

# Edge/Podium Enhanced Integration

## Introduction

At the heart of the integration is the next version of our Edge Connector (ECon) app. This app was developed to synchronize Edge with third-party platforms utilizing their native APIs. First used to power our Shopify integration, ECon has been in use for almost two years and has proven itself to be a stable, robust, and mature solution.

The Edge + Podium integration has been enhanced to include both **unidirectional** and **bidirectional** data synchronization between Edge and Podium, utilizing the Edge's existing **Econ** service. This integration is available to **ALL Podium** customers as an **add-on service requiring initial sign-up directly through Podium**.

This integration upgrade includes your choice of **two** available tiers: **Clienteling** and **Clienteling+**.

**Both** tiers provide you with the ability to sync new and existing customer Contacts, Sales History, Appointments, and Service Job status updates. The **Clienteling+** tier is expanded to include Items with an Item section searchable by Edge Item Number. Podium then uses their AI generator to craft a title and description for your inventory items.

## Getting Started

This enhanced integration is available to **ALL Podium** customers as an **add-on service requiring a subscription upgrade directly through Podium**. They will alert our **Administrative** team about your upgrade and will then issue you a new **Edge license** via email. The newly issued license must be installed prior to using the enhanced Podium Integration in Edge. Installation steps are **included** with your license.

To learn more about **the two available Clienteling tiers** and to sign-up, please visit Podium's website:

<https://www.podium.com>

## What data is synchronized?

### Customers – (Clientele & Clientele+)

Multiple Customer sync options are available with this integration. Customers that are set to synchronize will transmit some data unidirectionally (one way flow) and some data bidirectionally (changes go back and forth).

- Upload **ALL Customers** to Podium and **download all Customers** back into Edge. **[bidirectional]**
- Upload **ALL Customers** to Podium **without downloading Customers** back into Edge. **[unidirectional]**

In Podium, newly added customers are automatically downloaded to Edge. Before adding them as a new record, ECon attempts to match to an existing Edge customer based on email to prevent duplicate entries. Customers originating from Podium in this manner are automatically set to synchronize.

The screenshot displays the Podium interface. On the left, a 'Contacts' list shows various customer records with columns for Name, Phone, Email, Status, Date Added, and Tags. The top right of the interface shows a detailed view for a customer named 'Test Customer'. This view includes a total amount of \$1,400.00, a payment record for August 26, 2024, and a list of activities, including a 'Paid' activity on the same date. Below the activities, there are sections for 'PAYMENT METHOD' (Cardholder Name, Type, Last 4 Digits), 'INVOICE DETAILS' (Location, Invoice Number, Items Purchased), and 'Additional Details' (Associate ID, Unit Price, Contact ID, Item ID, Sale Number, Transaction Date).

Customer information that synchronizes includes:

### Contact Methods (Phone/Email/Address) **[bidirectional]**

- Edge Customer Contact Methods upload to Podium.
- Contact Method changes made in Edge will overwrite (update) the Podium customer data.
- Contact Method changes made in Podium will import as new Edge contact methods rather than updating/erasing existing.
  - For example, if you change a customer email address on Podium, we will import that change to Edge as a new contact method instead of updating the original value. This is intentional to prevent data loss in the Edge.
- Changes made in Edge upload to Podium and vice-versa for New Customers:
  - Acquisition (the first why-in) is the exception. It will upload from Edge to Podium, and will download from Podium for new customers, but changes made in Podium will not overwrite your original Acquisition in Edge. Any new customers in Podium not in Edge will have that acquisition for the first time. That's how a new customer is distinguished from the Podium side.

### Edge Sales History = Podium Client Purchases **[unidirectional]**

- Edge Sales History uploads to Podium Client Purchases.

## Appointments – (Clientele & Clientele+)

**Appointments** created for Customers in Edge can be managed through your Podium portal with full details showing you when Appointments were created, updated, and completed. You can view the full history of an Appointment by visiting the **Activity Timeline** on a customer's page directly through Podium.

## Edge Appointments = Podium Customer Account [unidirectional]

- Edge **Appointment** updates upload to Podium Client Activity Timeline.
- Clicking on the Appointment through the Client Activity Timeline brings up the full Appointment details.

## Services – (Clientele & Clientele+)

Service Job updates are sent to Podium with **Not Ready**, **Done**, and **Picked Up** statuses. You can view the full history of a Service Job by visiting the **Activity Timeline** on a customer's page directly through Podium including summary, date entered, description, and more.

### Edge Service Job Updates = Podium Customer Account [unidirectional]

- Edge Service Job updates upload to Podium Client Activity Timeline.
- Clicking on the Service Job through the Client Activity Timeline brings up the full Service Job details.

The screenshot displays two views of a customer's service job history. On the left, the 'Activity Timeline' for 'Test Customer' (203) 909-1800 shows recent activity: 'Job is ready for pickup' (0m), 'Payment completed' (2m), 'Appointment Scheduled' (7m), and 'Job Not Ready' (4h). On the right, a detailed view of the 'Job is ready for pickup' update (11:10 AM, Aug 26, 2024) is shown. This view includes an activity log with 'Job Ready For Pickup' (11:10 AM) and 'Job Not Ready' (7:02 AM), a summary stating 'Repair Job has been moved to ready for pickup status', and job details such as Job Type (Repair), Description (Watch Battery Replacement), Sale Number (001-00014), Job Number (001-00014-001), Entered Date (Aug 26, 2024 11:02 AM), Customer Key (001-00023), and Status (ReadyForPickup).

## Items (Exclusive to Clientele+ Tier ONLY)

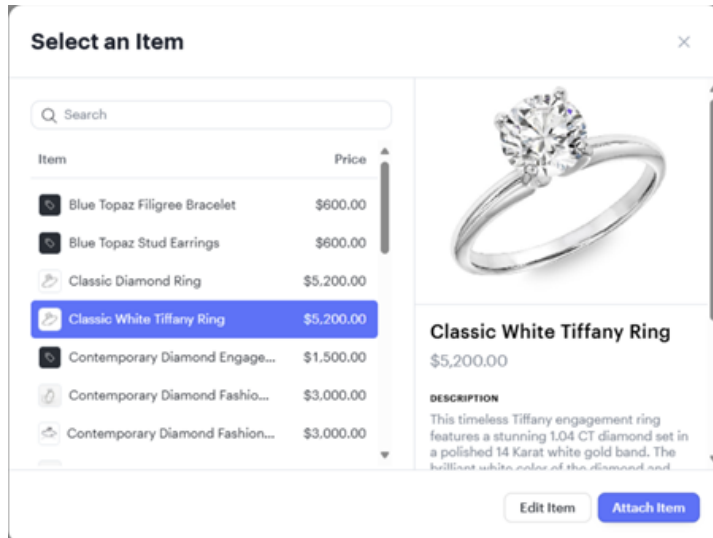
Subscribers of Podium's Clientele+ will gain access to Edge Item data synchronization. Item details are uploaded to Podium where you will find an Item section searchable by Edge Item Number. Podium then uses their **AI generator** to craft a **title** and **description** for your inventory items. Edge items are uploaded to **Podium** as Products. Please note, Item synchronization is unidirectional *only*. Item titles and descriptions do not download back into Edge.

## On Hand Inventory [unidirectional]

- On hand Edge inventory is uploaded as Podium Products.
- There are filters available to exclude specific categories, vendors, and/or inventory types (memo, consignment, trade, etc).

## Sold Inventory [unidirectional]

- If you upload an Edge Customer's Sales History, any related sold items are uploaded to Podium Archived Products.
  - Includes sold (picked up) special orders.



## How does it work?

ECon is installed and configured on the server at your store. This installation is performed by Podium.

After settings are specified, an initial full upload is performed. Depending on the number of customers selected for synchronization, and the amount of other data being included (wish lists, sales, etc), this may take several hours.

Once the initial full upload is completed, the ECon service is activated and will automatically synchronize changes between Edge and Podium every 15 minutes.

## Notifications

In addition to synchronizing data, the Edge/Podium integration also gives you the option to use Podium as your SMS provider, a feat. This means all text message notifications sent directly from the Edge would utilize the Podium backend to send.

- Notifications are not sent to Podium's app and will not appear on their platform. This strictly relates to how the text messages are being sent on the backend.