Application Help for SAP Emarsys

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Smart Insight

Smart Insight is the SAP Emarsys customer intelligence module, designed to maximize the revenue from your customers by automating your retention marketing.

i Note

- Smart Insight is a paid feature. If you are interested in adding this to your SAP Emarsys account, please contact your Client Success Manager.
- Have a look at a brief and portable summary of this feature along with some relevant customer testimonies.

→ Tip

As a quick reminder, here is the onboarding video about **Smart Insight:**

Disclaimer: The below video is not part of the SAP product documentation. Please read the legal disclaimer for video links before viewing this video.

Onboarding video - Smart Insight (1/3) Customer Lifecycle Dashboard

06:21

SAP Emarsys

What is Smart Insight?

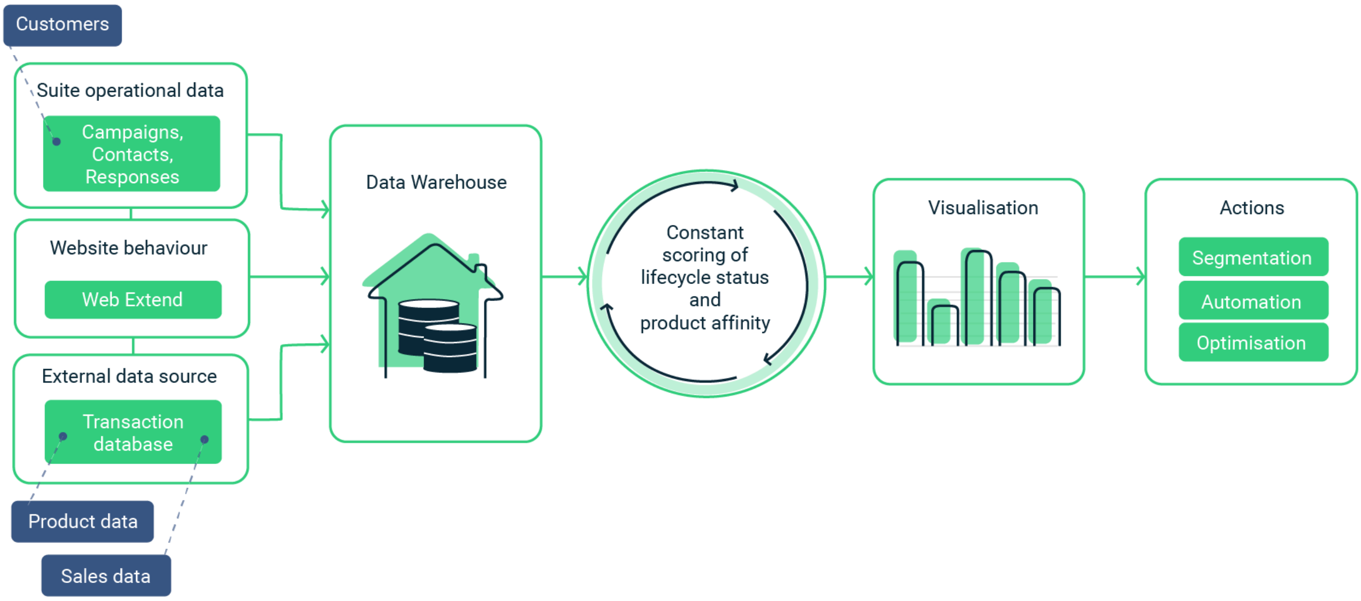
Smart Insight collects data from all your touch points in a Big Data model and converts this into intelligent information using advanced scoring models and predictive algorithms. This data can be uploaded from external sources as well as collected by the Web Extend data collectionscripts directly from your website.

Using the collective browse and purchase history of your web shop, as well as the individual contact response data from all your marketing channels, Smart Insight helps you categorize your contact database into smart segments based on predictions of their future behavior.

It then helps you to monitor how you are engaging with each of these segments, using cutting-edge data visualizations and in-depth analysis that give real-time values to each contact in each lifecycle stage.

Smart Insight is an integrated solution for marketers that utilizes customer data from various touch points in order to provide actionable intelligence focused on customer engagement. Smart Insight addresses the following primary requirements of datadriven marketing:

- The need to collect, physically store and analyze continuously-rising data volumes.
- The need to convert data into actionable intelligence.
- The need to use this intelligence to engage with contacts according to where they are in the customer lifecycle.



How does it work?

First steps

First of all, we will need regular sales data from you. For more information on how to format and upload your sales data, see Preparing your sales data file.

i Note

For the proper operation of Smart Insight you must upload on a daily basis your most recent contact, purchase and product data.

Smart Insight profiler

SAP Emarsys collects your historical purchase data (default is last 2 years of data) and runs it through clustering algorithms, and makes eRFM parameter recommendations for you. These parameters will in turn be used to segment contacts automatically on the Customer Lifecycle screen.

Data collection scripts

Online behavior data collection scripts capture valuable information from your website and use this for engagement scoring (contact behavior) and affinity scoring (product clustering).

Why should I be using Smart Insight?

With Smart Insight you can set your own eRFM scoring parameters and create just the right lifecycle segments for your business model.

Fully integrated into the SAP Emarsys Marketing Platform, it encourages you to automate your marketing and experiment with innovative strategies for each segment.

Real-time reporting puts current and predicted future revenue on screen per segment, letting you decide where to spend your marketing budget for the best returns.

What can Smart Insight do for my business?

Smart Insight enables the storing of large volumes of data in a Big Data model, which provides real-time, clear, transparent and actionable intelligence. Smart Insight is delivered with built-in analysis algorithms focused on customer lifecycle marketing, which display their results on pre-configured screens. To populate these screens, Smart Insight uses data from external transactional databases in combination with automatically tracked website behavior and campaign response data from SAP Emarsys.

Smart Insight is built in a user-friendly and focused way to make sure you actually use it, and not drown in an ocean of data and possibilities. It recommends clearly what you should concentrate on and what you should do today, allowing you to drill down and analyze where necessary.

You can use your own data to understand your customers better and target them individually, using their own behavior to dictate your strategy.

With built in, turn-key use cases per vertical and out-of-the-box measurement screens, Smart Insight gives you both the intelligence and the tools to target each customer with the right products at the right time, automatically.

The Smart Insight screens

For more information, see Smart Insight Screens.

Supported functionality

- Lifecycle Snapshots: See a snapshot of your customer distribution by lifecycle and spend.
- Find your Next Best Actions: Find the next best action based on analysis provided by data mining and machine learning.
- Product Affinities: Discover similarities between people that share affinity with specific products.
- Smart Metrics: Combine conversion rates, revenue predictions, purchase patterns, and engagement statistics to comprehend personas.
- Success Attribution: Understand the contribution of your engagement efforts to the business' overall revenue generation.
- New Lead Conversion: Boost the efficiency of your lead-conversion funnel.
- Cross- and Up-sell Campaigns: Remind customers to restock just as their products begin to run out, or suggest specific products based on past purchases or predicted product affinity.
- Execute automated lifecycle campaigns: Identify revenue distribution according to purchase behavior, or to compare one-off purchase volume with recurring purchase volume.
- Conversion Rate Performance: Measure how well the business is converting customers by lifecycle group.
- True Added Value: Apply scientific control group split testing to verify campaign performance and identify where campaigns are adding true value.

Related Information

Checklist for Setting Up Smart Insight Manually

Checklist for Setting Up Smart Insight Manually

This article contains tables detailing all the steps that are necessary for Smart Insight feature to run smoothly in your account. It has been compiled for the person or team responsible for setting up and configuring Smart Insight.

We have divided the things to check into three categories:

- Minimum requirements
- Recommended items
- Good to know

By checking off the items in this list you can ensure that Smart Insight is set up properly and will be working as intended.

Although the tables below contain items that are not mandatory, best results are achieved if all of these are properly set up.

Minimum requirements

These are the requirements that are absolutely necessary for Smart Insight to function. Without these, the system can work erratically. These should all be checked off before the system goes into production.

TO CHECK	WHERE IS IT?	LINK TO DOCUMENTATION
GENERAL		
Is there an admin with BI admin right under the account?	Under Management/User Manamegent menu item.	Learn more
ARE THE FOLLOWING MENU ITEMS VISIBLE IN THE UI?		
Analytics/Customer Lifecycle	Under Analytics menu item.	Learn more
Analytics/Predictive Affinity	Under Analytics menu item.	Learn more
Analytics/Impact	Under Analytics menu item.	Learn more
Management/Smart Insight Data Quality	Under Management menu item.	Learn more
Management/Smart Insight Settings	Under Management menu item.	Learn more
Analytics/Store Dashboard (for clients who have this feature enabled)	Under Analytics menu item.	Learn more
Store menu item (for clients who have this feature enabled)	Under Management/Smart Insight Settings menu item.	Learn more
DATA UPLOAD CONFIGURATION		
Is the FTP configured?	Under Management/Smart Insight Settings menu item.	Learn more
Is the daily data load running?	Under Management/Smart Insight Settings/ Advanced menu item.	Learn more
Was there a historical load with past purchase data?	Check 'Oldest purchase' item under Management/Smart Insight Data Quality.	Learn more
Was there a historical load with store data (for clients who have this feature enabled)?	Under Management/Smart Insight Settings/Stores menu item.	Learn more
Are the purchase delta files loaded?	Under Management/Smart Insight Data Quality/Data Loads menu item.	Learn more

TO CHECK	WHERE IS IT?	LINK TO DOCUMENTATION
Are the product files loaded every day?	Under Management/Smart Insight Data Quality/Data Loads menu item.	Learn more
Are the contact exports loaded every day?	Under Management/Smart Insight Data Quality/Data Loads menu item.	Learn more
DATA FILE CONFIGURATION		
If the sales files are sent via Predict, are these forwarded to Smart Insight under Data Sources/Sales data?	Under Management/Data Sources/Sales data menu item.	Learn more
Does the structure of the sales files match the settings under Management/ Smart Insight Settings (count of fields, order of fields, content of fields)?	Comparison of the file and Management/Smart Insight Settings/Purchase Fields.	Learn more
Does the structure of the product files match the settings under Management/ Smart Insight Settings (count of fields, order of fields, content of fields)?	Comparison of the file and Management/Smart Insight Settings/Product Fields.	Learn more
Does the unique identifier for contacts match the user identifier sent in the sales files based on account settings?	Comparison of the file and Management/Smart Insight Settings/Purchase Fields.	Learn more
Does the unique identifier for products match the item identifier sent in the sales files based on account settings?	Comparison of the file and Management/Smart Insight Settings/Product Fields.	Learn more
Does the unique identifier for stores match the store identifier sent in the sales files based on account settings (for clients who have this feature enabled)?	Comparison of the file and Management/Smart Insight Settings/Store Fields.	Learn more

Recommended items

These checks help the smooth operation of Smart Insight. By implementing these you can make sure that the calculations will be correct.

TO CHECK	WHERE IS IT?	LINK TO DOCUMENTATION
CONTACTS, PRODUCTS AND PURCHASES		
Are there many contacts with negative total turnover?	Under Management/Smart Insight Data Quality menu item.	Learn more
Are there many unidentifed contacts (i.e. buyers who appear in your sales files, but not in your contact database)?	Under Management/Smart Insight Data Quality menu item.	Learn more
Do you have a high percentage of outlier purchases coming from a single contact (e.g. automated test purchases, all offline purchases assigned to a single contact, B2B purchases, etc.)?	Under Management/Smart Insight Data Quality menu item.	Learn more

TO CHECK	WHERE IS IT?	LINK TO DOCUMENTATION
Do you have a high percentage of unknown products (i.e. products purchased that are not in your product catalog becuse, for example, you don't load a full catalog everyday)?	Under Management/Smart Insight Data Quality menu item.	Learn more
Do you have a high percentage of products with no category?	Under Management/Smart Insight Data Quality menu item.	Learn more
Do you have a high percentage of products with no name?	Under Management/Smart Insight Data Quality menu item.	Learn more
Do you have the right product hierarchy level set with meaniningful information? (e.g. if a category level looks like men/shirts/casual shirts choosing the second level is better than the first)	Under Management/Smart Insight Data Quality menu item.	Learn more
Do you have duplicated purchases? (depending on how you send in a purchase where one contact in the same order bought the same product twice, in two identical lines or in one line with amount = 2)?	Under Management/Smart Insight Data Quality menu item.	Learn more
Do you have missing purchase days?	Under Management/Smart Insight Data Quality menu item.	Learn more
Do you have purchase dates in the future?	Under Management/Smart Insight Data Quality menu item.	Learn more
Do you send in refunds in the expected way?	Under Management/Smart Insight Data Quality menu item.	Learn more
Do you have the same orders with multiple contacts?	Under Management/Smart Insight Data Quality menu item.	Learn more
Are the notification treshold values set according to what you expect from the system on alerting level?	Under Management/Smart Insight Data Quality menu item.	Learn more
GENERAL		
Do you have the Smart Insight FTP password saved on your side?	On the client’s side.	
Do the actual RFM limits fit your business realities?	Under Analytics/Customer Lifecycle/RFM Advisor.	Learn more
If you have recurring automations based on Smart Insight data, is the start time in sync with the Smart Insight daily load time?	Under Automations/Automation programs + Smart Insight Settings page.	
Make sure that in the `price` column you send the total price (i.e. unit price * quantity).	In the sales files.	Learn more
If the client has a custom field with the real registration date for their contacts this	Under Management/Smart Insight Settings menu item.	Learn more

TO CHECK	WHERE IS IT?	LINK TO DOCUMENTATION
should be used instead of the SAP Emarsys system field 'date of first registration' because the latter one represents the date when the contact was first loaded to the SAP Emarsys DB, not necessarily the date when the user in reality signed up on customer side. This can affect the lead lifecycle calculation.		
Make sure your Smart Insight admins are subscribed to Smart Insight related system notifications.	Under Notifications/Settings.	Learn more
It is recommended to keep a copy of all purchase files sent to SAP Emarsys for future investigations, re-sets because we delete the received files after 30 days.	Client's own data center.	
Use the same `order id` in Web Extend and sales data.		Learn more

Good to know

These items are the extra mile.

TO CHECK	WHERE IS IT?	LINK TO DOCUMENTATION
If you are sending purchase files via Predict and you wish to reload all data you need to contact Support.	On the client’s side.	
Make sure to have all of your data files properly set up, as if some erroneous data enters the database, there is no other way to modify them than to reload all historical Smart Insight data.	On the client’s side.	Learn more

Migrating Smart Insight to the Cloud

To provide you with a faster Smart Insight service with enhanced scalability, currently, we are working on migrating Smart Insight to the Cloud.

Besides migrating the database, this process also involves rewriting the Smart Insight calculations. When this update is available in your account, you may experience minor differences in the reporting screens and segmentation results. Besides, you will also experience that Smart Insight runs faster in the Cloud.

We ensure that your current implementation is compared to the previous one and we also investigate any unknown discrepancies that may occur. Here you can find the known edge cases that can cause these differences:

- **Differences may occur due to a stricter deletion process**:
  - The contact count may be slightly lower because some contacts who should have been deleted earlier are now removed from the calculations.
  - The corresponding purchases of the deleted contacts are also removed from the calculations.

- Now, product affinity connections are removed when a contact loses their affinity.

- **Differences may occur due to whitespace handling**:
  - Previously, the connections of contacts, products and stores with unique identifiers containing whitespaces may have been unresolved. Now whitespaces are preserved to provide you with a more consistent Smart Insight service. However, some inconsistencies may still be present while the Cloud migration is in progress. To mitigate such issues, we recommend avoiding the use of whitespaces in identifiers.
- Previously, product affinities were truncated after 255 characters. Now contacts can have unlimited affinities.
- **Differences may occur due to refund handling**:
  - The `refunds_affect_lifecycles` setting affected some calculations unrelated to lifecycles, for example, the order aggregation for a contact. This setting now only affects the lifecycle of a contact.
  - The calculations of contact turnover and number of purchases now handle refunds more consistently for fully refunded orders.

Smart Metrics Explained

For each customer lifecycle segment, Smart Insight calculates a set of metrics that enable you to understand and profile your segments, and monitors how these key metrics change over time. In this article you can find a detailed explanation of these **Smart Metrics**, to help you interpret the Smart Insight screens more effectively.

What are Smart Metrics?

Smart Metrics are ultra-focused and condensed analytics that drive decisions to maximize customer value.

Your customers are your assets, and to maximize the value of your assets you first need to know how much they are worth, then to know how they react to your actions (or lack of actions) and finally the impact this has on your bottom line. Then you can make decisions and allocate your marketing budget and resources in the areas which will bring the most benefit to your business. Smart Metrics help you make these decisions.

In other words, Smart Metrics analyze the past activity of your contacts to help you predict their future behavior.

They provide you with key metrics around:

- Conversion rates - These give you an at-a-glance overview of your success with each lifecycle stage.
- Historical revenue - Past purchase data is used to provide the up-to-date average spending figures.
- Predictive revenue - Past purchase data is used to predict future revenue figures.
- Purchase patterns - general - Past purchase behavior is used to provide the most likely current and predicted items to be purchased.
- Purchase patterns - per lifecycle stage - The exact definition of the purchase patterns metrics is broken down for each lifecycle stage.

Each of these are tailored for the optimization of your retention automation.

Conversion Rates

The contribution that can be attributed to SAP Emarsys campaigns is shown as an extra metric in these charts, in green.

> **i Note**
> The actual numbers of days used in the explanation below are just examples; these are determined during setup when you establish your eRFM parameters.

Conversion rate

This measurement describes how many of your leads (contacts who registered for more than one day, but didn't make a purchase yet) you manage to convert to first-time buyers before they become cold leads. This is re-calculated every day to represent your current performance as **the percentage of contacts who registered in the last 180 days and have since converted to customers by making their first purchase**. Please note that new customers who register and make their first purchase on the same day are treated as direct first-time buyers and will not be counted in the lead conversion figures.

Re-purchase rate

This measurement describes how many of your first-time buyers (contacts who bought only once) you manage to convert to become active buyers (contacts who have bought more than once) before they become defecting buyers. This is re-calculated every day to represent your current performance as **the percentage of contacts who converted to first-time buyers in the last 90 days and have since become active by making a second purchase**.

Retention rate

This measurement describes how many of your active customers (contacts who bought more than once) you manage to keep as active (meaning they buy again before they become defecting buyers). This is re-calculated every day to represent your current performance as **the percentage of active customers who made a purchase exactly 90 days ago and have since made another purchase**.

Win-back rate (defecting)

This measurement describes how many of your defecting customers (contacts who didn't buy recently according to your RFM definition) you manage to convert to active (meaning they buy again before they become inactive buyers). This is re-calculated every day to represent your current performance as **the percentage of customers who defected in the last 275 days and have since become active again by making a new purchase**.

Win-back rate (inactive)

This measurement describes how many of your inactive customers (contacts who didn't buy for a long period according to your RFM definition) you manage to convert to active (meaning they buy again). This is re-calculated every day to represent your current performance as **the percentage of customers who became inactive in the last 275 days and have since become active again by making a new purchase**.

Historical Revenue

Historical Revenue provides you with up-to-date average spending figures based on past purchase data.

- Average historical spend
- Revenue from current purchases
- Each 1% in conversion brought

Average historical spend

For each contact we calculate how much they have spent ***in their entire history***. This metric is then calculated as an average for all the contacts in each lifecycle stage at the current time.

Smart Insight also looks into the real revenue figures over the past 30 days to provide figures so that you can compare the performance of the different lifecycle stages.

Revenue from current purchases

This figure sums the revenue generated from ***all purchases made in the last 30 days*** by people that were in this lifecycle stage when they made the purchase. For example, for defecting customers this would be the total revenue from the win-back purchases made by defecting customers as they returned to being active customers.

Each 1% in conversion brought

This figure provides a real monetary value for ***each percentage point*** of the conversion rate for this lifecycle stage. This is an aid to put these conversion numbers in to a better business context. It is calculated by simply dividing the revenue in the last 30 days by the current conversion rate.

When the **Best revenue potential** indicator is shown, it means that out of all the lifecycle stages, this one gave the highest return per percentage point.

Predictive Revenue

Smart Insight looks at the historical average spending figures for customers in each lifecycle stage and uses these to give an average value to each customer in each stage.

Predicted revenues are then calculated by matching the ***likelihood*** of a contact to convert in each stage with the ***values*** those conversions would bring. This takes into account not only the initial conversion, but also the average revenue of all subsequent repeat purchases and conversions, giving a ***predicted lifetime value***.

- Examples of predictive revenue
- Predicted average future spend
- Average lifetime spend
- Average lifetime spend
- Each 1% in conversion will bring

Examples of predictive revenue

- Leads - if 10% of leads convert within 180 days and spend an average of €30 converting, the value of each lead is calculated as:
    - (10 x 30) / 100 = **€3**

- First-time buyers - if 15% of first-time buyers make a second purchase and spend an average of €40 doing it, the value of each first-time buyer is calculated as:
  - (15 x 40) / 100 = **€6**
- Active buyers - if 45% of active buyers make repeat purchases within 90 days and spend an average of €50, the value of each active buyer is calculated as:
  - (45 x 50) / 100 = **€22.50**
- Defecting customers - if 25% of defecting customers (no repeat purchase in 90 days) become active again and spend an average of €50 doing it, the value of defecting customers is calculated as:
  - (25 x 50) / 100 = **€12.50**
- Inactive customers - if 10% of inactive customers (no repeat purchase in 275 days) become active again and spend an average of €50 doing it, the value of inactive customers is calculated as:
  - (10 x 50) / 100 = **€5**

Predicted average future spend

For each contact we calculate how much they are ***likely to spend*** in the future, based on their historical spend level, the average value of contacts in their lifecycle stage, the conversion rate of that stage, and how much people like them have spent when converting in the past. This is calculated for each contact individually and then averaged out.

Average lifetime spend

For each contact we add up both their ***individual historical*** spend and their ***predicted future*** spend. This metric is then calculated as an average for all the contacts that are in each lifecycle stage right now.

Smart Insight also looks into the real revenue figures over the past 30 days to provide figures that can be used to compare the performance of different lifecycle stages.

Predicted future revenue increase

This is how much revenue you ***might expect to earn*** from contacts who have converted to this lifecycle stage in the past 30 days. It is calculated by summing the difference in the **Predicted average future spend** for each one of these contacts as they moved from one lifecycle stage to another.

Each 1% in conversion will bring

This figure predicts what each percentage point of the conversion rate ***will bring your business*** in future revenue. It helps you to judge how much time and money it is worth investing to increase the conversion rate by each percentage point.

The figure is calculated by simply dividing the future revenue increase in the last 30 days by the current conversion rate.

Purchase Patterns - General

These metrics dig deeper into the purchases themselves, focusing on the context and circumstances of the purchase, and appear in all lifecycle stages.

- Number of purchases in lifetime
- From registration to most recent purchase
- Average spend
- Mostly bought

→ **Tip**

Data Distribution: Difference between median and average values

Median values reflect the typical behavior while mean values show the average behavior. For purchase patterns, due to the nature of the measured data, averages tend to be higher than mean values. The reason for this, the lower limit of the measured values is zero (no purchases) but there is no upper limit for them.

Average values can be affected by both the behavior of contacts (very high spenders) or data errors (high number of purchases attributed to a single contact).

For more information on creating a segment for certain behaviors, see Using attributes to filter charts and Customer Lifecycle Report. An alternative is Creating AI segments for customers based on their cart value.

Number of purchases in lifetime

This metric shows ***how many purchases*** a customer has made in this stage. This metric is calculated both as a ***mean*** (average) and as a ***median*** (mid-ranking value) for all the contacts that are in each lifecycle stage right now.

From registration to most recent purchase

This metric shows the ***number*** of days from registration to the most recent purchase for a contact in this lifecycle stage. It is calculated both as a ***mean*** and as a ***median*** for all the contacts that are in each lifecycle stage right now.

Average spend

Located in the main row of the Dashboard, this metric shows the ***average value of orders*** made in the last 30 days by customers in each lifecycle stage. For example, in **Defecting Customers** it shows the average order value of defecting customers when they come back to become active customers. The value includes all the items bought in each order.

Mostly bought

Located in the main row of the Dashboard, this metric shows the ***most common product category*** to be purchased in the last 30 days by customers in each lifecycle stage. For example, in **Defecting Customers** it shows the most popular product category purchased by defecting customers when they come back to become active customers.

Purchase Patterns - Per Lifecycle Stage

The following metrics apply only to their respective lifecycle stage.

- Leads - From registration to first purchase
- First-time buyers - From first to second purchase
- First-time buyers - Instant first-time buyers
- Active customers - From purchase to repurchase
- Defecting customers - From defecting to win-back
- Defecting customers - Win-back rate for first-time buyers
- Defecting customers - Win-back rate for active customers
- Defecting customers - First-time buyers
- Defecting customers - Active customers

- Inactive customers - From inactive to win-back
- Inactive customers - Win-back rate for first-time buyers
- Inactive customers - Win-back rate for active customers
- Inactive customers - First-time buyers
- Inactive customers - Active customers

Leads

From registration to first purchase

This metric shows the ***number of days*** it takes a lead from registering to making the first purchase. This does not include **Instant first-time buyers** who registered and converted on the same day. This metric is calculated both as an average and as a median for all the contacts that were ever leads (except the instant first-time buyers).

First-time buyers

From first to second purchase

This metric shows the ***number of days*** it takes a first-time buyer from making the first to the second purchase. This metric is calculated both as an average and as a median for all the contacts that were ever first-time buyers.

Instant first-time buyers

This metric shows the ***percentage*** of first-time buyers that became first-time buyers ***on the same day*** that they registered. In our terms these people were never leads. This metric is calculated as the percentage of current first-time buyers who became first-time buyers on the same day as registration.

Active customers

From purchase to repurchase

This metric shows the ***number of days*** it takes an active customer to make a purchase following their previous purchase. This metric is calculated both as an ***mean*** and as a ***median*** for all the purchases that were ever made by active customers.

Defecting customers

From defecting to win-back

This metric shows the ***number of days*** that lapse between a customer defecting and then becoming active again by making another purchase. This metric is calculated both as an ***mean*** and as a ***median*** for all the win-back purchases of all the contacts that were ever defecting customers and returned to being active.

Win-back rate for first-time buyers

This metric shows the ***win-back rate*** for those defecting customers that are actually defecting **First-time buyers**. This metric is calculated in the same way as the main win-back rate (i.e. the % of customers that became defecting in the last X days and since then became active again), but only for the defecting customers that only ever made one purchase before.

Win-back rate for active customers

This metric is similar to the one above, but instead shows the win-back rate for those defecting customers that are actually defecting **Active customers**. This metric is calculated in the same way, but only for the defecting customers that made more than one purchase before.

First-time buyers

This metric shows how many of your defecting customers right now have made ***only one purchase*** before.

Active customers

This metric shows how many of your defecting customers right now have made ***more than one purchase*** before.

Inactive customers

From inactive to win-back

This metric shows the ***number of days*** that lapse between a customer becoming inactive and then becoming active again by making another purchase. This metric is calculated both as an average and as a median for all the win-back purchases of all the contacts that were ever **Inactive customers** and returned to being active.

Win-back rate for first-time buyers

This metric shows the ***win-back rate*** for those inactive customers that are actually defecting **First-time buyers**. This metric is calculated in the same way as the main win-back rate (i.e. the % of customers that became inactive in the last X days and since then became active again), but only for the inactive customers that only ever made one purchase before.

Win-back rate for active customers

This metric is similar to the one above, but instead shows the win-back rate for those inactive customers that are actually "inactive **Active customers**". This metric is calculated in the same way, but only for the inactive customers that made more than one purchase before.

First-time buyers

This metric shows how many of your inactive customers right now have made ***only one purchase*** before.

Active customers

This metric shows how many of your inactive customers right now have made ***more than one purchase*** before.

Smart Insight Setup FAQ

Loading the Sales Items File

For more information, see [Loading the Sales Items File](#).

Loading the Products File

For more information, see [Loading the Products File](#).

Refunds Handling

For more information, see Refunds Handling.

Loading Contacts

For more information, see Loading Contacts.

Filters

What are 'Total Amount spent' and 'Number of purchases' on the Contacts/Segmentation page?

These filters can be used to create segments like 'total spend or number of purchases in a given time period and /or to a given product.' These filters differ somehow from the two filters with similar names on Customer Lifecycle (Total lifetime spend and Total lifetime purchases) because while those work from contact data, these two work from purchase data. Those contacts who register and purchase on the same day are regarded as leads for the first day and would turn to customer only the second day.

However, their orders would be loaded to the data warehouse on the first day already, while they are leads from the system's point of view. This can result in slightly different numbers between the segments created with these similar filters.

For more information on filters and attributes, see Smart Insight Attributes and Filters.

Duplication

What happens if there are duplicate orders in my sales data?

Due to incorrect sales data (i.e. duplicate orders), your results or Smart Insight screens will be distorted. In this case, we recommend reloading your Smart Insight data. For more information, see Reloading data into Smart Insight.

Loading the Sales Items File

Here you can find frequently asked questions about loading the sales items file into Smart Insight.

Is Web Extend required for loading the sales data file?

No, Web Extend is not required. It is Smart Insight that collects your sales data from external sources.

What happens if there is no order ID in the sales data file?

The loading fails. This is a mandatory field. The file must be corrected and sent again.

What happens if the order date is missing from the sales data file?

The loading fails. This is a mandatory field. The file must be corrected and sent again.

What happens if the customer ID in the sales file is missing from the contact database?

We 'create' a pseudo contact for this order (basically all such orders are attached to one pseudo contact). This contact would appear as 'generated' on the Smart Insight screens and could not be matched with any contact in SAP Emarsys.

Could the above issue be fixed by re-sending the same order with the customer ID added?

No. This would duplicate the order, one would be loaded for the 'pseudo' contact and the other to the 'real' contact. The file must be corrected by you and a new complete reload is done by us. You are intended to communicate the problematic file load to Support and we do the reload.

What happens if the customer ID is missing from the sales data file? (customer ID = unique customer identifier field that we use to match orders with SAP Emarsys contacts)

An order with a customer ID missing from the SAP Emarsys contact database will be loaded to the data warehouse and the related contact will be generated with only an internal Smart Insight customer ID (that you cannot use later for identification) and flagged as `generated` in Customer Lifecycle. The value of the `number_of_purchase` field of contacts flagged as `generated` is set to 1. Although a single contact might make multiple purchases, these contacts cannot be merged into a single entry in the database. By using the `generated` filter and setting the value of the `number_of_purchase` field to 1, this contact can be separated from the ones where the connection could be made between the orders file and contact DB.

Could the above issue be fixed by populating the missing customer IDs in SAP Emarsys?

Yes. If the unique customer identifier is added to a contact who previously was loaded as 'generated', they will turn to a 'valid' contact by the next data load.

What columns are mandatory in the sales data file?

- **order** - The order ID of the order that this item was purchased in.
- **timestamp** - The date of the purchase.
- **customer** - The ID of the customer who made the purchase. This must be contact data from the SAP Emarsys database.
- **item** - The ID of the product that was purchased.
- **price** - The total price of the item.
- **quantity** - The number of items bought.

What date formats are accepted?

`YYYY-MM-DD` is preferred. If `HH:MM:(SS)` is also sent, time will not be taken into account.

Can we have additional columns?

It is possible to add custom fields to the sales file as long as the field name starts with prefix "`c_`" (e.g., `c_brand`, `c_webshop`). Please note that the order of the columns matters. Columns can be sent in any order, but it must always be the same. End of columns must not contain empty rows.

Is it possible to have the unit item price and the number of purchased items (quantity) in the files and would SI calculate the total sales amount based on these?

No, the files we load contain the total price for items (e.g. 2 items cost 5 EUR altogether). No unit price is displayed and we don't support such calculations in SI.

If there is an error in the sales file, will the good records still be loaded and the bad ones omitted from the load?

No, the load process stops and nothing from the sales file will be loaded. The error has to be fixed by you and the file needs to be reloaded after the fix by us.

What happens with the contacts who have purchase(s) which are negative (have only refunded items) or zero (have only free items)?

They will be loaded as leads (contacts who have not bought anything yet). If they are not identifiable (cannot be matched with any SAP Emarsys contacts) they will be 'generated leads' with **Unknown** lead source and **New lead** lifecycle status.

What happens if there is no header in the sales (or product) data file?

If there is no header in the file, the first row will be lost as this will count as a header. Header is required.

What happens if we get a purchase without a product ID in the sales data file? Do we load that as an unknown item?

No, in this case the loading would fail. We only create 'unknown products' when the product ID for an order is missing from the product catalog. The file must be corrected and sent again.

Why is it important to upload the historical sales data and product data file at same the time?

To ensure that Smart Insight calculations and analytics work properly, the product catalog has to include the items the sales data file is referring to. Otherwise, Smart Insight reports will contain unknown products and this issue cannot be resolved even by uploading your historical product data file again.

When do new purchases appear in Smart Insight lifecycle segments and reports?

New purchases are displayed in Smart Insight lifecycle segments and reports only after a data load that takes place on the following day (new purchases will not be registered even if you perform multiple sales data loads on the same day when the data loads are made).

The filter **Total spent on selection** is an exception. This Smart Insight filter is based on real-time purchase data as opposed to the **Total lifetime spend** filter which is calculated after the data load that takes place the following day. For this reason, we recommend combining the **Total spent on selection** filter with other purchase attributes. Combining it with contact attributes such as **Customer lifecycle stage** may lead to inappropriate results. In this case, we recommend combining the filter **Customer lifecycle stage** with **Total lifetime spend**.

How do I need to format my sales data file if I'm using the Batch Sales Data Load solution?

If you are using our Batch Sales Data Load solution, then you need to format your sales data file according to the Standard Sales Data CSV file requirements.

Where can I check my sales data loads and data quality if I'm using the Batch Sales Data Load solution?

If you are using our [Batch Sales Data Load](#) solution, then you can check your sales data loads and data quality notifications on the **Management** > [Sales Data Loads](#) page.

Loading the Products File

Here you can find frequently asked questions about loading the products file into Smart Insight.

How should the product data file be sent?

Either:

- initial product catalog containing all products + daily deltas with the changes, or
- full product catalog each day, or
- daily feed only with the products that were ordered that day?

You should upload your full product catalog every time, to ensure consistency.

What columns are mandatory in the product data file?

These columns are needed for SI, only the **itemID** is mandatory.

- **item** (string) – The unique ID used in your system to identify an item. This is the ID that all data-collection and rendering scripts will refer to.
- **title** (string) – The name of the product.
- **category** (list of hierarchy levels) – Describes the category that a given item belongs to (e.g. `Electronics>Phones>iPhone|Telecommunication>Smart Phones>iPhone`). A hierarchy can consist of maximum 5 categories, but any number or hierarchies can be included.

What happens if there is no item (productID) in the product data file?

The loading fails. The file must be corrected and sent again.

What happens if the item is not unique within a single file?

The loading fails. The file must be corrected and sent again.

What happens if multiple products files are loaded at once and the same item can be found in several files?

The files are loaded one by one (in alphabetic order) thus the last occurrence of the item will overwrite all the previous ones.

What happens if there is no name for the product in the product data file?

The item will be loaded and displayed as Unknown product 'product ID' on the second graph of the Past Purchases screen. In this case, a product is created by us in the Emarsys database with only a product ID, no other data is provided for it. Note that if an item is not included in the product catalog, it will also be an unknown product.

What happens if there is no category in the product data file?

These items will be loaded, but they will not appear under any of the categories on the Past Purchases screen.

What happens if a product comes with an item (unique ID) already loaded to Smart Insight?

If an item that was loaded earlier comes again in a new file, the old item will be overwritten by the new one (e.g., modified product category or correction in item name).

Which category levels can be displayed on the first chart of the Past Purchases, Top Products, Average Order Value and the Dashboard screen?

By default, it is the first (top) level but any of the category hierarchy levels can be chosen for visualization. However, please note that the specified level cannot change from item to item (if it is set for category level 2, it applies to each and every item).

Refunds Handling

Here you can find frequently asked questions about how Smart Insight handles refunds.

Are refunds figured in the total number of orders?

Refunds themselves are not added to the total number of orders, but full refunds affect this metric as fully refunded orders are not included in the total number of orders. As a rule of thumb, any order or order part with a positive sales amount is added to the total number of orders, while those having a negative or 0 sales amount are not.

How should the refunds be included in the sale data file?

When submitting returned items or orders, always use the order, customer and item IDs of the original order and provide a negative value in both the `c_sales_amount` and the `quantity` fields. Please make sure to populate the fields in your sales data file this way, otherwise refunds will not be properly represented in your reports.

Example

This is how the original order is uploaded in the sales file:

Order ID	Date	Customer ID	Item ID	c_sales_amount	quantity
OR12345	15.10.2015	CU54343	IT8798	45	1
OR12345	15.10.2015	CU54343	IT2235	30	1
OR12345	15.10.2015	CU54343	IT8840	25	1

A week later the customer decided to return 2 items, which should be reported in the sales file as follows:

Order ID	Date	Customer ID	Item ID	c_sales_amount	quantity
OR12345	22.10.2015	CU54343	IT2235	-30	-1
OR12345	22.10.2015	CU54343	IT8840	-25	-1

These two order parts will then be aggregated into a single order with the total value of 45, while the order date will remain unchanged (i.e. we keep the date of the original order).

How do refunds affect the Revenue Impact screen?

On the **Revenue Impact** screen the orders are not aggregated. Each order contributes to the revenue of the day when it was made. If we take the above example, the 100 Euros will be added to the total revenue of 15 October, while the refund worth -55 Euros will be reported for 22 October.

Can we send the refunds in a separate file?

Sure. Just make sure that you follow the sales file naming convention, i.e. you name the file using the pattern `sales_items*.csv`. In other words, the file name must begin with the string `sales_item` and its extension must be .csv, while you can replace the asterisk with a number of characters of your choice.

How do returned orders affect customer lifecycle scoring?

As far as lifecycle scoring is concerned, any positive order counts as an activity, even if it is returned later. For example, if you upload an order with a positive sales amount for any of your **First-time buyers**, they will become and remain **Active buyers** even if the order will be refunded later, either fully or partially. Please note, however, that orders having a negative or zero value do not affect your customers' lifecycle scoring.

> **Note**
>
> **The Refunds affect lifecycle calculations option and orders with 0 sales amount**:
>
> - Regardless of whether the **Refunds affect lifecycle calculation** option is turned on or off, orders with 0 sales amount will not affect the Customer Lifecycle calculations.
> - If the **Refunds affect lifecycle calculation** option is turned on, then refunds will affect the number of orders, except for orders with 0 sales amount.

Are refunds added to the contacts' purchase statistics?

Returns and refunds are not taken into account when calculating the number of purchases or the last purchase date. They do not count as an engagement, either, so they are not considered when last engagement is calculated.

In general, refunds only affect the total turnover of the contact and thus their buyer status.

How do refunds affect the average order value shown on the reporting page?

Average order value is calculated by dividing the total of all sales amounts by the number of orders in the given period. Refunds are taken into account when calculating the total sales amount.

How about the total lifetime spend filter?

When calculating **Total lifetime spend** and the buyer status, all orders are taken into account, irrespective of whether their aggregated value is positive or negative.

How do refunds affect the Monetary score, which is always calculated for a given period?

The **Monetary score** is calculated by summing purchases over a defined time period. For returns, it is the date of the original order that matters. If that falls outside the time range, the order will not be taken into account when calculating the **Monetary score** (as well as total spend and buyer status), irrespective of whether the return transaction is within the given period.

Loading Contacts

Here you can find frequently asked questions about loading contacts into Smart Insight.

What happens if the custom registration date field is empty or doesn't exist in SAP Emarsys, and the customer has older order dates than his/her first registration date in SAP Emarsys?

The registration date of these contacts will be set to the same as the first order date in SI by us. This won't affect the SAP Emarsys side since we don't write back to SAP Emarsys from Smart Insight, so the custom registration date field will remain empty in SAP Emarsys.

What happens if the custom registration date field is newer than the Created date/Date of first registration?

The registration date of these contacts will be the date defined by **Created date**/**Date of first registration**. The custom registration field will not be applied in the last engagement in this case.

What happens if a contact has only click data but any other data of this contact is missing?

The contact was deleted but its click data remained. This contact will appear on the **Lead lifecycle** page, its lifecycle status will depend on the date of click and the lead source will be **Unknown**.

Smart Insight Attributes and Filters

Attributes are filters that you can use to customize your Smart Insight charts. Where available, they are listed to the right of the chart, and are grouped by category.

Smart Insight attributes

The following Smart Insight attributes are available:

- Contact attributes
- Purchase attributes
- Website behavior attributes

Smart Insight filters

The following filters are available in Smart Insight:

- Filters in the Customer Lifecycle Report
- Filters in the Lead Lifecycle Report
- Filters in the Average Order Report
- Filters in the Predictive Affinity Report
- Filters in the Past Purchases Report
- Filters in the Top Products Report
- Filters in the Retention Revenue Impact Report

- Filters in the Channel Revenue Impact Report

Note

- In addition to the default filters, SAP Emarsys can create custom filters on request based on the data you provide via the sales, product file or your contact database. We can only create custom filters if the data is stored in custom fields in your files.
- Adding new filters after Smart Insight was implemented on your account requires a full data reload. Try to figure out which filters do you need at the beginning of the implementation process to avoid reloading your data. Please note that it’s possible to extend your current data structure without a full data reload if you don’t need to apply that change retroactively (i.e. you don't need to reload your historical data). For example, you can add a new field to your purchase data without a full data reload if you will start to upload this data into Smart Insight from the following day.

Filter types

The following filter types are available in Smart Insight:

- Slider
- Search box
- Date range
- Checkbox

Caution

The checkbox filter type is for fields where the number of different values are less than 100.

It is not recommended having more than 10 different values.

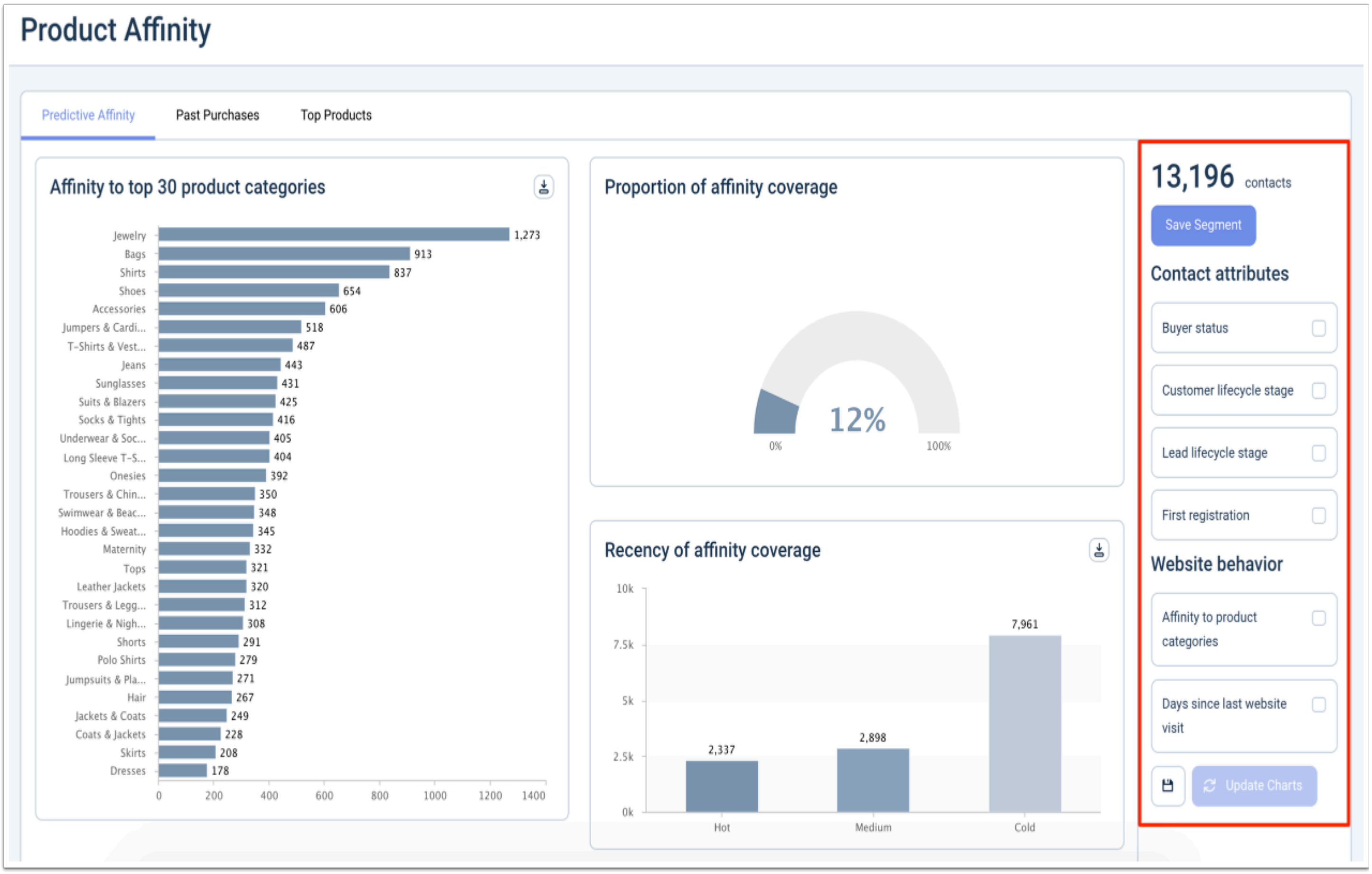
Using attributes to filter charts

Select the customer attributes that you want the charts to reflect and click **Update charts** to refresh the page.

Note

If you select multiple Smart Insight attributes, then they are linked by the **AND** operator.

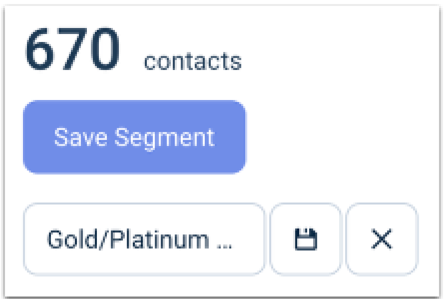
You cannot group attributes with the **OR** operator.



You can see at a glance how many contacts are represented and also quickly save this as a segment.

→ Tip

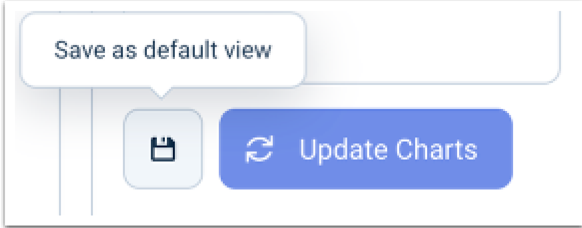
If you would like to create a complex segment by using different Smart Insight charts, then we recommend that you save the different segments and create a combined segment.



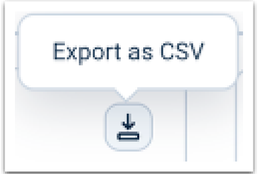
You can use these segments as they are (e.g. as recipient sources for email or SMS campaigns), or combine them with existing segments for more targeted engagement.

SAP Emarsys provides a number of standard attributes by default, but you can also include additional filters during the setup process. Only the relevant attributes are displayed for each chart, and this is also customizable during the setup process.

If you want to save a particular configuration of attributes as your default view, click the **Save** icon at the bottom of the attributes column:



On many tabs, you can also export the data current being displayed by clicking the **export** icon in the top right corner:



→ Tip

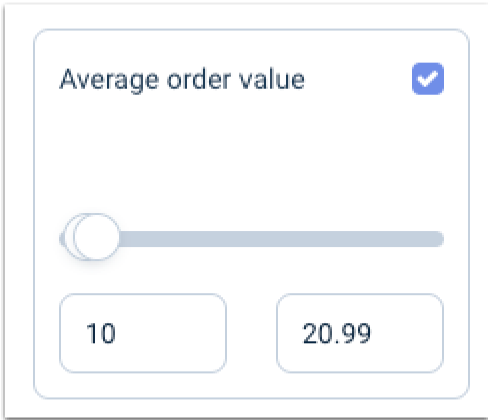
Note that by criteria filtering float type data (numbers with decimal separator) the upper and lower thresholds are considered to be part of the results.

For example:

I want to display all my customers with an **Average order value** between 10 and 20.99 USD.

10 ≦ **Average order value** ≧ 20.99

Use the following setting in **Contacts > Segments:**



Criteria with float type values are for filtering currency values or custom fields holding numeric data with decimal separators:

Default Smart Insight criteria:

- Average Order Value
- Spent in monetary interval
- Total lifetime spend
- Order total
- Price
- Total spent on selection

Custom criteria set during [Smart Insight Onboarding:]

- Weight
- Customer specific grading

Contact Attributes

You can use contact attributes to segment your contacts by their lifecycle status.

i Note

You can use any of your contact fields for filtering, except for multiple choice fields. For more information, see **Fields for filtering** in Resetting the contact fields.

The following contact attributes are available in Smart Insight:

- **Customer lifecycle status** - You can filter contacts based on their Customers by lifecycle stage.
- **Lead lifecycle status** - You can filter contacts based on their Lead Lifecycle Status.
- **Buyer status** - You can filter contacts based on their buyer status.

Or by their engagement and purchase history:

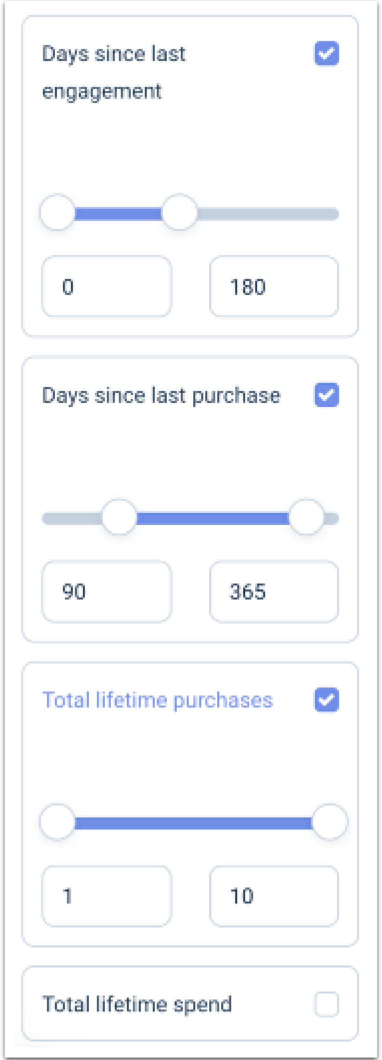
- **Days since last engagement** – You can filter customers based on the number of days that have passed since their last engagement. Engagement is defined as visiting the website, clicking a link in an email or making a purchase.
- **Days since last purchase** – You can filter contacts based on the number of days that have passed since their last purchase. For example, you can filter for contacts who made their last purchase in the last 180 days by setting the time range between 0 (i.e. the current day) and 180 days.

→ Tip

When combined with a **Product category** filter, **Days since last purchase** does not return those who purchased from the defined category during the specified timeframe. Use the **Order(s) made X days ago** filter for such cases. For more information, see Creating contact, email behavior, geolocation and Smart Insight segments.

- **Days since registration** – You can filter contacts based on the number of days that have passed since their registration. For example, you can filter for contacts who registered 30 to 60 days ago.
- **Spent in monetary interval** – You can filter customers based on the amount of money they spent during the Monetary interval set in your Smart Insight settings.
- **Total lifetime purchases** – You can filter customers based on the number of purchases they made during their entire purchase history. For example, you can filter for contacts who have made at least 2 but no more than 5 purchases during their purchase history.
- **Total lifetime spend** – You can filter your customers by the amount of money they spent through their entire purchase history. For example, you can filter those customers who spent a considerable amount of money a few years ago but became low spenders in the last year. You can use this filter to encourage these contacts to make further purchases.
- **Average order value** – You can specify the average order value range and filter your contacts based on that.
- **Generated (missing from Emarsys)** – You can filter out those contacts from your reports who are missing from the SAP Emarsys contact database.
- **Email** – **You can filter contacts based on their email address.**
- **First registration** – You can filter contacts based on their first registration date. All contacts who registered during the selected timeframe will be included in the charts.

You can move the slider or enter numbers in the fields. The range is defined by you during setup.



The difference between the *<X>* Days since last purchase and Order(s) made *<X>* days ago filters

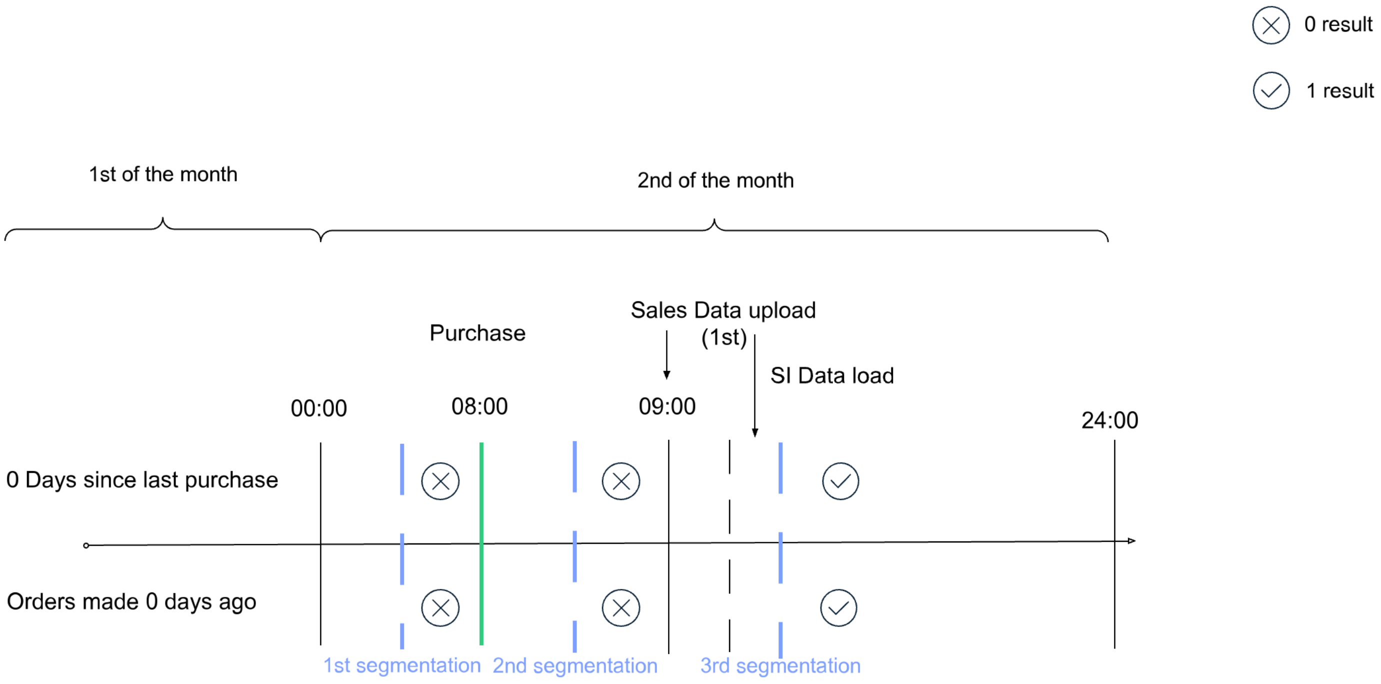
As the filter **Days since last purchase** relies on daily [Smart Insight data uploads](), it counts days differently than those filters which rely on dates (e.g. **Order(s) made X days ago**).

The data behind the filter **Days since last purchase** is calculated only at the daily **[Smart Insight Data Load]()**, thus it remains unchanged until the next Data Load. Although the sales data is uploaded only on a daily basis in the example, the **Order(s) made X days ago** filter is calculated at each segmentation. It does not use saved result as **Days since last purchase**.

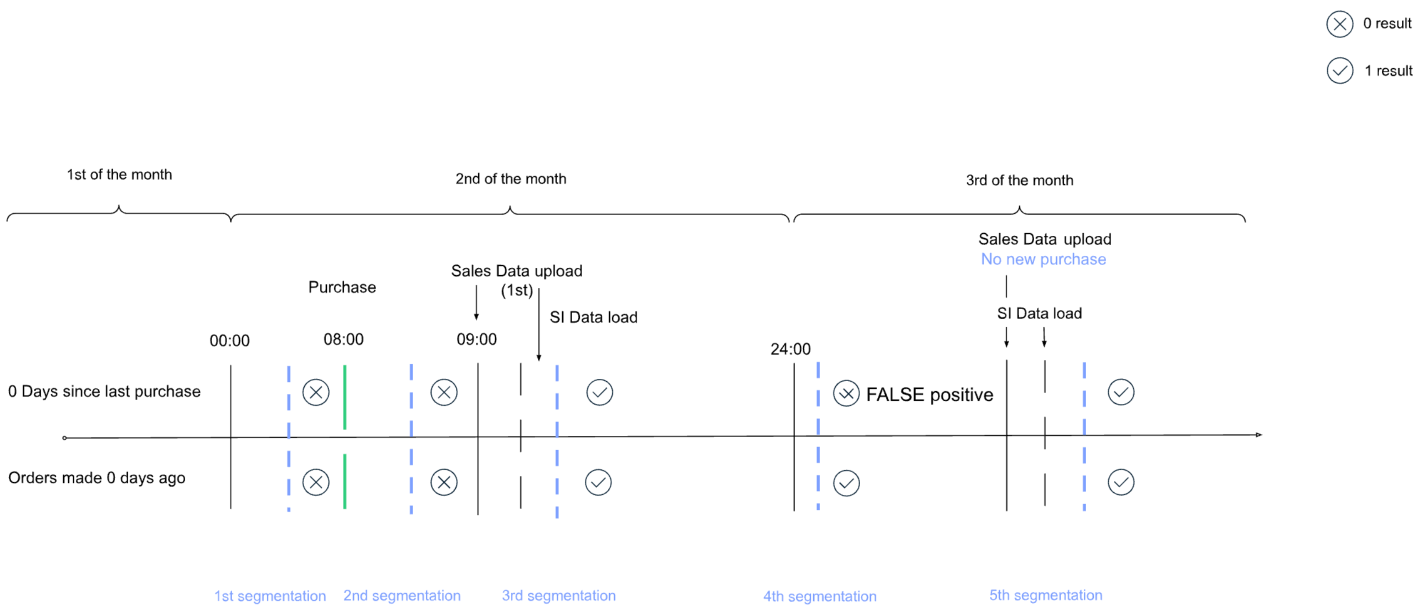
In our illustration, "contact A" made a purchase on the 2nd at 08:00. The daily purchase data uploads are started at 09:00.

Depending on the upload time the following is possible:

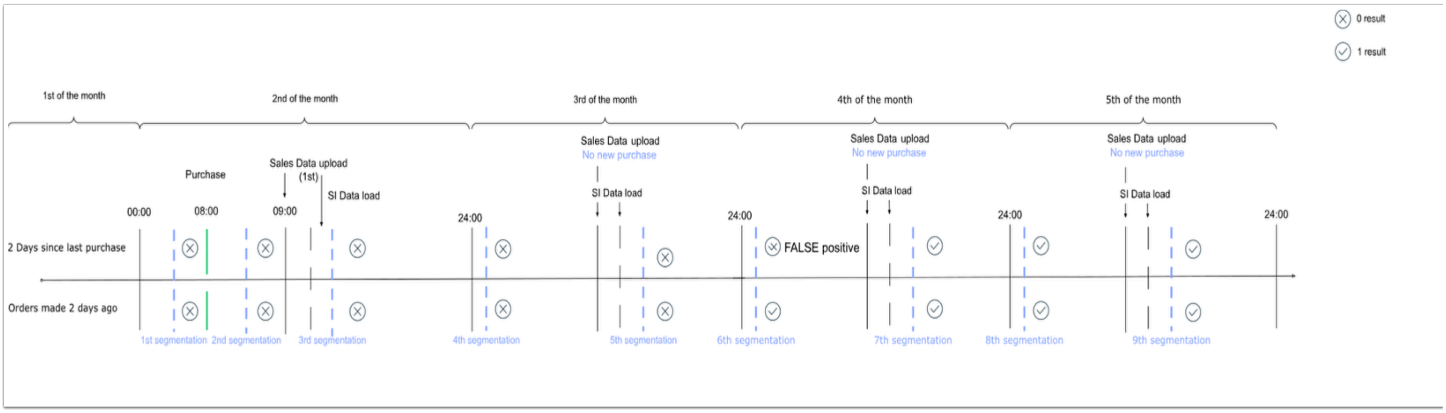
X Days since last purchase	Order(s) made X days ago
0 Days since last purchase: When segmenting, Contact A is not listed until both the sales data upload and the SI data load is completed. However, Contact A continues to be listed as someone with a purchase on the current day until the next SI data load (before 09:00 on the 2nd). This might lead to a false positive result in cases when the segmentation is done before the uploaded is processed at the SI data load.	**Order(s) made 0 days ago**: Contact A is listed only at the 3rd segmentation attempts.



X Days since last purchase	Order(s) made 1 days ago
1 Days since last purchase: Contact A is not listed unless purchase date was already processed at the SI data load. Contact A will be returned at the 5th segmentation only (3rd of the month). However, Contact A would be still returned before the SI data load is processed on the 4th of the month.	**Order(s) made 1 days ago**: Contact A is listed at the 4th and the 5th segmentation attempts.



X Days since last purchase	Order(s) made X days ago
2 Days since last purchase: Following the above pattern, Contact A would be only listed on the 4th of the month after the purchase date is uploaded and processed. However, Contact A is also returned on the 5th of the month before the next SI data load.	**Order(s) made 2 days ago**: Following the above pattern, Contact A would be listed on the 4th of the month already before the sales data is processed (SI data load).



i Note

The uploaded sales data has to be processed by SAP Emarsys. This might take hours by above average amount of data (large amount of purchases, for example, covering multiple days).

→ Tip

Based on the workings of the **Days since last purchase** filter, it is generally recommended to wait for the [Sales Data Upload](#) and the **[Smart Insight Data Load](#)** to be finished especially when filtering for purchase events on the current day.

Manual data uploads can be initiated at any time, but the upload and the **Smart Insight Data Load** must be completed for the calculations to be refreshed.

Purchase Attributes

You can use purchase attributes to segment the Smart Insight charts based on the purchased products.

i Note

You can use any of your product and purchase fields for filtering. For more information, see **Fields for filtering** in [Resetting the data file](#) and [Resetting the purchase fields](#).

The following purchase attributes are available in Smart Insight:

- **Order(s) made X days ago** – You can filter for contacts who made a purchase during the specified time period. This purchase is not necessarily their last purchase.

i Note

This filter excludes purchases without a value (such as gifts). It only consider purchase with a value greater than zero. To include also gift purchases, use the **Date** filter.

- **Order total** – You can filter contacts based on the total value of one of their purchases. If you define a range, then the chart will display only those purchases that are included within the range set. For example, if you set the range between $100 and $250, and a contact has previously bought 4 pairs of socks for $40, then 2 pairs of shoes for $150, and finally, 3 designer shirts for $450, then only the second purchase will be displayed in the charts.
- **Sales amount** – You can filter contacts by the price of the products they have purchased. For example, if a contact has bought a pair of shoes for $75 and a designer leather belt for $250 and you set the range between 50 and 200, then only the first purchase will be displayed in the charts.
- **Date** – You can select a time range and filter for contacts who have made at least one purchase during that period. This filter includes purchase with zero value (gifts) when searching for contacts.
- **Quantity** – You can define a range and filter contacts based on the number of identical items they have bought as part of a single order. For example, if you set the range between 3 and 10 and one of your contacts has made 3 different purchases:

first, the customer bought a jacket, then 3 pairs of the same shoes and finally, 5 T-shirts (of the same kind), then only the last two purchases will be displayed in the charts.

- **Product category** – You can filter contacts based on the category of the product they have purchased.
- **Attribution channel** – The channel responsible for the purchase (currently, email, In-app and Push campaigns).
- **Email campaign category** – Purchases are linked to campaigns in SAP Emarsys. You can filter contacts based on the campaign's category in SAP Emarsys.
- **Email campaign name** – Purchases are linked to campaigns in SAP Emarsys. You can filter contacts based on the campaign's name in SAP Emarsys.

i Note

Please note that you can only use the **Email campaign category** and **Email campaign name** attributes for email campaigns.

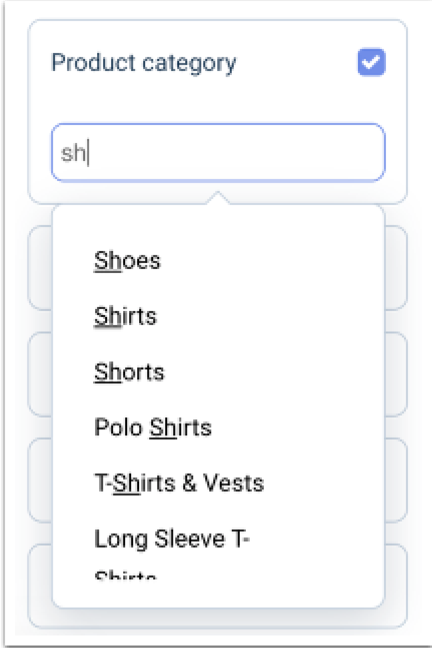
- **Total spent on selection** - You can search for customers who spent the specified amount of money on the selected categories, products or purchases (if you combine it with the **Product category** or purchase attribute filters) with this filter.
- **Purchase number** – This counts orders rather than total items bought. You can filter contacts by determining the exact number of their purchase from a series of purchases. For example, you can filter for contacts who bought red shoes at the time of their **second purchase** by combining this one (set to 2) with the **Title** filter.
- This filter does not count refunded purchases.
- **External id** – If you use an external id to identify your customers, products or stores, then you can filter contacts by this id.
- **Title** – You can filter contacts by the title of the products they have purchased.
- **Item –** You can filter contacts by the identifier that is used to connect products with purchases.

i Note

The following filters are currently on Pilot release for **Retail** clients only. If you are interested in participating in the Pilot phase, please speak to your Success Manager.

- **Sales channel –** You can filter contacts based on the sales channel (i.e. either offline or online) through which they have purchased products.
- **Store id** – You can filter contacts based on the id of the store where they have made purchases.
- **Name** – You can filter contacts based on the name of the store where they have made purchases.
- **Open date** – You can filter contacts who have made purchases in a store based on the date when the shop was opened.
- **Country code** – You can filter contacts based on the country or region code of the store where they have made purchases.
- **City** – You can filter contacts based on the location (city) of the store where they have made purchases.
- **Postal code** – You can filter contacts based on the postal code of the store where they have made purchases.
- **Size** – You can filter contacts based on the floor area of the store where they have made purchases.
- **Category** – You can filter contacts based on the category of the shop where they have made purchases.

Start typing any part of the product or category name and dynamic search will display all possible entries. Multiple entries are possible.



- **Product (wildcard)**

You can also use the **wildcard** characters **^**, **$**, **.*** and **|** in your search. This feature is available on demand from SAP Emarsys Support, and works as follows:

- **^den** – Returns any product name that **starts** with ***den***, such as ***denim***.
- **den$** – Returns any product name that **ends** with ***den***, such as ***garden***.
- **d.*n** – Returns any product name with these a ***d*** and an ***n*** in that order, anywhere, such as ***denim***, ***garden*** or ***donkey***.
- **gar|den|nim** – A pipe can be used for multiple values and returns and product name that contains any of them, such as ***garden***, ***denim*** or ***nimble***.

Website Behavior Attributes

You can use the website behavior attributes to segment the Smart Insight charts based on your contacts' browse patterns.

The following website behavior attributes are available in Smart Insight:

- **Affinity to product categories** - This shows only contacts who have browsed items in defined categories.
- **Days since last website visit** - This helps you refine the chart according to recency.

Filters in the Customer Lifecycle Report

The following filters are available on the [Customer Lifecycle](#) screen:

- **Generated (missing from Emarsys)**
- **Customer lifecycle stage**
- **Buyer status**
- **Total lifetime purchases**
- **Total lifetime spend**
- **Average order value**
- **Days since last purchase**

- Days since last engagement
- Category (from level 1 up to 5)
- Attribution Channel
- Campaign Name
- Campaign Category
- Spent in the last 24 months

Note

The **Spent in the last 24 months** filter is only available if Smart Insight was implemented on your account after May 2016. The filter is also available on request. It is set to 24 months by default.

Filters in the Lead Lifecycle Report

The following filters are available on the Lead Lifecycle screen:

- Lead lifecycle stage
- Days since registration
- Days since last engagement

Filters in the Average Order Report

The following filters are available on the Average Order screen:

- Customer lifecycle stage
- Buyer status
- Total lifetime purchases
- Total lifetime spend
- Days since last purchase
- Days since last engagement
- Order(s) made X days ago
- Attribution Channel
- Campaign Name
- Campaign Category
- Spent in the last 24 months

Note

The **Spent in the last 24 months** filter is only available if Smart Insight was implemented on your account after May 2016. The filter is also available on request. It is set to 24 months by default.

Filters in the Predictive Affinity Report

The following filters are available on the Predictive Affinity screen:

- Customer lifecycle stage
- Buyer status
- Days since last website visit
- Affinity
- Affinity category

Note

The Affinity and Affinity category fields are only available if you are using Predict.

Filters in the Past Purchases Report

The following filters are available on the Past Purchases screen:

- Generated (missing from Emarsys)
- Customer lifecycle stage
- Buyer status
- Order(s) made X days ago
- Products
- Category (from level 1 up to 5)
- Attribution Channel
- Campaign Name
- Campaign Category
- Products Wildcard

Filters in the Top Products Report

The following filters are available on the Top Products screen:

- Customer lifecycle stage
- Buyer status
- Days since registration
- Days since last engagement
- Order(s) made X days ago
- Category (from level 1 up to 5)
- Attribution Channel
- Campaign Name
- Campaign Category
- Products Wildcard

Filters in the Retention Revenue Impact Report

The following filters are available on the Retention Revenue Impact screen:

- Customer lifecycle
- Buyer status
- Total lifetime purchases
- Total lifetime spend
- Products
- Category (from level 1 up to 5)
- Attribution Channel
- Campaign Name
- Campaign Category
- Spent in the last 24 months

i Note

The Spent in the last 24 months filter is only available if Smart Insight was implemented on your account after May 2016. The filter is also available on request. It is set to 24 months by default.

Filters in the Channel Revenue Impact Report

The following filters are available on the Channel Revenue Impact screen:

- Customer lifecycle stage
- Buyer status
- Total lifetime purchases
- Total lifetime spend
- Products
- Category (from level 1 up to 5)
- Attribution Channel
- Campaign Name
- Campaign Category
- Spent in the last 24 months

i Note

The Spent in the last 24 months filter is only available if Smart Insight was implemented on your account after May 2016. The filter is also available on request. It is set to 24 months by default.

Data Sources of Smart Insight filters

You can see the possible data sources of the filters available on the Smart Insight reports here:

Report	Data source of filters
Past Purchase	• contact database • sales_items • products
Customer Lifecycle	• contact database • sales_items • products
Lead Lifecycle	• contact database
Average Order	• contact database • sales_items
Predictive Affinity	• contact database
Top Products	• contact database • sales_items • products
Retention Revenue Impact	• contact database • sales_items • products
Channel Revenue Impact	• contact database • sales_items • products

Smart Insight Screens

The **Smart Insight** menu has four options, leading to the different reporting screens.

Customer Lifecycle

These pages give you an oversight of the status of the contacts in your database according to the lifecycle stages you defined during setup. These are based on eRFM scoring parameters, and categorize your contacts as one of:

Leads / First-time Buyers / Active Customers / Defecting Customers / Inactive Customers

The **Customer Lifecycle** tabs provide the following reports:

- The Dashboard - Provides a real-time summary of the success of your conversion strategies for each lifecycle stage, as well as drill-downs to the exact figures over the last 30 days.
- The Customer Lifecycle screen - Provides a side-by-side comparison of the different customer lifecycle stages and the buyer statuses, by total numbers of contacts, total spend and average spend.
- The Lead Lifecycle screen - Provides a similar side-by-side comparison, but this time of leads only, by lead status and by source.

- The Average Order screen - Shows the average size of orders over time, broken down by lifecycle stage, and also lists the most commonly bought categories when contacts converted from one stage to another.

Product Affinity

These pages list your products and categories according to the number of contacts who have bought them, or who are likely to buy them in the future.

The **Product Affinity** tabs provide the following reports:

- The Predictive Affinity screen - SAP Emarsys uses scoring algorithms and machine learning to predict which categories a contact is most likely to buy from next. The top 30 categories are listed here by popularity.
- The Past Purchase screen - This simply lists the most popular products and categories according to the number of contacts who bought them (not the number of items or total revenue).
- The Top Products screen - This plots the most popular products and categories on scatter graphs, so you can compare their distribution according to how much revenue they generated, or how many contacts they converted from one lifecycle stage to another.

Impact

This page has two tabs where you can see your total revenue broken down over time according to various criteria:

- Retention revenue impact - Compares your revenue across your different customer lifecycle stages.
- Channel revenue impact - Compares your revenue between email and other channels.

Data Quality

Here you can see the settings specific to your Smart Insight setup and the parameters of your lifecycle stages.

The **Data Quality** page provides the following reports:

- The Overview tab - This lists your lifecycle stages and their parameters, and shows you have many customers and leads you have in your database.
- Data Load History - This lists the daily updates of **Contact**, **Purchase** and **Product** data, and highlights any unsuccessful uploads.

Settings

You can check your Smart Insight configuration on the **Settings** page.

The following tabs are available on the **Settings** page:

- eRFM Parameters - Your eRFM parameter settings that are used by Smart Insight for customer lifecycle categorization are listed on this tab.
- Contact Fields - Your contact field settings are listed on this tab.
- Product Fields - Your product field settings are listed on this tab.
- Purchase Fields - Your purchase field settings are listed on this tab.
- FTP Account - Your **Server address** and **Username** that are used to log into our secure FTP server and upload your data files are listed on this tab.
- Advanced - Your **Automatic Daily Load** and **Primary Category Level** settings are listed on this tab.

The Customer Lifecycle Dashboard

The **Customer Lifecycle Dashboard** provides a brief overview of how the conversion strategies for all your customer lifecycle stages are performing. Each lifecycle stage is shown in turn with a set of standard metrics and drill-downs to more detailed reporting and Smart Metrics.

Important Notes

Before you start, you should read the following notes.

⚠ Caution

Please note that when a contact is deleted, all of the data relating to that contact is also deleted. This will retrospectively affect any reports which use contact-level data. Contact deletion may affect the Customer Lifecycle Dashboard and all the Smart Insight reporting screens, including the Customer Lifecycle, Product Affinity and Impact pages. You may experience the following changes:

- figures may change in all charts because contact deletion affects all calculations.
- deleting contacts also affect conversion rates, the AOV (Average Order Value) and lifecycle calculations.

For more information on the effects of contact deletion, see What happens to deleted contacts in SAP Emarsys?

i Note

The criteria of the lifecycle stages and the timeframe for the conversion rate are customizable during Smart Insight setup. For more information on the definitions of these categories and how the conversion rates are calculated, please see the Customer Lifecycle Terminology section of the **Implementing Smart Insight** page.

i Note

- Most of the metrics on this page and the associated drill-down pages are concerned with ***conversion***, and focus on the value of the orders at the moment of conversion. To see which metrics take refunds into account, see Refunds in the Smart Insight reports and calculations.
- **Historical spend** figures are calculated over longer periods and refunded purchases are deducted from these totals.

Available metrics and reports

The following metrics and reports are available on the **Customer Lifecycle Dashboard**:

- Standard Metrics
- Detailed Reporting Drill-downs
- Smart Metrics Drill-downs
- Customer Lifecycle Report
- Lead Lifecycle Report
- Average Order Report
- RFM Advisor

Related Information

Excluding Unidentified Purchases from Your Reports

Dashboard Notifications

Standard Metrics

You can find the description of the standard metrics of the Customer Lifecycle Dashboard on this page.

The first set of standard metrics show:

- The total number of contacts currently in the lifecycle stage.

  i Note

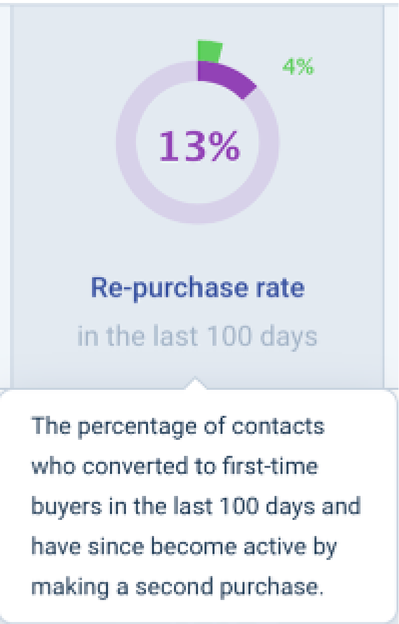
  Inactive leads are excluded from the Leads section because this number can grow to be very large and render all other metrics statistically meaningless. They are included in the Lead Lifecycle reporting.

- The average recent conversion rate (click to drill down).

  This varies from stage to stage so each one has a helpful tooltip explaining exactly what the conversion means for that stage.

- The contribution that can be attributed to Emarsys campaigns.

  This is shown as an extra metric in this section, in green.

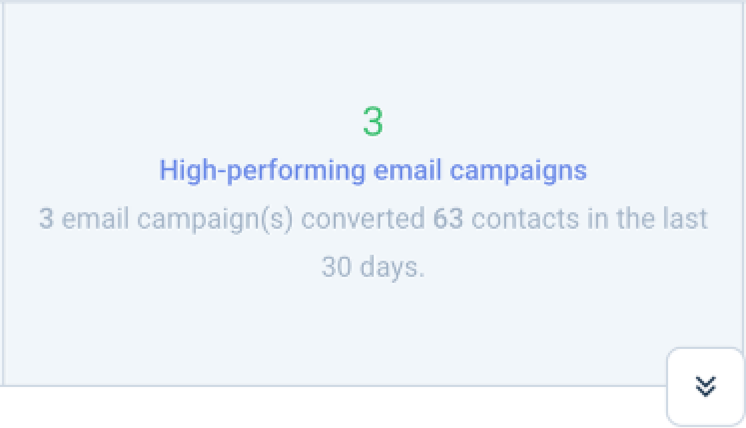


- The number of contacts entering and leaving the stage over the last 30 days.

  The figures for yesterday are also included; hover your mouse over the graphs to see the figures for any of the other days.

- **The high-performing campaigns** (click to drill down).

  This lists the number of campaigns which each contributed to more than 1% of conversions, with the total number of contacts converted.



Detailed Reporting Drill-downs

You can find the description of the detailed reporting drill-downs of the Customer Lifecycle Dashboard on this page.

Clicking the **Conversion rate** or **high-performing campaigns** metrics will open the detailed reporting page for that lifecycle stage.

The data for each of these reports can be exported in `.csv` format via the icon in the upper right corner:

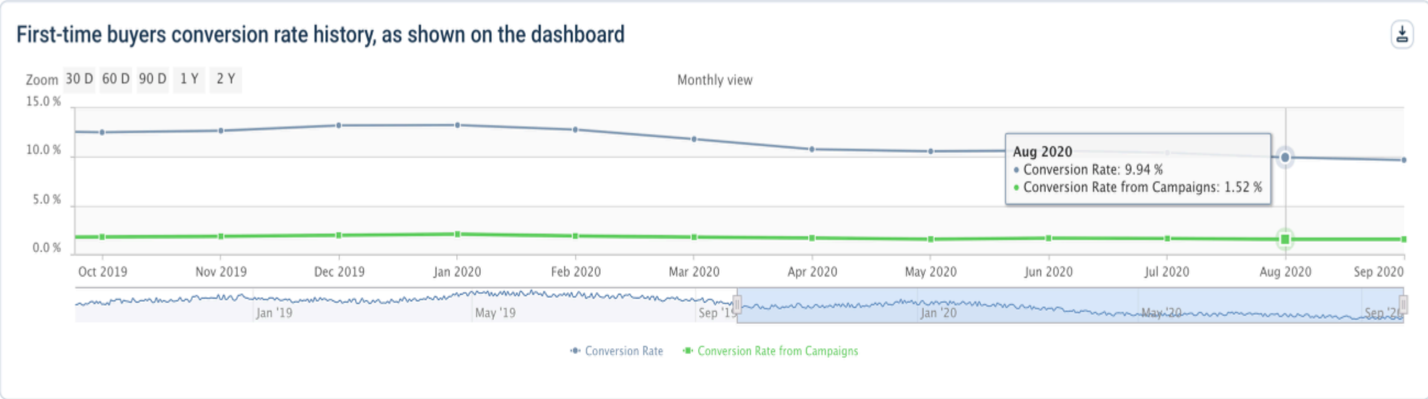
- **Conversion rate**

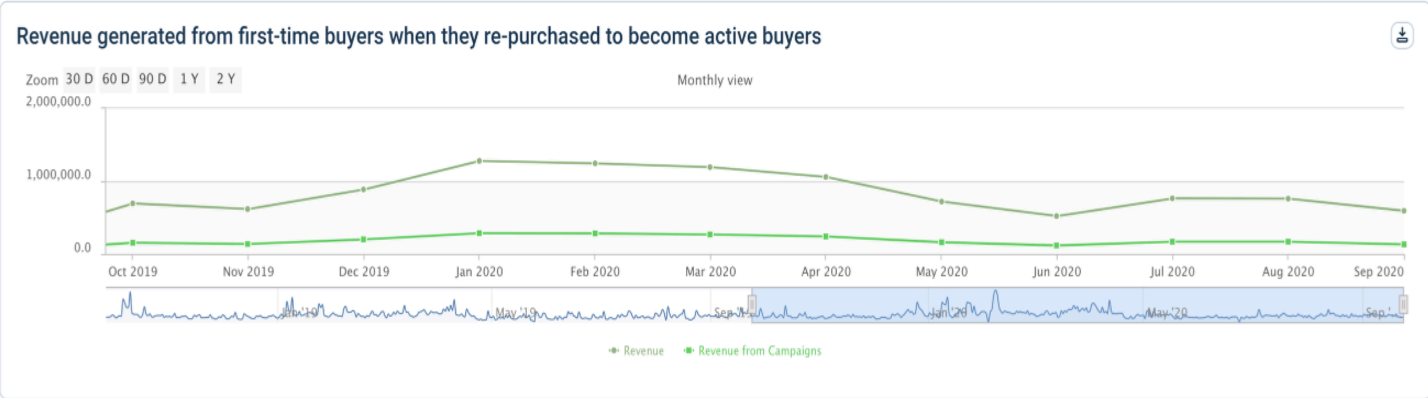
  The first graph shows the conversion rate over time for this lifecycle stage. Conversions that can be attributed to SAP Emarsys campaigns are shown in green.

- **Revenue generated**

  The second graph shows the revenue from the conversions in this lifecycle stage. Revenue that can be attributed to SAP Emarsys campaigns is shown in green.

Both of these can be customized to show data from the past month to the past two years, either by clicking the **Zoom** links or moving the slider below.





- **High-performing campaigns**

  If any campaigns contributed to more than 1% of conversions in the last 30 days, they are listed here with the number of orders and total revenue.

High-performing email campaigns by first-time buyers

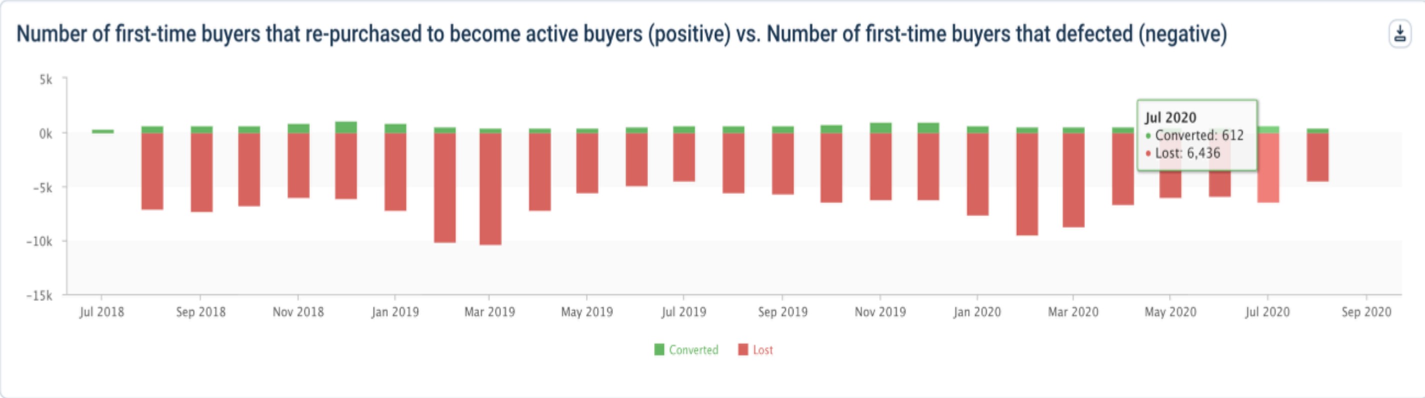
Email campaign name	Number of orders	Revenue
make another purchase with us	40	2,890 EUR
Did you miss it?	16	785 EUR
Monthly newsletter	7	512 EUR

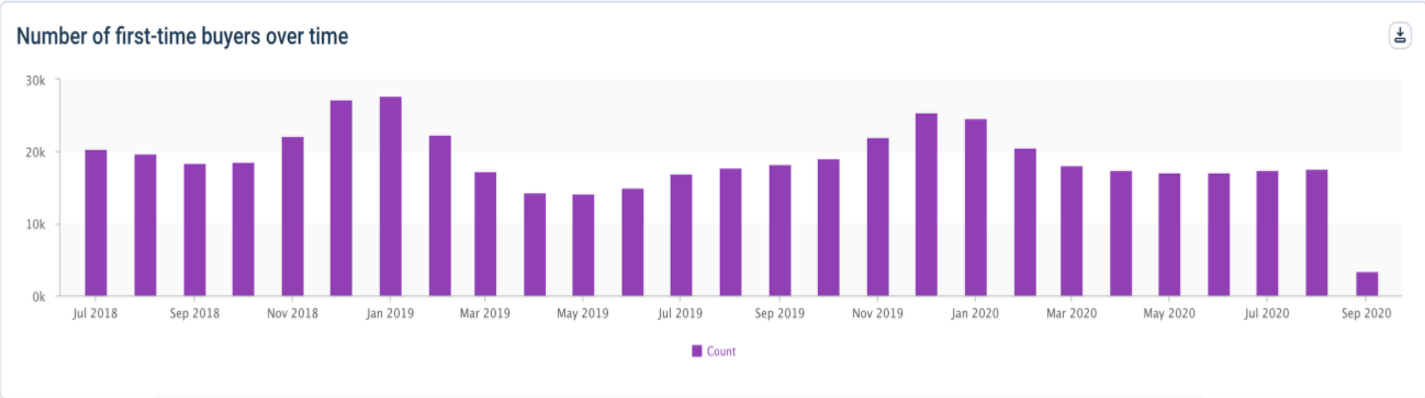
- **Contacts converted vs. lost**

  The fourth graph compares the number contacts converted to a more valuable lifecycle stage against those lost to a less valuable one, month by month over the past two years.

- **Total number of contacts over time**

  The final graph shows the total number of contacts in the lifecycle stage, month by month over the past two years.





Smart Metrics Drill-downs

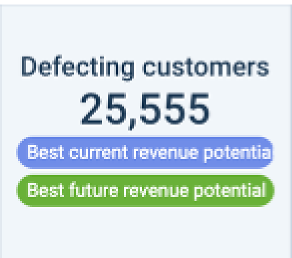
You can find the description of the Smart Metrics of the Customer Lifecycle Dashboard on this page.

Click the down-arrows on the right of each section to expand it and show a secondary set of Smart Metrics.

Smart Metrics provide real figures that show the effect of the conversion strategy you are using for that stage, and predictive figures that allow you to compare and evaluate your strategies and decide where your lifecycle marketing budget and activities can most profitably be directed. For a full breakdown of the Smart Metrics available for all lifecycle stages, and how they are calculated, click here.

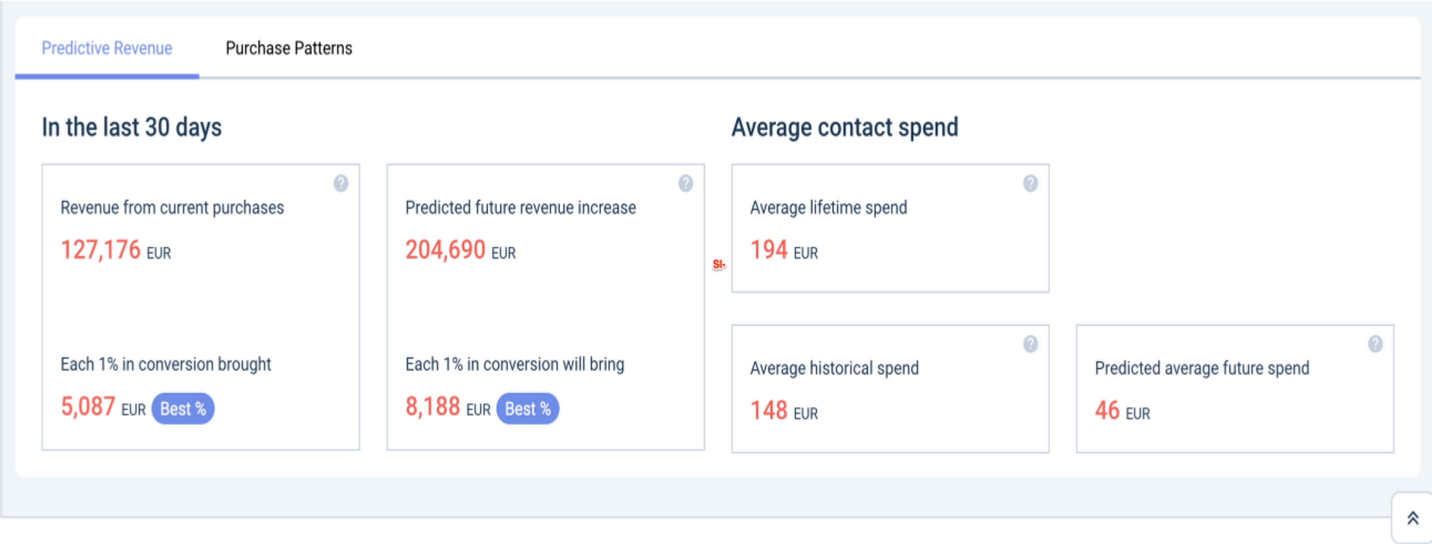
- **Most successful lifecycle stage**

  The lifecycle stage with most successful strategy for current and for future potential is clearly marked:



- **Predictive Revenue**

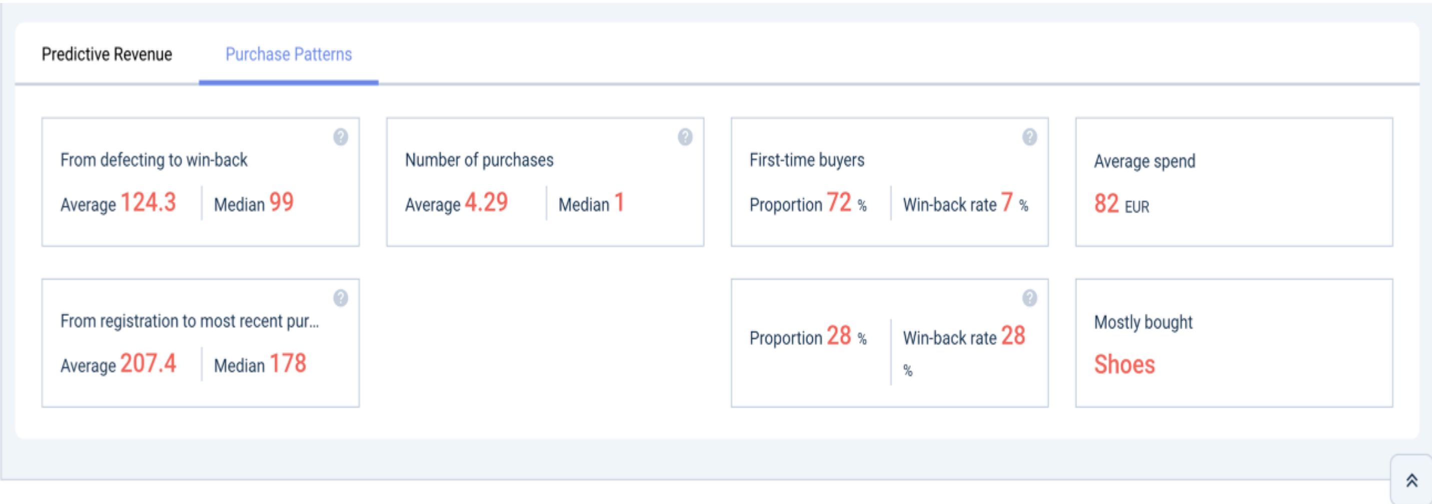
  On this tab, Smart Insight shows the real revenue and conversion figures for this stage, and uses these to provide future revenue predictions. These show you how much each converted contact is potentially worth and what you can expect to earn from this lifecycle stage if your strategy remains unchanged.



- **Purchase Patterns**

  On this tab, Smart Insight shows the average and median (mid-ranking) values for a number of metrics, depending on the lifecycle stage. For example, in the image below for **Defecting Customers**, you see the number of days it takes for contacts to convert, and the total lifetime of defecting customers. It also shows the respective conversion rates for contacts according to the lifecycle stage they were in when they became 'defecting'.

  The **average spend** and **mostly bought** product category in the purchases that led to successful conversions over the last 30 days are also shown.



Excluding Unidentified Purchases from Your Reports

i Note

This feature is currently on Pilot release for **Retail** clients only. If you are interested in participating in the Pilot phase, please speak to your Success Manager.

You can filter out purchases made by unidentified contacts from the calculations behind the Strategic Dashboard and Smart Insight reports. In general, the major part of offline purchase statistics is attributed to unidentified customers which could distort your reports. We recommend using this feature if you would like to improve your reports by removing such purchases.

To turn this feature on, follow the instructions next to **Unidentified purchases** in section General Settings.

i Note

- The changes will apply retroactively and take effect after the next daily load.
- If you activate this feature, purchases made by non-identified contacts will be removed from all your lifecycle-related statistics. However, your reports will not show explicitly how many contacts were excluded from your statistics except for the Retention Revenue Impact reports.

Dashboard Notifications

You can find an explanation of the messages you might receive from the **Customer Lifecycle Dashboard**.

Outdated purchase data

This message is shown when no purchases have been loaded for the last 3 days.

ERFM scoring is not yet set up

Your orders are not old enough. If the oldest order is within the inactive recency limit (e.g. if the limit is 365 days and 200 days is the oldest order), we cannot not yet set up the parameters as requested.

Missing order data

- You don’t have any order data; please start uploading it.
- You do not have a sales file uploaded.

Inconsistent order data

- The items in your orders have order IDs; please check that the order IDs in your files are consistent and do not refer to items but orders.
- If items are sent with order IDs, it can occur that a contact becomes active right before the lead status and leaves out first-time buyer status resulting in distorted information about first-timers and active buyers.

Inconsistent conversion rates

- Some of your potential customers are categorized as defecting or inactive; your ERFM parameters need to be updated.
- When the defecting or inactive conversion rate is higher than the first timer or active one. Defecting or inactive recency limit must be reviewed.

Customer Lifecycle Report

The **Customer Lifecycle** tab gives you a detailed breakdown of the current state of all your customer lifecycle stages.

→ **Tip**

As a quick reminder, here is the onboarding video about **Customer Lifecycle**:

Disclaimer: The below video is not part of the SAP product documentation. Please read the legal disclaimer for video links before viewing this video.

Onboarding video - Smart Insight (2/3) Lead Lifecycle and Product Affinity

01:26

SAP Emarsys

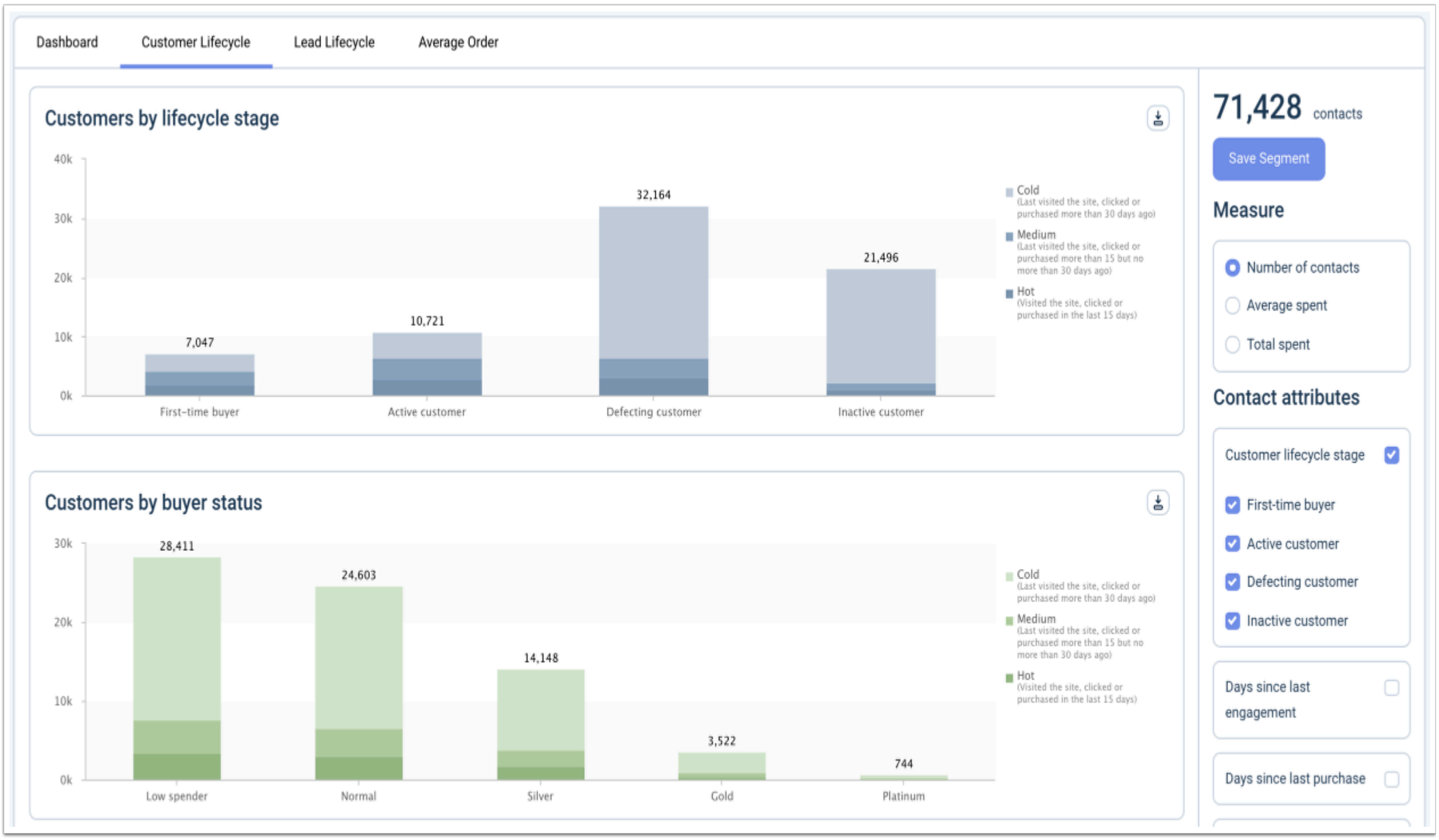
The two graphs split the customers up by lifecycle stage and by buyer status.

⚠ Caution

Please note that when a contact is deleted, all of the data relating to that contact is also deleted. This will retrospectively affect any reports which use contact-level data. Contact deletion may affect the reports available under **Analytics** > **Customer Lifecycle**. You may experience the following changes:

- figures may change in all charts because contact deletion affects all calculations.
- deleting contacts also affect conversion rates, the AOV (Average Order Value) and lifecycle calculations.

For more information on the effects of contact deletion, see What happens to deleted contacts in SAP Emarsys?



→ Tip

For more information on how to create a segment using this report or how to update the chart, see Smart Insight Attributes.

Customers by lifecycle stage

Customers are categorized per stage as follows:

i Note

Lifecycle stages are defined during the setup process. The numbers below are just for example, and can be defined during setup. For more information, see Modifying your Smart Insight settings.

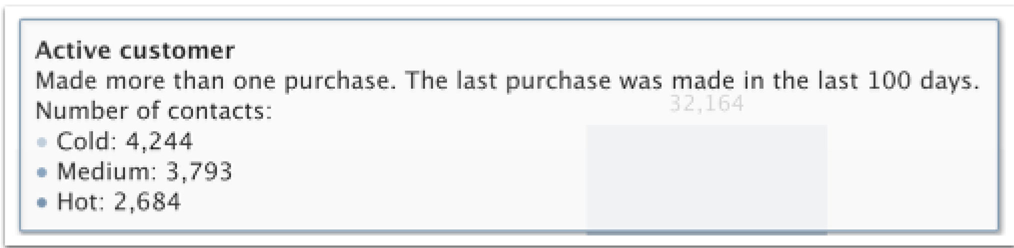
- **First-time buyer** - Made only one purchase, and it was made in the last 90 days.
- **Active buyer** - Made more than one purchase. The last purchase was made in the last 90 days.
- **Defecting buyer** - Has purchased before, and the last purchase was made more than 90, but less than or equal to 365 days ago.
- **Inactive buyer** - Has purchased before, but has not made a purchase for more than 365 days.

i Note

Purchases made on the current day (i.e. when the Automatic daily load is processed) do not affect the lifecycle calculations. Those purchases are processed the following day after the next scheduled data load.

For example, if an inactive contact made a purchase on 1 April at 18:00 and your data load is processed at 20:00, then the contact's customer lifecycle stage will only change to active customer on 2 April after 20:00 (i.e. after the next scheduled automatic data load).

In addition to this, each column is sorted by recency; the darker the shade, the more recent the engagement (and the more valuable the customers). Hover the mouse over each one to see the exact definition.



Customers by buyer status

The **Buyer Status** chart categorizes customers based on their spending levels using their historical data (The exact limits for each threshold are also defined during setup. For more information, see Modifying your Smart Insight settings.).

- **Low spender** - E.g. up to €50.
- **Normal** - E.g. up to €200.
- **Silver** - E.g. up to €500.
- **Gold** - E.g. up to €1000.
- **Platinum** - E.g. more than €1,000.

⚠ Caution

The lowest buyer should not have a value entered, so very low spender and those without spending can be still categorized. Entering values for each buyer status will prevent the correct setup of Smart Insight.

Filtering the charts

As well as using the standard set of Smart Insight attributes to filter the charts by contact or purchase criteria, you can also use the **Measure** section to define which metric the charts display. The choices are:

- The total **number of contacts** currently in each stage.
- The **average spent** by the contacts currently in each stage.
- The **total spent** by all the contacts currently in each stage.

Select whichever reporting you want and then click **Update Charts**.

Lead Lifecycle Report

The **Lead Lifecycle** tab gives you a detailed breakdown of the current state of all your lead lifecycle stages.

→ Tip

As a quick reminder, here is the onboarding video about the **Lead Lifecycle** page:

Disclaimer: The below video is not part of the SAP product documentation. Please read the legal disclaimer for video links before viewing this video.

Onboarding video - Smart Insight (2/3) Lead Lifecycle and Product Affinity

02:49

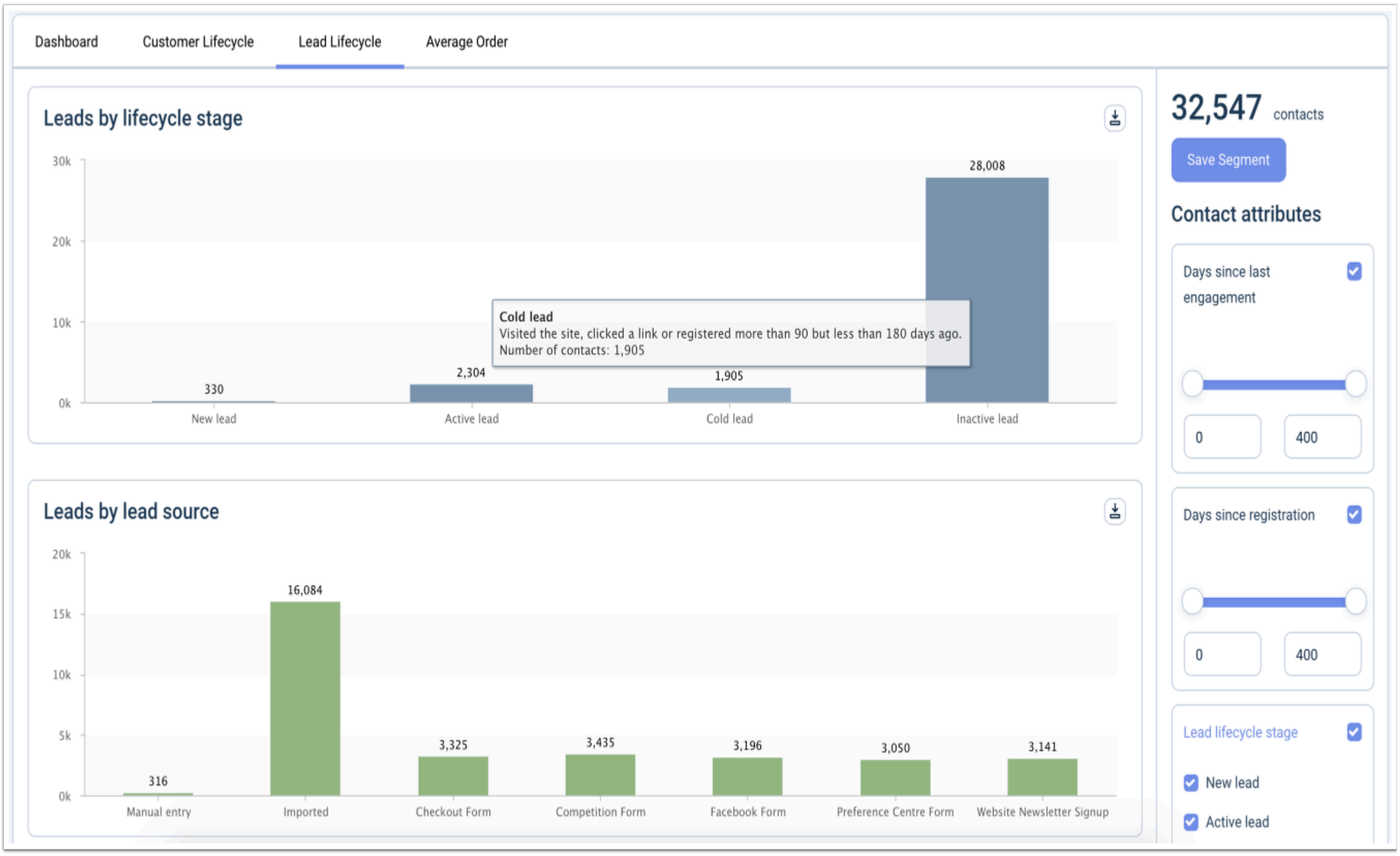
The two graphs split the leads up by lifecycle stage and by source (i.e. how they entered your database).

⚠ Caution

Please note that when a contact is deleted, all of the data relating to that contact is also deleted. This will retrospectively affect any reports which use contact-level data. Contact deletion may affect the reports available under **Analytics** > **Customer Lifecycle**. You may experience the following changes:

- figures may change in all charts because contact deletion affects all calculations.
- deleting contacts also affect conversion rates, the AOV (Average Order Value) and lifecycle calculations.

For more information on the effects of contact deletion, see What happens to deleted contacts in SAP Emarsys?



→ Tip

For more information on how to create a segment using this report or how to update the chart, see Smart Insight Attributes.

Lead Lifecycle Status

Leads are categorized as contacts who have not yet made a purchase. Within this they are split up as follows (The exact parameters are defined during the setup process. For more information, see Modifying your Smart Insight settings.):

- **New Lead** - Registration was within the last 90 days, no response yet (beyond opt-in).
- **Active Lead** - At least one response in the last 90 days.
- **Cold Lead** - No response for more than 90 days.
- **Inactive Lead** - No response for more than 180 days.

⚠ Caution

Leads who purchase on the very first day of their registration do not count as leads (these contacts are not displayed in the conversion rate or any graphs as leads). Instead, they are counted directly as **First-time buyers**.

Lead Source

Any forms through which leads have registered are shown here. If you have too many forms to show on this graph, it can be customized during the setup process.

Average Order Report

The **Average Order** tab shows the average total value of orders over the past two years, broken down by customer lifecycle stage.

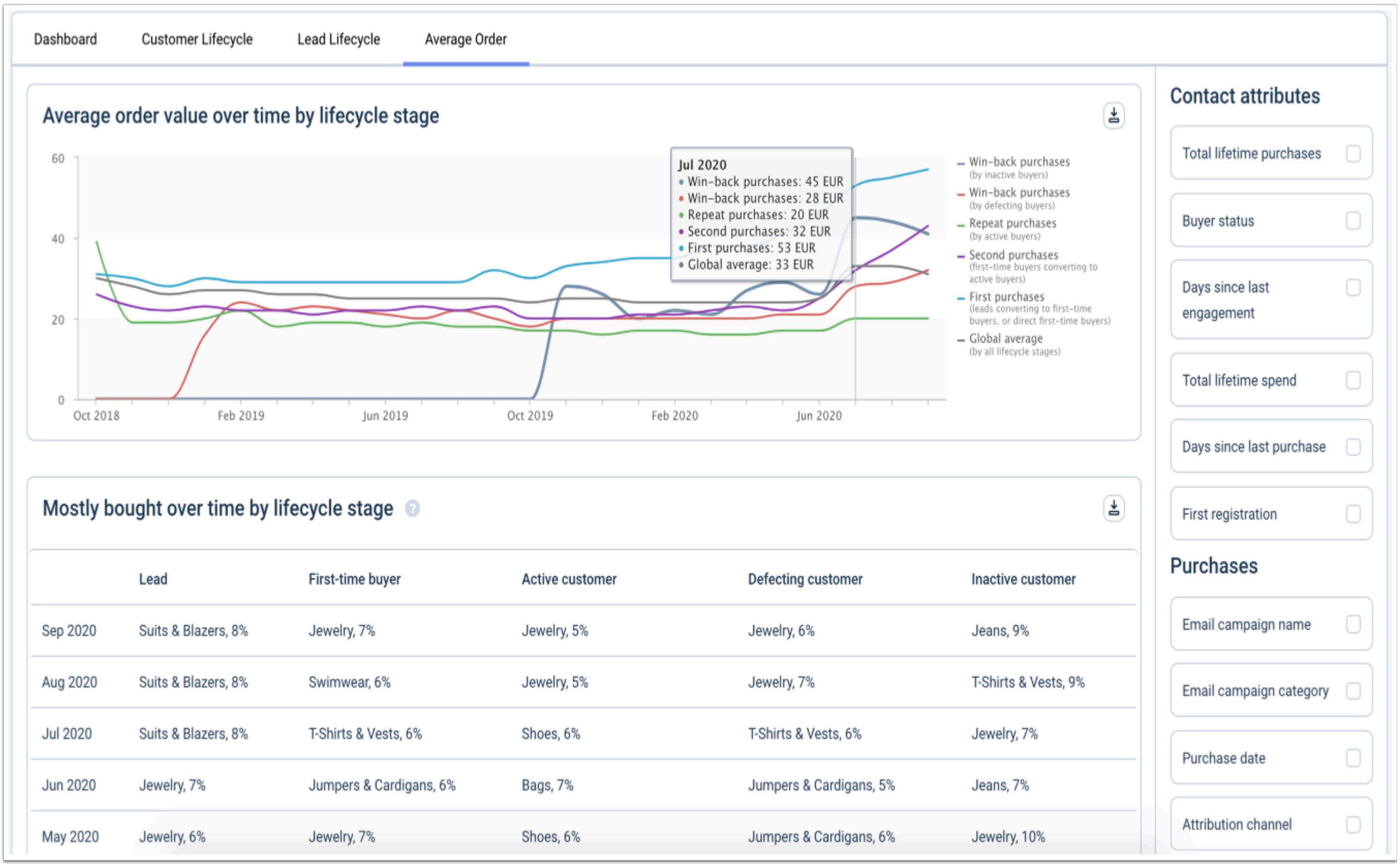
In the table below the graph, the best-selling product category for each month is listed per lifecycle stage. In this way you can track purchase trends within your customer database.

⚠ Caution

Please note that when a contact is deleted, all of the data relating to that contact is also deleted. This will retrospectively affect any reports which use contact-level data. Contact deletion may affect the reports available under **Analytics** > **Customer Lifecycle**. You may experience the following changes:

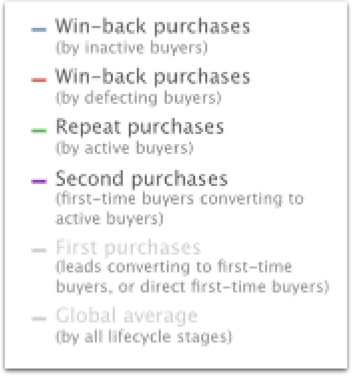
- figures may change in all charts because contact deletion affects all calculations.
- deleting contacts also affect conversion rates, the AOV (Average Order Value) and lifecycle calculations.

For more information on the effects of contact deletion, see [What happens to deleted contacts in SAP Emarsys?]



	Lead	First-time buyer	Active customer	Defecting customer	Inactive customer
Sep 2020	Suits & Blazers, 8%	Jewelry, 7%	Jewelry, 5%	Jewelry, 6%	Jeans, 9%
Aug 2020	Suits & Blazers, 8%	Swimwear, 6%	Jewelry, 5%	Jewelry, 7%	T-Shirts & Vests, 9%
Jul 2020	Suits & Blazers, 8%	T-Shirts & Vests, 6%	Shoes, 6%	T-Shirts & Vests, 6%	Jewelry, 7%
Jun 2020	Jewelry, 7%	Jumpers & Cardigans, 6%	Bags, 7%	Jumpers & Cardigans, 5%	Jeans, 7%
May 2020	Jewelry, 6%	Jewelry, 7%	Shoes, 6%	Jumpers & Cardigans, 6%	Jewelry, 10%

Click the purchase type to the right of the graph to add or remove that purchase type from the graph. The displayed purchase types are shown in **bold**:



You can filter the graph further by using the **Contact attributes** to define which kind of contacts you want to analyze, for example only show the current ***Gold*** and ***Platinum*** buyers, or only those who have spent over €500 in their lifetime.

→ **Tip**

For more information on how to update the chart, see Smart Insight Attributes.

RFM Advisor

The **RFM Advisor** page helps you keep your RFM parameters up-to-date and effective.

You can find the **RFM Advisor** under **Analytics** > **Customer Lifecycle** > **RFM Advisor**.

Introduction

The eRFM parameters are used to create the right lifecycle segments for your business model. RFM Advisor helps you calculate the key thresholds and parameters that are needed for lifecycle analysis. Smart Insight will analyze and segment your customers based on the lifecycle stages and their purchase behavior. By using RFM Advisor, your lifecycle segments will be more precise and your analytics will be more accurate.

You can set up the initial parameters for lifecycle analytics and segments and regularly review and update these settings by using RFM Advisor.

⚠ **Caution**

Please note that when a contact is deleted, all of the data relating to that contact is also deleted. This will retrospectively affect any reports which use contact-level data. Contact deletion may affect the reports available under **Analytics** > **Customer Lifecycle**. You may experience the following changes:

- figures may change in all charts because contact deletion affects all calculations.
- deleting contacts also affect conversion rates, the AOV (Average Order Value) and lifecycle calculations.

For more information on the effects of contact deletion, see What happens to deleted contacts in SAP Emarsys?

i **Note**

- The calculation runs during the next data upload.
- The **RFM Advisor** analyzes data collected during the last two years.

Prerequisites

You can access the **RFM Advisor** page if Smart Insight is activated on your account.

Analysis Widgets

The following analytics are available on the **RFM Advisor** screen:

- Recency Analysis
- Monetary Analysis

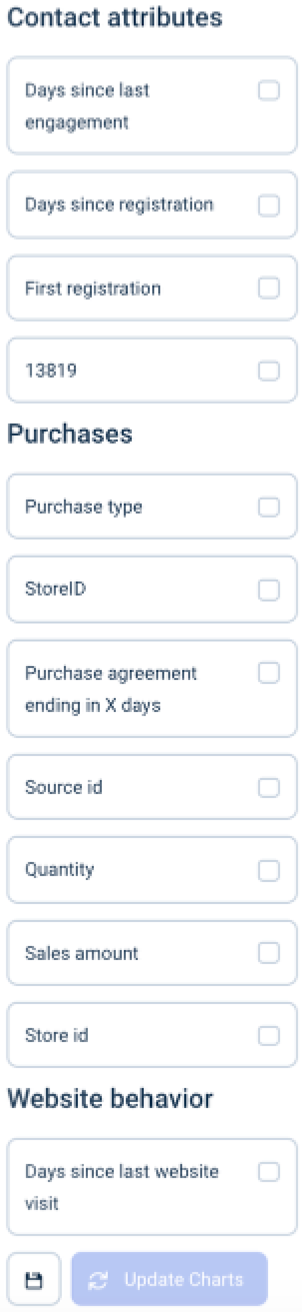
Filtering the charts

You can use the Smart Insight attributes to filter the charts by contact, purchase and website behavior criteria.

i Note

Notes:

- The Purchase date filter is not available on the RFM Advisor page.
- For more information, see sections Contact attributes, Purchase attributes and Website behavior attributes.



Recency Analysis

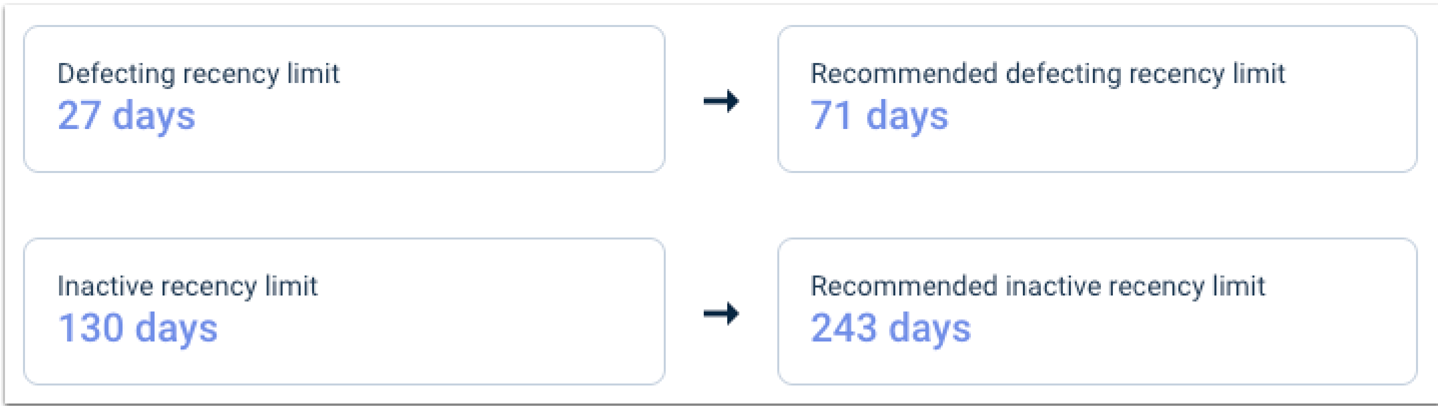
The purchase recency analysis groups your purchases by the time between two purchases made by the same customer. After processing that data, **RFM Advisor** calculates the recommended values for the **Defecting recency limit** and **Inactive recency limit**.

Here you can see the following metrics:

- **Distribution of purchases by time passed until next purchase** - Your purchases are grouped by the time that has passed between two purchases made by the same customer in this chart.

→ Tip

For detailed metrics, hover your mouse over the chart.



- **Defecting recency limit** - The number of days after which customers who have not made new purchases are considered defecting.
- **Recommended defecting recency limit** - The recommended value for the **Defecting recency limit**.
- **Inactive recency limit** - The number of days after which customers who have not made new purchases are considered inactive.
- **Recommended inactive recency limit** - The recommended value for the **Inactive recency limit**.

To accept the values recommended by **RFM Advisor**, click the **Accept recommended values** button.

i Note

Only users with [BI Administrator](#) permissions can make these changes.

Monetary Analysis

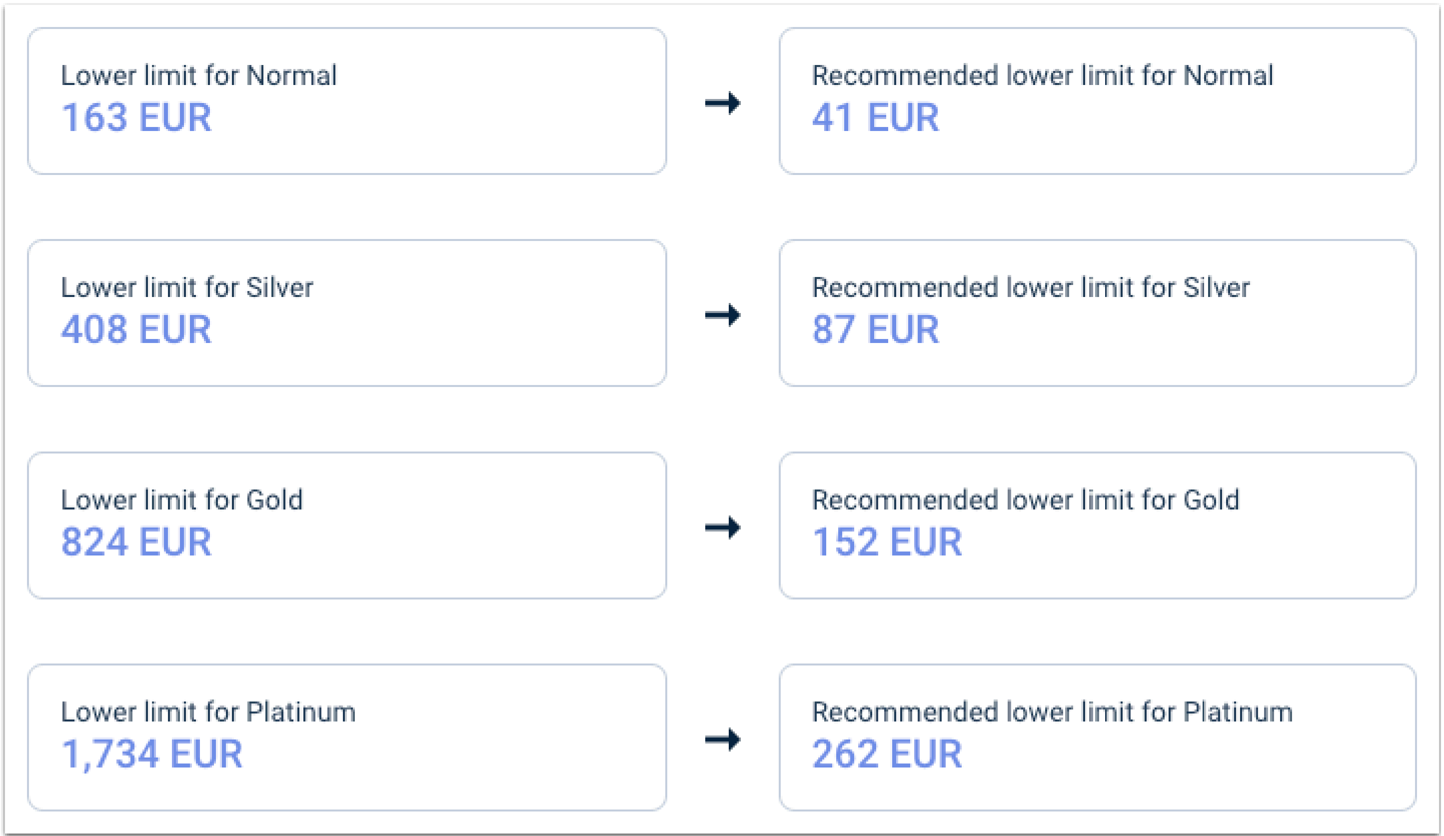
The monetary analysis of purchases groups your customers by their total lifetime spend. Based on this, RFM Advisor calculates the recommended values for your current buyer status limits.

Here you can see the following metrics:

- Distribution of customers by total amount spent - Your customers are grouped by their total lifetime spend in this chart.

→ Tip

For detailed metrics, hover your mouse over the chart.



- The current lower limits of each buyer status.
- The recommended values for the lower limits of each buyer status.

To accept the values recommended by **RFM Advisor**, click the **Accept recommended values** button.

Note

Only users with BI Administrator permissions can make these changes.

Product Affinity

The following reports are available on the **Product Affinity** page:

- Predictive Affinity Report

  The **Predictive Affinity** tab shows you which customers have been identified as having an affinity for a certain product category.
- Past Purchases Report

  The **Past Purchase** tab shows the most popular products and categories over the selected time period (the default is the past two years), as well as the contacts who purchased them.
- Top Products Report

  Top products are calculated from the combined content of your product and sales data files.

Predictive Affinity Report

The **Predictive Affinity** tab shows you which customers have been identified as having an affinity for a certain product category.

Predictive affinity is calculated by Predict. This affinity is based on an analysis of browse and purchase behavior from your entire customer base, combined with scoring algorithms for each individual contact.

Tip

As a quick reminder, here is the onboarding video about **Product Affinity:**

Disclaimer: The below video is not part of the SAP product documentation. Please read the legal disclaimer for video links before viewing this video.

Onboarding video - Smart Insight (2/3) Lead Lifecycle and Product Affinity

03:47

These categories are considered likely to feature in the next purchase made by these contacts, and can help you to create micro-segments and engage them with targeted incentives.

Caution

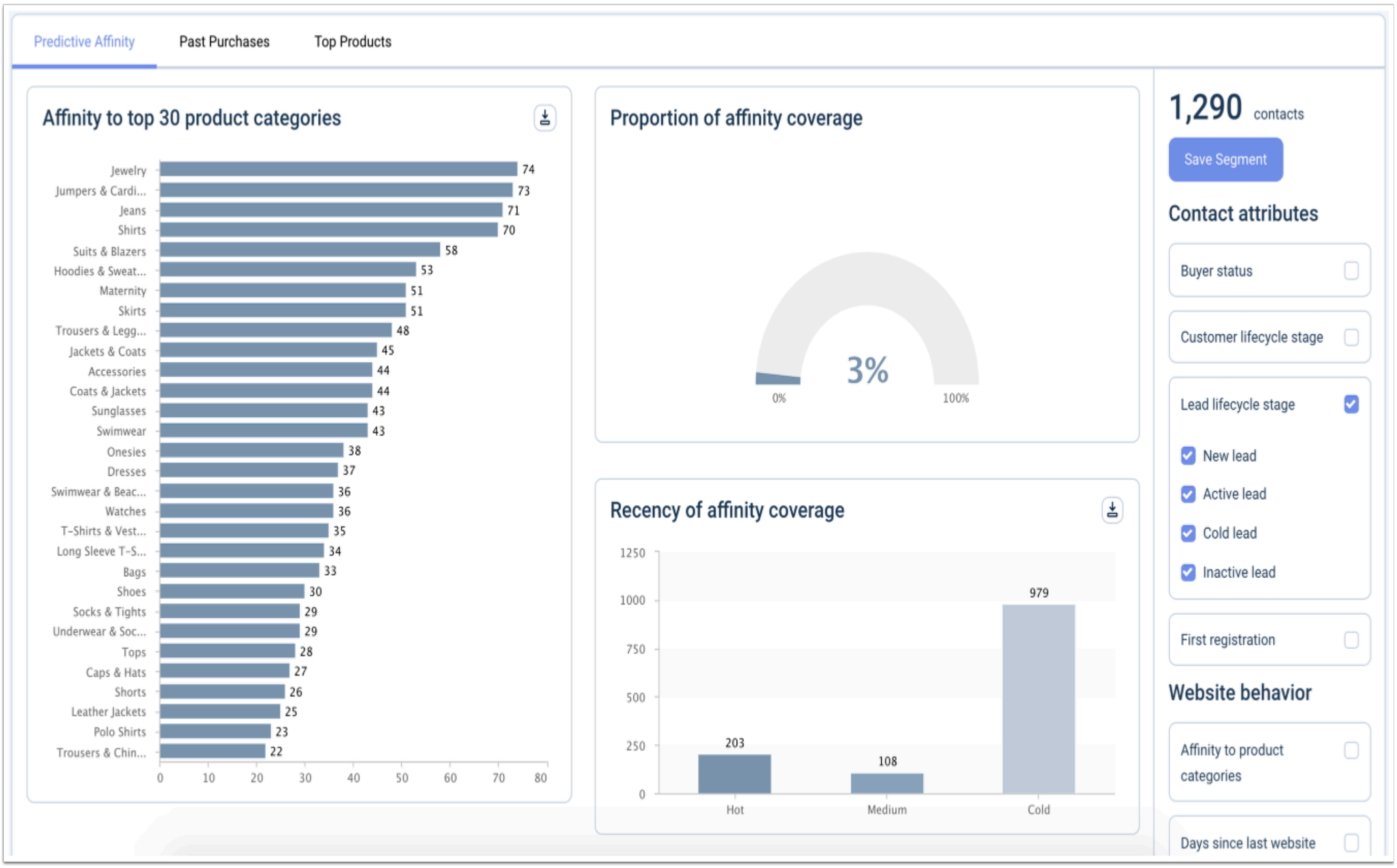
Please note that when a contact is deleted, all of the data relating to that contact is also deleted. This will retrospectively affect any reports which use contact-level data. Contact deletion may affect the reports available under **Analytics** > **Product Affinity**. You may experience the following changes:

- figures may change in all charts because contact deletion affects all calculations.
- deleting contacts also affect conversion rates, the AOV (Average Order Value) and lifecycle calculations.

For more information on the effects of contact deletion, see [What happens to deleted contacts in SAP Emarsys?]

Note

- Not all contacts are covered by these charts. Only those for whom the SAP Emarsys data collection scripts have collected enough data for the scoring algorithms to make a meaningful prediction are included. The total number is displayed in the top right corner of the tab.
- The metrics displayed on the **Predictive Affinity** screen include the entire historical sales you uploaded to Smart Insight.



→ Tip

For more information on how to create a segment using this report or how to update the chart, see Smart Insight Attributes.

Affinity to top 30 product categories

This chart shows the top 30 categories for which contacts have been identified as having an affinity. **Top categories** are calculated based on view and purchase data. You can use the **Affinity to product categories** attribute to filter the list down to a specific category and create a segment of those contact for targeted engagement campaigns.

Proportion of affinity coverage

This shows the % of your contacts for whom an affinity could be determined. For many contacts this will not be possible, for instance if they do not favor one category over another or simply do not browse or purchase enough for their data to become statistically relevant.

Recency of affinity coverage

This shows the recent activity of those contacts whose affinity can be determined. The chart is split into **Hot**, **Medium** and **Cold**, with the exact ranges being determined by you during setup. This can help you to determine the incentives to use for each segment, for example.

Past Purchases Report

The **Past Purchase** tab shows the most popular products and categories over the selected time period (the default is the past two years), as well as the contacts who purchased them.

⚠ Caution

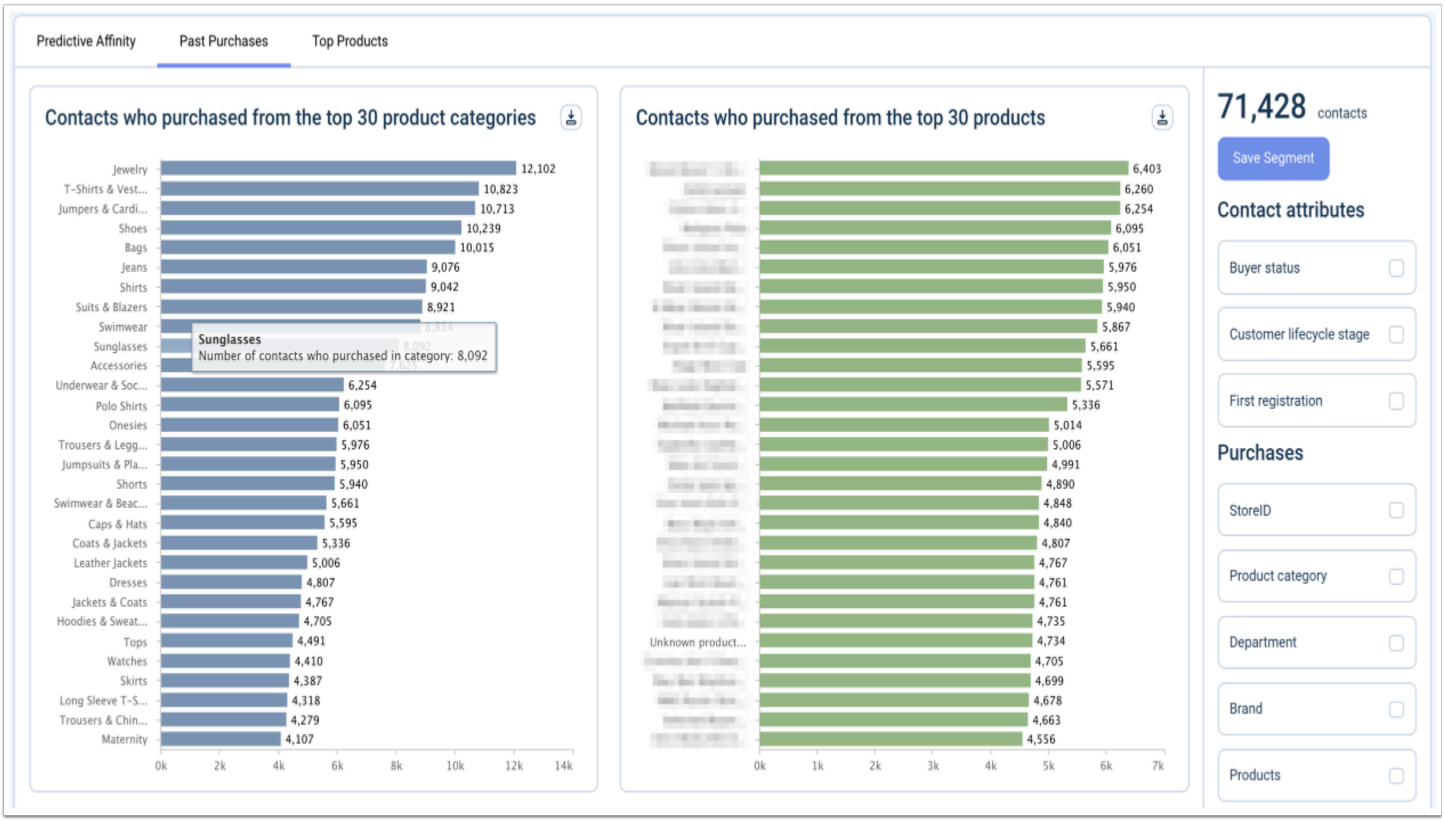
Please note that when a contact is deleted, all of the data relating to that contact is also deleted. This will retrospectively affect any reports which use contact-level data. Contact deletion may affect the reports available under **Analytics** > **Product Affinity**. You may experience the following changes:

- figures may change in all charts because contact deletion affects all calculations.
- deleting contacts also affect conversion rates, the AOV (Average Order Value) and lifecycle calculations.

For more information on the effects of contact deletion, see [What happens to deleted contacts in SAP Emarsys?](#)

i Note

The metrics displayed on the **Past Purchases** screen include the entire historical sales you uploaded to Smart Insight.



Unlike the **Predictive Affinity** charts, these are based on real data, and should be used as an indication of trends or of the success of promotional campaigns.

⚠ Caution

Please also note that this charts shows ***contacts***, not items. Therefore, if a contact purchases an item in the same category twice, they will still only appear once in the charts.

→ Tip

For more information on how to create a segment using this report or how to update the chart, see [Smart Insight Attributes](#).

Top Products Report

Top products are calculated from the combined content of your product and sales data files.

The **Top Products** tab plots your best-selling 50 products and product categories on scatter graphs.

The axes show the number of items sold and revenue generated, allowing you to gauge their relative success as conversion tools or revenue earners. Hovering the mouse over a dot shows the exact figures for that product or category.

⚠ Caution

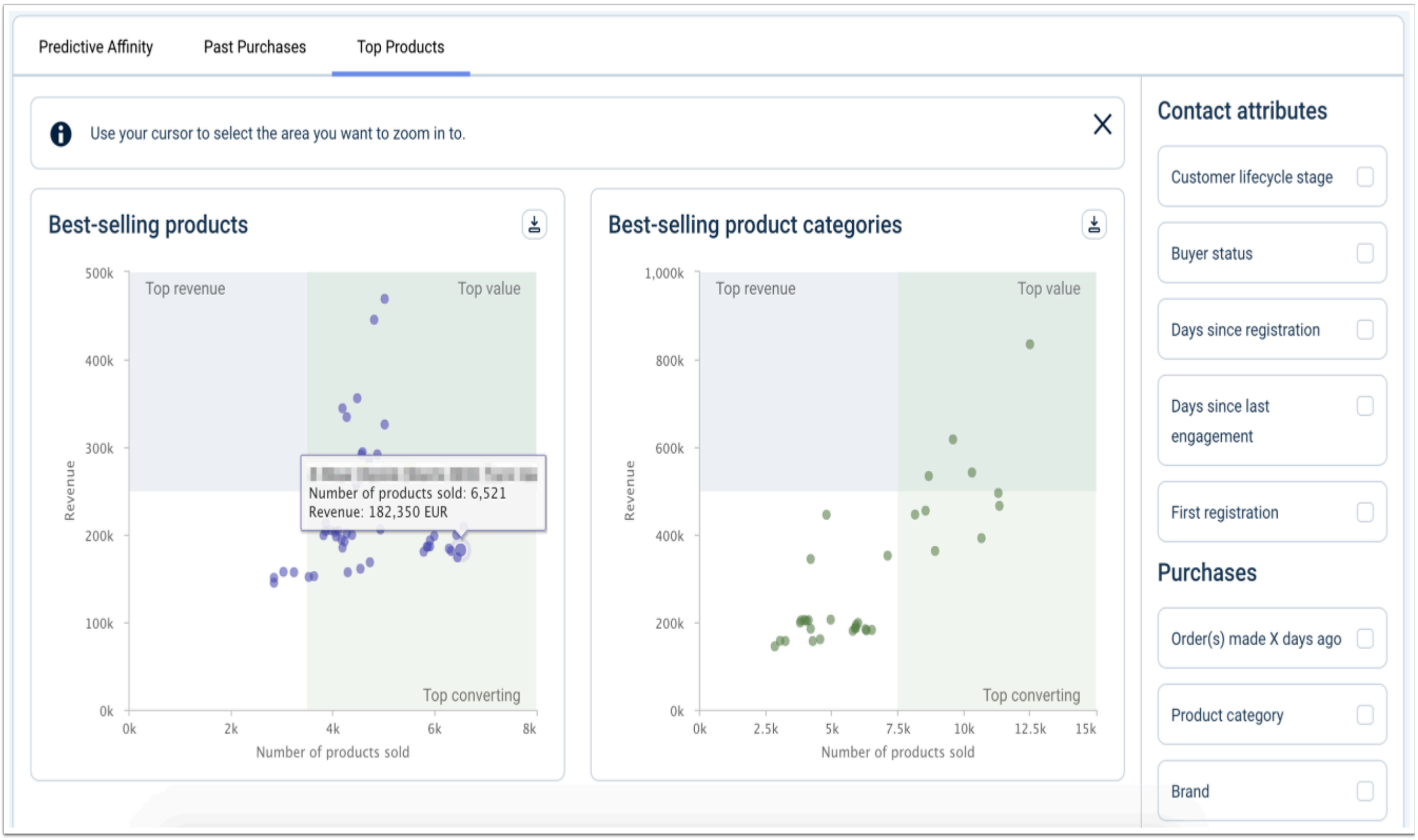
Please note that when a contact is deleted, all of the data relating to that contact is also deleted. This will retrospectively affect any reports which use contact-level data. Contact deletion may affect the reports available under **Analytics** > **Product Affinity**. You may experience the following changes:

- figures may change in all charts because contact deletion affects all calculations.
- deleting contacts also affect conversion rates, the AOV (Average Order Value) and lifecycle calculations.

For more information on the effects of contact deletion, see [What happens to deleted contacts in SAP Emarsys?]

i Note

The metrics displayed on the **Top Products** screen include the entire historical sales you uploaded to Smart Insight.



To zoom in on the chart, use your cursor to click and select the area you are interested in. To switch back, click **Reset Zoom**.

→ **Tip**

For more information on how to update the chart, see [Smart Insight Attributes](#).

Impact

The following reports are available on the **Impact** screen:

[Retention Revenue Impact Report](#)

The **Retention Revenue Impact** tab shows how much of your total revenue is generated by each lifecycle stage, both in absolute and % terms.

[Channel Revenue Impact Report](#)

The **Channel Revenue Impact** tab shows how your total revenue is distributed among different channels as opposed to other sources (for example, in-store revenue).

[Refunds Impact Report](#)

The **Refunds Impact Report shows** how refunds are distributed among lifecycles, and where it has the biggest impact on your revenue.

Retention Revenue Impact Report

The **Retention Revenue Impact** tab shows how much of your total revenue is generated by each lifecycle stage, both in absolute and % terms.

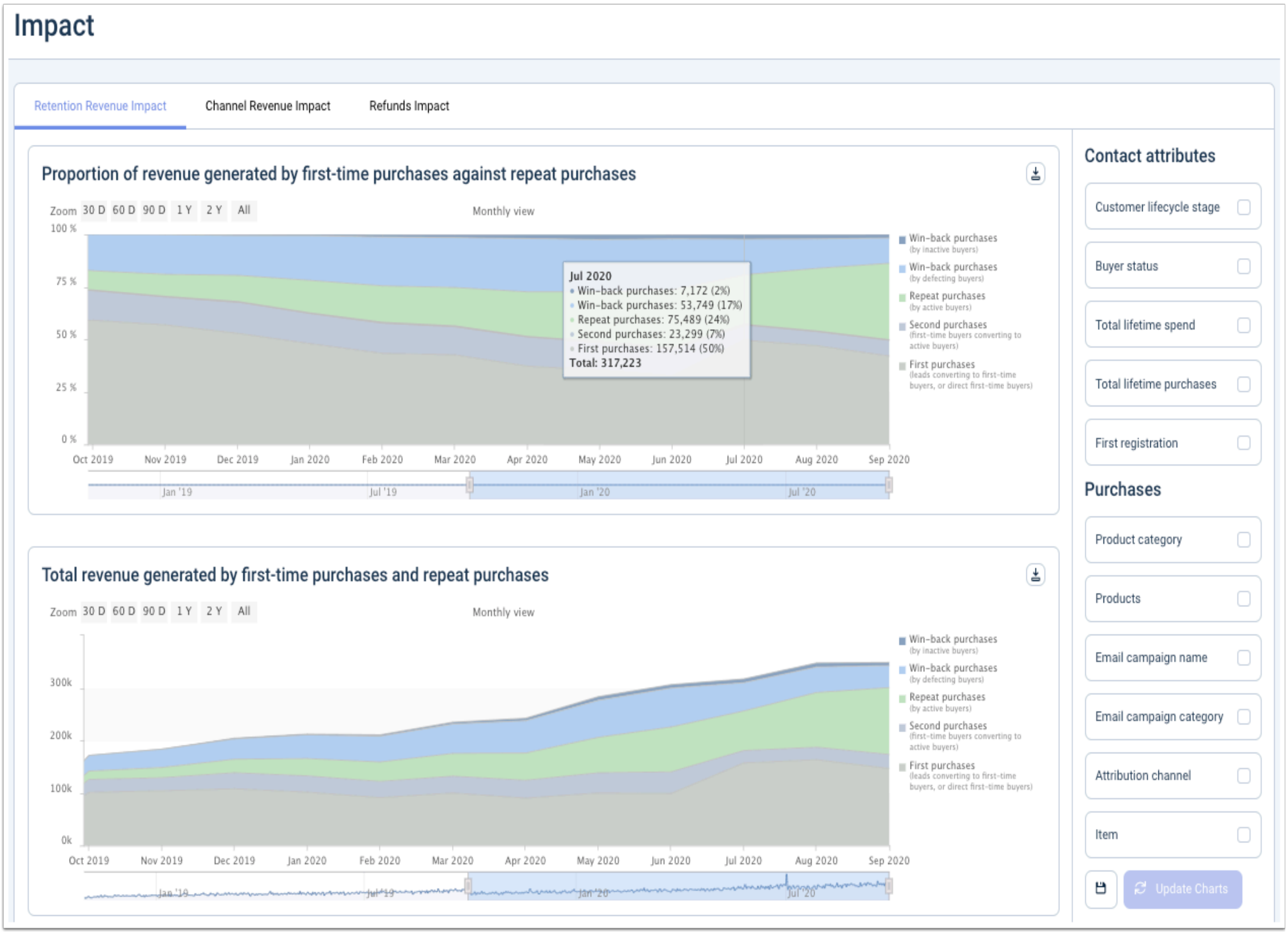
In this way you can see how successful your retention marketing strategies are, based on the value of their comparative conversions. You can select the time period from the options above the charts, or drag the slider manually. Hover your mouse over a date to see the exact figures for that period.

⚠ Caution

Please note that when a contact is deleted, all of the data relating to that contact is also deleted. This will retrospectively affect any reports which use contact-level data. Contact deletion may affect the reports available under **Analytics** > **Impact**. You may experience the following changes:

- figures may change in all charts because contact deletion affects all calculations.
- deleting contacts also affect conversion rates, the AOV (Average Order Value) and lifecycle calculations.

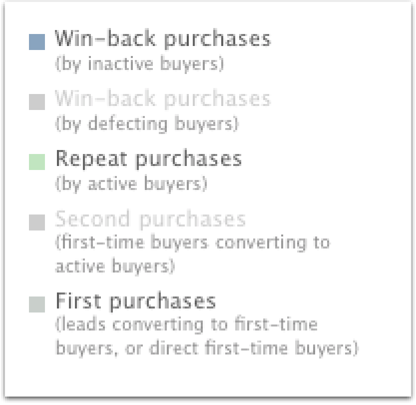
For more information on the effects of contact deletion, see [What happens to deleted contacts in SAP Emarsys?]



Click the purchase type to the right of the graph to add or remove that purchase type from the graph. The displayed purchase types are shown in **bold**:

i Note

If you have excluded purchases made by unidentified contacts from your Strategic Dashboard and Smart Insight lifecycle reports, then your reports will not show explicitly how many contacts were excluded from your statistics, except for this report. Here you can check the number of **Unidentified purchases**. For more information, see [Excluding unidentified purchases from your reports].



Whereas the **Proportional revenue** chart shows you the relative importance of your lifecycle stages, the **Total revenue** chart gives you a more direct overview of the growth of your business.

Use the **Contact attributes** to filter the charts by lifecycle stage or buyer status. In this way you can learn more about which customer types are more valuable for your business and where you should be concentrating your engagement and retention efforts.

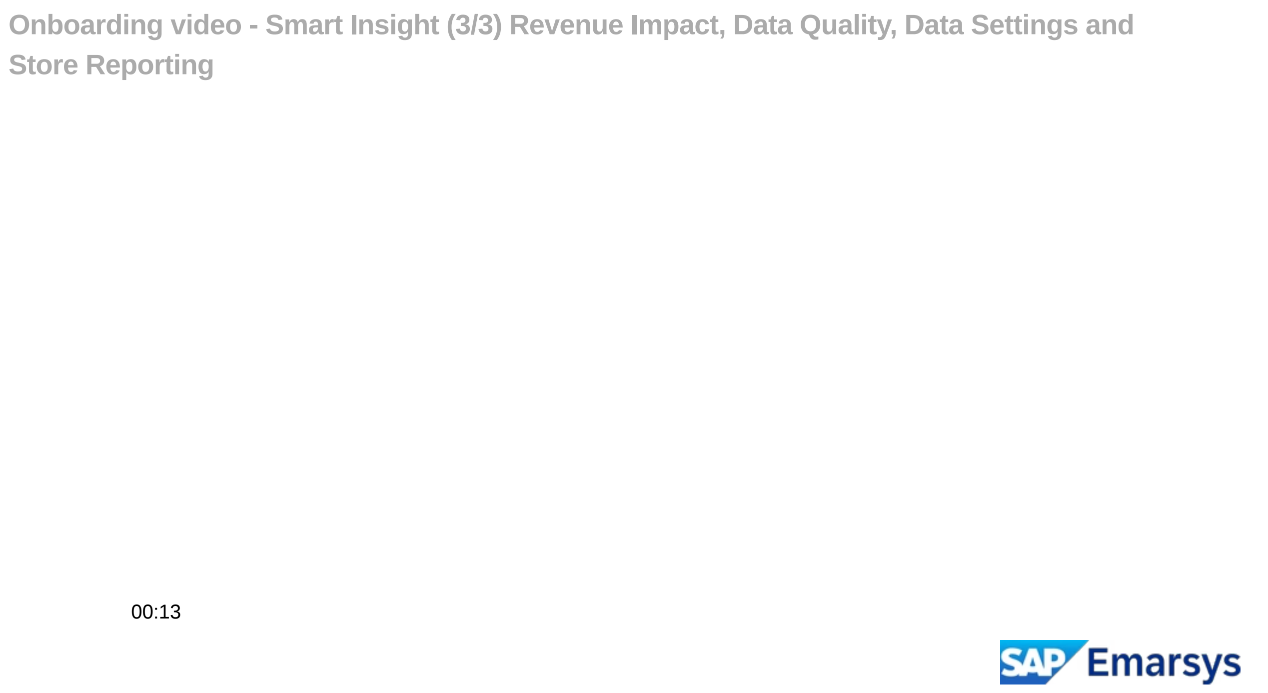
→ **Tip**

For more information on how to update the chart, see [Smart Insight Attributes].

→ **Tip**

Also, check the onboarding video about **Retention Revenue Impact:**

Disclaimer: The below video is not part of the SAP product documentation. Please read the legal disclaimer for video links before viewing this video.



Channel Revenue Impact Report

The **Channel Revenue Impact** tab shows how your total revenue is distributed among different channels as opposed to other sources (for example, in-store revenue).

In this way you can see how successful your retention marketing strategies are, based on the value of their comparative conversions.

You can select the time period from the options above the charts, or drag the slider manually. Hover your mouse over a date to see the exact figures for that period.

⚠ Caution

Please note that when a contact is deleted, all of the data relating to that contact is also deleted. This will retrospectively affect any reports which use contact-level data. Contact deletion may affect the reports available under **Analytics** > **Impact**. You may experience the following changes:

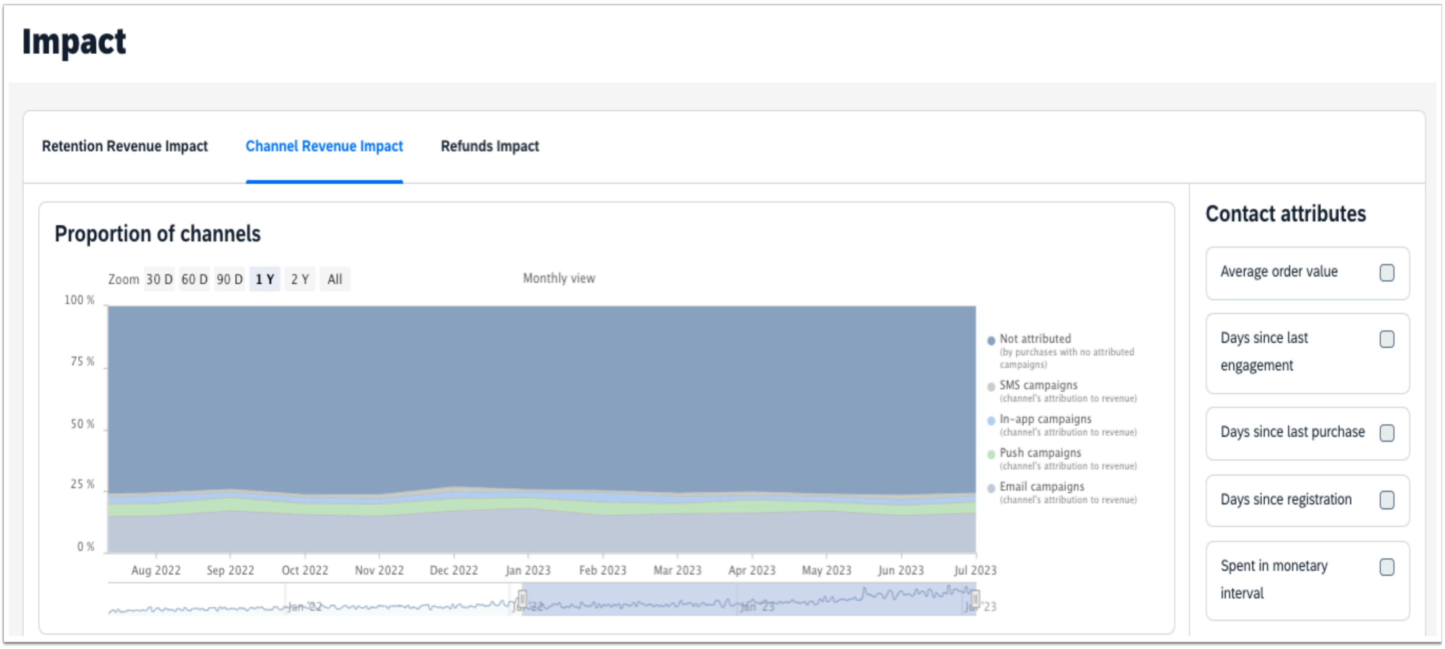
- figures may change in all charts because contact deletion affects all calculations.
- deleting contacts also affect conversion rates, the AOV (Average Order Value) and lifecycle calculations.

For more information on the effects of contact deletion, see [What happens to deleted contacts in SAP Emarsys?]

i Note

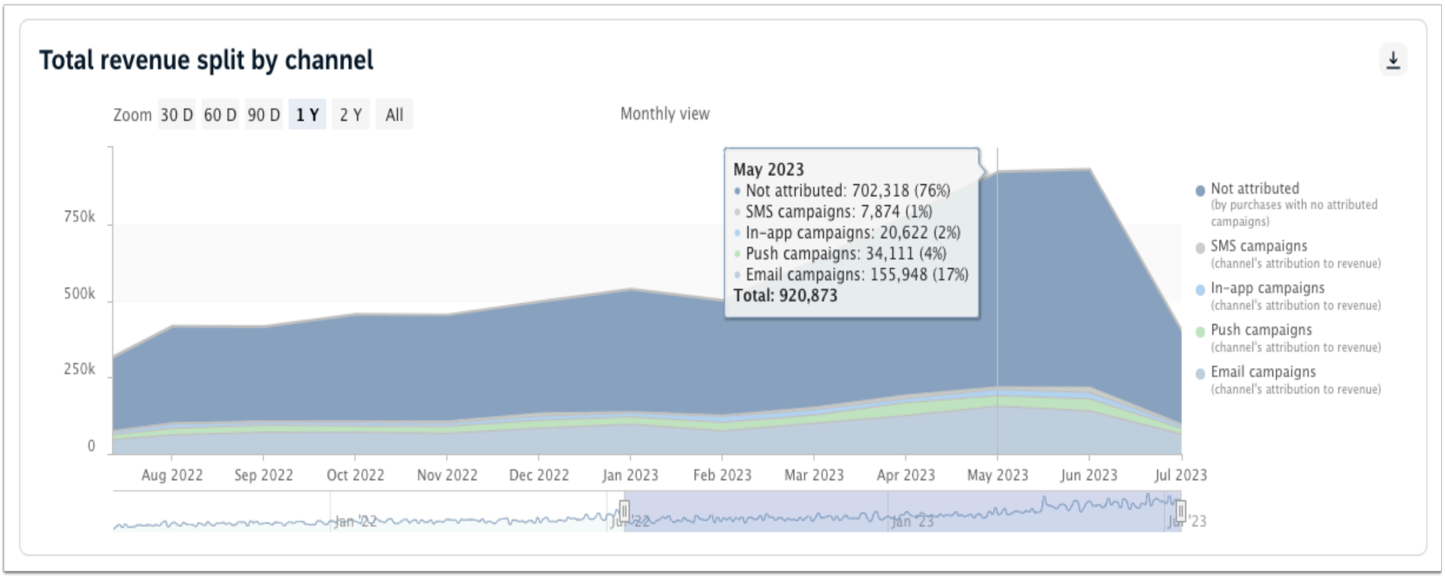
Currently, the [Revenue Attribution Service] attributes revenue to the following channels:

- Email campaigns
- Push campaigns
- SMS campaigns
- In-app campaigns



Click the channel to the right of the graph to edit the selection. The items that you removed from the chart are grayed out:

Whereas the **Proportion of channels** chart shows you the relative importance of your channel, the **Total revenue split by channel** chart gives you a more direct overview of the growth of your business.



Use the **Contact attributes** to filter the charts by lifecycle stage or buyer status. In this way you can learn more about which customer types are more valuable for your business and where you should be concentrating your engagement and retention efforts.

→ **Tip**

For more information on how to update the chart, see [Smart Insight Attributes](#).

Low match rate

It can happen that you see a message on this page that reads:

The match rate between the email campaign data we receive from you and what we collect from your web shop is only xx%. This means the revenue from your Emarsys campaigns could be higher than what is shown here. Please check that the Emarsys data collection scripts are correctly implemented on all your web shop pages.

This is displayed if we feel that the data from the orders we collect from your web shop and those you upload to Smart insight do not match closely enough. We expect some deviation due to synchronization lag, but if this exceeds 20% of the total orders then we do not show the success attribution on the Customer Lifecycle Dashboard and display this message here on this screen.

Why might this happen?

There are a number of reasons why this discrepancy can occur.

- The Web Extend scripts collect purchases, but do not track cancellations or refunds. If your orders typically contain many items, and a large proportion of these are returned, this can cause a low match rate.
- If an order ID collected by Web Extend does not match any order ID that exists in Smart Insight, this will be treated as an unmatched order and it will not appear in Smart Insight.

What should I do if I see this message?

In most cases, the low match rate is a temporary drop in data synchronization and will correct itself. If you see this message persisting, the most likely cause is an error in your Web Extend scripts, particularly in the collection of order IDs. You should first check that, and if you need more assistance, contact Emarsys Support.

FAQ

Why is Total revenue different on the Revenue Analytics and Channel Revenue Impact screens?

The values next to **Total revenue** and **Total** might be different because Revenue Analytics takes the refunds into account when calculating the **Total revenue**, while refunds are not taken into consideration on the Channel Revenue Impact screen.

Refunds Impact Report

The **Refunds Impact Report shows** how refunds are distributed among lifecycles, and where it has the biggest impact on your revenue.

You have the same filtering options as for the Revenue Impact Report, making it possible to drill down to specific audience groups or products. These options can help you to spot problematic product lines or identify trends in returns.

⚠ Caution

Please note that when a contact is deleted, all of the data relating to that contact is also deleted. This will retrospectively affect any reports which use contact-level data. Contact deletion may affect the reports available under **Analytics** > **Impact**. You may experience the following changes:

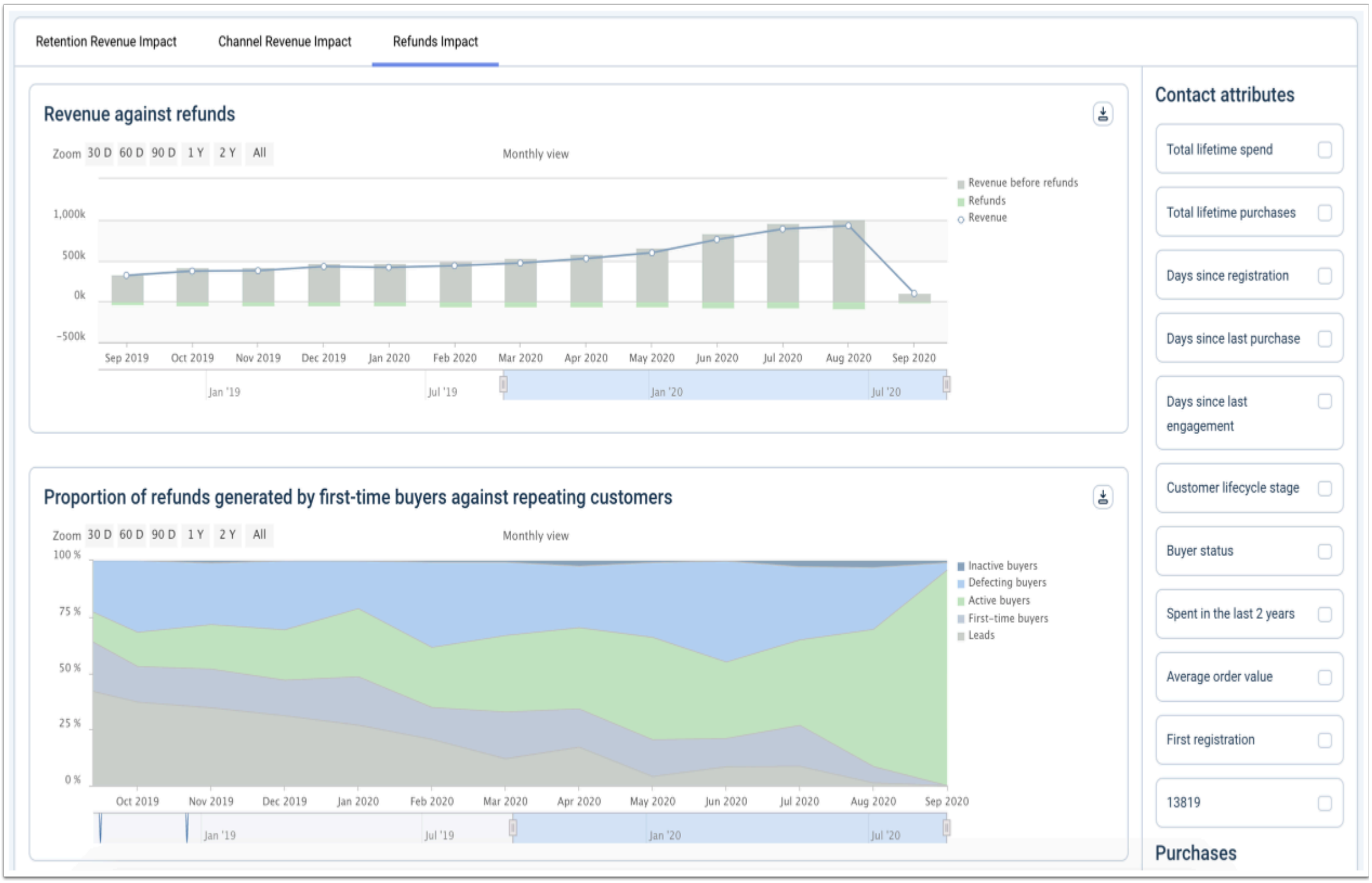
- figures may change in all charts because contact deletion affects all calculations.
- deleting contacts also affect conversion rates, the AOV (Average Order Value) and lifecycle calculations.

For more information on the effects of contact deletion, see What happens to deleted contacts in SAP Emarsys?

→ Tip

Tips:

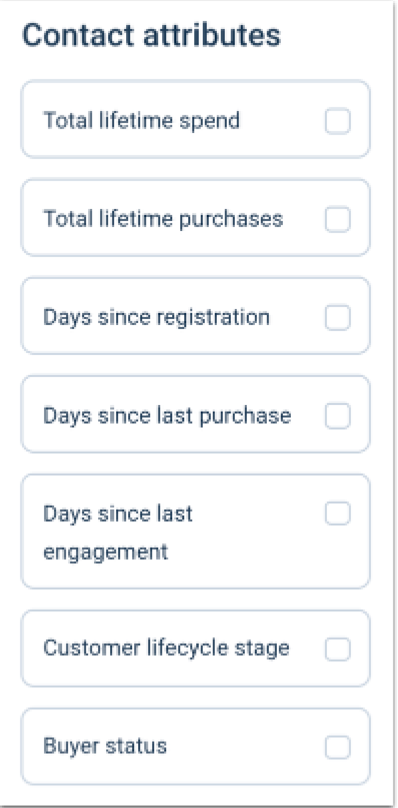
- You can select the time period from the options above the charts, or drag the slider below the charts manually.
- To see the exact figures for a specific period, hover your mouse over a date.



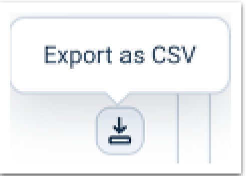
Here you can:

- Remove an item from a chart by clicking the specific value on the right. Values that are not displayed in the chart are greyed out.

- Filter the charts by lifecycle stage or buyer status by using the **Contact attributes** filters. In this way you can learn more about which customer types are more valuable for your business and where you should be concentrating your engagement and retention efforts.



- Save the data displayed in the chart by clicking the **Export to CSV** button in the top right corner of the specific chart.

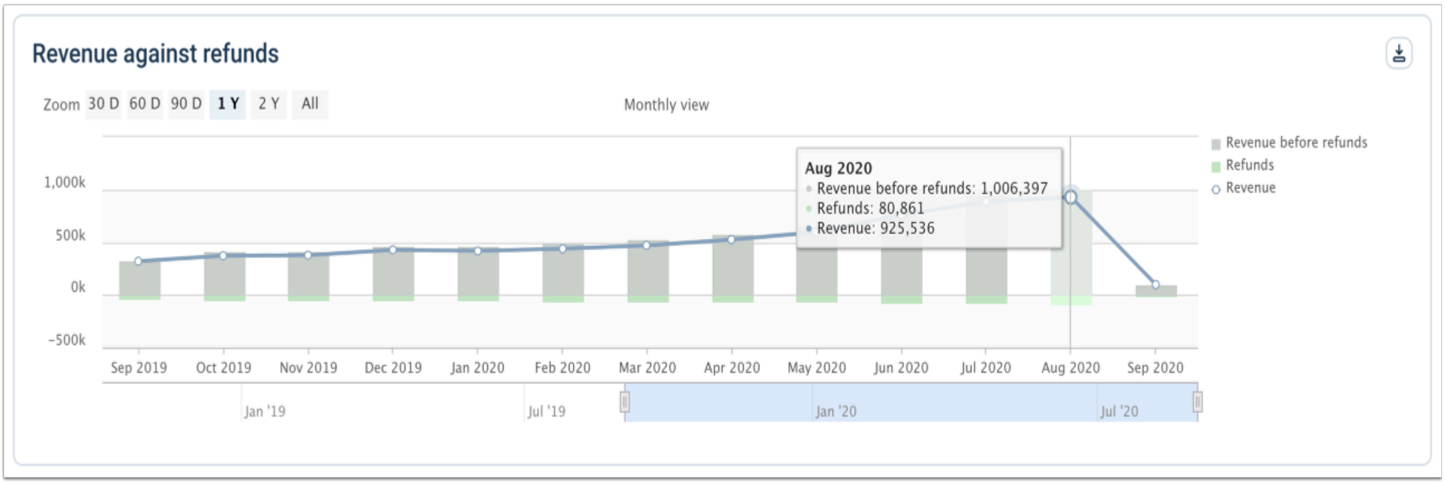


→ **Tip**

For more information on how to update the chart, see Smart Insight Attributes.

Revenue against refunds

You can see the proportion of refunds to your revenue in this chart.



Here you can see the following values:

- **Revenue before refunds** - Your revenue before refunds were were removed from your reports.

- **Refunds** - The value of refunds.
- **Revenue** - Your revenue after refunds were removed from your reports.

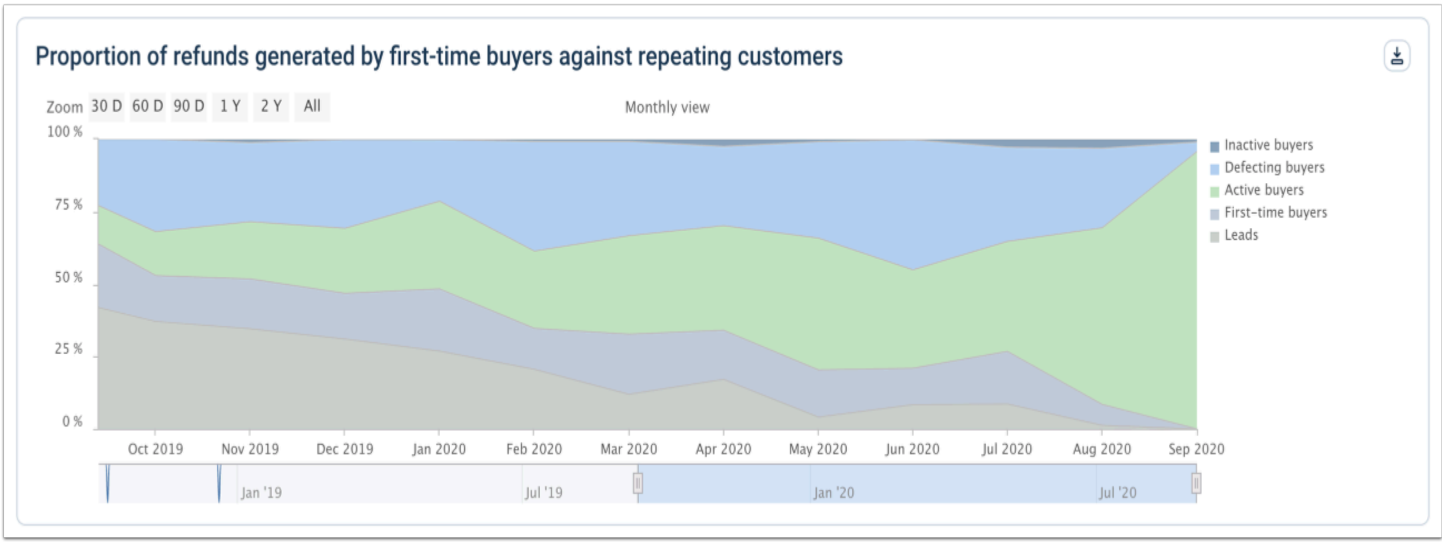
Proportion of refunds generated by first-time buyers against repeating customers

You can see the proportion of refunds generated by the different customer lifecycle stages in this chart.

Note

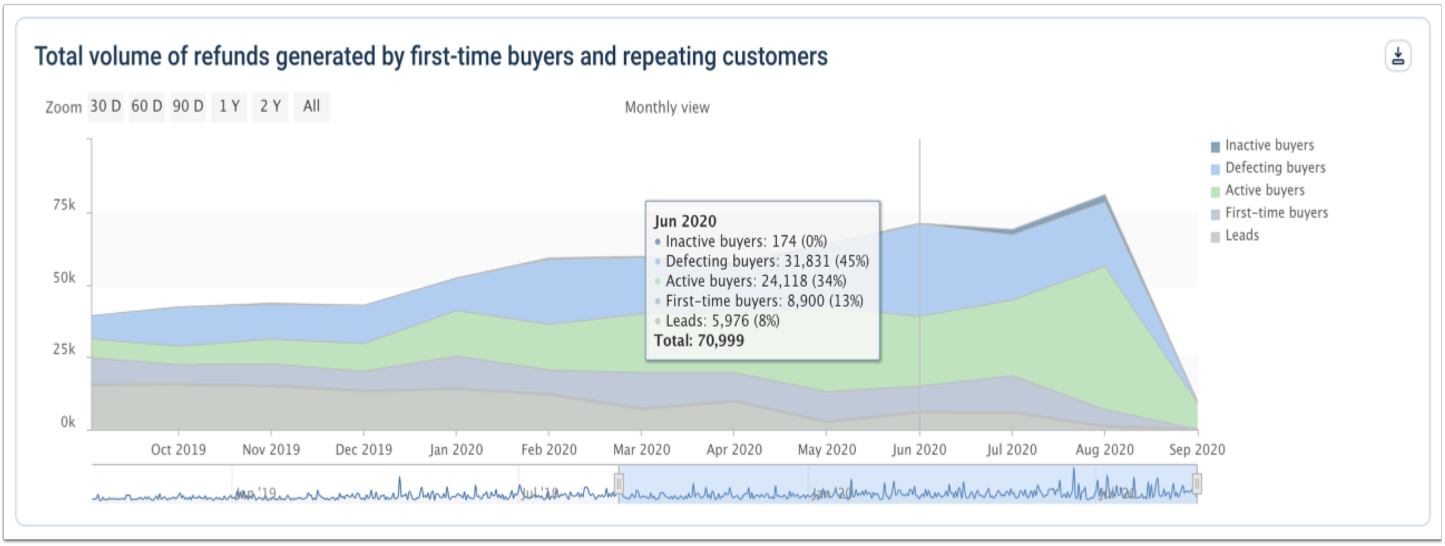
Notes:

- If you have turned on the **Refunds affect lifecycle calculation** switch on the Smart Insight Settings page, then purchases that have been fully refunded will be removed from your reports. This can affect the lifecycle status of your contacts. For example, if a customer is a First-time buyer and they receive a full refund, their lifecycle status will revert back to Lead.
- Refunds reflect the lifecycle stage of contacts at the time of the relevant purchase. For example, customers who made only one purchase are first-time buyers. After their transactions are refunded, these customers count as contacts who made a refund in the Lead lifecycle stage.



Total volume of refunds generated by first-time buyers and repeating customers

You can see how refunds are distributed among the different customer lifecycle stages in this chart.



Refunds in Smart Insight Reports and Calculations

You can check which Smart Insight reports and calculations include refunds on this page.

RFM calculations

Note

For more information, see The eRFM parameters tab.

- Lifecycle calculations - These calculations do not include refunds. For example, a contact who made 2 purchases will remain an **Active customer** even if both transactions are refunded.

Note

If you have turned on the **Refunds affect lifecycle calculation** switch on the Smart Insight Settings page, then purchases that have been fully refunded will be removed from your reports. This can affect the lifecycle status of your contacts. For example, if a customer is a First-time buyer and they receive a full refund, their lifecycle status will revert back to Lead.

- Buyer status calculations (including the **Total lifetime spend** filter) - These calculations include refunds. For example, a contact who made 2 purchases and refunded these transactions will become a **Low spender** whose **Total lifetime spend** value is 0.

Customer Lifecycle

For more information, see Refunds in the Customer Lifecycle Reports.

Product Affinity

For more information, see Refunds in the Product Affinity Reports.

Impact

For more information, see Refunds in the Impact Reports.

Smart Insight Data Quality

The reports on the Smart Insight Data Quality page include refunds.

Smart Insight Attributes

Note

If you use the **Orders made X day(s) ago** filter, then refunds will be filtered out from the results.

For more information, see Smart Insight Attributes.

Refunds in the Customer Lifecycle Reports

Here you can find detailed information on refunds in the Smart Insight Customer Lifecycle Reports.

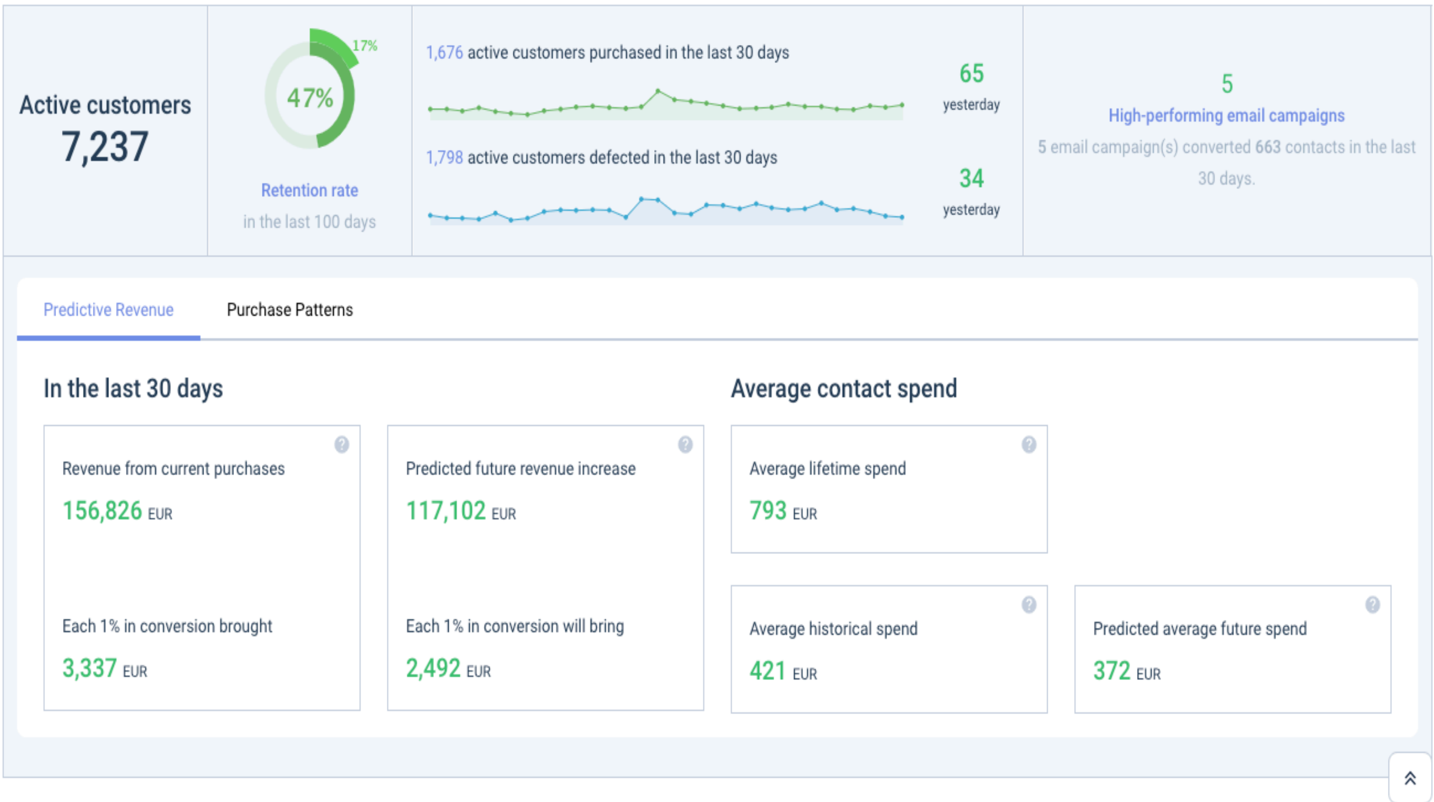
The Smart Insight Dashboard

Note

For more information, see The Customer Lifecycle Dashboard.

Metrics	Do these metrics include refunds?
Conversion rate	These metrics do not include refunds.
Re-purchase rate	These metrics do not include refunds.
Retention rate	These metrics do not include refunds.
Win-back rate	These metrics do not include refunds.
High-performing email campaigns	These metrics do not include refunds.

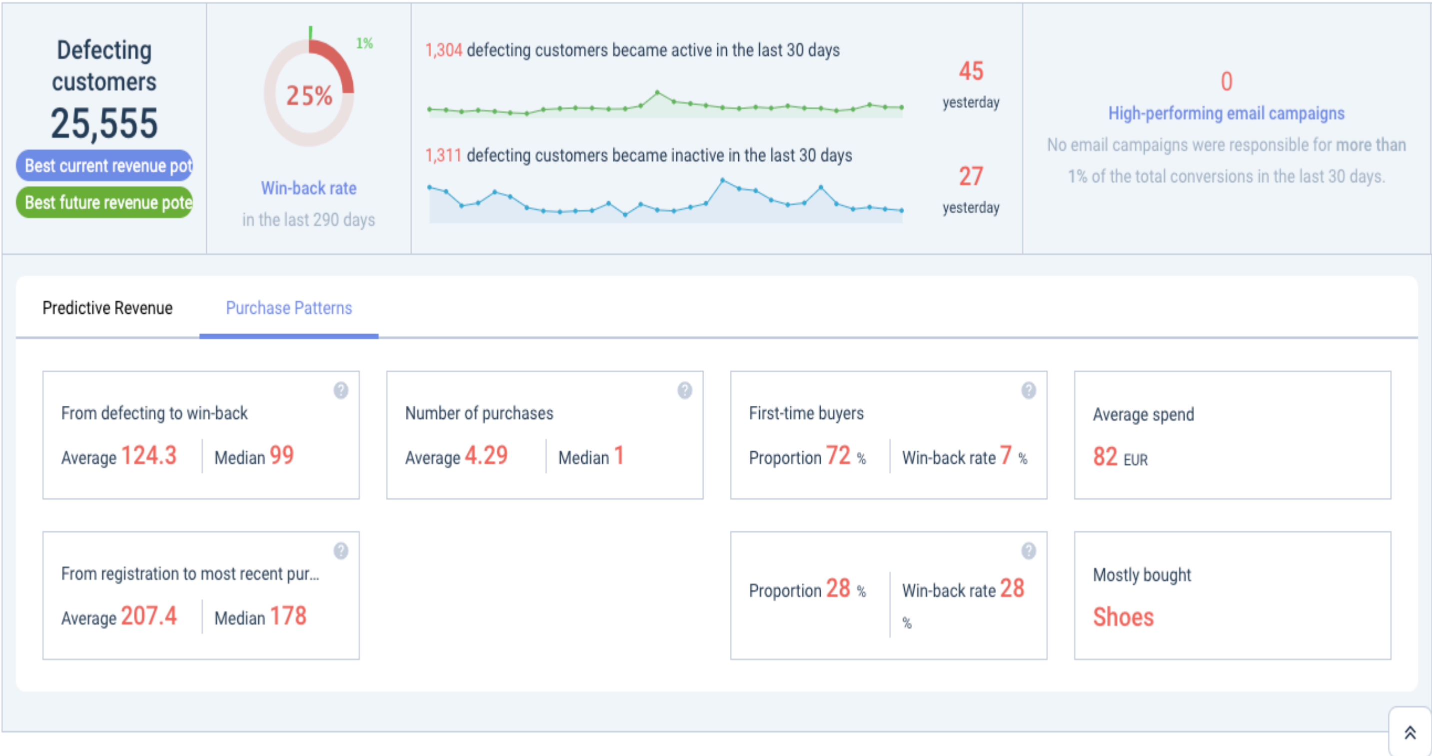
Predictive Revenue



Metrics	Do these metrics include refunds?
Revenue from current purchases	These metrics do not include refunds.

Metrics	Do these metrics include refunds?
Predicted future revenue increase	These metrics include refunds.
Average lifetime spend	These metrics include refunds.
Average historical spend	These metrics include refunds.
Predicted average future spend	These metrics include refunds.

Purchase Patterns



Metrics	Do these metrics include refunds?
Average spend	These metrics do not include refunds.
Mostly bought	These metrics do not include refunds.

Detailed reporting drill-downs

→ Tip

To open the detailed reporting page of a specific lifecycle stage, click the **Conversion rate** or **High-performing campaigns** metrics.

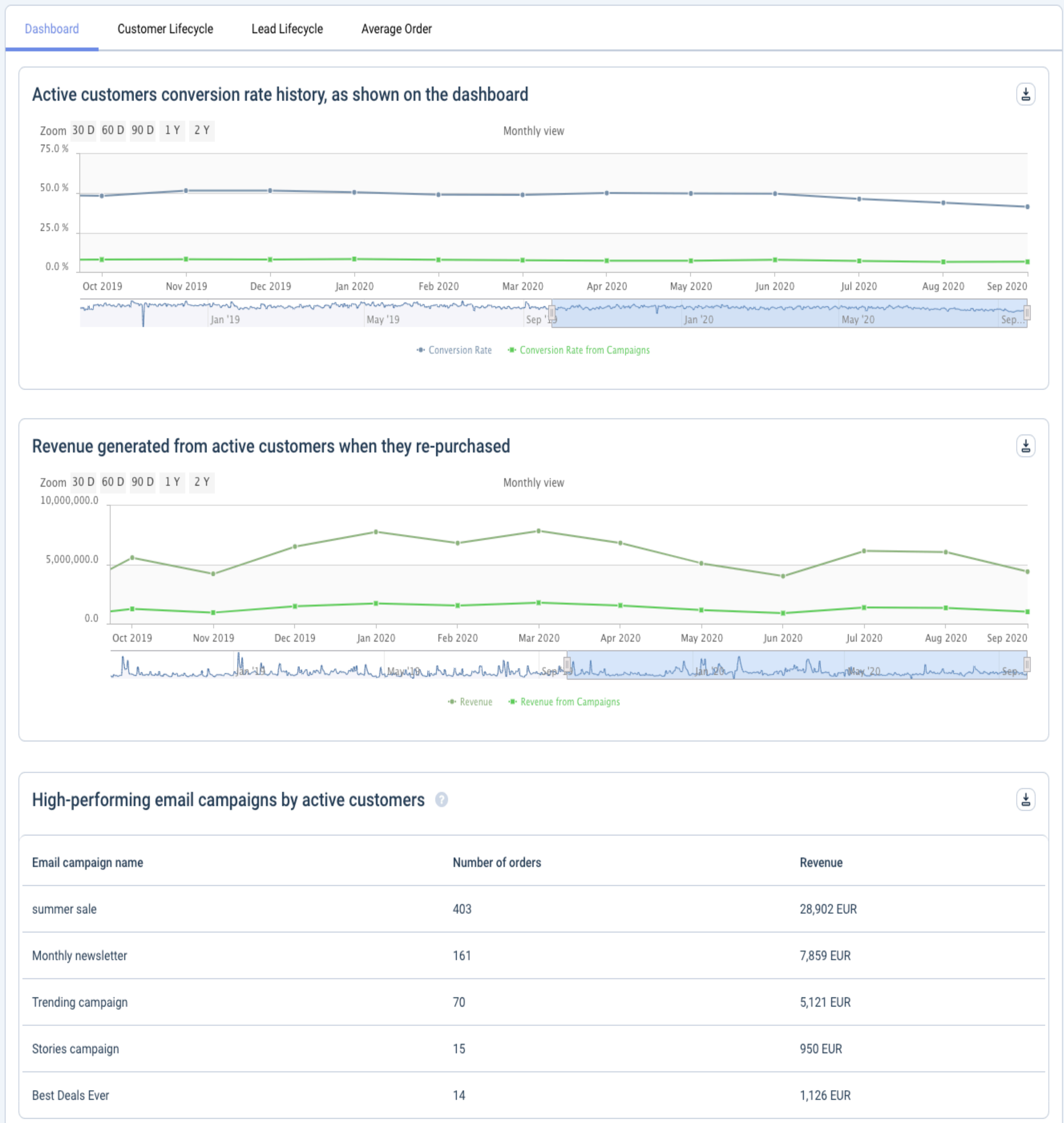


Chart	Does this chart include refunds?
Conversion rate history	This chart does not include refunds.
Revenue history	This chart does not include refunds.
High-performing email campaigns	This chart does not include refunds.

Customer Lifecycle Report

i Note

For more information, see the Customer Lifecycle Report.

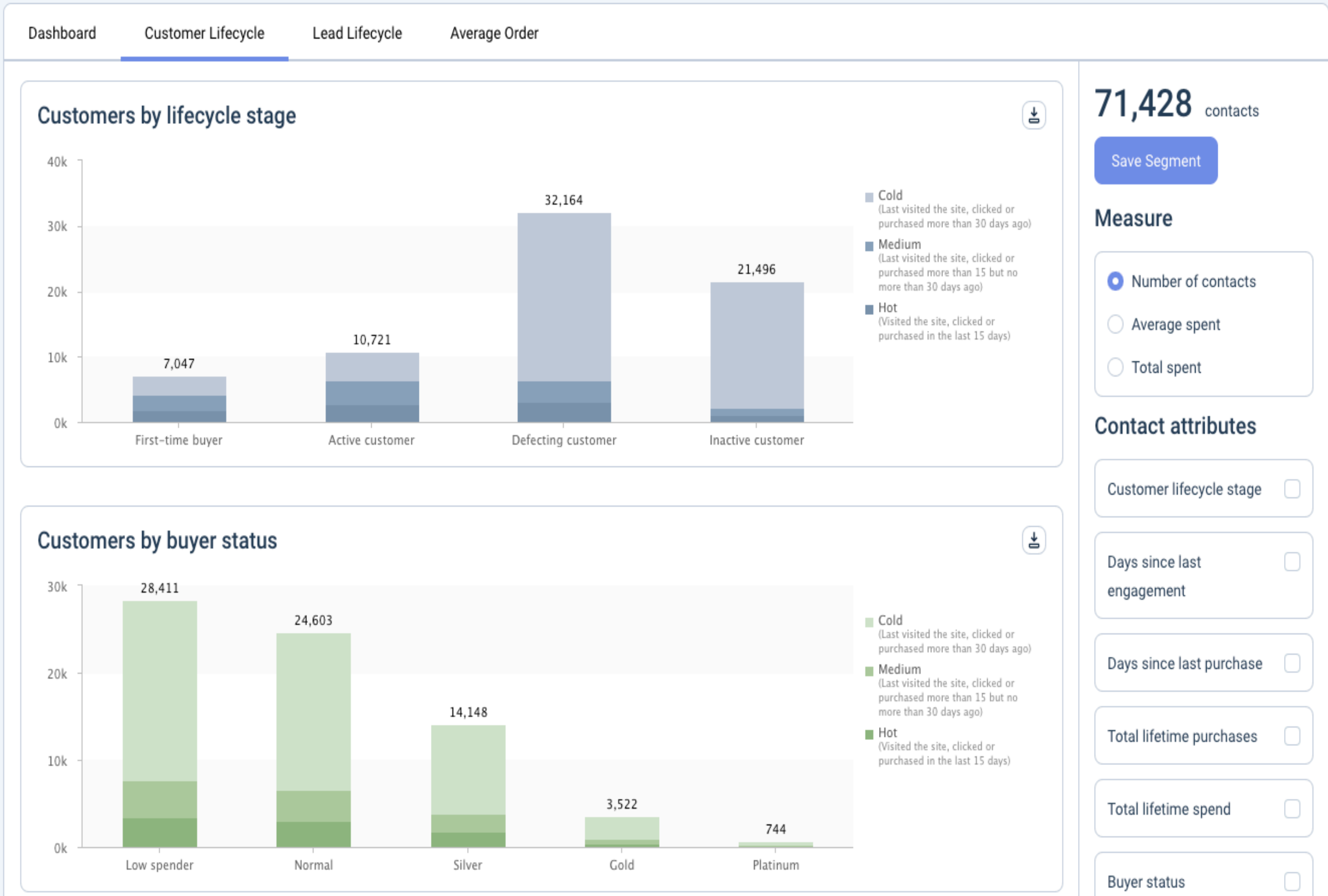


Chart	Measure	Does this chart include refunds?
Customers by lifecycle stage	Number of contacts	Please see section RFM calculations.
Customers by lifecycle stage	Average spent	This chart includes refunds.
Customers by lifecycle stage	Total spent	This chart includes refunds.
Customers by buyer status	Number of contacts	This chart includes refunds.
Customers by buyer status	Average spent	This chart includes refunds.
Customers by buyer status	Total spent	This chart includes refunds.

Lead Lifecycle Report

Refunds data are not available on the Lead Lifecycle Report.

Average Order Report

i Note

For more information, see Average Order Report.

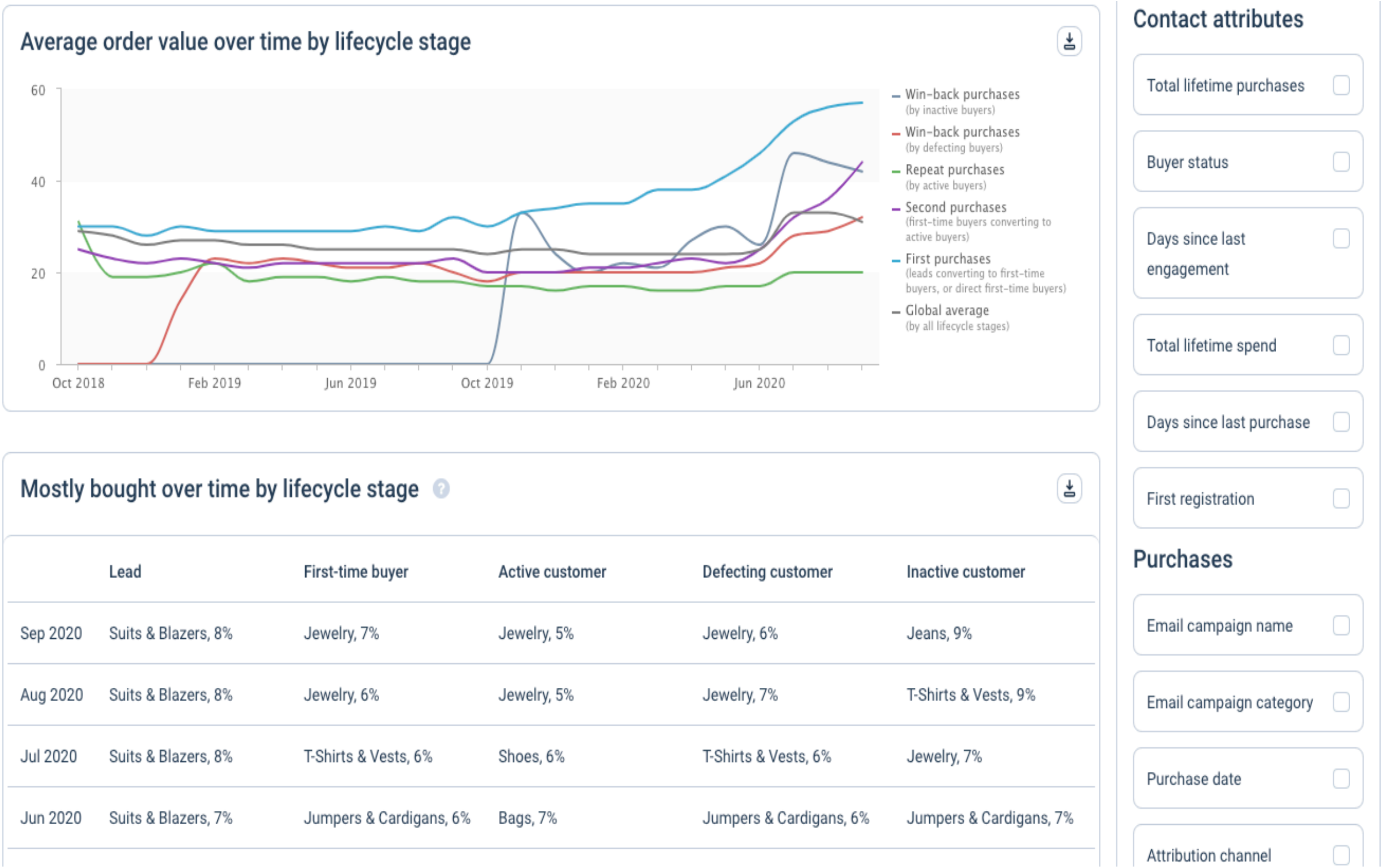


Chart	Does this chart include refunds?
Average order value over time by lifecycle stage	This chart includes refunds.
Mostly bought over time by lifecycle stage	This chart includes refunds.

RFM Advisor

ℹ Note

For more information, see RFM Advisor.

Chart	Does this chart include refunds?
Distribution of purchases by time passed until the next purchase	This chart does not include refunds.
Distribution of customers by total amount spent	This chart includes refunds.

Refunds in the Product Affinity Reports

Here you can find detailed information on refunds in the Smart Insight Product Affinity reports.

Predictive Affinity Report

Refunds data are not available on the Predictive Affinity Report.

Past Purchases Report

i Note

For more information, see Past Purchases Report.

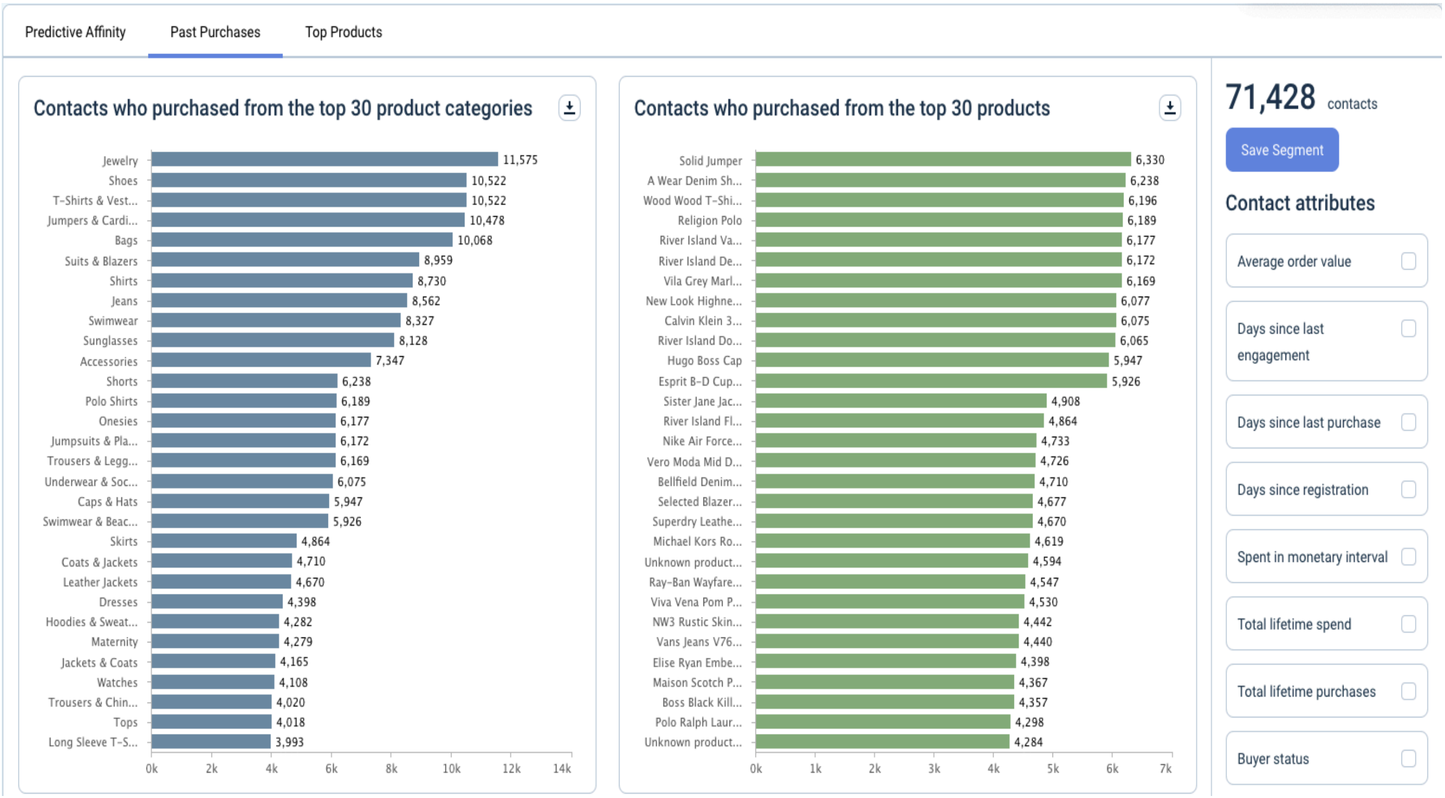
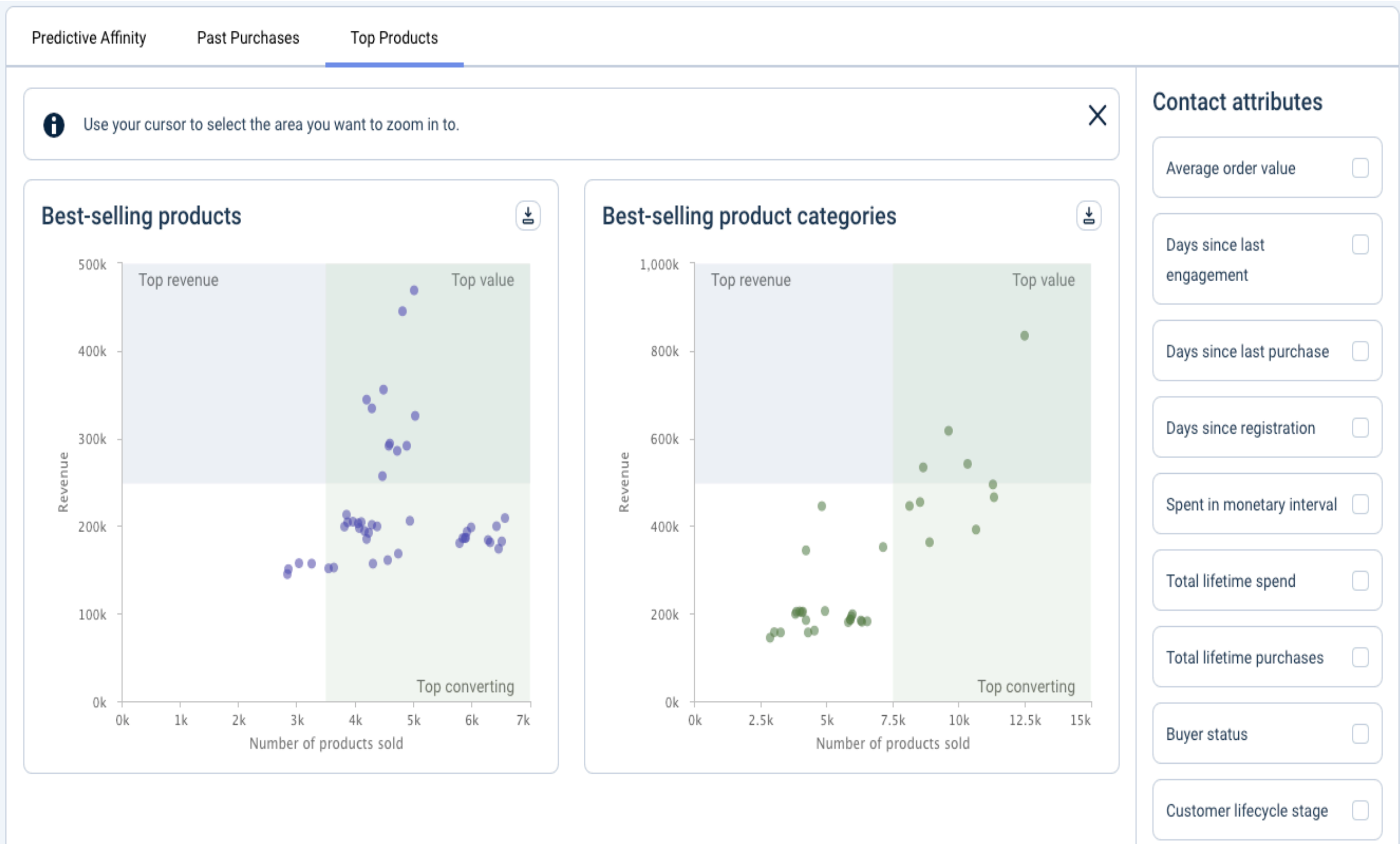


Chart	Does this chart include refunds?
Top 30 product categories	If a customer made a purchase and returned the purchased item, this chart will still count it as a purchase.
Top 30 products	If a customer made a purchase and returned the purchased item, this chart will still count it as a purchase.

Top Products Report

ℹ Note

For more information, see Top Products Report.



Graph	Does this graph include refunds?
Best-selling products	This graph includes refunds.
Best-selling product categories	This graph includes refunds.

Refunds in the Impact Reports

Here you can find detailed information on refunds in the Smart Insight Impact reports.

Retention Revenue Impact Report

i Note

For more information, see Retention Revenue Impact Report.

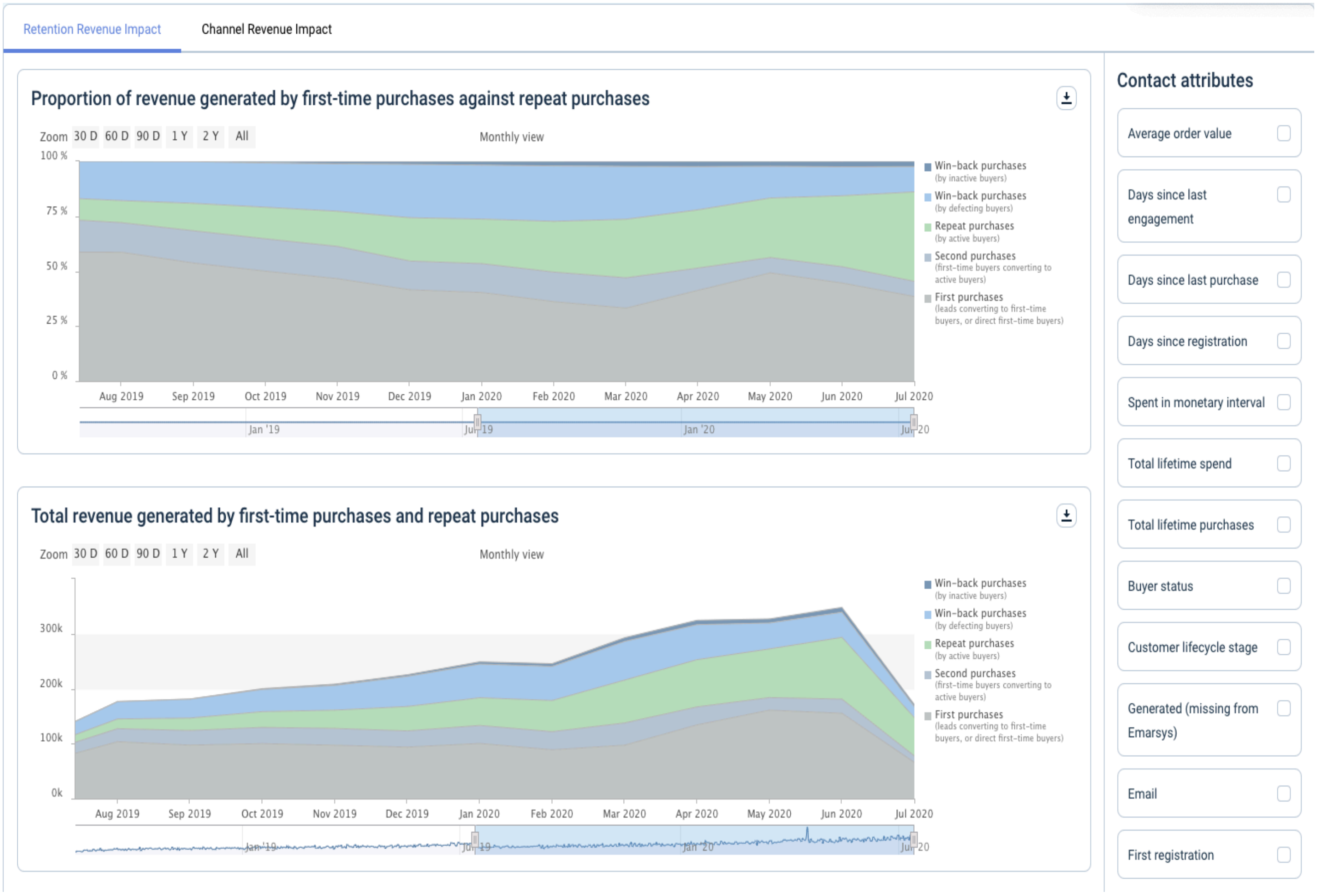


Chart	Does this chart include refunds?
Proportion of revenue generated by first-time purchases against repeat purchases	This chart does not include refunds.
Total revenue generated by first-time purchases and repeat purchases	This chart does not include refunds.

Channel Revenue Impact Report

ℹ Note

For more information, see Channel Revenue Impact Report.

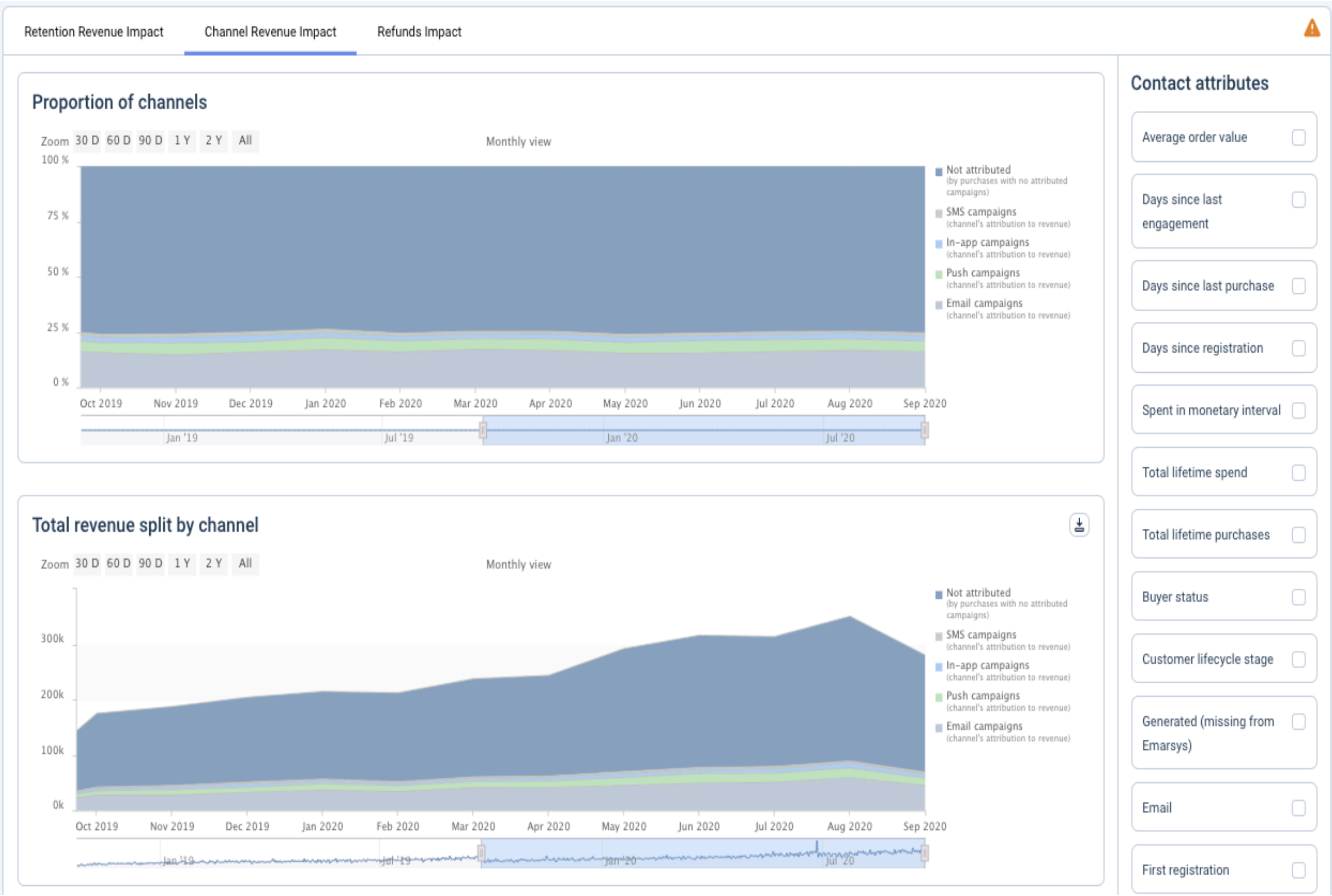


Chart	Does this chart include refunds?
Proportion of channels	This chart does include refunds.
Total revenue split by channel	This chart does include refunds.

Smart Insight Data Quality

You can check the status and monitor the quality of your Smart Insight data on the **Smart Insight Data Quality** page.

Note

Smart Insight Data Quality is found under the menu **Management** > **Smart Insight Data Quality**.

Note

If you are using our Batch Sales Data Load solution, then you can check your sales data loads and data quality notifications on the **Management** > Sales Data Loads page.

→ Tip

We also suggest that you check back on your integration's health by opening the **Predict Data Sources tools** from **Management** > **Predict Data Sources**. Learn more.

Introduction

Data quality is one of the most important aspects of online marketing and e-commerce. Accurate, consistent and reliable data is the key to achieve your business goals. The **Smart Insight Data Quality** page provides you with up-to-date reports of your contact, product, order and sales data collected by Smart Insight. You can check the quality of your data uploaded to Smart Insight on this page.

> **Note**
> The **Smart Insight Data Quality** page is refreshed after each data load.

Tabs

The following tabs are available on the **Smart Insight Data Quality** screen:

- The Overview Tab
- The Data Loads Tab

Editing the thresholds

You can adjust the threshold for each Smart Insight data quality metric. When the threshold of a metric exceeds the specified value, a warning will be displayed next to it.

To edit the threshold of your Smart Insight data quality metrics, proceed as follows:

1. Click the **Edit Thresholds** button at the bottom of the page.
2. Set the required values.

> **Note**
> - You can disable warning messages for specific metrics by checking the **Ignore** checkbox. If you activate this feature, then you will not receive warning messages when the selected metric exceeds the specified threshold.
> - If you select a metric to be ignored, then the export option will be disabled. In case of an individual metric the *warning* icon is replaced by the *info* icon.

Edit thresholds

You can adjust or disable the warning thresholds for each Smart Insight data quality metric here. When a threshold is exceeded, a warning is displayed.

Contacts Data

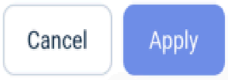
Metric	Is greater than		
Contacts with negative turnover	0		Ignore
Last contacts load	3	day(s)	Ignore
Outlier purchases	10	%	Ignore
Unidentified contacts	0		Ignore

Products Data

Metric	Is greater than		
Last product load	3	day(s)	Ignore
Products with no category	0		Ignore
Products with no name	0		Ignore
Unknown products	0		Ignore

Purchases Data

Metric	Is greater than		
Duplicated item purchases	0		Ignore
Future purchase dates	0		Ignore
Last purchase load	3	day(s)	Ignore
Latest purchase date	3	day(s)	Ignore
Missing purchase days	0		Ignore
Missing purchase periods	0		Ignore
Oldest purchase	2	year(s)	Ignore
Orders with duplication	0		Ignore
Orders with multiple contacts	0		Ignore
Outdated purchases	0		Ignore



3. Once you are ready, click **Apply** at the bottom of the page.

Sending email notifications

You can subscribe to email notifications that you will receive when there is a new Smart Insight data quality warning or a data load error occurs in your daily load on the **Notifications** > **Settings** > **Data Management Notifications** page.

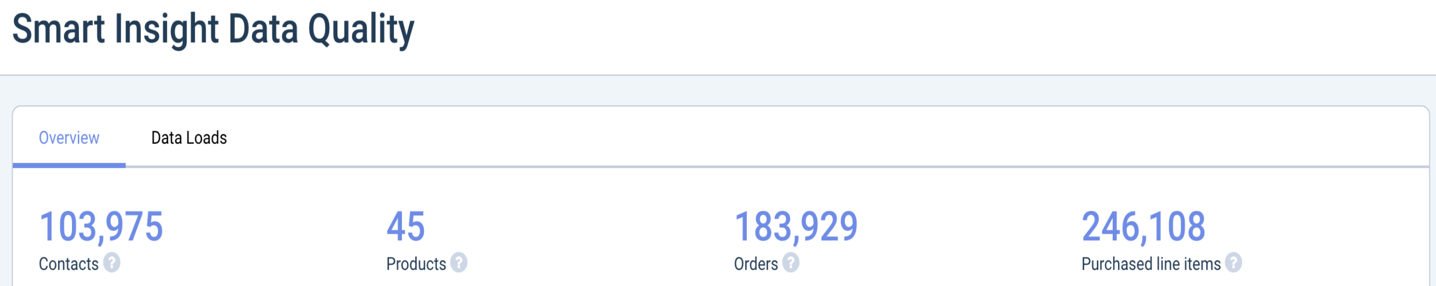
i Note

For more information, see [Custom notification settings](#) and [Data management notifications](#).

The Overview Tab

On the **Overview** tab, you can see reports of **Contact**, **Product** and **Purchase data** uploaded to Smart Insight and their quality.

At the top of the page you can see the overall number of **Contacts**, **Products**, **Orders** and **Purchased line items** uploaded into Smart Insight.



Here you can see the following metrics:

- **Contacts** - The total number of contacts, including identified, unidentified and anonymized contacts.
- **Products** - The total number of products that have ever been uploaded to Smart Insight.
- **Orders** - The total number of individual purchases made.
- **Purchased line items** - The total number of lines (i.e. separate items purchased) in all orders.

i Note

The following icons indicate the status of your data quality in each section:

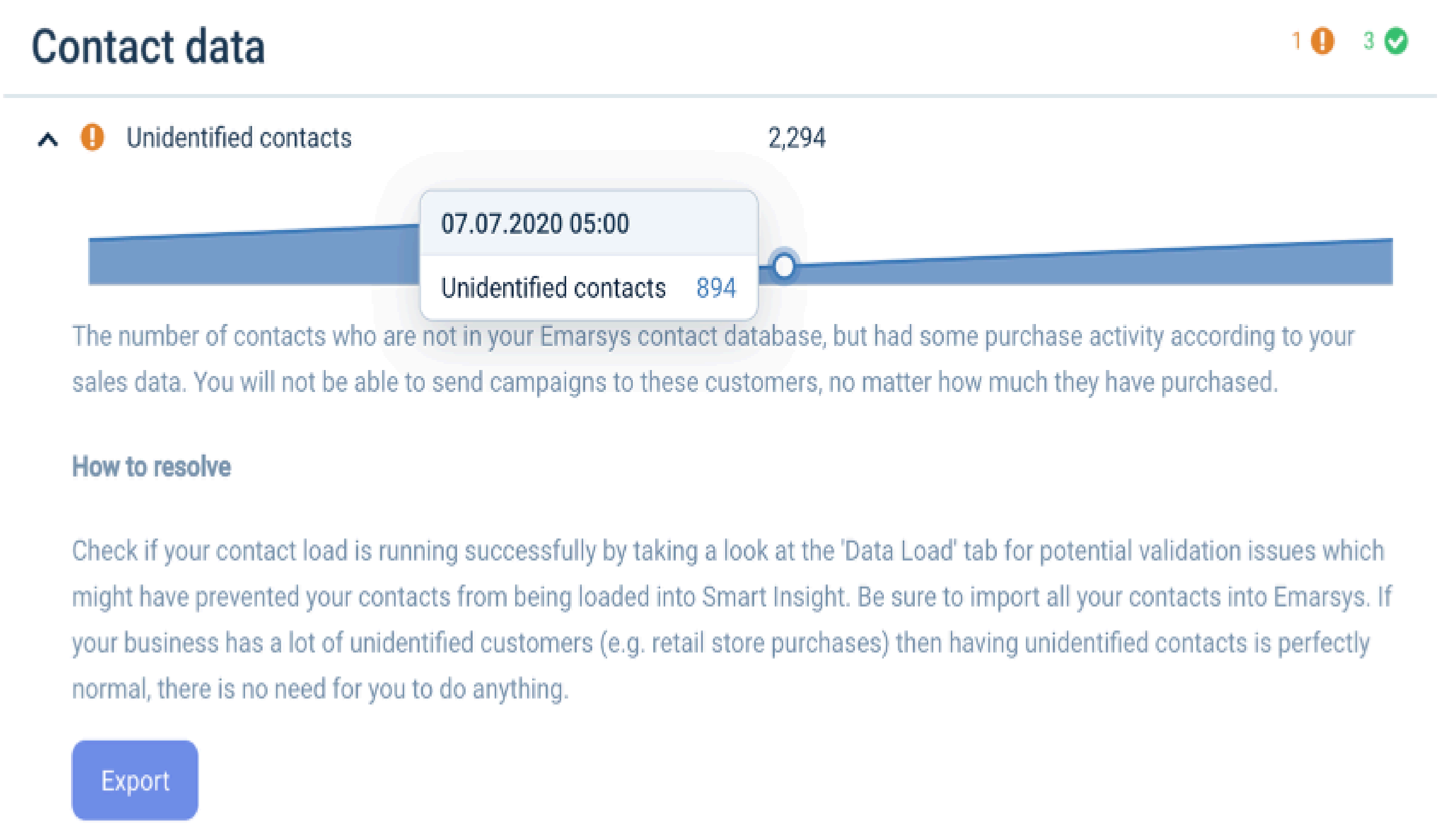
- ☐ *checkmark* - Means that the specific metric is up-to-date and accurate (i.e. the value is below the specified threshold).
- ☐ *exclamation* - Means that the specific metric's threshold has been exceeded.

→ Tip

To display additional information about each metric, expand a specific line by clicking it. Here you can see:

- A chart that shows you how this metric changed in the last 30 days,
- Detailed description of each metric and

- Recommendations describing how you can resolve an issue.



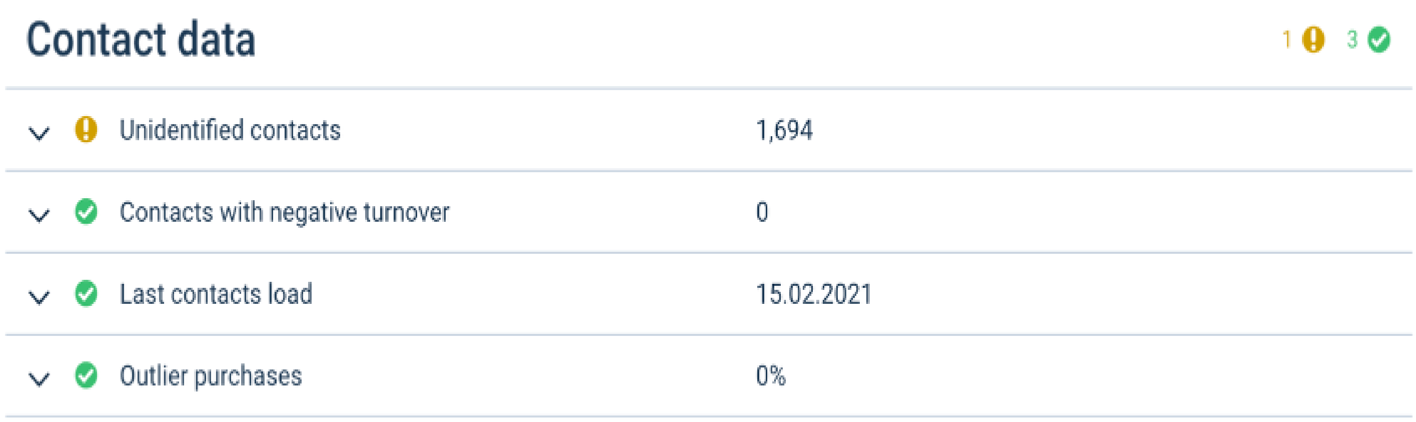
Available sections

The following sections are available on the **Overview** tab:

- Contact Data
- Product Data
- Purchase Data

Contact Data

You can see the following metrics in the **Contact data** section:



- **Last contacts load** - The date of the last successful contact data load.

⚠ **Caution**

If this date is older than 1 day, it means that some of your contacts have corrupted data and your contact load is failing. If contact data cannot be loaded regularly, then contact information will become outdated and you cannot import new contacts into Smart Insight. This could be a possible reason for an increasing number of **Unidentified contacts**.

- **Unidentified contacts** - The number of contacts who have not yet been added to your SAP Emarsys database but who had made purchases according to your sales data.

⚠ Caution

You cannot send campaigns to these customers, regardless of the amount of their purchases.

→ Tip

You can export the data into a .CSV file. To do so, expand the **Unidentified contacts** line and click the **Export** button.

- **Contacts with negative turnover** - The number of contacts whose total lifetime spend is negative, which means that these customers appear to have refunded more items than they have bought.

⚠ Caution

If there is a significant amount of contacts with negative turnover, then Smart Insight may be missing purchase data, which would adversely affect your lifecycle marketing.

→ Tip

You can export the data into a .CSV file. To do so, expand the **Contacts with negative turnover** line and click the **Export** button.

- **Outlier purchases** - The percentage of purchases made by a single customer who has made the most purchases based on your sales data.

⚠ Caution

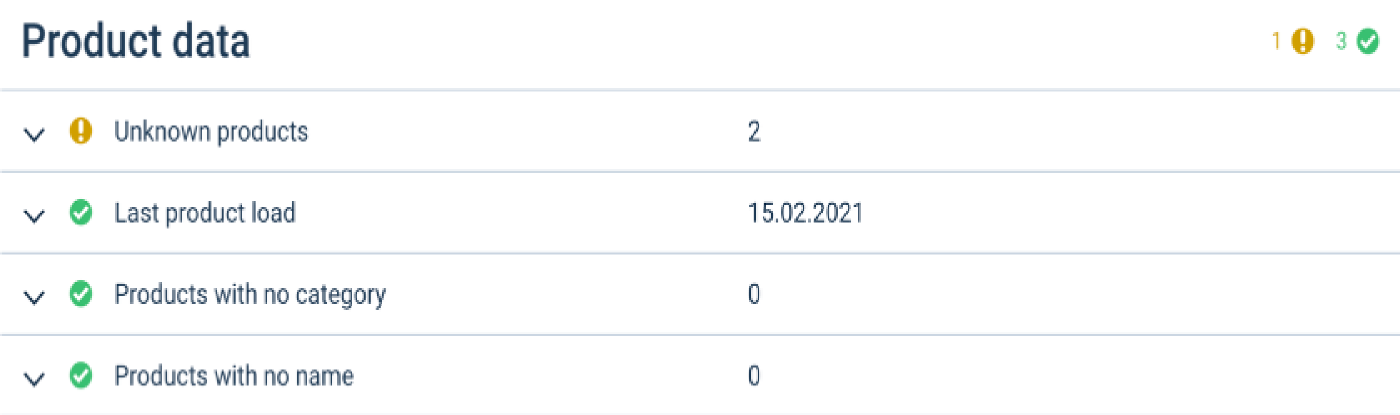
If this percentage is high, it could mean that all **Unidentified purchases** are attributed to the same person, which would distort your analytical reports.

→ Tip

You can export the data into a .CSV file. To do so, expand the **Outlier purchases** line and click the **Export** button.

Product Data

You can see the following metrics in the **Product data** section:



- **Last product load** - The date of the last successful product data load.

⚠ Caution

If this date is older than 1 day, it means that your product load is failing or you are not uploading your catalog to Smart Insight. If product data cannot be uploaded regularly, then product information will become outdated and new products will not be imported into Smart Insight. This could be a possible reason for an increasing number of **Unknown products**.

- **Unknown products** - The number of products that have been sold but are not in the product catalog. These products will be displayed as **Unknown Product** on the Smart Insight reports.

→ Tip

You can export the data into a .CSV file. To do so, expand the **Unknown products** line and click the **Export** button.

- **Products with no category** - The number of products that do not belong to any product category. These products will be displayed as **Missing category** on the reports and you will not be able to filter the customers of these products by category.

→ Tip

You can export the data into a .CSV file. To do so, expand the **Products with no category** line and click the **Export** button.

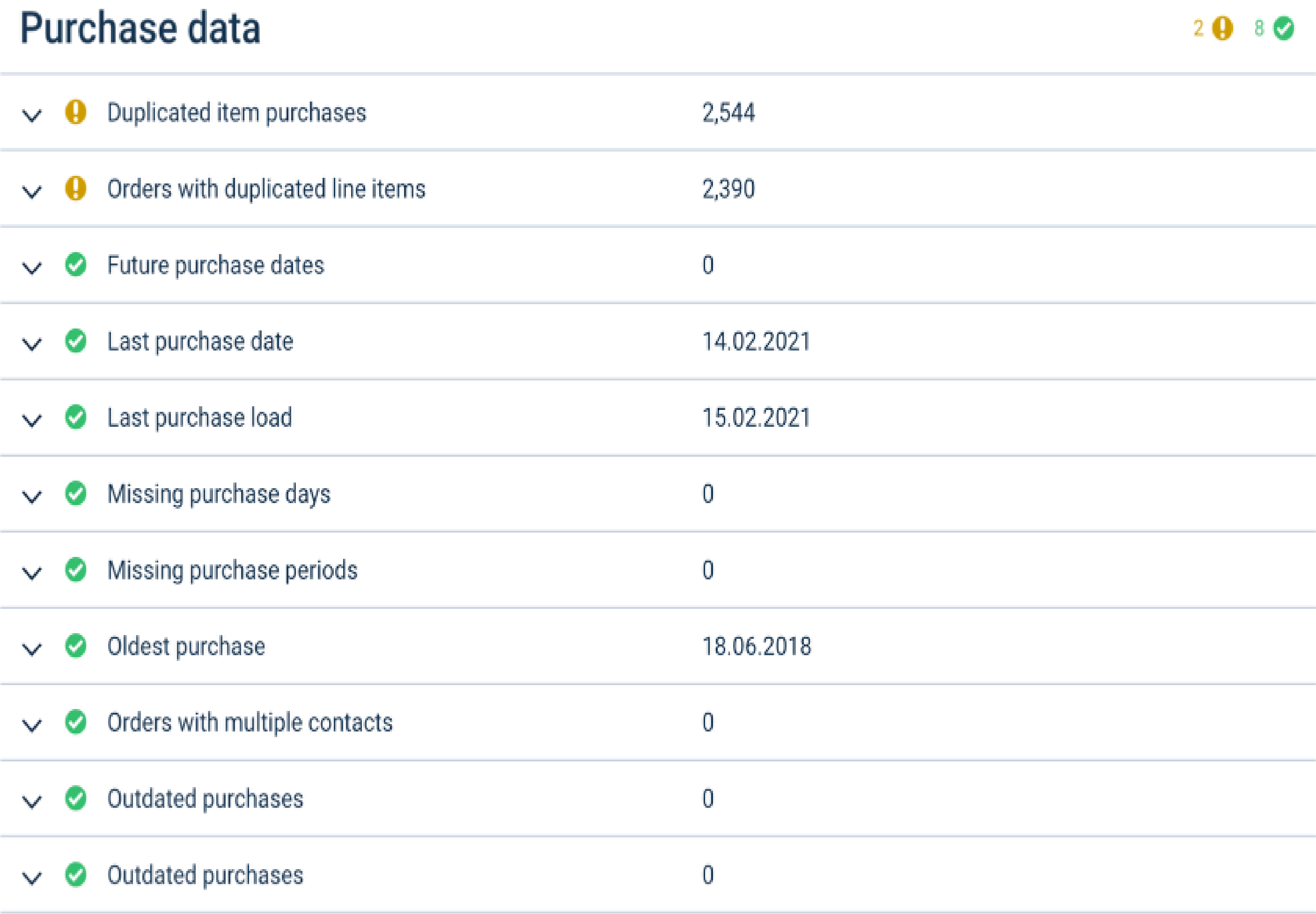
- **Products with no name** - The number of products that have an empty name in the product catalog. These products will appear with an empty label on the reports and you will not be able to filter these products (or their customers) by name.

→ Tip

You can export the data into a .CSV file. To do so, expand the **Products with no name** line and click the **Export** button.

Purchase Data

You can see the following metrics in the **Purchase data** section:



Purchase data 2 8

Duplicated item purchases	2,544
Orders with duplicated line items	2,390
Future purchase dates	0
Last purchase date	14.02.2021
Last purchase load	15.02.2021
Missing purchase days	0
Missing purchase periods	0
Oldest purchase	18.06.2018
Orders with multiple contacts	0
Outdated purchases	0
Outdated purchases	0

- Duplicated item purchases - It means that your sales data file contains duplicate lines with the same `contact ID`, `product ID`, `order ID`, `quantity`, `price` and `purchase date`.

Caution

Importing the same purchases multiple times will distort your lifecycle analytics and buyer status calculations.

Note

Whats the difference between Duplicated item purchases and Orders with duplicated line items?

The metrics Duplicated item purchases and Orders with duplicated line items are closely related:

- Duplicated item purchases counts all lines with the same `contact ID`, `product ID`, `order ID`, `quantity`, `price` and `purchase date` in your sales data file.
- Orders with duplicated line items displays (as described below) the number of orders with duplicate line items having the same `order ID` in your sales data file.

The following sales data excerpt contains 2 Orders with duplicated line item sand 5 Duplicated item purchases:

```
order, timestamp, customer, item, price, quantity
2123, 2022-09-08, abc@sap.com, xyz, 12.00, 2
2123, 2022-09-08, abc@sap.com, xyz, 12.00, 2
3123, 2022-09-20, xzy@sap.com, trw, 32.00, 1
3123, 2022-09-20, xzy@sap.com, trw, 32.00, 1
3123, 2022-09-20, xzy@sap.com, trw, 32.00, 1
```

Tip

You can export the data into a .CSV file. To do so, expand the **Duplicated item purchases** line and click the **Export** button.

- **Last purchase load** - The date of the last successful purchase data load.

⚠ Caution

If this date is older than 1 day, it means that your purchase load is failing or you are not uploading your sales files to Smart Insight. If sales data cannot be loaded regularly, then customer lifecycle information will become outdated, which affects both your analytics and marketing activity.

- **Latest purchase date** - The date of the most recent purchase.

⚠ Caution

If your latest purchase is more than 2 days old and you are uploading daily sales files, then your purchase load might be failing.

- **Oldest purchase** - The date of the oldest purchase.

⚠ Caution

Smart Insight lifecycle calculations are optimized to be run on at least 2 years' worth of purchase history, otherwise your lifecycle analytics might not be accurate.

- **Orders with duplicated line items** - It means that your sales data file contains duplicate line items with the same order ID. This metric groups duplicate line items by their order IDs. For example, if you have two identical line items with the same order ID, it will count as one order with duplicate line items.

⚠ Caution

Importing the same orders multiple times will distort your lifecycle analytics and buyer status calculations.

→ Tip

You can export the data into a .CSV file. To do so, expand the **Orders with duplicated line items** line and click the **Export** button.

- **Future purchase dates** - The number of purchases that have a purchase date in the future.

⚠ Caution

These purchases can distort your analytics results.

→ Tip

You can export the data into a .CSV file. To do so, expand the **Future purchase dates** line and click the **Export** button.

- **Missing purchase days** - The number of individual days when no purchases were made. Missing days in purchases mean that either you have not uploaded any sales data for those days or Smart Insight could not load your uploaded files.

⚠ Caution

Missing purchases have the potential to render your customer lifecycle modelling incorrect and thus, adversely affect your lifecycle marketing.

→ Tip

You can export the data into a .CSV file. To do so, expand the **Missing purchase days** line and click the **Export** button.

- **Missing purchase periods** - The number of time periods (one or more consecutive calendar days) when no purchases were made according to the sales data in Smart Insight. Missing periods in purchases mean that either you have not uploaded any sales data for that period or Smart Insight could not load your uploaded files.

⚠ Caution

Missing purchases have the potential to render your customer lifecycle modelling incorrect and thus, adversely affect your lifecycle marketing.

→ Tip

You can export the data into a .CSV file. To do so, expand the **Missing purchase periods** line and click the **Export** button.

- **Orders with multiple contacts** - The number of orders that occur in the purchase history of multiple contacts at the same time. Smart Insight expects each order to have been placed by one person only.

⚠ Caution

If multiple people share the same order, then customer lifecycle modelling will be incorrect, which will adversely affect your lifecycle marketing and revenue impact reporting.

→ Tip

You can export the data into a .CSV file. To do so, expand the **Orders with multiple contacts** line and click the **Export** button.

- **Outdated purchases** - Purchases that were made before the year 2000.

⚠ Caution

Purchases this old might distort your analytics results and are irrelevant for Smart Insight lifecycle calculations.

→ Tip

You can export the data into a .CSV file. To do so, expand the **Outdated purchases** line and click the **Export** button.

The Data Loads Tab

i Note

- To open the **Data Loads** tab, go to **Management > Smart Insight Data Quality > Data Loads**.
- If you are using our Batch Sales Data Load solution, then you can check your sales data loads on the Load Overview tab under **Management > Sales Data Batch Loads**.

What is the Data Loads tab?

The **Data Loads** tab shows the status of your scheduled automatic loads and all your successful and unsuccessful **contact**, **product** and **purchase** file uploads for the last 30 days.

i Note

If the cumulative size of the files you upload in one occasion exceeds 10 GB, please notify SAP Emarsys Support as these files need special attention from our side.

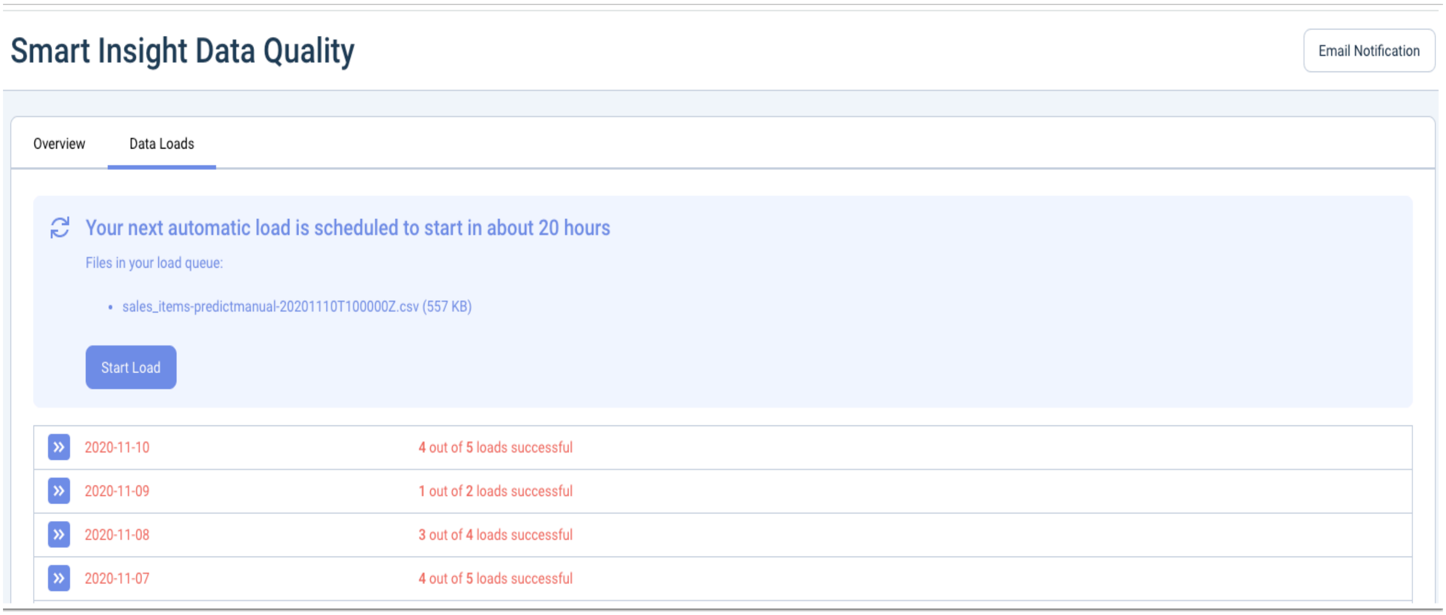
→ Tip

For the proper operation of Smart Insight you must upload on a daily basis the most recent contact, product and purchase data.

⚠ Caution

Please consider our file maintenance policy that came into effect in October 2021:

- **For clients using the automatic daily load feature**: files that are not loaded into Smart Insight and older than 7 days will be deleted.
- **For clients not using the automatic daily load feature**: files that are not loaded into Smart Insight and older than 30 days will be deleted.

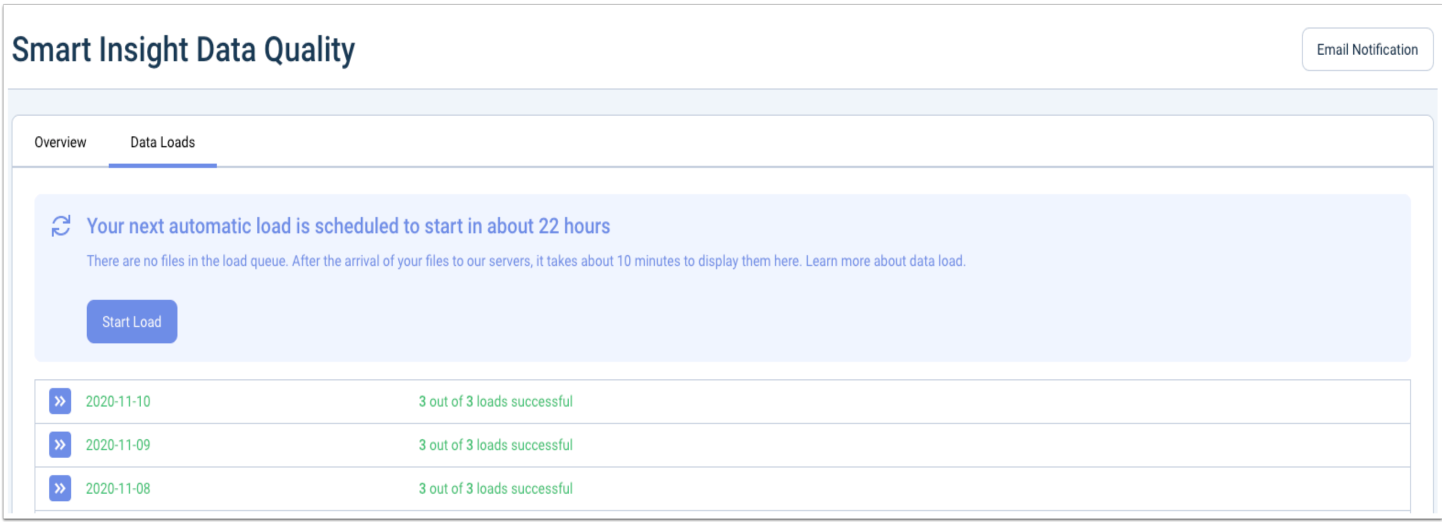


No automatic data load set up

When your Smart Insight implementation is nearly ready, the **Data Loads** tab of your account shows a state when there is no automatic load set up and there is no file uploaded by you to the SFTP server.

Automatic load set up without a file

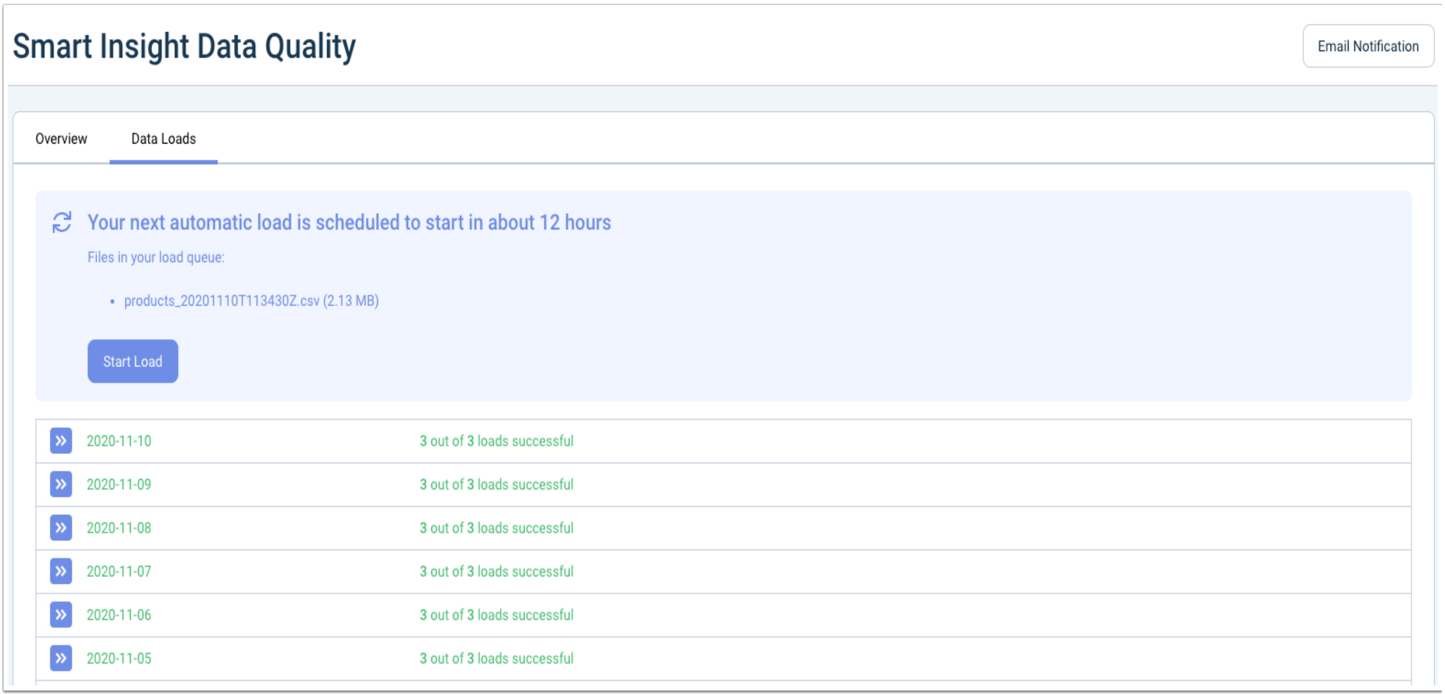
By the time your Smart Insight implementation has been finished, we have scheduled an automatic upload for you.



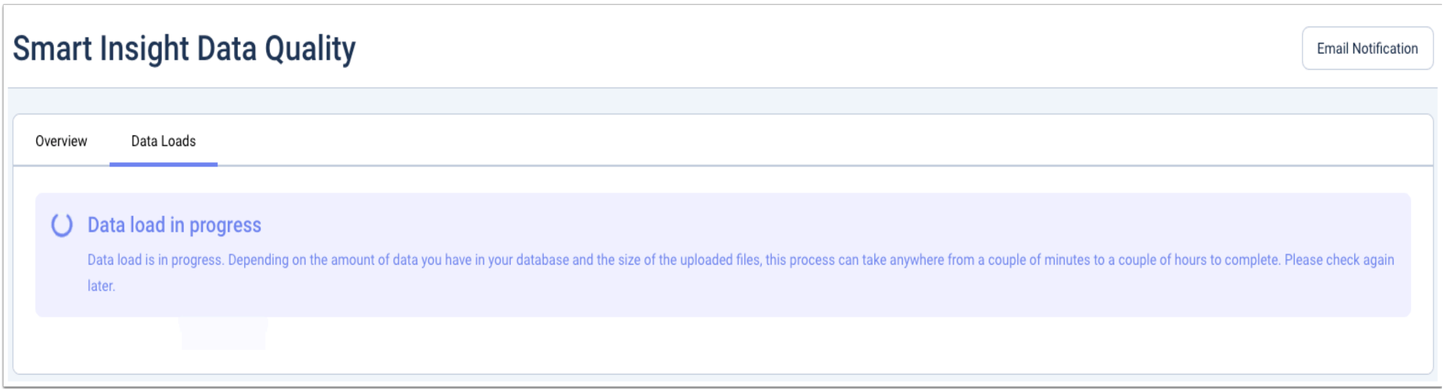
At this point your task is to upload the data of contacts, products and purchases to the SFTP server. See the Smart Insight FAQ for more information on their requirements.

Automatic load set up with a file

When all set, the screen shows a state when there is an upload scheduled and there is a file available on the SFTP server.



At this point you can click the **Load Now** button to start the upload immediately. The screen will show the status of your upload, with the messages indicating possible errors.



For more information on the possible reasons, see Validation Error Messages.

Data Loads history states

The upload history elements are color-coded:

- Green denotes a successful upload.
- Yellow denotes a missing upload for the specified day.
- Red denotes one or more unsuccessful file uploads.

Click an entry to expand it and see details of why an upload failed. For more information on the possible reasons, see Validation Error Messages.

Sending email notifications

You can subscribe to email notifications that you will receive when there is a new Smart Insight data quality warning or a data load error occurs in your daily load.

i Note

For more information, see Sending email notifications.

Validation Error Messages

You can find the validation error messages related to data loads on this page.

- **<Field> is an invalid date.**

  The format of a specific field can be defined during SI implementation. If this message is shown, the date format is invalid or it is not provided at all.

- **<Field> is an invalid float.**

  During the implementation process, the decimal separator is defined. If the field has another type of decimal separator, this error message is displayed. Please note here that thousand separators (i.e. `1,000`) cannot be used.

- **<Field> is an invalid integer.**

  When a field is defined as an integer and it is a mandatory field, this message is shown when it contains a string or it is empty. If a field is not mandatory and is empty, it will be loaded to the database without an error. However, if it is a string, this will also generate this error.

- **<Field> is missing.**

  The value is missing for a field.

- **<Field> contains newline or null character.**

  The `.csv` file can not contain newline (`\n`) or null(`\x00`) characters, either unquoted or quoted, in the fields.

- **Missing or stray quote.**

  The escape character for the quote symbol (`"`) can be set. The default is a double quote: `"`, e.g., `""Hello!""` will be displayed as `"Hello!"`. If the proper escape characters are not used (e.g., `/"Hello!/"`), or these are not used at all (e.g., `"Hello!"`), this message is displayed.

- **Line breaks were inconsistent or incorrectly specified.**

  The file has line breaks which are different than the accepted style, or it consistently has different line breaks (e.g., it is defined as a Windows line break but the file contains Linux ones). Windows (CR LF), and Linux (LF) line breaks are accepted. Mac line break is not accepted (CR).

- **Illegal quoting.**

  The quote symbol which encloses a value is not in its proper place, e.g., it is in the middle of a word.

- **Row contains an unclosed quote.**

  The number of quote symbols is not correct in a row, i.e. a value has only one or three or more enclosing quotes instead of two.

- **Encoding error when parsing row, e.g. because of invalid characters.**

  This message is shown when the file contains characters with invalid encoding. For example, if the file was defined as UTF-8, no characters with different encoding types are accepted.

- **More than 1000 errors were found.**

  The `.csv` file contains more than 1,000 errors, so the checking process was terminated. If you see this message, it means that your `.csv` file was heavily corrupted and there were too many errors to display. Please check that your upload files comply with our CSV Guidelines.

Smart Insight Settings

On the **Smart Insight Settings** page, you can check your Smart Insight configuration. You can find the **Smart Insight Settings** page under the **Management** menu.

i Note

To change the Smart Insight Settings, click the **Edit** button on the bottom of this page. For more information, see Modifying your Smart Insight Settings.

→ Tip

As a quick reminder, here is the onboarding video about **Smart Insight Settings:**

Disclaimer: The below video is not part of the SAP product documentation. Please read the legal disclaimer for video links before viewing this video.

Onboarding video - Smart Insight (3/3) Revenue Impact, Data Quality, Data Settings and Store Reporting

03:06

SAP Emarsys

Available tabs

The following tabs are available on the **Smart Insight Settings** page:

- The eRFM Parameters Tab
- The Contact Fields Tab
- The Product Fields Tab
- The Purchase Fields Tab
- The Store Fields Tab

- The FTP Account Tab
- The Advanced Tab

The eRFM Parameters Tab

Your eRFM parameter settings that are used by Smart Insight for customer lifecycle categorization are displayed on the **eRFM Parameters** tab.

Smart Insight categorizes customer lifecycles by matching the behavior of your contacts to the parameters shown here. The eRFM parameters should match your business model and objectives.

The following information is displayed on this tab:

- **General Settings**:
  - **Currency** - The selected currency that is shown on the Customer Lifecycle Dashboard and metrics.

    Note

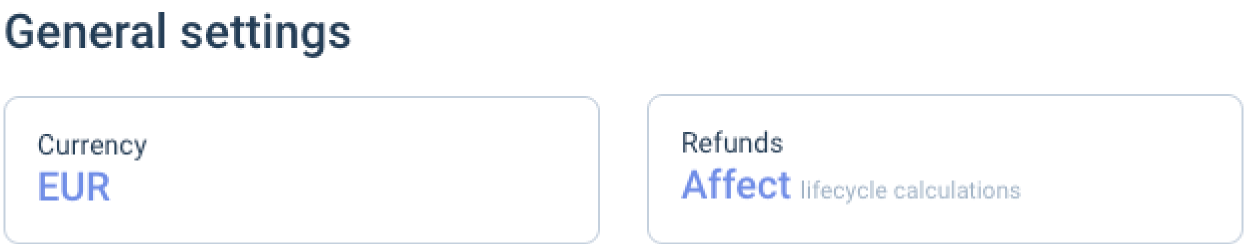
    The currency shown here is not identical with the base currency of your account.

  - **Refunds** - This setting determines whether fully refunded purchases affect lifecycle calculations. For example, if it is turned on, then a First-time buyer whose purchase has been refunded will revert to a Lead. If it is turned off, then this customer will stay a First-time buyer.

    Note

    The Refunds affect lifecycle calculations option and orders with 0 sales amount:

    - Regardless of whether the **Refunds affect lifecycle calculation** option is turned on or off, orders with 0 sales amount will not affect the Customer Lifecycle calculations.
    - If the **Refunds affect lifecycle calculation** option is turned on, then refunds will affect the number of orders, except for orders with 0 sales amount.



- **Unidentified contacts** - You can check whether or not your lifecycle calculations contain purchases made by non-identified contacts.
- **New store interval** - After your stores were opened, they will be regarded as new during this period.

  Note

  The fields **Unidentified contacts** and **New store interval** are currently on Pilot release for **Retail** clients only. If you are interested in participating in the Pilot phase, please speak to your Success Manager.

Unidentified contacts
Included in lifecycle calculations

New store interval
180 days

- **Lead Lifecycle Status** - Leads are categorized as contacts who have not yet made a purchase. Here you can see your **Cold lead limit** and **Inactive lead limit**. Your leads are divided into four categories based on these values:
  - **New lead**, **Active lead**, **Cold lead** and **Inactive lead**. For more information, see Lead Lifecycle Status.

Lead lifecycle status

Cold lead limit
90 days

Inactive lead limit
180 days

New lead	Has never clicked a link (excluding opt-in) or visited the website, and has registered in the last 90 days.
Active lead	Visited the site or clicked a link in the last 90 days.
Cold lead	Visited the site, clicked a link or registered more than 90 but less than 180 days ago.
Inactive lead	Visited the site, clicked a link or registered more than 180 days ago.

- **Customer Lifecycle Status** - Smart Insight divides your customers into the following five categories based on your **Defecting recency limit** and **Inactive recency limit**:
  - **Lead**, **First-time buyer**, **Active customer**, **Defecting customer** and **Inactive customer**. For more information, see Customers by lifecycle stage.

Customer lifecycle status

Defecting recency limit
100 days

Inactive recency limit
390 days

Lead	Registered user but has yet to make a purchase.
First-time buyer	Made only one purchase, and it was made in the last 100 days.
Active customer	Made more than one purchase. The last purchase was made in the last 100 days.
Defecting customer	Has purchased before, and the last purchase was made more than 100, but less than or equal to 390 days ago.
Inactive customer	Has purchased before, but has not made a purchase for more than 390 days.

- **Buyer Status** - Smart Insight determines the **Buyer Status** of your customers based on how much money they spent during the **Monetary interval** set. Your customers are divided into five **Buyer Status** categories:
  - **Low spender**, **Normal**, **Silver**, **Gold** and **Platinum**. For more information, see Customers by buyer status.

Buyer status

Monetary interval
730 days

Low spender	Spent less than 140 EUR in the last 730 days.
Normal	Spent 140 EUR or more but less than 400 EUR in the last 730 days.
Silver	Spent 400 EUR or more but less than 930 EUR in the last 730 days.
Gold	Spent 930 EUR or more but less than 2200 EUR in the last 730 days.
Platinum	Spent 2200 EUR or more in the last 730 days.

The Contact Fields Tab

Your contact field settings that were configured during the Smart Insight onboarding process are displayed on this tab:

Contact field references

Unique identifier
email

Date of registration
first registration

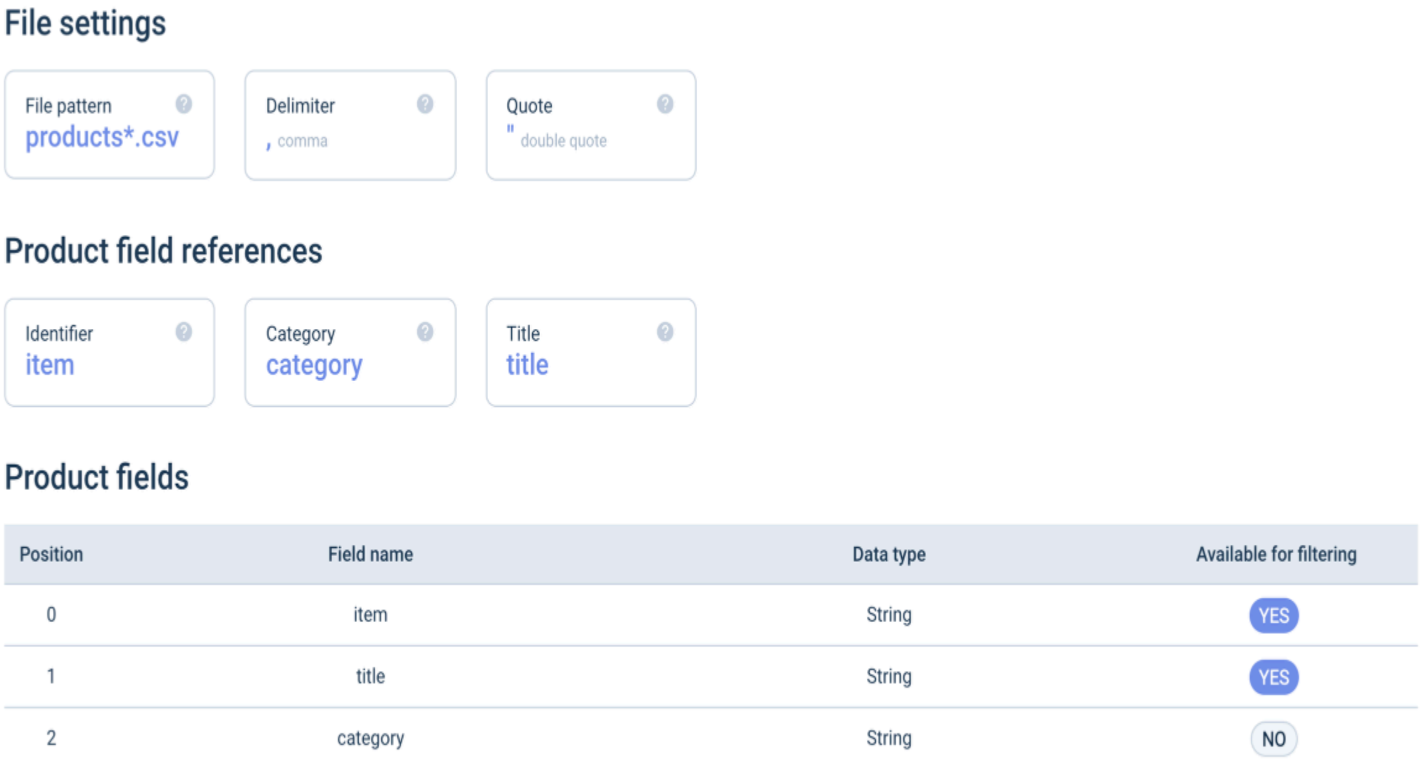
Contact fields

Field name	Data type
email	String
first registration	Date
predict last session date	Date

- **Unique identifier** - The field that you use for linking your contacts to their purchases. The values in this column will be matched to the contact identifier field values in your uploaded sales data files.
- **Date of registration** - The field used for storing the registration date of your customers.
- **Contact Fields** - The fields used for filtering your Smart Insight reports and for creating contact segments.

The Product Fields Tab

Your product field settings that were configured during the Smart Insight onboarding process are displayed on this tab:



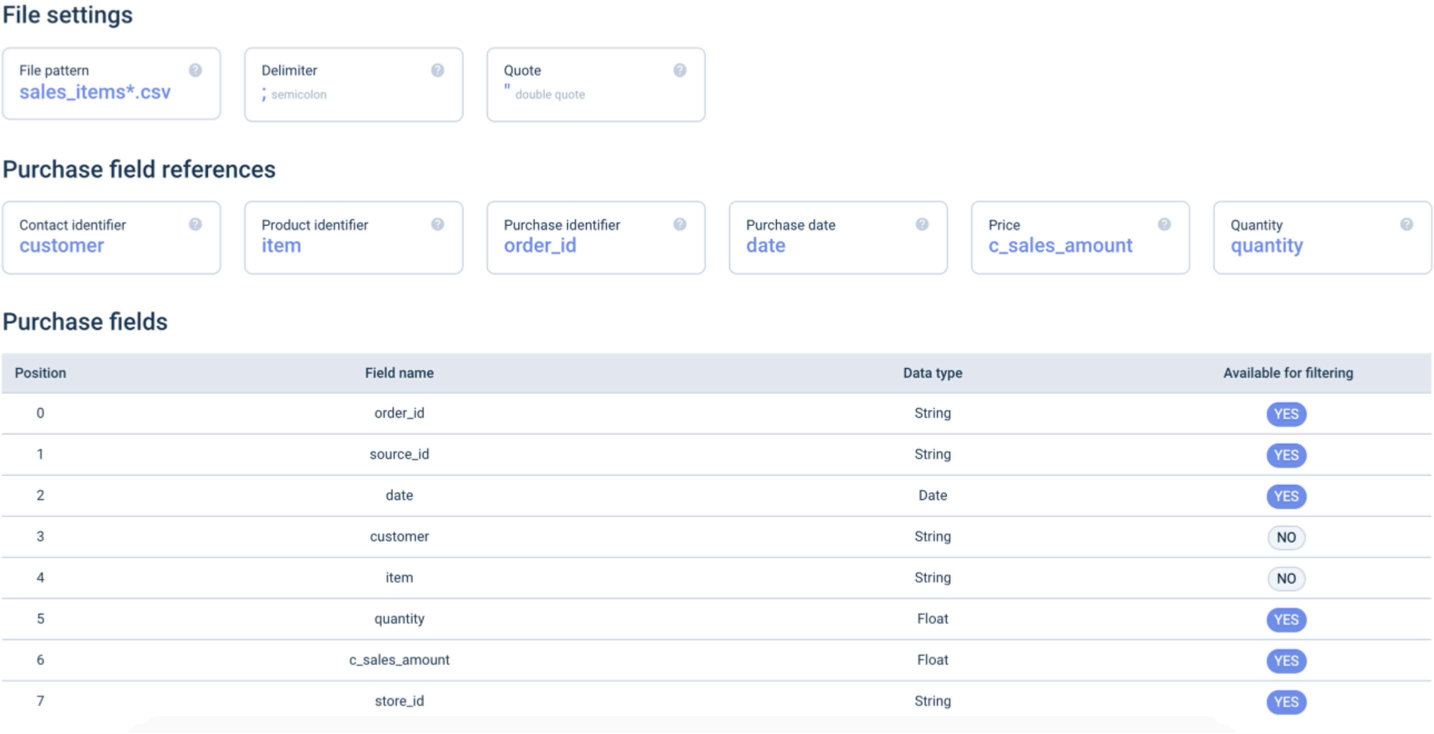
- **File Settings:**
    - **File Pattern** - The file name pattern used by Smart Insight when searching for uploaded product data files.
    - **Delimiter** - The character that divides the fields in your uploaded product data CSV file. (Traditionally, it is a comma.)
    - **Quote** - The character that is used to enclose field values in your CSV file that contain the delimiter character.
- **Product Field References:**
    - **Identifier** - The field that is used to identify your products and link them to purchases. The values in this column will be matched to the product identifier field values in your uploaded sales data files.
    - **Category** - The field that contains the product category information.
    - **Title** - The field that contains the product name.
- **Product Fields** - Here you can see the **Position**, **Field name**, **Data Type** of your product fields and if they are **Available for filtering**.

The Purchase Fields Tab

i Note

This tab is not available if you are using our [Batch Sales Data Load] solution. In this case, you can check your sales data loads and data quality notifications on the **Management** > [Sales Data Loads] page.

Your purchase field settings that were configured during the Smart Insight onboarding process are displayed on this tab:



Position	Field name	Data type	Available for filtering
0	order_id	String	YES
1	source_id	String	YES
2	date	Date	YES
3	customer	String	NO
4	item	String	NO
5	quantity	Float	YES
6	c_sales_amount	Float	YES
7	store_id	String	YES

- File Settings:
  - File Pattern - The file name pattern used by Smart Insight when searching for uploaded sales data files.
  - Delimiter - The character that divides the fields in your uploaded sales data CSV file. (Traditionally, it is a comma.)
  - Quote - The character that is used to enclose field values containing the delimiter character in your CSV file.
- Purchase Field References:
  - Product Identifier - The field that is used to identify your products and link them to purchases. The values in this column will be matched to the product identifier field values in your uploaded product catalog files.
  - Purchase Identifier - The field that is used to identify your orders.
  - Purchase Date - The field that contains the date of your purchases.
  - Contact Identifier - The field that is used to identify your contacts and link them to purchases. The values in this column will be matched to the external identifier field values specified in Contact Fields.
  - Price - The field that contains the sales amount of each purchase.
  - Quantity - The field that contains the quantity of the products sold in each sales line item.
  - Sales Channel - The field that contains the sales channel of the products sold in each sales line item. Currently, only "offline" and "online" sales channels are supported.
  - Store Identifier - The field that is used to identify your stores and link them to purchases. The values in this column will be matched to the store identifier field values in your uploaded store data files.

    i Note

    The Sales Channel and Store Identifier field references are currently on Pilot release for Retail clients only. If you are interested in participating in the Pilot phase, please speak to your Success Manager.
- Purchase Fields - Here you can see the Position, Field name, Data Type of your purchase fields and if they are Available for filtering.

The Store Fields Tab

i Note

If you are interested in learning more about SAP Emarsys Retail, please contact your Client Success Manager.

Your store field settings that were configured during the Smart Insight onboarding are displayed on this tab.

File settings

File pattern
store*.csv

Delimiter
, comma

Quote
" double quote

Store field references

Store identifier
store_id

Store name
name

Open date
open_date

Country code
country_code

City
city

Address
address

Postal code
postal_code

Latitude
latitude

Longitude
longitude

Size
size

Store category
category

Store fields

Position	Field name	Data type	Format	Available for filtering
1	store_id	String		YES
2	name	String		YES
3	open_date	Date	%Y-%m-%d	YES
4	country_code	String		YES
5	city	String		YES
6	address	String		YES
7	postal_code	String		YES
8	latitude	Float	Separate decimals with "."	YES
9	longitude	Float	Separate decimals with "."	YES
10	size	Float	Separate decimals with "."	YES
11	category	String		YES

Here you can see the following fields:

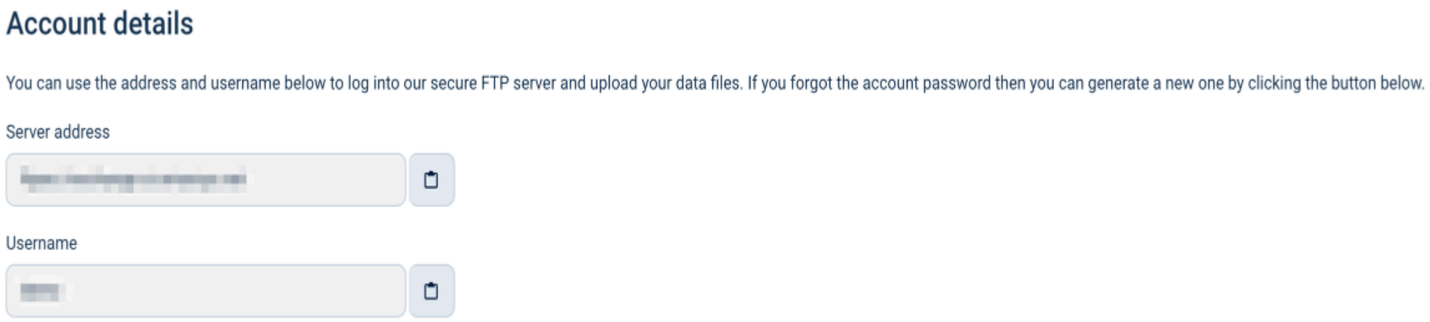
- File settings:
  - File pattern - The file name pattern used by Smart Insight when searching for uploaded store data files.
  - Delimiter - The character that divides the fields in your uploaded store data CSV file. (Traditionally, it is a comma.)
  - Quote - The character that is used to enclose field values containing the delimiter character in your CSV file.
- Store field references:
  - Store identifier - The field that is used to identify your stores and link them to purchases. The values in this column will be matched to the store identifier field values in your uploaded sales data file.
  - Store name - The field that contains the name of the stores.
  - Open date - The field that contains the date when your stores were opened.
  - Country code - The field that contains the country or region code of the stores.
  - City - The field that contains the city where your stores are located.
  - Address - The field that contains the address of your stores.
  - Postal code - The field that contains the postal code of your stores.
  - Latitude - The field that contains the latitude of your stores' GPS coordinates.
  - Longitude - The field that contains the longitude of your stores' GPS coordinates.
  - Size - The field that contains the size of the stores.
  - Store category - The field that contains the store category information.

- **Store fields** - Here you can see the **Position**, **Field name**, **Data type** and **Format** of your store fields and if they are **Available for filtering**.

The FTP Account Tab

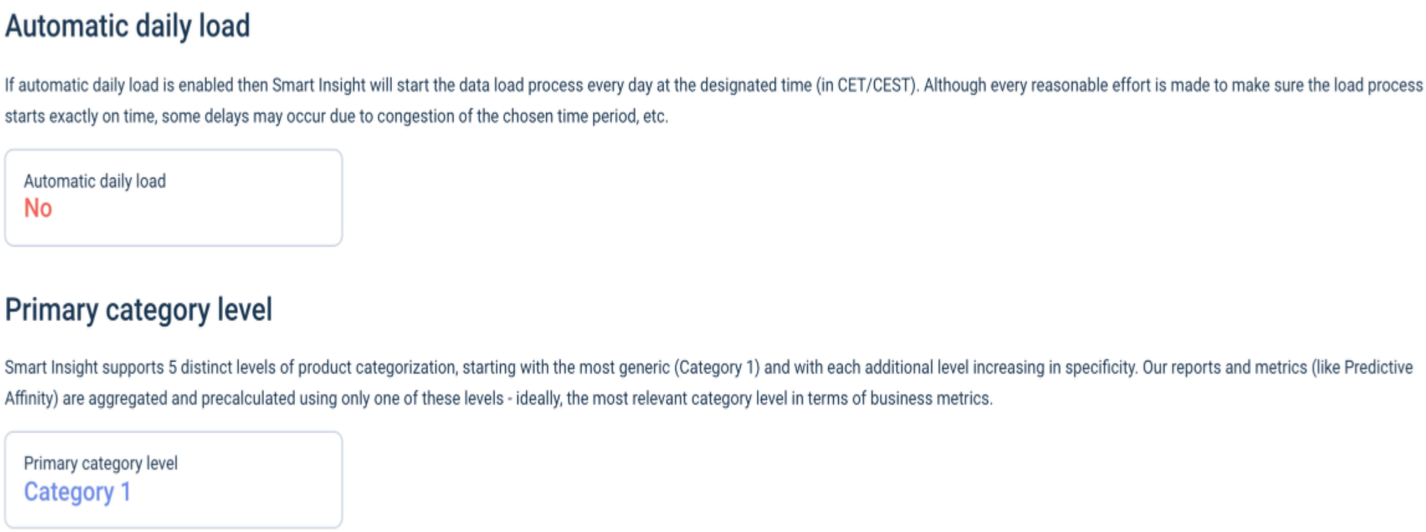
Your **Server address** and **Username** that are used to log into our secure FTP server and upload your data files are displayed on this tab.

You can also copy these values by clicking the *e-clipboard* icon.



The Advanced Tab

Your **Automatic Daily Load** and **Primary Category Level** settings that were configured during the Smart Insight onboarding process are displayed on this tab:



- **Automatic Daily Load** - The time (time zone is CET/CST) when the **Automatic Daily Load** starts if it is enabled.

  ⚠ **Caution**

  Delays may occur due to congestion during the selected time period.

- **Primary Category Level** - The selected **Primary Category Level**. Smart Insight supports 5 distinct product category levels. Our reports and metrics are aggregated and precalculated based on the selected level.

i Note

We recommend selecting the second product category level as the default **Primary Category Level**, except in the following cases:

- If you have only one product category level, then select that one.
- If another product category level meets your requirements better than the second level, then select that one.

Modifying your Smart Insight Settings

On the **Management** > **Smart Insight Settings** page, you can modify the configurations that you set up during the Smart Insight onboarding process.

Note

- Only **BI Administrators** can access Smart Insight. You can edit your Smart Insight Settings only if the **Access Settings** toggle is activated under **Management** > **User Management** > **Roles**.
- If your user role is different than **BI Administrator**, then you can check your Smart Insight configuration but cannot modify it.

You can make the following changes on the **Smart Insight Settings** page:

- Modify the eRFM parameters
- Reset the contact fields
- Reset the product data file
- Reset the purchase fields
- Reset the store fields
- Regenerate your FTP account password
- Modify the Advanced settings

Reloading all customer data

Note

Before you start reloading your customer data, please make sure you read and understand the process and its impact as described in Reloading data into Smart Insight.

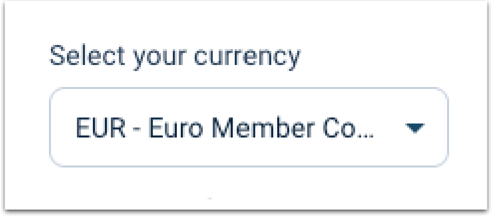
Modifying the eRFM Parameters

Procedure

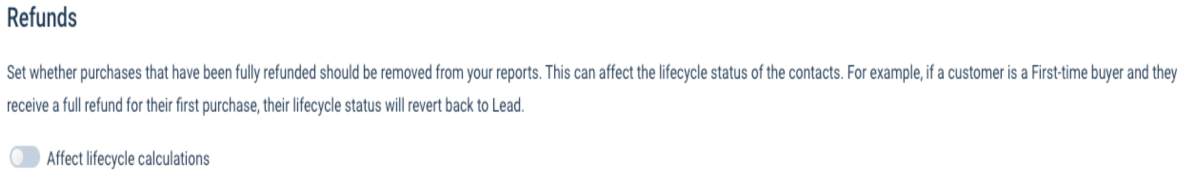
1. To modify the settings of your eRFM parameters, click **Edit**. You can change the following settings:
    - **General Settings** - Here you can modify the following values:
        - **Select your currency** - Here you can modify your currency.

          Note

          The currency that you specify here is not identical with the base currency of your account.



- **Refunds** - This setting determines whether purchases that have been fully refunded should be removed from your reports. This can affect the lifecycle status of your contacts. For example, if a customer is a First-time buyer, then their lifecycle status will revert back to Lead after receiving a full refund.



- **Unidentified purchases** (Unidentified contacts) - You can exclude purchases made by unidentified contacts from your lifecycle reports by switching this toggle.

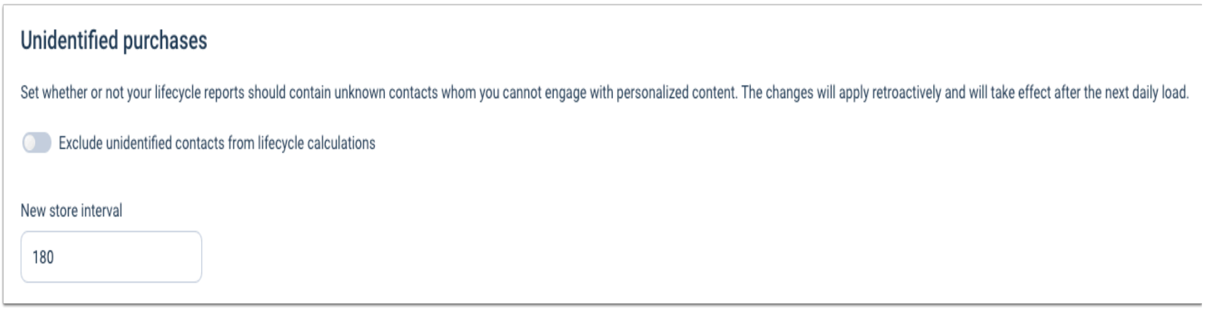
  i Note

  The changes will apply retroactively and take effect after the next daily load.

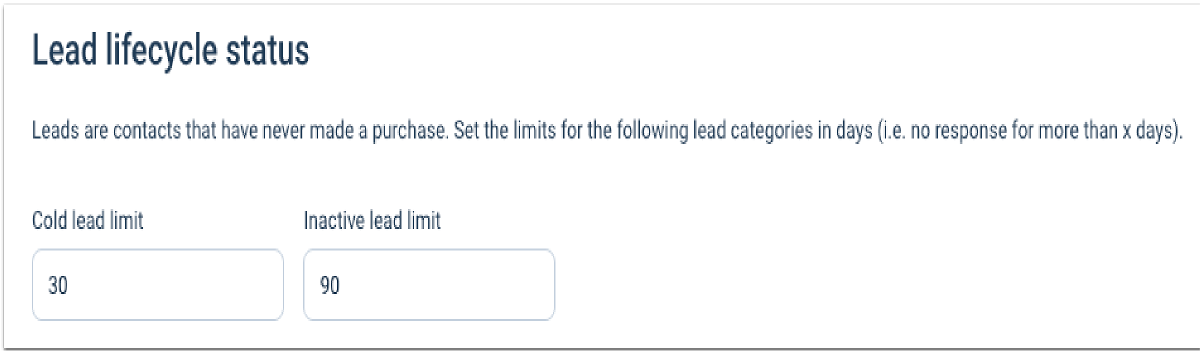
- **New store interval** - After your stores were opened, they will be regarded as new during this period.

  i Note

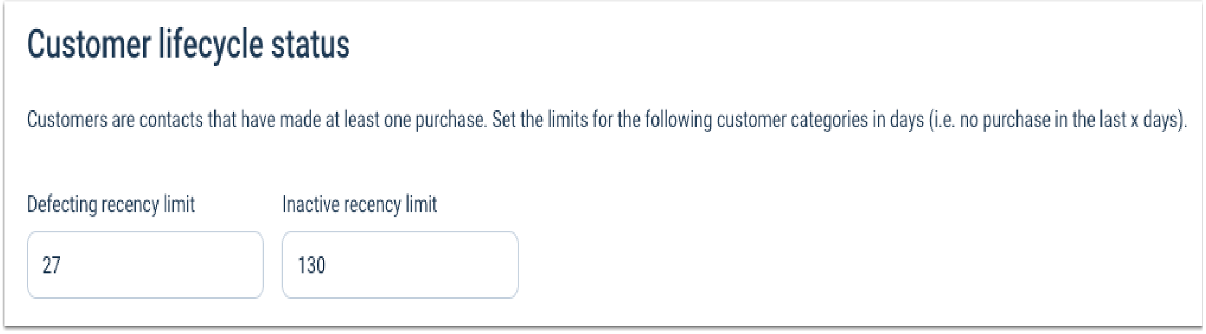
  The fields **Unidentified purchases** and **New store interval** are available to **Emarsys Retail** clients only. If you are interested in learning more about **Emarsys Retail**, please contact your Client Success Manager.



- **Lead Lifecycle Status** - Here you can modify the following values:
  - **Cold lead limit** - The interval after which an Active lead becomes a Cold lead.
  - **Inactive lead limit** - The interval after which a Cold lead becomes an Inactive lead.



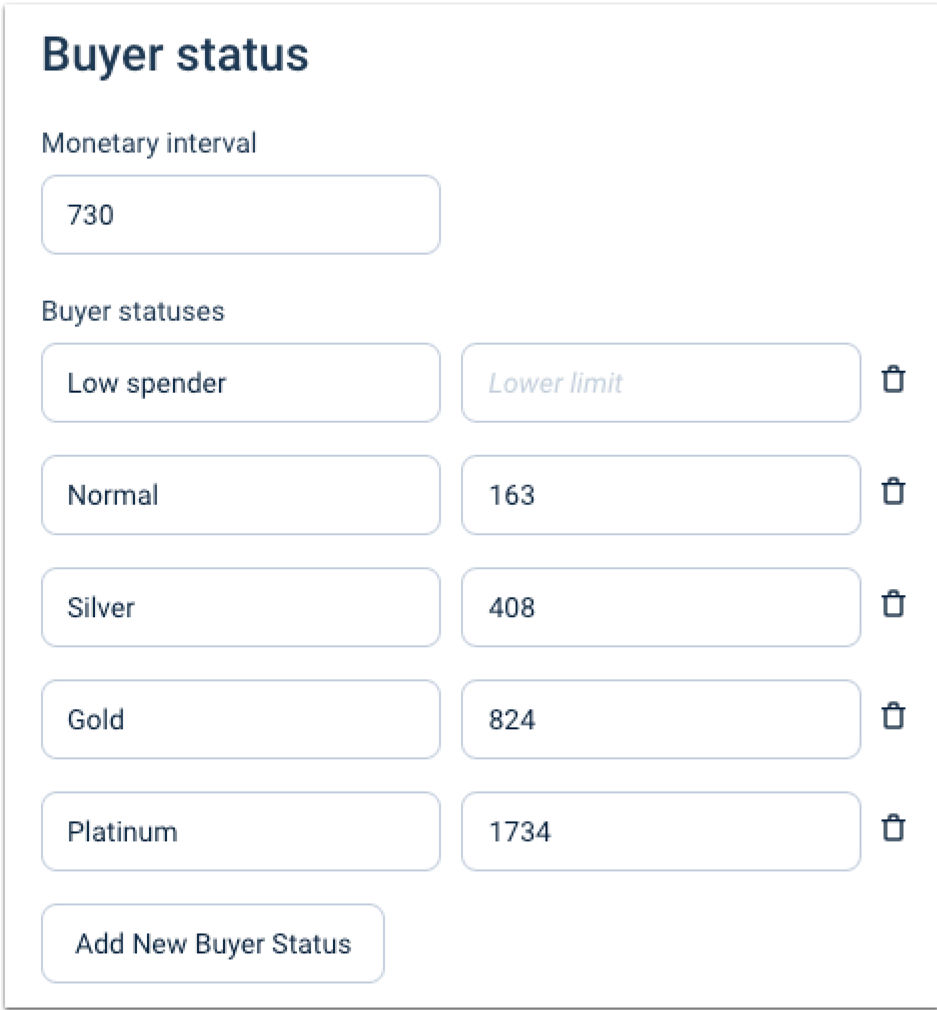
- **Customer Lifecycle Status** - Here you can modify the following values:
  - **Defecting recency limit** - The interval after which a First-time buyer or Active customer becomes a Defecting customer.
  - **Inactive recency limit** - The interval after which a Defecting customer becomes an Inactive customer.



- **Buyer Status** - Here you can modify the following values:
  - **Monetary interval** - The **Buyer status** of your contacts will be determined based on the purchases they made during this time range.
  - **Buyer statuses** - These are determined based on how much money your contacts spent during the specified **Monetary interval**.

  You can also perform the following actions:
  - You can rename already existing **Buyer statuses**. For example, you can rename the status Platinum to Power buyer.
  - To define a new **Buyer status**, click **Add new buyer status**.

    To remove a **Buyer status**, click *trash* .



2. To finalize your changes, click **Save**.

Resetting the Contact Fields

Prerequisites

Before resetting your contact fields, make sure you read and understand the process and its impact as described below, and are prepared to make the necessary changes.

⚠ Caution

Resetting your contact fields is an invasive operation that can severely impact your scheduled campaigns and automated programs.

Setting up the new contact fields is followed by an automatic process that involves the following:

1. Recreating your contact table in the database. Data from fields that did not change (i.e. that were present in the original configuration with the same name and data type) will be copied over. There are two possible scenarios:

- If you only want to delete some fields from the contact file configuration, then a daily load is not necessary, your contact data will be complete and available for segmentation.
- If new fields are added, then those are created in the database with empty values by default. To make your contact data complete and available for segmentation again, a daily load is necessary.

2. Updating the contact attributes available for creating Smart Insight segments to reflect the changes. If a Smart Insight segment references a contact attribute which has been deleted, the segment will fail. Please check all such segments and update them accordingly.

Procedure

1. To modify your contact fields, click **Reset**.
2. You can modify the following fields:
    - **Unique identifier**

      ### ⚠ Caution

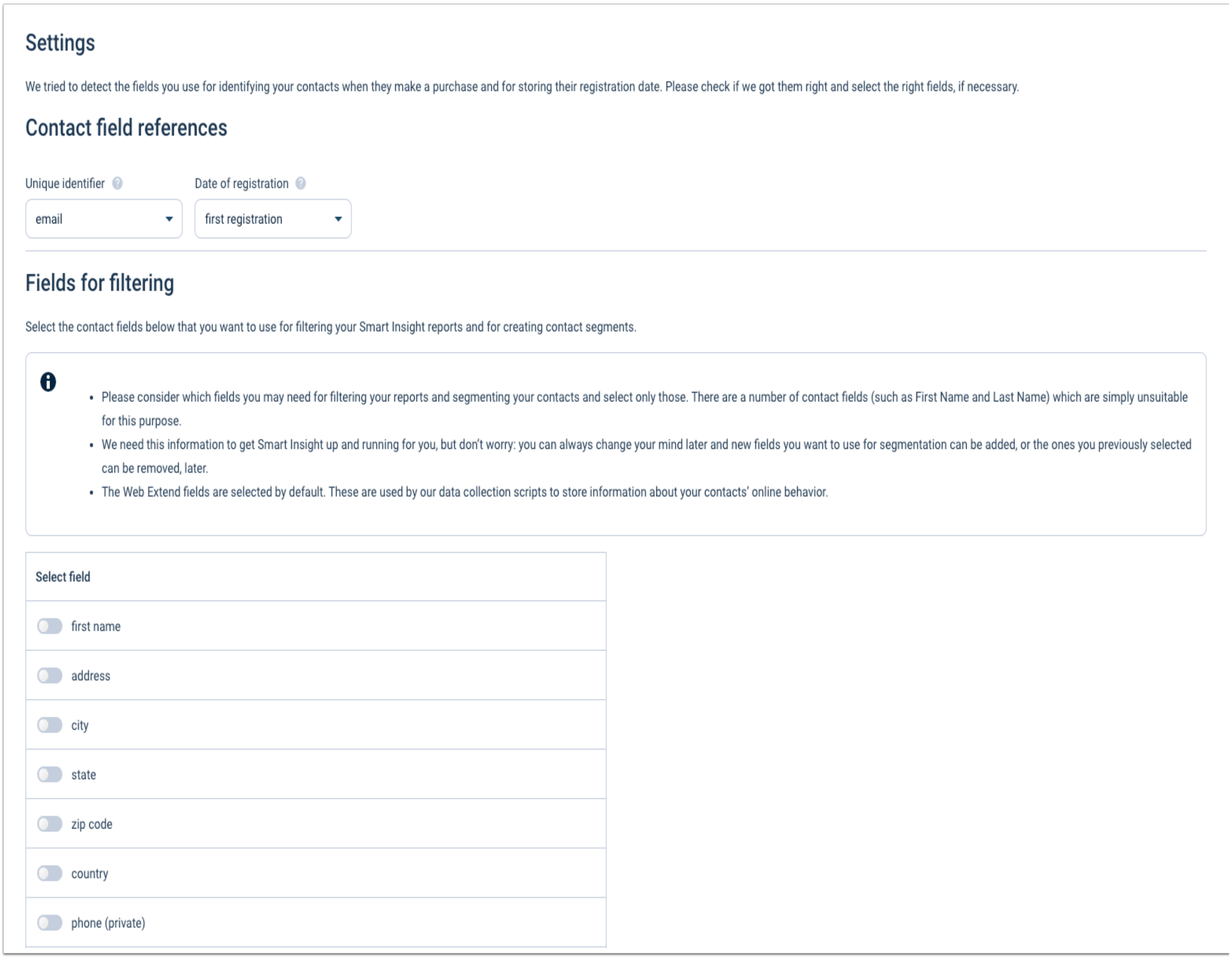
      If you change the **Unique identifier** in the contact fields and the **Contact identifier** in the sales data file, then it will not create duplicate contacts in the Smart Insight database. In this case, you don't need to reload your data because the contacts will be identified retrospectively during the next data load.

    - **Date of registration**
    - **Fields for filtering**

   To select or remove **Fields for filtering**, switch the toggle.

   ### i Note

    - The changes will only take effect after you have confirmed and saved them.
    - You need to consider which fields you want to appear as attributes for creating segments from your Smart Insight reports, and select only those. You cannot select multiple choice fields for filtering. Some contact fields are unsuitable for filtering, for example `First Name` and `Last Name`. We do not recommend choosing, for instance, the `Last Name` field for such purposes because filtering your reports by the contacts' last names (e.g. Smith) would not help you customize the Smart Insight charts effectively.
    - You can change these settings later. You will still be able to add new fields as attributes for segmentation, or remove the ones you previously selected.
    - The Web Extend fields `Predict top categories` and `Predict last session date` are selected by default. These are used by our data collection scripts to store information about the online behavior of your contacts.



3. To finalize your changes, click **Save**.

Resetting the Product Data File

Prerequisites

Before resetting your product data file, make sure that:

- You read and understand the process and its impact as described below,
- You are prepared to make the necessary changes,
- A full product data file (using the new format) is available for upload and
- You are ready to adjust all of your segments using product data fields.

⚠ Caution

Resetting your product data file structure is an invasive operation that can severely impact your scheduled campaigns and automated programs.

Setting up the new product data file is followed by an automatic process that involves the following:

1. Recreating your product table in the database. Data from fields that did not change (i.e. that were in the original configuration with the same name and data type) will be copied over. There are two possible scenarios:

- If you want to delete some fields from the product data file, then you do not have to upload your full product data file.
- If new fields are added, then those are created in the database with empty values by default. To make your product data complete and available for segmentation again, a full product data file upload is necessary.

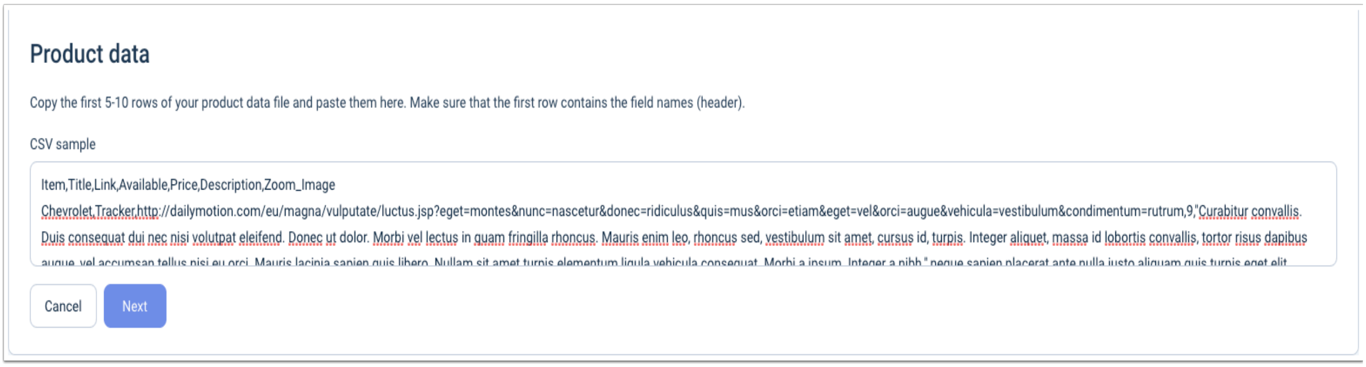
2. Updating the product attributes available for creating Smart Insight segments to reflect the changes. If a Smart Insight segment references a product attribute which has been deleted, the segment will fail. Please check all such segments and update them accordingly.

Procedure

1. To reset your product data file, click **Reset**.
2. Copy the first 5-10 rows of your product data file and paste them here, then click **Next.**

   i Note

   Make sure that the first row contains the field names (header).



3. Smart Insight automatically detects the following values:
   a. **Delimiter**
   b. **Quote**
   c. **File name** - Enter a pattern that contains wildcard characters (e.g. `product*.csv` or `sales_data*.csv`) because you will have to give a unique name to each file that you will upload later.

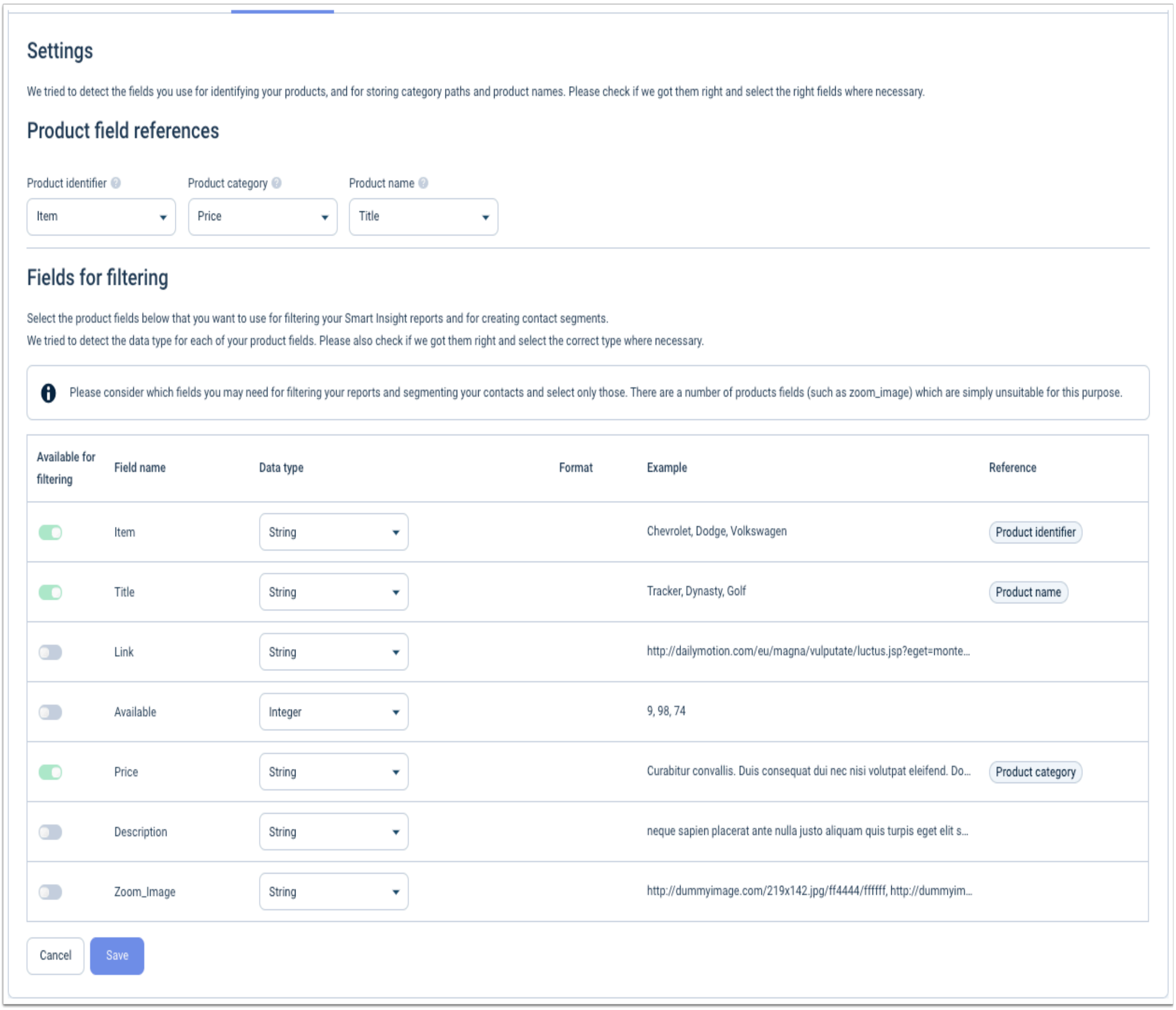
   If the values were not correctly detected, you can specify them manually.

   When you are ready, click **Next**.
4. Smart Insight automatically detects the fields below:
   - **Product identifier**
   - **Product category**
   - **Product name**
   - **Fields for filtering**

   If the fields were not correctly detected, you can select the fields and their data type manually.

   i Note

   - You need to consider which fields you want to appear as attributes for creating segments from your Smart Insight reports, and select only those. Some product fields are unsuitable for these purposes, for example `zoom_image`. We do not recommend choosing, for instance, the `zoom_image` field for filtering because it contains long URLs and filtering your reports by this field would not help you customize the Smart Insight charts effectively.
   - The changes will only take effect after you have confirmed and saved them.



5. To finalize your changes, click **Save**.

Resetting the Purchase Fields

Prerequisites

Before resetting your purchase fields, make sure that:

- You read and understand the process and its impact as described below,
- You are prepared to make the necessary changes,
- A full historical sales data file (using the new format) and the product data file are available for upload and
- You are ready to adjust all of your segments using purchase fields.

⚠ **Caution**

Resetting your purchase fields is an invasive operation that can severely impact your scheduled campaigns and automated programs.

Setting up the new purchase fields is followed by an automatic process that involves the following:

1. Recreating your purchase table in the database. Data from fields that did not change (i.e. that were present in the original configuration with the same name and data type) will be copied over. There are two possible scenarios:

    a. If you only want to delete some fields from the purchase file configuration, then you do not have to empty your database and upload your full historical sales data file and your complete product data file.

    b. If new fields are also added, then the solution is a bit more complicated. New fields are created in the database filled with an empty value by default. You only need to reload your data into Smart Insight if you would like to populate the new field for historical purchases (otherwise, it will be empty). In this case, you have to empty the entire database and upload your full historical sales data file and your complete product data file.

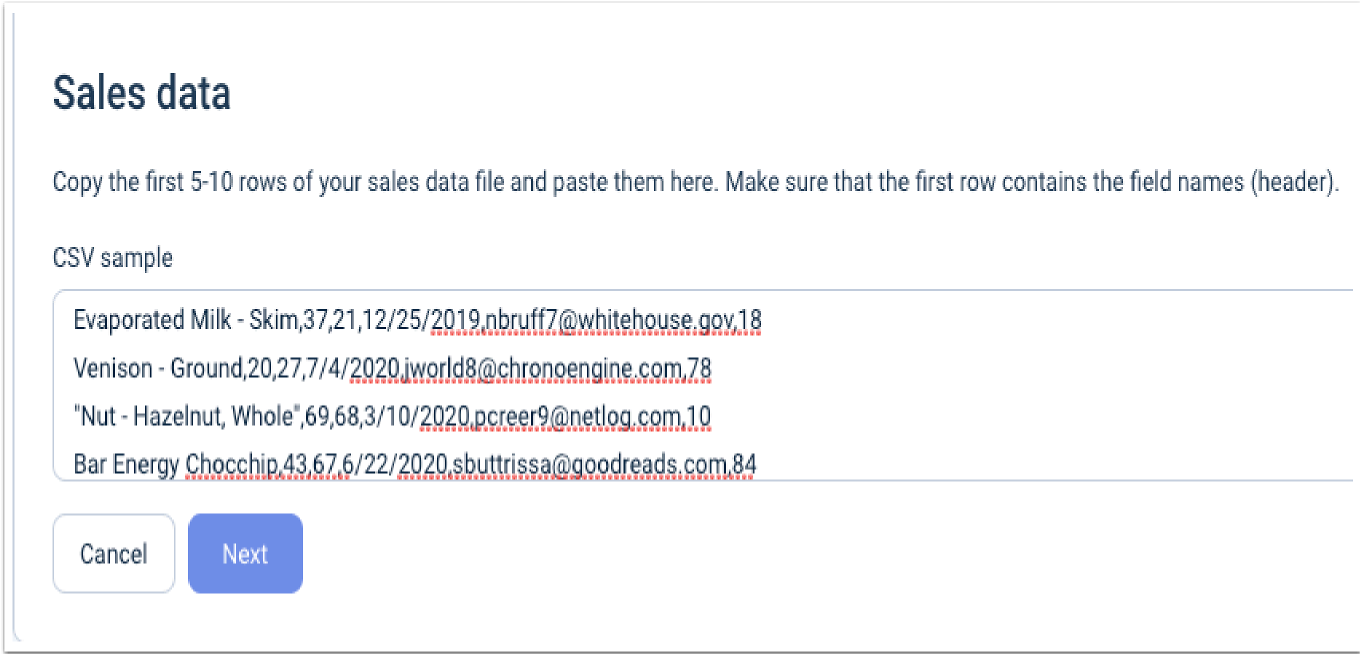
2. Updating the purchase attributes available for creating Smart Insight segments to reflect the changes. If a Smart Insight segment references a purchase attribute which has been deleted, the segment will fail. Please check all such segments and update them accordingly.

Procedure

1. To reset your purchase fields, click **Reset**.
2. Copy the first 5-10 rows of your sales data file and paste them here, then click **Next**.

    i Note

    Make sure that the first row contains the field names (header).

3. Smart Insight automatically detects the following values:

    - **Delimiter**
    - **Quote**
    - **File name** - Enter a pattern that contains wildcard characters (e.g. `product*.csv` or `sales_data*.csv`) because you will have to give a unique name to each file that you will upload later.

    If these values were not correctly detected, you can specify them manually.

    When you are ready, click **Next**.

4. Smart Insight automatically detects the fields below:

    - **Contact identifier**

        ⚠ Caution

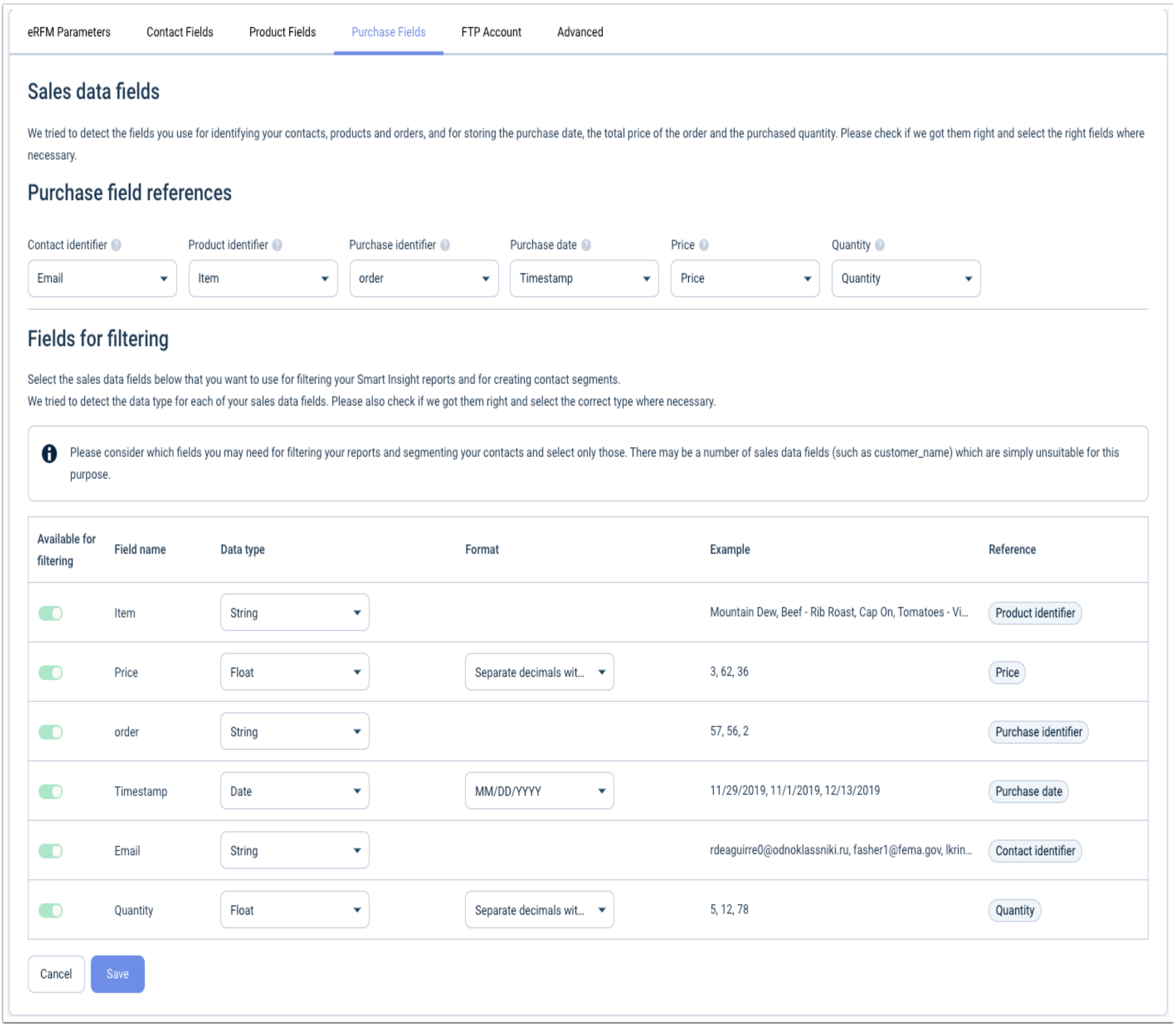
If you change the **Unique identifier** in the contact fields and the **Contact identifier** in the sales data file, then it will not create duplicate contacts in the Smart Insight database. In this case, you don't need to reload your data because the contacts will be identified retrospectively during the next data load.

- **Product identifier**
- **Purchase identifier**
- **Purchase date**
- **Price**
- **Quantity**
- **Fields for filtering**

If the fields were not correctly detected, you can select the fields and their data type manually.

Note

- You need to consider which fields you want to appear as attributes for creating segments from your Smart Insight reports, and select only those. Some sales data fields are unsuitable for these purposes, for example `customer_name`. We do not recommend choosing, for instance, the `customer_name` field for such purposes because filtering your reports by this field would return results related to a single customer that would not help you customize the Smart Insight charts effectively.
- The changes will only take effect after you have confirmed and saved them.



5. To finalize your changes, click **Save**.

Resetting the Store Fields

Prerequisites

Before resetting your store fields make sure that:

- You read and understand the process and its impact as described below,
- You are prepared to make the necessary changes,
- A full historical store data file (with the new format) and product catalog are available for upload and
- You are ready to adjust all your segments that use store fields.

Caution

Resetting your store fields is an invasive operation that can severely impact your scheduled campaigns and automated programs.

If you need to change the structure of your store data files (e.g. you would like to add or delete fields or use a different field as a reference), then you can repeat the initial setup process to configure the store file by clicking the **Reset** button. This process allows you to change the format and structure of your store data file without any restrictions.

Setting up the new store fields is followed by an automatic process that involves the following:

1. Recreating your store data in the database. During this process only the data in the fields that did not change will be preserved (i.e. the fields that were present in the original configuration with the same name and data type). There are two possible scenarios:

a. If you would like to delete some fields from the store file configuration, then you do not have to empty the entire database and upload your full historical store data file and your complete product catalog.

b. If new fields are also added, then the solution is a bit more complicated. New fields are created in the database filled with an empty value by default. It is not possible to upload missing (empty) custom field data for already existing stores, so a full reload is necessary. In this case, you have to empty the entire database and upload your full historical store data file and your complete product catalog.

2. Recreating all filters that reference store fields. This can potentially break existing segments; therefore, to ensure flawless operation, all segments using store filters should be recreated after the change is completed.

Procedure

1. To reset your store data, click **Reset**.
2. Copy the first 5-10 rows of your store data file and paste them here, then click **Next**.

   Note

   Make sure that the first row contains the field names (header).

3. Smart Insight automatically detects the following values:
   - Delimiter
   - Quote
   - File name - Enter a pattern that contains wildcard characters (e.g. `store*.csv`) because you will have to give a unique name to each file that you will upload later.

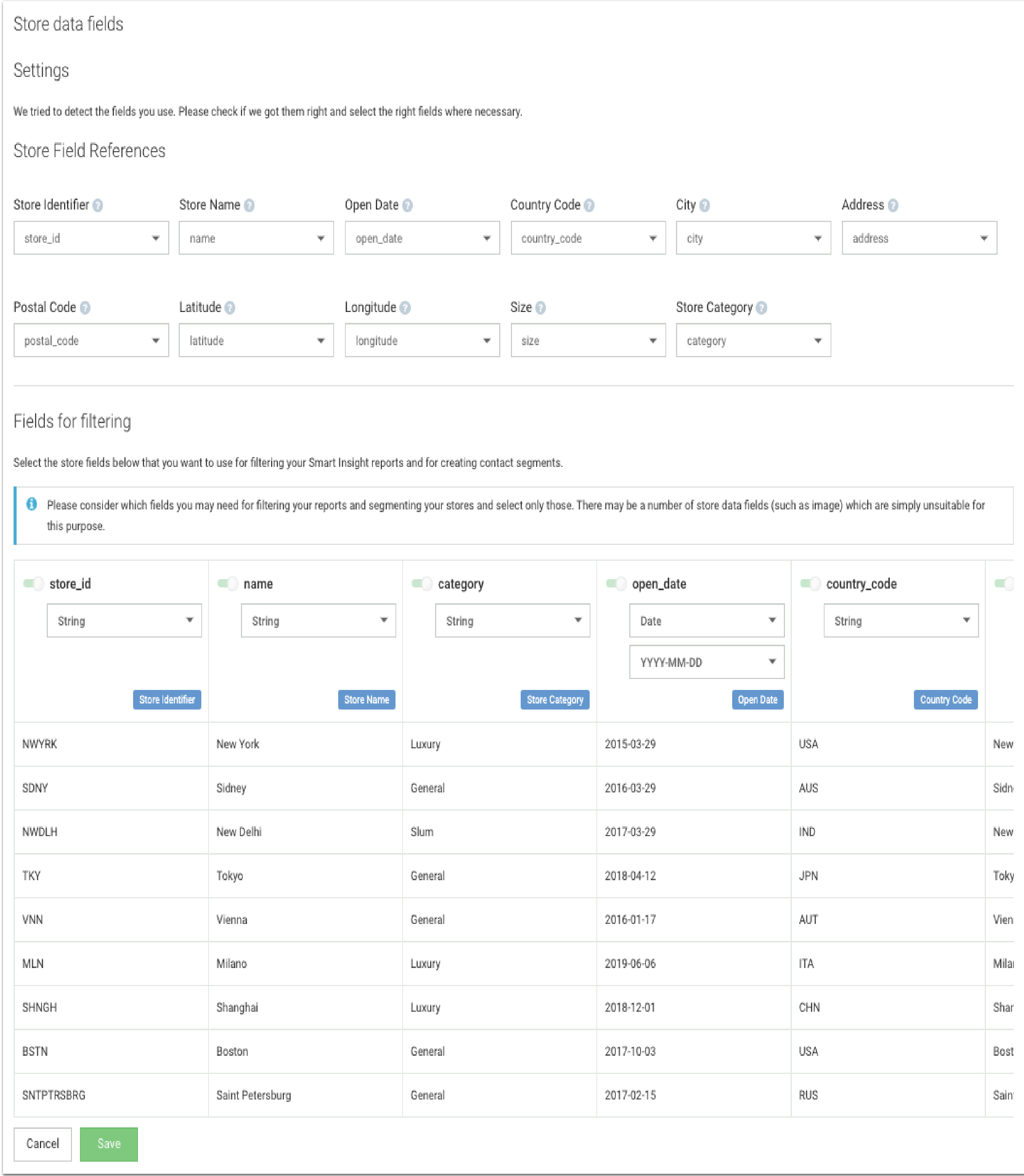
   If the values were not correctly detected, you can specify them manually.

   When you are ready, click Next.

4. Smart Insight automatically detects the fields below:
   - Store Identifier
   - Store Name
   - Open Date
   - Country Code
   - City
   - Address
   - Postal Code
   - Latitude
   - Longitude
   - Size
   - Store Category
   - Fields for filtering

   If the fields were not correctly detected, you can select the fields and their data type manually.

   #### i Note
   - You need to consider which fields you would like to use for filtering your reports and segmenting your stores, and select only those. Some store data fields are unsuitable for this purpose, for example, images. We do not recommend choosing, for instance, the `image` field for such purposes because filtering your reports by this field would not help you customize the Smart Insight charts effectively.
   - The changes will only take effect after you have confirmed and saved them.



5. To finalize your changes, click **Save**.

Regenerating Your FTP Account password

Here you can:

- Copy the **Server address** and **Username** that are used to log into our secure FTP server and upload your data files by clicking the *e-clipboard* icon.
- Regenerate your account password if you forgot it by clicking the **Regenerate Password** button.

⚠ Caution

Due to a change in our back-end, after regenerating your password, you no longer need to send your new password to SAP Emarsys Support in order to update it manually.

Modifying the Advanced Settings

Procedure

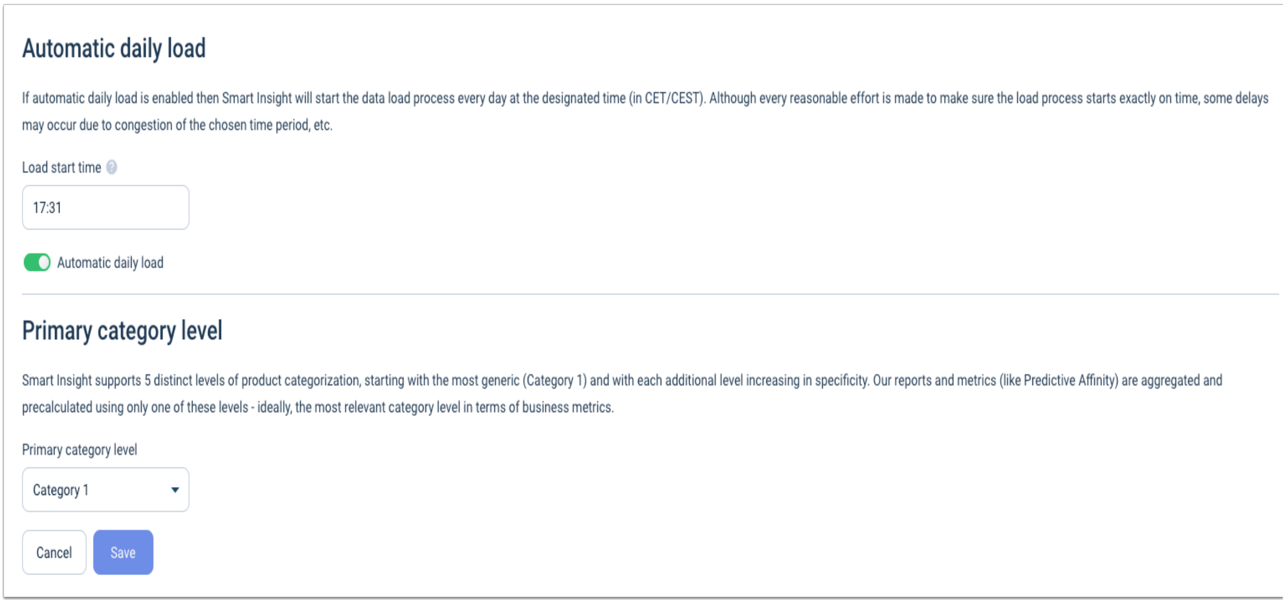
1. You can modify the following values by clicking **Edit**:
    - **Load Start Time**

      You can turn off **Automatic Daily Load** by switching the toggle.
    - **Primary Category Level**

      Note

      We recommend selecting the second product category level as the default **Primary Category Level**, except in the following cases:

        - If you have only one product category level, then select that one.
        - If another product category level meets your requirements better than the second level, then select that one.



2. To save your changes, click **Save**.

Reloading Data into Smart Insight

In some cases (e.g. after adding a new field to your sales data file), the data in Smart Insight cannot be automatically amended, and a full historical reload of customer data is necessary. Although it might be inconvenient, it is also beneficial to data quality because reloading your full historical customer data removes all accidental duplicates from your database that might have accumulated over the years.

When do I need to reload my Smart Insight data?

You need to reload your data into Smart Insight when:

- You add a new field to your sales data file and you would like to use that retrospectively.

- You change your Unique identifier (i.e. the contact identifier).
- Your results or Smart Insight screens are distorted due to incorrect sales data (i.e. duplicate orders).
- Your account is switched to SAP Emarsys Retail and you would like to turn on Store Reporting. In this case, data reload is required to establish connection between old purchases, their store IDs and the stores in the store data. Please note that Smart Insight cannot establish the connection retroactively for already imported purchases.
- You change your Revenue Attribution settings (i.e. the attribution method or window) and you would like your data to reflect the changes retrospectively.
- You change the structure of your product categories.

Note

After reloading the data into Smart Insight, SAP Emarsys recalculates the Revenue Attribution Service data automatically. The Revenue Analytics, Strategic Dashboard and Smart Insight reports will reflect the data from the Revenue Attribution Service.

Reloading your Smart Insight data

To reload your Smart Insight data, proceed as follows:

Caution

While your Smart Insight data is being reloaded, make sure that you:

- Are not uploading data into Smart Insight, including automatic Predict or Plug-in data loads,

- Pause any Smart Insight-based programs,

- Are not using Smart Insight segments and campaigns.

1. To empty your database, navigate to the **Management** > **Smart Insight Settings** > **Advanced** tab and click the **Empty Database** button.

Caution

Before emptying your database, consider the following:

- This process deletes all your data stored in Smart Insight and usually takes 2-10 minutes. All your other data (contacts, etc.) in SAP Emarsys will remain untouched.

- This is an irreversible operation that can severely impact your scheduled campaigns and automated communication. Please consider the possible consequences of this procedure before performing it.

2. Change your contact identifier if required.

Note

The selected unique identifier has to be identical in your sales data file and in the SAP Emarsys database. This identifier is used to:

- identify your contacts when they make a purchase and

- store their registration date.

For more information, see Selecting contact fields for filtering.

3. When your database is empty, reload your full historical sales data file and a complete product data file in the usual way.

Note

Take the following into consideration:

- Your next scheduled data load will fetch the files and load all data to Smart Insight. If you do not want to wait for the next scheduled load, you can initiate a load manually from the **Data Loads** page by clicking **Load Now**.
- Until your data is fully loaded, your account will contain only partial, or no data at all. Therefore, during this period all segmentation requests will return empty, partial or false data and this will be reflected in your reports. To avoid such errors, we recommend suspending all Smart Insight-based programs and campaigns until your account is fully operational.
- When reloading your Smart Insight data, please also pay attention to the dependencies, including the timing of the submitted orders and the details included within the timestamps etc., that might affect the Revenue Attribution Service.
- If your product data comes from Predict, then it will be synced nightly, so it might happen that some of your segments will be unavailable for a day until synchronization is completed.
- Smart Insight data reload does not affect Loyalty, only pending points may be recalculated based on new purchase data.

4. If you need to reload missing products after the initial product data synchronization, then proceed as follows:

a. Navigate to the **Management** > **Smart Insight Data Quality** page, select **Unknown products**, then click **Export**.

b. Upload the missing products in a single product CSV file (you need to upload this file only once).

5. To verify the delta files containing the changes, choose from the following options:

- If you upload your data through the API, then check the entries in your API log and on the Data Loads page. To confirm that your sales data is accurate, you need to compare the results to your total sales amount.
- If you upload your data by using the FTP, then go to the **Analytics** > **Impact** page and check the reports to confirm that your total sales amount is accurate.

FAQ

How can I upload the same sales data files via the Sales data API again?

If you wanted to upload exactly the same sales data files via the Sales data API, please contact the Predict Team with the help of SAP Emarsys Support to complete this step, to overcome a preventative mechanism of the Sales Data API.

Alternatively, you can upload your Sales Data manually.

When you are ready, please also contact your Client Success Manager who will help you reload the sales data files into Smart Insight.

Can I empty the Smart Insight database if Batch Sales Data Load is enabled in my account?

If you are using our Batch Sales Data Load solution, then your sales data will not be deleted when you empty your Smart Insight database. For more information, see Emptying your Smart Insight database when using Batch Sales Data Load.

Error Message - Duplicate key violates unique constraint "con_product_affinity_pkey"

Note

This is a Smart Insight error message.

This message can appear on the **Settings** > **Data Load History** page.

It means that the **predict top categories** and the **unique identifier** (which identifies the purchase) fields has the same value for 2 contacts. You must amend the unique identifier for one of the contacts under the **Other** tab in their contact profile page, or delete the unnecessary contact in order to make contact load possible.