

# Appraisal Revamp

## Overview

Introduced in Edge version 24.2, the **Appraisal** module of The Edge has been revamped in both POS for intakes, as well as the **Services** menu for better managing your Appraisals to completion.

Changes include:

- A new **Appraisals screen** found under the **Services** menu
- New **fields** and **buttons** added to the **Appraisal Intake** form
- The ability to **attach appraisal documents** from outside sources
- And more!

## System Options

New **System Options** were added giving you even more control over your Appraisals. These options can be found by going to **Administrative > System Options > Appraisal Options**, or by searching the options listed below.

- **Default Type of Appraisal** – Allows you to set your default type of Appraisal using the drop-down menu.
- **ETA Auto Increment** – Allows you to set the number of days the ETA for an Appraisal will automatically be incremented when a new one is created.
- **Add Possession to Receipt** – Controls if the receipt will print whether or not the item is in the store's possession.

## Appraisal Screen – Services Menu


The **Appraisal Screen** has been completely revamped with a new interface for easier navigation to the fields you need to populate for each **Appraisal**, as well as a **new Appraisal Type** that allows you to upload **Appraisal documents** from **outside sources** directly into Edge.

Updates to the Appraisal Screen:

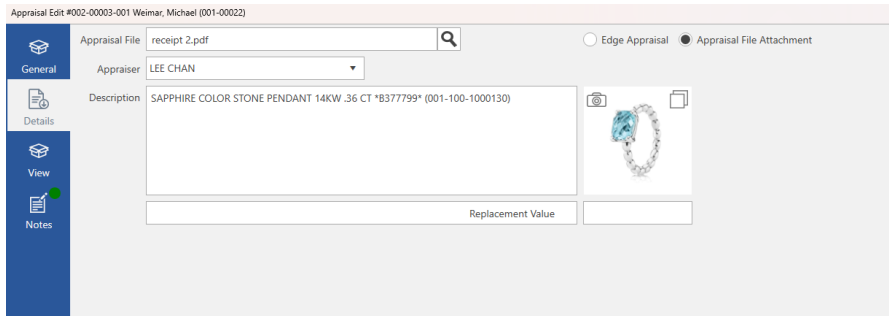
- **General Tab:**

Appraisal Intake Form Screenshot:

Section	Field	Value
Appraisal Info	Appraisal Price	\$50.00
	Tax	\$0.00
	Subtotal	\$50.00
	Deposit	\$0.00
	Due at Pickup	\$50.00
	Cost	\$0.00
	Needed By	9/29/2024
	ETA	9/29/2024
	Done	Enter date
	Picked Up	Cancelled
Customer Info	Name	Fake Customer
	Company	
	Street	1234 Fake St.
	Street 2	
	City	California
	State	Ky
Zip	41007	
Country		
Phone	000-111-2222	
Email	fake@fake.com	
Item Info	Liability	\$1,250.00
	Item in our Possession	<input checked="" type="checkbox"/>
	Item #	
	Location	

- **Last Notified Field** – Shows the last time the customer was notified regarding their Appraisal.
- **Bought Item Button**  - Generates a list of all the items the customer has purchased. You can select an item from the list to add to the Appraisal. Item details will be automatically filled in on the Details tab.

● **Details Tab:**



You now have **two** Appraisal Type options:

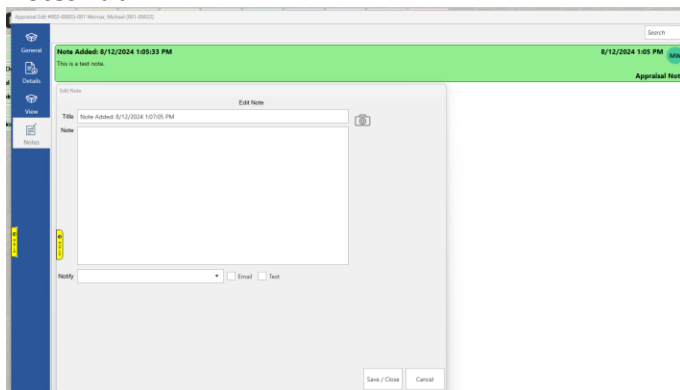
- **Edge Appraisal** – the existing Appraisal option.
- **Appraisal Document** – a new option that allows you to **add Appraisal documents** from outside sources in approved formats for immediate **viewing** and **printing** from the **View** tab.  
**NOTE: The ONLY compatible formats are PDF, RTF, or Word Documents.**

● **View Tab:**



Generates the PDF/attached file in **Preview** mode allowing you to print directly from the preview screen.

● **Notes Tab:**





Notes on the Notes tab are created and saved just the same as other Notes screens found throughout Edge.

# Appraisal Screen – POS Intake

The **Appraisal Screen** through **POS** has been reorganized to make locating desired fields a breeze, as well as new buttons that allow you to pull item information directly into the Appraisal form making your Appraisal Intake process faster and more convenient than ever before.

The screenshot shows the 'Appraisal Intake' form. It is divided into three main sections: 'Appraisal Info', 'Customer Info', and 'Item Information'.  
**Appraisal Info:** Includes fields for 'Previous Appraisal', 'Appraisal Price' (\$500.00), 'Tax' (\$0.00), 'Subtotal' (\$500.00), 'Deposit' (\$0.00), 'Due at Pickup' (\$500.00), 'Cost' (\$0.00), 'Newest By' (10/20/2024), and 'Notify'.  
**Customer Info:** Includes fields for 'Name' (Fake Customer), 'Company', 'Street' (124 Fake Street), 'Street 2', 'City' (Fort Thomas), 'State' (KY), 'Zip' (40509), 'Country' (USA), 'Phone', and 'Email'.  
**Item Information:** Includes 'Item #' (001-002-01696), 'Liability' (\$25.00), 'Location', and a 'Description' field containing '16" ROPE STERLING SILVER 001-002-01696'. There is also a small image of a necklace. At the bottom, there are buttons for 'Save & Next', 'Hide Cost', 'Add Task', 'Save & Close', and 'Cancel'.

New buttons on the **Appraisal Intake** screen:

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**Bought Item Button** - Generates a list of all the items the customer has purchased. You can select an item from the list to add to the Appraisal. Item details will be automatically filled in on the Details tab.
- 
**Find Items Button** - Brings up the **Find Items** filter allowing you to search your inventory for any desired item to add to your Appraisal.

# Appraisal Report

The **Appraisal Report** has been updated to include **Liability**. The option to include **Liability** on this report was previously unavailable.

Appraisal Report 10/31/2024  
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Appraisal #	Customer	Location	Status	Entered	ETA	Sale #	Store	Liability	Price
002-00003-001	Michael (001-00022)		Entered	8/12/2024		002-00003	1	\$3,500.00	\$50.00
SAPPHIRE COLOR STONE PENDANT 14KW 36 CT 'B377789' (001-1000130)									
001-00271-001	Michael (001-00022)		Picked Up	7/8/2024	7/21/2024	001-00271	1		\$50.00
hnm									
Customer: (001-00022)				Count: 9				\$8,750.00	\$475.00
001-00027-001	(001-00002)		Picked Up	8/20/2021		001-00027	1		\$50.00
asfdasfasdf									
Customer: TEST2 TEST2 (001-00006)				Count: 1				\$50.00	
001-00151-001	TEST2 TEST2 (001-00006)		Picked Up	1/31/2022		001-00151	1		\$78.00
Vintage watch made by Rolex 1950									
Customer: TEST2 TEST2 (001-00006)				Count: 1				\$78.00	
Grand totals							Count: 18	\$19,500.00	\$1,028.00