

Doc Plan: Channel Grouping

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Status: In review | **In progress** | Completed

Objective

The objective of this documentation project is to create a general audience user guide explaining Channel Grouping (which is located in the **Integration** section of the Tomi.ai dashboard).

Scope

This project comprises the following:

- Research and SME discussions to verify dashboard functionality and use cases
- Drafting and reviewing all sections listed as deliverables
- Incorporating screenshots, step-by-step instructions, and example workflows for multiple personas
- Publishing the finalized guide to the Tomi.ai articles subdomain

Out of Scope: API documentation, recent changes to UI, or content in other parts of the dashboard, outside of Channel Grouping.

Deliverables

The Channel Grouping guide will contain the following subsections:

1. **Overview**
2. **Dashboard** (explanation of each column, its function, and any conditions)
3. **Set up and customization** (numbered list with instructions and screenshots)
4. **Use cases**
5. **Recap**

Audience

Marketers, CMOs, Group Heads, Customers, and Prospects

Channel Grouping Doc Plan

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The target audience is interested in obtaining a better understanding of the Channel Grouping dashboard and how they can benefit from it.

Detailed Content Outline

1. Overview

- Where is it located, how do you get to the channel grouping dashboard
 - **Accessing the dashboard:** Are there any access restrictions for users? (For example, if there are multiple people assigned to a company's account) Do all account holders automatically have channel grouping editing access? Also is there a limit on how many new channels can be created?
- What is the purpose of channel grouping and how does it benefit the customer
- Channel grouping's relationship with other dashboards and the Tomi.ai product
 - Predictive attribution report
 - How are changes in channel grouping reflected in the report? What changes occur to the report when you create a new channel? When you add a new rule to the same channel? When you edit an existing rule?

2. Dashboard

- Getting to know the channel grouping dashboard (explanation of each column, its function, and any conditions)
- Preset channels are available for the most commonly used marketing channels and are set by the customer success manager.
 - a. Each preset may be edited or deleted
- Dashboard columns
 - a. Priority
 - b. Channel Name
 - c. Condition
 - d. Stage
 - applied: the rule is applied and used to build the report
 - new: the rule is created but not applied
 - deleted: when you delete a rule the delete tag will show. When you rematch it will be deleted forever. Even if you delete but do not rematch it will still go into the report until you rematch. The algorithm doesn't know that the matching needs to be changed just yet. Deleted means it will be deleted after rematching.

3. Set up and customization (Numbered list with instructions and screenshots)

- Creating rules and channels: brief overview and background information
 - How to create a new rule
 - Rules can be created for new channels or existing channels
 - New rules for new channels
 - New rules for existing channels
 - Mention all UI components in the create rule window
 - Briefly note how rematching must be done to complete the process
 - How to edit an existing rule
 - Mention all UI components in the edit rule window
 - Briefly note how rematching must be done to complete the process
 - How to delete a rule
 - Delete: *Delete a rule by selecting **Delete** from the rightmost column of the rule table.*
 - Summarize the delete information presented in the second section above
 - Channel prioritization
 - Each channel is given a priority. This priority is adjustable and can be changed using the drag and drop functionality.
- Apply changes with Rematching
 - To apply the changes you have made click the **Rematch** button.
 - What is rematching-This recalculates the channels and the visit data in the Predictive Attribution report. Configures the new rules in the report.
 - Rematch processing times
 - Restate the information regarding rematching and deleting rules

4. Use cases

- Performance marketer workflow: A background story and suggested workflow for a marketer to follow when interacting with the channel grouping dashboard.
- CEO or small business owner: A background story and suggested workflow for a small business owner to follow when interacting with the channel grouping dashboard.

5. Recap

- The benefits of using the channel grouping dashboard
- Brief discussion on how to get started

Information Architecture

The Channel Grouping guide will live in Google Docs to receive team comments and feedback. It will then be published to a general audience in Tomi.ai's subdomain for articles after final changes and edits have been completed.

Milestones & Timeline

1. Draft Content: June 10–June 21, 2025
 - Complete all subsections with placeholder screenshots
 - Send draft for initial SME review
2. Review & Finalize: June 24–July 1, 2025
 - Incorporate SME feedback
 - Ensure style guide compliance and update screenshots if required
3. Publish: July 3–July 5, 2025
 - Publish to Tomi.ai articles subdomain
 - Notify stakeholders

Notes

Possible linked articles:	● Predictive attribution reports ● Understanding UTM parameters
Edit the UI for the Channel Grouping page	<i>Here you can view existing channel grouping rules. You can also create new rules and edit the existing ones. Please remember to click the Rematch button to apply changes. (Bold suggestion from the MS Style Guidelines.)</i>

SME Discussion/Record of Decisions

Meeting with J. Angilova held on 5/25/25 to discuss UI features and predictive attribution report.

Resources Used

- Channel grouping overview article supplied by customer support
- [Tomi.ai](#) app dashboard

