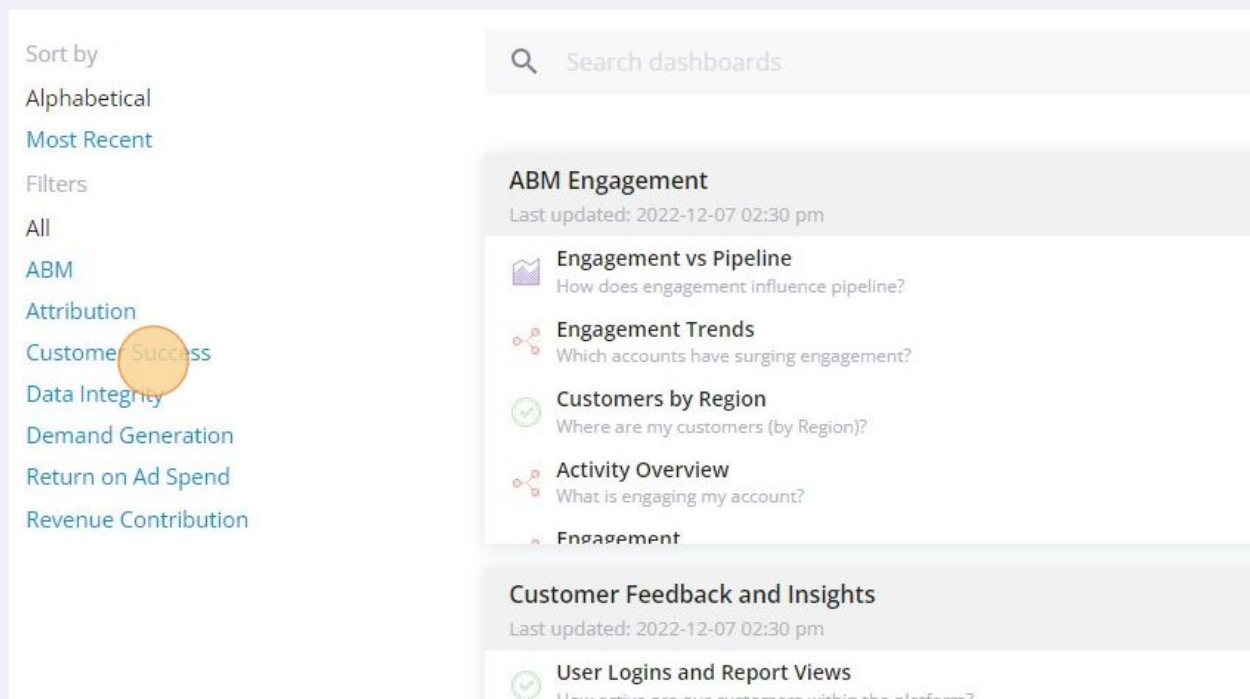


Calibermind Workflow

How to see user activity in CaliberMind

1 Navigate to <https://my.calibermind.com/analytics/dashboards>

2 Click "Customer Success"



The screenshot displays the CaliberMind analytics dashboard. On the left, a sidebar lists various categories under 'Sort by' and 'Filters'. The 'Customer Success' filter is highlighted with an orange circle. The main content area features a search bar and two dashboard sections: 'ABM Engagement' and 'Customer Feedback and Insights'. The 'ABM Engagement' section is updated as of 2022-12-07 02:30 pm and includes sub-sections like 'Engagement vs Pipeline', 'Engagement Trends', 'Customers by Region', and 'Activity Overview'. The 'Customer Feedback and Insights' section is also updated as of 2022-12-07 02:30 pm and includes 'User Logins and Report Views'.

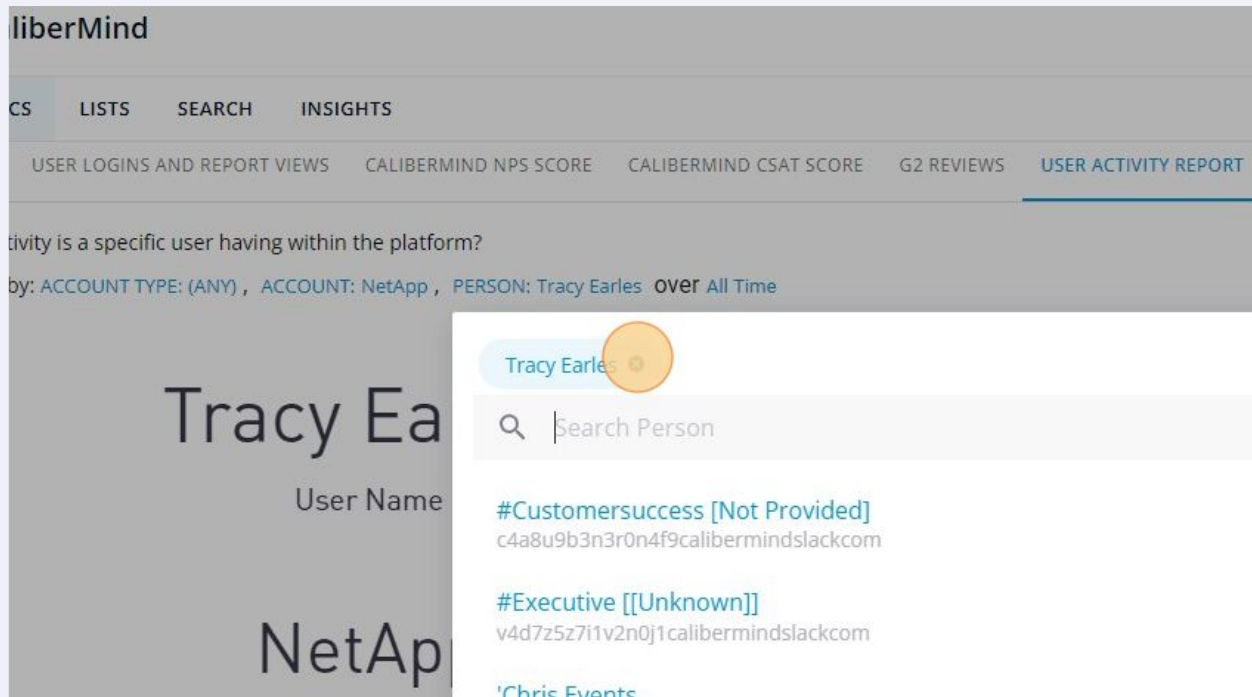
3 Click "User Activity Report"

The screenshot shows a dashboard with two main sections. The top section is titled "Customer Feedback and Insights" and lists several metrics: "How active are our customers within the platform?", "CaliberMind NPS Score", "CaliberMind CSAT Score", "G2 Reviews", and "User Activity Report". The "User Activity Report" option is highlighted with a blue circle. The bottom section is titled "Example Dashboard" and lists "Account Detail", "Ad Performance by Platform", and "Attribution Overview (by close)".

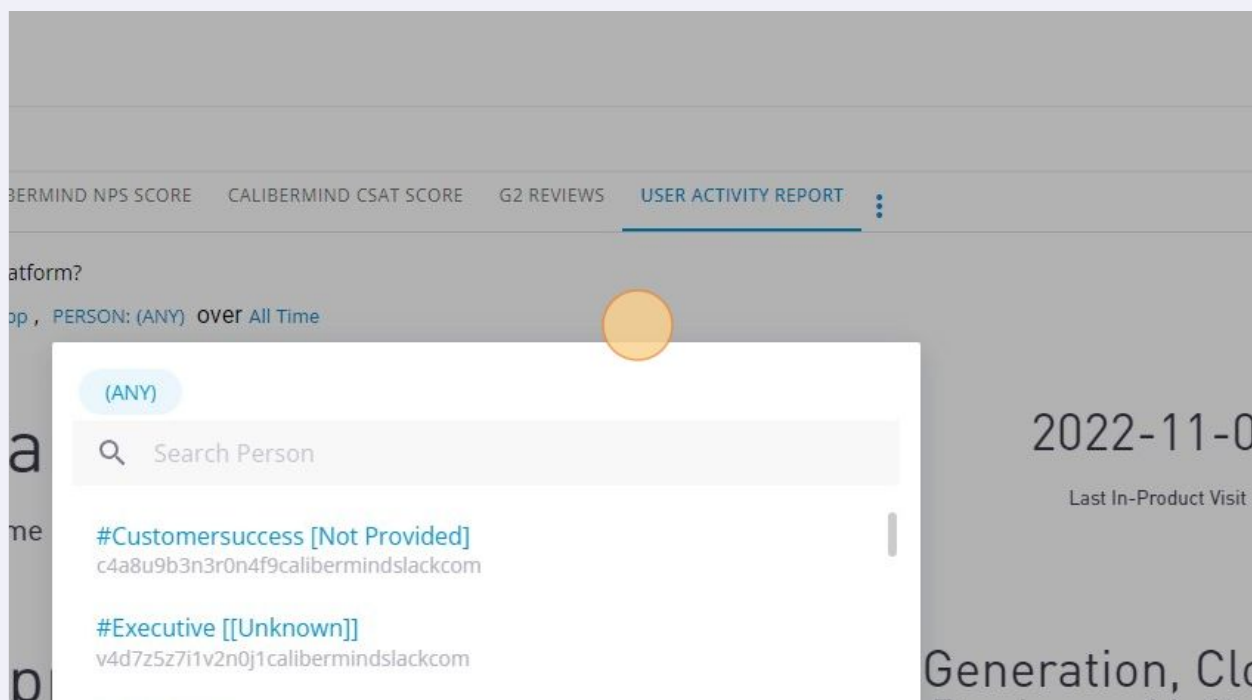
4 Click and filters in the 'Person' filter if you want to see ALL USERS otherwise input the specific user name(s)

The screenshot shows the "User Activity Report" page in the CaliberMind interface. The page title is "What activity is a specific user having within the platform?". Below the title, there are filters: "ACCOUNT TYPE: (ANY)", "ACCOUNT: NetApp", "PERSON: Tracy Earles", and "OVER All Time". The "PERSON: Tracy Earles" filter is highlighted with a blue circle. Below the filters, the user's name "Tracy Earles" is displayed, along with the role "Standard" and the account name "NetApp".

5 Click the X icon to remove all filters



6 Click outside of the white filter dialog box to refresh the screen.



7

Click the hamburger menu to the right of the table if you want to download the data.

36.5k
Page Views - all time

More Options

	LOGINS 60 DAYS	LOGINS 90 DAYS	LOGINS 180 DAYS	LOGINS 365 DAYS	LOGINS ALL TIME
0	0	0	0	0	0
0	0	0	0	0	1
0	0	0	0	0	47
0	0	0	0	0	0

8

Click "Download Data" to continue the download process.

More Options

	LOGINS 60 DAYS	LOGINS 90 DAYS	LOGINS 180 DAYS	LOGINS 365 DAYS	LOGINS ALL TIME
0	0	0	0	0	0
0	0	0	0	0	0
0	0	0	0	0	0
0	0	0	0	0	0

Edit Pivot
Search
Download Data
1046 Rows

REPORT VIEWS 60 DAYS REPORT VIEWS 90 DAYS REPORT VIEWS 180 DAYS REPORT VIEWS 365 DAYS REPORT VIEWS ALL TIME