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.

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**.

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).

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.