# THE EDGE®

# Category Cleanup

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## Introduction

The Edge comes with default, recommended categories. Though there may be reasons to vary a bit, we strongly encourage that you use a category structure very similar to that provided with The Edge. It will provide best use of analytical tools and better organization of items. If you have not been doing this, we recommend the following approach to cleaning them up.

**Plan** the best categories. ► **Create** new categories as needed. ► **Move** items to the categories in which they belong. ► **Clean up** unneeded categories.
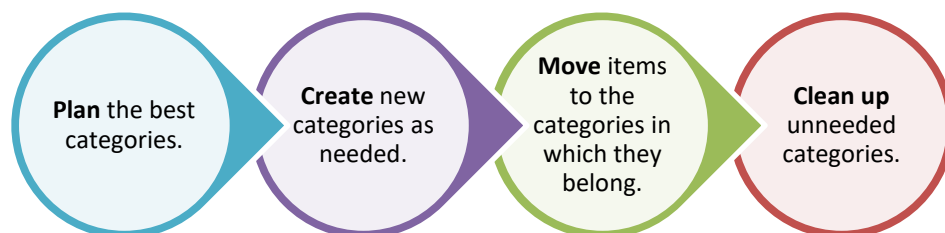
This document contains recommendations and instructions for implementing this approach.

## Plan

We recommend that you start by comparing your existing Edge category list (**Inventory ► Categories ► List**) with the default list shown later in this document in the section entitled Default Category List and review the differences. For example, you may find that you have categories that are nearly the same, just labeled differently. Or you may find that your categories have gotten too specific; for example, categories should not go to the vendor level.

Using the default list as your guide, make a list of what you want your categories to be, and therefore what categories should be created, what categories should be merged or moved, and what categories should be eliminated. Then proceed with creating new categories as needed.

## Create

To create a new category, use **Inventory ► Categories ►Add**. See The Edge User Guide or press F1 for help in using the Copy From feature and ensuring your category setup is correct.

After you have created your categories, you can begin looking at items to see how they should be categorized. To move all the items out of a category into another, see the section entitled Mass Move of Items.

# Move

In The Edge, you can mass move merchandise from one category to another.  This works for items of all pricing methods, types, and statuses.

Before you begin:

- Backup The Edge database.
- Plan the mass move of items carefully according to the category decisions made previously.
- Note that moving inventory items cannot be undone. You may choose to move a selection of items again, but the former item numbers are deleted and will never be re-used.
- Note that you must reprint the new tags for the items immediately after moving the items, so there is no trouble looking up the merchandise with the new item numbers.

To move items en masse:

1. Go to **Inventory ► Items ► Find**.
2. Specify the criteria necessary to find the selection of items to move into a particular category.  It might be as simple as filtering to the category you ultimately wish to remove.
3. On the **Type & Status** tab, check each of the types and statuses that should be moved.
4. Select **OK** to view see the results.

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**NOTE!**

**When filtering for items to move, be sure to include all types and status so no sold, layaway, etc. items are left behind.**

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5. From the resulting list, right click and select **Show Checkboxes**.
6. Check the items you want to move (if appropriate, select **Check All**).
7. Select **Supervisor ► Move Items to a New Category**.
8. Select the new category.
9. Select **OK**.  You will prompted to confirm.
10. Confirm the operation.  You will be reminded to retag the items.
11. Select **OK**.

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**NOTE!**

**Item numbers contain the category ID.  Old item numbers will be deleted and will never be reused.  Should you attempt to find an item by an old number, you will be prompted the item has been moved and redirected to the new item number.  New numbers will be assigned starting from the next available number in the destination category.**

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# Cleanup

After you have all items in the desired categories, you can disable unused categories.  To do so:

1. Before disabling a category, you must first move all the items out if it.  This includes all inventory types, even sold.  See the section entitled Mass Move of Items.
2. Verify that you have reprinted tags for items that were moved.
3. If you have not already done so, rename categories as needed to match the inventory within it as well as Edge recommended categories.

# Default Category List

| ID | Name | Type |
|---|---|---|
| 100 | Diamond Engagement Rings | RING |
| 110 | Diamond Wedding Bands - Women's | RING |
| 115 | Diamond Wedding Bands - Men's | RING |
| 120 | Diamond Anniversary Rings | RING |
| 130 | Diamond Fashion Rings – Women's | RING |
| 135 | Diamond Fashion Rings - Men's | RING |
| 140 | Diamond Semi-Mount Rings | RING |
| 145 | Diamond Wedding Set | RING |
| 150 | Diamond Earrings | EARRINGS |
| 160 | Diamond Pendants | PENDANT |
| 165 | Diamond Necklaces | NECKLACE |
| 170 | Diamond Bracelets | BRACELET |
| 180 | Diamond Pins and Brooches | PIN |
| 185 | Diamond Jewelry Miscellaneous | OTHER |
| 190 | Diamonds - Loose | LOOSE STONES |
| 200 | Colored Stone Rings - Women's | RING |
| 205 | Colored Stone Rings - Men's | RING |
| 210 | Colored Stone Earrings | EARRINGS |
| 230 | Colored Stone Pendants | PENDANT |
| 235 | Colored Stone Necklaces | NECKLACE |
| 240 | Colored Stone Bracelets | BRACELET |
| 250 | Colored Stone Pins and Brooches | PIN |
| 260 | Colored Stone Jewelry - Misc | OTHER |
| 270 | Colored Stones - Loose | LOOSE STONES |
| 300 | Pearl Rings | RING |
| 310 | Pearl Earrings | EARRINGS |
| 320 | Pearl Pendants | PENDANT |
| 325 | Pearl Necklace | NECKLACE |
| 330 | Pearl Bracelets | BRACELET |
| 335 | Pearl Pins & Brooches | PEARLS |
| 340 | Pearl Jewelry Misc. | PEARLS |
| 400 | Precious Metal (No Stones) Wedding Bands - Women's | RING |
| 405 | Precious Metal (No Stones) Wedding Bands - Men's | RING |
| 410 | Precious Metal (No Stones) Fashion Rings - Women's | RING |

| 415 | Precious Metal (No Stones) Fashion Rings - Men's | RING |
|-----|--------------------------------------------------|------|
| 420 | Precious Metal (No Stones) Remounts | RING |
| 425 | Precious Metal (No Stones) Earrings | EARRINGS |
| 430 | Precious Metal (No Stones) Chains | CHAIN |
| 431 | Precious Metal (No Stones) Necklaces | NECKLACE |
| 435 | Precious Metal (No Stones) Pendants/Charms | CHARM |
| 440 | Precious Metal (No Stones) Bracelets | BRACELET |
| 445 | Precious Metal (No Stones) Jewelry - Misc | OTHER |
| 450 | Precious Metal (No Stones) Pins | PIN |
| 500 | Watches - Luxury | WATCH |
| 505 | Watches - Dress | WATCH |
| 510 | Watch - Sport | WATCH |
| 515 | Watch - Chronograph | WATCH |
| 600 | Silver Chains | CHAIN |
| 610 | Silver Bracelets | BRACELET |
| 620 | Silver Rings Without Stones | RING |
| 640 | Silver Charms/Pendants | CHARM |
| 645 | Silver Earrings | EARRINGS |
| 647 | Silver Pins & Brooches | PIN |
| 650 | Silver Jewelry Misc. | OTHER |
| 700 | Giftware - Crystal | OTHER |
| 710 | Giftware - Porcelain | OTHER |
| 720 | Giftware - Collectibles | OTHER |
| 730 | Giftware Silver/Silver Plate/Pewter, Etc | OTHER |
| 900 | Bulk general merchandise UPC/SKU - Roses | BULK |
| 905 | Bulk general merchandise UPC/SKU - Batteries & Watch Parts | OTHER |
| 910 | Bulk Buy & Sell Item by measure UOM | BULK |
| 915 | Bulk Buy & Sell by Measure ONLY | BULK |
| 920 | Bulk Mixed retail pricing - Pre-Priced | BULK |
| 930 | Bulk - Beads | BULK |