THE EDGE®

Automated Notification and Receipt Setup

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Introduction

Customers can opt to receive notifications of completed services via email or text. This document explains how to select headers, footers, subjects, and body text to be sent. Once these items are setup and selected in Administration, each time you send an email or SMS notification, the default text is already supplied.

Best practices

You might want to define the headers, footers, subjects, and body text as described in this document before using the Administration functions to assign them. You can create headers, footers, subjects, and body text to promote specials, include holiday greetings, include store hours, include store logos, and other messages.

Email Administration

For email notifications, for each kind of service notification, you can select the header, footer, subject line, and greeting to automatically populate emails. To do so:

1. Select **Administrative=>Notifications=>Email Administration**. The **Email Administration** window will appear.
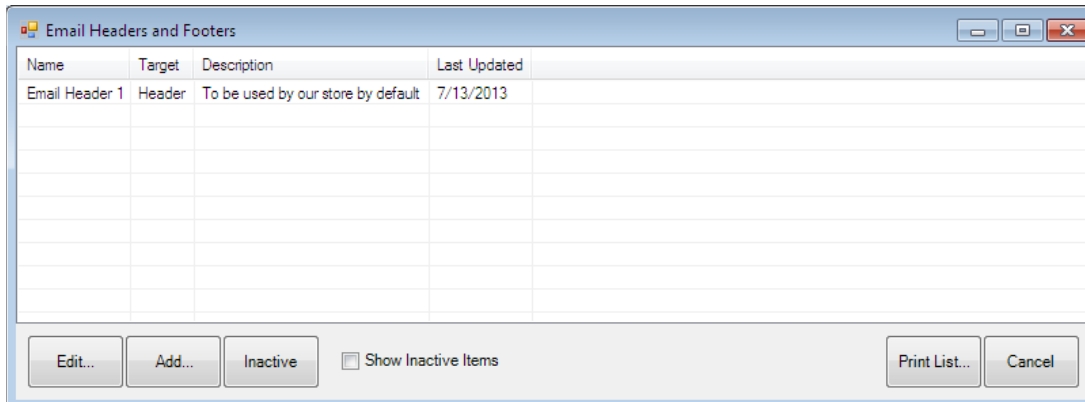

2. Select the content as desired.
3. Select **OK/Save and Close**.

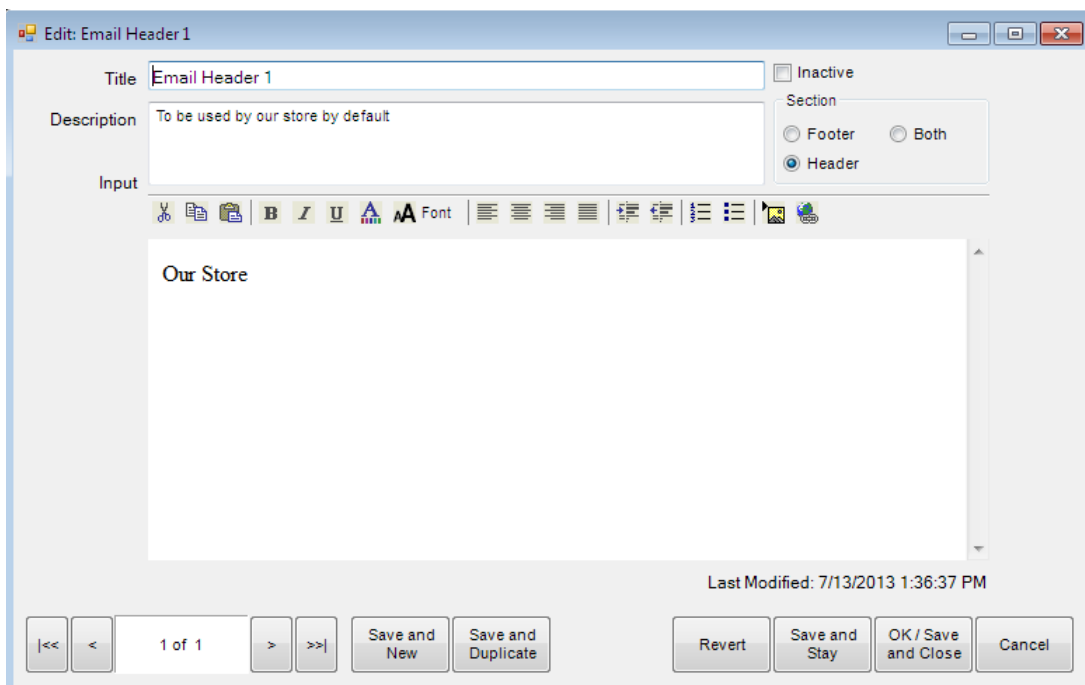Defining the content of these items is described in the sections below.

Email Headers and Footers

To define the content of headers and footers:

1. Select **Administrative=>Notifications=>Email Headers and Footers**. The **Email Headers and Footers** window will appear.

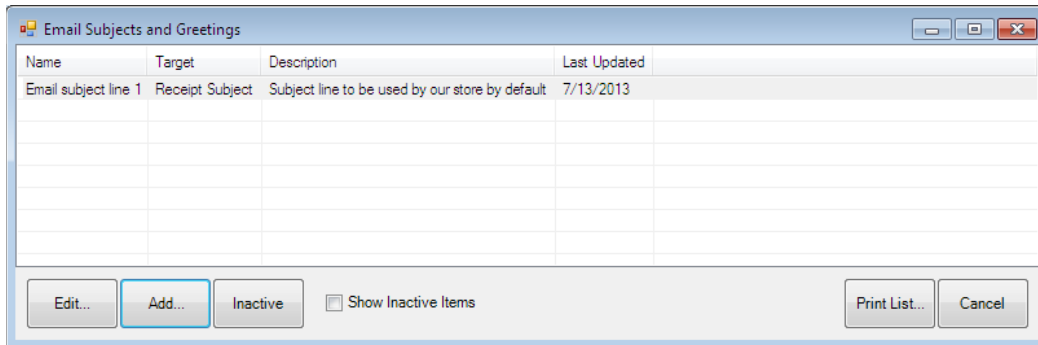2. Select **Add**. The **Edit Email Header** window will appear.

3. Enter a meaningful name in the **Title** field.

4. Enter a description of the header or footer in the **Description** field.

5. Enter the content of the header or footer in the **Input** field.

6. Select **OK/Save and Close**.

7. The new header or footer will appear in the **Email Administration** window.

Email Subjects and Greetings

To define automated subject lines and email content:

1. Select **Administrative=>Notifications=>Email Subjects and Greetings**. The **Email Subjects and Greetings** window will appear.

2. Select **Add**. The **Create new email subject or greeting** window will appear.

3. Enter a meaningful name of the subject or greeting in the **Title** field.

4. Enter a description of the subject or greeting in the **Description** field.

5. Enter the text for the subject or greeting in the **Text Input** field.

6. Select whether this is a subject or greeting.

7. Be sure to select what kind of notification with which this is to be associated from the **Notification Type** drop-down menu.

8. Use the **Insert** option to enter variable information such as your store name, the date, the sale number, or the customer's name.

9. Notice the system default is provided; this is what will be used if you don't define any messages.

10. Select **OK/Save and Close**. The subject or greeting will now be available in the **Email Administration** window.

SMS Administration

To choose what messages to associate with types of notifications:

1. Select **Administrative=>Notifications=>SMS Administration**. The **SMS Administration** window will appear.

2. For each of **Repair Done**, **Custom Job Done**, **Appraisal Done**, and **Special Order Done**, select whether to use the system default message, or a pre-defined message.

To define messages, see the section below.

SMS Messages

To define SMS messages for use in the **SMS Administration** window:

1. Select **Administrative=>Notifications=>SMS Messages**. The **SMS Administration** window will appear.

2. Enter a meaningful name of the message in the **Title** field.

3. Enter a description of the message in the **Description** field.

4. Enter the text for the message in the **Text Input** field.

5. Be sure to select what kind of notification with which this is to be associated from the **Notification Type** drop-down menu.

6. Use the **Insert** option to enter variable information such as your store name, the date, the envelope number, the number of jobs done, the number of repair jobs done, the number of jobs not done, etc.

7. Notice the system default is provided; this is what will be used if you don't define any messages.

8. Select **OK/Save and Close**. The subject or greeting will now be available in the **Email Administration** window.