

Search and User Detail

The search function allows you to locate and display individual user records.

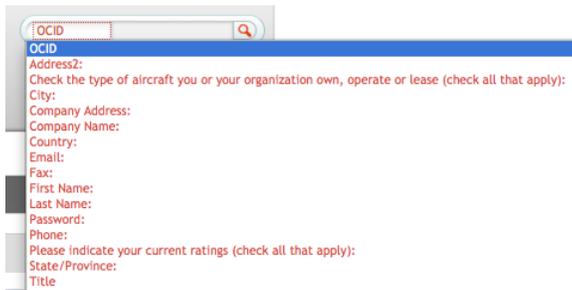
User Detail contains all transaction information relating to a record: demographic data and history; subscription data and history; and trends in web activity, ad activity, and newsletter activity.

SEARCH



The Search and Advanced Search feature is found in the upper right-hand corner of the nav bar.

Simple Search



You can search for a user record by any one demographic using the drop-down menu in the search bar. The demographics listed in the drop-down are pulled from all of your questions/data fields created using the Question Builder tool.

The default search setting is OCID.

If you know the OCID of a user, it is the most efficient way to search, as only one search result will be displayed: that for the record with that OCID. (See below.)

Search Result Found : 1

| Action | OCID | First Name | Last Name | Title |
|----------------------|------|------------|-----------|-------|
| Edit | 89 | | RANDALL | |

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The fields that are displayed in the search results – in this case, FIRSTNAME, LASTNAME, TITLE – are configurable in the Config Manager.

If you don't know the OCID of a user, you may search by any other demographic. Searching by another demographic, e.g. last name, will often produce multiple search results, as shown below.

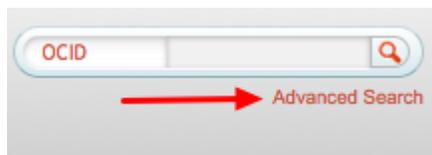
Note that when searching by demographic, e.g. last name, the results will yield all names that *contain* your search query. For example, if you search by Last Name for "Avila", the results will include *Avila*, *D_avila_*, *_Avila_Salazar*, *__H_avila_nd*, etc. (See below.)

Search Result Found : 157

| Action | OCID | First Name | Last Name | Title |
|----------------------|--------|------------|----------------|-------|
| Edit | 1 | | AVILA | |
| Edit | 29633 | | OSWALD RENDANO | |
| Edit | 28817 | | AVILA | |
| Edit | 28625 | | AVILA | |
| Edit | 28623 | | AVILA | |
| Edit | 28641 | | AVILA | |
| Edit | 150329 | | COLLAZO-DAVILA | |

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Advanced Search



Search all documentation:

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Clicking on "Advanced" will open the Advanced Search window, as shown below.

In Advanced Search, you can search records using multiple demographic fields, e.g. by First Name and Last Name and Zip Code. You may still get multiple results, but they will be fewer than by searching by, e.g. Last Name alone.

When using Advanced Search, demographic options are **IS**, **IS NOT**, **CONTAINS**, **DOES NOT CONTAIN**. **IS** = The results will only contain the EXACT value entered, e.g. entering "Last Name IS Mac" will produce results only with the last name "Mac".

IS NOT = The results will contain all records EXCEPT those with the exact value entered, e.g. entering "Last Name IS NOT Mac" will return all records with any last name but "Mac".

CONTAINS = The results will contain the value entered, e.g. entering "Last Name CONTAINS Mac" will produce results that may be McCor_mack, _Mac_k, _Mac_Gregor, Camac_ho, etc.

DOES NOT CONTAIN = The results will contain all records EXCEPT those that contain the value, e.g. entering "Last Name DOES NOT CONTAIN Mac" will return all records that do not have "mac" anywhere in the last name field. So, all records EXCEPT McCor_mack, _Mac_k, _Mac_Gregor, Camac_ho, etc. will be returned in the search results.

Note that for select-type questions, you select from a drop-down menu in the value field. (See below.)

When search results are returned, click on "Edit" to edit demographic information or on "View" to view User Detail.

| Action | OCID | First Name | Last Name |
|--------|------|------------|-----------|
| | 1 | VICTOR | AVILA |

Edit Demographics

Subscription Activity displays a full audit trail of subscription activity on all products where there has been activity, including:

ID - This is the transaction ID number. Clicking on this number will open a pop-up showing either the form completed for that transaction or data imported via an import.

TERM - This is the product term that the activity is connected to. For more on products and terms, see Quick Start Guide - Products and Resources.

REQUESTED - This is the request date. If a request date isn't set during an import, the request date will be the same as the transaction date. For online subscriptions via form, the request date will be the same as the transaction date.

TRANSACTION - This is the date and time the transaction occurs and is recorded in the ONEcount system, whether it be an import, administrative subscription/renew/unsubscribe, or online subscription/renewal/unsubscribe.

PRODUCT STATUS - This is the Product Status assigned for a subscription/renewal/unsubscribe. Product Statuses are created in the INVENTORY module and attached to product terms.

QTY - This is the quantity as defined in the product terms.

PRICE - This is the price as defined in product terms.

IP - This is the IP address where the transaction occurred.

SOURCE CODE - This is the source code applied to the transaction

SUBSCRIPTION STATUS - This is the status of the subscription, i.e. New, Renew, Unsubscribe.

MEDIA - If there is a media file path associated with this record, it will appear here. Paths to media files may be included in imports. Those files are accessible here if there's a path in this column.

REMARKS - The source of the transaction will appear here and indicate if the transaction occurred because the USER SUBSCRIBED, USER RENEWED, was imported, etc.

Note the Expiration date in the upper right-hand corner of each product heading.

Demographic Activity Tab

| Subscription Activity | Demographic Activity | Web Activity | Ad Activity | Registration Activity |
|--------------------------------|----------------------|--------------|-------------|-----------------------|
| Demographic Activity | | | | |
| Tuesday, 12/23/2014 14:01:58 | | | | |
| Tuesday, 12/23/2014 13:59:07 | | | | |
| Tuesday, 12/23/2014 13:56:16 | | | | |
| Monday, 12/01/2014 09:31:36 | | | | |
| Wednesday, 10/29/2014 10:00:06 | | | | |

A history of all demographic changes is displayed here. Clicking on the magnifying glass will bring up demographic information as of that day. (See below.)

| Question | Response |
|--|---------------------|
| First Name | Orish |
| Last Name | Shrestha |
| Specialty | Allergy |
| Medical Profession - Allied Health | Other Allied Health |
| State | N/A |
| Zip/Postal Code | 33159 |
| Country : | Bahamas |
| Medical Profession | Physician MD |
| Year of Graduation from Medical School | 2010 |
| ... | ... |

Web Activity Tab



The X axis displays dates of page views. The Y axis scale is the number of page views.

Note that hovering over a data point will bring up a crosshair and display the date and count in the lower right-hand corner of the chart. Dragging a crosshair around a data point then releasing will drill down further, as shown below.



Ad Activity Tab



The X axis displays dates of banner views.
 The Y axis scale is the number of banner views.

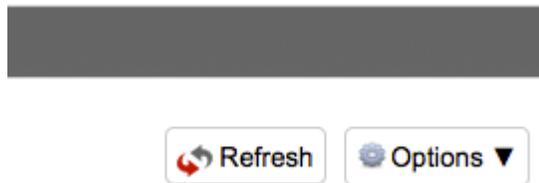
Note that hovering over a data point will bring up a crosshair and display the date and count in the lower right-hand corner of the chart.
 Dragging a crosshair around a data point then releasing will display an hourly chart for that day, as shown below.



Newsletter Activity Tab

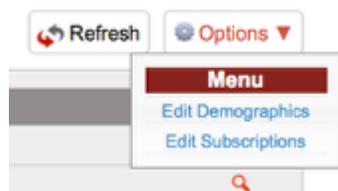


OPTIONS AND REFRESH



Options and Refresh are located in the upper right of the User Detail page, directly above User Products.

Select "Options" to edit demographic information or subscriptions.



Edit Demographics will open the Edit Demographics pop-up where you can add/edit any demographic information, click "Update" then "Close". (See Image 1 below.)

Edit Subscriptions will open the Edit Subscription pop-up where you can Subscribe/Renew/Unsubscribe the user from any products, click "Update" then "Close". (See Image 2 below.)

Edit Demographics - Account ID :: 9

Image 1

[Update](#) [Close](#)

Please indicate your current ratings (check all that apply):

- ATP
- Comm-Multi-Inst
- Private-Inst
- Helicopter
- CFI or CFI
- A&P
- No current pilot or mechanic license

Which of the following best describes your involvement in the decision to purchase a product/service?

- Design
- Specify
- Purchase
- Approve
- Recommend
- Evaluate
- Not involved

Check the type of aircraft you or your organization own, operate or lease (check all that apply):

- Jet
- Turboprop, multiengine
- Turboprop, single engine
- Piston, multiengine (over 5000 lbs.)
- Piston, multiengine (under 5000 lbs.)
- Piston, single engine
- Helicopter, turbine
- Helicopter, piston
- None

Which category best describes your company's primary business?

Corporate/Executive Flight Opera -

Which category best describes your title?

Captain -

Email:(ALL)

Username:(ALL)

A0000014

Password:(ALL)

BLAKEJ#A0000014

First Name:(ALL)

ROBERT KELLY

Edit Subscription - Account ID :: 9

Image 2

[Refresh / Close](#)

| Product: Aviation Brief | Package | Price | Expiration Date | Subscription | Current Status |
|-------------------------------------|---------|-------|-----------------|---------------------------|----------------|
| Bi-weekly Aviation Brief Newsletter | | \$0 | N/A | Subscribe | N/A |

| Product: Aviator's Guide Print Subscription | Package | Price | Expiration Date | Subscription | Current Status |
|--|---------|-------|-----------------|-----------------------------------|--------------------|
| Aviator's Guide Qualified Print Subscription | | \$0 | 08/29/2017 | Renew/Unsubscribe | Qualified Non Paid |
| Aviator's Guide Non-Qualified Print Subscription | | \$500 | N/A | Subscribe | N/A |

| Product: Avionics Monthly | Package | Price | Expiration Date | Subscription | Current Status |
|-----------------------------|---------|-------|-----------------|---------------------------|----------------|
| Avionics Monthly Newsletter | | \$0 | N/A | Subscribe | N/A |

If a user is currently subscribed to a product term, you can select Renew or Unsubscribe in the Subscription column.

If a user is currently not subscribed to a product term, you can select Subscribe in the Subscription column.

Select "Refresh" to update User Detail after editing demographic and/or subscriptions data.