

Last Associate

Overview

The Edge version 20.0 adds new features that require each customer be assigned to an associate. Previously, this was always possible, but required you to manually assign them on the customer record's **Other Keys** tab.

To automate this process two new fields were added that will automatically populate. These fields appear on the customer record's **General** tab.

Method	Type	Who	Contact Address
Cell		Dominick	(203) 430-6500
Work		Dominick	(203) 446-8001
Home		Dominick	dom@dom.com
Work		Dominick	Dominick@ajsllc.com
Home		Dominick	1 Main St Naugatuck, CT 06770

Last Merchandise Associate Tom Owner
Last Transaction Associate Tom Owner

Last Merchandise Associate

Associate that last processed a merchandise sale or service intake for this customer.

Last Transaction Associate

Associate that last processed any type of transaction for this customer.

These fields are automatically set for all customers. The initial value is set when you first update to version 20.0 and then they are automatically updated in real-time as sales transactions are made.



NOTE: These new options do not change **Assigned Associate**. If you manually assign associates on the customer record's **Other Keys** tab you can continue to do so. **Assigned Associate** will continue to be a valid option throughout the software.

Where are these used?

Customer Find

The **Last Associate** options are searchable and appear at the bottom of the **Other Keys** tab of **Customer Find**.

Find Customers

General Results Merchandise Wishes Dates Other Keys Amt. Spent Repair/Custom Appraisal Rewards/Referral Postcards

Acquisition

His Finger Sz

Her Finger Sz

Metal Pref

Stone Pref

Custom 4

Custom 5

Custom 6

Custom 7

Custom 8

Notes
(only searches first 255 characters of the notes field)

Store

Group/Mailing List

Referred By

Why In

Associate

Assigned

Last Merchandise

Last Transaction

Presets... OK Cancel

Store Calendar

The **Store Calendar** allows you to specify how you want to assign customers to associates for the purposes of working with occasions. This is found in calendar settings (top right, gear icon).

Calendar Settings

Calendar Settings

Color Show By Default

Font Color

Birthday

Anniversary

Appointment

Tasks

Repair

Custom Job

Special Order

Appraisal

Job Task

Overdue Service Pickup Days

Occasion Associate

Assigned Associate

Last Transaction Associate

Last Merchandise Associate

Save Cancel

Dashboards

Dashboard tiles that display customer occasions will give the option to display by the manually assigned associate or one of the new automatic methods.

Report Groupings

Most customer reports will include these as grouping options.