

Customer Anonymization

With data privacy a growing concern for consumers and businesses, the Customer Anonymization feature is an option that can help protect your customer's information.

It's also a feature that's in compliance with the California Consumer Privacy Act (CCPA).

When you complete this course, you should be able to identify what happens when you anonymize a customer, identify the options, security, and account requirements for customer anonymization, and be equipped to complete the Anonymize Customer process in the system.

Select the first topic to get started.

Topics

- What is Customer Anonymization?
- System Requirements
- How to Enable Customer Anonymization

What is Customer Anonymization?

Customer Anonymization is an optional feature that helps you protect customer information and follows the California Consumer Privacy Act (CCPA).

Anonymizing a customer replaces the customer Name with the word Anonymous followed by the customer's number and adds ZZZZ to the front of the Sort Name.

The process also clears all data fields in the customer record.

When you anonymize a customer, the system:

- moves Quickrecall transactions and all sales data (including Period to Date, Year to Date, and Last Year) to the default cash customer account for that store
- deletes Customer contacts note types, change log entries (including initial snapshots and customer contacts
- deletes customer multiple ship to information, and
- deletes customer custom SKU's.

The only data unaffected by the anonymization is:

- Archived POS transactions,
- Scanned documents,
- Order Change log,
- Data under a previous customer number, and
- Transactions retained in compass that are no longer in Quickrecall

Be Aware! Once you anonymize a customer, you cannot undo it, therefore take care when performing the anonymize customer procedure.

System Requirements

When you're ready to begin anonymizing customers, you'll want to make sure these three things are in order first.

- System Options
- Security Bits, and
- Customer Account Requirements

Let's look at the options first.

There are two options that control customer anonymization.

Option 1961 – enable Anonymize Customer Data, when set to Yes, allows you to anonymize customers in the system.

The second Option, 1966 – Anonymize Customer Minimum Days, sets the number of days that must pass from the customer's dates for account Added, Last activity, and Last payment before you can anonymize them.

For example: If our customer Clark Hamor makes a purchase today, and Option 1966 is set to 90, we would need to wait at least 90 days before the system would allow us to anonymize his account.

Along with the options noted, you'll need Security Bit – 1164 – Anonymize Customer Data set to Yes so you can anonymize customers.

This bit defaults to no.

Along with the minimum number of days settings mentioned earlier, there are a few other conditions that the customer's account must meet before you can anonymize them.

They must have no open items on their account.

They cannot have any POS transactions on their account including Bids, Estimates, iNet Orders, Layaways, Orders, Service Orders, Rainchecks, Special Orders, Transfers, and Suspended transactions.

The account cannot have any jobs associated with it.

The account Balance must be zero.

The dates for Added, Last Activity, and Last Payment must be greater than the days specified in Option 1966 – Anonymize Customer Minimum Days.

Once you ensure the options, security bits, and requirements are in order, you can anonymize an account.

How to Enable Customer Anonymization

The simplest way for you to access Customer Anonymization is to start in Customer Maintenance.

Find the customer you wish to anonymize and open the Go To Menu.

Now, choose Change Customer Number/Job... You can also select this directly from the Eagle Browser under Accounts receivable.

If the customer account complies with the requirements in the previous section, you'll see the Anonymize Customer button enabled.

Select it.

Be aware that you cannot reverse Anonymization, so if you're sure you want to carry it out... select Yes.

The system carries out the anonymization and shows you a confirmation message.

Notice that the Customer Name, and Sort name have been changed.

If you look under Customer information, you'll see that the system has cleared their data.

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