

Hi there,

At Synthesio, our teams are committed to helping you achieve total consumer understanding. Related to data, this means going beyond social. Thus, we are thrilled to announce that you can now **ingest first-party data into your Dashboards**. With the update, you can aggregate all your conversational data in one platform. From there, you can apply Synthesio's Data Science enrichments to further your understanding of consumers.

As examples, here are the types of first-party data you can ingest into Synthesio:

- Customer service emails
- Chatbot
- CRM
- Satisfaction surveys
- After-sales surveys
- Market surveys
- Private forums
- Transcripts from call centers
- Support tickets
- ...

Oftentimes, consumer expressions contained in the above data sources are called "verbatim data". For consistency with the Synthesio experience, however, we will refer to them as Mentions going forward.

How to Ingest Private Data into Your Dashboard?

In the current Beta version, you will need to import data into your dashboard through a .CSV file.

This is a three-step process:

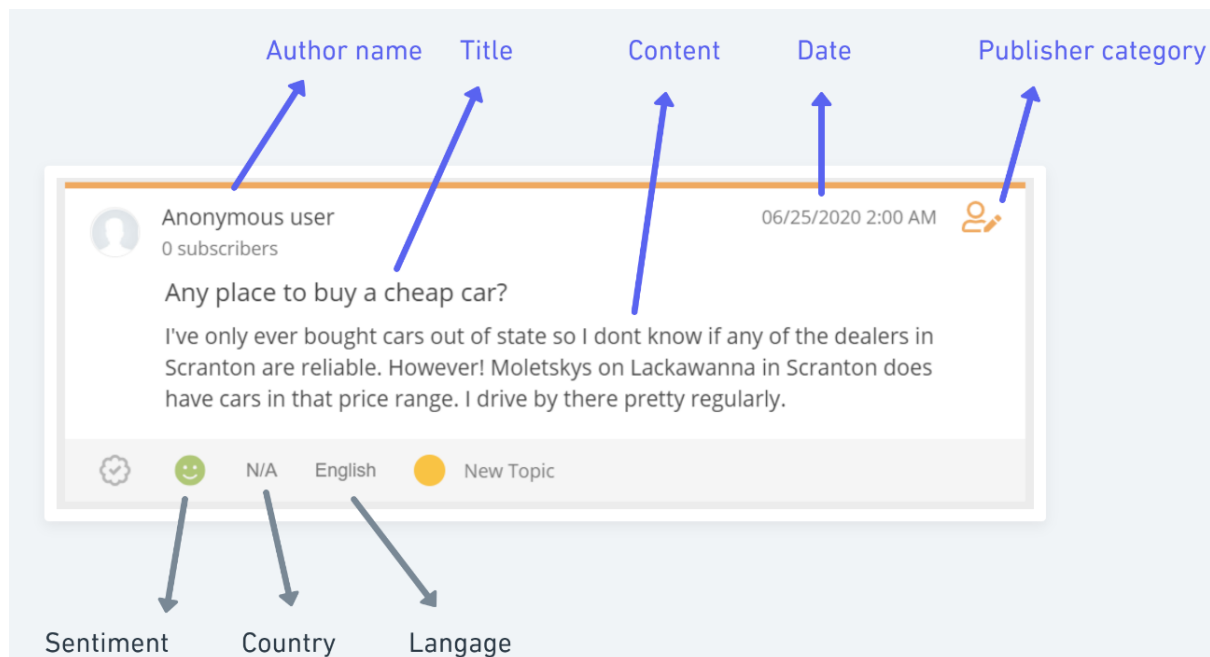
1. The **first step** is to import your data in your Synthesio workspace
2. The **second step** is to choose the dashboard in which you want your first-party data to be displayed
3. The **third step** is to configure the setup of the chosen dashboard

Preparing the Import

Important: If you want to upload first-party data files in your workspace, you must follow the below rules to complete the process:

- The import file must be a **.CSV file**
- The import file should **only have one-sheet**
- The import file should contain **fewer than 50,000 rows**
- The import file should be **smaller than 10MB**
- **Include a header row** in your file.
- Date format supported is **Year/Month/Day** (for example 2020/06/25)
- The import file needs to contain the **following fields in the exact order:**
 - **Title:** The title of the mention
 - **Content:** The body of the mention
 - **Date:** The date when the mention was created
 - **Author:** The name of the author of the mention

As shown in the illustration below, here is the structure of a mention:

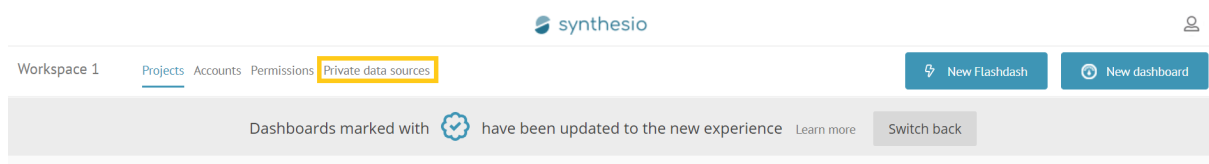


In blue, you can see the fields that need to be filled by the user when uploading the file. In black are the enrichment fields added by Synthesio when processing your data.

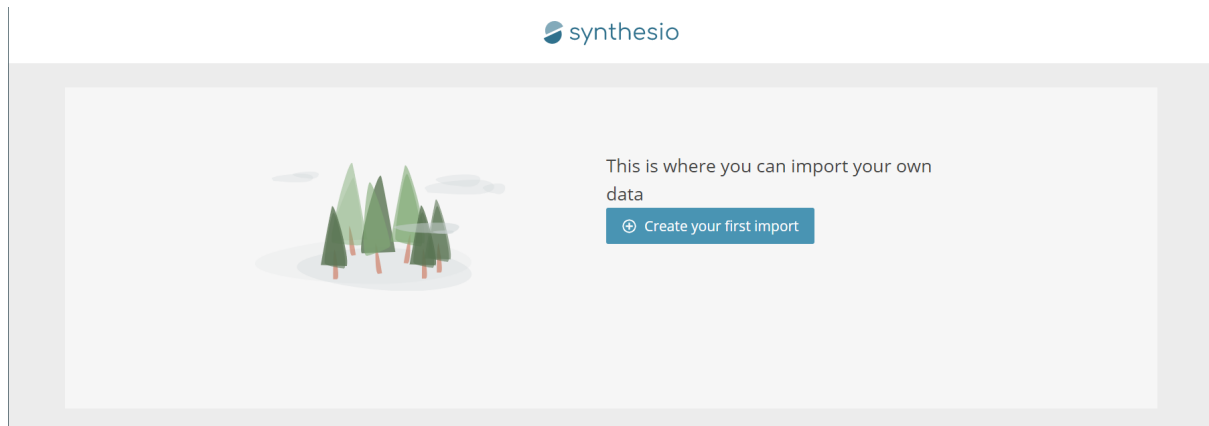
Please note that the “Publisher Category” needs to be filled directly in the interface when uploading the file. We will address this in the next section.

Uploading the File

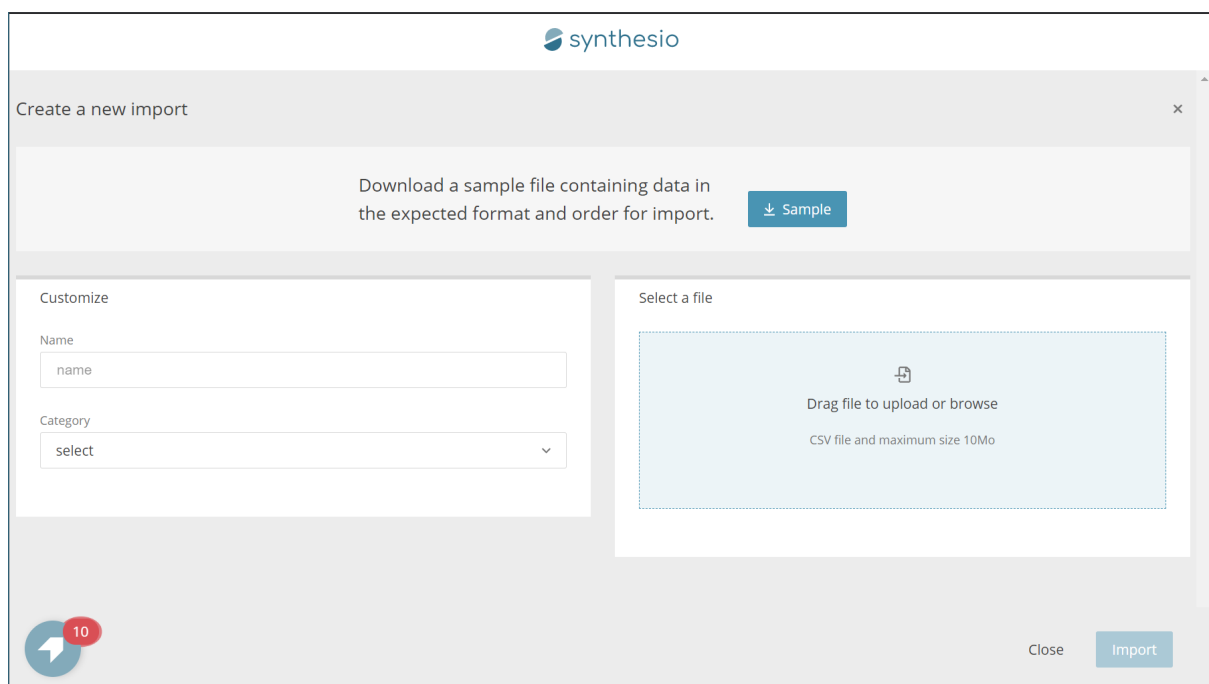
Once your file is ready, go to your workspace and click on “Private Data Sources”.



Once you are in the Private Data Sources tab, select “Create your first import”:



You will then access the screen where you need to import your file.



Here are the actions you need to complete in order to import your file correctly:

- Choose a name for your import. This name will be displayed in the setup of your dashboard.
- Select a publisher category for your import. **Available categories are:**
 - **Blogs**
 - **Forums**
 - **Reviews**
 - **Customer Surveys**

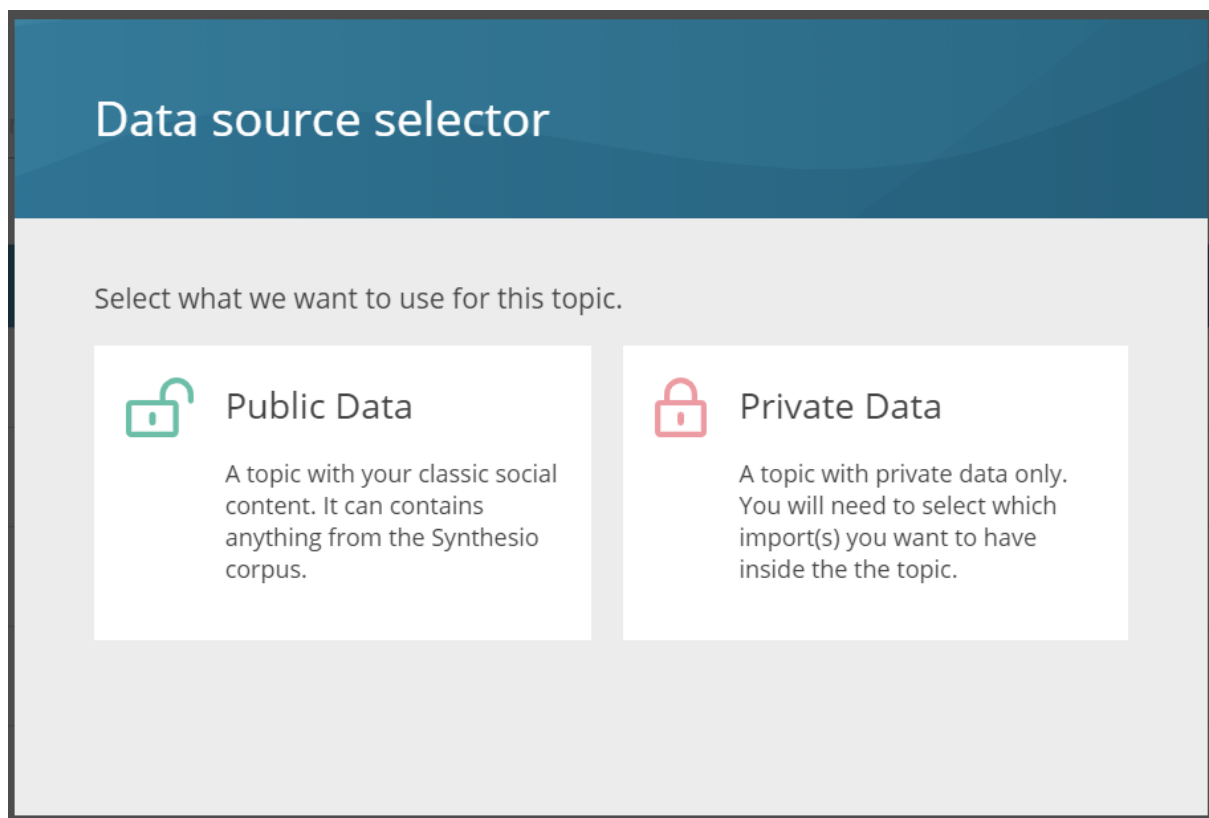
- **Emails**
 - Drag and drop or browse to add the file you previously prepared
 - Click on import
-

Configuring the Dashboard

Once the file is correctly imported in Synthesio, you then need to configure it as a Topic.

To accomplish this, you need to go into your Dashboard's Setting and create a new Topic. You will configure the Topic to ingest one or more of your imported files. The Topic will then contain all of the mentions found in the file(s).

When creating a new Topic in the setup, you will need to choose between public and private data.



Choose "Private Data". From there, you will then see all the private data files that you have imported into Synthesio.

Data source selector

Select the data sources you want your queries to use

8 of 200

Clear

Q Search

- All

☒	Import 0	14k
☒	Import 1	11k
☒	Import 2	8k
☒	Import 3	5k
☐	Import 4	4k
☐	Import 5	2k
☐	Import with a long name 4	4k

Cancel

Apply

Choose the file(s) you want to add to your Topic, click on apply, and all the mentions from the selected file(s) will be added to your newly created Topic.

Manipulating Private Data in Your Dashboard

Mentions coming from private data will look like any other mentions from public sources. When filtering those mentions, you can:

- Filter by Topic. Important to note, a Topic with private data cannot also contain public data.
- Use the Private Sources filter that will allow you to choose which import file you want to filter.