

Configure a Customer View

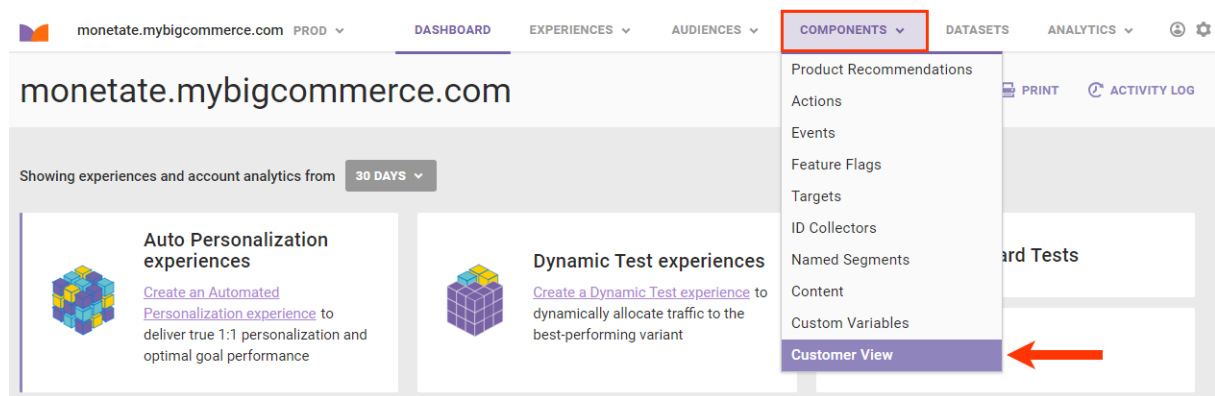
A Customer View is a fully customizable view of a customer across one or more domains that exist within a Monetate account.



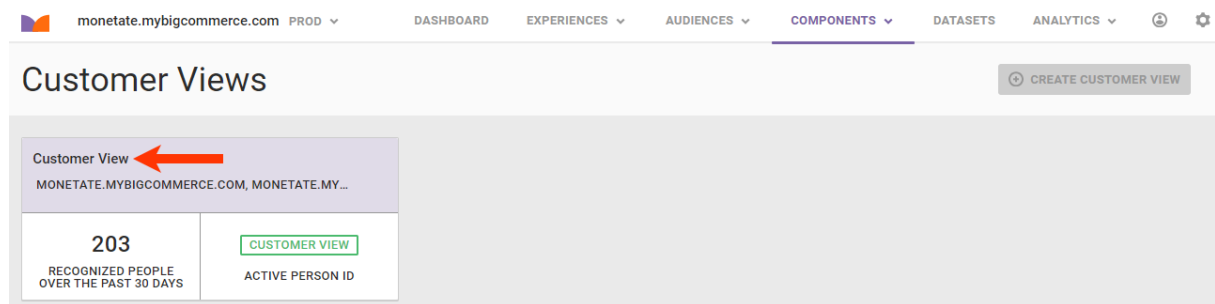
An account can only have one Customer View.

Follow these steps to access an account's Customer View.

1. Click **COMPONENTS** in the top navigation bar, and then select **Customer View**.

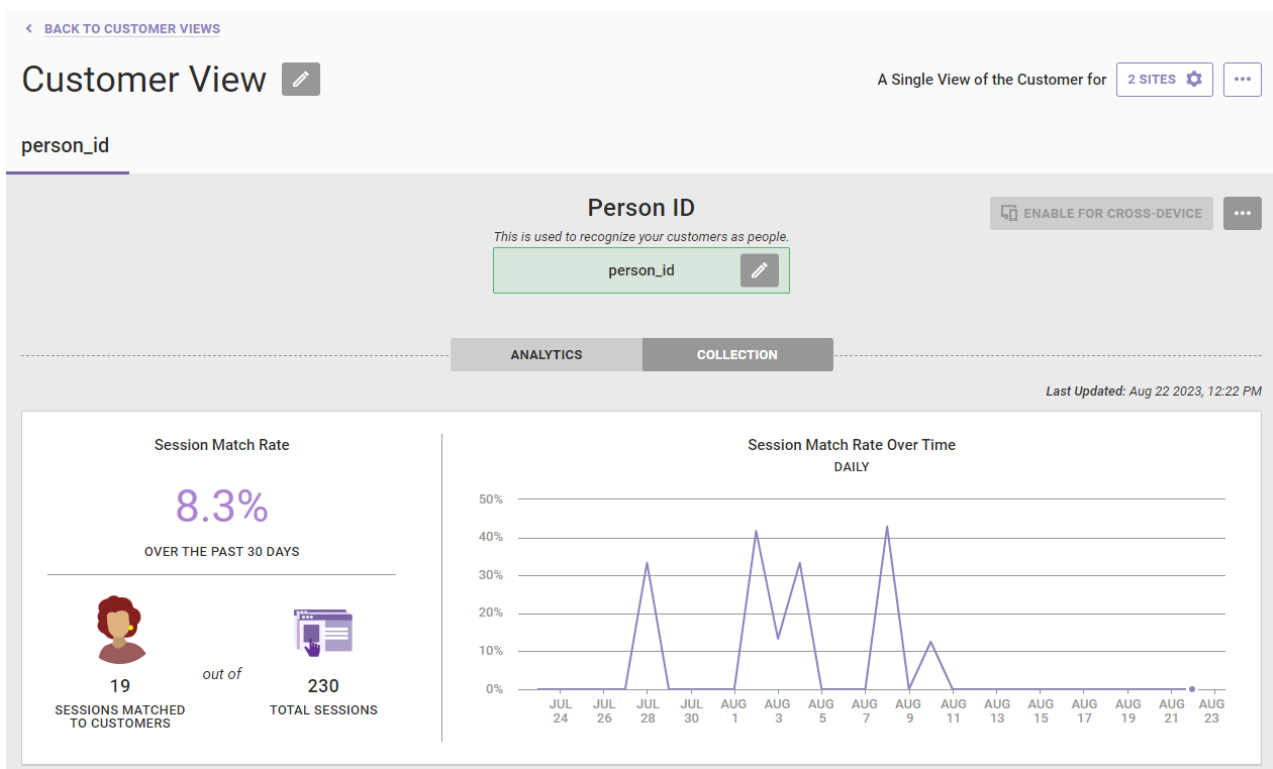


2. Click the name of the Customer View to see its details page.



Person ID

A Person ID is the unique identifier assigned to an individual and set up for the purpose of identifying people in cross-device targeting and testing.



It can be configured to recognize visitors to your site using two methods, and both methods rely on [ID Collectors](#). An ID Collector is a custom target that collects a Person ID from an HTML element, JavaScript variable, or cookie on a page of your site or from a URL query parameter from an email click-through to your site. You can use a previously created ID Collector (or on-site ID you created for Data Activation) or create a new one.

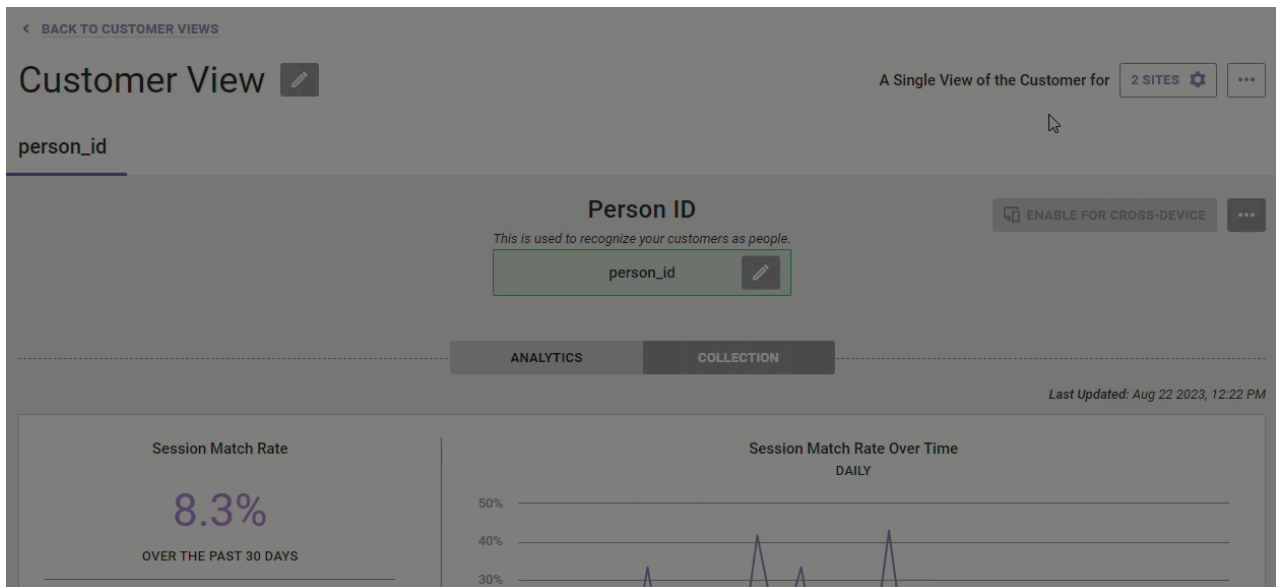
Sites

You can set up a Customer View to work on multiple domains connected to your account. Click **SITES** in the upper-right corner of the page to view the sites linked to the Customer View.

The Select Sites in Customer View modal that appears shows not only the sites linked to the Customer View but also sites eligible to be added to it.



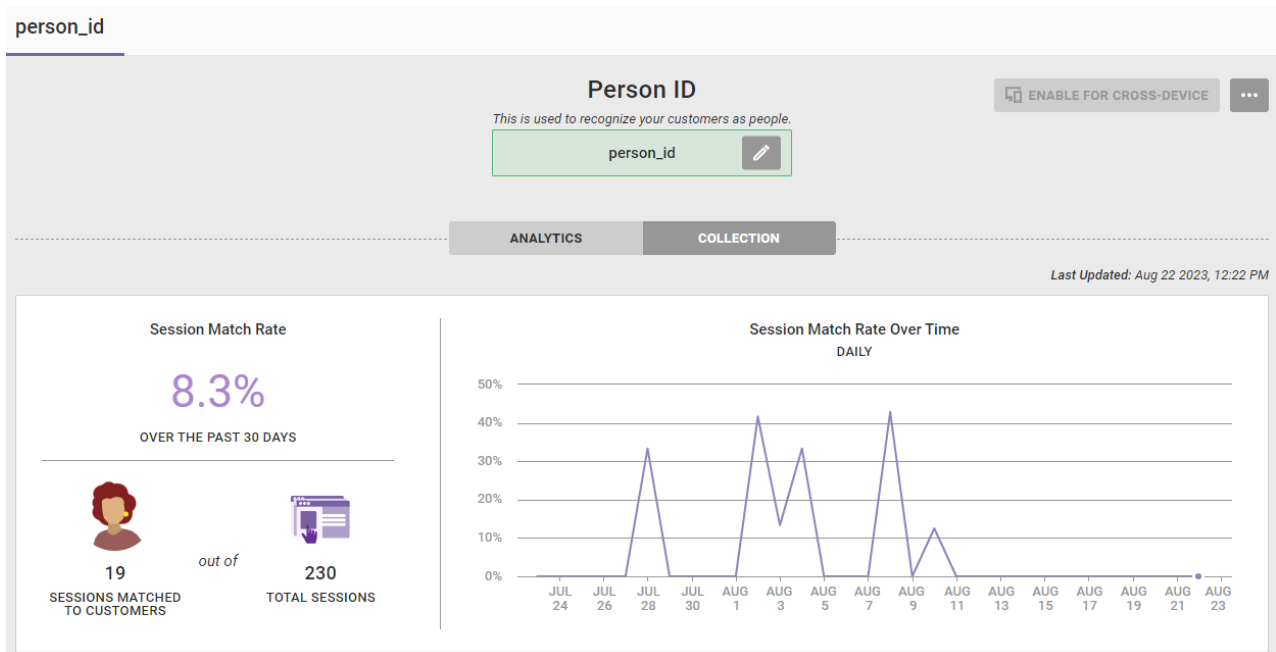
Although the Select Sites in Customer View modal shows the Customer View name in an enabled text field, do not change the name here.



If you remove a linked site from the Customer View, then cross-device testing and targeting stops working on that site. Group assignments for any active tests and any experience targeting based on customer behavior are also impacted.

Session Match Analytics

The ANALYTICS view allows you to gauge the performance of the Person ID based on the session match rate over the past 30 days. The information displayed populates in real time, with the date and time of the last update displayed in the upper-right corner of the view.



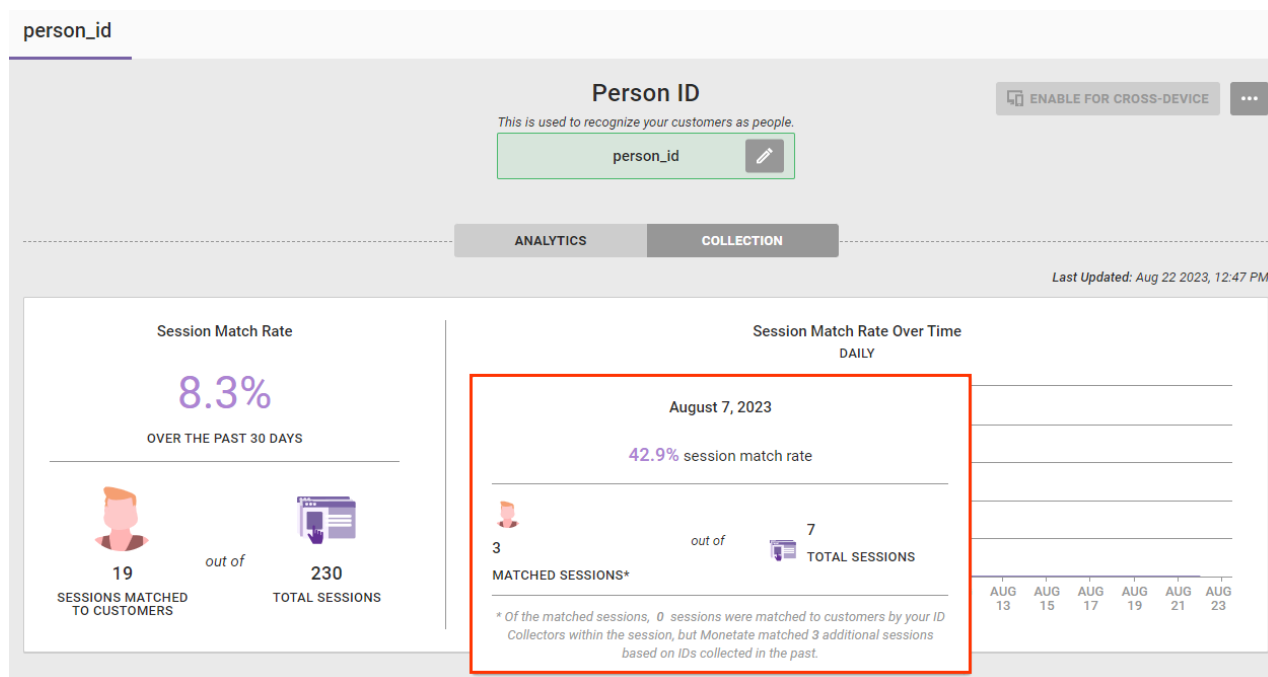
The Session Match Rate column on the left displays a high-level overview of the data points explained in this table.

Metric	Description
Session Match Rate	The percentage of Monetate sessions linked to an identified person over the past 30 days
Sessions Matched to Customers	The total number of sessions where a Monetate ID has been linked to the Person ID over the past 30 days
Total Sessions	The total number of Monetate sessions observed over the past 30 days across all domains of the Customer View

When your mouse pointer hovers over a specific point on the Session Match Rate Over Time graph, a modal appears that contains the match rate percentage, total matched sessions and total sessions for that specific point in time.



You don't need to enable cross-device for a Person ID to begin identifying people and populating the **ANALYTICS** view. See [Cross-Device Testing](#) for more information.



Additionally, this modal shows the number of sessions that were matched to customers within the session and the number of sessions that were matched to customers in a prior session.

Configuring Person ID Collection

You can configure two methods to recognize visitors to your site(s): collecting the Person ID on-site and collecting it after click-through. Each method relies on one or more ID Collectors to accomplish its respective task.

person_id

Person ID

This is used to recognize your customers as people.

person_id

ENABLE FOR CROSS-DEVICE

ANALYTICS COLLECTION

Configure Methods To Collect Your Person ID

Configure as many methods as possible to recognize the most visitors to your site(s).

METHOD A

Collect Onsite
1 OF 2 SITES CONFIGURED

monetate.mybigcommerce.com ✓

STORE VISITOR ID COLLECTOR
Type: Cookie
Value: STORE_VISITOR

ADD OR CREATE ID COLLECTOR

METHOD B

Collect After Clickthrough
1 OF 2 SITES CONFIGURED

monetate.mybigcommerce.com ✓

Email IDCollector ID COLLECTOR
Type: Query Parameter
Value: subscriberID

ADD OR CREATE ID COLLECTOR

monetate.mybigcommerce.uk !

ADD OR CREATE ID COLLECTOR

monetate.mybigcommerce.uk !

ADD OR CREATE ID COLLECTOR

You can use one or both of these methods as makes sense for your business, but you must use at least one of them.

Collect Onsite

You can collect a customer's Person ID after they perform an on-site recognition event such as logging in or checking out using these means:

- JavaScript variable
- Cookie
- HTML element content

For more information on how to find this type of collector, refer to [Find ID Collectors](#).

Collect After Click-Through

You can collect a customer's Person ID in a URL parameter after they click through to your site from an email or third-party site. More information about finding this type of collector is also available in [Find ID Collectors](#).

Deleting a Customer View



While you can delete a Customer View by selecting **Delete View** from the additional options menu (...), this action is not recommended.

Deleting a Customer View also deletes all Person IDs contained in it, stopping any collecting of customer information as configured by the methods in those Person IDs. Furthermore, deleting a Customer View is a permanent action.