



Customer Split: What it Means to You

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Customer Split: What it Means to You

The customer record split in The Edge v. 17.3 means better control over spouse/partner record management.

Some things will stay the same:

- Couple records will still be linked
- Both customer and spouse/partner will show on each other's **Customer Edit ► General** tab
- Both customer and spouse/partner can be reported together

But now all of this can happen separately as well! Transactions will be tracked according to the individual who conducted it, but you'll have choices about how that reports out.

This document outlines what happens to customer records and things you may want to do to make the most of the upgraded database. It also details what these changes mean to the functionality of The Edge and what actions you should take. The good news is that there is very little for you to do except be aware of new options and use them sensibly. We will cover the following:

- What's happening behind the scenes
- New **System Options** and how they impact your transactions
- What you should do to prepare
- Working with spouse/partner records
- **Find Customer** options and how they impact transaction recording
- Accounts and statements
- Other affected areas of customer history and activity records

This table contains a summary of changes to specific areas within The Edge. These items are detailed in the section entitled **Affected Areas of The Edge**.

Area	What to Look For
General	<ul style="list-style-type: none"> • Previous transactions will be assigned to either the individual ID who was on the transaction or, in the case of the couple, the primary ID. If a transaction has only the spouse/partner's name, those transactions will be assigned to the spouse/partner only. • To create a spouse ID, during the database upgrade, The Edge will add 1,000,000 to the ID. In that case, a customer ID of 001-00010 will be 001-100010. • Going forward, customers brought up as Couple will have transactions assigned to the primary ID; those brought up as Individual will have transactions assigned to the individual's ID. • Going forward, when adding them for the first time, spouses will be assigned the next available sequential ID.
Point of Sale	<ul style="list-style-type: none"> • Use the Find Customer function to locate the individual or couple and assign transactions. • Customer data such as number of items sold, price of items, etc., shown at point of sale in the customer window is blended and includes the totals for both parties in the couple.

Accounts and Statement Balances	<ul style="list-style-type: none"> House accounts are blended and reflect charges, payments, and returns made by either party. Statements are blended and will reflect all activity for both parties. Separate statements will no longer be sent. If you want separate statements, the couple will have to be split into two separate accounts. You'll be able to toggle between individual and spouse/partner, but for the Balances tab, you will see the blended balances, with the exception of gift certificates.
Customer Edit Activity Tab	<ul style="list-style-type: none"> Spouse/partner records are highlighted in blue. Activities are broken down by individual or couple according to options on the screen.
Repairs/Services/Special Orders/Layaways	<ul style="list-style-type: none"> Pickups and payments can be made by either party. There is a POS system option ("Show Only Selected Customer's Services") that controls how services are displayed for linked accounts.
Gift Certificates	<ul style="list-style-type: none"> Gift certificates will apply only to individuals.
Tender Cards	<ul style="list-style-type: none"> Blended for use by either party.
Returns	<ul style="list-style-type: none"> Returns can be made by either party in a couple account.
Credit Memos	<ul style="list-style-type: none"> Credit memos will apply account-wide and can be used by either party.
Wish Lists	<ul style="list-style-type: none"> Wish list entries are visible at POS for either account. TIP! Be sure notifications go to the desired individual contact method.
Rewards/Referrals	<ul style="list-style-type: none"> Will work like house accounts: Rewards accounts will be blended onto one card/account. For couples who had separate rewards/referral cards, the credits will be blended onto the first card presented.
Postcards	<ul style="list-style-type: none"> Check your presets for auto postcard mailing. Saved lists preserve their data.
Customer Edit Options Tab	<ul style="list-style-type: none"> Options are assigned to the couple. The exception is tax exemption, which must be handled on the individual record.
Customer Edit Notes Tab	<ul style="list-style-type: none"> Notes will be blended to appear at point of sale for either party.
Customer Edit Pop-Ups Tab	<ul style="list-style-type: none"> Pop-ups belonging to the couple will be assigned to the primary ID and will appear at point of sale for either of the couple. Going forward, they will be assigned according how the account was brought up: individual or account.

More about some of these changes can be found in the section entitled Affected Areas of The Edge. But first, we'll explain how the customer split works.

Behind the Scenes

Here is what is happening behind the scenes during that database upgrade: The Edge looks at all combinations of customers with a linked spouse/partner record. Then it takes the existing customer ID of the first spouse/partner in the record and makes it the primary ID. For any records with a non-blank spouse first or last name, it creates a new record and ID with the appropriate details from the original record. Then it goes back the original record and strips out data except the spouse/partner's ID so they will link and appear in the customer record. If there are spouse/partner fields but no name, that data will be saved in the **Notes** tab of the primary record. Any data labeled "Home" or specifically with the spouse/partner's name will be copied over, marking it "Preferred" if marked as such in the initial record. Finally, it links the two records so you can work with them as a couple if you wish.

For the purposes of sales history and transaction tracking, you may remember that when doing a customer find, you could always find the couple or the individual. This information is important for transaction history. What will happen during customer split is if a transaction was conducted as individual, The Edge will assign transactions to the new IDs as appropriate. If "couple" was selected, The Edge will assign the transaction to the history of the primary ID holder. All customer tables will be updated accordingly.

System Options

Fast Customer Find Preferred Contact Methods Only

When using the fast customer find at POS, whether to return only preferred contact methods. True returns only preferred contact methods; False returns all matching contact methods. The Edge default is True.

Fast Customer Find Return Options

When searching using the fast customer find at POS, the results that will be returned. Options include:
Individual: Returns only matching individual records
Couple: Returns matching records from either individual in the couple.

Fast Customer Find Starting Field

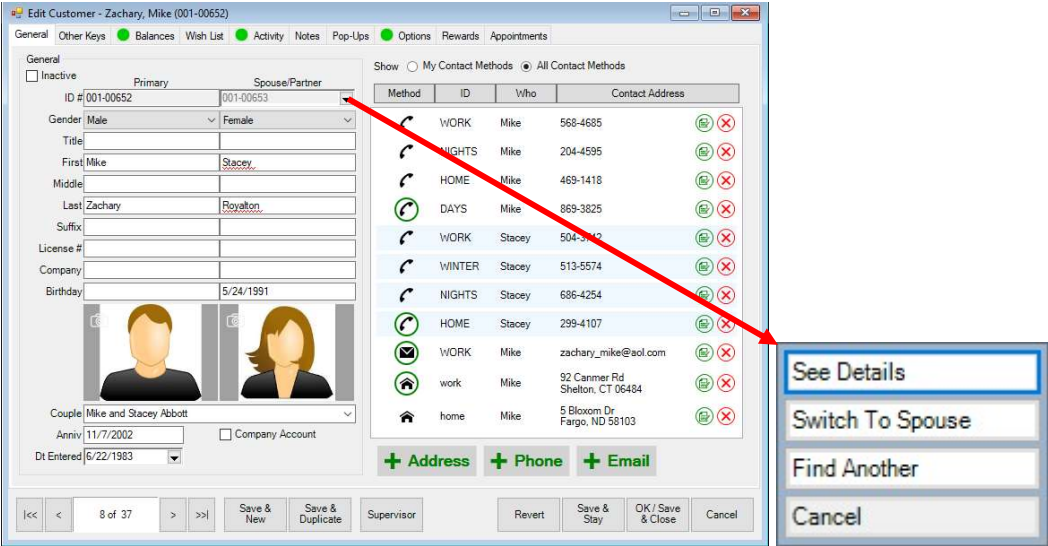
When searching using the fast customer find at POS, what should be the default starting field, i.e., cursor placement. Options include:
Last name
First name
Phone
Email.

Show Only Selected Customer's Services

Controls how layaways, special orders, repairs, and custom jobs will appear in the Payment and Pick Up screens for customers with link accounts:
True: Only display this customer's available service transactions for payment and/or pick up
False: (Default) Display customer & spouse/partner's available service transactions for payment and/or pick up

Working with Spouse/Partner Records

In the Customer Edit window, General tab, there is a drop-down menu for the spouse/partner. This menu contains options for working with the spouse/partner record.



Options in the **Spouse/Partner** drop-down menu include:

- See Details** Opens the customer record with the spouse/partner on the left and focuses the data on that individual account.
- Switch to Spouse** Reverses the customer record with the spouse/partner as the primary.
- Find Another** Allows you to attach another customer record as the spouse/partner.
- Cancel** Cancels out of this menu and returns you to the **Customer Edit** window.

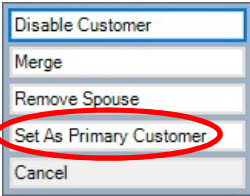


If the spouse/partner fields for first and last name are not populated, The Edge will not save the spouse/partner record.

Set as Primary Customer

If you wish to change which spouse is the primary:

1. Use **Switch to Spouse** from the **General** tab to change focus on the **Spouse/Partner**, which also moves that person to the left side of the **General** tab.
2. From the **Supervisor** menu, Select **Set as Primary Customer**.

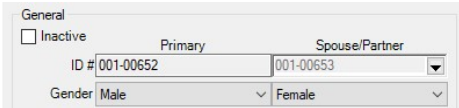


If you do this, it changes the account number of the primary account. This is generally only applicable in searches and statements.

Unlinking Spouse/Partner Records

In the event a customer wants to unlink a spouse/partner record:

1. Find the customer record from which you want to unlink.



2. From the linked **Customer Supervisor** menu, menu, select **Remove**.
3. The linked **Spouse/Partner** will be removed but both customers will be kept as an individual customers.



When separating a couple record, all transactions to date will be assigned to the primary ID holder.

Find Customer Options and Results

Using the Results Tab

The **Results** tab of the **Find Customer** function has always been a powerful feature for indicating how to present results records: couples, individuals, spouses/partners, etc. But until now, the **Results** tab only refined results of the addressee field for the purposes of how names appeared.

Now there is a change: The **Results** tab selections actually dictate how sales and other transactions are assigned at point of sale and tracked in history, accounts, and reporting. For example, if you bring up a customer as a **Couple**, the transaction will be assigned to the primary ID, regardless of who is standing in front of you. If you bring up a customer as **Individual**, the transaction will only be tracked on his or her customer record.

Addressee

Primary Contact	Records will be labeled with the primary account holder's contact information.
Spouse/Partner	Records will be labeled with the spouse/partner's contact information.
Birthday Celebrant	Returns the name of the birthday celebrant regardless of whether they are the primary contact or spouse on the customer record.
Celebrant's Spouse/Partner	Returns the spouse/partner of the birthday celebrant regardless of whether they are the primary contact or spouse on the customer record.
Male	Returns only male customers.
Female	Returns only female customers.
Couple	Returns results matching both the primary and the spouse/partner as one record and assigns the transaction to the primary ID. The name on the receipt and other documents will be shown as a couple.
Each Individually	Returns records matching any information in any record regardless of whether it is primary or the spouse/partner. Transactions using this result will be assigned to the individual's ID.



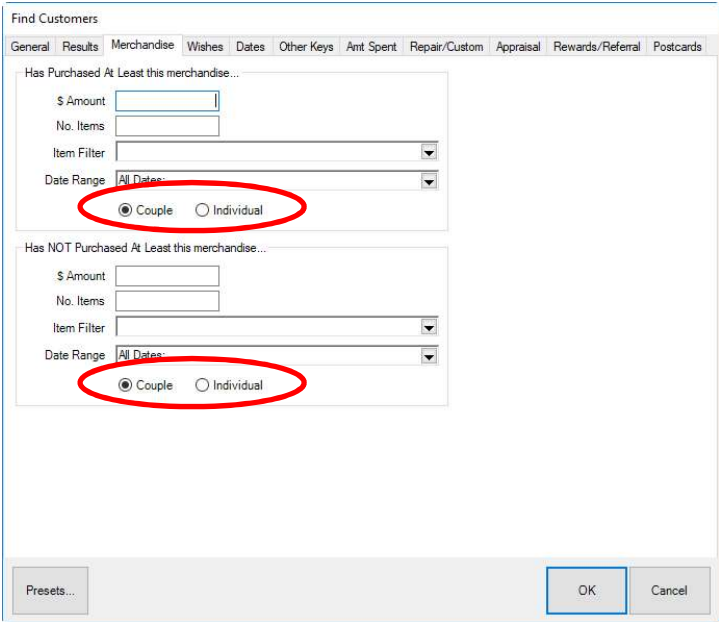
We recommend that you check your Find Customer presets. The default is to sort by customer ID; you may wish to change it to sort by last name. The reason is that after customer split, the new spouses have IDs that can be a very different from the primary ID; so when sorted by ID, it would put the spouse/partner very far down the list from the primary.

Couple and Individual Search Options

Now the option to search for records including couple or individual is available in the **Find Customer** function on the **Merchandise**, **Amount Spent**, **Repair/Custom**, and **Appraisal** tabs. The option appears toward the bottom of the window.



In these tabs, the couple/individual option is not about assigning the transaction, but it is designed to help you specify what to include in the search parameters.



- Couple** Returns records in which the purchases of both the customer and spouse/partner are included in the query.
- Individual** Returns records in which only the purchases of the individual customer are included in the query.

Depending on the tab, the option may appear as above and in the reverse, such as on the **Amount Spent** tab:

Has Spent This Much...

\$ Amount Exclude House Account

Date Range All Dates:

Couple Individual

Has NOT Spent This Much...

\$ Amount Exclude House Account

Date Range All Dates:

Couple Individual

Couple Returns records in which the purchases of both the customer and spouse/partner are included toward the specified amount.

Individual Returns records in which only the purchases of the individual customer are included toward the specified amount.

POS Find Customer

At point of sale, by default, **Find Customer** uses a more streamlined search window. Like the **Results** tab in the larger **Find Customer** window, there is an option to return records based on the couple's or individual's ID and have transactions assigned accordingly. At point of sale, if you search by couple and select a record from those results, the transaction will go to the primary ID.

Make sure your associates understand their responsibility to confirm, at each encounter, basic customer data such as address, email address, and telephone number. They should take a moment to ensure that transactions goes with which record: customer, spouse/partner, or couple.

Find Customer

Last Name

First Name

Phone #

Email Address

Results Individual Names Couple's Name

Contact Results Preferred Only Show All

More...

- **Results** lets you tell The Edge to look for only individual names or couples' names. As mentioned above, the type of result record, individual or couple, will dictate to whom the transaction is assigned. If you select **Individual Names**, the results will list all the records as individuals. **Couple's Names**, the transaction will be assigned to the couple using the primary ID. The default selection is selected in **System Options**.
- **Contact Results** indicates whether to show only preferred contact methods or all in the results. This overrides the **System Option**.



Remember that from POS, you can use the Contact Methods button to quickly manage phone, address, and email contacts for this customer and their spouse.

Affected Areas of The Edge

This section describes what to look for as your work with your customer records in many areas of The Edge.

General

As mentioned in the introduction, it's important to understand how transactions are assigned to customer IDs.

- Previous transactions will be assigned to either the individual ID who was on the transaction or, in the case of the couple, the primary ID.
- Going forward, customers brought up as *Couple* will have transactions assigned to the primary ID; those brought up as *Individual* will have transactions assigned to the individual's ID.

Point of Sale

As you know, the **Customer** area of the **Point of Sale** screen contains history information beneath his or her name and address. From now on, that data will be blended to include the totals for both parties in the couple.

Customer #001-00003				
Mr. Joseph Carrano				
342 West Carlson Ave				
Stratford, CT 06615				
203 567-9876				
Do Not E-mail				
1	990	5	250	08/2002
A	B	C	D	E

The following details are shown for returning customers:

- A Total number of items ever purchased from your store.
- B Total price of all items purchased from your store.
- C The number of transaction with your store.
- D Total amount tendered with your store.
- E The date this customer was entered into The Edge.

Accounts/Statements and Balances

House Accounts and Statements

Charges to house accounts are assigned according to how the transaction is made at point of sale. Customers brought up as *Couple* will have transactions assigned to the primary ID; those brought up as *Individual* will have transactions assigned to the individual's ID.

When it comes time to bill those charges, house accounts and other statement balances will always be blended. That means that when house accounts and aging close at the end of each month, any charges and payments made to those accounts will be posted to the primary ID and therefore be reflected on the couple's statement.

Of course, individuals without a linked account or spouse/partner on record will be treated individually.

Balances Tab

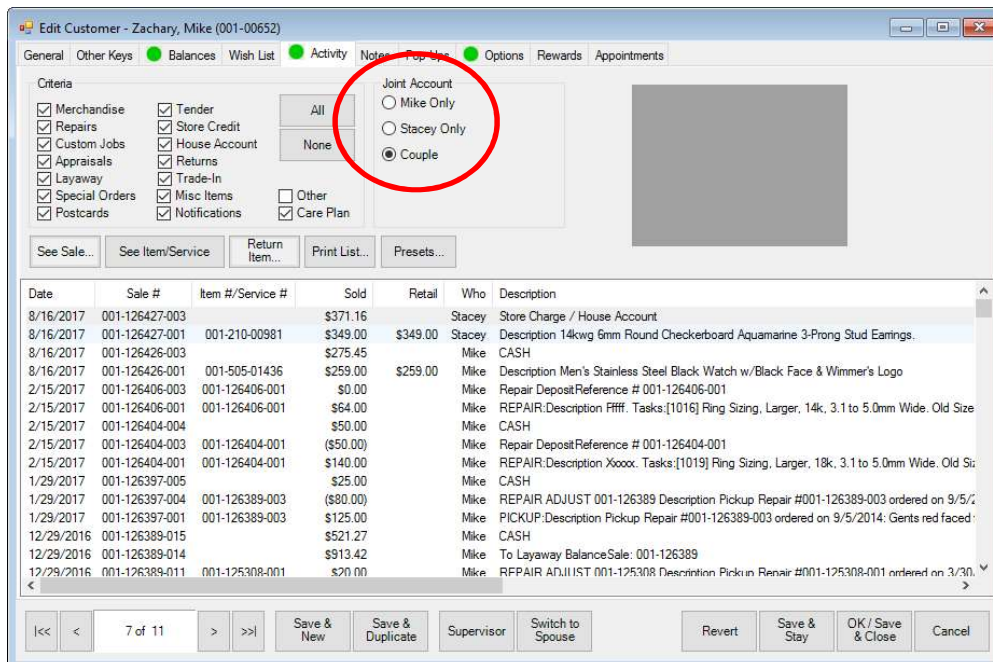
The **Customer Edit Balances** tab lists a customer's various account balances: store charge, layaways, credits, etc. Like that of transaction records, transactions charged to a couple's record will be assigned to the primary ID. Transactions charged by an individual will be blended for both parties.

Customer Edit Activity Tab

As you know, when The Edge records a transaction, it includes a field for the customer involved. This information is recorded both in the customer's activity history (**Activity** tab) and, therefore, the item record (**History** tab). Historically, it was possible for a sale to be made as a "couple." If that was the case, during customer split, the transaction will be assigned to the primary customer record and tracked in the customer's **Activity** tab and the item's **History** tab.

As mentioned previously, going forward, the way you search and bring up the customer record will determine how the transaction is saved: If the transaction was conducted individually by the customer or the spouse, that transaction will be assigned to the specific individual's ID. If the transaction was done as couple, the transaction will be assigned to the couple, i.e., the primary ID.

The **Activity** tab has the option to include the selected customer, the spouse/partner, or both as a couple. For those accounts where **Couple** is selected, we have added the feature that highlights spouse/partner activity in light blue.



Repairs/Custom Jobs/Services/Special Orders/Layaways

During the split, repairs, custom jobs, special orders, appraisals, custom jobs, and layaways taken in before the split will be found under the ID of the original transaction.

Going forward, repairs, special orders, appraisals, custom jobs, and layaways will be assigned at point of intake to the customer ID according to how the record was brought up during **Find Customer**. If brought up at point of intake as a couple, the transaction will be assigned to the primary ID. If brought up at point of intake as an individual, the transaction will be assigned to the individual ID.

As far as payments and pickups, payments can be made by either party and credits will be blended when appearing on statements. The system option “Show Only Selected Customer’s Services” controls how payments & pick ups are displayed at POS.

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///C:/Users/Gary/Desktop/Customer%20Statements.pdf

TPW The Original
500 Commons Way
Bridgewater, NJ 08807
(516) 999-8888

From: 7/16/2017
Through: 9/15/2017
Printed: 8/22/2017

Scott George
190 Greenway Street
Hamden, CT 06517

Scott George (001-06941)

From: 7/16/2017
Through: 9/15/2017
Printed: 8/22/2017

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Date	Receipt#	Detail	Amount
		Repair #001-00420-001	
		Test1. Declared value: \$100.00. Tasks:test1.	
08/22/2017	001-00420	Repair Intake (Includes Estimated Taxes)	117.00
08/22/2017	001-00420	Deposit	0.00
08/22/2017	001-00421	Picked Up (Paid by Samantha George)	-117.00
		Total Estimated Due at Pick Up	0.00
Total Estimated Account(s) Balance Due			0.00

The dates used to print this Statement do not conform to the current closing dates.



Reports related to these transactions are blended to reflect transactions for both parties in the couple.

See the section entitled House Accounts and Statements for a related discussion.

Returns and Credit Memos

Returns are generally queried by item history either from the customer record or at point of sale, so finding and returning the item will not be affected by the split.

However, house account credits resulting from a return will be credited to the blended couple account.

Credit memos resulting from returns will be applied account-wide.



Credit memos are essentially a store credit and are issued to individuals and remain on individual accounts.

Wish Lists

Wish list items created before the split will be found under the primary ID of the original transaction.

However, when the associate brings up wish lists at point of sale or in the customer record, all wishes for both parties will appear.

Take care that notifications for wishes are assigned to couple or individual records correctly using the correct **Find Customer** settings.

Appointments

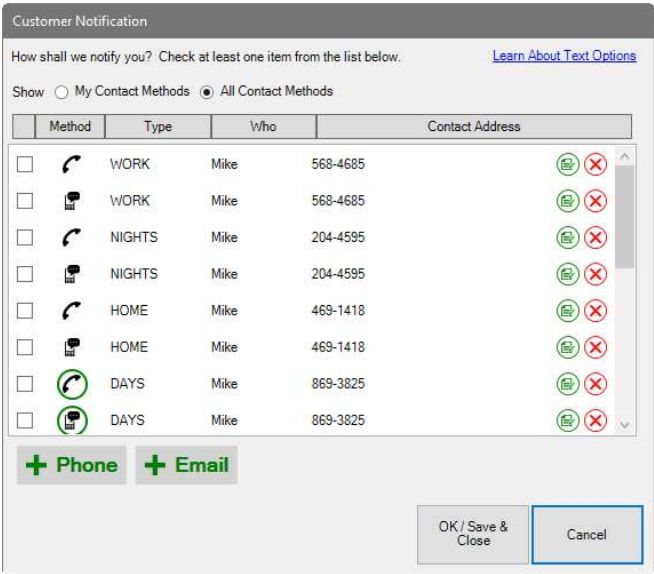
Appointments made before the split will be found under the primary ID of the original transaction.

After the split, appointments are assigned according to the couple (primary) ID holder or the individual ID as determined by using the *Couple* or *Individual* options in **Find Customer**.

However, when the associate brings up appointments at point of sale or in the customer record, all appointments for both parties will appear.

Notifications

When working in service, appraisal, or custom job intake, there is a **Notify** option that allows you to select the best way to let the customer know when the order is complete. When you select that option, the **Customer Notification** window will appear.



The contact methods and values from which to select will be shown according to the couple (primary) ID holder or the individual ID as determined by using the *Couple* or *Individual* options in the initial **Find Customer** for the transaction intake. Notice that you can also narrow results to only show preferred contact methods.



When you choose a different contact method other than the default, that is the contact method that will appear in the transaction record.

Select the contact method for the individual to whom the notification should go. For more about contact methods, see the tip sheet entitled TIP-2017-094, Customer Contact Methods.



Working with notifications at point of sale is a natural opportunity to verify customer data.

Other Areas of Customer Records

Customer Edit Notes Tab

Notes made before the split will be found under the primary ID of the original transaction.

After the split, notes will be assigned according to the couple (primary) ID holder or the individual ID as determined by using the **Couple** or **Individual** options in **Find Customer**. However, the associate will see all notes associated with the couple.

Customer Edit Options Tab

Options set made before the split will be found under the primary ID of the original transaction.

With the exception of tax exemptions, after the split, options are set to apply to both parties in the couple. When working with tax exemptions, be sure to locate the record using the **Individual** option in **Find Customer**.

Best Practices

It is always a good idea to confirm information with customers at point of sale. It ensures good data and establishes a rapport with the customer. Now would be a good time to reinforce this habit with your entire staff.