



Using Podium with The Edge

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Introduction

Podium is a reputation management company that helps you obtain and publish store reviews on several popular listing sites such as Google and Facebook.

For more information and to sign up for Podium, contact The Edge Customer Service team at service@ajsllc.com.

System Options

Once you have Podium licensed, there are a couple System Options you should check.

Podium Contact Method

Shows options for sending texts and emails via Podium. Options are:

`Only Send Correct Phone Email`: Without offering options at POS, Podium will automatically send the customer a text message or email, if correctly formatted information is provided, asking for a review.

`Open Phone Email Selector Every Time`: Offers the prompt at POS with every customer transaction asking for verification of data and whether to send text or email.

`Open Phone Email Selector When Defaults Not Correct`: If the phone number or email address are not available or of the correct format, The Edge will open the selector window for further action.

Podium Retry Period

To ensure that your customers are not sent too many requests, this option allows you to select how many days should pass between requests. Podium sets the minimum at 60 days, but you can use this setting to increase the number of days.

Podium Send Always

If `True` then Podium will always send a request for any transaction. If `False`, then Podium will only send requests on appraisal pickup, customer job pickup, layaway pickup, memo pickup, repair pickup, gift cert sale, tender card sale, item sale, special order pickup, and trade in. It will not send requests for interim transactions such as repair intake. The default is `False`.

Associate Setup

Emails and text messages will come from your store. Emails will show your store name and noreply@share-feedback.com in the header. Text messages will come from the number assigned by Podium.

For your Podium dashboard to show what associate sent out emails or texts and for Podium to track that data, set up a member account in Podium for each associate in The Edge. To do this:

1. Make sure your associates all have their email addresses in The Edge. Go to **Administrative ► Associates** and check each associate record for the email address. For more about working with associate records, see the section in the User Guide entitled *Managing Associates*. (<http://docs.edgeuser.com/NetHelp/Documents/managingassociates.htm>).
2. From your Podium Dashboard, go to the **Manage** tab.
3. Go to the **Team Member** screen.
4. Create a team member for each associate that will be using The Edge; be sure to use the same email for the team member listing as is in The Edge. If there is no associate with a matching team member record in Podium, the email or text will be attributed to the general API account.

Note that if there is a commission split, Podium will use the associate with the bigger split, if there is one. If there is not, the first associate of record will be used.

Using Podium

To work with Podium at POS:

1. Complete the transaction as usual. When you select **Done**, one of two things will happen according to the system options listed above:
 - a. If you have **Only Send Correct Phone Email** selected, Podium will seamlessly send a text or email, whichever is first available with good data. The Edge will proceed to complete the sale and you should work with receipts as usual. You will not have any interaction with Podium.
 - b. If you have **Open Phone Email Selector Every Time** or **Open Phone Email Selector When Defaults are Not Correct**, and the defaults are indeed incorrect, the **Podium** window will open. Proceed to step 2.
2. The **Select a Cell Phone Number and/or Email to Send a Review Request** window will appear.

Select a Cell Phone Number and/or Email to Send a Review Request

A request for an online review will be sent to this customer. Please select a cell phone number and/or email for the request.

Show My Contact Methods All Contact Methods

	Method	Type	Who	Contact Address	
<input type="checkbox"/>		WORK	Mike	568-4685	
<input type="checkbox"/>		NIGHTS	Mike	204-4595	
<input type="checkbox"/>		HOME	Mike	469-1418	
<input checked="" type="checkbox"/>		DAYS	Mike	869-3825	
<input type="checkbox"/>		WORK	Mike	zachary_mike@aol.com	

+ Phone + Email

3. Verify that the data is correct and/or select the desired contact method.
4. To add a phone number or email address, select the appropriate add (+) button. The new contact information will be saved to the customer record.
5. To change a phone number or email address, use the edit button. The changed contact information will be saved to the customer record.
6. If you do not want a request to go to the customer at all, select **Don't Send**.
7. Otherwise, select **Send**.
8. Continue with processing the receipt.



The Edge and Podium want to make sure your customers are not overburdened. If a customer has been sent a request from your store within 60 days, you will be notified that the customer has already been sent a request and should not be sent another. You can increase this number in System Options.



Podium will not offer to send a request when the transaction involves only a repair, custom job, appraisal intake. The request will be offered on pick-up.