SMS Business Card

Overview

The **SMS Business Card** feature gives you the ability to text your business card to customers directly from POS or a Customer Record. The information included in your sent Business Cards is customizable, but Edge does come with a default template that will be used automatically if one is not created and set for use by you.

📄 **NOTE**	You must be an SMS subscriber to use this feature. Please contact admin@ajsllc.com for more information.

Notification Templates

Notification Templates can be created for both email and SMS notifications. That means you must provide the software with raw HTML code that will be used to render your business cards when sent. Edge comes with a series of **default templates** that will be used automatically if you choose not to create and set your own customized templates. Templates are created in HTML code and can include data merge fields that pull in data values from the software.

Visit the Notification Templates section on our EdgeUser.com website for tutorial videos and documentation detailing how to create, edit, and customize your templates.

Editing a Default Template

The easiest place to start is customizing our existing default templates. For this example, we will be creating a new default **Store Business Card Default** template that is based upon the built-in template we provide.

To do so:

1. Click **Administrative > Notifications > Manage Notification Templates**, then click the **Add New SMS** button at the bottom.

2. Enter **Store Business Card Default** as the **Name** and select **Business Card** from the **Type** drop-down.

3. Next, click the **Load Default Values** button at the bottom. This will fill in the **Body** with the software's default values.

4. To see how your business card will look rendered, click the **Preview** button at the bottom.
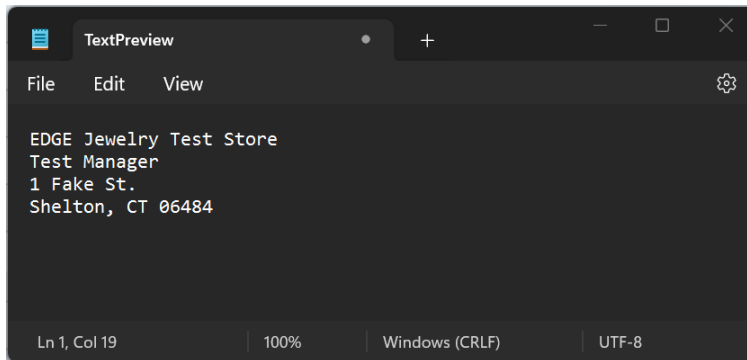
5. Now, let's customize this by adding a greeting and removing the associate merge fields. Close the **Preview** that you opened in the last step and click inside the HTML code in the body.

6. Notice the text now showing in purple; purple text indicates this is a data merge field that is a placeholder for data that will come from saved in associate records or your license. Available fields appear on the right.
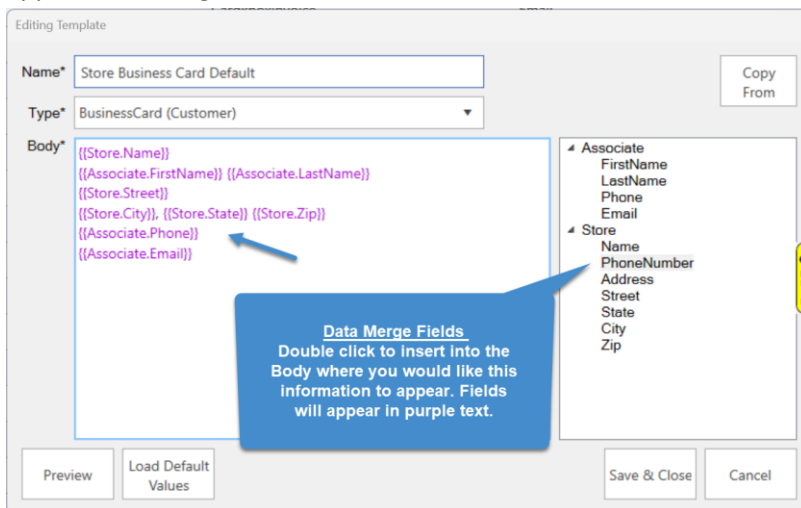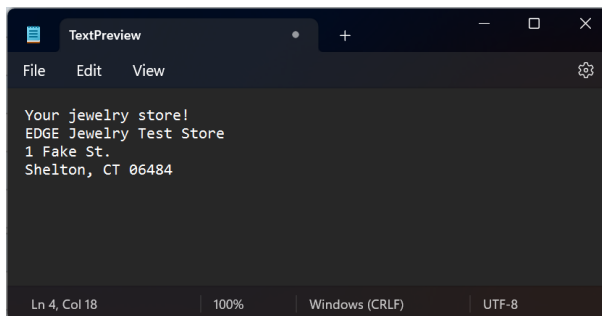

7. Click inside the HTML and erase the whole line for {{Associate.FirstName}} {{Associate.LastName}}, and then at the bottom erase both lines for {{Associate.Phone}} and {{Associate.Email}}.
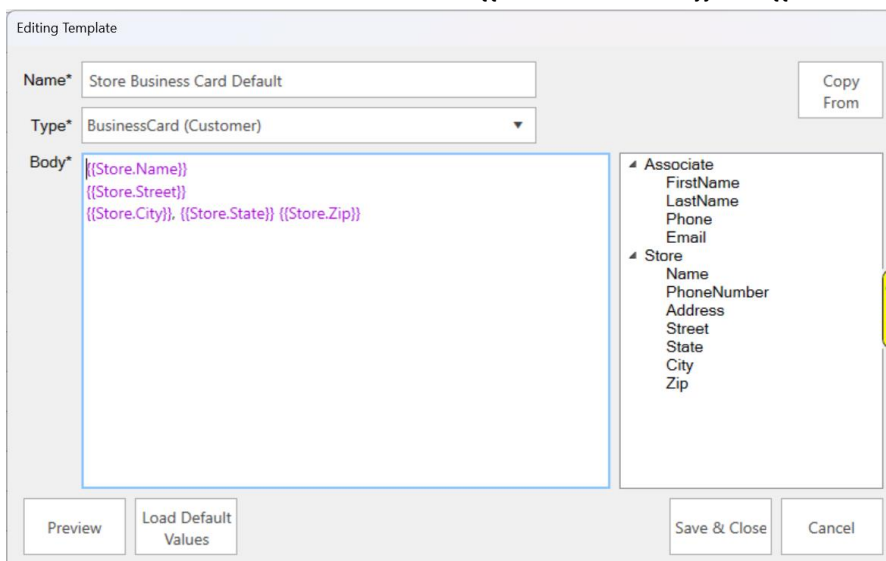
8. Position the cursor **before {{Store.Name}}** and hit **Enter** to drop to the next line. Type your greeting into that open line you just created, as seen below:

9. Click **Preview** again to see your changes.

10. Click **Save & Close** to save your template.

Now that you have created the template, you must instruct the software to use it. See the **Template Administration** section for more information.

Template Administration

By default, all **Notification Types** will be set to use the built-in Edge default. You can specify your own custom templates using the **Template Admin** screen. This can be used to specify both custom SMS and email templates.

To access **Template Admin:**

1. Click **Administrative > Notifications > Template Admin**. The **Template Admin** window will appear.

2. Use the drop-down to select the template you would like to use. In this example we selected the customized **Business Card** template created in the previous section.

3. After making your changes click **Save**, then **Close**.

Accessing SMS Business Card

As mentioned, Edge automatically sends Business Cards using the default template if you did not complete the steps above to edit/customize your own.

To access **SMS Business Card:**

- From the **Customer Record**: Either using **Customer > Find** or **Customer > Add**.

- From **POS**: Clicking the **Contacts** button.