Directions to Set-Up Auto Scheduler Program

1. Opening Up the Postcard "Schedule" Section in Your EDGE Software:

These numbers correspond to the numbers below.

① Click on the "Customer" tab located at top navigation bar,

② Then click "+ Postcards" tab located on the left side,

③ And finally click "Schedule" underneath the "Postcards" tab

④ Click "Add" button located in the bottom left corner

2. Selecting the Postcard Group

① Give the automatic job a name (examples: Birthday – Females, Birthday – Males, Anniversaries)

② Make sure the box is checked for: ☑ This automatic task is enabled.

③ Under "Postcard Options", click the "Filter by Group" drop down arrow on far-right side

④ Check the "Postcard Group" box you would like to choose from (i.e. example below shows "Birthday Women's Jumbo Postcards (5.5 x 11)"), **⑤** then hit OK in bottom right

3. Selecting Postcard Design

① **Click the far-right drop-down arrow to view all the Postcard Designs under the "Birthday Women's Jumbo Postcards (5.5 x 11)" group**

② **Highlight the postcard design that you would like to mail out, then click the OK button in the lower right corner**

③ **Notice that two small thumbnail images will appear at the bottom for the postcard design selected. You can click on these thumbnail images to see larger images of the front and back sides of your selected postcard**

Schedule Automatic Postcards

Automatic Schedule
This postcard will be sent automatically, depending on how you have set up your Windows scheduled tasks.
Please enter a note below to identify this automatic postcard job.

Birthday - Females

☑ This automatic task is enabled.

Postcard Options
Filter by Group: Birthday Women's Jumbo Postcards (5.5 x 11)
Postcard Design ①

ID	Name	PFC
BX1	Birthday Women's Jumbo Postcards (5.5 x 11) - Make a Wish - Name Spelled with Pieces of Chocolate Cake	1.09
BX2	Birthday Women's Jumbo Postcards (5.5 x 11) - Shine Bright - Name Spelled with String of Diamonds	1.09
BX3	Birthday Women's Jumbo Postcards (5.5 x 11) - Your Year to Sparkle - Name Spelled with Gold Glitter Letters	1.09
BX4	Birthday Women's Jumbo Postcards (5.5 x 11) - Dream Big - Name Spelled with Cupcake Candles	1.09
BX5	Birthday Women's Jumbo Postcards (5.5 x 11) - To Him, Regarding Her - Name Spelled with Birthday Balloons	1.09
BX6	Birthday Women's Jumbo Postcards (5.5 x 11) - Elegance Never Fades - Name Spelled with Sparkling Diamonds	1.09
BX8	Birthday Women's Jumbo Postcards (5.5 x 11) - Dream Big - Name Spelled with Diamond Letters	1.09
BX9	Birthday Women's Jumbo Postcards (5.5 x 11) - Time to Celebrate - Name Spelled with Diamonds	1.09
BX10	Birthday Women's Jumbo Postcards (5.5 x 11) - Smile & Shine Bright - Name Spelled with Diamond Letters	1.09
BX11	Birthday Women's Jumbo Postcards (5.5 x 11) - Birthdate Rocks - Birthdate Printed Above Large Diamond	1.09
BX12	Birthday Women's Jumbo Postcards (5.5 x 11) - Sparkle Dust - Name Spelled with Gold Letters	1.09
BX13	Birthday Women's Jumbo Postcards (5.5 x 11) - Birthday Cake with Sparkler - Name Spelled with Scripted Font	1.09
BX15	Birthday Women's Jumbo Postcards (5.5 x 11) - Sparkling Cupcakes	1.09
BX16	Birthday Women's Jumbo Postcards (5.5 x 11) - Better With Age - Names Spelled with Sparkling Letters	1.09
BX17	Birthday Women's Jumbo Postcards (5.5 x 11) - Birthstones For All Months	1.09
BX18	Birthday Women's Jumbo Postcards (5.5 x 11) - To Him, Regarding Her - Female Name Spelled with Icing on Cake	1.09
BX19	Birthday Women's Jumbo Postcards (5.5 x 11) - Colored Gemstones - Birthdate Numbers on Cake	1.09
BX20	Birthday Women's Jumbo Postcards (5.5 x 11) - Make a Little Wish - Name Spelled with Stars	1.09
BX21	Birthday Women's Jumbo Postcards (5.5 x 11) - You Should Get It!	1.09
BX22	Birthday Women's Jumbo Postcards (5.5 x 11) - You Are Like a Diamond	1.09
BX23	Birthday Women's Jumbo Postcards (5.5 x 11) - Resilient, Strong and Beautiful	1.09

Postage C...

Customer Criteria

Presets... | Supervi...

Add... | Enable / Disable

Help

③ Click on the thumbnails to see larger image.

OK | Cancel

4. **Entering a Promotional Offer and Disclaimer for your postcard and selecting Postage Class**
   1. Enter an "Offer" that will drive your customers to your store (180-character limit. When you can't type anymore, you've run out of space)
   2. Enter a "Disclaimer" (150-character limit. When you can't type anymore, you've run out of space)
   3. Click right side drop down menu arrow to select 4 Postage Class

Schedule Automatic Postcards

Automatic Schedule

This postcard will be sent automatically, depending on how you have set up your Windows scheduled tasks.

Please enter a note below to identify this automatic postcard job.

Birthday - Females

☑ This automatic task is enabled.

Postcard Options

Filter by Group | Birthday Women's Jumbo Postcards (5.5 x 11)

Postcard Design | BX2: Birthday Women's Jumbo Postcards (5.5 x 11) - Shine Bright - Name Spelled with String of Diamonds

1 * Offer | Bring in the card to receive $100 OFF your birthday purchase!

2 Disclaimer | Min. $500 purchase. Valid 30 days from birthday. See store for details.

HELP

Postage Class | Pre-Sort First Class (PFC)   3

4 Pre-Sort First Class (PFC)
Pre-Sort Standard (PSTD)

Customer Criteria

Presets...   Supervisor   OK   Cancel

5. Selecting the Customer Criteria that will determine who to mail your postcards to.

① Click the right-side drop-down arrow to select your Customer Criteria

② Click the "Results" tab at the top to confirm your presets are properly set to your targeted audience

③ Please note: Our program will automatically select the proper customer criteria for each postcard selected. So, if you select a Female Birthday Postcard, our system will automatically select Female Birthday Celebrants

Note: The "Results" presets will be determined by the postcard design you selected. For example, if you selected an "Anniversary Postcard" then your presets for many of the anniversary designs will show "**Couple**", "**Guess Gender**" and "**Include Only Customers With Spouse/Partner**"

It is highly recommended that you do not change these presets.

6. Setting up your Auto Send to pull data from your database week after week.

① **Click the "Dates" tab at the top**

② **Check the "Birthday" box underneath the "Occasion" drop down menu**

③ **Click on the "Occasion" drop down arrow**

Note: If you selected an "Anniversary" postcard design, you will need to check the "Anniversary" box here.

7. Selecting the range moving forward to pull data

① **Click the "Rolling Weeks…" button**

② **Enter "3" in the Min and Max and click ③ OK and ④ OK again and then ⑤ OK one final time**

| General | Results | Merchandise | Wishes | Dates | Other Keys | Amt Spent | Repair/Custom | Appraisal | Rewards/Referral | Postcards |

Occasion | All Dates

Min 6/12/2018

Max 7/12/2018

OK   Cancel

Note: If you selected an "Anniversary" postcard design, you will need to enter "4" as the Min and Max values here.

Today	Yesterday	All	Tomorrow		Rolling Days...
This Week	Last Week	7 Days	Next 7 Days	Next Week	Rolling Weeks... ①
This Month	Last Month	30 Days	Next 30 Days	Next Month	Rolling Months...
This Quarter	Last Quarter	90 Days	Next 90 Days	Next Quarter	Rolling Quarters...
This Year	Last Year	365 days	Next 365 Days	Next Year	Rolling Years...

A Date Was Entered   No Date Was Entered

Rolling Dates

Rolling Weeks

Min [3] ②

Max [3]

③ OK   Cancel

Presets...   Pick Now   ④ OK   Cancel

Customer Cr

Presets...   Supervisor   ⑤ OK   Cancel

8. Preview of Scheduled Postcard Jobs

1 Once your Auto Send postcard jobs are finished, they will appear in the "Schedule Postcard Jobs" table.

Note: If at any time you would like to disable your Auto Send Program, simply highlight the job above you would like to stop and click the "Enable/Disable" button here.

**Directions to Set-Up A Task Scheduler in Windows
to Run Your "Auto Send" Postcards**

1. **Access the Task Scheduler in Windows**
   - **(1)** **In the lower left corner of your computer, type the word "Schedule" in the search bar**
   - **(2)** **Click on the "Task Scheduler" program highlighted below**
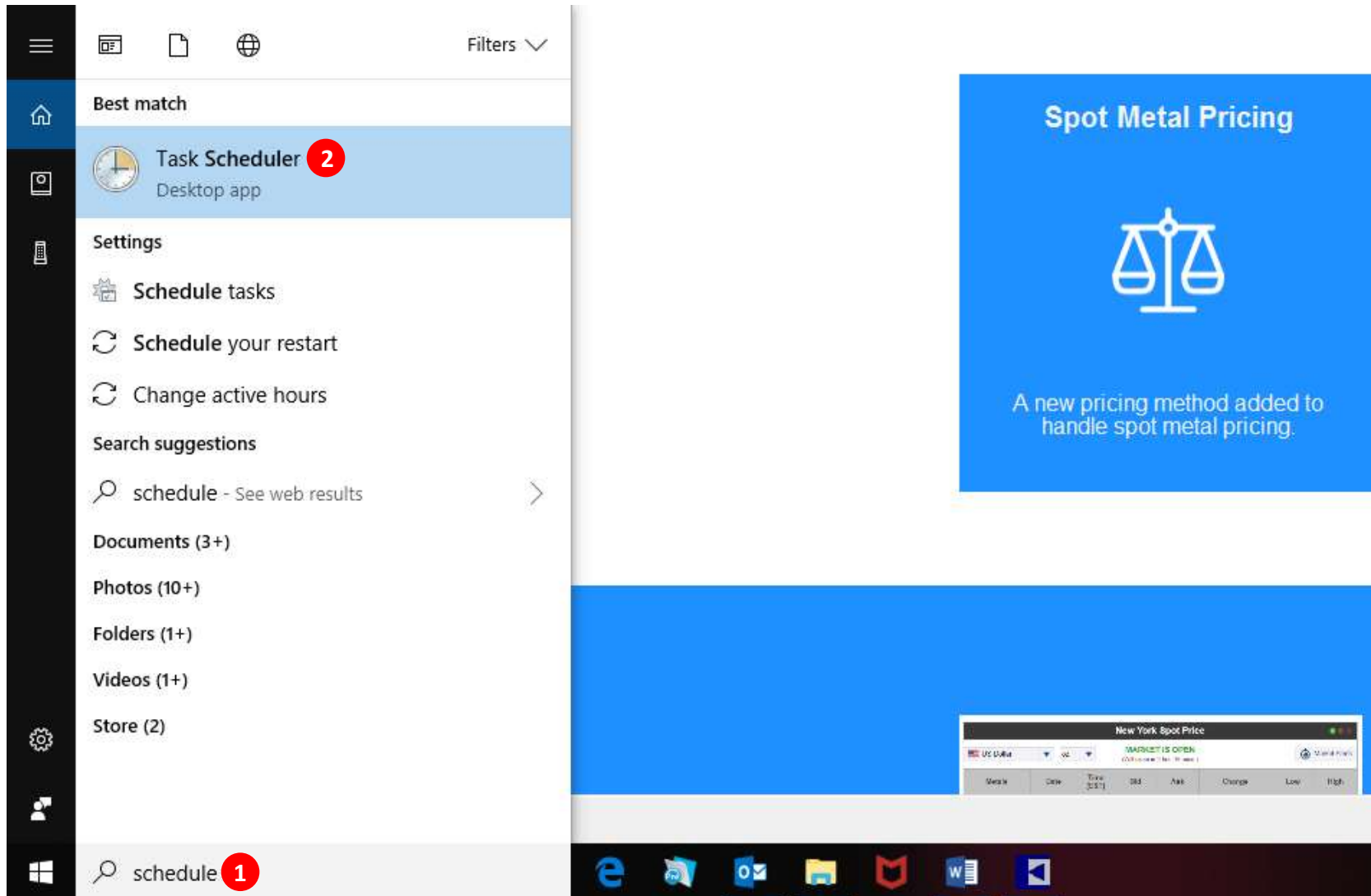
2. Creating a Basic Task

① On the left side, click on the "Task Scheduler Library" folder

② On the right-hand side under "Actions", click on "Create Basic Task…"
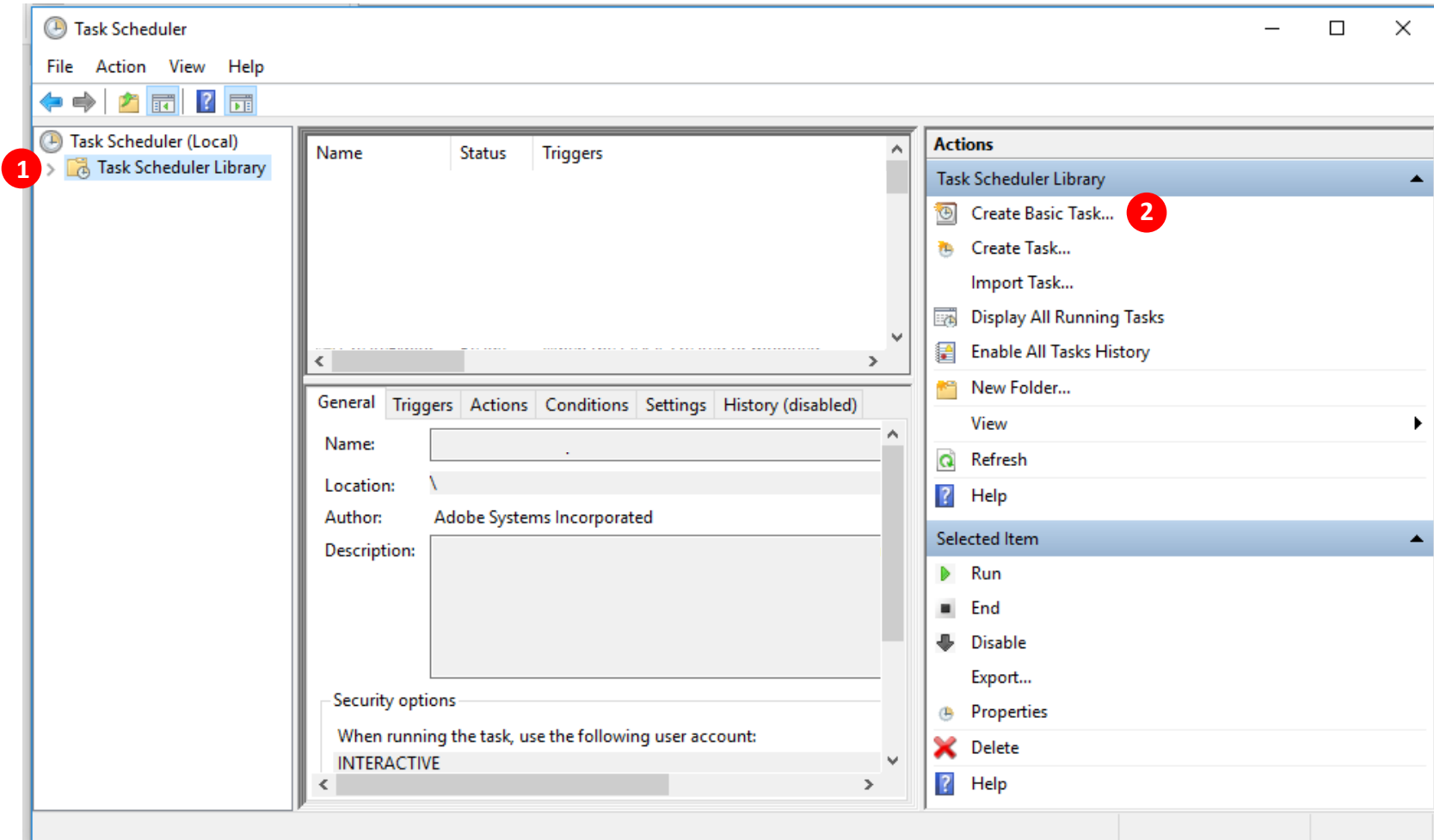
3. Naming and Describing Your Task

    ① Type "Automatic Postcards" in the "Name" area.

    ② Type the "Description" of your task

    ③ Click on the "Next" button
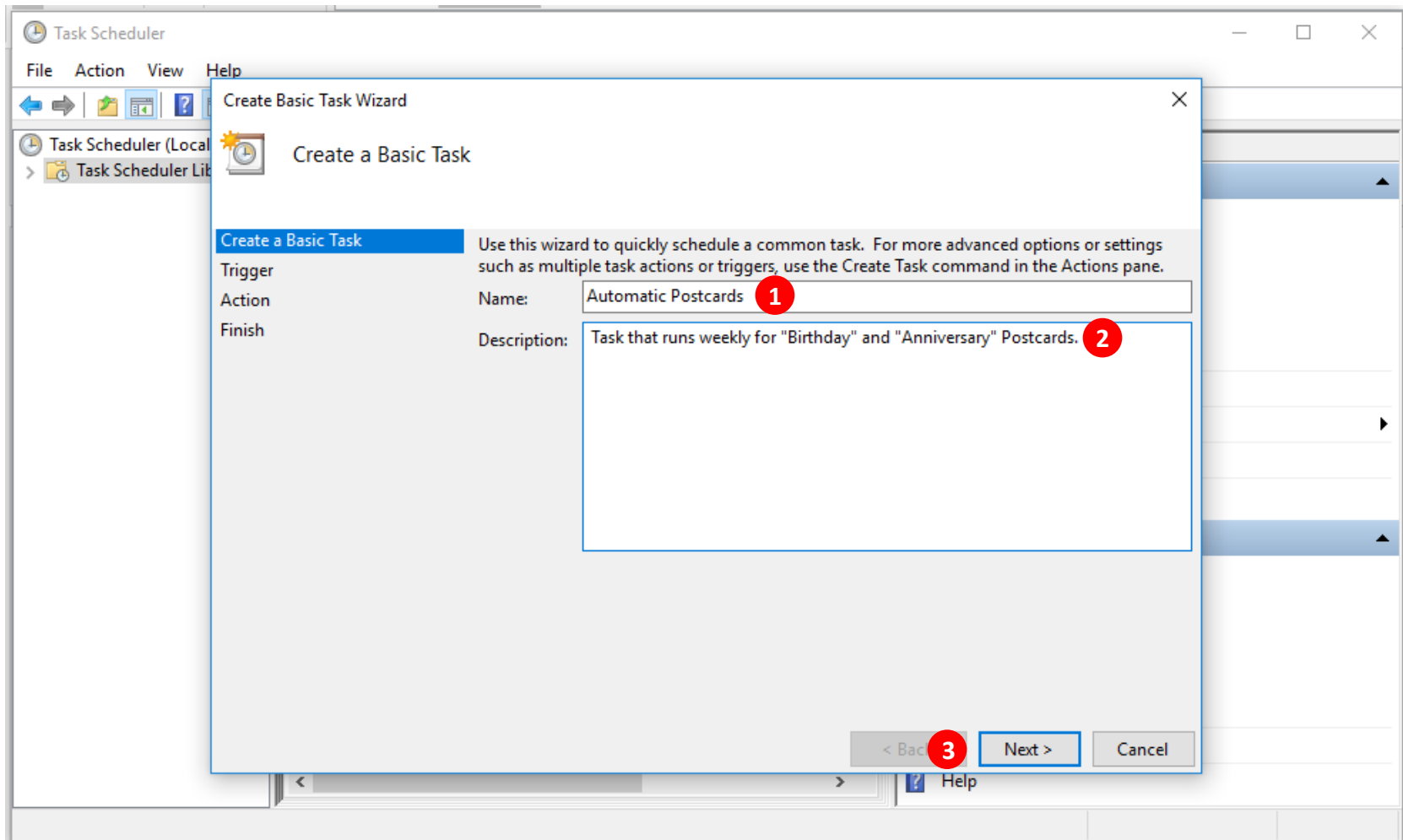
4. Setting Your Task Trigger

1. **Click on the "Weekly" button.**
2. **Click on the "Next" button**
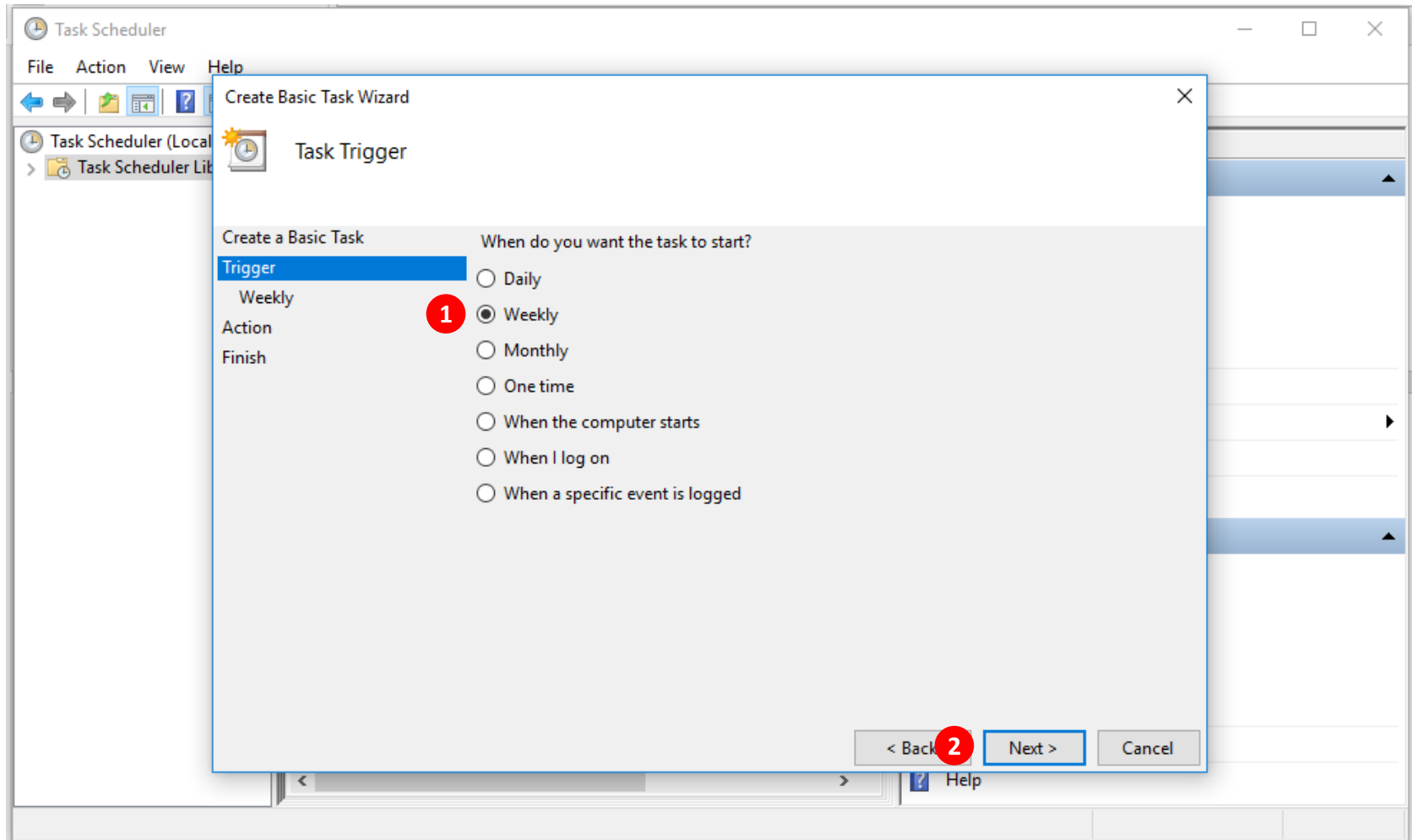
5. Scheduling the Date and Time of Your Task

① Click on the next "Thu" on the Calendar. In the example below, the next "Thur" will be "7/19/2018".

② Set the time to "11:00:00PM"

③ Make sure the "Recur every: 1 weeks on"

④ Check the box next to "Thursday"

⑤ Click on the "Next" button
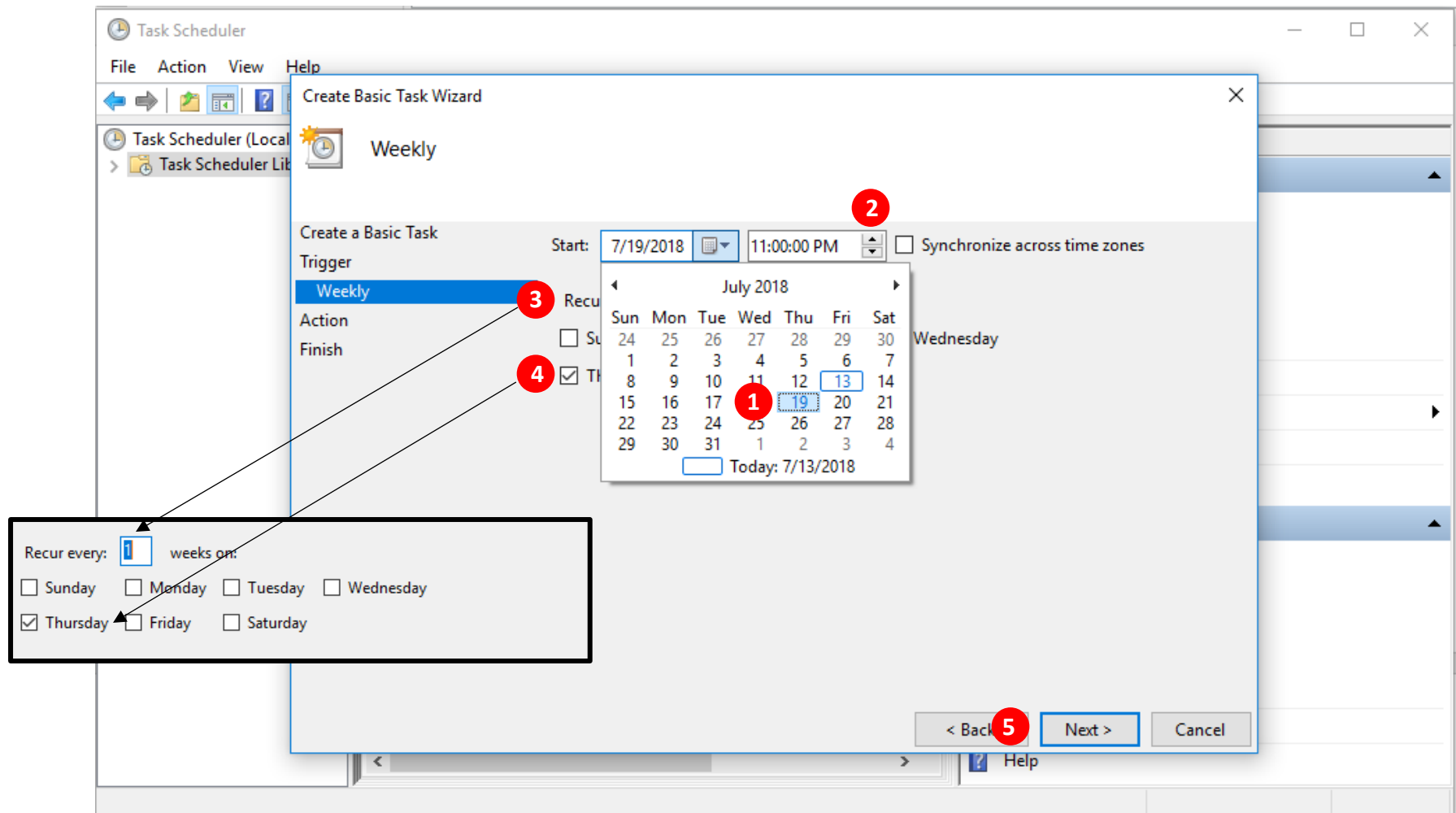
6. Scheduling the Task Action

1 Make sure the button "Start a program" is set

2 Click the "Next" button
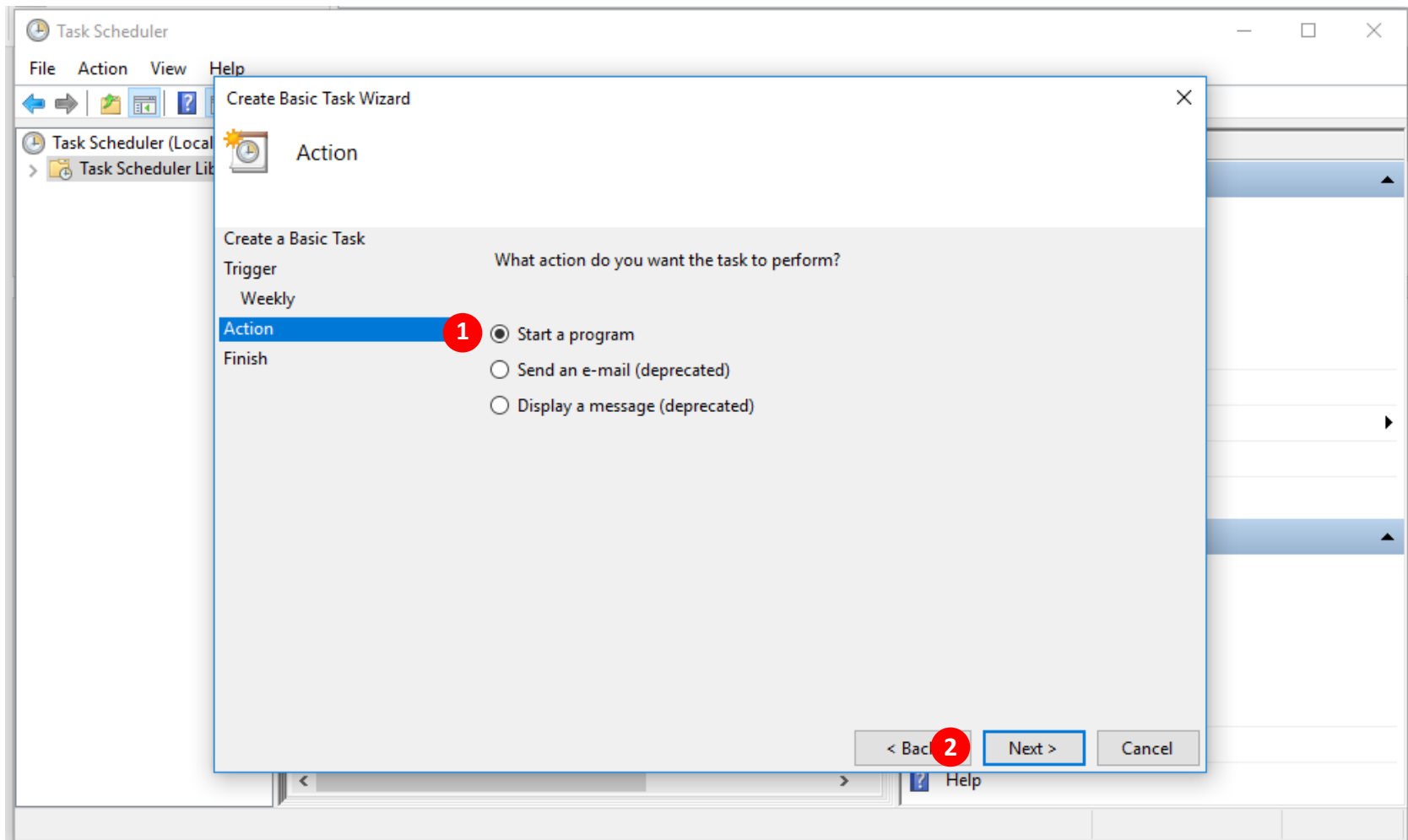
7. Starting a Program

① **Click on the "Browse…" button**
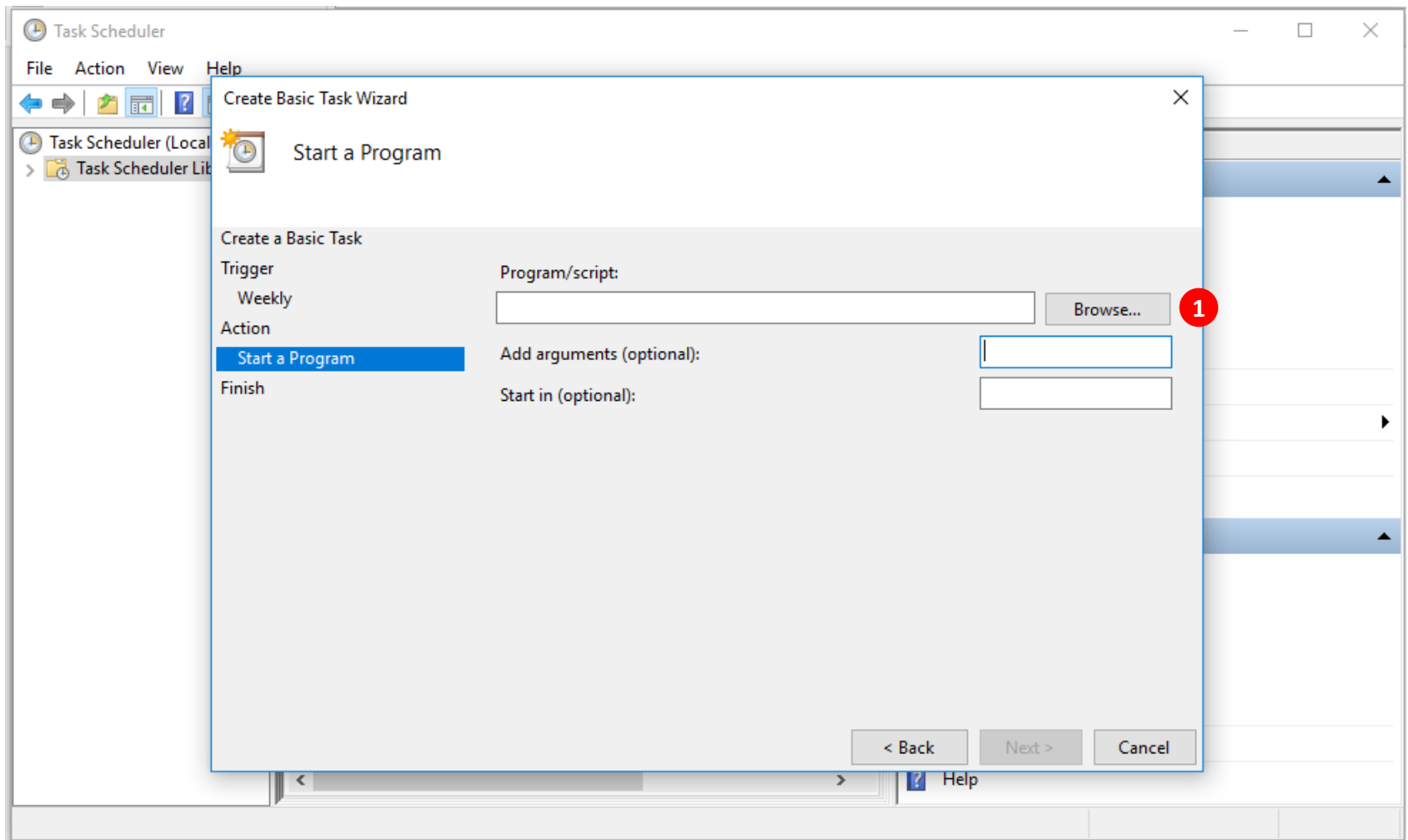
8. Opening Up Your Program Files
- **① Click on the "(C:)" Drive**
- **② Find and click on the "Program Files (x86)"**
- **③ Click on the "Open" button in lower right corner**
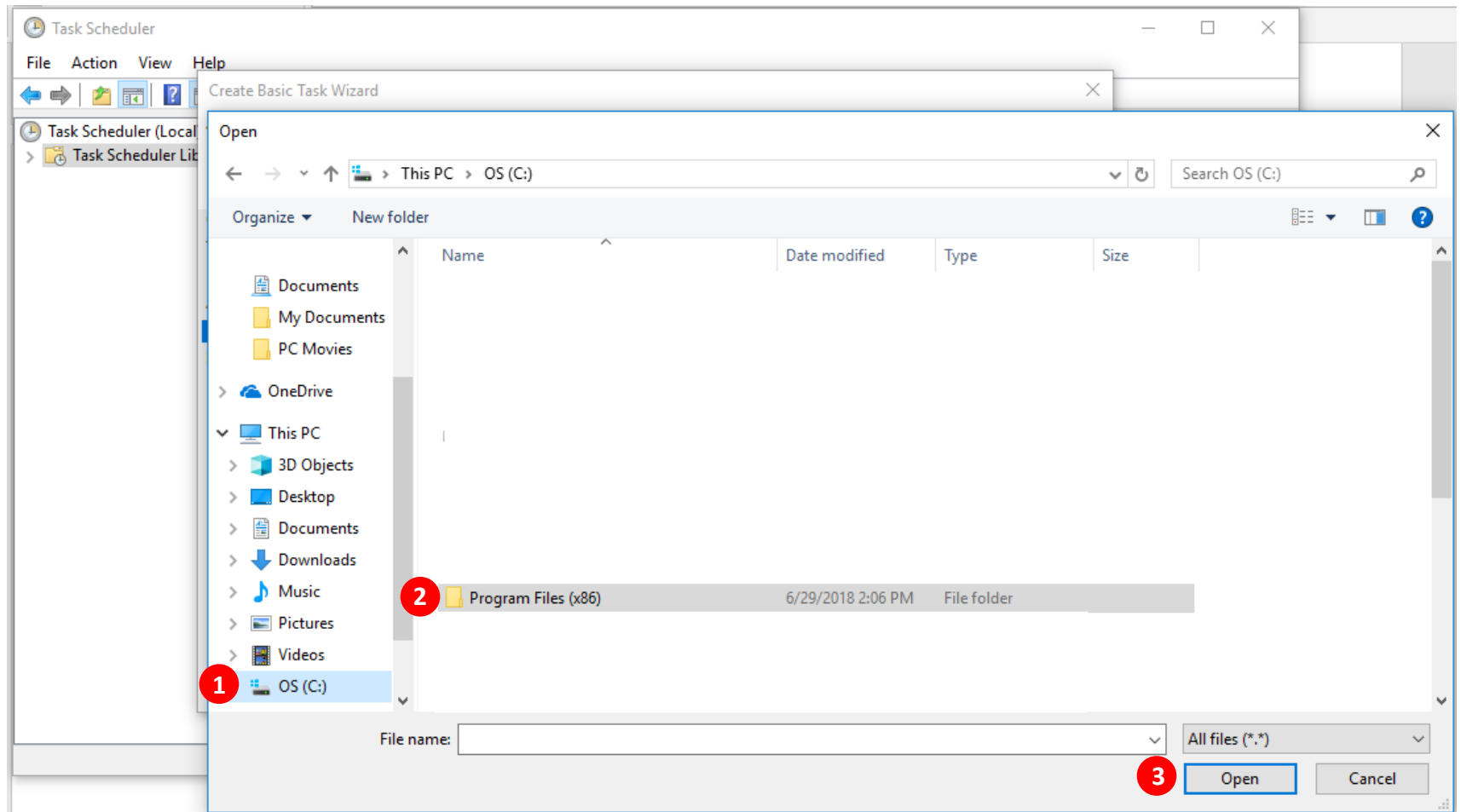
9. Opening Up Your "ajsllc" Folder Files

   ① **Find and click on the "ajsllc" folder**

   ② **Click on the "Open" button**
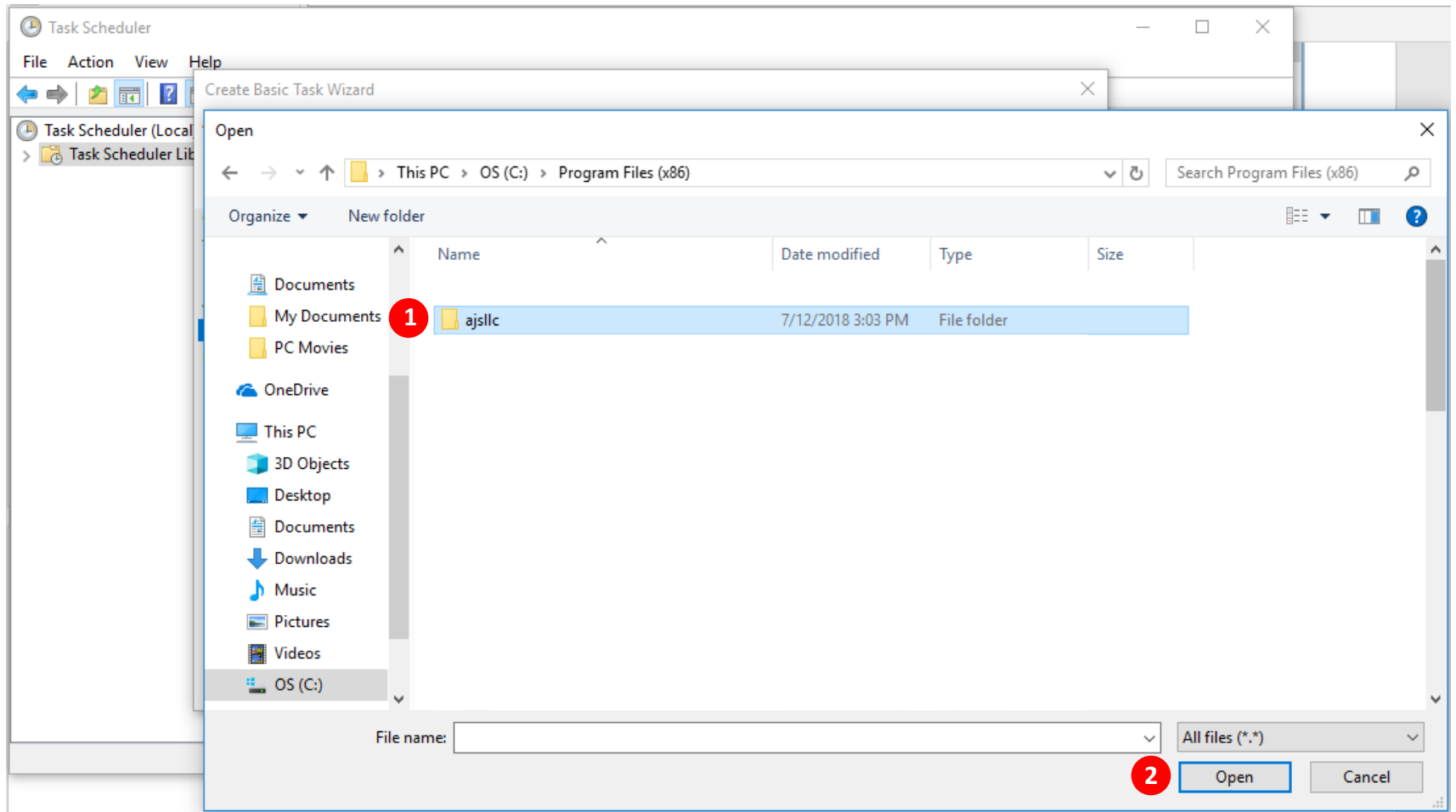
10. Opening Up Your "Edge" Folder Files

① **Find and click on the "Edge" folder**

② **Click on the "Open" button**
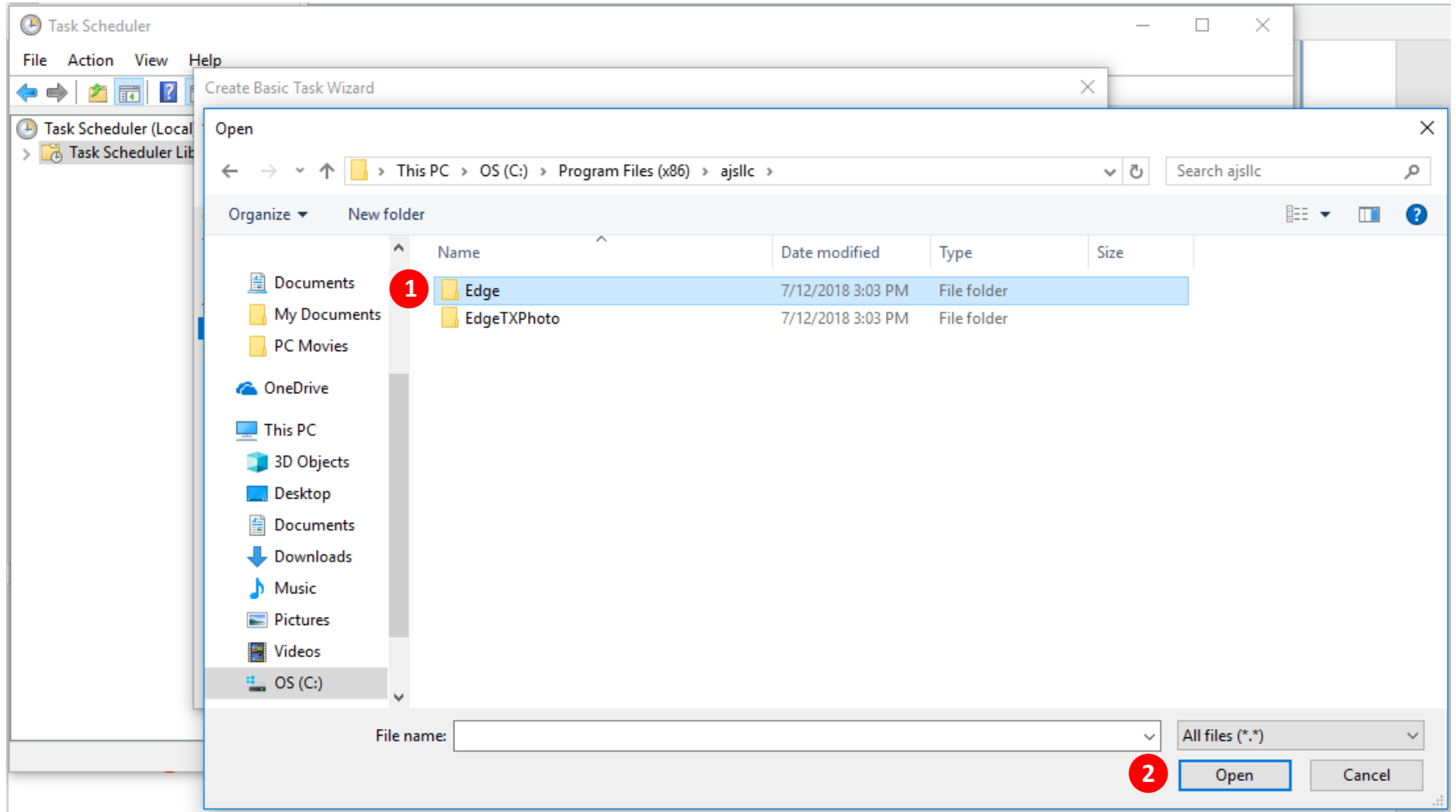
11. Selecting the "Edge" Program Execution File

① **Click on the "Edge" execution file (make sure you select the Edge.exe file or the Edge file that has a large size)**

② **Click on the "Open" button**

Note: Make sure you select the "Edge.exe" program file. This will always have the Edge Icon and may have the extension ".exe" after it. If the "Edge.exe" does not show, then look for the Edge file icon that has the largest file size as shown above.
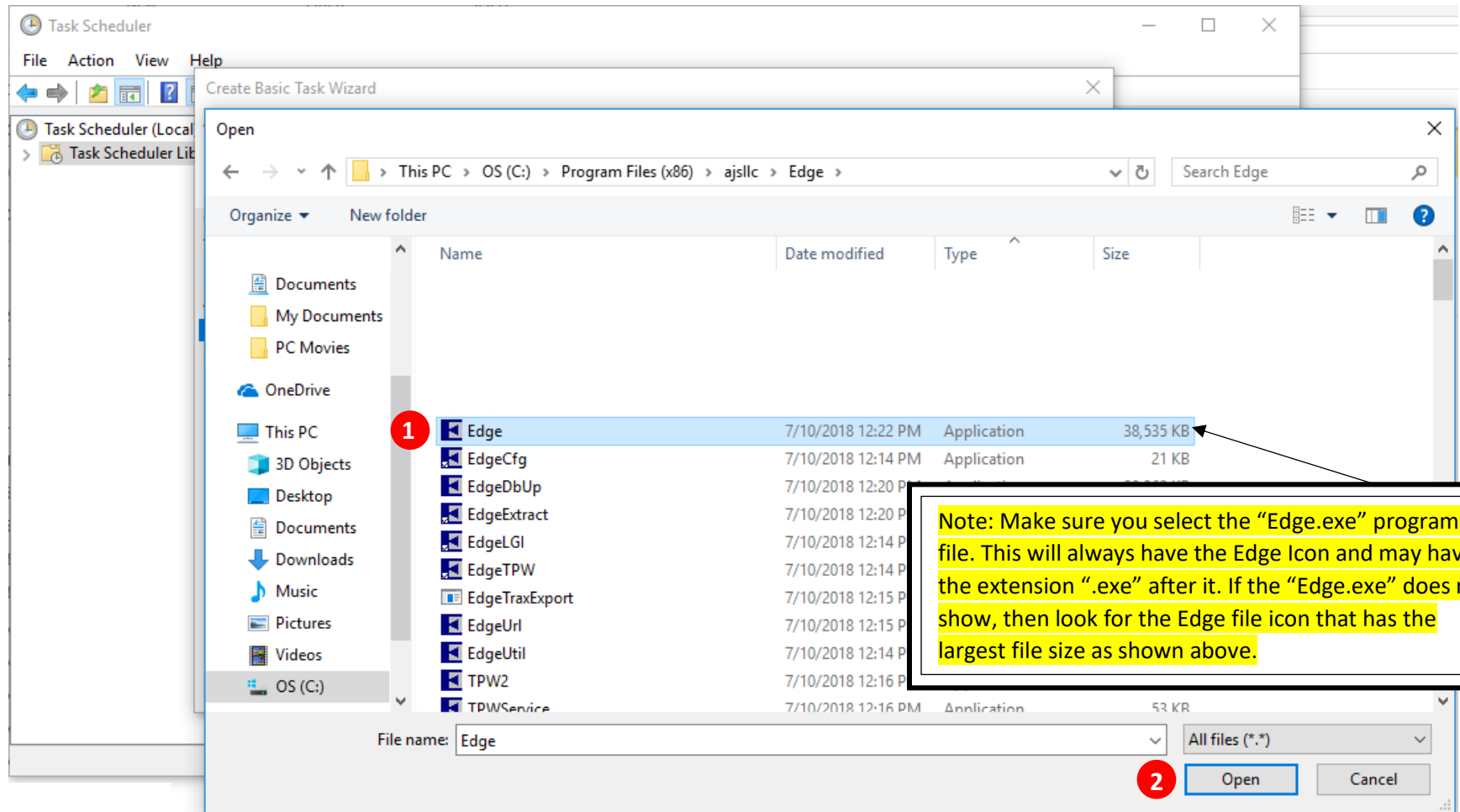
12. Adding an "Argument" to Your Task Program

① **Make sure that you selected the "Edge Execution Program File" by checking to see if the "exe." is showing**

② **Add an argument by typing "-postcard" (Make sure you type a hyphen or dash before the word "postcard")**

③ **Click on the "Next" button**

Note: Make sure the "Edge" program file you selected has the ".exe" file extension. If the ".exe" file extension is not showing, you selected the wrong file.

Make sure you type a hyphen or dash before the singular word "postcard".

Create Basic Task Wizard

Start a Program

Task Scheduler (Local
Task Scheduler Lib

Create a Basic Task
Trigger
   Weekly
Action
   Start a Program
Finish

Program/script:

"C:\Program Files (x86)\ajsllc\Edge\Edge.exe" **①**   Browse...

Add arguments (optional):   **②** -postcard

Start in (optional):

< Back   **③**   Next >   Cancel

Help

13. Finish the Task Program

① Check to make sure your task will run "Weekly, At 11:00 PM every Thursday of every week, starting with the next Thursday on the calendar

② Check to make sure the "Edge.exe" file is showing followed by "-postcard"

③ Check the box that reads "Open the Properties dialog for this task when I click Finish"

④ Click the "Finish" button
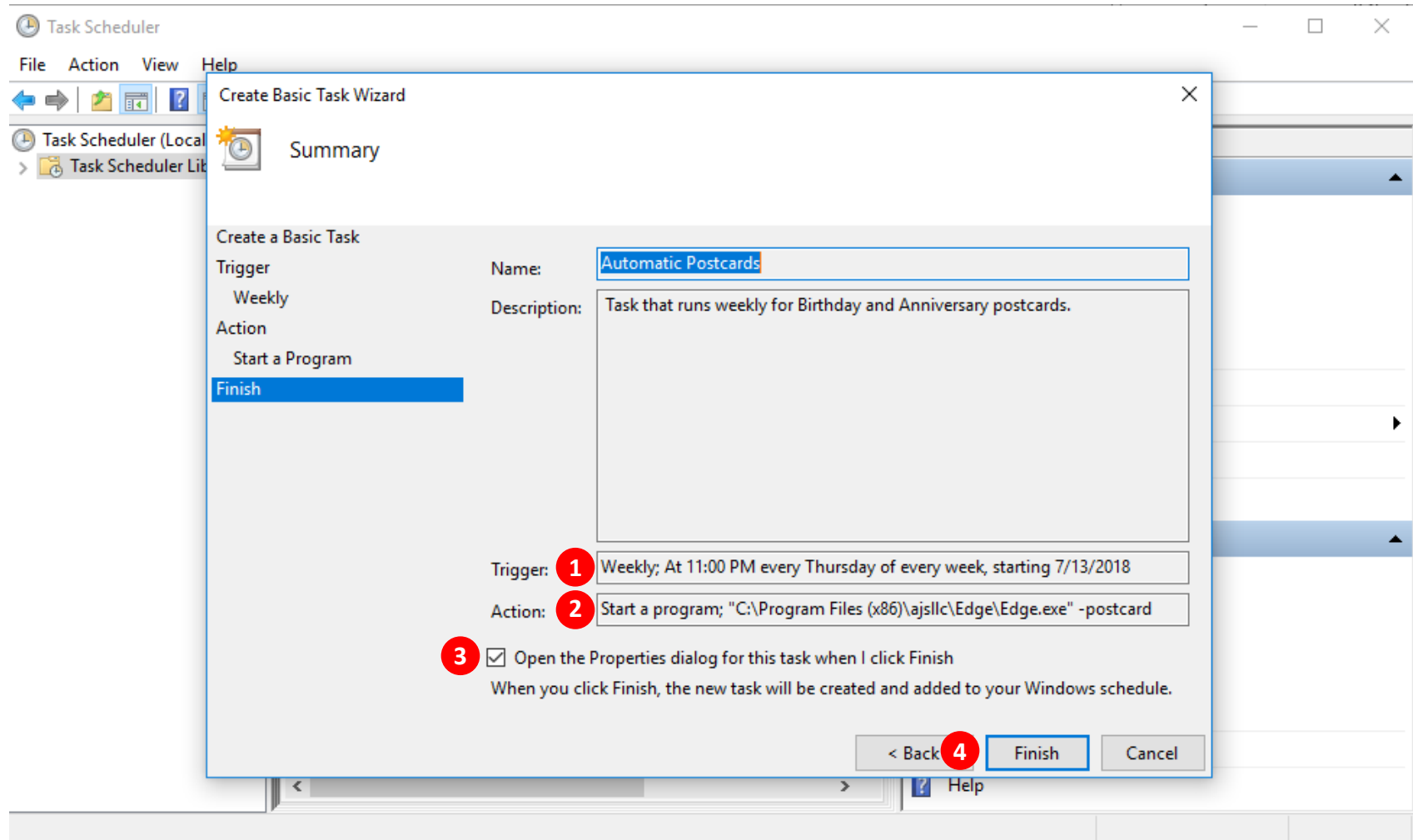
14. Setting Security Options
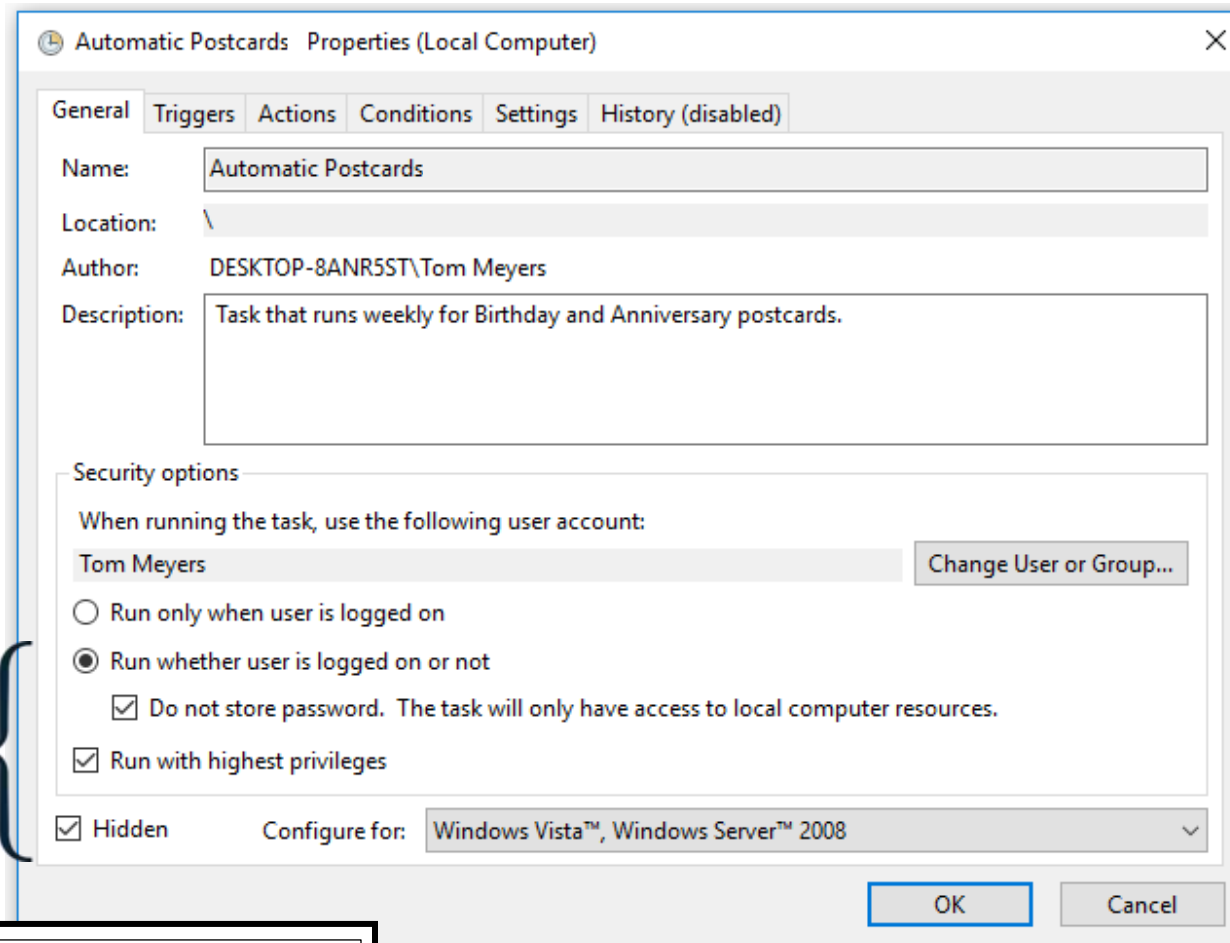
① **Under the "General" tab on the top, make sure you check the bottom four setting as shown below**

- **Do NOT click on the OK button just yet**

Automatic Postcards Properties (Local Computer) ✕

| General | Triggers | Actions | Conditions | Settings | History (disabled) |

Name: Automatic Postcards

Location: \

Author: DESKTOP-8ANR5ST\Tom Meyers

Description: Task that runs weekly for Birthday and Anniversary postcards.

Security options

When running the task, use the following user account:

Tom Meyers   Change User or Group...

○ Run only when user is logged on

◉ Run whether user is logged on or not

   ☑ Do not store password. The task will only have access to local computer resources.

① ☑ Run with highest privileges

☑ Hidden   Configure for: Windows Vista™, Windows Server™ 2008 ∨

OK   Cancel

Note: Make sure bottom four security settings are checked.

15. Setting Conditions Options

① **Click on the "Conditions" tab on the top**

② **Uncheck the "Start the task only if the computer is on AC power"**

③ **Check the box "Wake the computer to run this task"**

- **Do NOT click on the OK button just yet**

④ **Click on the "Settings" tab at the top**
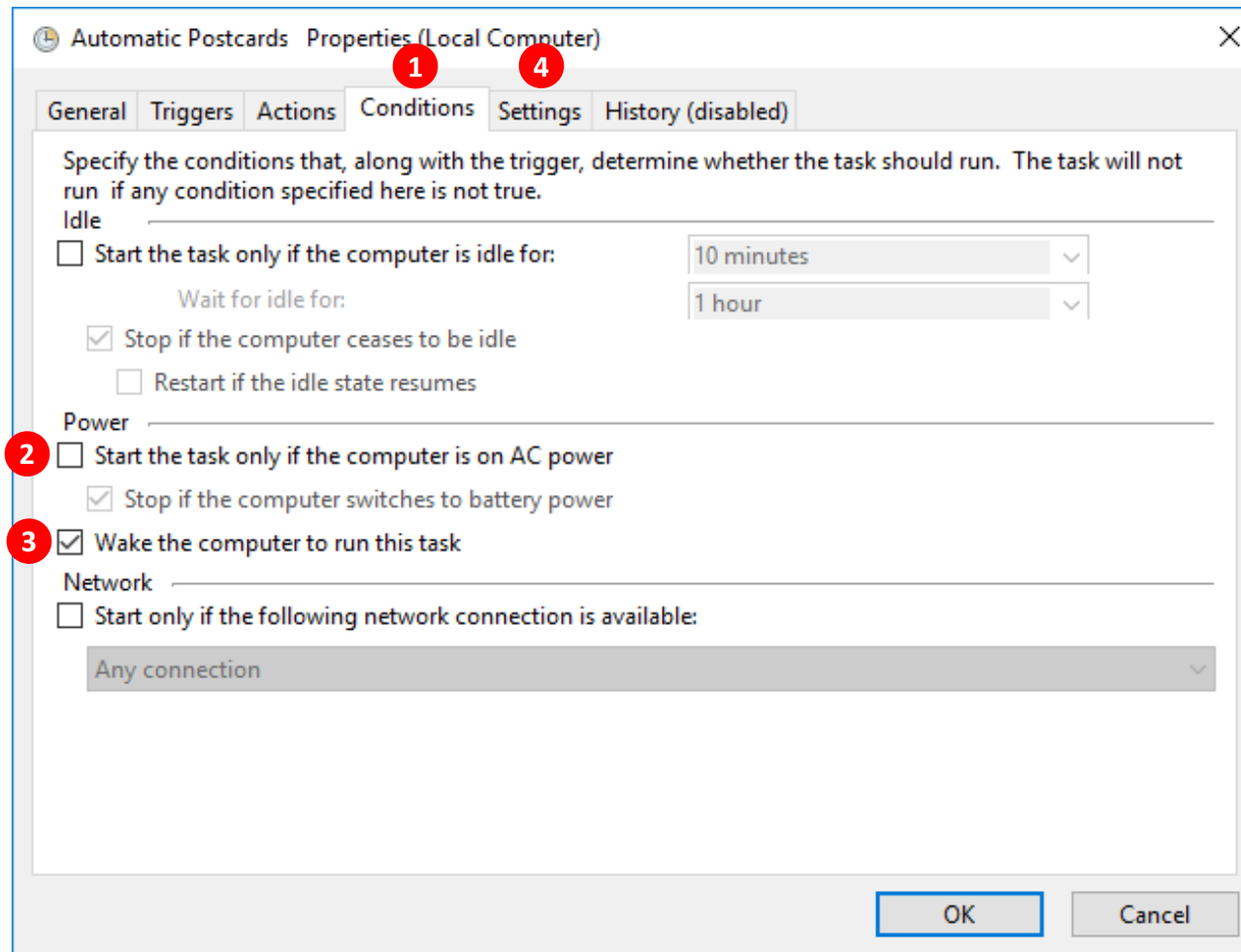
16. Finalizing Settings Options

① Uncheck the box that reads "**Stop the task if it runs longer than**"

② Uncheck the box the reads "**If the running task does not end when requested, force it to stop**"

③ Now click the OK button
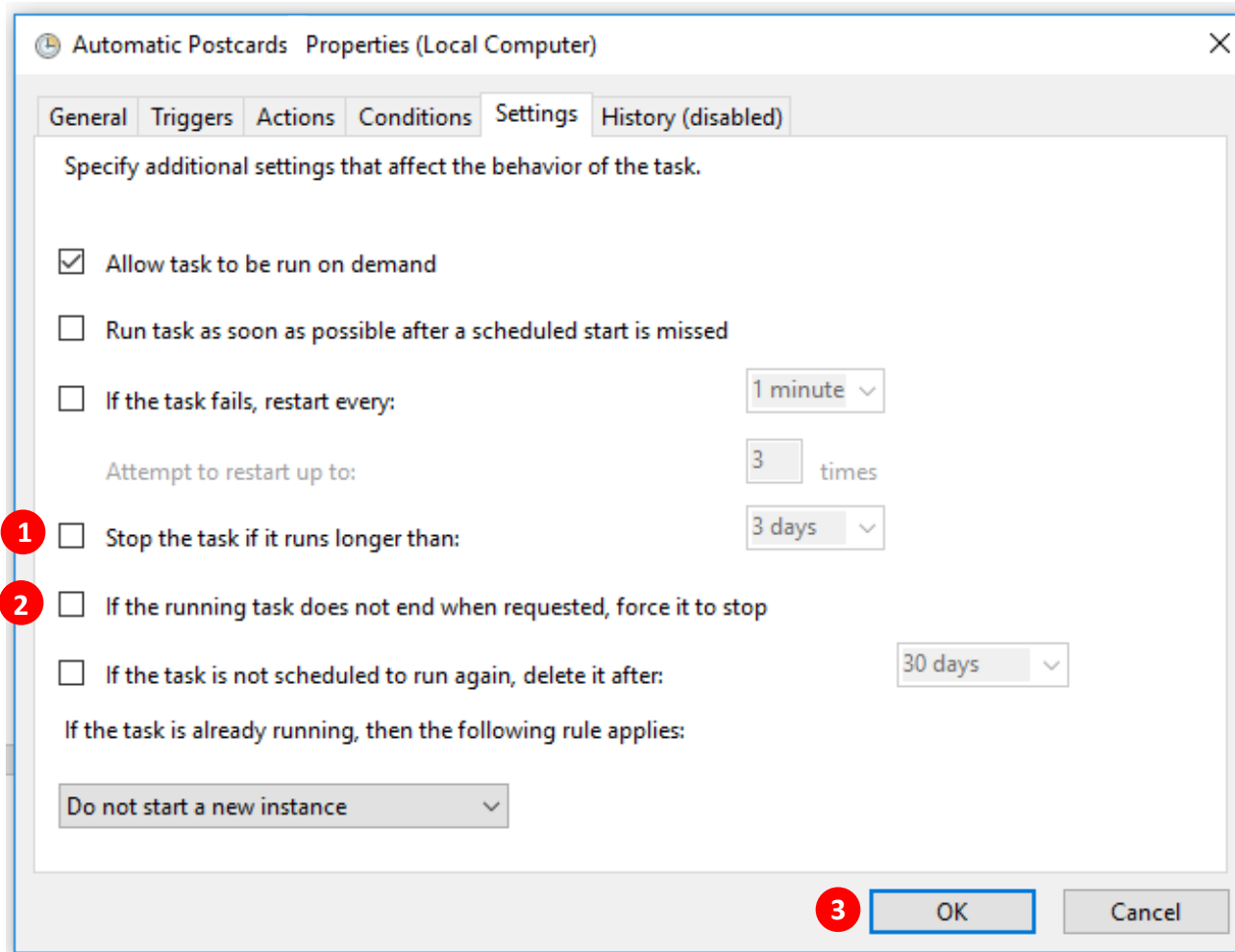
17. Confirming Your Task Scheduler is Set

    (1) Confirm that your "Automatic Postcards" task is showing and the status is "Ready"

    (2) You have now successfully scheduled a task and can close out the program by clicking on the "X" button in upper right-hand corner