Edge 23.3 Beta

Introduction

Welcome to the Edge 23.3 Beta Test!

Thank you for participating – your feedback is valuable.

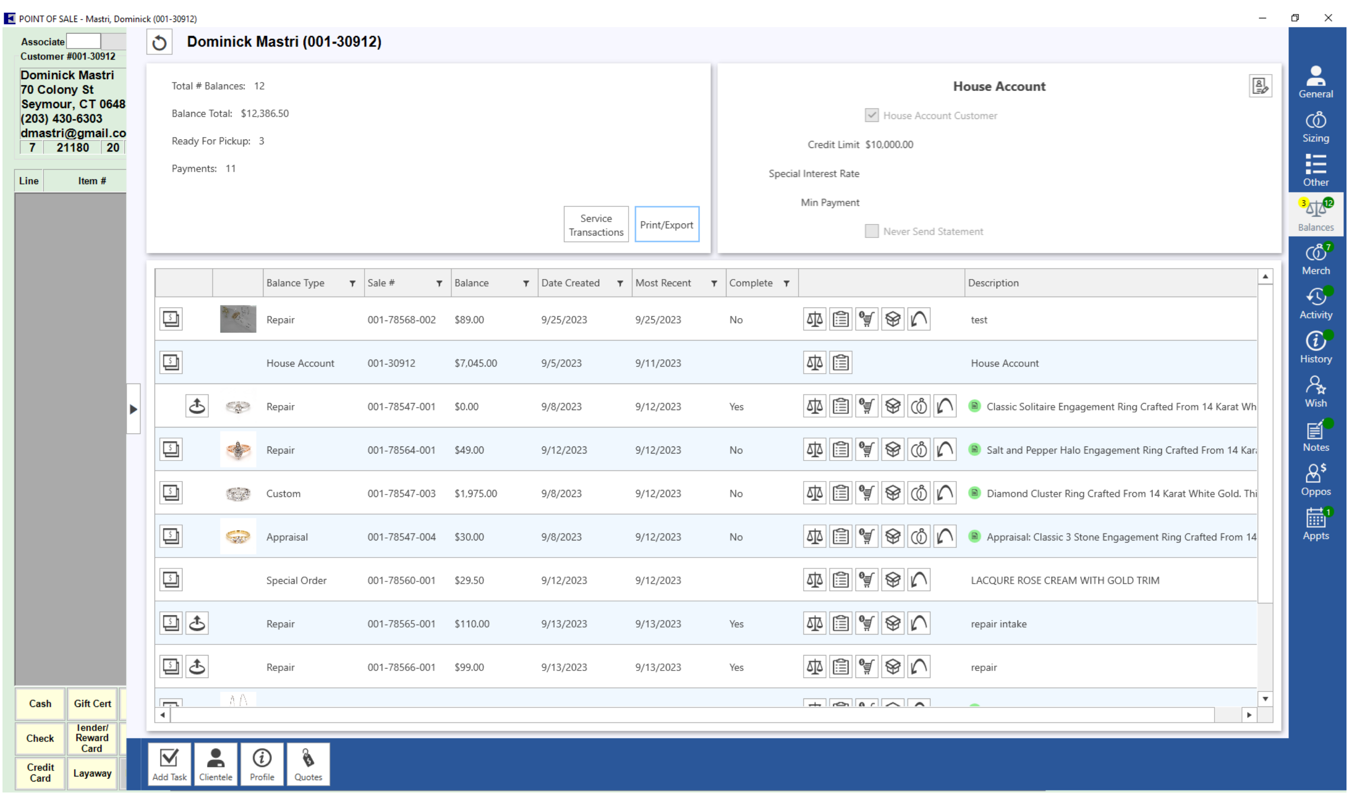
During the duration of this beta, any beta feedback or problems should be sent directly to Beta@ajsllc.com. This is a monitored email and our dedicated beta team will respond with a call or email depending on the situation.

The beta team **can only assist** with beta related issues. Regular issues would still need to go through our regular Support team.

What's new?

POS Customer Overlay

We have added a new, optional, overlay to POS. This is our first step towards redesigning the POS. As we understand POS is a critical aspect of your business, this feature is **optional** and can be enabled/disabled at any time via a **System Option**.



It includes all of the tabs found on the Customer Record in a new format with additional capabilities.

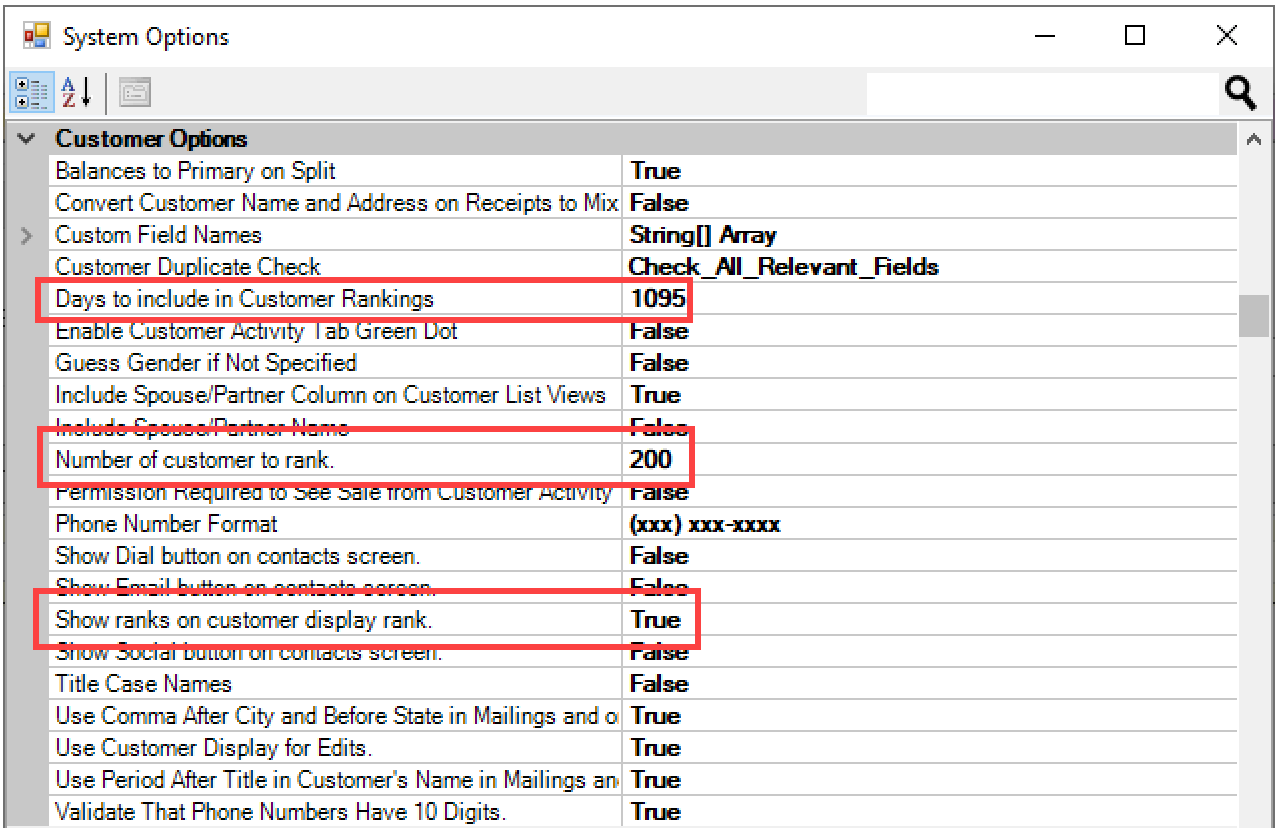
We are purposefully being a bit vague here because part of this test is about usability and we want to see how much of the redesign is intuitive.

To enable this feature:

1. Click **Administrative > System Options**.
2. Scroll down to the **POS Options Scheme** section.
3. Set the option **Show Customer Display** to **True**.
4. Open POS – the new sidebar should appear and will light up when a customer is loaded.

NOTE: This can be disabled at any time.

Additionally, there are three new **System Options** that control the **Rankings** that display on the **General** tab.



GemLightBox Integration

The integration has been revamped to directly connect to GemLightBox's web API. This makes transferring images much easier and also gives you access to using their AI description generator.

Read more here: https://edgeuser.com/Knowledge/Knowledge-Base/beta-beta-features-gemlightbox-by-picup-media-overview-of-gemlightbox

New Customer Contact Method – Social

This can be enabled to add a new contact method type for capturing social media information. Note at this time it is strictly for storing this information and does not yet tie out to anything on their platforms.

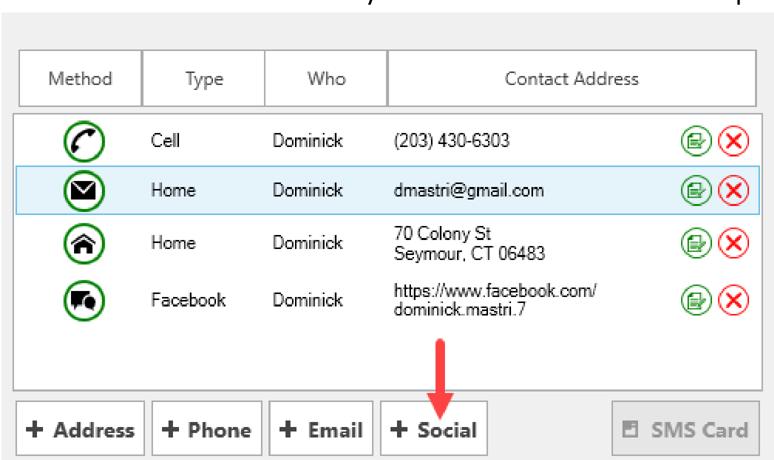
If you want to use this, first you must enable the **System Option**:

Customer Options	
Balances to Primary on Split	True
Convert Customer Name and Address on Receipts to Mix	False
Custom Field Names	String[] Array
Customer Duplicate Check	Check_All_Relevant_Fields
Days to include in Customer Rankings	1095
Enable Customer Activity Tab Green Dot	False
Guess Gender if Not Specified	False
Include Spouse/Partner Column on Customer List Views	True
Include Spouse/Partner Name	False
Number of customer to rank.	200
Permission Required to See Sale from Customer Activity	False
Phone Number Format	(xxx) xxx-xxxx
Show Dial button on contacts screen.	False
Show Email button on contacts screen.	False
Show ranks on customer display rank.	True
Show Social button on contacts screen.	False
Title Case Names	False
Use Comma After City and Before State in Mailings and o	True
Use Customer Display for Edits.	True

Next, set up the types of social media (Instagram, Facebook, etc) that you will be collecting:

1. Click **Administrative > Advanced Settings > Social Contact Methods.**
2. **Add** the methods you will be collecting.

Now on the **Customer Record** you will see a new button to capture this information.



Customer History

A new **Customer History** tab has been added that separates out some of the data that was displaying under **Customer Activity**, such as notifications.

Special Order History

A new tab has been added to Special Order records displaying their history.

Dashboard – Honor Wish Splits
Dashboard tiles now honor wish list commission splits and follow the way you have them configured in System Options.

Service Photos – Option to Save to Subfolders
A new option was added under **General Options** called 'Service Images Save to Service Folders'; if enabled, any service job photos will be saved under subfolders instead of being saved to your main Photos folder.

Receipts – Repair Task Formatting
Repair task descriptions have been improved to look cleaner on the receipt.

PO Print – Contacts Labeled
Purchase Order phone, contact, account number are all now labeled.

Report Grouping Options – Folio and PO
Inventory reports can feature two new grouping options: by folio # and by PO #.

Report Options – Serial Numbers
Serial numbers can now be included on inventory reports.

Joined Items – Can Now Include Builds
You can now include built items in a joined item.

Notification Option – Do not Notify Until All Jobs Complete
A new option was added under **Notification Options** called 'Multiple Services Notifications Options'**;** this controls what happens when there are multiple jobs of different types that are set to notify.

Item Move – Vendor Barcodes
Support was added to move an item's location using a vendor barcode.

Physical Inventory Scan – Larger Photo
The photo displayed at the top of this form is now larger.

Rapid Reorder Report – Page Breaks
This report can now include page breaks.

Associate Task Report – Clickable Links
You can now click on the tasks on this report to open the associated task record.

Commission Report – New Options
There are new options on this report so that you can hide commission percentages as well as include cost.

Item Record – Copy From
The Copy From button has been restored.

Service Jobs – ETA Estimated by Default Option
A new option was added under **General Options** called 'Make All ETAs Estimated by Default'; if enabled, the **Estimated** checkbox will automatically be checked on all job intakes.

EDT/ECon – Exclude Items with No Web Titles
There is a new option in EDT/ECon that can be enabled if you want to automatically exclude any item that does not have a web title from being uploaded.