Wish Lists

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Introduction

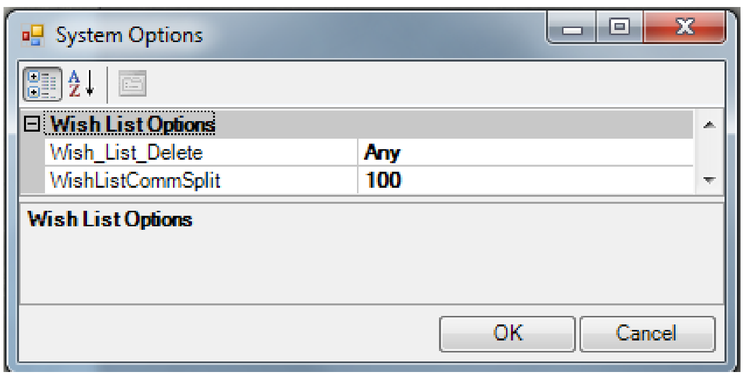
Wish lists allow you to save items and ideas in a customer record for future reference. They can be saved as reminders of what your customer wants to get or your customer can have the list sent to someone else, which is done through The Edge's notifications feature. This document explains the use of wish lists.

Set Up

Wish lists are always enabled in The Edge. However, there are some system options that should be reviewed.

To change **Wish List** system options:

1. Select **Administrative=>System Options**.
2. Scroll down to the **Wish List Options** section.



Options include:

Wish_List_Delete Indicates which associates can delete an item from a customer's wish list. Options are:

`Any`, which means anyone can delete an entry. It is the default.

`Permission` requires permission to delete the entry. This is set in Associate security. If the associate logged on does not have permission, a pop-up window will prompt for credentials.

`Override`, for which an override at the workstation by an authorized associate is necessary. The override will be requested regardless of who is logged on. `Override` is useful in that it requires the user to type a note or memo indicating why the item is being deleted and all `Overrides` are indexed for the security log report, which is run through reports.

WishListCommSplit Allows you to indicate the split of who gets commission for items sold from a wish list. `0` means the commission will go to the associate who enters the item into the wish list. `100` means the entire commission will go to the associate who completes the sale. Enter a number between `0` and `100` to indicate the split.

3. Adjust options as needed.
4. Select **OK**.

Associate Permissions

To allow associates to administer wish lists:

1. Select **Administrative=>Associates**.
2. Select the associate record and select **Edit**.
3. Select the **Security** tab and locate **Administer Wish Lists**.
4. Check the **Administer Wish lists** option to enable permissions for the associate. This allows editing of wish lists from the **Customer=>WishList=>Find**.
5. If desired, check the option to allow the associate to **Delete a Wish List Item**.

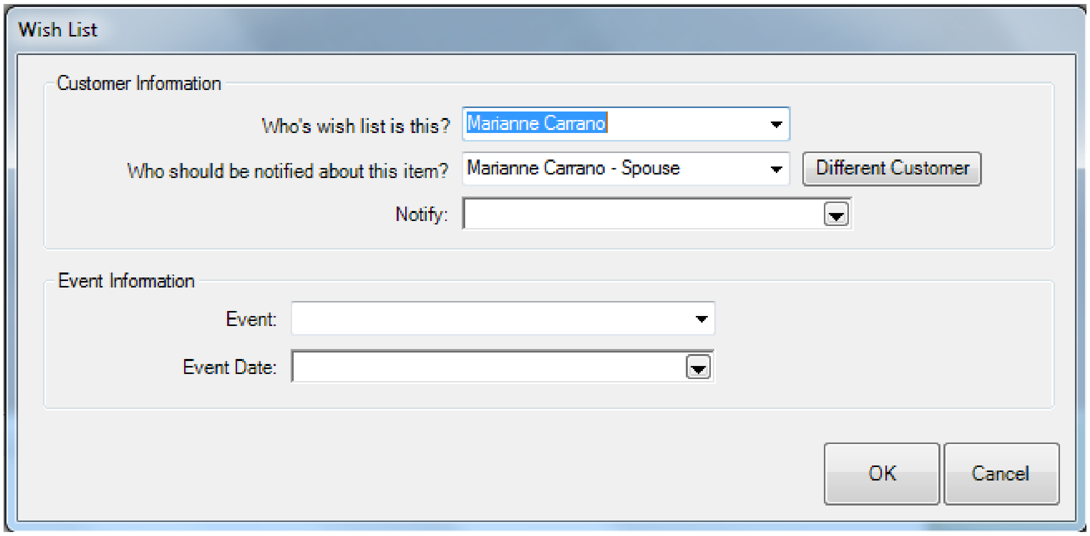
Entering Wish List Items

There are two ways to enter items into a customer's wish list: using "Save to Wish List," which is most efficient for quickly scanning in-stock items and using "Wish List Entry Mode," which allows for both stock and non-stock wish list entry.

Entering Wish List Items Using "Save to Wish List"

First, from POS:

1. Find the customer record.
2. Enter the item to be added as if it were a sale.
3. Select **Save to Wish List** instead of taking payment and completing the sale. The **Wish List** window will appear.



Fields and options in the **Wish List** window include:

Whose wish list is this?	Indicates who wishes for the item. The default is always SELF.
Who should be notified about this item?	Indicates who should be notified about the item. The default is the spouse of the person whose wish list you are entering. Click **Different Customer** to notify a different customer altogether.
Notify	Allows you to pick from the customer's existing contact information about how to send the notification. For more information, see the Tip Sheet entitled Automatic Service Notifications. Selecting **Add** allows you to specify a new method of contact, which will be saved on the customer account record.
Event	Indicates for what occasion the item might be a gift.
Event Date	Indicates the date of the occasion. If the event is an anniversary or birthday, it will be stored in the customer's record and can be queried for many marketing reasons.

4. Complete the fields as desired and select **OK**. The item will be added to the customer's wish list.

NOTE!

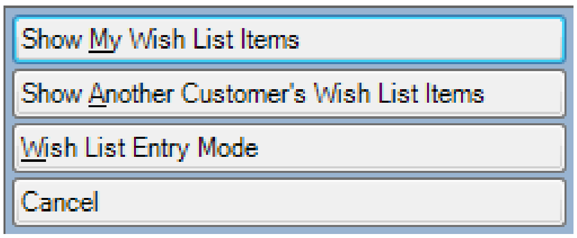
When you select Save to Wish List, you will be prompted to remove any sale line entry at POS inappropriate for wish list.

Entering Wish List Items Using "Wish List Entry Mode"

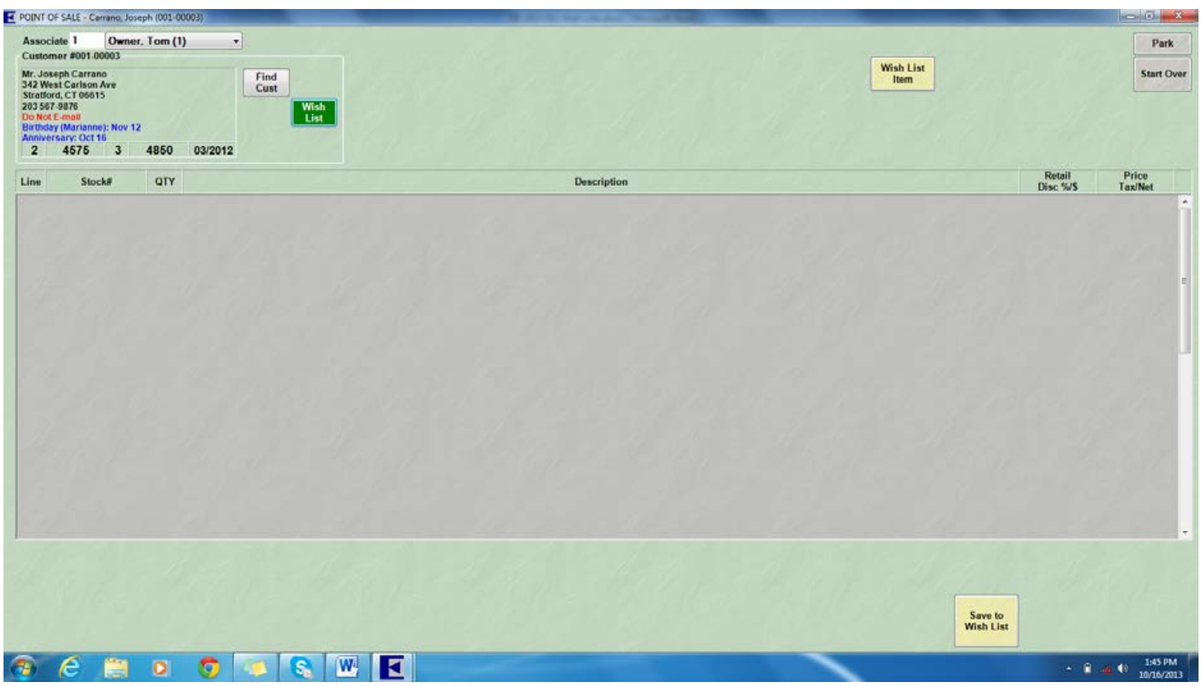
Wish List Entry Mode offers a view of the POS screen that allows for much more wish list flexibility. It does not require that the item be in stock. In fact, wish list items can be rough ideas or descriptions of items. To use **Wish List Entry Mode**:

From the POS screen, find the customer record as usual.

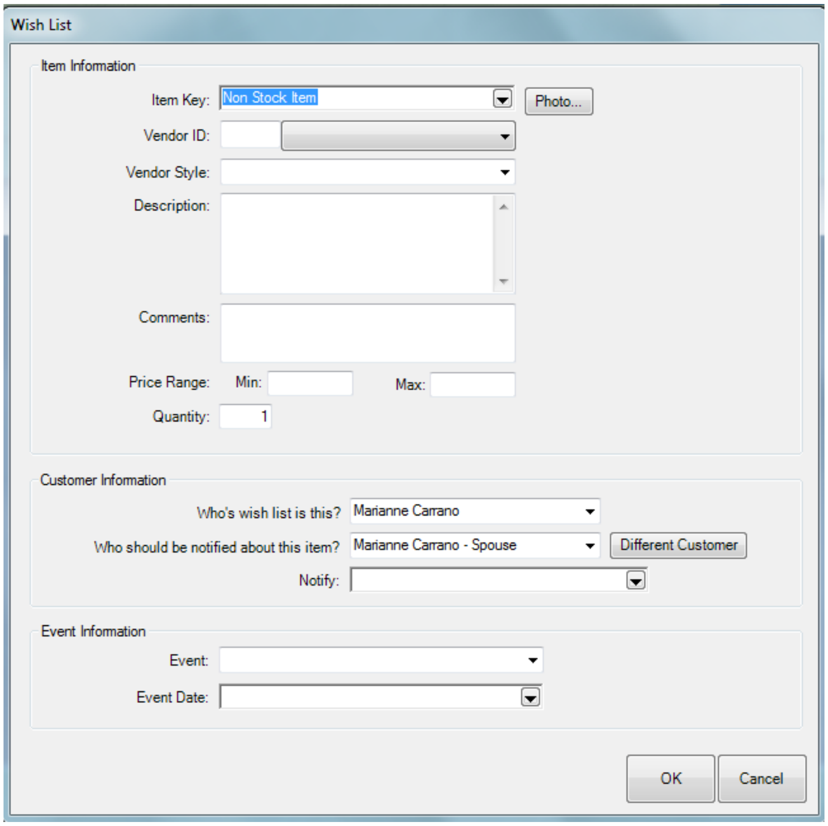
1. From the upper left corner of the screen next to the customer information, select **Wish List**. A sub-menu of wish list actions will appear.



2. From this menu, select **Wish List Entry Mode**. The **POS** screen will change to remove non-Wish List functions.



3. Select **Wish List Item**. The **Wish List** window will appear with additional options.



Fields and options in this **Wish List** window include:

Item Key	Use this to indicate that it is not a stock item, or use the drop-down menu to start the **Item Find** function and locate a particular item.
Vendor ID	Enter or find the vendor of the item.
Vendor Style	Enter or find the vendor style.
Description	This is an opportunity to express a wish for a non-stock item. It's also an opportunity to discuss options and ideas with the customer. Enter a description of the item. The more the customer can tell you about what he or she wants, the more useful it will be for the buyer.
Comments	Other information that might help a gift-giver.
Price Range	Use the **Min.** and **Max.** fields to enter a bottom and top monetary range.
Quantity	Enter the number desired.
Whose wish list is this?	Indicates who wishes for the item. The default is `Self`.
Who should be notified	Indicates who should be notified about the item. The default is

about this item?	Spouse. Select **Different Customer** to notify a different customer altogether. It will offer a list of related records or you can select a completely different customer.
Notify	Allows you to pick from the customer's existing contact information about how to send the notification. For more information, see the Tip Sheet entitled Automatic Service Notifications. Selecting **Add** allows you to specify a new method of contact, which will be saved on the customer account record. Once the record is saved, the notification will be sent. Because each wish list item has its own record, a separate notification will be sent for each one. Supervisors can resend a wish list. Find the wish, double click it to edit, and select Supervisor Resend Notification.
Event	Indicates for what occasion the item might be a gift.
Event Date	Indicates the date of the occasion. If the event is an anniversary or birthday, it will be stored in the customer's record and can be queried for many marketing reasons.

4. Complete the fields as desired and select **OK**.

5. The item will be saved to the customer's wish list.

TIPS!

- **Only Whose wish list is this? and Description are required. This gives customers much more flexibility.**

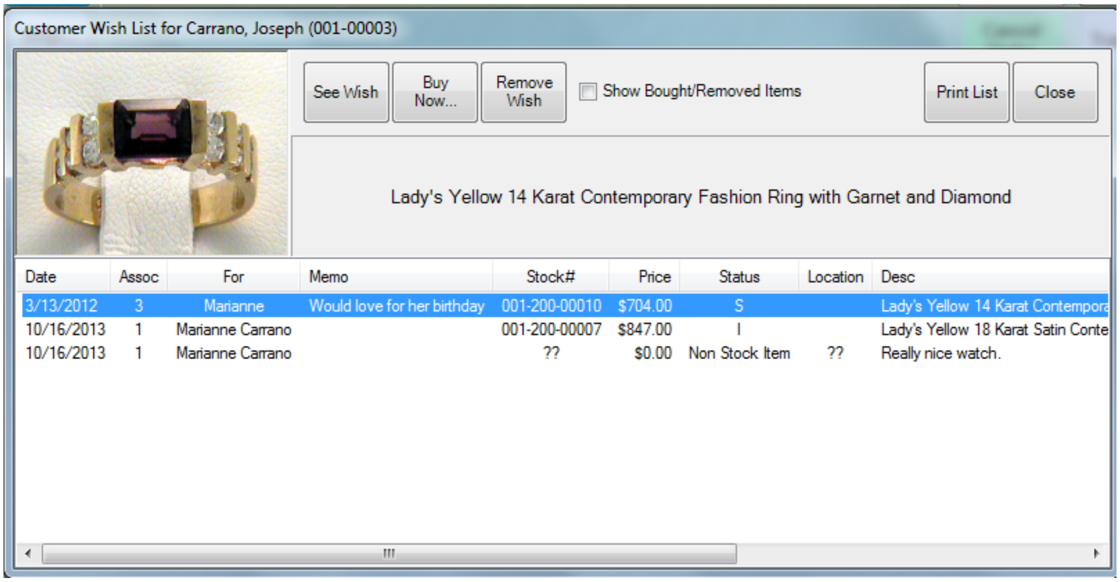
- **Wish list entries from Wish List Entry Mode can be reset by selecting Start Over.**

- **If a wish list item is changed, a new notification will be sent.**

Other Wish List Options

Notice that when you select **Wish List** from the **POS** screen, the drop-down menu offers additional options. They are described below.

Show My Wish List Items yields a listing of items associated with the customer.

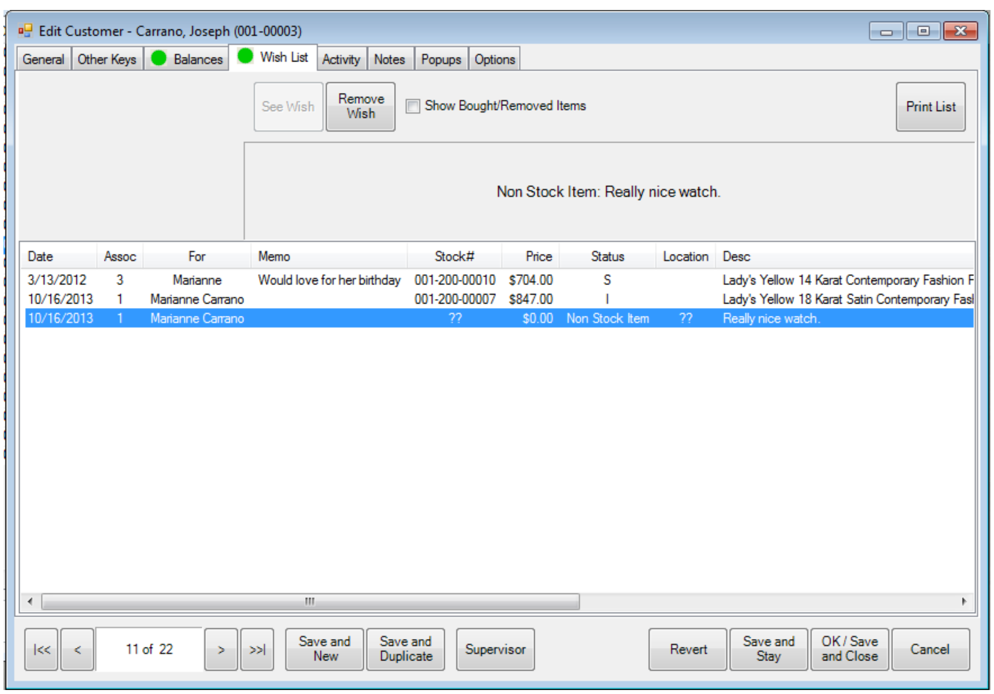


Show Another Customer's Wish List Items yields the **Find Customer** function to locate a customer and obtain his or her wish list.

Finding a Customer's Wishes

To find a customer's wish list:

1. Locate the customer record using **Customer=>Find**.
2. Open the **Wishes** tab.

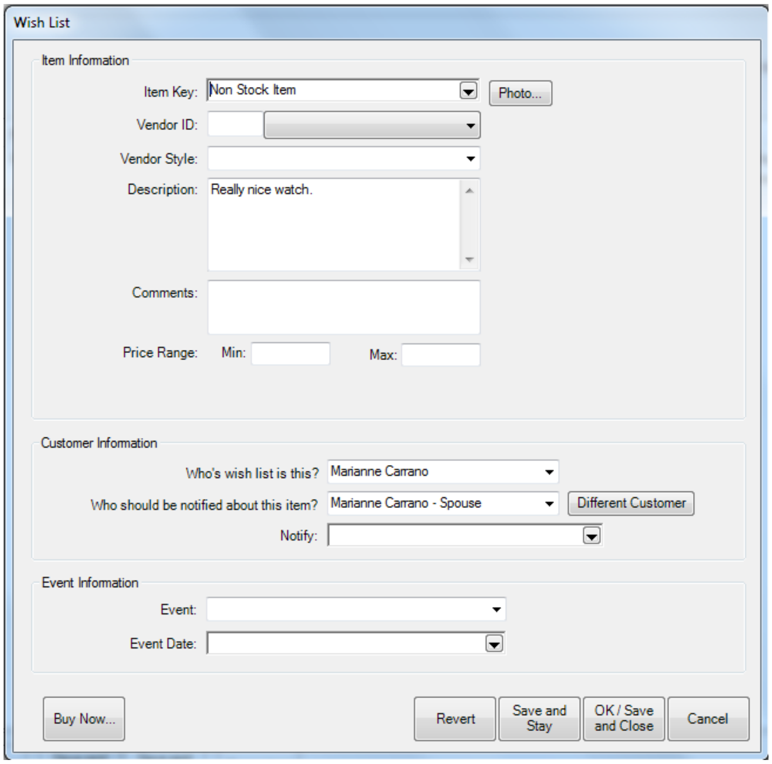


3. Double-click the record to work with it as described in creating a wish list, above.

Selling Wish List Items

To sell a wish list item to a customer:

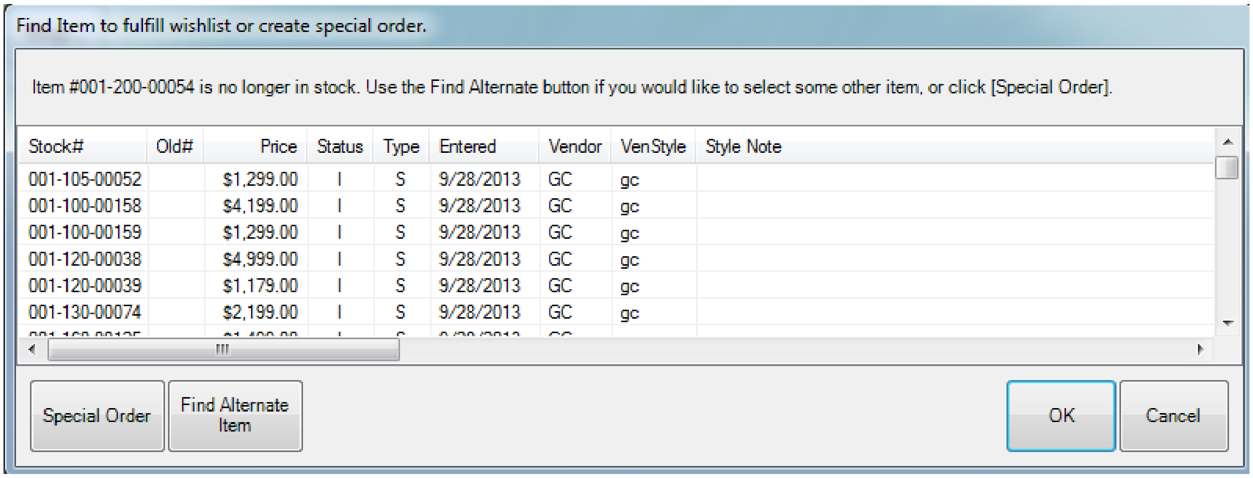
1. Open POS and perform a **Find Customer**.
2. Select **Wish List**. A list of wishes as described above will appear.
3. Locate the item to be purchased and double click the record. The **Wish List** window will appear, this time with a **Buy Now** option.



4. If the item is the desired item, select **Buy Now**. The item will be created as a sale item in the POS screen.

Alternate Items

If an item is no longer in stock, you will be prompted with a selection of alternative items.



Notice that from here, you can go directly to the **Special Order** intake or **Item Find** functions.

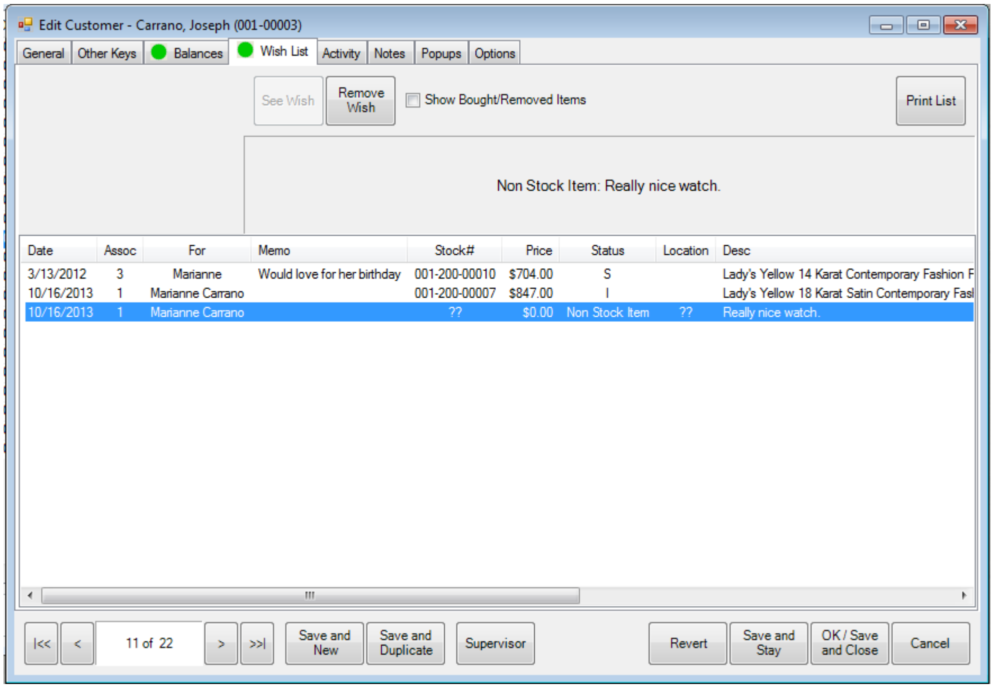
TIPS!

- **Once a special order item is created to fulfill a wish list, the system considers the wish satisfied and removes it from the customer record.**
- **If you return an item from a wish list will set the wish list item back.**

Deleting a Wish List Entry

To delete a wish list entry:

1. Locate the customer record using **Customer=>Find**.
2. Open the **Wishes** tab.



3. Select the wish to be deleted and select **Remove Wish**.

Wish List Filters and Reports

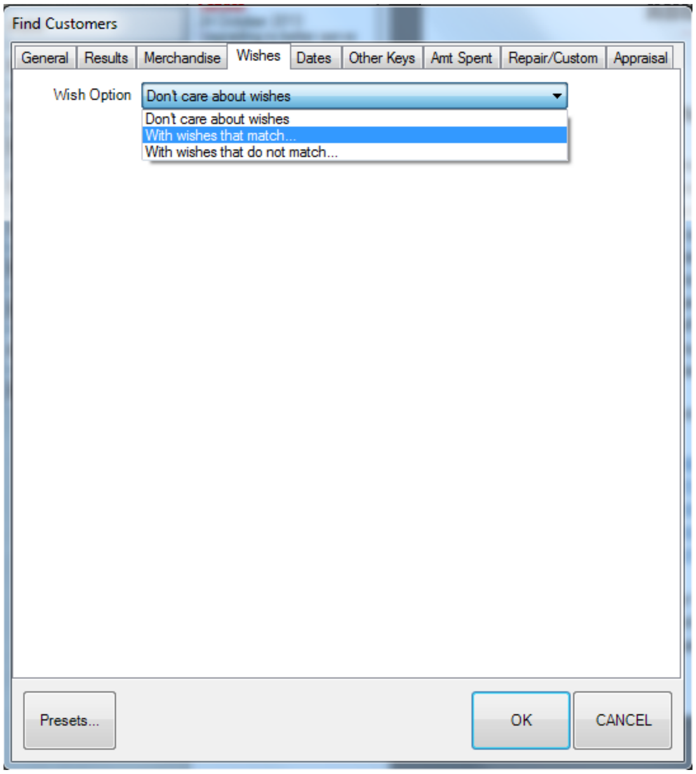
Querying wish lists and running reports are offered in three ways, but use the same basic filtering mechanism.

Find Customers by Wish Criteria

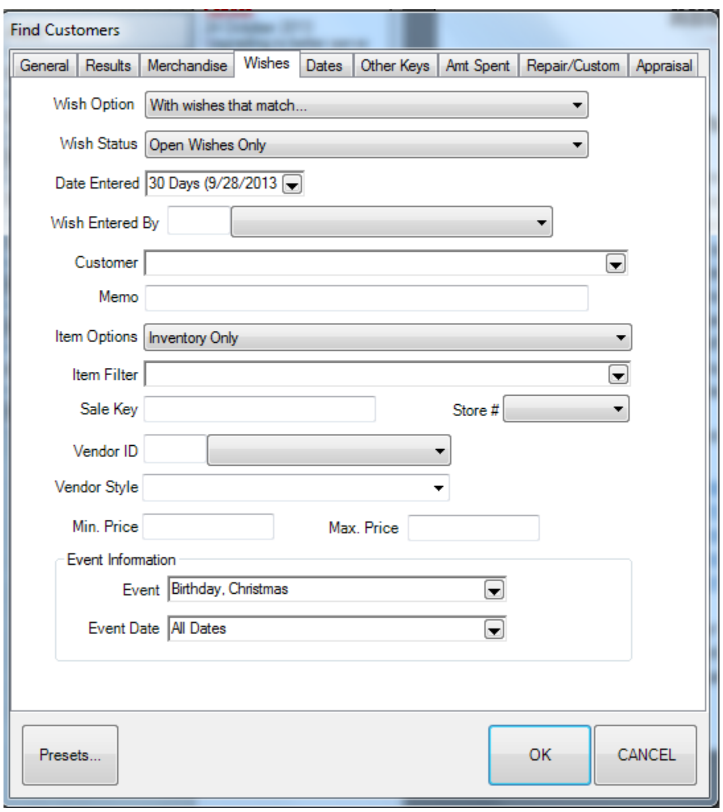
To find customers or to market to customers with a specific type of wish:

1. Select **Customers=>Find**. The **Customer Find** window will appear.
2. Select the **Wishes** tab from the filter window. In the **Wishes** tab, you will see the **Wish Option** drop-down menu, select from three options:

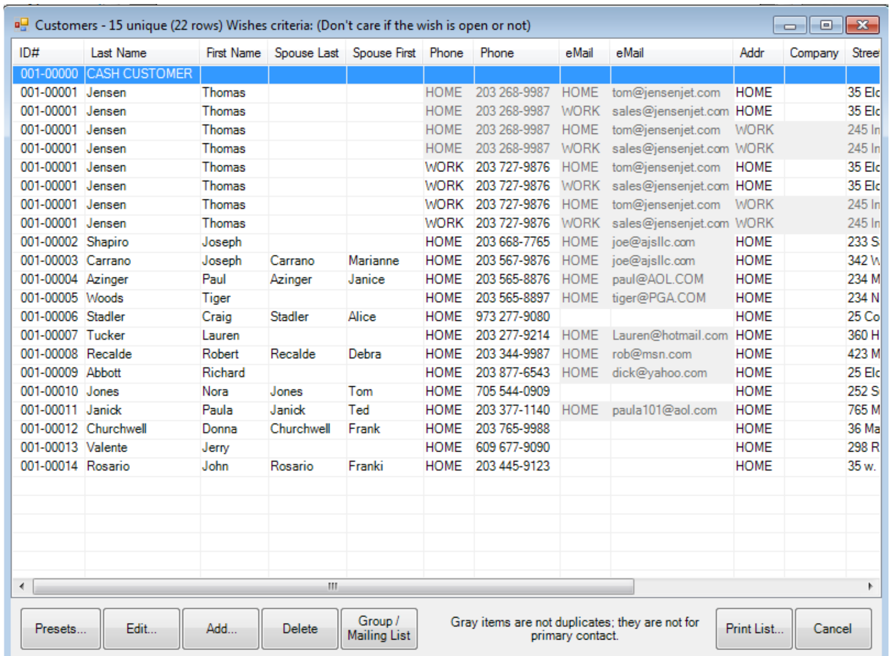
Don't care about wishes	In this case, no filtering by wishes will occur.
With wishes that match	To filter by wishes that match criteria to be specified.
With wishes that don't match	To exclude wishes with criteria to be specified.



3. Select the filtering option and select **OK**. The **Wish** filter window will appear.



4. Enter parameters that describe the wishes you're looking for.
5. Select other tabs to further narrow the kind of customer you're looking for.
6. Select **OK**. A list of customers with matching wishes will appear.

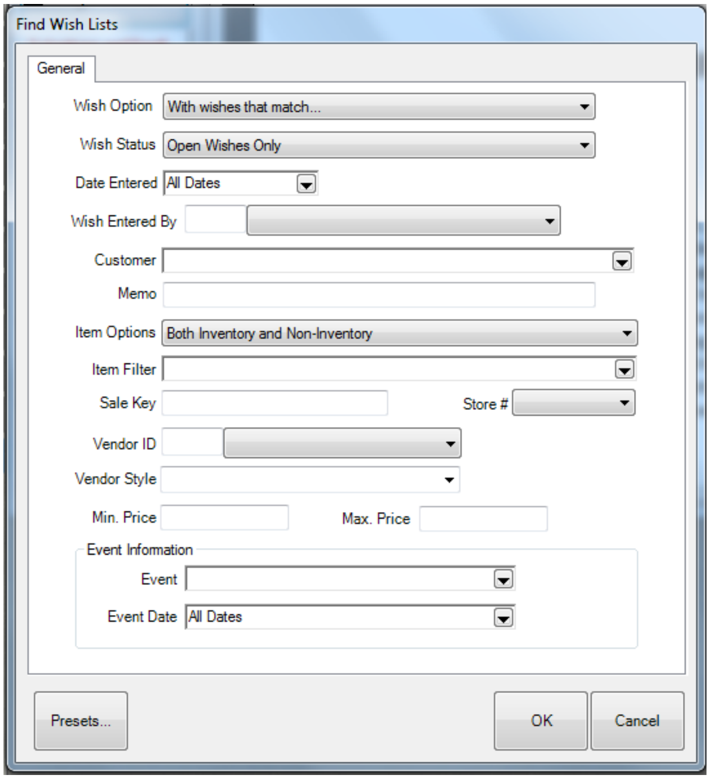


ID#	Last Name	First Name	Spouse Last	Spouse First	Phone	Phone	eMail	eMail	Addr	Company	Stree
001-00000	CASH CUSTOMER										
001-00001	Jensen	Thomas			HOME	203 268-9987	HOME	tom@jensenjet.com	HOME		35 Elc
001-00001	Jensen	Thomas			HOME	203 268-9987	WORK	sales@jensenjet.com	HOME		35 Elc
001-00001	Jensen	Thomas			HOME	203 268-9987	HOME	tom@jensenjet.com	WORK		245 In
001-00001	Jensen	Thomas			HOME	203 268-9987	WORK	sales@jensenjet.com	WORK		245 In
001-00001	Jensen	Thomas			WORK	203 727-9876	HOME	tom@jensenjet.com	HOME		35 Elc
001-00001	Jensen	Thomas			WORK	203 727-9876	WORK	sales@jensenjet.com	HOME		35 Elc
001-00001	Jensen	Thomas			WORK	203 727-9876	HOME	tom@jensenjet.com	WORK		245 In
001-00001	Jensen	Thomas			WORK	203 727-9876	WORK	sales@jensenjet.com	WORK		245 In
001-00002	Shapiro	Joseph			HOME	203 668-7765	HOME	joe@ajsllc.com	HOME		233 S
001-00003	Carrano	Joseph	Carrano	Marianne	HOME	203 567-9876	HOME	joe@ajsllc.com	HOME		342 W
001-00004	Azinger	Paul	Azinger	Janice	HOME	203 565-8876	HOME	paul@AOL.COM	HOME		234 M
001-00005	Woods	Tiger			HOME	203 565-8897	HOME	tiger@PGA.COM	HOME		234 N
001-00006	Stadler	Craig	Stadler	Alice	HOME	973 277-9080			HOME		25 Co
001-00007	Tucker	Lauren			HOME	203 277-9214	HOME	Lauren@hotmail.com	HOME		360 H
001-00008	Recalde	Robert	Recalde	Debra	HOME	203 344-9987	HOME	rob@msn.com	HOME		423 M
001-00009	Abbott	Richard			HOME	203 877-6543	HOME	dick@yahoo.com	HOME		25 Elc
001-00010	Jones	Nora	Jones	Tom	HOME	705 544-0909			HOME		252 S
001-00011	Janick	Paula	Janick	Ted	HOME	203 377-1140	HOME	paula101@aol.com	HOME		765 M
001-00012	Churchwell	Donna	Churchwell	Frank	HOME	203 765-9988			HOME		36 Ma
001-00013	Valente	Jerry			HOME	609 677-9090			HOME		298 R
001-00014	Rosario	John	Rosario	Franki	HOME	203 445-9123			HOME		35 w.

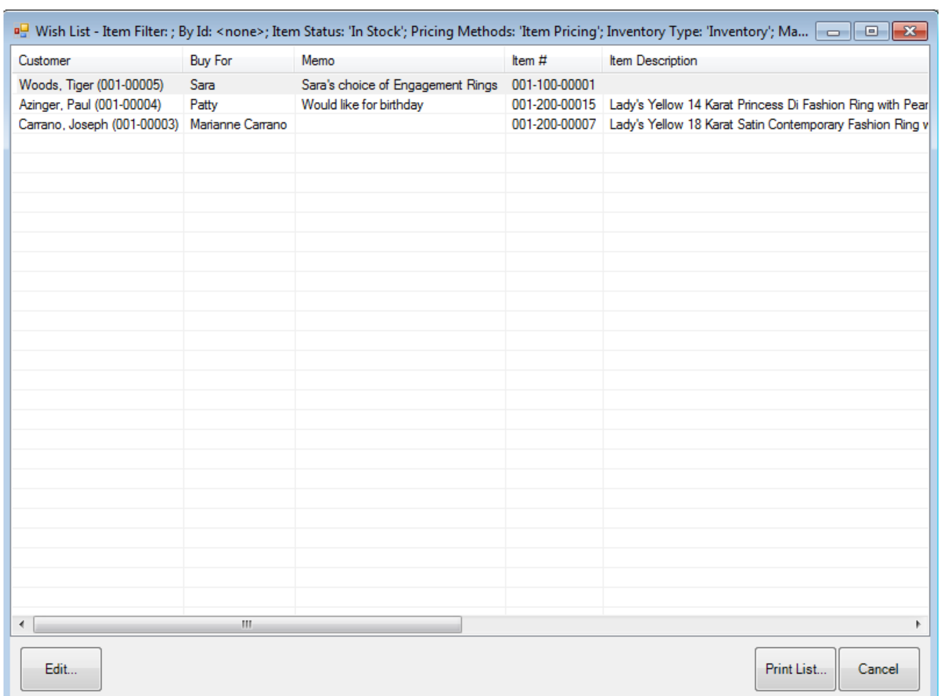
Find Wish Lists

Useful for maintenance, purchasing, follow up calls, etc., you find the wish lists themselves rather than the customers that match. To do so:

1. Select **Customers=>Wishlists=>Find**. The **Find Wish Lists** window will appear.



2. Enter parameters that describe the wishes you're looking for.
3. Select **OK**. A list of customers with matching wish lists will appear.

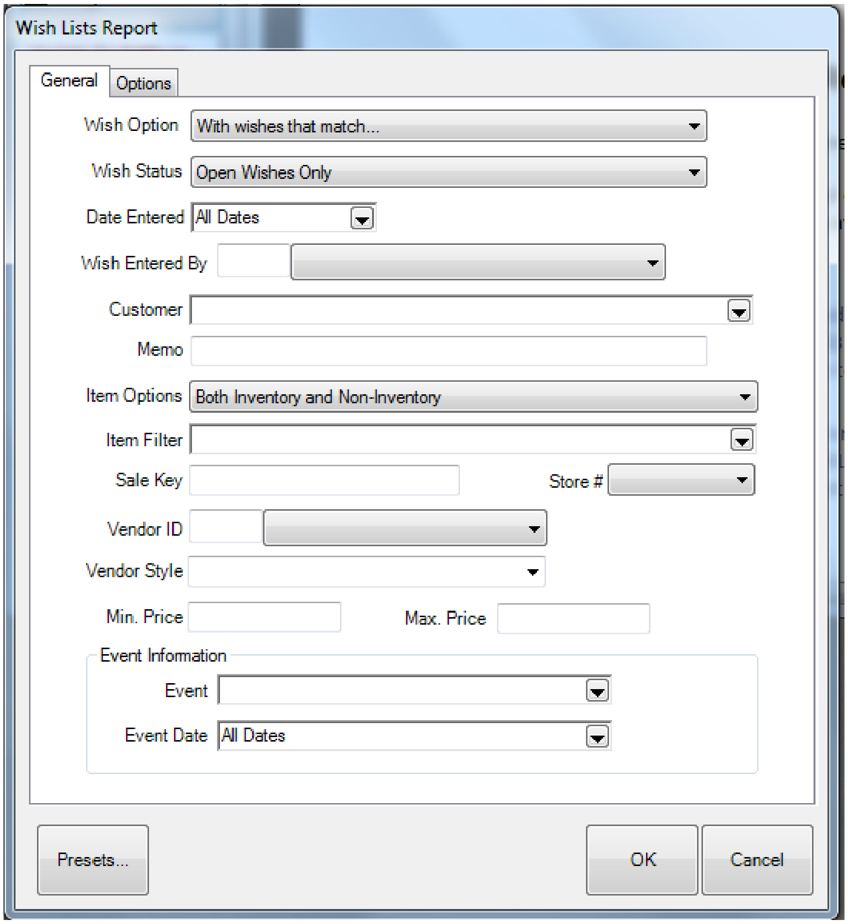


Reports

Similar to the **Wishlist=>Find**, but in report form, **Reports=>Customers=>Wishlists** with Group/Sort functions.

To get a wish list report:

1. Go to **Reports=>Customers=>Wish Lists**. The wish list filter will appear.



2. Using the filters, indicate what kinds of wishes should appear on the report.

Best Practices and Tips

Here are some ways wish lists can be used.

- Conveniently save to a wish list a collection of items a customer has shown interest in.
- Enter Wish List Entry Mode where you can add in-stock items, non-stock items, and even generic wish list entries:
    - Example: A vendor/vendor style number that is available but the store has never stocked it.
    - Example2: Customer desires ½-carat diamond studs, but there is no specific vendor, item, etc.

- Store event type and date information while adding a wish list:
    - Event and date information will update on the customer's account record
    - If date on an event differs from that shown in the customer record, you will be prompted to update it.
- Notifications allow you to set "who to notify" and "how to notify" while entering wish lists:
    - Notifications can be sent automatically via email or SMS (text) with required setup
    - Adding a new contact method for notification automatically updates contact record for account.