too many messages.

Smart Content

- Einstein Copy Insights analyzes the text from your email subject lines to uncover language insights. Use these insights to craft subject lines that drive stronger email engagement.
- Use Einstein Content Selection to send personalized content to each customer when they engage with your messages. You supply Einstein with content assets, and Einstein selects the best content for each contact based on their profile and category affinity.

Explore Marketing Cloud Engagement Einstein Solutions

Add AI to your marketing efforts, and see how Einstein can help your marketing organization solve common use cases with better results. Use Einstein Overview and Learning Center to review important key performance indicators for individual applications.

Einstein overview cards show a snapshot of each Einstein app. Click **Details** to flip to the details on the back of the card. Details provide a summary of how each Einstein application uses your data. It shows which channels and parts of Marketing Cloud Engagement the app supports and the workflows that it's designed to help you optimize. A single app can support multiple channels, workflows, and applications. But not every feature in the app supports everything indicated on the card. Consult feature-specific considerations for details.

In the Data section, you can see whether the app uses data from individual Business Units, data from all Business Units in your Enterprise, or Global data.

The Channels section shows whether the app works with Email, MobilePush, or both.

Workflow Types show the types of workflows the selected Einstein app supports including Content Creation, Data Augmentation, Orchestration, Insight Generation, and Segmentation.

The Application Support section shows which Marketing Cloud Engagement applications work with the selected Einstein app. Most apps work with Journey Builder. But these other apps can also work with various Einstein apps.

- Content Builder
- Mobile Studio
- Email Studio
- Automation Studio

Einstein Learning Center is an interactive, educational, use-case-driven portal that links Einstein apps and features directly to real marketing key performance indicators (KPIs). In-app links to IdeaExchange and the Trailblazer Community make it easy to engage, collaborate, and share ideas with other marketers.

In the navigation, find the Einstein Learning Center by clicking Einstein Learning Center, then **Overview**. Use an application's overview card to explore primary KPIs or navigate to the app directly. In Learning Center, select a use case card in the ribbon at the bottom to review how Einstein solves it.

With Einstein Send Time Optimization you can preview the best send times for a data extension that you plan to use for sending. Click **Preview** in the Einstein Learning Center to get started.

You can collapse or expand the Learning Center by clicking   in the banner.

SEE ALSO:

Understand the Data That Einstein Uses
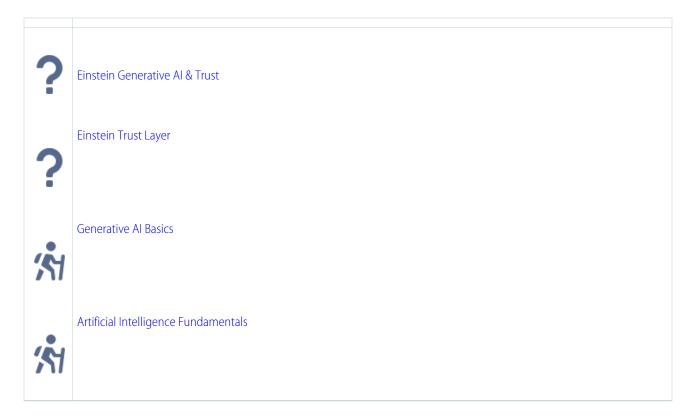
Providing Einstein with good data makes it more likely to get good predictions. For Einstein predictive features, use data quality scores to understand the quality of the data that each Einstein app requires to generate predictions, insights, analytics, and more. Find data quality metrics on each Einstein app dashboard and Einstein Overview card.

Considerations

- Achieving a 100% data quality score isn't the objective. Instead, use your current score as a benchmark for future results. When your data score is above the minimum threshold, you're likely to see benefits from AI.
- The longer Einstein is enabled and learning, the better your results are likely to be. Each Einstein app is unique, but most apps can deliver results within 90 days.
- AI works best when it has lots of data to analyze. Using global data models for predictive apps boosts the amount of data used for making predictions. Global models safely harness the power of Salesforce to provide more accurate, actionable results.

Transactional sends and test sends are excluded when generating your data quality score.

Related Content

?	Einstein Generative AI & Trust
?	Einstein Trust Layer
🧗	Generative AI Basics
🧗	Artificial Intelligence Fundamentals

Einstein and Data Usage in Marketing Cloud Engagement
Einstein is built on data. When using Marketing Cloud Engagement, review this table to understand the type of data used by Einstein features.

Global Model Data Opt In and Opt Out in Marketing Cloud Engagement

Einstein intelligence is built on data. The more data Einstein has, the more powerful the resulting predictions. Most organizations don't have enough data to build their own models. To give you more meaningful predictive AI, Salesforce builds global predictive models that scan for aggregate, anonymous trends across many Salesforce customers. To protect your customer data, your account is opted out of the global data model by default.

Gauge Your Einstein Engagement Scoring Data Quality

Check your mobile app's data quality score for insight about the engagement data that Einstein uses to predict your customers' likelihood to engage. Data quality scores for Einstein Engagement Scoring are generated at the mobile app level only.

Data Residency

Hyperforce is the next-generation Salesforce infrastructure architecture that gives you more choice and control over data residency. If your organization in India uses Hyperforce, Einstein can process data outside your geographical location. Japan and Australia maintain data residency in their local region.

SEE ALSO:

Evolve Your Marketing Strategy with Artificial Intelligence

Einstein and Data Usage in Marketing Cloud Engagement

Einstein is built on data. When using Marketing Cloud Engagement, review this table to understand the type of data used by Einstein features.

The table lists both the Customer Data that is used, which is data submitted by the Customer to our services as defined in our Main Services Agreement (MSA), and the usage data that is used, which is data relating to users' interactions with Salesforce. Data submitted to an Einstein feature may be used to train AI models, to improve your services and features, or to develop new features that you can access without additional cost.

The table also indicates which features use global models, which are models that look for aggregated trends across multiple Salesforce Customers. The Customer has control over whether their data contributes to global models. For more information on how to control how your data is used, see Global Model Data Opt-In and Opt-Out on page 231 for Marketing Cloud Engagement.

Cloud or Package	Feature	Data Used	Generative AI Model Used	Global Model Used
Einstein available in Marketing Cloud Engagement Corporate, Enterprise, and Enterprise + editions.	Subject Line Generation in Einstein Copy Insights and Content Builder	Admin submitted brand identity and brand personalities. Marketing submitted key message.	Yes - OpenAI	No
	Body Copy Generation in Einstein Copy Insights and Content Builder	Admin submitted brand identity and brand personalities. Marketing submitted key message.	Yes - OpenAI	No
	Send Time Optimization for Email	Email Engagement (email sends, opens, clicks, unsubscribes, bounces, spam complaints), Customer sending pattern data and metadata,	No	Yes - optional

Cloud or Package	Feature	Data Used	Generative AI Model Used	Global Model Used
		Email address (anonymized when using global models		
	Send Time Optimization for Mobile	App Engagement (Push, TapOpen, AppOpen, TimeInApp), Customer sending pattern data and metadata	No	No
	Engagement Scoring for Email	Email Engagement (email sends, opens, clicks, unsubscribes, bounces, spam complaints), Customer sending pattern data and metadata, User Retention and Subscription History, Subscriber web interaction events (view, search, profile, and purchase), customer-defined categorization thresholds, Email address (anonymized when using global models)	No	Yes - optional
	Engagement Scoring for Mobile	App Engagement (Push, TapOpen, AppOpen, TimeInApp), Customer sending pattern data and metadata, customer-defined categorization thresholds	No	Yes - optional
	Engagement Frequency	Email Engagement (email sends, opens, clicks, unsubscribes, bounces, spam complaints), Customer sending pattern data and metadata, Subscriber ID	No	No
	Product Recommendations (Email)	Behavioral Data (pageviews, carts, conversions, categories, wishlists), recommendation engagement (recommendation views, clicks, carts, purchases), and User Attributes provided through Collect.js	No	No
	Product Recommendations (Web)	Behavioral Data (pageviews, carts, conversions, categories, wishlists), recommendation engagement (recommendation views, clicks, carts, purchases), and user attributes provided through Collect.js	No	No
	Content Selection	Email Engagement (email sends, opens/selections, clicks), optional start-end dates, optional simple rules that exclude assets based on meta-data or previous selections for subscribers.	No	No
	Content Testing	Email Engagement (email sends, opens, clicks)	No	No
	Content Tagging	Images	No	No

Cloud or Package	Feature	Data Used	Generative AI Model Used	Global Model Used
	Subject Line Tester	Email Engagement (email sends, opens, clicks, unsubscribes, bounces, spam complaints), subject lines	No	Yes - required
	Copy Insights	Email Engagement (email sends, opens, clicks, unsubscribes, bounces, spam complaints), subject lines	No	No
	Messaging Insights	Email Engagement (email sends, opens, clicks, unsubscribes, bounces, spam complaints), Customer sending pattern and campaign data and metadata (for example, batch sends, Journey Builder sends, Automation Studio sends, transactional sends, triggered sends, past, and future automations), subject lines	No	No
	Einstein Metrics Guard	Email Engagement (email sends, opens, clicks, unsubscribes, bounces, spam complaints), Customer sending pattern data and metadata	No	No

Global Model Data Opt In and Opt Out in Marketing Cloud Engagement

Einstein intelligence is built on data. The more data Einstein has, the more powerful the resulting predictions. Most organizations don't have enough data to build their own models. To give you more meaningful predictive AI, Salesforce builds global predictive models that scan for aggregate, anonymous trends across many Salesforce customers. To protect your customer data, your account is opted out of the global data model by default.

Data Usage

Einstein provides two different types of features in Marketing Cloud Engagement: predictive AI and generative AI. Only Einstein predictive features use global models. A global model doesn't include any Einstein generative AI features, such as subject line generation and body copy generation.

The predictive Einstein features have corresponding model cards that provide details about data usage. To review which features use global models, see Einstein and Data Usage in Marketing Cloud Engagement on page 229. When you participate in a global model, all identifiable data for contacts added to the global pool is removed, and no customer data is shared with other enterprises.

What Is a Global Model?

Most Salesforce Einstein features build a unique predictive model based on each customer's own Salesforce data. This single-customer model is great for features that don't require much data, but some models require more data than any single customer can provide. A global model combines data from multiple Salesforce orgs to create a predictive model that is used by many.

When you enable global data, you can get better predictions by incorporating data from the Marketing Cloud Engagement global data pool. As a result, predictions are more accurate and can cover more contacts in your enterprise, leading to better engagement rates.

If you opt out of using global models, it applies to all Einstein features for the MID, including existing features and any features added after.

How Do Global Models Impact My Data?

Einstein generative AI features use the Salesforce LLM Gateway. When you use Einstein instead of a generally available service such as OpenAI, you're protected by the Salesforce Trust Layer. If your Salesforce data is included in global models, rest assured that nothing changes in terms of security, privacy, or data residency. Your data stays in our trusted environment, as described in the Marketing Cloud Engagement Einstein Trust and Compliance Documentation. When applied to Einstein features, global models never cause any of your data, including confidential information, to be shared with other customers.

Opting Out

You can exclude your data from Marketing Cloud Engagement Einstein global data models. An Engagement admin can opt out of global models in Setup. If you opt out, your data isn't used to build global models. Additionally, Salesforce won't use your customer data for research and development of new services or features, and no Salesforce employee can view your customer data outside of a support case, pilot, or as otherwise described in your legal agreements. Opt-outs are controlled at the Enterprise ID (EID) level.

Example:

SEE ALSO:

Activate Einstein Send Time Optimization

Salesforce Einstein: Global Model Opt-Out Process

Gauge Your Einstein Engagement Scoring Data Quality

Check your mobile app's data quality score for insight about the engagement data that Einstein uses to predict your customers' likelihood to engage. Data quality scores for Einstein Engagement Scoring are generated at the mobile app level only.

Each mobile app's data quality score is generated by analyzing the app's engagement data. This analysis determines a Pattern Predictability score and a Data Maturity score.

- To determine the Pattern Predictability score, Einstein analyzes the distinctness of your customers' engagement patterns with your mobile app. Greater pattern predictability leads to more accurate predictions of future engagement behavior. When your messages are more compelling and drive higher engagement rates, your Pattern Predictability score is higher. When your engagement rates are lower, your Pattern Predictability score is lower. Pattern Predictability differs from engagement rate because it evaluates engagement events as they correlate to one another throughout your customers' engagement history.

- To determine the Data Maturity score, Einstein analyzes the length of time that each of your customers has had data available to make predictions, and how much data is available. This score helps Einstein understand how sensitive your subscribers are to changes in your sending patterns over time. When you have a greater history of data for each of your customers, your Data Maturity score is higher.

To find your data quality score, navigate to the Einstein Engagement Scoring for MobilePush dashboard. To see your scores and tips that can help raise your data quality score, click **Data Quality Score**.

> **Note:** Transactional sends and test sends are excluded when generating your data quality score.

SEE ALSO:
Einstein Engagement Scoring for Mobile Model Card
Evolve Your Marketing Strategy with Artificial Intelligence

Data Residency

Hyperforce is the next-generation Salesforce infrastructure architecture that gives you more choice and control over data residency. If your organization in India uses Hyperforce, Einstein can process data outside your geographical location. Japan and Australia maintain data residency in their local region.

For additional migration details, see the Migration to Hyperforce FAQs article.

Einstein Copy Insights contains the Emotional Tone Widget feature. The Emotional Tone Widget doesn't offer data residency, and can't be disabled independent of the Einstein Copy Insights feature. If you require data residency, don't activate Einstein Copy Insights.

> **Example:** Your organization in India is on Hyperforce. You enable Einstein features to identify the best time to send messages to your customers. Your Einstein data is processed in data stacks in another region.

Einstein Engagement Scoring

Einstein Engagement Scoring predicts consumer engagement with email and MobilePush messaging. It uses customer data and machine learning to assign scores for each contact's likelihood to engage with emails or interact with push notifications. Einstein Engagement Scoring aggregates your customer data in a dashboard that provides audience-level insights and individual contact-level scores.

Einstein Engagement Scoring has no admin-level permission controls to limit users.

Einstein Engagement Scoring populates and uses data extensions named Einstein_MC_Predictive_Scores and Einstein_MC_MobilePush_Scores for MobilePush and email. For the most accurate results, keep your subscriber key consistent across all data extensions. If you see unexpected scores and persona results, consider using global models on page 231, or check your custom threshold on page 243 settings.

Find engagement scoring data extensions via Contact Builder or Email Studio. Use the scores for these purposes.

EDITIONS
Available in: **Corporate** and **Enterprise** Editions, and as an add-on to **Pro** Edition If you purchased your Salesforce edition before 2018, contact your account representative to obtain Einstein Engagement Scoring.

- Monitor the health of your engaged subscriber list in a dashboard.
- Create an audience from scores using attributes similar to your best-performing subscribers.
- Segment your subscriber list to identify and target a specific audience based on their predicted likelihood to engage with your campaigns.
- View model correlations that affect subscriber engagement using click bar graphs.
- Target subscribers through Marketing Cloud Engagement apps, such as Email Studio, Journey Builder, Marketing Cloud Advertising, or Audience Builder.
- Use momentum analytics to gain insights about subscriber Persona changes and their relationship to subscriber categorization.

Einstein Engagement Scoring uses Amazon Web Services. Einstein Engagement scores are refreshed weekly.

Prerequisites for Einstein Engagement Scoring

Up to 250 business units or MIDs per Enterprise ID can use Einstein Engagement Scoring for email. You can also use Einstein Engagement Scoring for mobile if you're using the Marketing Cloud Engagement Mobile SDK.

Activate Einstein Engagement Scoring

Turn on Einstein Engagement Scoring for Marketing Cloud Engagement in Setup. Einstein requires historical contact or subscriber engagement data, including at least 1,000 events in the 90 days before activation. It can take up to 90 days to generate initial scores, but engagement scores are typically available 24–48 hours after implementation.

Einstein Engagement Scoring Dashboard

Use the dashboard to view engagement predictions for email and MobilePush channels, including the likelihood to click an email or spend time in a mobile app, and other key performance indicators (KPI). To enable Web Conversion scoring, implement Collect Tracking Code. You can analyze subscriber Persona changes over time.

Engagement Score Thresholds

Each key performance indicator (KPI) in Einstein Engagement Prediction has an Audience Health indicator. This indicator shows whether the average grade for that score across all your subscribers is Excellent, Good, Fair, or Poor.

Einstein Engagement Scoring Personas

The Einstein Engagement Scoring heatmap groups subscribers into a customer persona based on predicted email engagement.

Create an Audience from Einstein Engagement Scores

Audience Builder offers pre-built Einstein Engagement Scoring dimensions to quickly and easily apply data science models to personalize your marketing campaigns and customer journeys.

Einstein Engagement Scoring for Mobile Model Card

The model in this card analyzes each contact's engagement record to assign scores for the contact's likelihood to interact with mobile messaging.

Einstein Engagement Scoring for Email Model Card

The model analyzed in this card predicts five types of engagement scores for each individual consumer contact in each customer's business unit. Predictions include email opens and clicks, subscriber retention, web conversion, and overall engagement.

Einstein Engagement Scoring FAQs

Get the answers to frequently asked questions about Einstein Engagement Scoring.

SEE ALSO:

Data Protection and Privacy

Prerequisites for Einstein Engagement Scoring

Up to 250 business units or MIDs per Enterprise ID can use Einstein Engagement Scoring for email. You can also use Einstein Engagement Scoring for mobile if you're using the Marketing Cloud Engagement Mobile SDK.

Considerations

- Einstein Engagement Scoring in Marketing Cloud Engagement analyzes only commercial send data, not transactional send data.
- Einstein Engagement Scoring uses automations to collect, convert, and export email send tracking data to the Einstein Platform. You can disable those automations, but this action can make engagement scores inaccurate when you re-enable the automations.
- The Einstein Engagement Scoring Email Unsubscribe Prediction tile doesn't work with custom unsubscribe handling, which can result in inaccurate Subscriber Retention key performance indicator (KPI) modeling. Using the LogUnsubEvent API is a standard unsubscribe, not a custom unsubscribe.

- Einstein Engagement Scoring doesn't support field-level encryption. SQL table data can't be field-level encrypted.
- Einstein Engagement Scoring requires at least 14 days of active subscriber evaluation in each business unit before you can view Persona changes over time.

Audience Builder Integration Considerations

Each of these Audience Builder integrations requires a separate services engagement or support. Contact your account representative for more information.

- Einstein Engagement Scoring provisioning for Audience Builder
- Activation with custom Audience Builder implementations
- Audience Builder implementations using Business Unit Filters

Web Conversion Modeling Considerations

- To use Web Conversion predictions, first set up a catalog and Collect Tracking Code for your website.
- Einstein Engagement Scoring supports subscriber key, which can be implemented with a support request. You can also use an email address, or an MD5 Hashed lowercase version of email address as your subscriber identifier in Collect Tracking Code.
- You can't import historical purchase data.
- Web Conversion predictions require 90 days after Einstein Engagement Scoring activation to collect enough data to create a model.
- Web Conversion requires enablement. Contact your account representative for more information.

SEE ALSO:

Activate Einstein Engagement Scoring

Turn on Einstein Engagement Scoring for Marketing Cloud Engagement in Setup. Einstein requires historical contact or subscriber engagement data, including at least 1,000 events in the 90 days before activation. It can take up to 90 days to generate initial scores, but engagement scores are typically available 24–48 hours after implementation.

Einstein Engagement Scoring currently has no admin-level permission controls. Up to 250 business units or MIDs per Enterprise ID can use Einstein Engagement Scoring for email.

Activate Einstein Engagement Scoring for mobile for each business unit, then choose mobile apps in the business unit to activate. Activate scoring and customize scoring thresholds for as many mobile apps as you wish. To make sure mobile apps are active and have sufficient data, check Setup.

📝 Note: Einstein Engagement Scoring is included with Corporate and Enterprise Edition, and is available as an add-on purchase to Pro Edition. For customers that purchased a Corporate or Enterprise Edition before October 27, 2017, Einstein Engagement Scoring is available at no additional charge upon execution of an Order Form with Additional Terms. Contact your account executive for details.

1. In Marketing Cloud Engagement, go to Setup.

2. Click **Einstein**.

3. Click **Einstein Engagement Scoring**.

4. Click **Activate Einstein Engagement Scoring**.

5. Click **Email** or **Mobile**.

    a. For Email, click **Activate**.

    b. For Mobile, click **Get Started**.

    c. Select the mobile apps to activate Einstein Engagement Scoring for.

    d. Click **Activate**.

After activation completes, edit the engagement score thresholds by clicking ⏷ , then **Edit Thresholds**. Select **Use custom thresholds**, and save the updates you make.

Einstein Engagement Scoring for Email Data Extension

The Einstein_MC_Predictive_Scores data extension stores Einstein Engagement Scoring for email metrics. Scoring metrics are updated weekly.

Einstein Engagement Scoring for MobilePush Data Extension

The Einstein_MC_MobilePush_Scores data extension stores Einstein Engagement Scoring for MobilePush metrics. Scoring metrics are updated weekly.

SEE ALSO:

Marketing Cloud Advertising

Audience Builder

Journeys and Messages

Prerequisites for Einstein Engagement Scoring

Einstein Engagement Scoring for Email Data Extension

The Einstein_MC_Predictive_Scores data extension stores Einstein Engagement Scoring for email metrics. Scoring metrics are updated weekly.

⚠ **Warning:** Don't delete or modify the data extensions named Einstein_MC_Predictive_Scores and Einstein_MC_MobilePush_Scores.

Einstein_MC_Predictive_Scores Fields include:

- Email_Address (text, 256 characters)
- EmailClickLikelihood (text, 256 characters)
- EmailClickScore (decimal)
- EmailOpenLikelihood (text, 256 characters)
- EmailOpenScore (decimal)
- EmailSubscribeLikelihood (text, 256 characters)
- EmailSubscribeScore (decimal)
- EmailEngagementPersona (text, 256 characters)
- ConversionLikelihood (text, 256 characters)
- ConversionScore (decimal)
- UpdatedDate (date)
- CreatedDate (date)

📝 **Note:** The EmailOpenScore and EmailClickScore can exceed the value 1.0.

To export the data, find the Einstein_MC_Predictive_Scores data extension in Email Studio or Contact Builder and click **Export**.

Einstein Engagement Scoring for MobilePush Data Extension

The Einstein_MC_MobilePush_Scores data extension stores Einstein Engagement Scoring for MobilePush metrics. Scoring metrics are updated weekly.

⚠️ **Warning:** Don't delete or modify the data extensions named Einstein_MC_Predictive_Scores and Einstein_MC_MobilePush_Scores.

Einstein_MC_MobilePush_Scores Fields include:

- SubscriberKey (255 character max string)
- AppID (255 character max string)
- DirectOpenScore (0-1)
- DirectOpenLevel (Most Likely, More Likely, Less Likely, Least Likely)
- InferredOpenScore (0-1)
- InferredOpenLevel (Most Likely, More Likely, Less Likely, Least Likely)
- PredictedSessionsScore (Integer)
- PredictedSessionsLevel (Most Engaged, More Engaged, Less Engaged, Least Engaged)
- PredictedTimeInApp (Time in Seconds)
- PredictedTimeInAppLevel (Most Engaged, More Engaged, Less Engaged, Least Engaged)
- EngagementScore (0-1)
- EngagementPersona (Most Engaged, More Engaged, Less Engaged, Least Engaged)
- UpdatedDate (date)
- CreatedDate (date)

To export the data, find the Einstein_MC_Predictive_Scores data extension in Email Studio or Contact Builder and click **Export**.

📝 **Note:** The SubscriberKey field must be all lowercase.
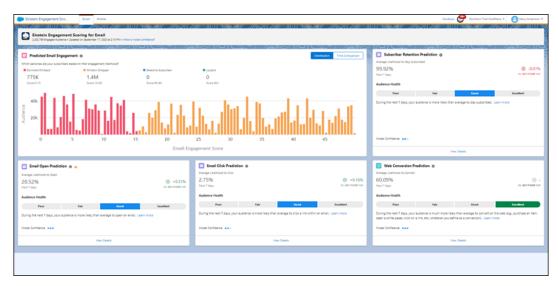
Einstein Engagement Scoring Dashboard

Use the dashboard to view engagement predictions for email and MobilePush channels, including the likelihood to click an email or spend time in a mobile app, and other key performance indicators (KPI). To enable Web Conversion scoring, implement Collect Tracking Code. You can analyze subscriber Persona changes over time.

To access the Einstein Engagement Scoring dashboard, go to Einstein and click **Einstein Engagement Scoring**. Then, click a tab to choose the message channel dashboard to show. On the mobile dashboard, select an app to view predictions.

Each engagement prediction tile displays:

- Activity Prediction: Average likelihood for each engagement metric over the next 7 days
- Change vs Last Week: Change in the average prediction week over week
- Audience Health Indicator: Assessment of audience health for each engagement metric benchmarked against email and mobile industry standards
- Model Confidence Indicator: Relative predictive strength of your subscriber engagement scores

Einstein Engagement Scoring for Email Dashboard

On the email dashboard, get email engagement prediction data that groups contacts into a persona based on engagement thresholds. Use detail pages to dig into prediction specifics and audience health.

Einstein Engagement Scoring for Mobile Dashboard

On the mobile dashboard, predicted app engagement groups contacts into four segments based on engagement thresholds. Thresholds are shown beneath each segment.

Einstein Engagement Scoring Model Confidence

Model confidence is a way to express the relative strength of a prediction generated by a model. Understanding the concept can help you interpret Einstein Engagement Scoring for email model confidence scores.

Einstein Engagement Scoring for Email Dashboard
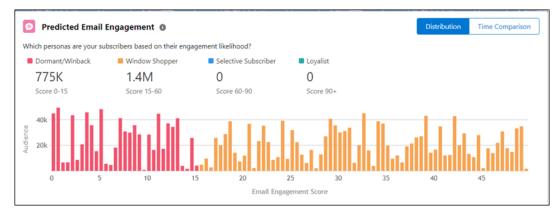
On the email dashboard, get email engagement prediction data that groups contacts into a persona based on engagement thresholds. Use detail pages to dig into prediction specifics and audience health.
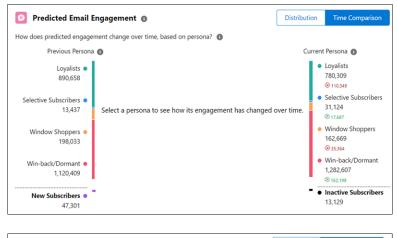
The email engagement heat map groups subscribers into a customer persona based on predicted email engagement.
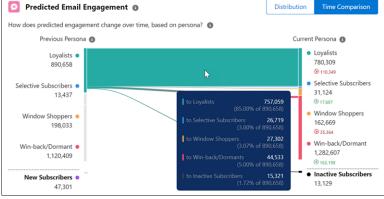
- Loyalists: Subscribers with high open and click engagement
- Window Shoppers: Subscribers with high open and low click engagement
- Selective Subscribers: Subscribers with low open and high click engagement
- Winback/Dormant: Subscribers with low open and click engagement

📝 **Note:** Einstein Engagement Scoring still considers opens, but they're weighted lower than clicks by Einstein's AI models. Open data is important to determine who, for example, is a window shopper versus a selective subscriber, or what differentiates a loyalist

from a selective subscriber. See Einstein Updates for Email Client Privacy Changes on page 222 for more information about Einstein's AI models regarding open-rate scoring.

To show subscriber Persona changes over time, clickTime Comparison. Use this feature to analyze how your messaging is resonating with your subscribers. For example, if your total number of subscribers increased by 10,000 since the last period, the Loyalist bucket increases by 5,000 and shows that 70% come from your Selective Subscriber persona bucket. Einstein Engagement Scoring requires at least 14 days of active subscriber evaluation in each business unit before you can view Persona changes over time.
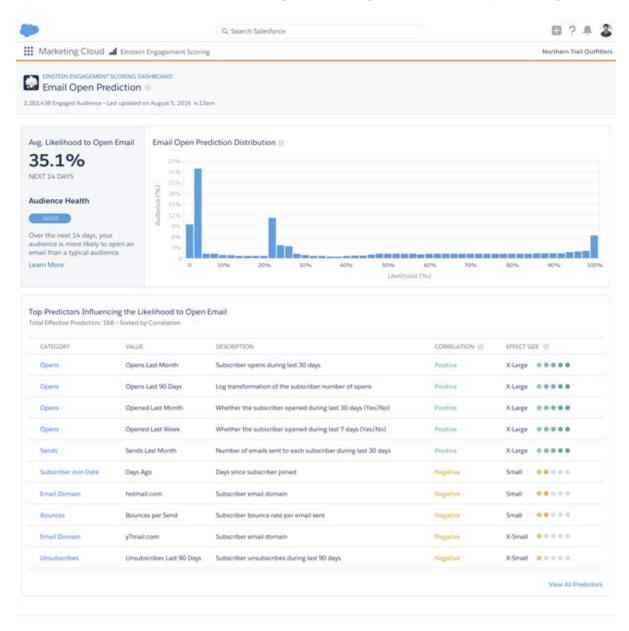
On the email dashboard, click **View Details** in a tile to view its engagement Key Performance Indicator (KPI) detail page. The engagement KPI detail pages show:

- Activity Prediction: Average likelihood of each engagement metric during the next 7 days
- Audience Health Indicator: Audience health for each engagement metric benchmarked against email industry standards
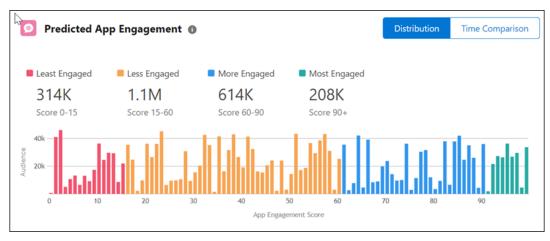
- Activity Prediction Histogram: Distribution of subscribers based on likely engagement during the next 7 days
- Top Predictors: List of predictors used in the data learning model according to size of influence and positive or negative correlation
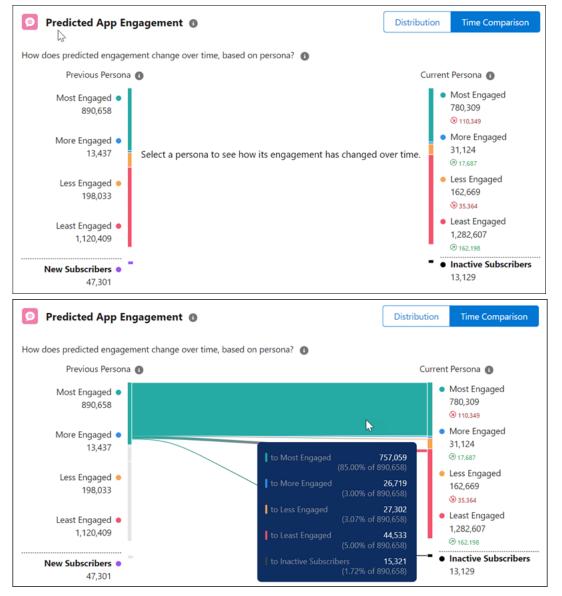
Einstein Engagement Scoring for Mobile Dashboard

On the mobile dashboard, predicted app engagement groups contacts into four segments based on engagement thresholds. Thresholds are shown beneath each segment.

The mobile engagement heat map groups contacts into a customer persona based on predicted engagement.

Click the Time Comparison option to show Contact Persona changes over time. Use this feature to analyze how your messaging is resonating with your contacts. For example, if your total number of contacts increased by 10,000 since the last period, you can see that your Most Engaged bucket increased by 5,000 and that 70% of your new Most Engaged contacts are coming from your Less Engaged persona bucket. Einstein Engagement Scoring requires at least 7 days of active contact evaluation in each business unit before you can view Persona changes over time.

- Predicted App Engagement: This prediction is a blended metric that incorporates predicted app sessions, direct opens, inferred open, and time in app to gauge engagement across message and application engagement. You can't customize the weight of each prediction in the score.

- Predicted App Sessions: How many sessions your audience is expected to generate on average.

- Predicted Direct Opens: How often your audience is expected to tap directly on a push notification to open an app on average

- Predicted Inferred Opens: How often your audience is expected to open the application within 24 hours of receiving, but not directly opening a message. You can't customize the 24-hour window, but opens that occur later in the window have less weight in the prediction.

- Predicted Time in App: How much time in app your audience is expected to spend on average

Einstein Engagement Scoring Model Confidence

Model confidence is a way to express the relative strength of a prediction generated by a model. Understanding the concept can help you interpret Einstein Engagement Scoring for email model confidence scores.

Model confidence provides the probability that a random positive sample has a higher probability of being positive than a random negative sample. Marketing Cloud Engagement uses the area under the Receiver Operating Characteristic curve, or a ROC curve, to evaluate the strength of subscriber engagement predictions. Scores are smoothed so they present an even, understandable view of your customer personas.

When model confidence is closer to 1.00, or 100%, there's greater predictive strength for that engagement score. Lower model confidence indicates weaker predictive strength for that engagement score. The closer the confidence is to 0.50, or 50%, the more the model has about the same predictive strength of a coin toss. These ranges are the model confidence thresholds for Einstein Engagement Scoring.

- Excellent: 1.00–0.85
- Good: 0.84–0.75
- Fair: 0.65–0.50
- Poor: < 0.50

Each engagement prediction tile on the dashboard contains a model confidence indicator. The indicator consists of three circles that correspond with the model confidence thresholds:

- Excellent: three filled dots
- Good: two filled dots
- Fair: one filled dot
- Poor: no filled dots

Fair or poor model confidence can indicate insufficient subscriber data. It can also result from a change in email marketing strategy that influences subscriber engagement behaviors.

SEE ALSO:

Engagement Score Thresholds

Each key performance indicator (KPI) in Einstein Engagement Scoring has an Audience Health indicator. This indicator shows whether the average grade for that score across all your subscribers is Excellent, Good, Fair, or Poor.

The grades are equivalent to the likelihoods that are assigned to each subscriber:

- Excellent: Most Likely
- Good: More Likely
- Fair: Less Likely
- Poor: Least Likely

To make that determination, the Audience Health indicator uses score thresholds based on your threshold settings for Einstein Engagement Scoring.

Email

- Local Averages (default)
- Global Averages (alternative default)
- Custom Thresholds

MobilePush

- App's Averages (default)

- Global Averages (alternative default)
- Custom Thresholds

Default averages use your business unit's email or, for MobilePush, the app's own historical performance. It subjectively compares your customers' likely engagement.

For the alternative defaults, Salesforce trains each customer's model using that customer's behavioral data. If a customer opts in to the Global Models feature, they gain a wider pool of probabilistic contact matching using a greater range of training data. Learn more on page 231 about Einstein's Global Models feature in Marketing Cloud Engagement.

Local and global averages replace the industry averages for engagement scoring for email thresholds. The local and global average default settings are optimized for the blended scores that Einstein uses.

SEE ALSO:

Activate Einstein Engagement Scoring

Einstein Engagement Scoring Dashboard

Einstein Engagement Scoring Model Confidence

## Einstein Engagement Scoring Personas

The Einstein Engagement Scoring heatmap groups subscribers into a customer persona based on predicted email engagement.

- Loyalists: Subscribers with high engagement scores.
- Window Shoppers and Selective Subscribers: Subscribers with mid-range engagement scores.
- Winback/Dormant: Subscribers with low engagement scores.

Use personas to refine customer engagement campaigns and journeys. To show subscriber Persona predicted behavior changes over time, click **Time Comparison in Predicted Email Engagement**.

Einstein Engagement Scoring still considers opens, but they're weighted lower than clicks by Einstein's AI models. Open data is important to determine who, for example, is a window shopper versus a selective subscriber, or what differentiates a loyalist from a selective subscriber.

Note: Some email client providers' security updates can result in an email open without user engagement. See the Einstein Updates for Email Client Privacy Changes on page 222 document for more information.

SEE ALSO:

Create an Audience from Einstein Engagement Scores

Create an Audience from Einstein Engagement Scores

Audience Builder offers pre-built Einstein Engagement Scoring dimensions to quickly and easily apply data science models to personalize your marketing campaigns and customer journeys.

1. Create an Audience

   Create an audience from Einstein Engagement Scoring.

2. Configure Exclusion Criteria

   Set exclusion criteria when you create an audience from Einstein Engagement Scoring.

3. Configure Audience Segment Criteria

   To create an audience from Einstein Engagement Scoring, set the audience segment criteria.

4. Publish the Audience

    Publish an audience that was created using Einstein Engagement Scoring. The audience is not available until it is published.

Create an Audience

Create an audience from Einstein Engagement Scoring.

1. Navigate to **Audience Builder** in the app switcher and select **Audience Builder**.

2. Click **Create Audience**.

3. Select Einstein Engagement Scoring in the attribute library.

4. Choose an email goal from the dropdown menu or drag it to the canvas to include the entire contact group.

5. If you want to refine your selection, drag the contact scores you want to include to the canvas area.

6. If you select more than one criteria, repeat steps 4 and 5, and select an operator.

7. Click **Refresh**.
    The audience count field populates.

8. Save.

9. Name your audience, provide a description, and click **Done**.

10. Click **Save**.

    📝 Note: Don't forget to publish the audience so it's available.

Configure Exclusion Criteria

Set exclusion criteria when you create an audience from Einstein Engagement Scoring.

1. To exclude criteria, on the Exclusion tab click **New Exclusion**.

2. Name the exclusion.

3. Drag criteria to be excluded to the canvas.

    To apply advanced exclusion options, complete the Advanced Options tab and click **Done**.

4. Click **Refresh**.

    📝 Note: You can add exclusion criteria to each filtered group within the audience.

Configure Audience Segment Criteria

To create an audience from Einstein Engagement Scoring, set the audience segment criteria.

1. To further segment your new audience, on the Segments tab click **New Segment**.

2. Enter a name for the segment.

3. Drag the segment criteria to the canvas.

    To apply advanced segmentation options, complete the Advanced Options tab and click **Done**.

4. Click **Refresh**.

    You can segment each filtered group within your audience.

Publish the Audience

Publish an audience that was created using Einstein Engagement Scoring. The audience is not available until it is published.

1. Click the Publish tab.

2. Complete the fields under audience type.

3. Select attributes you want to append.

4. To view results, click **Publish Preview**.

5. If needed, change your selections in steps 2 and 3.

   💡 Tip: Delete selections from your canvas by clicking the trashcan icon.

6. Click **Save and Publish.**

7. Click **Save and Exit**.

Einstein Engagement Scoring for Mobile Model Card

The model in this card analyzes each contact's engagement record to assign scores for the contact's likelihood to interact with mobile messaging.

Model Details

The Einstein Engagement Scoring for Mobile model in Marketing Cloud Engagement predicts engagement using training algorithms, parameters, fairness constraints, features, and other applied approaches.

Intended Use

The Einstein Engagement Scoring for Mobile model in Marketing Cloud Engagement is intended for these use cases.

Relevant Factors

These factors are associated with the Einstein Engagement Scoring for Mobile model in Marketing Cloud Engagement.

Metrics

Einstein evaluates and monitors model performance metrics to ensure and improve the quality of the model. These performance measures are associated with the Einstein Engagement Scoring for Mobile model in Marketing Cloud Engagement.

Training Data

You have a customized version of the model that's trained on your data alone, unless you're opted in to use global model data. Data from one Salesforce customer doesn't affect the behavior for another Salesforce customer. While model training happens for each customer on their data, the initial development of the model is validated with a representative set of pilot customers' data.

Ethical Considerations

Review ethical factors associated with the Einstein Engagement Scoring for Mobile model in Marketing Cloud Engagement. To avoid bias and other ethical risks, this model doesn't include demographic data.

Einstein Engagement Scoring for Mobile Model Refresh

Understand the refresh cadence associated with the Einstein Email Engagement Scoring model in Marketing Cloud Engagement.

Model Details

The Einstein Engagement Scoring for Mobile model in Marketing Cloud Engagement predicts engagement using training algorithms, parameters, fairness constraints, features, and other applied approaches.

Person or Organization

Salesforce Einstein for Marketing Cloud Engagement

Model Date and Version

- August 2020
- Minor changes can occur throughout the release
- Major changes can occur and are communicated via release notes

Model Type

Forecasting, Time-series analysis, Clustering

General Information

- Einstein Engagement Scoring for Mobile predicts five types of engagement scores for each individual mobile consumer contact within each customer's apps.

    - Likelihood to tap on a push notification
    - Likelihood of an inferred open
    - Predicted spending time in the app over the next 7 days
    - Predicted app sessions over the next 7 days
    - Predicted overall, aggregated app engagement

- Push direct open cards show the likelihood of your engaged contacts to open an app directly from a push notification. The trend shows the change in average likelihood for the past 7 days.
- Push indirect open cards show the likelihood of your engaged contacts to open an app after receiving a push notification without tapping the app from the push notification. The trend shows the change in average likelihood for the past 7 days.
- The model further classifies each score into one of four categories based on customer-defined thresholds or machine-inferred thresholds.
- The model analyzes an individual contact's historical events and engagement patterns to forecast future engagement scores. More recent behavior and engagement patterns are emphasized more heavily in the predictions.
- The model clusters predicted engagement scores to derive local threshold boundaries to classify contact engagement levels.
- Salesforce trains each org's model using only that customer's app data. If an org opts in to the Global Models feature, they get the benefit of a wider pool of probabilistic contact matching with a greater range of training data.

    Tip: about Einstein Global Models in Marketing Cloud Engagement.

Constraints

- A minimum of 1 push or open event is required for a contact to have prediction scores.

License

Mobile Engagement Scoring is available to use for Marketing Cloud Engagement customers with any of these editions.

- Corporate Edition
- Enterprise Edition

- Enterprise+ Edition

Questions or Comments

Send questions or comments about the model to mce-support@salesforce.com.

Intended Use

The Einstein Engagement Scoring for Mobile model in Marketing Cloud Engagement is intended for these use cases.

Primary Intended Uses

The Einstein Mobile Engagement Scoring model offers five application-specific, predictive engagement scores for each mobile subscriber. These scores help marketers conduct further segmentation or improve targeting on future mobile campaigns and sends.

Out-of-Scope Use Cases

Anything other than the primary use case is out of scope and isn't recommended.

Relevant Factors

These factors are associated with the Einstein Engagement Scoring for Mobile model in Marketing Cloud Engagement.

Model Input

Einstein Engagement Scoring for Mobile analyzes up to 90 days of historical engagement patterns of the subscribers. The engagement history includes these factors.

- Push events and reactions, such as push notifications and taps on push notifications, and associated timestamps
- App engagement behavior, such as app opens and time spent in app, and associated timestamps
- Data and metadata about customer sending patterns, including how campaigns are executed
- Categorization thresholds defined by customers when applicable

The engagement history that Einstein Engagement Scoring for Mobile analyzes excludes these factors.

- Data purchased or collected from third parties
- Demographic data that is typically stored in SFMC as data extensions or subscriber or contact attributes
- Specific content within the push notification template or rendered message body

Model Output

- Up to five types of scores are predicted for each subscriber for each app.
- For each app, the model produces an average score across all subscribers and associated model confidence level.
- The model produces data extensions that contain each subscriber's predicted scores and the corresponding category.
- The model recommends local thresholds based on your data for each score type.

Groups

The model doesn't include demographic data or other data purchased from third-party data providers.

Environment

The model is trained and deployed in the Marketing Cloud Engagement environment.

Metrics

Einstein evaluates and monitors model performance metrics to ensure and improve the quality of the model. These performance measures are associated with the Einstein Engagement Scoring for Mobile model in Marketing Cloud Engagement.

Model Performance Measures

Model performance metrics include metrics like model fitness score (root mean squared error, mean absolute error) and data richness score.

Training Data

You have a customized version of the model that's trained on your data alone, unless you're opted in to use global model data. Data from one Salesforce customer doesn't affect the behavior for another Salesforce customer. While model training happens for each customer on their data, the initial development of the model is validated with a representative set of pilot customers' data.

Ethical Considerations

Review ethical factors associated with the Einstein Engagement Scoring for Mobile model in Marketing Cloud Engagement. To avoid bias and other ethical risks, this model doesn't include demographic data.

Salesforce customers are responsible for their interpretation of results generated by the model. Customers must be aware of any assumptions they make when acting based on scores generated by the model. There can be adverse outcomes in certain circumstances. For example, if the model predicts low engagement, a marketer can simply choose not to send a marketing communication. If that prediction were erroneous, certain audiences or individuals can be excluded from access to benefits or opportunities.

👁 **Example:** The model predicted low engagement for a certain segment, so Phil chooses not to send a marketing communication to that set of customers. But if that prediction was inaccurate, Phil inadvertently caused some customers to miss benefits or opportunities.

Einstein Engagement Scoring for Mobile Model Refresh

Understand the refresh cadence associated with the Einstein Email Engagement Scoring model in Marketing Cloud Engagement.

Scores and Models

Einstein Engagement Scoring scores and models for email are updated approximately weekly. The refresh cadence varies by one to several days based on a customer's individual business unit.

Einstein Engagement Scoring for Email Model Card

The model analyzed in this card predicts five types of engagement scores for each individual consumer contact in each customer's business unit. Predictions include email opens and clicks, subscriber retention, web conversion, and overall engagement.

Model Details

The Einstein Engagement Scoring model in Marketing Cloud Engagement predicts customer engagement with email content using these training algorithms, parameters, fairness constraints, and features.

Intended Use

The Einstein Engagement Scoring model in Marketing Cloud Engagement is intended for these use cases.

Relevant Factors

These factors are associated with the Einstein Engagement Scoring model in Marketing Cloud Engagement.

Metrics

Einstein evaluates and monitors model performance metrics to ensure and improve the quality of the model. These performance measures are associated with the Einstein Engagement Scoring model in Marketing Cloud Engagement.

Training Data

You have a customized version of the model that's trained on your data alone, unless you're opted in to use global model data. Data from one Salesforce customer doesn't affect the behavior for another Salesforce customer. While model training happens for each customer on their data, the initial development of the model is validated with a representative set of pilot customers' data.

Ethical Considerations

Review the ethical factors associated with the Einstein Email Engagement Scoring model in Marketing Cloud Engagement. To avoid bias and other ethical risks, the Einstein Email Engagement Scoring model doesn't include demographic data.

Refresh Cadence

Review the refresh cadence associated with the Einstein Email Engagement Scoring model in Marketing Cloud Engagement.

Model Details

The Einstein Engagement Scoring model in Marketing Cloud Engagement predicts customer engagement with email content using these training algorithms, parameters, fairness constraints, and features.

Person or Organization

Salesforce Einstein for Marketing Cloud Engagement

Model Date and Version

- October 2021
- Minor changes can occur throughout the release
- Major changes can occur and are communicated via release notes

Model Type

Forecasting, Time-series analysis. Classification, Clustering

General Information

Einstein Email Engagement Scoring predicts five types of engagement scores for each individual consumer contact in each customer's business unit. The model further classifies each score into one of four categories based on customer-defined thresholds or machine-inferred thresholds. The model analyzes an individual subscriber's historical events and engagement patterns to forecast future engagement scores. The most recent behavior and engagement patterns are emphasized in the predictions. The web conversion model is a classification model with crafted features based on historical web interaction events. The model clusters predicted engagement scores to derive local threshold boundaries to classify contact engagement levels.

Constraints

A minimum of one email send is required for a contact to have prediction scores.

License

Einstein Email Engagement Scoring is available to Marketing Cloud Engagement customers with any of these editions.

- Corporate Edition
- Enterprise Edition
- Enterprise+ Edition

Questions or Comments

Send questions or comments about the model to mce-support@salesforce.com.

Intended Use

The Einstein Engagement Scoring model in Marketing Cloud Engagement is intended for these use cases.

Primary Intended Uses

The Einstein Email Engagement Scoring model offers five types of application-specific engagement likelihood for each subscriber. This insight gives you a deeper understanding of your subscribers so you can segment further and target better in future campaigns and sends.

Out-of-Scope Use Cases

Anything other than the primary use case is out of scope and not recommended.

Relevant Factors

These factors are associated with the Einstein Engagement Scoring model in Marketing Cloud Engagement.

Model Input

Einstein Email Engagement Scoring analyzes up to 90 days of historical engagement patterns of the subscribers. The engagement history includes these factors.

- Email sends, bounces, and engagement events including open, click, and unsubscribe, and associated timestamps
- User retention and subscription history
- Subscriber web interaction events including view, search, profile, and purchase, with associated timestamps
- Data and metadata about customer sending patterns, including how campaigns are executed
- Categorization thresholds defined by customers when applicable

The engagement history that Einstein Engagement Scoring for Email analyzes excludes these factors.

- Data purchased or collected from third parties
- Demographic data that is typically stored in SFMC as data extensions or subscriber or contact attributes
- Specific content within the email template or rendered email body

Model Output

- Up to five score types are predicted for each subscriber for each business unit.
- For each score type, the model produces a list of important factors with impact levels.
- For each business unit, the model produces an average score across all subscribers and an associated model confidence level.
- The model produces data extensions that contain each subscriber's predicted scores and the corresponding category.
- The model recommends a threshold based on your data that you can use to classify different engagement levels for each score type.

Groups

The model doesn't use demographic data or other data purchased from third-party data providers.

Environment

The model is trained and deployed in the Marketing Cloud Engagement environment.

Metrics

Einstein evaluates and monitors model performance metrics to ensure and improve the quality of the model. These performance measures are associated with the Einstein Engagement Scoring model in Marketing Cloud Engagement.

Model Performance Measures

Model performance metrics include data such as the model fitness score based on the root mean squared error and mean absolute error, and the data richness score.

Training Data

You have a customized version of the model that's trained on your data alone, unless you're opted in to use global model data. Data from one Salesforce customer doesn't affect the behavior for another Salesforce customer. While model training happens for each customer on their data, the initial development of the model is validated with a representative set of pilot customers' data.

Ethical Considerations

Review the ethical factors associated with the Einstein Email Engagement Scoring model in Marketing Cloud Engagement. To avoid bias and other ethical risks, the Einstein Email Engagement Scoring model doesn't include demographic data.

Customers are responsible for interpreting Einstein's insights, and they must be aware of any assumptions that they make when acting based on the model's insights. However, adverse outcomes are possible due to model error.

👁 **Example:** The model predicted low engagement for a certain segment, so Phil chooses not to send a marketing communication to that set of customers. But if that prediction was inaccurate, Phil inadvertently caused some customers to miss benefits or opportunities.

Refresh Cadence

Review the refresh cadence associated with the Einstein Email Engagement Scoring model in Marketing Cloud Engagement.

Scores and Models

Einstein Engagement Scoring scores and models for email are updated weekly. The refresh cadence varies by one to several days based on a customer's individual business unit.

Einstein Engagement Scoring FAQs

Get the answers to frequently asked questions about Einstein Engagement Scoring.

Why isn't Einstein Engagement Scoring automatically enabled in my account?
Not every Marketing Cloud Engagement account is used to market to subscribers via email or the web. For example, some accounts are used for testing, automations, or other channels, such as social or mobile. This ensures that we're scoring the right audiences in an efficient, scalable manner.

Can I limit who has access to Einstein Engagement Scoring?
No, you cannot restrict Einstein Engagement Scoring permissions based on user roles.

Can I Customize the Prediction Model or Algorithm?
No, you cannot customize the models. Scores are smoothed so they present an even, understandable view of your customer personas. The models are automatically tuned on the Einstein Platform.

Can I change the scheduled time for the automations to start?
Yes, however doing so could delay import of updated scores into your account and delay their availability in Audience Builder.

I see an engagement tile for web conversion, but the tile in the app says that this feature isn't enabled. Why?
Web Conversion is enabled for customers who have provisioned Einstein Web Recommendations and have set up the Collect Tracking Code on their websites. If this product is not enabled in your account, contact your account executive for details.

Why isn't Einstein Engagement Scoring automatically enabled in my account?

Not every Marketing Cloud Engagement account is used to market to subscribers via email or the web. For example, some accounts are used for testing, automations, or other channels, such as social or mobile. This ensures that we're scoring the right audiences in an efficient, scalable manner.

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Can I Customize the Prediction Model or Algorithm?

No, you cannot customize the models. Scores are smoothed so they present an even, understandable view of your customer personas. The models are automatically tuned on the Einstein Platform.

Can I change the scheduled time for the automations to start?

Yes, however doing so could delay import of updated scores into your account and delay their availability in Audience Builder.

To change an automation, see Schedule an Automation.

I see an engagement tile for web conversion, but the tile in the app says that this feature isn't enabled. Why?

Web Conversion is enabled for customers who have provisioned Einstein Web Recommendations and have set up the Collect Tracking Code on their websites. If this product is not enabled in your account, contact your account executive for details.

Einstein Messaging Insights

Einstein Messaging Insights alerts you to changes in your marketing performance no matter where you are in Marketing Cloud Engagement. The Einstein notifications badge appears in the header, where it's constantly accessible to let you know how your email sends and journeys perform. When an anomaly occurs, the notifications badge alerts you. Go to the insights hub for more information about quantifying your results.

Einstein monitors the engagement rates (opens, clicks, and unsubscribes) of your email sends, including batch sends and journey sends. When Einstein Messaging Insights finds an anomalously high or low result compared to the expected values, it generates an insight. The insight denotes the anomaly and its context.

👁 **Example:** A marketer at Northern Trail Outfitters created a journey that sends a weekly deals email to customers each Monday. The marketer logs in to Marketing Cloud Engagement after a long holiday weekend, and the Einstein notifications badge shows that insights are waiting. The marketer clicks the badge and insights like the following appear.

High Engagement Rate for Journey "Weekly Deals Email"

18.25% higher than expected

The marketer then clicks the insight to find out more about it.

Now the marketer is aware of over- or under-performing emails, and for batch email sends can understand some of the key underlying factors. Marketers can then calibrate their journeys or sends to make sure that they perform at their peak.

[Set Up Einstein Messaging Insights](#)

Einstein Messaging Insights is turned off by default for all units in an enterprise. Insights that relate to sends or journeys within a business unit are visible to all users in the business unit.

[View Einstein Messaging Insights](#)

Check out recent insights by clicking the Einstein notifications badge that appears in the header. Or navigate to the insights hub to review insights and quantify your email send and journey results with more information.

[The Einstein Messaging Insights Dashboard](#)

See more insights in one place and find out more about each insight on the Einstein Messaging Insights dashboard. Click an insight to access contributing factors that influenced the send's performance.

[Einstein Messaging Insights Model Card](#)

The model in this card analyzes message engagement rates and notifies marketers when anomalies in their marketing performance occur.

Set Up Einstein Messaging Insights

Einstein Messaging Insights is turned off by default for all units in an enterprise. Insights that relate to sends or journeys within a business unit are visible to all users in the business unit.

1. Go to Marketing Cloud Engagement Setup.

2. Click **Einstein**.

3. Click **Einstein Messaging Insights**.

4. Activate Einstein Messaging Insights for your business unit.

> 💡 **Tip:** Keep Messaging Insights off for business units that are used as sandboxes or contain only test data.

View Einstein Messaging Insights

Check out recent insights by clicking the Einstein notifications badge that appears in the header. Or navigate to the insights hub to review insights and quantify your email send and journey results with more information.

1. After logging in, click the Einstein notifications badge in the header.

2. To see more insights and contextual information, click **View All Insights**.

3. To view insights and context directly, go to Einstein and click **Einstein Messaging Insights**.

The Einstein Messaging Insights Dashboard

See more insights in one place and find out more about each insight on the Einstein Messaging Insights dashboard. Click an insight to access contributing factors that influenced the send's performance.

Use the Einstein Messaging Insights dashboard to view and analyze anomalous results after a batch send or journey send. The dashboard shows send-related information, such as Job ID, Date Sent, and Total Delivered. It also clearly shows data about each send and the variable that was identified as an anomaly. Batch sends include factors that Einstein determines can influence send results. Contributing factors appear in sentence format and table format.

- Einstein evaluates each journey and each send once each day to produce insights.

- Emails track events, such as opens and clicks, for many days after sending. Einstein uses the events collected for up to 7 days after an email send to reassess whether the send is an anomaly or not.

- The variables that Einstein Messaging Insights measures for Journey Insights and Batch Send Insights are open rate, click rate, and unsubscribe rate.

Journey Insights

- Rather than analyzing a single journey email against that email's previous performance, Einstein analyzes all email activities in a journey to find anomalies.

- Einstein uses up to 90 days of performance data to measure the rolling average performance of a variable. This average is used as the expected value for the variable that's measured.

- The upper bound on the dashboard is the anticipated maximum performance that Einstein calculates for the variable that's measured. The upper bound is set at a 95% confidence interval above the rolling average.

- The lower bound is the anticipated minimum performance of the variable. The lower bound is set at a 95% confidence interval below this rolling average.

- Journey updates such as activating a new version are indicated by dots on the graph. To find out what kind of update each dot indicates, use the key beside the anomaly graph.

- Top Contributing Factors aren't available for Journey Insights.

Batch Send Insights

- Einstein uses a group of similar sends from within the last 90 days to calculate the average performance of a variable. And Einstein determines the similarity of sends using variables including send size and several other factors.

- The upper bound on the Einstein Messaging Insights dashboard is the anticipated maximum performance that Einstein calculates for the variable that's measured. The upper bound is set at 95% confidence interval above the average performance of the variable for a send of this size.

- The lower bound is the anticipated minimum performance of the variable. The lower bound is set at a 95% confidence interval below the average performance of the variable for a send of this size.

- When multiple insights are found for a single journey or batch send, a number appears next to the insight's title. To view each insight, click the insight's title.

Einstein Messaging Insights Model Card

The model in this card analyzes message engagement rates and notifies marketers when anomalies in their marketing performance occur.

1. Model Details

   The Einstein Messaging Insights model in Marketing Cloud Engagement provides insight about ongoing marketing email campaigns with email content using these training algorithms, parameters, fairness constraints, and features.

2. Intended Use

   The Einstein Messaging Insights model in Marketing Cloud Engagement is intended for these use cases.

3. Relevant Factors

   These factors are associated with the Einstein Messaging Insights model in Marketing Cloud Engagement.

4. Metrics

   Einstein evaluates and monitors model performance metrics to ensure and improve the quality of the model. These performance measures are associated with the Einstein Messaging Insights model in Marketing Cloud Engagement.

5. Training Data

   You have a customized version of the model that's trained on your data alone. Data from one Salesforce customer doesn't affect the behavior for another Salesforce customer. While model training happens for each customer on their data, the initial development of the model is validated with a representative set of pilot customers' data.

6. Ethical Considerations

   Review the ethical factors associated with the Einstein Messaging Insights model in Marketing Cloud Engagement. To avoid bias and other ethical risks, this model doesn't include demographic data. Customers are responsible for interpreting Einstein's insights, and must be aware of any assumptions that they make when acting based on the model's insights.

Model Details

The Einstein Messaging Insights model in Marketing Cloud Engagement provides insight about ongoing marketing email campaigns with email content using these training algorithms, parameters, fairness constraints, and features.

Person or Organization

Salesforce Einstein in Marketing Cloud Engagement

Model Date and Version

- May 2020
- Minor changes can occur throughout the release
- Major changes can occur and are communicated via release notes

Model Type

Regression, Causation analysis, Time-series analysis

General Information

Einstein Messaging Insights is an anomaly detection system that surfaces noteworthy facts about ongoing marketing email campaigns running in Marketing Cloud Engagement. The model can detect and compare campaigns with similar attributes, performance changes over time, and relationship changes between activities for complex orchestration. The model comprises multiple decision tree regression models, time series-based predictions, and graph analytics. Einstein trains each customer's model only using that customer's data.

Constraints

- A minimum of 10 email batches is required to model for batch insights.
- A minimum of 7 days of history is required to model for journey, journey activity, and frequent automation insights.

License

Einstein Messaging Insights is available to Salesforce Marketing Cloud Engagement customers with any of these editions.

- Corporate Edition
- Enterprise Edition
- Enterprise+ Edition

Questions or Comments

Send questions or comments about the model to mce-support@salesforce.com.

Intended Use

The Einstein Messaging Insights model in Marketing Cloud Engagement is intended for these use cases.

Primary Intended Uses

The Einstein Messaging Insights model powers Einstein notifications and the Einstein Messaging Insights dashboard hub. These tools are designed for marketing professionals to see anomalously high or low engagement rates of email sends compared to expected values. The feature notifies marketers of anomalies so that they can further investigate their journeys and email sends.

Out-of-Scope Use Cases

Anything other than the primary use case is out of scope and not recommended. For example, when an anomaly is raised, inferring that related metrics like click-to-open rate (CTOR) are also anomalous isn't an intended use case.

Relevant Factors

These factors are associated with the Einstein Messaging Insights model in Marketing Cloud Engagement.

Model Input

Einstein Messaging Insights analyzes up to 90 days of historical engagement patterns of the Enterprise subscribers. The engagement history includes these factors.

- Email sends, bounces, and engagement events including open, click, and unsubscribe, spam complaints, and associated timestamps
- Data and metadata about customer sending patterns, including how campaigns are executed. This data includes batch sends, Journey Builder sends, and Automation Studio sends, transactional sends, and triggered sends
- Data and metadata about customer sending patterns, including past and future automations running in Automation Studio
- Pre-personalization subject lines are analyzed with unresolved AMPscript
- Email domain

The engagement history that Einstein Messaging Insights analyzes excludes these factors.

- Data purchased or collected from third parties
- Demographic Data, which is typically stored in SFMC as data extensions or subscriber or contact attributes
- Specific content within the email template or rendered email body

Model Output

The Einstein Messaging Insights model outputs these insights for three types of engagement (clicks, opens, and unsubscribes) daily. Each insight is generated based on observed engagement rate and incorporates upper and lower confidence bounds. All insights include an anomaly degree, which measures the severity of the insight's impact.

- Batch insights, which consider anomalous batches sent over the past 7 days.
- Batch insights include top contributing signals with corresponding signal strengths.
- Journey insights, which consider anomalous journeys whose engagement rate is outside of the expected range.
- Journey activity insights, which consider anomalous journeys whose activities' engagement rate's overall change is outside of the expected range.
- Automation insights, which consider anomalous frequent automations whose engagement rate is outside of the expected range.

Groups

The model doesn't include any demographic data or other data purchased from third-party data providers. The model uses engagement data such as opens, sends, and patterns.

Environment

The model is trained and deployed in the Salesforce Marketing Cloud Engagement environment.

SEE ALSO:

Infrastructure and Sub-processors for the Salesforce Marketing Cloud Services

Metrics

Einstein evaluates and monitors model performance metrics to ensure and improve the quality of the model. These performance measures are associated with the Einstein Messaging Insights model in Marketing Cloud Engagement.

Model Performance Measures

We evaluate and monitor model performance metrics to ensure and improve the quality of the model. Model performance metrics include metrics like model fitness score (root mean squared error) and confidence-bound tightness.

Training Data

You have a customized version of the model that's trained on your data alone. Data from one Salesforce customer doesn't affect the behavior for another Salesforce customer. While model training happens for each customer on their data, the initial development of the model is validated with a representative set of pilot customers' data.

SEE ALSO:

   Model Details

Ethical Considerations

Review the ethical factors associated with the Einstein Messaging Insights model in Marketing Cloud Engagement. To avoid bias and other ethical risks, this model doesn't include demographic data. Customers are responsible for interpreting Einstein's insights, and must be aware of any assumptions that they make when acting based on the model's insights.

Einstein Send Time Optimization

Einstein Send Time Optimization (STO) in Marketing Cloud Engagement determines the best time to send a message. Using machine learning, Einstein predicts optimal send times so that a user is more likely to engage with your message.

Einstein Send Time Optimization helps marketers increase email and push notification engagement. Using automated analysis, Einstein determines the best time to send a message to each individual contact. Each week, Einstein uses each contact's latest commercial engagement data to recreate the sending model. The dashboard send count reflects both commercial and transactional sends, although modeling is based only on commercial event data and doesn't include transactional email sends.

The Einstein STO Journey Builder activity sends messages to each contact at the time when that contact is most likely to engage with the message. When Einstein doesn't have enough data to create a model for a contact, the contact receives messages according to a generalized model. The generalized model is derived from sending data in your Enterprise. The Einstein Send Time Optimization dashboard displays analytics that predict future message engagement.

You can use Einstein STO in Automation Studio in a Send Email activity. Einstein gathers data for about 20 factors. It uses machine learning and 90 days of engagement data to determine the best time within the next 24 hours to send an email message to each contact. If your data isn't processing, verify that the required sends are marketing email sends, not operational email sends.

To use this activity, activate Einstein Send Time Optimization for your business unit.

📝 **Note:** Einstein Send Time Optimization is included with Corporate and Enterprise Edition or available as an add-on purchase to Pro Edition. Einstein Send Time Optimization is also available as an add-on to customers with Pro Edition who have Journey Builder. For customers who have purchased a Corporate or Enterprise Edition before 10/27/2017, Einstein Send Time Optimization is available at no additional charge upon execution of an Order Form with Additional Terms. Contact your account representative for details.

Activate Einstein Send Time Optimization

To find out how sending works for subscribers with low data, turn on Einstein Send Time Optimization (STO) in Marketing Cloud Engagement Setup.

Preview Optimal Send Times

Review potential times that Einstein can send messages to the contacts in a data extension. If a data extension has numerous rows, previews are based on sampling data.

Visualize optimal predicted send times for email addresses or contacts in a Marketing Cloud Engagement tenant or for all contacts in a business unit. Find out when subscribers are most likely to engage with your messages and insight about your Enterprise's data quality, which fuels Einstein's predictions.

Check your Enterprise's data quality score for insight about the engagement data that Einstein uses to predict optimal send times. Data quality scores for Einstein Send Time Optimization are generated at the Enterprise level only.

The model in this card analyzes the optimal time to send an email to a subscriber to maximize the probability of the subscriber opening the email.

The model in this card analyzes the optimal time to send a mobile message to maximize a contact's probability of interacting with it. In Marketing Cloud Engagement, Einstein Send Time Optimization for Mobile optimizes notification push time to maximize the overall engagement of mobile apps.

SEE ALSO:

Activate Einstein Send Time Optimization

To find out how sending works for subscribers with low data, turn on Einstein Send Time Optimization (STO) in Marketing Cloud Engagement Setup.

To use this activity, activate Einstein Send Time Optimization for your business unit. In Setup, click **Send Time Optimization**. On the Email tab, click **Activate**. Allow up to 72 hours after activation to complete the data transfer and analysis required to optimize sends through Journey Builder or Automation Studio.

Insufficient Data Option

Einstein can only predict an optimal send time when there's sufficient engagement data about a contact. When there isn't enough data, it's because a contact is new or hasn't engaged. So, STO sends messages according to a general model it creates for sending within your Enterprise.

💡 **Tip:** Except in special circumstances, use this option's default Enterprise setting.

Complete these steps for each business unit where you plan to use the feature. You need at least one push notification app before you turn on STO for push notification.

1. In the Setup app, expand Einstein, and click **Send Time Optimization**.

2. To choose a message channel, click a tab.

3. Click **Activate**.

4. Select the send time that the Einstein STO activity uses when there isn't enough information about a subscriber to determine the optimal send time.

5. Click **Update**.

6. Click **Settings**.

7. Select the time zone that STO presents results in.

EDITIONS

Available to customers with Marketing Cloud Engagement Einstein terms for **Corporate**, **Enterprise**, or **Pro-edition** accounts with the Journey Builder add-on.

👁 **Example:** For example, you're part of a small B2B business unit in an Enterprise that also has a large B2C business unit. The larger B2C business unit's contacts have different optimal send times than B2B customers. The B2C business unit has thousands of contacts. So analyzing all contacts in the Enterprise could potentially skew the Enterprise-level model heavily towards times that are unsuitable for the B2B business unit's contacts. As a solution, the B2B business unit uses the Insufficient Data Option. This option decouples their send times from the personalized send times that the B2C business unit uses.

Preview Optimal Send Times

Review potential times that Einstein can send messages to the contacts in a data extension. If a data extension has numerous rows, previews are based on sampling data.

In most cases, a data extension preview is built within a few minutes. To estimate how long it takes to build the preview, check the progress indicator.

When the data extension that a preview is based on is deleted, the preview is removed from the list 90 days after the extension is deleted.

1. In Marketing Cloud Engagement, select **Einstein**.

2. Click **Einstein Overview**.

3. Click **Preview**.

4. Select a data extension.

5. Set a sending time frame.

6. Click **Done**.
   The preview starts building. You can navigate away while the build is in progress.

7. When the progress indicator shows Complete, click the preview to open the graph.

Refresh a Send Time Preview

After you create a preview of a data extension in Marketing Cloud Engagement, you can refresh it to find out if Einstein's optimal send times have changed.

Delete a Send Time Preview

When a preview is no longer useful, you can delete it from Marketing Cloud Engagement. If you delete a data extension that a preview is based on, the preview is available for 90 days after deletion.

SEE ALSO:

Einstein Send Time Optimization for Journey Builder

Refresh a Send Time Preview

After you create a preview of a data extension in Marketing Cloud Engagement, you can refresh it to find out if Einstein's optimal send times have changed.

If you build a preview while a different preview is building or refreshing, the refresh process stops. When you delete the data extension that a preview is based on, you can't refresh the preview.

1. In Marketing Cloud Engagement, select **Einstein**.

2. Click **Einstein Overview**.

3. Click **Preview**.

4. Click a completed preview to refresh.

5. Click **Refresh**.

The preview starts building. You can navigate away while the build is in progress and return at any time.

6. When the progress indicator reads Complete, click the preview to see a graph showing the optimal sending hours that Einstein identifies for this data extension's contacts.

Delete a Send Time Preview

When a preview is no longer useful, you can delete it from Marketing Cloud Engagement. If you delete a data extension that a preview is based on, the preview is available for 90 days after deletion.

1. In Engagement, select **Einstein**.

2. Click **Einstein Overview**.

3. Click **Preview**.

4. Click a preview to delete.

5. Click **Delete**.

6. Confirm that you want to delete the preview.

Einstein Send Time Optimization Dashboard

Visualize optimal predicted send times for email addresses or contacts in a Marketing Cloud Engagement tenant or for all contacts in a business unit. Find out when subscribers are most likely to engage with your messages and insight about your Enterprise's data quality, which fuels Einstein's predictions.
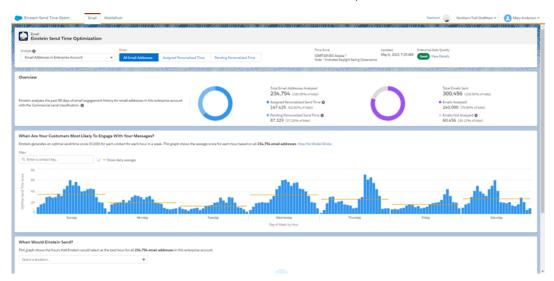
To access the Einstein Send Time Optimization (STO) dashboard, go to **Einstein**, and click **Einstein Send Time Optimization**. Then choose the message channel dashboard you want.

Use the Einstein Send Time Optimization dashboard to view optimal send times by day or by hour. Optimal send times are based on how many contacts are predicted to engage with the message you send. Or view optimal send times across the days and hours in a week. Knowing the optimal send time by hour or day can help you choose the best time for batch sends.

- Total Email Addresses Analyzed shows the total number of contacts in the business unit or unique email addresses in the tenant. On the mobile dashboard, the Total Contacts Analyzed metric shows the same information.

- Assigned Personalized Send Time shows how many contacts or email addresses Einstein can suggest a send time for.

- Pending Personalized Send Time shows how many contacts Einstein needs more data to suggest a send time for. These unmodeled subscribers receive messages according to a generalized model that is derived from sending data in your Enterprise.

- Data Quality shows 1–5 dots, with the filled dots indicating your Enterprise's data quality score for email or mobile sending. Expand the section to access the scores that are considered when generating your data quality score and tips to improve it. Find out more about data quality scores on the Gauge Your Enterprise Data Quality page.

- The When Are Contacts Likely to Engage with Messages section shows the delivery times during the week when contacts are most likely to engage with your messages. Einstein assigns a prediction score to each email address or mobile contact. Einstein gives a 0–100 probability score for all 168 hours in a week. The prediction score anticipates the best hour of the week to send to a contact. This chart aggregates the prediction scores that Einstein assigns to each contact. The chart aggregates scores so it can show the single hour-day combination with the highest probability to promote message engagement. To find the optimal send time for a single contact, enter a contact key.

  🛑 **Important:** Searching for the optimal send time for a single contact is available in the Enterprise-level parent business unit only. Users in child business units can't access this data in other business units.

- The When Would Einstein Send section shows the total number or contacts or email addresses in your business unit or Enterprise account. This section also shows the optimal send times by hour for a day or for all days of the week.

- If you update the Enterprise-level Time Zone for Einstein Send Time Optimization in Setup, the updated Time Zone on the Dashboard can take up to a week to appear. The time zone setting for the Enterprise level is separate from the Business Unit time zone. Changing the Business Unit time zone doesn't affect the Einstein Send Time Optimization dashboard time zone.

SEE ALSO:

Gauge Your Einstein Send Time Optimization Data Quality

Gauge Your Einstein Send Time Optimization Data Quality

Check your Enterprise's data quality score for insight about the engagement data that Einstein uses to predict optimal send times. Data quality scores for Einstein Send Time Optimization are generated at the Enterprise level only.

Each Enterprise's data quality score for email is generated by analyzing the Enterprise's engagement data. This analysis determines a send time coverage score and a data richness score. On the Einstein Send Time Optimization (STO) dashboard for mobile, the send time coverage score is replaced with a mobile send coverage score.

In general, to provide recommendations, Salesforce requires at least one engagement event, such as opens or clicks of a commercial email in the past 90 days. When you activate Einstein Send Time Optimization, existing data counts toward the 90 days.

- To determine the send time coverage score and mobile send coverage score, Einstein analyzes the number of hours in a week during which you have at least one send. When your sends are spread across more hours during the week, your send time coverage score is higher. When your sends happen during fewer hours, your send time coverage score is lower.

- To determine the data richness score, Einstein analyzes the amount and quality of engagement data that's used to make predictions for each individual contact. Einstein analyzes only mobile send data to determine the mobile data richness score and only email send data to determine email data richness.

To find your data quality score, navigate to Einstein Send Time Optimization and view the dashboard. To see your scores and tips that can help raise your data quality score, click **Data Quality Score**.

📝 Note: Transactional sends and test sends are excluded when generating your data quality score.

SEE ALSO:

Einstein Send Time Optimization for Email Model Card

Evolve Your Marketing Strategy with Artificial Intelligence

Einstein Send Time Optimization for Email Model Card

The model in this card analyzes the optimal time to send an email to a subscriber to maximize the probability of the subscriber opening the email.

1. Model Details

   The Einstein Send Time Optimization model in Marketing Cloud Engagement maximizes customer engagement using optimal send times for email content using these training algorithms, parameters, fairness constraints, features, and other applied approaches.

2. Intended Use

   The Einstein Send Time Optimization model in Marketing Cloud Engagement is intended for these use cases.

3. Relevant Factors

   These factors are associated with the Einstein Send Time Optimization model in Marketing Cloud Engagement.

4. Metrics

   Einstein evaluates and monitors model performance metrics to ensure and improve the quality of the model. These performance measures are associated with the Einstein Send Time Optimization model in Marketing Cloud Engagement. Customers are responsible for monitoring the accuracy of Einstein Send Time Optimization.

5. Training Data

   You have a customized version of the model that's trained on your data alone, unless you're opted in to use global model data. Data from one Salesforce customer doesn't affect the behavior for another Salesforce customer. While model training happens for each customer on their data, the initial development of the model is validated with a representative set of pilot customers' data.

6. Ethical Considerations

   Before you use Einstein Send Time Optimization in Marketing Cloud Engagement, review the ethical factors associated with the model. To avoid bias and other ethical risks, this model doesn't include demographic data.

7. Refresh Cadence

   Understand the refresh cadence associated with the Einstein Send Time Optimization model.

Model Details

The Einstein Send Time Optimization model in Marketing Cloud Engagement maximizes customer engagement using optimal send times for email content using these training algorithms, parameters, fairness constraints, features, and other applied approaches.

Person or Organization

Salesforce Einstein for Marketing Cloud Engagement

Model Date and Version

- October 2021
- Minor changes can occur throughout the release
- Major changes can occur and are communicated via release notes

Model Type

- Recommendation/Prediction, Latent factor matrix factorization

General Information

- Einstein Send Time Optimization (STO) is the Marketing Cloud Engagement solution to maximize the engagement rate of email sends based on the send time.

- The model chooses the optimal time to send an email to the subscriber to maximize the probability of the subscriber engaging with the message. Because customer sending patterns vary greatly, we developed parameter sets that are best suited for different patterns. During training, a parameter selector determines the set chosen for the particular enterprise. The parameter selector bases its decision on the variation of the sending and engagement patterns over 90 days of history.

- A subscriber who doesn't have at least one engagement event in the past 90 days is designated as pending a personalized send time. The model sends to these subscribers according to the Insufficient Data option that their admin selects in Setup.

  - The Send at Einstein optimal default time option aggregates scores of all your subscribers that have sufficient data, creating a distribution of scores for every hour. Einstein STO then uses this distribution to assign scores randomly to subscribers who lack sufficient data. A subscriber with insufficient data can get any optimal default time, but it's more likely that the subscriber is given an optimal default time with a higher score than a lower score. Randomization prevents each pending subscriber from receiving an email at the same time, which helps avoid sending spikes and helps Einstein STO get better data.

  - The send immediately option means that subscribers who are pending a personalized send time are sent an email immediately when they reach the STO activity.

  - Subscribers with adequate data are assigned a personalized send time. The model sends at one of the top three hours for each subscriber. Einstein STO randomly selects a single hour to send according to the distribution of the top three scores. Randomization allows Einstein STO to constantly monitor which hours can be better for sending and then improve send time selection.

- Salesforce customers have the option to contribute to and benefit from global modeling by opting in or out in Setup.

- - For customers that opt in, global modeling is applied when recommending personalized optimal send times, where other tenants' data can participate in the analysis and modeling process. The global model can use richer information provided by the opted-in data pool while emphasizing the local tenant's characteristics in each individual recommendation.

  - Individual subscribers who already have strong engagement patterns in the local tenant are influenced less by the global model. Conversely, individual subscribers who don't have strong engagement patterns in the local tenant are influenced more by the global model.

  - Customers that opt in contribute data to global modeling. No additional data fields are required for customers using the global model. Contributed data is anonymized and aggregated at both the tenant and contact levels before being used in local orgs. In this way, the STO global model is conducted without sharing personal data, such as email addresses, between tenant instances.

  - For customers that opt out, the customer's model is trained only using that customer's data.

  - Send Time Optimization for Marketing Cloud Account Engagement (formerly Pardot) isn't included in global modeling.

- Einstein STO analyzes the past 90 days of email engagement history of all subscribers within the enterprise (top-level tenant in SFMC Email Studio).

Licenses

Einstein Send Time Optimization is available to Engagement customers with these editions.

- Corporate Edition
- Enterprise Edition
- Enterprise+ Edition
- Pro Edition with a Journey Builder for Pro Edition SKU
- Einstein Send Time Optimization SKU

Questions and Comments

Send questions and comments about the model to mce-support@salesforce.com.

Intended Use

The Einstein Send Time Optimization model in Marketing Cloud Engagement is intended for these use cases.

Primary Intended Uses

The Send Time Optimization model powers the Einstein Send Time Optimization activity in Journey Builder. Journey Builder is a tool that marketing professionals use to increase effectiveness in their email marketing campaigns.

Out-of-Scope Use Cases

Anything other than the primary use case is out of scope and not recommended. For example, reducing overall send latency for reservation booking emails isn't an intended use case.

SEE ALSO:

[Einstein Send Time Optimization for Journey Builder](#)

Relevant Factors

These factors are associated with the Einstein Send Time Optimization model in Marketing Cloud Engagement.

Model Input

Einstein Send Time Optimization analyzes up to 90 days of historical engagement patterns. The engagement history includes these factors.

- Email sends, bounces, and engagement events including open, click, and unsubscribe, spam complaints, and associated timestamps
- Data and metadata about customer sending patterns, including how campaigns are executed

The engagement history that Einstein STO analyzes excludes these factors

- Data purchased or collected from third parties
- Demographic Data, which is typically stored in SFMC as data extensions or subscriber or contact attributes
- Specific content within the email template or rendered email body
- Transactional emails such as purchase confirmations, password resets, and others aren't included

Groups

The model doesn't include any demographic data or other data purchased from third-party data providers. The model uses engagement data such as Opens, Sends, and patterns.

Environment

The model is trained and deployed in Marketing Cloud Engagement.

SEE ALSO:

[Infrastructure and Sub-processors for the Salesforce Marketing Cloud Services](#)

Metrics

Einstein evaluates and monitors model performance metrics to ensure and improve the quality of the model. These performance measures are associated with the Einstein Send Time Optimization model in Marketing Cloud Engagement. Customers are responsible for monitoring the accuracy of Einstein Send Time Optimization.

Model Performance Measures

Aggregated model performance metrics are gathered to monitor, ensure, and improve the quality of the model. Model performance metrics included the spread and sparsity of input metrics and the correlation of output scores to historical observations. All metrics are aggregated and anonymized.

Training Data

You have a customized version of the model that's trained on your data alone, unless you're opted in to use global model data. Data from one Salesforce customer doesn't affect the behavior for another Salesforce customer. While model training happens for each customer on their data, the initial development of the model is validated with a representative set of pilot customers' data.

For details about global models and training data, see Global Model Data on page 231.

In general, to provide recommendations, Salesforce requires at least one engagement event, such as opens or clicks of a commercial email in the past 90 days. When you activate Einstein Send Time Optimization, existing data counts toward the 90 days.

SEE ALSO:

Model Details

Model Details

Ethical Considerations

Before you use Einstein Send Time Optimization in Marketing Cloud Engagement, review the ethical factors associated with the model. To avoid bias and other ethical risks, this model doesn't include demographic data.

However, biased use of Send Time Optimization can still introduce bias to your marketing process.

👁 **Example:** A Salesforce customer could use Send Time Optimization for everyone except a vulnerable or disadvantaged segment of the population. Content sent to the vulnerable segment isn't send-time-optimized while the rest of the population's content is. This use can cause that segment to be further disadvantaged or miss critical marketing communication.

Refresh Cadence

Understand the refresh cadence associated with the Einstein Send Time Optimization model.

Scores and Models

Einstein Engagement Scoring scores and models for email are updated approximately weekly. The refresh cadence varies by one to several days based on a customer's individual business unit.

Einstein Send Time Optimization for Mobile Model Card

The model in this card analyzes the optimal time to send a mobile message to maximize a contact's probability of interacting with it. In Marketing Cloud Engagement, Einstein Send Time Optimization for Mobile optimizes notification push time to maximize the overall engagement of mobile apps.

1. Model Details

   The Einstein Send Time Optimization model in Marketing Cloud Engagement optimizes customer engagement with email content using these training algorithms, parameters, fairness constraints, features, and other applied approaches.

2. Intended Use

   The Einstein Send Time Optimization for Mobile model in Marketing Cloud Engagement is intended for these use cases.

3. Relevant Factors

   These factors are associated with the Einstein Send Time Optimization for Mobile model in Marketing Cloud Engagement.

4. Metrics

   Einstein evaluates and monitors model performance metrics to ensure and improve the quality of the model. These performance measures are associated with the Einstein Send Time Optimization model in Marketing Cloud Engagement. Customers are responsible for monitoring the accuracy of Einstein Send Time Optimization.

5. Training Data

   You have a customized version of the model that's trained on your data alone. Data from one Salesforce customer doesn't affect the behavior for another Salesforce customer. While model training happens for each customer on their data, the initial development of the model is validated with a representative set of pilot customers' data.

6. Ethical Considerations

   Review the ethical factors associated with the Einstein Send Time Optimization for Mobile model in Marketing Cloud Engagement. To avoid bias and other ethical risks, this model doesn't include demographic data.

7. Refresh Cadence

   Understand the refresh cadence associated with the Einstein Send Time Optimization for Mobile model.

Model Details

The Einstein Send Time Optimization model in Marketing Cloud Engagement optimizes customer engagement with email content using these training algorithms, parameters, fairness constraints, features, and other applied approaches.

Person or Organization

Salesforce Einstein for Marketing Cloud Engagement

Model Date and Version

- December 2020
- Minor changes can occur throughout the release
- Major changes can occur and are communicated via release notes

Model Type

- Recommendation/Prediction, Latent factor matrix factorization

General Information

- In Engagement, Einstein Send Time Optimization for Mobile optimizes notification push time to maximize the overall engagement of mobile apps.
- The model chooses the optimal time to send a push notification to the contact to maximize the probability of the contact engaging with the app. Contacts engage either by tapping on the push notification to open the app or launching the app directly. The model

also detects individual in-app patterns to avoid sending push notifications when contacts are already in the app. A contact can have different optimal send time for different apps.

- We train each customer's model only using that customer's data.

- A contact who doesn't have enough data is part of the Pending Personalized Send Time group. A contact is categorized as not having enough data when there isn't at least 1 open in the past 90 days. For these contacts, the model defaults to send one of two ways based on the Insufficient Data Option that the admin has selected in the STO Setup page.

- The two options are Send at Einstein's optimal default time and Send immediately. When you select Send at Einstein's optimal default time, Einstein aggregates across all of your contacts that do have sufficient data to create a distribution of scores across every hour. Einstein then follows this distribution of scores to randomly assign scores to contacts who don't have enough data. A contact without enough data is randomly assigned an optimal time, but it's more likely that the contact gets a time with a higher score than one with a lower score. This randomization is added so that everyone in the Pending Personalized Send Time group doesn't receive their email at the same time. Randomization helps avoid spikes and helps Einstein get better data.

- Contacts in the Pending Personalized Send Time group are sent a push notification immediately when they reach the STO activity.

Licenses

Einstein Send Time Optimization for Mobile is available to Engagement customers with these editions.

- Corporate Edition
- Enterprise Edition
- Enterprise+ Edition
- Pro Edition with a Journey Builder for Pro Edition SKU
- Einstein Send Time Optimization SKU

Questions and Comments

Send questions and comments about the model to mce-support@salesforce.com.

Intended Use

The Einstein Send Time Optimization for Mobile model in Marketing Cloud Engagement is intended for these use cases.

Primary Intended Uses

The Send Time Optimization model powers the Einstein Send Time Optimization activity in Journey Builder. Journey Builder is a tool that marketing professionals use to increase effectiveness in their mobile marketing campaigns.

Out-of-Scope Use Cases

Anything other than the primary use case is out of scope and not recommended. For example, reducing overall send latency for reservation booking mobile messages isn't an intended use case.

Relevant Factors

These factors are associated with the Einstein Send Time Optimization for Mobile model in Marketing Cloud Engagement.

Model Input

Einstein Send Time Optimization for Mobile analyzes up to 90 days of historical engagement patterns per app. The engagement history includes these factors.

- Push events and reactions, such as push notifications and taps on push notifications, and associated timestamps
- Data and metadata about customer sending patterns and how campaigns are executed

The engagement history that Einstein STO analyzes excludes these factors.

- Data purchased or collected from third parties
- Demographic Data, which is typically stored in SFMC as data extensions or subscriber or contact attributes
- Specific content within the push template or rendered push message body

Groups

The model doesn't include any demographic data or other data purchased from third-party data providers. The model uses mobile engagement data such as Push, TapOpen, AppOpen, or TimeInApp.

Environment

The model is trained and deployed in Marketing Cloud Engagement.

Metrics

Einstein evaluates and monitors model performance metrics to ensure and improve the quality of the model. These performance measures are associated with the Einstein Send Time Optimization model in Marketing Cloud Engagement. Customers are responsible for monitoring the accuracy of Einstein Send Time Optimization.

Model Performance Measures

Aggregated model performance metrics are gathered to monitor, ensure, and improve the quality of the model. Model performance metrics included the spread and sparsity of input metrics and the correlation of output scores to historical observations. All metrics are aggregated and anonymized.

Training Data

You have a customized version of the model that's trained on your data alone. Data from one Salesforce customer doesn't affect the behavior for another Salesforce customer. While model training happens for each customer on their data, the initial development of the model is validated with a representative set of pilot customers' data.

In general, to provide recommendations, Salesforce requires at least one engagement event, such as opens or clicks of a commercial email in the past 90 days. When you activate Einstein Send Time Optimization, existing data counts toward the 90 days.

Ethical Considerations

Review the ethical factors associated with the Einstein Send Time Optimization for Mobile model in Marketing Cloud Engagement. To avoid bias and other ethical risks, this model doesn't include demographic data.

However, biased use of Send Time Optimization (STO) for Mobile can still introduce bias to your marketing process.

👁 Example: A Salesforce customer could use STO for everyone except a vulnerable or disadvantaged segment of the population. Content sent to the vulnerable segment isn't send-time optimized, while the rest of the population's content is. This use can cause that segment to be further disadvantaged or miss critical marketing communication.

Refresh Cadence

Understand the refresh cadence associated with the Einstein Send Time Optimization for Mobile model.

Scores and Models

Einstein Engagement Scoring scores and models for email are updated approximately weekly. The refresh cadence varies by one to several days based on a customer's individual business unit.

Einstein Engagement Frequency

Avoid a lack of awareness from too few messages or burnout from too many messages. Einstein Engagement Frequency in Marketing Cloud Engagement evaluates your contacts and subscribers and identifies the optimal number of email messages to send.

Considerations

Einstein Engagement Frequency (EEF) optimizes the send frequency for each individual contact, maximizing engagement rates and reducing unsubscribes.

- Engagement frequency metrics are derived from the past 28 days' data.
- Only commercial emails are analyzed. Transactional and test sends aren't analyzed.
- A minimum of five frequencies is required, which means that the audience in your business unit must receive at least five variants of your email messaging over a 28-day period. For EEF, a variant is defined as an email sending pattern, which is sending email to subscribers in at least five different intervals.

👁 **Example:** Cheri's a fundraising professional who uses Einstein Engagement Frequency to make sure that she can reach supporters by sending each supporter the optimal number of emails. Cheri has learned that some supporters give only one time, some give regularly, and some give on specific occasions. Some haven't yet donated. She also divides supporters into seven categories according to the size of their contributions.

Each category is put in one of seven paths in a journey. To reach each category of supporters, Cheri sends email to each category on a different day and at a different time. By varying the sending for each category, she creates seven sending variants.

When Cheri analyzes the Einstein Engagement Frequency reports later, she sees message engagement results as expected. And because Einstein makes better predictions when more data is available, she can expect their predictions to become more accurate over time.

👁 **Example:** Hassan, an email marketer, sends a weekly newsletter to his organization's customers. He sends with a journey and uses a data extension that includes all the organization's subscribers as the entry source for each send. The journey includes a Frequency Split activity before the email activity that sends the newsletter. But when Hassan checks the journey's activity analytics, there aren't any results.

That outcome is expected, because Hassan sends only one time per week. Sending infrequent messages to all subscribers together uses only one sending variant. He plans to tweak his communication schedule to meet the minimum of five frequencies.

🔖 **Note:** Einstein Engagement Frequency provides the optimized range for your entire email messaging frequency. This range includes all campaigns and subscribers involved in your email messaging activities.

Activate Einstein Engagement Frequency

Activate Einstein Engagement Frequency (EEF) at the MID level for your account. The activation process can take up to 72 hours to complete. Provision Journey Builder before you use Einstein Engagement Frequency. To use EEF for MobilePush, first provision Journey Builder and create at least one mobile app.

The Einstein Engagement Frequency Dashboard

Use the dashboard to get an overview of sending saturation levels among your contacts. Then analyze the way that your sending frequency affects your contacts' saturation levels. You can review how your sending frequency has affected engagement including opens, clicks, and unsubscribes, over time. Use the What-If analyzer to help maximize your On Target saturation contact levels. See how contacts are performing across all your journeys.

Gauge Your Einstein Engagement Frequency Data Quality

Check your data quality score for insight about the engagement data that Einstein uses to predict your customers' likelihood to engage. Data quality scores for Einstein Engagement Frequency are generated at the business unit level only.

Einstein Engagement Frequency Model Card

The model in this card analyzes each contact's engagement record to determine the optimal frequency at which to send email messages to that contact.

Einstein Engagement Frequency FAQs

Find out how Journey Builder access affects Einstein Engagement Frequency use. And get informed about what happens to your older send frequency data after you upgrade to the latest Einstein Engagement Frequency experience.

Activate Einstein Engagement Frequency

Activate Einstein Engagement Frequency (EEF) at the MID level for your account. The activation process can take up to 72 hours to complete. Provision Journey Builder before you use Einstein Engagement Frequency. To use EEF for MobilePush, first provision Journey Builder and create at least one mobile app.

> 📝 **Note:** If your organization uses Einstein Engagement Frequency before the October 2020 Einstein Engagement Frequency upgrade, activating the updated version of the app removes the Einstein_MC_EMAIL_Frequency_Undersaturation and Einstein_MC_Email_Frequency_Oversaturation data extensions.

1. Navigate to Marketing Cloud Engagement Setup.

2. Click **Einstein**.

3. Click **Einstein Engagement Frequency**.

4. Select the Email or MobilePush tab.

5. Click **Activate Einstein Engagement Frequency**.

6. If you're turning on EEF for MobilePush, select the apps to activate.

   a. To deactivate an app, click ▾ and click **Deactivate**.

The Einstein Engagement Frequency Dashboard

Use the dashboard to get an overview of sending saturation levels among your contacts. Then analyze the way that your sending frequency affects your contacts' saturation levels. You can review how your sending frequency has affected engagement including opens, clicks, and unsubscribes, over time. Use the What-If analyzer to help maximize your On Target saturation contact levels. See how contacts are performing across all your journeys.

To access the Einstein Engagement Frequency Dashboard, go to Einstein, and click **Einstein Engagement Frequency**. Click **Email** or **Mobile**. When you click the mobile dashboard, select the app whose analytics you want to see.

Find out how strong your data quality is for email or mobile engagement frequency. Click **View Details** at the top of the dashboard for data quality scores and tips to improve.

> **Note:** When one or more contacts don't have enough data for Einstein to assign a frequency score, Einstein assigns the score according to global model data. In this case, analytics on the Einstein Engagement Frequency dashboard sometimes don't match activity-level analytics in a journey.

What-If Analyzer

Test future saturation levels corresponding to message frequency using the What-If Analyzer on the Einstein Engagement Frequency dashboard. The goal is to maximize the On Target contacts in your business unit. Use the bar chart to predict how many contacts you can move from Saturated or Undersaturated to On Target.

What-If Analyzer

Test future saturation levels corresponding to message frequency using the What-If Analyzer on the Einstein Engagement Frequency dashboard. The goal is to maximize the On Target contacts in your business unit. Use the bar chart to predict how many contacts you can move from Saturated or Undersaturated to On Target.

Choose one of the dropdown menu options, and use the bar graph to view scenarios. Based on a 7-day outlook, Einstein Insight recommends the optimal number of messages to send to move contacts to On Target. Click the graph bars for details including the number of contacts in each saturation level based on the number of messages for the bar you chose. The number of messages on the bar is the number of messages to send to the source segment you selected in the dropdown. For example, if you chose Undersaturated to On Target, the number on the bar graph indicates the number of messages to send to the Undersaturated contacts.

> **Example:** You want to determine how many messages to send to your Undersaturated contacts to move them to On Target. Einstein recommends sending three more messages within 7 days of the last update. For comparison, you click other message numbers in the bar graph to see the projected results. After you determine the optimal number of messages to send, add a frequency split in the journey and add the optimal number of messages.

Gauge Your Einstein Engagement Frequency Data Quality

Check your data quality score for insight about the engagement data that Einstein uses to predict your customers' likelihood to engage. Data quality scores for Einstein Engagement Frequency are generated at the business unit level only.

Each business unit's data quality score for email is generated by analyzing the business unit's engagement data. This analysis determines a Frequency Density score and an Engagement Frequency Rate score.

- To determine the Frequency Density score, Einstein analyzes the different cadences of sending frequencies in your business unit, comparing the areas of highest concentration of this business unit's sending frequencies to the maximum sending frequency in your account. When you send messages to different customer segments at different cadences, you create a variety of send frequencies. To generate engagement frequency scores send to at least five customer segments.

- To determine the Engagement Frequency Rate score, Einstein analyzes how often contacts in your business unit engage with a message that's part of a distinct sending frequency. Einstein compares this rate to the number of sending frequencies that the same contact has experienced. This score helps Einstein understand how your contacts engage with emails across different sending frequencies.

To find your data quality score, navigate to the Einstein Engagement Frequency dashboard. To see your scores and tips that can help raise your data quality score, click **Data Quality Score**.

> ✏️ **Note:** Transactional sends and test sends are excluded when generating your data quality score.

Einstein Engagement Frequency Model Card

The model in this card analyzes each contact's engagement record to determine the optimal frequency at which to send email messages to that contact.

1. Model Details

   The Einstein Engagement Frequency model in Marketing Cloud Engagement optimizes the frequency of customer engagement with email content using these training algorithms, parameters, fairness constraints, and features.

2. Intended Use

   The Einstein Engagement Frequency model in Marketing Cloud Engagement is intended for these use cases.

3. Relevant Factors

   These factors are associated with the Einstein Engagement Frequency model Marketing Cloud Engagement.

4. Metrics

   Einstein evaluates and monitors model performance metrics to ensure and improve the quality of the model. These performance measures are associated with the Einstein Engagement Frequency model.

5. Training Data

   You have a customized version of the model that's trained on your data alone. Data from one Salesforce customer doesn't affect the behavior for another Salesforce customer. While model training happens for each customer on their data, the initial development of the model is validated with a representative set of pilot customers' data.

6. Ethical Considerations

   Review ethical factors associated with the Einstein Engagement Frequency model in Marketing Cloud Engagement. To avoid bias and other ethical risks, the Einstein Engagement Frequency model doesn't include demographic data.

7. Refresh Cadence

   Review the refresh cadence associated with the Einstein Email Engagement Frequency model in Marketing Cloud Engagement.

Model Details

The Einstein Engagement Frequency model in Marketing Cloud Engagement optimizes the frequency of customer engagement with email content using these training algorithms, parameters, fairness constraints, and features.

Person or Organization

Salesforce Einstein for Marketing Cloud Engagement

Model Date and Version

- May 2020
- Minor changes can occur throughout the release

- Major changes can occur and are communicated via release notes

Model Type

Matrix factorization, Recommendation system

General Information

Einstein Engagement Frequency (EEF) helps marketers determine the right number of emails to send to individual subscribers of an organization, reducing the unsubscribes that result from email fatigue. Marketers can use EEF to identify opportunities to further engage subscribers with emails. The model analyzes individual subscribers' historical engagement patterns over different frequencies. And it uses data of other users with similar patterns to help complete and adjust the scoring of each frequency. The ideal frequency range of each individual is then calculated based on those scores to help find the best frequency band that maximizes engagement. Salesforce trains each customer's model using only that customer's data.

Constraints

- A minimum of 10 subscribers is required to model for engagement frequency.
- A minimum of five frequencies is required to model for engagement frequency. The audience in your business unit must receive at least five variants of your email messaging over a 28-day period. For EEF, a variant is defined as an email sending pattern, which is sending email to subscribers with at least five different intervals.

License

Einstein Engagement Frequency is available to Marketing Cloud Engagement customers with any of these editions.

- Corporate Edition
- Enterprise Edition
- Enterprise+ Edition

Questions or Comments

Send questions or comments about the model to mce-support@salesforce.com.

Intended Use

The Einstein Engagement Frequency model in Marketing Cloud Engagement is intended for these use cases.

Primary Intended Uses

The Einstein Engagement Frequency model powers the Frequency split activity in Journey Builder. The Frequency split activity is designed for marketing professionals to send the optimal number of emails to every subscriber in their business unit, reducing subscriber email fatigue. The feature predicts the optimal number of emails to send an individual contact, maximizing their engagement rate, across all campaigns, and email types, within a business unit.

Out-of-Scope Use Cases

Anything other than the primary use case is out of scope and not recommended. For example, prioritizing which emails to send to subscribers based on their current saturation level, and manually capping the email send frequency per campaign aren't intended use cases.

Relevant Factors

These factors are associated with the Einstein Engagement Frequency model Marketing Cloud Engagement.

Model Input

Einstein Engagement Frequency analyzes up to 90 days of historical engagement patterns of the subscribers. The engagement history includes these factors.

- Email sends, bounces, and engagement events including open, click, and unsubscribe, spam complaints, and associated timestamps
- Data and metadata about customer sending patterns, including how campaigns are executed

The engagement history that Einstein Engagement Frequency analyzes excludes these factors.

- Data purchased or collected from third parties
- Demographic Data, which is typically stored in SFMC as data extensions or subscriber or contact attributes
- Specific content within the email template or rendered email body

Model Output

- A personalized frequency band for each active subscriber and an overall Business Unit–level ideal frequency band for email
- A personalized frequency band for each active subscriber and an overall app-level ideal frequency band for MobilePush

Groups

The model doesn't include demographic data or other data purchased from third-party data providers. The model uses engagement data such as opens, sends, and patterns.

Environment

The model is trained and deployed in the Marketing Cloud Engagement environment.

SEE ALSO:

    [Infrastructure and Sub-processors for the Salesforce Marketing Cloud Services](#)

Metrics

Einstein evaluates and monitors model performance metrics to ensure and improve the quality of the model. These performance measures are associated with the Einstein Engagement Frequency model.

Model Performance Measures

Model performance metrics include metrics like the spread and sparsity of input metrics and the correlation of output scores to historical observations. All metrics are aggregated and anonymized.

Training Data

You have a customized version of the model that's trained on your data alone. Data from one Salesforce customer doesn't affect the behavior for another Salesforce customer. While model training happens for each customer on their data, the initial development of the model is validated with a representative set of pilot customers' data.

SEE ALSO:

Model Details

Ethical Considerations

Review ethical factors associated with the Einstein Engagement Frequency model in Marketing Cloud Engagement. To avoid bias and other ethical risks, the Einstein Engagement Frequency model doesn't include demographic data.

Refresh Cadence

Review the refresh cadence associated with the Einstein Email Engagement Frequency model in Marketing Cloud Engagement.

Scores and Models

Einstein Engagement Frequency scores and models for email are updated weekly. The refresh cadence varies by one to several days based on a customer's individual business unit.

Einstein Engagement Frequency FAQs

Find out how Journey Builder access affects Einstein Engagement Frequency use. And get informed about what happens to your older send frequency data after you upgrade to the latest Einstein Engagement Frequency experience.

To Use Einstein Engagement Frequency's Updated Version, Do I Need Journey Builder?

Yes. Journey Builder must be provisioned in accounts that plan to use the updated Einstein Engagement Frequency app. Find account provisioning information in the Journey Builder Prerequisites.

Does Updating to the New Version of Einstein Engagement Frequency Remove My Old Data?

Yes. Updating the app removes older data used by Einstein Engagement Frequency. Specifically, the two data extensions populated by Einstein Engagement Frequency, called Einstein_MC_EMAIL_Frequency_Undersaturation and Einstein_MC_Email_Frequency_Oversaturation, are deleted. No other data extensions are deleted or modified.

Can Einstein Predict Engagement Frequency on a Segment or Brand Level?

No. Engagement frequency predictions are only available at the contact level for contacts in your business unit.

Are Saturated Contacts Suppressed from Email Sends?

No. Einstein Engagement Frequency identifies segments and groups your contacts by segment, but you control sending. To prevent saturated contacts from receiving unwanted messages, remove or reduce messaging activities in their journey path.

Does Einstein Predict Engagement Frequency for Mobile Products?

Yes. Einstein Engagement Frequency supports email and MobilePush.

To Use Einstein Engagement Frequency's Updated Version, Do I Need Journey Builder?

Yes. Journey Builder must be provisioned in accounts that plan to use the updated Einstein Engagement Frequency app. Find account provisioning information in the Journey Builder Prerequisites.

SEE ALSO:

[Journey Builder Prerequisites](#)

Does Updating to the New Version of Einstein Engagement Frequency Remove My Old Data?

Yes. Updating the app removes older data used by Einstein Engagement Frequency. Specifically, the two data extensions populated by Einstein Engagement Frequency, called Einstein_MC_EMAIL_Frequency_Undersaturation and Einstein_MC_Email_Frequency_Oversaturation, are deleted. No other data extensions are deleted or modified.

SEE ALSO:

[Activate Einstein Engagement Frequency](#)

Can Einstein Predict Engagement Frequency on a Segment or Brand Level?

No. Engagement frequency predictions are only available at the contact level for contacts in your business unit.

Are Saturated Contacts Suppressed from Email Sends?

No. Einstein Engagement Frequency identifies segments and groups your contacts by segment, but you control sending. To prevent saturated contacts from receiving unwanted messages, remove or reduce messaging activities in their journey path.

Does Einstein Predict Engagement Frequency for Mobile Products?

Yes. Einstein Engagement Frequency supports email and MobilePush.

Einstein Copy Insights

Einstein Copy Insights uses text analytics and natural language processing to analyze the text from your commercial email subject lines to uncover language insights. Use these insights to craft subject lines and body copy that drive stronger email engagement.

With the performance tester, you can find out how your subject line is likely to affect a message's engagement rate by comparing it to past subject lines and their engagement rates. You can evaluate a single subject line or compare up to 10 subject lines.

Enable Einstein generative AI to generate, iterate on, test, copy, and download subject lines and body copy in Einstein Copy Insights. Use this feature as a planning tool or whiteboard to brainstorm with your team. You can also create subject lines and body copy directly in Content Builder using generative AI.

In Einstein Copy Insights setup, you can export generative AI data to support your safety compliance efforts. Export comprehensive audits of the past 90 days of generative AI content, including inputs, outputs, and user feedback. Review the audit to ensure alignment with your brand guidelines and consistency across all AI-generated content.

Considerations

Keep these considerations in mind when using Einstein Copy Insights.

Analytics

- Einstein Copy Insights assesses a 90-day rolling window of email engagement data to produce insights.
- Einstein Copy Insights are updated one time each week.
- Insights are based on email engagement rates.
- To populate the model, Einstein Copy Insights requires at least 10 different subject lines sent to at least 30 subscribers within a 30-day period. All 10 subject lines must contain the same two- or three-word phrase, for example, "great deal" or "great deal today."

Subject Line Tester

- Einstein Copy Insights assesses a 90-day rolling window of email engagement data to produce insights.
- The subject line tester requires at least 10 different subject lines sent to at least 30 subscribers within a 30-day period. All 10 subject lines must contain the same two- or three-word phrase, for example, "great deal" or "great deal today."
- To use subject line tester, you must opt in to Global Models. Learn more

Generative AI

- You can generate subject lines and body copy in English, French, German, Italian, Japanese, Portuguese, and Spanish.
- Generative AI insights and Emotional Tone insights are available only in English.
- To use Einstein generative AI features in Marketing Cloud Engagement, enable it in Einstein Copy Insights Setup.

Set Up Einstein Copy Insights

When you enable Einstein Copy Insights, all users in the business unit can view the insights. You can also use Einstein generative AI features in Marketing Cloud Engagement. Einstein generative AI isn't enabled by default, even if Einstein Copy Insights is turned on.

View Einstein Copy Insights

To review insights and find the word and phrase combinations that drive better email engagement, navigate to the insights hub.

Subject Line Groups

Einstein analyzes most of your commercial subject lines in order to detect and surface interesting insights and patterns in the language that you use.

Einstein Subject Line Tester Model Card

The model in this card analyzes and evaluates contact engagement based on email subject lines.

Subject Line Tester

Find out how your message's subject line is likely to influence message performance. Test the performance of a single message or compare up to 10 subject lines. The Subject Line Tester is available only if you opt in to global models. You can also use the tester to analyze subject lines generated in Einstein Copy Insights if you have Einstein generative AI features enabled.

Creating Content in Einstein Copy Insights Using Einstein Generative AI

Use Einstein to generate subject lines and body copy in messages. Test the likelihood of subject line success, and ideate and iterate with colleagues to land on the perfect message content in your preferred language.

Set Up Einstein Copy Insights

When you enable Einstein Copy Insights, all users in the business unit can view the insights. You can also use Einstein generative AI features in Marketing Cloud Engagement. Einstein generative AI isn't enabled by default, even if Einstein Copy Insights is turned on.

1. Go to Marketing Cloud Setup.
2. Click **Einstein**.
3. Click **Einstein Copy Insights**.
4. Activate Einstein Copy Insights for your business unit.

5. To use generative AI features throughout Marketing Cloud Engagement, enable Einstein Generative AI Features in Einstein Copy Insights Setup.

6. To use your organization's brand identity and personality in AI-generated content, ask your Salesforce admin to configure brand settings on page 221. Branding helps Einstein better tailor the generated content for your organization.

View Einstein Copy Insights

To review insights and find the word and phrase combinations that drive better email engagement, navigate to the insights hub.

1. Click **Einstein**.

2. Click **Einstein Copy Insights**.

> **Note:** Einstein Copy Insights are updated once each week.

Einstein Copy Insights Dashboard

Review insights about the subject lines that your organization's emails use and test subject lines that you plan to include in upcoming messages. See top performing and most used subject lines, as well as insights derived from language factors, emotional tone, and phrases within a subject line.

Einstein Copy Insights Dashboard

Review insights about the subject lines that your organization's emails use and test subject lines that you plan to include in upcoming messages. See top performing and most used subject lines, as well as insights derived from language factors, emotional tone, and phrases within a subject line.

Use the Einstein Copy Insights dashboard to examine several factors relating to your emails' subject lines. If you understand how an email's subject line affects engagement with the email, you can craft more engaging subject lines to increase engagement.

The subject lines and the associated engagement rates and send totals shown sometimes don't match the results that appear in other analytics tools. When Einstein detects similar or identical language, Einstein automatically groups those subject lines together and calculates a single average engagement rate.

Considerations

- Einstein doesn't consider transactional, test, or bounced sends.
- Einstein doesn't consider commercial sends to fewer than 30 subscribers.
- A blank space (___) in a subject line indicates that Einstein has identified and consolidated similar language elements. For example, proper names, offer values, or product names are typically consolidated.
- Analytics are updated weekly.
- The Performance Tester is available only to accounts that opt in to global models.

Dashboard Widget	Description
Subject Line Analytics	Review best performing subject line language sorted by engagement rate or number of associated messages sent.
Language Factor Insights	Find out which qualities in your subject lines spur engagement. These insights include an impact metric to show whether the factor has a positive or negative impact and to what degree this factor impacts engagement.

Dashboard Widget	Description
Emotional Tone Insights	See which emotional tones Einstein finds that your subject line language aligns with and its impact on performance. The size of each emotional tone's circle represents the number of subject lines that include that tone.
Top Performing Phrases	Understand which one-, two-, and three-word phrases in your subject lines make an impression on subscribers. When you select a two- or three-word phrase, only the words that appear consecutively in your subject lines appear.
Most Frequently Used Phrases	See which commonly used phrases in your subject lines prompt engagement and if that engagement is better or worse than the average engagement rate.

> **Tip:** The emotional tone factor labeled FOMO is the acronym for fear of missing out.

Subject Line Groups

Einstein analyzes most of your commercial subject lines in order to detect and surface interesting insights and patterns in the language that you use.

When subject lines across multiple sends are identical or similar, Einstein automatically groups them. Then Einstein calculates a single, unweighted average performance rate to more accurately understand language performance. These grouped subject lines are the primary input data to all of the Einstein Copy Insights models, including those models used to generate language-related insights and performance predictions.

Often there's a correlation between when Einstein detects a similar word or phrase and the AMPscript that's used, but such a correlation isn't guaranteed. Static text isn't always recognized as unique across sends. AI-driven consolidation happens based on the language found, regardless of how the subject line was created, when it was sent, or who received it. Some examples:

- The subject line for sale email is the same for all recipients except for the product or discount value.
- A birthday message is the same for all recipients except for the recipient's name.

AI cosolidates %%firstname%% in Content Builder, but more complex AMPscript strings aren't always consolidated properly.

> **Tip:** When Einstein groups similar subject lines in the Subject Line Analytics widget, the similar words or phrases are indicated with ____. For example, you see Happy Birthday ____.

You can see language with AMPscript and ____ in ECI dashboards for up to 90 days after you activate ECI. ECI doesn't collect fully rendered subject lines until the app is activated. To help decrease the amount of time it takes to create meaningful results, ECI pulls from a blend of rendered subject lines and subject lines as they appear in Marketing Cloud Engagement. Subject lines can include AMPscript.

> **Example:** A marketer for a global charity uses Journey Builder to manage donation follow-up. They refresh content quarterly, using AMPscript like %%=v(@customSubjectLine)=%% in their subject line. The marketer can dynamically use one of these three options based on the type of donation.
>
> - %%firstname%%, your donation counts!
> - Thanks for the donation, %%firstname%%.
> - We love the love

When Einstein evaluates historical subject line performance each of the three options are considered independently, even though they can be part of the same send. For example, consider these engagement rates.

Overall Send Engagement Rate	33%
%%firstname%%, your donation counts!	45%
Thanks for the donation, %%firstname%%	22%
We love the love	31%

The unweighted average engagement rate for the send is 33%. But test subject lines are evaluated against the language and language-specific engagement rates (subject line groups) to determine potential effectiveness.

If the marketer sends a separate one-off email with an identical or similar subject line to one of the three options shown, the subject lines are grouped. Subject lines are represented one time in Einstein Copy Insights.

SEE ALSO:

Create a Content Test

Global Model Data Opt In and Opt Out in Marketing Cloud Engagement

Einstein Subject Line Tester Model Card

The model in this card analyzes and evaluates contact engagement based on email subject lines.

Model Details

The Marketing Cloud Engagement Einstein Subject Line Tester model compares and analyzes subject line options with training algorithms, parameters, fairness constraints, features, and other applied approaches.

Intended Use

The Marketing Cloud Engagement Einstein Subject Line Tester model is intended for these use cases.

Relevant Factors

These factors are associated with the Marketing Cloud Engagement Einstein Subject Line Tester model.

Metrics

Einstein evaluates and monitors model performance metrics to ensure and improve the quality of the model. These performance measures are associated with the Marketing Cloud Engagement Einstein Subject Line Tester model.

Training Data

You have a customized version of the model that's trained using global model data including in-house data and outsourcing data. Data from one Salesforce customer doesn't affect the behavior for another Salesforce customer. Each version of the model uses the global model data associated with optimized sample weights customized for the corresponding customer.

Ethical Considerations

Review the ethical factors associated with the Marketing Cloud Engagement Einstein Subject Line Tester model. To avoid bias and other ethical risks, the Einstein Subject Line Tester model doesn't include demographic data.

Model Details

The Marketing Cloud Engagement Einstein Subject Line Tester model compares and analyzes subject line options with training algorithms, parameters, fairness constraints, features, and other applied approaches.

Person or Organization

Einstein in Salesforce Marketing Cloud Engagement

Model Date and Version

- October 2021
- Minor changes can occur throughout the release
- Major changes can occur and are communicated via release notes

Model Type

- Prediction, Gradient boosted regression trees, Hyper-parameter grid search

General Information

- Einstein Performance Tester for Subject Lines (SLT) is the Salesforce solution to predict email engagement rate based on the subject line content that you provide.
- Analyze a single subject line's performance or compare up to 10 subject lines at once.
- SLT helps customers understand the potential impact of language used in subject lines and improve the overall engagement of their subscribers.
- We use the global data pool due to the limited quantity of data a single customer is likely to have for subject line engagement predictions. We use the global data pool with the customer's own local data to train the model. Because of this global model, even customers who have small data samples can take advantage of the performance tester. Customers can opt in or opt out. If a customer opts in, they contribute to and benefit from global modeling.
- Customer subject line contents vary greatly, so we have an optimal pooling strategy that makes a personalized tradeoff between a customer's local data and global data for each customer. To provide the best predictions for the target customers, we put global data into the model and customize the model. We customize by searching for the hyper-parameters that are best for each customer. The two primary cases are customers with relatively large subject line samples and customers with relatively small subject line samples that still meet sample size requirements. In the first case, local data from the customer can already contain rich insights and patterns. The sample size of the local data can be large enough for modeling. The prediction performance is reasonably good. To improve the model, we retrieve insights from the global data and feed the additional insights to the model. Then, we take advantage of local data that represents the customer best. In this case, local data still dominates the performance of the mode. In the second case, we can retrieve limited insights from their local data and the sample size is small. Therefore, the model trained with the local data yields high prediction error, so we use the global data for help. In this case, global data dominates the model performance.
- The features used to train the model include historical observations and natural language processing (NLP) features. The features can be divided into three levels of extractions; Sentence level, Word level, and Symbol or Character level. Sentence level includes word count, term frequency-inverse document frequency (TD-IDF). Word level includes a call to action, immediacy keyword checker. Symbol or Character level includes emoji, question mark, exclamation marker, and character count.
- See Global Model Data on page 231 in Salesforce Help for more information.

Questions or Comments

Send questions or comments about the model to mce-support@salesforce.com.

Intended Use

The Marketing Cloud Engagement Einstein Subject Line Tester model is intended for these use cases.

Primary Intended Uses

The Performance Tester model helps customers understand the potential impact of language used in subject lines and predict email engagement rates to improve the overall subscriber engagement. Evaluate a single subject line or compare up to 10 subject lines.

Out-of-Scope Use Cases

Anything other than the primary use case is out of scope and not recommended.

Relevant Factors

These factors are associated with the Marketing Cloud Engagement Einstein Subject Line Tester model.

Model Input

Einstein Subject Line Tester analyzes up to 90 days of historical engagement patterns of the subscribers. The engagement history includes these factors.

- Email sends, bounces, and engagement events including open, click, and unsubscribe, spam complaints, and associated timestamps
- Email subject lines

The engagement history that Einstein SLT analyzes excludes these factors.

- Data purchased or collected from third parties
- Demographic Data, which is typically stored in SFMC as data extensions or subscriber or contact attributes

Model Output

- The model produces aggregated engagement data by each subject line and generates the average email effectiveness rate per subject line to train the model.

Groups

The model doesn't include any demographic data or other data purchased from third-party data providers. The model uses engagement data and subject line group data. We use a grouping technique that aggregates similar subject lines to reduce the number of subject lines that occur from personalization. For example, if your subject line is "Happy Birthday, Jane," we ignore the personalized name and use the common subject line text only. This type of aggregation provides a more accurate view of subject line engagement.

Environment

The model is trained and deployed in the Salesforce Marketing Cloud Engagement environment.

Metrics

Einstein evaluates and monitors model performance metrics to ensure and improve the quality of the model. These performance measures are associated with the Marketing Cloud Engagement Einstein Subject Line Tester model.

Model Performance Measures

- Sample size and contribution ratio of in-house data for each customer are gathered to monitor.
- Root mean squared error (RMSE) between predicted and actual engagement rate for each customer is calculated and tracked.
- Correlations of actual rates to historical observations and natural language processing (NLP) extracted features are calculated and displayed in the internal dashboard. The model is retrained and updated with new information mined from the data.

Training Data

You have a customized version of the model that's trained using global model data including in-house data and outsourcing data. Data from one Salesforce customer doesn't affect the behavior for another Salesforce customer. Each version of the model uses the global model data associated with optimized sample weights customized for the corresponding customer.

Ethical Considerations

Review the ethical factors associated with the Marketing Cloud Engagement Einstein Subject Line Tester model. To avoid bias and other ethical risks, the Einstein Subject Line Tester model doesn't include demographic data.

The model uses the global data model. Subject lines are pooled together based on context. By aggregating the data samples across a wide range of customers we aim to ensure a degree of fairness for our customers.

Subject Line Tester

Find out how your message's subject line is likely to influence message performance. Test the performance of a single message or compare up to 10 subject lines. The Subject Line Tester is available only if you opt in to global models. You can also use the tester to analyze subject lines generated in Einstein Copy Insights if you have Einstein generative AI features enabled.

In addition to opting in to global models, the Einstein Copy Insights dashboard and Subject Line Tester require some information before making predictions. Your business unit needs at least 10 subject lines with at least 30 deliveries in the last 90 days before Einstein can provide predictions.

When you evaluate your subject lines using the performance tester, Einstein compares the subject line with most other subject lines sent over the past 90 days. Einstein evaluates the subject lines as they appear in your subscriber's inbox, even if you create and personalize them with AMPscript.

Einstein also tests the subject line for potential bias. Salesforce defines bias as using a person's immutable traits to classify them or market to them. If the subject line contains words flagged as introducing potential bias, you can choose to address them before sending the message.

To help you understand how the predicted performance compares to your own past performance in a business unit, contextual analytics appear after you test a subject line.

A model confidence score of 1–5 indicates Einstein's confidence in the model. A score of five indicates the highest confidence rating.

A data quality score of 1–5 indicates how effectively Einstein is using your subject line data for intended use in engagement prediction. A score of 5 means that your subject lines are effective for the model.

Find out how your message's subject line is likely to influence message performance. Test the performance of a single message or compare up to 10 subject lines.

Test a Subject Line Before You Send

Find out how your message's subject line is likely to influence message performance. Test the performance of a single message or compare up to 10 subject lines.

Einstein evaluates the subject lines as they appear in your subscriber's inbox, and tests the subject line for potential bias.

Interpreting Test Results

To help you understand how the predicted performance compares to your own past performance in a business unit, contextual analytics appear.

1. On the Einstein Copy Insights dashboard, enter a subject line with up to 80 characters in the Performance Tester input field.

2. Click **Test**.
   The Einstein performance prediction and contextual analytics appear, indicating a predicted engagement rate range, most likely engagement rate, and past performance.

3. To see a new prediction, modify the subject line and click **Test**.

   Contextual analytics appear to help you understand how the predicted performance compares to your own past performance within a business unit.

Graphic Indicator	Engagement Rate Factor	Description
Purple dotted line	Average Engagement Rate	Unweighted 90-day average engagement rate (engagement rate mean) of all commercial sends to at least 30 recipients in your business unit
Amber shaded area	Predicted Engagement Rate Range	Distribution of possible engagement rates based on your past sends, global data, and the Einstein model's confidence for your enterprise (EID)
Amber dotted line	Predicted Engagement Rate	Predicted most likely engagement rate
Blue lines	Other subject lines and subject line groups	Performance distribution for subject lines or subject lines groups from the past 90 days

After the contextual analytics, the most impactful language factors appear and show how much they influence the prediction. Use these factors to adjust your subject lines.

🛑 **Important:** Predicted performance factors and guidance are unique for each subject line that you test. Don't generalize the guidance or use it as a standard for best practices.

These factors are used to measure subject line performance. We show the top five most impactful factors for each tested subject line.

- Number of numeric symbols
- Number of emoji symbols

- Ratio of uppercase characters
- How unique and original the subject line is
- Number of question marks
- Number of exclamation marks
- Number of dollar symbols
- Number of percentage symbols
- Number of time-sensitive words and phrases
- The degree of personalization
- Word count
- Character length
- Contains specific keywords

Creating Content in Einstein Copy Insights Using Einstein Generative AI

Use Einstein to generate subject lines and body copy in messages. Test the likelihood of subject line success, and ideate and iterate with colleagues to land on the perfect message content in your preferred language.

Start by entering a key message up to 200 characters in your preferred language, and choose a brand personality. You can also add a sample subject line or copy. Five subject lines or body copy options are created at a time. Select up to three to test, copy, or download.

If you don't like any options, start over and create five new ones. Iterate on your favorite options until you land on the perfect subject line or body copy. Use the subject line and body copy generators as a whiteboard to brainstorm with your team and get fresh ideas.

Generate content in one of these languages. When you generate content in one language and then choose a different language, the content is revised. The language setting defaults to the culture code set in your user preferences.

- English
- French
- German
- Italian
- Japanese
- Portuguese
- Spanish

Einstein generative AI takes your brand identity created by your Salesforce admin in Einstein Copy Insights Setup and the personality that you choose into account. For example, if you want to promote a new line of summer clothing for children, you can choose a playful personality. Or if your target audience is avid hikers, you can choose an adventurous personality. If you don't see a personality option that fits your needs, ask your Salesforce admin to add it in Einstein Copy Insights Setup.

Einstein Content Selection

Einstein Content Selection is a no-code, open-time experimentation tool for personalized content. Because Einstein selects content at open time, it continues to evaluate for winning content while also experimenting to ensure that click-through rates are optimized.

> 💡 **Tip:** Einstein can replace the need for segmenting sends or writing personalization into AMPscript by matching asset attributes to consumer profile information.
>
> Before starting, here are a few key concepts to note.
>
> - Asset catalog—Use the set of images in a catalog in your experiments.

- Asset class—To determine how the images are used, add assets to an asset class. Asset classes are frequently used to determine email template placement, such as the banner, main call to action, or the footer.

- Asset attribute—Categorize your images, personalize your content, and analyze click-through rates using attribute values. For example, an asset attribute called Loyalty_Level has three values: Silver, Gold, and Platinum. When you pair the attribute with consumer profiles, Einstein can match the correct set of experimental images using the customer's loyalty level.

- Selection rule—Set up business rules to align Einstein with your business goals and intentions, such as how frequently content can be reused.

💡 **Tip:** In Setup, turn on **Content Tagging for Einstein Content Selection** to let Einstein automatically tag your images. Einstein Content Tags provide another level of classification for you to identify the best content and whether you have enough content.

Use Case Examples

A marketer for an apparel company uploads a group of product image assets each week. Each product image asset features an item that's on sale that week. The marketer creates an asset class called WeeklySalesAssets and assigns the product image assets to it. The marketer uses StartDate and EndDate to make sure that the latest weekly sale item is shown at open time.

📝 **Note:** To further personalize the product images that appear, the marketer can add asset attributes that identify the sport associated with the apparel. If the subscriber's primary sport is available in their profile information, Einstein Content Selection can show product images on sale that correspond to the customer's interests.
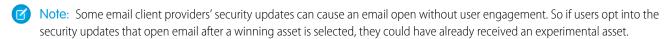
A national grocery store chain decides to use email marketing to distribute weekly coupons. The marketers create an asset class called CouponFeature. Each week, marketers upload image assets for the coupon products. Each image includes the CouponFeature asset class. The marketing team uses StartDate and EndDate to ensure that the assets are available for selection in emails only during the week that they're on sale. The marketers also check Einstein Content Selection analytics to find the week's highest performing assets. They've enabled Einstein Content Tagging to monitor top-performing sale types and discovered that coupons for cleaning products outperformed others. Then they compare the results with sales figures to understand the relationship between the items that customers click and the items that they buy.

Getting Started

Configure a few settings, and supply Einstein with content assets. Import bulk image assets using one of these methods.

- Import an asset catalog file on page 292 that contains metadata and image links that you use in marketing content.

- Use the Einstein Content Selection API.

- Import images from Content Builder or directly from your desktop.

💡 **Tip:** To keep your content fresh, use the API to import images each time a new image is added to your website or product catalog.

Begin sending by adding an Einstein Content Block to an email. Einstein then optimizes asset selection for the highest click-through rate at open time. If you decide to add customer profile information, each email is further customized for the subscriber using the assets that you provide. You can also add content selection and fatigue business rules to help Einstein align with your business goals.

📝 **Note:** Some email client providers' security updates can cause an email open without user engagement. So if users opt into the security updates that open email after a winning asset is selected, they could have already received an experimental asset.

As subscribers engage with your messages, Einstein analyzes click results to find out which assets spark interest in customers. Using real-time analysis, Einstein finds the assets that prompt customers to click a link in the email. As analysis proves that an asset continually contributes to increased click rates, Einstein selects that asset more frequently when customers open their email.

📝 **Note:** Einstein Content Selection consumes super messages in Pro, Corporate, and Enterprise editions. Contact your account executive for more information.

Related Content

📹	Einstein Content Selection
🚶	• Evolve Your Marketing Strategy with Artificial intelligence • Einstein Content Selection Basics • Video: Getting Started with Einstein Content Selection - Einstein Content Selection Overview • Video: Getting Started with Einstein Content Selection - Asset Pool Basics and Content Performance Testing • Video: Getting Started with Einstein Content Selection - Fallback Asset and Fatigue Rules • Video: Getting Started with Einstein Content Selection - Attribute Mapping, Exclusion Rules, and Variety Rules

Set Up Einstein Content Selection

Enable the Einstein Content Selection message block so that you can add it to your messages in Content Builder.

Create and Upload an Asset Catalog File

Give Einstein the images that can be selected as content assets in your messages. Provide an asset catalog .csv file that contains a URL and metadata for each content asset image file that Einstein can select. We provide a template to guide you. You can use Einstein Content Selection in your email messages after uploading assets.

Manage Einstein Content Selection Assets

Manage the asset pool you created on the Asset Pool page after you add assets to Einstein Content Selection. You can add assets to the pool in several ways. Upload an asset catalog file, upload a file from your desktop, import the asset from Content Builder, or add the asset through an API The assets available to you are the image assets that Einstein Content Selection chooses from based on the asset class of the content block. If you're importing profile information, the selection is based on how the image attributes align with the subscriber profile attributes.

Manage Asset Classes

You can add, modify, archive, and restore asset classes.

Sync Your Consumer Profile Data Extension

If your organization has consumer or customer profile data that you want Einstein Content Selection to use when making selections, sync the sendable data extension that contains your customer profile data. When the data extension gets updated, sync it again so Einstein has the latest profile data. Or set up automatic daily profile syncing so you don't have to.

Set Up Content Selection Rules

If you want Einstein Content Selection to observe rules about what content to select, set content selection rules. A content selection rule governs when some assets can and can't be selected and included in a message.

Set Fallback Assets

Choose an image asset that Einstein Content Selection displays when a matching asset can't be found. Pick an image for each asset class in your asset catalog file. Even if your fallback assets are unavailable, Einstein Content Selection selects an image if possible.

Change or Remove a Fallback Asset

If Einstein Content Selection can't find an asset that matches your content selection rules, it displays a fallback image. You can change or remove the fallback image for each asset class.

Find Out Why an Asset Was Selected

Search by subscriber key to review the details of an asset that was selected because of its likelihood to engage a specific subscriber. Find out why Einstein Content Selection didn't select other assets.

Einstein Content Selection Performance Analytics

Discover which aspects of your content images resonate with your audience. View performance over time by asset class, by asset attributes including Einstein's tag and tone attributes, or by job. You can also get details about assets that Einstein doesn't select.

Einstein Content Selection Asset Distribution

Import more assets and keep an eye on your asset inventory's status. Find an overview of assets and their distribution. Monitor how many assets are active or expired, and how many assets expire soon.

Daily Selection and Click Events Report

The daily events report is a summary of subscriber content selection and click events. Use the report in Einstein Content Selection to track subscriber views and engagement. Reports are retained for 90 days.

Use Local Weather Conditions to Target Assets

You can target assets based on the weather forecast and conditions for a subscriber's location. For example, you can promote sunscreen when the UV Index is high or promote raincoats when there's a 75% chance of rain in the next 5 days.

Einstein Content Selection and Testing Model Card

The model in this card analyzes message content performance to optimize email engagement.

Set Up Einstein Content Selection

Enable the Einstein Content Selection message block so that you can add it to your messages in Content Builder.

Before you can use Einstein Content Selection in your messaging, activate the feature in Setup and make it available in all your business units. Upload an asset catalog file that lists the assets that Einstein can use, including each content asset's URL and metadata. Provide a contingency image for cases when your assets or fallback images aren't selectable. To make content selection more sophisticated, you can sync your consumer profile information and set selection rules and fallback images.

1. In Setup, click **Einstein**.

2. Click **Einstein Content Selection**.

3. Click **Activate**.

4. From the dropdown, select how subscribers are identified, either **Subscriber Key** or **Subscriber ID**.

   If necessary, check with the technical marketer or data architect who set up your consumer profile data extension whether to use Subscriber Key or Subscriber ID.

5. To use conversion tracking, select **Track ECS Links**.

   This setting enables links from Einstein Content Selection blocks to pass tracking parameters to a landing page. For more information, see Conversion Tracking.

6. Select an archiving setting for assets.

7. To automatically tag your assets, click **Activate**, and turn on Einstein Content Tagging.

   Einstein Content Tagging tags your images for a deeper classification level. You can see these tags in Performance Analytics as an asset attribute to help identify which types of content work best and whether you have enough content.

   To help Einstein determine which tags to use, set a minimum confidence level and maximum number of tags to apply.

   📝 **Note:** When you turn off automated tagging, tags that Einstein has applied are deleted.

8. To upload an image that appears when your assets aren't available and no fallback images exist, click **Upload Image**.

9. Add the URL that users are directed to when they click your contingency image in a message.

To use the weather feature in Einstein Content Selection, choose the temperature unit, Celsius, or Fahrenheit, to configure temperature-based targeting in the business unit. You must set up a profile sync to detect weather for individual subscribers. You can set up sync at any time. It doesn't prevent you from configuring your assets to support weather targeting. After you enable the weather feature, configure asset classes on page 296 to be weather-enabled.

SEE ALSO:

    Einstein Content Tagging Confidence Level

Create and Upload an Asset Catalog File

Give Einstein the images that can be selected as content assets in your messages. Provide an asset catalog .csv file that contains a URL and metadata for each content asset image file that Einstein can select. We provide a template to guide you. You can use Einstein Content Selection in your email messages after uploading assets.

Download an asset catalog file template. Create an asset catalog file that consists of the required fields in this template and more fields that could help you differentiate assets.

The asset catalog file must include these columns.

AssetName
    A unique identifier for the asset. Must be a text string.

AssetClass
    A group or set of assets that can be selected and displayed interchangeably in a message content block. Asset classes are used to group related images that are commonly used in marketing messages. See the examples on this page. You define each asset class by naming it. Create as many or as few asset classes as you need.

ImageURL
    An internet-accessible URL where a content asset image is stored.

LinkURL
    The URL that you want customers to go to when they click the content asset image in your message.

Available
    A "Y" (yes) value tells Einstein that the content asset image is available for selection. An "N" (no) value means that the content is unavailable for selection. Y and N are the only valid values for this field.

StartDate
    The date after which the asset is eligible to be selected in YYYY-MM-DD format. This value is interpreted to be in GMT. If you don't specify a start date, the start date is set to the current day, and the asset is eligible for selection immediately.

EndDate
    The date after which the asset is no longer eligible to be selected in YYY-MM-DD format. This value is interpreted to be in GMT. If you don't specify an end date, the asset is eligible for selection indefinitely.

Fallback
    A "Y" (yes) value tells Einstein to use this asset as a fallback image when Einstein can't select an image in a given asset class. An "N" (no) value tells Einstein not to use this image as a fallback image. Y and N are the only valid values for this field.

You can add fields to describe your asset image to help the algorithm perform better when selecting a personalized asset. Examples include ProductCategory, Language, Country, or Affinity. Adding these fields creates asset attributes for the image. To use multiple values in an attribute in a bulk asset upload, use a tilde separator in your .csv file. For instance, for the Affinity attribute, Hiking~Camping indicates that the image asset applies to both.

Use asset classes to categorize marketing asset images according to how the images are used in your messages. For example, placement in an email template can be in the banner, the main call to action, the secondary call to action, or the footer.

> 💡 **Tip:** Choose attributes that aid Einstein in selecting assets for your customers specifically. For instance, if your customers are patients in a large public health system, using an extra field, such as PreferredLocation, helps Einstein select image assets that pertain only to the hospital or clinic that each subscriber chooses during enrollment.

1. If you've never before uploaded an asset catalog file, click **Upload File**. If you've already uploaded an asset catalog file, continue to step 2.

2. If you're importing assets to add to your asset pool, or to update assets already in the asset pool, click **New Asset**.

3. Click **Import Assets**.

4. Select your asset catalog file.
   When the asset file upload is complete, a confirmation message appears and more settings are available. You can start using Einstein Content Selection in content blocks when your asset catalog file upload is complete.

> 👁 Example: **Asset Classes**
>
> Use asset classes to categorize marketing asset images according to how the images are used in your messages.
>
> A marketer for a college builds promotional emails for the admissions department. In each email, the institution highlights its upcoming recruiting events. At any time, there are four or five upcoming events. So the marketer creates an asset class called Events for assets that contain information about the college's upcoming recruiting activities.
>
> A marketer for an apparel company uploads a group of product image assets each week. Each product image asset features an item that's on sale that week. The marketer creates an asset class called WeeklySalesAssets and assigns the product image assets to it. The marketer uses StartDate and EndDate to make sure that the latest weekly sale item is shown at open time.
>
> A national grocery store chain decides to use email marketing to distribute weekly coupons. The marketers create an asset class called CouponFeature. Each week, marketers upload image assets for the coupon products. Each image includes the CouponFeature asset class. The marketing team uses StartDate and EndDate to ensure the assets are only available for selection in emails during the week they're on sale. The marketers also check Einstein Content Selection analytics to find the week's highest performing assets. They've enabled Einstein Content Tagging, so the marketers also look for top performing sale types and discover that coupons for cleaning products outperform others. Then they compare the results with sales figures to understand the relationship between items customers click and items they buy.

Additional Fields

Marketers can use additional fields in a variety of ways.

- To use Einstein Content Selection's performance analytics for click-through rates by product, a marketer can create an asset attribute field in the asset catalog called ProductCategory. The field indicates the primary product type the asset image shows.

- To reduce segmentation requirements by language, an additional field called Language could specify the language that text in the asset appears in.

- To target the most relevant content without managing multiple audiences and sends, a marketer can create an additional field for the asset location and name it Country or Locale.

- To show content based on a user's local weather forecast.

Manage Einstein Content Selection Assets

Manage the asset pool you created on the Asset Pool page after you add assets to Einstein Content Selection. You can add assets to the pool in several ways. Upload an asset catalog file, upload a file from your desktop, import the asset from Content Builder, or add the asset through an API The assets available to you are the image assets that Einstein Content Selection chooses from based on the asset class of the content block. If you're importing profile information, the selection is based on how the image attributes align with the subscriber profile attributes.

💡 **Tip:** To make batch changes to your assets, export them in a .csv file, modify the assets, and then import the file. You don't have to include all asset attributes with each update. Include only the values that you're changing.

Enable an asset to make it available so Einstein Content Selection can select it for a message. Disable an asset when you don't want Einstein Content Selection to select it.

💡 **Tip:** To control availability you can also use start and end dates.

1. To access the asset pool in Einstein Content Selection Settings, click **View All Assets**.

2. To create a single asset, import multiple assets, or view file import status, click **New Asset**.

   a. To create a single asset, click **New Asset** again.

   b. To upload an asset catalog .csv file, click **Import Assets**.

   c. To check the file import progress and success or failure status, click **View File Imports**.

   d. To export your assets into a .csv file, click **Export Assets**.

3. To change an asset's metadata, click **Edit**.

4. To view an asset, click its thumbnail image.

Add an Asset

Upload an asset catalog file or use the Einstein Content Selection API to quickly add multiple assets at once. You can also add a single asset. For improved reliability, image size is limited to 2 MB when using the CSV catalog import option or the API. Images added through in the application are still limited to 1 MB.

Add an Asset Attribute

Help Einstein make the best, most context-rich selections by adding attributes to your assets. An attribute is metadata about an asset that helps Einstein categorize it, making selections smarter when paired with subscriber profile information.

Edit Asset Attributes

Update asset attributes so that Einstein's selection incorporates current, relevant metadata. You can add, edit, or delete attribute values.

Archive an Asset

When an image asset isn't available for use, archive it.

Add an Asset

Upload an asset catalog file or use the Einstein Content Selection API to quickly add multiple assets at once. You can also add a single asset. For improved reliability, image size is limited to 2 MB when using the CSV catalog import option or the API. Images added through in the application are still limited to 1 MB.

1. Click **New Asset**.

2. Complete the standard fields and availability settings.

> **Note:** AMPscript isn't accepted in an asset's destination URL, but you can add personalized parameters using Parameter Manager. The parameters set up in Parameter Manager are appended to your destination URL. If you can't use Parameter Manager, see Salesforce Stack Exchange for options.

3. Complete the additional fields.

    The additional fields that appear when you create a single asset are the same additional fields included in the initial asset file.

4. If your org uses Einstein Content Tagging, deselect the automatically generated tags that you don't want to apply.

5. Save the asset.

Add an Asset Attribute

Help Einstein make the best, most context-rich selections by adding attributes to your assets. An attribute is metadata about an asset that helps Einstein categorize it, making selections smarter when paired with subscriber profile information.

1. In Einstein Content Selection Settings, in the Configure Asset Attributes section, click **Edit**.

2. Click **New Attribute**.

3. Name the attribute, and provide attribute values.

    When you select **Allow multiple values from a specified list**, you can supply the values in the text field that appears.

4. If you're using the weather feature, click **Weather Attribute** and choose an attribute type.

    If you don't see the weather attributes, make sure that the weather feature is activated in Setup and that weather attributes are enabled in the asset class.

    *   **Temperature**—Name the value, such as Hot or Chilly, and define its temperature range.
    *   **Precipitation**—Choose the precipitation type, such as Rain or Snow, and define the probability of occurrence.
    *   **Indices**—Choose an index, and define the value of the index. For example, the UV Index is High, or the Air Quality is Good.
    *   **Alarms**—Allows you to select an alarm type for each weather asset. For example, Rain or Snow.

    Weather forecasts use the AccuWeather API. For index and alarm threshold information, see the AccuWeather Daily Index Categories and Level Values and the Weather Alarm Thresholds.

5. Save your work.

    > **Tip:** If you expect to add images daily or weekly, reduce manual work by using the Einstein Content Selection API. Also consider integrating with your website. Then when you add images to your website, they're also added to the asset pool.

Edit Asset Attributes

Update asset attributes so that Einstein's selection incorporates current, relevant metadata. You can add, edit, or delete attribute values.

> **Note:** You can also edit asset attributes by using the Einstein Content Selection API or the Asset Catalog on page 292.

1. In Einstein Content Selection Settings, in the Configure Asset Attributes section, click **Edit**.

2. Click ⌄ next to the asset attribute that you want to edit.

    You can't edit the name of an attribute that's in use.

    When you select **Allow multiple values from a specified list**, you can supply the values in the text field that appears.

3. Name the attribute, and provide attribute values if necessary.

4. Save your work.

Archive an Asset

When an image asset isn't available for use, archive it.

1. Navigate to your organization's assets by clicking **View All Assets**.

2. Find the asset to archive.

3. Click ▾ .

4. Click **Archive**.

Manage Asset Classes

You can add, modify, archive, and restore asset classes.

1. In Einstein Content Selection Settings, in the Configure Asset Classes section, click **Edit**.

2. To create an asset class, click **New Asset Class**, and name and describe the asset class.

   💡 Tip: Create an asset class instead of renaming an existing asset class. Move the assets to the new class, then archive the defunct asset class.

3. If targeting by weather in the asset class and you have Weather enabled for Einstein Content Selection in Setup, follow these steps.

   a. Configure the asset class to be weather-enabled. You can then apply a set of weather-specific asset attributes to the assets in the class.

   b. Choose the behavior to use when a subscriber's location isn't available.

      📝 Note: If you select **Show only assets without weather attribute values** and configure a weather-enabled asset class, you need enough assets without weather attributes in case profile information doesn't include the appropriate location information. If you're using weather only as an additional attribute to refine targeting but it isn't exclusionary, we recommend selecting **Show assets with any weather attribute values**.

   c. Choose the forecast period.

      📝 Note: When forecasted weather includes multiple days, an occurrence on any of the days triggers a selection. If multiple conditions apply during a forecast period, assets with either matching asset attribute apply. When you want to forecast over multiple days and select assets based on a single condition, create an asset attribute for the matching condition only, select **Show only assets without any weather attribute values**. Then, provide several assets without any weather attribute values defined.

4.
   To edit, archive, or restore an asset class, click ▼ next to the asset class.

   a. Select **Archived Asset Classes**.

   b. Click ▾ next to the asset class to restore.

   c. Click **Restore**.

      📝 Note: When you archive asset classes, all fallback image designations are automatically removed and archived.

SEE ALSO:

Einstein Content Selection

Sync Your Consumer Profile Data Extension

If your organization has consumer or customer profile data that you want Einstein Content Selection to use when making selections, sync the sendable data extension that contains your customer profile data. When the data extension gets updated, sync it again so Einstein has the latest profile data. Or set up automatic daily profile syncing so you don't have to.

To access this setting, first upload an asset catalog file.

Consumer profile data attributes are attributes that marketers use to differentiate customers into segments, such as primary product category of interest, favorite brand-related activity, country of residence, or language.

📝 **Note:** Data Extensions stored in the Shared Data Extension Folder can't be selected as a Consumer Profile Data Extension for a child business unit. Only the parent business unit can access Data Extensions stored in the Shared Data Extension Folder for Sync.

1. In Einstein Content Selection Settings, click **Sync Data Extension**.

2. Select the sendable data extension that includes your customer profile data.

   The field length limit is 100 characters.

3. To enable Einstein Content Selection to sync this data extension on a daily schedule, select **Recurring sync**.

   a. Set a schedule, including the time of day your profile data extension sync runs.

4. Click **Save**.

   When the sync completes, its status appears on the Settings page.

🛑 **Important:** When the data extension you selected is updated, repeat this process so Einstein Content Selection can access the latest consumer profile information.

Identify Attributes That Can Introduce Bias

To help you ensure that your customer profile attributes don't facilitate intentional or unintentional bias, Einstein Content Selection scans and flags English language profile attributes that can introduce bias. Einstein scans attribute names and attribute values, then notifies you that an attribute you created can introduce bias so that you can decide whether to include, edit, or exclude the attribute.

Add or Edit Profile Attributes

You can add and edit attribute values.

Identify Attributes That Can Introduce Bias

To help you ensure that your customer profile attributes don't facilitate intentional or unintentional bias, Einstein Content Selection scans and flags English language profile attributes that can introduce bias. Einstein scans attribute names and attribute values, then notifies you that an attribute you created can introduce bias so that you can decide whether to include, edit, or exclude the attribute.

Salesforce defines bias as using a person's immutable traits to classify them or market to them. Because Einstein bases its selections on the profile attributes that you create, it's essential that the attributes you create don't permit or enable harmful bias.

To help you ensure that you don't introduce bias, Einstein Content Selection flags an attribute if that attribute could intentionally or unintentionally introduce bias when used. Attributes are flagged when the attribute itself as a category could contribute to bias or when the attribute's values could contribute to bias.

👁 **Example:** A marketer creates an attribute called postal code. In the United States and other countries, postal codes have historically been used for many purposes, including as an indicator of their residents' race or financial status. For this reason, using a person's postal code as a factor in marketing to them can influence Einstein Content Selection selections unfairly. So postal code is flagged as a potentially sensitive profile attribute.

When an attribute that you create is flagged, Einstein Content Selection still allows you to save and use the attribute. Salesforce customers can use a flagged attribute as a way to ensure that they aren't enabling conscious or unconscious bias. For this reason, the app flags attributes so you can evaluate all the ways that they could be used, then make a responsible decision to keep or discard them.

A guideline that can promote responsible use of attributes is to focus your marketing on behavioral and preferential attributes, not just demographic attributes such as age or gender. Examples of behavioral and preferential attributes include activity preferences and favorited content.

🛑 **Important:** Einstein Content Selection evaluates the attribute names you supply, including synonyms, abbreviations, and formatting in its analysis to detect possible bias. Attributes are scanned against a list of English language attribute names only.

Potentially Sensitive Attributes

The following attribute names are flagged, as are their synonyms, abbreviations, and the formatting consistent with their use in English.

Potentially Sensitive Attributes
First or Last Name
Sexual Orientation
Age
Gender or Gender Identity
Race
Postal Code
Nationality
Religion
Marital Status
Disability
Status as Recipient of Public Assistance
Criminal Convictions
Trade Union Memberships
Medical Condition
Financial Status
Political Opinions
Philosophical Beliefs
Family Status, including pregnancy

Potentially Sensitive Attributes
Genetic Information
Citizenship Status

Add or Edit Profile Attributes

You can add and edit attribute values.

1. In Einstein Content Selection Settings, in the Configure Profile Attributes section, click **Edit**.

2. Click **Manage Attributes**.

3. Select the data extension that includes the profile attribute that you want to add.

4. Click **Next**.

5. Set the notification and sync settings, if necessary.

   💡 **Tip:** You can set the data extension to sync on a recurring schedule.

6. Click **Next**.

7. Select the attribute to add.

8. If weather is enabled, choose the location attributes for the profile.

   📝 **Note:**
   - For a full list of supported countries, see Accuweather's supported locations.
   - Postal codes are fully supported in the United States, Canada, the United Kingdom, and Germany. We recommend you use the city as a backup in countries where the postal codes are only partially supported. This includes Andorra, Argentina, Australia, Austria, Belgium, Brazil, Bulgaria, Croatia, Czech Republic, Denmark, Finland, France, Guatemala, Hungary, India, Italy, Luxembourg, Mexico, Moldova, Netherlands, New Zealand, Norway, Poland, Russia, Slovakia, Slovenia, Spain, Sweden, Switzerland.
   - Provide the location using either City and Postal Code, or Latitude and Longitude coordinates that are supported to the 100th decimal place.
   - You can provide City, State, and Country names in a local language instead of its English equivalent For example, you use the city name København instead of Copenhagen. When using a non-English location name, indicate the language by providing a column in the profile data extension named Language and include the standardized ISO 639-1 language code. In this example, the Language column includes the ISO code NL to indicate the correct language.

9. Click **Next**.

10. If necessary, edit the attribute's values. To define one or more values for this attribute, click **Add Value**.

11. Save your work.

Set Up Content Selection Rules

If you want Einstein Content Selection to observe rules about what content to select, set content selection rules. A content selection rule governs when some assets can and can't be selected and included in a message.

To access this setting, first upload an asset catalog file.

Find Content Selection Rules in Einstein Content Selection Settings. Content Selection Rules include the option to map attributes from your asset catalog file to attributes in your customer profile data extension, set rules about when to exclude an asset, and set rules to keep an asset from showing too often.

1. To get started, click **Edit**.

1. Map Asset Attributes to Consumer Attributes

   To help Einstein make targeted selections, map asset catalog attributes to consumer attributes. If an asset class contains assets in multiple languages, you can specify that only the assets that correspond to the subscriber's language are available to select.

2. Set Fatigue Rules

   Because assets that get clicks and generate engagement guide asset selection, Einstein Content Selection can select the same asset for the same customer more than once. Configure fatigue rules to prevent a customer from seeing the same image more often than you want them to.

3. Set Exclusion Rules

   Exclusion rules are conditions that you set to tell Einstein Content Selection when not to select a particular type of asset for a subscriber.

4. Set a Variety Rule

   Prevent Einstein from selecting the same asset image for an asset attribute more than once for a subscriber in a single message. By setting a variety rule, you can tell Einstein to vary the assets displayed when you use an asset with the same attribute more than once in a message. You can set one variety rule per business unit.

Map Asset Attributes to Consumer Attributes
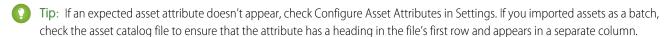
To help Einstein make targeted selections, map asset catalog attributes to consumer attributes. If an asset class contains assets in multiple languages, you can specify that only the assets that correspond to the subscriber's language are available to select.

Ensure that each attribute you use in a Must Match rule can be populated for all subscriber profiles and that assets are available for each possible value.

Guiding Einstein Content Selection using the Must Match option can prevent unintended selections. But using this option can limit the number of available assets that Einstein Content Selection can select. When using Must Match rules, make sure that your account has enough assets to select one for each subscriber.

When using a Must Match rule where an asset attribute value is null or contains an empty string and a corresponding profile attribute is provided, the asset isn't available to select because there's a mismatch. If the asset's value defined in a Must Match rule is omitted, it matches only when the subscriber's profile attribute is also omitted.

In instances where an asset is eligible only to a subset of subscribers but most assets are eligible for everyone, use Exclusion rules on page 301 instead of Must Match rules. For example, use Exclusion rules if one subscriber subset is for people only over age 21. Using Exclusion rules in this case avoids tagging the nonrestrictive assets with values that map to all age groups.

💡 **Tip:** If an expected asset attribute doesn't appear, check Configure Asset Attributes in Settings. If you imported assets as a batch, check the asset catalog file to ensure that the attribute has a heading in the file's first row and appears in a separate column.

1. Click a consumer attribute.

2. Select the attribute from your consumer profile data extension that relates to the asset attribute in the same row.

3. If the asset attribute value must be identical to the subscriber attribute value, select **Must Match**.

   If an asset class contains assets in multiple languages, use this setting to specify that only the assets that correspond to the subscriber's language are available to select. Match the CustomerLanguage asset attribute with the Language consumer profile attribute.

   The Must Match option can prevent unintended selections, but it can limit the number of available assets that Einstein Content Selection can select. When using Must Match rules, make sure that your account has enough assets to select one for each subscriber.

4. To use the Must Match rule when Einstein Content Selection must show a fallback asset, select **Apply to Fallback**.

   The Apply to Fallback option limits the asset pool for your fallback image. To use this feature, make sure that you have a fallback image for each attribute value and consider applying the image to one asset attribute. To access this feature, contact your Salesforce account representative.

5. Repeat these steps for each asset attribute that you want to map.

6. Save the mapping.

👁 Example: Northern Trail Outfitters (NTO), an outdoor adventure apparel company, uploads image assets for a promotion related to the Olympic Games in its asset catalog file. Each image features the flag of the country where the promotion runs. NTO includes another field in the asset catalog file called Country. To ensure that image assets with the correct country's flag appear to subscribers in that country, NTO maps the Country asset attribute to the CustomerCountry field in its consumer profile data extension. Then, NTO selects **Must Match** to tell Einstein Content Selection to select only this asset when the subscriber's country matches the country in the asset attribute value. To manage subscribers who are missing their country profile data, NTO provides a few assets where no value is provided for Country.

SEE ALSO:
   Edit Asset Attributes

Set Fatigue Rules

Because assets that get clicks and generate engagement guide asset selection, Einstein Content Selection can select the same asset for the same customer more than once. Configure fatigue rules to prevent a customer from seeing the same image more often than you want them to.

The default Days After Last Selection, Days After Last Click, and Selection Maximum values appear when you open Einstein Content Selection's fatigue rules. You can change these values.

You can set fatigue rules for all asset classes. Or create a rule for only one asset class at a time.

1. To change the default settings for all asset classes per customer, click a dropdown list.

2. To set a rule for a single asset class, click **Add Rule**.

3. Select an asset class.

4. Choose a value for each dropdown next to the asset class you selected.

5. To create rules for another asset class, repeat these steps.

6. Save the rules and settings you created.

Set Exclusion Rules

Exclusion rules are conditions that you set to tell Einstein Content Selection when not to select a particular type of asset for a subscriber.

1. Click **Add Rule**.

2. Select the asset attribute that contains the value that you want to exclude.

3. Select the value that you want to exclude.

4. Select the consumer attribute that you want to exclude.

5. Select the consumer value that you want to exclude.

6. To add rules, repeat these steps.

7. Click **Save**.

👁 **Example:** Northern Trail Outfitters (NTO), an outdoor adventure apparel company, includes an image asset that shows a coupon offer in its asset catalog file. But NTO's marketers don't want to show a coupon offer to a premium customer who has consistently made large purchases, so NTO creates this exclusion rule.

Don't show assets when:

Asset Attribute = ImageClass, and Asset Value = Coupon AND

Consumer Attribute = LoyaltyLevel, and Consumer Value = Premium

This rule keeps Einstein Content Selection from showing the coupon asset when a customer's LoyaltyLevel attribute's value is Premium.

Example 2

NTO sells an energy drink that it promotes only to adult customers. NTO has a customer profile attribute to indicate whether a customer is 21 years of age or older. When the customer's age isn't known, NTO defaults the profile attribute to under 21 to ensure compliance. NTO creates this exclusion rule.

Don't show assets when:

Asset Attribute = AgeRestricted, and Asset Value = True AND

Consumer Attribute = 21andOver, and Consumer Value = False

This rule keeps Einstein Content Selection from showing the energy drink asset to customers who are under the age of 21 or whose age is unknown.

Set a Variety Rule

Prevent Einstein from selecting the same asset image for an asset attribute more than once for a subscriber in a single message. By setting a variety rule, you can tell Einstein to vary the assets displayed when you use an asset with the same attribute more than once in a message. You can set one variety rule per business unit.

1. Click **Variety**.

2. Select an asset attribute.

3. Save.
    Selections that include this attribute vary.

Set Fallback Assets

Choose an image asset that Einstein Content Selection displays when a matching asset can't be found. Pick an image for each asset class in your asset catalog file. Even if your fallback assets are unavailable, Einstein Content Selection selects an image if possible.

Einstein Content Selection displays a fallback asset when an asset that matches your content selection rules can't be found. For example, a fallback asset is selected when every asset in an asset class has expired.

*   When a fallback asset can't be selected, Einstein Content Selection attempts to select a content asset that fatigue rules would otherwise disallow.

*   When no asset is available even after fatigue rules are bypassed, Einstein Content Selection selects your contingency image.

A card appears for each asset class that Einstein Content Selection finds in the asset catalog file. You can select any asset that is available for each asset class.

1. Click **Select Asset** in a blank card.

2. Select an asset.

3. Save the fallback asset selection.

4. Save the fallback assets you selected.

Change or Remove a Fallback Asset

If Einstein Content Selection can't find an asset that matches your content selection rules, it displays a fallback image. You can change or remove the fallback image for each asset class.

1. In Settings, select **Fallback Assets**.

2. Select an asset class.

3. To use a different fallback asset, select a new asset.

4. To remove a fallback asset and use a contingency image instead, select **Clear All**.

Find Out Why an Asset Was Selected

Search by subscriber key to review the details of an asset that was selected because of its likelihood to engage a specific subscriber. Find out why Einstein Content Selection didn't select other assets.

Use this page to view information about a subscriber and the assets Einstein selected for them. View the subscriber's profile attributes, the email send jobs that sent messages to the subscriber, and the assets that Einstein selected. If an email open event isn't recorded for a subscriber, email send jobs sent to the subscriber are listed, but no assets appear.

> 📝 Note: Some email client providers' security updates can result in an email open without user engagement.

Profile attributes are shown in their current state. Profile attributes can change after Einstein selects an asset.

1. Click **View Selections** in Performance Analytics.

2. Add a subscriber key and search.
A list of emails sent to the subscriber that include the Einstein Content Selection content block appears.

3. Select a send to view the assets evaluated for that subscriber for that send.

4. Click an asset's link for details, including which assets were ineligible for selection and why.

   a. To see its attributes and performance in the Asset Details pane, select an asset.

   > 📝 Note: Clicks refer to the most recent time the subscriber clicked or tapped the asset image, not the other links within the message.

   b. To see the selection and exclusion rules that were configured to guide Einstein's selections in your account, click **Selection Rules** on the Selection Details page.

> 📝 Note: Assets display their current value and can change after selection time.

Einstein Content Selection Performance Analytics

Discover which aspects of your content images resonate with your audience. View performance over time by asset class, by asset attributes including Einstein's tag and tone attributes, or by job. You can also get details about assets that Einstein doesn't select.

To access Einstein Content Selection's performance analytics data, go to Einstein, and click **Einstein Content Selection**. If you use the Einstein Content Selection content block in your messages, selection analytics appear when you click **Performance Analytics**.

Use Einstein Content Selection's analytics to understand which assets are the most and least successful and to review details about selected assets, including which aspects attract clicks. You can look at how assets in an asset class perform across more than one email

send, or how a content block in a particular email is doing. To understand which assets and asset values associated with an asset attribute perform well, sort by asset attribute.

You can select an asset class to view performance for all its assets. To see performance by job ID, search for a particular job by its ID, then select the block in the job that you're interested in.

Pick an asset attribute to see performance for assets with the selected attribute. To find out which aspects of your content assets are getting clicks, select the Tags asset attribute. You can search for and filter by specific tags.

> 💡 **Tip:** Einstein uses predictive AI to analyze and tag the image files according to what's in the image. You can correlate the tag values for aspects or features of the image that are identified by Einstein's tags with selections and clicks. This correlation shows you which aspects of your content are meaningful to your audience.

When the page appears, top-performing assets are sorted by click-to-open ratio (CTOR) by default. If an email open event isn't recorded for a subscriber, then email send jobs sent to the subscriber are listed, but no assets appear.

> 📝 **Note:** Some email client providers' security updates can result in an email open without user engagement.

Use daily reports to get subscriber-level details on selections and click-throughs.

> 💡 **Tip:** If you have additional feature requests related to analytics or automated access to Einstein Content Selection data, share your use case and request by submitting feedback on the Idea Exchange.

View Subscriber Content Selections

View a history of subscriber sends and why a subscriber received certain image selections.

View Subscriber Content Selections

View a history of subscriber sends and why a subscriber received certain image selections.

1. On the Einstein Content Selection page, click the **Performance Analytics** tab.
2. Click **View Selections**.
3. To view the subscriber details, enter the subscriber key in the search box.
4. To see the other images that were selectable at the time and asset details, click the asset name. The asset details show the current settings for the asset. To see details when the asset was selected, expand the asset. Values that are different have an asterisk.

Einstein Content Selection Asset Distribution

Import more assets and keep an eye on your asset inventory's status. Find an overview of assets and their distribution. Monitor how many assets are active or expired, and how many assets expire soon.

To access Einstein Content Selection's asset distribution data, go to Einstein and click **Einstein Content Selection**. If you use the Einstein Content Selection content block in your messages, access distribution analytics by clicking **Asset Distribution**.

Filter by asset class and by attribute to see which assets are available, active, expiring, or expired.

> 💡 **Tip:** Einstein uses predictive AI to analyze and tag the image files according to what's in the image. Select **Tags as the Asset Attribute** to see how each image that Einstein tagged is performing.

Daily Selection and Click Events Report

The daily events report is a summary of subscriber content selection and click events. Use the report in Einstein Content Selection to track subscriber views and engagement. Reports are retained for 90 days.

Performance Analytics that you see on the Einstein Content Selection page are based on the timezone settings for Marketing Cloud Engagement. The daily subscriber report data is based on the UTC timezone. Daily counts can differ between the two. The daily subscriber report usually is available at about 03:00 UTC.

To access the reports, click Daily Reports in Performance Analytics in Einstein Content Selection. Then download a zipped CSV file of the report.

📝 **Note:** You can access this report via API to get this report on other platforms. See the Einstein REST API for developer information.

Table 14: Report Format

Field Name	Description
channel	The channel where the asset's event occurred. Only email is supported.
ImageURL	URL for the hosted image
timestamp	Timestamp for the event. For example, 1970-01-30T18:40:47.000Z
AssetName	Name of the asset
StartDate	The start date defined for the asset. This setting defines the date the asset is available for selection.
LinkURL	The destination URL for the asset.
subscriber_id	Hashed value for the Subscriber ID or Subscriber Key, depending on the profile identifier provided in Setup. For more information, see Setup Einstein Content Selection on page 291.
job_id	The job identifier for the send.
selected_as_fallback	Identifies whether the asset is available to the subscriber as a fallback as TRUE or FALSE. For more information, see Set Fallback Assets on page 302.
EndDate	The end date defined for the asset. This setting defines the last day that the asset is available for selection.
event_type	Selection or click event.
AssetClass	Defines the asset class that the asset is assigned to.
event_date	The date of the selection or click event in YYYY-MM-DD format.

Use Local Weather Conditions to Target Assets

You can target assets based on the weather forecast and conditions for a subscriber's location. For example, you can promote sunscreen when the UV Index is high or promote raincoats when there's a 75% chance of rain in the next 5 days.

To use targeted weather, the profile attributes must include location information, such as city, postal code, state, country, or latitude and longitude. Learn more about supported location information in Manage Profile Attributes on page 299.

Add weather condition attributes to the asset on page 295 in one of four ways.

- Use temperature ranges to differentiate hot versus cold days using the forecasted daytime high.
- Use precipitation ranges to define a chance of any type of precipitation. Or define a precipitation range for a specific type of precipitation, including rain, snow, ice, and thunderstorms.

- Use indices to determine appropriate activities given the forecast. For example, UV Index is High, or Air Quality is Good.
- Set alarms to trigger when a weather condition meets or exceeds a threshold.

The weather service uses the subscriber location information provided in the customer profile data extension to look up forecasted weather conditions and uses metadata on the image asset for targeting purposes. See Sync Your Customer Profile Data Extension on page 297 for more information.

For each asset class, use configuration options to manage the forecast period and how to target subscribers when weather conditions can't be retrieved for the subscriber. See Manage Asset Classes on page 296 for more information.

Disable or Pause the Einstein Content Selection Weather Feature

Disabling the weather feature permanently removes all weather-related metadata. If you don't want to lose your weather-related metadata, you can pause the feature.

Get Started with Weather to Target Assets

Before you can use local weather forecasts and conditions to target assets, complete these setup items.

SEE ALSO:

Accuweather API

Weather Alarm Thresholds

Disable or Pause the Einstein Content Selection Weather Feature

Disabling the weather feature permanently removes all weather-related metadata. If you don't want to lose your weather-related metadata, you can pause the feature.

To disable the weather feature, in Setup, click **Deactivate & Delete**.

To pause the feature, deselect **Weather Enabled** on each asset class. No data is deleted, and you can turn on the weather feature at any time without losing data.

Get Started with Weather to Target Assets

Before you can use local weather forecasts and conditions to target assets, complete these setup items.

1. Enable the **Weather** option in Setup > Einstein >Einstein Content Selection. See Set Up Einstein Content Selection on page 291 for more information.

   An admin must activate weather in Setup. After it's activated, you can choose the temperature unit to use to configure temperature-based targeting in the business unit.

2. Sync customer profiles on page 297 with location information.

3. Identify appropriate Asset Classes as Weather Enabled to show the appropriate asset options. See Manage Asset Classes on page 296 for more information.

4. Create weather-related asset attributes on page 295 in the asset class.

5. Add weather attribute values on page 295 to assets.

Now, you can target assets based on the weather forecast on page 305 and conditions for a subscriber's location. You can disable the weather feature permanently at any time. This action removes all weather-related metadata. If you don't want to lose your weather-related metadata, you can pause the feature instead. See Disable or Pause the Einstein Content Selection Weather Feature on page 306 for more information.

Einstein Content Selection and Testing Model Card

The model in this card analyzes message content performance to optimize email engagement.

Model Details

The Einstein Content Selection and Testing model in Marketing Cloud Engagement optimizes customer engagement with email content using these training algorithms, parameters, fairness constraints, and features.

Intended Use

The Einstein Content Selection and Testing model in Marketing Cloud Engagement is intended for these use cases.

Relevant Factors

These factors are associated with the Einstein Content Selection and Testing model in Marketing Cloud Engagement.

Metrics

Einstein evaluates and monitors model performance metrics to ensure and improve the quality of the model. These performance measures are associated with the Einstein Content Selection and Testing model in Marketing Cloud Engagement. Customers are responsible for monitoring the accuracy of Einstein Content Selection.

Training Data

You have a customized version of the model that's trained on your data alone. Data from one Salesforce customer doesn't affect the behavior for another Salesforce customer. While model training happens for each customer on their data, the initial development of the model is validated with a representative set of pilot customers' data.

Ethical Considerations

Review the ethical factors associated with the Einstein Content Selection and Testing model in Marketing Cloud Engagement. To avoid bias and other ethical risks, this model doesn't include demographic data. Further bias is mitigated by training the model with a robust content catalog.

Model Details

The Einstein Content Selection and Testing model in Marketing Cloud Engagement optimizes customer engagement with email content using these training algorithms, parameters, fairness constraints, and features.

Person or Organization

Salesforce Einstein for Marketing Cloud Engagement

Model Date and Version

- August 2020
- Minor changes can occur throughout the release
- Major changes can occur and are communicated via release notes

Model Type

Reinforcement learning, multi-armed bandit algorithms

General Information

The model measures engagement through the click-to-open rate (CTOR) in real time and selects image content when the email is opened. As more opens occur, Einstein favors top-performing content, but the remaining content is still used at lower rates. In the

multi-armed bandit algorithm, the trade-off of optimizing for the highest-performing content versus continuing to experiment with other content is referred to as "exploiting vs exploring."

Data from each send or journey is a standalone experiment. Assets with the highest CTOR in one experiment are reevaluated in subsequent experiments.

When using the model in a single batch send, stagger the send time to optimize the exploit phase. Einstein collects the most engagement data before new open events. To stagger sends automatically, use Einstein Send Time Optimization.

If a large portion of your audience uses Apple Mail Privacy Protection, Einstein needs a larger amount of email opens before providing the audience engagement data, resulting in a longer exploration phase. The longer phase could negatively impact your engagement rate compared to content sent without Einstein. To counter this effect, stagger your sends.

To personalize content in the Einstein Content Selection catalog, use the profile sync, content metadata, and Must Match attribute rules. These rules narrow which catalog content that an individual can be exposed to in the experiment. If the personalization rules remove content from the experiment, the remaining content that has the highest CTOR is the content to exploit.

Licenses

Einstein Content Selection and Einstein Content Testing are available to Marketing Cloud Engagement customers with these editions.

- Pro
- Corporate
- Enterprise
- Enterprise+

Questions or Comments

Send questions or comments about the model to mce-support@salesforce.com.

Intended Use

The Einstein Content Selection and Testing model in Marketing Cloud Engagement is intended for these use cases.

Primary Intended Uses

- Improve email engagement by experimenting and optimizing for the highest performing content.
- Personalize and manage the selected content using the provided Einstein Content Selection business rules.
- Use a simplified approach for how tested content is selected using Einstein Content Testing. ECT uses the same Einstein algorithm with traditional A/B/n testing, but simplified and without personalization or other business rules to manage how content is selected.

Out-of-Scope Use Cases

- Don't use Einstein Content Selection or Testing for text content in emails or subject line testing because Einstein content runs open-time experiments.
- Don't use Einstein Content Selection or Testing to test top-performing content across different sends or journeys.

Relevant Factors

These factors are associated with the Einstein Content Selection and Testing model in Marketing Cloud Engagement.

Model Input

The Einstein model that powers Content Selection and Content Testing analyzes content performance for each send or journey.

Model Output

Content to display for a given email open event.

Groups

The model doesn't include demographic data or other data purchased from third-party data providers.

Environment

The model is trained and deployed in the Marketing Cloud Engagement environment.

Metrics

Einstein evaluates and monitors model performance metrics to ensure and improve the quality of the model. These performance measures are associated with the Einstein Content Selection and Testing model in Marketing Cloud Engagement. Customers are responsible for monitoring the accuracy of Einstein Content Selection.

Model Performance Measures

Model performance metrics include data such as click-to-open rate (CTOR) and click-through rate (CTR). All metrics are aggregated and anonymized.

Training Data

You have a customized version of the model that's trained on your data alone. Data from one Salesforce customer doesn't affect the behavior for another Salesforce customer. While model training happens for each customer on their data, the initial development of the model is validated with a representative set of pilot customers' data.

Ethical Considerations

Review the ethical factors associated with the Einstein Content Selection and Testing model in Marketing Cloud Engagement. To avoid bias and other ethical risks, this model doesn't include demographic data. Further bias is mitigated by training the model with a robust content catalog.

Einstein Content Testing

To optimize engagement, quickly test images in Einstein Content Testing. For more complex personalized targeting, use Einstein Content Selection, which includes fatigue rules and targeted content based on user preferences.

EDITIONS

Available in: **Professional**, **Corporate**, and **Enterprise** Editions

Content Testing consumes Einstein Content Selection Impressions, which is a type of super message. Images are selected in real time, so super messages are consumed only when an email open event is received. For more information, see Multipliers for Marketing Cloud Engagement and Marketing Cloud Engagement Data Usage Types.

With automated testing, Einstein runs a multi-armed bandit test that balances optimization of winning content with open-time experimentation for the duration of the test. The winning content can be dynamic, and is defined as content with the highest click-to-open

rate at the time an open event is received. Winning content is selected more often than the remaining experimental content. This experiment type is intended for continual self-regulation, although you can opt to select a winner so that all subsequent opens receive the same content. The automated test is best for longer-duration sends, such as a long-running journey or a send that's managed by Einstein Send Time Optimization, or when you don't want to self-manage the experiment. See the model card for more details.

The manual approach equally distributes content until a winner is determined. You can either identify a winner manually after reviewing the results or have the winner determined after a certain number of clicks is reached. If you want the winner to be determined, the content with the highest click-to-open rate is selected when the click threshold is reached. Manual tests work well when you're experimenting with a test audience and the winner determines which content to include in subsequent large batch sends. Manual testing is also useful when experimenting for a long-running journey and if you want more control when a winner is determined.

Create a Content Test

Use Einstein Content Testing to compare up to 32 images to determine what works best. You can create automated tests or manual A/B/n tests. You can also access previous tests on the Content Test page. Draft, completed, and archived tests aren't available.

Delete a Content Test Draft

When a test draft is no longer needed, you can delete it.

Stop a Content Test

You can stop a manual or automated content test at any time. For example, you might want to stop a manual test after you've received engagement data on a few thousand opens. Generally, you don't need to stop an automated test unless you want to override the continual testing portion and ensure that all images are optimized to a single asset.

Archive a Content Test

Clean up your list of content tests by archiving tests that are no longer relevant.

View Content Test Performance

To increase your subscriber interactions, use the performance results data to review the click rate and open rate and guide your messaging.

Create a Content Test

Use Einstein Content Testing to compare up to 32 images to determine what works best. You can create automated tests or manual A/B/n tests. You can also access previous tests on the Content Test page. Draft, completed, and archived tests aren't available.

See Einstein Content Testing on page 309 for information about the difference between automated and manual testing. To personalize contest testing, assign content to placements in your email template. You can also apply rules to your test (see Einstein Content Block).

1. In Einstein Content Testing, click **Content Test**.

2. Click **New Test**.

3. Name and describe the test so that others can find it.

   💡 Tip: Use the description to record what you're testing, give context to your test results, and let others know why the test was created.

4. Click **Next**.

5. Add or select the files to test, and click **Next**.

6. Select a test mode and set the selection or click total to indicate the test's duration.

   • To send the content asset that's winning to more recipients, use Automated Test distribution test mode on page 309.

   • To send the same number of messages to recipients of each content asset that you're testing, use Manual Control distribution test mode on page 309 If you select Manual Control distribution test mode, tell Einstein how to determine the winner.

7. Click **Next**.

8. Review your settings.

9. To start testing, publish the test and then create a Contest Testing Block in Content Builder.

SEE ALSO:

> Use Einstein-Tested Content in Your Emails
>
> Use Einstein-Tested Content in Your Emails

Delete a Content Test Draft

When a test draft is no longer needed, you can delete it.

You can only delete content test drafts. To remove a completed test from your list of active tests, archive it.

1. In Einstein Content Selection, click **Content Test**.

2. Next to the test to delete, click ▼ .

3. Click **Delete**.

SEE ALSO:

> Archive a Content Test
>
> Archive a Content Test

Stop a Content Test

You can stop a manual or automated content test at any time. For example, you might want to stop a manual test after you've received engagement data on a few thousand opens. Generally, you don't need to stop an automated test unless you want to override the continual testing portion and ensure that all images are optimized to a single asset.

1. On the Einstein Overview page, click the test that you want to stop.

2. Click **Stop Test**.

3. Choose the winning asset for subscribers to see in subsequent message opens.

Archive a Content Test

Clean up your list of content tests by archiving tests that are no longer relevant.

1. In Einstein Content Selection, click **Content Test**.

2. Next to the test to archive, click ▼ .

3. Click **Archive**.

   Access archived tests by clicking ▼ next to Active Tests.

View Content Test Performance

To increase your subscriber interactions, use the performance results data to review the click rate and open rate and guide your messaging.

1. On the Einstein Overview page, click the test that you want to review.

2. Scroll to the performance result details.

Einstein Content Tagging

Einstein Content Tagging applies searchable tags to image files in your Marketing Cloud Engagement account. You can have Einstein add up to 25 tags per image. Einstein tags existing JPG, JPEG, and PNG files that are 10 MB or less.

The default prefix for all Einstein tags is MCECT. You can optionally upgrade to a nested tagging structure and suffix. For more information, see Set Up Nested Einstein Content Tags.

Einstein analyzes and tags new images one time every 24 hours. New images are tagged based on account limits.

Note: This feature uses Google Vision to analyze and process image files. To learn more, visit Google Vision.

Table 15: Annual New Image Limits

Account Level	Maximum Number of New Images
Enterprise	4,000
Corporate	2,000
Professional	1,000

3

Einstein Content Tagging Confidence Level

With Einstein Content Tagging, you can select the confidence level between 0.5 (lowest) and 1.0 (highest) to use for automatic tags in Marketing Cloud Engagement. Use a higher confidence level to improve the accuracy of the tags applied to your images. Use a lower confidence level to broaden the scope of tags included.

Set Up Einstein Content Tagging

Configure Einstein Content Tagging in Marketing Cloud Engagement Setup. Some settings can't be modified after you configure them, but you can change the tagging language and tagging location at any time.

Modify the Tagging Language

Select from one of over 100 languages to use when automatically tagging images.

Disable, Delete, or Reset Einstein Content Tags

You can pause automatic tagging, remove existing automatically generated tags, or reset Einstein-generated tags within a single business unit. Pause automatic tagging by disabling Einstein Content Tagging (ECT). Then you can resume tagging, delete tags, or reset tags.

Gauge Content Performance Using Einstein Content Tags

See the content tags that Einstein generates in Einstein Content Selection Performance Analytics to understand which aspects of your content are performing well.

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Einstein Content Tagging Confidence Level

With Einstein Content Tagging, you can select the confidence level between 0.5 (lowest) and 1.0 (highest) to use for automatic tags in Marketing Cloud Engagement. Use a higher confidence level to improve the accuracy of the tags applied to your images. Use a lower confidence level to broaden the scope of tags included.

This feature is powered by Google Vision. Vision analyzes the pixels and patterns of your image and searches its extensive repository for matching patterns in previously tagged images. Vision's confidence level is determined by how often it has analyzed similar images and the distinctiveness of the tags applied. To learn more, visit Google Vision.

Set Up Einstein Content Tagging

Configure Einstein Content Tagging in Marketing Cloud Engagement Setup. Some settings can't be modified after you configure them, but you can change the tagging language and tagging location at any time.

You can't modify the maximum tags per image, tagging prefix, or tagging confidence level when Einstein Content Tagging is active. To modify these settings, turn off Einstein Content Tagging and delete the tags.

1. In Setup, expand Einstein and click **Einstein Content Tagging**.
2. Click **Settings**.
3. Enter the maximum number of tags per image, up to 25.
4. (Optional) Enter an alphanumeric prefix for the tag to help users distinguish between tags that you add and tags added by Einstein Content Tagging.
5. Select the confidence level between 0.5 (lowest) and 1.0 (highest).

   💡 Tip: Start by setting the confidence level to 0.75, and then adjust the confidence level based on tagging results.

6. Click **Save**.
7. Select the tagging location.
8. Select the language.
9. Turn on Einstein Content Tagging.

Modify the Tagging Language

Select from one of over 100 languages to use when automatically tagging images.

- Einstein Content Tagging defaults to tagging images in English.
- You can modify the tagging language at any time. But the newly chosen language is applied to automatically applied tags only. Einstein doesn't modify the tags that you create.
- Tags are updated one time every 24 hours. Only newly uploaded or modified images are tagged.

1. In the Setup app, expand Einstein and click Einstein Content Tagging.
2. Select a Language in the Select Einstein Content Tagging Language section.
3. Click **Update**.
   New and newly modified image tags are updated to appear in the new language within 24 hours.

Disable, Delete, or Reset Einstein Content Tags

You can pause automatic tagging, remove existing automatically generated tags, or reset Einstein-generated tags within a single business unit. Pause automatic tagging by disabling Einstein Content Tagging (ECT). Then you can resume tagging, delete tags, or reset tags.

- To delete existing tags, turn off ECT first.
- To modify tagging settings, delete existing tags. But to modify tagging language or tagging location, it's not necessary to delete tags.
- Deleted tags can't be restored.
- Wait 24 hours after deleting the tags to re-enable ECT. If you delete tags before Einstein Content Tagging is re-enabled, all images are retagged using the settings defined.
- If you don't delete images before re-enabling ECT, ECT resumes tagging using the previous settings. Previous tags are updated only if the image is modified.

1. In the Setup app, expand Einstein and click **Einstein Content Tagging**.
2. Turn off Einstein Content Tagging.

   💡 Tip: To temporarily pause automatic tagging, stop here. Turn ECT back on any time.

3. Click **Delete**.
4. Click **Delete Tags**.
5. Click **Delete**.

   Deleting tags for your business unit can take up to 24 hours.

6. If necessary, update the tagging settings, location, and language.

   💡 Tip: You can modify tagging settings after deleting existing tags.

7. Turn on Einstein Content Tagging.

Gauge Content Performance Using Einstein Content Tags

See the content tags that Einstein generates in Einstein Content Selection Performance Analytics to understand which aspects of your content are performing well.

Use Einstein Content Tagging with Einstein Content Selection to gain more insight into which types of content perform best for your audience. Einstein uses AI to analyze and tag content selection assets according to what's in the image. Correlating the tags with selections and clicks can help show which aspects of your content are meaningful to your audience.

- Enable Einstein Content Tagging in Setup's Einstein Content Selection settings.
- Find out the types of content tags that perform best and the total of each type with Einstein Content Selection Performance Analytics.

Einstein Email Recommendations

Use Einstein Email Recommendations to observe customer behavior, build preference profiles, and deliver the next-best content or product. You can also refine recommendations to match your business rules. Recommendation content surfaces in placeholders for recommendations on your website.

Email recommendations are delivered as a pre-built image and link pair and are activated when a user engages with the email. We refer to email recommendations as engagement recommendations, meaning the logic and scenarios are processed immediately before they see the recommendation.

The image in the recommendation is based on an HTML template that is used to style what a recommendation looks like. Each product or content recommendation is generated ahead of time and stored to ensure that the image is instantly available. By pre-processing displays and logic for each product or content recommendation, the most up-to-date recommendation is delivered without sacrificing performance when a subscriber engages with the email.

Here's the required HTML that that is included in an email template for a block with two recommendations.

```
<a href="https://{MID}.recs.igodigital.com/rr/v2/HASH/l/1/%%emailaddr%%">
    <img src="https://{MID}.recs.igodigital.com/rr/v2/HASH/i/1/%%emailaddr%%">
</a>

<a href="https://{MID}.recs.igodigital.com/rr/v2/HASH/l/2/%%emailaddr%%">
    <img src="https://{MID}.recs.igodigital.com/rr/v2/HASH/i/2/%%emailaddr%%">
</a>
```

Here's the HTML to create the image used in this call.

```
<div style="font-size:12px;color:black;width:150px; text-align:center;">
<img style="max-width:150px;" src="%%ImageLink%%" />

<p><b>%%ProductName%%</b></p>
%%[ if SalePrice < RegularPrice then ]%%
<s>Regular Price: %%RegularPrice%%</s>
<br/>

<span style="color:red;">Sale Price: %%SalePrice%%</span>
%%[ else ]%%
%%RegularPrice%%
%%[ endif ]%%
<p>%%Description%%</p>
</div>
```

This image shows an example of an image generated and called via the link in the email recommendations. The link redirects to the page on the site while tracking the click:

Brown Boot

$99.99

NTO Retail Brown Boot

Each recommendation is an individual image. If you needed 4 recommendations in a call, the HTML must include 4 image and link pairs. The display of the recommendation is unified across the entire recommendation, so with engagement recommendations, all four recommendations use the same HTML and AMPscript. Because email recommendations are displayed as an image, consider the mobile responsiveness of the design.

For information about how recommendations are applied to messages, see Multipliers for Marketing Cloud Engagement.

Einstein Email Recommendations Dashboard

The email recommendations dashboard in Einstein Recommendations displays a list of available recommendations. From here, you can create, edit, or delete a recommendation.

Create Einstein Email Recommendations

To create Einstein Email Recommendations, set up the customer profile privacy. Then the system generates generic recommendations from the scenarios you configured.

Supported Fonts

Einstein Email Recommendations supports multiple fonts.

Einstein Recommendations

Einstein Recommendations deliver the next-best product, content, or offer to every individual through product and content recommendations for email and web. Every customer interaction is an insight. With every click, download, view, and purchase, customers are giving data about their preferences. Einstein Recommendations combine user behavior with algorithms and your unique business rules to build a user profile of affinities. Use that profile to determine the most-relevant content and products for each customer in real time. Hyperforce doesn't support using email or web recommendations.

Einstein Email Recommendations Dashboard

The email recommendations dashboard in Einstein Recommendations displays a list of available recommendations. From here, you can create, edit, or delete a recommendation.

The dashboard appears when you open Einstein Web Recommendations. To return to the dashboard, click **Overview**.

The dashboard includes:

- the recommendation name
- the selected display
- the recommendation ID
- the gear icon

> 💡 **Tip:** To delete or edit a recommendation or get the code, click the gear icon.

Create Einstein Email Recommendations

To create Einstein Email Recommendations, set up the customer profile privacy. Then the system generates generic recommendations from the scenarios you configured.

Set the customer profile to one of these options.

- Do Not Track
- Do Not Profile
- Do Not Process

For example, if you configure View as the top scenario, a visitor who views a product detail page sees recommendations for products that other customers also viewed.

1. Create Einstein Email Recommendations Content

   Determine what content to include in the recommendation.

2. Create Einstein Email Recommendations Logic

   Use Einstein Email Recommendations to create custom recommendations logic or choose from the list.

3. Configure the Einstein Email Recommendations Layout

   Determine the layout for how recommendations appear.

4. Configure an Einstein Email Recommendations Scenario

   Choose the recommendation scenarios to use in Einstein Email Recommendations.

5. Insert Einstein Email Recommendations Code

   Copy and insert the Einstein Email Recommendations code into your email.

Create Einstein Email Recommendations Content

Determine what content to include in the recommendation.

1. To create a custom display, click **Create New**. To choose a standard display, hover over the image and click **Select** or **Edit** and go to step 3.

2. For a custom display, enter a name and click **Create**.

3. Click **Create**.

4. Select an identifier to add to the display and click **Add**. Repeat this step for each identifier you want to add.
   The code for your selections appears.

5. To preview the content, click **Preview**.

6. To save your display without publishing, select **Stage Changes**. Alternatively, click **Save and Publish** to save the display and publish it.

   📝 Note: You must publish the content before you can use it in an email.
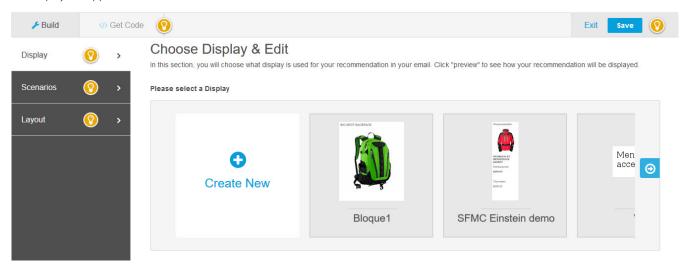
Create Einstein Email Recommendations Logic

Use Einstein Email Recommendations to create custom recommendations logic or choose from the list.

1. Click **Einstein Email Recommendations**.

2. To use standard logic, click the name.

3. To create your own logic, click **Create New Logic** .

    a. Enter a name.

    b. Select a catalog.

    c. Click **Create**.

The Display tab appears.

Configure the Einstein Email Recommendations Layout

Determine the layout for how recommendations appear.

1. On the **Logic** tab, click the **Layout** tab.

2. To select the number of columns and rows for the recommendations content, hover over the grid, and click the last cell to include.

   For example, to render in the columns with two rows, click the cell labeled *3X2*.

3. Click **Preview**.

4. Edit your selection, if necessary.

5. Click **Save**.

Configure an Einstein Email Recommendations Scenario

Choose the recommendation scenarios to use in Einstein Email Recommendations.

1. On the **Scenarios** tab, select a scenario from the list.

2. Click **Add**.

   📝 Note: For details about what each scenario does, see Einstein Recommendation Scenarios.

3. Click **all areas** and select a recommendation area from the dropdown list.

4. To add more scenarios, repeat steps 1 through 3.

   📝 Note: When there are multiple scenarios, Einstein Recommendations returns predictions from the highest-ranked scenario.

5. To preview the recommendations, click **Preview**.

6. To reorder the priority of scenarios, drag them into the order from top to bottom on the canvas.

7. To use waterfall predictions, select **Enable Waterfall Prediction**.

8. To suppress system-generated scenarios, select **Disable System Scenarios**.

9. Click **Save**.

> **Note:** To restore the default scenario configuration, click **Restore to Default Best Practices** and click **Save**.

10. Click **Exit**.

Insert Einstein Email Recommendations Code

Copy and insert the Einstein Email Recommendations code into your email.

> **Tip:** To customize how recommendations render in an email, use AMPscript.

1. On the **Logic** tab, select a recommendation.

2. Click the **Get Code** tab.

3. To preview the recommendation, click **Preview**.

> **Note:** Einstein Contact Code generates content in a preview only after you select a subscriber.

4. Copy the code.

5. Paste the code into the `<head>` or `<body>` section of the email.

AMPscript Functions for Einstein Email Recommendations
View a list of commonly used AMPscript functions for Einstein Email Recommendations.

AMPscript Functions for Einstein Email Recommendations

View a list of commonly used AMPscript functions for Einstein Email Recommendations.

Use these functions to define email image templates, or for conditional formatting, data formatting, and sanitizing.

Product Attributes

Replace the attribute name with the attribute value of the item to recommend.

> **Example:** `%%AttributeName%%`

Conditional Operators

Conditional statements allow conditional display and formatting, such as a strikethrough over the regular price when items are on sale.

Operators where A and B can be a:

- string
- float
- product attribute or exact name from your catalog, such as `%%WidthInInches%%`

A > B	True when A is greater than B

A < B	True when A is less than B
A >= B	True when A is greater than or equal to B
A <= B	True when A is less than or equal to B
A == B	True when A equals B
A!= B	True when A isn't equal to B
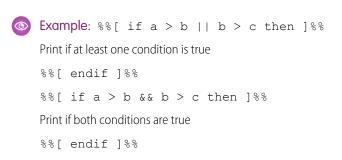
👁 Example:

```
%%[ if a > b then ]%%
print this if statement is true
%%[ else ]%%
optional line that will print if statement if false
%%[ endif ]%%
```

Logical Operators

Use logical operators to make compound conditions in if statements. Use only one logical operator in a condition.
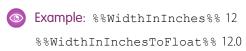
| && | Logical And - Executes when both conditions are true. |
| || | Logical Or - Executes when either condition is true. |

👁 Example: `%%[ if a > b || b > c then ]%%`

Print if at least one condition is true

`%%[ endif ]%%`

`%%[ if a > b && b > c then ]%%`

Print if both conditions are true

`%%[ endif ]%%`

Conversion Functions

ToFloat

Appending an item attribute key with `ToFloat` converts the value of a string field in your catalog to a floating-point number.

👁 Example: `%%WidthInInches%%` 12

`%%WidthInInchesToFloat%%` 12.0

LengthNum

Appending an item attribute key with `LengthNum` returns the length of the value in your catalog. Use `LengthNum` only within the statement.

👁 **Example:** `%%[if DisplayRegularPriceLengthNum < 5 then ]%% %%ProductName%% %%[else]%% %%DisplaySalePrice%% %%[ endif ]%%`

LongestWordLength

Append LongestWordLength to an item attribute key to convert the value to a string. This function calculates the longest word then returns a number for the length of that word.

👁 **Example:** `%%Description%%`

I love Einstein Email Recommendations

`%%DescriptionLongestWordLength%%`

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Display Functions

Rating Stars

Take the value stored in the Rating field and convert it to the number of stars where:

- **maximum_value** is the highest ranking
- **color** is the color of the stars

The rating comes from the product's Rating attribute.

👁 **Example:** `%%= RatingStars(maximum_value, color) =%%`

RegularPriceMain or SalePriceMain

Outputs the integer part of the field mapped to RegularPrice or Price for streaming updates and SalePrice.

👁 **Example:** `%%RegularPriceMain%%` 34

`%%SalePriceMain%%` 29

RegularPriceFractional or SalePriceFractional

Outputs the fractional part of the field mapped to RegularPrice or Price for using streaming updates and SalePrice.

👁 **Example:** The following example assumes that the recommended item is regularly priced at 34.50, but on sale for 29.99.

`%%RegularPriceFractional%%` 50

`%%SalePriceFractional%%` 99

ToUpcase

Outputs the value in the catalog in uppercase.

👁 **Example:** `%%AuthorToUpcase%%` MARK TWAIN

FirstN

Where N is a whole number, outputs the first N characters of value.

👁 **Example:** `%%AuthorFirst6%%` Mark T

Split

Usage: SplitDAtl

Where D is the delimiter and I is the index, splits the value returns the string at the given index. The delimiter can be longer than 1 character and the index can be negative.

📝 **Note:** Currently the Split function can't be used inside an IF condition.

👁 **Example:** When the value for *Colors* is *Red~Blue~Green*: `%%ColorsSplit~At1%%` Blue

Replace

Usage: ReplaceAWithBEnd

Where A is the match substring and B is the replacement substring, it replaces the matches globally and outputs the value.

👁 **Example:** `%%AuthorReplaceMarkWithSamuelEnd%%` Samuel Twain

UpTo

Usage: UpToNByDWithOEnd

Where N is a whole number, D is the delimiter, and O is an optional overflow text, outputs the value up to the N index of D with O appended when included. Values shorter than the limit return unaltered and values without a delimiter match within the limit returns blank.

👁 **Example:** If the value for LongTitle is "Long~Item~Title" `%%LongTitleUpTo10By~With...End%%`: Long~Item…

`%%LongTitleUpTo9By~WithEnd%%`: Long

`%%LongTitleUpTo4By~WithEnd%%`: blank

`%%LongTitleUpTo9By~WithEnd%%`: Long

`%%LongTitleUpTo20By~WithEnd%%`: Long~Item~Title

Chaining

You can chain multiple functions together.

👁 **Example:** For example, if Author = Mark Twain `%%Author%%`: Mark Twain

`%%AuthorReplaceMarkWithSamuelEndReplaceTwainWithClemensEndToUpCase%%`: SAMUEL CLEMENS

Supported Fonts

Einstein Email Recommendations supports multiple fonts.

Font	Style
Century Schoolbook L	Bold
Century Schoolbook L	Bold Italic
Century Schoolbook L	Bold Italic
Century Schoolbook L	Roman
DejaVu Sans	Bold
DejaVu Sans	Book
DejaVu Sans Mono	Bold

Font	Style
DejaVu Sans Mono	Book
DejaVu Serif	Bold
DejaVu Serif	Book
Dingbats	Regular
Droid Sans Fallback	Regular
Hind Vadodara	Bold
Hind Vadodara	Regular
Hind Vadodara Light	Regular
Hind Vadodara Medium	Regular
Hind Vadodara SemiBold	Regular
IPAexGothic, IPAex	Regular
IPAexGothic, IPAex	Regular
IPAexMincho, IPAex	Regular
IPAexMincho, IPAex	Regular
Lato	Bold
Lato	Regular
Lato Black	Regular
Lato Hairline	Regular
Lato Light	Regular
League Script	Regular
Nimbus Mono L	Bold
Nimbus Mono L	Bold Oblique
Nimbus Mono L	Regular
Nimbus Mono L	Regular Oblique
Nimbus Roman No9 L	Medium
Nimbus Roman No9 L	Medium Italic
Nimbus Roman No9 L	Regular
Nimbus Roman No9 L	Regular Italic
Nimbus Sans L	Bold
Nimbus Sans L	Bold Condensed

Font	Style
Nimbus Sans L	Bold Condensed Italic
Nimbus Sans L	Bold Italic
Nimbus Sans L	Regular
Nimbus Sans L	Regular Condensed
Nimbus Sans L	Regular Condensed Italic
Nimbus Sans L	Regular Italic
Noto Mono	Regular
Noto Sans	Bold
Noto Sans	Bold Italic
Noto Sans	Italic
Noto Sans	Regular
Noto Sans CJK JP,Noto Sans CJK JP Black	Black, Regular
Noto Sans CJK JP,Noto Sans CJK JP Bold	Bold, Regular
Noto Sans CJK JP,Noto Sans CJK JP DemiLight	DemiLight, Regular
Noto Sans CJK JP,Noto Sans CJK JP Light	Light, Regular
Noto Sans CJK JP,Noto Sans CJK JP Medium	Medium, Regular
Noto Sans CJK JP,Noto Sans CJK JP Regular	Regular
Noto Sans CJK JP,Noto Sans CJK JP Thin	Thin, Regular
Noto Sans CJK KR,Noto Sans CJK KR Black	Black, Regular
Noto Sans CJK KR,Noto Sans CJK KR Bold	Bold, Regular
Noto Sans CJK KR,Noto Sans CJK KR DemiLight	DemiLight, Regular
Noto Sans CJK KR,Noto Sans CJK KR Light	Light, Regular
Noto Sans CJK KR,Noto Sans CJK KR Medium	Medium, Regular
Noto Sans CJK KR,Noto Sans CJK KR Regular	Regular
Noto Sans CJK KR,Noto Sans CJK KR Thin	Thin, Regular
Noto Sans CJK SC,Noto Sans CJK SC Black	Black, Regular
Noto Sans CJK SC,Noto Sans CJK SC Bold	Bold, Regular
Noto Sans CJK SC,Noto Sans CJK SC DemiLight	DemiLight, Regular
Noto Sans CJK SC,Noto Sans CJK SC Light	Light, Regular
Noto Sans CJK SC,Noto Sans CJK SC Medium	Medium, Regular

Font	Style
Noto Sans CJK SC,Noto Sans CJK SC Regular	Regular
Noto Sans CJK SC,Noto Sans CJK SC Thin	Thin, Regular
Noto Sans CJK TC,Noto Sans CJK TC Black	Black, Regular
Noto Sans CJK TC,Noto Sans CJK TC Bold	Bold, Regular
Noto Sans CJK TC,Noto Sans CJK TC DemiLight	DemiLight, Regular
Noto Sans CJK TC,Noto Sans CJK TC Light	Light, Regular
Noto Sans CJK TC,Noto Sans CJK TC Medium	Medium, Regular
Noto Sans CJK TC,Noto Sans CJK TC Regular	Regular
Noto Sans CJK TC,Noto Sans CJK TC Thin	Thin, Regular
Noto Sans Mono CJK JP,Noto Sans Mono CJK JP Bold	Bold, Regular
Noto Sans Mono CJK JP,Noto Sans Mono CJK JP Regular	Regular
Noto Sans Mono CJK KR,Noto Sans Mono CJK KR Bold	Bold, Regular
Noto Sans Mono CJK KR,Noto Sans Mono CJK KR Regular	Regular
Noto Sans Mono CJK SC,Noto Sans Mono CJK SC Bold	Bold, Regular
Noto Sans Mono CJK SC,Noto Sans Mono CJK SC Regular	Regular
Noto Sans Mono CJK TC,Noto Sans Mono CJK TC Bold	Bold, Regular
Noto Sans Mono CJK TC,Noto Sans Mono CJK TC Regular	Regular
Oswald	Bold
Oswald	Light
Oswald Regular	Regular
Standard Symbols L	Regular
URW Bookman L	Demi Bold
URW Bookman L	Demi Bold Italic
URW Bookman L	Light
URW Bookman L	Light Italic
URW Chancery L	Medium Italic
URW Gothic L	Book
URW Gothic L	Book Oblique
URW Gothic L	Demi
URW Gothic L	Demi Oblique

Font	Style
URW Palladio L	Bold
URW Palladio L	Bold Italic
URW Palladio L	Italic
URW Palladio L	Roman

Einstein Recommendations

Einstein Recommendations deliver the next-best product, content, or offer to every individual through product and content recommendations for email and web. Every customer interaction is an insight. With every click, download, view, and purchase, customers are giving data about their preferences. Einstein Recommendations combine user behavior with algorithms and your unique business rules to build a user profile of affinities. Use that profile to determine the most-relevant content and products for each customer in real time. Hyperforce doesn't support using email or web recommendations.

Tip: Your web administrator can help you to configure and install Collect Tracking Code and required data feeds.

Before you attempt to use Einstein Recommendations, the setup wizard walks you through the steps to import a catalog and configure Collect Tracking Code. Best practice is to observe website behavior for at least 30 days before launching any predictive content logic. This 30-day monitoring period allows the engine to dynamically build profiles and behavioral intent patterns of your user base.

Einstein Recommendations Prerequisites

Learn about the prerequisites for implementing Einstein Recommendations.

Einstein Recommendations Catalog

A catalog includes all fields that contain attributes used to make Einstein Recommendations. Einstein Recommendations filters assets based on these attributes. For instance, you can define assets in the recommendation pool based on a product's color or size, or an article's author and subject matter.

Einstein Recommendations Customer Profile Dashboard

Review a customer profile from this dashboard. Expand the view for greater detail or make changes to the customer privacy setting.

Einstein Recommendations Integrations

Integrate data gathered through Einstein Recommendations with Audience Builder and Contact Builder.

Einstein Recommendations Status Console

Einstein Recommendations Status Console monitors the Collect Tracking Code and catalog imports for common implementation errors. View where an error occurred and the details to help resolve the issue. This feature helps ensure that the Einstein Recommendations engine receives the data necessary to power optimal Einstein Recommendations and behavioral triggers for campaigns and journeys.

Fix an Einstein Recommendations Implementation Error

You can fix an implementation error from the Einstein Recommendations status console. You must fix each error individually.

Einstein Recommendations Rule Manager

Use Rule Manager to refine Einstein Recommendations for email and web.

Einstein Recommendation Scenarios

These scenarios help you produce Einstein Recommendations for email or the web in Marketing Cloud Engagement.

Waterfall Predictions

Prioritize your recommended scenarios from highest to lowest using waterfall predictions in Einstein Recommendations. In a waterfall prediction, Einstein goes down the list of scenarios and returns all available matching items until it reaches the total number of recommendations that you set. Set up a default site data scenario last in your hierarchy to ensure that Einstein fills the total number of recommendations.

Localized Recommendations

Configure Einstein Recommendations to deliver localized recommendations in multiple languages and currency values from a single business unit.

Einstein Recommendations Reports

Learn about reports available in Einstein Recommendations.

Einstein Recommendations FAQs

Get the answers to frequently asked questions about Einstein Recommendations.

SEE ALSO:

Einstein Recommendations Catalog

Fix an Einstein Recommendations Implementation Error

Einstein Recommendation Scenarios

Einstein Email Recommendations

Einstein Web Recommendations

Einstein Recommendations Prerequisites

Learn about the prerequisites for implementing Einstein Recommendations.

Einstein Recommendations Requirements

- A catalog of assets used to sync with user behavioral data and determine which recommendations to show.
- Collect Tracking Code used to monitor key variables and events on your website at the user level.

Note: For more information, watch this video about setting up Einstein Recommendations.

You can import one file for each catalog type.

Tip: Your web administrator can help you to configure and install Collect Tracking Code and required data feeds.

Note: We recommend observing website behavior for at least 30 days before launching any predictive content logic. This 30-day monitoring period allows the engine to dynamically build profiles and behavioral intent patterns of your user base.

Einstein Recommendations Catalog

A catalog includes all fields that contain attributes used to make Einstein Recommendations. Einstein Recommendations filters assets based on these attributes. For instance, you can define assets in the recommendation pool based on a product's color or size, or an article's author and subject matter.

Einstein Recommendations requires a minimum number of attributes, which varies depending on the application or specifications.

Catalog functionality is used for multiple purposes in Einstein Recommendations. Consider these areas as you decide which fields to add to a catalog.

- Support Collect: Catalog data that's passed from Collect ties to the catalog in the data via the Product Code (item) and SkuID (unique_id). These fields must match the Collect data to function properly.
- Build User Profiles: When collecting user data, the catalog takes the view ID and uses the tagged fields to build the profile.
- Support Recommendation Generation: Any data from the catalog can be used to build the recommendation.
- Locale and Language Support: If any attributes vary by a locale or language, add the field to the catalog.
- Support Attribute-Based Rules: Data that is in the catalog can support rule generation. For example, if you want only men's clothes shown in a particular recommendation, a field like "gender" could support this rule. If a data type isn't in the catalog, you can generate a rule for it.

Marketing Cloud Engagement accepts these types of catalogs.

- Product: Products that are available for purchase.
- Content: Articles, blog posts, videos, or other types of content that are available for view.
- Banner: Image files, such as hero graphics, calls to action, or offers.

You can import one file for each catalog type.

Einstein Recommendations Catalog Field Definitions

Catalog fields store your catalog's asset attributes for Einstein Recommendations. These attributes are both required and recommended catalog fields. You can also add custom attributes. Catalog field values can contain up to 1,024 single-byte characters or 512 double-byte characters.

Reserved Attributes

See a list of attributes that are reserved for specific use in Einstein Recommendations. You can't use these attributes to store other values.

Add an Attribute to Einstein Recommendations

An attribute describes a product or content characteristic, such as color, dimension, brand name, subject, or author.

Configure Custom Attributes for Einstein Recommendations

You can create custom attributes to use with your recommendations. Unmapped fields are automatically used to make recommendations. For streaming updates, Custom Attributes Configuration is available after Marketing Cloud Engagement starts receiving data from your site.

Create a Catalog Field Mapping

To ensure that catalog heading names are mapped to the required application field names, create a catalog field mapping in Einstein Recommendations.

Import a Catalog

Import a catalog to use in Einstein Recommendations by uploading a delimited text file. The first row of data must contain the column headings, and there must be at least two additional rows of catalog data. We recommend that you update your catalog daily to reflect the changes on the site by the next business morning. For improved reliability, file size is limited to 2 MB when using the catalog import option.

Catalog Summary

The Einstein Recommendations catalog summary includes the type of import used and the currently selected reminders interval. The file history table in the Status Console includes the date, time, and status history of the catalog uploads.

Catalog FAQ

Get the answers to frequently asked questions about the Einstein Recommendations catalog feature.

Einstein Recommendations Catalog Field Definitions

Catalog fields store your catalog's asset attributes for Einstein Recommendations. These attributes are both required and recommended catalog fields. You can also add custom attributes. Catalog field values can contain up to 1,024 single-byte characters or 512 double-byte characters.

Catalog Requirements

- Leave the catalog field blank rather than populating it with a Null value.
- Text fields can't include carriage returns, new lines, or HTML.
- All characters in the catalog must either be UTF-8 encoded or converted to valid HTML, except for the pipe and tilde characters.
- Items with a price of $0 are recommended and displayed with the price of $0.
- The final catalog file must be automated and uploaded daily with a unique static file name.

Product Catalog

Field Name	Required	Attribute Description
SkuID	No	A unique identifier for each product that's specific to the customer. This ID must match the product SKU on the website and be passed via the Collect Tracking Code.
ProductCode	Yes	Identifies a group of related products. For example, a piece of apparel appears in the catalog multiple times with a unique SkuID for each size that the product is available in. All the size variations are sent with the same ProductCode. The ProductCode can't contain spaces or special characters.
ProductName	Yes	Identifies a product in the title of product detail pages.
ProductType	Yes	Product category is open to retailers. The application maps your product types to our internal catalog system.
ProductLink	Yes	URL to reach the product detail page.
ImageLink	No	URL to the product image displayed in the recommendation.
RegularPrice	No	Regular price for the product. You can display this value in strikethrough text for a recommendation when a sale price is available.
SalePrice	No	Sale price for the product. It displays if a product is on sale.

Field Name	Required	Attribute Description
OnlineAvailability	Yes	Indicates if a product is available for recommendation. This field accepts only two values: Y for available or N for not available. If the field isn't sent with the feed, the default is Y. If it's sent as N, the product isn't returned in recommendations.

Content Catalog

Field Name	Required	Attribute Description
ContentID	Yes	A unique identifier for each piece of content that's specific to the customer. This ID matches the content ID on the website and is passed via the Collect Tracking Code.
Title	No	Title of content included in recommendations.
Link	Yes	URL to reach the content detail page.
ImageLink	No	URL of the image displayed in the recommendation.
Author	No	Author of specific content used to influence recommendations or to be displayed within the recommendations.
Category	No	Content category or categories.
Availability	Yes	Indicates if content is available for recommendation. This field accepts two possible values: Y for available or N for not available. If the field isn't sent with the feed, the default is Y. If it's sent as N, the content isn't returned in recommendations.
Publication Date	No	Date of publication to the site. Use the YYYY-MM-DD date format.
Keywords	No	Keywords that describe the content.

Banner Catalog

Field Name	Required	Attribute Description
BannerID	Yes	A unique identifier for each banner or offer that's specific to the customer. This ID

Field Name	Required	Attribute Description
		matches the banner ID on the website passed via the Collect code.
GroupID	Yes	Identifies a group of related banners. For example, the same banner can be available in multiple sizes. Each banner size must be sent with a separate BannerID, linked together with a matching GroupID.
Name	No	Used for easy identification and content management.
Category	No	Offer category, aligned to the catalog values sent for product and or content categories.
Link	Yes	URL to reach the banner or offer detail page.
ImageLink	Yes	URL to the banner image displayed in the recommendation.
LocationSize	Yes	Size of the banner location. This value can be a size value, such as 600x400, or a name value, such as HeroHome.
PPC	No	Price per click calculates key performance indicators. Round to the nearest 2 decimal places, and send without a currency symbol.
Availability	Yes	Indicates if the banner is available for recommendation. This field accepts two possible values: Y for available or N for not available. If the field isn't sent with the feed, the default is Y. If it's sent as N, the banner isn't returned in recommendations.
StartDate	No	Banners are excluded from the recommendation pool before the start date. Use the suggested YYYY-MM-DD date format.
EndDate	No	Banners are excluded from the recommendation pool on the end date. Use the suggested date YYYY-MM-DD date format.
Keywords	No	Describes the banner or offer.

Reserved Attributes

See a list of attributes that are reserved for specific use in Einstein Recommendations. You can't use these attributes to store other values.

Attribute Name	Reserved Use
ReleaseDate	The first date an item is available for recommendations. This field is required for new arrivals recommendations. The recommended format for this field is YYYY-MM-DD.
Rating	The user rating displayed for an item. This field is used to create ratings-based recommendations.
NumReviews	The number of reviews an item received. This field is used to create ratings-based recommendations based on items customers are talking about.
Keywords	A list of keywords that are used to match attributes to the customer's interests.
Description	A description of an item included in the recommendations.
ProductFamily	A field that groups multiple ProductCodes. For example, the ProductFamilyID can include 5 colors of a specific style of t-shirt. These 5 colors are sent in the catalog as 5 unique ProductCodes, with 6 SKU IDs each.
Accessories	A list of SKU IDs or ContentIDs defined by the manufacturer or content team, used to create business rules. For example, these products can be excluded from recommendations on the detail pages if they're already being served to the user on this page. Use a tilde (~) format for this list.

Add an Attribute to Einstein Recommendations

An attribute describes a product or content characteristic, such as color, dimension, brand name, subject, or author.

1. At the end of the column heading, enter the attribute name. Don't include spaces in the attribute name.

2. Specify the attribute value at the end of the attribute value list.

   If an attribute has multiple values, separate them with a tilde (~). Each value can have up to 1,024 single-byte characters or 512 double-byte characters.

Product Record

👁 **Example:** `SkuID|ProductCode|ProductName|ProductType|ProductLink|ImageLink|RegularPrice| SalePrice|OnlineAvailability|ProductCost|ProductFamilyID|ProductDescription| BrandName|Manufacturer|Color|Material|Rating|NumReviews|ReleaseDate| Keywords 12345|XCode12345|Brand X Product Whiz 9000|Electronics| http://www.companyx.com/product|http://www.companyx.com/product/image.jpg| 99.99||Y|59.99|YCode12345|An amazing product.|Brand X|Company X|Blue~Red| Metal|4|25|2012-08-27|Technology~Music`

To delete a product, change its Online Availability attribute in the Catalog before uploading. For instance, in this example, change the Y in the field that precedes 59.99 to *N*. After you upload the catalog file, the N value prevents the product from showing up in product recommendations.

Content Record

👁 Example:

```
ContentID|Title|Link|ImageLink|Author|Category|PublicationDate|Keywords|Availability
12345|Crock Pot Lasagna Soup|http://www.companyx.com/lasagna_soup|
http://www.companyx.com/soup/image.jpg||Recipes|2014-01-01| Italian~Soup~Slow
Cooker|Y
```

Banner Record

👁 Example:
```
BannerID|GroupID|Name|BannerType|Link|ImageLink|LocationSize|Category|PPC|
StartDate|EndDate|Keywords|Availability 12345|GRPABC|Free Shipping on 3+
Cookbooks|Shipping|
http://www.companyx.com/offer|http://www.companyx.com/offer/image.jpg|600x400|
Cookbooks~Slow Cooker|0.0025|2014-01-01|2014-03-31||Y
```

Configure Custom Attributes for Einstein Recommendations

You can create custom attributes to use with your recommendations. Unmapped fields are automatically used to make recommendations. For streaming updates, Custom Attributes Configuration is available after Marketing Cloud Engagement starts receiving data from your site.

Consider using these types of field tags:

- Categories and subcategories—Men's, Women's, Kids, Coats, Shoes
- Brands—Nike, Adidas, Under Armour
- Seasons—Fall, Spring
- Topics—Politics, Sports, Lifestyle
- Interests—Hiking, Golf, Cosmetics

Avoid these tags:

- Binary (yes or no) values—We recommend that you use binary values only when they have the most impact.
- Sizes or colors and other SKU-level attributes—The recommendation engine aggregates behavior at the Product Code level. Attributes at the SKU level can impact results.

1. In Einstein Recommendations, hover over Admin and select **Implementation**.
2. Scroll to Custom Attributes.
3. Click **Custom Attribute Configuration**.
4. Select all the fields included in the catalog.
5. Save the configuration.

Create a Catalog Field Mapping

To ensure that catalog heading names are mapped to the required application field names, create a catalog field mapping in Einstein Recommendations.

1. Click **Field Mapping**.
2. Review the fields for mapping accuracy.
3. To change, expand the selection box under Your Headings and change the selections listed in the catalog heading names.

Unique catalog headings are required for each field. Duplication of a heading automatically deletes the heading from the previously mapped field.

4. For **Additional Fields**, indicate whether the mapping accepts multiple values.

5. Select the tagged fields.

6. Select fields to use for personalization.

7. Select a data format that matches the date field in your catalog.

8. Save your changes.

👁 Example:

	Field	Sample Record	Collect Tracking Code (Incl. Stream Catalog Updates)		Predictive Web/Email		"IGO_PRODUCTS"	"IGO_PRODUCTATTRIBS"	"IGO_PURCHASES"	"IGO_VIEWS
1	**SkuID**	s000001	*unique_id*	→	*SkuID*	→	sku (Max Length:256)	sku (Max Length:256)	sku (Max Length:256)	sku (Max Length:256
2	**ProductCode**	sushi001	*item*	→	*ProductCode*					
3	**ProductName**	Sushi and Sashimi	*name*	→	*ProductName*	→	name (Max Length: 1000)			
4	**uuid** (ProductCode + MasterProduct#)	sushi001~1			*uuid*	→	Uuid (Max Length:256)	Uuid (Max Length:256)		
1	**email**	John.Smith@salesforce.com	*email*	→	*email*	→				
2	**user_id**	c46caf6c-02cb-11e8-817d-22000b570052	*Cookie:igodigitaltc2*	→	*_id*	→			user_id (Max Length:256)	user_id (Max Length:256

Import a Catalog

Import a catalog to use in Einstein Recommendations by uploading a delimited text file. The first row of data must contain the column headings, and there must be at least two additional rows of catalog data. We recommend that you update your catalog daily to reflect the changes on the site by the next business morning. For improved reliability, file size is limited to 2 MB when using the catalog import option.

📝 Note: Merge data from disparate sources before importing into Marketing Cloud Engagement. The data services team can help with data preparation. Contact your account representative for details.

The two catalog import options are:

• **Daily Flat-File Upload**—The daily flat file upload is added to an FTP account or publicly accessible web URL and imported into Einstein Recommendations at the same time every day. You can upload a full list of all products and a daily delta file.

• **Streaming Update**—The Streaming Update option adds and updates products and content through another snippet of Server-Side JavaScript. All data must be available in the web layer sent in each call.

The data that is passed is the same no matter which method is chosen.

💡 Tip: If you opt to use streaming updates and batch upload concurrently, both sources must contain the same data to avoid one overwriting the other.

Visit Personalization Builder Catalog Field Definitions on page 329 for a list of required catalog fields.

Product Recommendation customers often have a product catalog already generated and decide to reuse or fashion the daily import on something existing. Since the catalog data includes products, attributes, rules, and multiple languages the flat file catalog is often the more appropriate choice. If a specific Product Code has numerous SkuID, the streaming update call includes data for each variation, which can be a rather large payload. You can use Streaming Updates with Product Recommendations when all the data is available.

Content Recommendation clients are less likely to have a pre-created content catalog and often choose Streaming Updates. The data layer of the website or CMS contains the content to add to the catalog and is easily added using JavaScript.

There's no direct functionality to delete a product recommendation. The current way to delete a product is to change the product's Online Availability via Attributes within the Catalog before upload. Set **Online Availability** for the product to **N** within the Catalog. This action prevents the product from showing up in recommendations.

There are two ways to name the file to be uploaded daily. A static filename or a wildcard.

- Static Filename: The static filename is uploaded daily. We recommend that you replace it on the FTP before the upload kicks off. If there are no changes in the file or a new one isn't uploaded, the catalog import is skipped. An example of a static filename is product_catalog.csv.

- Wildcards in Filename: You can add a wildcard (*) at the end of the filename that allows a new file name to be updated daily. Add the date for the file at the end of the file and replace it with an asterisk (*) when adding to the upload UI.

   💡 Tip: We recommend that you use the naming format *static_filename_YYYY_MM_DD.xxx*. For example, `product_catalog_2018_01_01.csv`. The filename is added to the upload as `product_catalog_*`. The filename is sorted in descending order, so we recommend adding the year first to ensure that it sorts correctly.

1. In Email Recommendations or Web Recommendations, hover over Admin and select **Implementation**.

2. Select your catalog sync method.

3. To use streaming updates, enter your website domain name and click **Register**. If you don't want to use streaming updates, you can skip this step.

4. Choose a catalog type.

5. Select the format of your catalog.

6. Name your catalog.

7. Indicate whether it's a partial catalog.

   💡 Tip: To upload multiple files, use an asterisk in place of part of a file name as a wildcard. For example, to import catalog_file_20130101.csv, catalog_file_20130102.csv, and catalog_file_20130103.csv, you can enter catalog_file_*.csv. The system sorts the files in descending order and imports the top result. Use the YYYY_MM_DD date format when using dates in wildcards to ensure that imports include the latest file.

8. To receive status notifications for the import, enter an email address.

9. Click **Upload New File**.

10. To import more catalogs, repeat these steps.

    📝 Note: You can only import one product, content, and banner catalog. When you do, previously imported catalogs of the same type are overwritten.

Einstein Recommendations Catalog Import Statuses
Learn about import statuses for a catalog import into Einstein Recommendations.

Einstein Recommendations Catalog Import Statuses

Learn about import statuses for a catalog import into Einstein Recommendations.

Status	Definition
Checking for an Available Product	The system is confirming the availability of items in your catalog.
Duplicates Found for SKUID: [number]	Catalog import completed successfully but found duplicate SKUIDs.

Error Uploading File	A system error prevented initial file upload.
Field Mapping Required	Your catalog's field mapping is incomplete.
Import Queued	No errors were found and the import begins.
Problems: FTP	Couldn't get the file. Often an issue where an FTP password or username has changed
Problems: Parsing	Illegal quoting. Double quotes aren't encoded. Use $\backslash x22$ as the Unicode escape sequence for double quotation marks.
Successfully processed [number] items	Your catalog imported successfully with a total of [number] items.
Problems: Unavailable Product	The system found items listed as unavailable.
Processing Catalog	Catalog import is in progress.
Processing errored before completion. OR Processing errored before completion on SKUID: [number]	An error occurred that stopped the import.
Requires Primary Key Mapping	Select a Primary Key in field mapping.
Successful	Imported without error.
System Error	There was a failure in the process of receiving queue or status messages.
Valid	Imported with an error (such as a duplicate SKUID).
Validation Queued OR Validating	The system is checking your catalog for errors.

Catalog Summary

The Einstein Recommendations catalog summary includes the type of import used and the currently selected reminders interval. The file history table in the Status Console includes the date, time, and status history of the catalog uploads.

To view the summary, click the gear icon and select **Summary** or the catalog link in the catalog type column to view the catalog summary.

> **Note:** Incomplete manual imports are excluded from the file history table.

You can view and change catalog settings and notifications under Settings.

- To change the catalog import or file type, select the dropdown menus for those fields. When prompted, complete the additional required fields.
- To upload a new catalog file, select **Upload New File**. You advance to the catalog import page.
- To change the email notification address, enter a new address in the **Email Notification** field.
- You can also change the notification start date, frequency, and whether to receive notifications for failed catalog updates.
- If you select **Refresh Current File** and use an FTP or a URL file, the system immediately queues the file for import.

> **Note:** Don't use this selection with Manual import type.

Catalog FAQ

Get the answers to frequently asked questions about the Einstein Recommendations catalog feature.

What Methods Are Available to Import a Catalog?

Your options are FTP, public URL for streaming, or manual upload.

Which File Formats Can I Use with Catalogs?

The format must be UTF-8.

Can I Send Multiple Values in a Single Field?

To include multiple values in a custom field, separate them with a tilde (~). Standard fields don't support multiple values.

Can I Use My Current Marketing Cloud Engagement Catalog in Einstein Recommendations?

Yes, you can use your catalog if it includes all the required fields. Export the catalog to your FTP account in UTF-8 format and then import it into Einstein Recommendations.

Can I Use a URL as My ContentID?

You can use a URL as your ContentID if it's fewer than 256 characters. However, using a URL as the Content ID isn't recommended as a best practice.

Can Einstein Recommendations Import Offline Data Feeds?

Yes. A one-time historical data feed of online or offline purchases can be imported, in catalog format, as part of a standard implementation. This option is great for building "people who bought….also bought" lists, one of our highest revenue generating algorithms.

Can I Display Currency Denominations Other Than US Dollars?

Yes. Include the currency symbol in the Einstein Recommendations catalog and make it a text field outside of your standard pricing fields.

How Many Decimal Places Must Pricing Fields Include?

Salesforce recommends including 2 decimal places.

Where Is Catalog Data Stored?

Catalog data is stored in Einstein Recommendations and exposed in Marketing Cloud Engagement through these standard data extensions: IGO_PRODUCTS and IGO_PRODUCTATTRIBS. To view standard data extensions in your account, go to Data Extensions in Contact Builder.

Does Einstein Recommendations Integrate with Tag Management Vendors?

Yes, Einstein Recommendations can integrate with tag management solutions. Salesforce doesn't provide templates, but many vendor partners have templates that you can use or other customized methods to add Collect Tracking Code to your content. Tag management can reduce page load time and reduce implementation and maintenance time and effort.

Which Web Content Management Systems Integrate with Einstein Recommendations?

Einstein Recommendations is platform agnostic and can be implemented across any CMS.

When Do Recommendation Images Refresh?

Images refresh when a new display is published or manually refreshed. The images also refresh after one of these fields change via a catalog file import or streaming update API call.

Can I Change an Item's Product Code After the Initial Import?

No. You can't change the product code for a SKU ID after the initial import. Changing the product code creates a mismatch between the product code and the UUID.

What Methods Are Available to Import a Catalog?

Your options are FTP, public URL for streaming, or manual upload.

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When Do Recommendation Images Refresh?

Images refresh when a new display is published or manually refreshed. The images also refresh after one of these fields change via a catalog file import or streaming update API call.

These fields include:

- ProductName
- ImageLink
- OnlineAvailability
- RegularPrice
- SalePrice
- Any other field used in an image template when the change is triggered by a streaming update

Can I Change an Item's Product Code After the Initial Import?
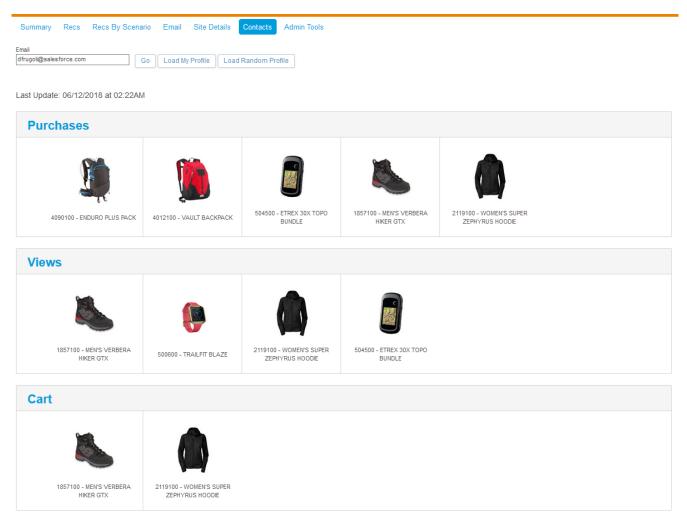
No. You can't change the product code for a SKU ID after the initial import. Changing the product code creates a mismatch between the product code and the UUID.

If the product code is updated and you notice a mismatch between the product code and UUID inside your catalog, see Marketing Cloud Engagement Einstein Recommendations - Remove Current Catalog.

Einstein Recommendations Customer Profile Dashboard

Review a customer profile from this dashboard. Expand the view for greater detail or make changes to the customer privacy setting.

The top section of the dashboard shows recent items purchased, viewed, and added to a cart by the customer. This section includes a picture and name of the item and its SKU.

Summary   Recs   Recs By Scenario   Email   Site Details   **Contacts**   Admin Tools

Email
dfrugoli@salesforce.com   [Go]   [Load My Profile]   [Load Random Profile]

Last Update: 06/12/2018 at 02:22AM

Purchases

4090100 - ENDURO PLUS PACK	4012100 - VAULT BACKPACK	504500 - ETREX 30X TOPO BUNDLE	1857100 - MEN'S VERBERA HIKER GTX	2119100 - WOMEN'S SUPER ZEPHYRUS HOODIE

Views

1857100 - MEN'S VERBERA HIKER GTX	500600 - TRAILFIT BLAZE	2119100 - WOMEN'S SUPER ZEPHYRUS HOODIE	504500 - ETREX 30X TOPO BUNDLE

Cart

1857100 - MEN'S VERBERA HIKER GTX	2119100 - WOMEN'S SUPER ZEPHYRUS HOODIE

The next section shows the top attributes of products the customer purchased, viewed, or added to a cart. This section includes a graphic representation of the top customer affinities. Larger rectangles indicate a stronger affinity.

Attributes
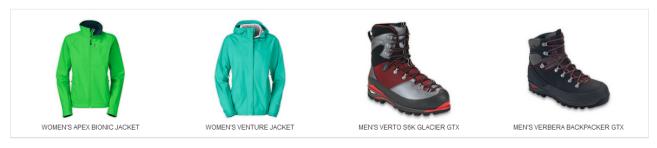
Attribute	Value
camping	true
hiking	true
biking	true
mens	true

Affinity

Category Affinities ❓

Attributes

- ImageLink
- Related_Activity
- Category
- Product_Subcat...
- Product_Cat...
- K...

Top Overall Affinities ❓

	Category
1	Related_Activity: Climbing
2	ImageLink: https://s3-us-west-2.amazonaws.com/nto-products/products370/2119100.jpg
3	ImageLink: https://s3-us-west-2.amazonaws.com/nto-products/products370/1857100.jpg
4	Product_Subcategory: footwear
5	Category: Mens-footwear

The next section shows a picture and the name of each product recommended to the customer according to the rules you configured.

Recommendations for` 0kduav - Abandoned Recommendations

| WOMEN'S APEX BIONIC JACKET | WOMEN'S VENTURE JACKET | MEN'S VERTO S6K GLACIER GTX | MEN'S VERBERA BACKPACKER GTX |

Recommendations for` 0kdv09 - Post-Purchase Recommendations

| WOMEN'S VENTURE JACKET | WOMEN'S DENALI JACKET | WOMEN'S APEX BIONIC JACKET | WOMEN'S ST VIXEN JACKET |

Recommendations for` 576aa0be641b4052ac000000 - Product Recs

| WOMEN'S VENTURE JACKET | WOMEN'S DENALI JACKET | WOMEN'S APEX BIONIC JACKET | WOMEN'S ST VIXEN JACKET |

Recommendations for` 582b7f7a22f0de2553000000 - Weekly Newsletter Recommendations

Use the buttons to expand the profile to view the code version of information in the dashboard or to manage privacy settings. See Manage Einstein Recommendations Customer Profile Data Privacy on page 345 for more details about privacy settings for Einstein Recommendations.

| WOMEN'S VENTURE JACKET | WOMEN'S DENALI JACKET | WOMEN'S APEX BIONIC JACKET | WOMEN'S ST VIXEN JACKET |

View Full Profile for dfrugoli@salesforce.com

| Delete Profile | Apply Do Not Process | Apply Do Not Track | Apply Do Not Profile | Apply Delete Suppression |

The expanded view displays the code version of the customer profile. If a privacy setting is enabled for the customer profile, a number code appears on the last line of the code.

- 1 - Do Not Track
- 2 - Do Not Profile
- 3 - Do Not Track and Do Not Profile
- 4 - Do Not Process
- 5 - Do Not Track and Do Not Process
- 6 - Do Not Profile and Do Not Process
- 7 - Do Not Track, Do Not Profile, and Do Not Process

_id: 3b8534ee-ffbb-11e6-838c-22000ae49c64

timestamp: 2018-06-12 02:22:14 UTC

ip: 3514129686

session: 5903cf80-6de7-11e8-9c30-22000afdcc9c

has_events: true

views: [1857100 1857100 1857100 500600 1857100 2119100 2119100 504500]

purchases: [4090100 4012100 504500 1857100 2119100]

unscored_affinity_purchases: [ ]

t: {
    camping: true
    hiking: true
    biking: true
    mens: true
}

lifetime_affinity: {
    affinity:
{"Product_Category"=>{"weight"=>-1.862832061164748, "values"=>[{"value"=>"Womens", "affinity"=>0.2557658544399369}, {"value"=>"Mens", "affinity"=>0.2481134506569364}, {"value"=>"Electronics", "affinity"=>0.22396623091607487}, {"value"=>"Gear", "affinity"=>0.043941266394167164}, {"value"=>"Kids", "affinity"=>0.009736539027820961}]}, "Keywords"=>{"weight"=>-2.7264542687937166, "values"=>[{"value"=>"hiking", "affinity"=>0.1873886433088463}, {"value"=>"durable", "affinity"=>0.0820017481994015}, {"value"=>"training", "affinity"=>0.0820017481994015}, {"value"=>"rainwear", "affinity"=>0.0820017481994015}, {"value"=>"gps", "affinity"=>0.07257885817203025}, {"value"=>"running", "affinity"=>0.06850773714150524}, {"value"=>"camping", "affinity"=>0.06846646573261148}, {"value"=>"cold weather", "affinity"=>0.06615718605921625}, {"value"=>"treking", "affinity"=>0.012923901880637405}, {"value"=>"backpacking", "affinity"=>0.01199124916760171}, {"value"=>"wearables", "affinity"=>0.005970342013031385}, {"value"=>"lifestyle", "affinity"=>0.004417014981195247}, {"value"=>"insulated", "affinity"=>0.004132927797812554}, {"value"=>"casual", "affinity"=>0.002863687949359163}, {"value"=>"climbing", "affinity"=>0.0016321422478124555}, {"value"=>"messenger bag", "affinity"=>0.0016321422478124555}, {"value"=>"windwear", "affinity"=>0.000310884237678563}]}, "Related_Activity"=>{"weight"=>-1.6884947618598998, "values"=>[{"value"=>"Climbing", "affinity"=>0.28621459870639687}, {"value"=>"Camping", "affinity"=>0.24599938039930822}, {"value"=>"hiking", "affinity"=>0.1799847114200769}, {"value"=>"Hiking", "affinity"=>0.02774641821281175}, {"value"=>"running, hiking, walking", "affinity"=>0.016915969036922256}, {"value"=>"Biking", "affinity"=>0.009443517777693824}]}, "Product_Subcategory"=>{"weight"=>-1.7998778246140419, "values"=>[{"value"=>"footwear", "affinity"=>0.2717151966747492}, {"value"=>"jackets", "affinity"=>0.23323554576286437}, {"value"=>"handheld-gps", "affinity"=>0.16306874238315472}, {"value"=>"bags-backpacks", "affinity"=>0.031386618852976556}, {"value"=>"activity-tracker", "affinity"=>0.014499402031647656}, {"value"=>"pants-shorts", "affinity"=>0.011415669207556834}, {"value"=>"shirts-sweaters", "affinity"=>0.0007550045772193672}]}, "Category"=>{"weight"=>-1.7979429971254786, "values"=>[{"value"=>"Mens-footwear", "affinity"=>0.2717151966747492}, {"value"=>"Womens-jackets", "affinity"=>0.23546669159563005}, {"value"=>"Electronics-handheld-gps", "affinity"=>0.16306874238315472}, {"value"=>"Gear bags-backpacks", "affinity"=>0.02774641821281175}, {"value"=>"Electronics-activity-tracker", "affinity"=>0.014499402031647656}, {"value"=>"Kids pants-shorts", "affinity"=>0.011415669207556834}, {"value"=>"Men jackets", "affinity"=>0.00356739662736151}]}, "ImageLink"=>{"weight"=>-1.6524483911977017, "values"=>[{"value"=>"https://s3-us-west-2.amazonaws.com/nto-products/products370/2119100.jpg", "affinity"=>0.28621459870639687}, {"value"=>"https://s3-us-west-2.amazonaws.com/nto-products/products370/504500.jpg", "affinity"=>0.16306874238315472}, {"value"=>"https://s3-us-west-2.amazonaws.com/nto-products/products370/2001100.jpg", "affinity"=>0.016915969036922256}, {"value"=>"https://s3-us-west-2.amazonaws.com/nto-products/products370/504600.jpg", "affinity"=>0.016915969036922256}, {"value"=>"https://s3-us-west-2.amazonaws.com/nto-products/products370/500600.jpg", "affinity"=>0.016915969036922256}]}]}

    updated_at: 2018-06-12 02:37:27 UTC

    affinity_cart_marked: ["1857100", "2119100"]
}

cart: {
    items: ["2119100", "1857100"]
    amounts: [159.2, 144.0]
    quantities: [0.0, 0.0]
    timestamp: 2017-07-25 11:07:00 UTC
}

Delete Profile	Apply Do Not Process	Apply Do Not Track	Apply Do Not Profile	Apply Delete Suppression

Einstein Recommendations Privacy Status Dashboard

View the Personalization Builder privacy status dashboard to track the processing of customer privacy option requests.

View an Einstein Recommendations Customer Profile

View a customer profile in Einstein Recommendations.

Configure the Data Suppression Period for Einstein Recommendations

The default suppression period before deleting a customer profile is 14 days. During the suppression period, the system holds existing data but doesn't collect more. At the end of the suppression period, all profile data is deleted. You can change the default suppression period.

Manage Einstein Recommendations Customer Profile Data Privacy

To honor subscriber privacy and data protection preferences, manage consent, data deletion, and restriction of processing for a customer profile in Einstein Recommendations. To export Einstein Recommendations data, contact your account executive for assistance.

Einstein Recommendations Privacy Status Dashboard
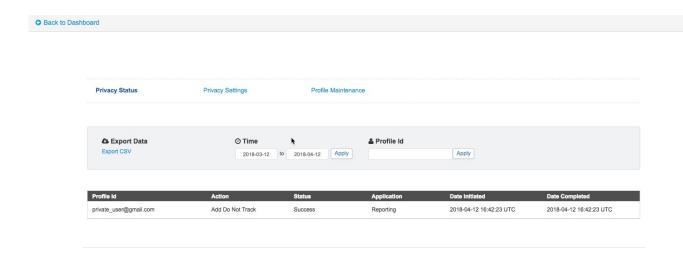
View the Personalization Builder privacy status dashboard to track the processing of customer privacy option requests.

The dashboard display includes:

- The customer's emails address
- Requested privacy option
- Status for processing the request
- Where the option is applied
- The date the request was initiated
- The date the request was completed

Follow these steps to view the Einstein Recommendations privacy status dashboard.

1. Select either **Email Recommendations** or **Web Recommendations** under Einstein.

2. Click the **Reporting** tab.

3. Click **Admin Tools**.

4. Click **Privacy Status**.

5. Enter a profile ID or date range.

6. Click **Apply**.

💡 Tip: You can view a maximum of 100 instances in the dashboard. For longer lists, export to a CSV file.

View an Einstein Recommendations Customer Profile

View a customer profile in Einstein Recommendations.

1. Click the **Reports** tab within Einstein Recommendations.

2. Click **Contacts**.

3. Enter the customer's email address.

4. Click **Go**.

> 💡 Tip: To view a random customer profile, click **Load Random Profile**.

Configure the Data Suppression Period for Einstein Recommendations

The default suppression period before deleting a customer profile is 14 days. During the suppression period, the system holds existing data but doesn't collect more. At the end of the suppression period, all profile data is deleted. You can change the default suppression period.

1. In Einstein Recommendations, select either **Email Recommendations** or **Web Recommendations**.

2. On the Report tab, click **Admin Tools**.

3. Click **Privacy Settings**.

4. Enter the number of days for the suppression period, up to 30 days.

5. Save the configuration.

Manage Einstein Recommendations Customer Profile Data Privacy

To honor subscriber privacy and data protection preferences, manage consent, data deletion, and restriction of processing for a customer profile in Einstein Recommendations. To export Einstein Recommendations data, contact your account executive for assistance.
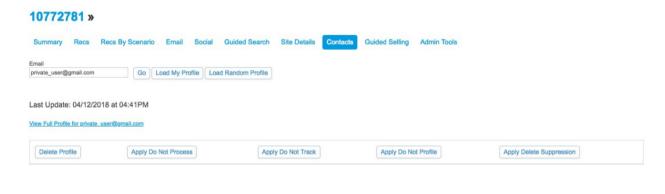
For details about the contact information stored in Einstein Recommendations, see Customer Profiles on page 339.

1. Under Einstein Recommendations, select either **Email Recommendations** or **Web Recommendations**.

2. On the Reporting tab, click **Contacts**.

3. Enter the customer's email address, and click **Go**.

4. Scroll to the bottom of the customer profile and click the button that corresponds with the requested privacy setting.

- **Delete Profile**: Permanently deletes the customer profile including all past behavioral data.
- **Delete Suppression**: Set a period to delay data deletion for up to 30 days of the request.
- **Do Not Track**: Retains past behavioral data, but future interactions are ignored.
- **Do Not Profile**: Collects behavioral data but it's not used for recommendations.
- **Do Not Process**: Retains past behavioral data, and future interactions are collected but ignored.

5. Click **OK**.

To remove Do Not Track, Do Not Profile, or Do Not Process restrictions, click the corresponding button again. To remove or change a suppression period, see Configure Suppression for Personalization Builder on page 345.

Privacy settings configured in Einstein Recommendations are also applied to Web & Mobile Analytics but not Contact Builder. To view the status of the request, go to the Personalization Builder Privacy Status Dashboard on page 344.

Einstein Recommendations Integrations

Integrate data gathered through Einstein Recommendations with Audience Builder and Contact Builder.

- Audience Builder: Create customer segments using complex data dimensions.
- Contact Builder: Provide a single view of the customer across all channels.

Review these prerequisites to integrate Einstein Recommendations.

- Configure at least one catalog and Collect Tracking Code.
- Enable Einstein Recommendations data extensions.
- To run the scripts that begin building dimensions, contact your account executive with at least four days of advance notice.

Integration with Audience Builder

Learn how the data from Einstein Recommendations integrates with Audience Builder. You can use this data to filter and segment subscribers.

Einstein Recommendations Integration with Contact Builder

Einstein Recommendations passes raw data gathered via the Collect Tracking Code into Contact Builder. The data is organized in up to eight data extensions that enable you to search and filter information. Data is available to all tools that integrate with Contact Builder.

Integration with Audience Builder

Learn how the data from Einstein Recommendations integrates with Audience Builder. You can use this data to filter and segment subscribers.

The Einstein Recommendations integration with Audience Builder provides a set of standard ecommerce dimensions based on these data points:

- Products Purchased
- Products Browsed
- Search Term
- Visits and User Affinity

Each dimension provides filter categories used to segment an audience that you can export into Email Studio for targeted campaigns. These filter categories are included.

Products Purchased	Products Browsed	Search Term	Visits and User Affinity
Product Name (LTD)	Browse Event Count (LTD)	Search Browse Event Count	Days Since Last Visit
Product Name (30, 60, 90 days)	Name	Term	Average Days between Visits
Purchased Date	SKU	Date	Average Time on Site
Purchased Days (date range)	Date	Days	Behavioral User Affinity
Product SKU	Days		
Product SKU (30, 60, 90 days)	Attribute		
Attribute			
Days Since Last Purchase			
Average Order Value			
Average Days Between Purchases			

Einstein Recommendations Integration with Contact Builder

Einstein Recommendations passes raw data gathered via the Collect Tracking Code into Contact Builder. The data is organized in up to eight data extensions that enable you to search and filter information. Data is available to all tools that integrate with Contact Builder.

Here are the possible data extensions.

Data Extension	Name	Description
Products	IGO_PRODUCTS	Standard product data is imported via the product catalog.
Product Attributes	IGO_PRODUCTATTRIBS	Extra product metadata imported via the product catalog.
Customer Profiles	IGO_PROFILES	Top-five attribute preferences for a subscriber based on items viewed, placed in cart, or purchased.

Data Extension	Name	Description
Purchases	IGO_PURCHASES	User-specific product purchase data.
Views	IGO_VIEWS	User-specific product view data.
Abandoned Cart	PI_ABANDONED_CART_EVENT	Not in use.
Abandoned Items	PI_ABANDONED_CART_ITEMS	Not in use.
Content	PI_CONTENT	Standard content data is provided via the content catalog.
Content Attributes	PI_CONTENTATTRIBS	Extra content metadata imported via the content catalog.
Content Views	PI_CONTENTVIEWS	User-specific content view data.
User Sessions	PI_SESSIONS	Not in use.
Session End	PI_SESSION_ENDS	Event that is triggered when a user closes a browser session.
Predictive Scores	PREDICTIVE_SCORES	Scores are based on analysis of previous data and events.

Find these data extensions in the SFMC Default DE's folder. You can move these data extensions to a subfolder within the same MID. After enablement, these data extensions hold data about catalog items uploaded or streamed from the Collect Tracking Code installed on a website. This information includes recorded user interactions.

⚠ Warning: Don't delete these data extensions.

You can't alter or delete the Session Ends, Abandoned Cart Items, and Abandoned Cart Events data extensions.

To manage privacy settings via the API, review the Personalization Builder API developer documentation.

Turn On Einstein Recommendations Data Extensions
Enable Einstein Recommendations to populate data extensions in Contact Builder.

Customer Profile Data Extension in Einstein Recommendations
Einstein Recommendations customer profile data extensions store the top five attributes for customer affinity based on behavioral data. The profile updates at the end of every customer session. You can delete a customer profile at any time.

Content

Learn how Einstein Recommendations store data in the content data extension.

Content Attributes

Learn how Einstein Recommendations stores information in the content attributes data extension.

Content Views

Learn how Einstein Recommendations stores information in the content views data extension.

Product Attributes

Learn how Einstein Recommendations data are stored in the product attributes data extension.

Products

Learn how data gathered in Einstein Recommendations is stored in the products data extension.

Purchases

Data from purchases monitored in Einstein Recommendations is stored in the Purchases data extension.

Views

Learn how Einstein Recommendations stores data in the Views data extension.

Turn On Einstein Recommendations Data Extensions

Enable Einstein Recommendations to populate data extensions in Contact Builder.

1. Navigate to the Status tab in Einstein Recommendations.

2. Click .

3. Click **Data Extension Settings**.

4. Toggle on **Enable Einstein Data Extensions**.

5. Click **Save**.

Customer Profile Data Extension in Einstein Recommendations

Einstein Recommendations customer profile data extensions store the top five attributes for customer affinity based on behavioral data. The profile updates at the end of every customer session. You can delete a customer profile at any time.

📝 **Note:** Einstein Recommendations is also known as Predictive Intelligence.

Field Attribute	Definition
user_id	System-assigned ID for a user
email	User email address; to apply the Personalization Builder Integrations on page 347, you must use the user's email address. For privacy reasons, we recommend using a non-PII identifier or hashing the email.
city	Customer's city based on IP address
region	Customer's region, province, or state based on IP address
country	Customer's country based on IP address

Field Attribute	Definition
attribute1:attribute5	Include the attribute type that the affinity is categorized under, as defined in the catalog such as category, color, or size. These attributes are ordered according to the relative affinity weight of each attribute within a customer's profile.
value1:value5	Include a specific instance of the attribute type ordered from highest to lowest according to the relative affinity weight in a subscriber's profile.

📝 **Note:** Field attributes in this extension vary according to requirements specific to your catalog and algorithms applied.

Content

Learn how Einstein Recommendations store data in the content data extension.

Field Attribute	Definition
content_id	System-assigned ID for a content item
availability	Indicates if a piece of content is live on the website.
title	Title of a piece of content
UUID	System-assigned ID for the product

Content Attributes

Learn how Einstein Recommendations stores information in the content attributes data extension.

Field Attribute	Definition
content_id	Required: Assigned ID for a content item
updated_at	Required: Exact date and time a piece of content was last updated
attribname	Optional: Category, type, genre, and so on, for a piece of content
attribvalue	Optional: Unique instance of the attribute type that is associated with the content

📝 **Note:** Field attributes in this data extension vary according to your catalog's specific requirements.

Content Views

Learn how Einstein Recommendations stores information in the content views data extension.

Field Attribute	Definition
content_id	System-assigned ID for a content item
user_id	System-assigned ID for a specific user
session_id	System-assigned unique ID for a specific user session
search	Search terms entered into your website by customers, or category associated with the search term
timestamp	Exact date and time of the recorded view

Product Attributes

Learn how Einstein Recommendations data are stored in the product attributes data extension.

Field Attribute	Definition
sku	Required: SKU number of the product
attribname	Optional: Category, type, class, and so on, of a product
attribvalue	Optional: A unique instance of the attribute type that is associated with the product
updated_at	Optional: Timestamp of the most recent catalog update

📝 **Note:** Field attributes in this extension vary according to requirements specific to your catalog and aren't limited to the optional fields listed here.

Products

Learn how data gathered in Einstein Recommendations is stored in the products data extension.

Field Attribute	Definition
name	Name of the product
regPrice	Regular price of the product
salePrice	Sale price of the product
UUID	System-assigned ID for the product
sku	SKU number

Purchases

Data from purchases monitored in Einstein Recommendations is stored in the Purchases data extension.

Field Attribute	Definition
sku	SKU number for the product purchased
price	Price of the product purchased
quantity	Quantity of specific product purchased
order_summary	Number associated with this purchase
user_id	System-assigned ID for a specific user
timestamp	Exact date and time of the purchase

Views

Learn how Einstein Recommendations stores data in the Views data extension.

Field Attribute	Definition
sku	SKU number for the product viewed by the customer.
user_id	System-assigned ID for a specific user.
session_id	System assigned unique ID for a specific user session.
search	Search terms entered into your website by customers.
timestamp	Exact date and time of the recorded view.

Einstein Recommendations Status Console

Einstein Recommendations Status Console monitors the Collect Tracking Code and catalog imports for common implementation errors. View where an error occurred and the details to help resolve the issue. This feature helps ensure that the Einstein Recommendations engine receives the data necessary to power optimal Einstein Recommendations and behavioral triggers for campaigns and journeys.

Many errors or a spike in errors indicates that something has changed, such as a catalog import failed to import with new products. These changes generate errors in views, carts, and conversions because they don't match. If there's an issue to resolve, an alert appears in the status column. To view the error and take steps to fix the issue, click the link in the description column.

The Status Console shows incoming Collect Tracking Code data by call type.

The number of products with errors is limited to 100 SKUs. If you're experiencing a problem with hundreds of errors, continually check for new errors because you aren't notified when there's an increase in errors or decrease in traffic.

💡 Tip: We recommend that you review error rates on a weekly or monthly basis.

Configure Einstein Recommendations Error Email Notifications
Set up and enable email notifications in case Collect Tracking Code stops working in Einstein Recommendations.

Configure Einstein Recommendations Error Email Notifications

Set up and enable email notifications in case Collect Tracking Code stops working in Einstein Recommendations.

1.

In Einstein Recommendations, on the Status tab, click ⚙▾ and select **Notification Settings**.

2. Enter at least one email address.

3. Select the number of hours to wait before alerting that data collection has stalled.

4. Enter the Collect Tracking Codes to monitor.

5. Save your changes.

Fix an Einstein Recommendations Implementation Error

You can fix an implementation error from the Einstein Recommendations status console. You must fix each error individually.

1. In the Details column, click the error link.

> 📝 Note: Clicking Mark as Resolved before going through the troubleshooting steps doesn't fix the error. Follow the instructions presented when you click the error link.

2. Click **Take these steps to troubleshoot error**, and complete the steps.

3. Click **Mark as Resolved**.
The alert in the status console changes to OK. If the error reoccurs, the alert reappears in the status console.

Einstein Recommendations Rule Manager

Use Rule Manager to refine Einstein Recommendations for email and web.
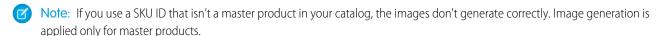
You can create rules for these things:

- All web and email recommendations.
- Specific SKUs with the ability to search the attribute field within the catalog.
- Product or content release date using the release date field in the catalog.
- Greater-than or less-than rules for numeric values such as dates, prices, and ratings.

Contact Events are conditional statements to fulfill actions in rules only when the user meets specified criteria, such as:

- Past purchase includes a chosen attribute value.
- Past view includes a chosen attribute value.
- The last visit was greater than or less than X days ago.

Content Attributes are conditional statements to fulfill actions in rules only when the content being viewed meets specified criteria. All catalog attributes are available. Rules must reference the item SKU ID in the recommendation call to work properly. Attributes are case-sensitive.

> 📝 Note: If you use a SKU ID that isn't a master product in your catalog, the images don't generate correctly. Image generation is applied only for master products.

The Actions section is the heart of the Rule Manager and lets you add business logic to the recommendation engine. The Rule Manager limits or filters out recommendations based on a condition or makes certain characteristics more or less likely to be recommended in a call.

Rule Manager Options
To refine your email and web recommendations, use the rules in Einstein Recommendations Rule Manager.

To create your own algorithm, use rules in the Einstein Recommendations Rule Manager tool. A rule can override top-performing algorithms and negatively impact predictive performance, so we recommend that you use rules sparingly.

Configure a rule to refine Einstein Recommendations.

Rule Manager Options

To refine your email and web recommendations, use the rules in Einstein Recommendations Rule Manager.

Rule	Description
Search	Displays all rules containing the search term.
Configure New Rule	Creates a rule.
Name	Unique name for the rule.
Context	Determines where you can apply the rule.
Status	Indicates whether the rule is active or inactive.
Gears: Configure	Edits the rule.
Gears: Settings	Configures advanced rule settings.
Gears: Duplicate	Duplicates the rule.
Gears: Delete	Permanently removes the rule.
Previous or Next	Displays the previous 20 or next 20 rules.

Common Einstein Recommendations Rule Types

To create your own algorithm, use rules in the Einstein Recommendations Rule Manager tool. A rule can override top-performing algorithms and negatively impact predictive performance, so we recommend that you use rules sparingly.

Scope	Rule	Syntax
Global Rule		
	Never recommend gift cards to customers.	ACTION Exclude where <GiftCard> <is> <Y>
	Recommend highly rated items to users.	ACTION Emphasize Items with <Ratings> <Greater Than> <3>
Home Page Rule		

Scope	Rule	Syntax
	Emphasize the newest items on the home page.	ACTION Emphasize Items with <ReleaseDate> <Less Than> <30> Days Ago
Category Page Rules		
	Only recommend items with the same category as the landing page that the subscriber is viewing.	ACTION Include Items with <Category> <is> <Same as Reference Item>
Detail Page Rule		
	Only recommend items of the same gender as the item that the subscriber is viewing.	ACTION Include <Gender> <is> <Same as Reference Item>
	Only recommend sale items when the subscriber views a sale item.	ATTRIBUTE <isOnSale> <is> <False> ACTION Exclude <isOnSale> <is> <True>
	Exclude items based on intended age group.	ATTRIBUTE <AgeGroup> <is> <Child> ACTION Exclude <Inappropriate> <is> <True>
Exclude items based on intended age group.		
	Don't recommend a competing brand on a detail page.	ATTRIBUTE <Brand> <is> <Nike> ACTION Exclude <Brand> <is> <Adidas>
	Only recommend items of the same brand as the item that's being viewed.	ACTION Include <Brand> <is> <Same as Reference Item>

Configure a Rule

Configure a rule to refine Einstein Recommendations.

1. Set Where to Apply the Rule
   Determine where the rule is applied.

2. Set When to Apply the Rule
   Determine which subscriber behaviors to apply the rule to.

3. Set How the Rule Is Applied
   Determine how the rule is applied.

4. How to Prioritize and Apply Einstein Recommendations Rules
   You can determine the priority of your Einstein Recommendations rules and where to apply them.

5. Configure Advanced Rule Settings
   Add advanced settings for the rule.

6. Validate the Rule Configuration

   Confirm that the personalization for an Einstein Recommendation is configured correctly.

Set Where to Apply the Rule

Determine where the rule is applied.

1. Choose a catalog type to use.

2. Choose where to apply the rule.

   You can drag-and-drop specific pages or email messages into the rule canvas to restrict application of the rule to those areas.

> 📝 **Note:** As you configure your rule, the rule text section dynamically building a sentence to match the configuration.

Set When to Apply the Rule

Determine which subscriber behaviors to apply the rule to.

1. Select **Events & Attributes**.

2. Drag a Contact Event, Category, or Search parameter onto the rule canvas.

3. Select an operator.

4. Select an attribute type.

5. Select a value.

6. Drag an attribute into the rule canvas.

7. Select a tag field.

8. Select an operator.

9. Select a value.

Set How the Rule Is Applied

Determine how the rule is applied.

1. Select **Actions**.

2. Drag an action onto the rule canvas.

3. Select the catalog attribute to be acted upon.

4. Select the operator.

5. Select the catalog attribute value.

6. Select how much influence you want the rule to have on determining recommendations.

How to Prioritize and Apply Einstein Recommendations Rules

You can determine the priority of your Einstein Recommendations rules and where to apply them.

Choose from these Rule Manager Actions.

Operator	Impact on Recommendations	Example
Emphasize	Increase the importance of a specific attribute value.	For web recommendations: When on the home page, emphasize items where ReleaseDate occurs within the last 30 days.
Exclude	Don't allow items with a specific attribute value to be displayed.	For email recommendations: Exclude items where RegularPrice is less than $20.00.
Include	Only display items with an attribute value that matches the item being viewed.	For web recommendations: When on the detail page. include items when the category is the same as the reference item.
Inject	Manually force selected items to return within the recommendations.	For web recommendations: When on the cart page, If BrandName is Northern Trails, inject BannerID Northern-Trails-ShippingOffer.
Allow (only x)	Limit the number of items that are returned with a specific attribute value.	For web recommendations: When on the home page, allow only two Items if OnSale is TRUE.
Allow (only x of any	Limit the number of items with matching attribute values that are returned.	For web recommendations: When on any page and email recommendations of any campaign, allow only two items of the same BrandName.

Configure Advanced Rule Settings

Add advanced settings for the rule.

1. To view the advanced settings section, click the gear icon.

2. If you don't want the rule to take effect immediately, set the **Rule Start/Expiration Dates**.

3. To chance the rule's status, click **Active/Inactive**.

4. Save the settings.

Validate the Rule Configuration

Confirm that the personalization for an Einstein Recommendation is configured correctly.

Review the Rule Text to verify that it's consistent with your expected result before saving each rule. To test the rule, make a recommendation call and review the predictive content generated to verify that it meets your expectation.

Einstein Recommendation Scenarios

These scenarios help you produce Einstein Recommendations for email or the web in Marketing Cloud Engagement.

💡 Tip: To apply custom logic to a scenario, use Rule Manager.

Reference Item Scenarios

These scenarios require one or more specific reference items. These items typically include a value passed in a SKU or CATEGORY parameter via a recommendation call or email HTML content.

Scenario	Description	Catalog Field Requirement	Collect Field Requirement
Bought Bought	Subscribers or visitors who bought the item passed in the parameter also bought these items.	SKU ProductCode	trackConversion
Bought Bought Merge	Subscribers or visitors who bought any of the items passed in the parameter for this cart also bought these items.	SKU ProductCode	trackCart trackConversion
Click Bought	Subscribers or visitors who clicked the item passed in the parameter also bought these items.	SKU ProductCode	trackPageView trackConversion
Category Bought	Subscribers or visitors who viewed an item in the category attribute passed in the `category=` parameter also bought these items.	SKU ProductCode	trackPageView trackConversion
Category View	Subscribers and visitors who viewed an item in the category attribute passed in the `category=` parameter also viewed these items.	SKU ProductCode ContentID	trackPageView
Search Bought	Subscribers or visitors who used the search term passed in a `search=` parameter bought these items.	SKU ProductCode	trackPageView trackConversion
Search View	Subscribers or visitors who used the search term passed in a `search=` parameter viewed these items.	SKU ProductCode ContentID	trackPageView
Tag	The most popular item based on purchases, clicks, or views with the attribute passed in the `category=` parameter. When no attribute is passed, but the `item` parameter is included, the system chooses a reference item tag value at random.	SKU ProductCode ContentID Attribute	trackPageView

Scenario	Description	Catalog Field Requirement	Collect Field Requirement
Tag Intersection	Most popular items with an intersection of attributes that match the attributes of the parameter value for the item viewed by the subscriber or visitor.	SKU ProductCode ContentID Attribute	trackPageView
Tag Recent	Newly available items with the attribute passed in the `category=` parameter. When no attribute is passed, but the `item` parameter is included, the system chooses a reference item tag value at random.	SKU ProductCode ContentID Attribute Release Date	trackPageView
Tag Enjoyed	Most viewed and purchased items with the attribute passed in the `category=` parameter. When no attribute is passed, the system chooses a reference item tag value at random. Use at least one Collect field.	SKU ProductCode ContentID Attribute	trackPageView trackCart trackConversion
Tag Top Rated	Top rated item with the attribute passed in the `category=` parameter. When no attribute is passed, the system chooses a reference item tag value at random.	ContentID Attribute Rating	trackPageView
View Bought	Subscribers or visitors who viewed the item passed in the parameter also bought these items.	SKU ProductCode	trackPageView trackConversion
View View	Subscribers or visitors who viewed the item passed in the parameter also viewed these items.	SKU ProductCode ContentID	trackPageView
View View Merge	Subscribers or visitors who viewed any of the items passed in the parameter for this cart also viewed these items.	SKU ProductCode	trackPageView trackCart

User Data Scenarios

These scenarios are based on a user's Predictive Intelligence profile and personal site behavior.

Scenario	Description	Catalog Field Requirement	Collect Field Requirement
Bought Bought Last Cart	Subscribers or visitors who bought the last item added to the cart also bought these items.	SKU ProductCode	trackCart trackConversion
Bought Bought Last Purchase	Subscribers or visitors who bought the item last purchased also bought these items.	SKU ProductCode	trackConversion
Favorite Tag	Most popular items with attributes that match the subscriber's or visitor's interest based on their affinity profile. These recommendations are based on the user's top affinity. Returns the most popular items that match the single top tag on their weighted affinity graph.	SKU ProductCode ContentID Attributes	trackPageView
Last Views Merge	Subscribers or visitors who viewed any of the last 7 items viewed by this subscriber or visitor also viewed these items.	SKU ProductCode ContentID	trackPageView
Recently Viewed	Any of the last 7 items viewed by the subscriber or visitor.	SKU ProductCode ContentID	trackPageView
User Affinities	Recommendations based on the user's complete affinity profile. Returns items that match the top five affinities listed in their contact profile, based on purchases, clicks, and views over time. Preference is given to items that are tagged with multiple attributes on the top five affinity list.	SKU ProductCode ContentID Attributes	trackPageView
View Bought Last Cart	Subscribers or visitors who viewed this item in a cart also bought these items.	SKU ProductCode	trackPageView trackCart trackConversion
View Bought Last Purchase	Subscribers or visitors who viewed the item last purchased by this subscriber or visitor also bought these items.	SKU ProductCode	trackPageView trackConversion

Scenario	Description	Catalog Field Requirement	Collect Field Requirement
View View Last Cart	Subscribers or visitors who viewed this item in the cart also viewed these items.	SKU ProductCode	trackPageView trackCart
View View Last Purchase	Subscribers or visitors who viewed the item last purchased by the subscriber or visitor also viewed these items.	SKU ProductCode	trackPageView trackConversion

Site Data Scenarios

These scenarios are based on the collected aggregated site behavior. No information is personalized at the user level.

Scenario	Description	Catalog Field Requirement	Collect Field Requirement
New Releases	This information includes 100 items across the site where the ReleaseDate parameter is in the past 14 days. The values are sorted by newest date.	SKU ProductCode ContentID ReleaseDate	trackPageView
Top Enjoyed	Most popular products across the site based on a combination of viewed and purchased items.	SKU ProductCode ContentID Attribute	trackPageView trackCart trackConversion
Top Grossing	Highest grossing items in terms of total revenue generated.	SKU ProductCode	trackConversion
Top Sellers	Top selling products across the site based on units sold.	SKU ProductCode	trackConversion
Top Views	Up to 100 of the most viewed items across the site.	SKU ProductCode ContentID	trackPageView

Waterfall Predictions

Prioritize your recommended scenarios from highest to lowest using waterfall predictions in Einstein Recommendations. In a waterfall prediction, Einstein goes down the list of scenarios and returns all available matching items until it reaches the total number of recommendations that you set. Set up a default site data scenario last in your hierarchy to ensure that Einstein fills the total number of recommendations.

If you choose not to enable waterfall predictions, Einstein returns recommendations only from the first algorithm that provides the total number of recommendations that you set. In this case, you could miss top-priority recommendations if the algorithm doesn't meet the total number set.

👁 **Example:** You set the recommendation number to four items. Because your top priority scenario returns only one recommendation, Einstein moves to the next scenario on the list. It continues down the list until there's a total of four recommended items.

SEE ALSO:

Einstein Recommendation Scenarios

Localized Recommendations

Configure Einstein Recommendations to deliver localized recommendations in multiple languages and currency values from a single business unit.

Localized fields are only accessible through parameters added to recommendation calls.

Localized Catalog Requirements

Add customized fields to your catalog data extension to deliver localized recommendations through Einstein Recommendations.

Include a corresponding localized field for each language to support for all display fields in your catalog. Add the five-character locale value to each localized field. Visit https://www.loc.gov/standards/iso639-2/php/code_list.php for examples.

To display localized pricing, include these fields in your product catalog.

- RegularPrice: This field only accepts a number value formatted for US dollars. Use this field to set rules in Rule Manager.
- RegularPriceDisplay: Add this attribute field and configure it to accept string values.
- SalePrice: This field only accepts a number value formatted for US dollars. Use this field to set rules in Rule Manager.
- SalePriceDisplay: Add this attribute field and configure it to accept string values.

👁 Example:

Localized Email Recommendation Displays

To create recommendation displays with localized pricing, use the `RegularPriceDisplay` and `SalePriceDisplay` attributes to ensure that the system displays correctly formatted pricing information.

Localized Email Recommendation Calls

To return localized recommendations, append the locale parameter to the email link. Match the locale parameter to the five-character values used in the catalog field names.

💡 **Tip:** Use all lowercase for `locale=` values in email recommendations.

👁 Example:

```
<a href=https://MID.recs.igodigital.com/rr/v2/hash/1/l/EMAIL?locale=fr-fr">
   <img src=https://MID.recs.igodigital.com/rr/v2/hash/i/1/EMAIL?locale=fr-fr" />
</a>
```

Localized Web Recommendation Calls

The system returns the localized display field when a web recommendation call is made when you append the locale parameter. Match the locale parameter to the five-character value used in your catalog field names.

👁 **Example:** To display a page localized for a french speaker in France, add locale=fr-FR.

👁 **Example:** `https://MID.recs.igodigital.com/a/v2/MID/PAGE/recommend.json?locale=fr-FR`

Einstein Recommendations Reports

Learn about reports available in Einstein Recommendations.

📝 **Note:** Execute Einstein Recommendations reporting at the page or campaign and scenario logic level. The custom querying and large data sets for user and SKU or attribute level reporting must be scoped separately and can require a one-time or term services engagement.

Site Metrics	Influenced Metrics	Recommendation Direct Metrics
	Calculated from sessions during which a subscriber clicked an Einstein Recommendation.	Calculated from items sold when a subscriber clicked an Einstein Recommendation and made a purchase within the same session.
• Visits (Sessions)	• Influenced Sessions	• Direct Orders
• Orders	• Influenced Orders	• Direct Items Sold
• Items Sold	• Influenced Revenue	• Direct Revenue
• Revenue	• Influenced Conversion Rate	• Revenue per Thousand Impression
• Conversion Rate	• Influenced AoV	
• AoV	• Influenced Revenue per Session	
• Revenue per Session	• Recommendation Displays	
• Impressions	• Recommendation Clicks	
• Impressions per Visit		

Dashboard Tabs

Learn about the dashboard tabs in Einstein Recommendations reports.

Einstein Recommendations Report Fields

See a list and description of all fields in the Einstein Recommendations reports.

Einstein Recommendations Reports FAQs

Get the answers to frequently asked questions about Einstein Recommendations reports.

Dashboard Tabs

Learn about the dashboard tabs in Einstein Recommendations reports.

Tab	Description
Summary	Provides a high-level view of Einstein Recommendations for email and the web. You can select the time frame, view the data as a graph, and choose the export format.
Recs and Recs by Scenario	Web recommendation metrics by page and scenario
Email	Email recommendation metrics are separated by marketing campaigns and triggered campaigns, and by hash code and scenario
Site Details	Full site tracking data by day, including Einstein Recommendations influenced and direct metrics
Contacts	Search for subscribers by email address. View user profile data including affinities, past activity, and current cart items. View affinity attributes and weights for a specific user. If you implemented Collect Tracking Code, you can also use this data by querying the PI_PROFILES data table. • Subscriber top 5 affinity values are shown in the table on the right. These affinities are also held in the profiles data extension when Collect Tracking Code data is integrated for your account. • The left table shows the importance of attributes to the subscriber's site decisions. • Affinities are created through combined purchases, clicks, and views.
Admin Tools	View data for products and lists used within Einstein Recommendations. Search by SKU or ProductCode to: • Show all the item properties reflected by the most current Catalog update. • Manually mark an item out of stock. The Catalog Online Availability field overwrites this value with the next catalog import. • View algorithm lists the item is included in. Search for lists by typing in part of the corresponding scenario logic name, like 'new' or 'bought'. • Einstein Recommendations uses list data connected to each scenario when determining which item to recommend • Search for scenario list and view all current items on that list • Weight represents the item's overall enjoyment score, which is calculated based on purchases, clicks, and views

Retrieve a report in Einstein Recommendations that displays the number of email recommendations by product code. This report is accessible through the email tab in Email Recommendations reporting.

Displays by Item Report

Retrieve a report in Einstein Recommendations that displays the number of email recommendations by product code. This report is accessible through the email tab in Email Recommendations reporting.

This report lists each product code, and the number of the times the product was recommended for each email recommendation configuration and job ID. You can select a data range to view. To associate the job ID and recommendation, the email recommendation image must include a URL parameter named sfmc_j with the email job ID as the value.

Follow these steps to enable tracking for this report.

1. In Einstein Recommendations, navigate to the Admin tab and click **Implementation**.

2. Scroll to the bottom of the page.

3. Select **Activate Email Logging**.

> 📝 **Note:** Allow 24 hours for the system to collect data for this report.

Einstein Recommendations Report Fields

See a list and description of all fields in the Einstein Recommendations reports.

Einstein Email Recommendation Report Fields

> 💡 **Tip:** We recommend testing in a non-production business unit because measures can't be reset.

Email Measure	Description
Influenced Attribution	The total revenue generated during sessions initiated by a subscriber clicking a recommendation or reference item in triggers. This value includes Direct Item Revenue.
Direct Attribution	Number of orders with 7 days of a user click that contain a recommended item or reference item trigger.
Displays	The number of times recommendations are displayed. Tracked by the number of times the recommendation call is made on a website or the first recommendation image renders in an email.
Clicks	The number of clicked recommendations or reference items in triggers.
Click Rate	The percentage of recommendations clicked. This value is comparable to the click-to-open rate for email.
Direct Items	The number of items sold within 7 days of a subscriber clicking a recommendation or reference item in triggers.
Buy Rate	The number of direct items sold over the total number of recommendations.

Email Measure	Description
Site Lift	This percentage represents the impact of predictive recommendations on the site as a whole. It's calculated by taking the percentage increase from the non-influenced conversion rate to the total conversion rate.
Influenced Revenue	Total revenue generated during sessions initiated when a subscriber clicks a recommendation or reference item in triggers. This figure includes Direct Item Revenue.
Direct Item Revenue	Total revenue from conversions within 7 days of a subscriber clicking a recommendation or reference item in triggers.

Einstein Web Recommendation Report Fields

Web Measure	Description
Visits	The number of user sessions.
Items Sold	The number of items purchased through the website.
Direct Order Revenue	Total revenue for purchases that occur within 7 days of a clicked recommendation or reference item in triggers.
Average Order Value	Average value of orders placed.
Direct Item Revenue	Total revenue from conversions that occur within 7 days of a subscriber's clicking a recommendation or reference item in triggers.
Influenced Revenue Percentage	Percentage of revenue generated during sessions initiated by a subscriber clicking a recommendation. This value includes Direct Item Revenue.
Influenced Visits	Number of visits initiated by a subscriber clicking a recommendation that results in a purchase during the same session. This value includes Direct Item Revenue.
Direct Items	Revenue from customers who clicked a product recommendation and purchased it in the same session.
Impressions	Length of time a recommendation is displayed.
Average Order Value Lift	This percentage represents the impact of predictive recommendations on the orders placed on the site. It's calculated by taking the percentage increase from the non-influenced orders to the overall order value.
Performance	A listing of performance broken out by month.
Visits with Orders	Number of visits resulting in a purchase.
Revenue	Total revenue from all purchases.

Web Measure	Description
Impressions per Visit	The average number of times recommendations are displayed per visit.
Conversion Rate	The percentage of clicked recommendations that result in a purchase within 7 days.
Direct Orders	Number of orders with 7 days of a user click that contain a recommended item or reference item trigger.
Influenced Revenue	Total revenue generated during sessions initiated when a subscriber clicks a recommendation or reference item in triggers. This figure includes Direct Item Revenue.
Revenue per Session	Average revenue per session.
Conversion Rate Lift	This percentage represents the impact of predictive recommendations on the site as a whole. It's calculated by taking the percentage increase from the non-influenced conversion rate to the total conversion rate
Influenced Orders	Total orders with revenue generated during sessions initiated by a subscriber's clicking a recommendation or reference item in triggers. This value includes Direct Item Revenue.
Revenue per Session Lift	This percentage represents the overall impact of predictive recommendations on revenue. It shows the percentage increase from the non-influenced revenue per session to the total revenue per session.
Direct Revenue Percentage	The percentage of revenue within 7 days of a user's clicking a recommendation or reference item in triggers.

A web session ends when a visitor leaves the site or is inactive for a period determined by the account setup. The default is 60 minutes. The email attribution session is 7 days after the last click.

Einstein Recommendations Reports FAQs

Get the answers to frequently asked questions about Einstein Recommendations reports.

Where Does Einstein Recommendations Reporting Come From?

Reporting shown in the Einstein Recommendations dashboard comes from the Collect Tracking Code on the account's site. For example, revenue captured at the time of conversion is dependent upon what is passed through Collect Tracking Code rather than pricing in the catalog.

What Is the Site Session Time Used in Einstein Recommendations Reporting? Can I Change This Setting?

You can configure the site session time inside the application under the gear icon in the Admin section. The default session time is 15 minutes. You can adjust it by 15-minute increments up to 3 hours.

What Time Zone Is Used for Einstein Recommendations Reporting?

Einstein Recommendations reporting uses Coordinated Universal Time (UTC). For this reason, orders and metrics from a single date might not match when compared with data from other tracking systems.

Are Recommendation Displays Calculated at the Item or Call Level?

Recommendation displays are calculated at the call level. A single display is tracked, despite the number of recommended items shown. When the recommendation call is made, the first image renders, or through a Collect Tracking Code or event triggers.

Is the Revenue Shown for Web Recommendations by Page Influenced or a Direct Conversion?

Data for revenue broken down by page includes direct conversion. Influenced data can't be attributed to a single web recommendations page. The summary tab displays influenced web revenue at the site level.

How Do You Calculate the Site Lift Percentages on the Summary Tab in Einstein Recommendations?

Site lift is the percentage increase from the non-influenced number to the total number. Site lift for conversion rate and revenue per session are shown on the Summary tab. This visualization helps represent the lift that Einstein Recommendations provides to the overall site performance and is best analyzed trending over time.

How Do You Calculate the Comparison Percentages Found on the Summary Tab?

Comparison is the percent increase from the non-influenced number to the influenced number. The summary tab displays comparison calculations for conversion rate and revenue per session.

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Get the answers to frequently asked questions about Einstein Recommendations.

Can I Execute an Abandoned Cart or Abandoned Browse Email by Querying Einstein Recommendations Data Extensions?
Use Behavioral Triggers to create a list used in a send or journey.

If We Have Not Activated an Entry Event, Why Am I Receiving a Triggered Send to My Email Address?
Einstein Recommendations sends an email at the address you provided for triggered send testing and the data filter is operating as expected. We remove the data filter so that the emails send to all customers.

Can You Add Multiple Attributes from the Same Field, Such as When a Category Is Both Sandals or Leather Then Apply the Action?
Yes, you can add multiple attributes from a field.

Can You Apply a Rule Based on an Individual Profile, for Instance, When a Customer's Purchase History Contains a Product with a Category of Couch, Exclude Products with a Category of Sofa?
Yes, you can configure a rule to apply based on customer attributes.

Can You Specify Certain Scenarios a Rule Must Be Applied To?
No, rules are applied at a page level or channel level.

Can Different Rules Be Applied to Each Zone on a Page with Multiple Zones?
No, rules are applied at the page or channel level.

Does Apple Safari Intelligent Tracking Prevention Impact Einstein Recommendations?
Yes. Apple's Intelligent Tracking Prevention is a WebKit feature that reduces cross-site tracking by limiting cookies and other website data. This feature works for Safari web browser users. Due to the limited nature in which the Einstein Recommendation platform uses cookies, Einstein Recommendations work as designed for Safari users. Some users have reported that they must disable Safari's cross-site tracking feature to see the recommendations. If the recommendations aren't appearing on your main page, try enabling Safari's **Prevent cross-site tracking** setting. The cross-tracking option is enabled by default.

Why Does the System Add WF to a Scenario Name in an Einstein Recommendations Report?
The letters WF in the scenario name indicates the first scenario used to produce recommendations on a page where waterfall predictions are enabled.

Will My Recommendation Show Items That Were Already Purchased?
No, purchased items are excluded in your recommendations.

Can I Execute an Abandoned Cart or Abandoned Browse Email by Querying Einstein Recommendations Data Extensions?

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SEE ALSO:

Behavioral Triggers

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Einstein Email and Web Recommendations Model Card

The model in this card analyzes and provides personalized product and content recommendations.

    Model Details

    The Einstein Email and Web Recommendations model in Marketing Cloud Engagement personalizes recommendations with training algorithms, parameters, fairness constraints, features, and other applied approaches.

    Intended Use

    The Marketing Cloud Engagement Einstein Email and Web Recommendations model is intended for these use cases.

Relevant Factors

These factors are associated with the Einstein Email and Web Recommendations model in Marketing Cloud Engagement.

Metrics

Einstein evaluates and monitors model performance metrics to ensure and improve the quality of the model. These performance measures are associated with the Marketing Cloud Engagement Einstein Email and Web Recommendations model.

Training Data

You have a customized version of the model that's trained on your data alone. Data from one Salesforce customer doesn't affect the behavior for another Salesforce customer. While model training happens for each customer on their data, the initial development of the model is validated with a representative set of pilot customers' data.

Ethical Considerations

Review the ethical factors associated with the Marketing Cloud Engagement Einstein Email and Web Recommendations model. To avoid bias and other ethical risks, the Einstein Email and Web Recommendations model doesn't include demographic data.

Model Details

The Einstein Email and Web Recommendations model in Marketing Cloud Engagement personalizes recommendations with training algorithms, parameters, fairness constraints, features, and other applied approaches.

Person or Organization

Einstein in Salesforce Marketing Cloud Engagement

Model Date and Version

- December 2021
- Minor changes can occur throughout the release
- Major changes can occur and are communicated via release notes

Model Type

Clustering

General Information

The Einstein model powering Einstein Email and Web Recommendations uses customer data provided by Collect Tracking Code on page 50 API and the Einstein Recommendations Catalog on page 327.

Questions or Comments

Send questions or comments about the model to mce-support@salesforce.com.

Intended Use

The Marketing Cloud Engagement Einstein Email and Web Recommendations model is intended for these use cases.

EDITIONS

Available in: **Enterprise Enterprise +**, and **Corporate** Edition, and with Email Recommendations only in **Professional** Edition.

Primary Intended Uses

Einstein Recommendations provides personalized product and content recommendations to help drive revenue on email, web, and other marketing channels including these options.

- People Who Bought This Also Bought
- People Who Bought This Also Viewed
- People Who Viewed This Also Bought
- People Who Viewed This Also Viewed
- User Affinity
- Tag Scenarios

Out-of-Scope Use Cases

Anything other than the primary use case is out of scope and not recommended.

Relevant Factors

These factors are associated with the Einstein Email and Web Recommendations model in Marketing Cloud Engagement.

Model Input

Einstein Recommendations analyzes up to 180 days of historical behavioral data from Collect.js for each business unit. The engagement history includes these factors.

- Pageviews
- Category Views
- Carts
- Conversions
- Wishlists
- Metadata from the product or content catalog is used to build user affinity and provide attribute context. The affinity profile is created from user-tagged metadata from the catalog and is based on behavioral information.
- Output is based on localized behavioral data, catalog content, and user attributes by business unit.
- Business-specific rules added using Rule Manager on page 353 impact the model

The engagement history that Einstein Metrics Guard analyzes excludes these factors.

- Data purchased or collected from third parties
- Data from other business units
- Demographic Data, which is typically stored in SFMC as data extensions or subscriber or contact attributes

Model Output

- The model output is a list of products or content via email or web recommendation call
- Web recommendation output is a JSON block
- Email Recommendation is a link & image pair

Environment

The model is trained and deployed in the Salesforce Marketing Cloud Engagement environment.

Metrics

Einstein evaluates and monitors model performance metrics to ensure and improve the quality of the model. These performance measures are associated with the Marketing Cloud Engagement Einstein Email and Web Recommendations model.

Model Performance Measures

Model performance metrics include data like model mean absolute error score.

Training Data

You have a customized version of the model that's trained on your data alone. Data from one Salesforce customer doesn't affect the behavior for another Salesforce customer. While model training happens for each customer on their data, the initial development of the model is validated with a representative set of pilot customers' data.

Ethical Considerations

Review the ethical factors associated with the Marketing Cloud Engagement Einstein Email and Web Recommendations model. To avoid bias and other ethical risks, the Einstein Email and Web Recommendations model doesn't include demographic data.

Consider any assumptions made when deciding on actions based on the model-generated scores that could lead to a potentially adverse outcome.

👁 **Example:** For example, the model predicts low engagement so you choose not to send a marketing communication to a set of customers. If the prediction was erroneous, there could be a negative impact to excluding some of those customers from access to benefits or opportunities.

Einstein Web Recommendations

Einstein Web Recommendations use Einstein's capabilities to observe behavior, build preference profiles, and deliver the next-best personalized content to each website visitor. Use scenarios in the application to refine recommendations to match your specific business rules. Predictive content is surfaced in placeholders for recommendations on your website.

Web Recommendations are delivered in two ways, via a JSON response or HTML/JS. The JSON response is the best practice delivery method unless the web team can't work with JSON. The JSON method is the most flexible and allows a web team to style and use the recommendation data in any way. Because of the nature of the web recommendation and the JSON response, you're responsible for parsing and styling the recommendation within the user's web environment.

Here's an example of the response for a web recommendation.

```
[
    {
    "name": "product_rec",
    "title": "People who bought MEN'S BASE CAMP SLIP-ON III also bought",
    "priority": 1,
    "items": [
        {
            "image_link": "https://s3-us-west-2.amazonaws.com/nto-products/products370/1816100.jpg",
            "link": "https://stack7.collect.igodigital.com/redirect/v3QkFoSklnRytleUp1SWpvaVFtOT",
            "sale_price": 120,
            "regular_price": 150
        },
        {
            "image_link": "https://s3-us-west-2.amazonaws.com/nto-products/products370/1803100.jpg",
            "link": "https://stack7.collect.igodigital.com/redirect/v3QkFoSklnRytleUp1SWpvaVFtOTFaM",
            "sale_price": 88,
            "regular_price": 110
        },
        {
            "image_link": "https://s3-us-west-2.amazonaws.com/nto-products/products370/1848100.jpg",
            "link": "https://stack7.collect.igodigital.com/redirect/v3QkFoSklnRytleUp1SWpvaVFtOTFaM",
            "sale_price": 44,
            "regular_price": 55
        },
        {
            "image_link": "https://s3-us-west-2.amazonaws.com/nto-products/products370/1115100.jpg",
            "link": "https://stack7.collect.igodigital.com/redirect/v3QkFoSklnRzlleUp1SWpvaVFtOTFaMmg"
            ,
            "sale_price": 239.2,
            "regular_price": 299
        }]
    }
]
```

You can pull any catalog field into the web recommendation call, so it's important to understand which data generates the recommendation during catalog setup.

A unique web recommendation call is created for each type of page. Include the Home, Product, Category, Cart, and Conversion pages as a best practice, but you can set up as many pages as you want in the UI. Einstein Recommendations uses page templates, so a Product Page is a template used to build personalized recommendations for a product page.

Each type of page template can have different scenarios and a different context. For example, your product page can include recommendations based on the product a visitor is viewing based on that added context. However, your homepage recommendations are based on the overall user affinity because we don't have more context.

If you have a service engagement, the State of Work sets the number of pages services configures. However, you can add as many as you need.

Einstein Web Recommendation Dashboard

The web recommendation dashboard in Einstein Recommendations displays a list of available recommendations. From here, you can edit or delete a recommendation or create a new one.
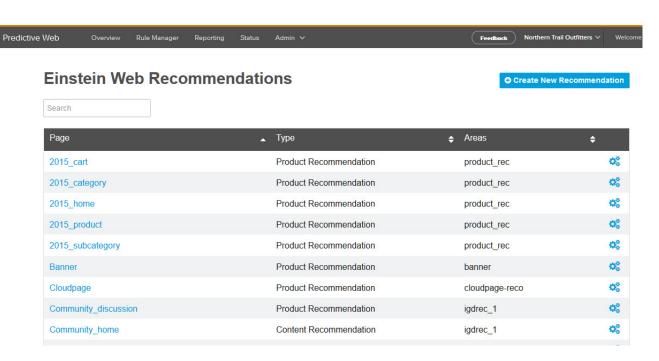
Create an Einstein Web Recommendation

Use Einstein Recommendations to create product or content recommendations to display on your website. The Einstein Recommendation Engine requires at least three active items in your product catalog.

Einstein Web Recommendation Dashboard

The web recommendation dashboard in Einstein Recommendations displays a list of available recommendations. From here, you can edit or delete a recommendation or create a new one.

The dashboard is the first screen you see when you open Einstein Web Recommendations. Click the **Overview** tab to return to the dashboard.

Column Header	Description
Page	Name of the page which is used for reporting. The name cannot be changed once it is created. We recommend that the page name matches the page template on your site for consistency.
Type	Lists the type of recommendations to be made: Product, Content, or Banner. More than one type can be displayed for sites with more than one active catalog.
Areas	Name for the location on the page where recommendations are displayed. More than one area can be displayed here since a page can have more than one recommendation zone.

Tip: Use the column headers or arrowheads within the column to sort.

Create an Einstein Web Recommendation

Use Einstein Recommendations to create product or content recommendations to display on your website. The Einstein Recommendation Engine requires at least three active items in your product catalog.

When your customer profile privacy field is set to one of these options, the system generates generic recommendations from the scenarios that you configured.

- Do Not Track
- Do Not Profile
- Do Not Process

For example, if you configure View as the top scenario, a customer who views a product detail page sees recommendations for products that other customers also viewed.

> 💡 **Tip:** System Scenarios are enabled by default and provide filler content when configured scenarios don't produce the expected number of recommendations. To disable this feature, select **Disable System Scenarios** box.

1. Add a Web Recommendation to a Page

   Configure where Einstein Web Recommendations appear on your site and the type of recommendations to provide.

2. Create the Einstein Web Recommendations Content Area

   Select and configure the content to include in your web recommendations.

3. Configure the Web Recommendations Display Format

   Format how your recommendations appear on your website.

4. Configure an Einstein Web Recommendations Scenario

   Determine which recommendation scenarios to use in Einstein Web Recommendations.

5. Preview and Insert Einstein Web Recommendations

   Include the Einstein Web Recommendations code in the selected page's code. Both the JavaScript code for the recommendation call and the HTML recommendation zone placeholder are provided.

Add a Web Recommendation to a Page

Configure where Einstein Web Recommendations appear on your site and the type of recommendations to provide.

1. Select **Einstein Web Recommendations**.

2. Create a page, or select an existing one from the list.

   The page name can't have the same name as an existing page. Standard page names are Home, Cart, Product, Search, and Category.

3. Choose the recommendation type.

4. Click **Create**.

The Build tab opens with a recommendation area with the default name "igdrec_1."

Create the Einstein Web Recommendations Content Area

Select and configure the content to include in your web recommendations.

1. Click **igdrec_1** and enter a new name.

2. Choose **Number** or **Range** from the dropdown.

3. Enter the number of recommendations to return.

4. To preview your recommendation, click **Preview**.

   > 💡 **Tip:** If there aren't enough items available for recommendations, nothing is returned unless you select **Waterfall Predictions**.

5. To add more recommendation areas to this page, click **Add Another Area** and repeat steps 1–4.

6. Click **Save**.

The Build tab closes and returns you to the web personalization dashboard. The new page is listed.

Configure the Web Recommendations Display Format

Format how your recommendations appear on your website.

1. Select the page to be modified and click the **Output** tab.

    > **Note:** The canvas displays previously chosen output fields for the page. If nothing is chosen, the system generates recommended output fields based on your catalog fields.

2. Choose the output preview format.

3. Select a field and click **Add**. Add as many fields as you need.

4. To change the display fields order, drag the fields into order from top to bottom on the canvas.

    > **Note:** To delete a field, click .

    The Output Preview displays the output code.

5. To see how the code renders, click **Preview**.

    To return to the canvas, click **Close**.

6. Click **Save**.

Configure an Einstein Web Recommendations Scenario

Determine which recommendation scenarios to use in Einstein Web Recommendations.

1. Click the recommendation to configure.

2. On the Scenarios tab, select a scenario and click **Add**.

    For details about what each scenario does, see Einstein Recommendation Scenarios.

3. Click **all areas** and select a recommendation area.

4. Add more scenarios if you want.

    Personalization Builder returns predictions from the top-ranked scenario. To remove a scenario from the canvas, click .

5. To reorder the priority of scenarios, drag them into the order from top to bottom.

6. To use waterfall predictions, select **Enable Waterfall Prediction**.

    > **Tip:** Learn more about Waterfall Predictions.

7. To suppress system-generated scenarios, select **Disable System Scenarios**.

8. Save your configuration.

    To restore the default scenario configuration, click **Restore to Default Best Practices** and click **Save**.

Preview and Insert Einstein Web Recommendations

Include the Einstein Web Recommendations code in the selected page's code. Both the JavaScript code for the recommendation call and the HTML recommendation zone placeholder are provided.

1. Click the **Get Code** tab.

2. Copy the code.

    For more information and to learn how to customize the code, review Get Code Details and Customize the Calls.

3. Place the code in the `<head>` or `<body>` section of your site.

Learn how to add the Einstein Web Recommendations code you create in Einstein Recommendations to your website.

Get Code Procedures

Learn how to add the Einstein Web Recommendations code you create in Einstein Recommendations to your website.

1. On the Web Recommendation dashboard, select a page.

2. Click the **Get Code** tab.

3. Copy each piece of code and add it to the `<head>` or `<body>` section of your site.

   For more information on embedding the code and customizing calls, see Get Code Details in Personalization Builder and Customize the Calls.

Recommendations are live immediately after you apply the code to your webpages. We recommend that you test recommendations to a test environment before you add them to a live site.

Get Code Details in Einstein Recommendations

Find the JavaScript and HTML code required to render Einstein Recommendations on your page. Copy the code and embed it in your page source for each piece of code.

Customize the Calls

Einstein Recommendations code accepts several different parameters. To initiate an API call, use HTTP or HTTPS to match the address prefix of the page on your site where the call is made.

Get Code Details in Einstein Recommendations

Find the JavaScript and HTML code required to render Einstein Recommendations on your page. Copy the code and embed it in your page source for each piece of code.

Customize the provided basic recommendation calls to match your site. The description key in each box shows additional information that you can pass in the JavaScript source URL.

These client parameters aren't run-time variables. The variables after "?" are supplied in the call at run time.

There are required fields for some pages.

Page	Required Field
Product Detail	ProductCode
Category	CategoryName
Cart	List of cart ProductCodes
Search	Search Term

👁 Example: **Home Page**

Place the div where it's displayed in the recommendation. Place this value exactly where it appears on the page.

`<div id="igdrec_1"></div>`.

Next, place a script tag with this code.

```
<script
src="http://{client_name}.recs.igodigital.com/a/v2/{client}/home/recommend.js"></script>
```

👁 Example: **Product Detail Page**

Place the div where it's displayed in the recommendation. Place this value exactly where it appears on the page.

```
<div id="igdrec_1"></div>.
```

Next, place a script tag with this code.

```
<script
 src="http://{client_name}.recs.igodigital.com/a/v2/{client}/product/recommend.js?item=ProductCode"></script>..
```

ProductCode is the item viewed and must match the same value passed in the Collect Tracking Code `item` variable.

👁 Example: **Category and Sub-Category Page**

Place the div where the recommendation displays. Place this value exactly where it appears on the page.

```
<div id="igdrec_1"></div>.
```

Next, place a script tag with this code.

```
<script
src="http://{client_name}.recs.igodigital.com/a/v2/{client}/category/recommend.js?
category=Category_name"></script>.
```

Replace Category with the actual category page name where the recommendation call is being made. This code must exactly match the categories stored in the product catalog category.

If the category name includes any spaces or special characters, the URL value must be encoded. For example, if the category is *Category & Name*, then the URL parameter is `category=Category%20%26%20Name`.

👁 Example: **Shopping Cart Review Page**

Place the div where the recommendation displays. Place this value exactly where it appears on the page.

```
<div id="igdrec_1"></div>.
```

Place a script tag with this code after the div.

```
<script
src="https://{client_name}.recs.igodigital.com/a/{client}/cart/recommend.js?cart=ProductCode".</script>.
```

Match the value in ProductCode to the value sent in the Collect Tracking Code `cart` variable as a pipe-delimited list.

Customize the Calls

Einstein Recommendations code accepts several different parameters. To initiate an API call, use HTTP or HTTPS to match the address prefix of the page on your site where the call is made.

Parameter	Details
item	This unique identifier for your product or content must match the unique key in the catalog and the value sent in the trackPageView collect item variable. This parameter is required for a product- or content-based recommendation on any page. The unique identifier

Parameter	Details
	is the product code: item=XXXXXX, where XXXXXX is the ProductCode.
search	This pipe-delimited list contains search terms from your search page and matches the value sent in the trackPageView collect search variable.
category	This pipe-delimited list of categories matches both the values sent in the catalog feed and the value sent in the trackPageView collect category variable.
cart	This pipe-delimited list of products in the cart matches the trackCart collect item variable.
wishlist	This pipe-delimited list of products in the customer's wishlist must match the trackWishlist collect items variable array.
email	Use this parameter for faux-server-side, CloudPages, MobilePush, FaceBook tab, or some mobile apps. Pass the email address of the profile recommendation you want to access. The email value is the same value passed to Collect. If this value is a SubscriberKey, pass the SubscriberKey value.
user_id	This parameter is used in testing or an advanced setup. It returns the cookie value from the profile containing the recommendations you want to access.
item_count	Use this parameter to set the number of returned products or override the returned products setting.
locale	This five-character value indicates which localized content to display.
exclusion	Use this parameter to pass a pipe-delimited list of key-value pairs to exclude: field_name_1|field_value|field_name_2|field_value.

Table 16: Calls No Longer Supported

Parameter	Details
cart_skus	This pipe-delimited list of products in the cart matches the trackCart collect unique_id variable.
with_root	Deprecated in V2: When this parameter is set on a product or content detail page, the first recommendation in each module is the product or content the subscriber is accessing. The most common use for this value is a recommendation, such as "People who bought <Root Product> also bought <with_root recommendation>:"
do_not_record nolog	This parameter instructs the system not to record the recommendation.

Parameter	Details
inclusion	Use this parameter to pass a list of product SKUs for inclusion.

A Marketer's Guide to the Trusted Use of Einstein

Salesforce believes that the benefits of AI can, and should, be accessible to everyone. But increasingly, AI is facing a crisis of trust. Therefore, trust is at the top of Salesforce's priority list for customers.

With the Einstein Generative AI features in Marketing Cloud Engagement, Salesforce is continuing to prioritize trust by ensuring the responsible use of our AI products. The Office of Ethical & Humane Use of Technology has released the AI Acceptable Use Policy to provide greater clarity for our customers, create and uphold industry standards, and ensure safe and trusted experiences for all using our technologies.

Einstein in Marketing Cloud Engagement helps make your marketing efforts more efficient while creating optimized and engaging one-on-one customer experiences. The AI-based services are powerful tools that help drive segmentation, content optimization and creation, automate orchestration and provide insights to improve performance.

Our Trusted and Transparent Approach

At Salesforce, we're committed to developing ethical and inclusive technology. Given the tremendous opportunity and challenges emerging in the generative AI space, Salesforce is building on top of our Trusted AI Principles with a new set of guidelines focused on the responsible development and implementation of generative AI. The five guidelines Salesforce uses to guide the development of trusted generative AI are Accuracy, Safety, Honesty, Empowerment, and Sustainability. As part of our commitment to ethical technology use, our Research & Insights team collaborated with our Marketing Cloud Engagement product teams and the Office of Ethical and Humane Use to publish our Responsible Marketing Principles. The principles document outlines some tools that we developed so that our employees, customers, and partners can use AI more responsibly, accurately, and ethically.

Use Einstein Generative AI with Confidence

At Salesforce, trust is our #1 value. To keep your data secure, Salesforce has agreements in place with large language model (LLM) providers, such as OpenAI. These agreements allow organizations to use generative AI capabilities without their private data being retained by the LLM providers.

In Marketing Cloud Engagement, use Einstein generative AI to safely create subject lines and body copy in both Einstein Copy Insights and Content Builder.

Use Model Cards to Understand How Einstein Models Work

Consumers and marketers want to know how a model behaves and how it arrives at its prediction or recommendation in order to trust the model. Einstein model cards provide critical information about model inputs and outputs, the conditions when models work best, and the ethical considerations in their use. These cards answer questions about using the models as intended, and whether there are any biases to consider. Providing this transparency helps developers, customers, policymakers, and others better understand the impact of our AI on individuals, communities, and society. Check out these model cards for details.

- Einstein Send Time Optimization for Email on page 264 determines the optimal time to send an email to a subscriber to maximize the probability that the subscriber opens the email.

- Einstein Send Time Optimization for Mobile on page 268 determines the optimal time to send a mobile message to maximize the probability that a subscriber interacts with the message.

- Einstein Engagement Scores for Mobile on page 246 evaluates each contact's engagement record to assign scores for the contact's likelihood to interact with mobile messaging.

- Einstein Messaging Insights on page 256 monitors message engagement rates and notifies marketers when anomalies in their marketing performance occur.

- Einstein Engagement Frequency on page 275 analyzes each contact's engagement record to determine the optimal frequency at which to send email messages to that contact.
- Einstein Subject Line Tester on page 283 evaluates contact engagement based on email subject lines.

Check Data Quality Scores to Ensure Your Data is AI-Ready

Use data quality scores as indicators to help you determine how ready your data is for Einstein to make accurate predictions. With any AI model, the quality of the output depends on the quality, representativeness, and robustness of the input. Data quality scores show you when the data is in good or bad shape, why it's in that shape, and general tips for improvement.

- Gauge Your Einstein Engagement Scoring Data Quality
- Gauge Your Einstein Engagement Frequency Data Quality
- Gauge Your Einstein Send Time Optimization Data Quality

Review Bias Flags to Prevent Potential Disparate Impact

Bias flags indicate when selected inputs can introduce bias into the model. For example, Einstein Content Selection uses bias flags to indicate potentially sensitive attributes in profile data. And in the Einstein Subject Line Tester, bias flags show when words or phrases in a sample can be considered sensitive. Bias is contextual and based on industry and use cases. Einstein highlights potential biases so that you can evaluate how to proceed based on the context.

- Identify Attributes That Can Introduce Bias
- Test a Subject Line Before You Send

Call to Action

To optimize your marketing efforts, use these prompts toward deeper thought and discussion. The prompts aren't exhaustive and don't apply to all organizations, teams, products, or features.

- Are your training and evaluation datasets representative of your customer population? How do you know?
- Have you assessed your datasets and models for bias?
- If you have launch criteria, does your model meet that criteria for various population subgroups?
- Does your model have similar performance for the various population subgroups or does it perform worse for one group versus another?
- Are you using AI to infer sensitive information about your users such as age, gender, health status, sexual orientation, political affiliation, financial status, or criminal convictions?
- Are you collecting and using sensitive data only when necessary and when it can benefit the customer?
- Are you using sensitive data proxies such as a first name or salutation that can relate to gender, or a ZIP code that can relate to race, unnecessarily?
- Are you giving customers control over the data that you collect and do you respect their preferences?
- Are you demonstrating the benefits that customers receive in exchange for data usage?

Summary

The ethical use of AI is an increasingly complex issue to address to ensure that it's safe and inclusive for all. Model cards, data quality scores, and bias flags are a few of the ways that we infuse ethics into our AI practices at Salesforce.

Resources

- Salesforce Responsible AI in Marketing
- Salesforce Responsible Creation of AI Trailhead
- Salesforce AI Ethics Blog
- Salesforce Artificial Intelligence Acceptable Use Policy

Join Us

If you're interested in participating in Salesforce User Research, sign up for our research program and influence product design and direction. If you need more incentive, we almost always provide a thank you gift!

Contact Us

If you have questions about the ethical use of Einstein, contact your Salesforce account executive, or email buildwithintention@salesforce.com. A team monitors this inbox and typically responds within 72 hours.

Salesforce Audience Studio and Data Studio

View Salesforce Audience Studio and Data Studio documentation.

Audience Studio
Salesforce allows you to capture, unify, and activate your data to strengthen consumer relationships across every touchpoint with a powerful data management platform.

Data Studio
Data Studio, or data sharing, is Salesforce's #1 solution for audience discovery, data acquisition, and data provisioning — featuring the world's largest premium data ecosystem.

Audience Studio

Salesforce allows you to capture, unify, and activate your data to strengthen consumer relationships across every touchpoint with a powerful data management platform.

Salesforce Audience Studio lets you:

- Create complete data profiles - Combine all your data from any source to deliver more relevant marketing experience.

- Discover new insights - Respond to new data signals and sources to identify new audiences.

- Access premium data sources - Use the most trusted second- and third-party data sources to build and scale your audiences.

Data Studio

Data Studio, or data sharing, is Salesforce's #1 solution for audience discovery, data acquisition, and data provisioning — featuring the world's largest premium data ecosystem.

Data Studio lets you:

- Create richer audiences for Marketers - Discover high-quality audiences at scale.

- Increase revenue for data owners - Monetize your data with full transparency and control.

- Take control of your data - Protect your data and provision it at scale to trusted partners with data governance.

Visit Data Studio FAQ for more information.

> 📝 **Note:** Data Studio help articles are only available with a Audience Studio login.

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