

New Desktop UI

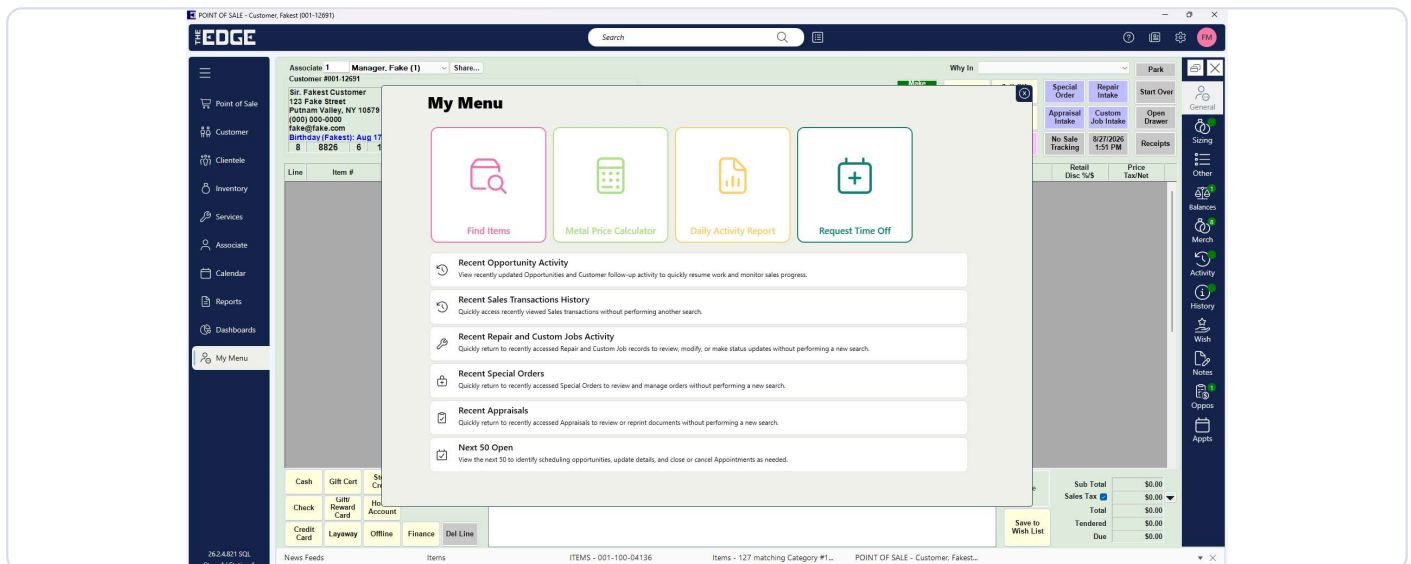
A modernized, streamlined workspace designed to make everyday business management faster and easier.

Overview

The **new Edge Desktop UI** introduced with Edge 26.2 provides a modernized, streamlined workspace designed to make everyday business management faster and easier while preserving the functionality your team already relies on.

The same core functionality available in the previous Desktop remains available, while the new Desktop adds more ways to search, navigate, personalize menus, organize information, and access frequently used Edge functions. These improvements are designed to reduce unnecessary clicks, simplify common workflows, and give each user more control over how they work in Edge.

Rather than changing what Edge can do, the new Desktop improves how you access and interact with those tools.



What's New

The new Desktop introduces several enhancements that work together to create a more flexible and efficient Edge experience:

- ▶ **Optional Docked Point of Sale** - Choose whether Point of Sale opens inside Edge or in a separate window.
- ▶ **Collapsible Navigation** - Quickly expand or collapse the left-side menu to access the functions you need.
- ▶ **Desktop Search** - Search across selected areas of Edge from one convenient location.
- ▶ **Most Recent Activity** - Quickly return to the 10 functions most recently accessed in Edge, regardless of login.
- ▶ **Updated List Views** - Search, select, organize, and save views with more intuitive on-screen controls.
- ▶ **My Menu and Favorites** - Build a personalized menu with the Edge functions you use most often.
- ▶ **Improved Settings** - Access reorganized settings with clearer sections and descriptions.

NOTE

The new Desktop UI is designed to add flexibility and convenience without removing the functionality available from the previous Desktop.

Getting Started

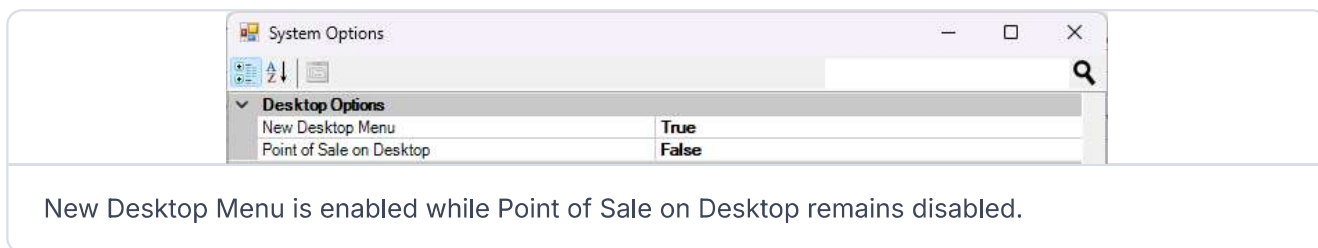
System Options

The new Desktop UI is activated by setting the **New Desktop Menu** System Option to **True**. This is the only System Option required to use the new Desktop. **Point of Sale on Desktop** is a separate, optional preference that controls how Point of Sale opens and does not need to be enabled for the new Desktop to function.

- ▶ **New Desktop Menu** - Replaces the previous Desktop with the new Desktop menu. This option must be set to **True** to activate and use the new Desktop UI.
- ▶ **Point of Sale on Desktop** - Opens Point of Sale inside Edge rather than in a separate window. This option is not required for the new Desktop and can be set based on your preferred Point of Sale experience.

Enable the New Desktop

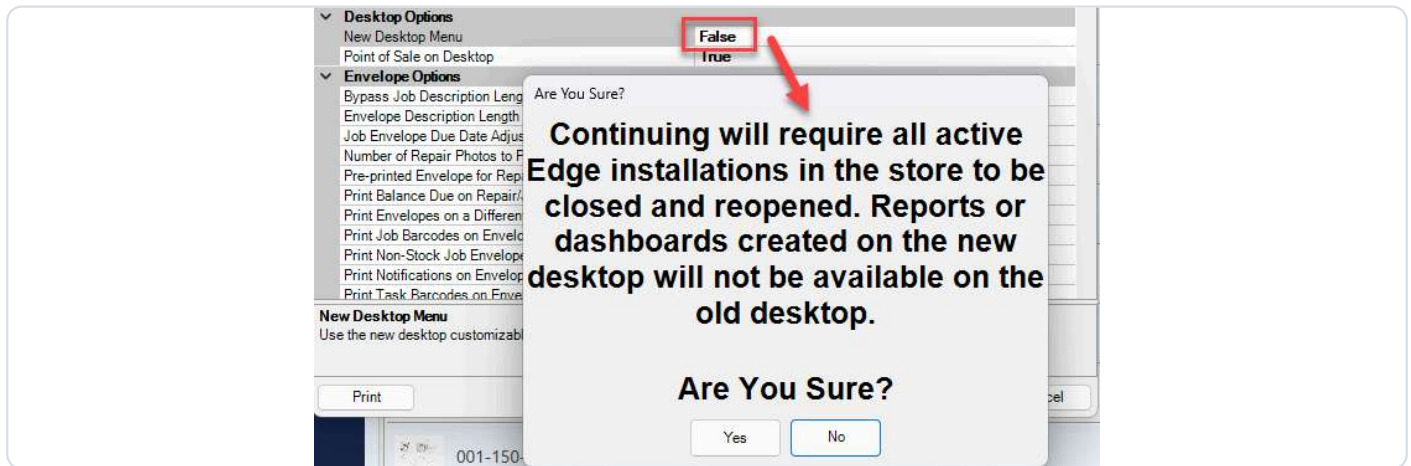
1. Use the **Search** bar at the top of the screen to find **System Options**, or click the gear icon in the upper-right corner and select **System Options**.
2. Locate the New Desktop section.
3. Set **New Desktop Menu** to **True**.
4. If desired, set **Point of Sale on Desktop** to **True** to dock POS inside Edge. Otherwise, leave this option set to **False**.



5. Click **OK** to save your changes, then restart Edge to begin using the new Desktop UI.

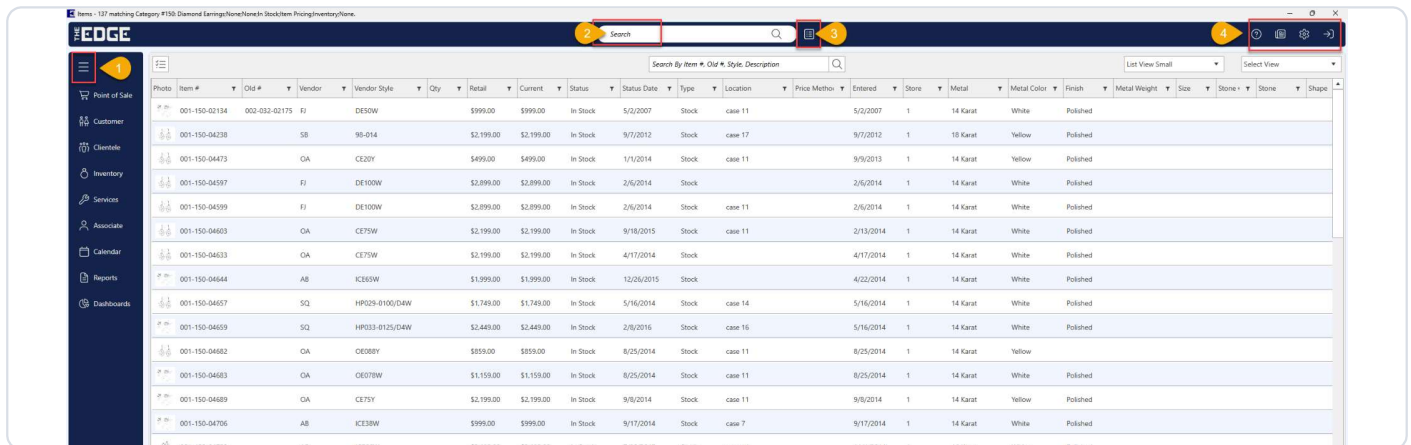
IMPORTANT

If you switch to the new Desktop UI and make or save changes to Reports, Dashboards, or other Desktop-specific settings, those changes will not carry over to the previous Desktop if you later switch back. The old and new Desktop environments maintain these changes separately, so anything created or modified while using the new Desktop will only be available there.



Navigating the New Desktop

The new Desktop brings key functions and resources together in one workspace. The example below highlights the four main areas you will use to navigate Edge, search for information, return to recent work, and access commonly used resources and options.

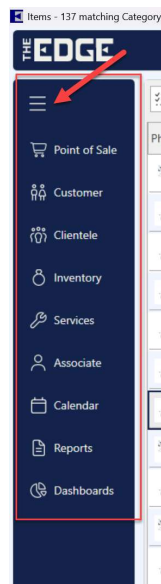


1. **Expandable Menu** - The left-hand menu contains the main Edge functions and is collapsed by default to provide more room on the screen. Select the menu icon to expand it when you need to navigate to another area of Edge.
2. **Search** - The **Search** bar at the top of the Desktop lets you search across the areas of Edge included in your Desktop Search settings.
3. **Most Recent** - Select the **Most Recent** button to view the 10 functions most recently accessed in Edge and quickly return to recent work.
4. **Desktop Resources** - The four icons at the top right provide quick access to Help (Knowledge Base), Newsfeed, **Settings**, and Sign Out.

Expandable Menu

The navigation menu on the left side of the new Desktop is collapsed by default, giving you more room to work while keeping the main Edge functions close at hand.

Select the menu icon to expand the navigation panel and access Point of Sale, Customer, Clientele, Inventory, Services, Associate, Calendar, Reports, and Dashboards. **My Menu** will also appear there when an Associate is logged in. You can collapse the menu again whenever you want to maximize your workspace.



Expanded

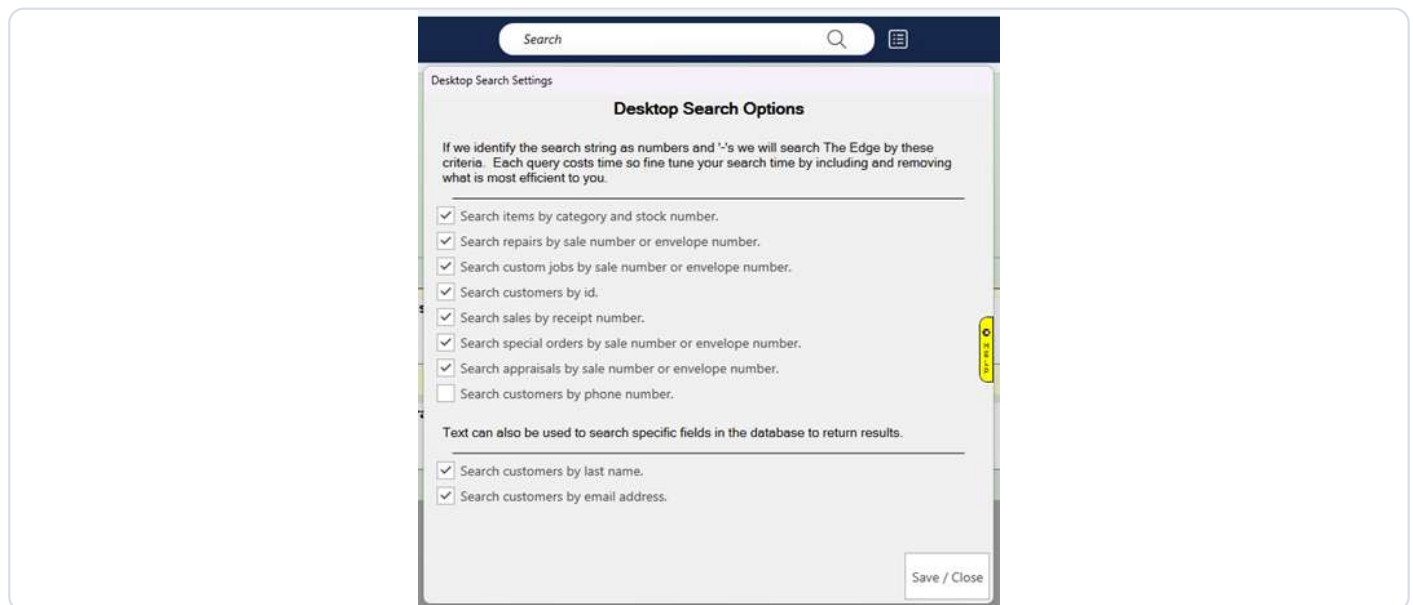


Collapsed

Desktop Search

The new Desktop includes a global Search feature that allows you to locate information across Edge without first navigating to a specific menu.

You can control what is included in Desktop Search through **Desktop Search Settings**. If there are areas you do not need included in your searches, they can be disabled to narrow results and help searches return the information most relevant to your work.



Customize Desktop Search

1. Open **Settings > Advanced Settings**.
2. Select **Desktop Search Settings**.
3. Choose which areas of Edge should or should not be included in your Desktop searches.
4. Save your changes.

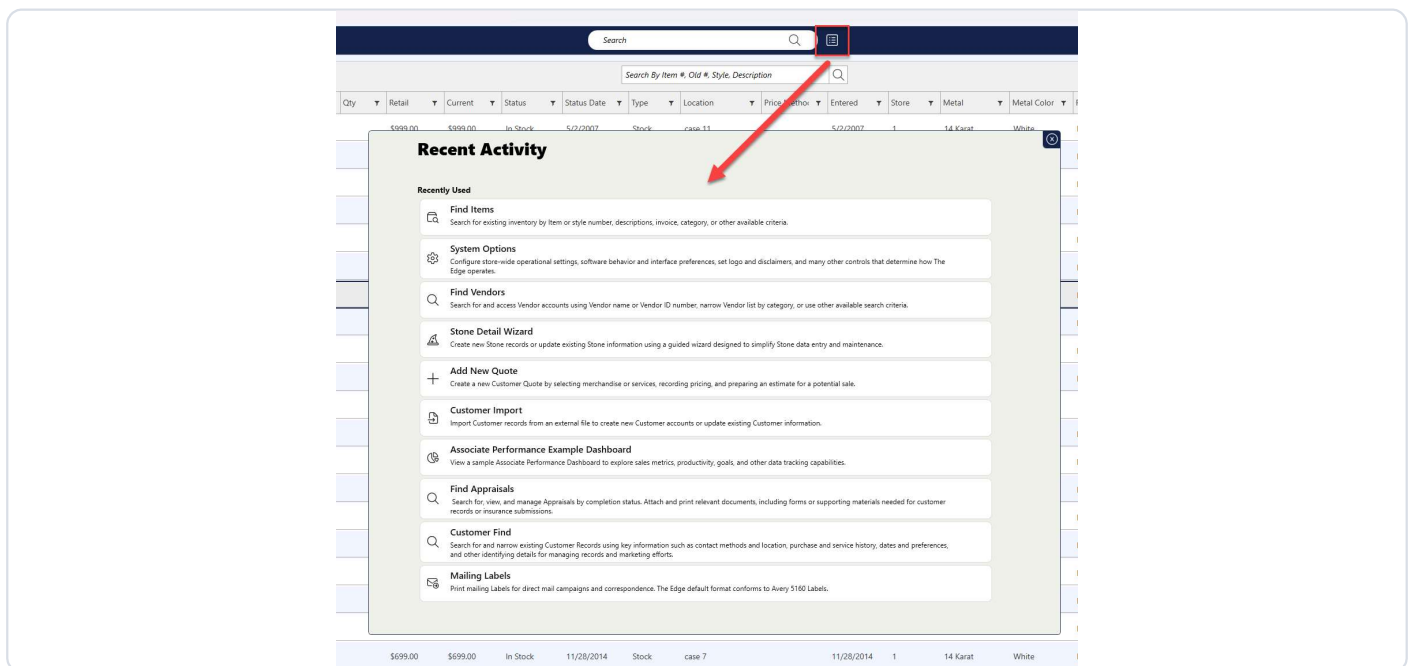
NOTE

Desktop Search settings give each store more control over the scope of searches and can help reduce unnecessary results.

Most Recent Activity

The **Most Recent** button displays the 10 functions most recently accessed in Edge. Recent Activity is not tied to a specific Associate login; it reflects activity from anyone using Edge, making it easier for any user to return to work that was recently accessed.

Select any function shown in Recent Activity to open it again without navigating through the full menu structure. This is especially helpful when moving between tasks or returning to work that another user recently accessed.



NOTE

The screenshot above is an example only. Recent Activity will look different for each store because it displays the 10 functions most recently accessed in that Edge environment.

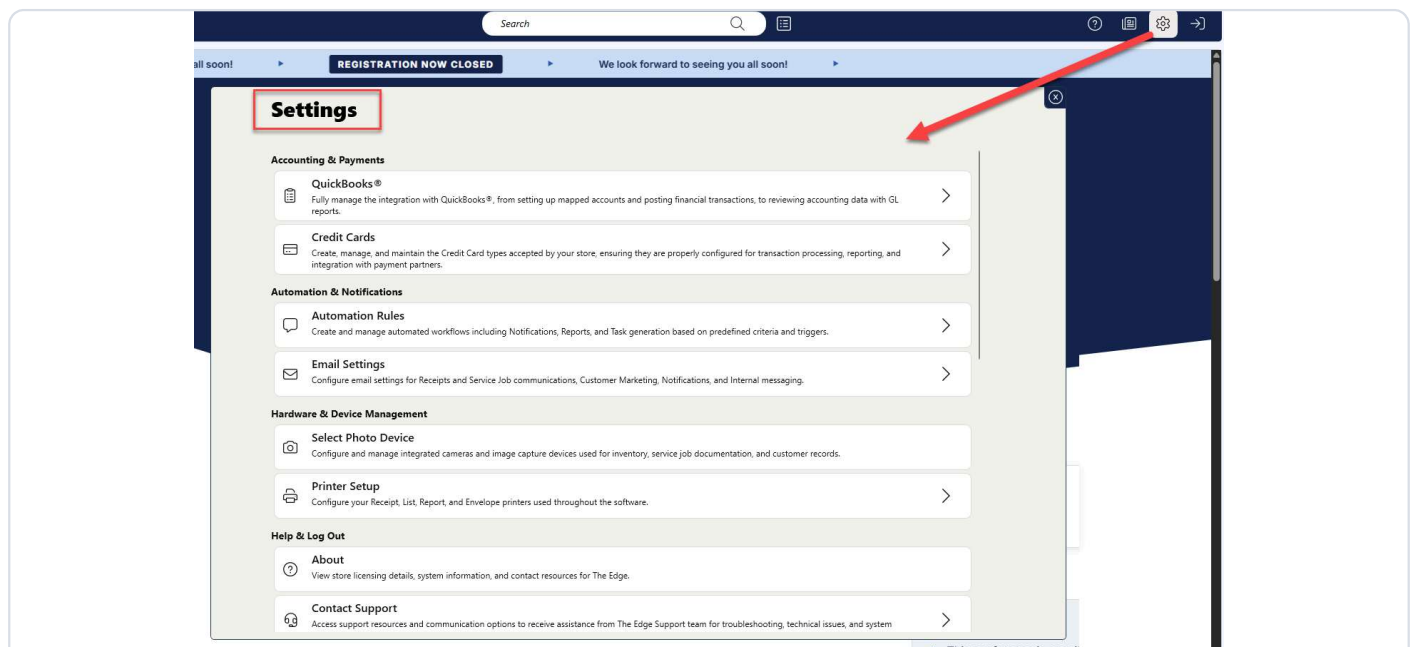
Desktop Resources

The four icons at the top right of the new Desktop provide quick access to frequently used resources and options without requiring you to open the left-hand navigation menu.



- ▶ **Help (Knowledge Base)** - Opens Edge help and instructional resources.
- ▶ **Newsfeed** - Opens available Edge news and updates.
- ▶ **Settings** - Opens the reorganized **Settings** area where you can manage Desktop, menu, search, and other available configuration options.
- ▶ **Sign Out** - Sign out of the current Associate session or sign in as a different Associate.

These resources and options remain available at the top right of the Desktop so you can access them quickly from your current workspace.

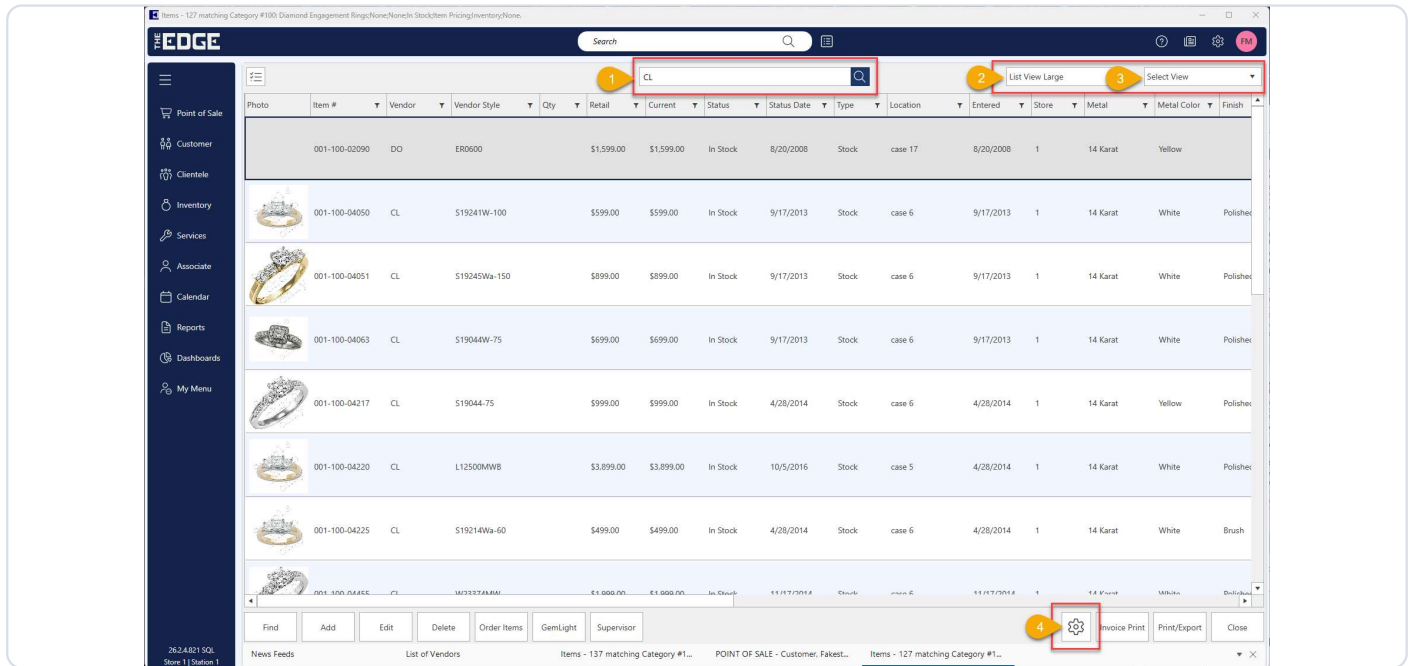


The Settings window, opened from the gear icon, groups related options into sections with a description of each.

Updated List Views

List Views throughout Edge have been updated to make finding, filtering, and organizing records faster and more intuitive. Common controls are now available directly on the screen, giving you more ways to refine the information displayed and save layouts that support the way you work.

The example below highlights the primary List View controls available from the Inventory list:



- 1. Search** - Further filter the records currently displayed by searching for specific information such as Vendor, Type, Item #, Style, Description, and other available criteria.
- 2. List Display Options** - Change how records are displayed within the current List View using the available display options.
- 3. List Layouts** - Use **Select View** to load a saved List View, return to **Program Defaults**, or use the **Most Recent** list configuration.
- 4. List Settings** - Select the gear icon to choose which columns are displayed, adjust the information included in the list, and save a custom List View for future use.

Filter Your List with Search

The List View Search lets you further narrow the records already displayed on the screen. Enter specific criteria such as a Vendor, Type, Item #, Style, Description, or other searchable information to quickly filter the list without rebuilding the original search.

In the example below, entering Vendor code CL filters the Inventory list to display matching items from that Vendor.

The screenshot displays the 'THE EDGE' software interface. At the top, a search bar contains the text 'CL'. Below the search bar, a table lists inventory items. The table columns include Photo, Item #, Vendor, Vendor Style, Qty, Retail, Current, Status, Status Date, Type, Location, Entered, Store, Metal, Metal Color, and Finish. The table is filtered to show only items from Vendor 'CL'. A red box highlights the search bar, and a red arrow points from it to the 'Vendor' column in the table. The table shows several rows of diamond engagement rings, all with Vendor 'CL'. The bottom of the screen shows a status bar with various icons and text.

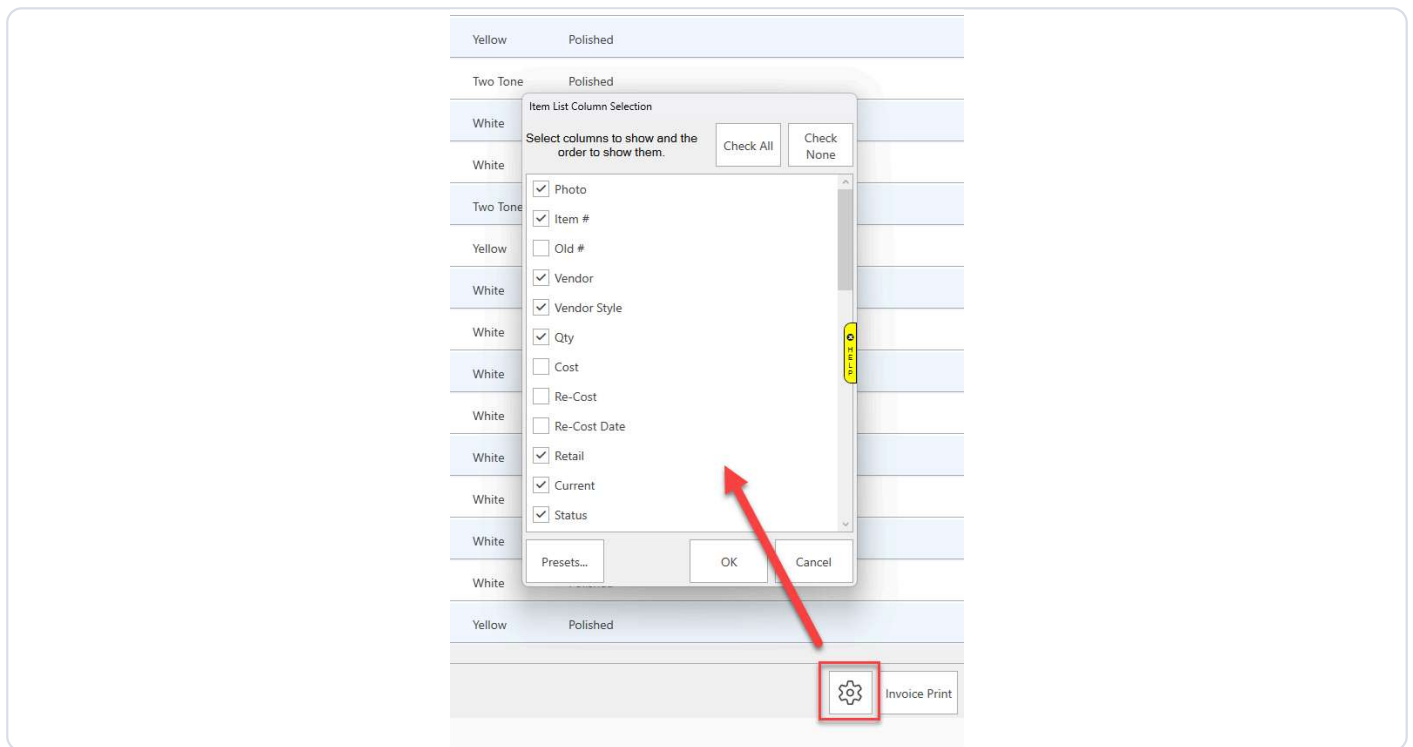
Photo	Item #	Vendor	Vendor Style	Qty	Retail	Current	Status	Status Date	Type	Location	Entered	Store	Metal	Metal Color	Finish
	001-100-02090	ER0600			\$1,599.00	\$1,599.00	In Stock	8/20/2008	Stock	case 17	8/20/2008	1	14 Karat	Yellow	
	001-100-04050	CL	S19241Wa-10		\$599.00	\$599.00	In Stock	9/17/2013	Stock	case 6	9/17/2013	1	14 Karat	White	Polisher
	001-100-04051	CL	S19245Wa-150		\$899.00	\$899.00	In Stock	9/17/2013	Stock	case 6	9/17/2013	1	14 Karat	White	Polisher
	001-100-04063	CL	S19044W-75		\$699.00	\$699.00	In Stock	9/17/2013	Stock	case 6	9/17/2013	1	14 Karat	White	Polisher
	001-100-04217	CL	S19044-75		\$999.00	\$999.00	In Stock	4/28/2014	Stock	case 6	4/28/2014	1	14 Karat	Yellow	Polisher
	001-100-04220	CL	L12500MW8		\$3,899.00	\$3,899.00	In Stock	10/5/2016	Stock	case 5	4/28/2014	1	14 Karat	White	Polisher
	001-100-04225	CL	S19214Wa-60		\$499.00	\$499.00	In Stock	4/28/2014	Stock	case 6	4/28/2014	1	14 Karat	White	Brush

Create and Save a Custom List View

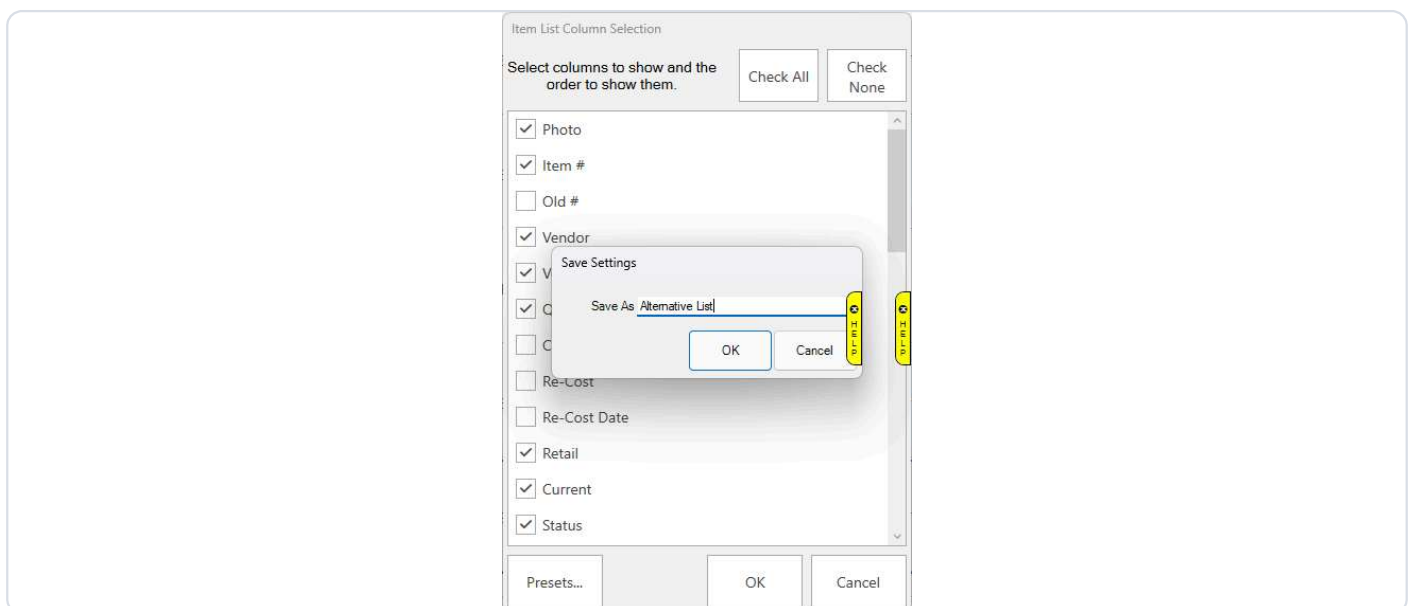
You can customize the columns shown in a List View and save that layout so it can be quickly used again.

1. Click the gear icon at the bottom of the List View to open the **Item List Column Selection** window.

2. Check or uncheck the columns you want included in your List View. You can also arrange the columns in the order you want them displayed.



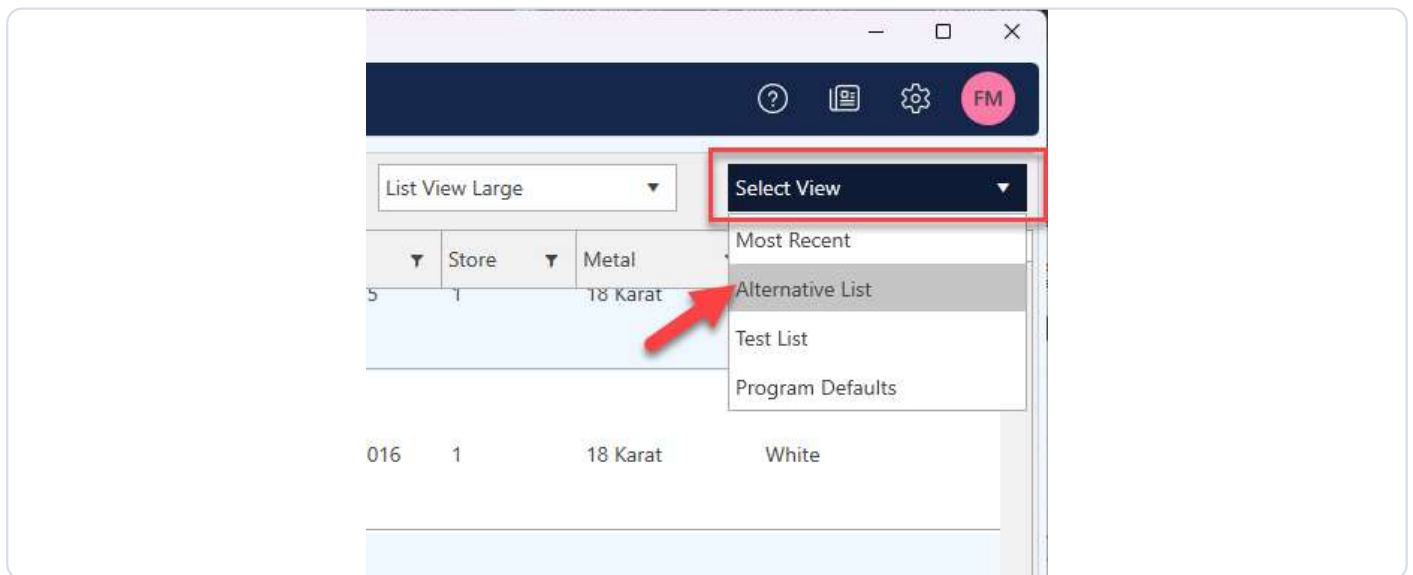
3. Click **Presets** > **Save Settings**.
4. Enter a name for your new List View and click **OK**. Click **OK** again on the **Item List Column Selection** window to load the new layout.



Access Saved List Views

Use the **Select View** dropdown to quickly switch between your saved List Views and the standard options available in Edge. **Program Defaults** restores the original Edge layout, while **Most Recent** loads the list settings you used most recently - even if that configuration was not saved as a named List View.

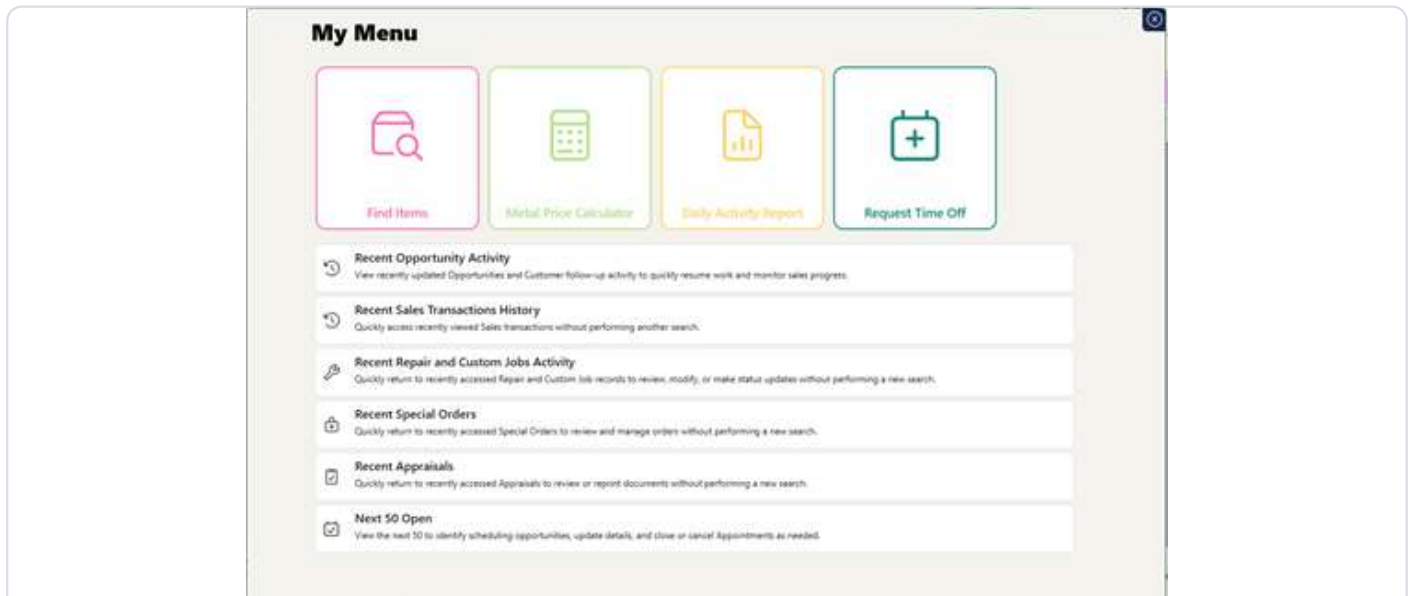
Any List Views you save will also appear in this dropdown, allowing you to move between different layouts without repeatedly selecting and arranging the same columns.



My Menu and Favorites

The new Desktop gives users more control over their individual workspace through **My Menu** and Favorites.

After logging in, users can add frequently used Edge functions to **My Menu** so they can reach the tools they use most without navigating through multiple menus.



A completed My Menu with Favorites across the top and Recent Activity listed below.

Personalize My Menu

My Menu can be adjusted to better match each user's responsibilities and workflow. Users can:

- ▶ Add frequently used functions.
- ▶ Reorder functions so the most important options appear first.
- ▶ Hide options they do not need.
- ▶ Create a more focused workspace based on their day-to-day responsibilities.

Add a Function to Favorites

1. Locate the Edge function you use frequently.
2. Right-click the function and select **Add Favorite**.
3. Choose whether to add the function as a Favorite within its existing menu or add it to **My Menu**.

For example, a user who frequently works with Inventory Purchase Orders can add that function to the Inventory menu Favorites, **My Menu**, or both for faster access.

Remove a Favorite from My Menu

1. Use the **Search bar** at the top of the screen to find **User Menu**, or click the gear icon in the upper-right corner and select **Menu Management > User Menu**.
2. Under **Favorites**, locate and select the function you want to remove from **My Menu**.
3. Click **Hide**, then click **Yes** when prompted to confirm.
4. The function will appear with a strikethrough, indicating that it will no longer appear under **Favorites** in **My Menu**.
5. To add the function back to **Favorites**, select it and click **Unhide**.

NOTE

Hiding a function from Favorites only removes it from **My Menu**; it does not remove or disable the function elsewhere in The Edge.

Menu Management

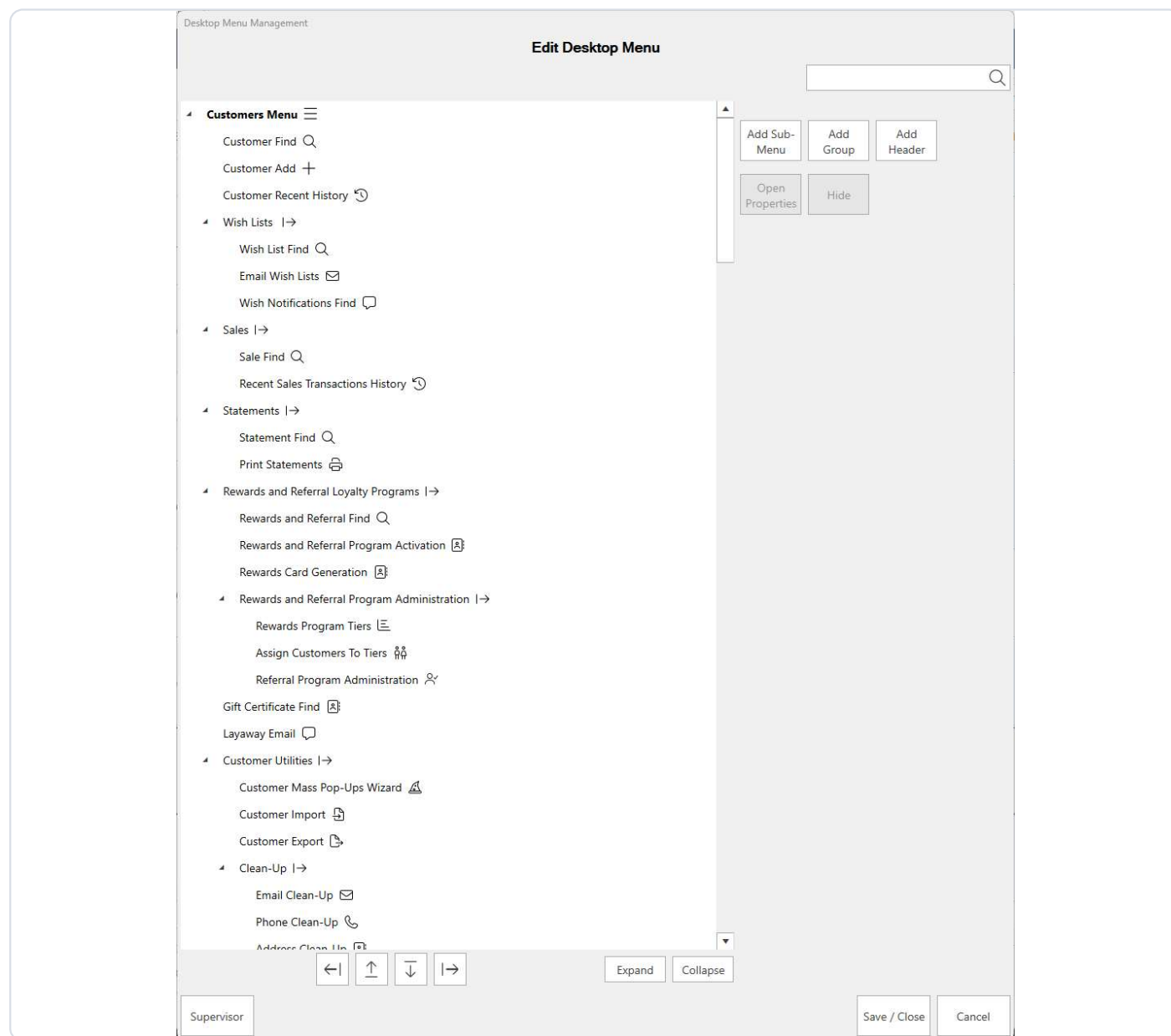
Additional menu management options are available from **Settings** for users with the appropriate permissions. These tools provide control over the broader Application, Reports, Dashboard, and User menus.

This allows stores to organize commonly used functions more prominently while keeping less frequently used options available when needed.

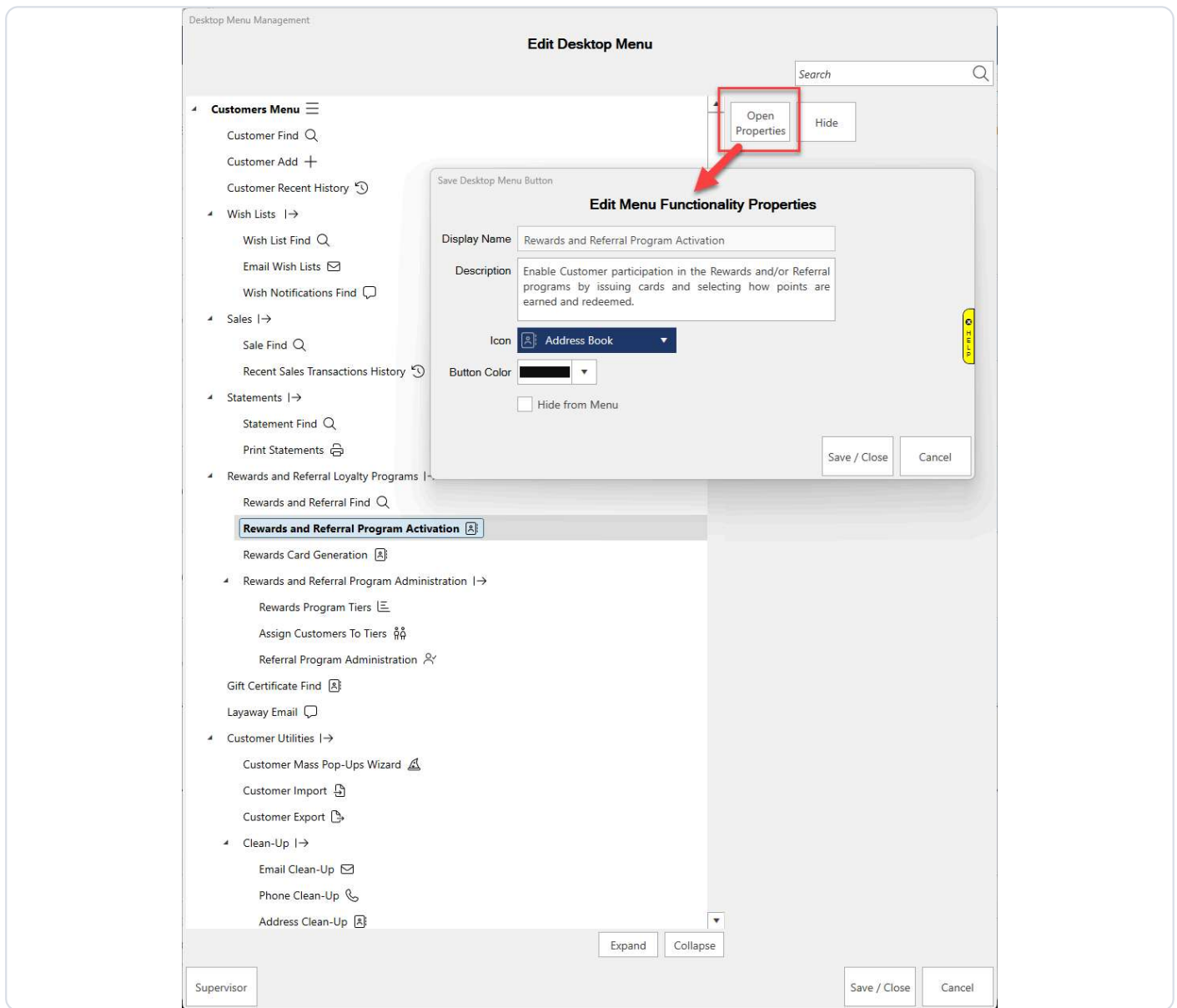
Customize the Full Application Menu

Users with the appropriate permissions can personalize the **Full Application Menu** to make frequently used functions easier to identify and access. Menu functions can be assigned a different icon or button color, and functions that are not needed can be hidden from the menu.

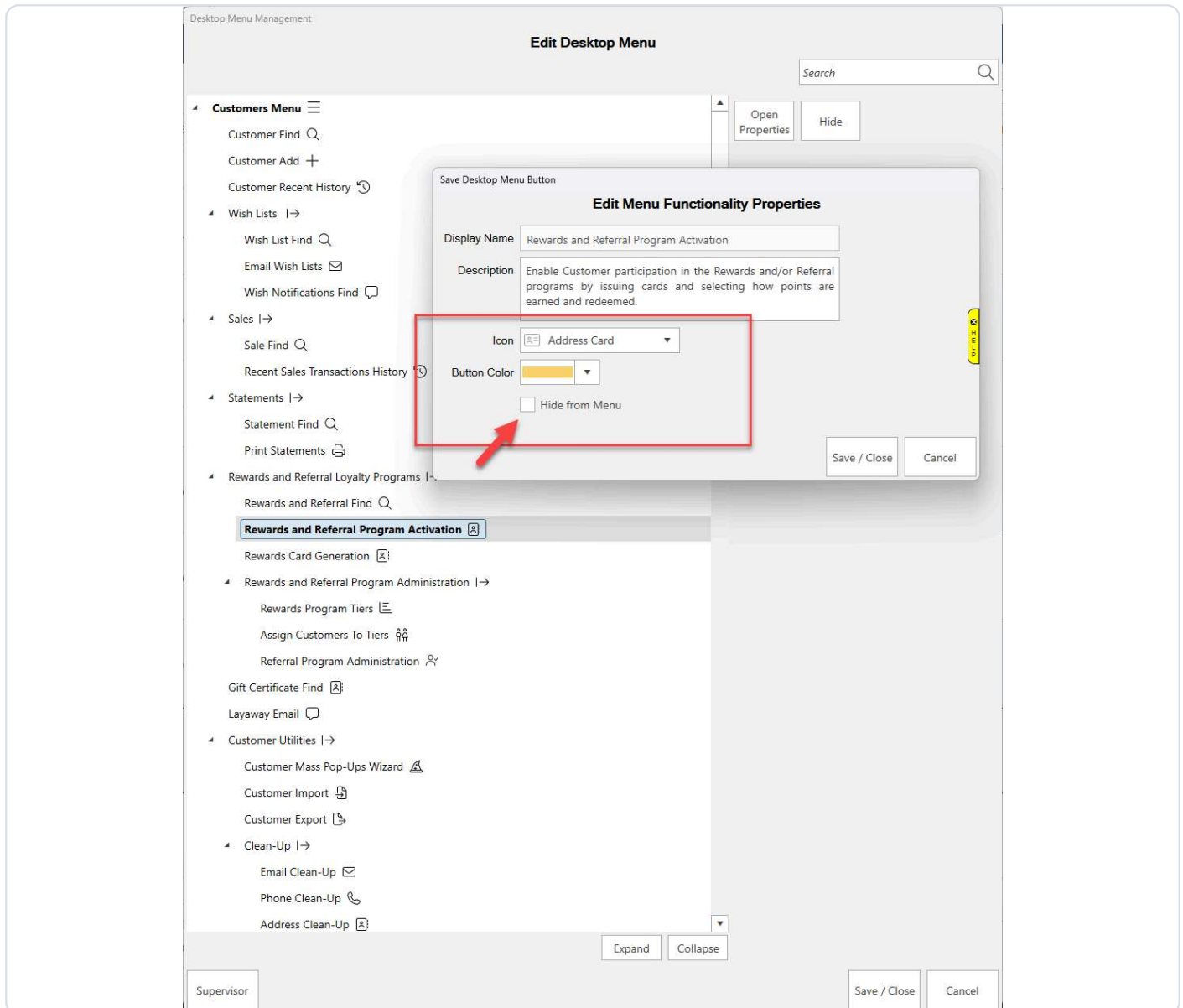
1. From the new Desktop, navigate to **Settings > Menu Management > Full Application Menu**.
2. The **Edit Desktop Menu** window will open, displaying the functions available throughout the Application Menu.



3. Select the menu function you want to customize, then click **Open Properties** to open the **Edit Menu Functionality Properties** window.



4. Personalize the selected function by choosing an alternate Icon from the dropdown menu and, if desired, selecting a **Button Color**. Choosing an icon that is easier to recognize can help users locate functions more quickly, while color-coding commonly used or related features provides another way to personalize how you work in Edge. You can also select **Hide from Menu** if you do not want the function displayed.



5. Click **Save / Close** to save your changes. The updated icon and color will appear when browsing the applicable menu, making the function easier to recognize based on the way your store has chosen to organize Edge.

Customer > Rewards and Referral Loyalty Programs

Rewards and Referral Find
Locate Customer Rewards and Referral accounts to review membership details, point balances, transaction history, and program activity.

Rewards and Referral Program Activation
Enable Customer participation in the Rewards and/or Referral programs by issuing cards and selecting how points are earned and redeemed.

Rewards Card Generation
Generate Rewards cards and activate customer enrollment by issuing card numbers without requiring a physical card.

Rewards and Referral Program Administration
Configure and manage the Customer Rewards and Referral programs, including assigning Rewards tiers and activating the optional Referral program.

Example: A customized icon and button color shown in the Rewards and Referral Loyalty Programs menu.

POS on the New Desktop

POS can be docked inside the main Edge application by setting **Point of Sale on Desktop** to **True**. When enabled, opening POS displays it within Edge rather than opening it in a separate window.

POINT OF SALE - Customer, Falkst (001-12691)

EDGE

Associate 1 Manager, Falkst (1) Share...

Customer #001-12691
Sir, Falkst Customer
123 Fake Street
Putnam Valley, NY 10579
(000) 000-0000
falkst@falkst.com
Blondy (Falkst) Aug 17, 1971
8 8826 6 11360 1893 06/2026

Find Card Notes / Edit Contacts Open (1)
New Card Wish List Appra Quites
No Name Ship...

Why In Sell Item Sell Gift Certificate Special Order Repair Intake Start Over
Pick Up / Touch Misc Charge Sell / Activate Card Appraisal Intake Custom Job Intake Open Drawer
Cancel Order Trade / Buy Return / Adjust No Sale Tracking Receipts

Line	Item #	QTY	Description	Retail Price / Sub	Price Tax/Net
1	001-150-04792		0.68-0.73ct tdw 14kwy Ideal Cut Diamond Stud Earrings	\$2,499.00	\$2,499.00
				0.00%	\$158.00
				\$0.00	\$2,657.00
					\$289.99
2	001-170-00883		0.24ct tdw 18kwy & Stainless Steel Dark Brown Diamond	\$1,499.00	\$1,499.00
				0.00%	\$95.18
				\$0.00	\$1,594.18
					\$0.00

Include Care Plan Lifetime Jewelry Care Protection Plan for \$289.99

Include Care Plan

Cash Gift Cert Store Credit Tender Amount

Check Lull Reward Card House Account Credit Card Layaway Offline Finance Del Line

Done Sub Total \$4,262.00 Sales Tax \$251.87 Total \$4,524.86 Tendered \$0.00 Save to Wish List Due \$4,524.86

News Feeds List of Vendors Items - 137 matching Category: Customer, Falkst...

This setting is optional and is not required to use the new Desktop UI. If **Point of Sale on Desktop** remains set to **False**, POS will continue to open in a separate window, allowing each store to choose the experience that best fits its workflow.

Even when POS is docked, certain workflows may still bring the POS window out separately when needed. For example, parking a sale can open the window separately so the transaction can continue to be managed appropriately.

Benefits of the New Desktop UI

The new Desktop UI combines familiar Edge functionality with new tools designed to help stores work more efficiently and tailor the software to the way their teams operate.

- ▶ **Faster navigation** - Keep commonly used functions easier to reach and reduce time spent moving through menus.
- ▶ **More personalized workflows** - Use **My Menu**, Favorites, saved views, and search settings to organize Edge around individual responsibilities.
- ▶ **Easier access to information** - Search across Edge or within individual lists using more intuitive search tools.
- ▶ **Less repetitive setup** - Save custom List Views and return to them whenever they are needed.
- ▶ **More on-screen controls** - Complete common List View actions without relying as heavily on right-click menus.
- ▶ **A more connected workspace** - Access navigation, Search, **Settings**, the Knowledge Base, and the Newsfeed from a unified Desktop, with the option to dock POS inside Edge.
- ▶ **Greater control** - Configure search scope, menus, Favorites, and personal workspace options to better support how your store operates.

The goal of the new Desktop is to make everyday business management in Edge more efficient without requiring users to give up the tools and functionality they already know. By combining the capabilities of the previous Desktop with expanded customization and navigation options, the new Desktop provides a more flexible foundation for running your business in Edge.