

When customer records are loaded into the database, Ascent360 employs a thorough sanitation, matching, and de-duplication process to determine a "Golden Record" for each individual. This article will help you understand which records Ascent360 will incorporate into the database and which records it will not.

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What is an Individual?

Each individual in the Ascent360 database is assigned a unique individual ID, called the Ascent360ID. An individual is defined by some combination of the following fields:

- First Name
- Last Name
- Address
- City
- State
- Postal Code
- Email Address
- Phone
- Cell Phone
- Company Name

Most customer records that are loaded to the database will be missing many of the above fields. In general, a customer record will be loaded to the database if it is contactable in some form and includes data that can be used for marketing purposes.

Use Cases, Examples, and Exceptions for Creating an Individual

1. A record with a First Name or Last Name only will be skipped.

- Example: An incoming transaction record is attributed to "John Smith" in the source system. This customer record (and its associated transaction information) will be skipped because Ascent360 will not be able to reliably match this record to another at some point in the future. Even if another "John Smith" with a full email comes in, we cannot safely match the first record to subsequent records.

2. Ascent360 will load records that only consist of an email address.

- Example: An incoming customer record has an email address "jsmith@ascent360.com" – this record will be loaded to the database. If another record with the name "John Smith" and the same email comes through at a later point, Ascent360 will match and consolidate these records based on the shared data

point.

3. By default, Ascent360 will not load records that only consist of phone data.
4. There are about 150 combinations of contact information that result in Ascent360 creating an individual in the database.
5. Two individuals can have the same email address, the same phone number or the same physical address.

Below is an example of two distinct individuals in the database that share the same email address, postal address, and phone number. Two common explanations for distinct individuals sharing data are:

1. Family members or roommates share a postal address
2. Parents may use their personal email address to sign their child up for activities (such as a ski lesson). The child may be in the database as a separate individual with the same email address as the parent (child records with a known age under 16 years old will be automatically unsubscribed).

Ascent360 ID	Name	Address	Email	Phone
12345672	Susan Johnson	123 Main Street, Golden Colorado	sjohnson@ascent360.com	303-555-1212
54321543	Ted Johnson	123 Main Street, Golden Colorado	sjohnson@ascent360.com	303-555-1212

Below is an example of a few individuals with different amounts of information:

Type	Ascent360 ID	Name	Address	Email	Phone
Email Only	12345672			sjohnson@ascent360.com	
Name + Phone	54321543	Bob Simpson			303-555-1212
Name + Address	543958382	Tom Johnson	456 Elm Street, Denver CO 84834		
Phone Only					805-555-1212
Email + Zip			91362	ttoms@ascent360.com	