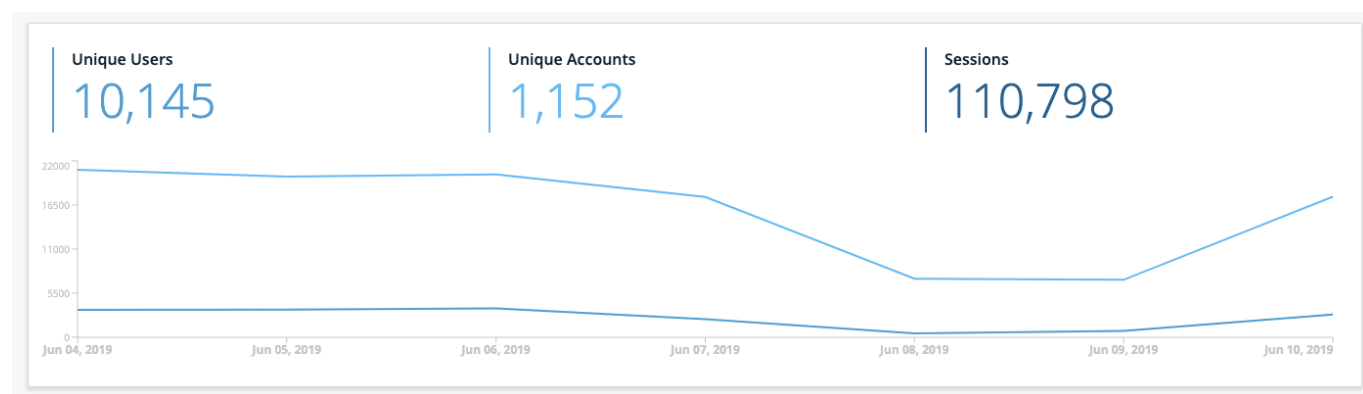


Account Based Analytics

Brief Overview

For SaaS companies targeting account-based sales, tracking user-level data alone is insufficient. They seek the ability to monitor user groups, specifically accounts, in terms of engagement and adoption.

By enabling the Accounts Based Analytics feature, Insights will augment end-user data with corresponding account information. This enhancement ensures that specific end users are categorized under their respective parent accounts.



Supported Methods

Email

- The user identifier is set in the Editor and the assigned value is a standard email

Safe Start

General

Single Page

Features

Unique User Settings

Set a unique user identifier to track each user's activity

User Identifier: Defined by

☒ Don't load WalkMe if user I

Analytics Properties ?

To display identifiable data in W

☐ Name ☐ Type ☐ Role ☐

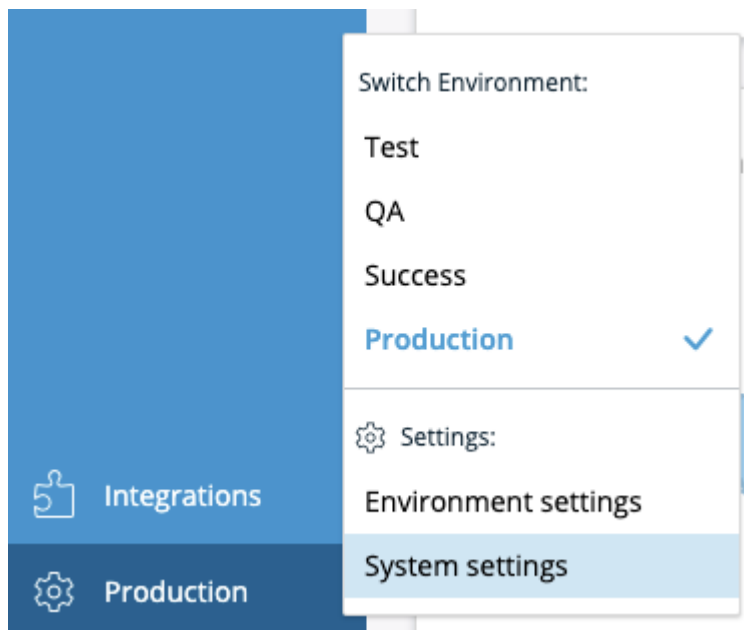
None
Walkme ID
Cookie
jQuery
Variable
Salesforce User ID

API property

- Supports any JavaScript variable that's accessible via the Window object
- Results will group based on the assigned value (meaning the assigned value should hold the account name and not the email)
- An example of an API parameter that indicates or specifies an account could be something like "account_id" or "account_key"

Activating this Feature

1. Open **Insights** at insights.walkme.com and go to: **Production** → **System settings** → **Account level analytics**



2. Toggle on **Enable account-level analytics**

3. Select the desired Account identifier from the dropdown (Email or API property) and set the value
4. Click **Save**
5. Perform a settings publish

Account-level analytics

☒ Enable account-level analytics

Enable or disable the ability to view user behavior by account, rather than end-user behavior.

Account identifier

API property ▼

pieParameters.userEmail



SAVE SETTINGS