

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.

Type	Item Number	Sale #	Balance	Description
<input type="checkbox"/>	Layaway	001-100-04672	001-126454	\$6,263.14 1.76cts tdw 14kww Wedding Set w/27 Princess Cut Diam...

Date	Type	Sale #	Updated	Balance	Minimum Due	Description
<input type="checkbox"/>						
2/5/2018	L	001-126454	2/5/2018	\$6,263.14		001-100-04672: 1.76cts tdw 14kww Wedding Set

Examples

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

	Primary	Spouse/Partner
ID #	001-01933	001-12693
Gender	Female	Male
Title	Mrs.	Mr.
First	Pam	John
Middle		
Last	Smith	Smith

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.

Customer #001-01933 - 993000005765

Mr. John Smith
691-321-8511
johnsmith@yahoo.com
Ask for Address!, Do Not Call, Do Not E-mail
Birthday: Jan 1, 1970

4 42416 18 47491 01/2018

Find Cust
New Cust
No Name

Make Payment (3)
Pick Up / Finish (3)
Cancel Order

Customer #001-01933 - 993000005765

Mrs. Pam Smith
67 Allenwood Dr
West Fargo, ND 58078
691-942-8583
Do Not E-mail
Birthday: Jan 1, 1970

4 42416 18 47491 08/2003

Find Cust
New Cust
No Name

Make Payment (3)
Pick Up / Finish (3)
Cancel Order

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

Customer #001-01933 - 993000005765

Mr. John Smith
691-321-8511
johnsmith@yahoo.com
Ask for Address!, Do Not Call, Do Not E-mail
Birthday: Jan 1, 1970

4 42416 18 47491 01/2018

Find Cust
New Cust
No Name

Make Payment (1)
Pick Up / Finish (1)
Cancel Order

Customer #001-01933 - 993000005765

Mrs. Pam Smith
67 Allenwood Dr
West Fargo, ND 58078
691-942-8583
Do Not E-mail
Birthday: Jan 1, 1970

4 42416 17 45566 08/2003

Find Cust
New Cust
No Name

Make Payment (2)
Pick Up / Finish (2)
Cancel Order

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.

Customer #001-01933 - 993000005765

Mr. John Smith
691-321-8511
johnsmith@yahoo.com
Ask for Address!, Do Not Call, Do Not E-mail
Birthday: Jan 1, 1970

4 42416 18 47491 01/2018

Find Cust
New Cust
No Name

Make Payment (3)
Pick Up / Finish (3)
Cancel Order

Customer #001-01933 - 993000005765

Mrs. Pam Smith
67 Allenwood Dr
West Fargo, ND 58078
691-942-8583
Do Not E-mail
Birthday: Jan 1, 1970

4 42416 18 47491 08/2003

Find Cust
New Cust
No Name

Make Payment (3)
Pick Up / Finish (3)
Cancel Order

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.

Customer #001-01933 - 993000005765

Mr. John Smith
691-321-8511
johnsmith@yahoo.com
Ask for Address!, Do Not Call, Do Not E-mail
Birthday: Jan 1, 1970

4 42416 18 47491 01/2018

Find Cust
New Cust
No Name

Make Payment
Pick Up / Finish
Cancel Order

Customer #001-01933 - 993000005765

Mrs. Pam Smith
67 Allenwood Dr
West Fargo, ND 58078
691-942-8583
Do Not E-mail
Birthday: Jan 1, 1970

4 42416 17 45566 08/2003

Find Cust
New Cust
No Name

Make Payment (2)
Pick Up / Finish (2)
Cancel Order