What's New in 2024 – Associates

Introduction

A series of exciting updates have been added to **Associates** beginning with **Edge version 24.1** designed to make managing your associates easier than ever before.

System Option

A new **System Option** was added giving you more control over **Task Notifications.** This option can be found by going to **Administrative > System Options > Tasks**, or by **searching** the option listed below.

- **Done Task Default Notify –** Defines how the associate that created the task gets **notified** when the task is **completed**. This **System Option** goes together with the existing 'New Task Default Notify' that defines how an associate is notified when a task is **assigned** to them. Notification options include **Text, Email**, or **Do Not Notify**.

Associate Schedule – Color Coded Shifts

The **Associate** Schedule now **color codes** associate shifts based on their **Initials Color** setting. This feature was first introduced with the **Notes** revamp feature where it defines what color to use for associate initials found on **Notes**.

- Navigate to **Administrative > Associates > Associate List** and select the **Associate**. Locate the **Initials Color** box on the **General** tab to set an associate's **Initial Color**.
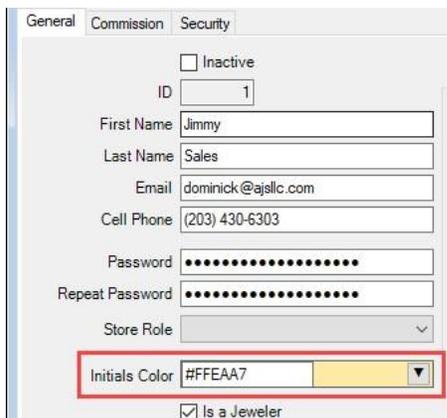
Time Card Updates

Tracking Associate Punches

Several key changes have been made to the **Time Card** feature that improve how you **track** and **manage** associate punches.

- Managers can now **Add, Edit,** and/or **Delete** punches.
- Edge now tracks associate **punch changes** and will display them on the **Security Log Report**.

Run Report Button

A **Run Report** button was added to the bottom of the **Time Card Punch list** that, when clicked, will open the **Security Log Report** with the **Time Card defaults** automatically selected.

Task Done Notification

Task Completed

A **Task Completed** option was added to both **Notification Templates** and **Template Admin** so notifications for completed tasks can be customized the same as others.

See the [Notification Templates](#) section of EdgeUser for documentation and videos detailing how to customize and manage your templates.

Done Task Default Notify

See the **System Option** section above for more information on the new **Done Task Default Notify** option that controls how associates are notified when a task is completed.

Wish Associate

The **Associate** that entered a **Wish List** item for a customer will now be displayed in the **Associate** box on the **Wish** record.