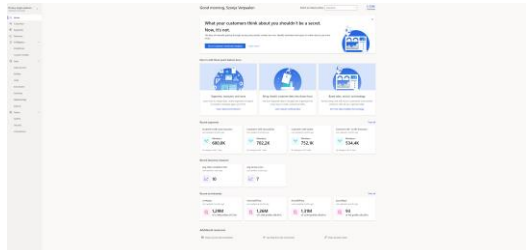


Log in:  
<https://home.ci.ai.dynamics.com/>  
Log in with your (newly created) Office 365 credentials.

## Home



The homepage contains your four most recently created segments as well as any business measures (KPIs) and third-party enrichments of your customer data.

## Navigate

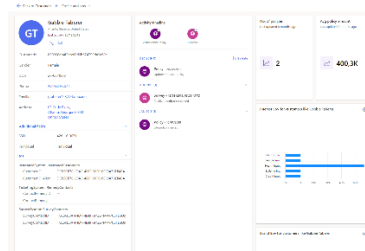
On the left you'll see a menu to navigate to every part of the environment. From here you can navigate to the following pages:

- Customers: Overview of all customers within the environment.
- Segments: Create new segments or see earlier segments.
- Measures: Creating KPIs and calculated customer attributes.
- Intelligence: Use machine learning to get insight on (future) customer behaviour.
  - Predictions: Pre-built machine learning models.
  - Custom models: Self-made models by Azure ML brought into CI.
- Data: All data management happens within this menu item.
  - Data sources: Import and edit existing data.
  - Entities: Check all running processes.
  - Unify: Define customer fields.
  - Enrichment: Enhance data with third-party data

- Activities: Define customer activities for timeline.
- Relationships: Set relationships between data sources.
- Exports: Create and manage exports.
- Admin: Scheduling and security settings.
- System: Task statuses and refresh schedules.
- Security: Access management for users.
- Connections: Exports and imports of third-party data.

## Customers

In the customer profile you can see the fields added in the unification process as well as an activity timeline, customer attributes and enrichments. Only available after completing unification.



Search for customers with the top bar.

## Segments

Build your own segments or find suggestions as well as insights on existing segments by comparing members in 2/3 segments or finding the differentiators. Another option is to create quick segments which will give you a preview of the results before saving.

Display name	Tags	Type	State	Status	Members	Last refreshed
Customers with no life insurance		Dynamic	Active	Successful	124,827	6 months ago
Customers with auto insurance		Dynamic	Active	Successful	89,084	6 months ago
Customers with auto insurance plus		Dynamic	Active	Successful	100,776	6 months ago
Customers with claims		Dynamic	Active	Successful	72,088	6 months ago
Customers with no claims		Dynamic	Active	Successful	149	6 months ago

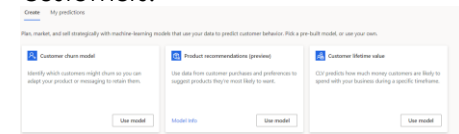
## Measures

With measures you can track your organisation's performance on a business level as well as customer level. You can create them from scratch or choose any of the pre-configured templates for popular KPIs.

Display name	Tags	Type	State	Created on	Status	Refreshed
No. of policies		Customer attribute	Active	Custom	Successful	6 months ago
Avg policy amount		Customer attribute	Active	Custom	Successful	6 months ago
Avg claim resolution time		Business measure	Active	Custom	Not started	None
Avg survey score		Business measure	Active	Custom	Not started	None

## Intelligence

The custom models have to be brought in from Azure to be used within CI. Under Predictions you can find four pre-built models. These models enable you to predict customer churn, customer lifetime value, customer sentiment and extract product recommendations based on earlier purchases and insights from other customers.

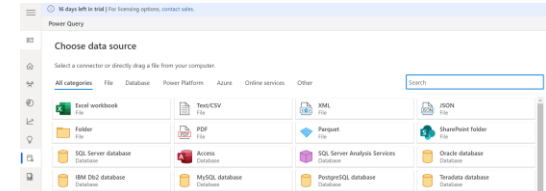


## Data

This collapsible menu item is by far the biggest one within CI. This is the heart of the environment with all its different components.

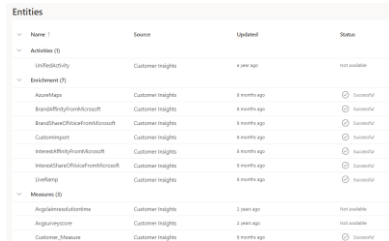
## Data sources

Within you can add new data and explore available out of the box connectors.



## Entities

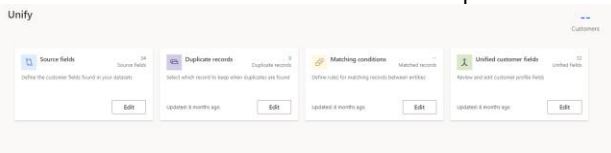
will show you all existing data within the environment as well as any status updates. Clicking on an entity enables you to see all attributes and data within it.



Name	Source	Updated	Status
Activities (2)			
unifiedActivity	Customer Insights	4 years ago	Not available
Activities (2)			
AccountInfo	Customer Insights	4 months ago	Successful
BrandAffinityRankingSource	Customer Insights	4 months ago	Successful
BrandShareOfVoiceRankingSource	Customer Insights	4 months ago	Successful
CustomerSupport	Customer Insights	4 months ago	Successful
InterestAffinityRankingSource	Customer Insights	4 months ago	Successful
InterestShareOfVoiceRankingSource	Customer Insights	4 months ago	Successful
Unifany	Customer Insights	4 months ago	Successful
Measures (2)			
AugmentedCustomer	Customer Insights	4 years ago	Not available
AugmentedCustomer	Customer Insights	4 years ago	Not available
Customer_Segment	Customer Insights	4 months ago	Successful

## Unification

The next step after adding data sources is always the unification process (Unify) where we define the unified customer profile.



Unify

Customers

Source fields: Select the customer fields to include in your dataset. [Edit]

Duplicate records: Select which record to keep when duplicates are found. [Edit]

Matching conditions: Define rules for matching records between entities. [Edit]

Unified customer fields: Review and edit customer profile fields. [Edit]

In the first step you will be selecting the fields and entities you want to include. Afterwards you filter out any duplicates within entities and define rules to find matching records between entities. The last step of the unification process consists of prioritising entities for every customer field, what can be done by dragging fields up or down. Before running the process double check your choices as it's not possible to delete sources that have already been unified.

## Enrichment

You can enhance your data by adding third-party data. Make sure to select the customer dataset if necessary and map the correct fields.

## Activities

you can set up a unified activity timeline on the

customer profile, which will enable you to segment and create measures based on touchpoints. All activity entities need to have at least an id, an activity type, a customer field and a date.

## Relationships

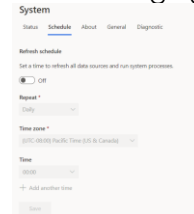
Gives you an overview of any created relationships and also lets you create new relationships. To help you get a better idea of the defined relationships you can click on the visualiser which will give you a diagram.

## Exports

This allows you to use segments created in CI within other platforms such as Google, Facebook and Snapchat. You need to log in to these platforms when setting up the connection.

## Admin

Admin makes sure everything is regularly updated, only the right people have access to the right functionalities within the environment and managing connections.



System

Refresh schedule

Set a time to refresh all data sources and run system processes.

Refresh schedule: ☐ Off

Repeat:  times

Time zone:

Time:

Click to add another time zone

Save

**System** allows you to manage tasks as well as set a refresh schedule. Within Security you can add users with roles like admin and viewer and connections combines all external connections whether it concerns an import of third-party data or export of insights from CI.

## Common issues within CI (trial) environment

### **You can't create a new business entity**

Create the business entity in a different way. Ask your trainer for the instructions on the alternative way.

### **Data source can't connect/be added**

Click on another menu item on the left and go back to data sources right after. Now you can try again. If it doesn't work after a few tries you might have to ask for support from Microsoft depending on the exact error you get.

### **Created activity doesn't show up in the timeline**

Take a look at the status details to make sure everything has fully loaded. Usually there are some invisible processes still running before the activities show up.

### **Measure result is 0 everywhere**

Make sure every process has fully loaded including the changes to the customer profile and refresh your screen. The results should show up now. Keep in mind that some customers might actually have '0' as outcome so check out another customer as well.

### **Suggested segment functionality gives no results**

Sometimes you don't have the right data (selected) to create good suggestions. You can delete the run and select other attributes. This makes sure the suggestion uses other data which can help making it work.

