CXINTEL – CUSTOMER EXPERIENCE INTELLIGENCE PLATFORM
Phase 9: Reporting & Dashboards

REPORTS

I. **REPORT 1: Sentiment Distribution Report**

Goal: View how many feedbacks are Positive, Neutral, or Negative

1. Group Rows by: Sentiment__c
2. Add Columns: Customer_Email__c, CreatedDate
3. Add Chart:
   - Type: Pie Chart
   - Show Values: Count

II. **REPORT 2: Sentiment Trend Over Time**

Goal: See how sentiment changes over time (weekly/monthly)

1. Group Rows by: CreatedDate → Set Group Date by Week or Month
2. Add Sentiment__c as second grouping
3. Add Chart:
   - Type: Stacked Bar Chart (or Line Chart)
   - X-Axis: Date
   - Legend: Sentiment

III. **REPORT 3: Average Sentiment Score by Week**

Goal: See if the average mood is improving

1. Group Rows by: CreatedDate (Group by Week)
2. Add Column: Sentiment_Score__c
3. Summarize: Average of Sentiment_Score__c
4. Add Chart: Line Chart showing average score over weeks

IV.   **REPORT 4: Feedback Volume Over Time**

Goal: Monitor how many users submitted feedback each day/week

1. Group by: CreatedDate (Daily or Weekly)

2. Show: Record Count

3. Add Chart: Bar chart showing volume trend

V.   **REPORT 5: Top 10 Most Negative Feedbacks**

Goal: Surface the most critical feedback

1. Filter: Sentiment__c = Negative

2. Sort by: Sentiment_Score__c ascending (lowest first)

3. Add Columns: Customer_Email__c, Feedback_Text__c, Sentiment_Score__c

VI.   **REPORT 6: Feedback Without Sentiment**

Goal: Identify records missed by sentiment analysis

1. Filter: Sentiment__c = Blank

2. Add: Feedback_Text__c, Customer_Email__c, CreatedDate

VII.   **REPORT 7: Recent Feedback (Last 7 Days)**

Goal: Daily/weekly team monitoring of recent responses

1. Filter: CreatedDate = LAST 7 DAYS

2. Sort by: CreatedDate DESC

3. Add Columns: Sentiment__c, Feedback_Text__c, Sentiment_Score__c

VIII.   **REPORT 8: Sentiment Score Distribution**

Goal: View distribution by score range (e.g., highly negative to highly positive)

1. Create a Bucket Field for Sentiment_Score__c:

Ranges:

Step	Bucket Name	Condition (Use <=)	Range It Covers
1	Highly Negative	<= -0.5	Score $\leq$ -0.5
2	Mildly Negative	<= 0	-0.5 < Score $\leq$ 0

3	Neutral	<= 0.2	0 < Score ≤ 0.2
4	Mildly Positive	<= 0.5	0.2 < Score ≤ 0.5
5	Highly Positive	> 0.5	Score > 0.5

2. Group by: Your new bucket field
3. Add Chart: Horizontal Bar

IX. REPORT 9: Feedback by Customer

Goal: View all feedbacks grouped by individual users

1. Group Rows by: Customer_Email__c

2. Add Columns: Sentiment__c, Sentiment_Score__c, CreatedDate

X. REPORT 10: Positive Feedbacks for Marketing

Goal: Identify customers with strong positive feedback

1. Filter:

   o Sentiment__c = Positive

   o Sentiment_Score__c > 0.7

2. Add Columns: Customer_Email__c, Feedback_Text__c, Sentiment_Score__c

- **Main Folder for Reports : CXIntel**
- **Sub Folders : Feedback Analytics , Data Quality, Customer Monitoring**

Folder Name	Reports
Feedback Analytics	1, 2, 3, 4, 8, 10
Data Quality	5, 6
Customer Monitoring	7, 9

DASHBOARDS

1. Sentiment Overview

Report Used	Purpose
Report 3: Average Sentiment Score	Quick KPI to see how customers feel overall
Report 1: Sentiment Distribution	Breakdown of positive, neutral, negative
Report 2: Sentiment Trend Over Time	How sentiment has changed over time

2. Feedback Activity

Report Used	Purpose
Report 4: Feedback Volume Over Time	Shows daily/weekly user feedback submission rates
Report 5: Top 10 Negative Feedbacks	Highlight critical responses for quick action
Report 7: Recent Feedback (7 Days)	Shows what users are saying lately

3. Customer Insights

Report Used	Purpose
Report 8: Sentiment Score Distribution	Bucketed insights (e.g., highly negative to positive)
Report 6: Feedback Without Sentiment	Identify records missed by Python sentiment engine
Report 10: High Praise Feedback	Pull strongest positive responses for testimonials

Sentiment Overview

Average Sentiment Score by Week

CustomerFeedback: Created Date

View Report (Average Sentiment Score by V   As of Jun 18, 2025, 3:40 AM

Sentiment Distribution

Record Count

22

Sentiment
- ●
Positive ●
Neutral ●
Negative ●

View Report (Sentiment Distribution)   As of Jun 18, 2025, 3:40 AM

Sentiment Trend Over Time

CustomerFeedback: Created Date

Sentiment
- ■
Positive ■
Neutral ■
Negative ■

View Report (Sentiment Trend Over Time)   As of Jun 18, 2025, 3:40 AM

Feedback Activity

Feedback Volume Over Time

CustomerFeedback: Created Date

View Report (Feedback Volume Over Time)   As of Jun 18, 2025, 3:40 AM

Top 10 Negative Feedbacks

Customer Email	Feedback Text	Sentiment S-
shariefparvez95@gm	bad experience not happy with my experience	-0.55
shariefparvez95@gm	Worst unbelievable naive experience too bad not happy	-0.53
22a91a05b8@aec.ec	Terrible customer service. I had to wait 3 days for a simple answer.	-0.50
22a91a05b8@aec.ec	Completely frustrated. My issue is still unresolved after multiple follow-ups.	-0.35
22a91a05b8@aec.ec	The product quality was poor, and no one responded to my complaint.	-0.35

View Report (Top 10 Negative Feedbacks)   As of Jun 18, 2025, 3:40 AM

Recent Feedback (Last 7 Days)

Sentiment ^	Feedback Text	Sentiment Score
Positive	good	0.40
Neutral	better	0.10
Negative	bad	-0.50

View Report (Recent Feedback (Last 7 Days   As of Jun 18, 2025, 3:50 AM

Customer Insights

Sentiment Score Distribution

Sentiment Score Classification

View Report (Sentiment Score Distribution)   As of Jun 18, 2025, 3:40 AM

Feedback Without Sentiment

Customer Email ^	Feedback Text	CustomerFeedback: Created Da
22a91a05b8@aec.edu.in	Good Customer Service	6/5/2025
shariefparvez95@gmail.cc	Good Service	6/5/2025

View Report (Feedback Without Sentiment)   As of Jun 18, 2025, 3:40 AM

High Praise Feedback

Customer Email	Feedback Text	Sentiment ≀
dandetejaswini2908@gi	very happy excellent best	1.00
shariefparvez95@gmail	very good happy	0.85
shariefparvez95@gmail	i have the the most best experience in my life it was the best experience of my life.	0.83
shariefparvez95@gmail	best experience very happy and satisfied	0.83
shariefparvez95@gmail	wonder experience excellent insights extremely satisfied	0.75

View Report (Positive Feedbacks for Market   As of Jun 18, 2025, 3:40 AM