

salesforce

# Einstein Dashboard FAQ

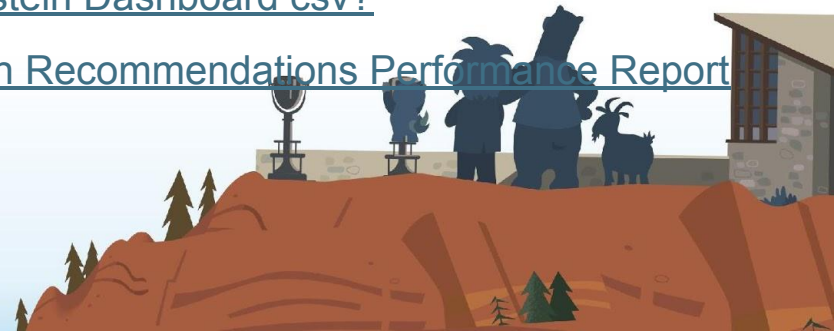
As of May 8th, 2020



# FAQ



1. [What new functionality is available in the Einstein Dashboard that wasn't available in the report sent via email?](#)
2. [When will I stop receiving the emailed Einstein Recommendations Performance Report?](#)
3. [How do I get access to the Einstein Dashboard?](#)
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What new functionality is available in the Einstein Dashboard that wasn't available in the report sent via email?



# Noteworthy Improvements

## **Currency Conversion**

Previously (Emailed CSV): Didn't perform any currency conversions

Now: Reports & Dashboards uses a daily Currency feed to convert order data to site currency values, and then to reporting currencies.

## **Reporting Timezone**

Previously (Emailed CSV): In the CSV reports, it wasn't possible to modify the data reporting timezone. Data for all sites were processed in a timezone agnostic manner.

Now: In Reports & Dashboards, Einstein performance data will be updated to display in the reporting timezone set in the Settings page.

## **Processing Frequency**

Previously (Emailed CSV): Data was processed on a weekly basis, for the purpose of creating CSV reports.

Now: Recommendations related data is processed and attribution is determined on a daily basis as data is received from Einstein into the Commerce Intelligence infrastructure that run Reports & Dashboards

## **Processing Scope**

Previously (Emailed CSV): Data included Recommendations activity across PRD, STG and DEV instances.

Now: Only activity from PRD instances are included in Reports & Dashboards

# When will I stop receiving the emailed Einstein Recommendations Performance Report?



# Deprecating Emailed Reports on 3/31/2020



The external announcement may be viewed in the [20.4 Release Notes](#)

Why are we deprecating emailed reports?

1. Reports replaced with the new [Einstein Dashboard](#) tab in New Reports & Dashboards
2. Einstein Dashboard calculations align to New Reports and Dashboards calculations, so user may accurately compare Einstein attributed revenue to overall site revenue



# How Do I Get Access to the Einstein Dashboard?





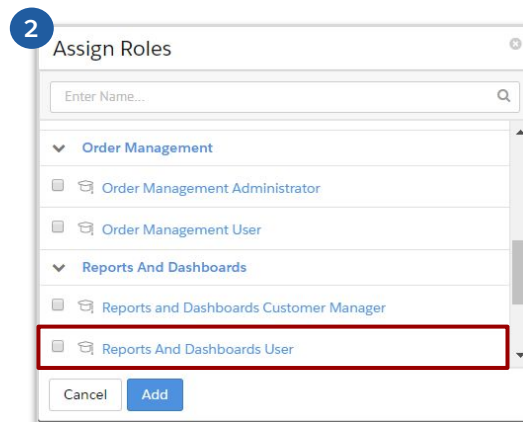
# Set Up Reports & Dashboards in Account Manager



If you already have access to the [New Reports and Dashboards](#), then you will see the Einstein tab by default!

If you don't have access to the New Reports and Dashboards, then your Account Manager may provide you with access through Commerce Cloud Account Manager by taking the following steps:

1. Login to [Account Manager](#)
2. Go to Roles and click the Add button. Select the "Reports and Dashboard User" roles under Reports and Dashboard section
3. Go back to *Roles > Reports and Dashboards*. Admins will see a "No roles scope defined" warning, select the filter button



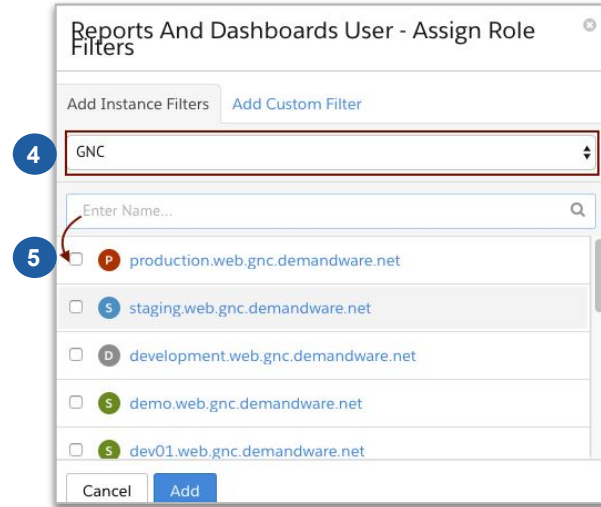


# Set Up Reports & Dashboards in Account Manager Cont'd...



4. The Add Instance Filters tab will appear.  
Select the Organization name
5. Select the Production instance to gather the business metrics for all production sites
6. Click Save to save the changes in the account

Reports & Dashboards can be accessed at:  
<https://ccac.analytics.demandware.com/dashboard>.



# How far back is the data available in the Einstein Dashboard?

*January 16th, 2020*



My realm is live with Einstein Recommendations. Why don't I see any reporting results in the Einstein Dashboard?

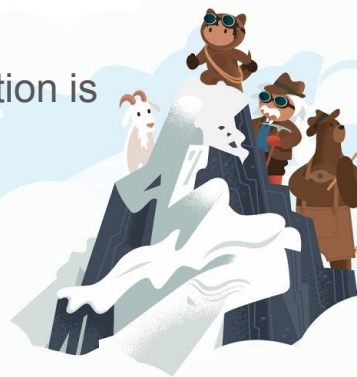


# Reporting Event Dependencies



List of reporting events that the Einstein Recommendations Report is dependent on:

- **viewReco** - View product recommended by Einstein. The corresponding tag in the .isml templates is below. Documentation [link](#); troubleshooting guidance [here](#)
  - `<isobject object="{product}" view="recommendation">`
- **clickReco** - Click on a product recommended by Einstein (Chrome extension available to validate). This event is implemented by dropping a cookie on the referring page, sending a pixel on the landing page and deleting the cookie immediately
- **addToCart** - Adding a product to the cart.
- **finishCheckout** - Sent by default server-side. No client-side instrumentation is necessary



What are the definitions of the fields in the new Einstein Dashboard csv?



# Einstein Dashboard (New) CSV Download

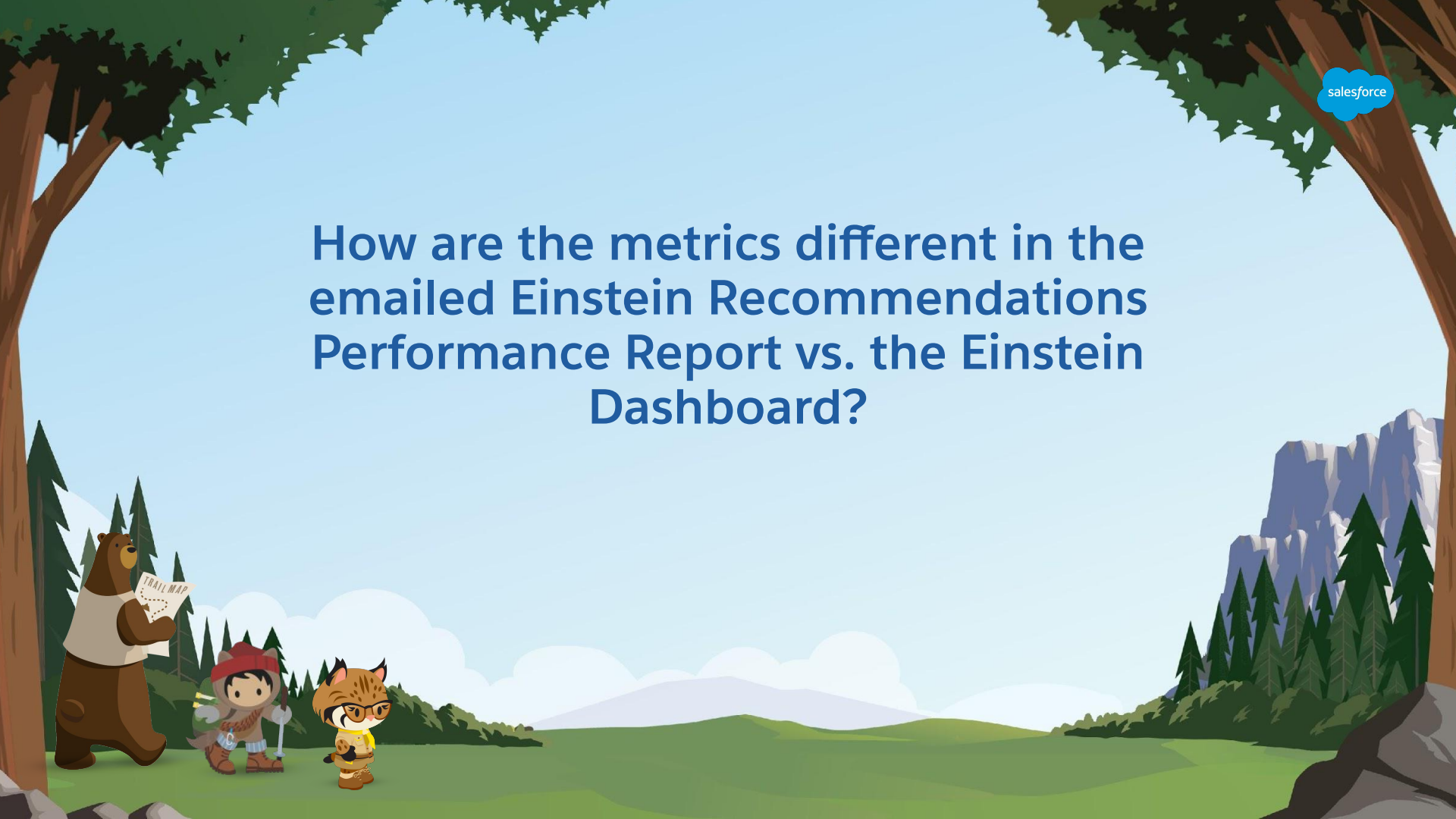


recommender_name	site	recommender_views_count	product_views_count	clicks_count	add_to_cart_count	product_purchased_count	order_count	ste_attributed_revenue	std_attributed_revenue	usd_attributed_revenue	ctr	atc_rate	conversion_rate
Product-Details-Page_You-Might-Also-Like	Sites-smoke-Site	211,338	5,259,366	6,661	1,179	359	299	13,795.71	13,795.71	13,795.71	3.15%	17.70%	30.45%
<p>Recommender name defined by user in <a href="#">Configurator</a></p> <p>A Recommender may be associated with one or more locations</p>	Site selected in the Dashboard before download	<p>The aggregate count of the number of times a page with the associated recommender was shown to visitors in a given time period</p> <p>It doesn't matter if the slot was rendered "below the fold"</p> <p><i>Views and preceding metrics are only from PRD</i></p>	<p>The number of products that were recommended. Example: If 5 products are shown by a recommendation, the recommender_views_count is 1 and the product_views_count is 5.</p>	<p>Number of times the user clicked on any product displayed in the associated recommender</p>	<p>Number of DISTINCT products added to cart where that product was the first one to be clicked on within the associated recommender in the same session or up to 7 consecutive days following the click event</p> <p>Only products that were clicked on, and subsequently added to cart within consecutive 7 days is attributed to that Recommender</p>	<p>Number of distinct product purchased (not orders placed) when the product was attributed to having been first clicked on from within a recommender in the same session or up to 7 consecutive days following the click event</p>	<p>Number of distinct orders placed containing one or more products purchased are the result of recommendation. See definition of product_purchased_count for qualifying products. An order with multiple qualifying attributed products will only be counted once towards order_count total.</p>	<p>For the associated products converted to the sites configured reporting currency in the given time period, the merchandise value for each product purchased, that has first-click attribution to a given recommender within a 7 day period</p>	<p>For the associated products converted to the realms configured reporting currency in the given time period, the merchandise value for each product purchased, that has first-click attribution to a given recommender within a 7 day period</p>	<p>For the associated products converted to USD in the given time period, the merchandise value for each product purchased, that has first-click attribution to a given recommender within a 7 day period</p>	Measured as Clicks/Views	Measured as Add-to-Cart/Clicks	Measured as Conversions /Add-to-Cart





# How are the metrics different in the emailed Einstein Recommendations Performance Report vs. the Einstein Dashboard?





# Einstein Dashboard (New) vs.



	Recommendation Name	Views	Clicks	CTR	Adds to Cart	ATC Rate	Products Purchased	Cart Conversion Rate	Attributed Revenue
	pdp-similar-items	7598	342	4.50%	68	19.88%	21	30.88%	3258.72
Ability to select dates Displayed in the <b>timezone set in the Settings page</b>	<p>Recommender name defined by user in <a href="#">Configurator</a></p> <p>A Recommender may be associated with one or more locations</p>	<p>The aggregate count of the number of times a page with the associated recommender was shown to visitors in a given time period</p> <p>It doesn't matter if the slot was rendered "below the fold"</p> <p><b>Views and preceding metrics are only from PRD</b></p>	<p>Number of times the user clicked on any product displayed in the associated recommender</p>	<p>Measured as Clicks/Views</p>	<p>Number of DISTINCT products added to cart where that product was the first one to be clicked on within the associated recommender in the same session or up to 7 consecutive days following the click event</p> <p>Only products that were clicked on, and subsequently added to cart within consecutive 7 days is attributed to that Recommender</p>	<p>Measured as Add-to-Cart/Clicks</p>	<p>Number of distinct product purchased (not orders placed) when the product was attributed to having been first clicked on from within a recommender in the same session or up to 7 consecutive days following the click event</p>	<p>Measured as Conversions/Add-to-Cart</p>	<p>For the <b>associated products converted</b> in the given time period, the merchandise value for each product purchased, that has first-click attribution to a given recommender within a 7 day period</p>

# Einstein Recommendations Performance Report (Old)

time_period	recommender	views	clicks	ctr	add_to_cart_cnt	atc_rate	product_conversions	cart_conv_rate	purchase_amt
2020-02-23 - 2020-02-29**	pdp-similar-items	7638	343	4.49%	69	20.12%	21	30.43%	3550.63
Weekly calendar date of reporting	Same as above	<p>Number of times that widget was shown to visitors in that time period</p> <p><b>Views and preceding metrics are from PRD, STG, and DEV instances</b></p>	<p>Number of clicks received by that widget in that time period</p>	Same as above	<p>Number of distinct products added to cart where the products were first-click-tagged* in this recommender in the 7 days following the click event</p> <p>* First-click-tagged: add-to-cart are tagged with the first click for a specific product-customer combo having 7-days before the event.</p>	Same as above	<p>Number of distinct products bought where the products were first-click-tagged** in this recommender in the 7 days following the add-to-cart</p>	<p>Cart-to-Buy Rate. Equal to conversions/add_to_carts</p>	<p>Example: Transaction = \$100; Transaction has four products A, B, C and D; A and B were recommended -in-that widget-and-clicked-on in time period; <b>prorated</b> purchase _amount = (\$100/4) * 2 = \$50</p> <p>Amount is local currency of each transaction on site with no conversion applied</p>

Thank you

