Hidden Contacts

Introduction

Hidden Contacts is a feature designed to protect the privacy of your VIP customers by hiding their contact methods throughout The Edge. Contact methods for these customers, such as phone number, email, and home address, will be hidden from reports, receipts, lists, and more.

Setting up your customers with **Hidden Contacts** is quick and easy, as it requires nothing more than setting specific **Associate Permissions** and checking a box on the customer record itself.



NOTE: Customers setup as **"Hidden"** will be **unable** to receive **ANY notifications** from Edge, as marking them this way automatically disables notifications. This includes **Repair notifications**, **Podium reviews**, and **Occasions texting**.

Getting Started

As a first step, you will need to set the **Associate Permissions** for any associates in store that should have the authority to make such decisions as to which customers should be hidden from contact.

To setup the Associate Permissions:

- 1. Go to Admin > Associates > Associate List.
- 2. Highlight desired associate & click Edit.
- 3. Navigate to **Security** & search "Hidden" to find the 2 available permissions.

Permission Name	Permission it Allows
Change the hidden status for customer contact information	Gives associate the ability to hide customer information via checkbox on customer record
See hidden customer contact information	Gives associate the ability to view hidden contact methods of hidden customers.

Setting Customers as Hidden

Once Associate Permissions have been set, you are ready to mark customers as hidden.

To do so, you will need to pull up the customer record:

- 1. Go to **Customer > Find** then use the **Customer Filter** to find your customer.
- 2. Visit the **Options** tab.
- 3. Check the box for "Hide Contact Information".

eneral Other Keys Balances	Wish List Activity Notes P	op-Ups Options	Appointments		
Tax Exempt	Tax	: ID #			
House Account Customer	Special Interest	t Rate			
Never Send Statement	Minimum Pay	yment			
Hide Contact Information	Credit	: Limit			
				B	

NOTE: If **Associate Permissions** were **NOT** set prior to checking this box, The Edge will notify you that you **do not** have **permission** to perform this task.

What to Expect with Hidden Customers

When a customer is set as "Hidden", only their name will appear in POS, lists, and elsewhere in The Edge. Hidden Customers will appear throughout The Edge as "Contacts Hidden", in place of contact methods, with Contact Methods being inaccessible as shown in the example below:

POINT OF SALE - Van Gogh, Vincent (001-00039) Associate 1 MANAGER, Jim (1) Customer #001-00039	Share		
Vincent Van Gogh	Find Cust	Notes / Edit	Contact Methods
CONTACTS HIDDEN	New Cust	Wish List	Appts
0 0 1 156 08/2020	No Name	Ship	

Only the Customer Name and Customer ID will appear on receipts, including the Store Copy:

testing 1 EDGE Tech Shop Test. is this the disclaimer 3 Corporate DYNe Shefton, CT 06484 support@ajble.com (877) 844-0002		REC #001- 9/2/2020 You were Jim MAN	EIPT 00090
Sold To:	#001-00039		
Vincent Van G	ogh		
140-1000012 Purchase	White Granular 24 Ring Size 5	l Karat Contemporary	\$625.00
		SubTotal	\$625.00
		ct	\$37.50
		Total	\$662.50
		Cash Tendered	\$662.50

Viewing Hidden Contacts

Associates with the permission "See hidden customer contact information" will be able to view the contact methods of a Hidden Customer at anytime when accessing a customer record anywhere within The Edge by utilizing the Supervisor menu and selecting Show Hidden Contacts.

🖳 Edit Customer - Van Gogh, Vincent (001-00039)		
General Other Keys Salances Wish List Activity Notes Pop-Ups	Dptions Appointments	
General Inactive Primary Spouse/Partner		
ID # 001-00039	Method Type Who Contact Address	
Gender V V		
Title		
First Vincent		
Middle		
Suffix		
License #		
Company Artist Co		
Birthday		
6 6	• • • • • • • • • • • • • • • • • • •	
	Merg	e
Couple V	Show	Hidden Contacts
Dt Entered 8/20/2020	Address A Diseas A Swell	
Last Merchandise Associate Jim MANAGER	Add t	o Web Upload
Icc < 41 of 41 > >>I Save & Save & Duplicate	Supervisor Add 1. Nevert Stay & OK / Save Cancel	el