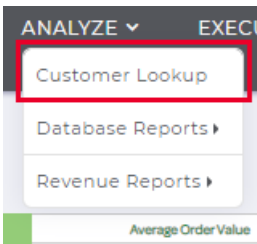


Customer Lookup

The Ascent360 Customer Lookup interface was updated and enhanced on August 9, 2021. Below you will find more information on how to navigate the new Customer Lookup to maximize your experience.

Accessing Customer Lookup

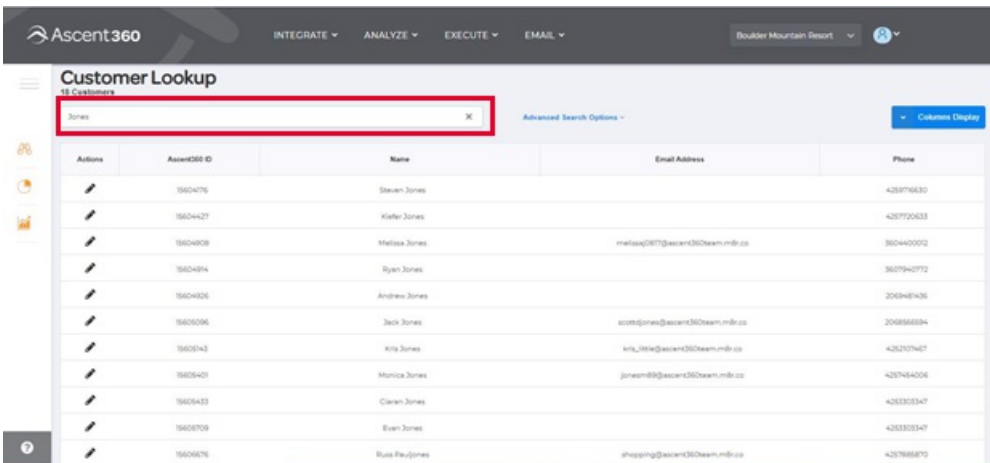
Customer Lookup is the first menu item in the Analyze menu.



Search Options

There are now two ways to search for customers in Customer Lookup.

1. **Basic Search** - The first search option is a basic search with a single field that allows you to search by first name, last name, email and Ascent360ID. Results will return exact and partial matches to your search term.



1. **Advanced Search** – This allows you to search by several fields within the CDP. You can enter search terms into multiple fields to refine your search. Results will match the terms you enter in each field.

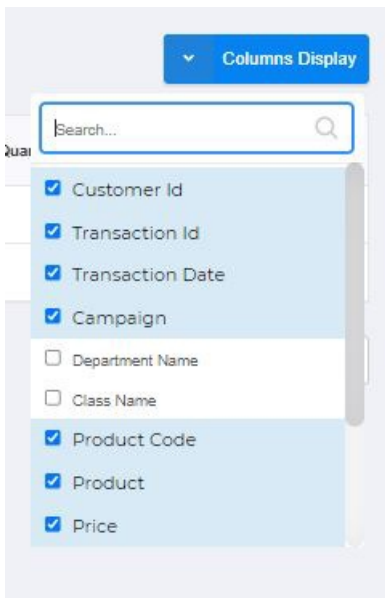
Search Results

After you search, results will be returned that match your search terms. A maximum of 500 results will be returned. You can see the number of results that match your terms under the Customer Lookup title in the upper left corner. If your results return more than 500 customers, it is recommended to refine your search using the Advanced Search Options.

Actions	Ascent360 ID	Name
	15604176	Steven Jones

Adjusting Columns

The column adjustments apply to the search results page and the Transaction, Email, Web and Additional Information Detail Pages. Essentially, any page that has a table format gives you the ability to adjust the columns that are displayed. Simply, click on Column Display in the upper right, then check or uncheck the boxes that correspond with the columns you want displayed.

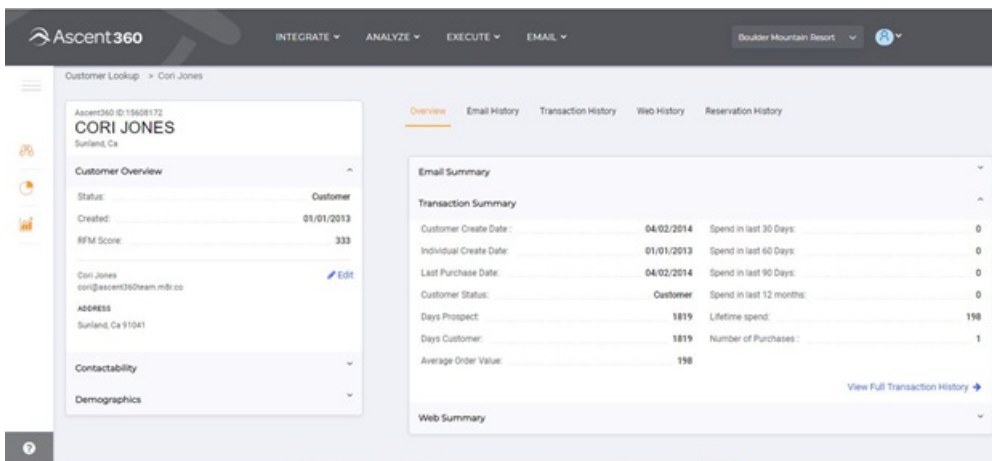


In the table of results, you can also adjust the width of the columns by hovering over the divider line in between the column names then clicking and dragging to adjust the width.

You can adjust the order of the columns by clicking and holding on the column name then dragging and dropping into the order you prefer.

Selecting a Customer & Viewing the Customer Overview

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.





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.


You can expand or contract different sections of the Customer Information using the up or down arrows for each section.

Customer Lookup > Cori Jones

Ascent360 ID:15608172
CORI JONES
Sunland, Ca

Customer Overview 

Contactability 

Demographics 

Gender: Female

Birthdate: 04/03/1961

Age Range: 55 - 59

Income Range:


Education:

Marital Status:

Presence of Children:

From the Customer Overview panel you can also edit customer information. If you click on the edit icon, it will open the Customer Edit window.


Ascent360 ID:15604908
MELISSA JONES
Colorado Springs, Co

Customer Overview 


Status: Customer


Created: 09/24/2012

RFM Score: 245

Melissa Jones
melissaj0817@ascent360team.m8r.co 

ADDRESS
Colorado Springs, Co 80906

Contactability 

Demographics 

The Customer Edit window allows you to update Customer Information in the same sections that are displayed on the Customer Overview. Use the arrows to open or close different sections.

AscentId: 15608172 ×

General Information ^

Name

Company Name **Email Address**

Phone Number **Prefix**

Address Information ^

Address

City **State** **Zip Code** **Country**

Personal Information v

Cancel

Email, Transaction, Web, and Additional Summary Sections & Detail Pages

On the right side of the Customer Overview page, you'll see sections for aggregated information on Email, Transaction, Web, Lodging or Other information that you have housed in your CDP. The additional section will vary based on the type of information you have in your database. In the example below, there is Reservations or Lodging information displayed.

Overview **Email History** Transaction History Web History Reservation History

Email Summary v

Transaction Summary ^

Customer Create Date :	09/24/2012	Spend in last 30 Days:	0
Individual Create Date:	09/24/2012	Spend in last 60 Days:	0
Last Purchase Date:	11/19/2014	Spend in last 90 Days:	0
Customer Status:	Customer	Spend in last 12 months:	0
Days Prospect:	2374	Lifetime spend:	448
Days Customer:	2374	Number of Purchases :	4
Average Order Value:	224		

[View Full Transaction History](#) →

Web Summary v

You can view each section by using the arrows to open and close sections.

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.

Overview | Email History | **Transaction History** | Web History | Reservation History

Email Summary [collapse]

Transaction Summary [expand]

Customer Create Date :	09/24/2012	Spend in last 30 Days:	0
Individual Create Date:	09/24/2012	Spend in last 60 Days:	0
Last Purchase Date:	11/19/2014	Spend in last 90 Days:	0
Customer Status:	Customer	Spend in last 12 months:	0
Days Prospect:	2374	Lifetime spend:	448
Days Customer:	2374	Number of Purchases :	4
Average Order Value:	224		

[View Full Transaction History](#) [arrow]

Web Summary [collapse]

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.

Similar to the search results table you can adjust the columns on these pages.

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

Ascent360 | INTEGRATE | ANALYZE | EXECUTE | EMAIL | Boulder Mountain Resort

Customer Lookup > Cori Jones > Transaction History

Transaction History

Search [input] [magnifying glass] [Columns Display]

Customer Id	Transaction Id	Transaction Date	Campaign	Product Code	Product	Price	Total	Quantity	Location
1576384	100609064	2014-04-02T09:06:00	13-14 Winter Season Passes	10893	Everyday Spring Pass w/M...	99	99	1	Location 4
1576384	100609064	2014-04-02T09:06:00	13-14 Winter Season Passes	10893	Everyday Spring Pass w/M...	99	99	1	Location 4

1 to 2 of 2 | Page 1 of 1 | 25

Navigating Customer Lookup

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 On Customer Lookup to return to the search page.

Customer Lookup > Melissa Jones > Transaction History

Transaction History

Search [input]

Customer Id	Transaction Id	Transaction Date	Campaign	Product Code
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