

Edge/Clientbook Integration

Overview

The **Edge/Clientbook** integration utilizes the **Edge Connector (ECon)** app to synchronize your Edge data with Clientbook. This includes:

- **Customers**
 - ✓ **Contact Methods (address / email / phone)**
 - ✓ **Purchase History**
 - ✓ **Wish Lists**
 - ✓ **Notes**
 - ✓ **Text Messages**
- **Items**
 - ✓ **Descriptions**
 - ✓ **Images**

Additionally, the integration allows you to use Clientbook to power the Edge's internal text notification system. This can be used to automatically text customers when special orders are in, repairs are ready, and much more.

What data is synchronized?

Not all data is sent both ways. Some data points are unidirectional while others are bidirectional.

Unidirectional

Data is sent one way, either from Edge to Clientbook or from Clientbook to Edge.

Bidirectional

Data is sent both ways meaning changes made on one platform will be reflected on the other.

Customers

All customers are synchronized. Any customer added to Edge will be uploaded to Clientbook and any customer added in Clientbook will be downloaded back into Edge.

Customer information that is sent includes:

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

- 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 to prevent data loss.

Edge Customer Custom Fields = Clientbook Client 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 Wish Lists = Clientbook Collections [bidirectional]

- Edge wish lists link to a Clientbook collection named Edge on each customer.

Edge Notes = Clientbook Recent Activity [bidirectional]

- Edge Customer Notes upload to Clientbook Recent Activity 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 notifications will appear in Clientbook.

Products

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

On Hand Inventory [unidirectional]

- On hand Edge inventory is uploaded as Clientbook Products.

Sold Inventory [unidirectional]

- If you upload an Edge Customer's Sales History, any related sold items are uploaded to Clientbook Archived Products.

Service Jobs [unidirectional]

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

Associates

Associates do not automatically synchronize. All Edge associates must be manually entered in Clientbook and mapped by entering their Edge Associate ID.

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, products, sales, notes, and wish lists, this may take several hours to complete.

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