



data courage

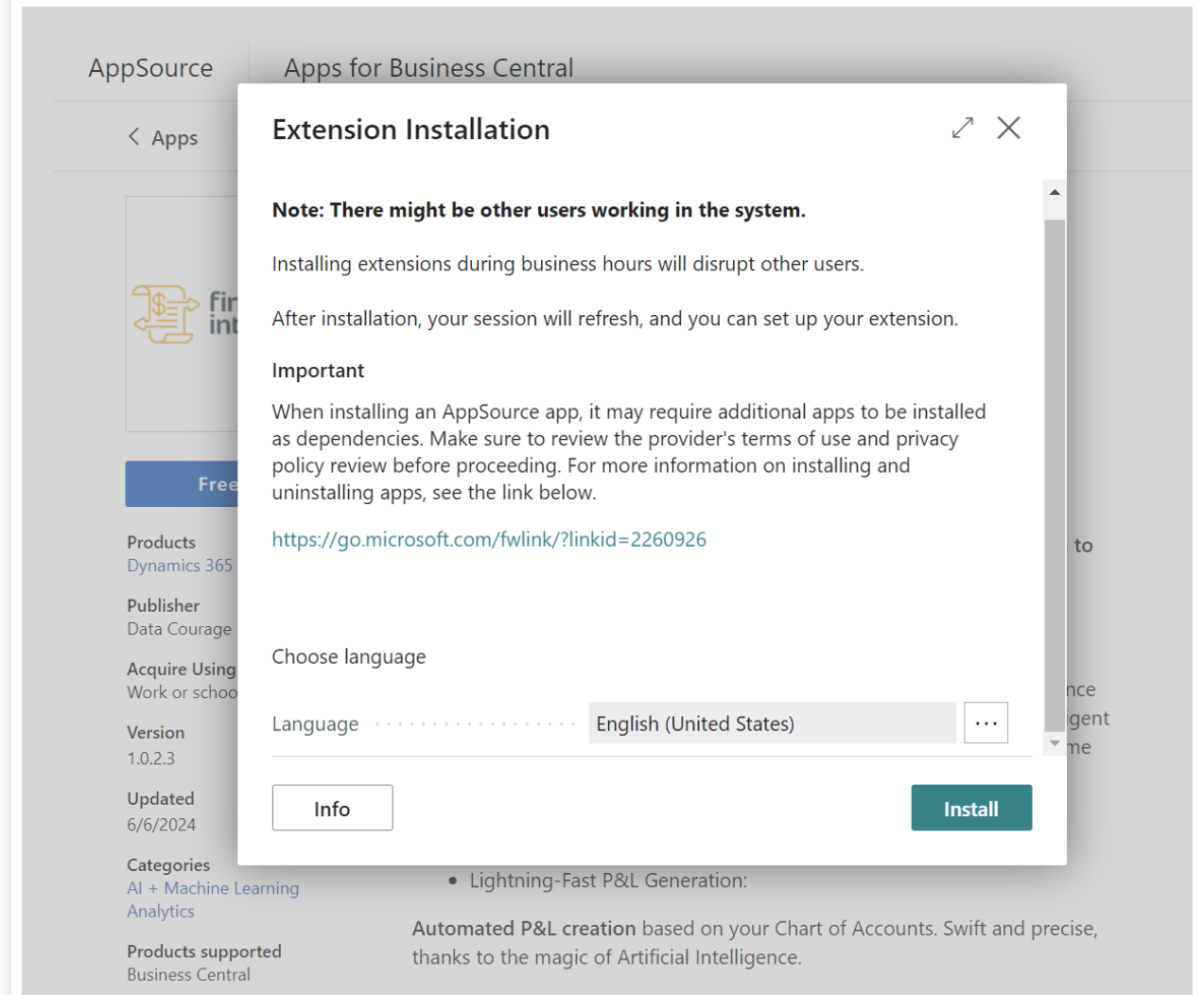
YOUR RELIABLE PARTNER IN ALL MATTERS RELATED TO DATA



**financial
intelligence^{®AI}**

Installation Steps

- **Access Extension Marketplace:**
 - Search for "AI Financial Intelligence"
- **Installation:**
 - Click "Free Trial" and follow the process
- **Language Selection:**
 - Choose the base language during installation
- **Initial Setup:**
 - Follow the pop-up instructions
- **App Initialization:**
 - Go to "Finance" then "Chart of Account", on the ribbon select "Related" and go to "Financial Intelligence Customer", there select "DataCourage CFO Assistant"
 - Alternatively, search "Financial Intelligence" select "Financial Report" to access "DataCourage CFO Assistant"



Activation Steps

- **Activate Trial:**
 - Click "Start Here" for a trial and receive 3 free tokens
- **Partner Information:**
 - Provide the company name and email to activate the license
- **App Management:**
 - Check the application status, the number of credits you have, and user information
- **Admin Tools Access:**
 - Status changes to "confirmed"; access "Admin Tools" to check your license (license type and expiration)



Financial Report

 Start Here

General

Report Template

Report Mapping Version



Financial Intelligence App Management

    Contact Support  Check Our WebSite  Admin Tools Automate  Fewer options

General

User

User ID: PBIDEMO
Tenant ID: 26671b17-65fb-46cf-8583-00bad4d87497
Tenant Domain Name: JetReportsCEE.onmicrosoft.com
Status: **confirmed**
Credits: **9997**

Extension Information

Name: AI Financial Intelligence
Version: 1.0.2.4
Update Date: 06/06/2024
Extension ID: 5402F721-4C68-44B7-9025-78F8F03EC8A1

Extension Permissions

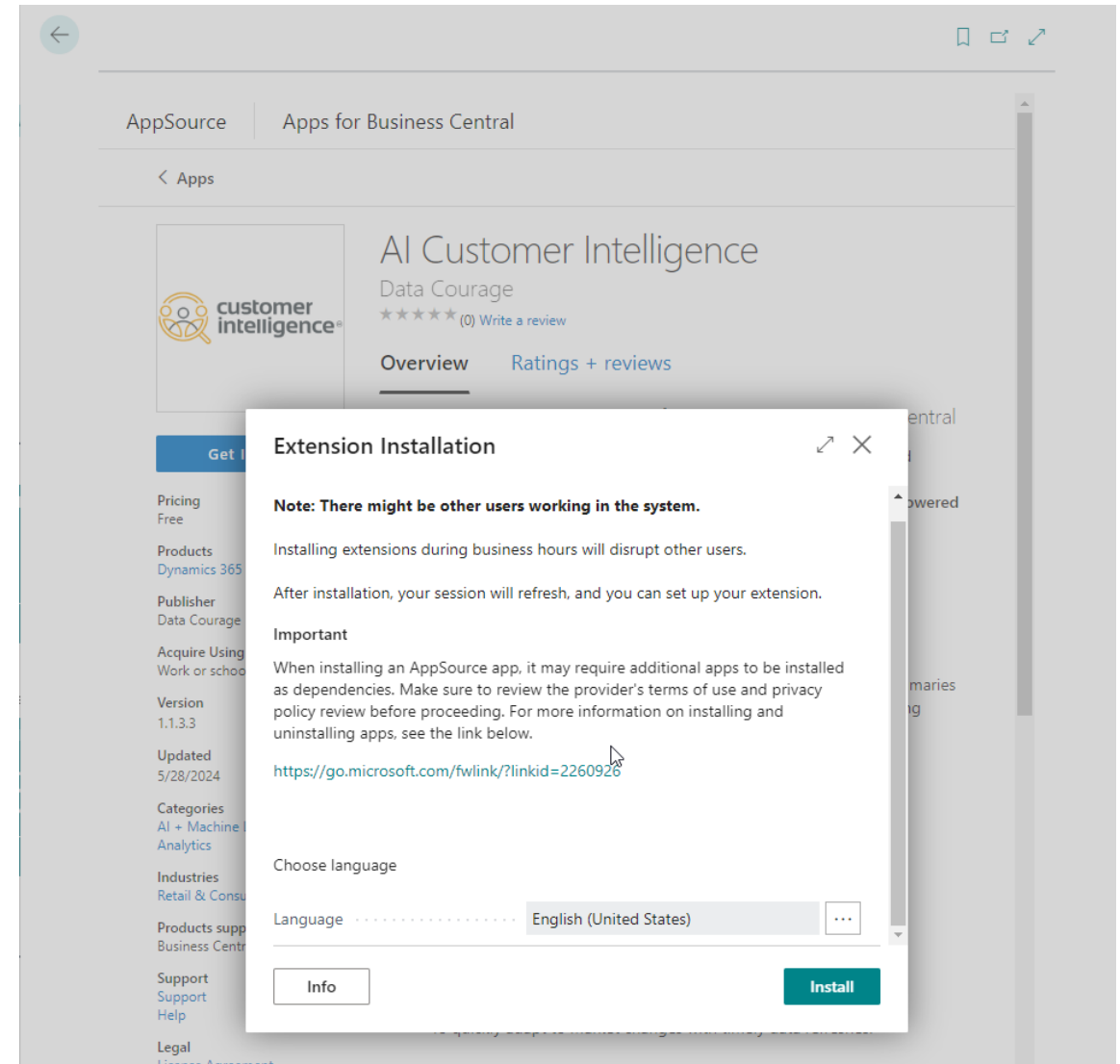
Scope ↑	App ID	Role ID ↑	Name	App Name ▼
→ System	(5402f721-4c6b-44b7-9025-78f8f03ec8a8)	FI PERMISSIONS ...	All permissions	AI Financial Intelligence



**customer
intelligence[®]**

Installation Steps

- Access Extension Marketplace:
 - Search for "AI Customer Intelligence"
- Installation:
 - Click "Get it now" and follow the process
- Language Selection:
 - Choose the base language during installation
- Initial Setup:
 - Follow the pop-up instructions (Next -> Next -> Finish)
- App Initialization:
 - Go to "Customer Intelligence App Management" in the "Actions" tab
 - Alternatively, search "customer intelligence" to access it



Activation Steps

- **App Management:**
 - Check app status, the number of credits and user information
- **Activate Trial:**
 - Click "Start Here" for a trial and receive 3 free tokens
- **Partner Information:**
 - Provide company name and email to activate the license
- **Admin Tools Access:**
 - Status changes to "confirmed"; access "Admin Tools"
- **Initialize Web Services:**
 - Go to "Admin Tools" and click "Initiate Web Services List"

 Customer Intelligence App Management

[Start Here](#) [Contact Support](#) [Our Website](#) [Admin Tools](#) [Automate](#) 

[Action Scheduler](#) [Script History](#) [Clear App Data](#) [Check your license](#) [Initiate Web Services](#)

User

User ID: PBIDEMO

Tenant ID: 26671b17-65fb-46cf-8583-00bad4d87497

Tenant Domain Name: JetReportsCEE.onmicrosoft.com

Status: **confirmed**

WebServices: **confirmed**

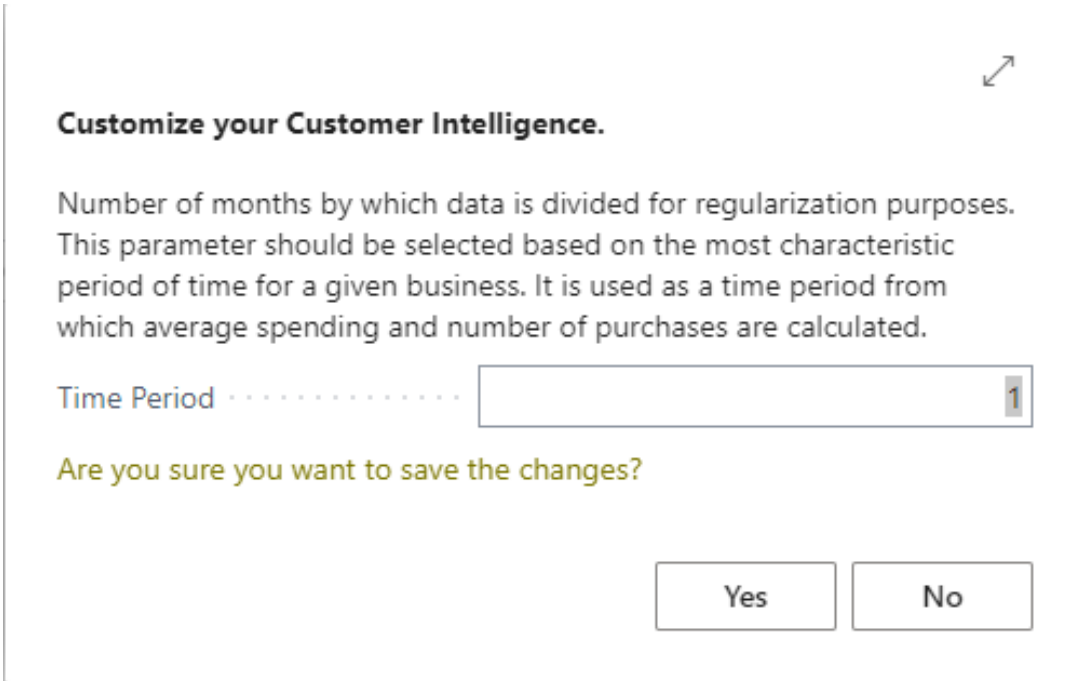
Credits: **9918**

Extension Permissions

	Scope ↑		App ID
→	System		{26671b17-65fb-46cf-8583-00bad4d87497}

Scheduler and CLV Settings

- Set Scheduler:
 - "Admin Tools" -> "Action Scheduler"
 - Set start date, frequency, and activate the scheduler
- CLV Prediction:
 - "Admin Tools" -> "Customer Intelligence Setup"
 - Specify "Time Period" for CLV prediction (e.g., 1 = 1 month, 3 = 3 months)



Customize your Customer Intelligence.

Number of months by which data is divided for regularization purposes. This parameter should be selected based on the most characteristic period of time for a given business. It is used as a time period from which average spending and number of purchases are calculated.

Time Period

Are you sure you want to save the changes?

Yes No

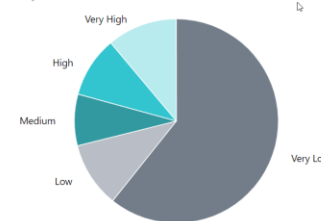
Additional Functionalities

- **Scripts History:**
 - Track classification execution times and results
- **Clear App Data:**
 - Clear application data if needed (permanent action)
- **Debug Mode:**
 - Enable for troubleshooting application errors

Running Customer Intelligence

- **Customer Intelligence Run:**
 - Execute on-demand classification via "Actions" -> "Customer Intelligence"
 - Alternatively, this action will be performed via the scheduler
- **Handling Errors:**
 - Ensure sufficient customer data (min. 5 customers and 50 transactions)
- **View Results:**
 - Insights appear on the Business Central main page
 - Change role to Business Manager if not visible

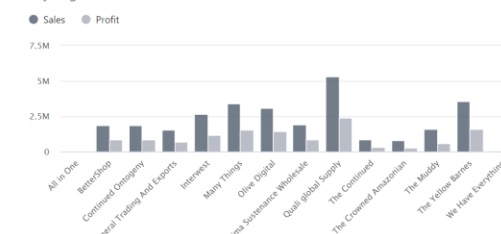
Customers Vendors Items Bank Accounts Chart of Accounts
Churn Probability



Churn Probability
Level of Churn Probability

Very Low	Low	Medium	High	Very High
82	14	11	13	15

Very High Level



Customer Intelligence

The most important group of Customer Intelligence

Clients with un... behavior	Anomalies	The best customers	One time buyers	All Customers
3	1	9	1	176
Number of groups	CLV	CompareHub		
8	787,229.36	2		

Customer Insights

- **Generate Insights:**
 - Select a customer and go to "Actions" -> "Customer Intelligence" -> "Customer Insights"
- **Token Usage:**
 - Each insight generation uses tokens
 - Purchase more tokens when needed
- **Limitations:**
 - Not available for inactive customers



Analyzing the comprehensive data on our client AllMarket's purchasing behavior and sales trends, several critical insights emerge that can significantly influence our sales strategies and customer engagement approaches. Here are the key findings and recommendations:

1. ****Outstanding Invoices and Customer Balance**:** A pressing concern is the substantial amount of unpaid invoices, totaling 38, with an off-deadline balance of \$659,727.14. This situation not only affects our cash flow but also indicates potential issues in the payment process or customer satisfaction. Immediate action is required to address these unpaid invoices, possibly through enhanced communication strategies or renegotiation of payment terms.
2. ****Late Payments Trend**:** A significant portion of invoices (39 out of 79) were paid late, with an average delay of 46 days. This pattern suggests a need for revising our credit terms or implementing stricter payment follow-ups. Offering early payment incentives could also be a strategy to encourage timelier payments.
3. ****Customer Loyalty and Purchasing Behavior**:** Despite the payment issues, AllMarket is classified within the "Loyal frequent buyers" group, with a very low churn probability and an expected purchase in the next 30 days. This indicates a strong relationship and satisfaction with our products, highlighting the importance of maintaining and nurturing this partnership. Tailoring our offerings and providing personalized engagement could further enhance this relationship.
4. ****Sales Performance and Seasonality**:** The analysis reveals significant seasonality in purchasing behavior, with the highest average sales occurring in June. This insight suggests the potential for targeted marketing campaigns and adjustments to capitalize on these peak periods. Additionally, the declining sales in August (the lowest seasonal period) present an opportunity for promotional activities to boost off-peak sales.
5. ****Product Performance and Inventory Management**:** The sales by item breakdown reveals top-performing products and those with negative revenue, indicating the need for a review of pricing strategies, cost management, and inventory levels. Focusing on high-margin products and considering the discontinuation or repricing of underperforming items could improve profitability.
6. ****Customer Engagement and Retention**:** The customer's high rating within our company suggests satisfaction with products and services. Enhancing engagement through loyalty programs, exclusive offers, and personalized communication can further solidify this relationship. Additionally, leveraging AI and data analytics for predictive purchasing patterns could lead to more tailored experiences and anticipate customer needs.

Company Information

- **Generate Info:**
 - Select a customer and go to "Actions" -> "Customer Intelligence" -> "Company Information"
- **Token Usage:**
 - Each query uses one token
- **History Records:**
 - Classification date, group assignment, and customer characteristics





**item
intelligence[®] AI**

Installation Steps

- Access Extension Marketplace:
 - Search for "AI Item Intelligence"
- Installation:
 - Click "Get it now" and follow the process
- Language Selection:
 - Choose the base language during installation
- Initial Setup:
 - Follow the pop-up instructions (Next -> Next -> Finish)
- App Initialization:
 - Go to "Item Intelligence App Management" in the "Actions" tab
 - Alternatively, search "Item intelligence" to access it

AppSource

Apps for Business Central

< Apps



Get It Now

Pricing

Free

Products

Dynamics 365 Business Central

Publisher

Data Courage

Acquire Using

Work or school account

Version

1.0.4.0

Updated

12/27/2023

Categories

AI + Machine Learning
Analytics

AI Item Intelligence

Data Courage

★★★★★ (0) [Write a review](#)

Overview

[Ratings + reviews](#)

Know Your Products - AI App for Dynamics 365 Business Central

Want to gain more insights into your product data and sales within Microsoft Dynamics 365 Business Central? AI Item Intelligence by Data Courage is the perfect solution for you!

Experience the next level of data analysis with our groundbreaking 'Item Insights' feature, powered by AI, which empowers you to make smarter, data-driven decisions like never before.

AI-Driven Item Insights: Help Unlock Hidden Opportunities

It offers a summary of sales history, evaluation of item performance, identifies trends and seasonality, and provides suggestions for sales and marketing strategies, along with short-term action recommendations.

With 'Item Insights', you can now answer crucial questions such as:

- Is it still worth selling this product?
- How can I increase sales ASAP?
- What should I focus on with my marketing efforts?

Activation Steps

- **App Management:**
 - Check app status, the number of credits and user information
- **Activate Trial:**
 - Click "Start Here" for a trial and receive 3 free tokens
- **Partner Information:**
 - Provide company name and email to activate the license
- **Admin Tools Access:**
 - Status changes to "confirmed"; access "Admin Tools"
- **Initialize Web Services:**
 - Go to "Admin Tools" and click "Initiate Web Services List"

Item Intelligence App Management

Start Here

Contact Support

Check Our WebSite

Admin Tools

More c

Item Intelligence Setup

Check your license

Initiate Web Services List

Reset Web Services List

User

User ID: PBIDEMO

Tenant ID: 26671b17-65fb-46cf-8583-00bad4d87497

Tenant Domain Name: JetReportsCEE.onmicrosoft.com

Status: confirmed

WebServices: confirmed

Credits: 9944

Extension Information

Name:

Version:

Update Date:

Extension Permissions

	Scope ↑		App ID		Role ID ↑		Name
→	System	:	{0cb8ae76-ac58-4964-b708-a2c231301fe8}		ITEM INT PERM ...		ITEM INT PERM DC

Item Intelligence Setup

- Set Scheduler:
 - "Admin Tools" -> "Item Intelligence Setup"
 - Set start date, frequency, and activate the scheduler
 - To make item classification for other historical period – change the "work date" in Business Central Settings

Item Intelligence Setup  

General

Period Length Classification range

Hide Empty Groups ☐ No. of Records

Last Update Date

Scheduler

Scheduler Start Date  Activated ☒

Frequency Job Created

My Settings - PBIDEMO  

Role 

Company 

Work Date 

Region 

Language 

Time Zone 

Notifications

Teaching Tips ☒

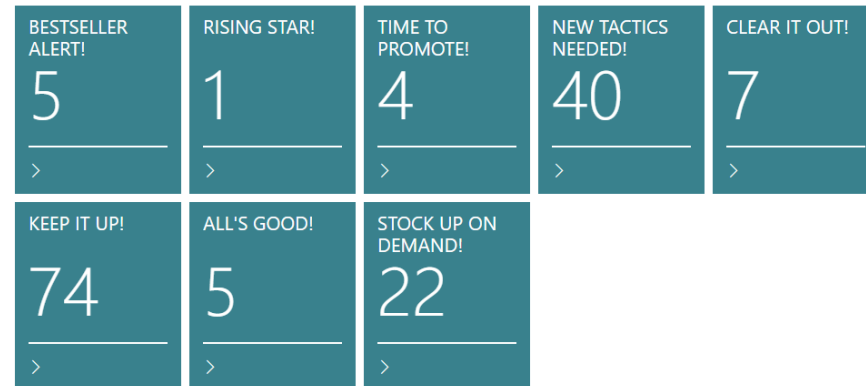
Legacy Action Bar ☐

Running Item Intelligence

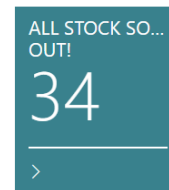
- **Item Intelligence Run:**
 - To perform on-demand classification, "Item Intelligence Setup" -> Select "Yes" in "Job Created" and then "Run once (foreground)"
 - Alternatively, this action will be performed automatically via the "Scheduler Start Date"
- **Handling Errors:**
 - Ensure sufficient item data (otherwise results may be limited)
- **View Results:**
 - Insights appear on the Business Central main page
 - Change role to Business Manager if not visible

Item Intelligence

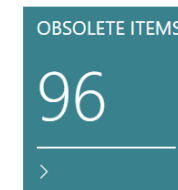
Performing Items



Recently Introduced Items



Obsolete Items



Item Insights

- **Generate Insights:**
 - Select the item analysis group tile, then select the item to generate the summary, then click "Item Insight"
- **Token Usage:**
 - Each insight generation uses tokens
 - Purchase more tokens when needed
- **History:**
 - Generated insight remains in BC along with the date of their creation
- **Limitations:**
 - Not available for inactive items



— Summary of sales history:

- The product with unique ID I1003, which is the Edifier - R1700BT Bluetooth, has been sold from 29/12/18 to 27/11/22.
- The total income from the sale of the product is 5,238,203.
- The total quantity sold is 74,851.
- The total cost of goods sold is 2,614,152.
- The total revenue made from the product is 2,624,051.
- There have been a total of 69 customers and 1,114 orders.

— Evaluation of item performance:

- The product has shown consistent sales growth over the years, with the highest sales recorded in November 2022 (94,480) and the lowest in December 2018 (0).
- The sales quantity has also increased steadily, reaching its peak in June 2022 (2,654) and its lowest point in December 2018 (0).
- The cost of goods sold and sales revenue have followed a similar trend, with the highest values in November 2022 (47,044 and 47,436, respectively) and the lowest in December 2018 (0).
- The number of customers and orders has varied throughout the years, with the highest numbers recorded in December 2019 (25 customers and 27 orders) and the lowest in December 2018 (0 customers and 0 orders).

— Recognizing and describing trends and seasonality:

- There is a clear upward trend in sales and quantity sold over the years, indicating a growing demand for the product.
- The sales and quantity sold tend to peak in the middle of the year (June and July) and towards the end of the year (November and December), suggesting a seasonality pattern.
- The cost of goods sold and sales revenue also follow a similar seasonal pattern, with higher values during the peak months.
- The number of customers and orders also show some seasonality, with higher numbers during the peak months.



Thank you!



datacourage.com



sales@datacourage.com

