

BIG HAIRY DOG FEATURE OF THE MONTH



THE INDUSTRY LEADER IN
RETAIL PRO SALES & SUPPORT

HOW TO SET SYSTEM PREFS TO SHARE CUSTOMERS

Version 9

https://youtu.be/T_NqGTGevxo

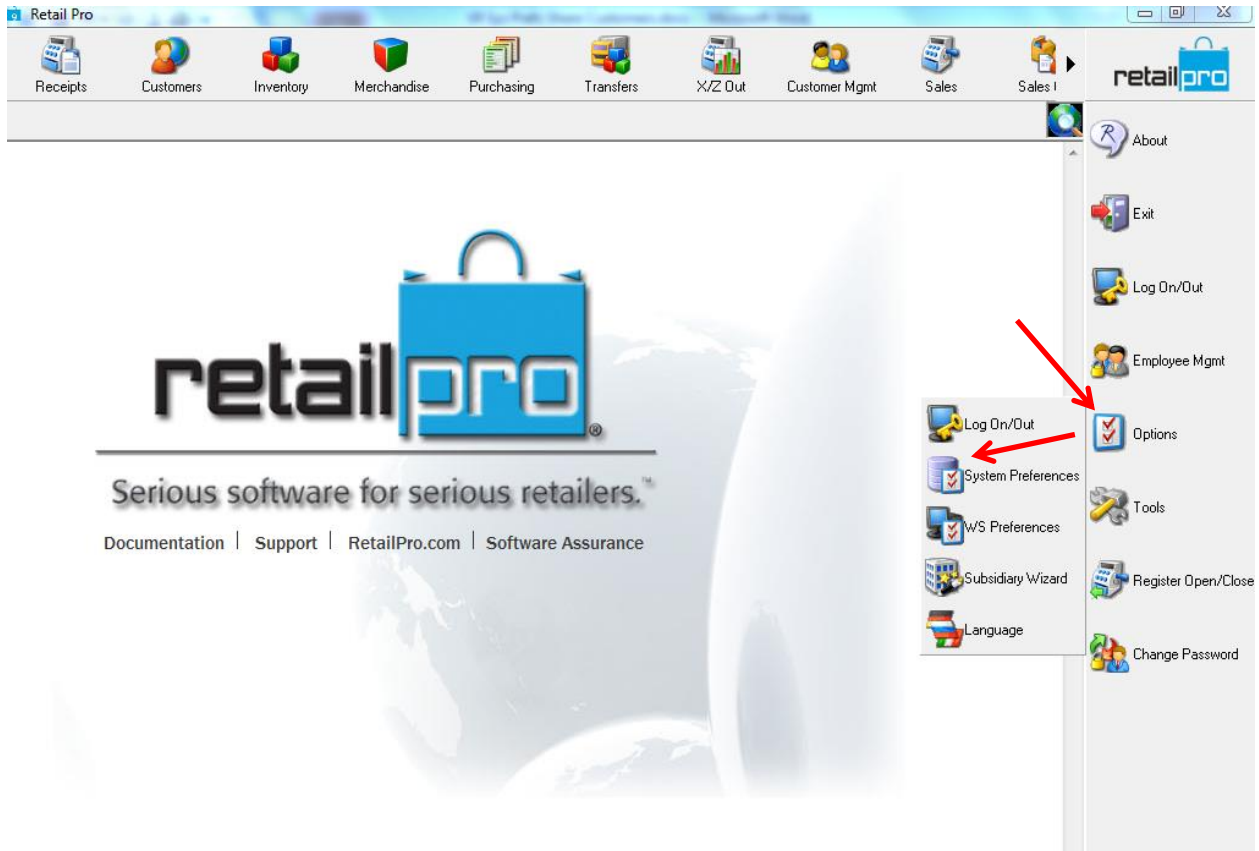
You can share customer records across all your Retail Pro locations, or only share them locally, regionally, or decide not to share customers at all.

ECM will process out customer records according to the Local, Regional or Global status of a given record. Refer to the table below for processing rules:

Customer Type	Description
Global	Global customers are communicated to all active sub\store locations set within ECM.
Local	Local Customers are only be communicated to stores within the customer defined base subsidiary. Note: There are restrictions on users' ability to assign a region\district to a local customer.
Regional	Regional customers are communicated to all sub\store locations for that associated region. If the customer is flagged as a regional customer, but is not given a region or district, that customer will be treated as a local customer and will not be communicated to any other location.
Not Shared	Any customer that is marked with the flag of Not Shared will not be communicated to any other store locations.

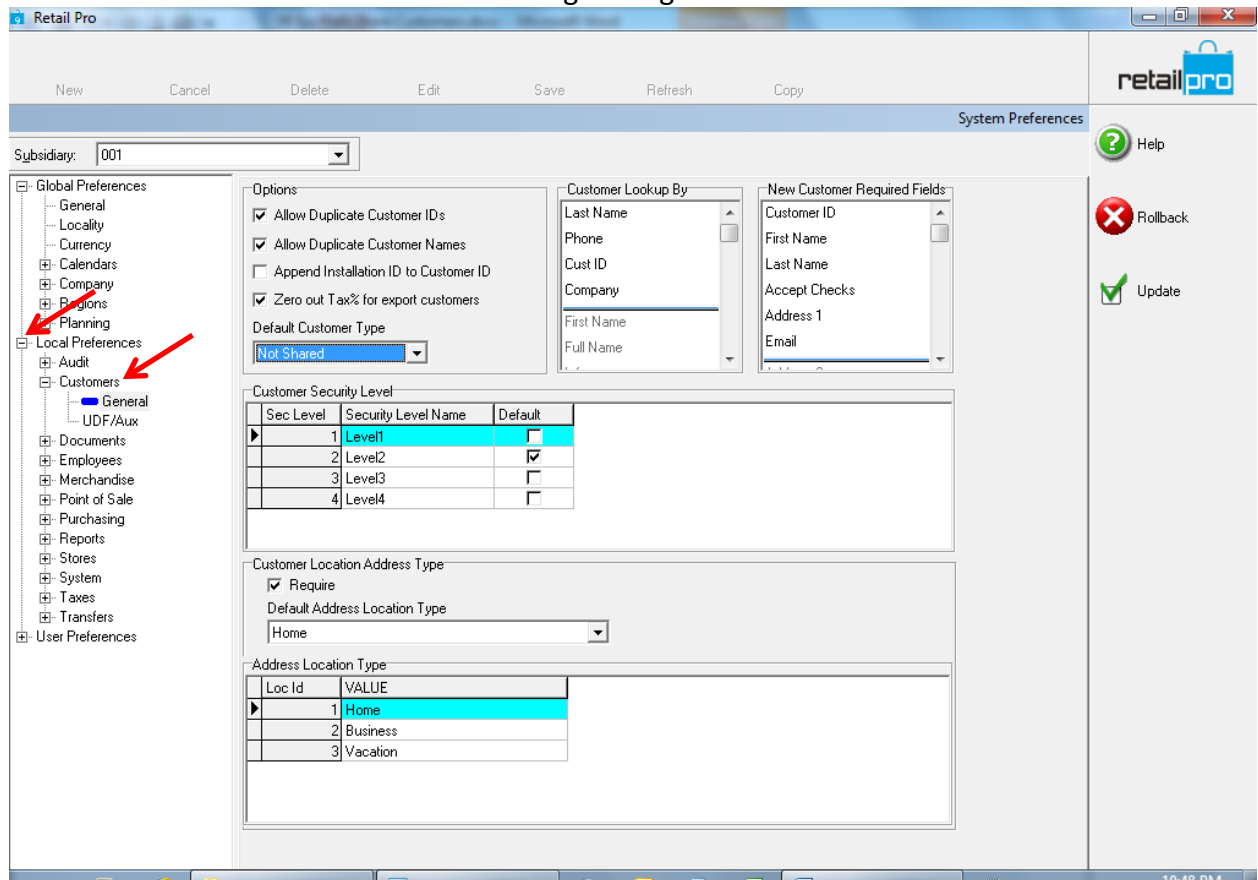
*Note that this will set the default for customer records, and individual records can be set differently than the default in each customer record "Customer Shared Type" field .

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



Then in the System Preferences window, expand the “Local Preferences” 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 “Default Customer Type” drop-down and select the desired default sharing setting.



For example, to set the default to share all customers across all locations, on the drop down, select “Global” and then click on the “Update” button to save this setting.

