

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

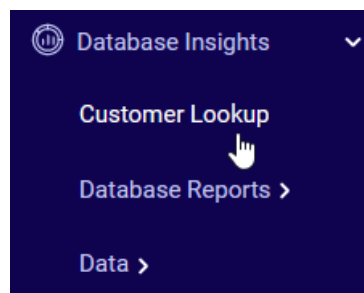
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Accessing Customer Lookup

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.



Additional Search Options ✕

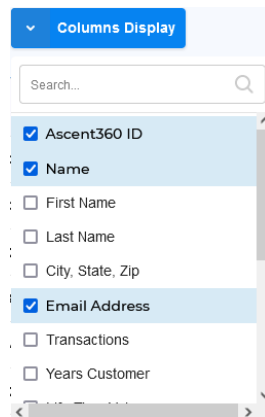
| | | | |
|--|--|--|---|
| First Name <input type="text"/> | Last Name <input type="text"/> | Email Address <input type="text"/> | Phone Number <input type="text"/> |
| Serial Number <input type="text"/> | Brand <input type="text"/> | Address <input type="text"/> | City <input type="text"/> |
| State <input type="text"/> | Zip Code <input type="text"/> | Ascent360 ID <input type="text"/> | |

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.



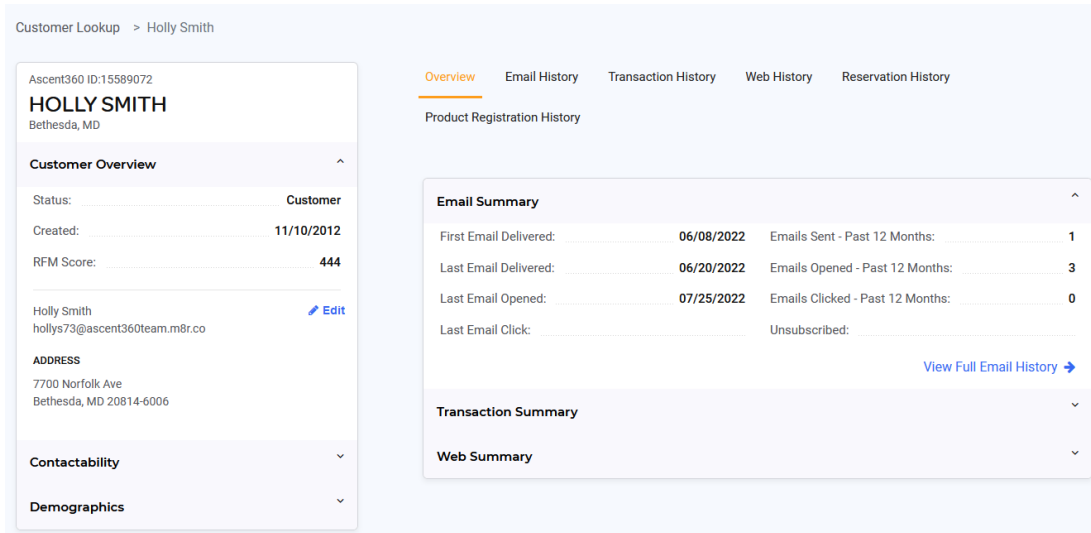
- Adjust the column width on the results table by hovering on the dividing line between columns and clicking & dragging.
- Click and drag any column header to reorder the column display.
- Click any column header to sort results ascending or descending.

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

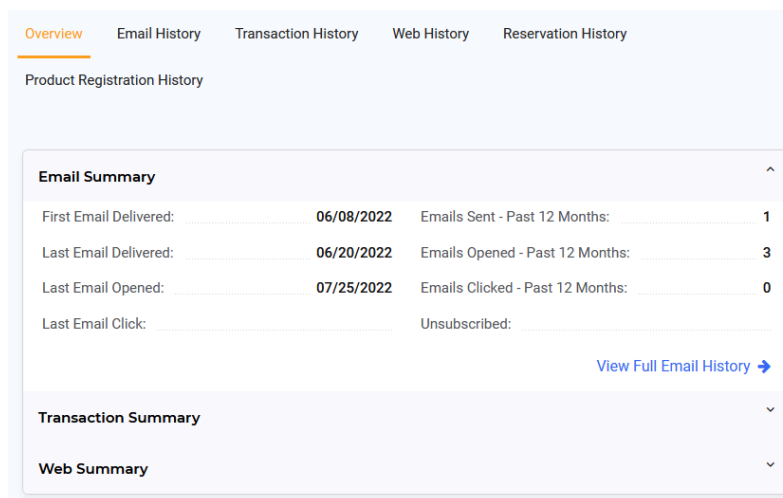
Once your search results are returned, you can view details of a specific customer from the list of customers returned by the search. To select a customer from the list, click anywhere on the row that corresponds to the customer. The **Customer Overview** page will open.



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.



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.

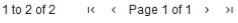

Search these pages for specific transactions or interactions utilizing the search bar at the top.


Customer Lookup > Holly Smith > Transaction History

Transaction History

Search  [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