

Departments

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Introduction

In addition to categories, The Edge allows you to create custom departments, an additional way to group items and services that is especially useful for reporting purposes. Departments can include not only inventory (by category), but also repairs, appraisals, custom jobs, and miscellaneous sale lines.

Department Setup

To work with departments:

- 1. Select Administrative ► Lists. This will open the List of Lists screen.
- 2. Open the **Department** list. The departments in the list will appear. These are departments that are available.

-					L	ist 'Departn	nent'.					
Lis	st Name	Departm	nent					Add Item	Delete Item	Edit Item	Move Up	Move Down
Short Value	Long Va	alue										
1	Diamon	d Engager	ment Rin	ngs								
2	Diamon	d Wedding	g Bands	3								
3	Diamon	d Fashion	Rings									
4	Diamon	d Rings Ot	ther									
5	Diamon	d Earrings										
6	Diamon	d Pendant	S									
7	Diamon	d Necklac	e									
8	Diamon	d Bracelet										
9	Diamon	d Loose										
10	Diamon	d Other										
11	Colored	Stone Rin	OS									
12		Stone Per	-									
13	Colored	Stone Bra	celets									
14	Colored	Stone Ear	minas									
15		Stone Ne										
16		Stone Loo										
17		Stone Oth										
18	0010100	rands / Ne		e								
19	Pearl Ba		Sonaco									
20	Pearl Ea											
21	Pearl Ri	-										
22	Pearl Pe	-										
22	Pearl Ot											
23			la Chana	na Waddi	ng Bands							
24		s Metal w/			-							
25		s Metal w/			-							
26 27		s Metal w/ s Metal w/										
27 28												
28 29		s Metal w/ s Metal w/		-								
29 30		s Metal w/ s Metal w/	-									
1000		o motor m		es Other								
31		s - Ladies										
32	Watche	s - Gents	2									
«< <		of 36	>	>>	Save &	Save &	Supervisor	Reve	. Sav	2	OK/Save	1000 10

To edit a department record, double-click the department record. The List Item screen will appear.

					List Item		
	Short	Value 1		Or	iginal ID 1		
	Long	Value Diamond	Engage	ment Rin	gs		
<	<	1 of 52	>	>>	Save & New	OK / Save & Close	Cancel

Fields in the **List Item** screen include:

Short Value An abbreviation or code for this department (e.g., 001, DIA, 1001).

Original ID The same as **Short Value**.

Long Value A description for this department.

3. Make changes in the List Item screen as needed and select OK/Save & Close.

For instructions on putting items in departments, see the section entitled Populating Departments.

TIP!

If you have no departments defined and where possible, The Edge will automatically create departments based on your category setup. Your System Options will be modified to ensure default departments are created.

Populating Departments

By Category

Inventory can be assigned to a department by category. Specifying a department in a category will override the default department system option assignment (if any).

To assign a category to a department:

- 1. Select **Inventory** ► **Categories** ► **List**. A list of categories will appear.
- 2. Double click or edit the category you want to assign.
- 3. From the **Department** drop-down menu on the **General** tab, select the department to which you want this category assigned. All items in the category will be assigned.

🖳 Categ	ory #100	_ • •				
General	Pricing					
		mond Engagement Rings				
	Department				•	
		Т	уре	RING	•	
	Generi	ic Descrip	otion	Engageme	ent Ring	

4. Select **OK/Save & Close** to save your changes.

By Repair SKU

Services such as repair tasks can be assigned to a department, but they must be predefined repair SKUs. Specifying a department on a service will override the default department system option assignment (if any).

To assign a service to a department:

- 1. Select Administrative ► Repair ► Repair SKUs.
- 2. Double click or edit the repair SKU you want to assign.
- 3. From the **Department** drop-down menu on the **General** tab, select the department to which you want this service assigned.
- 4. Select **OK/Save & Close**.

By Miscellaneous Sale Line

Miscellaneous sale lines can be assigned to a department. Specifying a departmentin a miscellaneous sale line will override the default department system option assignment (if any).

To assign a miscellaneous sale line to a department:

- 1. Select Administrative ► Misc Sale Lines.
- 2. Double click or edit the miscellaneous sale line you want to assign.
- 3. From the **Department** drop-down menu on the **General** tab, select the department to which you want this miscellaneous sale line assigned.
- 4. Select **OK/Save & Close**.

Department Defaults

Though not required, default departments can be setup for appraisals, custom jobs, inventory (categories), miscellaneous sale lines, and repairs. The default department will be used if one is not otherwise specified on the category, repair SKU, etc.

To setup default departments:

- 1. As described in the section entitled Department Setup, set up departments to act as the defaults for appraisals, customer jobs, inventory, miscellaneous items, and repairs.
- 2. Select Administrative ► System Options.
- 3. Scroll down to the **Department Defaults** section.

Ξ	Department Defaults									
	Default_Appraisal_Department	Appraisals								
	Default_Custom_Department									
	Default_Inventory_Department									
	Default_Misc_Item_Department									
	Default_Repair_Department									

- 4. Use the drop-down menus for each area to select a default department.
- 5. Select **OK** to save your changes.