

Automated Notifications

Overview

You can create rules so that text and email **Notifications** are automatically sent out when the conditions of the rules are met. This feature works with the following areas of the software:

Appointments

Send reminders to customers for upcoming appointments.

Customer Occasions

Send messages to customers based on birthday and anniversary dates. For example, you could create a rule to automatically email out a 'Happy Birthday' message

Opportunities

Send notifications to associates or customers when their opportunity meets criteria, such as becoming stale or being closed.

Sales

Send texts or emails to customers based on sales criteria. For example, you could create a rule to automatically send a 'Thank you' message on new purchases.

Services - Repairs / Custom Jobs / Special Orders / Appraisals

Send notifications before the job is picked up or after. For example, you might create an overdue repair reminder that goes out 7 days after it has not been picked up. Or a rule to email a customer 2 years after an appraisal is picked up reminding them to come in to get it updated.

Requirements

Reports – Timed Automation

- You must have this feature enabled and setup.
- See the [Reports – Timed Automation](#) documentation for more information.

Notification Templates

- You should create custom email and SMS templates for each type of notification rule you create. This process is covered here briefly.
- See the [Notification Templates](#) documentation for more information.

Email/SMS Setup

- For emails, you must complete the Notification section of Edge Email setup.
- For SMS, you must be licensed through our Administrative department for either Plivo, Podium, or Clientbook messaging.

Additional Settings

- For service jobs, the **Notify** field must be filled in on the job record.

- For occasions, the **Birthday** or **Anniversary** date must be filled in on the customer record and a preferred email and/or cell must be on file.

Working with Automated Notifications

Creating Templates

It is recommended you create a custom **Notification Template** that corresponds to the rule you wish to create. For example, if you are creating a repair overdue pickup reminder, you might make a template with this text:

Editing Template

Name* Repair Overdue Pickup Copy From

Type* Repair (Customer)

Body*
 Hello {{Customer.FirstName}},
 This is a friendly reminder that your repair is ready and waiting for you.
 Repair #: {{Repair.EnvelopeNumber}}
 Description: {{Repair.Description}}
 Ready for Pickup: {{Repair.DoneDate}}
 Amount Due: {{Repair.AmountDue}}
 Please call us if you have any questions: {{Store.PhoneNumber}}
 thanks,
 {{Store.Name}}

Field List:
 Customer: FirstName, LastName, Title
 Repair: EnvelopeNumber, DoneDate, Description, AmountDue
 Store: Name, PhoneNumber, Address, Street1, Street2, State, City, Zip

Buttons: Preview, Load Default Values, Save & Close, Cancel

To create a **Notification Template**:

- Click **Administrative > Notifications > Manage Notification Templates**.
- Click the **Add New Email** or **Add New SMS** button at the bottom.
- Create and save your template. For assistance, see our **Notification Templates** documentation.

Creating Rules

To create an **Automated Notification** rule:

- Click **Administrative > Automation Rules > Automation Rules**. The **Automation Task Rules** window will open.
- Click **Add Timed Rule** at the bottom.

Rule Type	Rule Trigger	Is Active	Store	Rule Name
Customer Task	Customer Created	Yes	All	New Customer - Thank You
Repair / Custom Task	Repair Picked Up	Yes	All	Repair Followup Call
Sold Task	Inventory Sale	Yes	All	New Sale - Thank You
Sold Task	Inventory Sale	Yes	All	Engagement Ring Sold
Timed Report Email	Automation on a Timer	Yes	All	Weekly Activity Report
Timed Report Email	Automation on a Timer	Yes	All	End of Month

Buttons: Add Trigger Rule, Add Timed Rule, Edit Rule, Delete Rule, Show Deleted, Print/Export, Close

3. Enter a **Name**, then click **Next**. In this example, we will create a rule to send a reminder to customers who have had a repair waiting for pickup for 7 days.

Time Automation Wizard

Add a new Automation Rule

Name*

Next > Cancel

4. Choose **Automated Notification**, then click **Next**.

Time Automation Wizard

Template Options

Notification Type:

Email Template:

SMS Template:

Time Options

Time of Day:

Days Before / After: - +

Days after the Repair was finished but not picked up yet.

Filters

Customer Filter:

Store:

< Back Next > Cancel

5. At the top, select **Repair Pre Pickup**.
6. Select an **Email** or **SMS Template**. You can specify both if you like.
7. Choose the **Time of Day** you wish the notification to go out, then set the **Days Before / After** field to **7 days after**.

8. In this example, the rule is setup to automatically send a notification to the customer if their repair has been ready for 7 days and not picked up.

9. Click **Next** then **Finish**.



NOTE

This notification will be sent once for any repair not picked up 7 days after being finished. If you wanted to have multiple reminders, you would need to create additional rules, i.e., 14 day reminder, 21 day reminder, etc.

Editing Rules

To edit an existing rule:

1. Click **Administrative > Automation Rules > Automation Rules**.
2. Use the **Edit Rule** button or double click the rule you wish to open.
3. Use the **Next** button to step through the wizard and make your desired changes.
4. Click **Finish** at the end to save your changes.

Deleting/Undeleting Rules

To delete an existing rule:

1. Click **Administrative > Automation Rules > Automation Rules**.
2. Select the rule you wish to delete.
3. Click the **Delete Rule** button at the bottom.

To undelete a rule you deleted:

1. Click **Administrative > Automation Rules > Automation Rules**.

2. Check the **Show Deleted** box at the bottom.
3. Deleted rules will appear in red font. Select the deleted rule you wish to undelete and use **Edit Rule** to open it.
4. Click the **Next** button through the wizard making any desired changes along the way.
5. Click **Finish** at the end to complete undeleting this rule.

Example Notification Rules

Appraisal Update Reminder

An email that gets sent 2 years after an appraisal is completed reminding the customer to come back in to get it updated.

Time Automation Wizard

Template Options

Notification Type:

Email Template:

SMS Template:

Time Options

Time of Day:

Days Before / After:
Days after the Appraisal was picked up.

Filters

Appraisal Filter:

Store:

Pearl Restringing Reminder

An email reminder that goes out 1 year after the job is picked up for any repair that included a pearl restringing task SKU.

Time Automation Wizard

Template Options

Notification Type:

Email Template:

SMS Template:

Time Options

Time of Day:

Days Before / After:
Days after the Repair was picked up.

Filters

Repair Filter:

Store:

Repair Sizing Check

A text message that goes out 1 week after a job is picked up for any repair that included a sizing task SKU to ask if the new size still fits properly.

Time Automation Wizard

Template Options

Notification Type: Repair Post Pickup ▼

Email Template: ▼

SMS Template: Repair - Sizing Check ▼

Time Options

Time of Day: 11:00 AM ⌵

Days Before / After: 7 days after - +

Days after the Repair was picked up.

Filters

Repair Filter: R;1000, 1001, 1002, 1003, 1...:Only Picked Up Jobs X ▼

Store: Store #1 ▼

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Next >
Cancel

Repair 1 Week Checkup

An email and text that goes out 1 week after a repair is picked up to make sure the client is satisfied with the work.

Time Automation Wizard

Template Options

Notification Type: Repair Post Pickup ▼

Email Template: Repair - 1 Week Checkup ▼

SMS Template: Repair - 1 Week Checkup ▼

Time Options

Time of Day: 11:00 AM ⌵

Days Before / After: 7 days after - +

Days after the Repair was picked up.

Filters

Repair Filter: ▼

Store: Store #1 ▼

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Next >
Cancel

New Purchase Thank You

A text or email that goes out the day after a customer purchases to thank them for their purchase.

Time Automation Wizard

Template Options

Sales Type:

Email Template:

SMS Template:

Time Options

Time of Day:

Days Before / After: - +

Filters

Sale Filter: X

Store:

Stale Opportunity Reminder

A text or email that goes to an associate when one of their opportunities becomes stale.

Time Automation Wizard

Template Options

Opportunity Type:

Email Template:

SMS Template:

Time Options

Time of Day:

Days Before / After: - +

Filters

Opportunity Filter:

Store: