

Dynamics 365 – Customer Insights



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Our Microsoft Dynamics 365 Consulting, Development, Customization, Integration services and solutions, can help companies maximize business performance, overcoming market challenges, achieving profitability and providing best customer service.

Contents

1.	Dynamics 365 Customer Insights	5
2.	Choose a capability	5
3.	Audience insights for Dynamics 365 Customer Insights	6
3.1	Main Benefits	6
3.2	Key audiences	6
4.	Data Source	7
4.1	Add a data source	7
4.2	Review ingested data	7
5.	Connect to a Common Data Model folder using an Azure Data Lake account.....	8
5.1	Important considerations	8
5.2	Incremental refresh for data sources based on Power Query.....	9
5.3	Configure incremental refresh	9
6.	Real-time data ingestion	10
6.1	Limitations.....	10
6.2	Real-time creation of activities	10
6.3	Connect directly to the real-time API	11
6.4	Entities in audience insights.....	11
6.5	Corrupted data sources	11
7.	Segments.....	12
7.1	Create a new segment	12
7.2	Manage existing segments.....	12
7.3	Refresh segments.....	13
7.4	Export segments	13
8.	Service limits in Dynamics 365 Customer Insights audience insights capability	13
9.	Dynamics 365 Customer Insights engagement insights	14
9.1	Features and benefits	14
10.	Glossary.....	14
10.1	Base event.....	14
10.2	Dimensions.....	14
10.3	Event	14
10.4	Environment.....	15
10.5	Member	15

10.6	Metric.....	15
10.7	Refined event.....	15
10.8	Report	15
10.9	Workspace	15
11.	View Reports.....	15
11.1	Real-time usage report	15
11.2	Key metrics reports.....	15
11.3	Content reports.....	16
11.4	Traffic sources reports	16
11.5	Visitor profiles reports	16
11.6	Mobile reports	16
11.7	Real-time usage.....	16
11.8	App reports	16
11.9	User reports	16
11.10	Filter by time or value	17
12.	Funnel Report	17
12.1	Create a funnel report	17
12.2	Configure advanced settings.....	18
12.3	Cross-channel funnel reports.....	19
12.4	Create a cross-channel funnel report	19
12.5	Change the date range for the funnel report	20
12.6	Edit or delete funnel reports.....	20
12.7	Rename or delete a funnel report	20
12.8	Edit a funnel step	20
12.9	Reorder a funnel step	20
12.10	Delete a funnel step.....	20
13.	Roles and permissions.....	20
13.1	Permissions	21
14.	Manage environments and workspaces	21
14.1	Choose an environment and create a workspace	22
14.2	Manage a workspace	22
14.3	Edit a workspace name	23
14.4	Delete a workspace.....	23

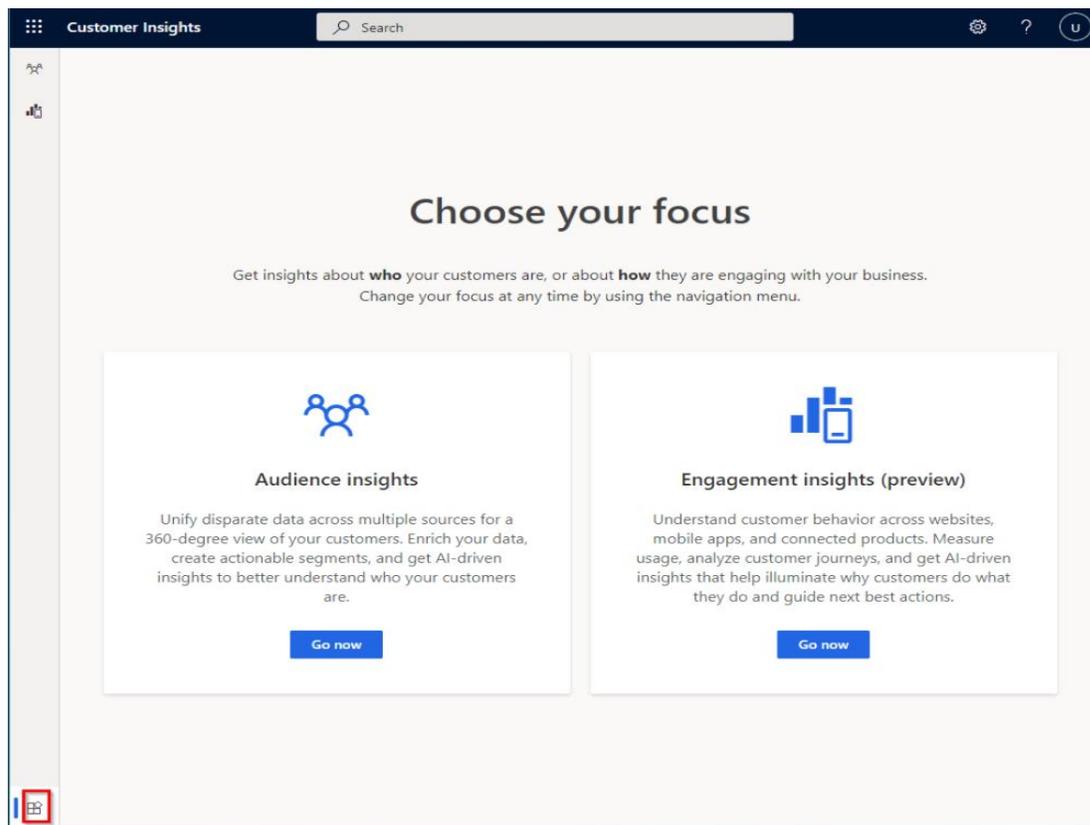
14.5	Manage workspace members.....	23
15.	Engagement insights limits	23
16.	Conclusion.....	23

1. DYNAMICS 365 CUSTOMER INSIGHTS

Dynamics 365 Customer Insights is a part of Microsoft's customer data platform (CDP) that helps deliver personalized customer experiences. The platform's capabilities provide insights into who your customers are and how they engage with your platform. Unify customer data across multiple sources to get a single view of customers.

- Audience insights helps you transform your business into a customer-centric organization. Marketing, sales, and service professionals have the insights they need to personalize experiences. Connect data from transactional, behavioral, and observational sources to create a 360-degree customer view. See results faster with a CDP designed to deliver insights that can be acted upon.
- Engagement insights (preview) enables you to understand interactively, how your customers are using your services and products – both individually and holistically – on websites, mobile apps, and connected products. Combine behavioral analytics with transactional, demographic, survey, and other data types from Microsoft Dynamics 365 Customer Insights. Maintain full control over your customer data to ensure the highest level of data governance and compliance

2. CHOOSE A CAPABILITY



To choose a capability

- In the navigation pane, select All apps to open the Choose your focus window.
- Select Go now to navigate to the capability of your choice

3. AUDIENCE INSIGHTS FOR DYNAMICS 365 CUSTOMER INSIGHTS

Audience insights helps you build a deeper understanding of your customers. Connect data from various transactional, behavioral, and observational sources to create a 360-degree customer view. Use these insights to drive customer-centric experiences and processes. Unify and understand customer data and harness it for intelligent insights and actions.

3.1 Main Benefits

- Eliminate data silos and unify customer data
 - Connect and unify your data with ease—bring in transactional, observational, and behavioral data from popular data sources by using prebuilt connectors.
 - Transform customer data intelligently—build unified customer profiles conforming to the Common Data Model. Resolve customer identities with AI/ML-driven recommendations.
- Enrich with audience intelligence
 - Build richer customer profiles by incorporating enriched data.
- Power your business processes and personalized customer experiences
 - Drive personalized engagement across channels—empower marketing, sales, and service professionals with out-of-the-box, contextual customer insights and tailored customer profile cards infused into the business applications they already use every day
 - Automate customer-centric experiences and processes based on customizable profiles, business measures, and segments.
 - Enable and extend line-of-business experiences built on Microsoft Power Platform. Quickly build applications with embedded insights using a powerful low code approach from PowerApps.

3.2 Key audiences

- Data analysts / admins:
 - Access to a rich collection of connectors to ingest all your customer data.
 - Ability to unify customer data and transform it into the Common Data Model format.
 - Enrich customer information with insights from audience intelligence, such as brand affinity and interests.
 - "Clicks-not-code" configuration and debugging experience to help easily configure audience insights and identify potential issues.
 - Cleanse and standardize customer data across disparate sources with AI-powered recommendations.
- Business users:
 - Insights into 360-degree customer profiles and end-to-end views of the customer journey.

- View 360-degree customer data within Dynamics 365 business processes with prebuild packages.
- Business analysts:
 - customizable profiles, define measures, create segments, and benefit from predictive analytics to get a 360-degree view of your customer, specific to your organization.
 - Use out-of-box connectors for several Microsoft and third-party applications or APIs to further process the insights.

4. DATA SOURCE

The audience insights capability in Dynamics 365 Customer Insights connects to data from a broad set of sources. Connecting to a data source is often referred to as the process of data ingestion. After ingesting the data, you can unify and take action on it.

4.1 Add a data source

Refer to the detailed articles on how to add a data source, depending on which option you choose.

You can add a data source in three main ways:

- Through dozens of Power Query connectors
- From a Common Data Model folder
- From your own Microsoft Dataverse lake

4.2 Review ingested data

You'll see the name of each ingested data source, its status, and the last time the data was refreshed for that source. You can sort the list of data sources by every column.

Data sources

Name ↑	Entities	Status	Refreshed
CRM	6	✓ Successful	18 minutes ago
ERP	5	✓ Successful	20 minutes ago
IncrementalIngestion	3	✓ Successful	24 minutes ago
MarketingCampaign	0	Not started	Never
TestForGUID	2	○ Refreshing	27 minutes ago

Status	Description
Successful	Data source was successfully ingested if a time is mentioned in the Refreshed column.
Not started	The data source has no data ingested yet or still in draft mode.
Refreshing	Data ingestion is in progress. You can cancel this operation by selecting Stop refreshing in the Actions column. Stopping the refresh of a data source will revert it to its last refresh state.
Failed	Data ingestion ran into errors.

5. CONNECT TO A COMMON DATA MODEL FOLDER USING AN AZURE DATA LAKE ACCOUNT

Before connecting the Dataverse, these important instructions should be kept in mind.

5.1 Important considerations

- Data in your Azure Data Lake needs to follow the Common Data Model standard. Other formats aren't supported at the moment.
- Data ingestion supports Azure Data Lake Gen2 storage accounts exclusively. You can't use Azure Data Lake Gen1 storage accounts to ingest data.
- To authenticate with an Azure service principal, make sure it's configured in your tenant. For more information, see [Connect audience insights to an Azure Data Lake Storage Gen2 account with an Azure service principal](#).
- The Azure Data Lake you want to connect and ingest data from have to be in the same Azure region as the Dynamics 365 Customer Insights environment. Connections to a Common Data Model folder from a data lake in a different Azure region is not supported. To know the Azure region of the environment, go to **Admin > System > About** in audience insights.
- Data stored in online services, may be stored in a different location than where data is processed or stored in Dynamics 365 Customer Insights. By importing or connecting to data stored in online services, you agree that data can be transferred to and stored with Dynamics 365 Customer Insights.

5.2 Incremental refresh for data sources based on Power Query

Incremental refresh for data sources provides the following advantages:

- **Faster refreshes** - Only data that has changed gets refreshed. For example, you might refresh only the past five days of a historical dataset.
- **Increased reliability** - With smaller refreshes, you don't need to maintain connections to volatile source systems for as long, reducing the risk of connection issues.
- **Reduced resource consumption** - Refreshing only a subset of your total data leads to more efficient use of computing resources and decreases the environmental footprint.

5.3 Configure incremental refresh

Audience insights allows incremental refresh for data sources imported through Power Query that support incremental ingestion. For example, Azure SQL databases with date and time fields, which indicate when data records were last updated.

- Create a new data source based on Power Query.
- Provide a name for the data source.
- Select a data source that supports incremental refresh, such as Azure SQL database.
- Select the entities or tables to ingest.
- Complete the transformation steps and select Next.
- In the Set up incremental refresh dialog box, select Set up to open the Incremental refresh settings. If you select Skip, the data source will refresh the entire data set.
- On Incremental refresh settings, you'll configure the incremental refresh for all entities that you selected when creating the data source.

Incremental refresh settings

Incremental refresh can speed up the refresh process by only updating records that have changed, instead of an entire entity. Any SQL data set with a date/time field indicating when rows of data were last updated will be available to set up.

ContactIncremental
Full refresh

Contact10
Full refresh

ContactFull
Full refresh

Define the primary key * ⓘ

Select field

Define the "last updated" field *

Select field

Check for updates every

Days

- Select an entity, and provide the following details.
 - **Define the primary key:** Select a primary key for the entity or table.
 - **Define the "last updated" field:** This field will only display attributes of type date or time. Select an attribute that indicates when the records were last updated. It will be used to identify the records that fall within the incremental refresh time frame.
 - **Check for updates every:** Specify how long you want the incremental refresh time frame to be.
- Select Save to complete the creation of the data source. The initial data refresh will be a full refresh. Afterwards, the incremental data refresh happens as configured in the previous step.

6. REAL-TIME DATA INGESTION

The near real-time functionality lets you see, within seconds, the latest interactions that your customers have made with your products or services.

Scheduled refreshes include large numbers of records and several complex operations. First, data is pulled from the data source. Next, the data is unified, and then enriched with additional information. Every run of this process can take minutes to hours.

The real-time functionality provides data immediately for consumption, until the subsequent scheduled refresh pulls this data from the data source.

Real-time updates have an expiration time after which they no longer override the value from the data source:

- Profile updates will be kept for 4 hours
- Activities will be kept for 30 days

These values are API call parameters that you can change. They aim to ensure that your source data remains your source of truth. If you want real-time updates to be included for longer, you need to add them to a data source so they get pulled during the next scheduled refresh.

6.1 Limitations

- Customer profiles can be updated, but not created or deleted.
- Exporting real-time updates to external systems, like Power BI, is not possible at the moment.

6.2 Real-time creation of activities

The real-time API lets you publish a new activity from your source system (an individual source record) to a unified customer profile. The new activity will be available as a unified activity in that unified customer profile's timeline within seconds. You can see the timeline in the customer card view or any other timeline integration you configured.

There are two ways to connect to the real-time API:

- indirectly, using the Dynamics 365 Customer Insights connector
- directly, with code

Both ways share the following prerequisites:

- A Customer Insights environment
- Unified customer profiles
- Activities configured and run
- Contributor or Administrator permissions to authenticate your account

6.3 Connect directly to the real-time API

You can use the real-time capabilities by building your own pipeline and connecting directly to the real-time API.

You can post an activity in the format of your source system or in the UnifiedActivity format. Get the format by making an API call to `/api/instances/{instanceId}/manage/entities/UnifiedActivity`.

6.4 Entities in audience insights

After configuring your data sources, go to the Entities page to evaluate the quality of the ingested data. Entities are considered datasets. Multiple capabilities of Dynamics 365 Customer Insights are built around these entities. Reviewing them closely can help you validate the output of those capabilities.

The Entities page lists entities and includes several columns:

- **Name:** The name of your data entity. If you see a warning symbol next to an entity name, it means that the data for that entity didn't load successfully.
- **Source:** The type of data source that ingested the entity
- **Created by:** Name of the person who created the entity
- **Created:** Date and time of the entity creation
- **Updated by:** Name of the person who updated the entity
- **Last updated:** Date and time of the last update of the entity
- **Last refresh:** Date and time of the last data refresh

6.5 Corrupted data sources

Fields from an ingested data source can contain corrupted data. Records with corrupted fields are exposed in system-created entities. Knowing about corrupted records helps you identify which data to review and update on the source system. After the next refresh of the data source, the corrected records are ingested to Customer Insights and passed on to downstream processes.

For example, a 'birthday' column has the datatype set as 'date'. A customer record has their birthday entered as '01/01/1977'. The system will flag this record as corrupted. Someone can now change the birthday in the source system to '1977'. After an automated refresh of data sources, the field now has a valid format and the record will be removed from the corrupted entity.

Go to Data > Entities and look for the corrupted entities in the System section. Naming schema of corrupted entities: 'DataSourceName_EntityName_corrupt'.

Customer Insights still processes corrupted records. However, they might cause issues when working with the unified data.

The following checks run on the ingested data to expose corrupted records:

- The value of a field doesn't match with the data type of its column.
- Fields contain characters that cause the columns to not match the expected schema. For example: incorrectly formatted quotes, unescaped quotes, or newline characters.
- If there are datetime/date/datetimesoffset columns, their format needs to be specified in the model if doesn't follow the standard ISO format.

7. SEGMENTS

Segments let you group your customers based on demographic, transactional, or behavioral attributes. You can use segments to target promotional campaigns, sales activities, and customer support actions to achieve your business goals.

Customer profiles that match the filters of a segment definition are referred as members of a segment. Some service limits apply.

7.1 Create a new segment

There are multiple ways to create a new segment:

- Complex segment with segment builder: Blank segment
- Simple segments with one operator: Quick segment
- AI-powered way to find similar customers: Similar Customers
- AI-powered suggestions based on measures or attributes: Suggested segments to improve measures
- Suggestions based on activities: Suggested segments based on customer activity

7.2 Manage existing segments

Go to the Segments page, to view all your saved segments and manage them.

Each segment is represented by a row that includes additional information about the segment.

The following action are available when you select a segment:

- View the segment details, including member count trend a preview of segment members.
- Edit the segment to change its properties.
- Create duplicate of a segment. You can choose to edit its properties right away or simply save the duplicate.
- Refresh the segment to include the latest data.
- Activate or Deactivate the segment. Segments have two possible states - active or inactive. These states come in handy when editing a segment. For inactive segments, the segment definition exists but it doesn't contain any customers yet. When you activate a segment, its state

changes from 'inactive' to 'active' and it starts looking for customers that match the segment definition.

- Rename the segment.
- Download the list of members as a .CSV file.
- Manage exports to see exports related segment and manage them.
- Delete the segment.

7.3 Refresh segments

You can refresh all segments at once by selecting Refresh all on the Segments page or you can refresh one or multiple segments when you select them and choose Refresh in from the options. Alternatively, you can configure a recurring refresh on Admin > System > Schedule.

7.4 Export segments

You can export a segment from the segments page or the exports page.

- Go to the Segments page.
- Select Show more [...] for the segment you want to export.
- Select Manage exports from the actions dropdown list.
- The page Exports (preview) for segment opens. You can see all configured exports grouped by exports that contain the current segment or don't contain it.
 - To add the selected segment to an export, select the export in the list and select Add segment.
 - To create a new export with the selected segment, select Add export. For more information about creating exports, see Set up a new export.
- Select Back to return to the main page for segments.

8. SERVICE LIMITS IN DYNAMICS 365 CUSTOMER INSIGHTS AUDIENCE INSIGHTS

CAPABILITY

The built-in limits to the Customer Insights service, which are designed to ensure the reliability and stability of the service. Any requests for changes can be made through the Ideas forum.

Area	Limits	Notes
Segments and measures	100 segments or measures.	The total number of active segments and measures combined can't exceed 100.

9. DYNAMICS 365 CUSTOMER INSIGHTS ENGAGEMENT INSIGHTS

Engagement insights capability enables you to understand interactively, how your customers are using your services and products – both individually and holistically – on websites, mobile apps, and connected products.

You can combine behavioral analytics with transactional, demographic, survey, and other data types from Microsoft Dynamics 365 Customer Insights. The combination creates rich insights that help drive next best actions and personalized experiences.

9.1 Features and benefits

- Collect, measure, and understand customer behavior on your website.
- Use out-of-box reports to access site metrics interactively and see the size of your audience. Find out dimensions. The visualizations create the views you need to answer your business questions.
- Bring in data from multiple channels. For example, use behavioral data from website interactions with transactional and demographic data about your customers. Use the data to build and view interactive reports that include web activities details about visits, page views, referral traffic, and identify pages with the best performance.
- Use the custom report builder to build your own visualizations based on selected metrics and customer profiles for rich analytics. Create and export refined events. View web activities with customer profiles, activities, and segments in Customer Insights for a 360-degree view of your customers

10. GLOSSARY

This list defines selected terms that appear in Dynamics 365 Customer Insights engagement insights capability and in its supporting documentation.

10.1 Base event

A base event is a set of data representing activity on a website, such as a page view or click.

10.2 Dimensions

Dimensions are attributes of events that can describe, filter, or group data. For example, you can select operating system (OS), browser, or page name as a dimension in a report.

10.3 Event

In digital analytics, an event represents user behavior. An event records when a user views a page (view event) or interacts with content (action event). Activity data from your website is captured as base events. For reporting, you can decide the properties of the data that you want display. This virtual view of the data is called a refined event.

10.4 Environment

An environment is a space that can contain one or more workspaces. You can use an environment to manage your workspaces and connections to Customer Insights audience insights capability.

10.5 Member

A member of a workspace is a user who can access a workspace. Members can have roles, which allow the user to manage the workspace, its data, and view reports. Currently, Owner is the only role available in engagement insights capability.

10.6 Metric

A metric is a quantifiable measurement of data used to track or assess a process. Page views and average time spent on site are examples of relevant metrics.

10.7 Refined event

A refined event is a virtual view of a base event filtered by specific properties of the data. Use refined events to simplify a base event for export or to remove properties from an event that aren't necessary for exposure or export.

10.8 Report

A report is a collection of data visualizations that help you measure and understand user behavior. Engagement insights capability includes several predefined reports for web projects. You can also create custom reports.

10.9 Workspace

A workspace is how you store and manage events and reports. It's where you can view user activity in real time. When you create a workspace, you select the type of data you will send to the workspace.

11. VIEW REPORTS

A report is a collection of data visualizations, using the data collected through the SDK, that help you measure and understand user behavior. Dynamics 365 Customer Insights engagement insights include out-of-the-box (OOB) reports for web and mobile projects.

11.1 Real-time usage report

The Real-time usage report provides an overview of current activity on your site that automatically refreshes every minute. Use real-time usage to monitor the impact of marketing campaigns, press events, and other scenarios on your site's traffic.

11.2 Key metrics reports

- Page views list the page views for individual pages along with the number of total page views over the selected time frame.

- Visits show information about the number of visits and the visit duration.
- Visitors inform about new and returning unique visitors to your site.

11.3 Content reports

- Links show information about the number and type of clicks.
- Exit pages list the links that visitors clicked to exit your site.

11.4 Traffic sources reports

- Referrers list the domains and URLs that referred visitors to your site.
- Tracking codes provide details about the tracking codes in the links that brought visitors to your site.

11.5 Visitor profiles reports

- Devices list the physical devices that were used to access your site.
- OS & browsers provide insights into the operating systems and browsers that were running when accessing your site.
- Locations show information about visitors by country, region, and city.
- Languages list page views by the visitor's preferred languages.

11.6 Mobile reports

- Mobile reports are grouped in real-time usage, app, and user categories. You can access mobile reports under Discover in the left navigation pane.

11.7 Real-time usage

- Real-time usage provides an overview of current activity in your mobile app that automatically refreshes every minute. Use real-time usage to monitor the number of users and sessions currently active in your app and the top screen views.

11.8 App reports

- Screen views list screen views for individual screens in an app and the total number of screen views over a selected time frame. You can view screen views by screen name or by screen title.
- Sessions show information about the number of sessions and the session duration.
- Return frequency groups session counts by the number of days since the last session.
- Users show new and returning users in your mobile app.
- Events list all the events collected from your app, plus the total count for each event.

11.9 User reports

- App versions list the versions of your mobile app in use by your user base.
- Devices & OS versions provide insights into which devices and operating systems are running your mobile app.
- Locations show information about app users by country, region, and city.

11.10 Filter by time or value

You can select the time frame or value in a web or mobile report to focus on a value or time period.

- To select a time frame, select More [...] from the dropdown list of the report. Time range selection is disabled for a real-time usage report; the time range for a real-time usage report is “now.”
- In most reports, select a value in a chart or list to filter the report for the selected value.

12. FUNNEL REPORT

A funnel report collects information about the steps that occur during a customer journey through your website or mobile app. It helps you understand how an audience progresses through a process and identifies drop-off points. For example, you can use a funnel report to identify paths your customers take before they make a purchase. A funnel report provides data to inform decisions and identify areas for optimization and process improvements.

12.1 Create a funnel report

To create the funnel report, specify the steps that you want to include and the activity for each step. An activity is an event that represents user behavior. The funnel report displays the number of users who completed each defined step.

- Go to Funnels and select +New funnel to start a funnel report.
- In the Funnel Editor, under Steps select +Add step.
- Enter a name in Step title.

The screenshot displays the Dynamics 365 Funnel Editor interface. At the top, a green status bar indicates "Data is flowing". Below it, there are "Save" and "Refresh" buttons, and a "6 hours" time filter. The main content area is titled "New funnel" and features a placeholder for a funnel chart. On the right side, a sidebar titled "Funnel Editor" is visible, containing a "Back to step overview" link and a "Step 1" configuration section. This section includes a "Step title" text input field, an "Activity" dropdown menu with "Select an activity" selected, and a "Step criteria" dropdown menu with "Select a dimension" selected. Below these are two more dropdown menus: one with "is" selected and another labeled "Select a value".

- Select an Activity. An activity records when a user views a page (View activity) or interacts with content (Action activity).
- Use Step criteria to specify the activity's dimension. Dimensions are attributes that can describe, filter, or group data.
- Optionally, you can configure multi-condition funnel steps. Select Add condition to specify more dimensions in a step. Additional criteria must use the same activity type. You can choose if multiple conditions are connected with an AND or an OR operator.

The screenshot shows the 'Funnel Editor' interface. At the top, there is a title 'Funnel Editor' and a right-pointing arrow. Below it is a 'Back to step overview' link with a left-pointing arrow. The main section is titled 'Step 3'. Under 'Step title', there is a text input field containing 'Add to cart'. Under 'Activity', there is a dropdown menu with 'View' selected. Below this, the 'Step criteria' section shows two conditions connected by 'and'. The first condition is 'Page Name' is 'games-cart'. The second condition is 'Page Name' is 'store-cart'. At the bottom of the criteria section, there is a red-bordered button labeled '+ Add condition'.

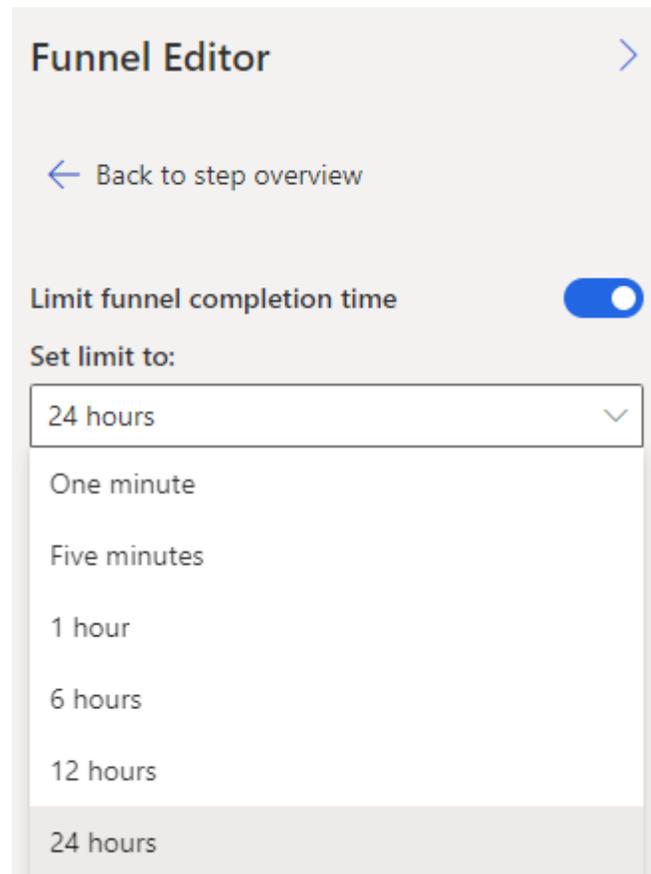
- Select Add step until you complete all the steps you want in the report.
- Select Save, name the report, and Save again.

12.2 Configure advanced settings

Funnel reports let you define a limit on the time it takes to complete a funnel. For example, you can set the time to complete the funnel to four days. This setting will only count successful subscription sign-ups that occurred within four days of a user visiting the homepage.

- Go to Funnels to open the Funnels library.

- Select a name to open the report.
- In the Funnel Editor pane, select Advanced settings.
- Set Limit funnel completion time to On.



- Choose the time the funnel must have been completed in the Set limit to dropdown list.
- Select Save to apply your changes.

12.3 Cross-channel funnel reports

Engagement insights can also collect behavioral customer data on your mobile app. Once you have instrumented your mobile app with the engagement insights Android SDK or iOS SDK, you can create cross-channel funnel reports.

12.4 Create a cross-channel funnel report

- Follow the steps to create a funnel report.
- To track how your customers are interacting with your brand across both your website and mobile app, or multiple websites, use the workspace switcher to create funnel steps with data from other workspaces. In the Funnel Editor, under Steps select which workspace the data for your funnel step should come from.

12.5 Change the date range for the funnel report

- Go to Funnels to open the Funnels library.
- Select a name to open the report.
- Open the time range and select a new time period from the list or Fixed date range to specify a date range.

12.6 Edit or delete funnel reports

- You can change the name of a funnel report, delete it, or modify the steps in the report.

12.7 Rename or delete a funnel report

- Go to Funnels to open the Funnels library.
- Select More next to the report you want to change and choose Edit name or Delete.

12.8 Edit a funnel step

- Go to Funnels to open the Funnels library.
- Select a name to open the report.
- Select the step that you want to edit.
- Select Edit.
- In the Funnel Editor, update the information you want to change.
- Select Save.

12.9 Reorder a funnel step

- Go to Funnels to open the Funnels library.
- Select a name to open the report.
- Select the step that you want to reorder.
- Select Move, and then Up, Down, To top, or To bottom, to move the step.

12.10 Delete a funnel step

- Go to Funnels to open the Funnels library.
- Select a name to open the report.
- Select the step that you want to remove and select Delete.

13. ROLES AND PERMISSIONS

A workspace is how you store and manage events and reports. A member is a user who can access a workspace. You can assign members to your workspace and define their roles and permissions. Administrator roles manage workspaces and environments and configure engagement insights for other users. The contributor roles are geared towards analysts who don't need to configure engagement insights but want to create their own reports, funnels, or segments.

13.1 Permissions

The following chart identifies permissions for each role.

Permission	Environment admin	Workspace admin	Environment contributor	Workspace contributor
Create environments (creator automatically becomes environment admin)	X*	X*	X*	X*
Configure environment (environment members, delete environment)	X			
Create workspaces	X			
Configure workspaces (workspace members, delete workspace)	X	X		
Configure events and refined events	X	X		
View workspace events and refined events	X	X		
View workspace resources (reports, segments, and metric)	X	X	X	X
Create custom reports and funnels	X	X	X	X
Create base metrics and dimensions	X	X		
Create segments	X	X	X	X

14. MANAGE ENVIRONMENTS AND WORKSPACES

A workspace is a space to store and manage events and reports. It's where you can view user activity in real time. When you create a workspace, you select the type of data to send to the workspace. Currently, web data and mobile apps are supported.

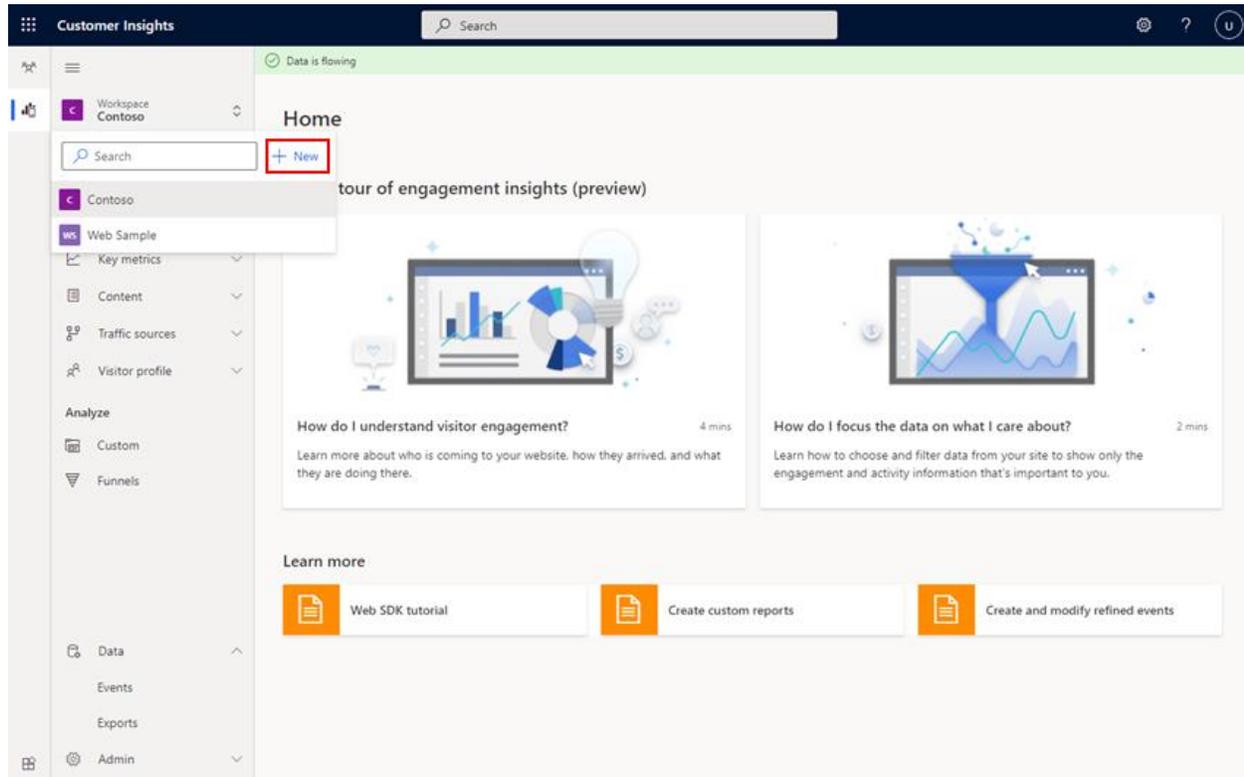
An environment is a space where you manage your workspaces and connections. How you use environments depends on your organization and your use case. For example, you can create:

- A single environment.
- Separate environments for test and production.
- Separate environments for specific teams or departments in your organization that contain relevant events for each audience.
- Separate environments for different global branches of your company.
- Connections to Customer Insights audience insights capability.

14.1 Choose an environment and create a workspace

Every workspace needs to be in an environment. You can select a pre-existing environment or make a new one when you create a workspace. Then you can choose to add workspace members and start collecting data.

- In engagement insights, select New from the workspace switcher.
- Choose an environment from the list or select Create new environment.



- Enter a name in Workspace name.
- Select the type of environment you want to create, depending on whether you want to measure what happens on a website or in a mobile app.
- You can add members and assign their permission level from the Role list. Then select Finish to create the workspace or Next to install code.
- Install the code snippet to start receiving data and then select Done.

14.2 Manage a workspace

You can maintain multiple workspaces concurrently in an environment. Your role determines how you can work in them.

- You must be an environment admin or a workspace admin to manage the workspace.
- As a workspace admin, you can rename existing workspaces or delete them.

14.3 Edit a workspace name

- Go to Admin > Workspace and select Settings.
- In the Workspace name box, enter a new name.
- Select Save to apply your changes.

14.4 Delete a workspace

Deleting a workspace will permanently remove all of its content, data, settings, and permissions. It can't be undone.

- Go to Admin > Workspace and select Settings.
- Select Delete Workspace.
- In the Delete workspace dialog, enter CONFIRM DELETE.
- Select Delete to permanently delete the workspace.

14.5 Manage workspace members

- Go to Admin > Workspace and select Members.
- Select Add members to give access and assign roles. Currently, only Workspace admin is available.
- If you set up a connection to audience insights, you can select Allow access to profile data to allow the member to see reports based on user profiles.
- Select Add members to add them to your workspace.

15. ENGAGEMENT INSIGHTS LIMITS

- Maximum event volume per workspace = 100 events per second
- Maximum number of workspaces per organization = 100

When events exceed the threshold, it can lead to loss of data in reports based on those events. You can contact support to request a volume increase before you exceed limits. We'll work with you to determine your need for a volume increase and support your request.

16. CONCLUSION

Cognitive Convergence is currently helping a handful of clients implement Dynamics 365 Customer Insights, so we can attest that it is a strong product when used in the right situations. The easiest way to mitigate these risks is to hire an independent, technology-agnostic digital transformation consulting firm such as Cognitive Convergence to help validate your software decision, prepare for implementation readiness, help manage your organizational change program, and provide quality assurance over your system integrator.