Edge/Clientbook Integration

Status

Originally planned as a limited integration to develop an app to push Edge data to the Clientbook platform, the scope of the integration increased significantly during development and a full partnership between our companies was agreed upon to deliver a better product with the groundwork laid to more tightly link the two systems in the future.

Development work has been completed internally and it is currently in beta testing with select stores. It will be available to all Edge users on the conclusion of the beta period.

Overview

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 Clientbook integration uses ECon to keep data synchronized between our two systems, facilitating the transfer of information in both directions. See the following sections for specifics on what synchronizes and how the integration functions.

What data is synchronized?

Customers

In Edge, you have the choice to either synchronize all customers OR select the customers you want to synchronize. If selecting customers, you have the option to do them one at a time or you can select multiple at once from any customer list view.

In Clientbook, 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 Clientbook in this manner are automatically set to synchronize.

Customers that are set to synchronize will transmit some data unidirectionally (one way flow) and some data bidirectionally (changes go back and forth).

Customer information that synchronizes includes:

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

- Edge Customer Contact Methods upload to Clientbook.
- Contact Method changes made in Edge will overwrite (update) the Clientbook customer data.

- Contact Method changes made in Clientbook will import as new Edge contact methods rather than updating/erasing existing.
    - For example, if you change a customer email address on Clientbook, 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.

Edge Customer Custom Fields = Clientbook Customer Preferences [bidirectional]

- Edge Customer Custom fields are found on the Other Keys tab of the Edge Customer Record and can be customized via System Options.
- Edge Customer Custom fields can be mapped to Clientbook Customer Preferences.
- Changes made in Edge upload to Clientbook and vice-versa.
    - Acquisition (the first why-in) is the exception. It will upload from Edge to Clientbook, and will download from Clientbook for new customers, but changes made in Clientbook will not overwrite your original Acquisition in Edge.

Edge Wish Lists = Clientbook Collections [bidirectional]

- Edge Wish Lists upload to a Clientbook Collection named Edge.
    - Supports both stock and non-stock wishes.
- Changes made to Edge wish lists upload to Clientbook and vice-versa.
    - Only changes to the Collection named Edge on the Clientbook customer synchronize. Other Collections are ignored.
- Edge wish list items will also appear as Clientbook Products.

Edge Notes = Clientbook Recent Activity [bidirectional]

- Edge Customer Notes upload to Clientbook Recent Activity.
- Clientbook Recent Activity downloads as Edge Notes.
- Changes made to existing notes in Edge upload to Clientbook and vice-versa.

Edge Sales History = Clientbook Client Purchases [unidirectional]

- Edge Sales History uploads to Clientbook Client Purchases.
- Sold Edge items are uploaded as archived Clientbook Products.
- Edge Service Jobs will also have ‘dummy’ archived Product records created with the details of the job.

Clientbook Messages (Emails/Texts) [unidirectional]

- Messages (emails or texts) sent through Clientbook download to Edge and appear on the Edge Customer's Activity tab.
- This is not related or linked to Edge notifications, though you do have the option to use Clientbook as your Edge SMS provider. Edge notification data will not appear in Clientbook.

Products

Edge items, wish lists, and service jobs are uploaded to Clientbook as Products.

On Hand Inventory

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

Sold Inventory

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

Wish Lists

- If synchronizing Customer wish lists (Clientbook Collections), each uploaded wish list item will have a matching Clientbook Product record.

Service Jobs

- If you upload an Edge Customer's Sales History, each service job (repair / custom / appraisal) record will have a matching Clientbook Archived Product record.

Associates

Edge associates do not upload and must be manually added to Clientbook and mapped to an Edge Associate number.

- Each Clientbook Associate record has a **Point of Sale ID** field where you map the Clientbook Associate to the Edge Associate by manually entering that associate's corresponding Edge Associate number.
    - When importing changes from Clientbook to Edge, this is used to record who made the change.
    - In ECon setup, there is a field to specify a default Edge Associate to use in the event a Clientbook Associate makes a change and does not have a Point of Sale ID on file.
- The Edge Customer's Assigned Associate field does not currently map to Clientbook and is ignored.

How does it work?

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

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 Clientbook every 15 minutes.

Notifications

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

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