

Dynamics 365 Customer Insights

Customer Insights in a Day

Hands on Lab Guide

Module 2: Dynamics 365 and Model Driven Apps

V1.1, July 2019

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Feedback

If you have feedback relating to the Customer Insights in a Day content or assets please send to ciadfeedback@microsoft.com.

Module Two Introduction

Having successfully ingested Contoso Coffee's data sources and created a Unified Customer Profile and calculated key measures. You are now able to leverage the insight you have generated to empower different personas within Contoso Coffee.

Empower Customer Service Advisers

As Project Manager for Contoso Retail, you need to empower Contoso Coffee Customer Service Advisors to deliver the best possible experience to customers, in order to achieve the best possible customer satisfaction (CSAT) scores.

In this Module you will deliver insights to Contoso CSAs within their existing Customer Service application (Dynamics 365 for Customer Service) including: Unified Profile, KPIs and Active Segments from Customer Insights.

To do this you will configure the Customer Insights Customer Card Add-In to embed unified and enriched customer data from Customer Insights on the Contact form within Dynamics 365 for Customer Service.

Objectives

- Configure Activities within Customer Insights
- Configure Customer Insights Customer Card Add-In

Prerequisites

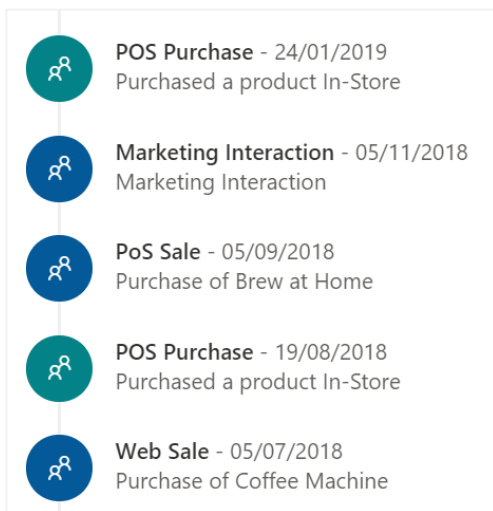
In order to complete this lab you will need

- Completed Module 1 – Data Ingestion and Unification
- Dynamics 365 for Customer Service or Dynamics 365 for Sales (v9.0+)
(You can request a trial [here](#))

Lab 7 – Embed Customer Insights into Dynamics 365

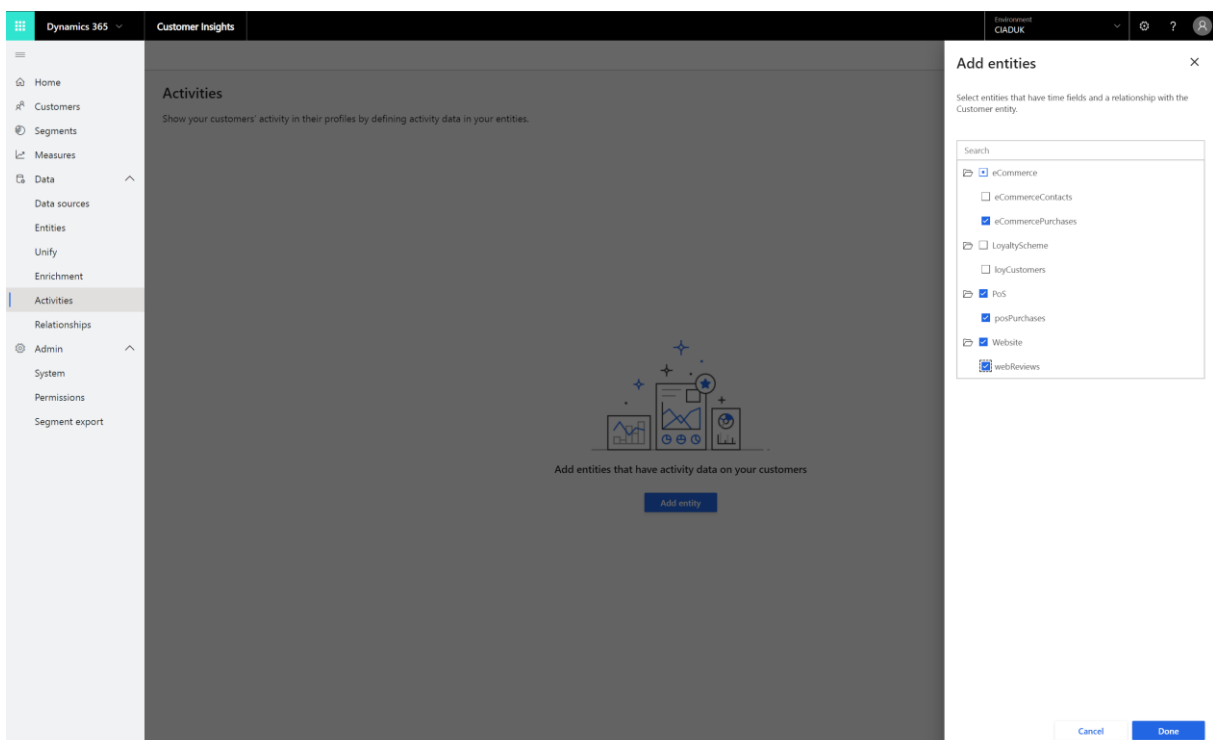
Task 1 – Configure Activities

The Activities capability helps consolidate customer activities from various data sources. This creates a customer timeline view of all customer interactions against your unified customer profile. Business analysts can configure activities to be displayed on a customer dashboard with a timeline view, which can be embedded in business applications.

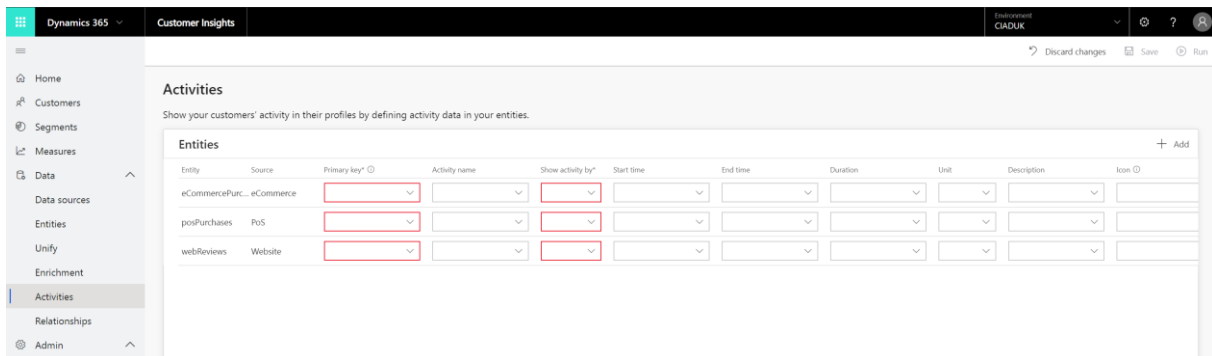


Interactions are any customer touch points – these could include purchases, customer service cases, emails, phone calls, branch visits, web, social activity. In other scenarios interactions could also be data gathered from connected devices, withdrawals or deposits in banking, entry/exist of a premises or area etc.

1. Within Customer Insights, Expand **Activities** on the left menu and click '**add entity**'
2. On the **add entities** fly out, select **eCommercePurchases**, **posPurchases** and **webReviews**. Then click **Done**.



- Back on the Activities page, you should now see your selected entities listed. Here we must select the properties from each interaction type to define them as an activity.



- Entity** (no selection is needed): Specifies your chosen entity's name.
- Source** (no selection is needed): Specifies your chosen entity's data source name.
- Primary key**: This field will be used to distinguish between all of your entity's records. This field should not contain any duplicate values, null values, or missing values. Options include **ActivityID**, **SessionID** and **OrderID**, but there are many others.
- Activity name**: Select the specific field that includes data on your activity.
- Show activity by**: The timeline grid is sorted by date in descending order (from newest to oldest). Decide if you want to show the activity by Start or End time for it to be placed correctly on the timeline. Using this field, choose which of the two options will serve as the primary method for placing the activity on the timeline grid. (In the following example, Start Time was chosen as the primary method.)
- Start time or end time**: Depends on your previous selection. At this point, you should select the field that represents the start/end time. Only one field is required, but you can select both times if those are known for your activity.
- Duration**: Select the field that represents the duration of your activity.
- Unit**: Select the unit of time for the duration of your activity.
- Description**: Select the field that represents a description of the activity
- Icon**: You can add an icon to easily distinguish this activity on the timeline. You can add an icon to your activity if it's publicly available. A URL address or Unicode is required.

- Complete the values as per the below table to map as an activity

Entity	Primary Key	Activity Name	Activity Time	Start Time	Description	Icon
eCommercePurchases	PurchaseId	ActivityTypeDisplay	Start time	Purchase On	Subject	Link

posPurchases	PurchaseId	ActivityTypeDisplay	Start time	Purchased On	Subject	Link
webReviews	ReviewId	ActivityTypeDisplay	Start time	Review Date	Review Text	

5. Next Save your activity definitions and choose run to collate them as activities.
Click **Save** and **Run**.

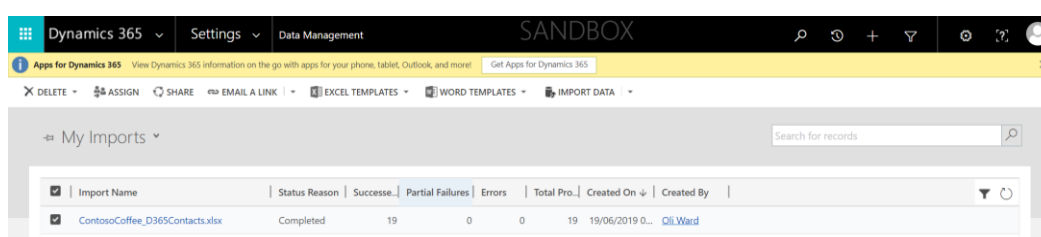
Task 2 – Ingest Dynamics Contact Data

The Customer Insights Cards embedded within Dynamics 365, utilize the Contact ID from Dynamics to identify which profile data to display. In this task you will consume Customer data from Dynamics 365 into Dynamics 365 Customer Insights and Map, Match and Merge it with the existing data-set from Module 1.

Import Contacts into Dynamics 365

First, we will setup some sample Contacts within Dynamics 365 for you to ingest and match against your existing profiles. You will need these contacts for later modules.

1. In a browser, login to your Dynamics 365 Customer Service instance and open the **Customer Service Hub**
2. Click the **Settings** (⚙️) in the top right-hand corner, then **Advanced Settings**
3. On the page that loads, click the chevron next to **Settings** in the menu bar. Then select **Data Management**
4. On the *Data Management* page, click **Imports**
5. In the menu bar, select **Import Data** to launch the data import wizard.
6. Under **Choose File** select the **ContosoCoffee_D365Contacts**. (from the course content), then click **Next**
7. On the first page, select **Contact** as the entity to import
8. On the mapping page, select **Ignore** for **Full Name** then click **Next**, then **Next** then **Submit** and **Finish**
9. You can monitor the progress of your import, using the refresh button on the top right of the grid. – Ensure that your import completes successfully



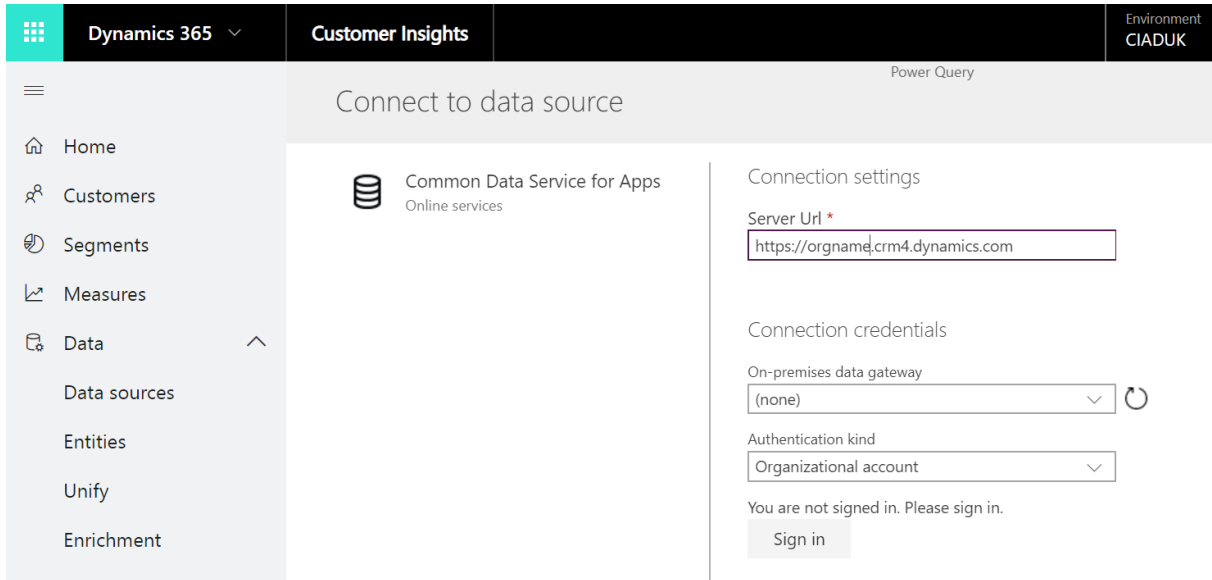
10. Reopen the **Customer Service Hub App** and navigate to **Contacts**
11. Open the record for **Abbie Moss**. Click on the Contact image in the top left of Abbies record to edit the image. Upload the **abbiemoss.jpg** file from the course content.

Ingest

Now we will ingest the Dynamics 365 contacts as an additional data source within Customer Insights.

1. Click 'Data Sources' in the left hand menu
2. Click +Get data from the top right of the page

3. Name the Data Source 'Dynamics365CustomerServ' Click **Next**
4. On the **Choose Data Source** page, select **Common Data Service for Apps**
5. Add your Dynamics 365 URL (e.g. <https://ORGNAME.crm4.dynamics.com>) and click **Sign In**. Sign In with the credentials that you use to access Dynamics 365.



The screenshot shows the 'Connect to data source' window in Power Query. The left-hand navigation pane has 'Data' selected, which has opened a sub-menu with 'Data sources', 'Entities', 'Unify', and 'Enrichment'. In the center, 'Common Data Service for Apps' is selected under 'Online services'. On the right, the 'Connection settings' pane is active. It contains a 'Server Url' field with the text 'https://orgname.crm4.dynamics.com'. Below this, the 'On-premises data gateway' is set to '(none)' and the 'Authentication kind' is set to 'Organizational account'. At the bottom of the settings pane, it says 'You are not signed in. Please sign in.' with a 'Sign in' button.

6. Click **Next**
7. Expand the **Entities** Folder and select the **Contact** table then click **Next**
8. On the Edit Queries Page, you have an opportunity to limit the columns that you wish to ingest.
Click **Manage Columns** → **Choose Columns**. Unselect all the columns, then choose to include only the following:

- contactid
- address1_city
- address1_country
- address1_county
- address1_line1
- address1_line2
- address1_postalcode
- address1_stateorprovince
- emailaddress1
- entityimage_url
- entityimageid
- firstname
- fullname
- gendercode_display
- lastname
- telephone1

Power Query

Edit queries

Get data Refresh Options Manage columns Transform table Reduce rows Add column Map to standard Combine tables

Contact

Table.SelectColumns("navigation 1", {"contactid", "address_city", "address_country", "address_county", "address_line1", "address_line2", "emailaddress", "firstname", "fullname", "lastname"})

	address_city	address_country	address_county	address_line1	address_line2	contactid	emailaddress	firstname	fullname	lastname
1	(null)	(null)	(null)	(null)	(null)	7118dc60-679c-e811-a550...	devguest@OUMARdemo...	Dev	Dev Guest	Guest
2	(null)	USA	(null)	129 Miller Plaza	Fairfield	98a79d76-a45e-e811-a700...	john_lopey@collinsreedan...	John	John Lopey	Lopey
3	(null)	(null)	(null)	(null)	(null)	65623a82-159b-e811-a94f...	(null)	Mike	Mike Armstrong	Armstrong
4	(null)	(null)	(null)	(null)	(null)	6a753760-159b-e811-a94f...	(null)	Arlene	Arlene Cox	Cox
5	(null)	(null)	(null)	(null)	(null)	09f8dc7-159b-e811-a94f...	(null)	Jonathan	Jonathan Marsh	Marsh
6	(null)	(null)	(null)	(null)	(null)	2aef94cd-159b-e811-a94f...	(null)	Eva	Eva Newmann	Newmann
7	Basildon	United Kingdom	(null)	Palace Grove	(null)	613c3161-aad9-e811-a94f...	sarahbrooks@outlook.com	Sarah	Sarah Brooks	Brooks
8	(null)	(null)	(null)	(null)	(null)	75af1d6c-959c-e811-a94f...	OUMAR@OUMARdemo...	Ol	Ol Ward	Ward
9	(null)	(null)	(null)	(null)	(null)	02989b83-830f-e811-a96b...	(null)	JR	JR Biquelme	Biquelme
10	(null)	(null)	(null)	(null)	(null)	53b3d566-5260-e811-a96f...	kenneth_beraun@kimboyl...	Kenneth	Kenneth Beraun	Beraun
11	Inglewood	USA	(null)	3958 Perez Centers	Suite 216	4636a295-5260-e811-a96f...	anthony_koteles@crowfor...	Anthony	Anthony Koteles	Koteles
12	(null)	(null)	(null)	(null)	(null)	8321b547-5360-e811-a96f...	michael_lauser@smithco...	Michael	Michael Lauser	Lauser
13	(null)	(null)	(null)	(null)	(null)	12a60966-5360-e811-a96f...	richard_nakada@joneshol...	Richard	Richard Nakada	Nakada
14	(null)	(null)	(null)	(null)	(null)	a93ec398-5360-e811-a96f...	robert_kaucer@stevensha...	Robert	Robert Kaucer	Kaucer
15	(null)	(null)	(null)	(null)	(null)	4442f6b8-5360-e811-a96f...	steven_biondi@salazarbar...	Steven	Steven Biondi	Biondi
16	(null)	(null)	(null)	(null)	(null)	a26436b6-5360-e811-a96f...	michael_manni@baustitac...	Michael	Michael Manni	Manni
17	(null)	(null)	(null)	(null)	(null)	97a3480a-5460-e811-a96f...	michael_glenna@carterpl...	Michael	Michael Glenna	Glenna
18	(null)	(null)	(null)	(null)	(null)	463d553c-5460-e811-a96f...	james_eller@willsonjohnso...	James	James Eller	Eller
19	Redmond	USA	(null)	8201 164th Avenue NE	Suite 200	99b851a2-c34e-e111-bb8...	customer@contoso.com	Portal	Portal Customer	Customer
20	Redmond	USA	(null)	8201 164th Avenue NE	Suite 200	7460f895-c36d-4236-90b...	admin@contoso.com	System	System Administrator	Administrator

9. Then click **Create**.

Map

1. Click **Unify → Map**
2. Under **Entities** click **Select**
3. Check the box for **Contact** under **D365CustomerServ**
4. Under **Entities** click the D365CustomerServ Contact item.
As when you ingested Loyalty and eCommerce data, you should see that Customer Insights has intelligently mapped the attributes to the Common Data Model types.
5. Click **Edit** in the top right hand corner and ensure that all attributes are included.
6. Where an attribute hasn't been mapped to the Common Data Model, map as follows

Column Heading	New Data Type
telephone1	Identity.Service.Phone
Address1_line1	Location.Address.Street
Address1_line2	Location.Address.Street
Address1_line3	Location.Address.Street
entityimage_url	Reference.ImageURL
Entityimageid	ID
gendercode_display	Gender

7. Select **contactid** as the Primary Key
8. Click **Save**

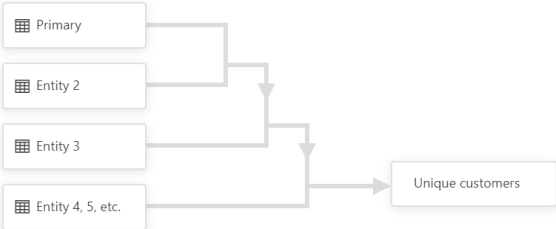
Entities	Select	Fields in Contact
eCommerce eCommerceContacts		<div>Name</div> <div>Primary key ⓘ</div> <div>Type</div>
LoyaltyScheme loyCustomers		<div>address1_country</div> <div><input type="radio"/></div> <div>Location.Country</div>
		<div>address1_county</div> <div><input type="radio"/></div> <div>Location.County</div>
D365CustomerServ Contact		<div>address1_postalcode</div> <div><input type="radio"/></div> <div>Location.PostalCode</div>
		<div>address1_stateorprovince</div> <div><input type="radio"/></div> <div>Location.State</div>
		<div>contactid</div> <div><input checked="" type="radio"/></div> <div>ID</div>
		<div>emailaddress1</div> <div><input type="radio"/></div> <div>Identity.Service.Email</div>
		<div>entityimageid</div> <div><input type="radio"/></div> <div>ID</div>
		<div>firstname</div> <div><input type="radio"/></div> <div>Person.FirstName</div>
		<div>fullname</div> <div><input type="radio"/></div> <div>Person.FullName</div>
		<div>lastname</div> <div><input type="radio"/></div> <div>Person.LastName</div>
		<div>telephone1</div> <div><input type="radio"/></div> <div>Identity.Service.Phone</div>
		<div>address1_line1</div> <div><input type="radio"/></div> <div>Location.Address.Street</div>
		<div>address1_line2</div> <div><input type="radio"/></div> <div>Location.Address.Street</div>
		<div>address1_line3</div> <div><input type="radio"/></div> <div>Location.Address.Street</div>
		<div>entityimage_url</div> <div><input type="radio"/></div> <div>Reference.ImageURL</div>
		<div>gendercode_display</div> <div><input type="radio"/></div> <div>Gender</div>

Match

1. Click **Unify** → **Match**
2. Click **Edit** next to **Match Order**
3. **Add Entity** and select *Contact : Dynamics365CustServ* and check **Include All Records** and then click **Done**.

Match order ×

Entities are matched in the order you set. After the first two entities, every entity matches their records to what has been identified as a unique customer.



Set order of entities
If you include all records, every record in the entity will be a unique customer and matched to every following entity.

Primary ⓘ	eCommerceCon... ▾	<input checked="" type="checkbox"/> Include all records	×
Entity 2	loyCustomers : L... ▾	<input checked="" type="checkbox"/> Include all records	×
Entity 3	Contact : Dyna... ▾	<input checked="" type="checkbox"/> Include all records	×

Cancel
Done

4. You will see that this new addition required a new rule. Click **Create New Rule**.

5. Name the Rule **Email Match**

For the conditions, select

- Entity as **eCommerceContacts** and Field as **Email**
- Entity as **Contact : D365CustomerServ** and Field as **emailaddress1**
- Set the Match precision to **Medium** and click **Done**.

Edit rule

Set conditions on how you will match by choosing equivalent fields in entities.

Name *

Email Match

Conditions

Entity	Field	Precision
eCommerceContacts : eCo...	Email	<div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>
Entity	Field	Normalize
Contact : D365CustomerServ	emailaddress1	Select options

+ Add condition

Cancel Done

6. Click **Save** and **Run**

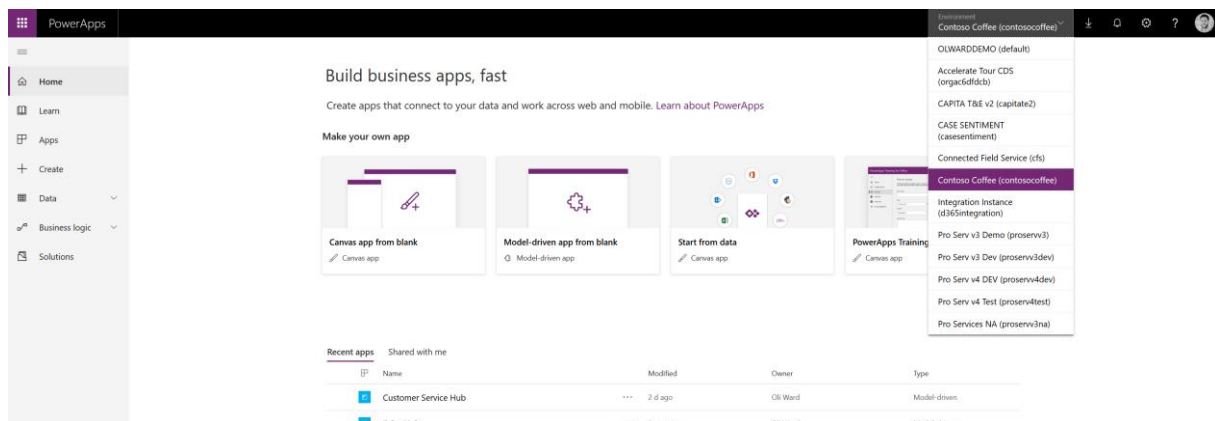
Merge

1. Click **Unify → Merge**
2. You should see that Contactid from Dynamics 365 has been added to the list of attributes that will make up the Unified Profile
(Note, if this attribute has been merged, do separate it)
3. You can **optionally** add the remaining attributes and identify them as 'Merge' attributes where an attribute already exists (e.g. First Name, Last Name, Full Name, Gender and gerndercode_display).
4. Click **Save** and then **Run**

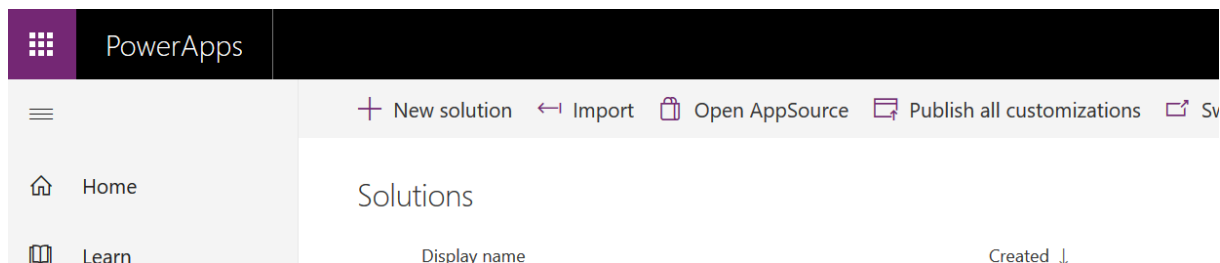
Task 3 – Install the Customer Insights Customer Card Add-in

The first step is to install the Customer Insights Customer Card Add-In, that will enable you to embed Unified Profile and Insight from Customer Insight, directly within an existing Dynamics 365 experience for Contoso Coffee Customer Service Advisors.

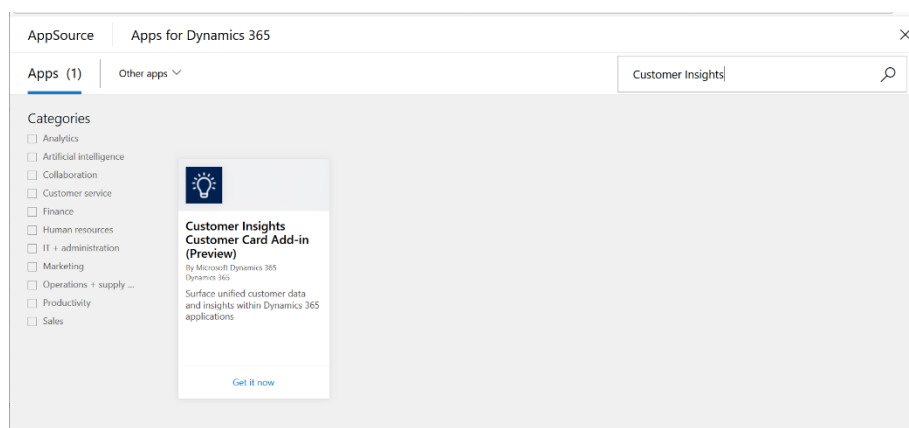
1. Log in to your Dynamics 365 for Customer Service instance.
Note: If you do not have an instance that you can use, you can sign-up for a trial here.
– <https://trials.dynamics.com>.
2. Navigate to <https://powerapps.microsoft.com> and select your Dynamics 365 for Customer Service instance from the **Environment** drop down



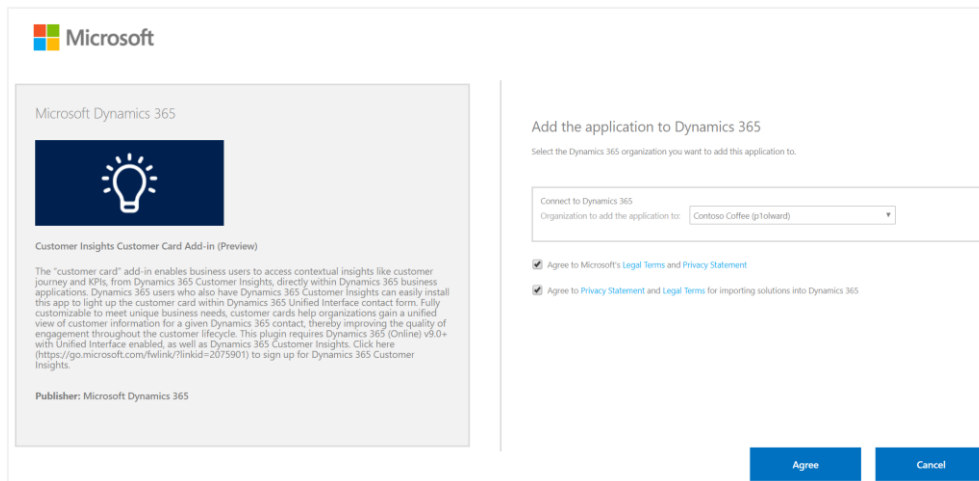
3. Once selected, click **Solutions** on the left-hand menu.
4. Click **Open AppSource** from the top of the page



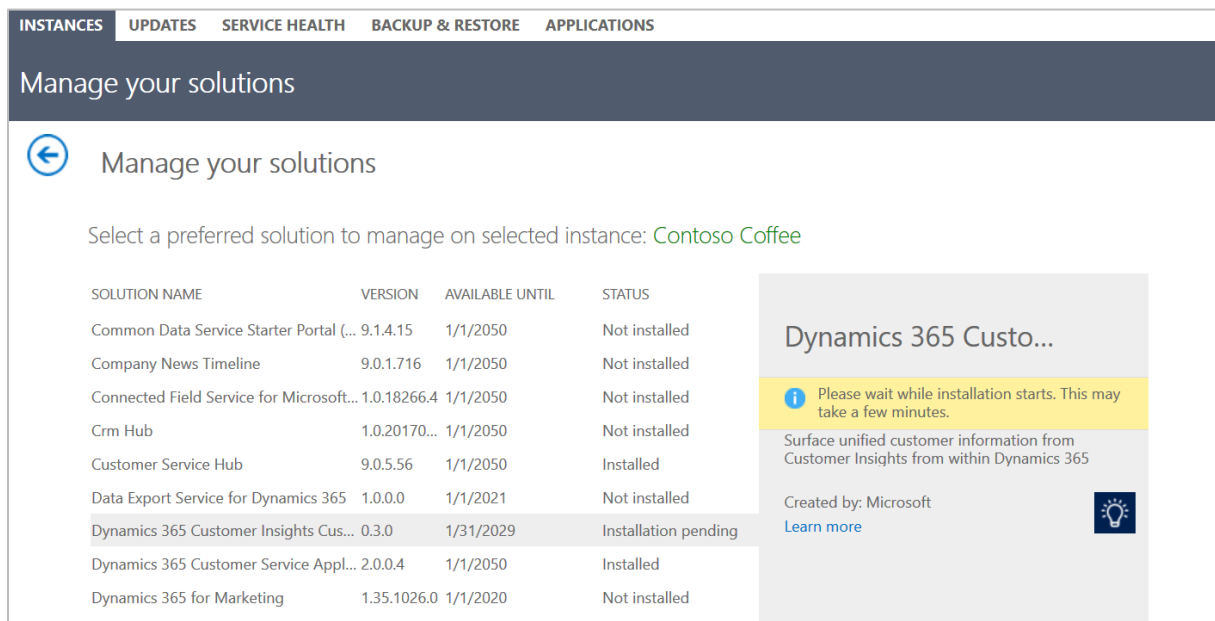
5. On the AppSource window that opens, search **Customer Insights**. You should see **Customer Insights Customer Card Add-in** in the results. Click **Get it now**.



6. Complete your details on the **One more thing...** page. Including **Name, email, and Phone Number**. Then provide your consent and click **Continue**.
7. On the next page you should see details of the Customer Insights Customer Card Add-In. To the right you can select the Dynamics 365 instance into which you wish to install the solution. **Select your preferred instance, Agree to the Legal Terms and Privacy Statement** then click **Agree**.

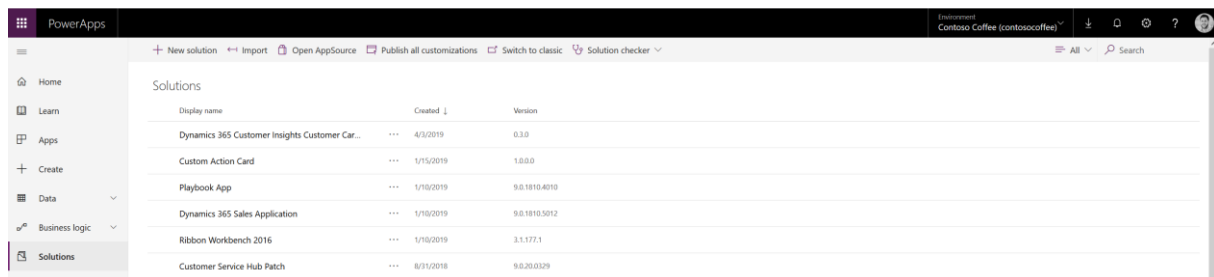


8. This will begin the installation process. You can check the status of the install on the page that opens. (You may need to refresh it for updates).



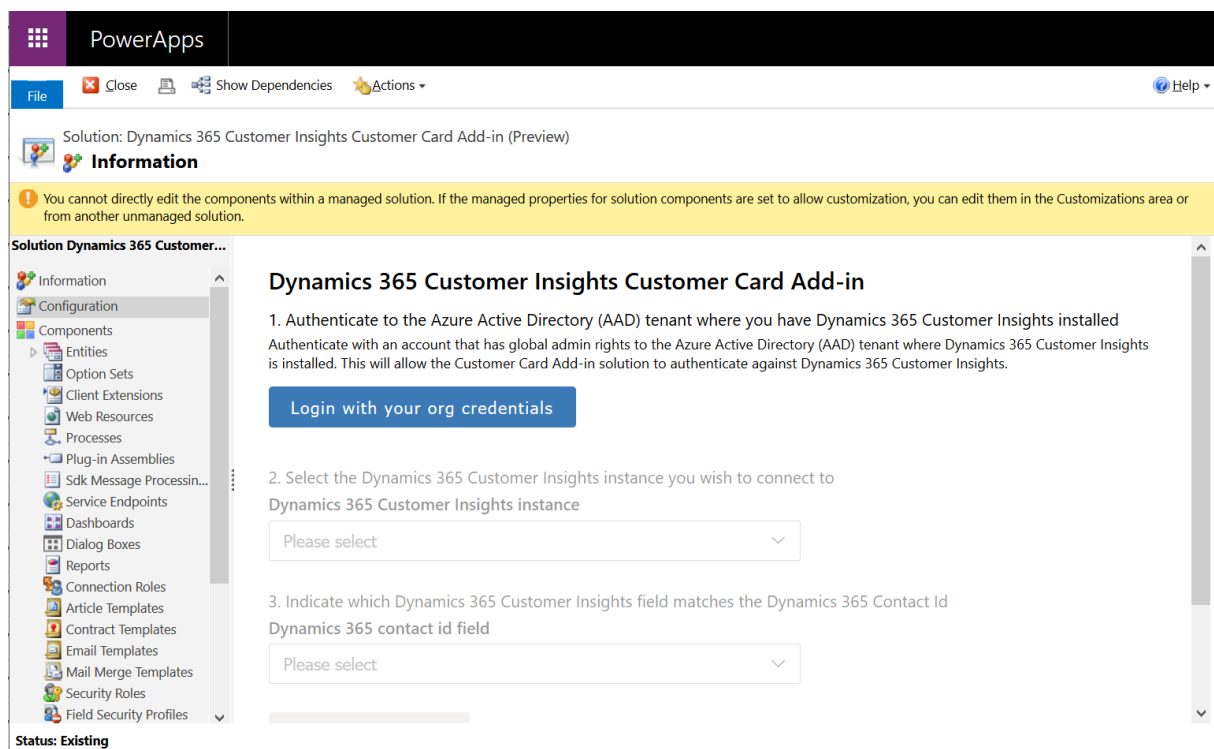
SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
Common Data Service Starter Portal (...)	9.1.4.15	1/1/2050	Not installed
Company News Timeline	9.0.1.716	1/1/2050	Not installed
Connected Field Service for Microsoft...	1.0.18266.4	1/1/2050	Not installed
Crm Hub	1.0.20170...	1/1/2050	Not installed
Customer Service Hub	9.0.5.56	1/1/2050	Installed
Data Export Service for Dynamics 365	1.0.0.0	1/1/2021	Not installed
Dynamics 365 Customer Insights Cus...	0.3.0	1/31/2029	Installation pending
Dynamics 365 Customer Service Appl...	2.0.0.4	1/1/2050	Installed
Dynamics 365 for Marketing	1.35.1026.0	1/1/2020	Not installed

9. Once installation is complete, you can close this browser tab and return to the **solutions** area on <https://powerapps.microsoft.com>, where you should see the **Dynamics 365 Customer Insights Customer Card Add-In** installed.



10. Click **Switch to Classic** at the top of the page

11. Double click the **Dynamics 365 Customer Card Add-In** solution. You should see the **Configuration Page**. If not, click **Configuration** from the left menu.



12. Click **Login with your org credentials** and sign-in with your account used for **Customer Insights**.


13. Once connected, select your Customer Insights Instance in the drop down.

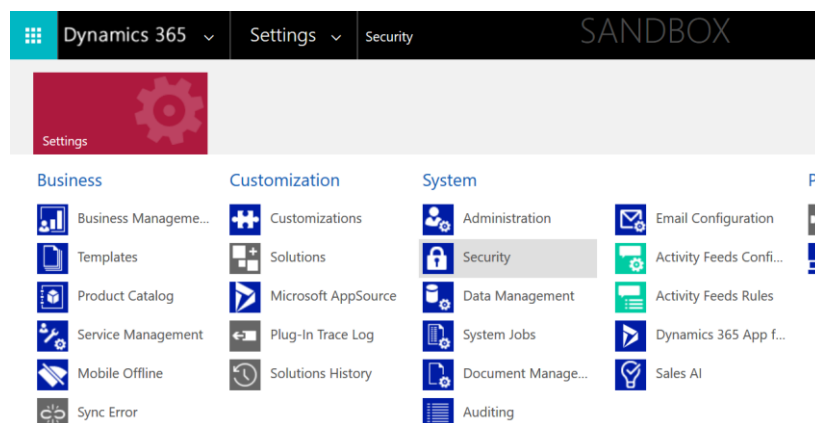
14. From the drop-down select the attribute from your customer profile that represents the Dynamics 365 Contact Id.
(**System.Customer.D365CustomerServ.Contact.contactid**).

Task 4 – Add Security Roles

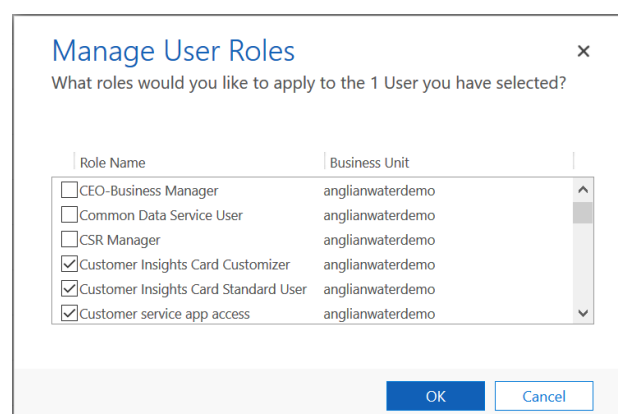
For users to either configure or view the Customer Insights content embedded within the Dynamics 365 form, you will need to assign them the appropriate Security Role.

Next you will need to assign the following user roles:

- **Customer Insights Customizer:** Assign this role to the users who will customize the content to be shown on the card for the whole organization.
 - **Customer Insights Card Standard User:** Assign this role to the users who will use the card for consumption, but who won't customize it.
1. Open the **Customer Service Hub** app in Dynamics 365 instance. (or Dynamics 365 for Sales). Click the Cog  in the top right-hand corner → **Advanced Settings**. This should open Dynamics 365 classic Web App in a new tab.
 2. Click the arrow next to settings and choose '**Security**'



3. Click **Users**
4. Select your user account (and any others that you wish to be able to view or edit Customer Insights Cards). Click **Manage Roles**.
5. Add the **Customer Insights Card Customiser** and **Customer Insights Card Standard User** roles as shown below. And click **OK**.



Task 5 – Add the Customer Insights Customer Card Controls to the Contact Form.

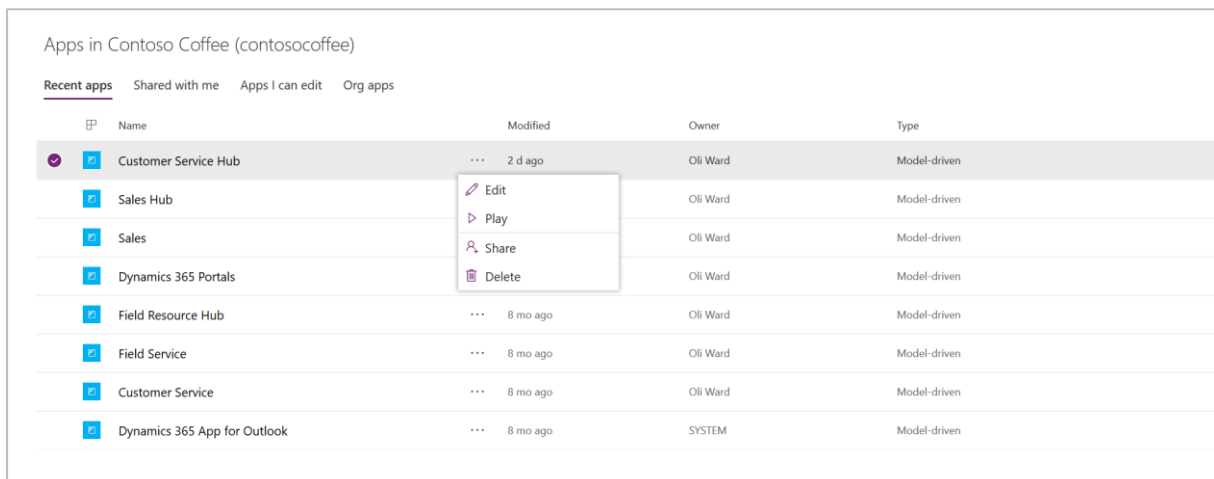
We will now configure a Dynamics 365 Contact form, used by Contoso Coffee CSAs to display the embedded Cards and from Customer Insights.

Note: If you still have the tab open from the previous task and are familiar with the classic Dynamics 365 Customization experience, you can access the 'Customizations' area from your open tab & jump to step 4.

1. Navigate to <https://powerapps.microsoft.com> and select your Dynamics 365 for Customer Service instance from the Environment drop down
2. Click **Apps** on the left menu. You will be shown a list of apps installed into your Dynamics / CDS instance.

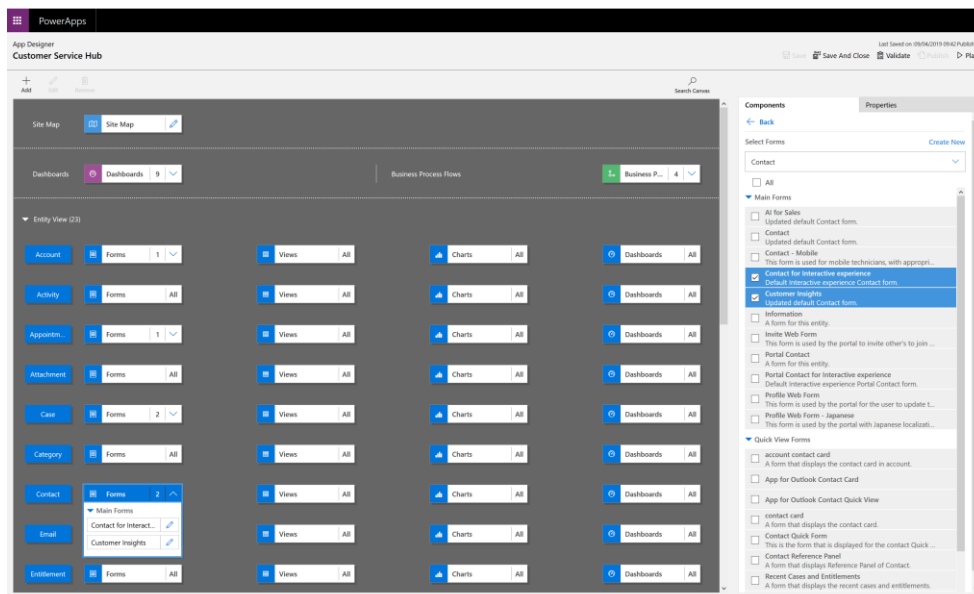
For the next steps we suggest you edit the **Customer Service Hub** app, but you can alternatively use the **Sales Hub** or a custom **Model Driven App** if you do not have this available.

3. Click the **More Commands '...'** button for the **Customer Service Hub** app and click **Edit**.

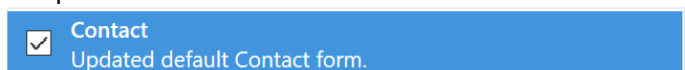


Name	Modified	Owner	Type
Customer Service Hub	2 d ago	Oli Ward	Model-driven
Sales Hub		Oli Ward	Model-driven
Sales		Oli Ward	Model-driven
Dynamics 365 Portals		Oli Ward	Model-driven
Field Resource Hub	8 mo ago	Oli Ward	Model-driven
Field Service	8 mo ago	Oli Ward	Model-driven
Customer Service	8 mo ago	Oli Ward	Model-driven
Dynamics 365 App for Outlook	8 mo ago	SYSTEM	Model-driven

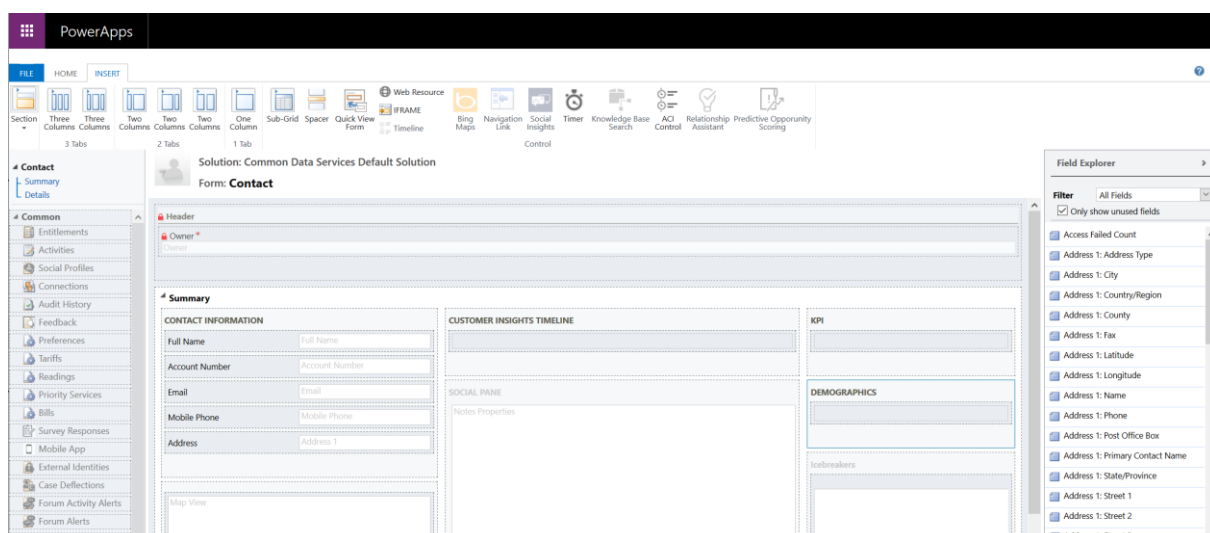
4. You should now see the PowerApps App Designer has opened. Scroll down and expand the **Forms** menu for the **Contact** entity.



5. Ensure that the default Contact form (**Contact**) is selected and click the edit button (pencil) to edit the form. The button will appear when you hover over the form in the components list



6. You should now be presented with the 'Edit Form' page. Click **Save As** in the top left corner and save a copy of this form, setting the name to **Customer Insights**. Then click **OK**.
7. Add three new sections within the Summary tab. Name them – **CUSTOMER INSIGHTS TIMELINE**, **KPI** and **DEMOGRAPHICS** as shown below.



8. Drag a field from the Field Explorer into each section you added.
e.g. **Address1_City**. Ensure that the Fields are set to be **Visible** by default, and that the *Display label on the form* is **not selected**

Field Properties

Modify this field's properties.

? X

Display
Formatting
Details
Events
Business Rules
Controls

Label
Specify the label for this field in forms.
Label *
Address 1: City
☐ Display label on the form

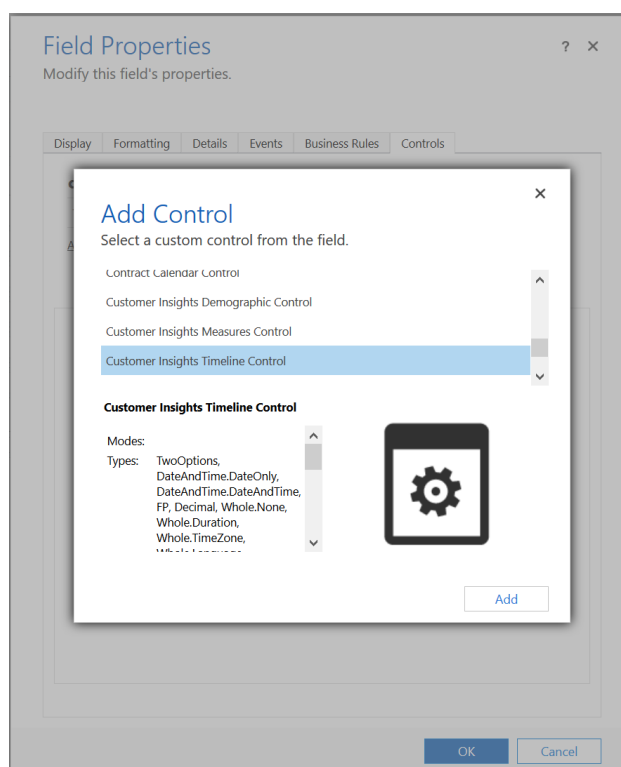
Field Behavior
Specify field-level behavior
☐ Field is read-only

Locking
Specify whether to lock this field on the form.
☐ Lock the field on the form

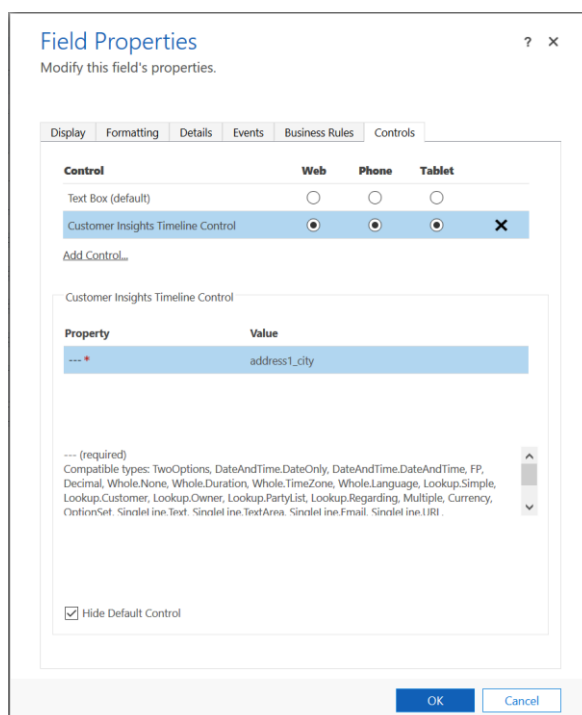
Visibility
Specify the default visibility of this control.
☒ Visible by default

The screenshot shows the PowerApps interface for a 'Contact' form. The 'Customer Insights Timeline' section is visible, containing a field for 'Address 1: City'. The 'Field Explorer' on the right lists various fields, including 'Address 1: City'.

- Double Click the field you added in the **Customer Insights Timeline** section.
Uncheck the **'Display Label on the Form'** property
 Open the **Controls** tab and click **Add Control...**
 Scroll down the list and choose **Customer Insights Timeline Control** then click **Add**



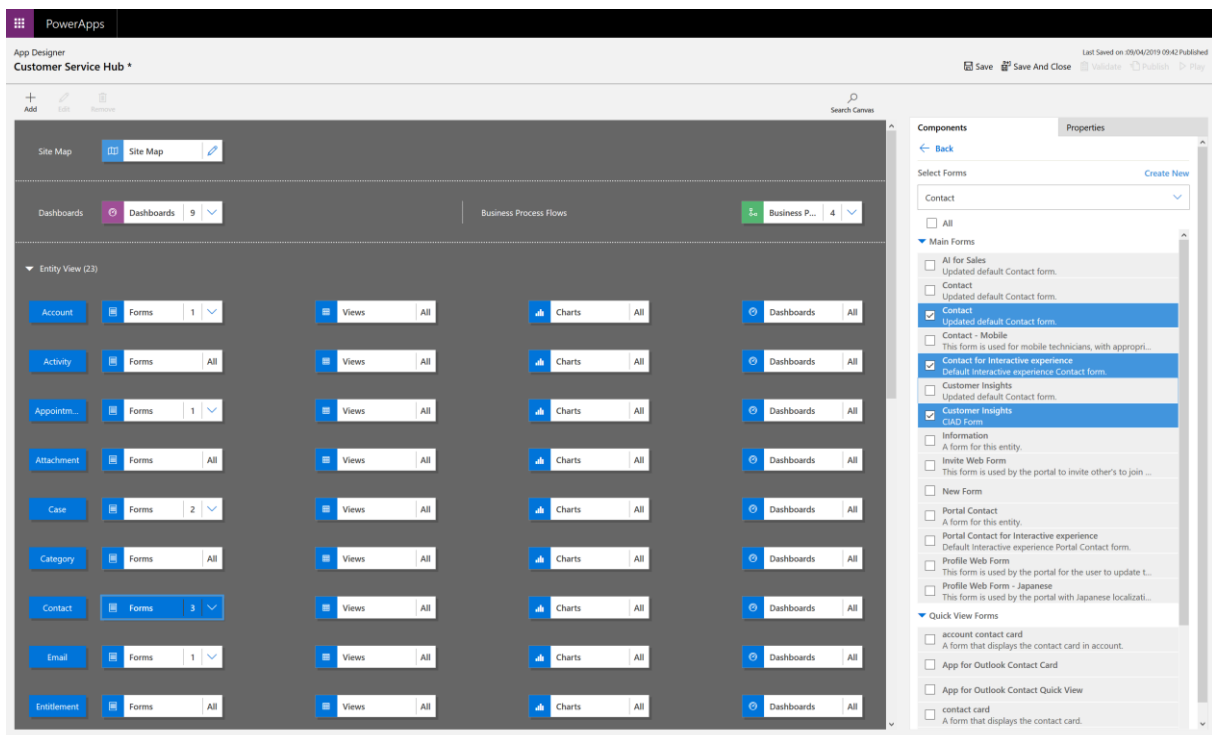
10. Set the control to appear on **Web**, **Phone** and **Tablet** and check the **Hide Default Control** checkbox.



11. Repeat steps 9 and 10 for the fields added into the **KPI** and **DEMOGRAPHICS** section, adding the **Customer Insights Measure Control** to KPI section and the **Customer Insights Demographic Control** to the Demographics section.

12. **Save and Close** your form

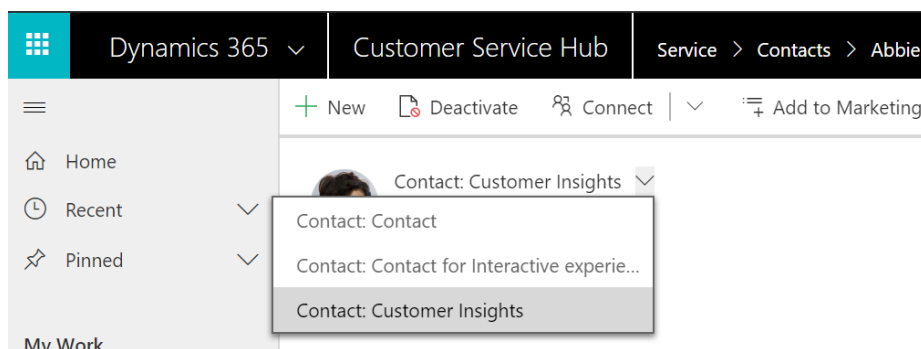
13. Back on the **App Designer**, select to add your new **Customer Insights** form to the **Customer Service Hub** app.



14. Click **Save** in the top right hand corner and then **Publish**.

Task 6 – Configure the Customer Insights Customer Card Add-in

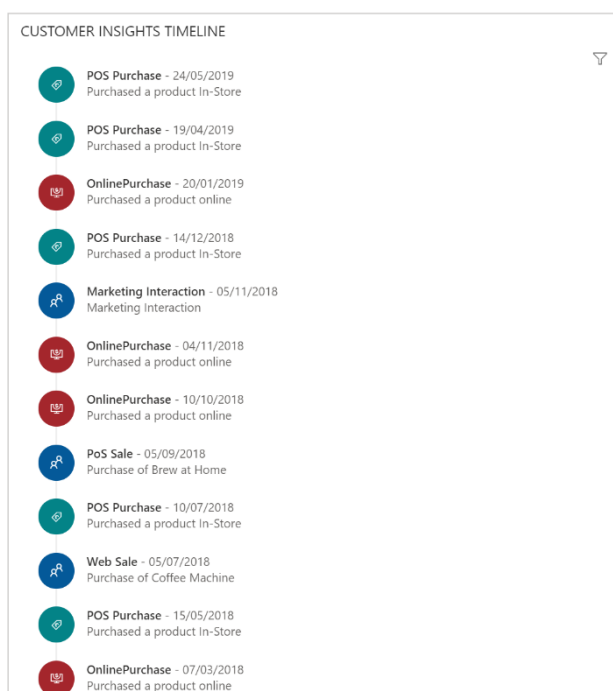
1. Open your Dynamics 365 for Customer Service instance
2. Navigate to the Contacts area via the left hand menu. Open the Contact record for Abbie Moss and select your new **Customer Insights** form using the form selector.



3. You should now see that the three Customer Insights you embedded in the form render. But KPI and Demographics control can be configured.

As you assigned your user the **Customer Insights Card Customiser** security role in Task 5, you can do this. The results of your configuration completed here will be visible for all users with the **Customer Insights Card Standard User**.

Timeline:



No configuration required. This should display a unified set of ingested activities from Customer Insights.

Demographic

The demographic control should display some key information from the Unified Customer Profile. Click the **Edit** button to customise the information that appears.

Add the **LoyaltyId**, **Segments** components to have them displayed. Add any additional items that you believe may be helpful to a Customer Service Advisor

DEMOGRAPHICS

FullName	Abbie Moss
City	Fairfield
Country	USA
LoyaltyId	LOYID_1000
Segments	<div>Customers with High Value Purchase</div> <div>Customers with Lower than Ave In Store Spend</div> <div>HighValueOnlineCustomers</div>

KPIs

KPI

Total Club Points	773
Lifetime Spend (\$)	5322
AveStorePurchase	104.6

Click **Edit** on the KPI controls. Here you're able to select from any of the Customer Measures that you created earlier. Add your Customer Measures to give the Contoso Coffee CSA visibility. (**Total Club Points**, **Lifetime Spend (\$)** and **Average Store Purchase (\$)**)

Dynamics 365
Customer Service Hub
Service > Contacts > Abbie Moss

SANDBOX

Oli Ward

Home
Recent
Pinned

My Work
Dashboards
Activities
Customers
Accounts
Contacts
Social Profiles
Service
Cases
Queues
Knowledge Articles

Contact: Customer Insights
Abbie Moss

Summary
Details
Related

CONTACT INFORMATION

First Name: Abbie
Last Name: Moss
Account Number: ---
Email: abbie_moss@collinsreedandhoward.com
Mobile Phone: ---
Address 1: Street 1: 129 Miller Plaza
Address 1: Street 2: Fairfield
Address 1: Street 3: California
Address 1: City: ---
Address 1: State/Province: ---
Address 1: ZIP/Postal Code: 10753
Address 1: Country/Region: USA

129 Miller Plaza Fairfield

CUSTOMER INSIGHTS TIMELINE

POS Purchase - 24/05/2019
Purchased a product In-Store

POS Purchase - 19/04/2019
Purchased a product In-Store

OnlinePurchase - 20/01/2019
Purchased a product online

POS Purchase - 14/12/2018
Purchased a product In-Store

Marketing Interaction - 05/11/2018
Marketing Interaction

OnlinePurchase - 04/11/2018
Purchased a product online

OnlinePurchase - 10/10/2018
Purchased a product online

PoS Sale - 05/09/2018
Purchase of Brew at Home

POS Purchase - 10/07/2018
Purchased a product In-Store

Web Sale - 05/07/2018
Purchase of Coffee Machine

POS Purchase - 15/05/2018
Purchased a product In-Store

OnlinePurchase - 07/03/2018
Purchased a product online

KPI

Total Club Points: 773
Lifetime Spend (\$): 5322
AveStorePurchase: 104.6

DEMOGRAPHICS

FullName: Abbie Moss
City: Fairfield
Country: USA
LoyaltyId: LOYID_1000
Segments:

Customers with High Value Purchase

Customers with Lower than Ave In Store Spend

HighValueOnlineCustomers

Your final Contact form should appear similar to that above.
Congratulations! You have successfully completed the objectives of this module, providing Contoso Coffee Customer Service Advisors with visibility of all customer touchpoints and KPIs.