THE EDGE®

Customer Contact Methods

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Customer Records

Starting with The Edge v. 17.3, there is a slightly different look and feel in managing customer contacts.

Let's take a moment to review the **Customer Record ▶ General** tab. Containing the basic contact information about the customer, the **Edit Customer** window will open with the **General** tab open.

> **Note!** The primary customer is on the left and the spouse/partner is on the right. If you use Switch to Spouse, primary and spouse/partner keep the same relationship but the data views change. To actually change who is primary, go to the Supervisor menu and select Set as Primary Customer.

Fields and options in the **General** tab include:

General

Inactive	Indicates whether the customer has been marked inactive.
ID #	The customer's/spouse's Edge identification number.
Gender	Indicate the gender of the customer/spouse.
Title	Specify a title for the customer/spouse.
First/Middle/Last	Specify the customer/spouse name. If the first and last name fields for the spouse/partner are not completed, The Edge will not create a spouse/partner record.
Suffix	Specify a suffix for the customer/spouse (Jr., Sr., etc.)
License	Specify the customer's/spouse's license number.
Company	Specify a company name for this customer record.
Birthday	The customer/spouse birthday.

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Camera icon (📷)	Returns photo menu to capture an image of the customer as described in the section entitled Adding and Managing Photos.
Couple	Defines how to display the customer and their spouse on receipts and mailings.
Anniv	The customer's wedding anniversary.
Company Account	Indicates whether this is a corporate account.
Date Entered	The date the customer was entered.
Contact Methods	Lists contact methods for both the customer and any linked spouse/partner records. You can show:

My Contact Methods: Those for just the customer

All Contact Methods: Those for the customer and any linked records.

Method	Type	Who	Contact Address		
☎	WORK	Mike	568-4685	🖥	⊗
☎	NIGHTS	Mike	204-4595	🖥	⊗
☎	HOME	Mike	469-1418	🖥	⊗
⊘	DAYS	Mike	869-3825	🖥	⊗
☎	WORK	Stacey	504-3742	🖥	⊗
☎	WINTER	Stacey	513-5574	🖥	⊗
☎	NIGHTS	Stacey	686-4254	🖥	⊗
⊘	HOME	Stacey	299-4107	🖥	⊗
✉	WORK	Mike	zachary_mike@aol.com	🖥	⊗
🏠	work	Mike	92 Canmer Rd Shelton, CT 06484	🖥	⊗
🏠	home	Mike	5 Bloxom Dr Fargo, ND 58103	🖥	⊗

In the list of available contact methods, fields include:

Method: The contact method, i.e., phone, email, etc.

**Type**: Where the person will be reached, i.e., home, work, etc.

Who: Whether it goes to the primary contact on the record or the spouse/partner.

Contact Address: The specific value.

> - **Contact methods circled in green are the preferred contact number for each contact method.**
> - **When you choose a different contact method other than the default, that is the contact method that will appear in the transaction record.**
> - **If a contact method is the same for both parties, there is no option to remove a party in the edit window. To remove that contact from the record, use the Delete icon.**

To edit a contact method, select the green edit button (🖥).

To delete a contact method, select the red delete button (⊗).

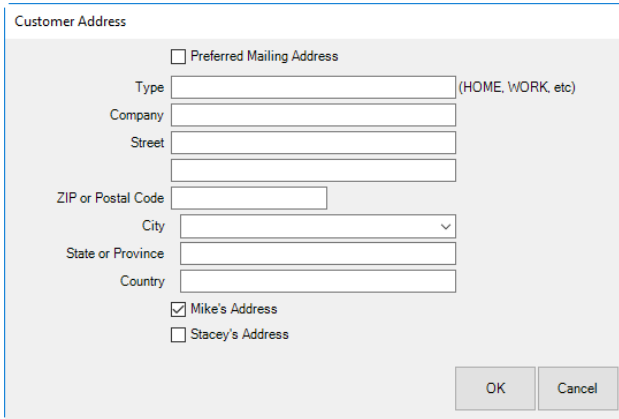|	
+ Address	Offers the add **Customer Address** window where you can add a new address. For more information, see the section entitled Adding a Customer Address.
+ Phone	Offers the **Customer Phone Number** window where you add a new phone number. For more information, see the section entitled Adding a Customer Phone Number.
+ Email	Offers the **Customer Email** window where you can add a new email address. For more information, see the section entitled Adding a Customer Email Address.

Adding a Customer Address

To add a customer address:

1. From the **Customer Edit General** tab, select +**Address** (**+ Address**). The **Customer Address** window will appear.
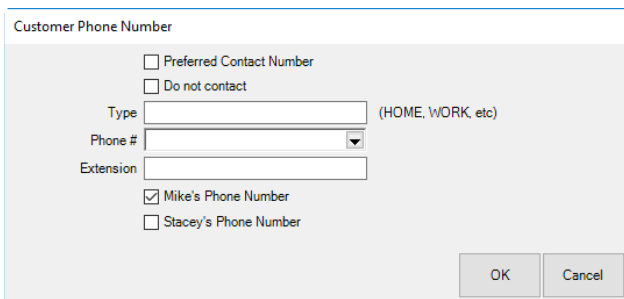

2. Indicate whether the address is the preferred address. This indicates that the address will be used by default. It will also serve as a filter when creating lists that have the **Preferred Address Only** parameter.
3. Select a **Type**. This indicates the location of the address, e.g., Home, Office, etc.
4. Complete the address fields.
5. Indicate whether this is the primary contact's address, in this example, Mike's address, or the spouse/partner's address.
6. Select **OK**. The new address will appear in the **Contact Method** list.

If there was previously no address, a newly added one will automatically be marked **Preferred**. You can uncheck it if necessary.

Adding a Customer Phone Number

To add a customer phone:

1. From the **Customer Edit General** tab, select + **Phone** (**+ Phone**). The **Customer Phone Number** window will appear.

2. Indicate whether the number is the preferred number. This indicates that the number will be used by default. Indicate whether this number is a Do Not Contact number. If no phone number is preferred, the customer will be listed as Do Not Call in certain features such as text message marketing.
3. Select a **Type**. This indicates the location of the number, e.g., Home, Office, etc.
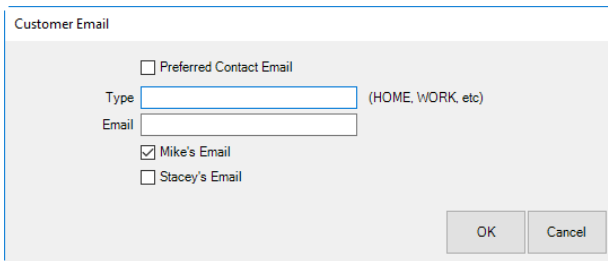4. Enter a phone number.

5.   If applicable, enter a telephone extension.
6.   Indicate whether this is the primary contact's number, in this example, `Mike's Phone Number`, or the spouse/partner's number.
7.   Select **OK**. The new number will appear in the **Contact Method** list.

If there was previously no phone number, a newly added one will automatically be marked **Preferred**. You can uncheck it if necessary.

Adding a Customer Email Address

To add a customer email:

1.   From the **Customer Edit General** tab, select + **Email** (![+ Email]). The **Customer Email** window will appear.

2.   Indicate whether the email address is the preferred email address. This indicates that the email will be used by default.
3.   Select a **Type**. This indicates the location of the email, e.g., `Home`, `Office`, etc.
4.   Enter an email address.
5.   Indicate whether this is the primary contact's email, in this example, `Mike's Email`, or the spouse/partner's email.
6.   Select **OK**. The new email address will appear in the **Contact Method** list.

If there was previously no email, a newly added one will automatically be marked **Preferred**.   You can uncheck it if necessary.

Notifications

In working with notifications in general, you will notice that this is an area where checking customer data at point of sale is very useful. It's a chance to confirm email or mobile phone numbers at a time that would be very understandable to the customer.

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. The **Customer Notification** window will appear.

The **Customer Notification** window looks much like the contact method section of the **Customer Edit ► General** tab. Notice that you can add phone numbers or email addresses from here. You can edit existing contact methods as well.

Select the contact method for the individual to whom the notification should go.