

BIG HAIRY DOG FEATURE OF THE MONTH



THE INDUSTRY LEADER IN
RETAIL PRO SALES & SUPPORT

HOW TO SET SYSTEM PREFS TO SHARE CUSTOMERS

Version 8

<https://youtu.be/fpYp9mEQ6yY>

You can share customer records across all your Retail Pro locations, or only share them with the main, or decide not to share customers at all. Sharing a customer record sends a copy of the record to other Retail Pro locations.

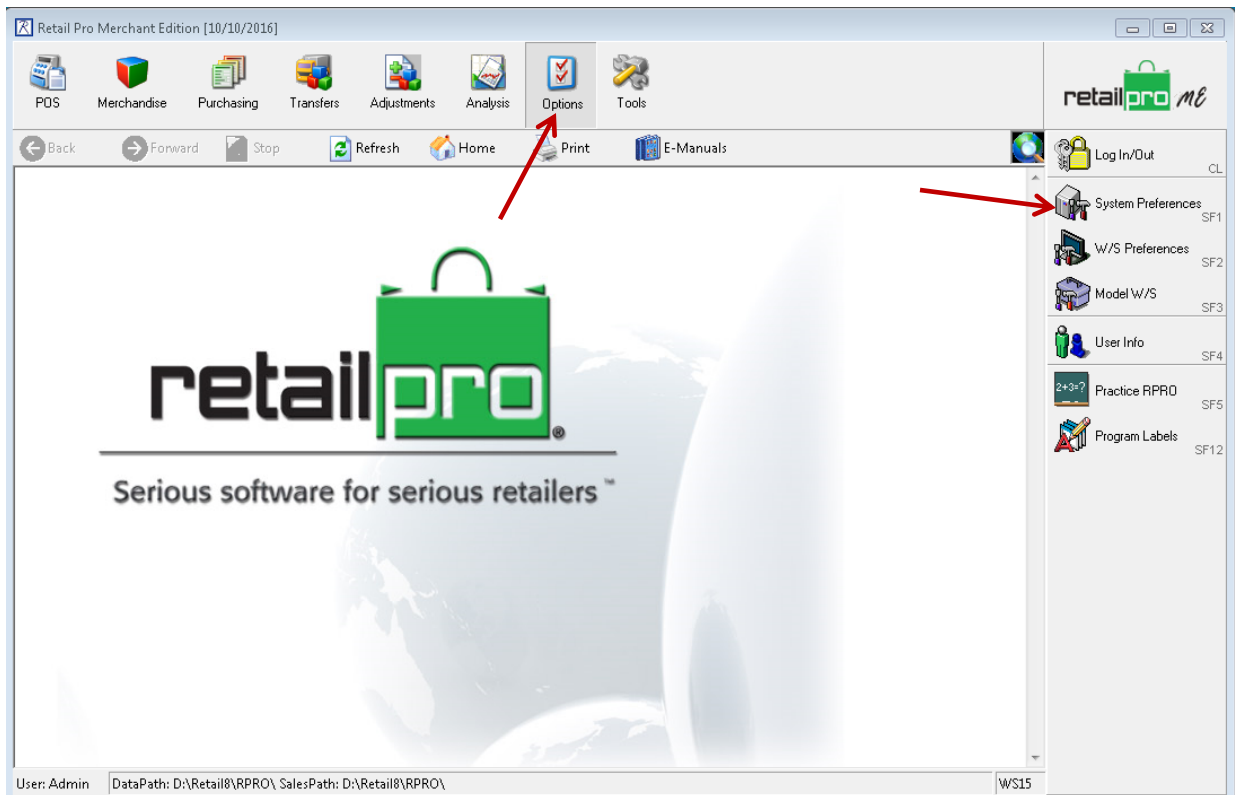
These locations will then be able to view the customer records and conduct typical functions such as editing customer information or referencing the customer on a receipt. The customer record is kept up-to-date across stations via the polling process.

Refer to the table below for processing rules:

Sharing Status	Polling DIFFERENCES	Polling ALL or Initializing	
		Exclusive Customer List	Non-Exclusive Customer List
NOT SHARED	to info stations only	to info stations only	to info stations only
MAIN ONLY	to info stations & originating station only	to info stations & originating station only	to info stations & originating station only
ALL STATIONS	to all stations	to all stations	to info stations & originating station only

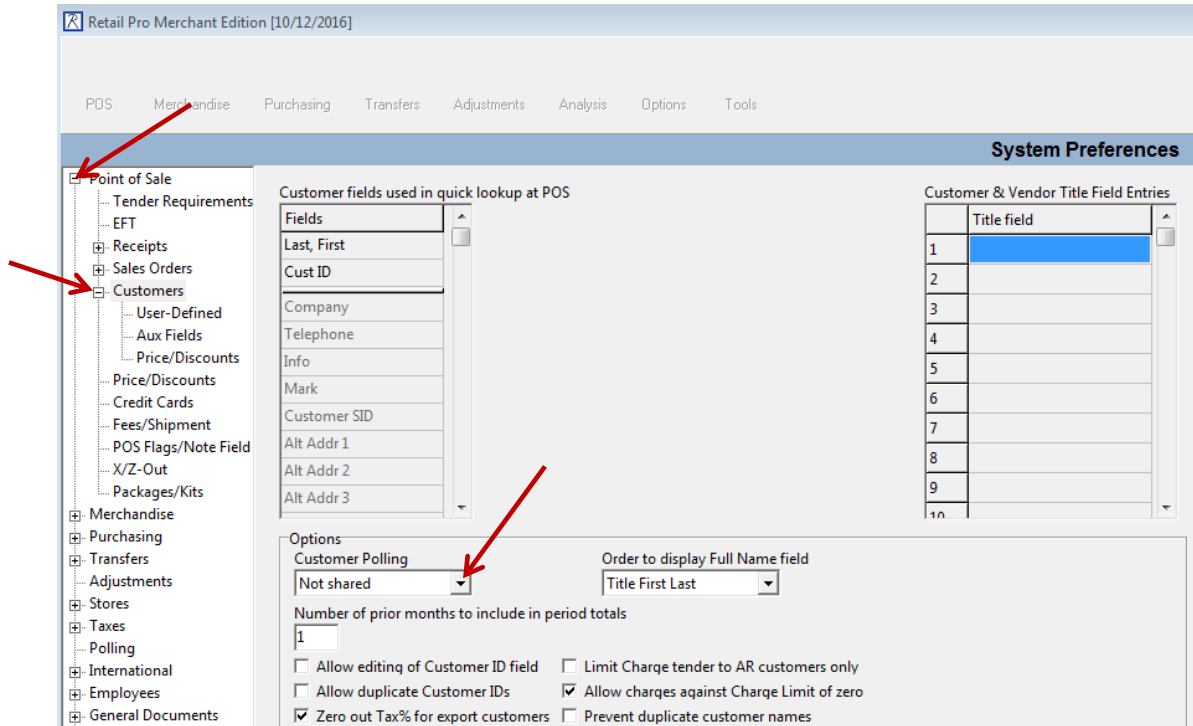
*Note that this will set the default for customer records, and individual records can be set differently than the default with each customer's "Share" field .

To check or change default customer sharing setting, click on the “Options” button and then click on the “System Preferences” button.

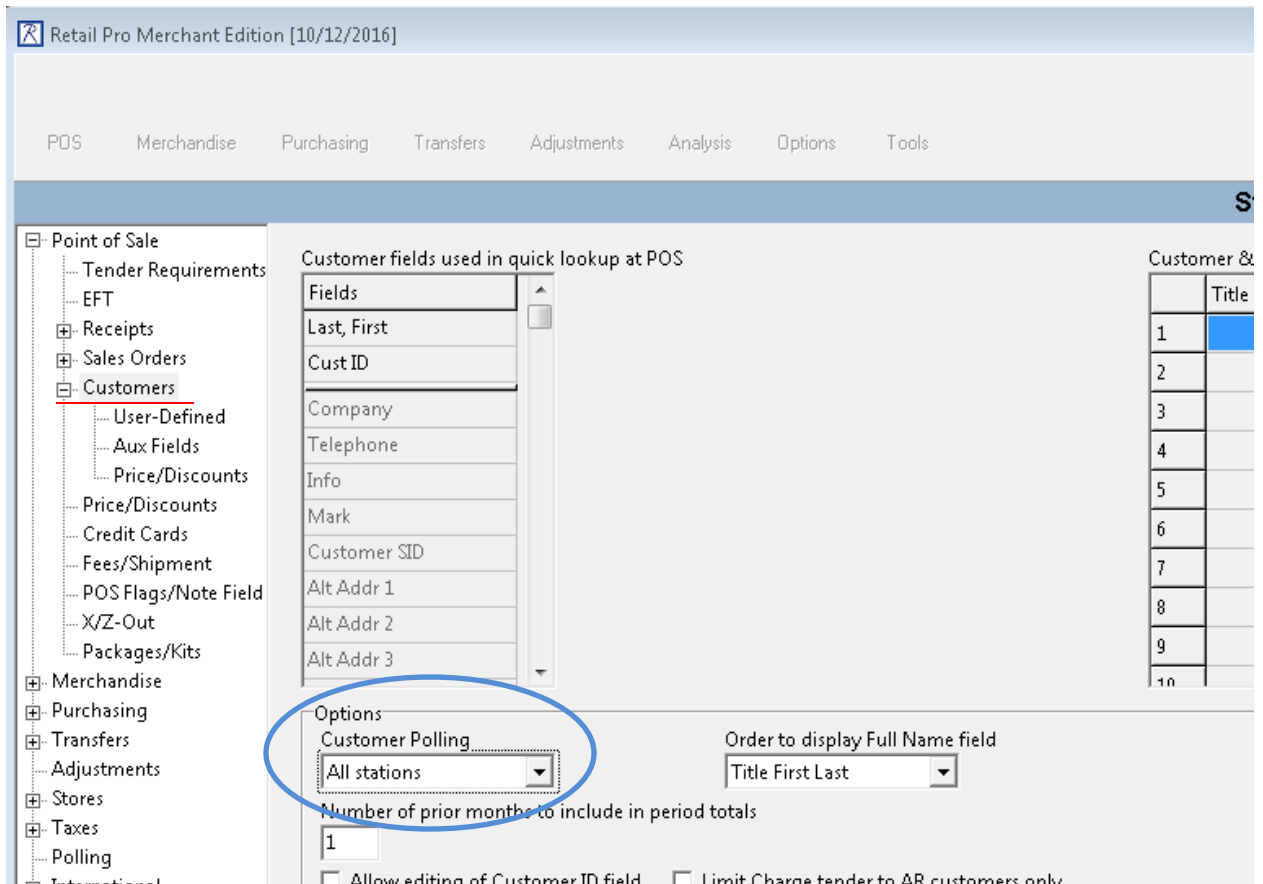


Then in the System Preferences window, expand the “Point of Sale” section on the left-side menu by clicking on the plus (+) sign, then click on and highlight the “Customer” sub-section.

In the “options” section of this panel, you can then click on the “Customer Polling” drop-down and select the default sharing setting. The choices are : All Stations, Main Only, and Not shared.



To set the default to share all customers across all location, select “All Stations” and then Save.



***PLEASE NOTE: IF YOU ARE A SINGLE STORE LOCATION THEN NOT SHARED IS SUGGESTED.**