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This count indicates the number of people in the CDP. A person is defined as a single contactable individual.

This pie chart shows the breakdown of customers and prospects in the CDP. A customer is defined as a person who has made a purchase. Hover over the pie pieces to reveal the count of customers or prospects.

This pie chart shows the breakdown of the customers in the CDP. An active customer is someone who has purchased in the last 2 years (or 730 days). Hover over the pie pieces to reveal the count of each customer type.



This number represents the overall average order value, considering all transactions for all time.

This line chart shows the average order value by transaction date. This allows the user to see the seasonality of customers' purchases.



This shows the percentage of people in the CDP with an email address on file.

This detail view allows the user to compare how email addresses are being collected across sources. A source with a low percentage of emails may need to be investigated.



This is the percentage of email subscribers in the CDP who have opened an email in the last 6 months.

This pie chart shows a breakout of subscriber engagement by percentage of total subscribers. Subscriber engagement is put into the below three categories:

- **Highly Engaged:** The subscriber has opened 60-100% of the email sent to them.
- **Engaged:** The subscriber has opened 21-60% of the email sent to them.
- **Unengaged:** The subscriber has opened 0-20% of the emails sent to them.

The percentages in this chart are based off of the total history for a subscriber. There is no specific time limit set for this report.

This bar chart shows the number of subscribers by the last time the subscriber interacted with an email message. An interaction is defined by an open or a click of an email.



This is how much revenue was attributed to marketing in the past 12 months. The pie chart shows the proportion of the revenue driven by marketing plays vs. ad hoc sends.

This pie chart shows the top 5 marketing play types, and how much revenue was driven by each type of play in the last 12 months.



This percentage is how much revenue is driven by top customers. A top customer is defined as a person with a recency score of 5 and an monetary score of 5. (We don't consider frequency in this calculation due to many customers having only one purchase).

To create a campaign of top customers, simply choose "Top Customers" from the audience list. This audience is available by default.





This is the percentage of email subscribers who have been sent an email in the past 6 months.

This pie chart shows how many emails each subscriber has received in the past 12 months.

This bar chart shows the month each subscriber received their last email. If a subscriber has received an email in July, August and September, they will show only in September.



This is the average open rate for all time. This value is calculated by taking a count of all opened emails and dividing it by a count of all delivered emails.

This is your average open rate over time, calculated monthly.



This is a count of all the distinct data sources in the CDP active in the last month.

This list displays the top 3 sources for the current month, based on number of records.



The recent data loads bar chart shows data loaded from the top 3 sources over the last 8 weeks. The counts are split by people, transactions, and records

In this tab, the count of people loaded from that source shows as the y-axis. A person is defined as a single

contactable individual.

In this tab, the count of transactions loaded from that source shows as the y-axis. For sources like webforms, this will be the number of submissions. For transactional data sources, this is the number of purchases.

In this tab, the count of records loaded from that source shows as the y-axis. For sources like webforms, this will be the number of submissions. For transactional data sources, this is the number of line-items (products purchased).



This multi-pie chart shows the percentage of people in the CDP contactable by channel type. In this chart, "Contactable" means that a person has a valid email, phone number or postal address *and* they are opted in (either explicitly or implicitly) to receive communications via that channel. "Not Contactable" includes all people in the CDP who don't have a valid email, phone number or postal address, or those who are not opted in to receive communications via that channel. At the bottom, you can see how many people the whole pie represents.

Both Facebook and Google percentages are assumed based on the number of valid emails in the CDP, because accessing that data is not allowed by Facebook or Google's terms of service for privacy reasons.



This chart shows growth of new individuals have entered the database per month or year. Use the switch to change the granularity of the x-axis from monthly to yearly.

The database tab shows how many people were *added* to the CDP per month (or year, depending on the selection of the granularity)

The cumulative tab shows how large the CDP has become over time.

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This chart shows the age ranges of people in the CDP who have an age on file (this chart *does not* show unknowns)

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This chart shows the genders of people in the CDP who have a gender on file (this chart *does not* show unknowns). Ascent360 applies gender based on a name table (names that are *always* one gender vs another will be applied, but names like "Pat" will show as unknown)

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This chart shows the marital statuses of people in the CDP who have an marital status on file (this chart *does not* show unknowns)

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This chart shows the income ranges of people in the CDP who have an income on file (this chart *does not* show unknowns)

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This chart shows the occupations of people in the CDP who have an occupation on file (this chart *does not* show unknowns)

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This chart shows the highest level of education of people in the CDP who have an education on file (this chart *does not* show unknowns)

This chart shows the how many people in the CDP have children in their household. If there has not been a data append, there will be no "No" values in the data (because if we do not see a child in the household, there is a possibility there is a child there, just not in the CDP, so those are shown as "Unknown"). "Yes" is both appended data and calculated based on the ages of the people in the household.



This chart shows the number of customers by the number of purchases they have made in their lifetime. Hover over the bar to see the count of people who have made multiple purchases.



This pie chart shows all of the revenue in the CDP, split out by the monetary score of the people who made the purchases. A large percentage of revenue can typically be attributed to people with a monetary score of 5.



This bar chart shows the average days since last purchase for each recency score - this is also represented in the "Avg Days" column in the recency data table to the right.



The recency data table shows detailed information about each recency quintile.

The recency score of the quintile. A "0" value here shows the prospects in the CDP.

This is the count of people with each score.

This is the percentage of all customers who have each recency score.

This is the minimum number of days since the last purchase of all customers with this recency score.

This is the maximum number of days since the last purchase of all customers with this recency score.

This is the average number of days since the last purchase of all customers with this recency score.

This is the average number of emails sent to all customers with this recency score.

This is the open rate of emails sent to all customers with this recency score.

This is the click rate of emails sent to all customers with this recency score.



This bar chart shows the average number of purchases for each frequency score - this is also represented in the "Avg Purchases" column in the frequency data table to the right.



The frequency data table shows detailed information about each frequency quintile. It is likely that there are less than 5 frequency scores, especially if there are a lot of one-time purchasers in the CDP.

The frequency score of the quintile. A "0" value here shows the prospects in the CDP.

This is the count of people with each score.

This is the percentage of all customers who have each frequency score.

This is the minimum number of purchases of all customers with this frequency score.

This is the maximum number of purchases of all customers with this frequency score.

This is the average number of purchases of all customers with this frequency score.

This is the average number of emails sent to all customers with this frequency score.

This is the open rate of emails sent to all customers with this frequency score.

This is the click rate of emails sent to all customers with this frequency score.



This bar chart shows the average lifetime spend for each monetary score - this is also represented in the "Avg Lifetime Spend" column in the monetary data table to the right.



The monetary data table shows detailed information about each monetary quintile.

The monetary score of the quintile. A "0" value here shows the prospects in the CDP.

This is the count of people with each score.

This is the percentage of all customers who have each monetary score.

This is the minimum lifetime spend of all customers with this monetary score.

This is the maximum lifetime spend of all customers with this monetary score.

This is the average lifetime spend of all customers with this monetary score.

This is the average number of emails sent to all customers with this monetary score.

This is the open rate of emails sent to all customers with this monetary score.

This is the click rate of emails sent to all customers with this monetary score.

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This multi-pie chart shows the percentage of people in the CDP contactable by channel type. In this chart, "Contactable" means that a person has a valid email, phone number or postal address *and* they are opted in (either explicitly or implicitly) to receive communications via that channel. "Not Contactable" includes all people in the CDP who don't have a valid email, phone number or postal address, *or* those who are not opted in to receive communications via that channel. At the bottom, you can see how many people the whole pie represents.

Both Facebook and Google percentages are assumed based on the number of valid emails in the CDP, because accessing that data is not allowed by Facebook or Google's terms of service for privacy reasons.

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This stacked bar chart shows the number of people in the database by what SPAM Law Authority they live under. SPAM Law Authority is informed by the self-reported country the person lives in and the domain extension of their email address. To learn more about SPAM Law Authority and how it is applied by reading about **Email Permission Management**.

Mouse over the bar to learn the breakdown of email permission by SPAM law authority. The email permissions represented in the chart include implicit and explicit permissions, so the count of Email Permission = Yes under CANSPAM includes people who have explicitly said "please send me emails!" *and* people who have simply given their email address and not unsubscribed.

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This stacked bar chart shows the number of people by how they are consented. Explicit consent means that a person explicitly stated they did or did not want to be contacted by email. Implicit consent means that the email address is in the clients' CDP but there is no record of the person explicitly stating they do or do not want to be contacted by email. To learn more about types of consent and how they affect permissioning by reading about **Email Permission Management**.

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This pie chart shows the data Ascent360 receives from the email service provider about the contactability of the email addresses contained in the ESP.

Subscriber Status

Each subscriber has one of the following statuses:

Status	Explanation
Active	<ul style="list-style-type: none">• No activities have occurred to make the subscriber's status Bounced, Undeliverable, Unsubscribed, or Deleted.• A subscriber whose status was Bounced or Undeliverable is recorded as having opened or clicked through a received email. In this case, the system changes the subscriber's status back to Active.
Returned	<ul style="list-style-type: none">• One or two soft bounces are received for the subscriber.• One hard bounce is received for the subscriber.
Undeliverable	<ul style="list-style-type: none">• Three hard bounces or three soft bounces are received for the subscriber and at least 15 days have passed since the first bounce.• If the bounce was from a trusted domain, only one hard bounce is required. For the most current list of trusted domains, contact your account manager
Unsubscribed	<ul style="list-style-type: none">• The subscriber has requested to be removed from a single list, multiple lists, or all lists. In these cases, the subscriber's status is changed to Unsubscribed for the selected list(s) or at the All Subscribers level.• A user manually unsubscribes a subscriber, thus changing the status to Unsubscribed for the list at which the action was taken.• The subscriber has submitted a spam complaint. In this case, the subscriber's status is changed to Unsubscribed at the All Subscribers level.



This pie chart shows a breakout of subscriber engagement by percentage of total subscribers. Subscriber engagement is put into the below three categories:

- **Highly Engaged:** The subscriber has opened 60-100% of the email sent to them.
- **Engaged:** The subscriber has opened 21-60% of the email sent to them.
- **Unengaged:** The subscriber has opened 0-20% of the emails sent to them.

The percentages in this chart are based off of the total history for a subscriber. There is no specific time limit set for this report.



This table displays email tracking information for the last 50 emails sent from the connected ESP. Counts and rates are pulled from the ESP nightly, but is 2 days behind because of the timing of when the call is made.



This line chart shows the open rate of all emails sent (by month) in the last 3 years. After pulling this data from the ESP, Ascent360 calculates open rate by summing all of the opens and dividing by the sum of all of the deliveries.



This line chart shows the unique click rate of all emails sent (by month) in the last 3 years. After pulling this data from the ESP, Ascent360 calculates unique click rate by summing all of the unique clicks and dividing by the sum of all of the deliveries.



This line chart shows the bounce rate of all emails sent (by month) in the last 3 years. After pulling this data from the ESP, Ascent360 calculates bounce rate by summing all of the hard bounces and dividing by the sum of all of the deliveries.



This line chart shows the unsubscribe rate of all emails sent (by month) in the last 3 years. After pulling this data from the ESP, Ascent360 calculates unsubscribe rate by summing all of the unsubscribes coming from emails and dividing by the sum of all of the deliveries.



This pie chart shows the percentage of people in the database with an address by their address certification.

- **DPV Good:** These addresses are in the USA and are verified by USPS to be deliverable.
- **DPV Bad:** These addresses are in the USA and are **not** verified by USPS to be deliverable.
- **Canada Good:** These addresses are in Canada and are verified by Canada Post
- **Foreign:** These addresses are outside of the USA and Canada.



This stacked bar chart shows the number of people who live in the top 30 countries in the CDP, and what their postal permission is.

This map shows the overall geographic dispersal of the CDP. This map shows all data in the CDP (not just in the US) but is defaulted to center on North America (since that is where the majority of the CDP data is located).

This table and map combo shows the top metro areas (in the USA and Canada) in your CDP and the geographic dispersal of the people in that metro area. This can help determine if the majority of the people in the CDP live in the suburbs or in the city center. By selecting different metro areas on the left, the map on the right changes to display people in that metro area.

This table and map combo shows the top states (in the USA, Canada and Mexico) in your CDP and the geographic dispersal of the people in that state. This can help determine if the majority of the people in the CDP live in the suburbs or in the city center. By selecting different states on the left, the map on the right changes to display people in that state.

The Top & Bottom customers page profiles the characteristics of your top customers (those with a recency score of 5 and a monetary score of 5) and your bottom customers (those with a recency score of 1 and a monetary score of 1)

The metrics displayed include demographic information, customer-level aggregates and geographic data.



To change the order of the metrics displayed, simply drag and drop the metrics. The metrics will be re-ordered for all users of your organization.



To update the metrics displayed on the page, click the "Update Metrics Displayed on this Page" link at the bottom right.



This will open the Selected Metrics window. Check any metrics you want to show on this page, and uncheck any you want to hide. Click "update" to save your selection.



This is a count of all the distinct data sources in the CDP active in the last month.

This list displays the top 3 sources for the current month, based on number of records.



The recent data loads bar chart shows data loaded from the top 3 sources over the last 8 weeks. The counts are split by people, transactions, and records

The Data Sources History table displays the entire history of data loads in the CDP. By default, this table shows all data sources over all time. Use the date chooser in the upper right to select different date ranges, or choose a custom date range.

By updating the date range, the counts and rows will change based on the date range.

This pie chart shows the total population of your CDP by their First Source value. The First Source value is the first interaction point each person has with the CDP, so this pie chart displays how people are making it into the CDP. Mouse over the slice to see the count of people in addition to the percentage of total population.

This pie chart shows the total population of your CDP by their Last Source value. The Last Source value is the last interaction point each person has with the CDP, so this pie chart displays how people are most recently interacting with the CDP. Mouse over the slice to see the count of people in addition to the percentage of total population.

This pie chart shows the total revenue on file in your CDP by the first source of the people purchasing. This displays which sources are the biggest drivers of revenue. Mouse over each slice to learn the dollar amount of the revenue attributed to people from that source.

This pie chart shows the total revenue on file in your CDP by the last source of the people purchasing. Mouse over each slice to learn the dollar amount of the revenue attributed to people interacting with that source.

At the bottom of the page, select a source from the dropdown to reveal more information about that source.

This is the percentage of people in the CDP who have only interacted with this source

This is the percentage of people whose purchases are only from this source. This is helpful if you are trying to identify what percentage of your database has only ever lodged but never transacted, or vice versa. If the source is not transactional, it will always show 0%.

This displays the number of people added to the CDP in the last 12 months with this source as their First Source value. These people *may* have also interacted with other sources, but this source was where they first entered the CDP.

This displays the amount of revenue in the last 12 months that came from people whose first source was the source selected. For contests and one-time loads, this can tell you whether running the contest was worth it to grow your database and revenue.

This displays the overlap between this source and other sources flowing into the CDP. The "Other Sources" circle represents people who are in all of the other sources that are flowing in to the CDP. The {This Source} circle (labelled "Contest" in the diagram above) represents people who are in this source. The overlap between the two circles displays the number of people who are in this source *and* other sources.

The data quality page speaks to the quality of the data in the CDP (after it has been through the matching and cleansing process). This page can help determine if there needs to be stricter rules for the data processing, or data that should be ignored.

This chart shows the quality scores of the Name, Address, Email and Phone data in the CDP, and the overall data quality. Each person in the CDP is assigned a quality score for each type of contact data. The criteria for each score is shown below

- Name Quality Score
 - Name Quality = 0
 - This person does not have a first name or a last name on file
 - Name Quality = 50
 - This person only has a first OR a last name (not both)
 - Name Quality = 100
 - This person has both a first and last name on file
- Address Quality Score
 - Address Quality = 0
 - This person does not have a postal address on file
 - Address Quality = 50
 - This person does not have a full postal address on file, but there is a postal code on file
 - Address Quality = 100
 - This person has a full postal address on file which has been verified with USPS or Canada Post.
- Email Quality Score
 - Email Quality = 0
 - This person does not have an email address on file
 - Email Quality = 25
 - This person gave an email address that was invalid (did not have an @ sign) and the email address bounced
 - Email Quality = 50
 - This person gave an email address that was invalid (did not have an @ sign) but the email address has not yet bounced
 - Email Quality = 75
 - This person gave an email address that was valid but the email address has since bounced
 - Email Quality = 100
 - This person has a valid email address on file that has not bounced.
- Phone Quality Score

- Phone Quality = 0
 - This person does not have a phone number on file
- Phone Quality = 50
 - This person has an invalid phone number (phone number is shorter than 10 digits or longer than 11)
- Phone Quality = 100
 - This person has a valid phone number (phone number is between 10 and 11 digits)
- Overall Quality Score
 - This is an average across all contact data scores.

This chart displays the overall quality score by the first source. Since the first time someone interacts with the CDP is when you are most likely to get the highest quality information, this can tell you where there may be deficits in the data collection process.

This table allows you to see how many people fall in to different categories of data quality, and export sample records of the people with that data quality. This can help determine which people need more information collected about them to fully round out their customer profile.

This data table shows the top 50 customers by lifetime spend, average order value and frequency of purchases. It is often true that the top few records are actually employees or test records that need to be ignored. This table can help determine whether there needs to be more rules applied when importing records, and even identify if there is suspicious activity by certain customers.

This table shows the top 25 email addresses by people associated with them. This can help identify if there are test or default email addresses being used that should be excluded from the CDP.

This table shows the top 25 phone numbers by people associated with them. This can help identify if there are test or default phone numbers being used that should be excluded from the CDP.

This table shows the top 25 postal addresses by people associated with them. This can help identify if there are test or default postal addresses being used that should be excluded from the CDP.
