# **CustomerMind IQ**

## **Complete Training Manual**

Universal Customer Intelligence SaaS Platform

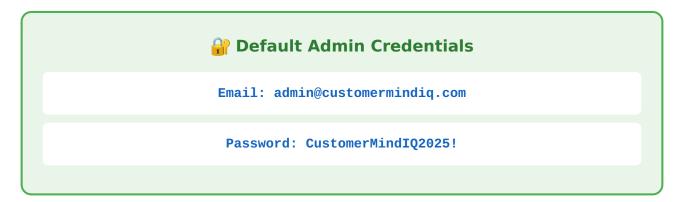
**Professional Edition v2.0** 

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## 1. Authentication & Security

#### **Enterprise Authentication System**

CustomerMind IQ features enterprise-grade JWT token-based authentication with role-based access control, automatic session management, and multi-factor security options.



#### **Authentication Features**

#### 🔒 Security Features

- ✓ JWT token-based authentication
- Automatic token refresh
- ✓ Session timeout management
- ✓ Account lockout protection
- Password complexity requirements
- Role-based access control (RBAC)

#### **User Roles**

- User: Standard dashboard access
- ✓ Admin: User management capabilities
- ✓ Super Admin: Full platform control
- ✓ Trial users get Starter tier access
- ✓ Role-based feature visibility
- ✓ Subscription tier permissions

#### **§** Security Best Practices:

- ✓ Change default admin password immediately after first login
- ✓ Enable two-factor authentication for admin accounts
- ✓ Regularly review user access and permissions
- ✓ Monitor login activities and failed attempts
- ✓ Use strong, unique passwords for all accounts

## 2. 7-Day Free Trial System

#### **Trial Registration Process**

The 7-day free trial provides complete access to Starter tier features without requiring credit card information. This allows users to fully evaluate the platform before committing to a subscription.

## Access Trial Registration

Click "Start 7-Day Free Trial - No Credit Card Required" button on the login page to begin the registration process.

## 2 Complete Registration Form

- √ First Name and Last Name (required)
- ✓ Company Name (optional but recommended)
- ✓ Email Address (required becomes login ID)
- Secure Password (must meet complexity requirements)

## 3 Automatic Account Creation

Upon registration, the system automatically creates a trial account with Starter tier permissions and sets a 7-day expiration date.

## Instant Access

Users are immediately logged in and can access all Starter tier features including basic analytics, customer intelligence, and platform navigation.

#### **Trial Features & Limitations**

#### **Trial Includes**

- ✓ Full Starter tier feature access
- 3 websites monitoring capability
- √ 50 keywords tracking
- ✓ Basic analytics and reporting
- ✓ Customer intelligence insights
- ✓ Email support access
- Training materials and documentation

## **Trial Management**

- 7-day duration from registration
- No automatic billing or charges
- ✓ Account hold after expiration
- Upgrade available anytime during trial
- Data retention during hold period
- ✓ Admin extension capabilities

#### **⚠** Trial Expiration Process:

- Account is automatically placed on hold after 7 days
- ✓ Users receive email notifications before expiration
- ✓ Data is preserved for 30 days during hold period
- ✓ Users can upgrade to paid plan to reactivate access
- No automatic billing explicit subscription required

## 3. Subscription Tiers & Pricing

## **Current Pricing Structure (Limited-Time Sale)**

CustomerMind IQ offers four subscription tiers designed to scale with business needs. Currently featuring 50% off promotional pricing.

#### Starter

\$99/month

#### \$49/month

#### 50% OFF

- 3 websites monitored
- ✓ 50 keywords tracked
- ✓ Basic analytics dashboard
- 2 team members
- ✓ Email support
- ✓ Core Al insights

#### **Professional**

\$299/month

**\$149/month** 

50% OFF

- 10 websites monitored
  - 200 keywords tracked
- Full analytics suite
  - 10 team members
    - Product intelligence
      - Priority chat support

#### **Enterprise**

\$799/month

#### **\$399/month**

#### 50% OFF

- Unlimited websites
- ✓ 500+ keywords
- Advanced compliance tools
- Unlimited team members
- Al Command Center
- ✓ Phone support + SLA

#### **Custom Enterprise**

#### **Contact Sales**

#### CUSTOM

- Everything in Enterprise
- On-premise deployment
- ✓ Custom integrations
- Dedicated support team
- Custom ML models
- ✓ 24/7 priority support

## **Feature Comparison**

#### Al & Analytics

- Starter: Basic customer insights
- Professional: Advanced behavioral analysis
- Enterprise: Predictive modeling
- Custom: Proprietary Al models

# Reporting & Dashboards

✓ Starter: Standard reports

Professional: Custom dashboards

 Enterprise: Executive reporting

✓ Custom: White-label options

## 4. Dashboard Navigation

## **Main Navigation Structure**

The CustomerMind IQ platform is organized into two primary dashboard views, each focusing on different aspects of customer intelligence and business analytics.

## Customer Analytics Dashboard

Comprehensive customer intelligence and business analytics tools:

#### **Core Analytics**

- Customer Intelligence: Alpowered customer insights and segmentation
- Real-Time Health: Live platform monitoring and system status
- Marketing Automation:
   Multi-channel campaign
   management
- Revenue Analytics:
  Financial forecasting and revenue optimization

#### **Advanced Features**

- Advanced Features: Behavioral clustering & churn prevention
- Customer Success:
  Retention optimization and lifecycle management
- Executive Dashboard: C-level insights and strategic metrics
- Growth Intelligence:
   Expansion opportunities and
   scaling insights

## Website Analytics Dashboard

Website performance and technical intelligence modules:

#### **Website Intelligence**

- Website Intelligence:
   Performance monitoring and optimization
- Analytics & Insights: Traffic analysis and user behavior
- Product Intelligence:
   Feature usage analytics and adoption

#### **Technical Management**

- Integration & Data Hub:
  API management and data connectors
- Compliance & Governance:
   Regulatory monitoring and compliance
- Al Command Center: Model management and Al operations

#### **Navigation Tips:**

- ✓ Use the toggle buttons to switch between Customer and Website analytics
- ✓ Bookmark frequently used modules for quick access
- ✓ Check notification badges for important updates
- ✓ Use search functionality to quickly find specific features

## 5. Customer Analytics Modules

#### **Customer Intelligence Al**

Al-powered customer analysis providing deep insights into customer behavior, preferences, and lifecycle management.

## Behavioral Analysis

- Customer segmentation and clustering
- ✓ Behavioral pattern recognition
- Journey mapping and touchpoint analysis
- Engagement scoring and metrics
- ✓ Lifecycle stage identification

## Predictive Analytics

- Churn prediction and prevention
- ✓ Lifetime value calculations
- ✓ Upsell/cross-sell opportunities
- ✓ Purchase propensity modeling
- ✓ Risk assessment and scoring

## **Marketing Automation Pro**

Comprehensive marketing automation with Al-powered campaign optimization and multichannel orchestration.

## Campaign Creation

Design and launch marketing campaigns using Al-assisted content creation, audience targeting, and channel optimization.

## 2 Multi-Channel Orchestration

Coordinate campaigns across email, social media, web, and mobile channels with unified messaging and timing.



#### 3 A/B Testing & Optimization

Automatically test campaign variations and optimize performance based on realtime engagement data.



#### **Performance Analytics**

Track campaign effectiveness with detailed metrics, conversion tracking, and ROI analysis.

## **Revenue Analytics Suite**

Financial intelligence and revenue optimization tools for strategic business planning.

#### **K** Financial Forecasting

- Revenue prediction and modeling
- ✓ Seasonal trend analysis
- ✓ Budget planning and variance tracking
- Cash flow forecasting
- ✓ Scenario planning tools

#### **Performance Metrics**

- ✓ Monthly/Annual Recurring Revenue (MRR/ARR)
- ✓ Customer Acquisition Cost (CAC)
- ✓ Customer Lifetime Value (CLV)
- ✓ Churn rate and retention metrics
- Unit economics and profitability

## 6. Website Analytics Modules

#### **Website Intelligence Hub**

Comprehensive website performance monitoring, user experience optimization, and technical health analysis.

# PerformanceMonitoring

- ✓ Page load speed analysis
- ✓ Core Web Vitals tracking
- ✓ Mobile responsiveness testing
- Uptime and availability monitoring
- ✓ Error tracking and debugging

#### **User Experience**

- ✓ User journey and flow analysis
- Conversion funnel optimization
- ✓ Heatmap and click tracking
- ✓ A/B testing capabilities
- Accessibility compliance monitoring

## **Product Intelligence**

Feature usage analytics, product-market fit analysis, and user adoption insights.

## Feature Usage Tracking

Monitor which features are used most frequently, identify adoption patterns, and track user engagement with different product capabilities.

## 2 Onboarding Optimization

Analyze user onboarding flows, identify drop-off points, and optimize the new user experience for better activation rates.

## Product-Market Fit Analysis

Measure product-market fit indicators, analyze user retention curves, and identify opportunities for product improvements.

## **Compliance & Governance**

Regulatory compliance monitoring, data governance, and security management tools.



#### Data Protection

- ✓ GDPR compliance monitoring
- ✓ CCPA data rights management
- ✓ Cookie consent tracking
- ✓ Data retention policies
- ✓ Privacy impact assessments

## Audit & Reporting

- ✓ Compliance audit trails
- ✓ Risk assessment reports
- ✓ Security incident tracking
- Regulatory reporting automation
- ✓ Policy violation alerts

#### 7. Admin Panel Features

#### **Admin Access & Overview**

Administrative features are available to users with Administrator or Super Administrator roles, providing comprehensive platform management capabilities.



#### Admin Requirements

Admin panel access requires Administrator or Super Administrator role. Use the provided admin credentials to access these features.

#### **Banner Management System**

Create and manage targeted announcements that appear to users based on their subscription tier, role, or specific targeting criteria.

#### **Create Announcements**

- Navigate to Admin Panel → Banner Management
- ✓ Click "New Banner" to create announcements
- Set title, message, and banner type (Info, Warning, Success, Training, Maintenance)
- ✓ Configure targeting options and display settings

#### **Targeting & Scheduling**

- ✓ Target specific user roles or subscription tiers
- Schedule banners with start and end dates
- ✓ Set priority levels for multiple active banners
- ✓ Enable/disable dismissible options



#### 3 Analytics & Performance

- Track banner view counts and engagement rates
- Monitor click-through rates for call-to-action banners
- ✓ Analyze dismissal rates and user interaction
- ✓ Generate banner performance reports

#### **Discount Management**

Flexible discount system supporting percentage, fixed amount, and tier-specific promotions with comprehensive tracking and analytics.



#### Discount Types

- ✓ **Percentage:** 25% off subscription fees
- ✓ Fixed Amount: \$50 off annual plans
- ✓ Free Months: 2 months free with upgrade
- ✓ Tier-Specific: Professional upgrade discounts

## **Targeting Options**

- ✓ Apply to specific users by email
- ✓ Target subscription tiers
- ✓ Set minimum purchase requirements
- ✓ Configure usage limits and expiration

## **User Management & Impersonation**

Comprehensive user account management with secure impersonation capabilities for customer support.

#### **?** Security Guidelines:

- ✓ All impersonation sessions are logged and audited
- ✓ Cannot impersonate other admin accounts
- ✓ Session time limits enforced (5 minutes to 8 hours)
- ✓ Must provide reason for each impersonation session
- ✓ Clear visual indicators during active impersonation

## 8. Data Integrations

#### **Integration Overview**

CustomerMind IQ supports multiple data integration methods to connect with existing business systems and external data sources.

#### Native Connectors

- CRM systems (Salesforce, HubSpot, Pipedrive)
- E-commerce platforms (Shopify, WooCommerce, Magento)
- Marketing tools (Mailchimp, Constant Contact)
- Analytics platforms (Google Analytics, Adobe Analytics)
- Payment processors (Stripe, PayPal, Square)

## Technical Options

- REST API endpoints for custom integrations
- Webhook support for real-time data sync
- CSV/Excel file upload capabilities
- Database direct connections (MySQL, PostgreSQL)
- Cloud storage integrations (AWS S3, Google Cloud)

## **Integration Setup Process**

## Access Integration Hub

Navigate to Website Analytics → Integration & Data Hub to view available connectors and integration options.

## Configure Data Sources

Select your integration type, provide necessary credentials or API keys, and configure data mapping and sync preferences.

## **3** Test & Validate

Run connection tests, validate data quality, and confirm that information is flowing correctly into your CustomerMind IQ dashboards.

## 4 Monitor & Maintain

Set up monitoring for integration health, configure alerts for sync failures, and regularly review data quality metrics.

## 9. Best Practices & Tips

#### **Platform Optimization**

Maximize the value of your CustomerMind IQ investment with these proven best practices and optimization strategies.

## **Getting Started Tips:**

- ✓ Complete your profile setup and company information thoroughly
- ✓ Connect at least 2-3 data sources for comprehensive insights
- ✓ Set up team members with appropriate role permissions
- Review training materials for your subscription tier
- Schedule regular check-ins with customer success team

## **Data Quality Management**

#### **Data Hygiene**

- Regular data cleaning and validation
- Consistent naming conventions
- ✓ Remove duplicate records
- Validate email addresses and contact info
- Monitor data completeness
   metrics

## 

- ✓ Monitor sync status regularly
- Set up alerts for integration failures
- Review API rate limits and usage
- Test integrations after system updates
- Maintain backup data export procedures

## **Performance Optimization**

## Dashboard Customization

Customize dashboards to focus on your most important KPIs and metrics. Remove unused widgets and organize information for quick decision-making.

## 2 Alert Configuration

Set up intelligent alerts for critical metrics like churn risk, revenue thresholds, and performance anomalies to enable proactive management.

## **3** Regular Review Cycles

Establish weekly, monthly, and quarterly review cycles to analyze trends, identify opportunities, and adjust strategies based on insights.

## 10. Troubleshooting Guide

#### **Common Issues & Solutions**

Quick resolution guide for frequently encountered issues and their solutions.

#### **Authentication & Access Issues**

## Login Problems

- ✓ Verify email address and password spelling
- ✓ Check for account lockout (5 failed attempts)
- ✓ Clear browser cache and cookies
- ✓ Try incognito/private browsing mode
- ✓ Contact support for password reset

## Permission Denied Errors

- ✓ Verify your subscription tier includes the feature
- ✓ Check user role permissions with admin
- ✓ Confirm trial period hasn't expired
- ✓ Log out and log back in to refresh permissions

## **Data & Integration Issues**

## Sync Problems

- Check integration status in Data Hub
- Verify API credentials are still valid
- Review rate limiting and quota usage
- ✓ Test connection manually
- Check source system for changes

#### Missing Data

- Confirm data source is properly connected
- ✓ Check date ranges and filters
- Verify permissions on source systems
- ✓ Review mapping configuration
- Allow 24-48 hours for initial sync

#### **Performance Issues**

#### When to Contact Support:

- ✓ Dashboard loading takes more than 30 seconds consistently
- ✓ Data discrepancies between source and CustomerMind IQ
- ✓ Integration failures persisting for more than 24 hours
- ✓ Billing or subscription issues
- ✓ Security concerns or suspected unauthorized access

## **Support Channels**

#### **E** Email Support

- ✓ support@customermindiq.com
- Include account email and issue description
- Attach screenshots if applicable
- Response within 24 hours (business days)

## Priority Support

- Professional tier: Live chat support
- ✓ Enterprise tier: Phone support+ SLA
- Custom tier: Dedicated support team
- 24/7 availability for critical issues