



# Automated Service Notifications

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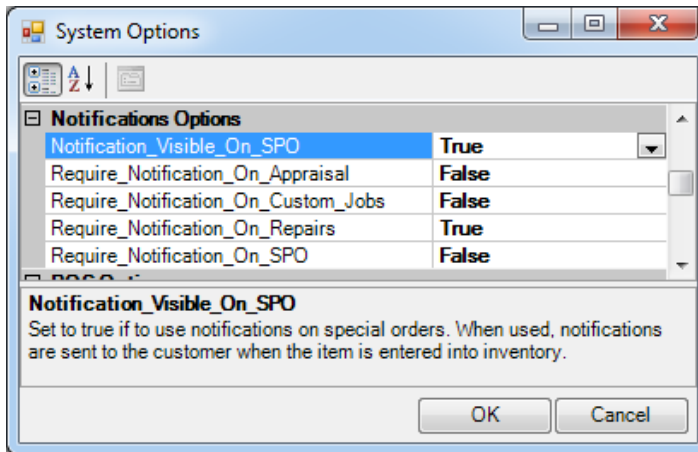
## Introduction

Customers can be notified via email or text message of completed services such as repairs, special orders, or appraisals. No need for associates to manual calls and no need for your customers to call you. For example, rather than tell a customer to come back in an hour, you can tell them you'll send an email or text when his or her order is ready.

## System Options

To require an associate to select a notification method on intake, set the option to `True` for each service job type. In addition, you may choose whether to show the notification option on services at intake. If automatic notifications are used on services, the customer would be notified the moment the service is marked complete or the special order allocated.

1. Select **Administrative=>System Options** and scroll down to **Notification Options**.

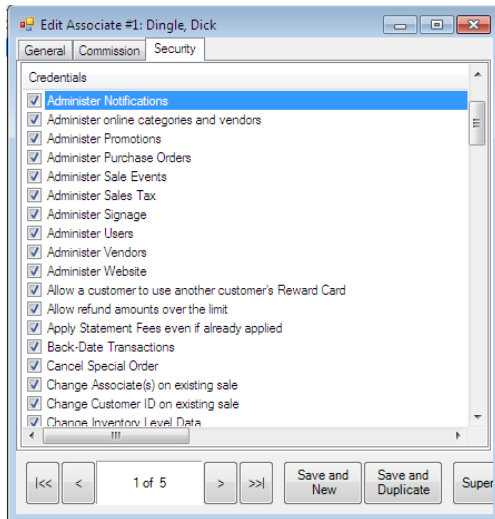


2. Set the desired notifications options.
3. Select **OK**.

## User Permissions

Associates who should be able to administer automated notifications must be granted permissions to do so. To grant that access:

1. Select **Administrative=>Associates**.
2. Select the associate's record and select **Edit**.
3. Select the **Security** tab.

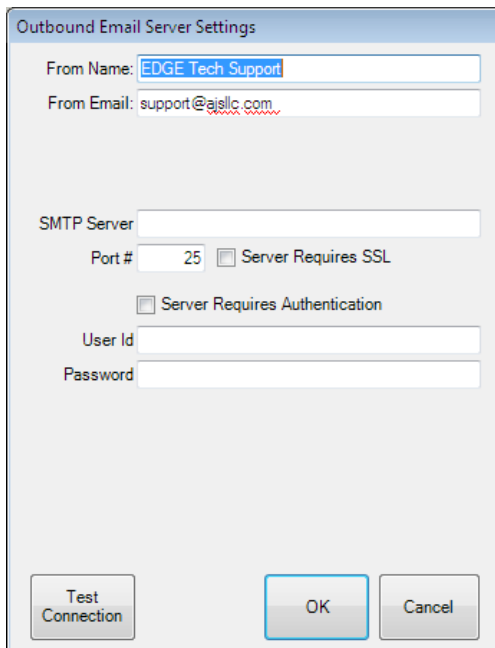


4. Check the option to permit **Administer Notifications**.
5. Select **OK/Save and Close**.

## Configuring Email Settings

Email and SMS notifications require setup. The Edge must be configured to use the email settings associated with your store email account. The fields marked with an asterisk below are specific to your email account. You should contact your email vendor or ISP (internet service provider) and ask them specifically for this information. To configure email settings to your SMTP server for Notifications:

1. Select **Administrative=>Email Settings=>Notifications**. The **Outbound Email Server Settings** window will appear.



Fields to be completed in the **Outbound Email Server Settings** window include:

<b>From Name</b>	The name that you want to appear as the sender of the receipt. This will probably be your store name.
<b>From Email</b>	The email address from which the receipt is being sent. This will be your store email account.
<b>SMTP Server*</b>	The outbound server as provided by your email provider. It will probably be an SMTP account.
<b>Port #*</b>	The port number with which your email interacts.
<b>Server Requires SSL*</b>	Whether the outgoing server requires a secure socket layer.
<b>Server Requires Authentication*</b>	Whether the outgoing server requires authentication.
<b>User ID*</b>	The email account's user ID.
<b>Password*</b>	The password for the email account.

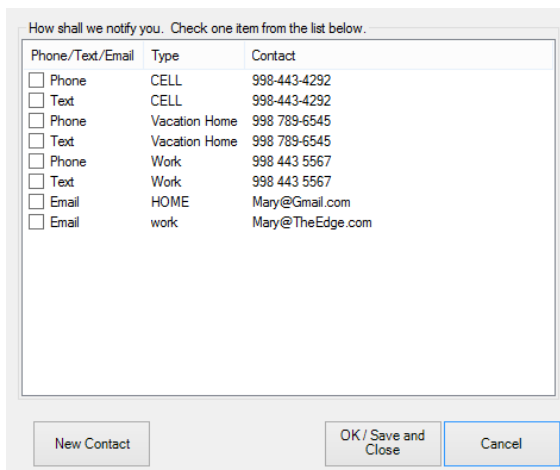
### Configuration of SMS Settings

SMS allows you to send notifications by text message to customers. SMS is a feature that must be activated by The Edge Customer Support. To use SMS messaging for notifications, contact [Admin@ajsllc.com](mailto:Admin@ajsllc.com). If you sign up, you'll be issued a new license, and then you need only enable the feature.

### Sending Notifications

Notification is indicated at the point of intake of the special order, custom job, appraisal, or repair transaction. The associate who takes the order will ask the customer how he or she wishes to be notified when the order is ready. To indicate how the customer would like electronic notification:

1. At intake, find the customer record.
2. While in the special order, custom job, repair intake, or appraisal intake screen, select the notification type from **Notify** drop-down. A list of customer contact information will appear.



3. Each phone number has an email, text, or phone option. Phone number contacts are just for recording purposes. Text or email choices are sent to the recipient when the job is marked completed.
4. To add another email or telephone number, select **New Contact**. You can also provide an alternate e-mail address by selecting **New Email**. If you add a new email address to the customer’s record here, it will be available for use in other electronic notifications. Select **OK/Save and Close** to return to the **POS** screen.
5. Later, when the repair or service is complete, the jeweler marks the job as done, and the service notification will be sent.

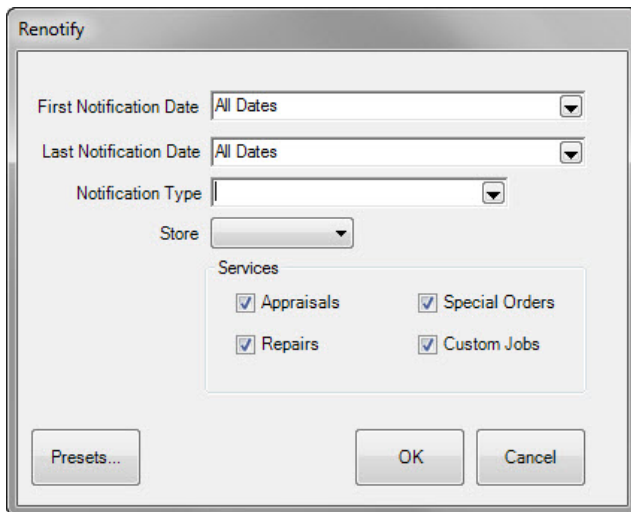
**NOTE!**

**Email and SMS Content Setup can be found in a separate tip sheet, Notification and Email Receipt Setup.**

### Resending Service Job Notifications

Notifications can be resent on a case-by-case basis from the job record **Supervisor** menu. However, if you wish to resend notifications to many customers concerning a services such as custom jobs, repairs, appraisals, or special orders:

1. From the **Services** menu, select **Notifications Re-Notify**. The **Re-Notify** filter will appear.



Filters and options in the **Re-Notify** filter include:

- First Notification Date** Returns records with the selected initial notification date.
- Last Notification Date** Returns records with the selected last notification date.
- Notification Type** Returns records with notifications that were of the specified type:
  - Email
  - Phone

- Text.

**Store**

Returns records with notifications sent from the specified store.

**Services**

Returns records of notifications of the specified services:

- Appraisals
- Special Orders
- Repairs
- Custom Jobs.

2. Make filter selections and select **OK**. A list of matching records will appear.

Customer	Type	Service Id	Notification Type	Notification Address	Notification First Sent	Notification Last Sent	Total Notifications Sent	Additional Description
<input checked="" type="checkbox"/> Big, Don (001-00076)	RepairDone	001-117116-001	Text	2036136265	10/14/2014	10/14/2014	1	old gold
<input checked="" type="checkbox"/> Prion, Lenny (001-00230)	RepairDone	001-126395-001	Text	2036136265	10/14/2014	10/14/2014	1	Ring

3. Check the records you wish to re-send, and select **Send**. The notification will be sent and the record will be updated to reflect the last notification sent.

## Best Practices

When setting up email or SMS notifications, you'll want to consider what happens when a customer replies or tries to call the SMS number. When setting up your email and text headers, footers, and default messages, you might consider indicating that the email or number is not monitored. See the tip sheet entitled Automated Notification and Email Receipt Setup.