

Podium Invoice

Overview

Exclusive for Edge versions **23.2.8 or higher**, the **Podium Invoice** feature allows you to send invoices to your customers via **text** or **email** as an alternative to processing a payment immediately to complete a sale in POS. The customer will receive an invoice with a link to **pay directly** through the **Podium** website. This integration allows you to then load the paid invoice back into POS to complete the sale through Edge.



You must be a **Podium** customer to use this feature. Existing **Podium** customers must also sign up for this feature directly with Podium. Please see the section below on **Getting Started** for more information on signing up for Podium and signing up for the **Podium Invoice** feature.

Getting Started

Podium Invoice is a licensed-based Edge integration requiring an initial sign-up through **Podium**. They will alert our **Administrative** team about your subscription who will then issue you a new **Edge license** via email. The newly issued license must be installed prior to using this feature in Edge. Installation steps are **included** with your license.

Follow the link below to speak with a Podium representative about activating this feature:

[Request Podium Integration with The Edge](#)

Setup

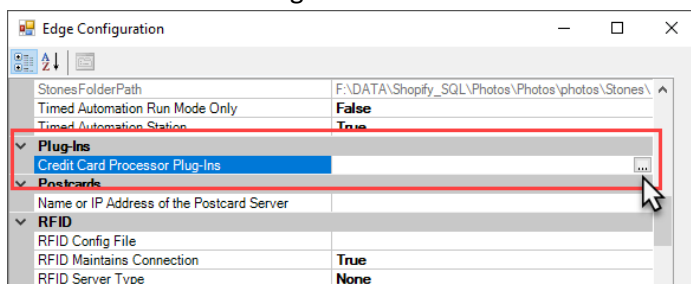
After you have successfully installed your new license, you must **Configure** and set the **System Option** for **Podium** which will activate the POS buttons and then create your **invoice notification templates**.

Configuration

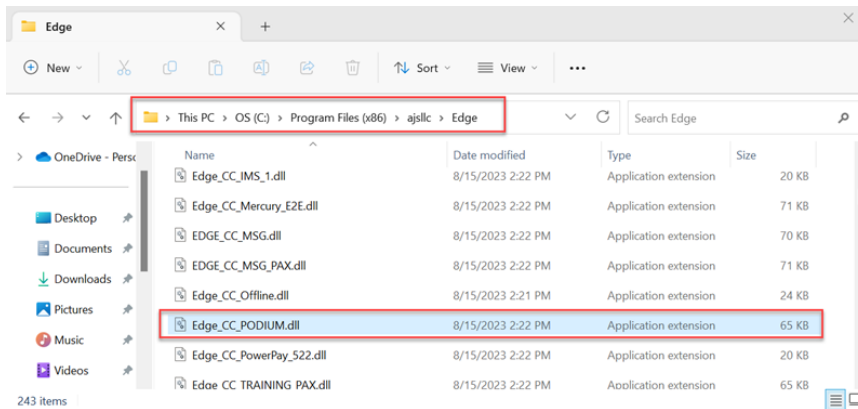
This is an important first step for using this feature and must be done on **each workstation** with a credit card reader attached.

To set the Podium DLL:

1. Navigate to **Administrative > Configuration**.
2. Scroll down to the **Plug-Ins** section and click on **Credit Card Processor Plug-Ins**, then click the button with the **3 dots** to the right.



- The **Open File** window will open. Navigate to the folder **C:\program files (x86)\ajslc\Edge** and select the file **Edge_CC_Podium.dll**, then click **Open**.

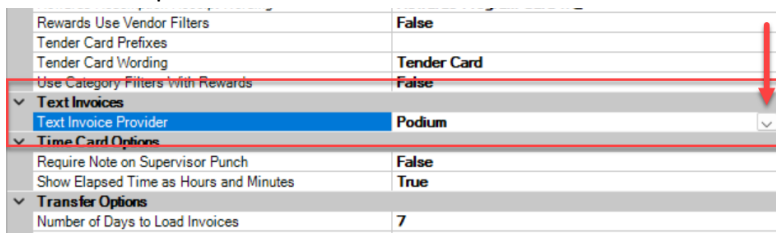


- Click OK to save your configuration change.

System Option

To set the System Option:

- Navigate to **Administrative > System Options**.
- Search** or **scroll** down to the **Text Invoices** section and locate the option named **Text Invoice Provider**.
- Click the drop-down arrow and select **Podium**.



- Click OK to save your changes.

Notification Templates

The **Podium Invoice** feature allows you to customize notification templates for invoices sent by text, email, or both. The Edge will **automatically** apply the system **default templates** included with Edge if you choose not to create your own, those of which you can choose to **edit** to create a more customized message or create **customized templates from scratch** right within the body using **HMTL** and available **merge fields**.

See the [Notification Templates](#) documentation for step-by-step instructions on creating templates and instructing Edge to use your templates when sending invoices.

The **default** notification templates included with Edge will include the **Podium** payment link as shown in the example below:

Editing Template

Name* Podium Invoice SMS Copy From

Type* Invoice (Customer)

Body* `{{Store.Name}}: Invoice ready for payment TheURL. To opt out, reply STOP`

- Customer
 - FirstName
 - LastName
- Store
 - Name
 - PhoneNumber
 - Address
 - Street1
 - Street2
 - State
 - City
 - Zip
- Merge Fields
 - TheURL

Preview Load Default Values Save & Close Cancel

If you are creating **custom** templates from scratch, you must **manually** add the **merge field** into the body of your template for the link to be included:

Editing Template

Name* Podium Invoice Email Copy From

Type* Invoice (Customer)

Email Subject* `{{Store.Name}} - Invoice ready for payment`

Body*

```
<tr>
<td class="singleLine"></td>
</tr>
<tr>
<td class="fillerRow"></td>
</tr>
<tr>
<td>Greetings {{Customer.FirstName}} {{Customer.LastName}},</td>
</tr>
<tr>
<td class="fillerRow"></td>
</tr>
<tr>
<td>Your payment link from {{Store.Name}} is below. If you have any questions please do not hesitate to reach out to us.</td>
</tr>
<tr>
<td class="fillerRow"></td>
</tr>
<tr>
<td><a href="{{TheURL}}">Click here to pay</a></td>
</tr>
<tr>
<td class="fillerRow"></td>
</tr>
<tr>
<td class="fillerRow"></td>
</tr>
<tr>
<td class="storeCell">{{Store.Name}}</td>
</tr>
<tr>
<td class="storeCell">{{Store.Street1}} {{Store.Street2}} {{Store.City}}, {{Store.State}} {{Store.Zip}}</td>
</tr>
<tr>
<td class="storeCell">{{Store.PhoneNumber}}</td>
</tr>
</tr>
```

- Customer
 - FirstName
 - LastName
- Store
 - Name
 - PhoneNumber
 - Address
 - Street1
 - Street2
 - State
 - City
 - Zip
- Merge Fields
 - TheURL

Preview Import HTML File Load Default Values Save & Close Cancel

Text to Invoice at POS

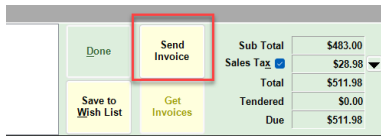
The **Podium Payments** feature is **only** available when the following sale lines are added in POS:

- Item Purchase
- Misc Charge
- Payments for: Appraisal, Layaway, Memo, Repair, Special Order, Custom Job, and Store Charge

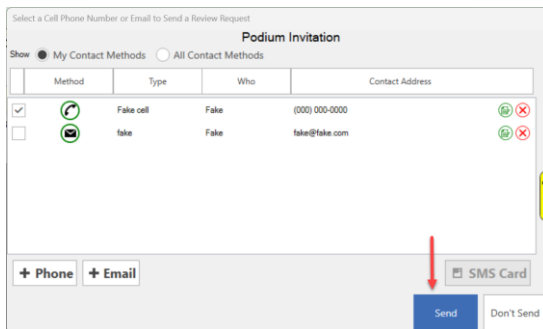
Please note that the **Text to Invoice** feature is **NOT** available for any **pickup** and/or **job intake** if the intake is the only line added to a sale.

Selling at POS with Podium Payments

Selling items at POS with **Podium Payments** works just like any regular item sale at POS. You will **find the customer** and **select the associate**, as normal, then **find/scan the item** to be sold. Instead of clicking **Done** to complete the sale, you will instead choose **Send Invoice** from the buttons shown below:

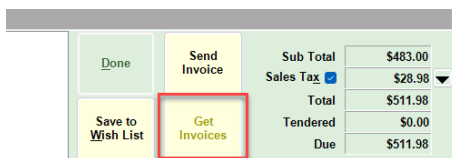


The **Podium Invitation** screen will appear asking you to choose where to send the invoice. Choose either a **cell phone** or **email** and click **Send**:



Edge will alert you that the invoice has been **sent**, and the customer will receive their text message or email with the payment link to pay directly through **Podium**.

After the customer pays you can process their payment at POS using the **Get Invoices** button.



This will bring up **Podium Sales Selection** window with a list of both **Paid** and **Not Paid** invoices. Highlight the **Paid** invoice you'd like to process through POS and click **Select**.

Customer	Sales Amount	Status	Sold Date	Podium Sale Id
██████████	\$159.53	Paid	8/23/2023	7bd8fce5-b0a0-44da-9dc5-d74abccb3004
██████████	\$106.35	Paid	8/23/2023	47872ab9-1824-48b9-acac-07f4f8daedfc
██████████	\$212.70	Not Paid	8/23/2023	8d258cb5-a578-42d5-93a7-673cb33a63f1



The **Get Invoices** button will **ONLY** be available if you **DO NOT** have a **Customer** selected. If you **DO** enter a **Customer**, the button will automatically be grayed out. This is a security measure as all open invoices will display and are not tied to a specific customer until paid.