

Wizards

Overview

A wizard is a setup assistant that provides an easy-to-use graphical interface to help guide you through a series of steps to complete a task. There are currently 4 wizards in The Edge with more coming soon:

- Item Pop-Ups
- Customer Appointments
- Customer Pop-Ups
- Vendor Image Import

Item Pop-Ups

The **Item Pop-Ups** wizard allows you to apply a pop-up to multiple items at once.

To use the item pop-up wizard:

1. Click **Inventory ► Items ► Add ► Item Pop-Ups**. The wizard will appear.
2. Click **Next** and it will bring you to the item selection screen.
3. Use the **Item Filter** drop-down to specify criteria, then click the **Search** button. A list of matching items will populate in the lower portion of the window.
4. Check the items you wish to include and click **Next**.
5. Enter the **Title**, date range to display pop-up, and the **Notes**, then click **Create Pop-Ups**. The pop-up will now be added to all the selected items.

Customer Pop-Ups

The Customer Pop-Ups wizard allows you to apply a pop-up to multiple customers at once.

To use the customer pop-up wizard:

1. Click **Customer ► Wizards ► Mass Pop-Ups**. The **Customer Pop-Ups Wizard** will appear.
2. Click **Next**. Use the **Customer Filter** drop-down to enter criteria to find customers and click the **Search** button. A list of matching customers will populate the lower portion of the window.
3. Select the customers you wish to include and click **Next**.
4. Enter a **Title**, choose whether the Pop-Up applies to **Couple** or **Individual**, set your dates, and enter **Notes**.
5. Click **Create Pop-Ups** to add these to the selected customers.

Customer Appointments

This Customer Appointments wizard allows you to set appointments for multiple customers at once.

To use customer appointments wizard:

1. Click **Customer ► Wizards ► Mass Appointments**. The **Mass Appointments Wizard** will appear.
2. Click **Next**. Use the **Customer Filter** drop-down to enter criteria to find customers and the **Contact Method** drop-down to choose contact type, then click the **Search** button. A list of matching customers will populate the lower portion of the window.
3. Select the customers you wish to include and click **Next**.
4. Specify your appointment details.
5. Click **Create Appointments** to add these to the selected customers.

Vendor Image Import

The **Import Images** wizard allows you to mass import images from a vendor. These images are then matched to your inventory based on the style number. Note that this only works if the images are named after the vendor's style number.

To use this wizard:

1. Click **Administrative ► Import Images**. The **Import Images Wizard** will appear.
2. Click **Next**. Use the top drop-down to select the folder containing your vendor images. Use the bottom drop-down to select the folder to save the images (this defaults to your Edge photos folder).
3. Click **Next**.

Vendor

Use this drop-down to select the vendor for these images.

When saving images

Append to Current will add new images and keep any existing.

Overwrite All will remove existing images and add new (images are removed from Edge, but not deleted from your computer).

Make Image Primary

When appending, check this to make the newly imported image the primary.

If the style code starts with the file name then add images

Check this to match images of the beginning of the file name matches the beginning of the vendor style (e.g. file 12345.jpg would match to style 123456-14K-WG).

4. Specify your criteria and click **Next**. The software will compare the images to the items in your database and display the number of matches found.
5. Use the **Import Images** button to import the matching styles. Depending on the number of images this may take a few minutes to complete.