

# Edge 23.3 Beta

## Introduction

Welcome to the Edge 23.3 Beta Test!

Thank you for participating – your feedback is valuable.

During the duration of this beta, any beta feedback or problems should be sent directly to [Beta@ajsllc.com](mailto:Beta@ajsllc.com). This is a monitored email and our dedicated beta team will respond with a call or email depending on the situation.

The beta team **can only assist** with beta related issues. Regular issues would still need to go through our regular Support team.

## What's new?

### POS Customer Overlay

We have added a new, optional, overlay to POS. This is our first step towards redesigning the POS. As we understand POS is a critical aspect of your business, this feature is **optional** and can be enabled/disabled at any time via a **System Option**.

The screenshot displays the POS Customer Overlay for Dominick Mastri (001-30912). The interface is divided into several sections:

- Customer Information:** Associate, Customer #001-30912, Dominick Mastri, 70 Colony St, Seymour, CT 0648, (203) 430-6303, dmastrid@gmail.co, 7 21180 20.
- Account Summary:** Total # Balances: 12, Balance Total: \$12,386.50, Ready For Pickup: 3, Payments: 11.
- House Account:** House Account Customer, Credit Limit: \$10,000.00, Special Interest Rate, Min Payment, Never Send Statement.
- Transactions Table:**

Line	Item #	Balance Type	Sale #	Balance	Date Created	Most Recent	Complete	Description
		Repair	001-78568-002	\$89.00	9/25/2023	9/25/2023	No	test
		House Account	001-30912	\$7,045.00	9/5/2023	9/11/2023		House Account
		Repair	001-78547-001	\$0.00	9/8/2023	9/12/2023	Yes	Classic Solitaire Engagement Ring Crafted From 14 Karat Wh
		Repair	001-78564-001	\$49.00	9/12/2023	9/12/2023	No	Salt and Pepper Halo Engagement Ring Crafted From 14 Kar
		Custom	001-78547-003	\$1,975.00	9/8/2023	9/12/2023	No	Diamond Cluster Ring Crafted From 14 Karat White Gold. Thi
		Appraisal	001-78547-004	\$30.00	9/8/2023	9/12/2023	No	Appraisal: Classic 3 Stone Engagement Ring Crafted From 14
		Special Order	001-78560-001	\$29.50	9/12/2023	9/12/2023		LACQURE ROSE CREAM WITH GOLD TRIM
		Repair	001-78565-001	\$110.00	9/13/2023	9/13/2023	Yes	repair intake
		Repair	001-78566-001	\$99.00	9/13/2023	9/13/2023	Yes	repair

The interface also includes a sidebar with navigation options: General, Sizing, Other, Balances, Merch, Activity, History, Wish, Notes, Oppos, and Apps. At the bottom, there are buttons for Cash, Gift Cert, Check, Tender/Reward Card, Credit Card, Layaway, Add Task, Clientele, Profile, and Quotes.

It includes all of the tabs found on the Customer Record in a new format with additional capabilities.

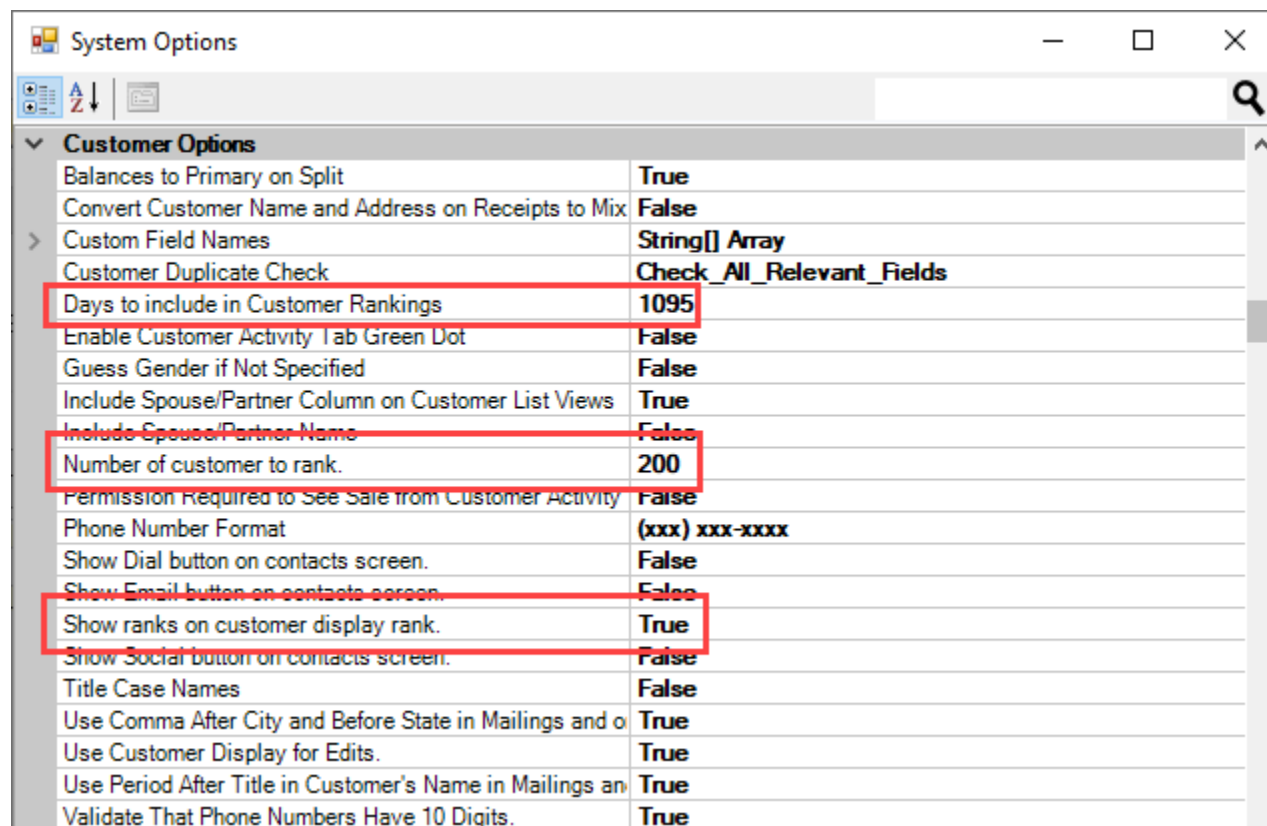
We are purposefully being a bit vague here because part of this test is about usability and we want to see how much of the redesign is intuitive.

**To enable this feature:**

1. Click **Administrative > System Options**.
2. Scroll down to the **POS Options Scheme** section.
3. Set the option **Show Customer Display** to **True**.
4. Open POS – the new sidebar should appear and will light up when a customer is loaded.

**NOTE:** This can be disabled at any time.

Additionally, there are three new **System Options** that control the **Rankings** that display on the **General** tab.



System Options	
<b>Customer Options</b>	
Balances to Primary on Split	True
Convert Customer Name and Address on Receipts to Mix	False
Custom Field Names	String[] Array
Customer Duplicate Check	Check_All_Relevant_Fields
Days to include in Customer Rankings	1095
Enable Customer Activity Tab Green Dot	False
Guess Gender if Not Specified	False
Include Spouse/Partner Column on Customer List Views	True
Include Spouse/Partner Name	False
Number of customer to rank.	200
Permission Required to See Sale from Customer Activity	False
Phone Number Format	(xxx) xxx-xxxx
Show Dial button on contacts screen.	False
Show Email button on contacts screen.	False
Show ranks on customer display rank.	True
Show Social button on contacts screen.	False
Title Case Names	False
Use Comma After City and Before State in Mailings and o	True
Use Customer Display for Edits.	True
Use Period After Title in Customer's Name in Mailings an	True
Validate That Phone Numbers Have 10 Digits.	True

## GemLightBox Integration

The integration has been revamped to directly connect to GemLightBox's web API. This makes transferring images much easier and also gives you access to using their AI description generator.

Read more here: <https://edgeuser.com/Knowledge/Knowledge-Base/beta-beta-features-gemlightbox-by-picup-media-overview-of-gemlightbox>

## New Customer Contact Method – Social

This can be enabled to add a new contact method type for capturing social media information. Note at this time it is strictly for storing this information and does not yet tie out to anything on their platforms.

If you want to use this, first you must enable the **System Option**:

Customer Options	
Balances to Primary on Split	True
Convert Customer Name and Address on Receipts to Mix	False
Custom Field Names	String[] Array
Customer Duplicate Check	Check_All_Relevant_Fields
Days to include in Customer Rankings	1095
Enable Customer Activity Tab Green Dot	False
Guess Gender if Not Specified	False
Include Spouse/Partner Column on Customer List Views	True
Include Spouse/Partner Name	False
Number of customer to rank.	200
Permission Required to See Sale from Customer Activity	False
Phone Number Format	(xxx) xxx-xxxx
Show Dial button on contacts screen.	False
Show Email button on contacts screen.	False
Show ranks on customer display rank.	True
Show Social button on contacts screen.	False
Title Case Names	False
Use Comma After City and Before State in Mailings and o	True
Use Customer Display for Edits.	True

Next, set up the types of social media (Instagram, Facebook, etc) that you will be collecting:

1. Click **Administrative > Advanced Settings > Social Contact Methods**.
2. **Add** the methods you will be collecting.

Now on the **Customer Record** you will see a new button to capture this information.

Method	Type	Who	Contact Address
	Cell	Dominick	(203) 430-6303
	Home	Dominick	dmastri@gmail.com
	Home	Dominick	70 Colony St Seymour, CT 06483
	Facebook	Dominick	https://www.facebook.com/ dominick.mastri.7

+ Address
+ Phone
+ Email
**+ Social**
SMS Card

### Customer History

A new **Customer History** tab has been added that separates out some of the data that was displaying under **Customer Activity**, such as notifications.

### Special Order History

A new tab has been added to Special Order records displaying their history.

**Dashboard – Honor Wish Splits**

Dashboard tiles now honor wish list commission splits and follow the way you have them configured in System Options.

**Service Photos – Option to Save to Subfolders**

A new option was added under **General Options** called 'Service Images Save to Service Folders'; if enabled, any service job photos will be saved under subfolders instead of being saved to your main Photos folder.

**Receipts – Repair Task Formatting**

Repair task descriptions have been improved to look cleaner on the receipt.

**PO Print – Contacts Labeled**

Purchase Order phone, contact, account number are all now labeled.

**Report Grouping Options – Folio and PO**

Inventory reports can feature two new grouping options: by folio # and by PO #.

**Report Options – Serial Numbers**

Serial numbers can now be included on inventory reports.

**Joined Items – Can Now Include Builds**

You can now include built items in a joined item.

**Notification Option – Do not Notify Until All Jobs Complete**

A new option was added under **Notification Options** called 'Multiple Services Notifications Options'; this controls what happens when there are multiple jobs of different types that are set to notify.

**Item Move – Vendor Barcodes**

Support was added to move an item's location using a vendor barcode.

**Physical Inventory Scan – Larger Photo**

The photo displayed at the top of this form is now larger.

**Rapid Reorder Report – Page Breaks**

This report can now include page breaks.

**Associate Task Report – Clickable Links**

You can now click on the tasks on this report to open the associated task record.

**Commission Report – New Options**

There are new options on this report so that you can hide commission percentages as well as include cost.

**Item Record – Copy From**

The Copy From button has been restored.

**Service Jobs – ETA Estimated by Default Option**

A new option was added under **General Options** called 'Make All ETAs Estimated by Default'; if enabled, the **Estimated** checkbox will automatically be checked on all job intakes.

**EDT/ECon – Exclude Items with No Web Titles**

There is a new option in EDT/ECon that can be enabled if you want to automatically exclude any item that does not have a web title from being uploaded.