Market Insight Release Notes

2019 – February

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1. Executive Summary

This document outlines the Market Insight (MI) features that are scheduled to be released to production in February, 2019.

The key functional areas affected by this release are:

- **Salesforce.com data source**: MI can now connect to your Salesforce instance and download data without manual intervention.
- **Pattern matches in expressions**: Market Insight now supports a more flexible way of matching patterns on a single variable from a transactional table, enabling users to specify a set of patterns in order of priority
- **New measures in cubes**.
- **The transaction summary wizard is now able to flag transactions within a min-max range.**
- **Personal best aggregation in expressions.**
- **Sequence number has been added as a column to exports / data grid.**
- **Further augmentations to expressions and the output wizard.**

1.1 Target Audience

This document is intended for all users of Market Insight.

2. FEATURES

This section outlines the new features and improvements to Market Insight.

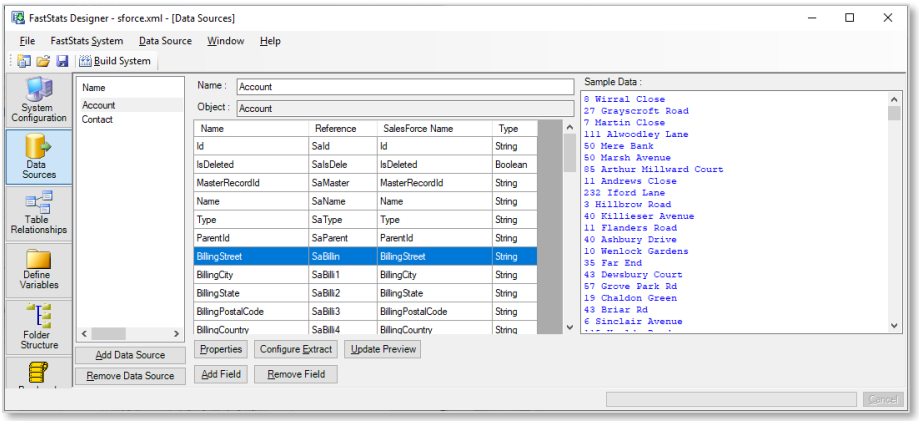
2.1 Salesforce.com data source for Market Insight

Market Insight's ETL tool can now download data from Salesforce on demand, without manual intervention.

This allows for:

- Automation of updates into Market Insight and flows of data back to the CRM/MAP
- The 'freshest' data to be used within MI, for example transactional level data can be updated to drive segmentation, or new leads can be added to review via the mapping tool for territory updates.
- Data can be refreshed daily if required, including transactions, that up to now, may be aggregated to a monthly view.

To do this it uses the Salesforce.com Bulk API to maximise performance and minimise the number of API calls to Salesforce.com. This completes the Market Insight / Salesforce loop, as Market Insight users can upload data to Salesforce via the Salesforce Wizard. Market Insight must be added as a 'Connected App' within Salesforce, and Salesforce credentials (Consumer Key and Consumer Secret) passed to the Market Insight Support team.



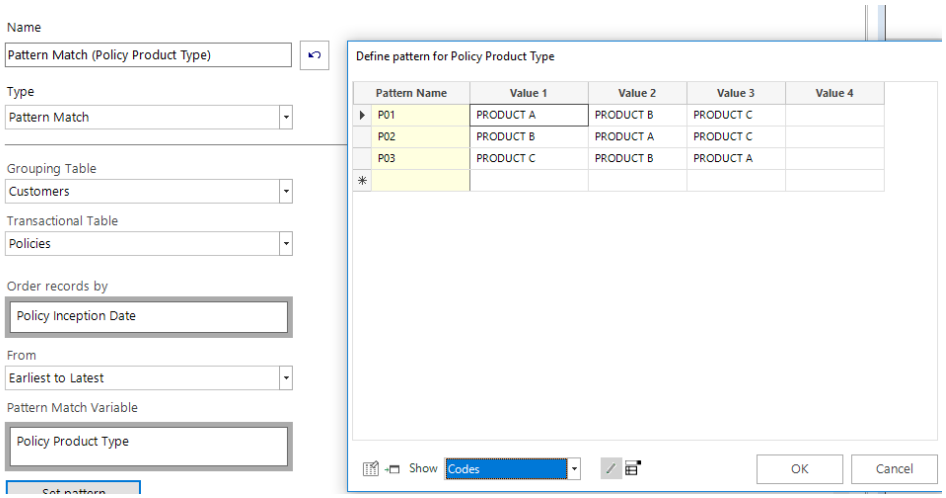
Once the appropriate settings have been made in Salesforce and credentials created and passed to the Market Insight team, the ETL tool can connect to your Salesforce instance.

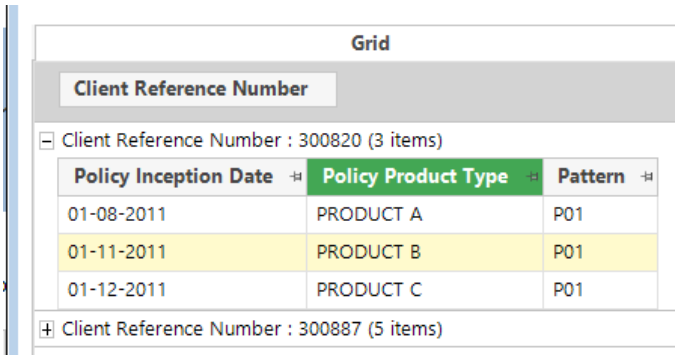
If you are interested in this integration, please contact your Market Insight representative and they can send you the relevant documentation.

2.2 Support PatternMatch on-the-fly aggregation within Expression UI

We now support a more flexible way of matching patterns on a single variable from a transactional table. In each PatternMatch aggregation, users can specify a set of patterns in order of priority. These patterns are made up of a list of codes from a selector variable on the transactional table that will occur in order, in each record, from each of the grouping table records.

A use-case on the Demo system would be to search for patterns of product types purchased for each customer. We are supporting two wildcards (? and =). The ? wildcard will match any one single value at that position in the pattern. The = wildcard will match any one value at that position in the pattern provided it is the same as the previous value found.





2.3 Two new measures in cubes

Two new measures have been added to cubes that work on selector variables. They are Count Distinct(variable) and Count Mode(variable).

CountDistinct() returns a value in this cell for the number of distinct instances of this variable found for the records in that cell (e.g. number of distinct customer types for each postcode area).

Count Mode() returns a value in this cell for the number of times the modal value has been found (e.g. how many times did records in this SIC code have the most popular customer type)

Σ Drop your variable here

Economic Region

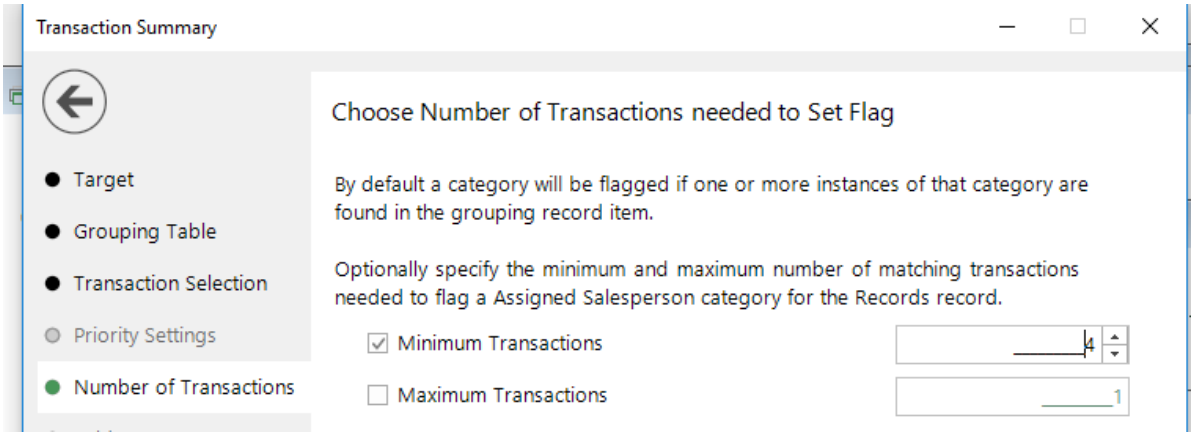
Drop your variable here

	Records	Mode(Assigned Salesperson)	Count Mode(Assigned Sales	Count Distinct(Assigned Salespe
Unclassified	3,501	51.00	7	51
North	212,971	67.00	79	10
North West (Excluding Greater Manchester)	362,680	43.00	54	11
South East (Outside M25)	1,201,492	28.00	63	28
South West	519,084	51.00	72	15
East Midlands	367,246	58.00	40	15
West Midlands	498,191	45.00	47	13
East Anglia	208,876	36.00	51	4
Yorkshire and Humberside	427,436	64.00	66	11
South East (Inside M25)	1,517,758	21.00	38	32
Scotland	427,071	62.00	94	10
Wales	235,891	52.00	57	7
Northern Ireland	120,339	14.00	51	3

2.4 Transaction summary wizard is now able to flag transactions within a min-max range

The Transaction Summary wizard takes a selector variable on the transactional table and creates a flag array on the grouping table where a value is flagged if that grouping table has an instance of that transactional value (e.g. customers have a transaction with this product code).

This extension allows the user to optionally specify a minimum and/or maximum number of transactions of that value that are required in order for the flag to be set (e.g. customers must have bought this product 4 or more times for a Yes flag).

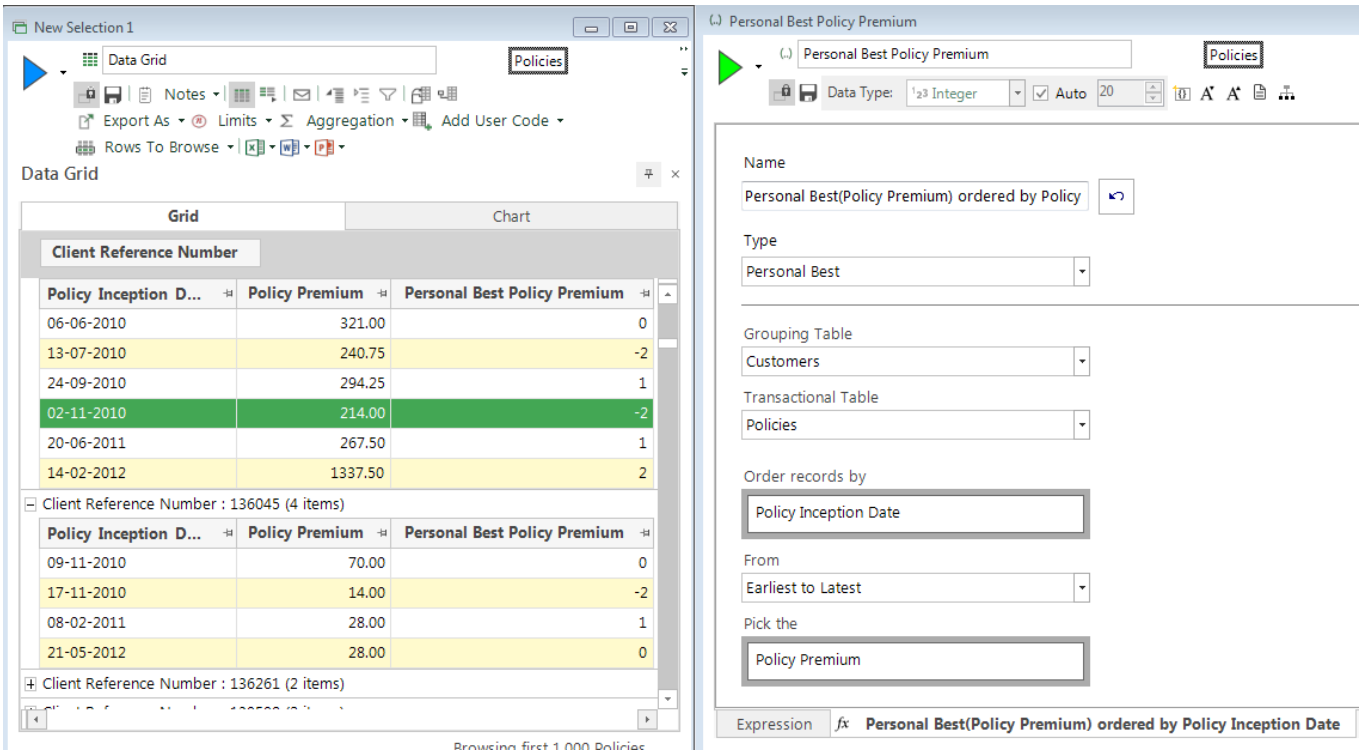


2.5 Personal Best on-the-fly aggregations are now supported within Expression UI

A new type of aggregation has been added to the on-the-fly aggregation functionality that enables easier working out of the number of times a person has broken their previous record on a numeric value.

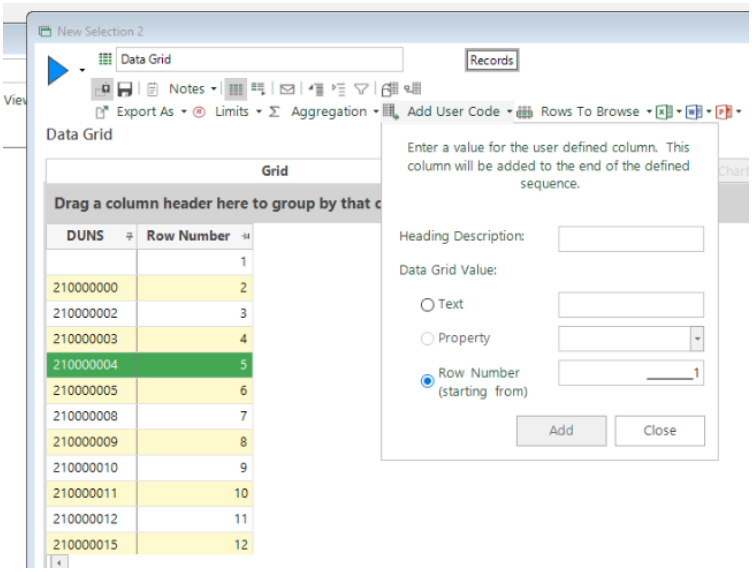
Transactions are sorted into order and a numeric value is returned for each transactional record as follows:

-2 current transaction has lowest value in sequence so far (worst so far "PW")
-1 current transaction has lower value in sequence than previous record ("worse")
0 current transaction has same value in sequence as previous record ("unchanged")
1 current transaction has higher value in sequence than previous value ("better")
2 current transaction has highest value in sequence so far (best so far "PB")



2.6 Sequence number has been added as a column to exports / data grid

An option has been added to the user code column in a data grid to quickly add a sequence number to a data grid.



2.7 Extensions to expressions

Some new additions to expressions:

a) Lookup function allows you to look up values from an external file and match to data held in the Market Insight system.

Lookup ([UK 2007 SIC Code 1-5 digit],"Public:SIC Codes wanted.txt")

b) MakeDate now supports a single numeric value parameter. This can be useful when using in conjunction with the VarInfo() function returning a date value in numeric format.

MakeDate(YYYYMMDD)

c) Nth() and NthIndex() functions now accept date parameters to enable you to pick from a list of dates. It used to only allow a pick from a list of numeric values.

2.8 Output wizard now supports rank and percentile calculated measures

Cubes that are output through the Output Wizard could not support client-side calculated measures. Some support had been added for this with a limited number of the calculated measures which had server-side equivalents in an earlier release. In this release we have extended this to include Rank() and Percentile() calculated measures as well.

3. SUPPORT

Should you have any questions or need assistance, please contact the UKCS@DNB.com team or by contacting your Customer Experience Representative.