

AI Sentiment Analyzer for Creatio

User Guide

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1 AI Email Sentiment Analyzer

1.1 Overview

Sentiment analysis is the process of detecting the emotional tone or attitude of a text, such as positive, negative, neutral, or mixed. By using sentiment analysis on email content, one can gain insights into the feelings and opinions of the email senders or recipients, and use them for various purposes, such as customer feedback, customer service, etc.

Users can select either OpenAI or Azure AI solutions for the above activity from the provided options.

In Creatio, you can find the customer's sentiment in Cases, Contact and Cases.

1.2 Business Use Case

1.2.1 Background

A medium-sized e-commerce company with a substantial customer base receives hundreds of customer support emails daily. They are committed to providing excellent customer service but struggle to efficiently identify and prioritize urgent issues and gauge customer satisfaction.

1.2.2 Problem:

- The customer support team is overwhelmed by the sheer volume of incoming emails, making it challenging to respond promptly to critical issues.
- Customer satisfaction is inconsistent, and the company wants to identify areas for improvement in its support processes.
- There is no systematic way to measure customer sentiment and identify potential product or service issues.

1.2.3 Solution:

Implement an AI Email Sentiment Analyzer to analyze the sentiment of customer support emails and improve the overall customer support experience.

1.2.4 Implementation Steps:

- Integrate the AI Email Sentiment Analyzer into the company's email management system.
- As emails arrive, the system automatically analyzes their sentiment and assigns a sentiment score (e.g., positive, mixed, negative, neutral).
- Based on the sentiment score, emails are automatically prioritized:
- Negative sentiment emails are flagged as high-priority and assigned to specialized support agents for immediate attention.
- Positive sentiment emails for feedback and performance recognition are noted.
- Continuously monitor the performance of the Email Sentiment Analyzer. Fine-tune the model and add new sentiments if necessary.

1.3 Solution Benefits

The following points explain how the email sentiment analyzer is beneficial:

- **Improved Response Time:** Urgent customer issues are quickly identified and addressed, leading to higher customer satisfaction and loyalty.
- **Enhanced Customer Satisfaction:** By responding to negative sentiment emails promptly, the company can turn unhappy customers into satisfied ones, potentially reducing churn.
- **Feedback Loop:** The company can use feedback from positive sentiment emails to recognize and reward exceptional customer support agents, boosting employee morale.
- **Data-Driven Insights:** Over time, the company gains insights into common customer pain points and areas where improvements are needed in their products or services.
- **Resource Optimization:** By automating sentiment analysis and prioritization, the company can allocate support resources more efficiently, reducing operational costs.
- **Competitive Advantage:** Consistently providing exceptional customer support can differentiate the company from competitors, leading to increased market share.

1.4 Sentiment Types

The Sentiment analysis can display the following types of sentiments based on the text input:

1.4.1 Positive

The text expresses a favorable or optimistic attitude towards a person, thing, or situation. For example, "I love this product, it works great!"

1.4.2 Negative

The text expresses an unfavorable or pessimistic attitude towards a person, thing, or situation. For example, "This product is terrible, it broke after one use!"

1.4.3 Mixed

The text expresses a lack of emotion or opinion towards a person, thing, or situation. For example, "This product is okay; it does what it says."

1.4.4 Neutral

The text presents a neutral stance, conveying an absence of strong emotion or opinion regarding a person, thing, or situation. For instance, "I find this product to be neutral; it performs as expected."

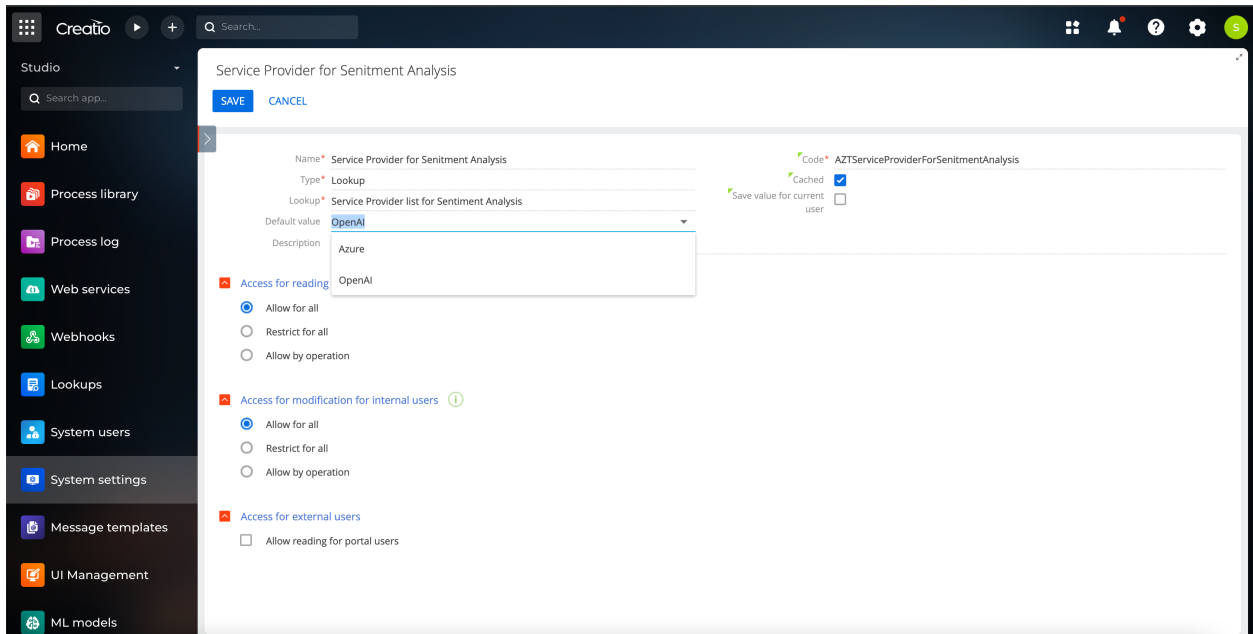
2 Prerequisites for OpenAI

2.1 OpenAI Key Setting

To configure the **OpenAI Email Sentiment Analysis**:

Click the **Settings** icon.

In the System Settings page, search for the name " **Service Provider for Sentiment Analysis** " and select " **OpenAI** " from the dropdown in the default value field.



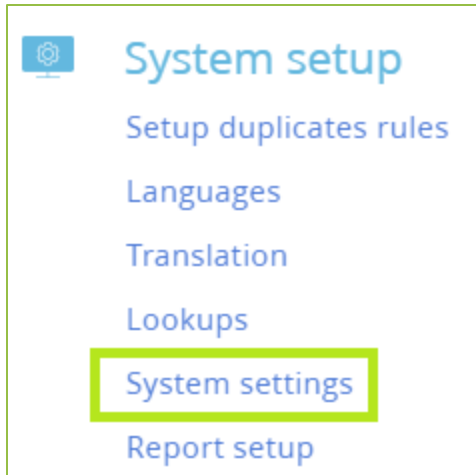
To configure OpenAI key, do the following:

1. Click the **Settings** icon.



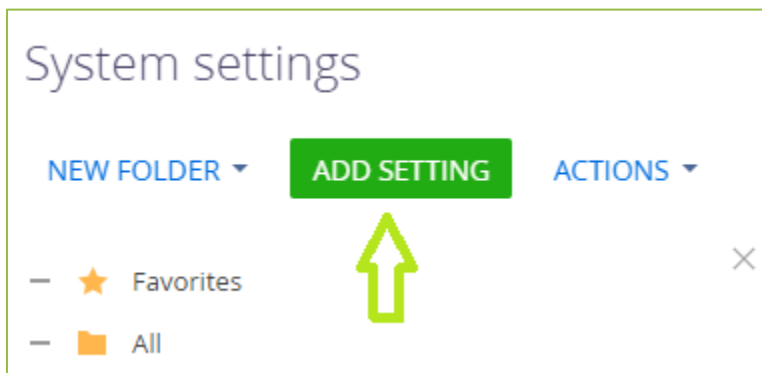
The Settings page appears.

2. Under **System setup**, click **System settings**.

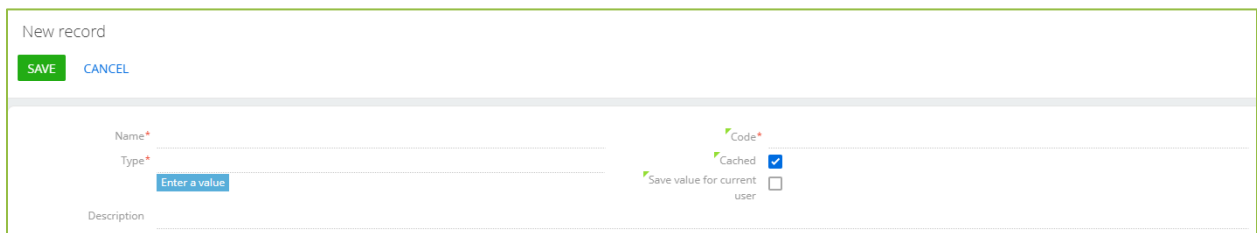


The System settings page appears.

3. Click **ADD SETTING**.

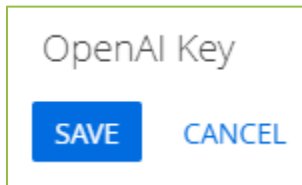


The New record page appears.



4. Do the following:
 - a. In the **Name** box, enter **OpenAI Edit Model**.
 - b. In the **Type** box, enter **Text**.
 - c. In the **Default value** box, enter **text-davinci-edit-001**.
 - d. In the **Description** box, enter **Bearer** as prefix and **“Your API Key goes here”**.

- e. In the **Code** box, enter **OpenAPEditModel**.
5. Click **Save**.



2.2 OpenAI Edit Model

1. To configure OpenAI Edit Model, follow the steps in Section 2.1 until 3 and do the following:
 - a. In the **Name** box, enter **OpenAI Edit Model**.
 - b. In the **Type** box, enter **Text**.
 - c. In the **Default value** box, enter **text-davinci-edit-001**.
 - d. In the **Code** box, enter **OpenAPEditModel**.
2. Click **Save**.

2.3 OpenAI Embedding Model

1. To configure OpenAI Embedding Model, follow the steps in Section 2.1 until 3 and do the following:
 - a. In the **Name** box, enter **OpenAI Embedding Model**.
 - b. In the **Type** box, enter **Text**.
 - c. In the **Default value** box, enter **text-embedding-ada-002**.
 - d. In the **Code** box, enter **OpenAIEmbeddingModel**.
2. Click **Save**.

2.4 OpenAIMaxToken

1. To configure OpenAI Embedding Model, follow the steps in Section 2.1 until 3 and do the following:
 - a. In the **Name** box, enter **OpenAIMaxToken**.
 - b. In the **Type** box, enter **Integer**.
 - c. In the **Default value** box, enter **7**.
 - d. In the **Code** box, enter **AZTOpenAIMaxToken**.

2. Click **Save**.

2.5 OpenAI Chat Model

1. To configure OpenAI Embedding Model, follow the steps in Section 2.1 until 3 and do the following:
 - a. In the **Name** box, enter **OpenAI Chat Model**.
 - b. In the **Type** box, enter **Text**.
 - c. In the **Default value** box, enter **gpt-3.5-turbo**.
 - d. In the **Code** box, enter **OpenAIChatModel**.
2. Click **Save**.

2.6 OpenAI Chat Completion Prompt

1. To configure OpenAI Chat Completion Prompt, follow the steps in Section 2.1 until 3 and do the following:
 - a. In the **Name** box, enter **OpenAI Chat Completion Prompt**.
 - b. In the **Type** box, enter **Unlimited length text**.
 - c. In the **Default value** box, enter **“You are an email parsing bot. When provided with either a single email content or with a complete email chain. You will perform a single step. Step 1. You will parse to retrieve the latest email content in the input provided.”**
 - d. In the **Code** box, enter **AZTChatCompelctionPrompt**.
2. Click **Save**.

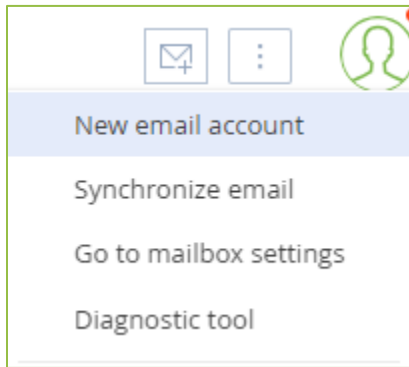
2.7 OpenAI Create Model

1. To configure OpenAI Create Model, follow the steps in Section 2.1 until 3 and do the following:
 - a. In the **Name** box, enter **OpenAI Create Model**.
 - b. In the **Type** box, enter **Text**.
 - c. In the **Default value** box, enter **text-davinci-003**.
 - d. In the **Code** box, enter **OpenAICreateModel**.
2. Click **Save**.

2.8 Configuring Mailbox

To configure mailbox, do the following:

1. Click **Email** icon in the right navigation pane.
2. In the top-right corner, click the vertical three dots Icon, and then click **New email account**.



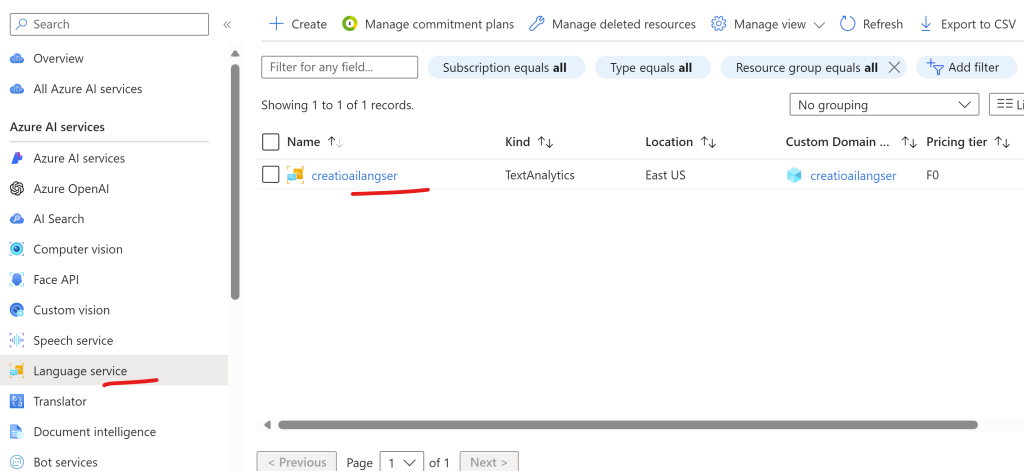
The New email account box appears.

3. In the given box, enter your email ID and click **Next** and follow the instructions to configure your new email account.

3 Prerequisites for Azure

3.1 Azure AI Subscription Key and Service Endpoint Setting

To set up **Azure AI Email Sentiment Analysis** in Creatio, you must enter the Azure AI subscription key and service endpoint. To obtain these values, ensure you have a valid subscription key and service endpoint obtained through your company's [Azure Portal](#) account. To acquire them, follow these steps: navigate to [Azure Portal](#) -> "Azure AI Services" -> "Language Service" -> create a custom domain -> open the created custom domain -> select "Keys & Endpoints" to retrieve the Key, Region, and endpoint



Search

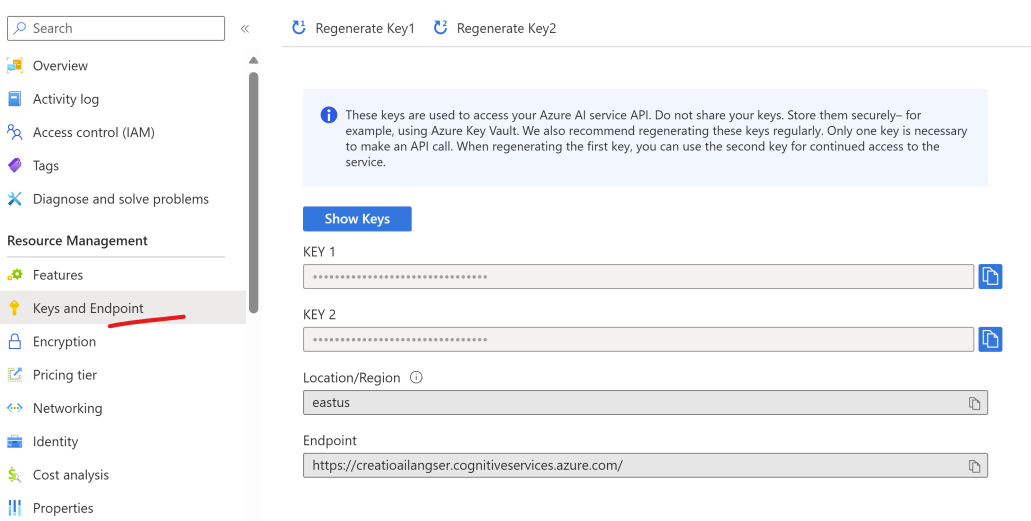
+ Create Manage commitment plans Manage deleted resources Manage view Refresh Export to CSV

Filter for any field... Subscription equals all Type equals all Resource group equals all Add filter

Showing 1 to 1 of 1 records. No grouping

Name	Kind	Location	Custom Domain	Pricing tier
creatioailangser	TextAnalytics	East US	creatioailangser	F0

< Previous Page 1 of 1 Next >



Search

Regenerate Key1 Regenerate Key2

Overview Activity log Access control (IAM) Tags Diagnose and solve problems

Resource Management Features Keys and Endpoint Encryption Pricing tier Networking Identity Cost analysis Properties

These keys are used to access your Azure AI service API. Do not share your keys. Store them securely-- for example, using Azure Key Vault. We also recommend regenerating these keys regularly. Only one key is necessary to make an API call. When regenerating the first key, you can use the second key for continued access to the service.

Show Keys

KEY 1

KEY 2

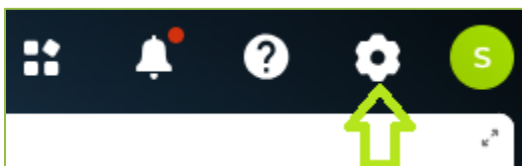
Location/Region eastus

Endpoint https://creatioailangser.cognitiveservices.azure.com/

3.2 Setting up the Subscription Key and Region in Creatio

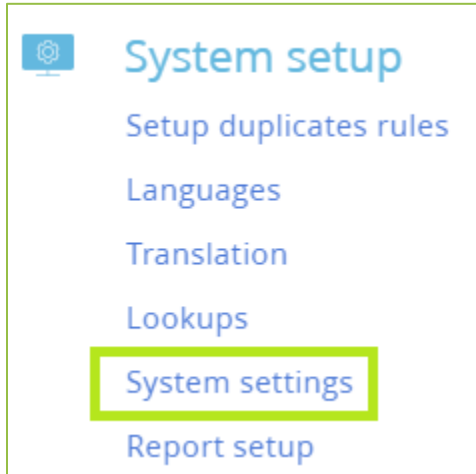
To configure subscription key and region, do the following:

4. Click the **Settings** icon in creatio:



The Settings page appears.

- Under **System setup**, click **System settings**.



The System Settings page will appear. Search for the name "**Ocp-Apim-Subscription-Key**" and enter the subscription key in the default value field.

To specify the region, search for the name "**Subscription-Region**" in the System Settings and enter the region obtained from the Azure portal as the default value.

3.3 Select for **Service Provider for Sentiment Analysis in System Settings**

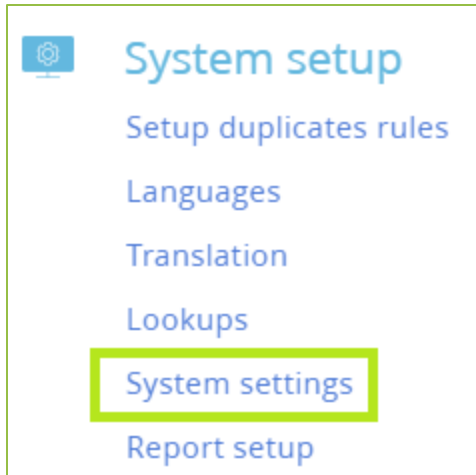
To select the **Service Provider for Sentiment Analysis in System Settings**, do the following:

- Click the **Settings** icon in creatio:

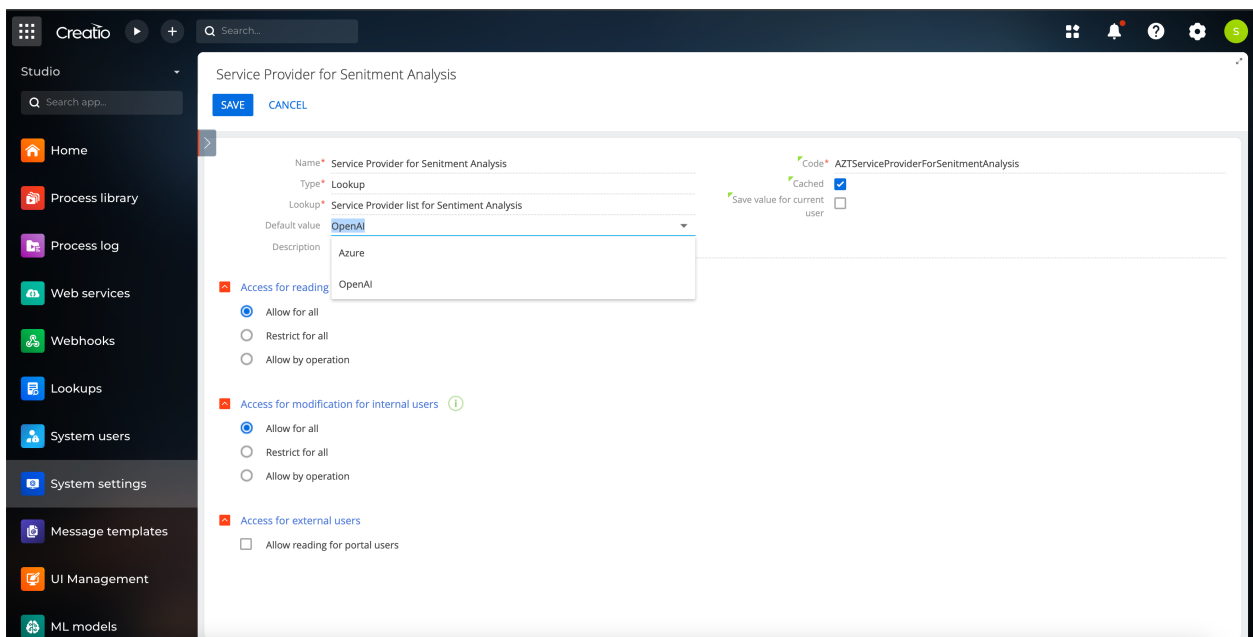


The Settings page appears.

- Under **System setup**, click **System settings**.



The System Settings page will appear. Search for the name " **Service Provider for Sentiment Analysis** " and select " **azure** " from the dropdown in the default value field.

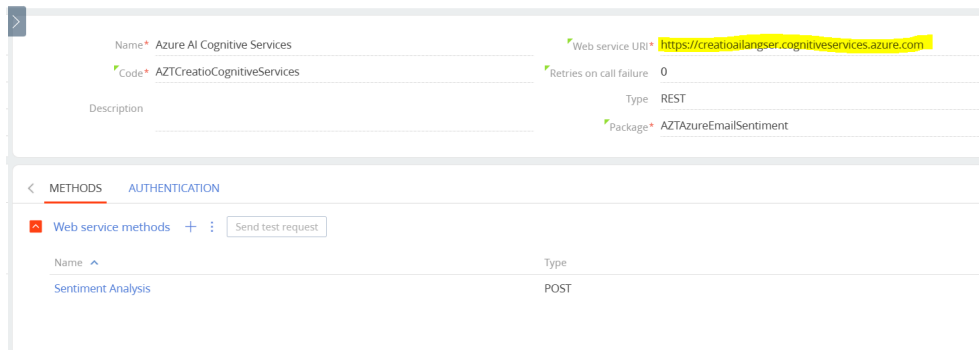


3.4 Setting up the Endpoint for the webservice in Creatio

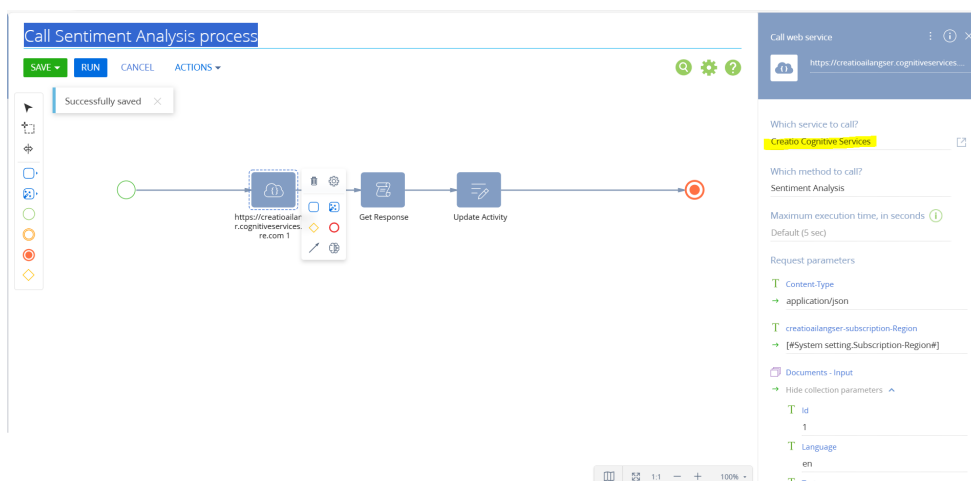
3. To configure the endpoint created from the Azure AI service into the webservice in creatio:
 - a. Navigate to the webservice section and search for " **Azure AI Cognitive Services** "
 - b. Open the webservice and change the Web service URI with the endpoint created from Azure AI service.

Azure AI Cognitive Services

CLOSE



- c. If you are unable to change the Web service URI, create a copy of the "**Azure AI Cognitive Services**" webservice. Paste the endpoint generated from Azure AI service into the Web service URI, and verify whether the "**sentiment analysis**" method reflects the new endpoint.
- d. Post creating the copy of the webservice, Check the package, if it is a OOTB "custom" package/Custom created package, ensure that the "AZTAzureEmailSentiment" package is added as a dependency in advance settings → Configurations.
- e. If a new web service was created because the endpoint was not added to "**Azure AI Cognitive Services**," navigate to the process library. Search for "**Call Sentiment Analysis Process**," click on the web service element, and replace it with the newly created webservice that has the Azure endpoint.

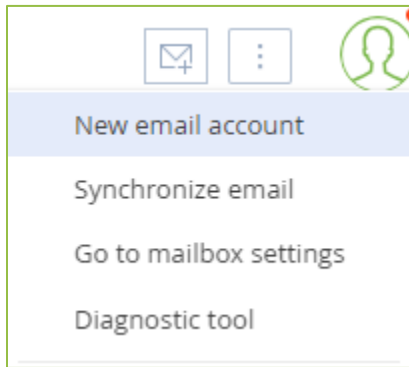


4. Click **Save**.

3.5 Configuring Mailbox

To configure mailbox, do the following:

5. Click **Email** icon in the right navigation pane.
6. In the top-right corner, click the vertical three dots Icon, and then click **new email account**.



The New email account box appears.

7. In the given box, enter your email ID and click **Next** and follow the instructions to configure your new email account.
8. Add case registration mailbox for automatic case creation: Navigate to the **Lookups** section -> **List of mailboxes for case registration**, create a new record specifying the mailbox to which the email is sent, and a case will be created automatically.

4 Sentiment Analyzer

4.1 Overview

You can see the sentiment analyzer in three following sections:

- Cases
- Contacts
- Accounts

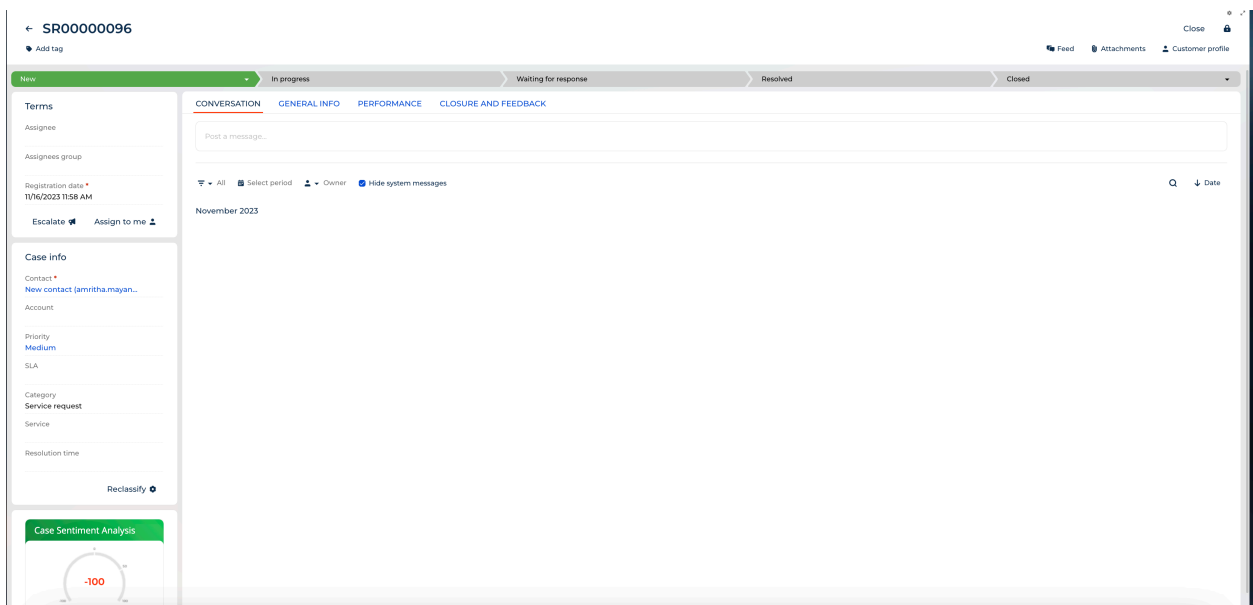
4.2 Cases

You can use the Cases to check the sentiment analysis of an email. The Email Sentiment Analyzer is a sophisticated tool that springs into action the moment an email lands in the designated inbox. It meticulously analyzes each case derived from customer emails and presents the sentiment data in an easily interpretable Gauge chart. This allows for a quick and comprehensive understanding of each customer's sentiment.

To check the case sentiment, do the following:

1. Go to **Service homepage**.
2. In the left navigation pane, click **Cases**.

The Cases page appears.
3. In the **Number** column, click the required Service Request number, example: #SR00000086.
4. The Case number info page appears where you can find the **Case Sentiment** gauge.



4.3 Contacts

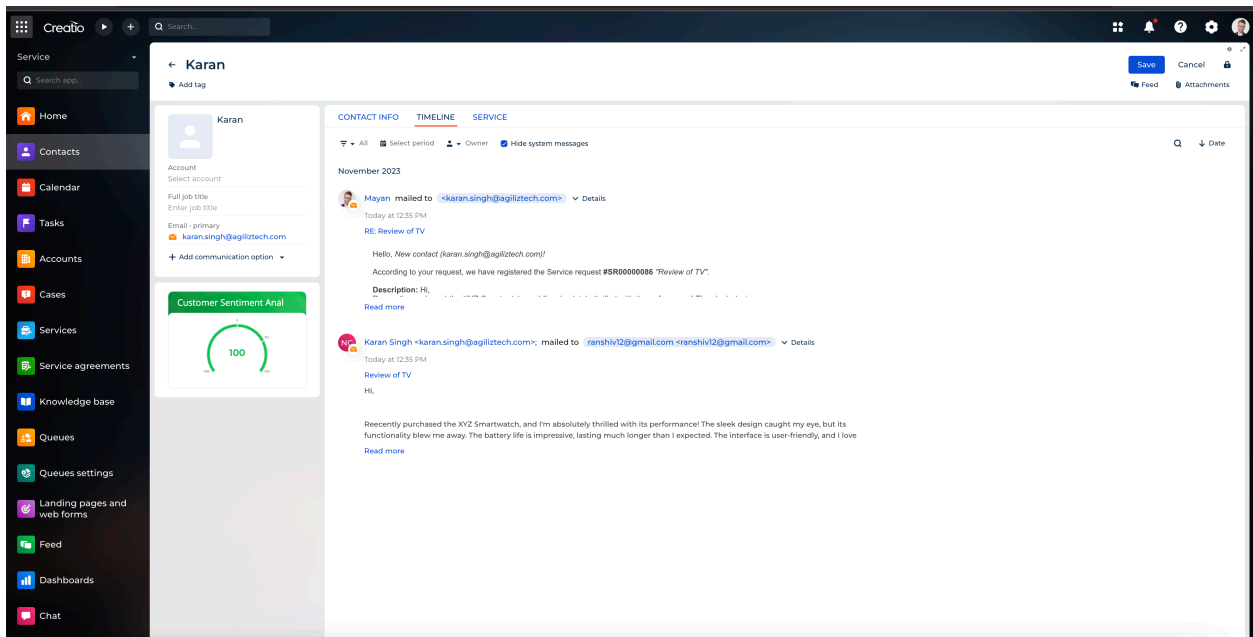
You can use the Contacts section gauging customer sentiment overall sentiment based on the email conversation. It meticulously analyzes the tone of email conversations and provides an overall sentiment score for the selected customer. This sentiment gauge, derived from the historical email interactions, offers valuable insights into the customer’s feelings and attitudes.

To check the case sentiment, do the following:

1. Go to **Service homepage**.
2. In the left navigation pane, click **Contacts**.

The Contacts page appears.

3. Choose the required customer.
4. In the selected customer’s contact info page, you can find the **Sentiment** gauge chart.



4.4 Accounts

You can use the Accounts section to assess the sentiment associated with a specific account. Each account may be linked to multiple email addresses, and the tool calculates an overall sentiment score by analyzing all associated emails. This provides a holistic view of the account’s sentiment, offering valuable insights for customer relationship management.

To check an sentiment of an account, do the following:

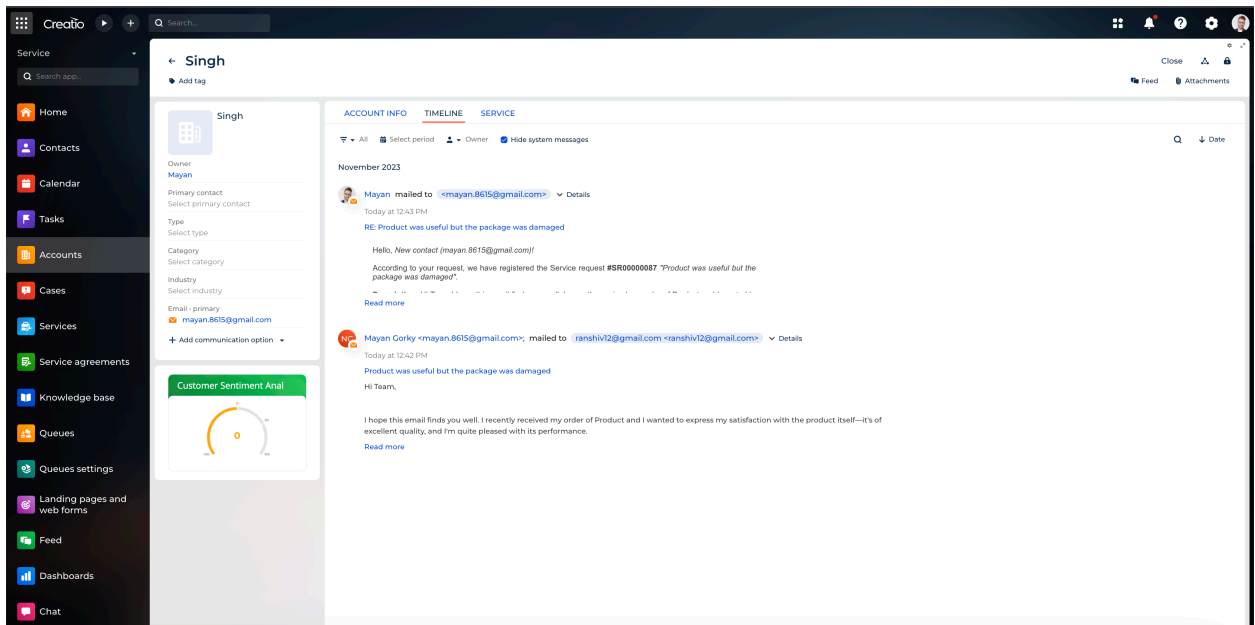
1. Go to **Service homepage**.

2. In the left navigation pane, click **Accounts**.

The Accounts page appears.

3. Choose the required Account.

4. In the selected Account's page, you can find the **Sentiment** gauge chart.



The screenshot displays the Creactio web application interface. On the left, a dark navigation sidebar lists various modules, with 'Accounts' highlighted. The main content area shows the 'Singh' account page. This page is divided into three sections: 'ACCOUNT INFO', 'TIMELINE', and 'SERVICE'. The 'ACCOUNT INFO' section on the left contains details for the account owner 'Mayan', including contact information and a 'Customer Sentiment Anal' gauge chart showing a score of 0. The 'TIMELINE' section displays a list of service messages from November 2023, including an email from 'Mayan' and a message from 'Mayan Gorky'.