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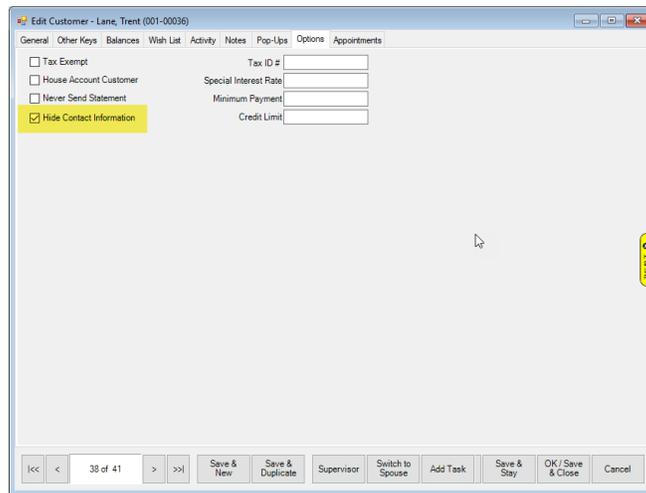
> **NOTE:** If **Associate Permissions** were **NOT** set prior to checking this box, The Edge will notify you that you **do not** have **permission** to perform this task**.**

## 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:



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

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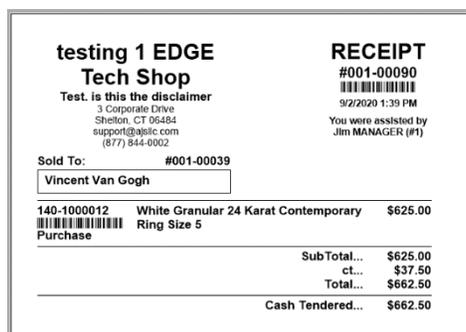
## Viewing Hidden Contacts

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**.