



Accelerate Customer Insights Package

Version 1.4

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Accelerate Customer Insights Package

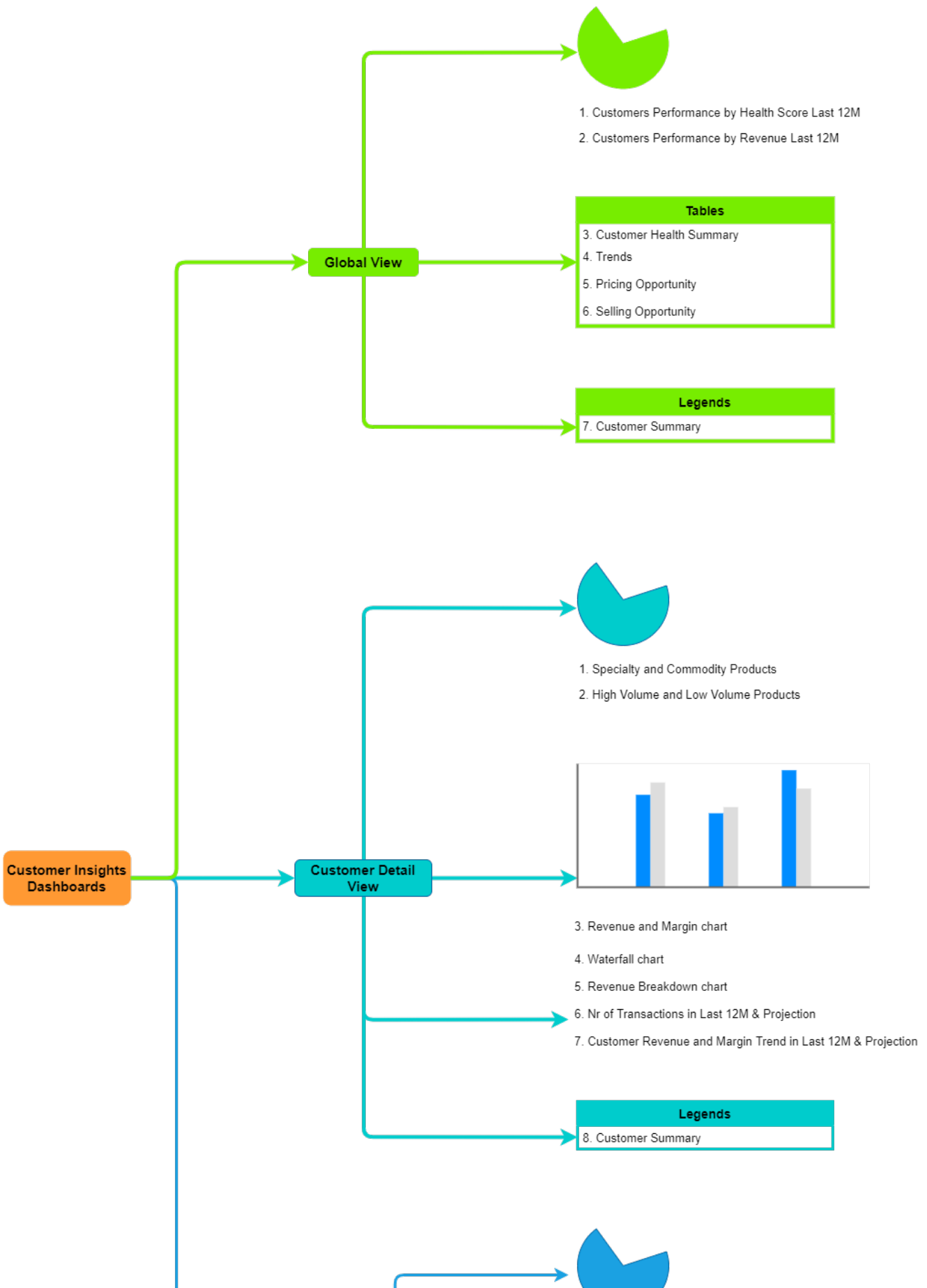
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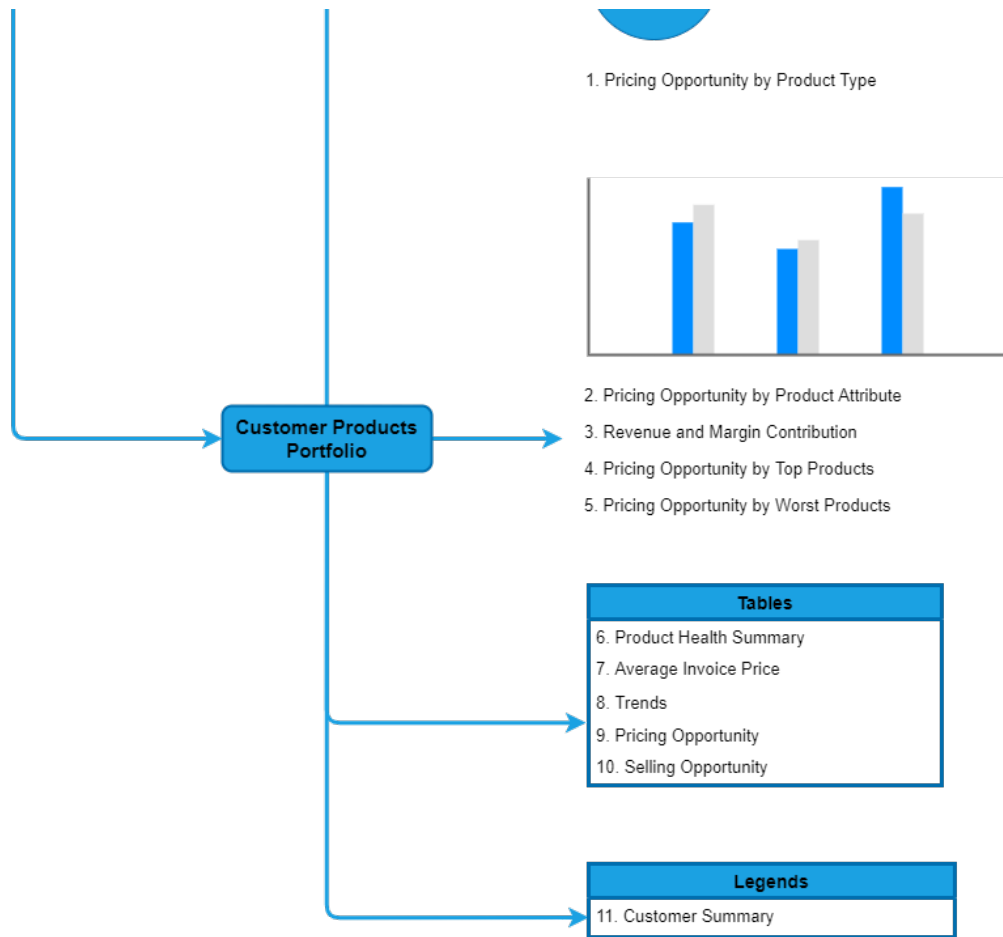
Customer Insights Dashboard Introduction

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1. Overview

Customer Insights Dashboards consist of three separate dashboards which provide an overview of the trading performance of a customer group. They also support analysis of an individual customer's performance.





2. User Inputs

2.1 Global View

Name	Values
Customer(s)	
Time Filter	MTD, QTD, YTD, L12M, L6M, L3M
Top/Worst Customers	5,10, 50, 100
KPI	Revenue, Margin %, Volume, Health Score
Customer Class	A, B, C, D (Multiselect is enabled)
Customer Health Score	Excellent, Normal, Low, Problematic (Multiselect is enabled)

2.2 Customer Detail View

Name	Values
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Customer	
Time Filter	MTD, QTD, YTD, L12M, L6M, L3M
Category (+ Value)	E.g.: Product ID, Product Group
Product Class	Very High, High, Normal, Low (Multiselect is enabled)
Product Health Score	Excellent, Normal, Low, Problematic (Multiselect is enabled)

2.3 Customer Products Portfolio

Name	Values
Customer	
Product Attribute	Relevant product related dimensions, by default it is Product Group.
Time Filter	MTD, YTD, L12M, L6M, L3M
Top/Worst Products	5, 10, 50, 100
Product Class	Very High, High, Normal, Low (Multiselect is enabled)
Product Health Score	Excellent, Normal, Low, Problematic (Multiselect is enabled)

2.4 Look

Global View	Customers Detail View	
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Customer Insights - Global View

DATA FILTER

Customer(s) Customer Type Ind...

* Time Filter YTD

* Top/Worst C... 20

* KPI Health Score

Customer Class (A X) (B X) (C X)

Customer Health (Normal X) (Low X) (Excellent X)

Customer Insights - Customer Detail View

DATA FILTER

Customer CD-00002

* Time Filter YTD

Category Product Group

Value Meatball

Product Class High X Very High X

Product Health Score Normal X Excellent X

Customer I

DATA FILTER

Cu

* Product A

* Tim

* Top/Worst P

Produ

Product Healt

2.5 Filter Rules

Does not apply

Dashboards	Portlets		User Inputs					
			Customer(s)	Time Filter	Top/Worst Customers	KPI	Customer Class	Customer Health Score
Global View	Pie Chart	1. Customers Performance by Health Score Last 12M	X	X			X	X
		2. Customers Performance by Revenue Last 12M	X	X			X	X
	Table	3. Customer Health Summary	X	X	X	X	X	X
		4. Trends	X	X	X (*)	X	X	X
		5. Pricing Opportunity	X	X	X (Ranked by Revenue Below Target descending)		X	X
		6. Selling Opportunity	X	X	X (Ranked by Opportunity descending)		X	X

Legend	7. Customer Summary	X	X			X	X
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Dashboards		Portlets	User Inputs				
			Customer	Time Filter	Category + Value	Product Class	Product Health Score
Customer Details View	Pie Chart	1. Specialty and Commodity Products	X	X	X	X	X
		2. High Volume and Low Volume Products	X	X	X	X	X
	Bar Chart	3. Revenue and Margin chart	X	X	X	X	X
		4. Waterfall chart	X	X	X	X	X
		5. Revenue Breakdown chart	X	X	X	X	X
		6. Number of Transactions in Last 12M & Projection	X		X	X	X
		7. Customer Revenue and Margin Trend in Last 12M & Projection	X		X	X	X
	Legend	8. Customer Summary	X	X	X	X	X

Dashboards	Portlets	User Inputs						
		Customer	Time Filter	Product Attribute	Top/Worst Products	Product Class	Product Health Score	
Customer Products Portfolio	Pie Chart	1. Pricing Opportunity by Product Type	X	X	X		X	X
	Bar Chart	2. Pricing Opportunity by Product Attribute	X	X	X		X	X
		3. Revenue and Margin Contribution	X	X	X		X	X
		4. Pricing Opportunity by Top Products	X	X	X	X	X	X
		5. Pricing Opportunity by Worst Products	X	X	X	X	X	X
		Table	6. Product Health Summary	X	X	X	X (by Health Score)	X
	7. Average Invoice Price		X	X (*)	X	X (by Overall)	X	X
	8. Trends		X	X (*)	X	X (by Health Score)	X	X
	9. Pricing Opportunity		X	X	X	X	X	X
	10. Selling Opportunity		X	X	X	X	X	X

	Legend	11. Customer Summary	X	X			X	X
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(*): Only sorts out Customers/Products that have traded in the period, does not affect calculation results.

3. Classifications

Customer Classification

Based on cumulative contribution to the total volume in the last 12 months.

According to the cumulative volume contribution, the customer is assigned into a category (the thresholds are configurable).

Class	Cumulative volume contribution / threshold
A	<= 20%
B	<= 50%
C	<= 95%
D	rest

Product Classification

Based on cumulative contribution to the total volume in the last 12 months.

According to the cumulative volume contribution, the product is assigned into a category (the thresholds are configurable).

Class	Cumulative volume contribution / threshold
Very High Volume	<= 10%
High Volume	<= 20%
Normal Volume	<= 75%
Low Volume	rest

Commodity vs. Specialty Product

Based on an average margin achieved by the product during the last 12 months (the thresholds are configurable).

Class	Threshold
Commodity	<=40%
Specialty	> 40%

Customer Health Score, Product Health Score

Customers or products are assigned into different classes based on Health Score calculated as a summary of Revenue Health Score and Margin Health Score (with weights set for particular inputs).

The Revenue Health Score and Margin Health Score are set according to the Revenue and Margin monthly change (trend) in the last 12 months (the maximum value is 100, the minimum value is 0) and to this classification:

Revenue or Margin Trend Last 12M	Revenue or Margin Health Score
>25%	100
15% - 25%	75
5% - 15%	60
-5% - 5%	50
-5% - -15%	40
-15% - -25%	25
< -25%	0

Health Score = Revenue Score * Revenue Weight + Margin Score * Margin Weight

The weight value is configurable and can be set between 0 and 1 for each (the default value is 0.5 for each); the summary of these two has to be equal to 1 (e.g. Revenue Weight = 0,5, Margin Weight = 0,5 => 0,5 + 0,5 = 1).

If a customer or product is decreasing in revenue and margin, the Health Score value goes down.

Health Score Classes

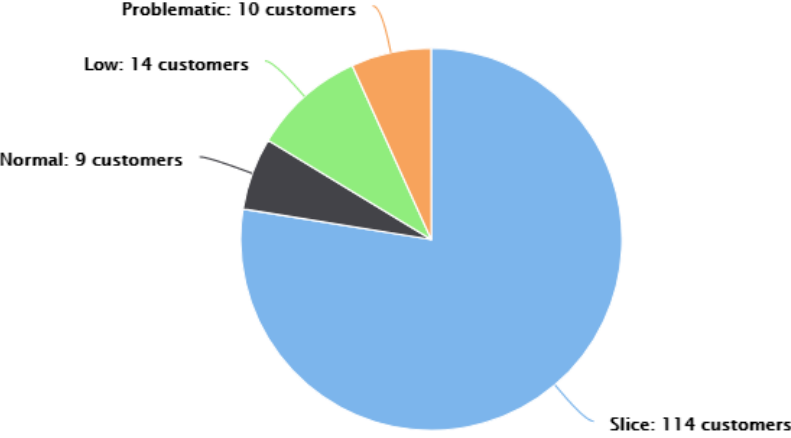
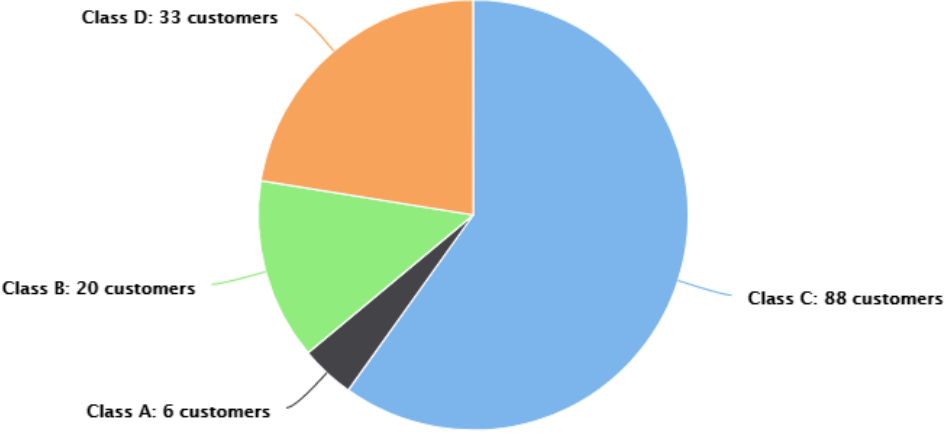
Class	Health Score / threshold
Excellent	> 75
Normal	> 50
Low	> 25
Problematic	rest

Customer Segmentation

To group customers by common characteristics, the Customer Segment is defined in configuration (Price Parameters) - a list of fields the segment consists of, e.g. customer size, region, country etc.

According to values aggregated on the Customer Segment level, certain KPIs for particular customers are calculated, e.g. cross sell.

4. Analysis

Dashboards	Portlets	Description										
Global View	1. Customers Performance by Health Score Last 12M	<p>Shows relative sizes of customer classification based on Health Score in the last 12 months.</p> <p>Customers Performance By Health Score Last 12M</p> <p>From 2020-01-01 To 2020-09-14</p>  <table border="1"> <caption>Customers Performance By Health Score Last 12M</caption> <thead> <tr> <th>Classification</th> <th>Number of Customers</th> </tr> </thead> <tbody> <tr> <td>Slice</td> <td>114</td> </tr> <tr> <td>Normal</td> <td>9</td> </tr> <tr> <td>Low</td> <td>14</td> </tr> <tr> <td>Problematic</td> <td>10</td> </tr> </tbody> </table>	Classification	Number of Customers	Slice	114	Normal	9	Low	14	Problematic	10
	Classification	Number of Customers										
Slice	114											
Normal	9											
Low	14											
Problematic	10											
2. Customers Performance by Revenue Last 12M	<p>Shows relative sizes of customer classification based on Revenue in the last 12 months.</p> <p>Customers Performance By Revenue Last 12M</p> <p>From 2020-01-01 To 2020-09-14</p>  <table border="1"> <caption>Customers Performance By Revenue Last 12M</caption> <thead> <tr> <th>Classification</th> <th>Number of Customers</th> </tr> </thead> <tbody> <tr> <td>Class C</td> <td>88</td> </tr> <tr> <td>Class D</td> <td>33</td> </tr> <tr> <td>Class B</td> <td>20</td> </tr> <tr> <td>Class A</td> <td>6</td> </tr> </tbody> </table>	Classification	Number of Customers	Class C	88	Class D	33	Class B	20	Class A	6	
Classification	Number of Customers											
Class C	88											
Class D	33											
Class B	20											
Class A	6											

3. Customer Health Summary

Shows Customer's Health calculated based on the difference between two periods.
 Ex: Current YTD and Previous YTD.
 It shows correlation between Health Score and revenue, gross margin, volume.

Customer Health Summary

Customer Name	Customer Id	Health Score	Total Revenue	Total Margin	Total Volume	Margin %	Nr. of Transactions per Day
▲ Wacker Stein	CD-00142	▲ +100	16,383	8,909	5,687	54.38%	1
▲ Appetito Mz	CD-00001	▲ +88	470,409	248,126	162,965	52.75%	17
▲ Zumtoschwein ...	CD-00147	▲ +88	16,417	8,789	5,872	53.54%	1
▲ WIGO Fish	CD-00144	▶ +68	15,084	8,076	5,175	53.54%	1
▲ Claudio Pasto	CD-00143	▶ +63	11,845	6,290	4,408	53.10%	1
▼ BioMérieux	CD-00038	▼ 0	161,061	62,093	54,350	38.55%	5
▼ Beruxo	CD-00037	▼ 0	160,932	62,754	53,383	38.99%	5
▼ Dörken Gruppe	CD-00054	▼ 0	160,786	61,550	53,338	38.28%	5
▼ Junui	CD-00056	▼ 0	160,520	61,454	54,396	38.28%	5
▼ Covid Ball	CD-00046	▼ 0	160,198	62,565	53,615	39.05%	5

4. Trends

Trends

Customer Name	Customer Id	Revenue Trend Last 12M	Margin Trend Last 12M	Volume Trend Last 12M	Revenue Trend
▲ Wacker Stein	CD-00142	▼ -22.89%	▼ -4.12%	▼ -20.76%	▲ +
▲ Appetito Mz	CD-00001	▲ +172.10%	▲ +171.61%	▲ +165.92%	▲ +
▲ Zumtoschwein KG	CD-00147	▼ -23.23%	▼ -5.14%	▼ -20.29%	▲ +
▲ WIGO Fish	CD-00144	▼ -23.77%	▼ -6.90%	▼ -23.33%	▲ +
▲ Claudio Pasto	CD-00143	▼ -32.24%	▼ -21.19%	▼ -29.58%	▲ +
▼ BioMérieux	CD-00038	▲ +97.11%	▲ +72.30%	▲ +99.20%	▼ -
▼ Beruxo	CD-00037	▲ +76.15%	▶ +55.79%	▲ +74.42%	▼ -
▼ Dörken Gruppe	CD-00054	▲ +113.64%	▲ +78.84%	▲ +107.72%	▼ -
▼ Junui	CD-00056	▲ +81.41%	▶ +57.83%	▲ +81.18%	▼ -
▼ Covid Ball	CD-00046	▲ +82.80%	▶ +58.59%	▲ +77.48%	▼ -

5. Pricing Opportunity

Shows a list of customers who can be targeted to sell more products and more sales volume. The top of the list represents the highest opportunity, these customers are under the median point in the customers set. The bottom of the list represents the lowest opportunity. (hidden)

Pricing Opportunity				
Customer Name	Customer Id	Revenue Below Target	% Revenue Below Target	% Product Buying
New York Meat	CD-00008	27,754	4.90%	100.00%
Price f(x) AG	CD-00004	22,643	5.59%	100.00%
E. Fuller	CD-00009	22,295	4.00%	100.00%
Grays Ho	CD-00010	22,197	5.34%	100.00%
M. Müller	CD-00003	21,185	3.60%	100.00%

- Revenue below target (Evaluate purchased products)
 - + If the value > 0, customers have reached the revenue under the median point among the customers set, it indicates the value that customer should obtain to reach the median base.
 - + If the value = 0, customers have reached the revenue above the median point among the customers set, they are good customers.
- % Product Buying - Shows how many products (in %) the customer purchased in the given period.
 - + If the value = 100%, the customer purchased full products set presented in the given period. It correlates with Cross Sell Opportunity = 0.
 - + If the value < 100%, the customer did not purchase the full products set presented in the given period. It means this customer must have Cross Sell Opportunity > 0.

6. Selling Opportunity

Shows the total value which can be gained for products that the customer already bought and not bought in the given period.

- Cross Sell (Evaluate non-purchased products)
 - + The value that the customer should spend by purchasing a product which they did not buy in the past, but other customers bought it.
 - + If the value = 0, the customer bought full products set presented in the given period.
- Up Sell (Evaluate purchased products)
 - + The value that the customer should spend more by purchasing a product which they already bought in the past.
 - + If the value = 0, the customer purchased products that all are above median point in the customers set.
- Opportunity: This is the total additional value that can be obtained for the customer, evaluate for both purchased and non purchased products.

Selling Opportunity				
Customer Name	Customer Id	Cross Sell	Up Sell	Opportunity
Lindo Healthball	CD-00085	20,811	373,249	394,060
Zumtoschwein KG	CD-00147	101,990	199,422	301,412
Schweizer Group	CD-00117	83,194	147,951	231,145
Texas Meat	CD-00133	76,681	130,842	207,523
Stomach	CD-00129	74,389	129,193	203,582

7. Customer Summary

- Displays some typical figures regarding a chosen customer or a group of customers.
- Customer displays a list of [Customer ID,(Customer Name)] following a filter group. When no customer is selected, it is left empty.
- Health Score Last 12M is re-calculated by the Trend L12M of the group.
- Pricing Opportunity = \sum Revenue below target
- Selling Opportunity = \sum Up Sell + \sum Cross Sell
- Note: Data queried from **Datamart**

SELECT DASHBOARD

Customer Insights Global View

DATA FILTER

Customer(s) Customer Type: Industry

* Time Filter L12M

* Top/Worst Custome... 5

* KPI Health Score

Customer Class

Customer Health Score

Customer Summary

Customers: CD-00003 (M. Müller), CD-00004 (Price f(x) AG), CD-00012 (Soupo DE), CD-00014 (Kraftmeat), CD-00018 (Soupo CH), CD-00019 (Francomeat), CD-00020 (US Steak), CD-00022 (Saftmeat), CD-00024 (Xing-Wop), ...

Health Score Last 12M: ▶ +55

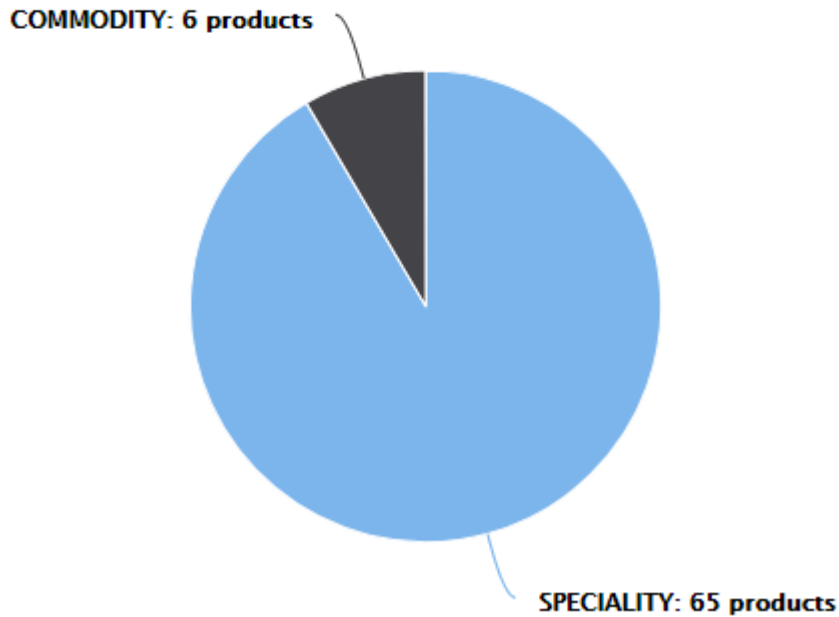
Revenue Trend YTD: ▼ -100.00%	Total Revenue: 140,297,611	Pricing Opportunity: 10,896,565
Margin Trend YTD: ▼ -100.00%	Total Margin: 7,039,809	Selling Opportunity: 7,970,628
Volume Trend YTD: ▼ -100.00%	Total Volume: 5,655,068	Opportunity: 18,867,193

1. Specialty and Commodity Products

Shows relative sizes of product classification based on the margin %.
 Specialty Products: Higher than the defined margin %
 Commodity Products: Lower than the defined margin %

Speciality vs Commodity Products

From 2020-01-01 To 2020-07-06

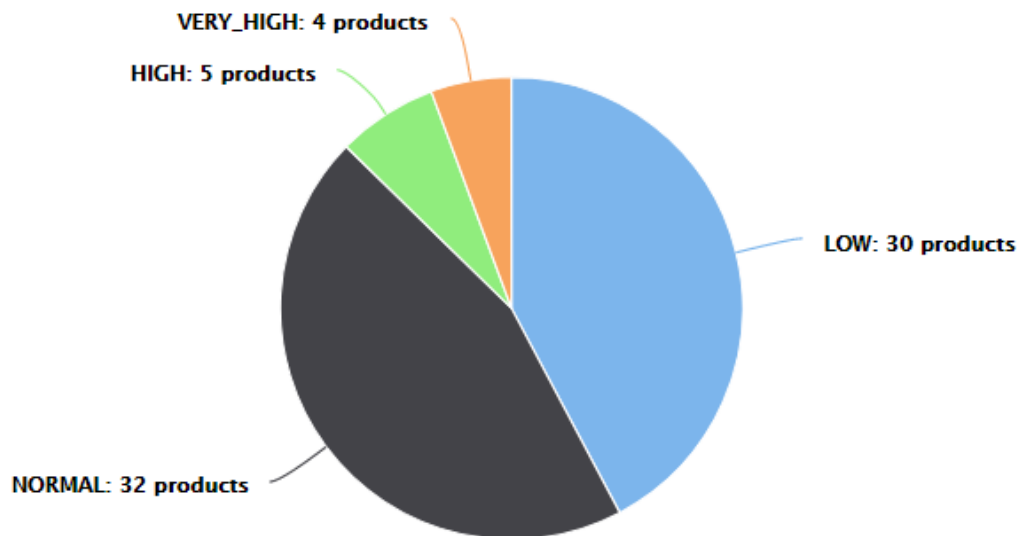


2. High Volume and Low Volume Products

Shows relative sizes of product classification based on volume.

High Volume vs Low Volume Products

From 2020-01-01 To 2020-08-25



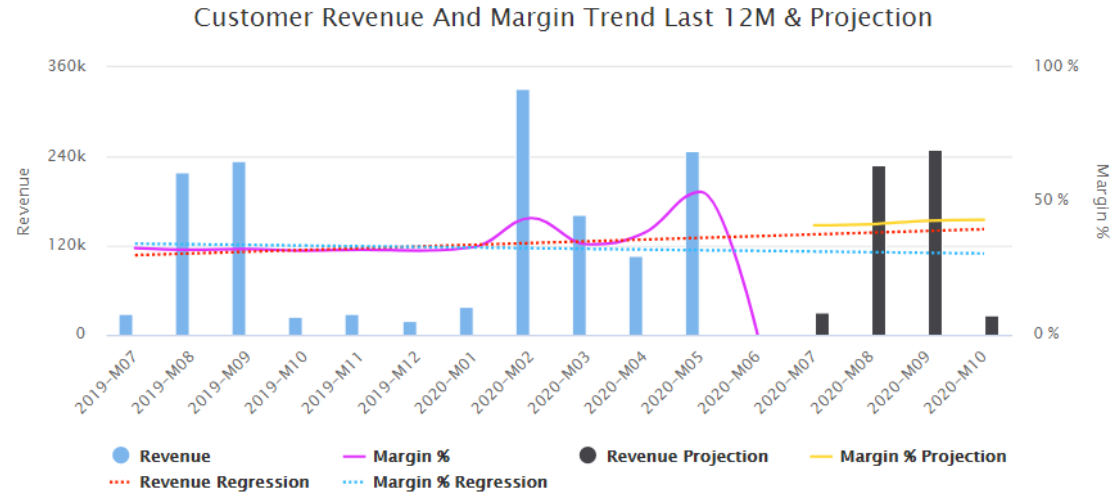
6. Number of Transactions in Last 12M & Projection

Bar & line chart shows the number of transactions for the last 12 months and estimation for the next 3 months. The current month is considered as a future month (as it has not ended yet).



7. Customer Revenue and Margin Trend in Last 12M & Projection

Bar & line chart shows Revenue and Margin for the last 12 months and estimation for the next 3 months. The current month is considered as a future month (as it has not ended yet).



8. Customer Summary

- Displays some typical figures regarding the chosen customer.
- All values are aggregated on the Customer(s) and Category levels.
- If a Category value is not selected, it will be hidden in the portlet.
- On click "View Customer Products Portfolio" to open new tab "Customer Products Portfolio" dashboard.
- Note: Data queried from **Datamart**

SELECT DASHBOARD

Customer Insights Customer Detail View

DATA FILTER

Customer: CD-00002

* Time Filter: L6M

Category:

Value:

Product Class:

Product Health Score:

Customer Summary

Customer: CD-00002 (Spagetti M)

Segment: Europe-Italy

Health Score Last 12M: ▲+100

Revenue Trend YTD: ▼0.00%	Revenue Trend (last 12M): ▲+74.21%	Total Revenue: 183,234
Margin Trend YTD: ▼0.00%	Margin Trend (last 12M): ▲+114.69%	Total Margin: 81,712
Volume Trend YTD: ▼0.00%	Volume Trend (last 12M): ▲+75.54%	Total Volume: 63,459

View Customer Products Portfolio

Customer Products Portfolio

1. Pricing Opportunity by Product Type

Shows relative sizes of product classification based on the margin %.

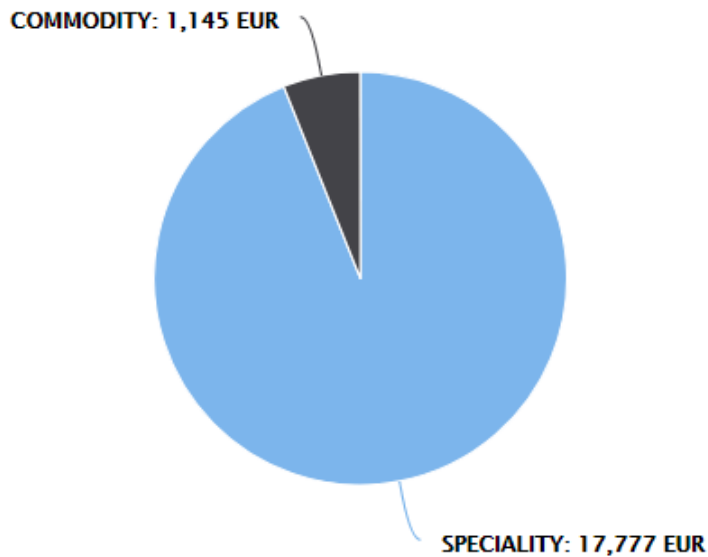
Specialty Products: Higher than the defined margin %

Commodity Products: Lower than the defined margin %

Pricing Opportunity By Product Type Chart

Pricing Opportunity By Product Type

From 2020-01-01 To 2020-08-25



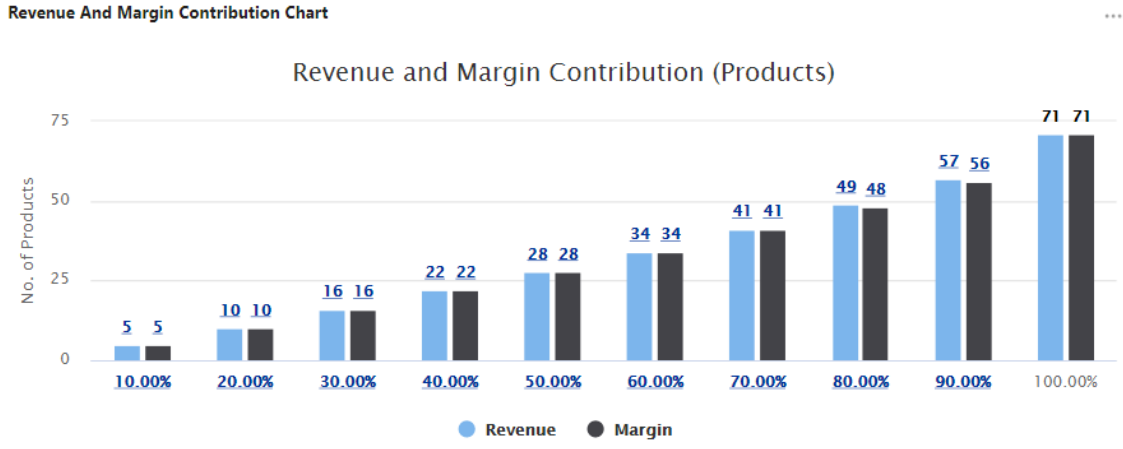
2. Pricing Opportunity by Product Attribute

Sum Revenue below target by the input value in the product attribute filter. The chart label reflects the input value in the product attribute filter.



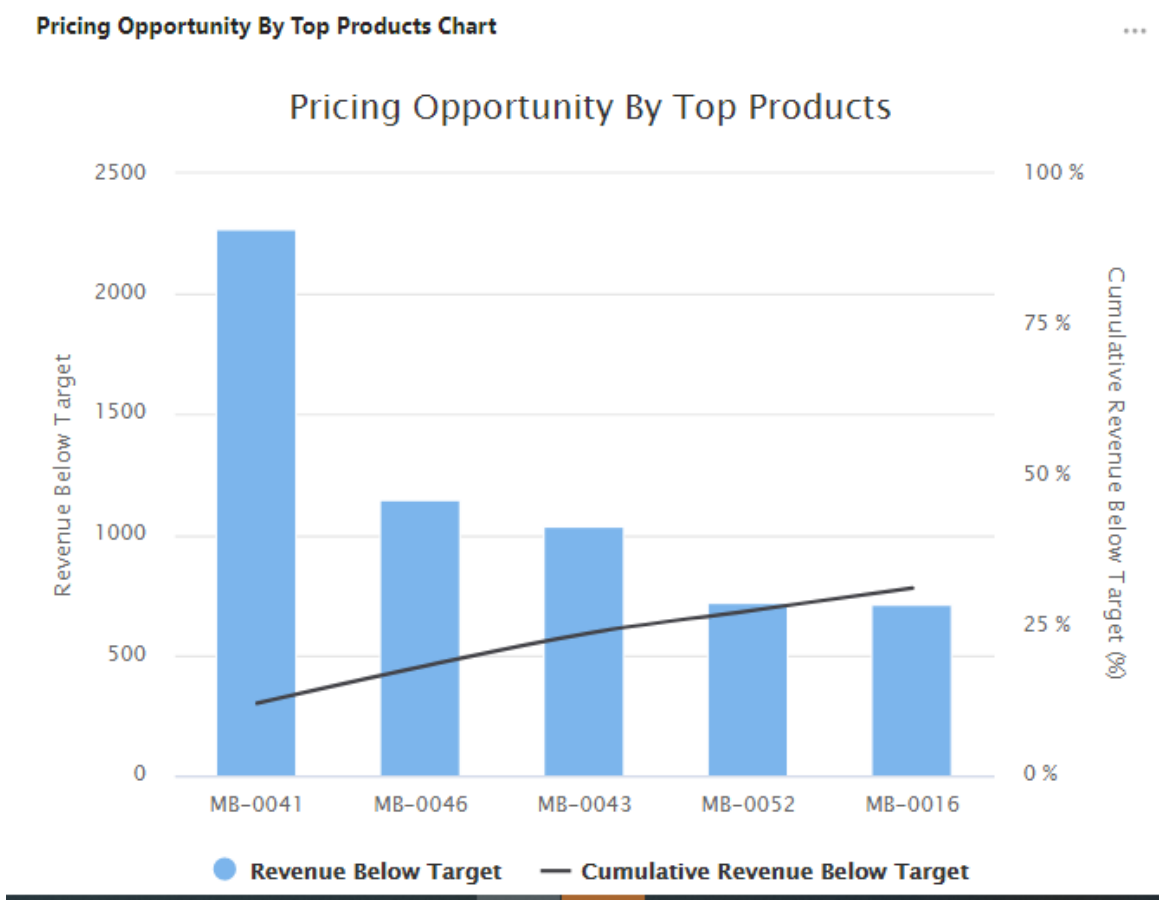
3. Revenue and Margin Contribution

Shows Revenue and Margin split into ten buckets to visualize the number of products needed to cover each bucket (cumulative contribution).



4. Pricing Opportunity by Top Products

Shows products (bars) by Revenue below target descending and cumulative Revenue below target (line). They are grouped by product ID.



5. Pricing Opportunity by Worst Products

Hidden

6. Product Health Summary

Show Revenue and margin for top/worst Products

Product Health Summary ...

Product Name	Product Id	Total Revenue	Total Margin	Total Volume	Margin %	Health Score
▲ NyChem 90	NC-0090	2,880	934	982	32.42%	▲ +100
▲ NyChem 100	NC-0100	2,690	853	905	31.70%	▲ +100
▲ Mustard hot	MB-0047	10,691	4,998	3,631	46.75%	▶ +50
▲ Sausage BS	MB-0028	15,657	6,920	5,206	44.20%	▶ +50
▲ Meatball BS...	MB-0048	9,660	4,243	3,330	43.93%	▶ +50
▼ Sparkling ...	BV-0007	12,238	5,792	4,277	47.33%	▼ 0
▼ Tomato mild	MB-0042	9,905	4,470	3,272	45.13%	▼ 0
▼ Multivitami...	BV-0010	10,397	4,872	3,560	46.86%	▼ 0
▼ MaiTai	BV-0004	12,380	5,782	4,470	46.70%	▼ 0
▼ Orange Juice	BV-0008	11,880	5,685	4,018	47.85%	▼ 0

7. Average Invoice Price

Shows Average Unit Price per Product ID and Customer Classification by Revenue.

- Customer Revenue Class A/B/C/D: Average invoice price per Product and Customer classification.

- Overall: Average invoice price per Product and all customers

- Customer: Average invoice price per Product and customer.

Average invoice price calculated based on data in the last 12 months. Time filter has no effect in this table.

Average Invoice Price Table ...

Product Name	Product Id	Customer Revenue Class A	Customer Revenue Class B	Customer Revenue Class C	Customer Revenue Class D	Overall	Customer
▲ Bundle	MB-0060	3.07	3.08	3.07		3.10	3.11
▲ Config...	MB-0052	3.03	2.99	3.08		3.08	2.89
▲ Meal S	Meal-CO...	3.07	3.02	3.04		3.07	3.03
▲ Meatb...	MB-0022	2.99	3.02	3.06	3.12	3.06	3.10
▲ Meal M	Meal-CO...	3.06	3.05	3.05		3.06	2.89
▼ Still W...	BV-0006	2.98	2.91	2.94	2.93	2.94	2.99
▼ Multivi...	BV-0010	2.98	2.89	2.99	2.84	2.93	2.87
▼ Sparkli...	BV-0007	2.97	3.00	2.94	2.88	2.93	2.91
▼ Mojito	BV-0005	2.91	2.90	2.94	2.94	2.93	3.08
▼ Meatb...	MB-0001	2.83	2.94	2.93	2.89	2.92	2.74

8. Trends

Show trend values for top/worst Products (ranked by Health Score)

Trends

Product Name	Product id	Revenue Trend...	Margin Trend Last 12M	Volume Trend Last 12M	Revenue Trend YTD	Margin Trend YTD	Volume Trend YTD
▲ NyChe...	NC-0090	▲ +143.20%	▲ +123.12%	▲ +166.30%	▲ +206.67%	▲ +244.05%	▲ +193.13%
▲ NyChe...	NC-0100	▼ -12.49%	▼ -13.12%	▼ -12.45%	▲ +250.72%	▲ +294.62%	▲ +295.20%
▲ Mustar...	MB-0047	▲ +333.67%	▲ +504.89%	▲ +360.53%	▲ +167.49%	▲ +291.13%	▲ +139.67%
▲ Sausage...	MB-0028	▷ +48.85%	▲ +73.69%	▷ +54.04%	▲ +122.82%	▲ +203.32%	▲ +124.30%
▲ Meatbal...	MB-0048	▲ +127.86%	▲ +234.04%	▲ +93.28%	▲ +166.09%	▲ +243.36%	▲ +184.86%
▼ Sparklin...	BV-0007	▼ -6.16%	▼ +16.32%	▼ +.82%	▼ -36.39%	▼ -22.36%	▼ -32.22%
▼ Tomato ...	MB-0042	▲ +140.16%	▲ +237.45%	▲ +151.49%	▲ +138.16%	▲ +219.63%	▲ +117.41%
▼ Multivit...	BV-0010	▲ +316.13%	▲ +534.13%	▲ +259.88%	▼ -46.74%	▼ -33.91%	▼ -45.10%
▼ MaiTai	BV-0004	▼ +5.26%	▼ +21.75%	▼ +5.27%	▼ -41.19%	▼ -27.95%	▼ -35.97%
▼ Orange ...	BV-0008	▲ +104.46%	▲ +124.51%	▲ +77.62%	▼ -41.93%	▼ -27.44%	▼ -43.30%

9 Pricing Opportunity

Shows Revenue below target value and % Revenue below target. They are grouped by the input value in the product attribute filter.

Customer Insights Customer Products Portfolio

DATA FILTER

Customer: CD-00001

* Product Attribute: Product Group

* Time Filter: L6M

* Top/Worst Products: 5

Product Class: []

Product Health Score: []

Pricing Opportunity

Product Group	Revenue Below Target	% Revenue Below Target
Meatball	1,809.64	7.56%
Sausage	524.96	7.58%
Alcoholic	461.26	9.02%
Non-Alco...	434.52	13.14%
Toppings	183.01	6.89%

5 rows

10 . Selling Opportunity

Shows the total value which can be gained for products that the customer already bought and not bought in the given period. They are grouped by the input value in the product attribute filter.

Customer Insights Customer Products Portfolio

DATA FILTER

Customer: CD-00001

* Product Attribute: Product Group

* Time Filter: L6M

* Top/Worst Products: 5

Product Class: []

Product Health Score: []

Selling Opportunity

Product Group	Cross Sell	Revenue Increase	Opportunity
Meals	2,574.38	0.00	2,574.38
Sausage	374.96	0.00	374.96
Meatball	0.00	0.00	0.00
Alcoholic	0.00	0.00	0.00
Non-Alcoholic	0.00	0.00	0.00

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Displaying some typical figures regarding the chosen customer, showing segment that the customer belongs to.

- Note: Data queried from **Simulation**

Customer Summary ...

Customers: **CD-00006 (Soupo AG)**

Segment: America-USA

Health Score Last 12M: **▲+100**

Revenue Trend YTD: **▼+26.64%** Total Revenue: **1,215,018** Pricing Opportunity: **16,713**

Margin Trend YTD: **▲+62.57%** Total Margin: **526,549** Selling Opportunity: **0**

Volume Trend YTD: **▷+30.32%** Total Volume: **411,539** Opportunity: **16,713**

5. Analysis Example

Will be added later.

6. References

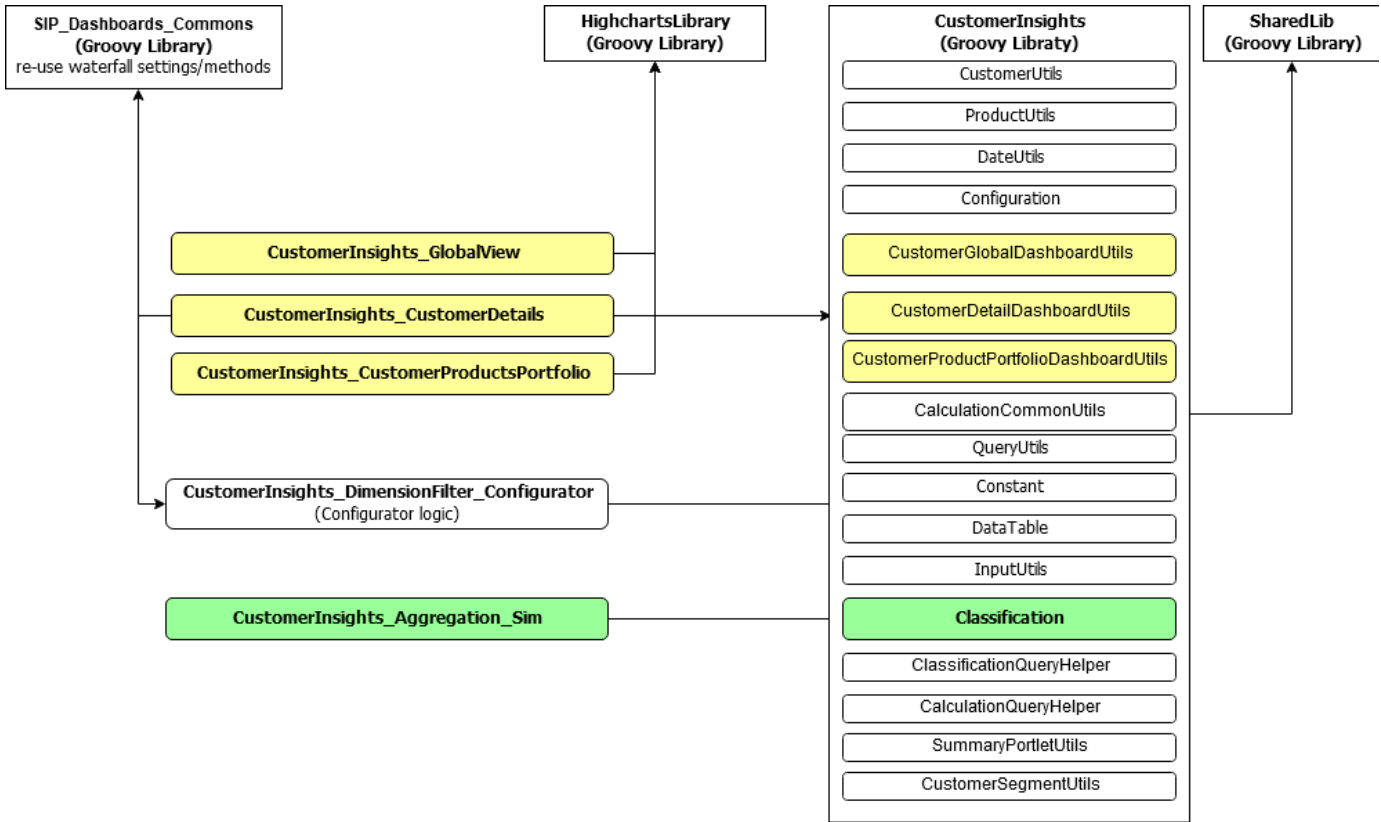
Original design: [Customer Insights](#)

Calculations and formulas: <https://pricefx.atlassian.net/wiki/spaces/ACCDEV/pages/1903658910/Glossary#Customer-Insights>

Deployment: [Customer Insights Dashboard Deployment](#)

How to configure: [Customer Insights Dashboard Configuration](#)

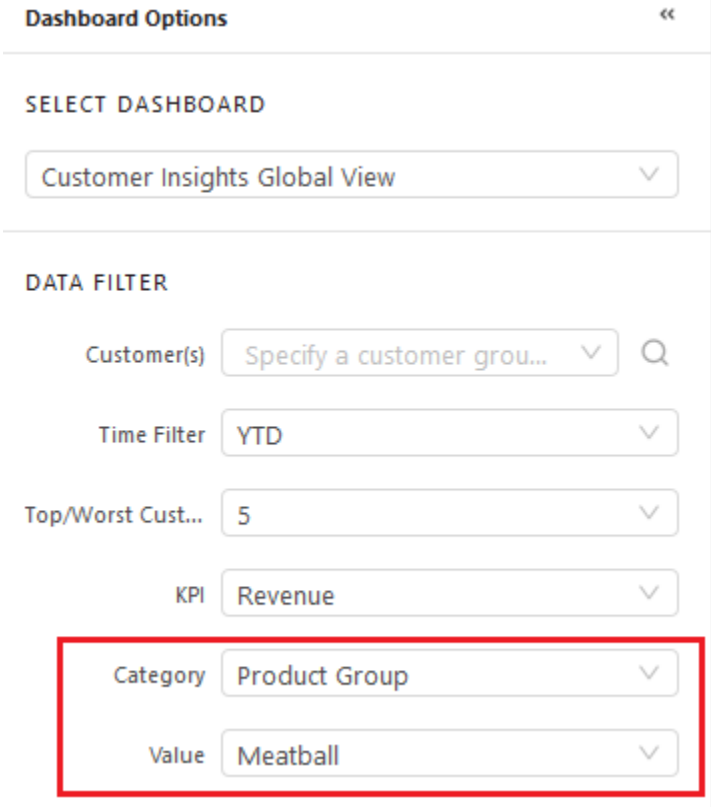
Customer Insights Dashboard Technical Overview



There are some main Groovy logics in this architecture:

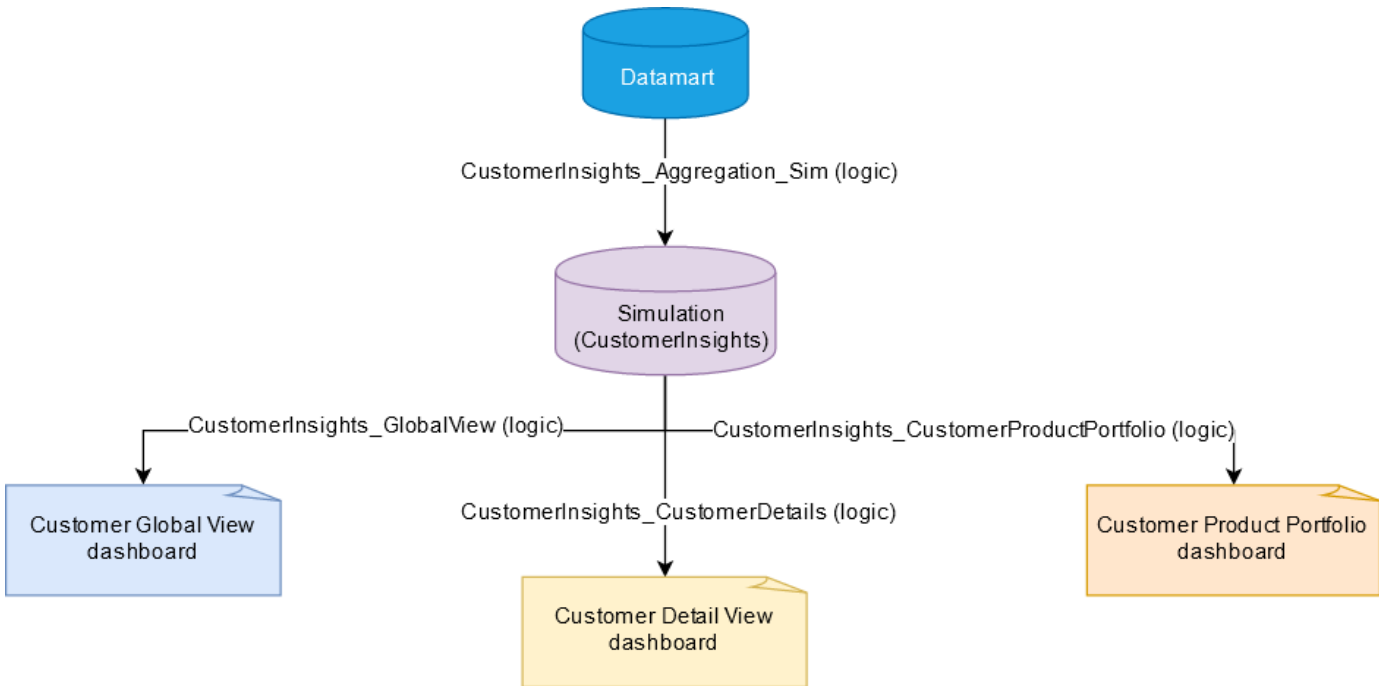
CustomerInsights (Groovy library)		The main library is used in the Customer Insights Dashboard logic. It provides functions to query and process data.
	CustomerUtils	Provides functions related to Customer such as: getAllCustomerIdsWithOtherAttributes, groupByCustomerAttributes
	ProductUtils	Provides functions related to Products such as: getProductAttributes, getSourceFieldsFromProductDataSource
	DateUtils	Provides functions related to dates.
	Configuration	Reads configured data from a price parameter and advanced configuration options
	CustomerGlobalDashboardUtils	Provides logics to process data to be shown in CustomerInsights_GlobalView dashboards.
	CustomerDetailDashboardUtils	Provides logics to process data to be shown in CustomerInsights_CustomerDetails dashboards.

CustomerProductPortfolioDashboardUtils	Provides logics to process data to be shown in CustomerInsights_CustomerProductsPortfoliodashboards.
CalculationCommonUtils	Provides some common/calculation functions
QueryUtils	Provides functions to query data from the Datamart / Data Source
Constant	Defines constants used in the Customer Insights Dashboard
DataTable	Provides functions to build the row format of the result matrix to be displayed in the dashboard
InputUtils	Provides functions to build input controls such as: Time Filter, Category /Value...
Classification	Provides logics to pre-process data such as: calculate Customer Health Score, Trends... Used in Simulation logic (CustomerInsights_Aggregation_Sim)
ClassificationQueryHelper	Provides functions to build a Query object to summarize data from Datamart / Data Source to use in Classification.
CalculationQueryHelper	Provides functions to build a Query object to summarize data from Datamart / Data Source to use in Calculation.
SummaryPortletUtils	Provides functions to create a summary data table (Summary portlet) in dashboards.
CustomerSegmentUtils	Provides functions to query and build segment data from sources
SharedLib	Groovy library to provide common functions
HighchartsLibrary	Groovy library to provide functions to build highcharts shown on the dashboard Use version 1.1.2 and higher. Accelerate Dashboards Library
SIP_Dashboards_Commons	Groovy library of SIP, it re-uses some methods to build a waterfall chart in a dashboard.

CustomerInsights_DimensionFilter_Configurator	<p>Configurator logic to build the Category/Value input in dashboards</p> 
CustomerInsights_GlobalView	Customer Global View dashboard logic
CustomerInsights_CustomerDetails	Customer Detail View dashboard logic
CustomerInsights_CustomerProductPortfolio	Customer Product Portfolio dashboard logic
CustomerInsights_Aggregation_Sim	Simulation logic

Note: Almost all dashboard logics use SQL to have a better performance in case there are large data sets.

DataFlow



In Customer Insights Accelerator, we used Simulation to aggregate data from a Datamart by customer, product and pricing month. It helps improve the dashboard performance because:

- The system queries data in a smaller data set.
- Some data need to be pre-processed before showing on dashboards as trend values, product and customer classification etc.

Note: There are some charts and portlets whose data are queried from Datamart directly, not from Simulation, such as:

- Customer Global View Dashboard: Customer Summary portlet
- Customer Detail View: Customer Summary Portlet, Waterfall chart

Customer Insights Dashboard Deployment

Customer Insights Dashboard (CID) is an extension of Sales Insights Package (SIP) - CID re-uses some SIP components.

i For the correct functionality, both SIP 1.6 and CID 1.4.3 (or later versions) have to be present at the partition.

In this section:

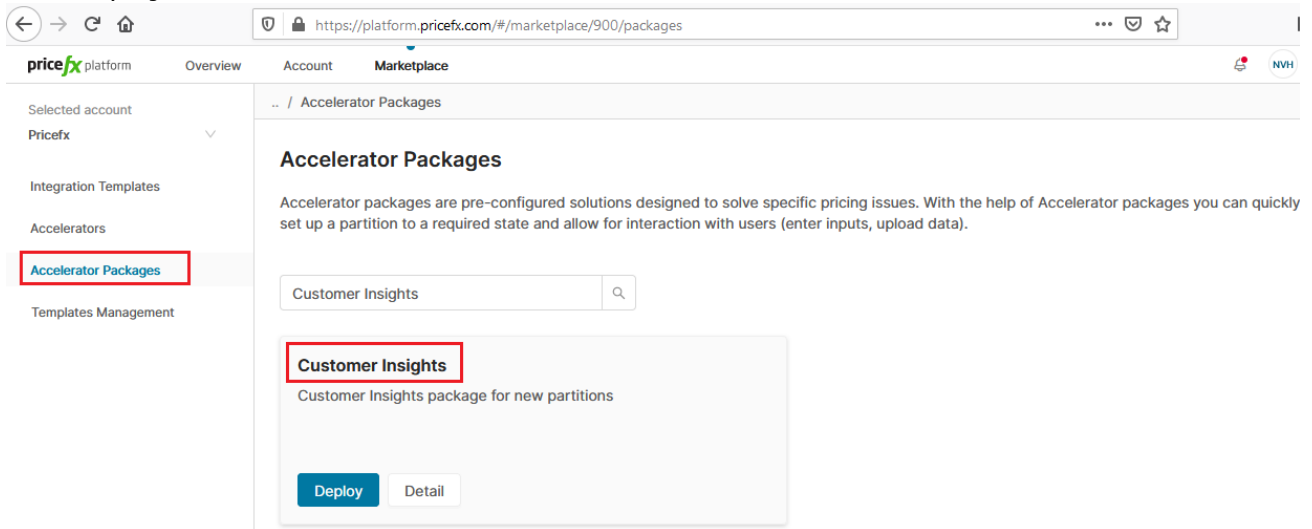
- [A. Run Deployment from PlatformManager](#)
- [B. Update Price Parameters and Advanced Configuration Options](#)
- [C. Run Simulation \(Manual Step\)](#)

As the current version of PlatformManager does not support all of the steps needed to deploy the Customer Insights Dashboard, the step [Run Simulation \(Manual Step\)](#) needs to be performed manually.

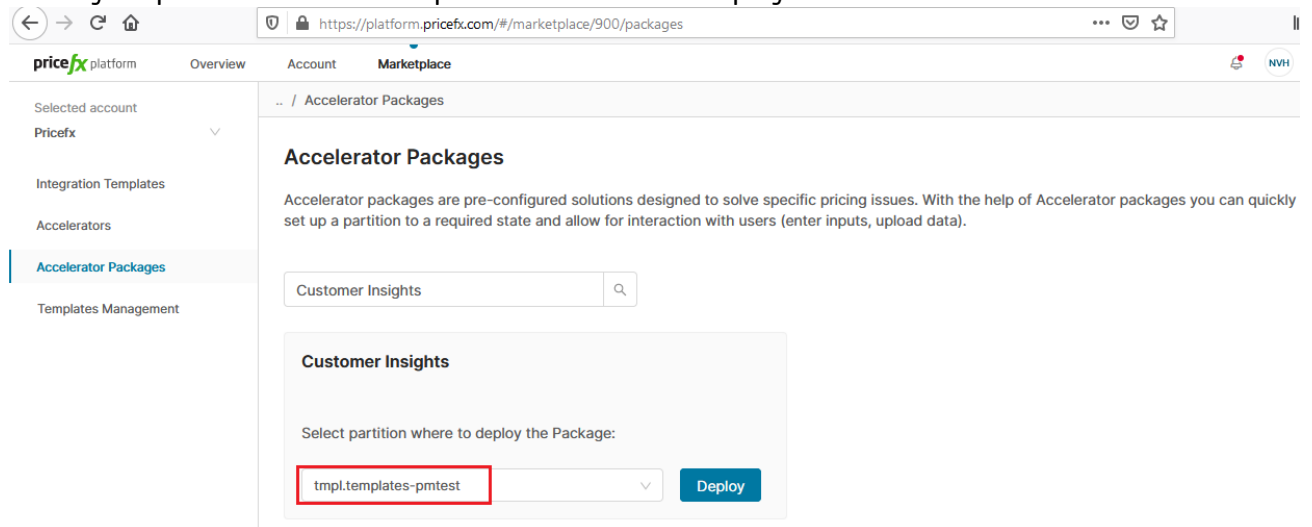
Before running deployment to a partition where Customer Insights Package had been installed before, it is recommended to delete the previously created Simulation (PriceAnalyzer > Simulation: CustomerInsights) and Price Parameters (Price Parameters > CustomerInsights: all). This step can be skipped if it is obvious that no changes were done to these objects (Simulation, Price Parameters structure) since the previous version (see the [Customer Insights Dashboard Release Notes](#)).

A. Run Deployment from PlatformManager

1. Access PlatformManager at <https://platform.pricefx.com/> and log in with your account or using 0365.
2. Go to Marketplace > Accelerator Packages.
3. Find Customer Insights Package.
4. Click 'Deploy'.



5. Select your partition from the dropdown list and click 'Deploy'.



6. Set up Datamart mapping.

pricefx platform Overview Account Marketplace Product Requests NVH Nhat Vinh Ho

Selected account Pricefx

Integration Templates

Accelerators

Accelerator Packages

Templates Management

Deployed Templates

Failed Deployments

.. / Accelerator Packages / tmpl.templates-platform / Customer Insights

Datamart Mapping Setup Simulation

Settings

Original Source Type
Datamart

Datamart Name
Standard_Sales_Data

Datamart CustomerID Field Name
Customer Id

Datamart Customer Name Field Name
Customer Id

Datamart ProductID Field Name
Product Id

Datamart Product Name Field Name
Product Name

Datamart Pricing Date Field Name
Pricing Date

Datamart Invoice Price Field Name
Invoice Price

Datamart Margin Field Name
Gross Margin

Datamart Quantity Field Name
Quantity

Source Type
DMSIM

Source Name
DMSIM.CustomerInsights

Continue Cancel

Keep the default text in the 'Simulation' section and select the 'Continue' button

Wait for system import.

pricefx platform Overview Account Marketplace NVH

Selected account Pricefx

Integration Templates

Accelerators

Accelerator Packages

Templates Management

.. / Accelerator Packages / tmpl.templates-pmtest / Customer Insights

Datamart Mapping Setup Simulation

Importing...

This setup can take up to 30 minutes.

If you would like to be notified by email when the data upload is complete, use the toggle button. You may then exit the browser.

Synchronizing data of the product master table with the product data source

30%

7. Set up Simulation

To set up a simulation, you need to select a Datamart (source of simulation) and fields which will be used in the simulation. There is also an option to limit the input data for the Simulation in the Filters section by specifying the Source Field and Value, then only the data equal to or bigger than this value will be loaded. When done, click "Continue".

pricefx platform Overview Account Marketplace Product Requests NVH Nhat Vinh Ho

Selected account Pricefx

Integration Templates Accelerators Accelerator Packages Templates Management Deployed Templates Failed Deployments

.. / Accelerator Packages / tmpl.templates-platform / Customer Insights

Datamart Mapping Setup Simulation

Setup Simulation

Map the Datamart fields which will be used in Simulation.

Sources
[DM] Standard Sales Data

Group By

Source Field	Expected Source Field	Label
CustomerId	CustomerId	Customer Id
CustomerName	CustomerName	Customer Name
PricingDateMonth	PricingDateMonth	Pricing Date Month
PricingDateQuarter	PricingDateQuarter	Pricing Date Quarter
PricingDateYear	PricingDateYear	Pricing Date Year
ProductId	ProductId	Product Id
ProductName	ProductName	Product Name

Add field

Measures

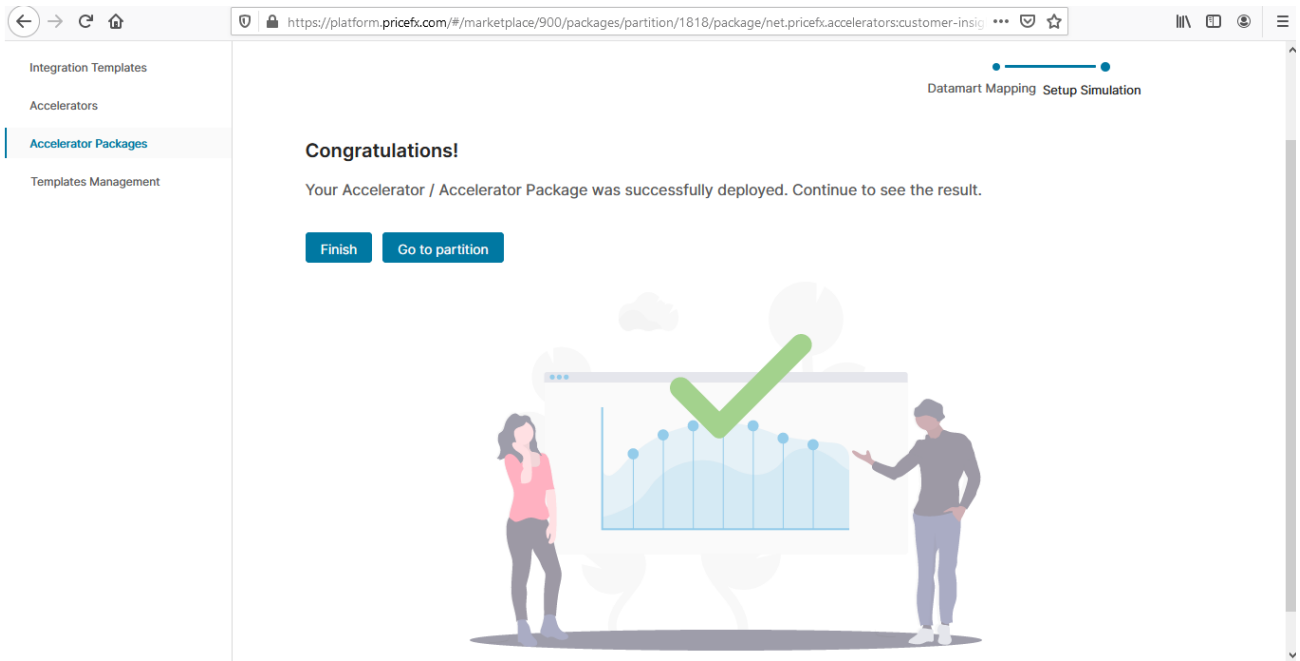
Source Field	Expected Source Field	Label
Quantity	p1_Quantity	Quantity
InvoicePrice	p2_InvoicePrice	Invoice Price
GrossMargin	p3_GrossMargin	Gross Margin
UniqueId	p4_UniqueId	Unique Id

Filters

Source Field	Operator	Value
PricingDateYear	greater than or equal to	2019

Continue Cancel

The deployment is complete.



B. Update Price Parameters and Advanced Configuration Options

1. The *PFXTemplate_CustomerInsights_Customer_Segment* PP needs to be consistent with the partition data for the fields set as Active. This PP defines the fields used for a customer segmentation.
2. If the partition has some special setting (different from the Accelerator default setting), check and update the settings in other Price Parameters.

For more details see: [Customer Insights Dashboard Configuration](#).

C. Run Simulation (Manual Step)

To keep the Simulation data synchronized with Datamart, a scheduled job needs to be set to run the Simulation logic.

This can be done in Data Loads by taking these steps:

1. Go to PriceAnalyzer Data Manager Data Loads.
2. Find a Data Load with Target = "CustomerInsights" and Type = "Simulation".

CustomerInsights				Simulation			
Target	Source	Label	Type	Status	Start Date	End Date	
DMSIM.CustomerInsights		Customer Insights	Simulation	Ready	08/17/2020 10:08 PM	08/17/2020 10:29 PM	

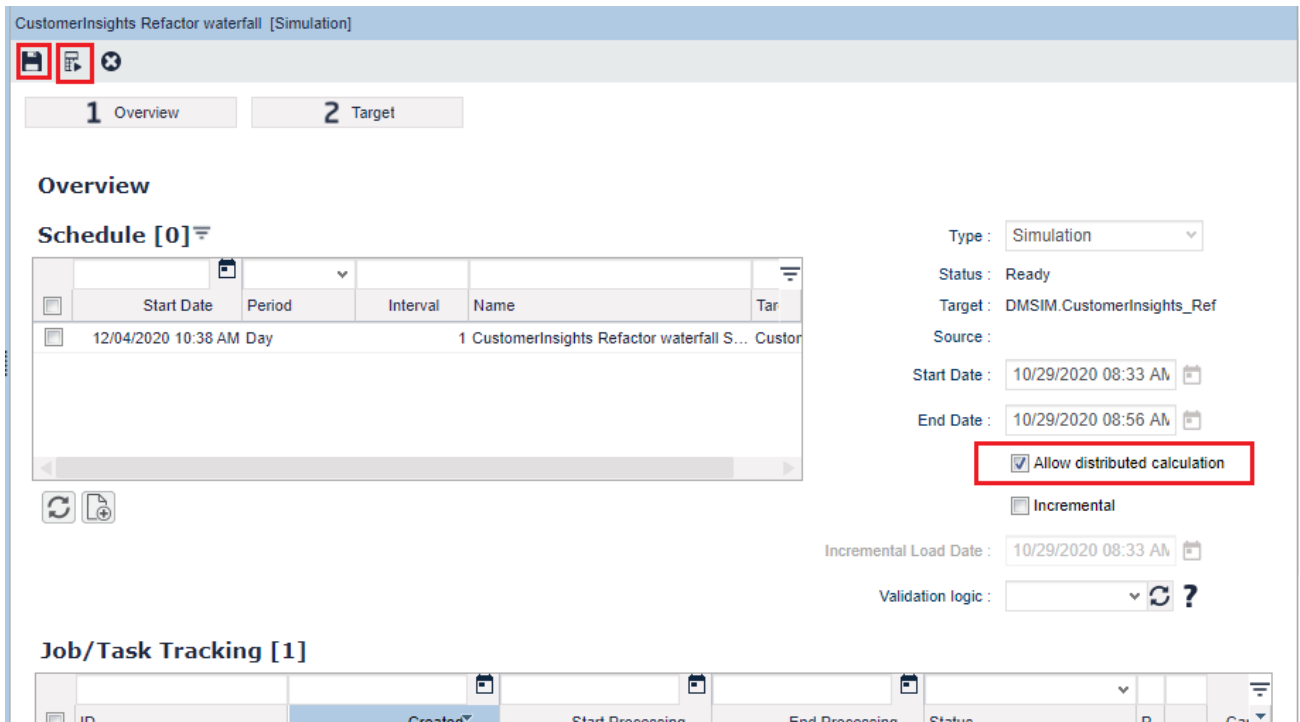
3. Select the "CustomerInsights" Data Load and click the "Add" button.

The screenshot shows the 'Data Loads' section on the left with a table containing two entries: 'Target' and 'DMSIM.CustomerInsights'. The right pane shows the 'Customer Insights (Simulation)' configuration. Under 'Schedule [0]', there is an empty table with columns 'Start Date', 'Period', 'Interval', and 'Name'. Below this table, a red box highlights a save icon. The 'Job/Task Tracking [6]' table shows two rows of completed jobs with columns for ID, Created, Start Processing, End Processing, and Status.

4. Select "Period" and "Interval" for this schedule. The simulation can run daily, weekly, monthly.

This screenshot shows the same interface as above, but the 'Schedule [1]' table now contains one entry: '08/25/2020 10:16 AM', 'Day', '1', 'Customer Insights Simulation'. A red box highlights the 'Day' and '1' values. The 'Allow distributed calculation' checkbox is now checked. The 'Job/Task Tracking [6]' table shows the same two completed jobs.

5. Enable the "Allow distributed calculation" option, click "Save" and then select "Run". - The distributed mode is temporarily not working properly. Wait for a fix; until then don't use this mode.



Customer Insights Dashboard Configuration

- [User Roles](#)
- [I. Price Parameters](#)
 - [1. PFXTemplate_CustomerInsights_Configuration](#)
 - [2. PFXTemplate_CustomerInsights_Customer_Segment](#)
 - [3. CurrencySymbols](#)
- [II. Advanced Configuration Options](#)
- [III. Waterfall Chart Configuration](#)

User Roles

To use Customer Insights Dashboard, you need to be assigned the following Pricefx user roles:

- Manage Price Lists (in the PriceBuilder section)
- View Price Parameters (in the PriceBuilder section)
- Manage PA Simulations (in Analytics section)

I. Price Parameters

Customer Insights Dashboard (CID) works based on configuration data which users can adjust to match their business case.

The configuration data are stored in these pricing parameter tables:

- PFXTemplate_CustomerInsights_Configuration
- PFXTemplate_CustomerInsights_Customer_Segment

1. PFXTemplate_CustomerInsights_Configuration

Most parameters used in CID are saved in this table, including 5 main columns:

1	Category	Category of the configuration
2	Key Name	Key name of the configuration
3	Value	Defines the value corresponding to the key-set
4	Is Default	If set to Yes, the dashboard will use the value of this item as a default value
5	Order	Order of items in the same Category
6	Key Label	Label will be shown on the chart/input
7	Note	Which logic type is used

<input type="checkbox"/>	Category	Key Name	Value	IsDefault	Order	Key Label	Note
<input type="checkbox"/>	MASTER_DATA	TIME_FILTER	MTD		1		Dashboard logic
<input type="checkbox"/>	MASTER_DATA	TIME_FILTER	QTD		2		Dashboard logic
<input type="checkbox"/>	MASTER_DATA	TIME_FILTER	YTD	YES	3		Dashboard logic
<input type="checkbox"/>	MASTER_DATA	TOP_WORST_CUSTOMERS	10		2		Dashboard logic
<input type="checkbox"/>	MASTER_DATA	TOP_WORST_CUSTOMERS	50		4		Dashboard logic
<input type="checkbox"/>	MASTER_DATA	TOP_WORST_CUSTOMERS	100		5		Dashboard logic
<input type="checkbox"/>	MASTER_DATA	TOP_WORST_PRODUCTS	10		2		Dashboard logic
<input type="checkbox"/>	MASTER_DATA	TOP_WORST_PRODUCTS	50		4		Dashboard logic
<input type="checkbox"/>	MASTER_DATA	TOP_WORST_PRODUCTS	100		5		Dashboard logic
<input type="checkbox"/>	CUSTOMER_CLASSIFICATION_HEALTH	EXCELLENT	75		1	Excellent	Simulation logic
<input type="checkbox"/>	CUSTOMER_CLASSIFICATION_HEALTH	GOOD	50		2	Good	Simulation logic
<input type="checkbox"/>	CUSTOMER_CLASSIFICATION_HEALTH	NORMAL	25		3	Normal	Simulation logic
<input type="checkbox"/>	CUSTOMER_CLASSIFICATION_HEALTH	PROBLEMATIC	0		4	Problematic	Simulation logic

1.1 Dashboard Configuration

a. Time Filter Selector Input

Time Filter :

- MTD
- QTD
- YTD
- L3M
- L6M
- L12M

Data for this selector are defined in Category = "MASTER_DATA" and Key Name = "TIME_FILTER".

<input type="checkbox"/>	Category	Key Name	Value	IsDefault	Order	Key Label
<input type="checkbox"/>	MASTER_DATA	TIME_FILTER	MTD		1	MTD
<input type="checkbox"/>	MASTER_DATA	TIME_FILTER	QTD		2	QTD
<input type="checkbox"/>	MASTER_DATA	TIME_FILTER	YTD	YES	3	YTD
<input type="checkbox"/>	MASTER_DATA	TIME_FILTER	L3M		4	L3M
<input type="checkbox"/>	MASTER_DATA	TIME_FILTER	L6M		5	L6M
<input type="checkbox"/>	MASTER_DATA	TIME_FILTER	L12M		6	L12M

If you want to change the text shown in the Time Filter selector (e.g. MTD Month To Date), you need to update the value of the column "Key Label" from "MTD" to "Month To Date". If you clear the value of this column, the Time Filter selector will show the value of the "Value" column.

b. Top/Worst Customers Selector Input

Top/Worst Customers : 5

5

10

20

50

100

Data for this selector are defined in Category = "MASTER_DATA" and Key Name = "TOP_WORST_CUSTOMERS".

<input type="checkbox"/>	Category	Key Name	Value	IsDefault	Order [^]
<input type="checkbox"/>	MASTER_DATA	TOP_WORST_CUSTOMERS	5	YES	1
<input type="checkbox"/>	MASTER_DATA	TOP_WORST_CUSTOMERS	10		2
<input type="checkbox"/>	MASTER_DATA	TOP_WORST_CUSTOMERS	20		3
<input type="checkbox"/>	MASTER_DATA	TOP_WORST_CUSTOMERS	50		4
<input type="checkbox"/>	MASTER_DATA	TOP_WORST_CUSTOMERS	100		5

If you want to add more values to this list, you need add a new row with same category and key name.

Example: To add a value "200" to the list and put it at the end of the list, you need to add the following:

<i>Category</i>	MASTER_DATA
<i>Key Name</i>	TOP_WORST_CUSTOMER
<i>Value</i>	200
<i>Is Default</i>	
<i>Order</i>	6
<i>Key Label</i>	
<i>Note</i>	

c. Top/Worst Products Selector Input

Top/Worst Products :

- 5
- 10
- 20
- 50
- 100

Data for this selector are defined in Category = "MASTER_DATA" and Key Name = "TOP_WORST_PRODUCTS".

<input type="checkbox"/>	Category	Key Name	Value	IsDefault	Order [^]
<input type="checkbox"/>	MASTER_DATA	TOP_WORST_PRODUCTS	5	YES	1
<input type="checkbox"/>	MASTER_DATA	TOP_WORST_PRODUCTS	10		2
<input type="checkbox"/>	MASTER_DATA	TOP_WORST_PRODUCTS	20		3
<input type="checkbox"/>	MASTER_DATA	TOP_WORST_PRODUCTS	50		4
<input type="checkbox"/>	MASTER_DATA	TOP_WORST_PRODUCTS	100		5

d. KPI Selector Input

KPI :

- Revenue
- Margin%
- Volume
- Health Score

Data for this selector are defined in Category = "MASTER_DATA" and Key Name = "KPI".

<input type="checkbox"/>	Category	Key Name	Value	IsDefault	Order	Key Label
<input type="checkbox"/>	MASTER_DATA	KPI	Revenue		1	Revenue
<input type="checkbox"/>	MASTER_DATA	KPI	Margin%		2	Margin %
<input type="checkbox"/>	MASTER_DATA	KPI	Volume		3	Volume
<input type="checkbox"/>	MASTER_DATA	KPI	Health Score	YES	4	Health Score

If you want to change the text shown in the KPI selector (e.g. "Margin %" "Margin Percent"), you need to update the value of the column "Key Label" from "Margin %" to "Margin Percent". If you clear the value of this column, the KPI selector will show the value of the "Value" column.

e. Display of Trend Columns in Table

In the tables of the dashboard, Trend columns are displayed with three formats based on the setting:

- Green and up arrow
- Orange and horizontal arrow
- Red and down arrow

Revenue Trend Last 12M	Margin Trend Last 12M	Volume Trend Last 12M	Revenue Trend YTD	Margin Trend YTD
▼ +28.91%	▼ +28.69%	▼ +27.98%	▼ -50.02%	▼ -52.47%
▷ +38.89%	▷ +37.65%	▷ +42.89%	▼ -67.92%	▼ -68.56%
▲ +97.94%	▲ +98.92%	▲ +99.17%	▼ -78.34%	▼ -78.35%
▷ +31.09%	▷ +31.53%	▷ +31.76%	▼ -71.02%	▼ -71.42%
▲ +90.12%	▲ +90.28%	▲ +88.31%	▼ -89.75%	▼ -90.92%
▷ +49.67%	▷ +50.02%	▷ +50.36%	▼ -82.62%	▼ -82.79%
▲ +94.66%	▲ +94.87%	▲ +95.60%	▼ -91.90%	▼ -92.56%
▲ +85.76%	▲ +86.99%	▲ +83.23%	▼ -92.03%	▼ -92.92%
▷ +32.11%	▷ +31.79%	▷ +32.01%	▼ -63.74%	▼ -64.49%
▼ +26.85%	▼ +24.70%	▼ +27.02%	▼ -77.15%	▼ -78.03%

You can define threshold values to match your business case - just update the value of the key name "TREND_UPPER" and "TREND_LOWER":

Green and up arrow	<i>Trend value</i> >= TREND_UPPER
Orange and horizontal arrow	TREND_LOWER < <i>Trend value</i> < TREND_UPPER
Red and down arrow	<i>Trend value</i> <= TREND_LOWER

<input type="checkbox"/>	Category	Key Name	Value	IsDefault	Order
<input type="checkbox"/>	CONFIGURATION	TREND_UPPER	0.6		
<input type="checkbox"/>	CONFIGURATION	TREND_LOWER	0.3		

f. Display of Health Score Columns

This column has the same display format as the trends columns but the threshold is different.

The Health Score column is included in two tables: Customer Health Summary Table (Customer Global View Dashboard) and Product Health Summary Table (Customer Product Portfolio View Dashboard):

Customer Health Summary

Customer Name	Customer Id	Health Score	Total Revenue	Total Margin	Total Volume	Margin %
▲ Price f(x) AG	CD-00004	▲ +90.00	866,606.35	378,324.25	293,646	43.66 %
▲ Soupo DE	CD-00012	▲ +80.00	738,321.58	304,753.92	250,492	41.28 %
▲ M. CH	CD-00011	▷ +50.00	719,403.64	295,578.76	243,226	41.09 %
▲ Steak House	CD-00013	▼ .00	475,263.12	160,130.34	157,388	33.69 %
▲ S. Sumito	CD-00015	▼ +25.00	475,205.47	162,427.59	158,491	34.18 %
▲ Appetito Mz	CD-00001	▲ +160.00	461,614.58	248,100.76	160,965	53.75 %
▲ Kraftmeat	CD-00014	▼ +25.00	456,796.04	155,090.03	150,906	33.95 %
▲ Francomeat	CD-00019	▼ .00	324,597.31	115,440.22	108,017	35.56 %

Product Health Summary

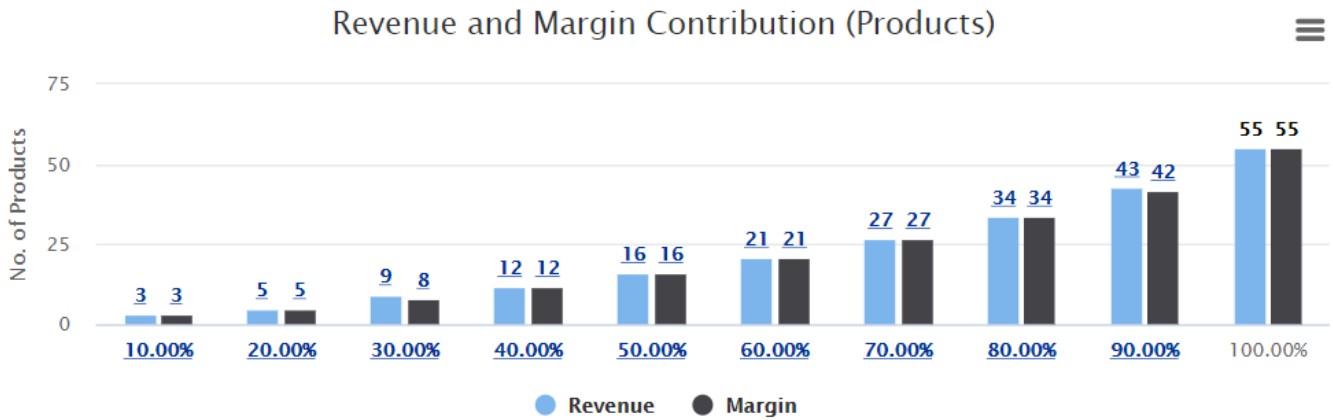
Product Name	Product Id	Health Score	Total Revenue	Total Margin	Total Volume	Margin %	F
▲ Configured Meatball	MB-0052	▼ +12.00	581.603	186.696	199	32.10 %	
▲ Meatball BI	MB-0003	▼ .00	151.946	41.479	65	27.30 %	
▲ Meatball PS	MB-0004	▼ .00	194.619	64.813	83	33.30 %	
▲ Meatball PM	MB-0005	▼ .00	547.02	178.147	177	32.57 %	
▲ Meatball PI	MB-0006	▼ .00	368.164	123.487	160	33.54 %	
▼ Sausage BS & Mustard	MB-0059	▼ .00	960.546	346.033	346	36.02 %	
▼ Bundle	MB-0060	▼ .00	521.522	198.547	200	38.07 %	
▼ Meal S	Meal-C090	▼ .00	523.216	179.727	205	34.35 %	
▼ Meatball BM	MB-0002	▼ .00	1,472.606	468.063	492	31.78 %	

You can define it in Category = "CONFIGURATION", the key name should be "CUSTOMER_HEALTH_SCORE_UPPER" and "CUSTOMER_HEALTH_SCORE_LOWER":

Green and up arrow	$Health\ Score \geq CUSTOMER_HEALTH_SCORE_UPPER$
Orange and horizontal arrow	$CUSTOMER_HEALTH_SCORE_LOWER < Health\ Score < CUSTOMER_HEALTH_SCORE_UPPER$
Red and down arrow	$Health\ Score \leq CUSTOMER_HEALTH_SCORE_LOWER$

<input type="checkbox"/>	Category	Key Name	Value	IsDefault	Order
<input type="checkbox"/>	CONFIGURATION	CUSTOMER_HEALTH_SCORE_UPPER	70		
<input type="checkbox"/>	CONFIGURATION	CUSTOMER_HEALTH_SCORE_LOWER	40		

g. Revenue and Margin Contribution Chart (Customer Product Portfolio Dashboard)



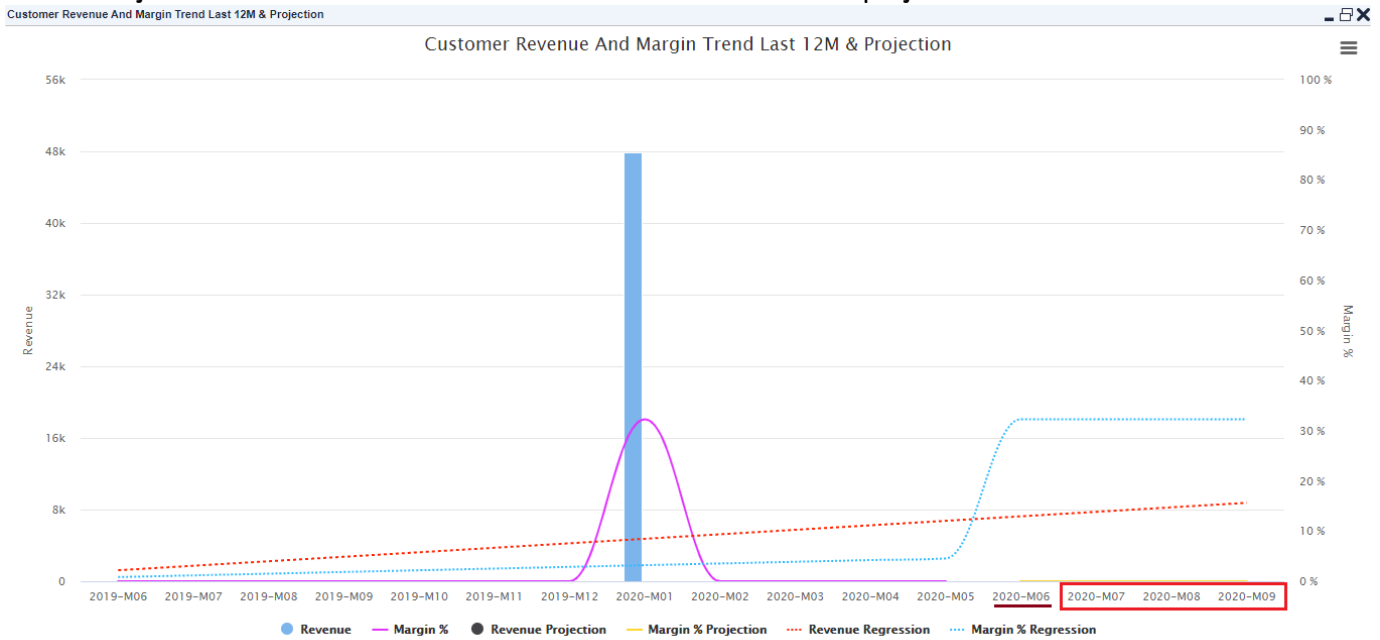
In this chart, you can re-define:

- Number of buckets - via the key name = "NUMBER_OF_BUCKETS"
- Percent of the start bucket / percent of the end bucket via the key name = "BUCKET_START_PERCENT" and "BUCKET_END_PERCENT"

Category	Key Name	Value	IsDefault	Order	Note
REVENUE_AND_MARGIN_CONTRIBUTION	NUMBER_OF_BUCKETS	10			
REVENUE_AND_MARGIN_CONTRIBUTION	BUCKET_START_PERCENT	0			
REVENUE_AND_MARGIN_CONTRIBUTION	BUCKET_END_PERCENT	100			

h. Number of Next months (Customer Detail View Dashboard)

In the Customer Detail View dashboard, we have two charts: "Customer Revenue And Margin Trend Last 12M & Projection" and "Number Of Transactions Trend Last 12M & projection".



The default number of next months is three. You can update this value in Category = "MASTER_DATA" and key name = "NEXT_MONTH_AMOUNT".

<input type="checkbox"/> Category	Key Name	Value	IsDefault	Order	Note
<input type="checkbox"/> MASTER_DATA	NEXT_MONTH_AMOUNT	3			

1.2. Pre-Processing (Simulation Logic) Configuration

a. Customer Health Score

For more details see <https://pricefx.atlassian.net/wiki/spaces/ACCDEV/pages/1903658910/Glossary#Customer-Insights>.

Health Score = Revenue Score * Revenue Weight + Margin Score * Margin Weight

Note: Revenue Weight + Margin Weight = 1

Revenue Score / Margin Score is based on the defined table (the Trend value is the revenue/margin trend last 12M):

Trend	Health Score
>25%	100
15% - 25%	75
5% - 15%	60
-5% - 5%	50
-5% - -15%	40
-15% - -25%	25
< -25%	0

You can change the threshold trends value in the PP as shown below:

<input type="checkbox"/> Category	Key Name	Value	IsDefault	Order
<input type="checkbox"/> SCORE_CLASSIFICATION	100	0.25		1
<input type="checkbox"/> SCORE_CLASSIFICATION	75	0.15		2
<input type="checkbox"/> SCORE_CLASSIFICATION	60	0.05		3
<input type="checkbox"/> SCORE_CLASSIFICATION	50	-0.05		4
<input type="checkbox"/> SCORE_CLASSIFICATION	40	-0.15		5
<input type="checkbox"/> SCORE_CLASSIFICATION	25	-0.25		6
<input type="checkbox"/> SCORE_CLASSIFICATION	0	-10		7

You can change the Revenue Weight and Margin Weight values in the Price Parameter.

- If you set just the value of Revenue Weight, the system will calculate Margin Weight = (1 - Revenue Weight) automatically.
- If you set just the value of Margin Weight, the system will calculate Revenue Weight = (1 - Margin Weight) automatically.
- If you do not set either of these values, the default value is: Revenue Weight = Margin Weight = 0.5.

<input type="checkbox"/>	Category	Key Name	Value	IsDefault	Order
<input type="checkbox"/>	CONFIGURATION	REVENUE_WEIGHT	0.5		
<input type="checkbox"/>	CONFIGURATION	MARGIN_WEIGHT	0.5		

b. Customer Revenue Classification

The simulation logic uses this setting to identify the customer classification based on the contribution and cumulative revenue contribution of each customer.

You can change the threshold value and label (show on the dashboard) in the PP as shown below:

<input type="checkbox"/>	Category	Key Name	Value	IsDefault	Order	Key Label	Note
<input type="checkbox"/>	CUSTOMER_CLASSIFICATION_REVENUE	A	20		1	A	Simulation logic
<input type="checkbox"/>	CUSTOMER_CLASSIFICATION_REVENUE	B	50		2	B	Simulation logic
<input type="checkbox"/>	CUSTOMER_CLASSIFICATION_REVENUE	C	80		3	C	Simulation logic
<input type="checkbox"/>	CUSTOMER_CLASSIFICATION_REVENUE	D	100		4	D	Simulation logic

c. Customer Health Score Classification

This classification is based on the customer health score - the simulation logic assigns customers to different classes based on Health Score.

You can change the threshold value and label (shown on the dashboard) in the PP as shown below:

<input type="checkbox"/>	Category	Key Name	Value	IsDefault	Order	Key Label	Note
<input type="checkbox"/>	CUSTOMER_CLASSIFICATION_HEALTH	EXCELLENT	75		1	Excellent	Simulation logic
<input type="checkbox"/>	CUSTOMER_CLASSIFICATION_HEALTH	GOOD	50		2	Good	Simulation logic
<input type="checkbox"/>	CUSTOMER_CLASSIFICATION_HEALTH	NORMAL	25		3	Normal	Simulation logic
<input type="checkbox"/>	CUSTOMER_CLASSIFICATION_HEALTH	PROBLEMATIC	0		4	Problematic	Simulation logic

d. Product Quantity Classification

The simulation logic uses this setting to identify the product classification based on the contribution and cumulative volume contribution of each product.

You define the threshold value in this PP, for example:

Class	Cumulative volume contribution per product (Threshold)
Very High Volume	<= 10%
High Volume	<= 20%
Normal Volume	<= 75%
Low Volume	rest

You must update the threshold value and label (shown on the dashboard) in the PP as shown below:

<input type="checkbox"/>	Category	Key Name	Value	IsDefault	Order	Key Label	Note
<input type="checkbox"/>	PRODUCT_CLASSIFICATION_QUANTITY	VERY_HIGH	10			1 Very High	Simulation logic
<input type="checkbox"/>	PRODUCT_CLASSIFICATION_QUANTITY	HIGH	20			2 High	Simulation logic
<input type="checkbox"/>	PRODUCT_CLASSIFICATION_QUANTITY	NORMAL	75			3 Normal	Simulation logic
<input type="checkbox"/>	PRODUCT_CLASSIFICATION_QUANTITY	LOW	100			4 Low	Simulation logic

e. Commodity vs. Specialty Product Classification

The simulation logic uses this setting to identify if a product is Commodity or Specialty Product.

It is defined based on an average margin achieved by the product.

<i>Speciality</i>	>= 30%
<i>Commodity</i>	rest

You can update the threshold value and label (shown on the dashboard) in the PP as shown below:

<input type="checkbox"/>	Category	Key Name	Value	IsDefault	Order	Key Label	Note
<input type="checkbox"/>	PRODUCT_CLASSIFICATION_HEALTH	SPECIALITY	30			1 Speciality	Simulation logic
<input type="checkbox"/>	PRODUCT_CLASSIFICATION_HEALTH	COMMODITY	0			2 Commodity	Simulation logic

2. PFXTemplate_CustomerInsights_Customer_Segment

This table is used to define the customer segmentation. Customer segments can be obtained from multi data source types such as: data source, customer master, customer extensions. You can define it in this table.

You can add more customer attributes to the table if they are not present yet.

Set the value of the Is Active column to "YES", if you want to add this attribute into the segmentation processing and exclude the field with isCustomerId = YES. The field set to Is Customer Id = "YES" will **not** join into the segment data, the system uses it as a key to find data.

1	Source Type	Data Source types from which we get data for the customer segments. They include: DMDS (Data Source), C (Customer Master), CX (Customer Extension).
2	Source Name	Data source name
3	Source Field	Source Field in the Data Source.
4	Field Label	Label of the field in the Data Source
5	Is Active	If set to 'YES', the dashboard will add this field in the segmentation
6	Is Customer Id	If this field is customer ID in a Data Source, set the value to 'YES'. It helps the system get the correct "Customer Id" field in the source. If the Data Source is Customer Master or Customer Extension, you do not need to add the "customer Id" field name.

If the Data Source is datasource, you must add the "customer Id" field name.

Note: For the field you want to be a key to find data in DMDS, you need to set IsActive = "YES" and IsCustomerId = YES".

Example:

We define that a customer segment will be obtained from the Data Source named 'Customer' with these parameters:

Case 1: Segment data query from one source

Customer Type = active

Region = active

3 Customer Types = {Enduser, Industry, Restaurant}

4 Regions = {America, Oceania, Asia, Europe}

=> We will have 3*4 = 12 Customer segments = {Enduser_America, Enduser_Oceania,.....}

Note: In case the customer segment is queried from a Data Source, we **must** add the 'customer Id' field name in this source and set the value to 'YES' in the 'Is Customer Id' column.

<input type="checkbox"/>	Source Type	Source Name	Source Field	Field Label	Is Active	Is Customer Id
<input type="checkbox"/>	C	Customer	attribute1	Customer Group		
<input type="checkbox"/>	C	Customer	attribute2	Customer Type		
<input type="checkbox"/>	C	Customer	attribute3	Customer Class		
<input type="checkbox"/>	C	Customer	attribute4	Region		
<input type="checkbox"/>	DMDS	Customer	CustomerId		YES	YES
<input type="checkbox"/>	DMDS	Customer	CustomerType	Customer Type	YES	
<input type="checkbox"/>	DMDS	Customer	Region	Region	YES	

Case 2: Segment data query from 2 sources:

Customer Type: get from Customer Master

Region: get from DMDS "Customer"

You need to create a configuration like this:

<input type="checkbox"/>	Source Type	Source Name	Source Field	Field Label	Is Active	Is Customer Id
<input type="checkbox"/>	C	Customer	attribute1	Customer Group		
<input type="checkbox"/>	C	Customer	attribute2	Customer Type	YES	
<input type="checkbox"/>	C	Customer	attribute3	Customer Class		
<input type="checkbox"/>	C	Customer	attribute4	Region		
<input type="checkbox"/>	DMDS	Customer	CustomerId		YES	YES
<input type="checkbox"/>	DMDS	Customer	CustomerType	Customer Type		
<input type="checkbox"/>	DMDS	Customer	Region	Region	YES	

Important Note:

- When querying segment data from multiple sources, the system will take time to process (query and combine). You should consider this issue before processing.
- If the segment data is large and complex for combination, you should create a DMDS to build the customer segment data first, then use it in this configuration for Customer Insight.

3. CurrencySymbols

This is a Price Parameter of Sales Insights Package and it should be deployed by this package. Customer Insights re-uses it to show the currency symbol in charts. If your currency is missing, you can add it to this table.

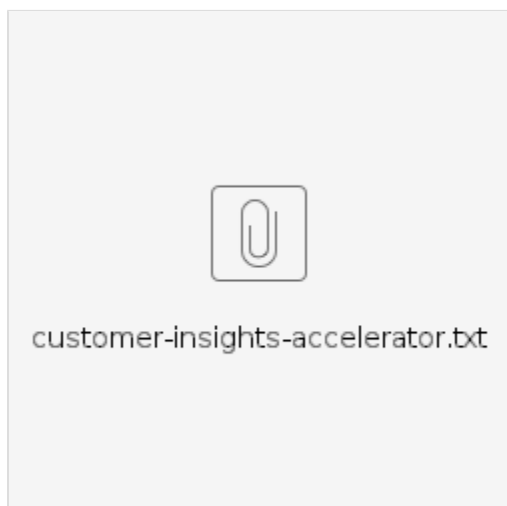
<input type="checkbox"/>	Name	Value
<input type="checkbox"/>	AUD	\$
<input type="checkbox"/>	NZD	\$
<input type="checkbox"/>	USD	\$
<input type="checkbox"/>	HKD	\$
<input type="checkbox"/>	EUR	€
<input type="checkbox"/>	JPY	¥
<input type="checkbox"/>	GBP	£
<input type="checkbox"/>	CHF	CHF

II. Advanced Configuration Options

The Customer Insights Dashboard also uses the Advanced Configuration Option (AP) with the name "customer-insights-accelerator" to store:

- Data source information
- Mapping fields

This is a template for this AP:



III. Waterfall Chart Configuration

Because Customer Insights is an extension of Sales Insights, the configuration of waterfall chart is re-used from Sales Insights. To update the waterfall configuration, follow [Waterfall Dashboard - Details on Configuration](#).

Customer Insights Dashboard Release Notes

- [Customer Insights Dashboard 1.4](#)
- [Customer Insights Dashboard 1.3](#)
- [Customer Insights Dashboard 1.2](#)
- [Customer Insights Dashboard 1.1](#)
- [Customer Insights Dashboard 1.0](#)

Customer Insights Dashboard 1.4

Improvements

[PFPCS-3693](#) Add DISTINCT into SQL

[PFPCS-3674](#) Mapped Customer parameter for Detail View

[PFPCS-3669](#) Detail View > Revenue and Margin > No-data indication

[PFPCS-3656](#) Summary portlets - no data indication

[PFPCS-3655](#) Detail View - Waterfall - no-data indication

[PFPCS-3628](#) Update Get currency of Datamart

[PFPCS-3530](#) Customer segment PP - more effective default setting

[PFPCS-3525](#) Update deployment script for customer insight

[PFPCS-3474](#) Dashboards labels adjustment

[PFPCS-3404](#) Detail View - Revenue Breakdown - no-data indication

[PFPCS-3403](#) Create some wrapper for SummaryPortletUtils.initTableItem()

[PFPCS-3350](#) [Simulation] Update some elements to improve performance

[PFPCS-3348](#) [Simulation] Update cache in some elements and function to improve performance

[PFPCS-3337](#) [Simulation] Update SQL for Customer Classification by Revenue and Product Classification by Volume

[PFPCS-3322](#) [Simulation] Update element GetProductAvgPriceByCustomer And ProductAvgPriceByCustomer

[PFPCS-3300](#) Multiple sources for Customer segment

[PFPCS-3298](#) [CID] add into Simulation more field ProductClassificationByHealthScore.

[PFPCS-3238](#) Charts > Add 1000 separator to displayed number

[PFPCS-3203](#) Product Portfolio - Health Score filter

[PFPCS-3202](#) Detail View - Health Score filter

[PFPCS-3199](#) Global View - Health Score

[PFPCS-3198](#) Product Portfolio - Product Class filter

[PFPCS-3197](#) Detail View - Product Class filter

[PFPCS-3196](#) Global View - Customer Class filter

Tasks

[PFPCS-3489](#) [Simulation] Update parameter structure based on solution as dashboard

[PFPCS-3438](#) Detail View - Update waterfall chart in CID because SIP_Dashboards_commons had been changed

[PFPCS-3410](#) [CID] typo in the element name "CustomerProductPortfolioDahboardUtils"

[PFPCS-3355](#) Split Calculation element in CustomerInsights library into 3 sub-elements

[PFPCS-3338](#) Detail View > Pass values in new filters to Portfolio dashboard

[PFPCS-3280](#) [Customer Detail View] Check changes in SIP_Dashboards_commons and update for CID [PFPCS-3256](#) Check whether it's possible to move certain calculations to SQL

[PFPCS-3177](#) The InputParams solution: new structure

[PFPCS-3053](#) Redesign Customer Segment PP Table

Bugs

[PFPCS-3699](#) Detail View > Waterfall chart display value when no data

[PFPCS-3386](#) Total number values in tables should be integer

Customer Insights Dashboard 1.4.5

Bugs

[PFPCS-4284](#) [Simulation] wrong calculation of YTD Trends