

Customer Lookup allows users to search for, view, and edit details about specific individuals in the Ascent360 database.

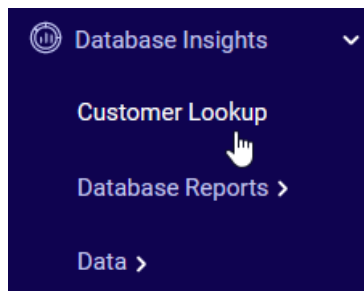
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Accessing Customer Lookup

Customer Lookup is found under **Database Insights** on the left side navigation menu.



Searching the database

Use the Search bar to search for any individual in the database. Ascent360 will pull partial matches for your search criteria. Alternatively, use the **Advanced Search Options** to search by one or more specific fields to narrow your search. Click **Basic Search Options** to return to the single search bar.



Search

Additional Search Options

First Name

Last Name

Email Address

Phone Number

Serial Number

Brand

Address

City

State

Zip Code

Ascent360 ID

Search

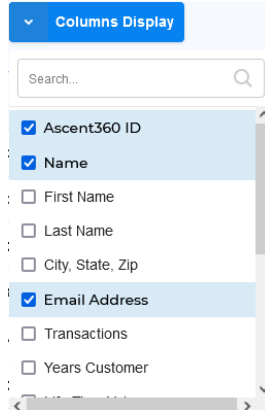
Clear

Browse Results

A maximum of 500 results will be returned for any one search. View the total number of individuals returned by a search in the upper left corner. If your results return more than 500 results, it is recommended to refine your search using the **Advanced Search Options**.

Adjust Columns

Use the **Columns Display** drop-down on any table within **Customer Lookup** to add or remove columns from the table display.



- Adjust the column width on the results table by hovering on the dividing line between columns and clicking & dragging.
- Click and drag any column header to reorder the column display.
- Click any column header to sort results ascending or descending.

Export Results

Click the **Export** button next to the **Columns Display** to immediately send a file of the returned results to **File Manager**. The file will be dropped in a folder labeled **Customer Lookup** within the active user's folder.

View Individuals

Once your search results are returned, you can view details of a specific customer from the list of customers returned by the search. To select a customer from the list, click anywhere on the row that corresponds to the customer. The **Customer Overview** page will open.

The screenshot shows the 'Customer Overview' page for Holly Smith. On the left, a sidebar contains basic information: Ascent360 ID: 15589072, Name: HOLLY SMITH, Location: Bethesda, MD, Status: Customer, Created: 11/10/2012, RFM Score: 444, Email: hollys73@ascent360team.m8r.co, and Address: 7700 Norfolk Ave, Bethesda, MD 20814-6006. There are expandable sections for Contactability and Demographics, and an Edit button. On the right, a navigation bar includes Overview (selected), Email History, Transaction History, Web History, and Reservation History. Below this is the Product Registration History section. The main content area features an Email Summary table with metrics like First Email Delivered (06/08/2022), Last Email Delivered (06/20/2022), Last Email Opened (07/25/2022), and counts for Emails Sent, Opened, Clicked, and Unsubscribed over the past 12 months. There are also expandable sections for Transaction Summary and Web Summary, and a link to View Full Email History.

Email Summary			
First Email Delivered:	06/08/2022	Emails Sent - Past 12 Months:	1
Last Email Delivered:	06/20/2022	Emails Opened - Past 12 Months:	3
Last Email Opened:	07/25/2022	Emails Clicked - Past 12 Months:	0
Last Email Click:		Unsubscribed:	

On the left side of the Customer Overview Page, you will find basic information about the selected customer. You'll see contact information, Customer or Prospect Status, RFM, Contactability, and Demographics. Click the **Edit** button to make changes to details relating to the individual.

Email History, Transaction History, Web History, Reservation History, Product Registration History

On the right side of the **Customer Overview** page, you'll see sections for aggregated information on Email, Transaction, Web, Lodging or Other data in your CDP. Available sections and data population will vary based on the type of information you have in your database.

This block provides a detailed view of the Email Summary section from the screenshot. It shows a table with email performance metrics for the past 12 months. The metrics include dates for the first, last, and most recent email delivered and opened, as well as counts for emails sent, opened, clicked, and unsubscribed. A link to view the full email history is provided at the bottom of the summary.

Email Summary			
First Email Delivered:	06/08/2022	Emails Sent - Past 12 Months:	1
Last Email Delivered:	06/20/2022	Emails Opened - Past 12 Months:	3
Last Email Opened:	07/25/2022	Emails Clicked - Past 12 Months:	0
Last Email Click:		Unsubscribed:	

If you do not see any data for Web History, you're likely not utilizing our web tracking feature. If you want additional information, [please click here](#) or contact our support team at support@ascent360.com.

Navigate between categories by using the top tabs or by clicking the “View Full Transaction History” button at the bottom right.

The detail pages allow you to see specific information for each interaction a customer has made – such as all transactions on file or the emails they’ve opened. These will be shown on the respective detail pages.

Search these pages for specific transactions or interactions utilizing the search bar at the top.

Customer Lookup > Holly Smith > Transaction History

Transaction History

[Export](#) [Columns Display](#)

Customer Id	Transaction Id	Transaction Date	Campaign	Product Code	Product	Price	Total	Quantity	Location
0	471872...	05/30/2022	22 Transactions		Rockhopper Comp...	\$494.73	\$989.46	2	Online
0	631216...	11/10/2012	12 Transactions		Propero II Helmet ...	\$133.75	\$401.24	3	Online

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Edit Individuals

Information relating to demographics or contactability can be edited directly in **Customer Lookup**. Click on the pencil icon directly from the search results or **Edit** on the **Customer Overview** to view a list of fields that can be edited in **Customer Lookup**.

Navigate Sections

Use the breadcrumbs across the top of the page to navigate back to the **Customer Overview** page or to the Search Page. Click on the customer name to return to **Customer Overview** and click on **Customer Lookup** to return to the search page.

Customer Lookup > Holly Smith > Email History

Email History