Notes Framework - Expanded

Overview

Pop-ups are notices that appear on record using the **Notes** tab and at POS (point of sale) to **remind associates** of important notes. Previously only available as Customer Notes, the framework has been expanded to include additional features found throughout the Edge to manage your alerts when working more completely with services, vendors, inventory items, and categories.

Adding Notes in Edge

The steps for adding notes to the newly expanded areas remain the same as when it was introduced originally with **Customer Notes**. The only **exception** is for **Vendors** which has been updated to include a **second note type** to give you more control on where your notes will appear.

For more detailed instructions on adding notes, please see the <u>Customer Notes Revamp</u> section on the EdgeUser website for documentation and tutorial videos.



NOTE: To make a pop-up note appear in POS, you must check the box labeled **Emphasize/Pop-Up** and select the start and end dates using the **Pop-Up Dates** fields.

Adding Notes - Categories, Inventory Items, Job Intake

To add new notes:

- 1. Navigate to the desired location:
 - a. Inventory > Categories > select either List or Add.
 - b. Inventory > Items > then choose Find, Add, Assemble, or Build.
 - c. Open **POS** > enter **Associate** and **Customer** > then choose the appropriate **Intake** button.
- 2. Click the Notes tab.
- 3. Click **Add** at the bottom of the window.
- 4. Fill out the form as desired and click Save/Close to save your note.

Adding Notes – Vendors

To add new **Vendors** notes:

- 1. Navigate to Inventory > Vendors > Find or Add.
- 2. Click the **Notes** tab.

3. At the bottom of the **Notes** window, you will see **two** add buttons: **Add Vendor Note** and **Add Vendor Item Note**.



- a. Add Vendor Note: Notes will ONLY appear on the Vendor record itself. Creating a pop-up note using this option means the note will only pop-up when accessing this vendor record.
- b. Add Vendor Item Note: Notes will appear on BOTH the Vendor record and the Item record. Creating a pop-up note using this option means the note will pop-up in POS as well as the item record.
- 4. Click the **Add** option that best matches how and where you'd like your notes to appear.
- 5. Fill out the form as desired and click **Save/Close** to save your note.

Accessing Notes in Edge

Notes can be accessed using the Notes tab from the following places:

> Categories

EDCE	08	Customer	Clientele	Inventory	Services	Reports	Dashboards	Associate	Calendar	News
				_	_					
Items	General Pricin	g Details Taga	Taxea Descrip	tion Template Note	•					
Categories								Searci	b	Q
List		Note Add	ed: 1/31/202	3 11:38:43 A	и				1/31/2023 11	:39 AM
Add		this is a not	e for Pearls							
Vendors										
EPO										
Print Tags										
Print Signage										
Notal Prices										
Physical Inv.										
Fog RFID Items										
Stones										
Buying Tools										
Inter-Store										
EUtilities										
	Add	Edit	Show	Inactive						Export/Print

Customer Record (Pre-existing feature)

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near Raing Other Keys Balances III Web Late Herplandee III Active III Raine Aquinterents teer Dy Category	Search		c
Note Added: 8/22/2022 2:01:49 PM Remember to welcome as Mr. Simon. Customer does not like to be called by his first name.	8/22/	2022 3:18 8	PM 10
remember to weathing as too, amount clustering solar has not the to be carried by the true hame.	Cus	tomer Serv	ice
Schulzy remander Mr. Binor's who has a lattiday in September. Call contorner to set up apportment to go over git suggestions. Bee image to nearly auchies, suggest matching tractails.	6/22/2022 3:23 PM	30	
	Occasions		
Nishes for Wile Sustainer crosted a wah list with ideas for his wite	8/22/2022 3-24 PM	10	
	Wish Notes		
Cell sustainer to Maker and reporting of the set of the	8/22/2022 3 28 PM	Priority N	olo
	Repar Notes		
Tavorifie colors & Simon's wire prefers white gold and blue geneticmes.	8/22/2022 3:31 PM	10	
	Customer Service		
Edit Add Show Inactive			Export/Pr

> Inventory items

EDCE	POS	Customer	Clientele	Inventory	Services	Reports	Dashboards	Associate	Calendar	News
EDGE										
Items	General 🔵	Stones Tag	Quantities Notes	Disassembled Pre-	Appraise 😑 Histo	ry Website				
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+Add	Note Ad		hob ob		,	Add New Note /	Pop-Up			
Assemble	here is a	Title Prom	otion						-	
Join		Alexa .							Ō	
+Build		30%	discount Valenti	ne's day promo						
Collections										
Levels										
Move										
Categories										
Vendors	-									
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etal Prices										
Physical Inv.		Notify Not P	eal Manager		•	🖌 Email	Text			
ag RFID Items		🖌 Er	nphasize / Pop-l	Jp						
Stones		Pop-L	p Dates 1/31/	2023 🛱 T	2/14/2023	C				
Buying Tools										
Inter-Store										
Utilities	Add									
	<< <								Save / O	

Special Order/Repair/Custom Job Intake

w Special Order	
History	Search
Note Added: 1/31/2023 3:49:38 PM Consult with customer	1/31/2023 3:50 PM
Note Added: 1/31/2023 3:46:16 PM This is a note on a special order	1/31/2023 3:49 PM
Add Edit Show Inactive	Export/Pi
Save & Supervisor Add Task	OK/Save & Close Canc

> Vendors

	POS	Customer	Clientele	Inventory	Services	Reports	Dashboards	Associate	Calendar	News
EDGE										
+ Items		ticing Notes								
Categories		Add new note / pop	-up							
Vendors	Venc				Ad	d New Note / Po	ар-Ор			
Find	this is	Title Promotio	n for Vendor sa	les					Ó	
Add		Note Any items	s sold from this	vendor are 30%	5 off through Ja	nuary.				
Return Memo	-									
Load Catalog										
PO										
rint Tags										
rint Signage										
etal Prices										
letal Prices										
Physical Inv.										
Physical Inv. ag RFID Items										
Physical Inv. ag RFID Items Stones		Notify			•	Email	Text			
Physical Inv. ag RFID Items Stones Buying Tools			ssize / Pop-Up		•	Email	Text			
Physical Inv. ag RFID Items Stones Buying Tools Inter-Store	Ad	Empha	ssize / Pop-Up	3 67 10			Text			
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