

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

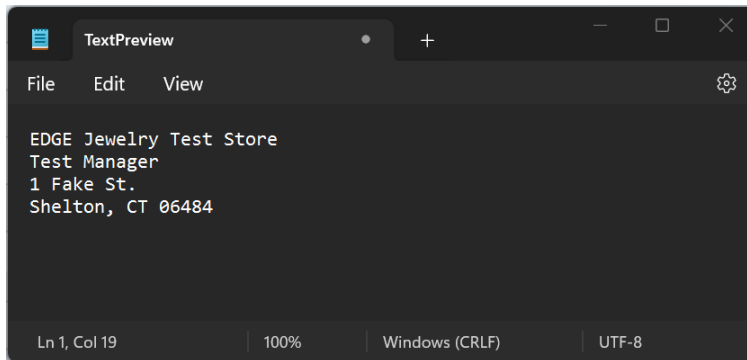
The easiest place to start is customizing our existing default templates. For this example, we will be creating a new default **Store Business Card Default** template that is based upon the built-in template we provide.

To do so:

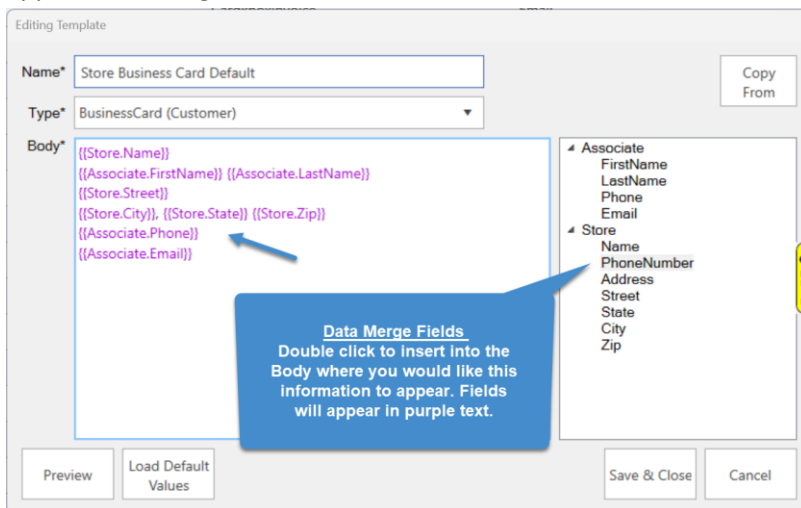
1. Click **Administrative > Notifications > Manage Notification Templates**, then click the **Add New SMS** button at the bottom.
2. Enter **Store Business Card Default** as the **Name** and select **Business Card** from the **Type** drop-down.
3. Next, click the **Load Default Values** button at the bottom. This will fill in the **Body** with the software's default values.

The screenshot shows the 'Editing Template' dialog box. The 'Name' field is 'Store Business Card Default'. The 'Type' dropdown is 'BusinessCard (Customer)'. The 'Body' field contains the following HTML code: `{{Store.Name}}`, `{{Associate.FirstName}} {{Associate.LastName}}`, `{{Store.Street}}`, `{{Store.City}}, {{Store.State}} {{Store.Zip}}`, `{{Associate.Phone}}`, and `{{Associate.Email}}`. A 'Load Default Values' button is highlighted with a red box. Other buttons include 'Copy From', 'Preview', 'Save & Close', and 'Cancel'.

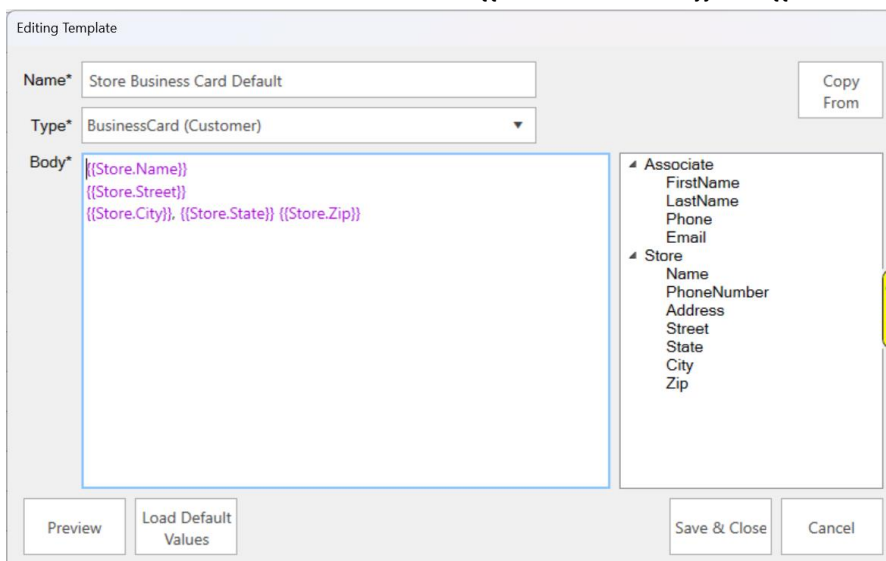
4. To see how your business card will look rendered, click the **Preview** button at the bottom.



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.

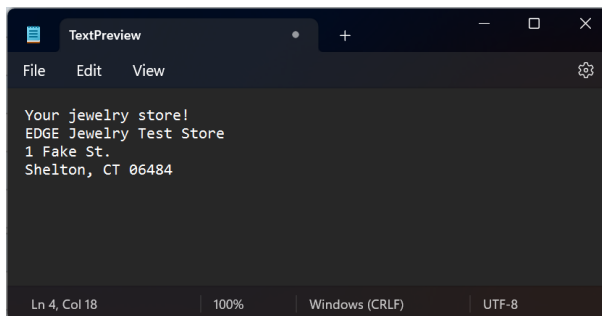


7. Click inside the HTML and erase the whole line for `{{Associate.FirstName}} {{Associate.LastName}}`, and then at the bottom erase both lines for `{{Associate.Phone}}` and `{{Associate.Email}}`.



- 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:

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



- 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**:

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

Name	Active Email Template	Active SMS Template
Repair Done	System Default	System Default
Custom Job Done	System Default	System Default
Appraisal Done	System Default	System Default
Wishlist Saved	System Default	System Default
Special Order Done	System Default	System Default
New Appointment Associate	System Default	System Default
Today's Appointments and Tasks	System Default	
Wishlist On Demand	System Default	
Layaway Inactivity	System Default	System Default
New Task	System Default	System Default
Blind Counts	System Default	System Default
Note Added	System Default	System Default

- 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.

The screenshot shows the 'Template Admin' window with a table of templates. The 'Business Card' row is highlighted, and the 'Active SMS Template' dropdown is set to 'Store Business Card Default'. A red box highlights this dropdown menu.

Name	Active Email Template	Active SMS Template
Appointment Notification Customer	System Default	System Default
Today's Appointments and Tasks	System Default	
Wishlist On Demand	System Default	
Invoice	System Default	System Default
Sales Notification	Default Email	System Default
Opportunity Notification	Default Email	Default Text
Business Card	System Default	Store Business Card Default

- 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**.

The screenshot shows the 'Edit Customer' window for a customer named 'Fake (001-11415)'. The 'Contact Methods' section is visible, showing a list of contact methods. A red arrow points to the 'SMS Card' button at the bottom of the contact methods list.

Method	Type	Who	Contact Address
Fake cell	Fake	(800) 000-0000	
Home	Fake	1 Fake St Denver, CO 80257	
preferred	Test	(800) 333-4444	
preferred	Test	fake@fake.com	
preferred	Test	1 mailing address Los Angeles, CA 90102	

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

The screenshot shows the 'Edit Customer Contacts' window. The 'Contact Methods' section is visible, showing a list of contact methods. A red arrow points to the 'SMS Card' button at the bottom of the contact methods list.

Method	Type	Who	Contact Address
Mobile	Dominick	(203) 430-6303	
Main	Dominick	dominick@ajslc.com	
home	Dominick	1 main st Naugatuck, CT 06770	