Custom Job Items

Introduction

The Edge features the ability to create **Custom Items** for finished custom jobs. This is an optional feature that is **off** by default. When enabled, the **Custom Item** will be created automatically when the job is marked **Done**.

This allows you to:

- Use Join Item at POS to combine multiple items and pick ups into one piece.
- Attach Care Plans to custom job items.
- Offer Insurance Quotes on custom job items.

System Options

There is one system option for **Custom Items**.

Custom Item on Job DoneWhether to create a custom item when the job is marked Done. Options
include Automatically Create or Do not Create.



NOTE: This option is OFF by default and must be enabled to use this feature.

Setup

In order to create **Custom Job Items,** you must have at least one vendor setup with the **My Brand** box enabled. To do so:

- 1. Click Inventory > Vendors and Find or Add a vendor record.
- 2. Check the My Brand box.

🖳 Vendor MY My Brand	
Contact Pricing Notes	
General ID MY Inactive My Brand Master ID Address Address 2	Orders Our Account #



NOTE: You will not be able to create **Custom Job Items** unless you have a vendor setup with the **My Brand** box enabled.

Creating Custom Job Items

To create a **Custom Job Item**:

1. Complete the Custom Job Intake at POS.

Associate		ner. Tom (1)	Share	e Why In Email - Anniversary						~	Park
Customer	#001-17914						Make		Sell Gift	Special	Reair	
Dominick Mastri 1 Main St Seymour, CT 06483 (203) 400-6500		tri		nick Mastri Find Notes / Contact Payment Sell Item		Certificate	Order	Re all In the	Start Ov			
		New Cus		Wish List	Appts	Pick Up / Finish	Misc Charge	Sell / Activate Card	Appraisal Intake	Custom Job Intake	Open Drawer	
dominic 0	k@ajsllc 0 2		08/2020	No Name	Ship		Cancel Order	Trade / Buy	Return / Adjust	No Sale Tracking	8/27/2020 9:23 AM	Receipt
ine	Item #	QTY				Descri	iption			Reta Disc %		Price ax/Net
1 Cus	tom		Custom	necklace. T	asks:Make	the neckla	ce.			A Env.	1	\$1,445.00
												\$97.53
												\$1,542.53
										✓ De	posit	\$250.00
Cash	Gift Cert	Store	Tender A	mount								
cusii	One cent	Credit	CASH S	250.00					Done		b Total	\$250.00
Check	Gitt/ Reward	In Store								Sales	Tax 🖂	\$0.00
Chicon	Card	Charge									Total	\$250.00
									Save to	Ter	ndered	\$250.00
Credit	Layaway	Del Line							Wish Lis	at	Due	\$0.00

- 2. Complete the job and mark it **Done**. There are 4 ways to do this from the main Edge menu:
 - i. Click **Services > Done** and enter/scan the job envelope or all the individual tasks.
 - ii. Click **Services > Find > Job**, enter criteria to find the job, and fill in the **Done** date.
 - iii. Click **Services > Find > Job**, enter criteria to find the job, and mark all tasks completed.
 - iv. Click Services > Move Envelope and move the job to a location that has the 'Moving a Job to this location marks it as done' box checked.
- 3. The **Create Custom Item** window will automatically appear.

Create a Custom Item							
Create a custom item from the custom job.							
Vendor My Brand	Custom necklace (Custom Job: 001-131351-001)	6					
Category 165 Diamond Necklaces		E E E					
Style Code 001-131351-001							
	Declare	d Value \$1,445.00					
		Save Item					

- 4. Select the **Vendor** and **Category** for the item. Optionally, update the **Description**, **Image**, and **Declared Value**.
- 5. Click Save Item.



NOTE: The default **Declared Value** will be the sum of all tasks on the job. Changing it on the item record will **not** change any values on the original job. The value from the item record is used for **Care Plan**, **Insurance**, **Appraisal**, and **Repair** purposes.

Editing Custom Items

Items created from custom jobs can be found and edited like other items. You will see **Custom** as an option on the inventory filter **Type & Status** tab.

ind Items						
eneral Type & Status	Item Details	Stones	Scan Data	Website	Options	
Pricing Methods Item Pricing UPC/SKU Item By UOM UOM Only Pre-Marked Spot Metal	Inventory Inventory Inventory Inventory Memo Trade Specia Assem Take-C Built V Custor Joined Templ: Catalo	al Order al Order abled Dff		Status n Stock Dn Layawa Sold Memo Out RTVendor Missing Disassemb Consumed Consumed Scrapped Sive-Away Donation	led Here Gone	Check All None PO Status Queued Entered On Order Canceled

Additionally, the **Custom Job** will retain a link to the item at the bottom.

6	Notify	¥		9/3/2020 💌 ETA Is Estimated
	Text (203) 400-6500		Done	8/27/2020 9:32:47 / 🗸
			Picked Up	
			Canceled	_
			Location:	
		Cus	tom Item #	001-165-1000001 🕞
< < 1 of 1 >	>> Supervisor Save & Add Task See Item	Revert	Save & Stay	OK / Save & Close Cancel

Custom Items can be edited, but there are some restrictions:

- Vendor Style cannot be changed. This will always be the Custom Job number.
- Cost cannot be changed. This is derived from the Custom Job.
- Stock Type cannot be changed and must remain Custom.
- The **Pricing Method** cannot be changed.

Custom Items at POS

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When picking up a **Custom Job** that has a **Custom Item** linked to it, the item will automatically appear.

Line	Item #	QTY	Description		Retail Disc %/\$	Price Tax/Net
1	001-131351-001]	Pick Up Custom Job #001-131351-001 ordered on 8/27/2020: Custom necklace. Tasks:Make the necklace.	^		\$1,445.00
						\$97.53
						\$1,542.53
				~	On Acct	\$250.00
2	001-165-1000001 More]	Custom necklace (Custom Job: 001-131351-001)			
			☐ Include Care Plan 3 Year Jewelry Care Protection Plan for \$114.99	~		\$114.99

From here it is possible to attach a Care Plan or Insurance Quote.

Additionally, the **Custom Item** will be available when using the **Join Item** feature to combine multiple items into one piece.

Create a Joined Item						
Join multiple iten	ns together to create	a joined iten	n.			
001-190-00612	Loose Diamond 0.56Ct	Round Treated	Light Blue Si1 Diamond		\$1,345.00	⊗
001-165-1000001	1351-001)	\$1,445.00		8		
Vendor My Bra Category 165	nd	Description Suggest	Custom necklace (Custom Job: 001-131351-001) Loose Diamond 0.56Ct Round Treated Light Blue Si1 Diamond			
Add Items From POS					Price \$2,790	0.00 Cancel

See the Join Item document and video for more information on using this feature.

Custom Item Reporting

Custom Items can be included on reports.

Category 165: Diamond Necklaces								
Store #1								
	MY:001-131351-001 001-165-1000001	Custom Custom necklace (Custom Jol Sold	b: 001-131351-001)	0	0.00			
		Store #1	1	0	0.00			
		Category 165: Diamond Necklaces	1	0	0.00			



NOTE: Sold **Custom Items** will appear as \$0 on reports. These figures are included in **Service** reports and do not impact **Inventory** report figures as this would lead to duplication when comparing reports.