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.

	er - Mastri, Dominio Keys 🔵 Balances			Notes	Pop-Ups	Options	Appointr	ments		
General										
Inactive	Primary		Spouse	/Partner		Method	Ture	Who	Contact Addre	
ID # (001-12686					Method	Туре	wno	Contact Addre	ess
Gender	Male	~			\sim	\bigcirc	Cell	Dominick	(203) 430-6500	\otimes
Title					_	C	Work	Dominick	(203) 446-8001	
First L Middle	Dominick						Home	Dominick	dom@dom.com	
Last	Mastri						Work	Dominick	_ Dominick@ajsllc.com	
Suffix						_			1 Main St	~ ~ ~
License #						$(\hat{\mathbf{n}})$	Home	Dominick	Naugatuck, CT 06770	(B) 🔀
Company										
Birthday	1/1/2000									
Couple										
	10/29/2019 erchandise Associat ransaction Associat	e Tom Ow				+ A	ddress	+ Pho	one 🕂 Email	
< <	1 of 4 >	~	Save & New	Save Duplic		Supervisor	Add Task	Rever	t Save & OK / Save & Close	

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 Cu	stomers									
General	Results	Merchandise	Wishes	Dates	Other Keys	Amt Spent	Repair/Custom	Appraisal	Rewards/Referral	Postcards
	Acquisitio	on								
Hi	s Finger S	Sz								
He	er Finger S	Sz								
	Metal Pr	ref					-			
	Stone Pr	ef					-			
	Custom	4					-			
	Custom	5					-			
	Custom	6					-			
	Custom	7					-			
	Custom	8					-			
	Not		uee firet 25	5 chara	cters of the n	otes field)				
	Sto		V	5 chara	ciers of the fi	otes neity				
Group/	Mailing Li	st		_			-			
	Referred E	Зу					-			
	Why	In					-			
Associ	ate									
	Ass	igned					-			
	st Mercha ast Transa			•			▼			
Prese	ets								ОК	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	•	\checkmark				
Anniversary	•	\checkmark				
Appointment	•					
Tasks	•	V				
Repair	•					
Custom Job	•	\checkmark				
Special Order	•	V				
Appraisal	•	\checkmark				
Job Task	•					
Overdue Service Pickup Days	14					
Occasion Associate	Assigned Assoc	siate 🔻				
	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.

Dashboard Tile	Setup		
	I	List View Tile Setup	
	Tile Title		
:=	Data Set	Customer Data	•
 Instruct	Data Value To Display		•
#		Birthdays by Associate	
Numeric		Birthdays by Last Merch Assoc	
		Birthdays by Last Transaction Assoc	
Gauge		Anniversaries by Associate	
<u>010</u>		Anniversaries by Last Merch Assoc	
Chart		Anniversaries by Last Transaction Sale	•
_			
List View			
		Save	Cancel

Report Groupings

Most customer reports will include these as grouping options.

Customer List			
Sale Number	Old Sale : This Year (2020)	#	
	,		
Sold To	1		
Sold By			~
Store	▼ Station		
Item Number			
Group/Sort By	Field Date Entered Custom 4 Custom 5 Custom 6 Custom 7 Custom 7 Custom 8 Acquisition Year Entered Her Finger Sz Metal Pref Stone Pref His Finger Sz Assigned Associate Last Transaction Associate	^	Show Details Page Breaks Include Spouse/Partner Show Customers Individually
	Last Merchandise Associate	~	Use Report Criteria Cover Page
	٢	>	Include Colors On Report
Presets			OK Cancel