

Analyze360[®] User Manual

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Introduction

This user manual serves as a comprehensive guide for users of Analyze360®, an AI-powered consumer segmentation, analytics, and lead generation platform that helps you unlock the power of segmentation to define your ideal customer, build look-alike audiences, and achieve one-to-one marketing.

By combining your existing customer or marketing lists with 3rd-party data on 220 million US consumers, you can gain advanced insights like consumer behavior, lifestyles, demographics, and trends; overcome sales barriers; cross-sell; upsell; and generate new leads in minutes.



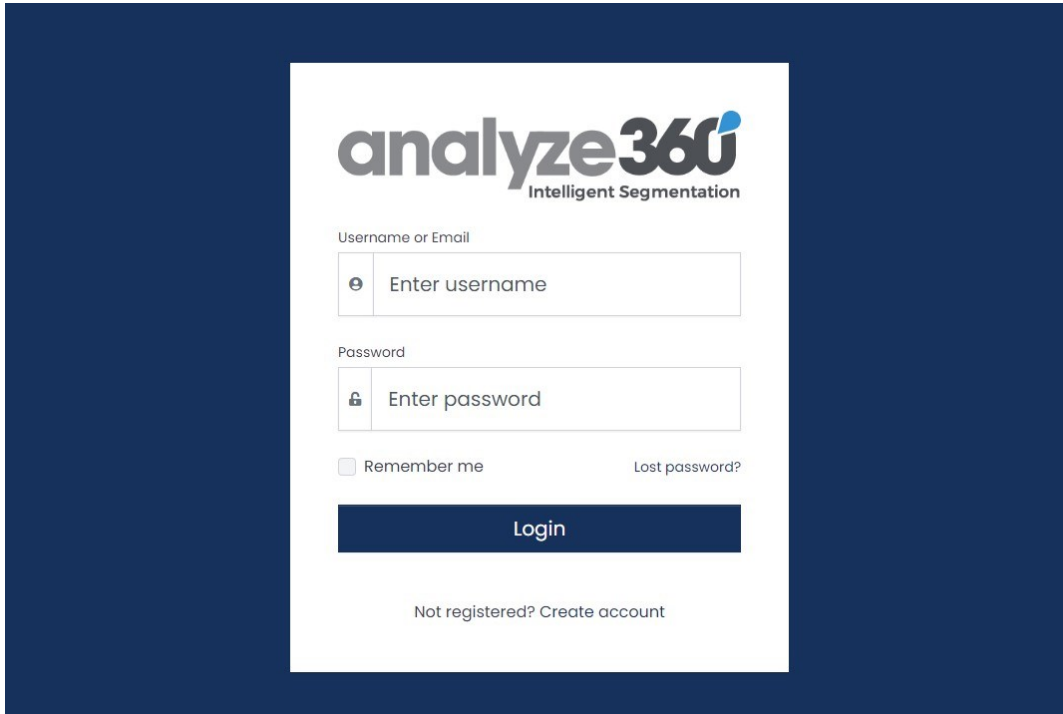
Analyze360® is user-friendly and accessible, providing advanced algorithms and analytics for customer segmentation and lead generation. It caters to businesses of any size, with users ranging from marketing professionals to data analysts and business owners. This enables advanced data analysis without requiring extensive resources, coding skills, or deep technical expertise.

This document outlines the features, functions, and capabilities of Analyze360® to assist users in using the software effectively. It is designed for both new and experienced users, with step-by-step instructions and illustrations to support your understanding.



Getting Started

Getting started with Analyze360® is easy. Simply sign up for an account on our website and log in to access the platform via <https://360-v4.analyzeclients.net/>.

The image shows a login form for Analyze360. At the top is the logo "analyze360 Intelligent Segmentation". Below it are two input fields: "Username or Email" with a placeholder "Enter username" and "Password" with a placeholder "Enter password". There is a "Remember me" checkbox and a "Lost password?" link. A dark blue "Login" button is centered below the fields. At the bottom, there is a link "Not registered? Create account".

analyze360
Intelligent Segmentation

Username or Email
Enter username

Password
Enter password

Remember me [Lost password?](#)

Login

[Not registered? Create account](#)

System Requirements for Optimum Performance

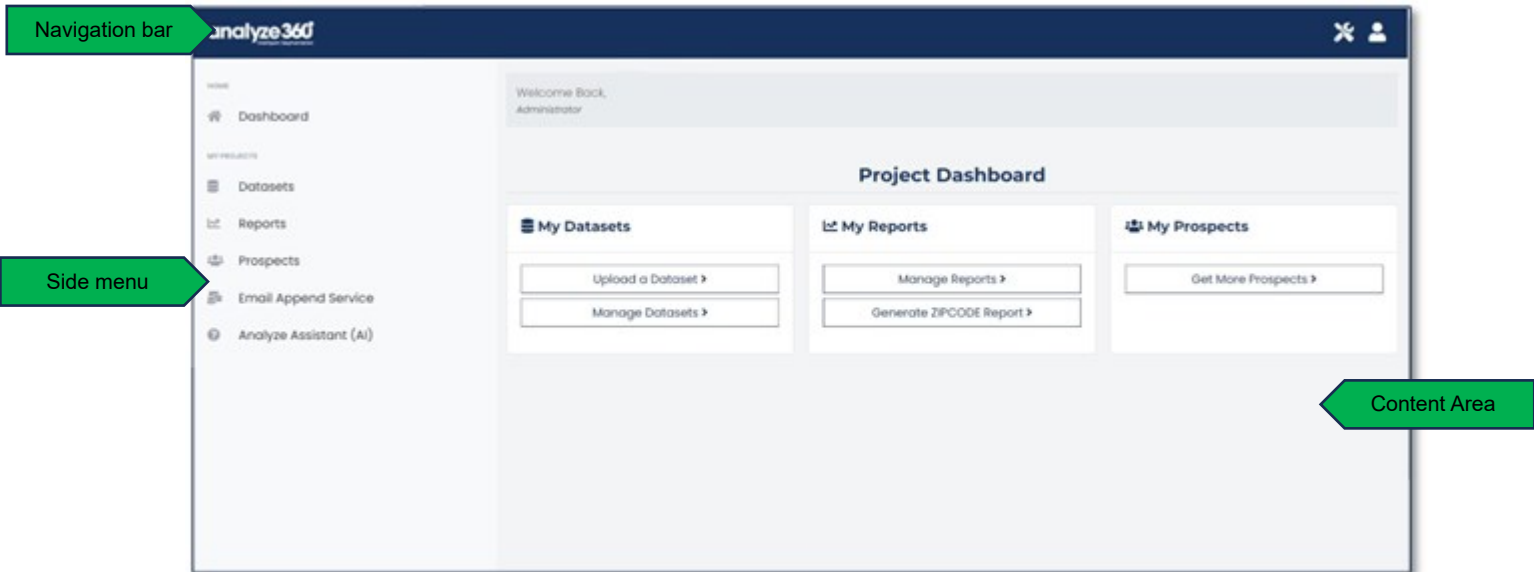
- **Internet Connection:** Stable and reliable for cloud access.
- **Web Browser:** Latest versions of browsers like Chrome, Firefox, Safari, or Edge.
- **Hardware:** Basic requirements to run a modern web browser smoothly.
- **Operating System:** Supports latest browsers (Windows, macOS, Linux, iOS, Android).
- **A Spreadsheet Program:** Excel, Google Sheets, Apple Numbers, etc. is needed to interact with .CSV Files

Once you have logged in, you will land on the dashboard where you can begin using the software.




Navigating the Platform


The Analyze360® Dashboard is your central hub for accessing and managing all the key functionalities of Analyze360®. The sections include the top **navigation bar**, the left **side menu** acting as the primary menu for project topics, and the **main content area** displaying the default project dashboard.

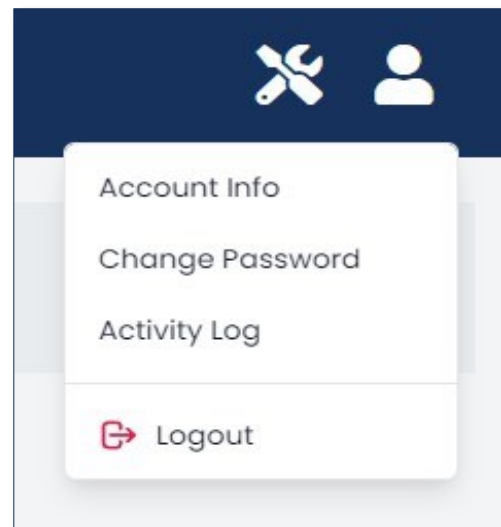


Settings and Account Information

From the top right of the navigation bar, select the:

-  **Account icon**, then a drop-down menu will open with the following options:
 - **Account Info**: View details about your user account.
 - **Change Password**: Update your account password.
 - **Activity Log**: Access a record of your account usage.
 - **Logout**: Sign out from the Analyze360™ tool.

 **Settings icon**, which may contain account-specific features and custom plugins created to expand the platform's basic functionality for unique use cases.



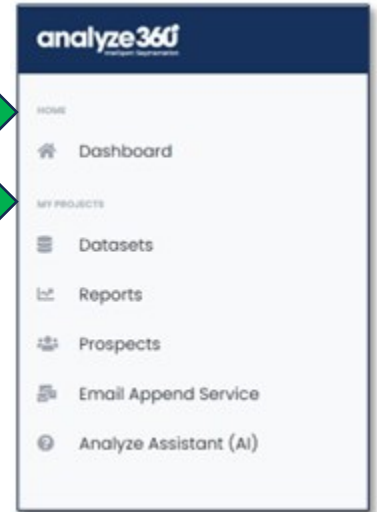
Side menu (Home)

- **Dashboard:** View the summary of your projects and activities.



Side Menu (My Projects)

- **Datasets:** Manage your data sources, upload new datasets, and organize existing datasets.
- **Reports:** Access reporting tools and manage reports, including reports based on ZIPCODE data segmentation.
- **Prospects:** Manage and analyze potential customer data; get more prospects by expanding your prospects list with additional data.
- **Email Append Service:** Enrich your datasets with additional email information.
- **Analyze Assistant (AI):** Access the AI assistant for advanced data analysis.



Each section is designed to make your data analysis as efficient and intuitive as possible. For more detailed guidance on each feature, refer to the respective sections in this manual.



Uploading and Managing Data

Tips for Data Accuracy and Quality

The accuracy and quality of your data significantly impact the results you get from Analyze360®. Incorrect or obsolete data can lead to misguided insights, affecting your business decisions. Here are some tips to ensure optimal data quality:

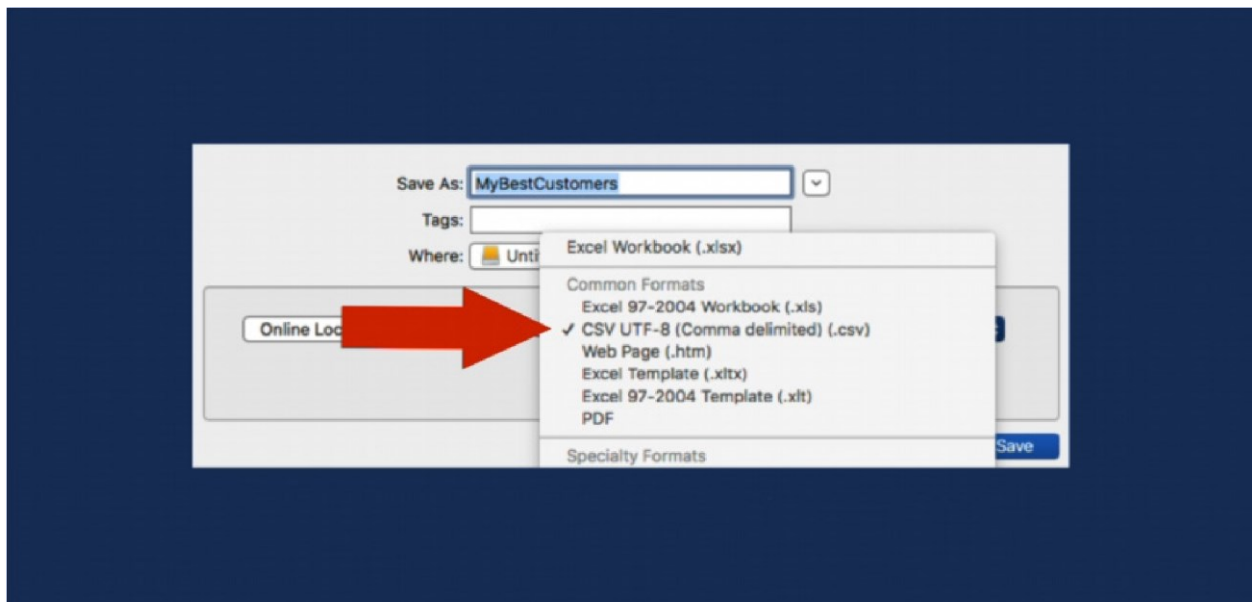
- **Data Verification:** Regularly verify your data to ensure its accuracy. This could be as simple as cross-checking your data with another reliable source or implementing data validation rules if available.
- **Consistency:** Maintain consistency in data entry. For instance, adhere to a standard format for names, addresses, and other required fields, and stick to it throughout your dataset.
- **Regular Updates:** Update your data regularly to keep it current. Outdated information can skew your analysis and lead to inaccurate results.
- **Remove Unnecessary Data:** Eliminate any unnecessary data that isn't relevant to your analysis. This will make your dataset easier to manage and speed up processing times.
- **Handle Missing Data:** If certain data is missing, consider whether it's crucial for your analysis. If it is, you might need to go back to the source and try to obtain the missing information. If this isn't possible, consider excluding that particular record from your analysis.
- **Detect and Correct Errors:** Look for any obvious errors in your data, such as typos or misplaced decimal points, and correct them. Tools like Excel's 'Find and Replace' function can be handy for this.



CSV Best Practices:

| My CSV File | | | | | | | |
|-------------|-----------|-----------------------|-------------|-------|----------|--------------|--|
| First Name | Last Name | Address | City | State | Zip Code | Telephone | Email Address |
| Lonnie | Claubaugh | 3830 Whispering Pines | Frisco | TX | 75034 | 972-377-5878 | LonnieClaubaugh@army.gov |
| Linda | Gamez | 1009 Hide-a-Way Road | Orlando | FL | 32810 | 407-965-0050 | LindaQGamez@rhyta.com |
| Yvette | Pool | 3477 Florence Street | Dorchester | TX | 75459 | 903-476-7345 | YvetteDPool@fleckens.hotmail.com |
| Micheal | Wright | 139 Progress Way | Paynesville | MN | 56362 | 320-243-6646 | MichealWWright@rhyta.com |
| Edward | Stevens | 3113 Penn Street | Kennett | MO | 63857 | 573-316-4225 | EdwardTStevens@super.com |
| Philip | Jansen | 926 Eamhardt Drive | Louisville | KY | 40223 | 502-777-2657 | philip.Jansen@army.gov |
| Oliver | Polanco | 442 Woodlawn Drive | New Berlin | WI | 53151 | 414-699-2244 | OliverFPolanco@rhyta.com |

- **Header Row:** The first row should contain the column headers, which correspond to the different data fields—First Name, Last Name, Street Address, City, State, and Zip Code.
- **Data Rows:** Each subsequent row represents a single record, with the different fields separated by commas.



- **Save as CSV:** Once your data is organized, save the file in the CSV format. In Excel or Google Sheets, you can do this by choosing 'Save As' and selecting CSV from the list of file types.



CSV Common Mistakes to Avoid:

By following these best practices, you can ensure that your data is of high quality, well-organized, and ready for analysis in Analyze360®. This will allow you to gain the most accurate insights and make informed business decisions.

- Avoid combining first and last names in the same column.
- Use unique headings for each column instead of repeating them.
- Do not merge the entire address in a single column.
- Refrain from using commas in names or addresses.
- Ensure all fields are complete and avoid leaving any blank.
- Avoid shifting cells or misaligning content.
- Use personal names instead of business names.
- Do not include sensitive information like Social Security Numbers, usernames, or passwords.

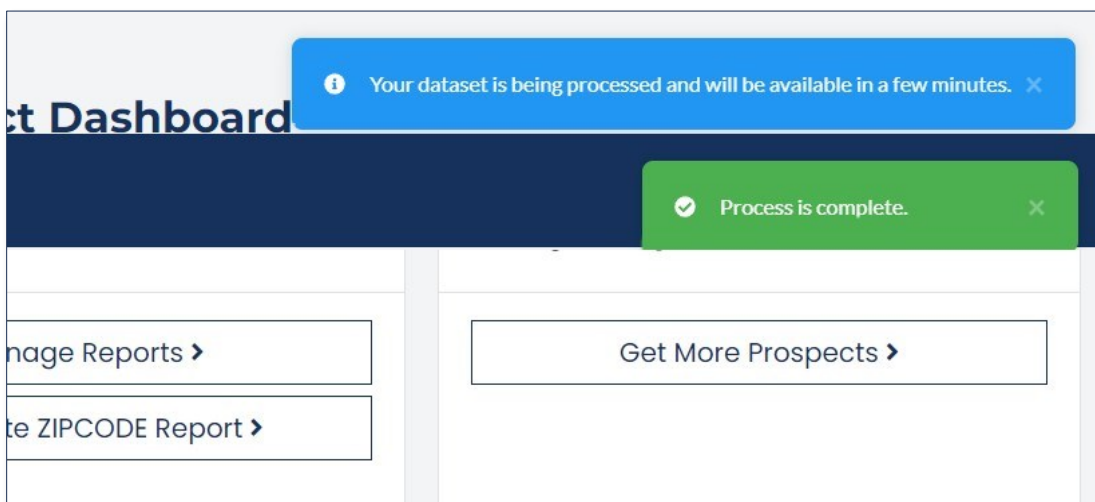
Step-by-Step Guide to Data Upload

To upload a dataset, go to the dashboard and select **Upload a Dataset**. Ensure that your upload is in CSV format. **Please note:** other formats like XLS, XLSX, and ODS are not supported.

Choose the option to "**Build summary and full sociometrics reports for this dataset**," select your file, and then select the **Upload** button.

An on-screen alert with a blue background will appear in the top-right corner of your screen, informing you that, "**Your dataset is being processed and will be available in a few minutes.**"

Another on-screen notification featuring a green background will indicate when the "**Process is complete.**"



To access your uploaded datasets, select “**Datasets**” in the left side-menu or choose “**Manage Datasets**” from your Project Dashboard. Within the Datasets window, you have the option to view, delete, or edit your dataset. Enterprise users can also share their dataset with other users in their organization.

| Datasets | | | |
|------------------|--|--|--|
| 100_For_training | | | |
| NissanLeaf2 | | | |
| Prius2 | | | |
| Tesla2 | | | |
| Volt2 | | | |

Original Upload

Select the filename to access your dataset in the default mode called “**Original Upload.**” Key features in this view include:

- **Tabs:** Navigate between “**Original Upload,**” “**Propensity Model,**” and “**Appended Consumer Data**” to access different data views or analytical models.
- **Data Table:** View customer details such as names, phone numbers, emails, and addresses, organized in a tabular format.
- **Adjustable View:** Customize the number of visible entries per page via dropdown menu.
- **Search Functionality:** Utilize the search bar to quickly locate specific entries within the database.
- **Export Option:** Download the displayed data in a CSV file format for external use or analysis.

Please handle all personal data in compliance with relevant data protection laws.



Propensity Model

The "**Propensity Model**" tab displays a predictive model that scores individuals on how closely their data correlates to the average or typical values within the dataset. The scores may be interpreted as follows:

- **OVERALL_SCORE:** This represents an aggregate measure of correlation across multiple factors, showing how closely an individual aligns with the average profile derived from the entire dataset.
- **DEM_SCORE (Demographic Score):** Reflects how closely an individual's demographic details (age, family composition, income, net worth, etc.) match the average demographic profile.
- **PSYCH_SCORE (Psychographic Score):** Indicates the degree to which an individual's psychographic characteristics, such as lifestyle or personality traits, align with the average psychographic profile in the dataset.

Such scores are often used to segment the target population and to identify individuals who are most representative of, or deviate from, the typical case. This can help in customizing marketing efforts, tailoring services, or addressing specific needs of segments that are over or under the average.

Appended Consumer Data

The "**Appended Consumer Data**" tab displays your initial dataset enriched with extensive consumer insights across hundreds of variables sourced from a database of over 220 million individuals in the US. It encompasses demographic, psychographic, and geodemographic data, along with consumer preferences, all presented in their unprocessed state.

How to Use:

1. **Access and Review:** After uploading your data, select the "**Appended Consumer Data**" tab to see your dataset enhanced with additional consumer information. This expanded view allows you to review the newly appended details for each entry.
2. **Export Data:** Use the "**Download.csv**" button to export the enriched dataset. This file is ready for external analysis or further processing in other systems.
3. **Proceed to Reporting:** Navigate to the reporting section for in-depth analysis, where you can generate insights through visualizations and other reporting tools.



Reports

Generating ZIPCODE Reports

To access different reports, navigate to "**Reports**" in the side menu or choose "**Manage Reports**" on the Project Dashboard to see current reports.

ZIPCODE report is a collection of lifestyle, summary sociometric, and full sociometric reports for a whole US zip code. You can generate a ZIPCODE report by clicking "**Generate ZIPCODE Report.**"



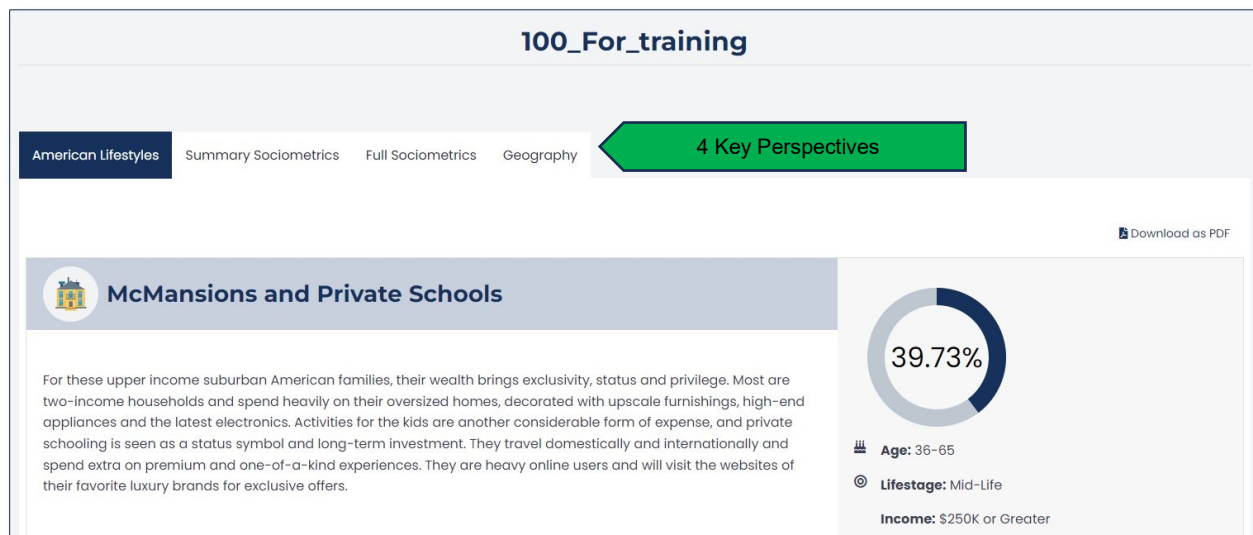
Viewing Reports

Once your data has been processed, you can access your report by going to "**Manage My Reports**" and selecting the relevant one. The report generated by Analyze360® provides four key perspectives on your data:

- **American Lifestyles:** This section groups US households into 32 categories based on factors like age, income, and household composition. Consumers grouped into a single lifestyle category tend to have similar interests and buying behavior. Lifestyle categories help identify specific segments within your audience, such as active grandparents, high net-worth seniors, or young families.
- **Summary Sociometrics:** Here, you get a comprehensive overview of your audience compared to all US households. It covers aspects like household income, net worth, credit rating, gender distribution, age demographics, ethnicity, number of children, marital status, home ownership, education, and home market value.



- **Full Sociometrics:** This section compares variables distinctive to your target audience with the Baseline. For example, if your customer list primarily consists of donors to a religious charity, religious books and items might be the most distinctive sociometric variable. It includes about 200 variables, offering detailed insights into your audience. Variables are ranked from most differentiated (your dataset vs. the baseline) to least differentiated.
- **Geography:** The final section of the report allows you to visualize your audience on a map. Each plot represents an individual or cluster in the target audience, providing valuable insights into their geographical distribution.



Get Prospects

Option 1: Create New Prospect List

In the Project Dashboard, select on “**Get More Prospects**” or select “**Prospects**” in the side menu to generate a list of potential customers (“prospects”) based on certain criteria.

1. **Select statistical model:** Choose a statistical model to define the criteria for prospect selection. The standard choice is "All US Households (use if unsure)," a broad and general model. Alternatively, the "Use a previous dataset (advanced)" option allows you to generate a prospect list that conforms to the demographic and psychographic models associated with a previously-uploaded dataset.
2. **Enter a Prospect File Name:** Enter a name for the file that will be created and saved as a ".csv" file, a format compatible with spreadsheet programs.
3. **Specify Quantity:** Specify the number of prospects you wish to generate.
4. **Choose Demographic Variables:** Narrow down their search using demographic filters like Gender, Age, Ethnicity, Income, Net Worth, and Credit Score. For each category, there is a dropdown menu presenting predefined ranges or options for selection.



- Additional Data:** Use the "Add Geographic Data" and "Add Prospect Data" buttons to further refine the prospect list with geographical information or sociometric and lifestyle variables.

The screenshot shows the 'Get Prospects' interface. At the top, there's a section for 'Select statistical model' with two radio buttons: 'All US Households (use if unsure)' (selected) and 'Use a previous dataset (advanced)'. A green callout '1. Select Statistical Model' points to this section. Below this is a 'Prospect File Name' input field with a '.csv' suffix and a 'Quantity' dropdown menu set to '100'. A green callout '2. Enter Prospect file name' points to the file name field, and another green callout '3. Specify Quantity' points to the quantity dropdown. The 'Demographic Variables' section has dropdown menus for Gender, Age, Income, Net Worth, and Credit Score. A green callout '4. Choose Demographic Variables' points to the Age dropdown. Below this are two blue buttons: 'Add Geographic Data' and 'Add Prospect Data'. A green callout '5. Additional Data' points to the 'Add Geographic Data' button. At the bottom left is a 'Generate Prospects' button.

Add Geographic Data options include:

- **Zipcode:** Enter a single zipcode to target prospects in that specific area.
- **State:** Select a state from the dropdown menu to target prospects residing within that state.
- **Point and Radius:** Enter a latitude and longitude followed by a distance in miles (lat;lon;d). This will create a circular target area with the specified radius around the point provided. For example, "34.0522; -118.2437; 10" defines a 10-mile radius around a point in Los Angeles.
- **Zipcode List:** Input a list of zipcodes separated by commas to include multiple distinct areas in the search.

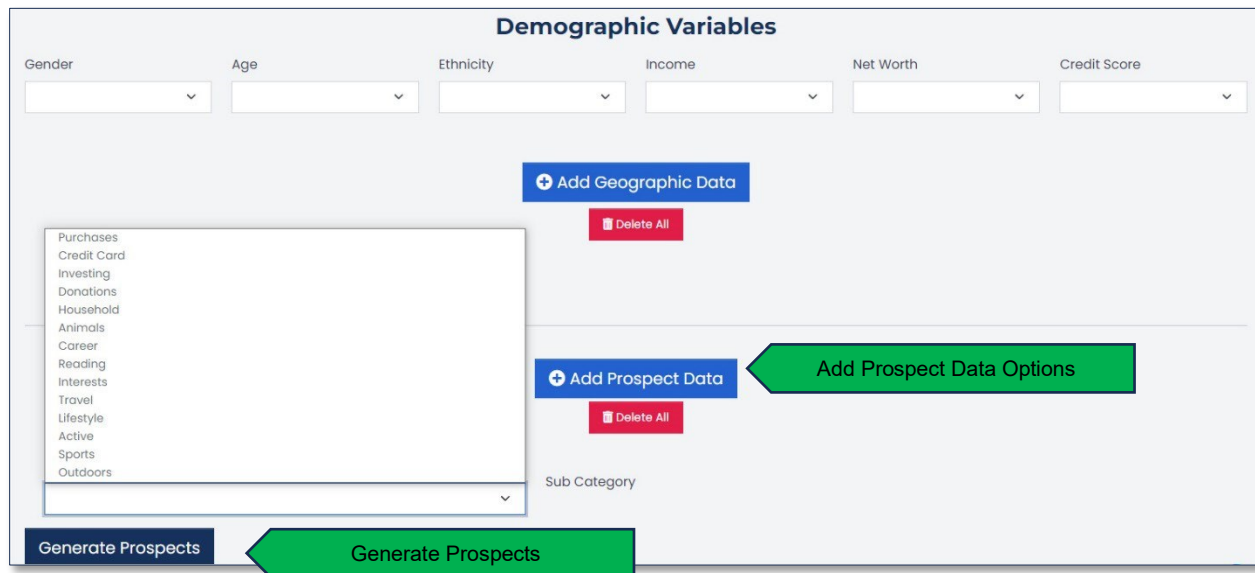
This close-up shows the 'Add Geographic Data' button's dropdown menu. The menu is open, showing options: 'Zipcode', 'State', 'Point and Radius', and 'Zipcode List'. A green callout 'Add Geographic Data Options' points to the menu. Above the menu is a 'Delete All' button. Below the menu is the 'Add Prospect Data' button. At the bottom left of the interface is the 'Generate Prospects' button.



Add Prospect Data to add more criteria that reflect the prospects' behavioral and psychographic characteristics. This can include but is not limited to:

- **Purchases:** Type of products the prospect tends to buy.
- **Credit Card:** Prospects who are likely to own or use credit cards.
- **Investing:** Individuals interested in investment opportunities.
- **Donations:** Those who have a history of donating to causes.
- **Household:** Prospects based on household size or type.
- **Animals:** Pet owners or those interested in animal-related products or services.
- **Career:** Prospects based on their professional background or industry.
- **Reading, Interests, Travel, Lifestyle, Active, Sports, Outdoors:** Prospects who have shown interest in these areas based on past purchasing data or surveys.

These additional data points allow for a highly targeted approach to prospect selection, enabling businesses to tailor their marketing strategies to specific interests and behaviors, significantly increasing the chances of conversion.



Select the Generate Prospects once all desired criteria have been selected and any additional demographic or geographic data have been added. This action will process the input data against the statistical model and produce a .csv file containing a list of prospects that match the defined parameters. The generated file can be used in various CRM systems or for direct marketing efforts.



Option 2: Use Analyze Assistant (AI)

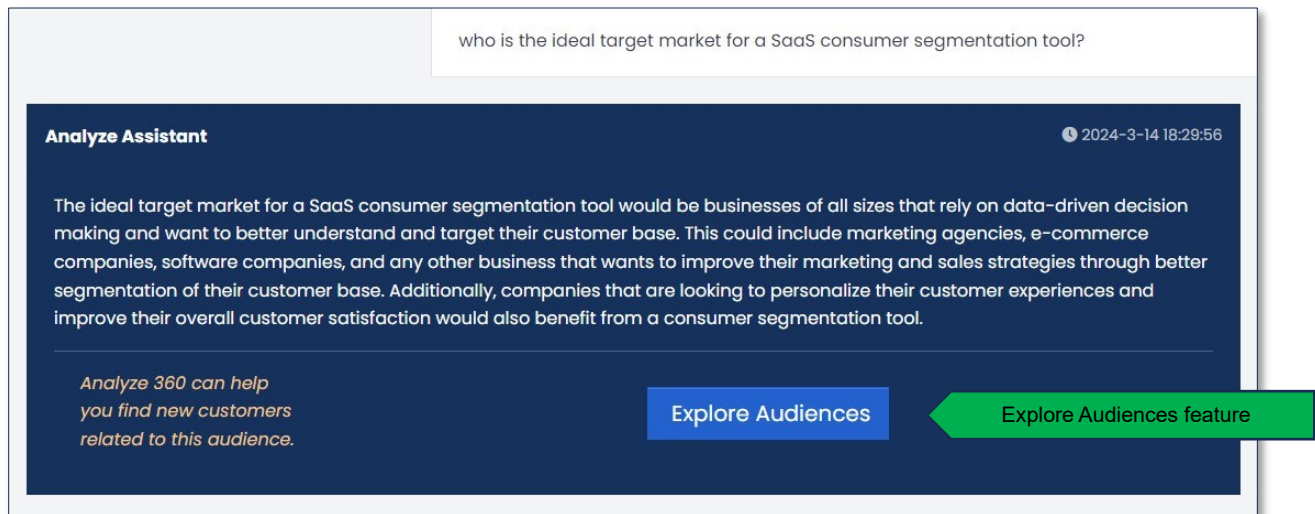
We're thrilled to announce a recent feature addition to Analyze360®—our new AI-powered Analyze Assistant! This innovative tool will transform your data-driven decision-making process, particularly when you're starting without an initial list to upload.

To get started, simply log into your Analyze360® platform, select the 'Analyze Assistant (AI)' option from the sidebar, and engage with the AI through a conversational interface. Follow the prompts to ask your questions, and once you're ready to build a new prospect list from the insights gathered, click on "Explore Audience" to proceed.

Key features include:

- **Interactive User Experience:** Engage with the AI Assistant through a conversational interface for prompt answers to your inquiries.
- **Data-Driven Analysis:** Translate extensive market data into practical insights customized to suit your particular requirements.
- **Tailored Prospect Lists:** Receive personalized prospect lists based on consumer variables to target your audience effectively.
- **Strategic Decision Support:** Refine your customer and prospect insights to elevate your marketing strategies and campaigns.

The Analyze Assistant is your go-to solution for advanced market analysis and strategic decision-making. Stay ahead of the competition and unlock the power of AI in your marketing efforts.



The **Explore Audiences** feature allows you to compile a targeted list of potential customers by selecting from a range of criteria that match your business needs. It leverages the Analyze Assistant to suggest variables based on your input, enabling more focused prospecting.



How to Use:

1. **Select Statistical Model:** Choose "All US Households" for a general model, or select "Use a previous dataset" for a more targeted approach based on advanced, specific criteria.
2. **Enter Prospect File Name:** The name for your .csv file where the list of prospects will be saved.
3. **Specify the Quantity:** Determine the number of prospects you wish to generate.
4. **Select Analyze Assistant Variables:** Mark the checkboxes next to the variables that best fit your ideal customer profile. These options were recommended based on your previous interactions with the Analyze Assistant.
5. **Select Demographic Variables:** Refine your prospects by selecting criteria such as Gender, Age, Ethnicity, Income, Net Worth, and Credit Score.
6. **Add Geographic Data:** Optionally, include geographical segmentation to your criteria for a more localized prospect list. See "Get Prospects," above, for more detail about these options.
7. **Add Prospect Data** for additional targeting options, include sociometric and lifestyle variables.
8. Once you have set your parameters, **Generate Prospects** to create your prospect list.

The screenshot shows the 'Get Prospects' web interface. At the top, there is a title 'Get Prospects' and a descriptive paragraph. Below this, the 'Select statistical model' section has two radio buttons: 'All US Households (use if unsure)' (selected) and 'Use a previous dataset (advanced)'. A green callout '1. Select Statistical Model' points to this section. The 'File Name' input field is followed by a '.csv' suffix and a note 'All US Households selected'. A green callout '2. Enter Prospect file name' points to the input field. The 'Quantity' dropdown menu is set to '100'. A green callout '3. Specify Quantity' points to this dropdown. The 'Analyze Assistant Selected Variables' section contains a list of checkboxes for various consumer behaviors. A green callout '5. Additional Data' points to this section. The 'Demographic Variables' section includes dropdown menus for Gender, Age, Ethnicity, Income, Net Worth, and Credit Score. A green callout '4. Choose Demographic Variables' points to this section. At the bottom, there are buttons for 'Add Geographic Data', 'Add Prospect Data', and 'Generate Prospects'.

Note: For best results, limit your selection to the most relevant variables. You can further refine your list by adding geographical data to target prospects in specific location.



Email Append Service

The Email Append Lookup service is designed to enhance your customer database by adding missing email addresses. This tool uses credits for appending emails, which are deducted per lookup request.

Please note that each lookup request consumes email append credits from your account. The service notifies you of the remaining credits and provides a link to purchase more if needed. You will not be able to perform email appends until you purchase credits.

How to Use:

1. Select a data set by choosing **“Select Existing Dataset”** if you want to work with a dataset previously uploaded to the system or use **“Upload New File”** to add a new dataset for the email append process.
2. **If selecting an existing dataset**, use the “Select Existing Dataset” dropdown to choose the one you wish to append emails to, then define the increment in which the tool will search for email addresses (typically in batches of 100).
3. **Next Select “Generate Appended Email List”** to start the appending process. The application will match and append email lists based on the filename and selected range.
4. Once the process is complete, you can access the updated files in the **“Completed Email Appended Files”** section.

Email Append Lookup

PLEASE NOTE: You have 1000 email append credits left. [Click Here to purchase more.](#)

The email append tool pulls email addresses in increments of 100, per lookup request. The application will attempt to match append email lists with select datasets or uploaded files, based on filename and selected range.

Select Existing Dataset
Upload New File

➔ 1. select existing or upload new dataset

Select Dataset▼

Generate Appended Email List
➔ 2. Generate Appended Email List

Completed Email Appended Files

Notes: Make sure you have enough credits before initiating the email append process. It’s recommended to verify the emails after the append process is completed.



Troubleshooting:

If you're experiencing issues using the Email Append Service on the Analyze360® platform, here are some troubleshooting tips:

- **CSV File Format:** Ensure that your CSV file is formatted correctly. The required fields are First Name (FN), Last Name (LN), Address, City, State, and Zip. Missing any of these fields could cause an unsuccessful upload. Refer to the specific CSV requirements detailed on the Analyze360® website, via <https://www.analyzecorp.com/resources/tools/>.
- **CSV File Validation:** Before uploading, validate your CSV file to ensure it adheres to the platform's CSV rules, such as correct delimiters, no extra spaces, and proper encoding. There are online CSV validation tools that can help with this.
- **Contact Support:** If problems persist after you've taken these steps, reach out to Analyze360® support for assistance. Provide them with details of the issues you're facing and any error messages you've received for a more efficient resolution.

Remember, accurate and correctly formatted data is key for the Email Append Service to function properly. Always follow the detailed guidelines provided by Analyze360® for the best results.



Resources

Need more help? Visit our website to get the helpful tools listed below:

- [Data Dictionary](#) - Download technical information about each of our 360 consumer insights.
- [CSV File tips](#) – Download tips to help you setup your CSV file.
- [360 Lifestyles](#) – Download our guide to consumer lifestyles segments and audiences.

We also have several videos to help you get started!

Have more questions? Ask at info@analyzecorp.com

