

Store Calendar

Introduction

The Edge provides an interactive **Store Calendar** that allows you to see and act on:

Customer Occasions

Create mailing lists, directly email, or simply view customers with upcoming birthdays and anniversaries.

Service Jobs

View jobs (repairs, custom orders, special orders, appraisals, assemblies, and builds) and job tasks that are due, overdue for completion, and overdue for pickup.

Customer Appointments

Schedule and manage your appointments.

Associate Tasks

View and manage tasks for all or specific associates.

The screenshot shows the Store Calendar interface for October 2019. The calendar view is set to 'Day' mode, showing the 3rd of October (Thursday). The interface includes a sidebar with a checklist of event types and a dropdown menu for 'All Associates'. The main calendar area displays various events categorized by time slots and color-coded by type. Callout boxes A, B, and C highlight specific features: A points to the sidebar filters, B points to a customer occasion tile, and C points to a customer appointment tile.

A

These checkboxes toggle which occasions, services, and tasks to display. The drop-down allows you to filter these records by associate. You can select a specific associate, see all associates, or only see records not assigned to any associate.

B


Customer occasions, service jobs, and tasks will always display at the top starting in the 5AM timeslot. The number in parenthesis indicates how many underlying records are present. Double click on a tile to view matching records and possible actions.

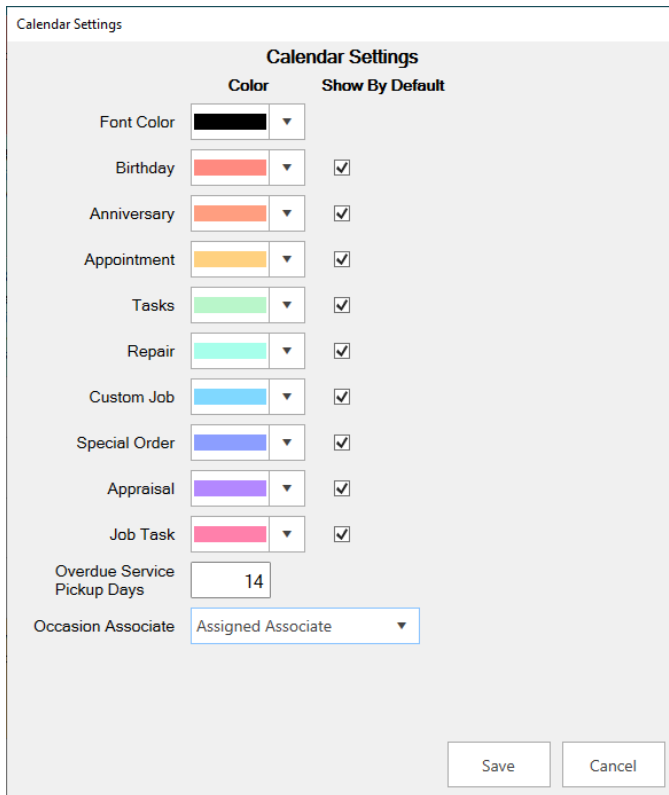
C

Customer appointments will display at their respective times. Double click an existing appointment to edit it. Double click an open timeslot to create a new appointment.

Settings

To access **Calendar Settings**:

1. Click the **Calendar** button in the top menu. The **Store Calendar** will appear.
2. In the top right, click the  (**Settings**) button. The **Calendar Settings** window will appear.



	Color	Show By Default
Font Color		
Birthday		<input checked="" type="checkbox"/>
Anniversary		<input checked="" type="checkbox"/>
Appointment		<input checked="" type="checkbox"/>
Tasks		<input checked="" type="checkbox"/>
Repair		<input checked="" type="checkbox"/>
Custom Job		<input checked="" type="checkbox"/>
Special Order		<input checked="" type="checkbox"/>
Appraisal		<input checked="" type="checkbox"/>
Job Task		<input checked="" type="checkbox"/>
Overdue Service Pickup Days	14	
Occasion Associate	Assigned Associate	

3. Use the **Color** drop-down to change the color used for each element of the calendar.
4. Use the **Show By Default** checkbox to determine which occasions and services appear on the calendar by default. These can always be changed on the fly from the main calendar view, too.
5. **Service Done Days** defines the number of days a service job must be overdue before it starts appearing on the calendar, e.g. enter '14' if you want jobs to show up as overdue once they have been completed but not picked up for 14 days.
6. **Occasions Associate** allows you to determine which associate is assigned to each customer. There are three choices:

Assigned Associate

Associate manually assigned on the customer record's **Other Keys** tab.

Last Transaction Associate

Associate that last processed any type of transaction for this customer.

Last Merchandise Associate

Associate that last processed a merchandise sale or service intake.

7. Make any desired changes, then click **Save**.

Using the Calendar

Overview

Refresh calendar

Show/Hide month and checkboxes

Toggle view mode to day, week, or month

Open settings

Pop calendar out to separate window

Change month

Move forward and back between day, week, or month (depends on view mode)

Click on a date to switch to it

Choose what to display

Filter calendar by associate

Double click any tile to open actionable items

Double click to edit appointment

Double click empty timeslot to add new appointment

Occasions

Double click an **Occasions** tile to open a list of matching customers.

Opens editor allowing you to email selected customers

Opens selected customers in a list view

Open customer record

Individually select or use Check All/None buttons

Add selected customers to a new or existing mailing list

Cust Id	Customer Name	email	Phone
<input checked="" type="checkbox"/>	001-00212		
<input checked="" type="checkbox"/>	001-00781		
<input checked="" type="checkbox"/>	001-01288		
<input checked="" type="checkbox"/>	001-01427	Glen, Pat (001-01427)	
<input checked="" type="checkbox"/>	001-01675	Fields, Thomas (001-01675)	t.fields@msn.c
<input checked="" type="checkbox"/>	001-02086	Nunnelly, Rob (001-02086)	rob.nunnelly.6c
<input checked="" type="checkbox"/>	001-02222	Evangeline, Linda (001-02222)	lindae@msn.cc
<input checked="" type="checkbox"/>	001-02556	Anmoore, Rodney (001-02556)	
<input checked="" type="checkbox"/>	001-02606	Barnardville, Carma (001-02606)	carma.barnard:

Store Tasks

Double click the **Store Tasks** tile to open a list of associate tasks that are due today or overdue.

(20) Store Tasks
Store Tasks that are overdue or need to be done today.

Store Tasks that are OverDue or need to be Done Today.

View Task Complete Task Mark selected task completed

Due Date	Associate	Status	Category	Priority
9/16/2019	Anyone	Not Started	Inventory	Medium
9/16/2019	Anyone	Not Started	Inventory	Medium
9/16/2019	Anyone	Not Started	Inventory	Medium
9/16/2019	Anyone	Not Started	Inventory	Medium
9/14/2019	Anyone	Not Started	Inventory	Medium
9/12/2019	Anyone	Not Started	Customer	Medium
9/18/2019	Anyone	Not Started	Inventory	Medium

Open selected task record

Job Tasks

Double click the **Job Tasks** tile to open a list of job tasks that are due today or overdue. Job tasks include repairs, custom orders, builds, and assemblies.

(5) Job Tasks
Job Tasks that need to be completed.

Job Tasks that need to be completed.

Job List See Job

Type	ID	Location	ETA
<input checked="" type="checkbox"/> Custom Job	001-131180-001-001		
<input checked="" type="checkbox"/> Custom Job	001-131180-002-001		
<input checked="" type="checkbox"/> Repair	001-131185-001-001		1/29/2019
<input checked="" type="checkbox"/> Repair	001-131185-002-001		1/29/2019
<input checked="" type="checkbox"/> Repair	001-131185-003-001		1/29/2019
<input checked="" type="checkbox"/> Repair	001-131188-001-001		1/29/2019
<input checked="" type="checkbox"/> Repair	001-131189-001-001		1/29/2019
<input checked="" type="checkbox"/> Repair	001-131194-001-001		1/15/2019
<input checked="" type="checkbox"/> Repair	001-131204-001-001		1/23/2019

Opens jobs records for selected tasks in a list view

Open job record for selected task

Individually select or use Check All/None buttons

Check All Check None Close

Services Due

Each service type (repair, custom job, special order, and appraisal) will have a **Due** tile, e.g. Repair Jobs Due, Custom Jobs Due, etc. Double click this tile to open a list of service jobs that have an ETA of today and are not completed.

The 'Services Due' interface consists of four colored tiles on the left and a detailed view on the right. The tiles are:

- (1) Repairs Jobs Due** (Light Green): Repair Jobs that have an ETA that is today.
- (1) Custom Jobs Due** (Light Blue): Custom Jobs that have an ETA that is today.
- (1) Special Orders Due** (Light Purple): Special Orders that have an ETA that is today.
- (1) Appraisal Jobs Due** (Dark Purple): Appraisal Jobs that have an ETA that is today.

The detailed view for 'Repair Jobs Due' shows a table of jobs with the following columns: ID, Customer Name, ETA, and Status. Callouts indicate the following features:

- Service List**: A button to open selected job records in a list view.
- Open job record**: A button to open a specific job record.
- Open customer record**: A button to open a customer record.
- Check All/None buttons**: Buttons to individually select or use 'Check All/None' buttons.

ID	Customer Name	ETA	Status
001-131350-001	Caratunk, Jane (001-09716)	9/27/2019	
001-131301-001	East, Brent (001-1014965)	9/27/2019	
001-131300-008	Solvang, Diane (001-14965)	9/27/2019	Open
001-131300-007	Solvang, Diane (001-14965)	9/27/2019	Open
001-131300-006	Solvang, Diane (001-14965)	9/27/2019	Open

Services Overdue

Each service type (repair, custom job, special order, and appraisal) will have an **Overdue** tile, e.g. Overdue Repair Jobs, Overdue Custom Jobs, etc. Double click this tile to open a list of service jobs that have a past due ETA, but are not completed.

The 'Services Overdue' interface consists of four colored tiles on the left and a detailed view on the right. The tiles are:

- (118) Overdue Repair Jobs** (Light Green): Repair Jobs that have an ETA that is past due.
- (2) Overdue Custom Jobs** (Light Blue): Custom Jobs that have an ETA that is past due.
- (26) Overdue Special Orders** (Light Purple): Special Orders that have an ETA that is past due.
- (1) Overdue Appraisal Jobs** (Dark Purple): Appraisal Jobs that have an ETA that is past due.

The detailed view for 'Overdue Repair Jobs' shows a table of jobs with the following columns: ID, Customer Name, ETA, and Status. Callouts indicate the following features:

- Service List**: A button to open selected job records in a list view.
- Open job record**: A button to open a specific job record.
- Open customer record**: A button to open a customer record.
- Check All/None buttons**: Buttons to individually select or use 'Check All/None' buttons.

ID	Customer Name	ETA	Status
001-131230-001	Sedgewickville, Jane (001-00274)	1/14/2019	
001-131313-001	Little, Kevin (001-00306)	2/4/2019	
001-131000-001	Whitefish, Karen (001-00403)	2/17/2019	Open
001-131201-001	Choteau, Bill (001-00457)	1/23/2019	Open
001-131049-001	Brewer, Robert (001-00629)	1/25/2019	Open
001-131168-001	Wathena, Linda (001-00703)	1/30/2019	Open
001-130832-001	Cambria, John (001-00720)	1/29/2019	Open
001-112576-001	Lincoln, Barb (001-00878)	4/27/2017	Open
001-128892-001	Kathryn, Ann (001-01041)	12/4/2018	Open

Services Overdue Pick Up

Each service type (repair, custom job, special order, and appraisal) will have an **Overdue Pick Up** tile, e.g. Overdue Repair Pick Ups, Overdue Custom Pick Ups, etc. Double click this tile to open a list of service jobs that are overdue for pick up.

The screenshot shows a list of overdue repair jobs. On the left, there are four colored tiles representing different service types: (58) Overdue Repair Pick Ups (green), (1) Overdue Custom Job Pick Ups (blue), (9) Overdue Special Order Pick Ups (purple), and (1) Overdue Appraisal Pick Ups (pink). The main window displays a table of repair jobs with columns for ID, Customer Name, and Phone #. Callouts point to various features: 'Opens selected job records in a list view' points to the 'Service List' button; 'Opens Notification List for selected jobs allowing you to track and resend notifications' points to the 'Notify List' button; 'Opens editor allowing you to email customers for selected jobs' points to the 'Email Customers' button; 'Individually select or use Check All/None buttons' points to the checkboxes and 'Check All'/'Check None' buttons at the bottom of the table; 'Open job record' points to the 'See Service' button; and 'Open customer record' points to the 'See Customer' button.

ID	Customer Name	Phone #
<input checked="" type="checkbox"/>	001-130973-001 Perks, Mary (001-00854)	5053243631
<input checked="" type="checkbox"/>	001-128970-002 Bement, Stacey (001-01064)	
<input checked="" type="checkbox"/>	001-128970-001 Bement, Stacey (001-01064)	
<input checked="" type="checkbox"/>	001-130819-001 Moore, Mike (001-01304)	5054666211
<input checked="" type="checkbox"/>	001-101766-002 Elm, Robb (001-01568)	elm.r.7709@m: 5055624857
<input checked="" type="checkbox"/>	001-101766-001 Elm, Robb (001-01568)	elm.r.7709@m: 5055624857

Appointments

Each appointment will have its own tile in the corresponding timeslot on the calendar. Double click the tile to open the appointment record.

The screenshot shows a 'Sales Opportunity Appointment' tile on the left, which is a yellow box with a calendar icon and the text: 'Sales Opportunity Appointment Sales Opportunity Appointment with: Gregg Pampa'. To the right is the detailed appointment record for 'Appointment #190925-114113-01-01-3475 Gregg Pampa (001-12980)'. The record is divided into 'Appointment Details' and 'Result History'. The 'Appointment Details' section includes fields for Associate (1, #1: Tom Owner), Customer (Pampa, Gregg (001-12980)), Contact Method (In Person, CUSTOMER.CITY, CT 06483), Appt Type (Sales Opportunity), Details (Wedding band), Priority (Low), Date(s) (Time Range selected), Begin Date (9/27/2019 10:30 AM), Due Date (9/27/2019 11:30 AM), and Creation Date (9/27/2019 10:30:13 AM). The 'Result History' section is currently empty. At the bottom, there are buttons for 'Revert', 'OK / Save & Close', and 'Cancel', along with a 'Classic View' checkbox.