CustomerMind IQ

Quick Reference Guide

Essential Power User Reference & Daily Operations Guide

Professional v2.0

1. Navigation Reference & Platform Architecture

Platform Architecture Overview

CustomerMind IQ operates on a dual-dashboard architecture with 14 specialized intelligence modules:

- Customer Analytics Dashboard: 9 modules focused on customer behavior and business intelligence
- Website Analytics Dashboard: 6 modules for technical performance and optimization

Navigation Shortcuts

Action	Shortcut	Description
Switch to Customer Analytics	Click "CUSTOMER ANALYTICS"	Access 9 customer-focused modules
Switch to Website Analytics	Click "WEBSITE ANALYTICS"	Access 6 technical optimization modules
Access Training Materials	Header → "Training"	PDF guides and video tutorials
Access Knowledge Base	Header → "Knowledge Base"	Educational articles and FAQs
Admin Panel	Header → "Admin Panel"	Admin users only - platform management

Quick Module Access

Customer Analytics Modules

- **Customer Intelligence:** Al-powered insights and segmentation
- ▶ **Real-Time Health:** Live monitoring and alerts
- ► Marketing Automation: Campaign orchestration
- Revenue Analytics: Financial forecasting
- ► Advanced Features: ML-powered analytics
- ► **Customer Success:** Retention optimization
- **Executive Dashboard:** C-level insights
- ► **Growth Intelligence:** Expansion opportunities
- ► Create Campaign: Marketing workflow builder

Website Analytics Modules

- ▶ **Website Intelligence:** Performance monitoring
- ► Analytics & Insights: Traffic and behavior analysis
- Product Intelligence: Feature usage analytics
- ▶ Integration & Data Hub: API and data management
- ► Compliance & Governance: Regulatory monitoring
- ▶ **Al Command Center:** Model operations and automation

2. Performance Metrics Glossary & Scoring Framework

Key Performance Indicators (KPIs)

Metric	Good Range	Excellent Range	Notes
Customer Acquisition Cost (CAC)	< \$100	< \$50	Lower is better, industry- dependent
Customer Lifetime Value (CLV)	3x CAC	5x+ CAC	CLV:CAC ratio is critical
Monthly Churn Rate	< 5%	< 2%	Industry benchmark: 3-5%
Net Promoter Score (NPS)	30-50	70+	Scale: -100 to +100
Email Open Rate	20-25%	30%+	Varies by industry
Conversion Rate	2-5%	10%+	Highly context-dependent

Scoring Framework



Pro Tip: Focus on trends rather than absolute values. A consistently improving score of 65 is better than a fluctuating score averaging 75.

3. SEO Optimization Checklist & Best Practices

Technical SEO Checklist

- \square Core Web Vitals: LCP < 2.5s, FID < 100ms, CLS < 0.1
- ☐ Mobile-first responsive design implementation
- □ SSL certificate installed and HTTPS redirect active
- ☐ XML sitemap generated and submitted to search engines
- ☐ Robots.txt file properly configured
- ☐ Schema markup implemented for rich snippets
- □ Internal linking structure optimized
- ☐ 404 errors identified and resolved
- Canonical URLs properly set to avoid duplicate content
- ☐ Image alt tags and file names optimized

Content Optimization

Keyword Strategy

- ▶ **Primary Keywords:** 1-2 per page, high search volume
- Secondary Keywords: 3-5 related terms
- ▶ Long-tail Keywords: Lower volume, higher conversion
- **Keyword Density:** 1-2%, natural integration

Content Structure

- ▶ **H1 Tag:** One per page, include primary keyword
- ▶ **H2-H6 Tags:** Logical hierarchy, include keywords naturally
- ▶ Meta Title: 50-60 characters, compelling and keyword-rich
- ▶ **Meta Description:** 150-160 characters, call-to-action included

Performance Optimization Commands

Check Core Web Vitals lighthouse --only-categories=performance [URL] # Analyze
page speed pagespeed-insights [URL] # Bulk SEO analysis screaming-frog-crawl
[domain]

4. Troubleshooting Guide & Problem Resolution

Common Issues & Solutions

Issue	Likely Cause	Solution
Dashboard not loading	Authentication expired	Refresh page, re-login if needed
Data not updating	Integration sync issue	Check Integration & Data Hub status
PDF downloads failing	Browser blocking downloads	Check browser download settings
Slow report generation	Large dataset processing	Reduce date range, apply filters
Missing admin features	Insufficient permissions	Verify user role and subscription tier

Emergency Procedures

Data Sync Failure:

- 1. Navigate to Integration & Data Hub
- 2. Check "Sync Status" column for failed connections
- 3. Click "Retry Sync" for failed integrations
- 4. If issue persists, check API credentials
- 5. Contact support if problem continues beyond 24 hours

Performance Degradation:

- 1. Clear browser cache and cookies
- 2. Disable browser extensions temporarily
- 3. Check internet connection stability
- 4. Try different browser or incognito mode
- 5. Report persistent issues with browser details

5. Advanced Power User Techniques & Shortcuts

Data Export & Analysis

Export Formats Available

CSV: Raw data for spreadsheet analysis

▶ **PDF:** Formatted reports for presentations

▶ **JSON:** API-compatible format for integrations

Excel: Advanced formatting and formulas preserved

Advanced Filtering Techniques

Filter Type	Syntax	Example
Date Range	YYYY-MM-DD to YYYY-MM-DD	2024-01-01 to 2024-12-31
Contains Text	*text*	*marketing* (finds all marketing-related items)
Exact Match	"exact phrase"	"customer acquisition"
Numeric Range	min-max	100-500 (values between 100 and 500)
Exclude	NOT term	NOT test (excludes test data)

Automation Shortcuts

Recurring Reports Setup

- 1. Navigate to desired analytics module
- 2. Configure filters and date range
- 3. Click "Schedule Report" in top-right corner
- 4. Set frequency: Daily, Weekly, Monthly, Quarterly
- 5. Add recipient email addresses
- 6. Choose export format (PDF recommended for executives)
- 7. Save automation rule

Power User Secret: Use browser bookmarks with filtered URLs to instantly access your most important reports. The URL parameters preserve all your filter settings.

Integration Power Features

```
# API Authentication Example curl -H "Authorization: Bearer YOUR_TOKEN" \ https://
cmind-saas.preview.emergentagent.com/api/analytics # Webhook URL Format POST
https://your-domain.com/webhook Content-Type: application/json {"event":
"metric_threshold", "value": 85, "timestamp": "..."}
```

6. Support & Contact Information

Support Channels by Subscription Tier

Tier	Email	Chat	Phone	SLA
Starter (\$49/mo)	/	×	Х	48 hours
Professional (\$149/mo)	1	✓	Х	24 hours
Enterprise (\$399/mo)	✓	✓	/	4 hours
Custom Enterprise	/	/	✓	1 hour

***** Training Resources

- Quick Start Guide: 30-minute platform orientation
- ▶ **Complete Training Manual:** Comprehensive feature documentation
- ▶ Admin Training Manual: Administrative feature guides
- ▶ **Video Tutorials:** Step-by-step visual guides
- Knowledge Base: Searchable help articles

⚠ Critical Issues: For system outages, security incidents, or data loss issues, contact support immediately with "URGENT" in the subject line. Enterprise customers can call the emergency support line.