

# What's New in 2024 – Associates

## Introduction

A series of exciting updates have been added to **Associates** beginning with **Edge version 24.1** designed to make managing your associates easier than ever before.

## System Option

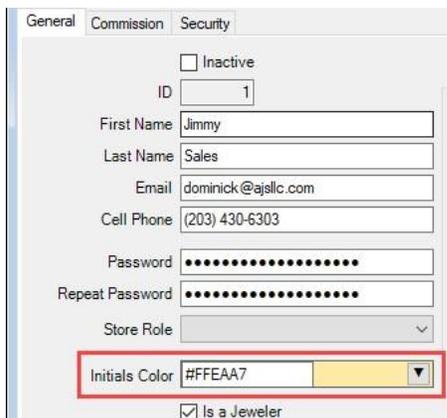
A new **System Option** was added giving you more control over **Task Notifications**. This option can be found by going to **Administrative > System Options > Tasks**, or by **searching** the option listed below.

- **Done Task Default Notify** – Defines how the associate that created the task gets **notified** when the task is **completed**. This **System Option** goes together with the existing ‘**New Task Default Notify**’ that defines how an associate is notified when a task is **assigned** to them. Notification options include **Text**, **Email**, or **Do Not Notify**.

## Associate Schedule – Color Coded Shifts

The **Associate** Schedule now **color codes** associate shifts based on their **Initials Color** setting. This feature was first introduced with the **Notes** revamp feature where it defines what color to use for associate initials found on **Notes**.

- Navigate to **Administrative > Associates > Associate List** and select the **Associate**. Locate the **Initials Color** box on the **General** tab to set an associate’s **Initial Color**.



The screenshot shows the 'General' tab of an Associate's profile form. The 'Initials Color' field is highlighted with a red box. The field contains the hex color code '#FFEEA7' and a color selection dropdown menu. Other fields visible include 'Inactive' (checkbox), 'ID' (text box with '1'), 'First Name' (text box with 'Jimmy'), 'Last Name' (text box with 'Sales'), 'Email' (text box with 'dominick@ajsllc.com'), 'Cell Phone' (text box with '(203) 430-6303'), 'Password' and 'Repeat Password' (password fields), 'Store Role' (dropdown menu), and 'Is a Jeweler' (checkbox).

## Time Card Updates

### Tracking Associate Punches

Several key changes have been made to the **Time Card** feature that improve how you **track** and **manage** associate punches.

- Managers can now **Add**, **Edit**, and/or **Delete** punches.
- Edge now tracks associate **punch changes** and will display them on the **Security Log Report**.

## Run Report Button

A **Run Report** button was added to the bottom of the **Time Card Punch list** that, when clicked, will open the **Security Log Report** with the **Time Card defaults** automatically selected.

## Task Done Notification

### Task Completed

A **Task Completed** option was added to both **Notification Templates** and **Template Admin** so notifications for completed tasks can be customized the same as others.

See the [Notification Templates](#) section of EdgeUser for documentation and videos detailing how to customize and manage your templates.

### Done Task Default Notify

See the **System Option** section above for more information on the new **Done Task Default Notify** option that controls how associates are notified when a task is completed.

## Wish Associate

The **Associate** that entered a **Wish List** item for a customer will now be displayed in the **Associate** box on the **Wish** record.

Wish List For: Obrien, Katie (001-00006)

Item Information

Item #: 001-210-1000001

Vendor ID: WEM Weimar Designs

Vendor Style: Earring-Ruby18k

Description: Lady's Yellow Matte 18 Karat Medium Hoop Earrings With 2-1.70Twt Cushion Red Strong Rubys

Price Range: Min: Max:

Associate: Sales, Jimmy (#1)

Comments

Comments:

Customer Information

Who's Wish List is this? Katie Obrien

Who should be notified about this item? Michael Obrien Different Customer

Notify: Text (203) 650-1234

Event Information

Event: Valentine's Day

Event Date: 2/14

Navigation: |<< < 26 of 29 > >> | Quote Add Task Add Oppo Save & Stay OK / Save & Close Cancel