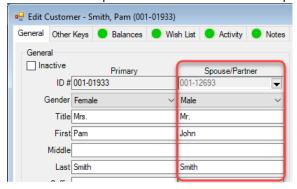# THE EDGE®

POS – Linked Customer Accounts
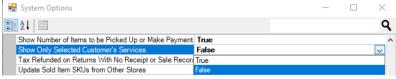
Linked Customer Accounts

The **Spouse/Partner** field on the **General** tab of the customer record allows you to link two customer records so you can track, and market to them, as a couple. Although linked, The EDGE still maintains a separate record for each customer. This document explains how this affects what is displayed at POS for service transactions.

System Options

If you have a customer record with a linked **Spouse/Partner** there is a **System Option** that controls how layaways, special orders, repairs, memos, and custom jobs will appear in the **Payment** and **Pick Up** screens at POS.
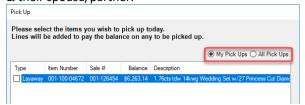
Administrative ► System Options ► POS Options

- **True**   Only display this customer's available service transactions for payment and/or pick up.
- **False**   (Default) Display customer & spouse/partner's available service transactions for payment and/or pick up.
   Note: It always displays this way if you search by couple instead of individual.
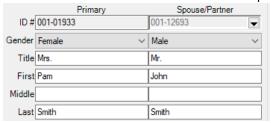
Payment / Pick Up Screens

This option controls the default setting but can still be changed live at POS. The **Pick Up** and **Payment** screens contain a radio button in the top right that controls whether to show available transactions for just this customer or for the customer & their spouse/partner.

Examples

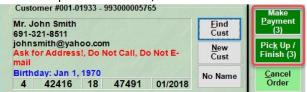Let's look at this linked account for Pam & her spouse John and examine two sample cases.

CASE 1
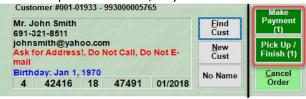
John has a layaway in his name only (1 service).
Pam has a repair & special order in her name only (2 services).

With this option set to **False**, all service transactions show at POS regardless of customer selected.

With this option set to **True**, only transactions for the selected customer show.

CASE 2

John picks up his layaway and no longer has any services in his name (0 services).
Pam still has a repair & special order in her name (2 services).

With this option set to **False**, all transactions show regardless of customer selected.

With this option set to **True**, only transactions for the selected customer show. John does not have any open service transactions, but there are transactions available under his spouse. To make the associate discreetly aware the buttons are highlighted in light green and do not display the number of available service transactions.