

What's New in 2024 – Reports

Introduction

A series of exciting new reports and updates to existing reports have been made beginning with **Edge version 24.1** designed to make managing your business easier than ever with new options for grouping/sorting, additional hyperlinks making existing reports more interactive, improvements to exporting, and more.

New Reports

Vendor Style Analysis

This brand-new report gives you a **performance snapshot** of **Inventory by Vendor** and **Vendor Style #**. It includes key statistics to help you quickly determine how a particular style is performing. Like most reports, this report is **interactive**; clicking on different areas will reveal the underlying **Item Records**.

To run the report:

- Click **Reports > Analytics > Inventory Performance > Vendor Style Analysis**.

Vendor Style Analysis Report

Vendor ID / Style	Store	Sold	ADTS	In Stock	ADOH	Avg. Cost	Avg. Retail	Margin	Turn	Description
TOG / Charm-14k	All	4	546	56	1031	\$60.00	\$5.00	0.60	0.57	14k Gold Coin Charm
TOG / DiaRing2	All	0		1	355	\$822.00	\$2,500.00	0.00	0.00	Lady's White 18 Karat Tension Set Engagement
TOG / Ear-Pearl-2	All	1	973	1	252	\$400.00	\$1,000.00	0.60	0.50	Lady's White Satin Platinum Drop Earrings With 2=
TOG / Earring5	All	1	889	0		\$250.00	\$750.00	0.67	1.00	Lady's Platinum Button Earrings With 2= Oval
TOG / FancyEarring-1	All	2	99	13	265	\$8,500.00	\$21,250.00	0.60	0.20	Lady's White 18 Karat Satin Large Hoop Earrings
TOG / Invoice1	All	1	313	0		\$500.00	\$1,250.00	0.60	1.16	Lady's Diamond Engagement Rings 100 TOG
TOG / Multi_test1	All	1	1	0		\$250.00	\$500.00	0.50	182.50	A fancy ring
TOG / Neck-Pearl-3	All	3	316	0		\$325.00	\$750.00	0.57	1.15	Lady's Single Strand With Cultured Cream Excellent
TOG / Newitem2	All	0		0		\$500.00	\$0.00	0.00	0.00	Lady's Diamond Engagement Rings 100 TOG
TOG / newitem5	All	2	206	0		\$500.00	\$1,250.00	0.60	1.76	Lady's Diamond Engagement Rings 100 TOG

Fields on this report include:

Vendor ID/Style Vendor's ID and Style #

Store For multi-store users, a performance breakdown by store #.
Please note: When generating this report, the '**By Store/Company**' drop-down on the **General** tab controls whether to breakdown performance by **individual store** or **combine** them

Sold The total number sold

ADTS Average Days to Sell

In Stock The total # in stock

ADOH Average Days On Hand

Avg Cost Average cost of all items of this style

Avg Retail Average retail of all items of this style

Margin Profit margin for Sold items

Turn Inventory turn

Consumed in Jobs

This report will show items that were consumed in **Repairs, Custom Jobs, Builds, and/or Assemblies**. It can be grouped by **job type** and will show all consumed items along with **links** to the **Job** or **Item** they were consumed into.

To run the report:

- Click **Reports > Inventory > Consumed in Jobs**.

Consumed In Jobs Report						3/18/2024
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Item #	Status	Description	Store	Consumed Into		
Type	Service Consumed Into	Date Consumed	Cost	Cost	Price	
Job Type: Assembled						
001-100-1000069	Consumed Here	Lady's Diamond Engagement	1	001-100-1000108		
Stock	Assembled	12/11/2023	3,200.00	8,000.00		
001-100-2000003	Consumed Gone	Lady's White Polished 18 Karat	1	001-210-1000005		
Stock	Assembled	4/12/2023	1,000.00	1,500.00		
001-200-1000002	Consumed Gone	Lady's Titanium Free Form	1	001-210-1000005		
Stock	Assembled	4/12/2023	400.00	1,200.00		
Job Type: Built						
001-120-1000001	Consumed Here	Lady's White 14 Karat Full	1	001-200-1000052		
Stock	Built	3/12/2024	2,000.00	5,000.00		
001-210-1000191	Consumed Here	Lady's Yellow Matte 18 Karat	1	001-200-1000052		
Stock	Built	3/12/2024	900.00	2,100.00		
Job Type: Custom						
001-100-1000068	Consumed Gone	Lady's Diamond Engagement	1	001-00096-001		
Stock	Custom	5/31/2023	500.00	1,250.00		
001-190-1000001	Consumed Gone	Loose Stones Shape: Emerald	1	001-00323-001		
Stock	Custom	2/26/2024	500.00	1,250.00		
001-200-1000008	Consumed Gone	Lady's Titanium Free Form	1	001-00100-001		
Stock	Custom	5/31/2023	400.00	1,200.00		
001-240-1000003	Consumed Gone	Gaze up on this Open Link	1	001-00218-001		
Stock	Custom	7/3/2023	200.00	600.01		
001-430-1000003	Consumed Gone	Yellow 18 Karat Rope Chain	1	001-00323-001		
Stock	Custom	2/26/2024	100.00	300.00		

Fields on this report include:

Item # The Item's number

Type The type of inventory, i.e. Stock, Consignment, Memo, etc.

Status Consumed Here or Consumed Gone. Items used in Repairs or Custom Jobs are immediately marked Consumed Gone, even if the job is not yet picked up. Items used in Assembly or Build items are Consumed Here until the Assembled or Built item is sold

Service Consumed Into What job type used this item

Description	Item Description
Date Consumed	Date it was consumed
Store	For multi-store users, what store it was consumed at
Consumed Into	Link to the Item # or Job # where this item was consumed
Cost / Price	The Cost and Price of the consumed part

Pricing

This report provides an additional tab, Pricing, where you can select which pricing data to include: Retail, Current, Sale, Lowest, Cost, and/or Re-Cost.

To run the report:

- Click Reports > Inventory > Pricing.

Pricing Report

Vendor Style #	Type	Description	Count	Age	Margin	Cost	Re-Cost
Item #	Status	Retail	Current	Sale	Lowest		
AND-SPO-Test1 001-100-1000124	Stock In Stock	Lady's Diamond Engagement	3,500.00	1	60	2,250.00	1,250.00
AND-test123456 001-100-1000153	Stock In Stock	Lady's Engagement Ring With	8,000.00	1	5	5,760.00	3,200.00
TOG-FancyEarring-1 001-150-1000001	Stock In Stock	Lady's White 18 Karat Satin Large	21,250.00	1	264	15,300.00	8,500.00
TOG-FancyEarring-1 001-150-1000008	Stock In Stock	Lady's White 18 Karat Satin Large	21,250.00	1	264	15,300.00	8,500.00
TOG-FancyEarring-1 001-150-1000009	Stock In Stock	Lady's White 18 Karat Satin Large	21,250.00	1	264	15,300.00	8,500.00
TOG-FancyEarring-1 001-150-1000010	Stock In Stock	Lady's White 18 Karat Satin Large	21,250.00	1	264	15,300.00	8,500.00

Custom Tender Detail Report

The **Custom Tender Detail Report** allows you to do exactly that, generate a **customized Tender Detail** report that displays transactions matching your selected payment types. Using the **Payment Types** drop-down, you can select up to 7 payment types to include in this report.

To run the report:

- Click Reports > Activity > Tender Detail > Custom.

Tender Detail Report - Custom

Sale #	Date	Customer	Total Tender	AMEX	DEBIT	Discover Card	JCB Credit Card	MasterCard	Visa	Rewards	Other
001-00411	3/28/2024	Masri, Frank	21,250.00	5,000.00				2,418.15	5,000.00	331.85	8,500.00
Grand Totals			1	21,250.00	5,000.00			2,418.15	5,000.00	331.85	8,500.00

Payment Types: AMEX, DEBIT, Discover

- Personal Check
- Third Party
- Traveler's Check
- AMEX
- DEBIT
- Discover Card
- JCB Credit Card
- MasterCard
- The Dom Card
- Visa
- Wire Transfer
- Credit Memo
- Gift Certificate
- Rewards
- Store Charge (House Account)
- Tender Card

EDGE Tech Shop

3 Corporate Dr
Shelton, CT 06484
(877) 844-0902

Sold To: #001-00142
Frank Masri
(203) 564-1234

150-1000001 Lady's White 18 Karat Satin Large \$21,250.00
Hoop Earrings With 2x1.50Tw Heart I-3
Purchase Emeralds

Rewards Program Card #990500100153
Balance before this transaction... \$331.85
This transaction... (\$331.85) (\$331.85)
Balance after this transaction... \$0.00

Total... \$20,918.15

AMEX #9534... \$5,000.00
AUTH# 548941

Cash Tended... \$1,000.00
Check #448 Tended... \$7,500.00
Visa #6451... \$5,000.00
MasterCard #6112... \$2,418.15
AUTH# 213411

Other is the total of all non-selected Payment Types

Fields on this report include:

Sale #	The ID for the transaction in which the sale took place
Date	The date of the sale
Customer	The customer's ID and name
Total Tender	The total sale
Cash	The amount of the sale in cash
Checks	The amount of the sale in checks
Credit Card Type (Visa, MC, Amex, Disc, etc)	The amount of the sale charged to a specific credit card type, organized under individual columns named for each selected credit card type. Note: These are example column names. Your columns may show different names, as they are determined by what credit card types you have saved.
Gift Certificate/Tender Cards	The amount of the sale charged to a gift certificate and/or tender card, organized under individual columns named for each selected tender type.
Other	The total sale of all non-selected Payment Types

Existing Report Updates

Layaway Report – Store Filter/Grouper

A **Store** filter was added to the **Layaway** report. This means that when this option is **checked**, it will group your results by **Store** if you have selected multiple stores.

Service Transactions – Hyperlinks

The **Service Transactions** report has been updated so that **all** transactions are now **clickable** and will open their corresponding record.

Thank You – Purchase History Filter

A **Purchase History** filter has been added to the **Thank You** report making it possible to now run the report for customers that match a specific purchase criteria.

Thank You Report

Sale Number Old Sale #

Sale Date

Sold To

Sold By

Store Station

Item Number

Purchase History

Group/Sort By...

- Store
- All Original Associates
- Customer (Couple) w/Contact I...
- Customer w/Contact Info
- Month
- Year
- Date
- Station
- Customer (Last, First)
- Customer (Couple)
- Assigned Associate
- Last Transaction Associate
- Last Merchandise Associate
- Referred By

Show Details

Page Breaks

Show Cost

Show Item Description

Use Report Criteria Cover Page

Include Colors On Report

Presets...

Repair Breakdown – Group by Repair SKU

An option was added to the **Repair Breakdown** report that allows you to now group results by **Repair SKU**.

Why In – Show Customer Details

Options were added to the **Why In** report allowing you to now include **Customer Details** and **Addresses**. If **checked**, instead of a summary by Why In, the report will list each **individual customer** that comprises each **Why In** as well as their **contact details** and **basic sales data**.

By Why In Customers Report

Why In	\$ Sales	# Sales	% Sales	# Customers	% Customers	Avg Customer
Customer	Phone	Email	Sale #	Sale Date	Sale Amount	
<NONE>: 5%	1,487.00	1	4.55	1	14.29	1,487.00
Henny Penny (001-00131) 300 Porter Ave , Naugatuck, CT 06770	(860) 598-4561	Henny@Penny.Com	001-00396	3/18/2024	1,487.00	
Google: 9%	3,100.00	2	9.48	2	28.57	1,550.00
Dominick Mastri (002-00069) 1 Main St . Seymour, CT 06483	(203) 430-6303	Dominick@Ajsllc.Com	001-00394	3/18/2024	1,000.00	
Anderson Daves (098-00137) 70 Colony St . Seymour, CT 06483	(203) 450-1234	Anderson@Daves.Com	001-00400	3/18/2024	2,100.00	
Radio: 6%	2,100.00	1	6.42	1	14.29	2,100.00
Ernest Lovelace (001-00008) 2 Lakeside Ave , Colchester, CT 06415	(203) 600-3202	Ernest8505@gmail.com	001-00395	3/18/2024	2,100.00	
Referral: 10%	3,325.00	1	10.17	1	14.29	3,325.00
Debra Downer (001-00064) 900 Robin Rd . Cheshire, CT 06410	(860) 500-6541	Debbie@Downer.Com	001-00398	3/18/2024	3,325.00	
Repair: 4%	1,425.00	1	4.36	1	14.29	1,425.00
Michael Obrien (001-00005) 45 Bishop Place , East Haven, CT 06512	(203) 650-1234	MichaelOB@sbcglobal.net	001-00399	3/18/2024	1,425.00	
TV Ad: 65%	21,250.00	1	65.01	1	14.29	21,250.00
Harry Sanders (001-00156) 100 Chickadee Ln , Seymour, CT 06483	(203) 999-8888	Harry@Sanders.Com	001-00397	3/18/2024	21,250.00	
Grand Totals	35,787.00	7		7		

Inventory Sold by Customer – Improved Export

Additional options will now be included when **exporting** the **Inventory Sold by Customer** report. The exported report will now **include customer contact details** (phone, email, and address).

Inventory Reports General – Sort by Retail/Current

An option was added to **all Inventory Reports** allowing you to now sort your report by the item's **Retail** and **Current** prices.

Sold by Filter – Now Supports Multiple Associates

The **Sold By** filter was updated so that **multiple associates** can be selected. Previously, it was limited to a single associate. This filter appears throughout the software and applies to **many reports**, including **Activity** reports, **Sold Inventory** reports, **Customer** reports, and more.