THE EDGE®

User's Guide

Version 20.0.0.114
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MAKER OF THE EDGE
ABBOTT
JEWELRY SYSTEMS, INC.

MORE THAN SOFTWARE, A SOLUTION

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www.theedgeforjewelers.com

The Edge® Version 20.0.0.114

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1 Introduction

Welcome to The Edge!

The Edge is a powerful software application developed specifically to fulfill the needs of the independent retail jeweler in a straight forward and intuitive manner. This includes recording day-to-day business transactions and managing inventory, but goes well beyond that by incorporating advanced tools to aid you in efficiently marketing to your customers, analyzing sales performance, and interpreting inventory performance, among other features.

Based on the latest Microsoft programming platform, The Edge is both cutting-edge and stable. To ensure continued operation in an ever-evolving computing world, the program is updated regularly through our community website (www.edgeuser.com).

It is our hope that you take advantage of everything our software package offers you. To this end, this manual exists as a starting point for any questions on the operation of the software. In the event you require more assistance with a topic, do not hesitate to contact our Support Team.

Also, our Training Department offers several ways to receive additional training. This includes an introductory class that we strongly recommend all new users attend. The class is available in two formats: a live class that you attend at our facilities in Connecticut or a web-based class that can be attended from anywhere. Specific classes covering more advanced topics are also available.

Beyond The Edge software, Abbott Jewelry Systems, Inc. offers other services including various degrees of training, a retail management consulting group, and trade show seminars. Contact our Sales Department for more information.

For your convenience, here is a quick listing of contact information. More comprehensive information is available (see Abbott Jewelry Systems Contact Information).

Support Team	**877-844-0002**	**Support@ajsllc.com**
Sales Department	**866-580-3343**	**Sales@ajsllc.com**
Training Department	**866-580-3343 x 1905**	**Training@ajsllc.com**

1.1 About This Guide

This guide describes how to make the best use of the features and functions of The Edge. It is assumed you are familiar with the use of computers and general Windows® features. Throughout this guide, all references made to Windows imply any of Microsoft 7, Windows 8, Windows 10, and the general Windows-type graphical user interface.

For ease of reading, the following conventions are used throughout this guide:

- A **bold** font is used to highlight features of the user interface, such as buttons, field names, and menu items.
- A `monospaced` font is used to indicate file names and information that you must type.
- Use of ▶ indicates that a series of options are to be selected.

Throughout this guide, you will see extra information designed to provide guidance and assistance for getting the most from The Edge:

Tip! Offers a best practice or other type of extra information to help you get the best results from The Edge.

Note! Provides information to help you get the most from a procedure or function.

Important! Provides information that, without it, could cause the function to behave unexpectedly or results to be inaccurate.

1.2 Additional Reference Materials

Tip sheets and video tutorials can be found at www.edgeuser.com.

1.3 Abbott Jewelry Systems Contact Information

Abbott Jewelry Systems Offices
Main Line: 866-580-3343 (866-580-EDGE)
www.theedgeforjewelers.com
3 Corporate Drive, #215
Shelton, CT 06484 USA

Please do not ship us anything without first contacting us. Packages without a valid RMA number will be refused. If sending something in for a specific person or department, be sure to indicate that.

International Numbers
Phone: +1-203-567-1900
Fax: +1-203-416-6577

The Edge Support
Phone: 877-844-0002
Fax: 877-683-4888
Email: support@ajsllc.com
www.edgeuser.com
For best results, see the tip sheet entitled Getting the Most from Edge Support.

The Edge Sales/Supplies
Phone: 866-580-3343, option 5
Fax: 203-413-2943
Email: sales@ajsllc.com

The Edge Training
Phone: 866-580-3343, option 8
Fax: 203-413-6259
Email: training@ajsllc.com

The Edge Conversion
Phone: 877-844-0002
Fax: 203-816-8555
Email: convert@ajsllc.com

Video Tutorials
www.screencast.com/users/www.AJSLLC.com/folders/EDGE%20Tutorials
Password: edge user

The Edge Retail Academy

Phone: 877-569-8657
Email: becka@edgeretailacademy.com

Integrated Postcards

Drive Retail, LLC
Email: postcards@ajsllc.com
Phone: 770-937-0735
www.driveretail.com

Paper/Forms/Plastic Cards

Hershel Barg & Associates
Phone: 800-675-2675
www.hershelbargassociates.com

Geller Blue Book (Repair SKU Table)

Jeweler Profit: 888-255-9848
www.jewelerprofit.com

Integrated Credit Card Payment Processing

For a list of our certified partners, contact The Edge Sales at 866-580-3343, option 5.

Website Partners

- GemFind: 949-752-7710 http://www.gemfind.com
- Punchmark: 704-910-4774 www.punchmark.com

Training

Contact our Training Department to obtain information regarding our training options.

Phone	Fax	Email
866-580-3343x1905	203-413-6259	Training@ajsllc.com

Available training options include classes held at our offices in Connecticut, on-site training at your store, online classes (webinars) that can be attended from anywhere, and occasional training seminars held throughout the country in concert with jewelry shows/seminars. The Edge Newsfeed contains more information.

The Edge Community

To stay up to date with The Edge, visit our community website: www.EdgeUser.com. This website includes:

- Links to download the latest version of The Edge

- Online discussion forum for Edge users
- Additional reference and how-to documentation
- Online training videos
- The latest Edge and Abbott Jewelry Systems, Inc. news.

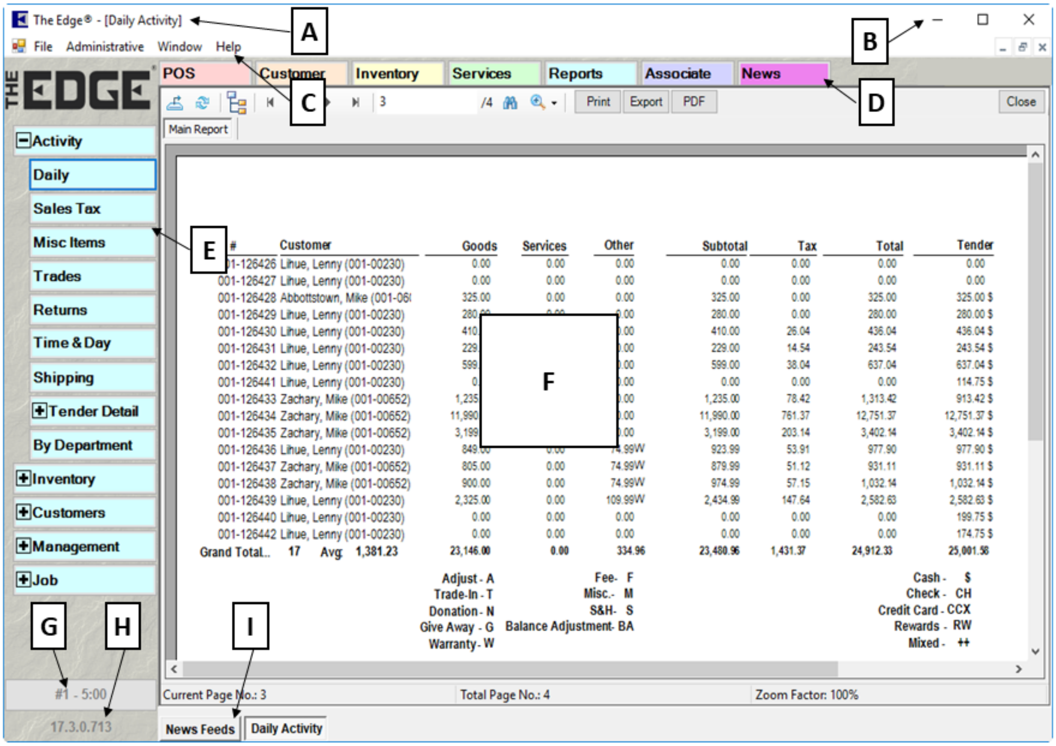
You must register to access The Edge Community site. To register, contact support@ajsllc.com.

2 The Edge Navigation Basics

Understanding the fundamentals of The Edge is a critical first step in learning the software. This section details the common interface components found throughout the software and gives a brief overview of each. It is not a comprehensive explanation, but rather a starting place to help get you oriented.

2.1.1 Main Edge Screen

When you open The Edge, the application will appear as follows:



#	Customer	Goods	Services	Other	Subtotal	Tax	Total	Tender
01-126426	Lihue, Lenny (001-00230)	0.00	0.00	0.00	0.00	0.00	0.00	0.00
001-126427	Lihue, Lenny (001-00230)	0.00	0.00	0.00	0.00	0.00	0.00	0.00
001-126428	Abbottstown, Mike (001-06	325.00	0.00	0.00	325.00	0.00	325.00	325.00 $
001-126429	Lihue, Lenny (001-00230)	280		0.00	280.00	0.00	280.00	280.00 $
001-126430	Lihue, Lenny (001-00230)	410.		.00	410.00	26.04	436.04	436.04 $
001-126431	Lihue, Lenny (001-00230)	229.		.00	229.00	14.54	243.54	243.54 $
001-126432	Lihue, Lenny (001-00230)	599.		.00	599.00	38.04	637.04	637.04 $
001-126441	Lihue, Lenny (001-00230)	0.		.00	0.00	0.00	0.00	114.75 $
001-126433	Zachary, Mike (001-00652)	1,235		.00	1,235.00	78.42	1,313.42	913.42 $
001-126434	Zachary, Mike (001-00652)	11,990		.00	11,990.00	761.37	12,751.37	12,751.37 $
001-126435	Zachary, Mike (001-00652)	3,199		.00	3,199.00	203.14	3,402.14	3,402.14 $
001-126436	Lihue, Lenny (001-00230)	849.00		4.99W	923.99	53.91	977.90	977.90 $
001-126437	Zachary, Mike (001-00652)	805.00	0.00	74.99W	879.99	51.12	931.11	931.11 $
001-126438	Zachary, Mike (001-00652)	900.00	0.00	74.99W	974.99	57.15	1,032.14	1,032.14 $
001-126439	Lihue, Lenny (001-00230)	2,325.00	0.00	109.99W	2,434.99	147.64	2,582.63	2,582.63 $
001-126440	Lihue, Lenny (001-00230)	0.00	0.00	0.00	0.00	0.00	0.00	199.75 $
001-126442	Lihue, Lenny (001-00230)	0.00	0.00	0.00	0.00	0.00	0.00	174.75 $
Grand Total... 17	Avg: 1,381.23	23,146.00	0.00	334.96	23,480.96	1,431.37	24,912.33	25,001.58

Adjust - A
Trade-In - T
Donation - N
Give Away - G
Warranty - W

Fee- F
Misc.- M
S&H- S
Balance Adjustment- BA

Cash - $
Check - CH
Credit Card - CCX
Rewards - RW
Mixed - ++

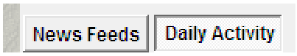
Current Page No.: 3
Total Page No.: 4
Zoom Factor: 100%

A Title Bar	Contains the title of the active window.
B Window Control Boxes	Allows you to minimize, maximize, or close windows.
C The Edge Menu Bar	Contains standard Windows functions and The Edge Administrative functions, which will probably not be needed for day-to-day use. These options are detailed in the sections entitled The Edge Menu Bar and Administrative Menu.
D Main Navigation Bar	Provides access to The Edge's main functional areas. These functions are detailed throughout this manual.

E Function-Specific menu	This contextual menu varies according to the function selected from the **Main Navigation Bar**. Notice that the color of the menu tabs match that of the associated function tab. These options are detailed in the applicable function description.
F Frame Window	Contains contents of an active window.
G Password Time-Out	The time left while logged in, but inactive, as a particular user before the system will log you off automatically. If time-out has passed, and no one is logged in, this field will not appear.
H Version	The version of The Edge that is running.
I Child Window List	Contains buttons for minimized windows so you can maximize them.

The Edge has a number of keyboard shortcuts. To see them, press the Alt key. The underlined letter indicates the key to press along with the Alt key to quickly go to that function or task. For example, from Point of Sale, press Alt+T to activate the Tender area. From there, press Alt+C to select Cash.

Once a task window is open, a button for it will reside on the Windows taskbar at the bottom of the screen.



More than one window can be open at a time. To reactivate a window, select the desired button from the taskbar. To close a function or window, select **Close** or select the close window button in the upper right corner of the screen.

The ESC key on your keyboard can also be used to close the active window.

2.1.2 Navigation Bars

List Navigation Bar

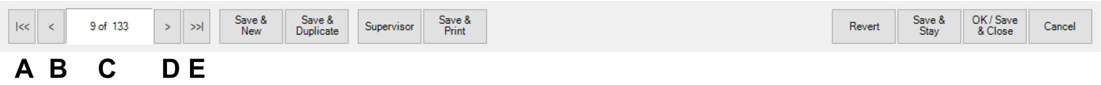
When in the list view, the navigation bar at the bottom of the window will allow you to select and work with lists.

Options in the list navigation bar vary according to the nature of the list and can include:

Presets	Allows you to save or load settings for future lists. See the section entitled Presets for more information.
Edit	Allows you to open the selected record.
Add	Allows you to create a new record of the type listed.
Delete	Deletes the selected record(s).
Group/Mailing List	Creates a mailing list from the selected record(s).
Supervisor	Offers the **Supervisor** menu appropriate for the list.
Switch to Spouse	In customer records, allows you to quickly load information for a customer's spouse/partner, if there is one.
Print List	Allows you to print the list. We recommend printing to the report printer.
Cancel	Closes the list.

Record Navigation Bar

For windows that are for specific records, such as the **Customer** window or the **Item** window, and other functions that involve data entry will offer the **Record Navigation Bar** at the bottom of the window.



Options in the record navigation bar allow you to navigate between records and save records in several ways. These apply to all the sections of The Edge.

A	Returns the first record in the set.
B	Returns the previous record in the set.
C	Indicates what record of the results is presented.
D	Returns the next record in the set.
E	Returns the last record in the set.
Save & New	Saves the record with which you are currently working and opens a new record for additional entry. For example, selecting this option while entering inventory will save the piece you are currently entering and open a new **Add Item** window so that you can add your next piece.
Save & Duplicate	Saves the record you are working on and creates a new record using the same information. This is useful in inventory for quickly copying an item or when entering items that vary only slightly, such as in stone composition.
Supervisor	Presents advanced options depending on the section in which you are working.

Save & Print	Saves the record and offers a detailed record detail in print format. We recommend printing to the report printer.
Revert	Reverts to the information entered in the record since the last save.
Save & Stay	Saves the information entered thus far, but keeps the record open.
OK/Save & Close	Saves the record and closes it.
Cancel	Cancels the action.

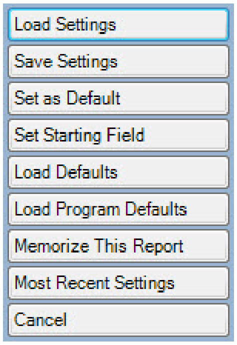
2.1.3 Printing

Many windows have options to print output and report results. That output follows instructions set as described in the section entitled Printer Setup. If no printer setup has been defined, Windows will attempt to use the Windows default printer.

2.1.4 Presets

The **Presets** button appears throughout The Edge in the lower left corner of any of the **Find** or report filters as well as list windows. This function allows you to customize the default parameters of a particular filter or list as well as save current settings under a specific presets name.

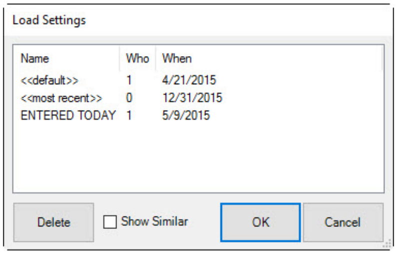
For filters, presets include things like values entered, options selected, and groupings. For list views, presets include things like column selection, column order, column width, and sort order. The apply to only the filter or view that is open unless you select **Set as Default**, in which case they will apply to all filters or views.



Depending on the filter or window with which you are working, options in the **Presets** commands include:

Load Settings

Offers a list of previously saved parameters so that you need not type the same entries over and over. Select the name of the set and select **OK**.

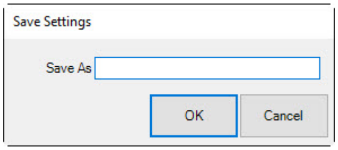


Name	Who	When
<<default>>	1	4/21/2015
<<most recent>>	0	12/31/2015
ENTERED TODAY	1	5/9/2015

The **Show Similar** option returns additional records in the **Load Settings** window. It offers presets that have been saved in similar searches in other areas of The Edge. For example, if you are doing a **Find Customer** in **Point of Sale** and select **Show Similar**, presets saved in other **Find Customers** activities, such as those in **Customer Mailings**, might appear.

Save Settings

Allows you to save the parameters you just entered as a set for use later with **Load Settings**. If the form for which you are saving settings includes a list view, then the list view mode (images vs. list), column order and column sizes (including hidden columns) are also saved. Enter a name and select **OK**.



Set as Default	Saves these settings as the default for each time you run this query or view these results.
Set Starting Field	Allows you to specify the default location for new data entry in that filter.
Load Defaults	Deletes the setting changes made, if any, and loads the last **Set as Default** settings.
Load Program Defaults	Deletes the setting changes made, if any, and enters the initial Edge values regardless of any local defaults you have loaded.
Memorize this Report	If in the **Reports** area, saves the filter options selected as a memorized report. See the section entitled Memorizing Reports for more information.
Most Recent Settings	Allows you to reload the most recent set of parameters and make changes from there.
Cancel	Cancels the **Presets** function and returns to the previous window.

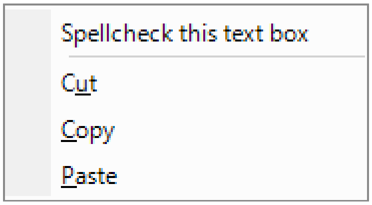
2.1.5 Capitalization

In the case of some text fields, The Edge allows you to quickly standardize the capitalization styles for your entries. Some description fields contain a capitalization selector:

ABC	Converts all text in the field to uppercase.
abc	Converts all text in the field to lowercase.
Abc	Converts all text in the field to title case.

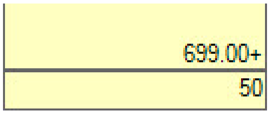
2.1.6 Spellcheck

Also in the case of some text fields, you can spellcheck or use basic editing tools. Right-click to see the text editing menu.



2.1.7 Calculations

The Edge contains an automatic calculator function in many numeric fields. For example, if you click in a field in **Re-price**, you can use the numeric keys on your keyboard to enter the desire equation, and The Edge will make the calculation behind the scenes.



2.1.8 Querying Data

Data stored in The Edge is searchable through query forms that work in the same consistent manner throughout the program. These query forms (e.g., **Customer Find** filter) allow you to specify a variety of criteria to return the specific records you seek. Understanding how to use these queries is an essential building block to using advanced Edge features.

Whether in The Edge database or on-line store, it might be helpful to narrow results. Suggestions for refining your search to get a more direct result of what you are looking for include narrowing by suggested retail price, by stone, but metal, by type. Here are some examples:

A. Looking for a bracelet between $500 – $1,000 suggested retail?
   a. Select `Bracelet` from the **Generic Desc** drop-down menu.
   b. In the **Price Range** fields, type 500 in **Min** and 1000 in **Max**.

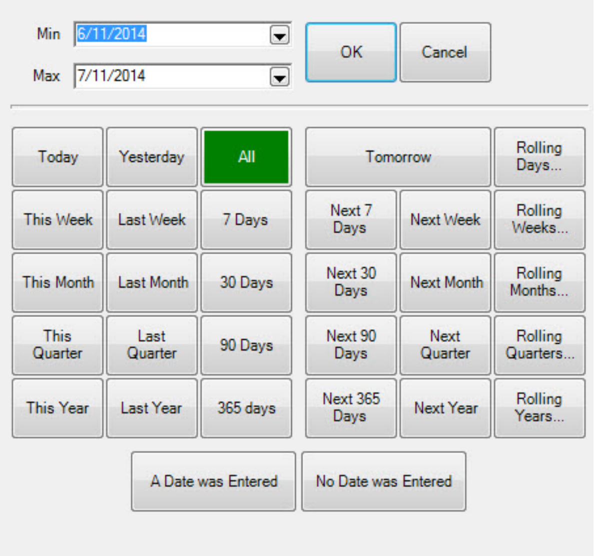
B. Looking for Amethyst earrings?
   a. Select Earrings from the **Generic Desc** drop-down menu.
   b. Select the **Stones** tab, select Amethyst from the **Type** menu.

- **Filter parameters are cumulative. That is, the more parameters you enter, the fewer items will be returned. For example, if you enter a category and a keyword, only items with matches in BOTH fields will be returned. This applies to parameters on all the tabs.**
- **Because this information is specific, if you search by ID, no other search criteria will be used.**

- **Leaving a filter field blank instructs The Edge to include all criteria. For example, if you left all fields blank on a Find filter, it would return a list of all the records.**
- **Wild cards can be used in filters. For example, entering 1** will return all categories in the 100s.**

2.1.9 Filtering by Date

Throughout The Edge, options to narrow results will include filtering by date.



Min 6/11/2014

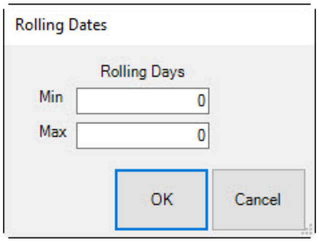
Max 7/11/2014

In the date picker, there are many ways to select the date range you require.

Min/Max	Specific beginning and ending dates for the range.
Relative Dates	**Today**, **Yesterday**, **This Week**, **Next 30 Days**, etc., all allow you to select time periods relative to today. **Last year**, **Last Quarter**, etc., are the last full year, the last full quarter.

Bear in mind that in The Edge, a week is always considered to Saturday.

Rolling Dates	**Rolling Days**, **Rolling Weeks**, **Rolling Months**, **Rolling Quarters**, **Rolling Years** all refer to a way of setting repeating functions such that you do not have to reprogram the function every day or week. The **Rolling Dates** feature allows you to set a minimum and maximum number of days, weeks, months, quarters, or years from the date of the job. This is particularly useful when making use of presets in find filters. For example, if you are setting up an automatic mailing function, and you wish to always send cards 3 weeks in advance of an event, you would specify rolling weeks to **Min** 3/**Max** 3. In this case, the minimum sets the beginning of the third week out and the maximum sets the end of the third week out. This way, the job will look ahead and find any event 3 weeks ahead. It will include associated targets that match within that week relative to the current date. The rolling numbers can be used forward or backward (using a negative number).



Min 0

Max 0

A Date was Entered	This filters by any record in which a date was entered.
No Date was Entered	This filters by any record in which no date was entered.

2.1.10 Setting ETAs and Expiration Dates

When setting an ETA, usually to estimate when a service job or special order will be complete, or expiration dates, The Edge offers three ways to specify the date. You can select from a drop-down calendar, enter a specific date, or enter a number of days from the current date.

If you enter a number, The Edge will calculate the date for you. For example, if you wish to set the date for one week from today, if you enter 7 in the **ETA** or expiration date field, The Edge will populate the field with a date one week from today. In another example, when using this feature for default expiration settings, and you enter 365, and the default expiration date for such cards will always be one year from the date you activate the card.

In many instances, you can further specify time. At the bottom of the calendar are fields to enter hour and minute and select A.M. or P.M. For example, if you want to tell a customer that a repair will be done at 1:00 p.m., you can specify that.

10 : 15 AM

2.1.11 List Output

The **List** data view is the output you will see anytime you use a **Find** filter. This is true whether doing a **Customer Find**, **Inventory Find**, **Repair Find**, etc. Lists can be printed, but are primarily designed for viewing and interacting with data on your screen and as such are not ideally formatted for printing. That is the purpose of reports, described in the section entitled Navigating Reports.

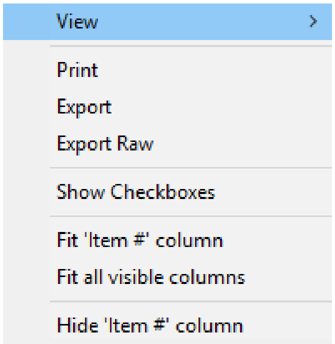
When a list view appears, it will take the form of a spreadsheet or data grid, with data separated into pertinent columns. The columns displayed will vary depending on the type of **Find** you initiated (e.g., a **Customer Find** will result in a list displaying important customer details, i.e., name and address).

In almost all cases, The Edge allows you to rearrange data in the results of queries. Column sizes can be changed by dragging the column divider to the left or right. Rows can be similarly moved up or down. To sort a table by data in a particular column, click the header of that column. The data will be sorted in ascending order. If you click on it again, the data will be re-sorted in descending order.

You can sort multiple columns by clicking on one column header followed by another in reverse order of the desired end result. For example, if you want to sort by last name and then first name, you would click the **First Name** column header first, and then click the **Last Name** column header.

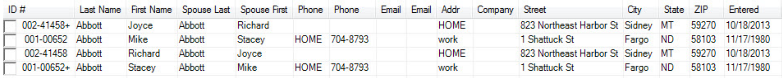
Whenever a query or other screen presents a list of records from which to select, you can select the record and select **OK**, select the record and press **Enter**, or double-click on the record to select it and proceed.

Lists are also equipped with context menus offering appropriate data options. For example, if you right-click on a record from the **Find Customer** results list, the following menu will appear:



This context menu will change to reflect the checkbox-related options. The checkbox column allows you to check records on which to take actions. Options that might appear include:

View	Allows you to change the appearance of the list, i.e., to show photos, etc.
Print	Offers a print preview so you can print selected items.
Export	Returns a **Save** dialog with options to output the entire list as a csv or text file. Again, this will apply to the entire list, not just the selected record.
Export Raw	Allows you to export the raw data to a .csv file.
Show Checkboxes	Displays checkboxes next to each record on the list allowing you to pick those to print/export.

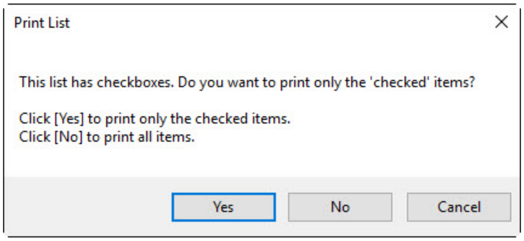


ID #	Last Name	First Name	Spouse Last	Spouse First	Phone	Phone	Email	Email	Addr	Company	Street	City	State	ZIP	Entered
☐ 002-41458+	Abbott	Joyce	Abbott	Richard					HOME		823 Northeast Harbor St	Sidney	MT	59270	10/18/2013
☐ 001-00652	Abbott	Mike	Abbott	Stacey	HOME	704-8793			work		1 Shattuck St	Fargo	ND	58103	11/17/1980
☐ 002-41458	Abbott	Richard	Abbott	Joyce					HOME		823 Northeast Harbor St	Sidney	MT	59270	10/18/2013
☐ 001-00652+	Abbott	Stacey	Abbott	Mike	HOME	704-8793			work		1 Shattuck St	Fargo	ND	58103	11/17/1980

Fit [column name] column	Automatically sizes the right-clicked column to fit the data.
Fit all visible columns	Automatically sizes all columns to the data.
Hide [column name] column	Hide the right-clicked column.

Sort Columns	You can re-sort the list by clicking any of the column headers. Click the column header once to sort the records in ascending order. Click it again to sort the records in descending order.
Resize Columns	You can resize the width of any column. Click the bar at either end of the column header and drag it left or right to increase or decrease the width. Double click the right side of the column header to expand the column to automatically fit the widest record.
Reposition Columns	Change the order of the columns to build a better print layout. Click and drag the column header to the desired location.

By selecting desired records, either one by one or using the **Check All** option above, the subsequent context menus will allow you to act on only the selected records. For example, printing or exporting at this point will result in including only those records that are checked.



This list has checkboxes. Do you want to print only the 'checked' items?

Click [Yes] to print only the checked items.
Click [No] to print all items.

Alternatively, you can print data from a list by selecting **Print List**. To change the page setup for printing lists, select **File ► Printer Setup ► List Printer Setup**. For example, to better fit the data on a page, it may be useful to set your printer to print such lists in landscape format.

2.1.12 Navigating Reports

The **Report** data view is the output you get when you run any of the functions under the **Reports** tab. Reports are generated similarly to lists; the difference is that reports are, by design, specifically formatted for printing.

Most reports are tailored for landscape printing.

Depending on which report you run, you will notice query fields similar, if not identical, to the filter fields found when you generate lists. Regardless of whether you are generating a list or report, the queries behave in the same manner.

Unlike lists, which allow you to manipulate the resulting data on-the-fly, reports generate static documents. All of the report view customizations must be done through the **Options** tab on the report query. For additional information on running and customizing the various reports, see the section entitled Reports.

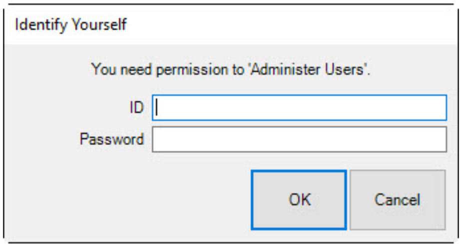
2.1.13 Security and User Permissions

The Edge is set up to ensure that only authorized personnel can conduct transactions. For example, all users are permitted to make a sale. However, a supervisor's password might be required to access reports, tax settings, or even inventory areas. For further security, logon credentials timeout after 5 minutes.

The Edge will terminate if the system clock differs from Internet time by more than 10 minutes. This is to prevent data integrity issues. If this happens repeatedly, have your IT technician check your Internet connections and conduct some ping tests.

Identify Yourself

When a password-protected function is accessed, the **Identify Yourself** security dialog will appear.



Identify Yourself

You need permission to 'Administer Users'.

ID

Password

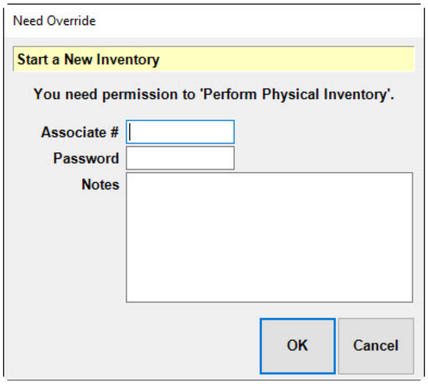
Enter your **ID** and **Password** and select **OK**. If your ID and password are accepted, the desired window will appear and allow you to proceed. If your ID and password are not accepted, you will receive an **ID Failure** message. If you feel you received this message in error, contact your supervisor or system administrator. Each user's permissions can be customized as needed. See the section entitled Security for more information.

When using the Edge for the first time with no conversion, you must enter an associate. When you do this, there are no permissions in yet, so there is no way to get to Associates ► Add. When you go there, and permission window comes up, select Cancel. The Edge will allow you to go to the Add window enter an associate, but that's all until someone with permissions is entered.

If you forget your password, contact The Edge Support Team for assistance in resetting it.

Need Override

Separate from **Identify Yourself** is the **Need Override** window; this is to capture the permission of a supervisor or user who can allow another user to perform a specific task. It also records who, when, and why an action is taken. **System Options** can require that the **Notes** field be completed.

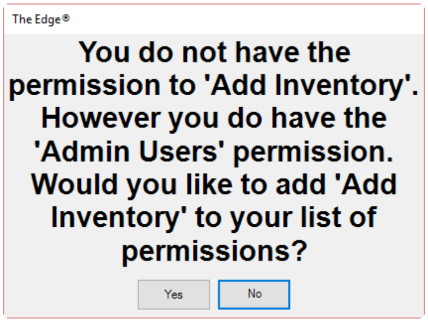


Start a New Inventory

You need permission to 'Perform Physical Inventory'.

Add Permission

A third type of permission window pops up when permission is not actually specified for the associate, but the associate is an administrator. In that case, the user will be prompted to update his or her own record to allow the activity. This will be saved in the associate's security settings.



You do not have the permission to 'Add Inventory'. However you do have the 'Admin Users' permission. Would you like to add 'Add Inventory' to your list of permissions?

2.1.14 Search Functionality

From many areas, there is a search option in the upper right corner of the window. Use this to find text strings on the window.

2.1.15 Adding and Managing Photos

The camera icon (📷) returns the photo menu to capture an image of the item. More than one image can be associated with the record. Depending on the record type, options can include:

Acquire	Obtain a photograph using your twain device.

Retake Image	Allows you replaces the image currently displayed. It is only available when an image already exists.
Copy File	Allows you to browse for a photo file and copy it into The Edge photo folder. It also associates the file with the record.
Use File	Associate an existing file with this record. It can be an image, but it can also be anything you want to associate with a customer or item record: for example, a pdf of an invoice or an appraisal document, or even a fax. Use the Windows file window and change the file type filter to All Files to see all your options. If the target is outside the photo folder, you will be prompted to copy the file to the photo folder. If you opt not to copy the image, it will not be shown.
View Image	Opens the image in the Windows photo gallery.
Edit Image	Opens the image editor as described in the section entitled Image Editor.
Print Image	Prints the image to your report printer.
Image Properties	Opens the Windows **File Properties** window.
Copy Image to Clipboard	Puts the image in the clipboard to paste elsewhere.
Copy File Name to Clipboard	Puts the file name in the clipboard to paste elsewhere.
Make Default Image	Makes this the default image.
Remove Image	Removes this image from this record.
Remove All Images	Removes all images from this record.
Select Source	Choose the twain device or camera to obtain a photo.
Cancel	Cancel the photo menu.

2.1.15.1 Image Editor

All images in The Edge, including item images and customer photos, have a context menu of available actions. This includes places where there is only an image placeholder. Note that more than one image can be associated with the record.

Item Image

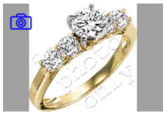


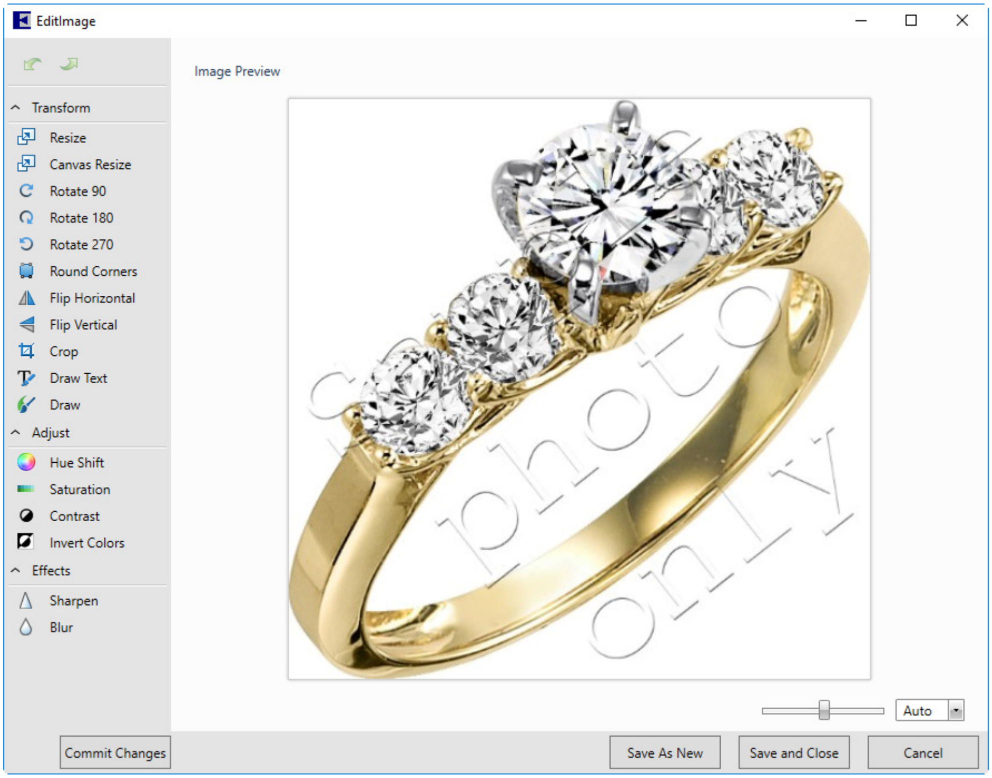
Image Placeholder

The camera icon (📷) contains the photo menu to capture an image of the item. Depending on the record type, options can include:

Acquire	Obtain a photograph using your TWAIN device.
Retake Image	Allows you replaces the image currently displayed. It is only available when an image already exists using your TWAIN device.
Copy File	Allows you to browse for a photo file and copy it into The Edge photo folder. It also associates the file with the record.
Use File	Associate an existing file with this record. It can be an image, but it can also be anything you want to associate with a customer or item record: for example, a pdf of an invoice or an appraisal document, or even a fax. Use the Windows file window and change the file type filter to All Files to see all your options. If the target is outside the photo folder, you will be prompted to copy the file to the photo folder. If you opt not to copy the image, it will not be shown.
View Image	Opens the image in the Windows photo gallery.
Edit Image	Allows you to work with the image in an image editor. See the section below about editing images.
Print Image	Prints the image to your report printer.
Image Properties	Opens the Windows **File Properties** window.
Copy Image to Clipboard	Puts the image in the clipboard to paste elsewhere.
Copy File Name to Clipboard	Puts the file name in the clipboard to paste elsewhere.
Make Default Image	Makes this the default image.
Remove Image	Removes this image from this record.
Remove All Images	Removes all images from this record.
Select Source	Choose the twain device or camera to obtain a photo.
Cancel	Cancel the photo menu.

To work with an image using the Image Editor:

1. Select the desired image within the desired record.
2. Select **Edit Image** from the image control context menu. The **EditImage** window will open.



Functions available in the **Image Editor**:

Transform

Resize Resizes the image in pixels or in percentage of the current size.

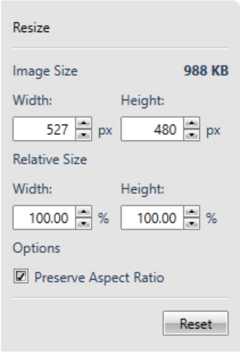

Resize

Image Size 988 KB

Width: 527 px Height: 480 px

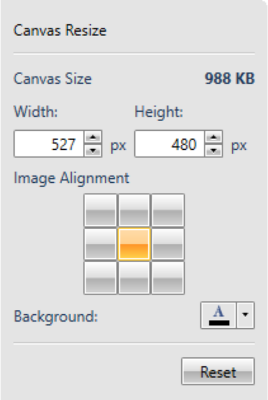
Relative Size

Width: 100.00 % Height: 100.00 %

Options

☑ Preserve Aspect Ratio

Canvas Resize Resizes the canvas. The canvas is the space in which the editor works. In the example above, the canvas is the same size as the image. If you make the canvas larger, you will see a background. If you make it smaller, the image will cover the canvas or even be cropped to fit on it. You can change where on the canvas the image falls and the color of the canvas.



Canvas Resize

Canvas Size 988 KB

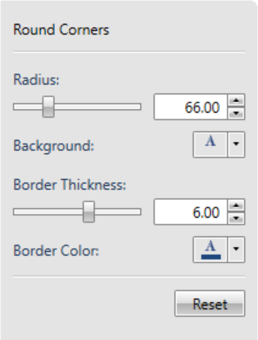
Width: 527 px

Height: 480 px

Image Alignment

Background:

Rotate 90	Rotates the image 90 degrees clockwise.
Rotate 180	Rotates the image 180 degrees clockwise; this is in addition to previous rotations.
Rotate 270	Rotates the image 270 degrees clockwise; this is in addition to previous rotations.
Round Corners	Rounds the images corners. Use Radius to set how much rounding to use. Use border to add a border to the image. Notice that rounding won't show on a white background unless you add a border.



Round Corners

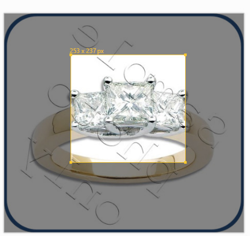
Radius: 66.00

Background:

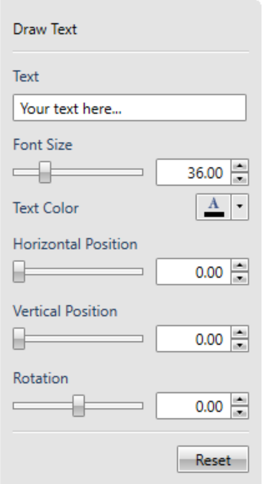
Border Thickness: 6.00

Border Color:

Flip Horizontal	Reverses the image left to right.
Flip Vertical	Reverse the image top to bottom.
Crop	Creates a window to frame out and crop the image.



Draw Text Allows you to add and place text on the image. You can change the size, color, location, and rotation of the text over the image.



Draw Text

Text: Your text here...

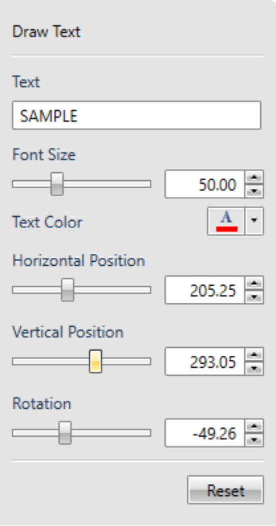
Font Size: 36.00

Text Color

Horizontal Position: 0.00

Vertical Position: 0.00

Rotation: 0.00



Draw Text

Text: SAMPLE

Font Size: 50.00

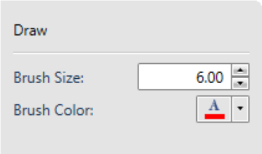
Text Color

Horizontal Position: 205.25

Vertical Position: 293.05

Rotation: -49.26

Draw	Allows you to draw illustrations on the image.



Draw

Brush Size: 6.00

Brush Color:

Adjust

Hue Shift	Allows you to change the hues/colors of the image by shifting through the color wheel.
Saturation	Allows you to reduce or increase the depth of existing colors.
Contrast	Allows you to reduce or increase the contrast between existing colors.
Invert Colors	Reverses the image like a negative. Dark colors become light and light colors become dark.

Effects

Sharpen	Allows you to sharpen the lines in the image.
Blur	Allows you to soften the lines in the image.

3. Use the image commands to make changes to the image.
4. Select a **Save** option.
   - **Save As New** creates a new file from the edited image.
   - **Save and Close** saves the open image with the changes.
   - **Reset**, where available, removes any changes made since the last time you saved.
   - **Commit Changes** will exit any editing functions and save the results. If you hit **Enter** from any of the control boxes, your changes will be committed.
   - **Zoom** lets you view the image larger or smaller. It does not change the image size, just the view.

2.1.16 Numbering Conventions

In The Edge, all items and transactions have unique identifiers, which are assigned automatically by The Edge. So you can easily access records, these are cross-referenced across associated customers, sales, items, services, and parts.

2.1.16.1 Numbering on Receipts

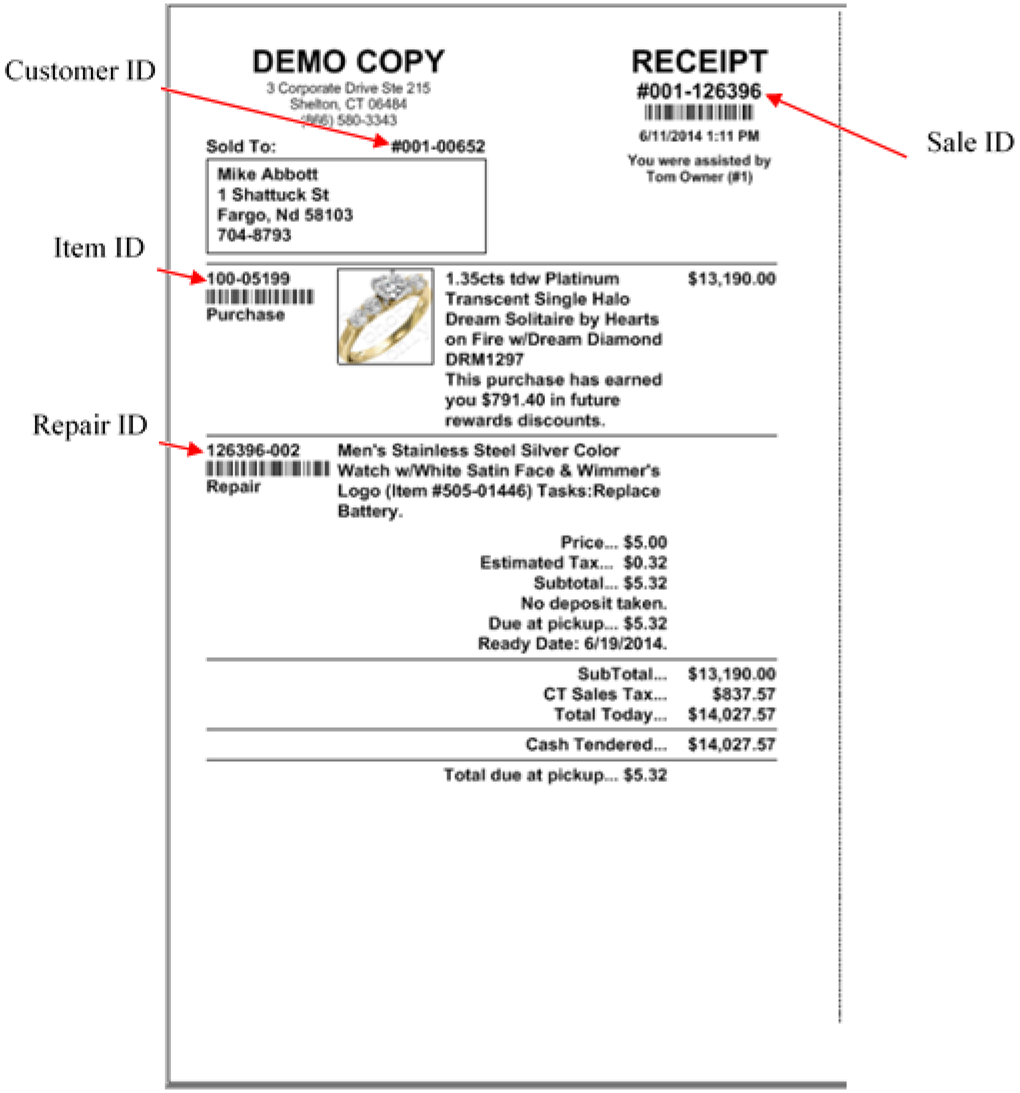
As a demonstration of receipt numbering, suppose a customer has purchased an item and left an item for repair. The following table breaks down what the transaction IDs are.

Numbering Scheme	Example	Breakdown
Sale ID	001-126396	001 is store 126396 is sale number
Customer ID	001-000652	001 is the store where the customer first made a purchase 000652 is the customer number
Item ID	[001-]100-05199	[001 is store where the item is located] (if you only have one store, that store number does not appear, as is the case here) 100 is category number 05199 is the item number
Repair/custom job service request and associated tasks ID	[001-]126396-002-001	[001 is store where the transaction originated] (not shown here, but on the envelope) 126396 is sale number 002 is job number; it corresponds with the line number in the original in-take transaction 001 is the repair task number (shown on the repair envelope, not on the receipt

Although all records contain a store number, if you are a single-store operation, it is unnecessary to use the store number prefix. The store number is 001 by default and is only used behind the scenes.

For multi-store users, the store number is the location of the transaction by default. If you are searching for a record within your store, the store number is automatically assigned. However, if you are searching for an item or transaction outside your store, you must include the store ID.

There is never a reason to type leading zeroes when searching for a record. For example, if you're searching for item number 002-100-00001, you need only enter 2-100-1. The Edge fills in the leading zeroes.



DEMO COPY

3 Corporate Drive Ste 215
Shelton, CT 06484
(866) 580-3343

RECEIPT

#001-126396

6/11/2014 1:11 PM

You were assisted by
Tom Owner (#1)

Sold To: #001-00652

Mike Abbott
1 Shattuck St
Fargo, Nd 58103
704-8793

100-05199
Purchase

1.35cts tdw Platinum Transcent Single Halo Dream Solitaire by Hearts on Fire w/Dream Diamond DRM1297 This purchase has earned you $791.40 in future rewards discounts. $13,190.00

126396-002
Repair

Men's Stainless Steel Silver Color Watch w/White Satin Face & Wimmer's Logo (Item #505-01446) Tasks:Replace Battery.

Price... $5.00
Estimated Tax... $0.32
Subtotal... $5.32
No deposit taken.
Due at pickup... $5.32
Ready Date: 6/19/2014.

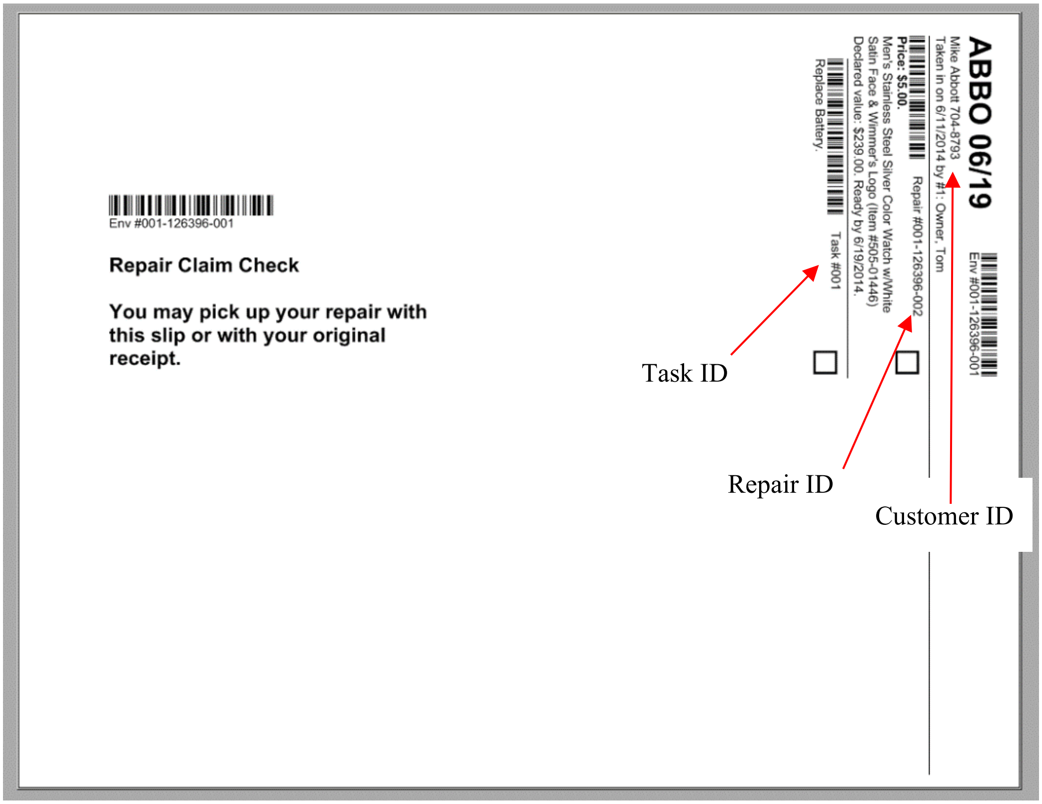
SubTotal...	$13,190.00
CT Sales Tax...	$837.57
Total Today...	$14,027.57
Cash Tendered...	$14,027.57

Total due at pickup... $5.32

2.1.16.2 Numbering on Repair Envelopes

When working with repair envelopes, similar conventions are used. While this example uses a repair, the conventions apply to custom jobs, appraisals, and special orders.

Numbering Scheme	Example	Breakdown
Customer ID	001-000652	001 is the store where the customer first made a purchase 000652 is the customer number
Repair ID	001-126396-002	001 is store 126396 is sale number 002 is the job number
Task ID	001	001 is the task number for the repair



Env #001-126396-001

Repair Claim Check

You may pick up your repair with this slip or with your original receipt.

ABBO 06/19

Env #001-126396-001

Mike Abbott 704-8793
Taken in on 6/11/2014 by #1: Owner, Tom

Repair #001-126396-002 ☐
Price: $5.00.
Men's Stainless Steel Silver Color Watch w/White Satin Face & Wimmer's Logo (Item #505-01446)
Declared value: $239.00. Ready by 6/19/2014.

Task #001 ☐
Replace Battery.

A single sale can have an infinite number of lines or jobs. A job can have an infinite number of tasks. An envelope can have up to four repair jobs, based on System Options.

2.1.16.3 Barcode/Tender/Rewards/Referral Card Numbering

The Edge required numbering specification is Interleaved 2 of 5, which starts with a unique four-digit assigned prefix based on the store account and card type and ends with a check digit, which is a calculated number to ensure validity.

Each card has a printed number and a barcode number, which also has a numerical representation. Either number can be used for entering or scanning the card.

2.1.16.3.1 Tender/Rewards/Referral Card Numbers

The printed numbers on tender, rewards, and referral cards will always be 12 digits long.
Example: 8514000000010
Broken down, the number consists of 3 parts: [8514][00000001][0]

- 8514 represents the custom-assigned prefix for the store account and card type
- 00000001 represents the sequential card number
- 0 is the check digit.

2.1.16.3.2 Tender/Rewards/Referral Barcode Numbers

The barcode numbers associated with tender, rewards, and referrals cards will always be 14 digits long.
Example: 598514000000010
Broken down the number consists of 4 parts: [59][8514][00000001][0]

- 59 represents the prefix that provides instruction to The Edge concerning the type of barcode scanned
- 8514 represents the custom-assigned prefix for the store account and card type
- 00000001 represents sequential card number
- 0 is the check digit.

3 Inventory

Good inventory management will lead to better overall performance and profitability. The Edge software will measure and clearly report inventory performance. By setting up categories, items, and vendors before launching The Edge, you will maximize these management features.

A category is a collection of items having like characteristics (e.g., colored stone rings set in precious metals, strands of pearls, diamond bracelets, and diamond engagement rings). However, some categories may consist of odds and ends and have little in common (e.g., all men's miscellaneous jewelry). It is by the categories you setup that sales performance will be measured.

Categorizing inventory is the first and most important step in setting up The Edge software. With that in mind, take ample time to consider the categories that will provide you with the most benefit. Up to 999 categories can be created, but you should avoid numbers 1–99. The Edge software will provide detailed reporting by subcategories such as stone or metal type from the information provided when entering items. It is not necessary to define a category of ladies' ruby rings or ladies' sapphire rings to be able to measure the performance of these product types. A colored stone ring category will provide the management information needed to make better buying decisions. You can run a report showing what percentage of business was done by stone type when needed.

The Edge comes with a default list of categories that we strongly urge you to consider as the core of your inventory categorization. Slight modifications are expected. If you are considering a major overhaul, contact The Edge Support Team for direction.

As a matter of category structure, we recommend the following strategy:

1. Start with default categories provided with The Edge.
2. Delete those that you don't need. You can always add them back if you add that product. Keep in mind, however, that you cannot delete a category that has items.
3. Add any categories that are required but that weren't included with The Edge.
4. Modify each category, both new and existing, to meet your needs.

Details for accomplishing these steps are described in the section entitled Categories.

3.1 Categories

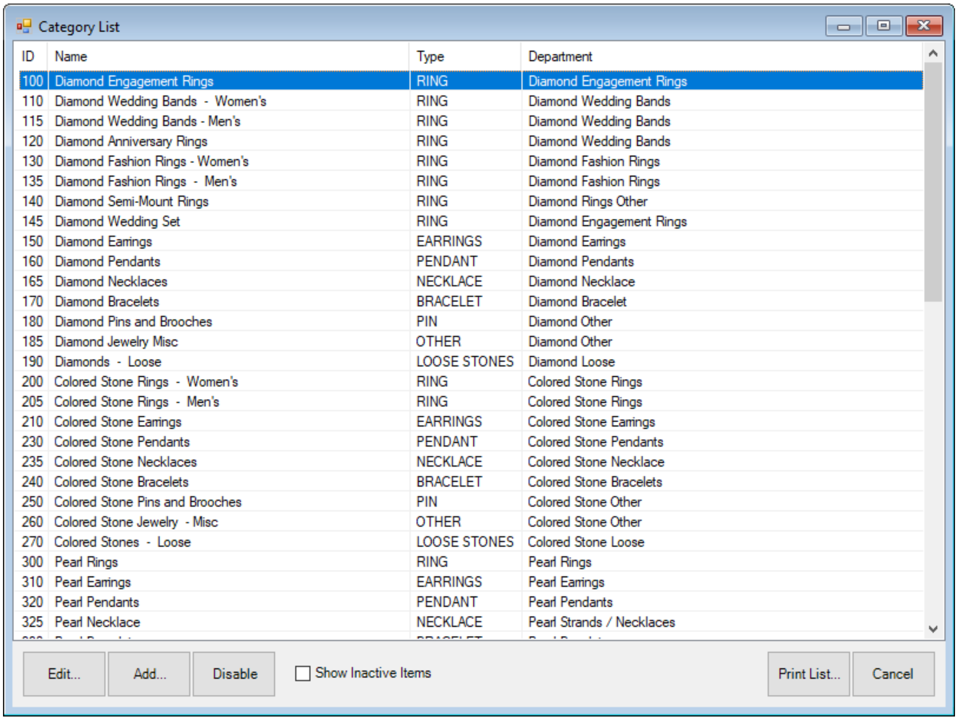
Before you can start entering inventory, you must have set up a category for the items you wish to enter and you must have defined the vendor that provided you with the items to The Edge software. A category is a collection of related items (i.e., chains, charms, diamond bracelets, colored stone rings, giftware, etc.) that the software will use as a foundation in producing management reports. Dividing items into categories will assist you in discovering which categories are producing the most revenue and which price points are most productive within the categories.

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. For help ensuring your categories are well designed, see the tip sheet entitled Category Cleanup at www.edgeuser.com.

3.1.1 Listing Categories

To see a list of existing categories:

1. Select **Categories ► List** from the **Inventory** menu. A list of all the categories entered into The Edge, including their ID numbers, names, and types, will appear.



ID	Name	Type	Department
100	Diamond Engagement Rings	RING	Diamond Engagement Rings
110	Diamond Wedding Bands - Women's	RING	Diamond Wedding Bands
115	Diamond Wedding Bands - Men's	RING	Diamond Wedding Bands
120	Diamond Anniversary Rings	RING	Diamond Wedding Bands
130	Diamond Fashion Rings - Women's	RING	Diamond Fashion Rings
135	Diamond Fashion Rings - Men's	RING	Diamond Fashion Rings
140	Diamond Semi-Mount Rings	RING	Diamond Rings Other
145	Diamond Wedding Set	RING	Diamond Engagement Rings
150	Diamond Earrings	EARRINGS	Diamond Earrings
160	Diamond Pendants	PENDANT	Diamond Pendants
165	Diamond Necklaces	NECKLACE	Diamond Necklace
170	Diamond Bracelets	BRACELET	Diamond Bracelet
180	Diamond Pins and Brooches	PIN	Diamond Other
185	Diamond Jewelry Misc	OTHER	Diamond Other
190	Diamonds - Loose	LOOSE STONES	Diamond Loose
200	Colored Stone Rings - Women's	RING	Colored Stone Rings
205	Colored Stone Rings - Men's	RING	Colored Stone Rings
210	Colored Stone Earrings	EARRINGS	Colored Stone Earrings
230	Colored Stone Pendants	PENDANT	Colored Stone Pendants
235	Colored Stone Necklaces	NECKLACE	Colored Stone Necklace
240	Colored Stone Bracelets	BRACELET	Colored Stone Bracelets
250	Colored Stone Pins and Brooches	PIN	Colored Stone Other
260	Colored Stone Jewelry - Misc	OTHER	Colored Stone Other
270	Colored Stones - Loose	LOOSE STONES	Colored Stone Loose
300	Pearl Rings	RING	Pearl Rings
310	Pearl Earrings	EARRINGS	Pearl Earrings
320	Pearl Pendants	PENDANT	Pearl Pendants
325	Pearl Necklace	NECKLACE	Pearl Strands / Necklaces

Fields in the **Category List** include:

ID	The unique identifier for the category.
Name	The name of the category; it describes the items that fit in the category.
Type	The high-level type of item that fits in the category.
Department	The department to which this category is assigned.

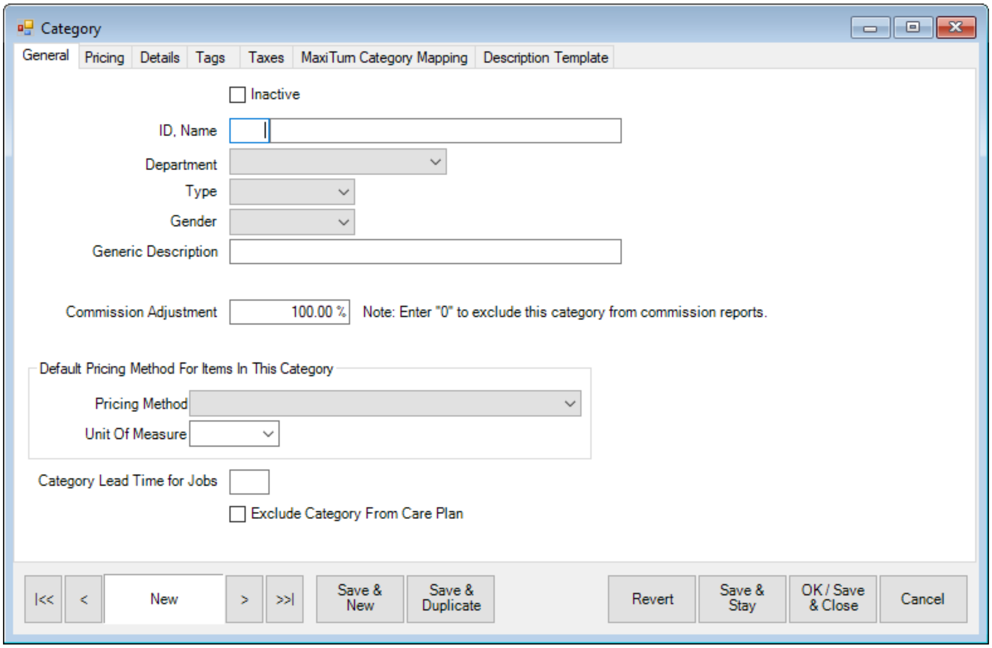
2. From this window, you may select a category to edit, add a new one, or delete categories by using the buttons across the bottom of the window.
3. To print the list as a whole, select **Print**.

- **Access to the categories is often set as a supervisory function and might not be available to all associates using The Edge.**
- **If you attempt to delete a category, it will only be marked Inactive. For a category to be marked Inactive, it may not have any items in stock, on layaway, on memo out, or work-in-progress.**

3.1.2 Adding a Category

To add a new category to the system:

1. Select **Categories ► Add** from the **Inventory** menu. A blank category window will appear with the **General** tab selected.



☐ Inactive

Commission Adjustment 100.00 %

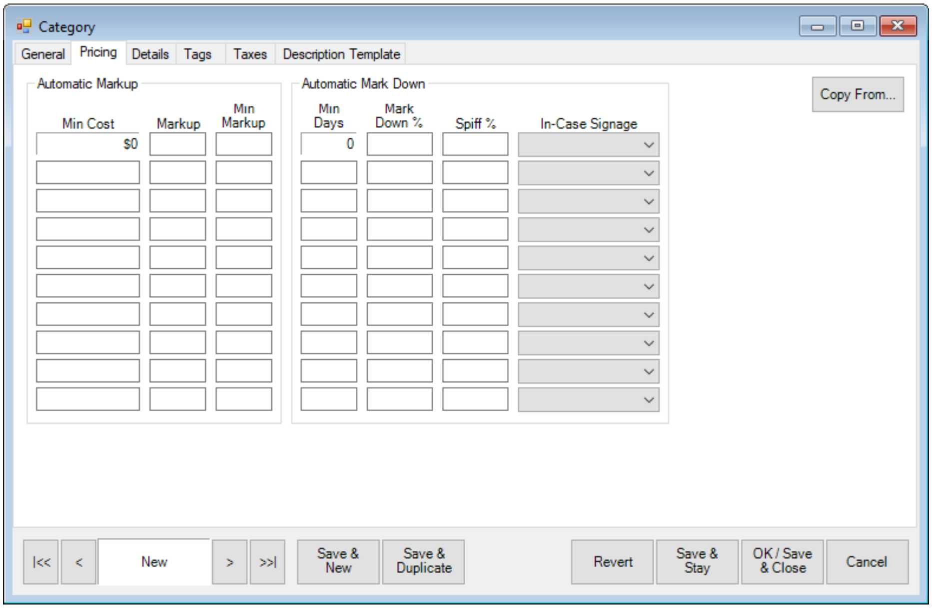
Note: Enter "0" to exclude this category from commission reports.

☐ Exclude Category From Care Plan

Fields and options in the **General** tab include:

Inactive	Indicates that the category should be considered inactive. It will no longer appear on any list views.
ID, Name	The ID number and name of the category. The ID must be numeric.
Department	The department to which you want this category to be assigned.
Type	The type of items to go into this category.
Gender	The gender for which the items are intended.
Generic Description	A brief description of the items that will be in this category. This will be included as part of the suggested description that is offered when entering an item.
Commission Adjustment	Any adjustment to commission that might be applied to sales of items in this category. The default setting of 100% specifies that an associate would receive their full commission percentage as dictated by the commission options on the associate's record.
Default Pricing Method for Items in this Category	Defines the default pricing method to be applied to items added to this category. Options include: • `Fine Jewelry, Individual Item Pricing` • `General Merchandise, UPC/SKU Pricing` • `Buy and Sell Item by Unit of Measure` • `Buy and Sell Item by Measure Only` • `Mixed Retail Pricing (PRE)` For fine jewelry pricing, The Edge will assign unique item numbers to each item. Other pricing methods apply to bulk inventory. For information regarding bulk setup and use, see the section entitled Bulk Inventory.
Category Lead Time for Jobs	If an item from this category is a build or assemble job, the default number of days estimated for completion.
Exclude Category from Care Plan	If you are offering care plans to your customers, checking this box will exclude items in this category from that offering.

2. Complete the **General** tab fields as appropriate, and select the **Pricing** tab.



In the **Pricing** tab, you can indicate that certain categories are automatically marked up or down. Fields and options in the **Pricing** tab include:

Automatic Markup	This section defines the markup to be applied to items in this category if automatic pricing is enabled. See the section entitled Inventory Options for additional information on enabling/disabling automatic pricing. Also, note that markup can also be specified at the vendor level if necessary. This will override the category markup. See the section entitled Adding a Vendor for additional information.
Min Cost	For items of the indicated minimum cost, treat as in the following fields. Note that these fields together, read vertically, constitute ranges for which the markup applies. To use a single markup for the entire category, it is only necessary to fill in the first row. However, this is not advisable as price points on performance reports are derived from this markup table.
Markup	The factor by which to set the retail price. Entering 3 would multiply the cost by a factor of 3. For example, if you enter 3, a $50 item would have a retail price set at $150. For any particular item, this can be overridden at the time of entry.
Min Markup	Defines the minimum price at which this item can be sold. If you attempt to sell the item for less than this price, you will be prompted for a manager override. So if 2 is entered here, a $50 item that should sell for $150 can sell for no less than $100 without approval.

Automatic Mark Down This section defines an automatic markdown to be applied to inventory based on age for the purposes of reducing old inventory. The markdown is only applied to inventory if you initiate an inventory repricing. See the section entitled Reprice Items for more information.

Min Days The minimum number of days for which the markdown applies. Note that these fields together, read vertically, constitute ranges for which the markdown applies. At 540 days, or roughly a year and a half, we suggest that a spiff be applied. See below.

Mark Down % The percentage by which the items should be marked down. At 600 days, we suggest a markdown of 30% be applied. This means the $50 item retailing for $150 will now show a retail of $105.

Spiff Any spiff, or percentage of profit, to be applied for the sale of an item in the category. We recommend that at **Min Days** of 540, spiff of 50 be entered. This provides the employee a bonus of half of the profit that was generated by the sale. On the $50 item that was selling for $150, a spiff of 50 would award the associate $50 as that is 50% of the $100 profit generated.

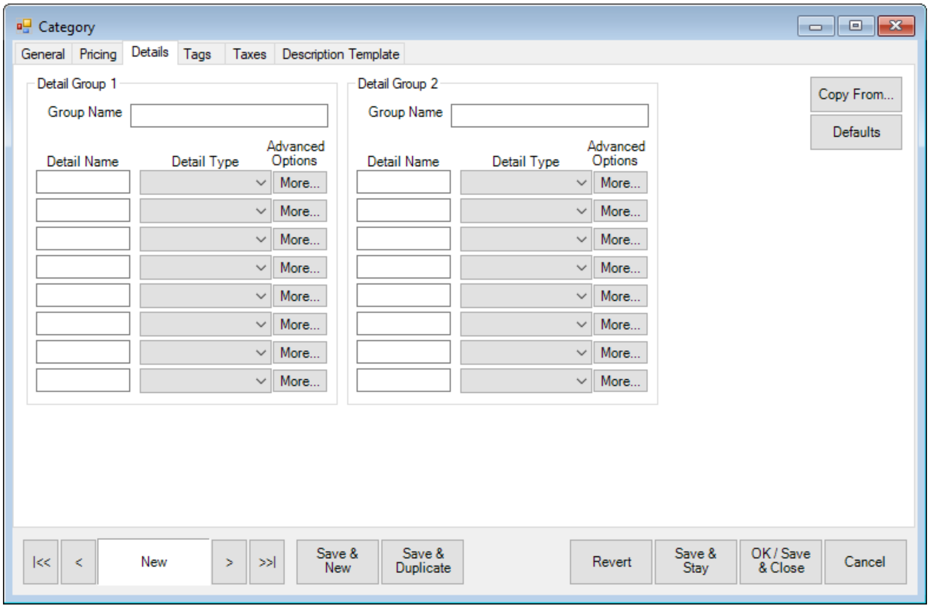
If you pay commissions, the greater of the values will be paid, but not both.

Using the spiff field here will cause the item to appear on Bonus Posters for associate reference. See the section entitled Bonus Poster for more information.

In-Case Signage The sign to be displayed along with the items marked down. These signs are printed as described in the section entitled Printing Signage and designed as described in the section entitled Sign Formats.

Signs must be set up before this feature will work.

3. Complete the **Pricing** tab fields as appropriate, and select the **Details** tab.

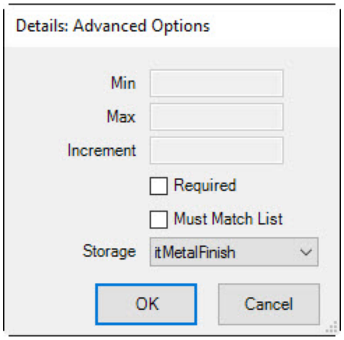


The **Details** tab allows you to provide the category with descriptors that apply only to it, such as the kind of strap on a watch, serial number, metal type, etc. These details will appear as fields when entering items into this category. Additionally, any detail created here can be printed on the tag. There are two groups of details, **Group 1** and **Group 2** to accommodate items that may have two parts, such as a pendant and chain. In each group, fields include:

Group Name	Optional. Allows you to label the detail columns in the **Item** window.
Detail Name	The label of the detail field in the **Item** window.
Detail Type	This defines whether the descriptor includes predefined choices derived from a list or if it will provide a blank field in which to type in the desired data when entering the item. To use a predefined list, select it. For information on creating these lists, see the section entitled Lists. To use a blank field to create a custom detail, in the **Detail Name** field, enter the name of the field. Select either `NUM` or `TEXT` from the **Detail Type** drop-down menu. `NUM` will only allow you to enter numbers while `TEXT` will accept any characters. This field will now be an option in the **Tags** tab, **Data** drop-down menu.

Advanced Options/More

Returns the **Details: Advanced Options** dialog.



Details: Advanced Options

Min

Max

Increment

☐ Required

☐ Must Match List

Storage: itMetalFinish

This dialog defines data characteristics. Its contents may vary based on the type of data defined above.

If you are editing/replacing existing default details, you must change the **Storage** on that detail to one of the numbered **itDetail** choices. If you are creating new details, you need not change the **Storage** setting.

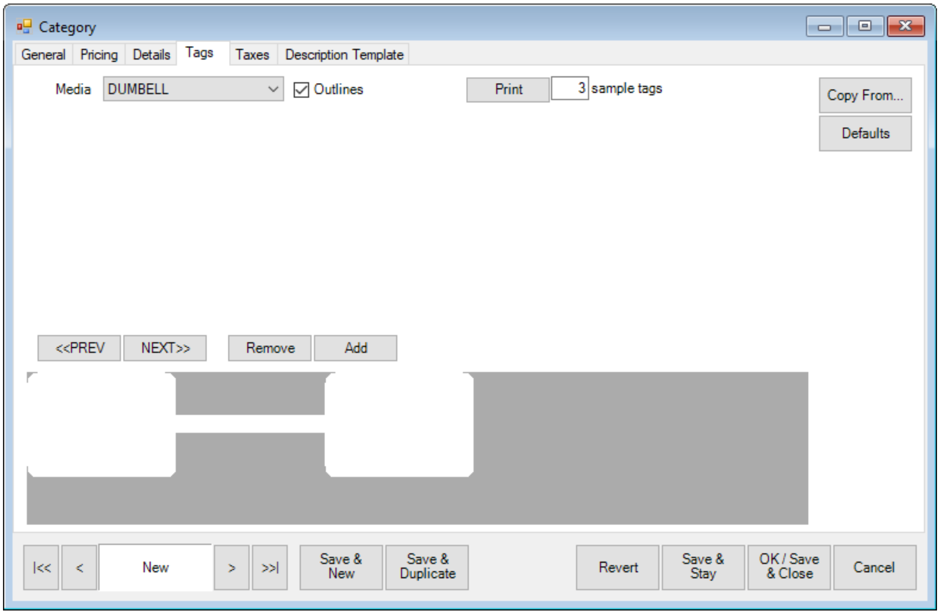
Check the **Storage** drop-down menu for data types that exist in the database. Values might include:

- `itStyle`
- `itMetalFinish`
- `itMetalColor`
- `itMetalType`
- `itMetalWeight`
- `itSize`
- `itLength`
- `itMfg`
- `itOldBarcode`
- `itOldKey`
- `itCostReplacement`
- `itSerialNumber`
- `itMillimeter`
- `itDetail_1`
- `itDetail_2`

You can use the **Copy From…** option for any particular tab to import that tab information from another category. You can also use the **Defaults** option to load default category information.

The suggested item description generated for the receipt is from category, type, gender, stones, and system-generated detail fields. Custom detail fields will not affect the description. You can manually update the description when adding inventory.

4. Complete the **Details** tab fields as appropriate, and select the **Tags** tab.



Media DUMBELL

☑ Outlines

3 sample tags

Fields and options in the **Tags** tab include:

Media	The type of tag to print. The Edge comes with default layouts for each available type.
Outlines	Shows outlines on the screen while the tag is being composed. Outlines are never printed and should be enabled while manipulating the tag layout.
Print	Select to print sample tags. Also useful for testing the functionality and alignment of a tag printer.
Details of Selected Tag Field	Shows the details of the selected tag field. The fields are described below.
Previous	Goes to the previous field on the tag.
Next	Goes to the next field on the tag.
Remove	Removes the field from the tag.
Add	Adds a new field on the tag.

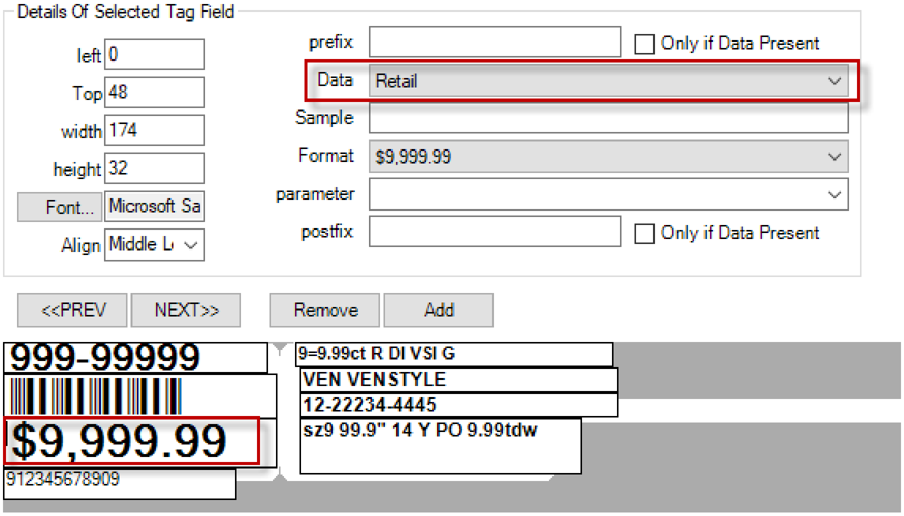
You can use the **Copy From…** option on any tab to import information from that tab of another category. You can also use the **Defaults** option to load default category information.

Editing Tag Fields

In the **Tags** tab, there is a preview of the tag and each field on it.

001-00001
$1,675.00
VS2/G/.87 CT/MQ
JAC 6546465ttr
xM-MYYxC-CCCx
14K W FL 0.08TW

Each field has its own set of details. Select a tag field and you'll see those details. In the example below, we've selected the field containing the `Retail` price of the item.



Details Of Selected Tag Field
left 0
Top 48
width 174
height 32
Font... Microsoft Sa
Align Middle L
prefix ☐ Only if Data Present
Data Retail
Sample
Format $9,999.99
parameter
postfix ☐ Only if Data Present

999-99999
$9,999.99
912345678909
9=9.99ct R DI VSI G
VEN VENSTYLE
12-22234-4445
sz9 99.9" 14 Y PO 9.99tdw

Use the **Details of Selected Tag Field** fields to change the data in each field. You can remove or add fields by using **Remove** or **Add** and work in the details fields to populate them.

Fields in the Details of Selected Tag Field Include:

Left	The margin for the left side of the tag field.
Top	The margin for the top of the tag field.
Width	The width of the tag field.
Height	The height of the tag field.
Font	The font to be used.
Align	The alignment (i.e., centered, left, or justified).

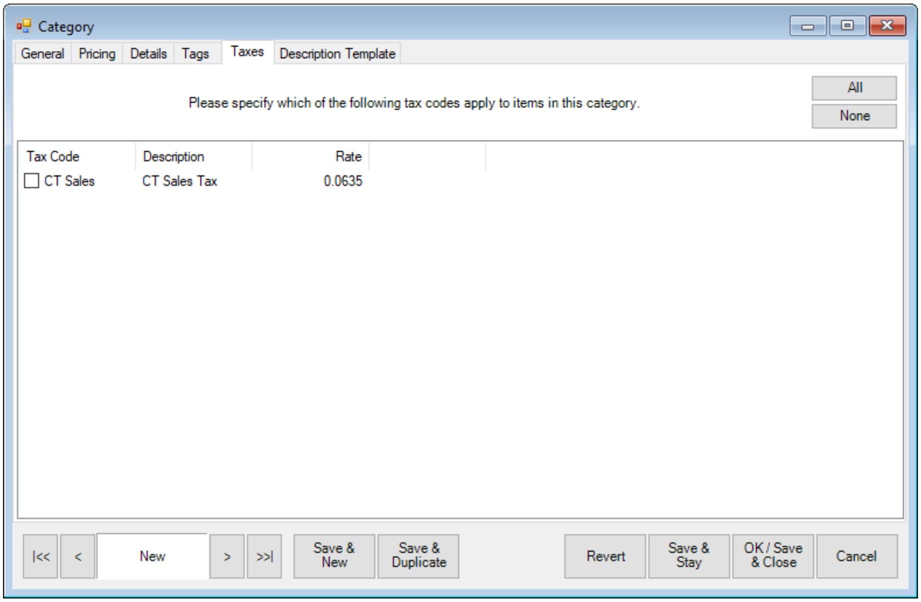
Prefix	Any text that should appear at the beginning of the field.
Only if Data Present	Indicates that the prefix should only appear if data is present. Otherwise, that part of the tag will be blank.
Data	Select the data to display in this field on the tag. Please note that in addition to our default choices, any details added on the **Detail** tab will appear as valid data choices. These can be found at the end of the list. Values for jewelry plan costs and cost plus retail can be selected. That serves as a starting point from which to explain care plan pricing to customers.
Sample	For the purposes of a preview on this screen, how data of that type might appear.
Format	For any particular data type, the format in which it should appear. For details on using letter codes or cost codes see the tip sheet entitled Tag Formats and Letter Codes at www.EdgeUser.com.
Parameter	Any additional information required in formatting the field, for example, the letters to be used in a cost code.
Postfix	Any text that should appear after the data.
Only if Data Present	Indicates that the postfix should only appear if data is present.

In addition to changing data, you can modify the positioning of fields on the tag with your mouse by clicking and dragging to its desired position or by using the arrow keys on your keyboard. Also, you can resize the fields on the tag. Move your mouse to the right side or bottom of the tag field. When your mouse cursor turns into a double arrow, click and drag to resize the field in the specified direction. This can be done with the keyboard by holding the shift key and using the arrow keys. See The Edge video tutorial library for demonstrations of this functionality:

- Inventory, Tag Layout, Basic: http://www.screencast.com/t/B1Errif1XOL
- Inventory, Tag Layout, Advanced: http://www.screencast.com/t/SFuqt3qfB.

If you are changing tag systems, you change tag layouts en masse. Contact The Edge Support Team for assistance.

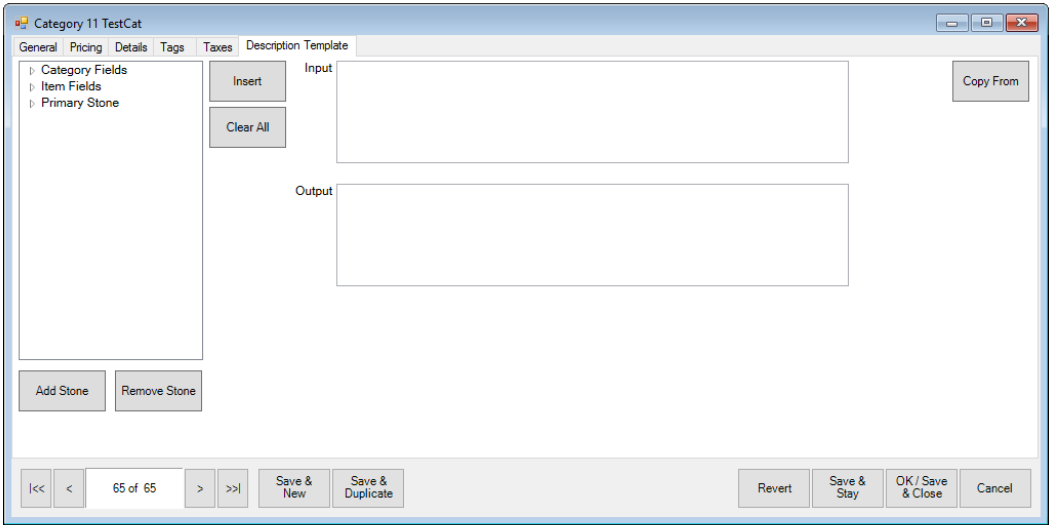
5. Complete the **Tags** tab fields as appropriate, and select the **Taxes** tab.



Please specify which of the following tax codes apply to items in this category.

Tax Code	Description	Rate
☐ CT Sales	CT Sales Tax	0.0635

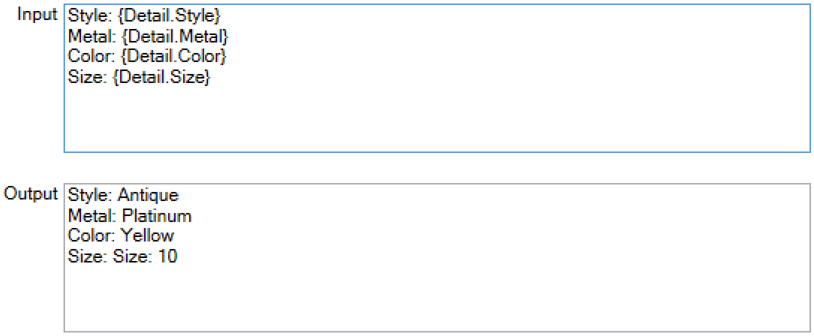
6. This tab is used in the event a category has taxes that are different from those of other items, such as one that is classified as a luxury item. These taxes can be selected from those shown here, which are defined in the **Administrative** menu. Setup of taxes is discussed in the section entitled Sales Tax.
7. Select applicable taxes from the **Taxes** tab if appropriate.
8. When you have completed tax information, you can select the **Description Template** tab. Note that basic data fields in the other tabs are required before you can continue with the **Description Template** tab.



Fields and options in the **Description Template** tab include:

Merge Fields	A list of data fields that can be used as variables in the description text. These will change according to the category. Click the top level to expand the field merge lists.
Insert	Use this to insert the selected merge field into the description text.
Clear All	Clears the entire description text. This cannot be undone.
Add Stone	Adds a stone to the merge fields with the same available variables as the primary stone so you can add descriptions for as many stones as you like.
Remove Stone	Removes the selected stone.
Copy From	Copies a category template from another template.

9. Use the **Description Template** tab to create a template to be used for items in this category when you enter them and select **Suggest** [description].
   a. Some data will always be pulled from the category record, such as the description. In this case, it is `Lady's Engagement Ring`.
   b. Use the merge fields on the left, which expand, to enter variable data that The Edge will populate based on specific item data. Click on a merge field, and it will appear in the **Input** and **Output** preview fields. In the **Input** field, enter text, punctuation, and carriage returns as desired around the merge fields.
   c. Continue adding fields and text until the description appears as desired in the **Output** field.



Input
Style: {Detail.Style}
Metal: {Detail.Metal}
Color: {Detail.Color}
Size: {Detail.Size}

Output
Style: Antique
Metal: Platinum
Color: Yellow
Size: Size: 10

   d. You can add stones using the **Add Stone** option or remove them using the **Remove Stone** option. For each stone you add, the stone variables will be available for that as well.

10. When all information has been entered in all the tabs, select the desired save option from the **Record Navigation Bar**.

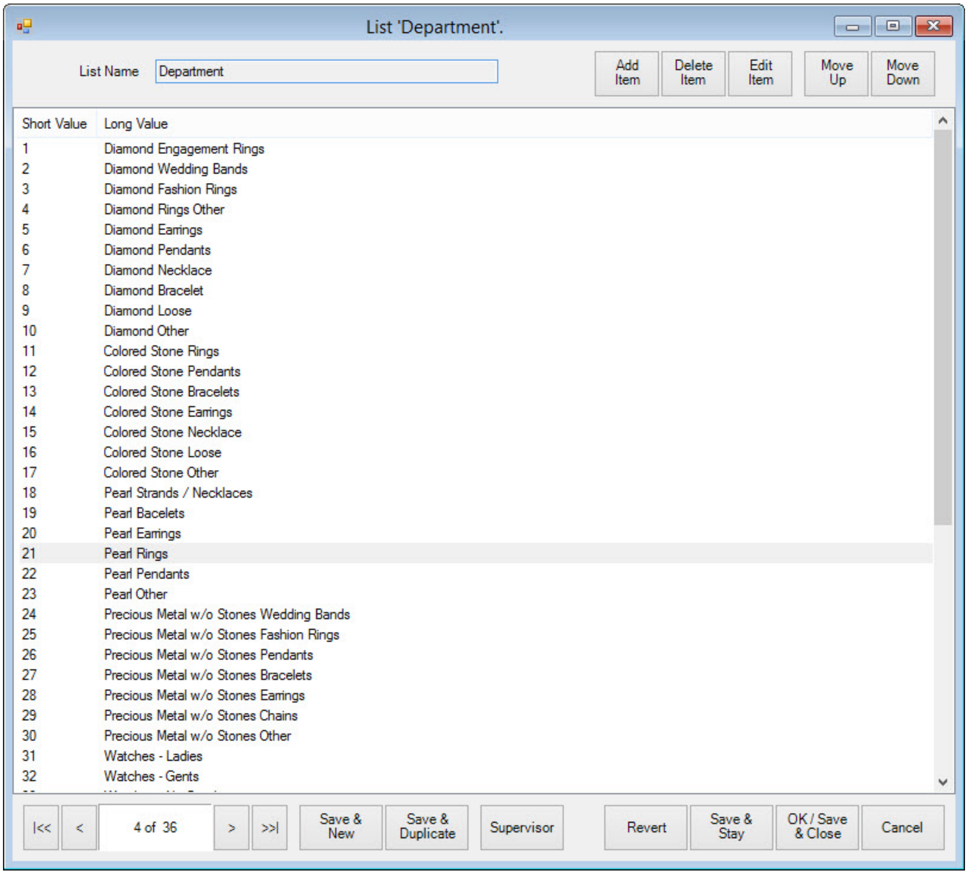
3.1.3 Departments

As an additional, optional way of grouping items and services, especially for reporting purposes, The Edge offers a department feature. Departments can include not only inventory (by category), but also repairs, appraisals, custom jobs, and miscellaneous sale lines. When enabled and used, the departments feature will enable department filter options in searches and reports.
Setting up departments does not work retroactively. Only those repairs, sales, appraisals, etc. completed after department setup will show up on the report.

3.1.3.1 Department Setup

Before you can populate departments, they must be set up as list items for use in various drop-down menus. To do so:

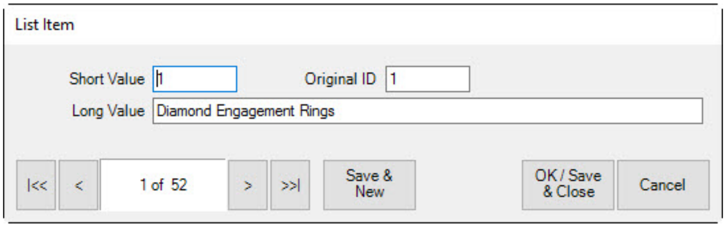
1. Select **Administrative ► Lists**. This will open the **List of Lists** window.
2. Open the **Department** list. The departments in the list will appear. These are departments that are available.



List Name: Department

Short Value	Long Value
1	Diamond Engagement Rings
2	Diamond Wedding Bands
3	Diamond Fashion Rings
4	Diamond Rings Other
5	Diamond Earrings
6	Diamond Pendants
7	Diamond Necklace
8	Diamond Bracelet
9	Diamond Loose
10	Diamond Other
11	Colored Stone Rings
12	Colored Stone Pendants
13	Colored Stone Bracelets
14	Colored Stone Earrings
15	Colored Stone Necklace
16	Colored Stone Loose
17	Colored Stone Other
18	Pearl Strands / Necklaces
19	Pearl Bacelets
20	Pearl Earrings
21	Pearl Rings
22	Pearl Pendants
23	Pearl Other
24	Precious Metal w/o Stones Wedding Bands
25	Precious Metal w/o Stones Fashion Rings
26	Precious Metal w/o Stones Pendants
27	Precious Metal w/o Stones Bracelets
28	Precious Metal w/o Stones Earrings
29	Precious Metal w/o Stones Chains
30	Precious Metal w/o Stones Other
31	Watches - Ladies
32	Watches - Gents

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



Short Value: 1
Original ID: 1
Long Value: Diamond Engagement Rings

Fields in the **List Item** window 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** window as needed and select **OK/Save & Close**.

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

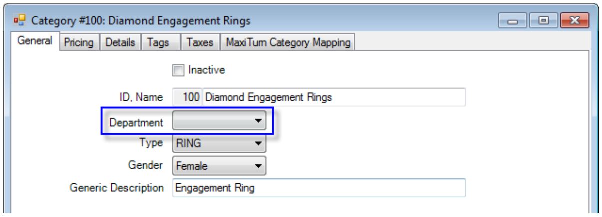
If you have no departments defined, where possible, recent versions of The Edge will automatically create departments based on your category setup. Your System Options will be modified to ensure default departments are created.

3.1.3.2 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.



☐ Inactive

ID, Name: 100 Diamond Engagement Rings

Department:

Type: RING

Gender: Female

Generic Description: Engagement 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 department in a miscellaneous sale line will override the default department system option assignment (if any).

To assign a miscellaneous sale line to a department:

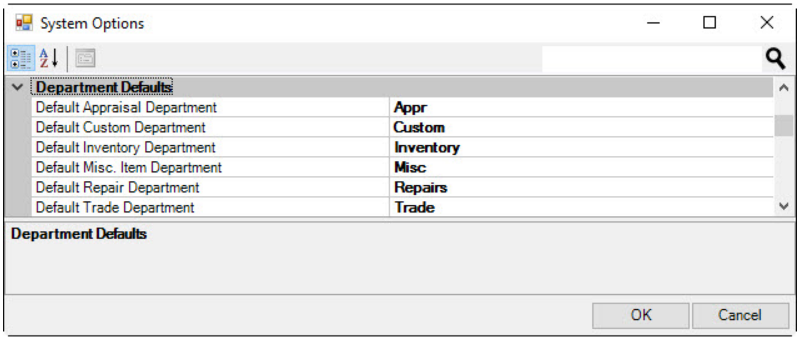
1. Select **Administrative ► Misc Sale Lines**.
2. Double click or edit the miscellaneous sale line you want to assign.
3. From the **Department** drop-down menu on the **General** tab, select the department to which you want this miscellaneous sale line assigned.
4. Select **OK/Save & Close**.

3.1.3.3 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.



Department Defaults

Default Appraisal Department	Appr
Default Custom Department	Custom
Default Inventory Department	Inventory
Default Misc. Item Department	Misc
Default Repair Department	Repairs
Default Trade Department	Trade

Department Defaults

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

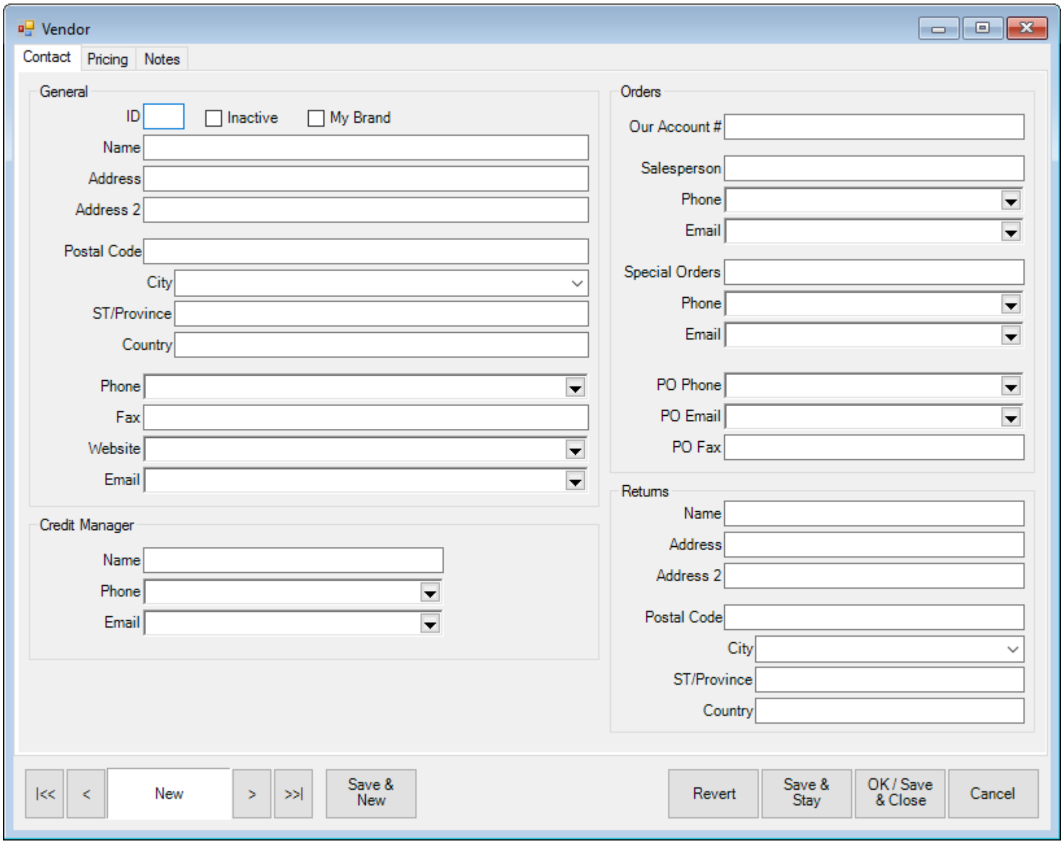
3.2 Vendors

Before an item can be accepted into the inventory database, certain data elements must be present. That includes a vendor record for the item.

3.2.1 Adding a Vendor

To add a new vendor to the system:

1. Select the **Vendors** ▶ **Add** from the **Inventory** menu. The **Vendor** window with the **Contact** tab selected will appear.



Fields and options in the **Contact** tab include:

General

ID	Enter an ID number for the vendor. It may be up to three characters and can contain letters and numbers.

Inactive	Indicates that the vendor is inactive. If it is, the vendor will not appear in list views.
My Brand	Indicates that the vendor is a store or company brand; you might use this most for items that you build or assemble in-house.
Name	The company name of the vendor.
Address	The address for the vendor.
Address 2	Additional address line for the vendor address.
Postal Code	The ZIP code for the vendor.
City	The city of the vendor.
State/Province	The state of the vendor.
Country	The country of the vendor.
Phone	The vendor's phone number
Fax	The vendor's fax number.
Website	The vendor's website.
Email	The vendor's email address.

Credit Manager

Name	The name of the credit manager for the vendor.
Phone	The direct phone number of the special order contact.
Email	The direct email of the special order contact.

Orders

Our Account #	Your account number with that vendor.
Salesperson	The name of your salesperson or other contact person with that vendor.
Phone	The direct phone number of your salesperson.
Email	The direct email of your salesperson.
Special Orders	The person to contact for special orders.
Phone	The direct phone number of the special order contact.
Email	The direct email of the special order contact.

Returns

Name	The name of the vendor contact for returns.
Address	The street address of the vendor contact for returns.
Address 2	The second line of the street address of the vendor contact for returns.
Postal Code	The postal code of the vendor contact for returns.
City	The city of the vendor contact for returns.

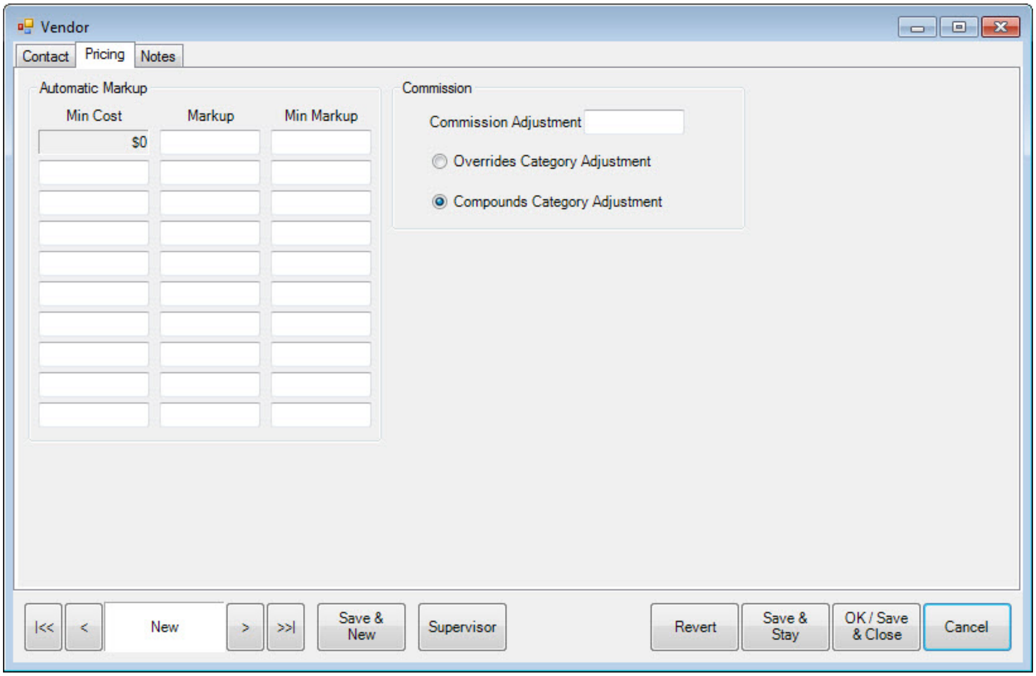
ST/Province	The state or province of the vendor contact for returns.
Country	The country of the vendor contact for returns.

2. Enter contact information for the vendor, including ID, name, address, telephone and fax numbers, website, email, account number, and contact information for your salesperson, special orders, and the credit manager. Select **My Brand** to indicate that the vendor record is one of your own; this is necessary for build and assemble items.

Only Vendor ID and Vendor Name are required. The remaining fields are optional.

3. Select the **Pricing** tab. The pricing tab will appear with a button that reads **See Pricing**.
4. Select **See Pricing** to enter pricing information.

Vendor pricing is not necessary for every vendor. This is only for vendors who have specific pricing rules that are different from those of the appropriate category. This option is offered as an alternative to creating a category for vendors who do have separate pricing rules.



Min Cost: $0

○ Overrides Category Adjustment

● Compounds Category Adjustment

Fields and options in the **Pricing** tab include:

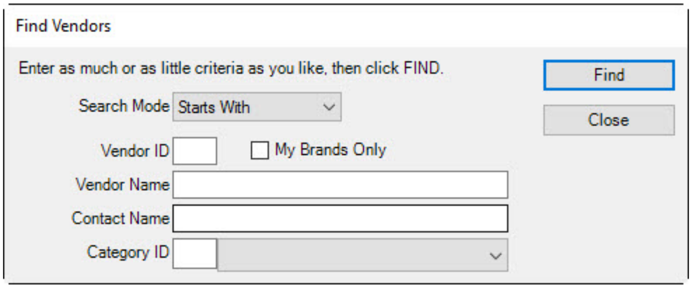
Automatic Markup	Enables you to associate a predefined markup with this vendor that will override the markup assigned in the category.
Commission Adjustment	Represents an adjustment paid to an associate for selling an item from this vendor. If you enter 75 percent, the commission will be reduced by 25 percent.
Overrides Category Adjustment	Whether this commission adjustment overrides the adjustment listed in the category record.
Compounds Category Adjustment	Whether this commission adjustment is figured on top of the adjustment in the category record.

5. Select the **Notes** tab to enter miscellaneous information about the vendor.
6. When all information has been entered, select a save option from the **Record Navigation Bar**.

3.2.2 Finding and Editing a Vendor

To find a vendor in The Edge:

1. Select **Vendors ► Find** from the **Inventory** menu. The **Find Vendors** window will appear.

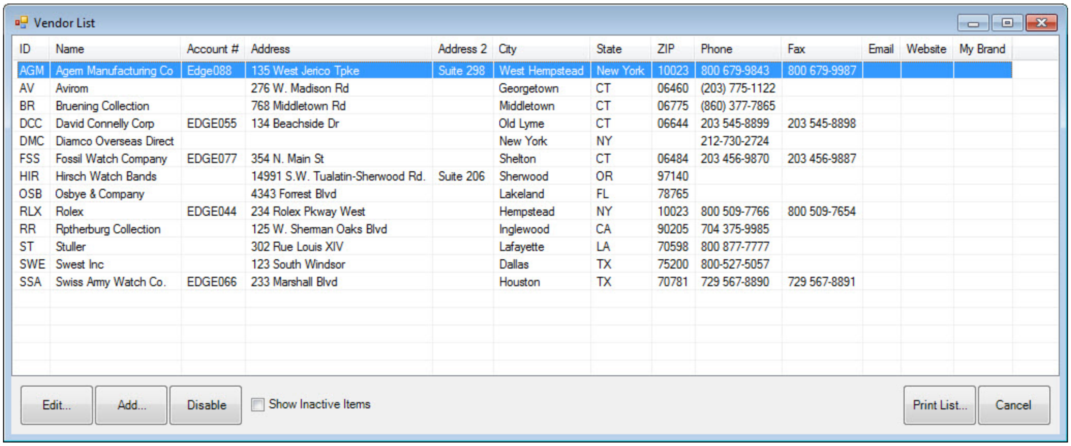


Find Vendors

Enter as much or as little criteria as you like, then click FIND.

Search Mode: Starts With

2. Search for a particular vendor by entering a **Vendor ID**, **Vendor Name**, **Contact Name**, or **Category ID**. The **Search Mode** field allows you to search for companies based on partial responses. For example, selecting **Starts With** in the **Search Mode** field and entering only the letter “a” in the **Vendor Name** field will find both Agem Manufacturing Co. and Avirom.
3. Select **Find**. The **Vendor List** window will appear.



ID	Name	Account #	Address	Address 2	City	State	ZIP	Phone	Fax	Email	Website	My Brand
AGM	Agem Manufacturing Co	Edge088	135 West Jerico Tpke	Suite 298	West Hempstead	New York	10023	800 679-9843	800 679-9987			
AV	Avirom		276 W. Madison Rd		Georgetown	CT	06460	(203) 775-1122				
BR	Bruening Collection		768 Middletown Rd		Middletown	CT	06775	(860) 377-7865				
DCC	David Connelly Corp	EDGE055	134 Beachside Dr		Old Lyme	CT	06644	203 545-8899	203 545-8898			
DMC	Diamco Overseas Direct				New York	NY		212-730-2724				
FSS	Fossil Watch Company	EDGE077	354 N. Main St		Shelton	CT	06484	203 456-9870	203 456-9887			
HIR	Hirsch Watch Bands		14991 S.W. Tualatin-Sherwood Rd.	Suite 206	Sherwood	OR	97140					
OSB	Osbye & Company		4343 Forrest Blvd		Lakeland	FL	78765					
RLX	Rolex	EDGE044	234 Rolex Pkway West		Hempstead	NY	10023	800 509-7766	800 509-7654			
RR	Rptherburg Collection		125 W. Sherman Oaks Blvd		Inglewood	CA	90205	704 375-9985				
ST	Stuller		302 Rue Louis XIV		Lafayette	LA	70598	800 877-7777				
SWE	Swest Inc		123 South Windsor		Dallas	TX	75200	800-527-5057				
SSA	Swiss Army Watch Co.	EDGE066	233 Marshall Blvd		Houston	TX	70781	729 567-8890	729 567-8891			

4. To edit a vendor record, open it and edit fields as described in the section entitled Adding a Vendor.

3.2.2.1 Change Vendor ID

When in the **Vendor Edit** window, the **Supervisor** menu contains a **Change ID** option.

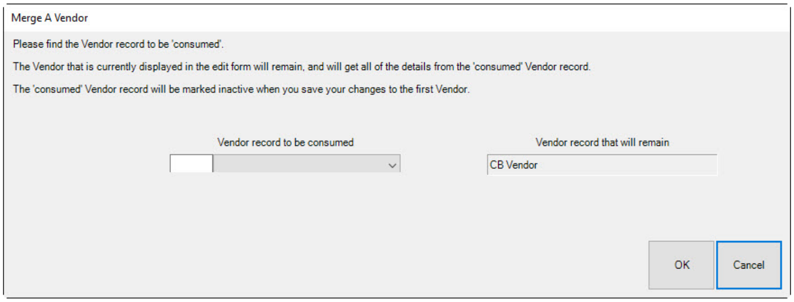
The **Change ID** option allows a supervisor to change the vendor's ID. This change may take a few minutes to finish as it requires changes to all affected items. To change a vendor's ID:

1. Perform a vendor find and select the vendor for which you want to change the ID.
2. Select **Enable Change Id** from the **Supervisor** menu. This will unlock the **ID** field on the vendor record.
3. Make the desired change to the vendor's ID.
4. Select one of the save options from the **Navigation** bar to finalize the change.

3.2.2.2 Vendor Merge

The **Vendor Edit** window contains a **Supervisor** button, which contains a **Merge** option. The **Merge** option allows a supervisor to combine two vendor records into one. The vendor record to be consumed will have all of its related data transferred to the vendor designated to remain. The consumed vendor record will then be marked inactive. Depending on the number of related records, a vendor merge could take a few minutes to complete as The Edge must make the appropriate changes to inventory and sales records. To merge vendor records:

1. Perform a vendor find and select the vendor record you wish to keep.
2. Select **Merge Vendors** from the **Supervisor** menu. The **Merge A Vendor** window will appear.



Merge A Vendor

Please find the Vendor record to be 'consumed'.

The Vendor that is currently displayed in the edit form will remain, and will get all of the details from the 'consumed' Vendor record.

The 'consumed' Vendor record will be marked inactive when you save your changes to the first Vendor.

Vendor record to be consumed:

Vendor record that will remain: CB Vendor

3. Use the **Vendor record to be consumed** filter to locate the vendor to merge into this one.
4. The default remaining vendor record is that which was selected.
5. Use the **Take** checkboxes to designate any data to be retained from the consumed vendor record.

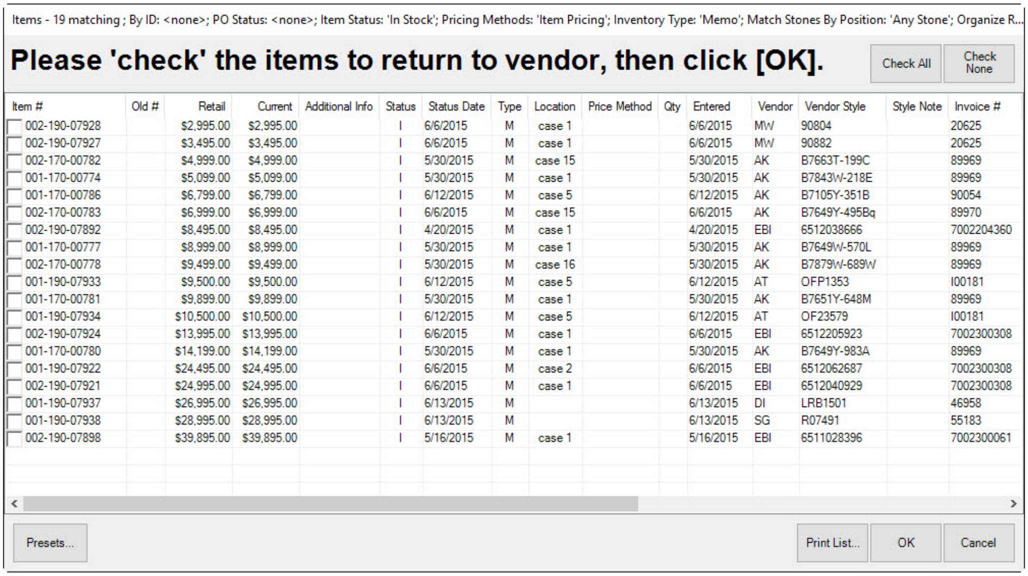
Vendor merge cannot be undone. Verify that you have selected the appropriate vendors before proceeding.

6. Select **OK**.
7. Select a save option to finalize the vendor merge.

3.2.3 Return Memo

The **Return Memo** function allows you to mark memo items as returned to vendor. This can also be done through the **Supervisor** menu on a specific item record.

1. Select **Return Memo** from the **Vendors** submenu.
2. Use the **Find Item** filter to find the items to return. The Edge will return a list of matching items.



Items - 19 matching ; By ID: <none>; PO Status: <none>; Item Status: 'In Stock'; Pricing Methods: 'Item Pricing'; Inventory Type: 'Memo'; Match Stones By Position: 'Any Stone'; Organize R...

Please 'check' the items to return to vendor, then click [OK].

Item #	Old #	Retail	Current	Additional Info	Status	Status Date	Type	Location	Price Method	Qty	Entered	Vendor	Vendor Style	Style Note	Invoice #
☐ 002-190-07928		$2,995.00	$2,995.00		I	6/6/2015	M	case 1			6/6/2015	MW	90804		20625
☐ 002-190-07927		$3,495.00	$3,495.00		I	6/6/2015	M	case 1			6/6/2015	MW	90882		20625
☐ 002-170-00782		$4,999.00	$4,999.00		I	5/30/2015	M	case 15			5/30/2015	AK	B7663T-199C		89969
☐ 001-170-00774		$5,099.00	$5,099.00		I	5/30/2015	M	case 1			5/30/2015	AK	B7843W-218E		89969
☐ 001-170-00786		$6,799.00	$6,799.00		I	6/12/2015	M	case 5			6/12/2015	AK	B7105Y-351B		90054
☐ 002-170-00783		$6,999.00	$6,999.00		I	6/6/2015	M	case 15			6/6/2015	AK	B7649Y-495Bq		89970
☐ 002-190-07892		$8,495.00	$8,495.00		I	4/20/2015	M	case 1			4/20/2015	EBI	6512038666		7002204360
☐ 001-170-00777		$8,999.00	$8,999.00		I	5/30/2015	M	case 1			5/30/2015	AK	B7649W-570L		89969
☐ 002-170-00778		$9,499.00	$9,499.00		I	5/30/2015	M	case 16			5/30/2015	AK	B7879W-689W		89969
☐ 001-190-07933		$9,500.00	$9,500.00		I	6/12/2015	M	case 5			6/12/2015	AT	OFP1353		I00181
☐ 001-170-00781		$9,899.00	$9,899.00		I	5/30/2015	M	case 1			5/30/2015	AK	B7651Y-648M		89969
☐ 001-190-07934		$10,500.00	$10,500.00		I	6/12/2015	M	case 5			6/12/2015	AT	OF23579		I00181
☐ 002-190-07924		$13,995.00	$13,995.00		I	6/6/2015	M	case 1			6/6/2015	EBI	6512205923		7002300308
☐ 001-170-00780		$14,199.00	$14,199.00		I	5/30/2015	M	case 1			5/30/2015	AK	B7649Y-983A		89969
☐ 001-190-07922		$24,495.00	$24,495.00		I	6/6/2015	M	case 2			6/6/2015	EBI	6512062687		7002300308
☐ 002-190-07921		$24,995.00	$24,995.00		I	6/6/2015	M	case 1			6/6/2015	EBI	6512040929		7002300308
☐ 001-190-07937		$26,995.00	$26,995.00		I	6/13/2015	M				6/13/2015	DI	LRB1501		46958
☐ 001-190-07938		$28,995.00	$28,995.00		I	6/13/2015	M				6/13/2015	SG	R07491		55183
☐ 002-190-07898		$39,895.00	$39,895.00		I	5/16/2015	M	case 1			5/16/2015	EBI	6511028396		7002300061

3. Select the items to be returned.
4. Select OK. They will be taken out of inventory and a confirmation window will appear.

In QuickBooks, an item with stock type `memo` that has a payable date is accounted for as owned stock merchandise. These items have been sold and posted to the Memo Payments due account. For more information, see the section entitled QuickBooks Inventory Tab.

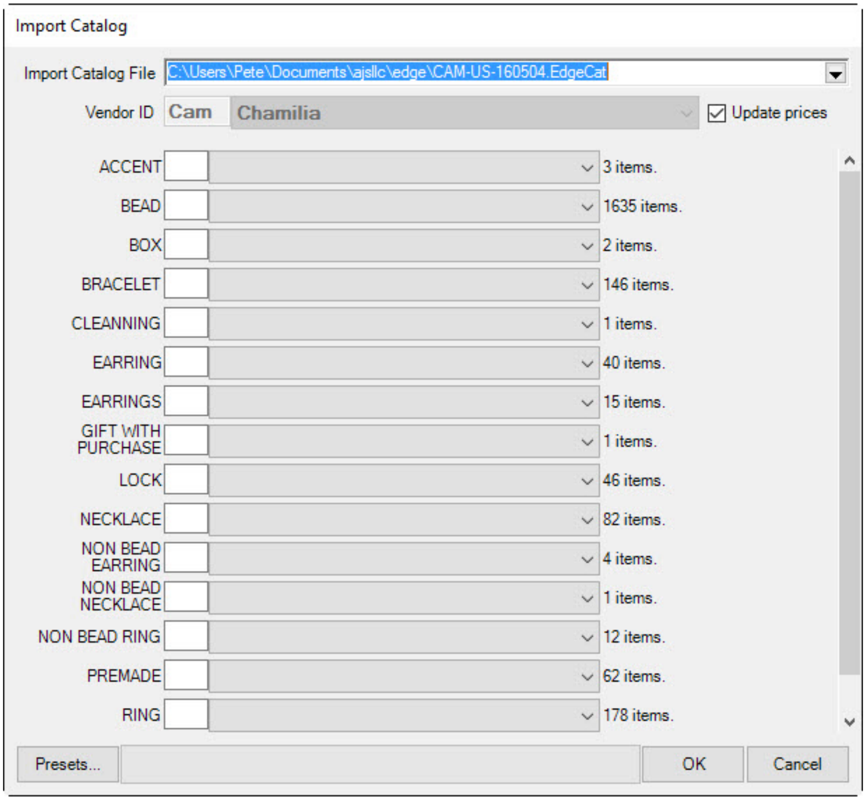
3.2.4 Importing Vendor Catalog Files

The Edge supports the importation of vendor catalog files. When imported, the catalog file does not create new in-stock items, but rather provides data about a particular vendor style for quick entry when the real items are ordered or entered. For a list of catalog files along with download links, please visit our user website (www.edgeuser.com) and click on **Downloads ► Catalog Downloads**. It may be necessary to add a vendor record for the vendor whose catalog you are importing.

To import a vendor catalog:

1. Make sure The Edge is idle and no POS transactions or inventory entries are in progress.
2. From the server device, download the appropriate catalog file from our website (www.edgeuser.com).
3. Make a note of where you save the file.
4. Select **Inventory ► Vendor ► Load Catalog**.

5. From the **Import Catalog File** drop-down menu, choose the catalog file you downloaded from our site.
6. If this is your first time loading a catalog from this vendor, you must assign categories so the system knows where to import. Once assigned, the system will automatically populate these fields when you do your next import for this vendor.
7. If this is the first time loading a catalog for this vendor, you will need to choose which of your vendors to match it to with the Vendor ID dropdown. This will fill in automatically if you have imported previously.
8. Check **Update Prices** if you want the catalog import to update pricing on existing items from this vendor. This will only work if your vendor style numbers exactly match those used by the vendor.
9. Select **OK** to begin the import. The **Import Catalog** window will appear with groups of items from the vendor list.



Import Catalog

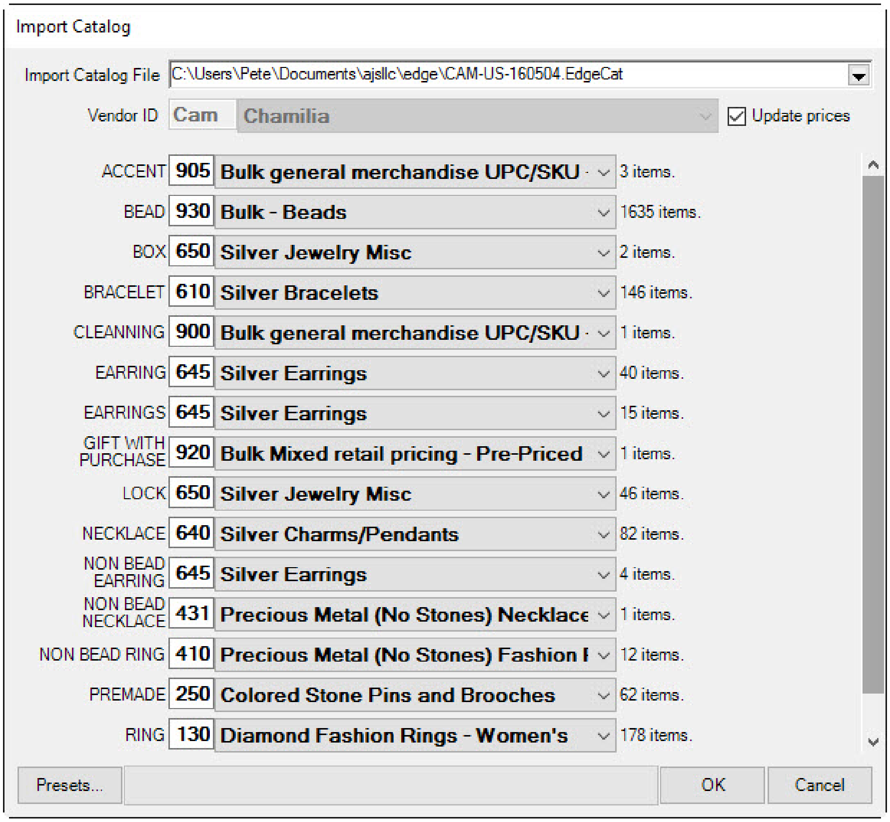
Import Catalog File C:\Users\Pete\Documents\ajsllc\edge\CAM-US-160504.EdgeCat

Vendor ID Cam Chamilia

☑ Update prices

ACCENT	3 items.
BEAD	1635 items.
BOX	2 items.
BRACELET	146 items.
CLEANNING	1 items.
EARRING	40 items.
EARRINGS	15 items.
GIFT WITH PURCHASE	1 items.
LOCK	46 items.
NECKLACE	82 items.
NON BEAD EARRING	4 items.
NON BEAD NECKLACE	1 items.
NON BEAD RING	12 items.
PREMADE	62 items.
RING	178 items.

10. For each group, assign an Edge category.



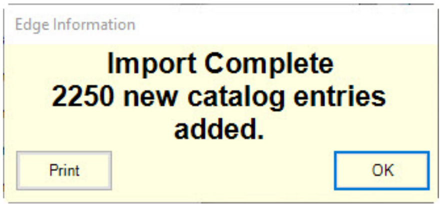
Import Catalog

Import Catalog File: C:\Users\Pete\Documents\ajsllc\edge\CAM-US-160504.EdgeCat

Vendor ID: Cam Chamilia ☑ Update prices

ACCENT	905	Bulk general merchandise UPC/SKU ·	3 items.
BEAD	930	Bulk - Beads	1635 items.
BOX	650	Silver Jewelry Misc	2 items.
BRACELET	610	Silver Bracelets	146 items.
CLEANNING	900	Bulk general merchandise UPC/SKU ·	1 items.
EARRING	645	Silver Earrings	40 items.
EARRINGS	645	Silver Earrings	15 items.
GIFT WITH PURCHASE	920	Bulk Mixed retail pricing - Pre-Priced	1 items.
LOCK	650	Silver Jewelry Misc	46 items.
NECKLACE	640	Silver Charms/Pendants	82 items.
NON BEAD EARRING	645	Silver Earrings	4 items.
NON BEAD NECKLACE	431	Precious Metal (No Stones) Necklace	1 items.
NON BEAD RING	410	Precious Metal (No Stones) Fashion I	12 items.
PREMADE	250	Colored Stone Pins and Brooches	62 items.
RING	130	Diamond Fashion Rings - Women's	178 items.

11. Select **OK**. The items will be entered for easy reference when ordering.



Edge Information

Import Complete
2250 new catalog entries added.

12. Do this process on the server for each store.

3.3 Items

The Edge is built around a simple concept. Enter all items into inventory as they arrive at the store, and use the system's functions to sell them, alter them, return them for credit, scrap them, etc. The Edge will know who bought the item, who sold it, when it was sold, and for how much it sold. In the process, it will build a customer database, calculate commissions when applicable, recommend items for reorder, and more.

When entering an item for the first time, it is essential to tell The Edge what category the item belongs to during the entry process. If an item has been previously entered into the system, entering the vendor ID and style number or scanning the vendor's barcode will automatically return details from a previously entered item. Some fields are mandatory and must be present before The Edge will accept an item into the system. The **Items** menu allows you to quickly and easily add and locate specific items in your store.

When adding an item, the first thing to consider is category, which allows you to categorize items by type and style, but not vendor or brand, so you can see what kinds of items perform well. For more about categories, go to the section in The Edge Online Help entitled Categories (http://docs.edgeuser.com/NetHelp/Documents/categories.htm). For more about how The Edge's inventory management features can help you maximize profits, see the video at https://www.screencast.com/t/LjGscxKzaR.

The second is pricing method, which is what we will discuss in detail in this section.

Based on the discussion above, you can see that when you receive an item, the first thing you should do is consider two things:

1. To what category does it belong?
2. What pricing method should it have?

Selecting the Category

A category is a collection of related items (i.e., chains, charms, diamond bracelets, colored stone rings, giftware, etc.) that The Edge will use as a foundation in producing management reports. Assigning items to categories will assist you in discovering which categories are producing the most revenue and which price points are most productive within the categories.

The Edge comes with default, recommended categories. Though there may be reasons to vary a bit, we strongly encourage that you use the category structure provided with The Edge. It will provide best use of analytical tools and better organization of items. For a video tutorial about working with inventory filters, go to http://www.screencast.com/t/ICQVlzwB.

Selecting the Pricing Method

The Edge provides five ways to price items:

- Fine-item pricing, which allows you to track individual pieces from purchase to sale to a retail customer.
- Bulk item pricing, of which there are four types, whereby we are tracking quantities of the same style of item until retail sale to a customer and an individual sold instance of that item is created.

In The Edge, all items are assigned a pricing method. The most common pricing method in The Edge is fine jewelry, individual item pricing. This method assigns each item its own unique inventory SKU even if the style has previously been in inventory. By individually tracking items, The Edge is able to report very precisely.

Single-item pricing is not appropriate for all types of inventory, particularly those merchandise lines that are low cost and carried in great quantity. Always use a bulk category when the merchandise cannot be physically tagged. These types of items should be entered as bulk inventory. Bulk inventory allows you to create a single inventory SKU and have it carry a quantity that can be replenished. Like single items, bulk items can also fulfill special orders, be placed on a purchase order, managed as fast sellers, etc.

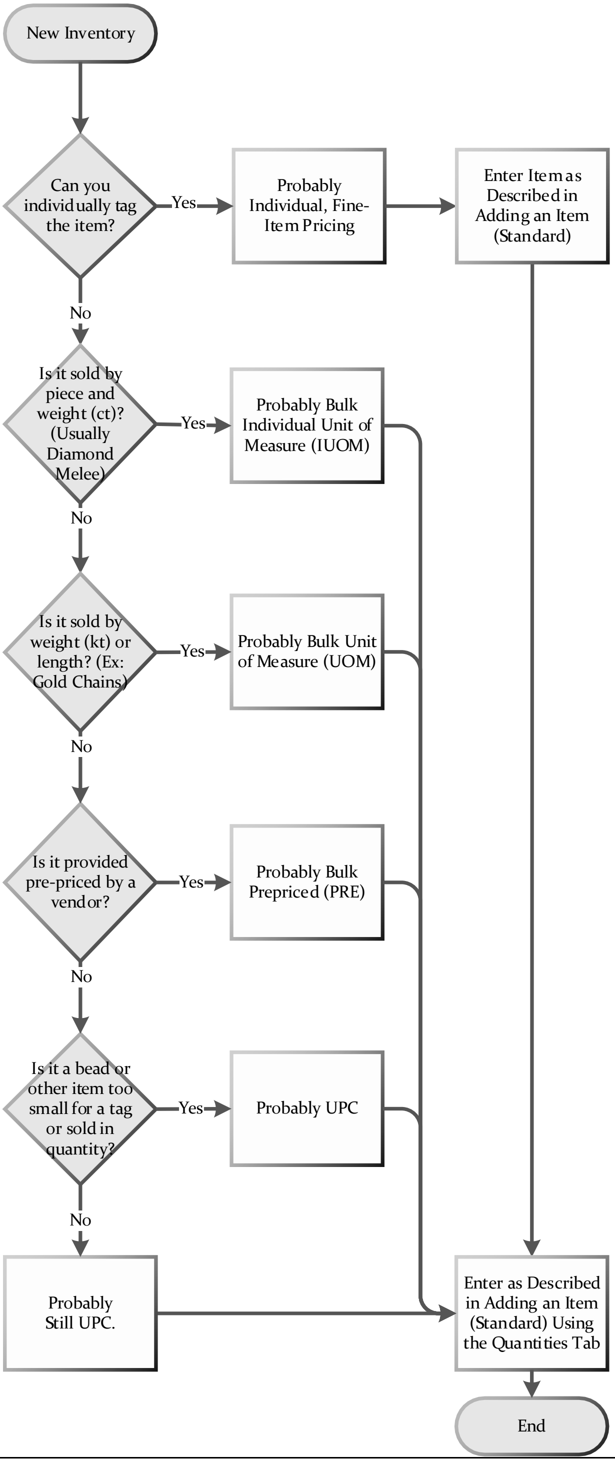
In The Edge, bulk item pricing is the exception rather than the rule. But the good news is that The Edge manages all these types of records for you, ensuring accurate transaction records.

Types of Bulk Inventory

There are four types of bulk inventory pricing methods:

General Merchandise, UPC/SKU	Appropriate when an item is carried in quantity and carries the same cost and price each, e.g., charms, batteries, and bead lines.
Buy and Sell Item by Unit of Measure, IUOM	Appropriate when an item is carried in quantity that includes a physical count and a measure and sold per measure, e.g., melee diamond parcels, especially larger stones (.05 ct. and larger) that would be sold individually.
Buy and Sell by Measure Only, UOM	Appropriate when an item is carried in measure and sold per measure, e.g., gold stock or smaller diamond melee that is sold as several stones.
Mixed Retail Pricing, PRE	Appropriate when an item represents a group of like-items of differing costs and prices but consistent markup, e.g., watchbands.

Here is a decision tree to help you decide how to price an item in The Edge.


New Inventory
Can you individually tag the item?
Yes
Probably Individual, Fine-Item Pricing
Enter Item as Described in Adding an Item (Standard)
No
Is it sold by piece and weight (ct)? (Usually Diamond Melee)
Yes
Probably Bulk Individual Unit of Measure (IUOM)
No
Is it sold by weight (kt) or length? (Ex: Gold Chains)
Yes
Probably Bulk Unit of Measure (UOM)
No
Is it provided pre-priced by a vendor?
Yes
Probably Bulk Prepriced (PRE)
No
Is it a bead or other item too small for a tag or sold in quantity?
Yes
Probably UPC
No
Probably Still UPC.
Enter as Described in Adding an Item (Standard) Using the Quantities Tab
End

3.3.1 Bulk Records: Behind the Scenes

The Edge can manage bulk inventory records with the same precision as individual records and yet still allow you to avoid creating item records for each piece. How does this work?

Bulk records are structured in three levels:

Bulk Master	Bulk master records are typically based on the vendor style number and provide management of that item regardless of status and quantity.
Bulk Quantity	Bulk quantity records are a subset of bulk master records, but are based on shipments. For example, if you receive 10 of a particular bulk item, a bulk quantity record is created.
Instance	Bulk instance records are created when a bulk item is sold or otherwise used individually. Creation of an instance record depletes the quantity record for that item. Instance records are very much like non-bulk, fine-item records.

To add a new bulk item, you're really creating a new master record. After that, to replenish, we recommend using **Add by Invoice** and typing the style number of the existing bulk master and updating the quantities in the **Quantities** tab. Then, as you work with each piece, The Edge will create an instance record for that transaction.

3.3.2 Adding an Item (Standard)

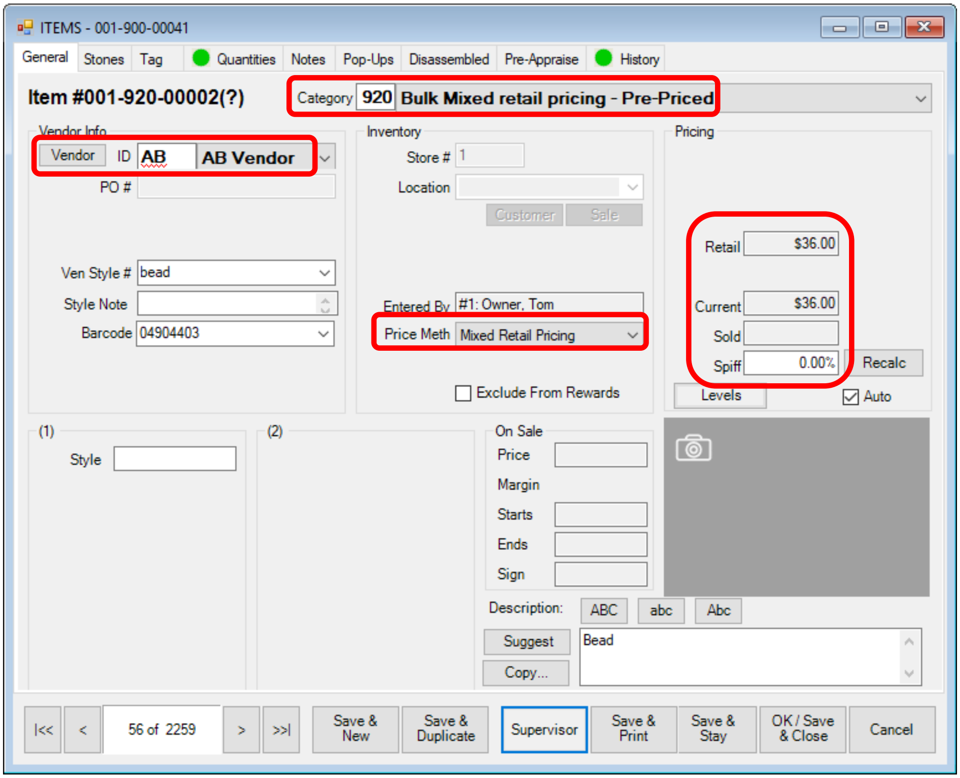
The Edge can record a tremendous amount of information about an individual piece. You need not use all these fields, but they can be helpful in tracking and reporting on transactions.

Adding an item can also be done in the Receive Invoice process. See the section entitled Add Item from Invoice.

To add a new item to your inventory from scratch:

1. Select **Inventory ► Item ►Add**. The **New Item** window will appear with the **General** tab open.

   Primary to an item record are four data fields:
   - Category
   - Vendor
   - Pricing method
   - Price.



Item #001-920-00002(?)

Category 920 Bulk Mixed retail pricing - Pre-Priced

Vendor ID AB AB Vendor

PO #

Store # 1

Location

Ven Style # bead

Style Note

Barcode 04904403

Entered By #1: Owner, Tom

Price Meth Mixed Retail Pricing

☐ Exclude From Rewards

Retail $36.00

Current $36.00

Sold

Spiff 0.00%

☑ Auto

Style

Price

Margin

Starts

Ends

Sign

Description: Bead

56 of 2259

An important feature of the **New Item** window is that once you select a category, the details defined by the **Details** tab of that category will appear. See the section entitled Categories.

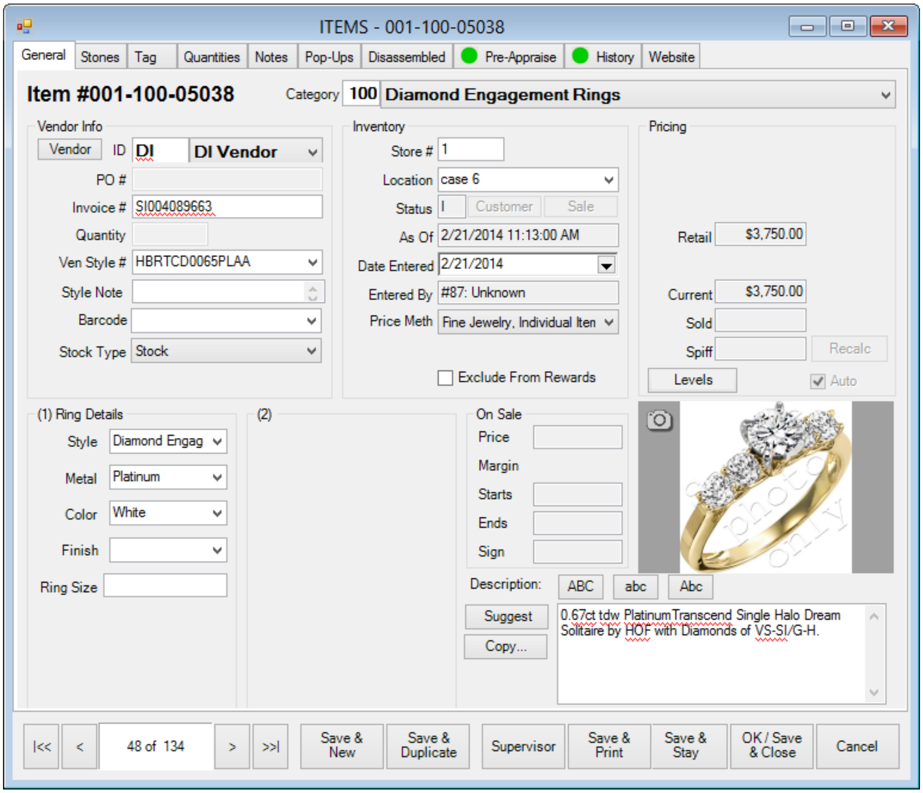
2. Complete the tabs as described in the sections that follow.
3. If the item has been in your inventory before, when you enter the vendor and vender style number, you will be prompted to copy the details from the previous record.
4. Do so or enter the data manually.
5. If the item is in response to a purchase order, associated with a special order, it is a bulk item, or if you have a multistore environment, the **Allocate** window will appear. Allocate the items as described in the section entitled Allocating Items.
6. Select **OK/Save & Close**.

Important!

For bulk items, verify that the correct pricing method shows on the item record.

3.3.2.1 Item General Tab

The **General** tab is the tab to which an item record will open from **Inventory ► Items ► Find** as described in the section entitled Finding and Editing an Item.



Item #001-100-05038

Category: 100 Diamond Engagement Rings

ID: DI — DI Vendor

PO #:

Invoice #: SI004089663

Quantity:

Ven Style #: HBRTCD0065PLAA

Style Note:

Barcode:

Stock Type: Stock

Store #: 1

Location: case 6

Status: I

As Of: 2/21/2014 11:13:00 AM

Date Entered: 2/21/2014

Entered By: #87: Unknown

Price Meth: Fine Jewelry, Individual Iten

☐ Exclude From Rewards

Retail: $3,750.00

Current: $3,750.00

Sold:

Spiff:

☑ Auto

Style: Diamond Engag

Metal: Platinum

Color: White

Finish:

Ring Size:

Description: 0.67ct tdw Platinum Transcend Single Halo Dream Solitaire by HOF with Diamonds of VS-SI/G-H.

Fields and options in the **General** tab include:

Category	The inventory category to which the item belongs. Entering a numeric category ID or spelling part of the category name will reduce lookup time. Categories must be defined prior to entering inventory items. For more information, see the section entitled Adding a Category.
Vendor Info	

Vendor ID	The vendor ID is a character string up to three positions in length used to identify each supplier of inventory items in the system. Vendor IDs must be predefined before an item can be entered. A drop-down list of all vendors is part of this entry function. **The vendor record can be brought up immediately by selecting Vendor from the Vendor Info area.**
PO#	The purchase order number, if any, on which this item was received.
Invoice #	Optional. The invoice number corresponds to the number on the invoice from the vendor. This field is not required, but we strongly recommend its use. For convenience, The Edge will retain the first invoice number you enter under the assumption that subsequent added items are on that same invoice. This will continue until you change the invoice number again or stop entering inventory.
Quantity	Optional. **Quantity** allows you to create many inventory items with one entry. For example, if there are five herringbone chains exactly alike, you would only have to enter the 5 into the **Quantity** field to create five unique inventory records. The Edge will default to 1 if the field is skipped.
Ven Style #	This is the vendor's unique style number. Enter it exactly as it appears on the invoice. This field has the same use as the barcode field with regard to subsequent entries for this item. As soon as the system detects that the same style number was entered previously, it will offer to complete the values accordingly. Changes may be made or the item can be accepted just as it was recalled from its previous entry.
Style Note	Text added to the style number that will help identify the item. For example, it might be stone type, size, etc.
Barcode	Optional. If the item being entered into inventory has a barcode tag on it, scanning it while the cursor is in this field will result in the barcode being stored with this record. The manufacturer's barcode can then be used in the system for identifying the item in the same way as the system-generated barcode can. It can be used to scan the subsequent entries of this item into inventory, saving time and minimizing mistakes.

Stock Type	This indicates how the item was acquired. Values include: **S** Stock **M** Memo **C** Consignment O Special Order **T** Trade-in **V** Catalog Entry **F** Faux model **L** Live model **A** Assembled **P** Takeoff (i.e. disassembled part).

Inventory

Store #	Multi-store only. The ID of the store where the item is located.
Allocate	When entering new inventory, especially in a quantity greater than one, this option allows you to split that quantity among stores and/or allocate inventory to outstanding special orders. Under certain circumstances, this option activates automatically.
Location	Optional. This represents a location in the store. It may be a case, a window display, or the safe. It is helpful for quickly detecting missing items by monitoring the item counts per case. Security permissions are required.

Status	Indicates the current status of the item. For a new item, it will always be `I` for in stock. Values include: **I** In stock **L** On Layaway **S** Sold **A** Memo Out **V** Returned to Vendor **M** Missing **D** Disassembled **U** Consumed here (i.e. as a part) Consumed gone (no status letter, determined by sold or in stock) **X** Scrapped **G** Giveaway **N** Donation **W** Work in Progress **C** Cancelled. Purchase Order Statuses: **Q** Queued **E** Entered **B** Backordered **O** On Order **C** Cancelled.
Customer	If the item is sold, this returns the customer record of the purchaser.
Sale	If the item is sold, this returns the sale record.
As Of	When the status indicated above was recorded.
Entered	Date when the item first became an item. This defaults to the current day if left blank.
Entered By	Associate who entered the item.
Price Method	Determined by the type of item. The default is `Fine Jewelry, Individual Item Pricing`. Other pricing methods apply to bulk inventory. For more about bulk inventory, see the section entitled Bulk Inventory.
Exclude from Rewards	Indicates that sale of the item should not count toward rewards.
Pricing	These fields detail pricing at both cost and margin.
Cost	This field is the cost of a purchased item. Enter cost with two decimal places.

Re-cost	The **Re-Cost Item** feature allows you to track and change the replacement cost of an inventory item, for reference and planning purposes, without affecting the actual cost paid. This way, a retailer can consider what the cost of an inventory item would be if they purchased it again.
Re-Cost DT	The date the re-costing was performed.
Retail	This field will be primed with the calculated retail price as determined by the values in the category record or an overriding vendor record. The margin field immediately to the right of the retail price shows the amount of profit full price would result in.
Lowest	This field will be automatically generated when required values are present in the category record. The system will not allow items to be sold for less than this price without authorization. The margin field to the right of this field shows the percentage of profit realized if the item is sold at this price.
Current	The currently listed price of the item. This may vary from retail for a few reasons, including the item being on sale or taking part in an automatic markdown.
Sold	The price at which the item sold.
Spiff	Spiff is an incentive applied to an item to encourage the sales staff to sell this item. The spiff is represented as a percentage of profit generated on the sale of the item. It is a good technique for getting rid of unwanted items. Spiffs can be applied one by one (on the item record) or the system can automatically spiff items that meet a certain criteria on the **Pricing** tab as described in the section entitled Adding a Category.

If you pay commissions, the greater of the values will be paid, but not both.

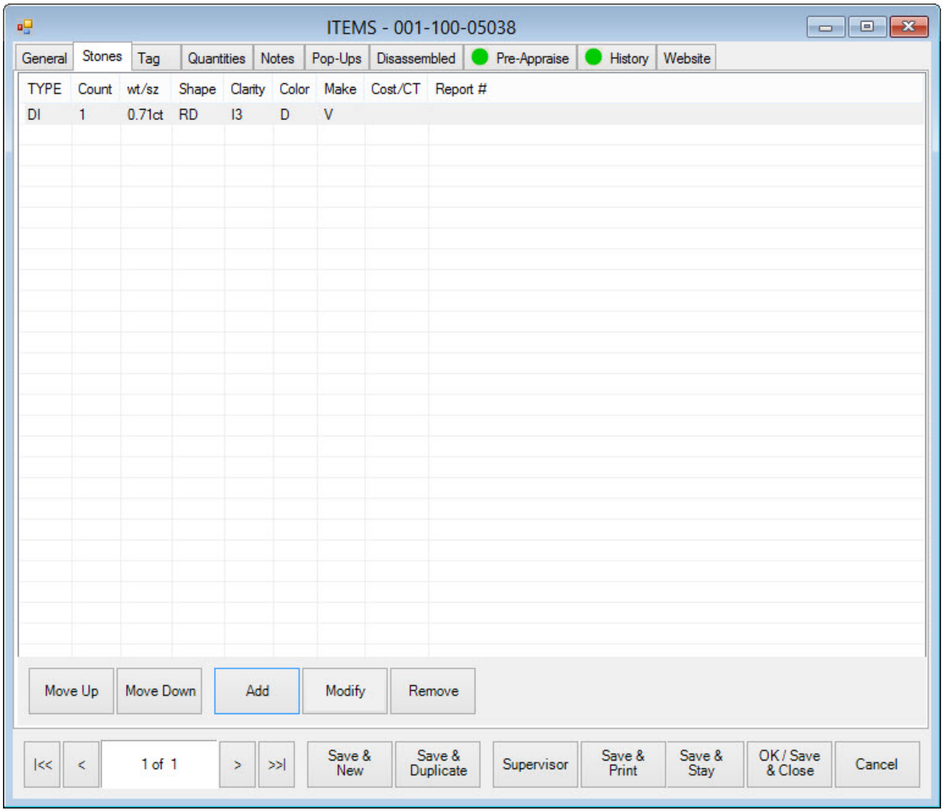
Levels	Allows you to manage the minimum and maximum quantity of the item. For more information, see the section entitled Inventory Levels. Later, when editing the item record, if there are levels set, this button will be green.
Auto	Indicates this item is subject to automatic repricing. By default, all new items have this flag checked. This is to assist you in managing aged inventory.
On Sale	The fields that follow deal with sale pricing.
Price	If the item is on sale, the sale price.
Margin	If the item is on sale, the margin based on the sale price.
Starts	When the sale price takes effect.
Ends	When the sale price is no longer valid.
Sign	Indicates the in-case sign used to advertise the sale.

Camera icon (📷)	Returns photo menu to capture an image of the item as described in the section entitled Adding and Managing Photos.
Description	Allows you to enter a description of the item. The **Suggest** option will construct a description based on the category data, the **Stones** tab, the category's description template, and the options selected for the item to date. It can be edited from there.

Fields that appear in the General tab vary according to the item type.

3.3.2.2 Item Stones Tab

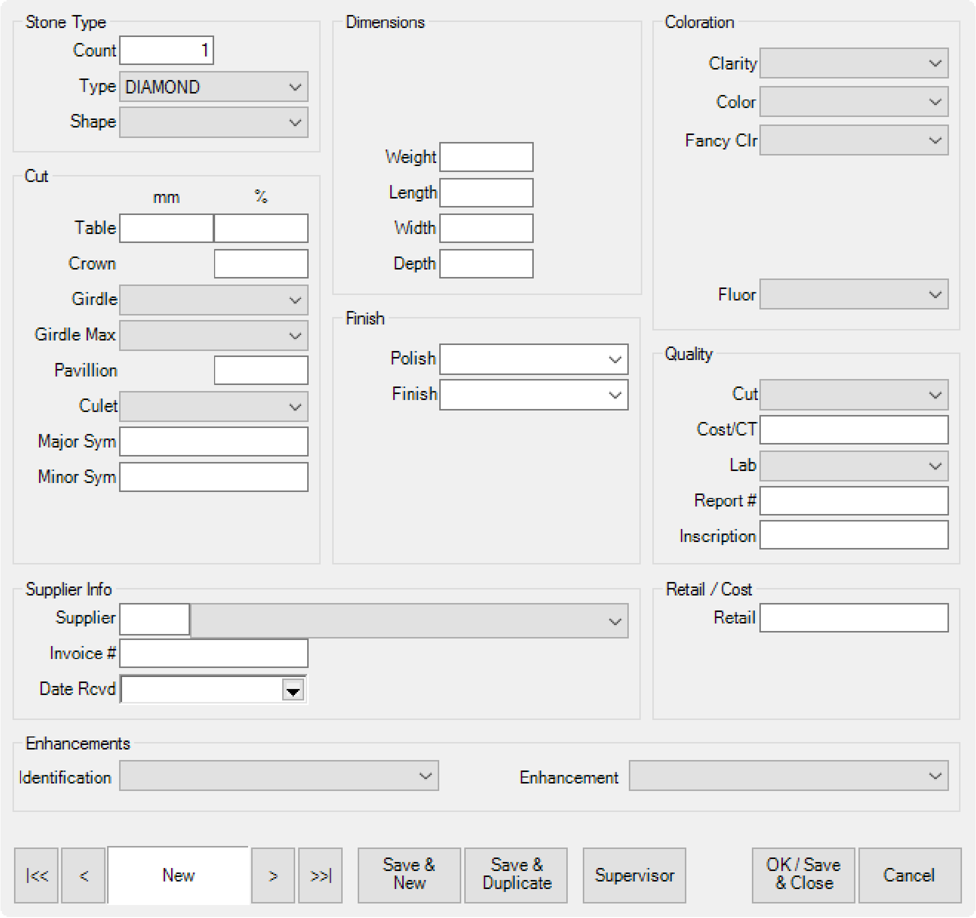
The **Stones** tab contains a record of stone details for each stone in a piece.



TYPE	Count	wt/sz	Shape	Clarity	Color	Make	Cost/CT	Report #
DI	1	0.71ct	RD	I3	D	V		

To add a stone record to an item:

1. Select **Add**. The **Add Stone** window will appear.


Count 1

Type DIAMOND

Notice that once you've selected a type of stone, pertinent data fields will appear. Fields vary based on the stone type. Values available in each drop-down menu are managed in system lists. For more information, see the section entitled Lists.

2. Complete the stone fields as needed.

To change the stone data for an item, double-click on the stone record in the item record.

The Edge software is sensitive to the value and importance of maintaining detailed stone information when necessary. Detailed gemological information can be maintained by the software, but it is not always essential. You may enter the information needed to satisfy your purposes.

The Edge will prepare an appraisal using the data supplied in the inventory record as an option. It is in your best interest to provide as much information as possible for items that you anticipate will require an appraisal after selling them.

The Edge will also produce reports by gemstone type. It is important that the **Stone** tab be used for describing the gems in most pieces to a minimal degree anyway. The order of the stones is significant to the software. Stones are normally entered in the order of significance in the piece. The first stone entered would be the center stone, the second stone entered would be the side stone, and so on. The **Stones** tab has function buttons that will enable the user to readily reorder stones if necessary.

The following dataset is provided as a default. However, this information can be customized via the lists built into The Edge. See the section entitled Lists for information on managing these lists.

3.3.2.2.1 Diamond

The Edge will provide you with all the data elements required to describe all known gemstones. You may choose to use as many or few of these data elements as you deem necessary for describing the product being entered.

Stone Type		
	Count	A count of the stones to which all characteristics apply.
	Type	The type of stone (e.g., diamond when entering a diamond).
	Shape	The shape of the stone (e.g., round, marquis, pear, etc.).
Dimensions		
	Varied	If stone weights are varied, the system will prompt you to enter minimum and maximum weights.
	TWT	Total weight of all the stones.
	Weight	The weight of a single stone or the total weight of all stones in a group.
	Length	Measurement of the stone's length in MM.
	Width	Measurement of the stone's width in MM.
	Depth	Measurement of the stone's depth in MM.
Cut		
	Table mm	A measurement of the table size in MM.
	Table %	Table size as a percentage of diameter.
	Crown %	Degrees in the crown angle.
	Girdle	Smallest girdle measurement.
	Girdle Max	Largest girdle measurement.
	Pavilion	Percentage of diameter represented by the depth of the pavilion.

	Culet	Size of culet.
	Major Sym	Symmetry rating.
	Minor Sym	Symmetry rating.
Coloration		
	Clarity	Standard industry codes (i.e., FL, VS2, SI1, etc.).
	Color	Standard industry codes (i.e., D to Z) that describe body color.
	Fluor	The degree of florescence, if any, in the stone.
Finish		
	Polish	Type of polish.
	Finish	Type of finish.
Quality		
	Cut	How the stone is cut.
	Cost/Ct.	The stone's quality expressed as cost per carat.
	Lab	The ID of the lab that certified the stone.
	Report #	The certificate number associated with the stone.
	Inscription	If the stone has an inscription, what that reads.
Supplier Info		
	Supplier	The name of the supplier.
	Invoice	The invoice number.
	Date Received	The date the stone was received.
Retail/Cost		
	Retail	The current retail price of the stone.
Enhancements		
	Identification	If the stone has an enhancement, the type of the enhancement: • `Natural` • `Laboratory-grown` • `Synthetic`

Enhancement If the stone has an enhancement, the nature of the enhancement:

- Bleached
- Surface coating
- Dyed
- Heat treated
- High pressure, high temperature (HPHT)
- Impregnated
- Irradiated
- Laser drilled
- Lattice diffused

3.3.2.2.2 Colored Stones

The stone type would be other than diamond, opal, jade, or pearl and have its unique requirements displayed on the window.

3.3.2.2.3 Pearl

Pearls have a different set of characteristics than do other gems. The Edge has a set of data elements to accommodate the descriptive values of pearls.

3.3.2.2.4 Opal

Opals have a different set of criteria needed to describe them. The Edge recognizes that need and presents the user with those data elements needed to clearly define opals.

3.3.2.2.5 Jade

Jade has a different set of criteria needed to describe it. The Edge recognizes that need and presents the user with the data elements needed to clearly define jade and the ability to add your own.

3.3.2.2.6 Others

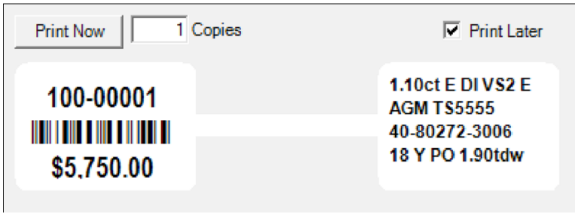
System lists can be manipulated to include your own stone types. See the section entitled Lists for more information and instructions on how to do this.

In the item list view, two asterisks next to the item number indicates that there is a stone type of “other” associated with the item.

3.3.2.3 Item Tag Tab

Tags can be printed in batches from **Print Tags** as described in the section entitled Printing Item Tags. However, you may wish to print a tag for items as you add them to inventory. To print a tag:

1. Select the **Tag** tab from the **Add Item** window. A preview of the tag as defined by the category will appear. Note that The Edge knows whether the tag is yet to be printed. If so, **Print Later** as part of a batch print is selected automatically.



100-00001
$5,750.00

1.10ct E DI VS2 E
AGM TS5555
40-80272-3006
18 Y PO 1.90tdw

2. To print a tag now, select **Print Now**. The tag will print.

Tag layout is set up at the category level. To edit a tag layout for an item, visit the corresponding category's Tag tab.

3.3.2.4 *Item Quantities Tab*

There are six pricing methods included in The Edge. The default method, **Fine Jewelry, Individual Item Pricing**, applies to the majority of inventory and specifies that each item will receive its own unique item number for tracking purposes. For this method, the **Quantities** tab has no use.

The remaining four pricing methods represent different ways of handling what we refer to as bulk inventory (see the section entitled Bulk Inventory). Bulk inventory means that a single item number represents a quantity of an item. All four of these methods make use of the **Quantities** tab.

Buy and Sell Item by Unit of Measure (IUOM)	Recommended for melee diamond parcels. Requires you to specify unit of measure, the number of pieces, total measure, cost (per measure), and price (per measure). This method allows you to keep track of a physical count and measure. For example, if you stocked a three-carat parcel of melee the total measure would be 300 points while the total number of pieces would equal the number of physical stones on the parcel.

To ensure accurate counts, this option requires that items are sold one per sale line during which time the weight of the single item is specified. Selling multiple of this item requires adding additional sale lines.

Buy and Sell by Measure Only (UOM)	Recommended for gold, bar stock, etc. Requires you to specify unit of measure, total measure, cost (per measure), and price (per measure). This method allows you to sell directly by weight.
Mixed Retail (Pre)	Recommended for pre-priced watchbands where the individual cost may not be known. Requires you to specify number of pieces, total cost of shipment, total price

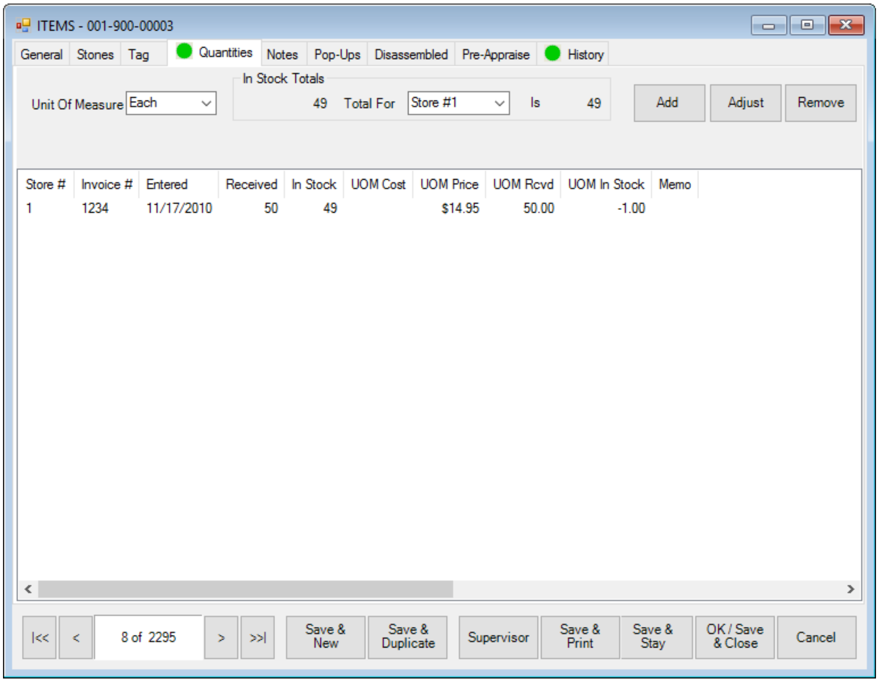
of shipment, and the standard markup used. This method will require that you enter the retail price of the item you are selling at point of sale. Then, based on the total price/cost and markup, it will calculate the cost of that item and reduce the appropriate amounts from the item record.

To ensure accurate counts, PRE requires that items be sold one per sale line. Selling multiple of this item requires additional sale lines.

General Merchandise (UPC/SKU)	Appropriate when an item is carried in quantity and carries the same cost and price each, e.g., charms, batteries, and bead lines.
Spot Metal Pricing (SPOT)	Allows you to carry a quantity and sell metals by penny weight or grams; metal prices can be quickly updated so that you are selling based on the current spot price.

Although you will probably add inventory from invoice as described in the section entitled Add Item from Invoice, you can do so here. To manage quantities from the **Quantities** tab:

1. Find the item with which you wish to work and open the **Quantities** tab.



Unit Of Measure: Each

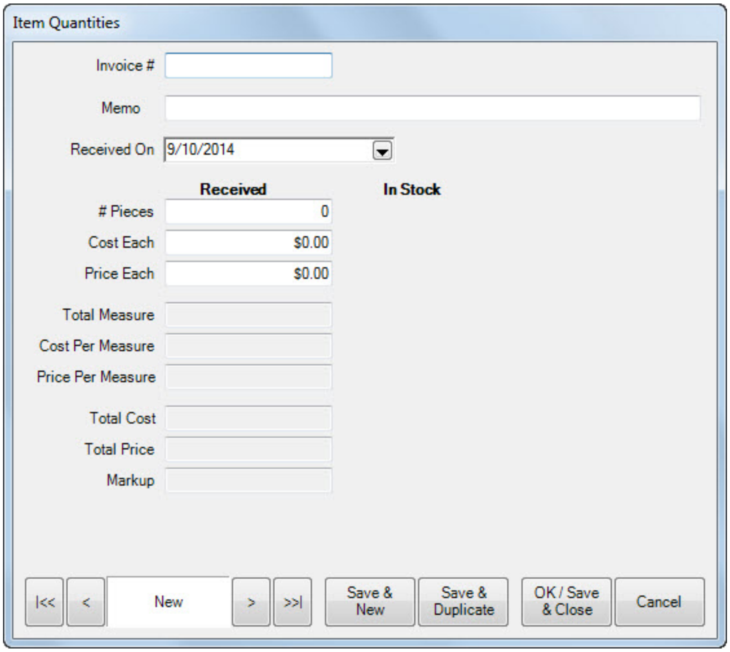
49 Total For Store #1 Is 49

8 of 2295

Store #	Invoice #	Entered	Received	In Stock	UOM Cost	UOM Price	UOM Rcvd	UOM In Stock	Memo
1	1234	11/17/2010	50	49		$14.95	50.00	-1.00	

The appearance of this information will vary depending on the pricing method. It is used primarily for bulk items rather than fine items.

2. To add bulk items, select **Add** from the **Quantities** tab. The **Item Quantities** window will appear.



Received On 9/10/2014

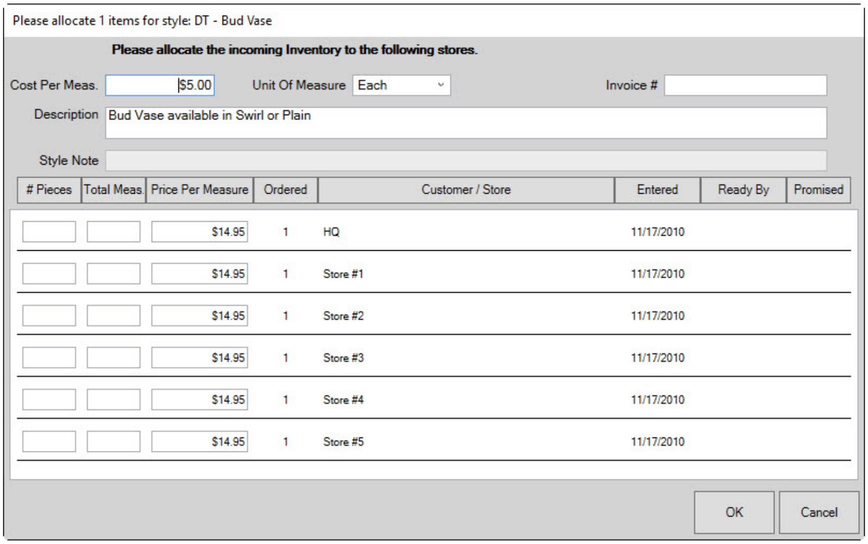
# Pieces	0
Cost Each	$0.00
Price Each	$0.00

Fields and options in the **Item Quantities** window include (but vary according to the item's bulk pricing method):

Invoice #	The incoming invoice number on which the items appear.
Store	The store to which the items should be assigned.
Received On	Date on which the items were received.
Received	Fields in this column apply to the items newly received.
In Stock	Fields in this column apply to the items already in stock.
# Pieces	If fine item pricing, the number of pieces being recorded.
Cost Each	If fine item pricing, the cost of each item to the store.
Price Each	If fine item pricing, the price of each item to the customer.
Total Measure	If a bulk item is sold as a unit of measure, such as ounces, inches, etc., the unit for this item is entered here. This is the total measure of items received.
Cost per Measure	If bulk, the cost of a given quantity to the store.

Price per Measure	If bulk, the price of a given quantity to the customer.
Total Cost	The total cost is calculated.
Total Price	The total price is calculated.
Markup	Markup is calculated.

3. Select **OK/Save & Close**. The **Allocate** window will appear.



Please allocate 1 items for style: DT - Bud Vase

Please allocate the incoming Inventory to the following stores.

Cost Per Meas. $5.00

Unit Of Measure Each

Invoice #

Description Bud Vase available in Swirl or Plain

Style Note

# Pieces	Total Meas.	Price Per Measure	Ordered	Customer / Store	Entered	Ready By	Promised
		$14.95	1	HQ	11/17/2010		
		$14.95	1	Store #1	11/17/2010		
		$14.95	1	Store #2	11/17/2010		
		$14.95	1	Store #3	11/17/2010		
		$14.95	1	Store #4	11/17/2010		
		$14.95	1	Store #5	11/17/2010		

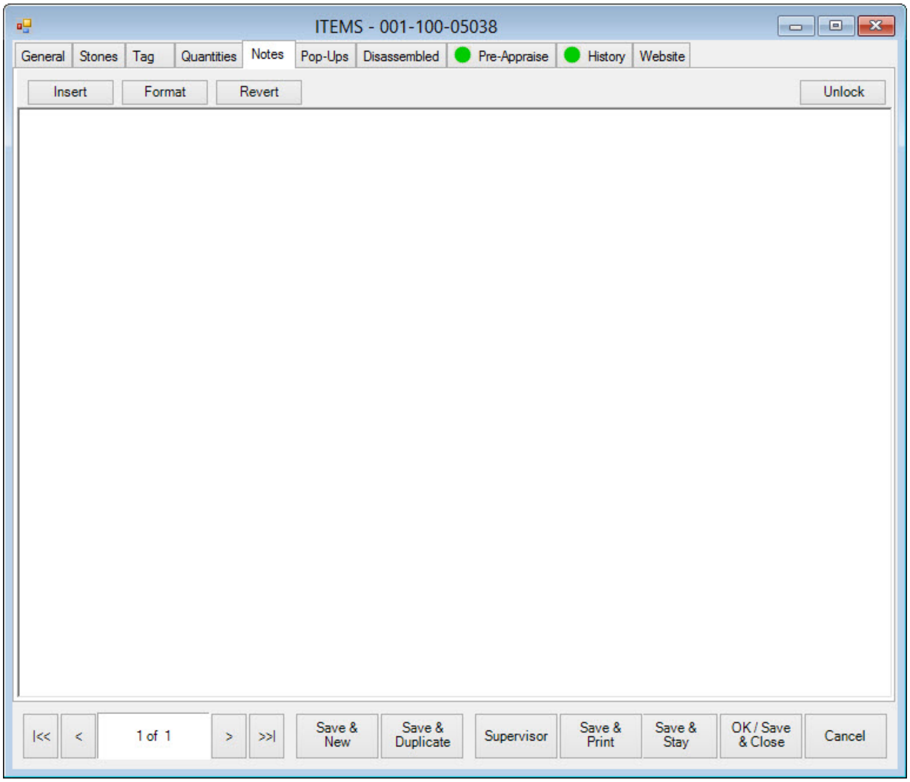
4. Complete the **Item Quantities** tab fields as described in the section entitled Allocating Items and select the **Notes** tab, if desired.

Required fields in the Add Quantity window vary depending on the selected pricing method.

For more information, see the section entitled Bulk Inventory.

3.3.2.5 Item Notes Tab

The **Notes** tab allows you to enter miscellaneous information about the item. Notes will be available at point of sale when the item is inserted into a sale line. This is indicated when the **More** button on the **Point of Sale** window is green.



Fields and options in the **Notes** tab include:

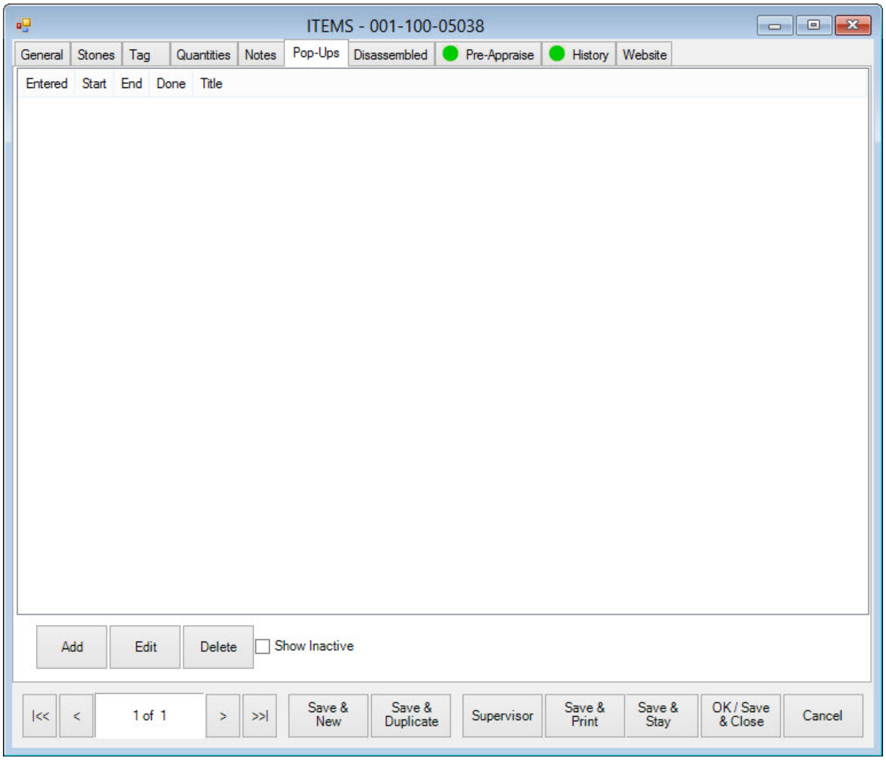
Insert	Insert new note.
Format	Edit font, color, size, etc.
Revert	Revert notes to last save.
Unlock	Unlock previously entered notes.

3.3.2.6 Item Pop-Ups

Items can have pop-up reminders associated with them for point of sale purposes. For example, if an item had an interesting story, and you want the make sure the associate shares that information with the customer, it can appear in a pop-up. Or, suppose there is some point of disclosure that should be mentioned, this would be a good forum for that. Pop-ups can be edited on a specific item or you can use the Item Pop-Up wizard to apply a pop-up to multiple items.

To create a single item pop-up:

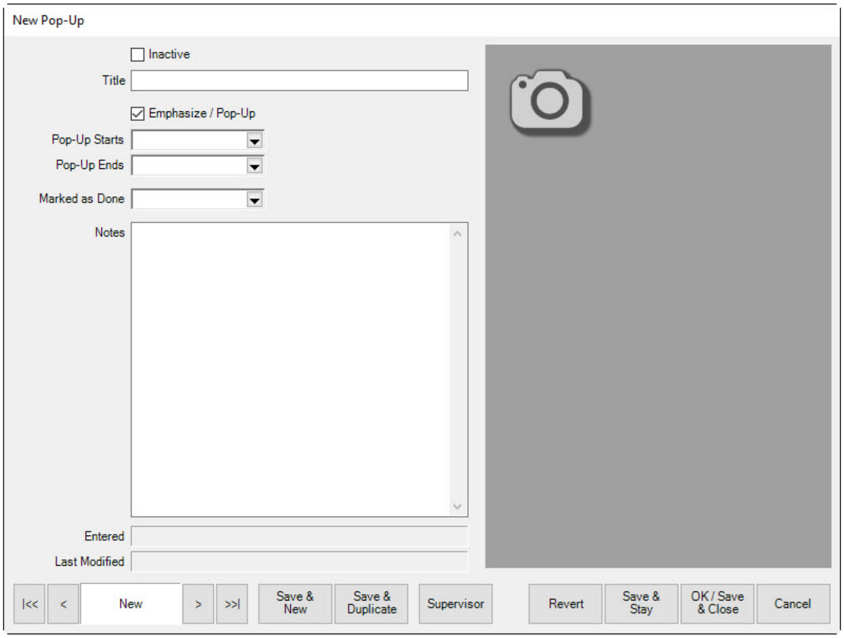
1. From the **Item** window, select the **Pop-Ups** tab.



Fields and options in the **Pop-Ups** tab include:

Add	Insert a new pop-up.
Edit	Edit an existing pop-up.
Delete	Delete a pop-up.
Show Inactive	Allows you to see pop-ups that have been marked inactive.

2. Select **Add**. The **New Pop-Up** window will appear.



☐ Inactive

☑ Emphasize / Pop-Up

Fields and options in the **New Pop-Up** window include:

Inactive	Indicates that this pop-up is inactive.
Title	A descriptive name for the pop-up.
Extra Emphasis	**System Options** control whether you want item pop-ups in general. Enabling this field will cause this specific item pop-up to pop-up. This feature includes additional emphasis options for the **More** button. Here is a summary:

	System Options: If **Inventory Item Pop-Up at POS** is set to `True`	**System Options**: If **Inventory Item Pop-Up at POS** is set to `False`
Extra Emphasis option checked	**More** button turns red and item pop-up appears	**More** button turns red
Extra Emphasis option not checked	**More** button turns green	**More** button turns green

Pop-Up Starts	When the pop-up should start popping up. If this is left blank, the pop-up will start immediately.

Pop-Up Ends	When the pop-up should stop popping up. If this is left blank, the pop-up will continue indefinitely.
Marked as Done	The date when the pop-up was resolved at point of sale by checking the **Do Not Show This Pop-Up Again** option at point of sale.
Notes	The content of the pop-up.
Entered	The date the pop-up was created.
Last Modified	The date, if any, the pop-up was last edited.

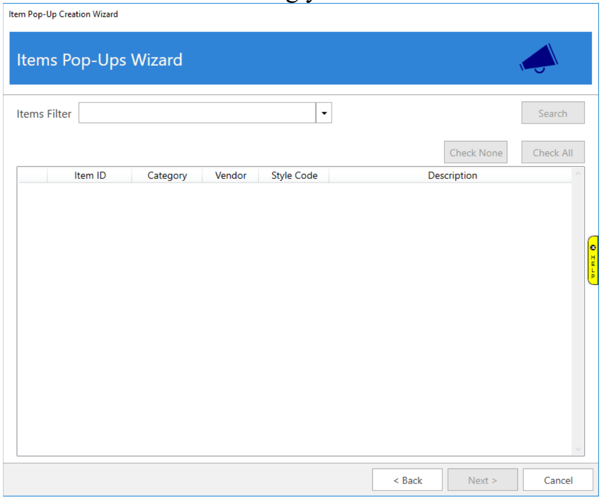
3. Complete fields as desired and select a save option.

3.3.2.7 Item Pop-Up Wizard

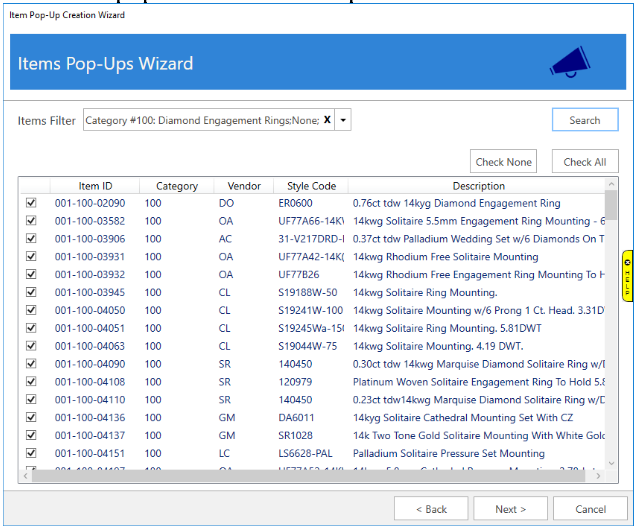
The **Item Pop-Ups** wizard allows you to apply a pop-up to multiple items at once. For more information on item pop-ups see **Item Pop-Ups**.

To use the item pop-up wizard:

1. Click **Inventory ► Items ► Add ► Item Pop-Ups**. The wizard will appear.
2. Click **Next** and it will bring you to the item selection screen.



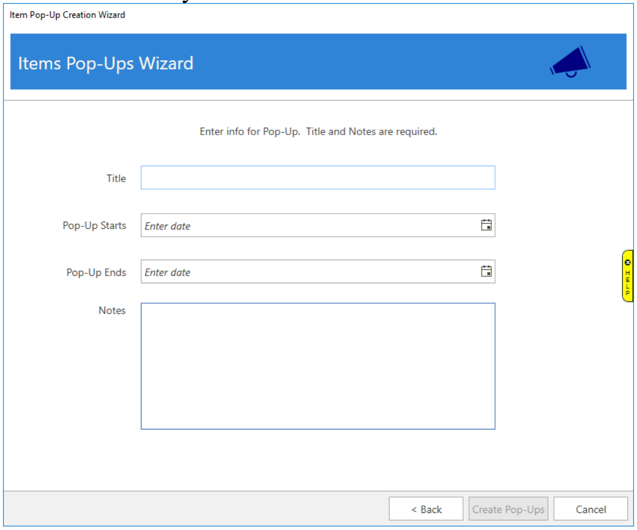
3. Use the **Item Filter** drop-down to specify criteria, then click the **Search** button. A list of matching items will populate in the lower portion of the window.



Items Filter: Category #100: Diamond Engagement Rings;None;

	Item ID	Category	Vendor	Style Code	Description
☑	001-100-02090	100	DO	ER0600	0.76ct tdw 14kyg Diamond Engagement Ring
☑	001-100-03582	100	OA	UF77A66-14K\	14kwg Solitaire 5.5mm Engagement Ring Mounting - 6
☑	001-100-03906	100	AC	31-V217DRD-I	0.37ct tdw Palladium Wedding Set w/6 Diamonds On T
☑	001-100-03931	100	OA	UF77A42-14K(	14kwg Rhodium Free Solitaire Mounting
☑	001-100-03932	100	OA	UF77B26	14kwg Rhodium Free Engagement Ring Mounting To H
☑	001-100-03945	100	CL	S19188W-50	14kwg Solitaire Ring Mounting.
☑	001-100-04050	100	CL	S19241W-100	14kwg Solitaire Mounting w/6 Prong 1 Ct. Head. 3.31D
☑	001-100-04051	100	CL	S19245Wa-15(	14kwg Solitaire Ring Mounting. 5.81DWT
☑	001-100-04063	100	CL	S19044W-75	14kwg Solitaire Mounting. 4.19 DWT.
☑	001-100-04090	100	SR	140450	0.30ct tdw 14kwg Marquise Diamond Solitaire Ring w/I
☑	001-100-04108	100	SR	120979	Platinum Woven Solitaire Engagement Ring To Hold 5.8
☑	001-100-04110	100	SR	140450	0.23ct tdw14kwg Marquise Diamond Solitaire Ring w/D
☑	001-100-04136	100	GM	DA6011	14kyg Solitaire Cathedral Mounting Set With CZ
☑	001-100-04137	100	GM	SR1028	14k Two Tone Gold Solitaire Mounting With White Golc
☑	001-100-04151	100	LC	LS6628-PAL	Palladium Solitaire Pressure Set Mounting

4. Check the items you wish to include and click **Next**.



Enter info for Pop-Up. Title and Notes are required.

Title

Pop-Up Starts: Enter date

Pop-Up Ends: Enter date

Notes

5. Enter the **Title**, date range to display pop-up, and the **Notes**, then click **Create Pop-Ups**. The pop-up will now be added to all the selected items.

3.3.2.8 Assembled Tab

When an item is assembled, this tab details the items and tasks that were used to create an assembled item. If the parts were stock items, this provides shortcuts to the original item (consumed) records. For more about assembled items, see the section entitled Assembling an Item.

3.3.2.9 Disassembled Tab

When an item is disassembled, this tab details the resulting parts (take-offs) and provides a shortcut to these new item records. For more about disassembling, see the section entitled Item Disassembly.

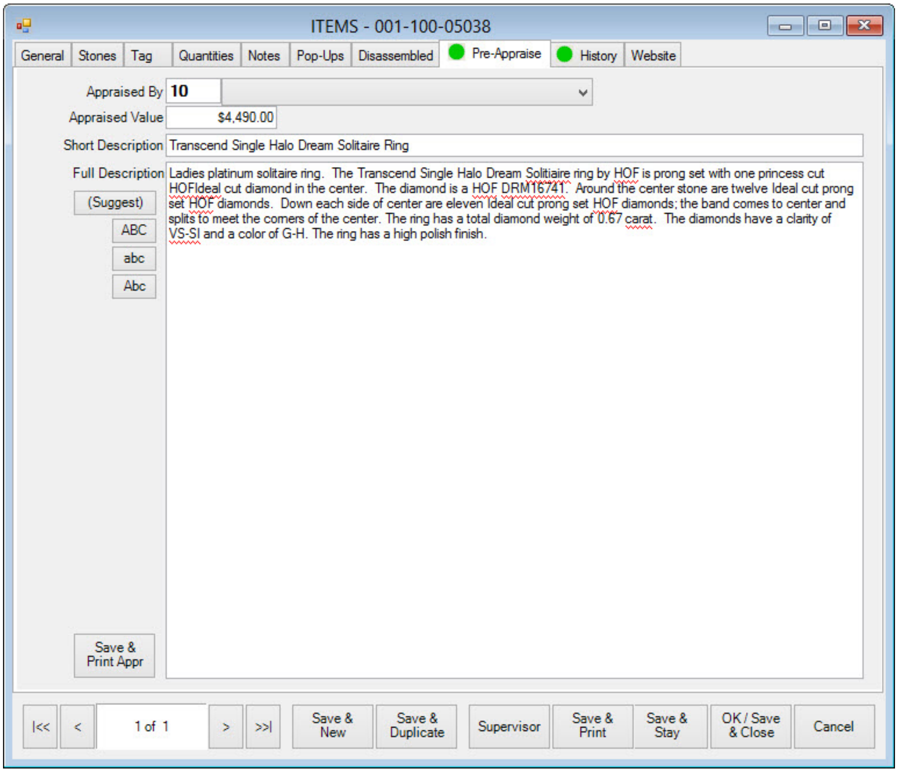
3.3.2.10 Item Pre-Appraise Tab

The **Pre-Appraise** tab allows you to include additional information that will help to generate an appraisal at point of sale. This type of appraisal is not treated as a special service, such as that described in the section entitled Appraisal. This is information entered along with the item when it is entered into inventory. If such an appraisal is conducted, and it is ready to print, the **More…** button next to the sale line item in the **Point of Sale** window will be green.

There is a system option to set a title for pre-appraisal. By default, the option reads “Evaluation Certificate.”

Once the item is sold, you can print this appraisal directly from the **Pre-Appraise** tab of the sold item.

If you do an appraisal intake for an inventory item at point of sale, this information entered here will be used to populate the appraisal intake fields.



Appraised By: 10

Appraised Value: $4,490.00

Short Description: Transcend Single Halo Dream Solitaire Ring

Full Description: Ladies platinum solitaire ring. The Transcend Single Halo Dream Solitiaire ring by HOF is prong set with one princess cut HOFIdeal cut diamond in the center. The diamond is a HOF DRM16741. Around the center stone are twelve Ideal cut prong set HOF diamonds. Down each side of center are eleven Ideal cut prong set HOF diamonds; the band comes to center and splits to meet the comers of the center. The ring has a total diamond weight of 0.67 carat. The diamonds have a clarity of VS-SI and a color of G-H. The ring has a high polish finish.

Fields and options in the **Pre-Appraise** tab include:

Appraised By	The employee ID or appraiser's name from the drop-down list.
Appraised Value	The value as indicated by the appraiser.
Short Description	The short description of the item as included in the item record.
Full Description	The full description of the item as included in the item record.
Suggest	Provided with most description fields, allows The Edge to generate a description based on the previously completed data fields.
Save & Print Appr	Allows you to save the appraisal and print it immediately.

To create a pre-appraisal:

1. From the **Pre-Appraise** tab, select an associate from the **Appraised By** drop-down menu.
2. Enter a value in the **Appraised Value** field.
3. Enter a short description in the **Short Description** field.
4. Enter a full description in the **Full Description** field. The **Suggest** option will offer text based on vendor style information.
5. Select a save option.

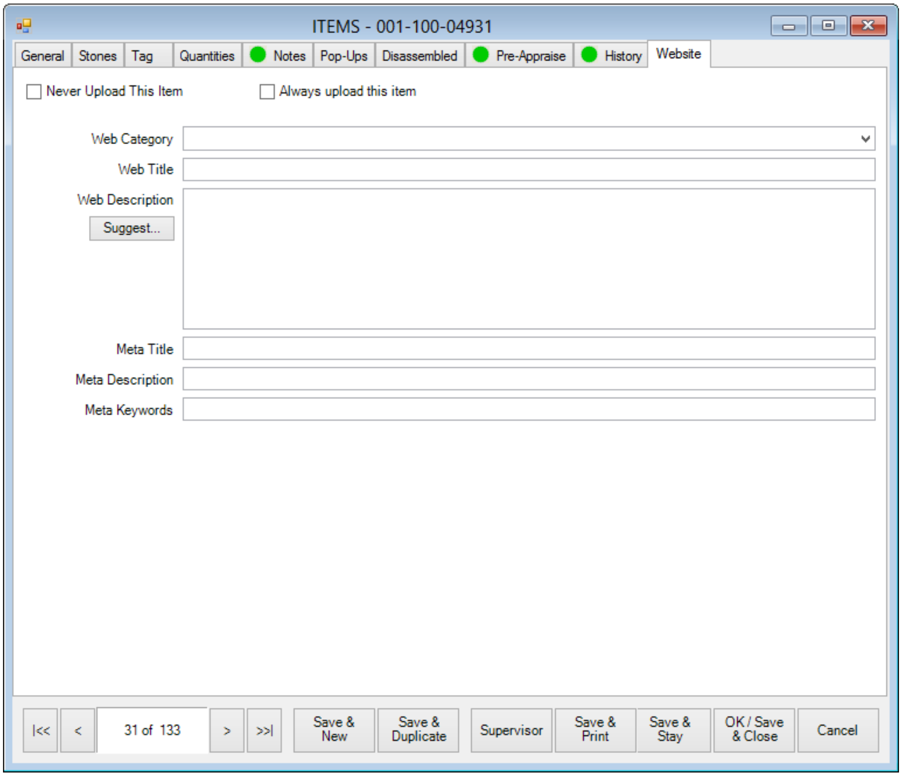
3.3.2.11 History Tab

Any activity concerning the item will be recorded here. This will be empty with a newly added item. Activities might include:

- Inventory addition
- Sale
- Donation or giveaway
- Return to vendor
- The item location for any activity.

3.3.2.12 Website Tab

If you are using Third-Party Website, the **Website** tab is where item upload settings are recorded. For more about third-party website, see the section entitled Third-Party Website.



Fields and options in the **Web** tab include:

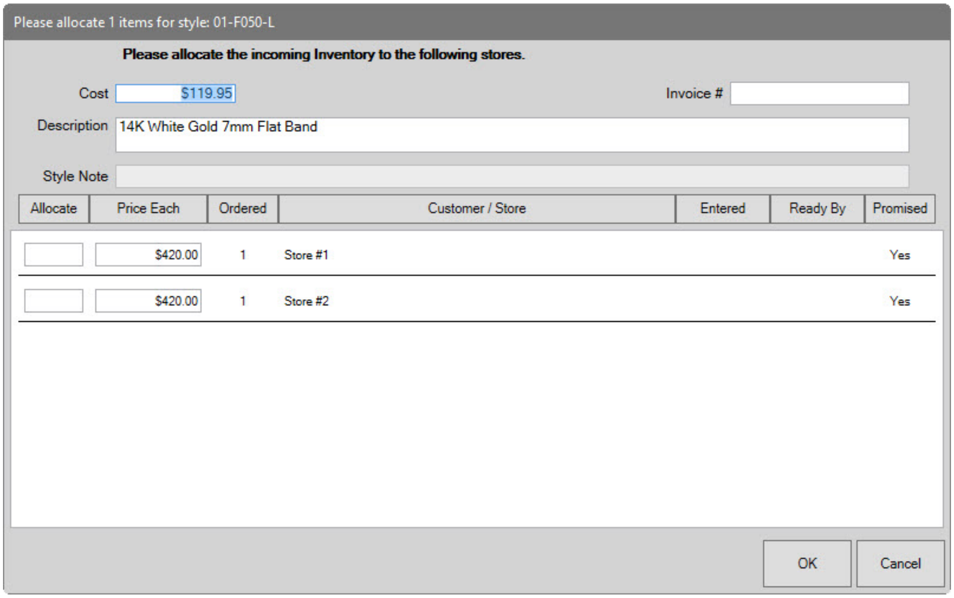
Never Upload This Item	Indicates that the item should never be included in TPW uploads.

Always Upload This Item	Indicates that the item should always be included in TPW uploads. Use this option with caution; when it is enabled, the item will remain on the website until you remove the check. Always Upload This Item is typically used on fast selling items that you always want displayed on the website regardless of whether the item is in stock. A full upload is required anytime the **Always Upload** or **Never Upload** boxes are selected or deselected. Also, you should contact the web company to inform them that those settings were used. They will not automatically populate anywhere on the website until it is configured on the web provider's end.
Web Category	The category from the website into which the item should be put. This may not be the same as The Edge category.
Web Title	The title of the item as it will appear on the website.
Web Description	The description of the item as it will appear on the website. By default, this will be the description that appears in the item record, but you can make changes as needed.
Meta Title	The item title as it should appear in the page's HTML meta tags.
Meta Description	The item description as it should appear in the page's HTML meta tags.
Meta Keywords	Search terms with which to associate this record. Enter as many as you like, but separate them with a comma.

3.3.2.13 Allocating Items

If the item is in response to a purchase order, associated with a special order, it is a bulk item, or if you have a multistore environment, the **Allocate** window will appear. This tells The Edge what to do with the item: assign to a particular store, increase bulk quantities, assign it to a special order, etc. To allocate an item, when prompted:

1. Add or receive the item as needed. When appropriate, the **Allocate** window will appear.



Please allocate 1 items for style: 01-F050-L

Please allocate the incoming Inventory to the following stores.

Cost: $119.95

Invoice #:

Description: 14K White Gold 7mm Flat Band

Style Note:

Allocate	Price Each	Ordered	Customer / Store	Entered	Ready By	Promised
	$420.00	1	Store #1			Yes
	$420.00	1	Store #2			Yes

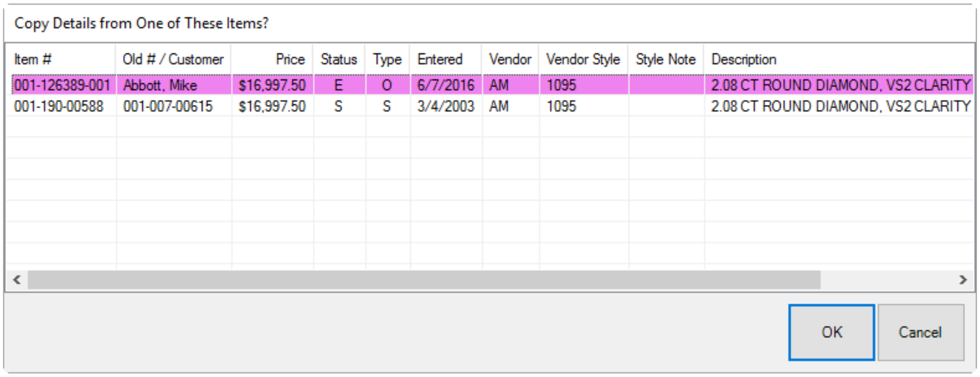
Fields and information in the **Allocate** window include:

Cost	For fine jewelry, enter the TOTAL cost of all items. For bulk pricing methods, enter the cost of EACH item.
Invoice #	The invoice number associated with the item order.
Description	Description of the item.
Style Note	Text added to the style number that will help identify the item. For example, it might be stone type, size, etc.
Allocate	Quantity of this item to allocate to this store or special order.
Price Each	Price of the item to the customer.
Ordered	Quantity on order from purchase order for this store or special order.
Customer/Store	The special order customer or store for this allocation line.
Entered	Date the item was entered for special order at POS.
Ready By	Date the order is to be available.
Promised	ETA date is firm, not an estimate.

2. Enter the number of that item to be allocated to each store.
3. Select **OK**. You will be returned to the add item process you were in.

3.3.2.14 Allocating Special Orders

If the item is the result of a special order, when you enter vendor and style number, you will be prompted to select from an existing item. The item you ordered will be highlighted in purple.



Copy Details from One of These Items?

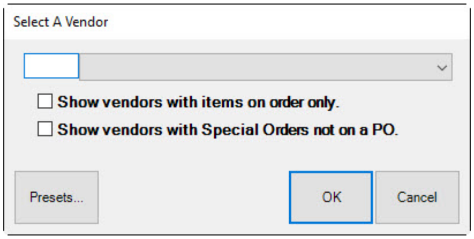
Item #	Old # / Customer	Price	Status	Type	Entered	Vendor	Vendor Style	Style Note	Description
001-126389-001	Abbott, Mike	$16,997.50	E	O	6/7/2016	AM	1095		2.08 CT ROUND DIAMOND, VS2 CLARITY
001-190-00588	001-007-00615	$16,997.50	S	S	3/4/2003	AM	1095		2.08 CT ROUND DIAMOND, VS2 CLARITY

For special orders, there is a separate entry for each special order customer. You can only copy details for one special order at a time.

3.3.3 Add Item from Invoice

The **Receive Invoice** feature allows you to enter a number of items into inventory at once based on the invoice that accompanies the shipment. Though it is designed to function with purchase orders, it can be used by itself. For working with receipt of special orders, matching the incoming item with the order is automatic. To receive items from invoice:

1. Select **Inventory** ► **Items** ► **Add** ► **From Invoice** (or **P/O** ► **Rcv Invoice**). The **Select a Vendor** window will appear.



Select A Vendor

☐ Show vendors with items on order only.

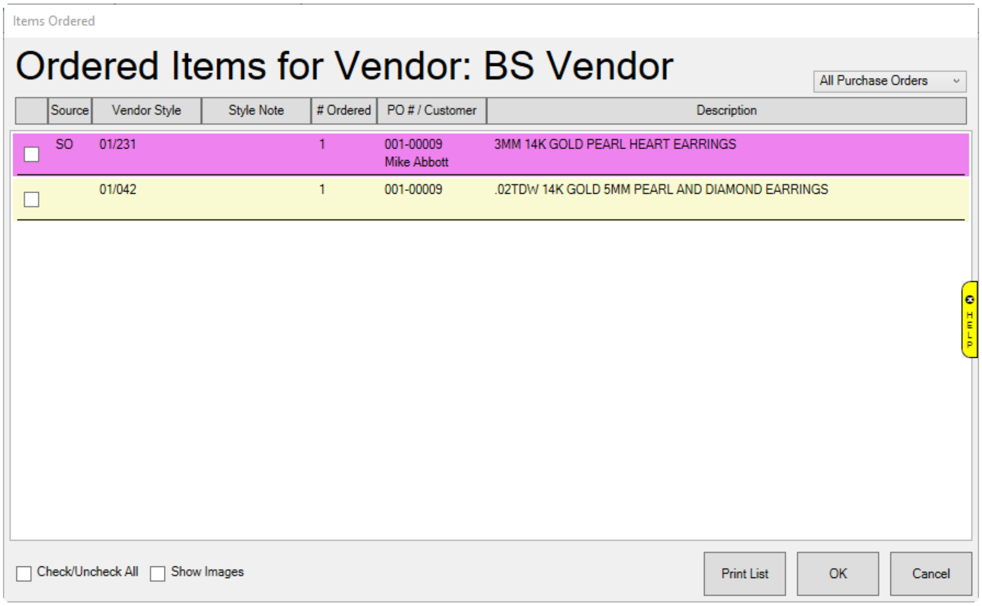
☐ Show vendors with Special Orders not on a PO.

Fields and options in the **Select a Vendor** window include:

Vendor drop-down menu	Used to select the vendor from whom the shipment came.
Show vendors with items on order only	If this is enabled, The Edge populates the **Vendor** drop-down list with vendors who have items on order.

Show vendors with Special Orders not on a PO	If this is enabled, The Edge populates the **Vendor** drop-down list with vendors who have special orders not created in a purchase order.

2. Enter the vendor ID or select it from the drop-down menu and select **OK**. The **Items Ordered** window will appear.



Ordered Items for Vendor: BS Vendor

	Source	Vendor Style	Style Note	# Ordered	PO # / Customer	Description
☐	SO	01/231		1	001-00009 Mike Abbott	3MM 14K GOLD PEARL HEART EARRINGS
☐		01/042		1	001-00009	.02TDW 14K GOLD 5MM PEARL AND DIAMOND EARRINGS

☐ Check/Uncheck All ☐ Show Images

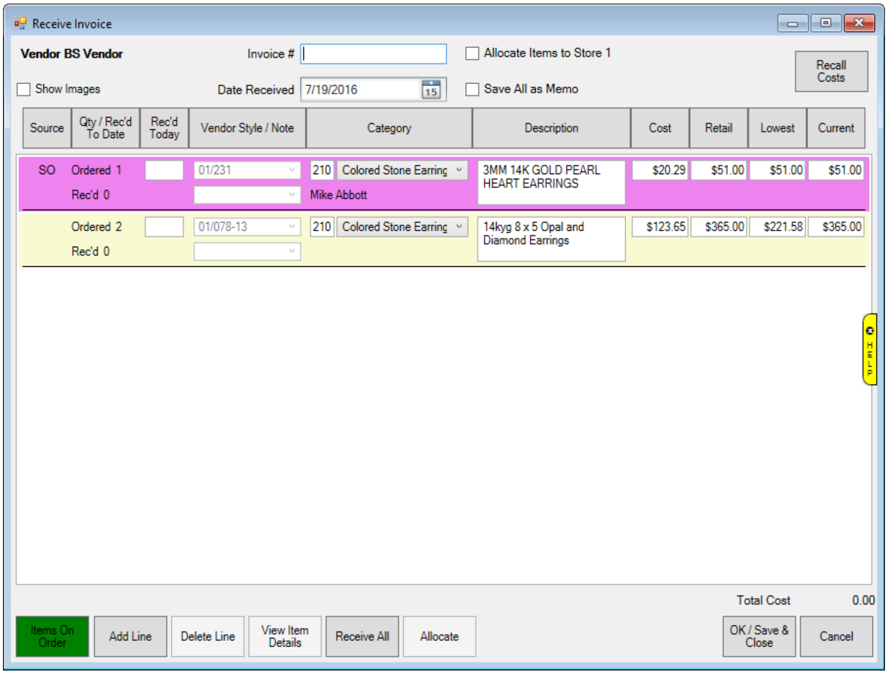
The **Ordered Items** window contains a list of items ordered from this vendor. They may or may not be included in the shipment you are receiving. Information shown on the **Items Ordered** window include:

Source	The initial source of the ordered item: **Q**: Queued from the item record or Rapid Reorder **SO**: Generated by a special order at POS (highlighted in purple).
Vendor Style	The vendor style number for verification.
Style Note	Text added to the style number that will help identify the item. For example, it might be stone type, size, etc.
# Ordered	The quantity ordered.
PO #/Customer	The purchase order number associated with the ordered item. If it is a special order, the customer name will appear.
Description	A description of the item.
Check/Uncheck All	Allows you to quickly check or uncheck all the items in the list.
Show Images	Allows you to enable the image column.

For the purposes of the **Retrieve Queued** window and the **Purchase Order** window, line items will be color-coded as follows:

Yellow	Queued items
Purple	Special order items
Dark Red	Marked to be cancelled
Light Yellow	Other
Blue	Selected
Light blue	Hovering

3. Check the items that are included in this shipment. This should only be done for one invoice at a time.
4. Select **OK**. The **Receive Invoice** window will appear populated with the selected items.



Vendor BS Vendor

Invoice #

☐ Allocate Items to Store 1

☐ Show Images

Date Received 7/19/2016

☐ Save All as Memo

Source	Qty / Rec'd To Date	Rec'd Today	Vendor Style / Note	Category	Description	Cost	Retail	Lowest	Current
SO	Ordered 1 Rec'd 0		01/231	210 Colored Stone Earring Mike Abbott	3MM 14K GOLD PEARL HEART EARRINGS	$20.29	$51.00	$51.00	$51.00
	Ordered 2 Rec'd 0		01/078-13	210 Colored Stone Earring	14kyg 8 x 5 Opal and Diamond Earrings	$123.65	$365.00	$221.58	$365.00

Total Cost 0.00

Fields and options in the **Receive Invoice** window include:

Show Images	Used to show item images if available. This will help you identify the piece.

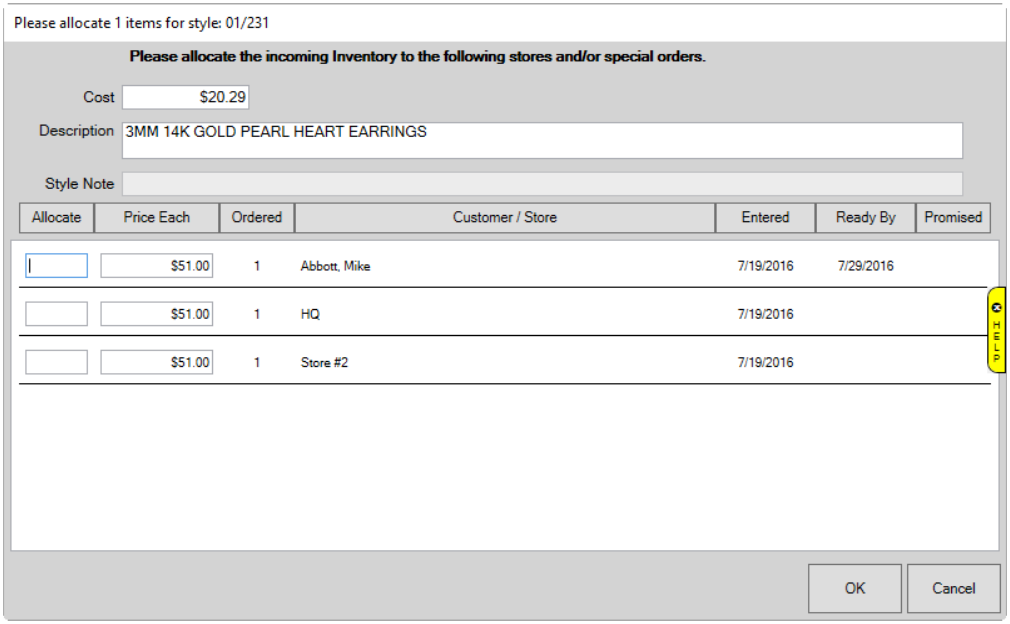
Invoice #	The number of the vendor's invoice that contains the item. This is required.
Date Received	The date you are entering the items. By default, The Edge populates this field with the current date. It will go into the item record as the **Date Entered** value.
Allocate Items to Store x	Allows you to quickly allocate items to store the current store; if you use this, the **Allocate** window will not open for this item when you save the **Receive Invoice** window.
Save All as Memo	Allows you to quickly mark these items as memo items. For more information about memo items, see the section entitled Consignment and Memo Items. This will not work for bulk or special order items.
Recall Costs	Obtains costs for the ordered item lines for all items. If you have the system option set to use the most recent cost, it will load the most recent cost for that style code from the database.
Items on Order	Returns the **Items Ordered** window so you can select additional items.
Add Line	Allows you to manually add an item line to the invoice, from the style number records, or completely new. If the item is associated with a special order, it will be highlighted in purple.
Delete Line	If the item has been ordered, this deletes a line from the **Receive Invoice** list and the item is not received. It does not affect the purchase order, only the receive list. Next time you are receiving from the vendor, it will still appear. The item will be unchecked in the **Items Ordered** list.
View Item Details	Opens the item record for the selected item. Changes made will be reflected here.
Receive All	Automatically receives all items in the **Receive Invoice** list. It fills in the ordered quantities and dates them the current day.
Allocate	Allows you to allocate items for the currently selected line. If it is a special order, be sure to allocate to the correct customer.

5. In the **Invoice #** field, enter the invoice number to be applied to all items received on this shipment.
6. To add new or existing styles to be received on this shipment that didn't appear in the **Items Ordered** window, select **Add Line**. This is useful for shipments that did not have purchase orders associated with them. Alternatively, for items with a vendor barcode that has been in stock before, you can scan the tag and a line item will be populated for you. When you enter the style number, for items used before, The Edge will prompt you to copy the details for the existing record. Note that for special orders, items are highlighted. You must select the correct record to copy from for each customer.
7. For each line item, verify and correct the data:

   a. **Source**: What initiated the order: **Q** is for Queue, **SO** is for Special Order.
   b. **Qty Received to Date**: The quantity of this item so far on this purchase order.
   c. **Qty Received Today**: The quantity of this item received in this shipment.

d. **Vendor Style/Note**: The vendor style number or note.
e. **Category**: The Edge category for the item.
f. **Description**: The Edge description of the item.
g. **Cost**: The cost of the item.
h. **Retail**: The retail price of the item.
i. **Lowest**: The lowest the item can be sold at; this is kept in the item record.
j. **Current**: The current price of the item; this is kept in the item record.

8. Edit or add item lines as needed. If you wish to undo changes to cost, use the **Recall Cost** button.
9. Specify quantity received for each style in the **Rec'd Today** field.
10. Press **Enter**. The **Allocate** window will appear.



Please allocate 1 items for style: 01/231

Please allocate the incoming Inventory to the following stores and/or special orders.

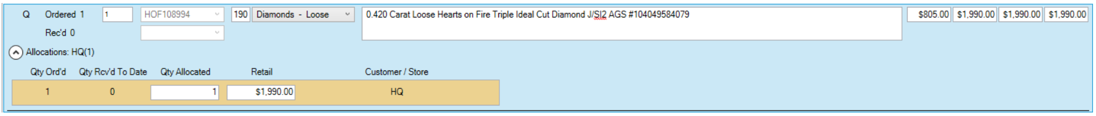
Cost $20.29

Description 3MM 14K GOLD PEARL HEART EARRINGS

Style Note

Allocate	Price Each	Ordered	Customer / Store	Entered	Ready By	Promised
	$51.00	1	Abbott, Mike	7/19/2016	7/29/2016	
	$51.00	1	HQ	7/19/2016		
	$51.00	1	Store #2	7/19/2016		

11. Allocate items as described in the section entitled Allocating Items. Notice that special order items will indicate the customer for whom the items was ordered and use that line to allocate the item to him or her.
12. Select **OK**. The line item in the **Receive Invoice** window will indicate that item has been allocated.



Q Ordered 1 1 HOF108994 190 Diamonds - Loose 0.420 Carat Loose Hearts on Fire Triple Ideal Cut Diamond J/SI2 AGS #104049584079 $805.00 $1,990.00 $1,990.00 $1,990.00

Rec'd 0

Allocations: HQ(1)

Qty Ord'd	Qty Rcv'd To Date	Qty Allocated	Retail	Customer / Store
1	0	1	$1,990.00	HQ

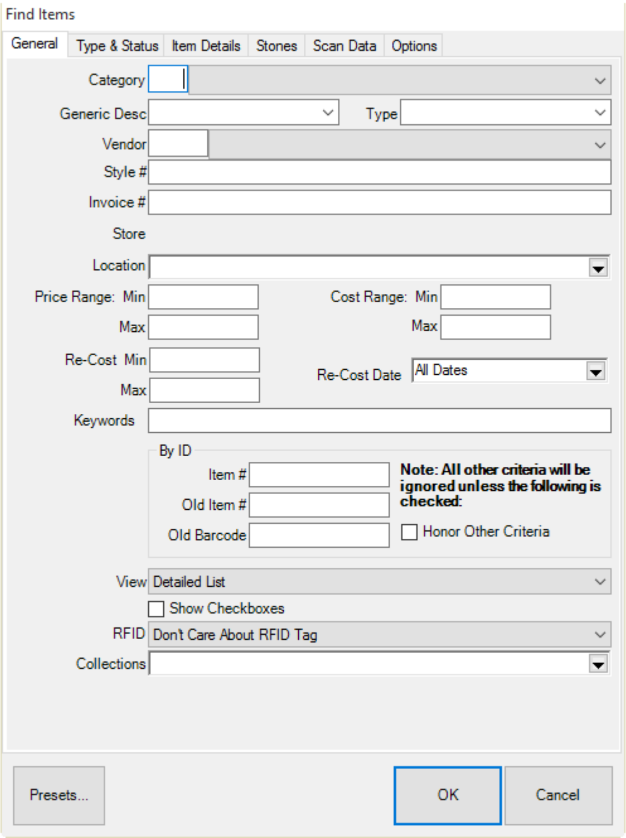
13. Select **OK/Save & Close** to receive this shipment and add these items to inventory. You will have an opportunity to edit item details.

14. Repeat the entire process for each invoice. If a purchase order is associated with the order, its record will be updated to indicate that items were received.

3.3.4 Finding and Editing an Item

To locate a particular item within your inventory:

1. Select **Items ►Find** from the **Inventory** menu.
2. Scan the barcode, enter the item number, or provide other details in the **Find Item** window tabs as described below to search for an item. As always, the **Presets** feature allows you to save search parameters for future use. See the section entitled Presets for more information.



Re-Cost Date: All Dates

Note: All other criteria will be ignored unless the following is checked:

☐ Honor Other Criteria

View: Detailed List

☐ Show Checkboxes

RFID: Don't Care About RFID Tag

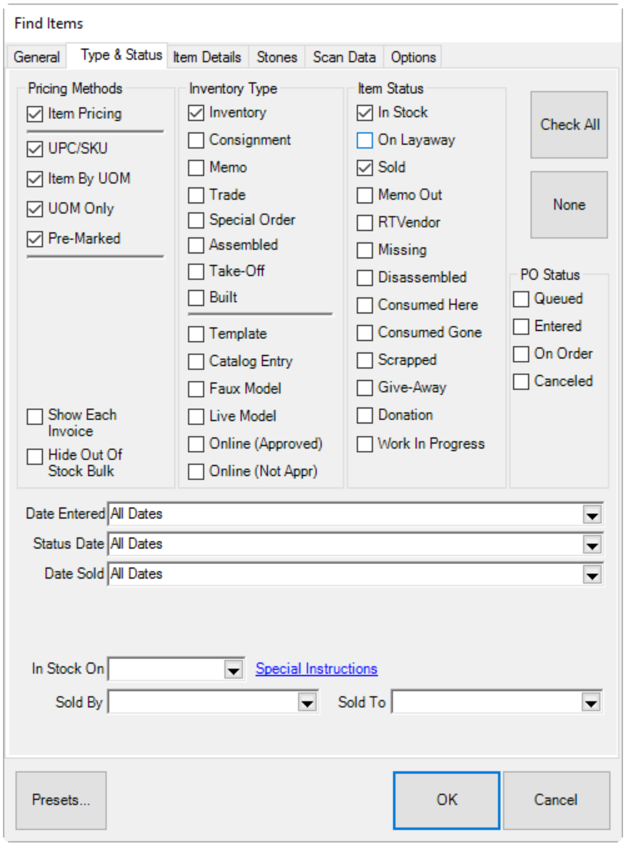
Fields and options in the **General** tab include:

Category	Returns items in the specified category, whether by ID number or selected from the drop-down list.
Generic Desc	Returns items with a matching description.
Type	Returns items of the item type entered.

Vendor	Returns items from the vendor ID indicated, whether by ID number or selected from the drop-down list.
Style#	Returns items matching the style number entered.
Invoice#	Returns items appearing on a particular invoice.
Store	Returns items located in a particular store.
Location	Returns items in a particular location of any store.
Price Range: Min	Returns items priced at greater than or equal to the indicated amount.
Price Range: Max	Returns items priced at less than or equal to the indicated amount.
Keywords	Returns items containing the specified phrase in the description.
By ID	Use this section to query by item ID number.
Item#	Returns items with a matching current item ID. Using this search field will cause The Edge to ignore all other search filters.
Old Item#	Returns items with a matching pre-conversion ID number. To ensure that The Edge looks for only legacy item numbers, put a period (**.**) in front of the number, especially if the legacy number has any dashes.
Old Barcode	Returns items with a matching pre-conversion barcode number.
Honor Other Criteria	Allows you to include these criteria without nullifying other filters; otherwise, searching by **Item #** will cause The Edge to ignore all other search filters.
View	Contains a drop-down menu with options for images to appear in results.
Show Checkboxes	Returns a checkbox with each record in the results. The checkbox can be used to indicate which records to perform various actions on: **Edit**, **Add**, **Delete**, etc.
RFID	Contains a drop-down menu with options for filtering based on whether items have an RFID tag.
Collections	Returns items included in selected collections. For more about collections, see the section entitled Collections.

- **Filter parameters are cumulative. That is, the more parameters you enter, the fewer items will be returned. For example, if you enter a category and a keyword, only items with matches in BOTH fields will be returned. This applies to parameters on all the tabs.**
- **Because this information is specific, if you search by ID, no other search criteria will be used.**

3. Complete the **General** tab fields, if any, as needed to retrieve the appropriate data.
4. If needed, select the **Type & Status** tab.



Pricing Methods
☑ Item Pricing
☑ UPC/SKU
☑ Item By UOM
☑ UOM Only
☑ Pre-Marked
☐ Show Each Invoice
☐ Hide Out Of Stock Bulk

Inventory Type
☑ Inventory
☐ Consignment
☐ Memo
☐ Trade
☐ Special Order
☐ Assembled
☐ Take-Off
☐ Built
☐ Template
☐ Catalog Entry
☐ Faux Model
☐ Live Model
☐ Online (Approved)
☐ Online (Not Appr)

Item Status
☑ In Stock
☐ On Layaway
☑ Sold
☐ Memo Out
☐ RTVendor
☐ Missing
☐ Disassembled
☐ Consumed Here
☐ Consumed Gone
☐ Scrapped
☐ Give-Away
☐ Donation
☐ Work In Progress

PO Status
☐ Queued
☐ Entered
☐ On Order
☐ Canceled

Date Entered: All Dates
Status Date: All Dates
Date Sold: All Dates
In Stock On:
Sold By:
Sold To:

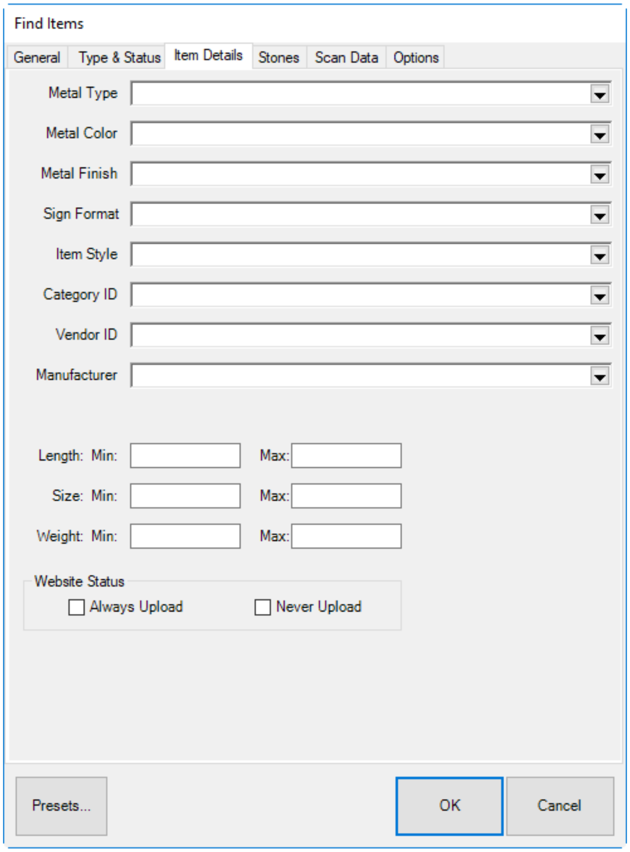
Fields and options in the **Type & Status** tab can vary based on item status. Fields may include:

Pricing Methods	Returns items priced in one or more of the following pricing methods: • **Item Pricing** • **UPC/SKU** • **Item by UOM** • **UOM Only** • **Pre-Marked**.

Inventory Type	Returns items in one or more of the following inventory groups: **A:** Assembled **P:** Take-Off **U:** Custom **S:** Stock **M:** Memo **C:** Consignment **O:** Special Order **T:** Trade-In **B:** Built **E:** Template **V:** Virtual Model **I:** Internet Model approved **J:** Internet Model Browse not yet approved **F:** Faux Model **L:** Live Model.
Item Status	Returns items with one or more of the following statuses: **I** In stock **L** On Layaway **S** Sold **A** Memo Out **V** Returned to Vendor **M** Missing **D** Disassembled **U** Consumed here (i.e. as a part) Consumed gone (no status letter, determined by sold or in stock) **X** Scrapped **G** Giveaway **N** Donation **W** Work in Progress.
PO Status	Returns items with one of more of the following purchase order statuses. **Q** Queued **E** Entered **B** Backordered • On Order **C** Cancelled.
Show each invoice	For bulk items, results show one item row for each invoice.
Hide out-of-stock bulk	Excludes items that are out-of-stock bulk.
Date Entered	Returns items entered into inventory in the provided date range.

Date Created	Returns items entered into inventory in the provided range. Unlike Date Entered, Date Created cannot be changed and will always be the true date the item was entered.
Status Date	Returns items by the date range during which their current status was indicated.
Sold Date	If a **Status** of `Sold` is included, this will return items sold during the specified date range.
In Stock On	Returns items that were in stock inventory on the specified date. This option works in combination with all the other criteria. Most users find it best to also check all the **Item Status** options.
Sold By	If a **Status** of `Sold` is included, this will return items that were sold by a specified associate(s).
Sold To	If a **Status** of `Sold` is included, this will return items that were sold to a specified customer.

5. Complete the **Type & Status** tab fields as needed, if any, to retrieve the appropriate data.
6. Select the **Item Details** tab, if needed.

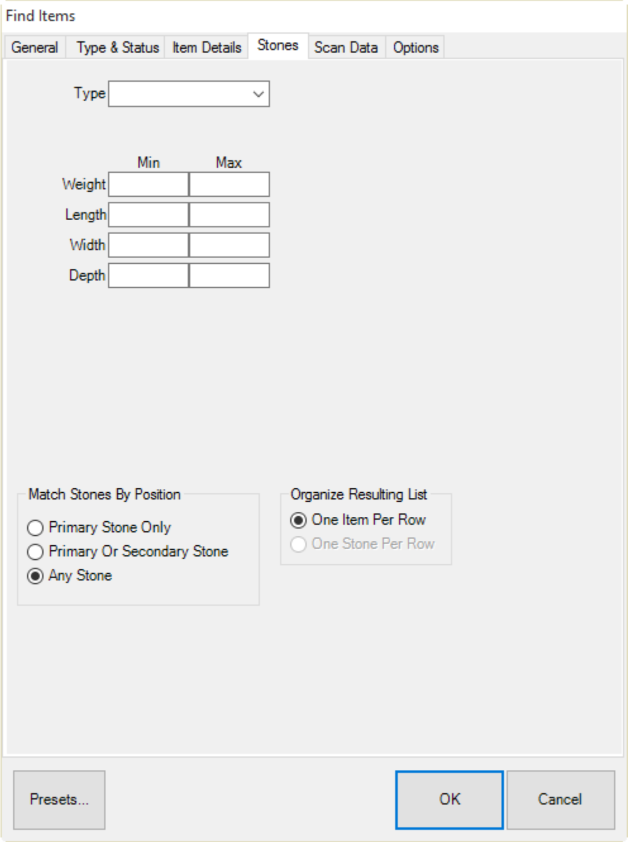


Fields in the **Item Details** tab include:

Metal Type	Returns items of a particular metal type.
Metal Color	Returns items of a particular metal color.
Metal Finish	Returns items of a particular metal finish.
Sign Format	Returns items based upon their designated sign format. Sign formats are assigned on the category setup window.
Item Style	Returns items of a particular style.
Item Location	Returns items based on specified location(s).
Category ID	Returns items of selected categories only.
Vendor ID	Returns items of selected vendors only.
Always Upload	Returns items that are marked **Always Upload** for TPW.

Never Upload	Returns items that are marked **Never Upload** for TPW.

7. Select the **Stones** tab, if needed.



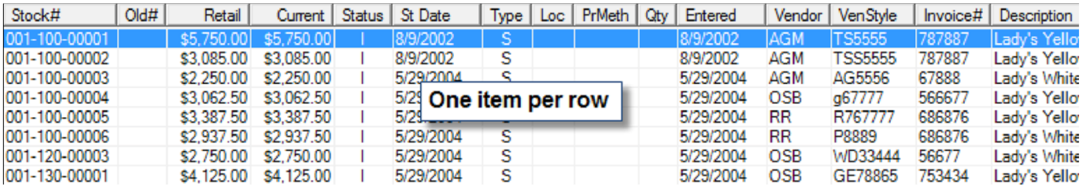
Match Stones By Position
○ Primary Stone Only
○ Primary Or Secondary Stone
● Any Stone

Organize Resulting List
● One Item Per Row
○ One Stone Per Row

Fields and options in the **Stones** tab, which vary according to the stone type, can include:

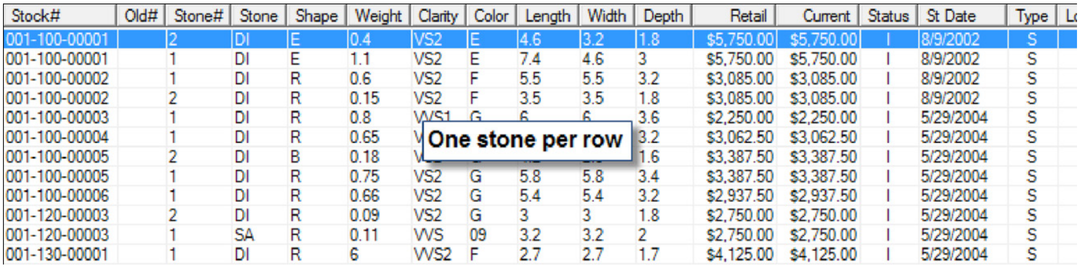
Type	Returns items with stones of a particular type.
Shape	Returns items with stones of a particular shape.
Lab	Returns items with a report associated with a specified lab.
Weight	Returns items with stones of a particular weight range.
Length	Returns items with stones of a particular length range.
Width	Returns items with stones of a particular width range.
Depth	Returns items with stones of a particular depth range.
Coloration	

Clarity, Lowest	Returns items with stones of a minimum clarity.
Clarity, Highest	Returns items with stones of a maximum clarity.
Color, Lowest	Returns items with stones of minimum color designation.
Color, Highest	Returns items with stones of maximum color designation.
Match stones by position	Returns items with stones in a particular position on the piece.
Primary Stone Only	Returns items with the specified stone in position one.
Primary or Secondary Stone	Returns items where stone one or stone two matches the specified criteria.
Any Stone	Returns items where any stone matches the criteria.
Organize resulting list	Indicates how results should be presented.
One item per row	Lists only one item per row in the results.
One stone per row	Lists results by stone. A single item might be listed more than once for each matching stone. This will change the layout of the results, but also focuses the results on the stones rather than the item.



Stock#	Old#	Retail	Current	Status	St Date	Type	Loc	PrMeth	Qty	Entered	Vendor	VenStyle	Invoice#	Description
001-100-00001		$5,750.00	$5,750.00	I	8/9/2002	S				8/9/2002	AGM	TS5555	787887	Lady's Yello
001-100-00002		$3,085.00	$3,085.00	I	8/9/2002	S				8/9/2002	AGM	TSS5555	787887	Lady's Yello
001-100-00003		$2,250.00	$2,250.00	I	5/29/2004	S				5/29/2004	AGM	AG5556	67888	Lady's White
001-100-00004		$3,062.50	$3,062.50	I	[illegible]	[illegible]				5/29/2004	OSB	g67777	566677	Lady's Yello
001-100-00005		$3,387.50	$3,387.50	I	[illegible]	[illegible]				5/29/2004	RR	R767777	686876	Lady's Yello
001-100-00006		$2,937.50	$2,937.50	I	5/29/2004	S				5/29/2004	RR	P8889	686876	Lady's White
001-120-00003		$2,750.00	$2,750.00	I	5/29/2004	S				5/29/2004	OSB	WD33444	56677	Lady's White
001-130-00001		$4,125.00	$4,125.00	I	5/29/2004	S				5/29/2004	OSB	GE78865	753434	Lady's Yello

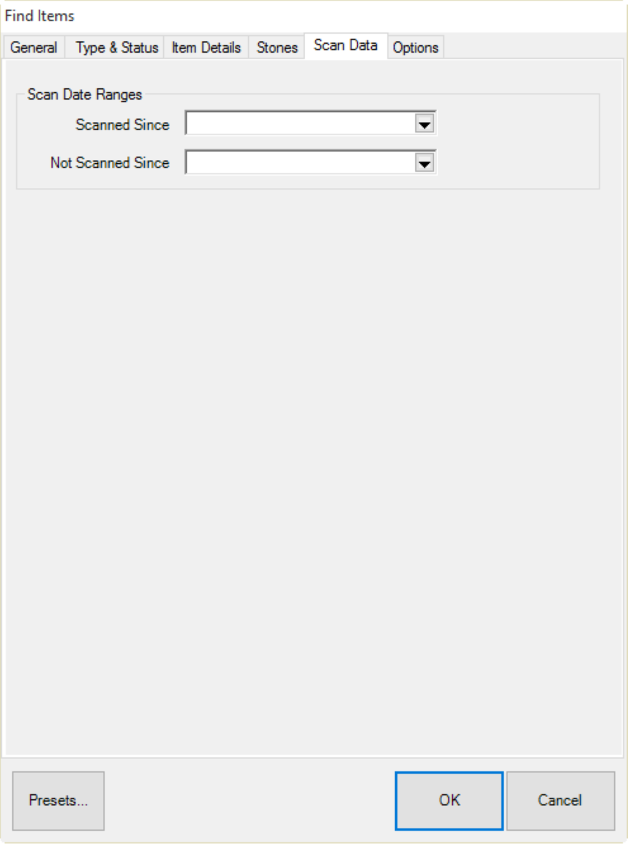
One item per row



Stock#	Old#	Stone#	Stone	Shape	Weight	Clarity	Color	Length	Width	Depth	Retail	Current	Status	St Date	Type
001-100-00001		2	DI	E	0.4	VS2	E	4.6	3.2	1.8	$5,750.00	$5,750.00	I	8/9/2002	S
001-100-00001		1	DI	E	1.1	VS2	E	7.4	4.6	3	$5,750.00	$5,750.00	I	8/9/2002	S
001-100-00002		1	DI	R	0.6	VS2	F	5.5	5.5	3.2	$3,085.00	$3,085.00	I	8/9/2002	S
001-100-00002		2	DI	R	0.15	VS2	F	3.5	3.5	1.8	$3,085.00	$3,085.00	I	8/9/2002	S
001-100-00003		1	DI	R	0.8	VVS1	G	6	6	3.6	$2,250.00	$2,250.00	I	5/29/2004	S
001-100-00004		1	DI	R	0.65	[illegible]	[illegible]	[illegible]	[illegible]	3.2	$3,062.50	$3,062.50	I	5/29/2004	S
001-100-00005		2	DI	B	0.18	[illegible]	[illegible]	[illegible]	[illegible]	1.6	$3,387.50	$3,387.50	I	5/29/2004	S
001-100-00005		1	DI	R	0.75	VS2	G	5.8	5.8	3.4	$3,387.50	$3,387.50	I	5/29/2004	S
001-100-00006		1	DI	R	0.66	VS2	G	5.4	5.4	3.2	$2,937.50	$2,937.50	I	5/29/2004	S
001-120-00003		2	DI	R	0.09	VS2	G	3	3	1.8	$2,750.00	$2,750.00	I	5/29/2004	S
001-120-00003		1	SA	R	0.11	VVS	09	3.2	3.2	2	$2,750.00	$2,750.00	I	5/29/2004	S
001-130-00001		1	DI	R	6	VVS2	F	2.7	2.7	1.7	$4,125.00	$4,125.00	I	5/29/2004	S

One stone per row

8. Complete the **Stones** tab fields, if any, as needed to retrieve the appropriate data.
9. Select the **Scan Data** tab, if needed.



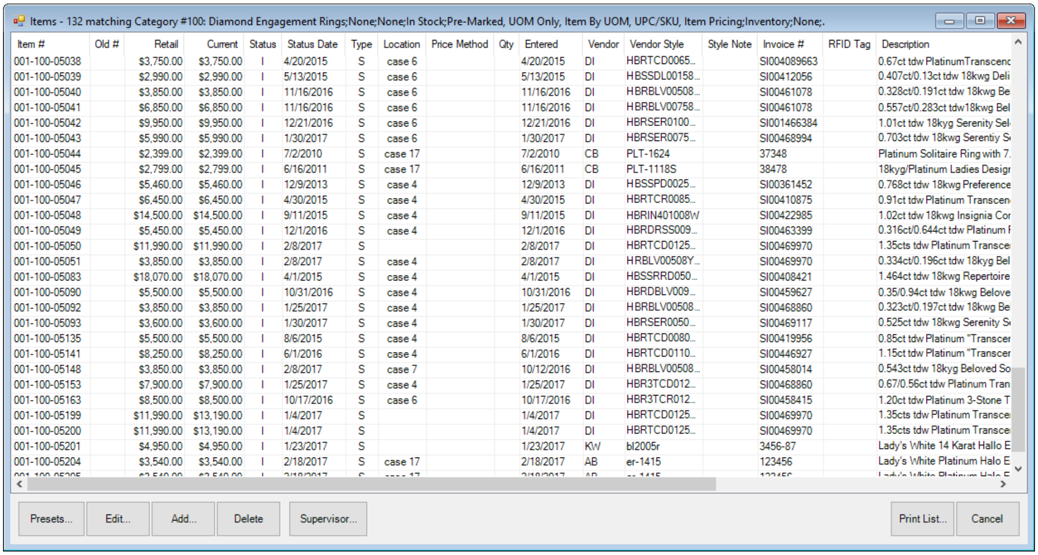
Fields and options in the **Scan Data** tab include:

Scanned Since	Returns items that have been scanned during physical inventory of any kind since the specified date and time. If you use this filter, also enter a time from the bottom of the date picker.
Not Scanned Since	Returns items that have not been scanned during physical inventory of any kind since the specified date and time. If you use this filter, also enter a time from the bottom of the date picker.

10. If desired, enter date and time to narrow by the last inventory scan.
11. Select the **Options** tab, if needed. The **Options** tab contains data determined by the context of the operation. For example, it might allow the **Find** function to include the cost of an item.

Parameters are cumulative. That is, the more parameters you enter, the fewer items will be returned. This applies to parameters on all the tabs.

12. Select **OK**. A list of the matching items will appear.



Items - 132 matching Category #100: Diamond Engagement Rings;None;None;In Stock;Pre-Marked, UOM Only, Item By UOM, UPC/SKU, Item Pricing;Inventory;None;.

Item #	Old #	Retail	Current	Status	Status Date	Type	Location	Price Method	Qty	Entered	Vendor	Vendor Style	Style Note	Invoice #	RFID Tag	Description
001-100-05038		$3,750.00	$3,750.00	I	4/20/2015	S	case 6			4/20/2015	DI	HBRTCD0065...		SI004089663		0.67ct tdw PlatinumTranscen
001-100-05039		$2,990.00	$2,990.00	I	5/13/2015	S	case 6			5/13/2015	DI	HBSSDL00158...		SI00412056		0.407ct/0.13ct tdw 18kwg Deli
001-100-05040		$3,850.00	$3,850.00	I	11/16/2016	S	case 6			11/16/2016	DI	HBRBLV00508...		SI00461078		0.328ct/0.191ct tdw 18kwg Be
001-100-05041		$6,850.00	$6,850.00	I	11/16/2016	S	case 6			11/16/2016	DI	HBRBLV00758...		SI00461078		0.557ct/0.283ct tdw18kwg Bel
001-100-05042		$9,950.00	$9,950.00	I	12/21/2016	S	case 6			12/21/2016	DI	HBRSER0100...		SI001466384		1.01ct tdw 18kyg Serenity Sel
001-100-05043		$5,990.00	$5,990.00	I	1/30/2017	S	case 6			1/30/2017	DI	HBRSER0075...		SI00468994		0.703ct tdw 18kwg Serentiy S
001-100-05044		$2,399.00	$2,399.00	I	7/2/2010	S	case 17			7/2/2010	CB	PLT-1624		37348		Platinum Solitaire Ring with 7.
001-100-05045		$2,799.00	$2,799.00	I	6/16/2011	S	case 17			6/16/2011	CB	PLT-1118S		38478		18kyg/Platinum Ladies Desig
001-100-05046		$5,460.00	$5,460.00	I	12/9/2013	S	case 4			12/9/2013	DI	HBSSPD0025...		SI00361452		0.768ct tdw 18kwg Preference
001-100-05047		$6,450.00	$6,450.00	I	4/30/2015	S	case 4			4/30/2015	DI	HBRTCR0085...		SI00410875		0.91ct tdw Platinum Transcen
001-100-05048		$14,500.00	$14,500.00	I	9/11/2015	S	case 4			9/11/2015	DI	HBRIN401008W		SI00422985		1.02ct tdw 18kwg Insignia Co
001-100-05049		$5,450.00	$5,450.00	I	12/1/2016	S	case 4			12/1/2016	DI	HBRDRSS009...		SI00463399		0.316ct/0.644ct tdw Platinum
001-100-05050		$11,990.00	$11,990.00	I	2/8/2017	S				2/8/2017	DI	HBRTCD0125...		SI00469970		1.35cts tdw Platinum Transce
001-100-05051		$3,850.00	$3,850.00	I	2/8/2017	S	case 4			2/8/2017	DI	HRBLV00508Y...		SI00469970		0.334ct/0.196ct tdw 18kyg Bel
001-100-05083		$18,070.00	$18,070.00	I	4/1/2015	S	case 4			4/1/2015	DI	HBSSRRD050...		SI00408421		1.464ct tdw 18kwg Repertoire
001-100-05090		$5,500.00	$5,500.00	I	10/31/2016	S	case 4			10/31/2016	DI	HBRDBLV009...		SI00459627		0.35/0.94ct tdw 18kwg Belove
001-100-05092		$3,850.00	$3,850.00	I	1/25/2017	S	case 4			1/25/2017	DI	HBRBLV00508...		SI00468860		0.323ct/0.197ct tdw 18kwg Be
001-100-05093		$3,600.00	$3,600.00	I	1/30/2017	S	case 4			1/30/2017	DI	HBRSER0050...		SI00469117		0.525ct tdw 18kwg Serenity S
001-100-05135		$5,500.00	$5,500.00	I	8/6/2015	S	case 4			8/6/2015	DI	HBRTCD0080...		SI00419956		0.85ct tdw Platinum "Transce
001-100-05141		$8,250.00	$8,250.00	I	6/1/2016	S	case 4			6/1/2016	DI	HBRTCD0110...		SI00446927		1.15ct tdw Platinum "Transce
001-100-05148		$3,850.00	$3,850.00	I	2/8/2017	S	case 7			10/12/2016	DI	HBRBLV00508...		SI00458014		0.543ct tdw 18kyg Beloved So
001-100-05153		$7,900.00	$7,900.00	I	1/25/2017	S	case 4			1/25/2017	DI	HBR3TCD012...		SI00468860		0.67/0.56ct tdw Platinum Tran
001-100-05163		$8,500.00	$8,500.00	I	10/17/2016	S	case 6			10/17/2016	DI	HBR3TCR012...		SI00458415		1.20ct tdw Platinum 3-Stone T
001-100-05199		$11,990.00	$13,190.00	I	1/4/2017	S				1/4/2017	DI	HBRTCD0125...		SI00469970		1.35cts tdw Platinum Transce
001-100-05200		$11,990.00	$13,190.00	I	1/4/2017	S				1/4/2017	DI	HBRTCD0125...		SI00469970		1.35cts tdw Platinum Transce
001-100-05201		$4,950.00	$4,950.00	I	1/23/2017	S				1/23/2017	KW	bl2005r		3456-87		Lady's White 14 Karat Hallo E
001-100-05204		$3,540.00	$3,540.00	I	2/18/2017	S	case 17			2/18/2017	AB	er-1415		123456		Lady's White Platinum Halo E

- **An item number with one asterisk next to it represents a bulk item quantity added at another store.**
- **Two asterisks next to the item number indicates that there is a stone type of "other" associated with the item.**

13. For more detail about a piece, double-click on it or select it and select **Edit**. Alternatively, select the item and select **Details** or press **Enter**.
14. Work with the item as needed. Fields and options in the **Item Record** are described in the section entitled Adding an Item (Standard).
15. For options in working with the Supervisor menu, see the section entitled Working with Item Records.

3.3.5 Working with Item Records

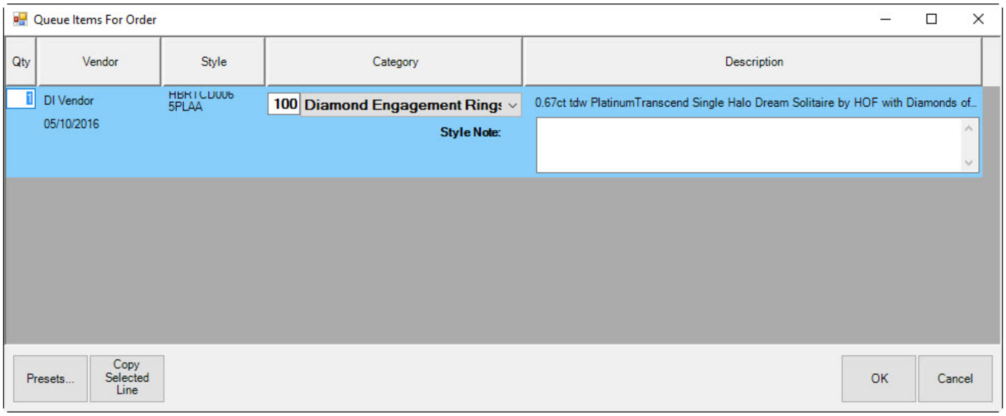
This section details the information found in each item record. From the item record, you can make changes to item records, order items, or change the category.

3.3.5.1 Order Items

Found on the **Item List** view **Supervisor** menu, **Order Items** allows you to quickly select items and start purchase orders based on the existing records. To do so:

1. From the **Item List** view, select the item or items you wish to order.

2. From the **Item List** view **Supervisor** menu, select **Order Items**. The **Queue Items for Order** window will appear.



Qty	Vendor	Style	Category	Description
1	DI Vendor 05/10/2016	HBRTCD006 5PLAA	100 Diamond Engagement Ring:	0.67ct tdw PlatinumTranscend Single Halo Dream Solitaire by HOF with Diamonds of...

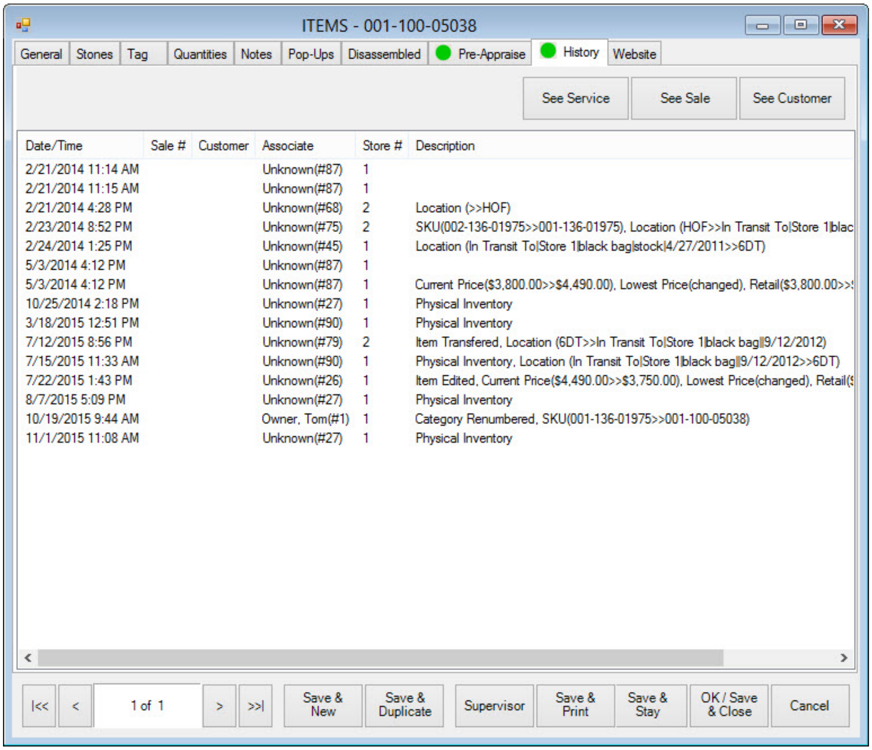
Style Note:

3. In the **Qty** field, enter the number of the item to order.
4. Check the other fields to ensure accuracy.
5. To create a new line using one of the existing ones, select the line to copy and select **Copy Selected Line**.
6. Select **OK**. The order will be queued.
7. Create a purchase order and submit it as described in the section entitled Purchase Orders.

3.3.5.2 Working with Item History

To work with existing item history:

1. From the **Item** details window, select the **History** tab. If there are entries in the item's history, there will be a green dot on the tab. Because we are creating a new item, there will be an empty **History** tab.



Date/Time	Sale #	Customer	Associate	Store #	Description
2/21/2014 11:14 AM			Unknown(#87)	1	
2/21/2014 11:15 AM			Unknown(#87)	1	
2/21/2014 4:28 PM			Unknown(#68)	2	Location (>>HOF)
2/23/2014 8:52 PM			Unknown(#75)	2	SKU(002-136-01975>>001-136-01975), Location (HOF>>In Transit To|Store 1|blac
2/24/2014 1:25 PM			Unknown(#45)	1	Location (In Transit To|Store 1|black bag|stock|4/27/2011>>6DT)
5/3/2014 4:12 PM			Unknown(#87)	1	
5/3/2014 4:12 PM			Unknown(#87)	1	Current Price($3,800.00>>$4,490.00), Lowest Price(changed), Retail($3,800.00>>
10/25/2014 2:18 PM			Unknown(#27)	1	Physical Inventory
3/18/2015 12:51 PM			Unknown(#90)	1	Physical Inventory
7/12/2015 8:56 PM			Unknown(#79)	2	Item Transfered, Location (6DT>>In Transit To|Store 1|black bag||9/12/2012)
7/15/2015 11:33 AM			Unknown(#90)	1	Physical Inventory, Location (In Transit To|Store 1|black bag||9/12/2012>>6DT)
7/22/2015 1:43 PM			Unknown(#26)	1	Item Edited, Current Price($4,490.00>>$3,750.00), Lowest Price(changed), Retail(
8/7/2015 5:09 PM			Unknown(#27)	1	Physical Inventory
10/19/2015 9:44 AM			Owner, Tom(#1)	1	Category Renumbered, SKU(001-136-01975>>001-100-05038)
11/1/2015 11:08 AM			Unknown(#27)	1	Physical Inventory

2. To see event detail, select it and select **See Service**, **See Sale**, or **See Customer** as needed. These options will return the detailed transaction or customer record, if applicable.
3. Select a save option. Changes made in all tabs will be saved.

3.3.5.3 Move Items to New Category

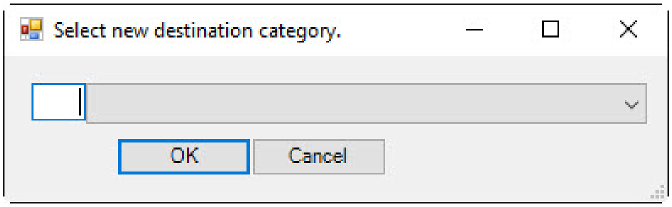
Changing categories cannot be undone.

Before changing categories, you must protect the integrity of your database by doing the following:

- Shut down The Edge in all workstations but the one from which you will do this.
- Backup your database.
- Tags will be queued for reprint; we recommend you do this immediately after the recategorization.

To change the category in which an item falls:

1. From the **Item List** view, use the checkbox option to select the item or items you wish to recategorize.
2. From the **Item List** view **Supervisor** menu, select **Move Items to New Category**. You will be prompted to select a new category.



3. Enter a category ID or select a category from the drop-down menu.
4. Select **OK**. A confirmation will appear.

3.3.5.4 Return to Vendor

Found in **Supervisor** at the bottom of the **Item List** view or **Item** window, the **Return to Vendor** option allows you to return an item to the vendor. It will take the item out of inventory. To do so:

1. From the **Items** list, right click to turn on the checkboxes next to the items.
2. Select the items to be returned.
3. From the **Supervisor** menu, select **Return to Vendor**.
4. After confirmation that the item has been taken out of inventory.

3.3.5.5 Back from Vendor

1. From the **Item List** view, select the item or items you wish to get back from the vendor.
2. From the **Item List** view **Supervisor** menu, select **Back From Vendor**. The item status will change accordingly.

3.3.5.6 See Cost, See Re-Cost, See Lowest

Found in **Supervisor** at the bottom of the **Item** window, the **See Cost**, **See Re-Cost**, and **See Lowest** options causes these fields to become visible in the **Item** window. They can be turned off using the analogous **Hide Cost**, **Hide Re-Cost**, and **Hide Lowest**.

See Cost	Allows the supervisor to view the initial cost of the item.
See Re-Cost	Allows the superivsor to view the re-defined cost of the item.
See Lowest	Allows the supervisor to view lowest price at which the item may sell.

3.3.5.7 Change Pricing/Protect Pricing

Found in **Supervisor** at the bottom of the **Item** window, the **Change Pricing**/**Protect Pricing** option allows the supervisor to change the cost, re-cost, and lowest figures in the **Item** window, **Pricing** area. For more about item pricing, see the section entitled Reprice Items.

3.3.5.8 Missing/Scrap/RTV

To mark an item as missing, scrap, or return to vendor:

1. From the **Item Detail** window **Supervisor** menu, select **Missing**, **Scrap**, or **RTV** as desired. You will be prompted to confirm the action.
2. Select **Yes**. The item status will change.

You can return to vendor en masse from the list view:

1. From the list view, check the items for which their status must be changed.
2. From the **Supervisor** menu, select the appropriate option.

In some cases, especially if dealing with bulk or missing items, the entire list might need to be of the same status, so use the item find filter with that in mind. Bulk found gets recorded against missing items before The Edge creates new records.

3.3.5.9 Fixup Status

The **Fixup Status** option allows you to correct an item's status, e.g., sold vs. in-stock, etc. This is typically used to correct an item record after an error or crash occurred. The Edge looks at item records and compares with sales records to reconcile differences. To do so:

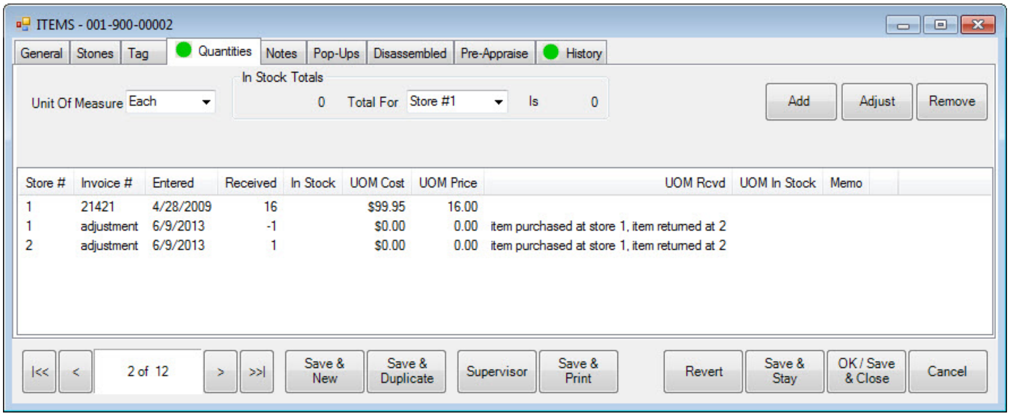
From the **Item Detail** window **Supervisor** menu, select **Fixup Status**. The status change process will run. If the sale record indicates that an item should be a different status than what is on file, you will be prompted to perform the suggested corrective action.

3.3.5.10 Editing Existing Bulk Quantities

The Edit Bulk Quantities option is used only to correct entry errors. In the case of a return to vendor, scrapped item, or missing item, it is best to use options in the Supervisor Menu. Otherwise, use of this option could result in bookkeeping errors.

To make changes to bulk quantities after they have been committed to inventory, i.e., to correct an error:

1. Select **Inventory ► Items ► Find**.
2. Enter the vendor ID and vendor style number.
3. Select the **Type & Status** tab.
4. Choose the appropriate bulk **Pricing Method** (or all bulk pricing methods).
5. Select **OK.**
6. Select and edit the bulk item record.
7. Select the **Quantities** tab.



Unit Of Measure Each

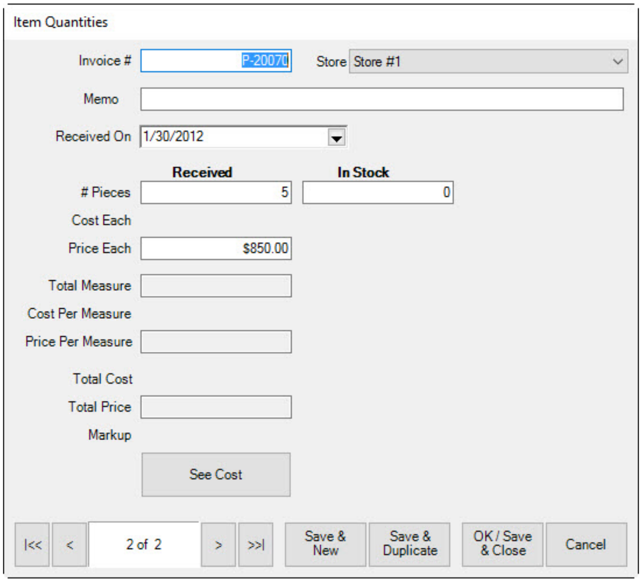
In Stock Totals 0 Total For Store #1 Is 0

Store #	Invoice #	Entered	Received	In Stock	UOM Cost	UOM Price		UOM Rcvd	UOM In Stock	Memo
1	21421	4/28/2009	16		$99.95	16.00				
1	adjustment	6/9/2013	-1		$0.00	0.00	item purchased at store 1, item returned at 2			
2	adjustment	6/9/2013	1		$0.00	0.00	item purchased at store 1, item returned at 2			

This window shows all quantities received for this bulk item. Fields and options in the **Quantities** tab include:

Unit of Measure	Specify how measure being stored (UOM, IUOM only).
Add	Use this button to create a new quantity row.
Adjust	Select an existing quantity row and use this button to edit its details. You can also double-click on the line item to edit.
Remove	Select an existing quantity row and use this button to delete it.

8. Select the row to edit and select adjust or double-click it. The **Item Quantities** window will appear.



Invoice # P-20070

Store Store #1

Memo

Received On 1/30/2012

	Received	In Stock
# Pieces	5	0

Price Each $850.00

Fields and options in the **Item Quantities** window include:

Invoice	The invoice number of the shipment being altered.
Store #	The store number in which the quantity resides.
Memo	Notes concerning the reason for the edit.
Received On	The date the items were received.
# Pieces Received	The number of pieces received on the specified invoice.
# Pieces In Stock	The number of pieces from that order that are still in stock.
Cost Each	The cost of each piece.
Price Each	The price of each piece.
Total Measure Received	The amount, for bulk sold in UOM, received.
Total Measure In Stock	The amount, for bulk sold in UOM, in stock after the order came.
Cost Per Measure	The cost, for bulk sold in units of measure, for each unit of measure.
Price Per Measure	The price, for bulk sold in units of measure, for each unit of measure.
Total Cost	The total cost for the amount entered from this invoice.
Total Price	The total price for the amount entered from this invoice.
Markup	The percentage markup.
See Cost	Returns the cost history of the items.

9. Edit the fields as needed and select **OK/Save & Close**.

- **An individual item number is assigned to each bulk item as it is sold. For example, at point of sale, if you sell item 900-00001. The receipt will show 900-1000001, which serializes this item, specific to this customer, so the item can be returned appropriately. On return, the individual item is deleted and the original bulk SKU is increased by the quantity of the return.**
- **When conducting a physical inventory of bulk items, the physical quantity counted is automatically adjusted against the previous in-stock count.**
- **Use Inventory ► Items ► Levels to manage bulk inventory by vendor.**

3.3.5.11 Bulk Item Supervisor Menu

The Supervisor menu in a bulk inventory item looks much like the fine item pricing Supervisor menu and includes tasks such as:

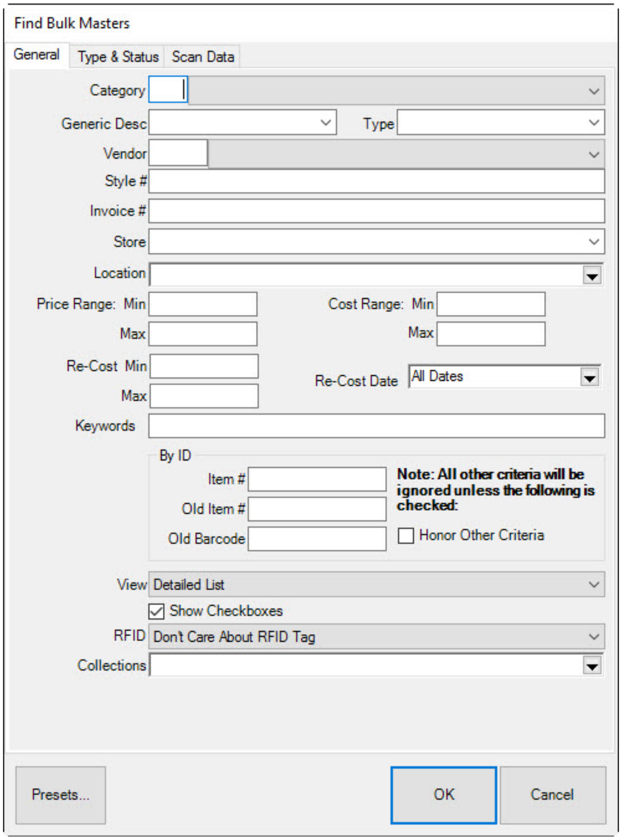
See Cost	Enables the cost fields to appear in the **General** and **Quantities** tabs.
See Re-Cost	Enables the replacement cost fields to appear in the **General** tab.
See Lowest	Enables the lost pricing field to appear in the **General** tab.

Change Pricing	Allows you to set a spiff on the bulk master record. Bulk pricing is modified through the **Quantities** tab.
Return to Vendor	Allows you to return a specified quantity of an item to the vendor.
Missing	Allows you to mark a specified quantity of an item missing.
Scrap	Allows you to mark a specified quantity of an item as scrap.
Fixup Status	Reconciles the status against transaction records.
Fixup Bulk Quantities	Reconciles bulk quantities against transaction records.
Merge Bulk	Allows you to merge bulk item records. For more information, see the section entitled Bulk Inventory Merge.
Cancel	Cancels out of this menu.

3.3.5.12 Bulk Inventory Merge

Found on the **Supervisor** menu at the bottom of the **Item** window of a bulk item, **Merge Bulk** allows you to merge duplicate bulk masters. To merge bulk inventory:

1. Starting from the record that you want to merge into, from the **Item Supervisor** menu, select **Merge Bulk**. The **Find Bulk Masters** window will appear. It operates much like the **Find Item** filter.



Re-Cost Date: All Dates

Note: All other criteria will be ignored unless the following is checked:

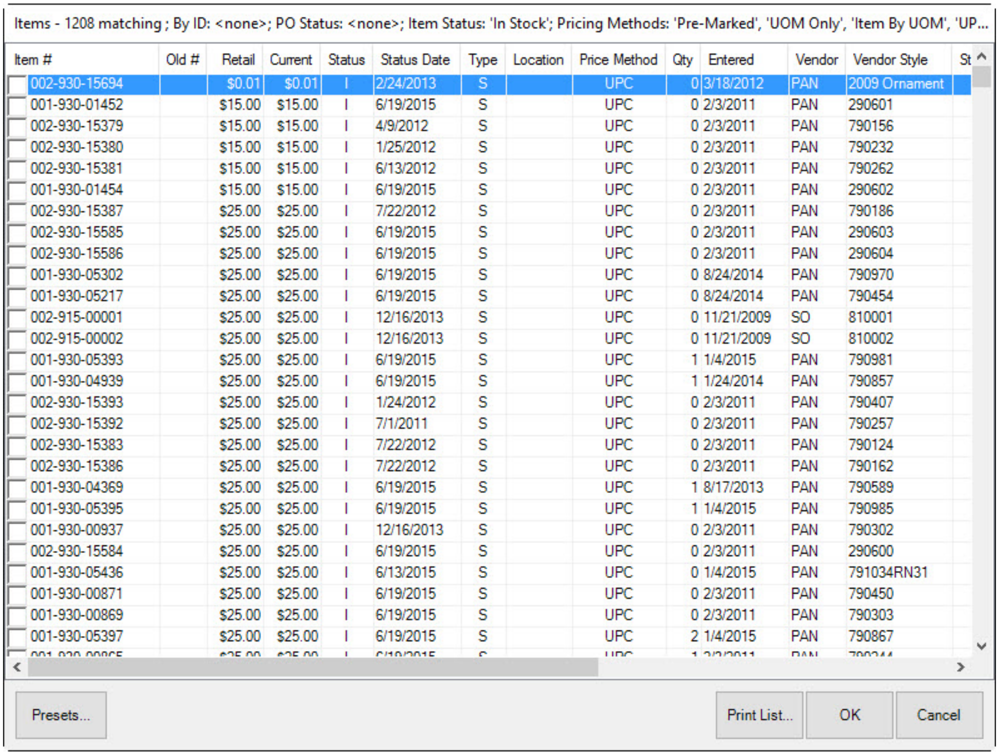
☐ Honor Other Criteria

View: Detailed List

☑ Show Checkboxes

RFID: Don't Care About RFID Tag

2. Complete the filter as desired to find items you want to merge in to this master and select **OK**. Matching results will appear.



Items - 1208 matching ; By ID: <none>; PO Status: <none>; Item Status: 'In Stock'; Pricing Methods: 'Pre-Marked', 'UOM Only', 'Item By UOM', 'UP...

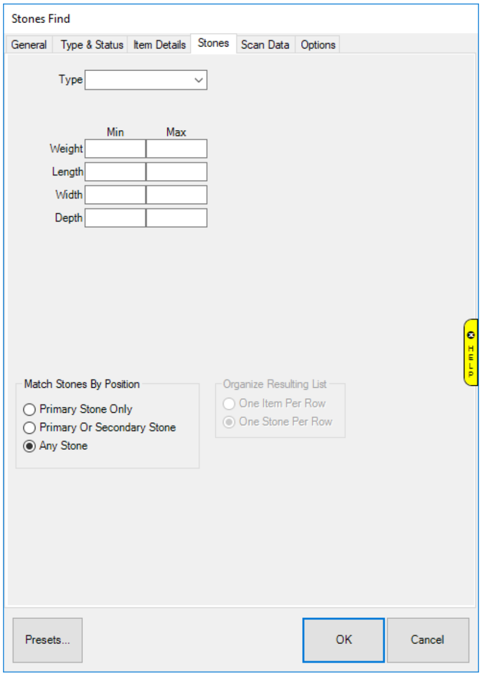
Item #	Old #	Retail	Current	Status	Status Date	Type	Location	Price Method	Qty	Entered	Vendor	Vendor Style	St
☐ 002-930-15694		$0.01	$0.01	I	2/24/2013	S		UPC	0	3/18/2012	PAN	2009 Ornament	
☐ 001-930-01452		$15.00	$15.00	I	6/19/2015	S		UPC	0	2/3/2011	PAN	290601	
☐ 002-930-15379		$15.00	$15.00	I	4/9/2012	S		UPC	0	2/3/2011	PAN	790156	
☐ 002-930-15380		$15.00	$15.00	I	1/25/2012	S		UPC	0	2/3/2011	PAN	790232	
☐ 002-930-15381		$15.00	$15.00	I	6/13/2012	S		UPC	0	2/3/2011	PAN	790262	
☐ 001-930-01454		$15.00	$15.00	I	6/19/2015	S		UPC	0	2/3/2011	PAN	290602	
☐ 002-930-15387		$25.00	$25.00	I	7/22/2012	S		UPC	0	2/3/2011	PAN	790186	
☐ 002-930-15585		$25.00	$25.00	I	6/19/2015	S		UPC	0	2/3/2011	PAN	290603	
☐ 002-930-15586		$25.00	$25.00	I	6/19/2015	S		UPC	0	2/3/2011	PAN	290604	
☐ 001-930-05302		$25.00	$25.00	I	6/19/2015	S		UPC	0	8/24/2014	PAN	790970	
☐ 001-930-05217		$25.00	$25.00	I	6/19/2015	S		UPC	0	8/24/2014	PAN	790454	
☐ 002-915-00001		$25.00	$25.00	I	12/16/2013	S		UPC	0	11/21/2009	SO	810001	
☐ 002-915-00002		$25.00	$25.00	I	12/16/2013	S		UPC	0	11/21/2009	SO	810002	
☐ 001-930-05393		$25.00	$25.00	I	6/19/2015	S		UPC	1	1/4/2015	PAN	790981	
☐ 001-930-04939		$25.00	$25.00	I	6/19/2015	S		UPC	1	1/24/2014	PAN	790857	
☐ 002-930-15393		$25.00	$25.00	I	1/24/2012	S		UPC	0	2/3/2011	PAN	790407	
☐ 002-930-15392		$25.00	$25.00	I	7/1/2011	S		UPC	0	2/3/2011	PAN	790257	
☐ 002-930-15383		$25.00	$25.00	I	7/22/2012	S		UPC	0	2/3/2011	PAN	790124	
☐ 002-930-15386		$25.00	$25.00	I	7/22/2012	S		UPC	0	2/3/2011	PAN	790162	
☐ 001-930-04369		$25.00	$25.00	I	6/19/2015	S		UPC	1	8/17/2013	PAN	790589	
☐ 001-930-05395		$25.00	$25.00	I	6/19/2015	S		UPC	1	1/4/2015	PAN	790985	
☐ 001-930-00937		$25.00	$25.00	I	12/16/2013	S		UPC	0	2/3/2011	PAN	790302	
☐ 002-930-15584		$25.00	$25.00	I	6/19/2015	S		UPC	0	2/3/2011	PAN	290600	
☐ 001-930-05436		$25.00	$25.00	I	6/13/2015	S		UPC	0	1/4/2015	PAN	791034RN31	
☐ 001-930-00871		$25.00	$25.00	I	6/19/2015	S		UPC	0	2/3/2011	PAN	790450	
☐ 001-930-00869		$25.00	$25.00	I	6/19/2015	S		UPC	0	2/3/2011	PAN	790303	
☐ 001-930-05397		$25.00	$25.00	I	6/19/2015	S		UPC	2	1/4/2015	PAN	790867	

3. Select the record you want to merge in and select **OK**.
4. Save the record for the merge to finalize.

3.3.6 Find Stones

Items can be looked up by stone. To do so:

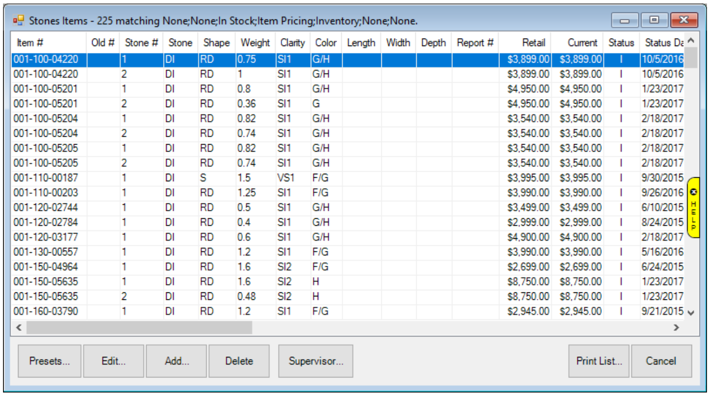
1. Select **Stones ► Find.** The **Stones Find** window will appear.



Match Stones By Position
○ Primary Stone Only
○ Primary Or Secondary Stone
● Any Stone

Organize Resulting List
○ One Item Per Row
● One Stone Per Row

2. The **Type** drop-down allows you to specify a stone; leave blank to include all stones.
3. The **Weight**, **Length**, **Width**, and **Depth** fields allow you to narrow your search by stone dimensions; leave blank to include all stones.
4. If you specify a **Type**, additional fields may appear to let you further filter by stone shape, color, etc. This will vary based on the type of stone and available characteristics.
5. Use the **Match Stones by Position** option to specify whether to search only primary stones, only primary and secondary, or all stones on an item.
6. Specify desired criteria and click **OK**. A list of matching items will be displayed with one row for each stone on the item.



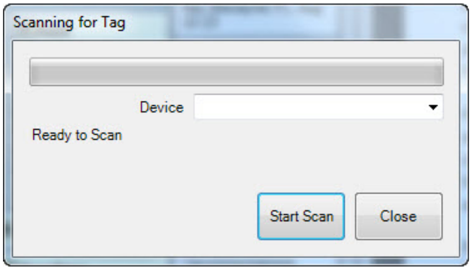
Stones Items - 225 matching None;None;In Stock;Item Pricing;Inventory;None;None.

Item #	Old #	Stone #	Stone	Shape	Weight	Clarity	Color	Length	Width	Depth	Report #	Retail	Current	Status	Status Da
001-100-04220		1	DI	RD	0.75	SI1	G/H					$3,899.00	$3,899.00	I	10/5/2016
001-100-04220		2	DI	RD	1	SI1	G/H					$3,899.00	$3,899.00	I	10/5/2016
001-100-05201		1	DI	RD	0.8	SI1	G/H					$4,950.00	$4,950.00	I	1/23/2017
001-100-05201		2	DI	RD	0.36	SI1	G					$4,950.00	$4,950.00	I	1/23/2017
001-100-05204		1	DI	RD	0.82	SI1	G/H					$3,540.00	$3,540.00	I	2/18/2017
001-100-05204		2	DI	RD	0.74	SI1	G/H					$3,540.00	$3,540.00	I	2/18/2017
001-100-05205		1	DI	RD	0.82	SI1	G/H					$3,540.00	$3,540.00	I	2/18/2017
001-100-05205		2	DI	RD	0.74	SI1	G/H					$3,540.00	$3,540.00	I	2/18/2017
001-110-00187		1	DI	S	1.5	VS1	F/G					$3,995.00	$3,995.00	I	9/30/2015
001-110-00203		1	DI	RD	1.25	SI1	F/G					$3,990.00	$3,990.00	I	9/26/2016
001-120-02744		1	DI	RD	0.5	SI1	G/H					$3,499.00	$3,499.00	I	6/10/2015
001-120-02784		1	DI	RD	0.4	SI1	G/H					$2,999.00	$2,999.00	I	8/24/2015
001-120-03177		1	DI	RD	0.6	SI1	G/H					$4,900.00	$4,900.00	I	2/18/2017
001-130-00557		1	DI	RD	1.2	SI1	F/G					$3,990.00	$3,990.00	I	5/16/2016
001-150-04964		1	DI	RD	1.6	SI2	F/G					$2,699.00	$2,699.00	I	6/24/2015
001-150-05635		1	DI	RD	1.6	SI2	H					$8,750.00	$8,750.00	I	1/23/2017
001-150-05635		2	DI	RD	0.48	SI2	H					$8,750.00	$8,750.00	I	1/23/2017
001-160-03790		1	DI	RD	1.2	SI1	F/G					$2,945.00	$2,945.00	I	9/21/2015

3.3.7 Find Item by RFID Tag

If you use RFID for inventory, you can use the RFID tag number to locate the item record. To do so:

1. Select **Inventory ►Items ►Find By RFID**. The **Scanning for Tag** window will appear.



2. Scan the tag. The Edge will search the database for the item number and return results a list with that item in it.

3.3.8 Consignment and Memo Items

Consignment and memo items are identified in The Edge as such via the **Stock Type** field in the item record. By properly selecting memo type or consignment type, The Edge can greatly improve the management of payables and accounting. Once the items are properly identified as consignment or memo, they will continue to be treated as such for the remainder of the accounting cycle. For example, if you’re integrated with QuickBooks, consignment and memo items can be mapped to special income and cost-of-good-sold accounts so that you may manage them differently from regular stock items. Consignment items and memo items are similar to each other in that both are liabilities while in your possession. Also, they will both generate a payment due after being sold, which is expressed by setting a payable date on the item record.

They differ in that memo items are owned by a vendor and consignment items are owned by a customer. Therefore, how you pay for these items will have a different process. For consignment items, there is a system option to automatically generate a credit memo to the owner when the item is sold. Memo items are paid for, albeit after the sale, like any other inventory bill when they become payable and is handled outside The Edge.

For the purposes of reporting, consignment and memo items are not considered part of stock until the item is sold and a payable is attached to the record.

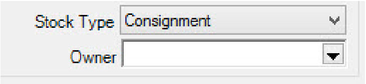
Consignment and memo sales follow this general process:

1. Item intake, where you indicate the type of item you have
2. Sell the item to a customer
3. Pay the owner or vendor.

3.3.8.1 Adding Consignment or Memo Items

When you receive a consignment or memo item, use the same process as described in the section entitled Working with Item Records, except from the **General** tab, select `Consignment` or `Memo` from the **Stock Type** drop-down list.

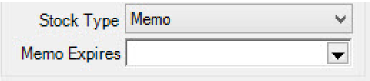
Consignment



Stock Type: Consignment

For a consignment item, you will be asked to identify the owner using the **Customer Find** filter. This indicates who should be paid when the item sells. Without that information, The Edge will not allow you to save the record. Like any other item, for the integrity of management reporting, consignment items require a vendor entry. We recommend that you create a single vendor called `Consignment`.

Memo



Stock Type: Memo

A memo item has an option to indicate an expiration date, which is the date it is due back to the vendor if unsold. The item’s Vendor Return Memo feature allows you to send all memo items based on the **Memo Expires** value.

3.3.8.2 Finding and Reporting on Consignment and Memo Items

To work with consignment and memo items, for example, to determine what payments are due, use the **Item Find** feature. In the **Type & Status** tab, under **Inventory Type**, deselect **Inventory** and select **Memo** or **Consignment**. You can also specify the dates or a specific owner or vendor.

3.3.8.3 Working with QuickBooks and Consignment and Memo Items

To ensure the proper mapping of consignment and memo inventory as liabilities and to facilitate payments, be sure to map The Edge consignment and memo items to the proper QuickBooks accounts. By selecting the appropriate stock type, your item will adhere to the appropriate accounting activities as set up in your accounting system.

See the section entitled Mapping The Edge with QuickBooks Accounts for more information.

3.3.8.4 Consignment and Memo Items Returned to Stock

If the item is returned, the user must determine whether the item has been paid for and is now owned merchandise or whether it is still under memo or consignment liability. The Edge treats a returned consignment or memo item as owned merchandise because a payable date was set and is accounted for. To remove a payable date, go to the item record **Supervisor** menu and select **Remove Payable**.

3.3.8.5 Consignment and Memo Items Returned to Vendor

To return a memo item to the vendor, use the process described in the section entitled Return to Vendor.

To return a consignment item to the customer, remove the item from inventory as with any other item by marking it Return to Vendor. The difference is that you refer to the **Owner** field to determine to whom it should be returned.

3.3.9 Assembling an Item

The Edge allows you to assemble new items from existing inventory while retaining full details of the individual parts involved. It also allows you to disassemble items into their component parts while keeping a record of the original piece. Part records are automatically cross-referenced in the software so that if you look up an item that has been consumed as a part towards an assembled piece, that part item will have a link to the final piece and vice-versa. Check your **System Options** to ensure these features are turned on.

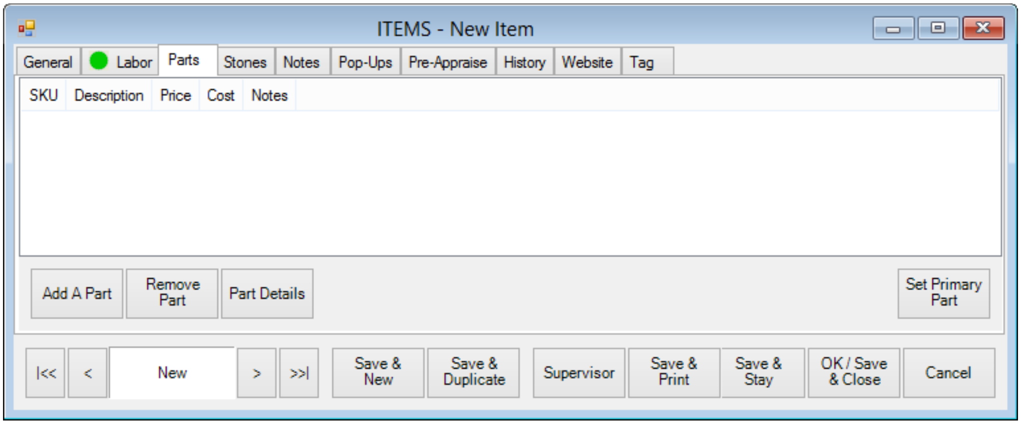
There are three ways to assemble items:

Assemble	Allows you to create a built or assembled item from scratch.
Template	Allows you to create a built or assembled item from a template using the **Add Template** option. Templates are created from the **Supervisor** menu of the original item by selecting **Create Template**. It is useful to create a template for a specific set of tasks that might later be used as part of a larger effort, e.g., welding or mounting. You can make changes after you've pulled in the template.
Previous	Allows you to duplicate a previously built or assembled item. You can make changes after you've pulled in the previously assembled item.

3.3.9.1 Creating an Assembled Item from Scratch

To create a new item assembly:

1. Select **Inventory ▶ Items ▶ Assemble**. The **New Item** window will appear with the **Parts** tab open.

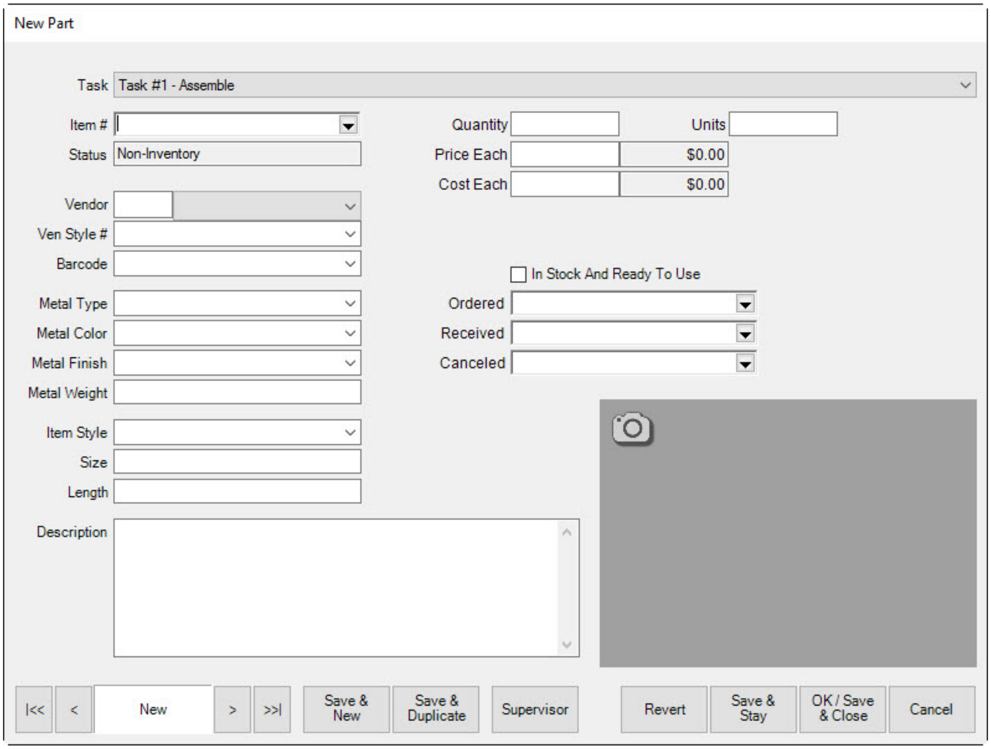


Options in the **Parts** tab include:

Add A Part	Allows you to add a part that is required for the assembly.
Remove Part	Allows you to remove a part from the list.
Part Details	Allows you to view the part details entered when the part was added.
Set Primary Part	Allows you to indicate that a part is primary to the piece.

If this option is selected, then the resulting item details fields will be populated according to this part; this also means that the resulting item category will match this part category.

2. To add a part, from the **New Item ▶ Part** tab, select **Add a Part**. The **New Part** window will appear.



New Part

Task: Task #1 - Assemble

Status: Non-Inventory

Price Each: $0.00

Cost Each: $0.00

☐ In Stock And Ready To Use

Fields and options in the **New Part** window include:

Task	Labor or other task associated with working with this part. Each part must be associated with the task that first attaches the part to the finished item.
Item #	If an inventory item, the item ID for the part.
Status	Whether the part is in inventory.
Quantity	The quantity of the part required for the assembly. The second quantity field is only used when measure is involved. When using melee diamonds, you would specify both the number of stones (quantity) and the total weight (measure).
Units	The unit of measure of for the quantity; this will apply to bulk item parts.
Price Each	Pricing information for this part. They will automatically populate for inventory parts and will need to be filled in for non-inventory parts. You will be prompted to confirm this. The exception to this is when adding bulk parts as quantity will be required.

Cost Each	The cost of the part. This is populated automatically based on the entries you made. To specify cost for non-inventory items, select **Supervisor ► See Cost**.
Vendor	The vendor from whom the part is to be obtained.
Vendor Style #	The vendor's style number. Optional.
Barcode	The barcode of the part. Optional.
Metal Type	If made of metal, the metal type. Optional.
Metal Color	If made of metal, the metal color. Optional.
Metal Finish	If made of metal, the metal finish. Optional.
Metal Weight	If made of metal, the metal weight. Optional.
Item Style	The item style (motif) of the part. Optional.
Size	The size of the part. Optional.
Length	The length of the part. Optional.
In Stock and Ready to Use	Used to indicate that this item is in inventory and ready to be part of the assembly job. This box gets automatically checked when adding inventory parts. Optional.
Ordered	Whether the part was ordered. Optional.
Received	Whether the part has been received. Optional.
Canceled	Whether the order was canceled. Optional.
Camera icon (📷)	Displays photo menu to capture one or more images of the item.
Description	A description of the part beyond the fields described above.

When adding a part from inventory, many fields will automatically be populated with the details from the item record you specify. You cannot change them. When adding a non-inventory part, these fields will remain blank. You can fill out as many or as few as you like. The only required field is **Description**.

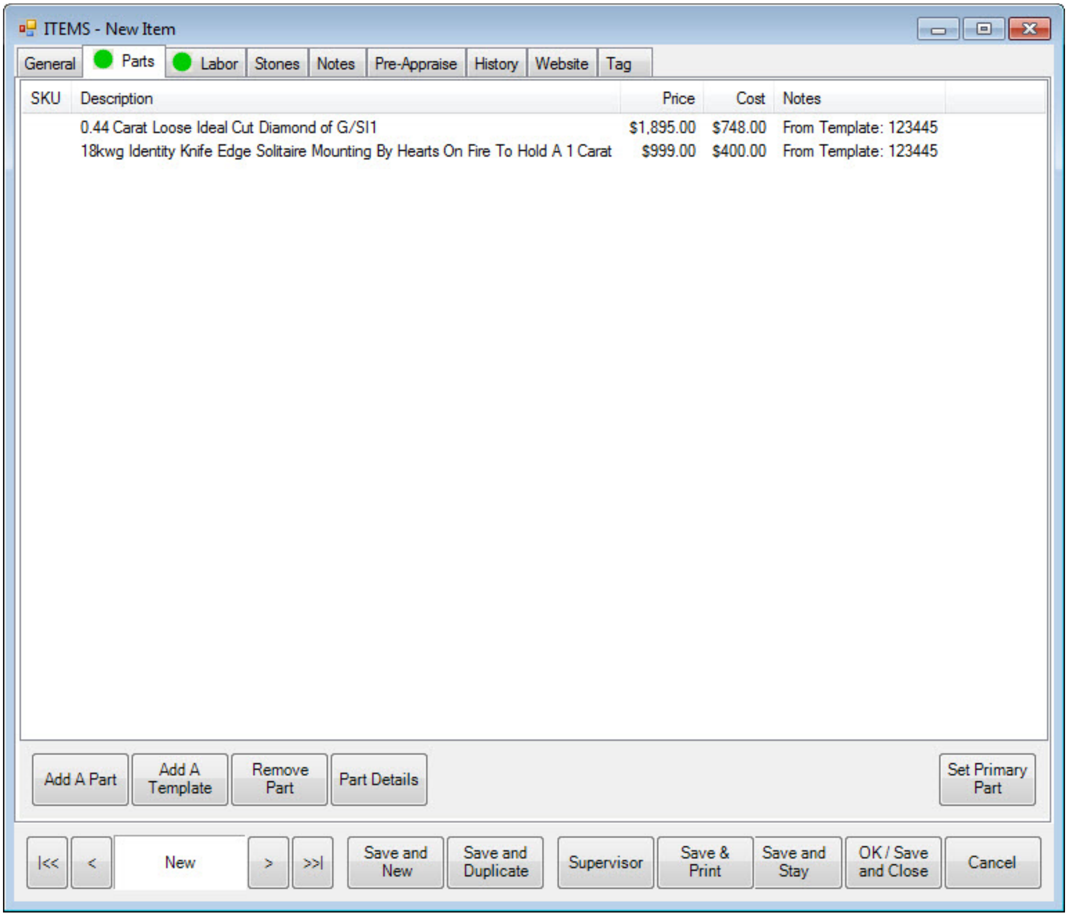
3. Use the **Task** drop-down menu to choose which labor task first attaches the part to the finished item.

By default, when you create a new assembly item, there is one labor task created called Assemble. Use this drop-down to add additional tasks.

4. If an inventory item is to be used as a part, select that item from the **Item Number** field. You can enter the item number directly or select from the **Item Number** drop-down menu. For non-inventory parts, skip this field.
5. Complete remaining fields as appropriate.
6. Once all part information has been entered, select one of the **Save** options to finish adding that part.

When adding multiple parts, use the Save & New button to save the current part and immediately open a New Part window to add the next part.

7. Added parts will appear in the **Parts** tab. Inventory items will appear with their SKU number while non-inventory items will just appear with their description.



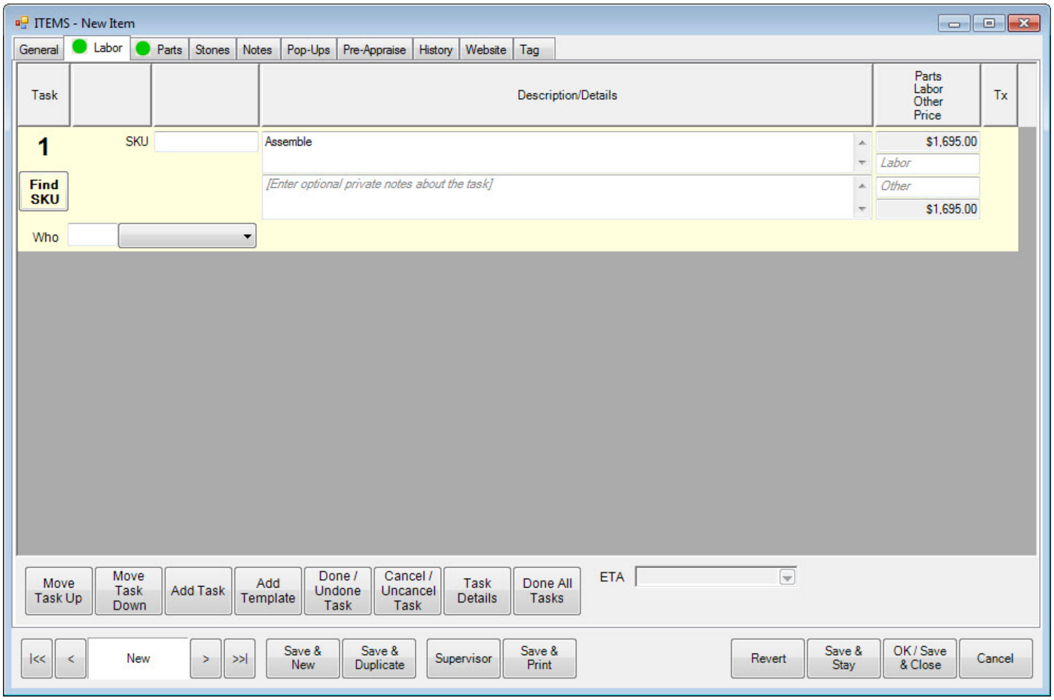
SKU	Description	Price	Cost	Notes
	0.44 Carat Loose Ideal Cut Diamond of G/SI1	$1,895.00	$748.00	From Template: 123445
	18kwg Identity Knife Edge Solitaire Mounting By Hearts On Fire To Hold A 1 Carat	$999.00	$400.00	From Template: 123445

8. To access the **Part Details** window, select a part and select **Part Details**. This window is identical to the **New Part** window. Use this to make changes to existing parts.
9. Use **Set Primary Part** to specify a part to be the **Primary Part** of this assembled piece. The Edge will automatically copy key details from the primary part (such as vendor and style). This is optional.

Important!

With IUOM and PRE inventory used as parts, it is important to treat consumption for service jobs to account for both the amount (ct, grams, etc.) and the quantity (1 diamond, 1 piece, etc.) For service, it means creating a part line for each part and enter the unit of measure. For example, if you use three .10-ct diamonds for a job, you must specify this by adding three separate parts, each being .10 carats. Do not add one part of .30 carats as this would not properly reduce the physical quantity available in stock and your resulting inventory would be off.

10. The Edge allows you to detail and account for the labor required to assemble an item. To add labor associated with a task, select the **Labor** tab from the **New Item** window. It will appear with an automatically generated labor task named "Assemble."



Description/Details: Assemble

Parts: $1,695.00

Price: $1,695.00

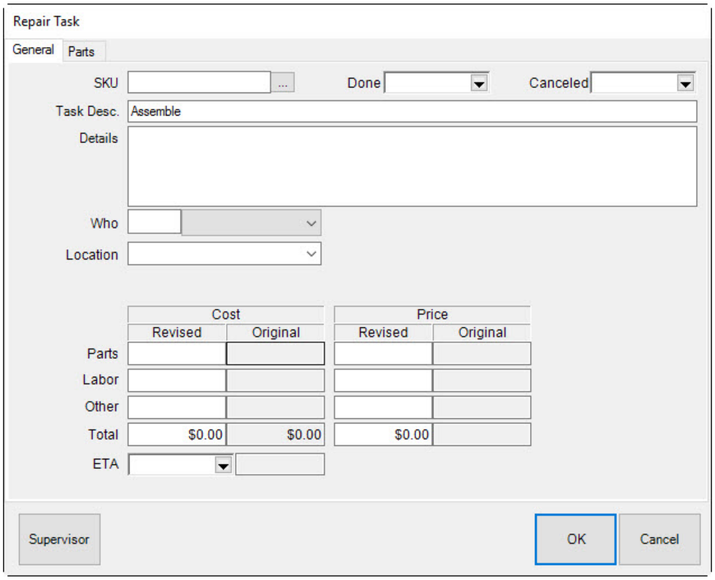
The **Assemble** task automatically includes a price for the parts (items) being assembled together. You may also specify labor or other pricing associated with this task. The **Parts**, **Labor**, and **Other** prices for all tasks will be summed and suggested as a new price for the assembled item when the item is saved. You can add additional tasks to the assembly by selecting **Add Task**.

Options in the **Labor** tab include:

Move Task Up	To ensure chronological order of tasks, use this to move a task up in the list.

Move Task Down	To ensure chronological order of tasks, use this to move a task down in the list.
Add Task	Add an additional labor task.
Add Template	Adds a template to this job. It will add one or more tasks and one or more parts to this job as created from a previous assembly using the **Supervisor** menu.
Done/Undone Task	Mark the task `Done` or `Undone`.
Cancel/Uncancel Task	Remove the task from the list.
Task Details	Opens the **Task Details** window so you can make changes or add parts for the specific task.
Done All Tasks	Marks all tasks in the list `Done` and moves it into stock.
ETA	The estimated date the work should be complete.

11. If there is a labor charge associated with this assembly, you can enter the amount into the **Labor** field.
12. To add specific steps to the labor, select **Add Task**. A new task line will appear.
13. Enter appropriate notes for the task.
14. To enter additional details, select **Task Details**. The **Task Details** window will appear.



Task Desc. Assemble

	Cost		Price	
	Revised	Original	Revised	Original
Parts				
Labor				
Other				
Total	$0.00	$0.00	$0.00	

15. Make the desired changes, including adding task-specific part information in the parts tab, and select **OK**. You’ll be returned to the **New Item** window.

In Assemble Item, the Add button on the Stone tab is disabled. You cannot directly add stones to this assembled piece. Instead, any stones must be added under the Assembled tab as a part. We do not recommend using non-inventory items to represent stone parts because they lack the supporting inventory record and therefore the stone information will not appear on the Stones tab of the final assembled item. Instead, you should add the stone to inventory so they can be added as inventory parts. Stones will be moved to the Stones tab after the item is complete.

16. After entering part and labor details, you must complete the assembled item entry on the **General** tab. This is described in more detail in the section entitled Adding an Item. You may complete other tabs described there as well.
17. Select **OK/Save & Close**.
18. To save the item as a template, from the **Item** window **Supervisor** menu, after the item has been saved, select **Create as a Template and select Save & Close**.
19. You will be prompted to print an envelope. Select **Yes** to print an envelope if needed.

On saving this newly assembled piece, all of its parts that came from inventory will have their status changed from **In Stock (I)** to **Consumed (U).** Additionally, there will be a new button visible on the consumed part's item record that links to the assembled piece.

3.3.9.2 Creating an Assembly Template

Templates are useful for frequently assembled items or items with similar assemblage. All the tasks and parts are imported to the new item, along with the description. To create a template:

1. Open the assembly that you want to make the template (it can be the resulting item record when you completed an assembly).
2. From the **Supervisor** menu, select **Create as a Template**.
3. Select **Save & Close**. The template will be named after the vendor style number. Certain options in the **Item** window will no longer be available, but the template will be available for future assemblies.

The parts identified in a template are placeholders. You must specify actual parts so they will match actual inventory.

3.3.9.3 Creating an Assembled Item from a Template

To create a record for an item assembled from a template:

1. From the **Inventory** menu, select **Item ► Assemble**. The **New Item** window will open.
2. From the **Labor** tab, select **Add Template**.
3. Use the item filter to locate the template. Note that only templates that were marked as such in the **Item ► Supervisor** menu will be found.

4. Repeat steps 2 and 3 as needed.
5. Add additional parts and tasks as needed and as described in the section entitled Creating an Assembled Item from Scratch.
6. Save the item. You will be prompted to print an envelope.
7. Select **Yes** if desired.

3.3.9.4 Creating an Assembled Item from a Previous Item

To create a record for an item assembled from a previous item:

1. From the **Inventory** menu, select **Item** ► **Find**.
2. Find and open the item from which you wish to create the new item.
3. Select **Save and Duplicate**.
4. Make changes as needed and save the record.

3.3.9.5 Assembled and Built Item Supervisor Menu

Two functions available in the Assemble and Build Supervisor menu in addition to other item functions.

Change to Work in Progress	Allows you to indicate that the item is not done and should not be put into stock.
Change to In-Stock	Allows you to indicate that the item should be considered done and put into stock. This will automatically mark all the tasks associated with the job as "done."

3.3.10 Building Items

Building items differs from assembling them in that it is designed to build items of your own design, for your own product line or brand, with separate accounting and controls, whereas assembly is better suited for simple pairing of parts such as a semi mount and a center stone.

While an item is under construction, it is labeled as Work in Progress (W) in the item database. It will be changed to in-stock after the item is complete.

Built items must use a store-created vendor, such as My Brand, which you should create in Inventory ► Vendors.

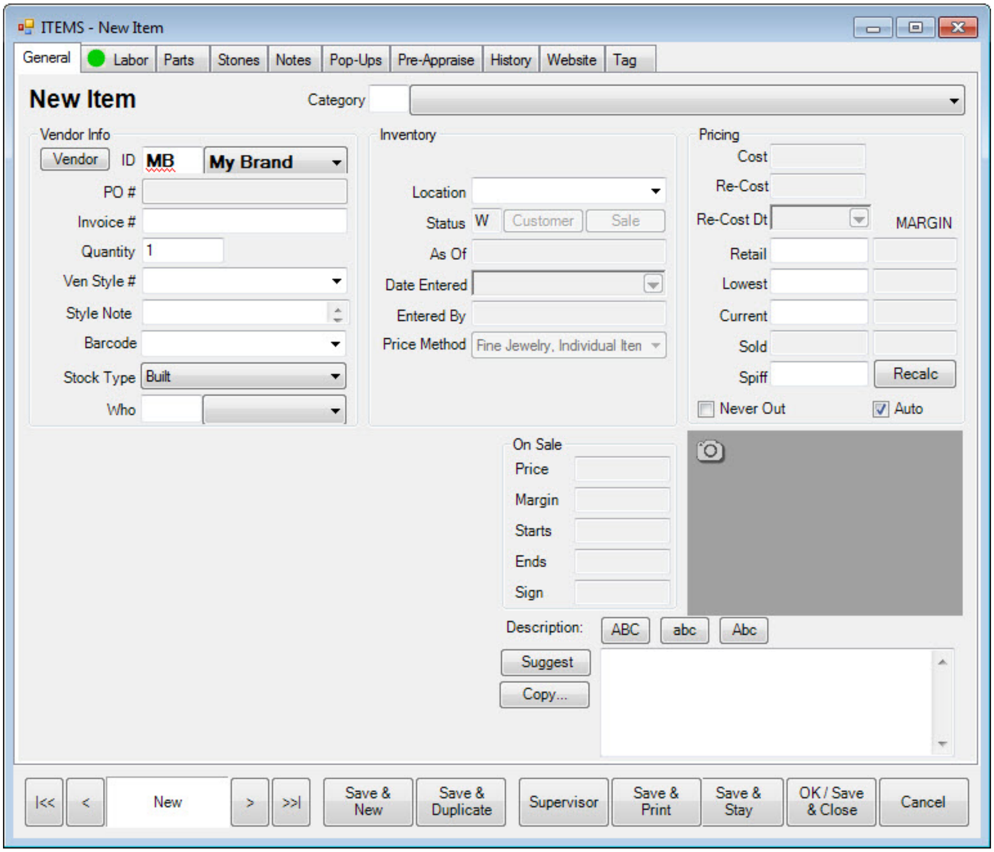
While an item is under construction, it is labeled as Work in Progress (W) in the item database. It will be changed to in-stock after the item is complete.

For a video tutorial about working with building items, go to http://www.screencast.com/t/w796zMHTQRxk.

3.3.10.1 Creating a Built Item from Scratch

To create a record for a build item:

1. From the **Inventory** menu, select **Items** ► **Build** ► **From Scratch**. The **New Item** window will appear with the **General** tab open. Notice that the **Vendor** field is populated by default with a list of “My Brand” vendors.



ITEMS - New Item

New Item

ID: MB — My Brand

Quantity: 1

Stock Type: Built

Status: W

Price Method: Fine Jewelry, Individual Iten

☐ Never Out

☑ Auto

2. Complete the fields as needed for the item record.
3. Select the **Parts** and **Labor** tabs and add parts and labor as described in the section entitled Creating an Assembled Item from Scratch.
4. If you wish to save this item as a template, select **Supervisor** ► **Create as a Template**. The template will be named according to the vendor style number.
5. You will be prompted to print an envelope. Select **Yes** to print an envelope if needed.

3.3.10.2 Creating a Built Item from Template

Templates are useful for frequently build items or items with similar construction.

To create a template, from the **Item** window **Supervisor** menu, after the item has been saved, select **Create as a Template and select Save & Close**. The template will be named after the vendor style number. Certain options in the **Item** window will no longer be available, but the template will be available for future work.

To create a record for an item build from a template:

1. From the **Inventory** menu, select **Build ► From Template**. The **Build Item Template Find** filter will appear. It works like the **Item Find** filter. Note that only templates that were marked as such in the **Item ► Supervisor** menu will be found.
2. Enter filter parameters as desired and select **OK**. A list of templates will appear.
3. Select the template with which you wish to work and select **Select**. The **New Item** window will open.
4. Create the build item in the **Parts** and **Labor** tabs as described in the section entitled Creating an Assembled Item from Scratch.
5. To incorporate another template, from the **Labor** tab, select **Add Template**.
6. Save the item. You will be prompted to print an envelope.
7. Select **Yes** to print an envelope if needed.

3.3.10.3 Creating a Built Item from Previous

To create a record for an item build from a previous item:

1. From the **Inventory** menu, select **Build ► From Previous**. The **Item Find for Previous Built Items** filter will appear. It works like the **Item Find** filter. Results will include templates but you do not have to use a template. Also, by default, **Built** will be selected in the filter, but it can be any item type. Built or assembled items will bring up tasks; other item types will have no tasks.
2. Enter filter parameters as desired and select **OK**. A list of previously built items will appear.
3. Select the item you wish to replicate and select **Select**. The **New Item** window will open.
4. Proceed with creating the item in the **Parts** and **Labor** tabs as described in the section entitled Creating an Assembled Item from Scratch.
5. You will be prompted to print an envelope. Select **Yes**.

3.3.11 Finding Built or Assembled Items and Parts

Because they result in items, assembled and built items and their parts can both be searched for with the standard inventory **Find** filter by going to **Inventory ► Items ► Find**. For the convenience of your shop staff, these jobs can also be found under **Services ► Find ► Job**.

To search for assembled or built items in inventory, check the **Assembled** or **Built** boxes on the **Type & Status** tab of the **Find** filter. As always, the **Presets** feature allows you to save search parameters for future use. See the section entitled Presets for more information.

To search for items that have been associated with a job but are still be in the store and might possibly be taken away from the job for some other purpose, check the **Consumed Here** box on the **Type & Status** tab of the **Find** filter. In contrast, the **Consumed Gone** status will show parts that have been consumed but are not available for repurposing.

3.3.12 Editing Built or Assembled Items

You can review and edit assembled and built items in inventory. To do so, first find the item in inventory and edit it. Assembled items will have slightly different tabs. To review the assembly details of assembled items, select the **Parts** and **Labor** tabs as described in Creating an Assembled Item from Scratch.

To edit or review the details of a part, select it and select **Part Details** on the bottom of the assembled tab. To review the labor details, click the **Labor** tab from the assembled tab.

It may be necessary to cancel a work in progress before it is complete, but after the record is created. When you do this, if there are parts attached to the built item, you will be prompted to indicate what to do with the parts that have been allocated to it. This window allows you to put the items back in stock or scrap them.

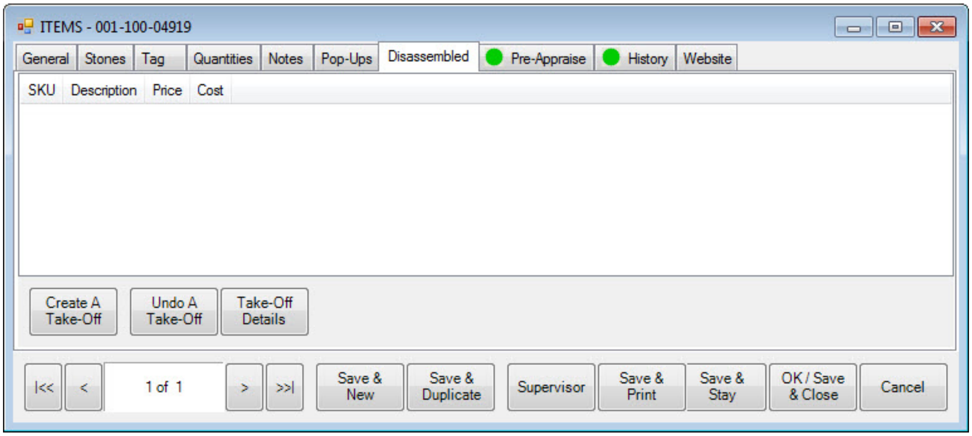
If you create a build item and have not allocated any parts or completed any tasks, when you cancel it, the item becomes deleted. You will not be asked to re-allocate parts because none were specified. If tasks are completed or a part is allocated from inventory, you will only be able to cancel the job; the item will still exists as cancelled.

3.3.13 Item Disassembly

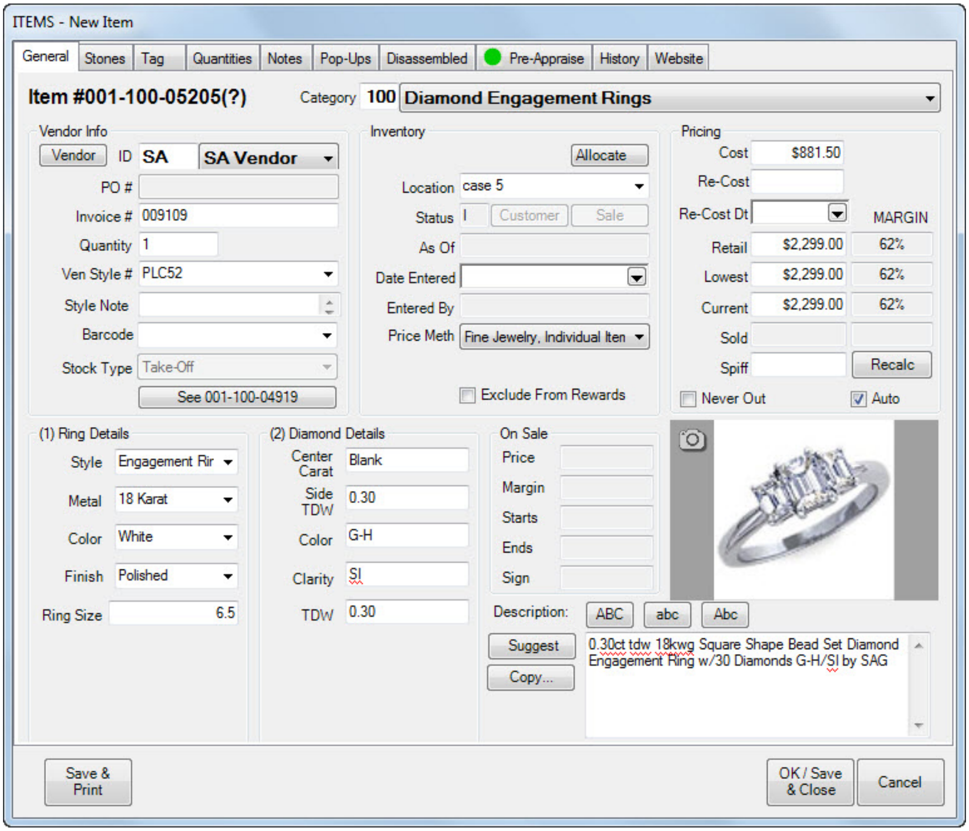
3.3.13.1 Disassembling a Stock Item

The take-off, or disassembly, process consists of finding and editing an in-stock item you want to disassemble. To disassemble a stock item:

1. Use **Item ► Find**, described in the section entitled Finding and Editing an Item, and open the record of the desired item.
2. Go to the **Disassembled** tab.



3. From the bottom left corner, select **Create a Take-Off**. The **New Item** window will appear.



Item #001-100-05205(?)
Category 100 Diamond Engagement Rings

Vendor Info
ID SA SA Vendor
PO #
Invoice # 009109
Quantity 1
Ven Style # PLC52
Style Note
Barcode
Stock Type Take-Off

Inventory
Location case 5
Status I
As Of
Date Entered
Entered By
Price Meth Fine Jewelry, Individual Iten
☐ Exclude From Rewards

Pricing
Cost $881.50
Re-Cost
Re-Cost Dt

		MARGIN
Retail	$2,299.00	62%
Lowest	$2,299.00	62%
Current	$2,299.00	62%
Sold		
Spiff		

☐ Never Out ☑ Auto

(1) Ring Details
Style Engagement Rir
Metal 18 Karat
Color White
Finish Polished
Ring Size 6.5

(2) Diamond Details
Center Carat Blank
Side TDW 0.30
Color G-H
Clarity SI
TDW 0.30

On Sale
Price
Margin
Starts
Ends
Sign

Description: 0.30ct tdw 18kwg Square Shape Bead Set Diamond Engagement Ring w/30 Diamonds G-H/SI by SAG

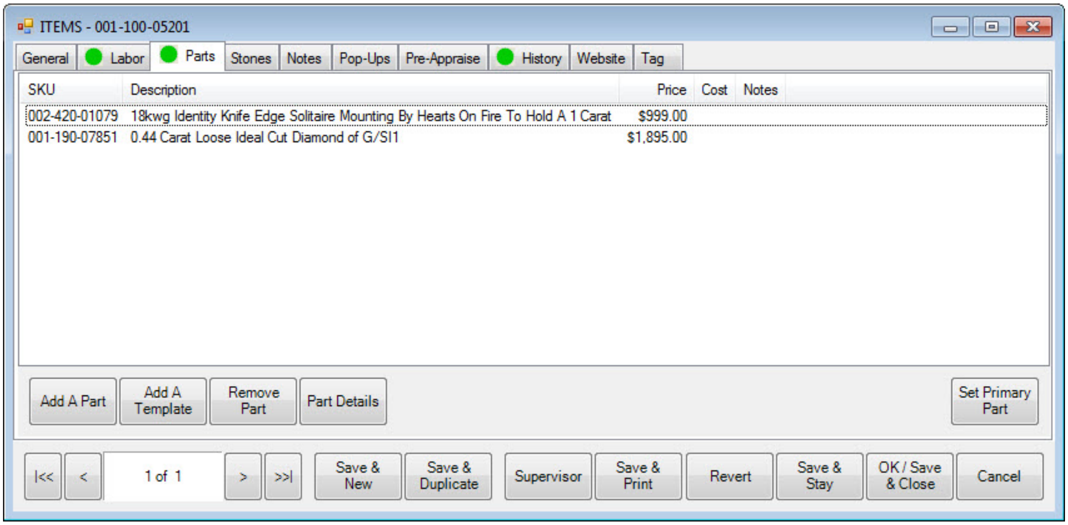
A take-off is a new component that you are taking away from the original item. You should create a new take-off for each part that the item is getting broken down into. For example, if you were disassembling a ring with a single diamond mounted, you would create two take-offs: one for the diamond and one for the ring mount. You can create as many take-offs as necessary to completely account for the disassembly of an item. The full details of the original piece you are disassembling will be automatically copied into this **New Item** window.

4. Modify these details so that this new item represents one part of the original item.
5. When finished modifying, select **OK** or **Save & Close** to add this as a **Take-Off**.
6. Repeat this process to create each of your component parts.
7. To view take-off details, select **Take-Off Details**.
8. To remove a take-off from a disassembly, select **Undo A Take-Off**.

3.3.13.2 Disassembling an Assembled Item

Disassembling an item you had previously assembled in the store is a different process from disassembling a stock item. You do not make use of the **Disassembled** tab or create **Take-Offs**.

To disassemble an assembled item, start by finding and editing it in inventory. Then, go to its **Parts** tab. Here you will be presented with a list of the individual parts that were used to make up this item.



ITEMS - 001-100-05201

SKU	Description	Price	Cost	Notes
002-420-01079	18kwg Identity Knife Edge Solitaire Mounting By Hearts On Fire To Hold A 1 Carat	$999.00		
001-190-07851	0.44 Carat Loose Ideal Cut Diamond of G/SI1	$1,895.00		

Use the **Remove Part** button to individually remove each part from this item. For stock parts, they will be restored to in stock status in inventory under their original stock number. Miscellaneous parts will be removed without affecting any inventory since they never existed in inventory in the first place. You can add them as new items (with a backdated entry date) if you wish.

Even after removing all parts, the inventory record will remain. You should delete it to avoid any confusion.

3.3.14 Collections

The Edge Collections feature allows you to group items as part of a collection. An item can belong to more than one collection. Once the item has been designated as part of a collection, that information can be used for marketing, reporting, and suggestive selling. For example, a collection item sold at point of sale can be set to prompt the salesperson to offer additional pieces in the collection. Another use for the Collections feature is to help identify items that were presented together as part of a sale flier or catalog.

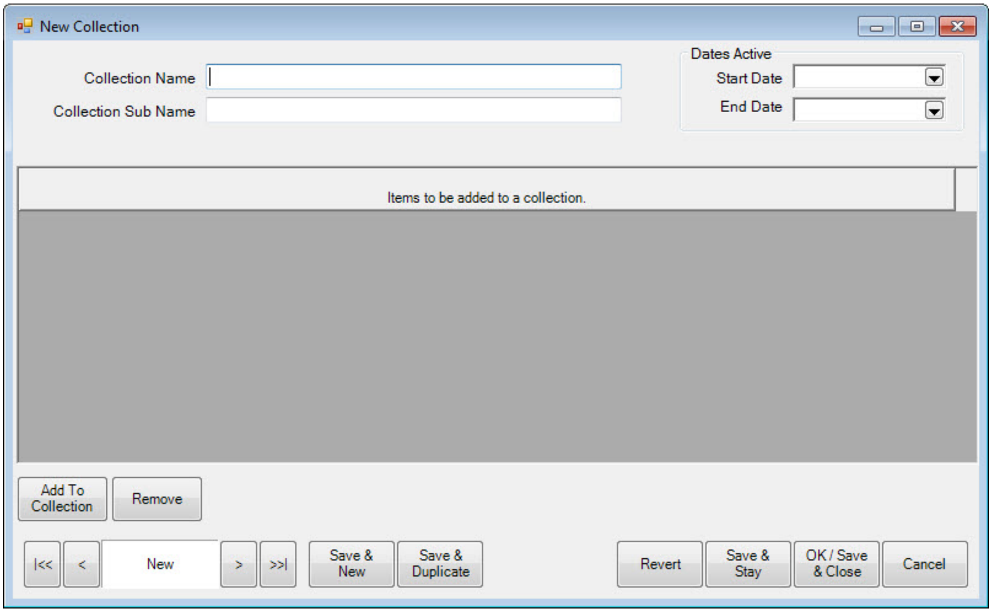
There is not a specific report for collections, but because Collections is now a filter item in the **Item Find** filter, which is also used for inventory reports. These allow you to obtain data concerning the success of a particular collection, whether it be a product line or items featured in a particular promotion. Coupling the Collections option in the filter and the Collections group-by option, you can obtain a variety of information concerning collections.

Collections can be enabled or disabled through **System Options**.

3.3.14.1 Creating Collections

To create a new collection:

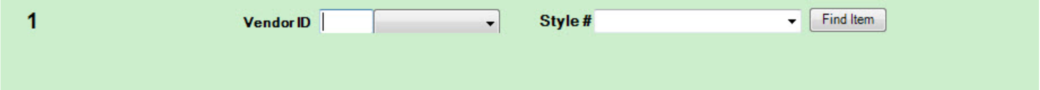
1. From the **Inventory** menu, select **Items** ► **Collections** ► **Add**. The **New Collection** window will appear.



Fields and options in the **New Collection** window include:

Collection Name	The name for the collection.
Collection Sub Name	The name for a sub-collection, if desired.
Start Date	The date the items in the collection will begin to pop-up at point of sale. If this is left blank, the collection will start immediately.
End Date	The date the items in the collection will cease to pop-up at point of sale. If this is left blank, the collection will continue indefinitely.
Add to Collection	Used to add an item to the collection.
Remove	Removes the item from the collection. It does not change the inventory status.

2. Enter a name for the collection.
3. Enter a name for the sub-collection, if desired.
4. Use the date pickers to select a start and end date for the collection if desired. If the end date needs to be extended, or is you wish to reactivate the collection, change these dates as needed.
5. At least one item must be added; select **Add To Collection**. A collection line item will appear.



6. Locate the desired vendor using the **Vendor** drop-down menu.
7. Locate the desired style number using the **Style** drop-down menu. Alternatively, use the **Find Item** option to locate an item using the **Item Find** feature.

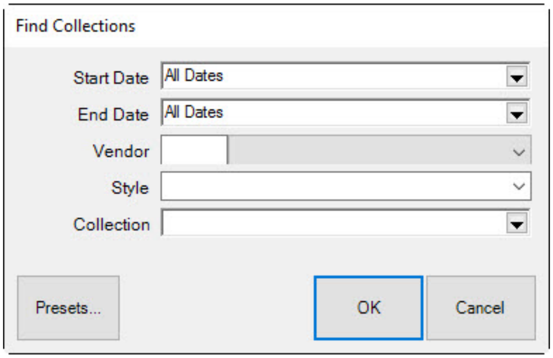
To quickly enter items into the collection, scan them in.

8. Repeat as needed to add all the items to the collection.
9. Select **OK/Save & Close**. The items can now be found when searching by collection using the Item Find feature. Also, the collection items will now appear as suggestions at point of sale, provided **System Options** are set accordingly.

3.3.14.2 Finding and Editing Collections

To change the content or dates of a collection:

1. From the **Inventory** menu, select **Items ► Collections ► Find**. The **Find Collections** filter will appear. As always, the **Presets** feature allows you to save search parameters for future use. See the section entitled Presets for more information.



Start Date: All Dates
End Date: All Dates

Fields and options in the **Find Collections** filter include:

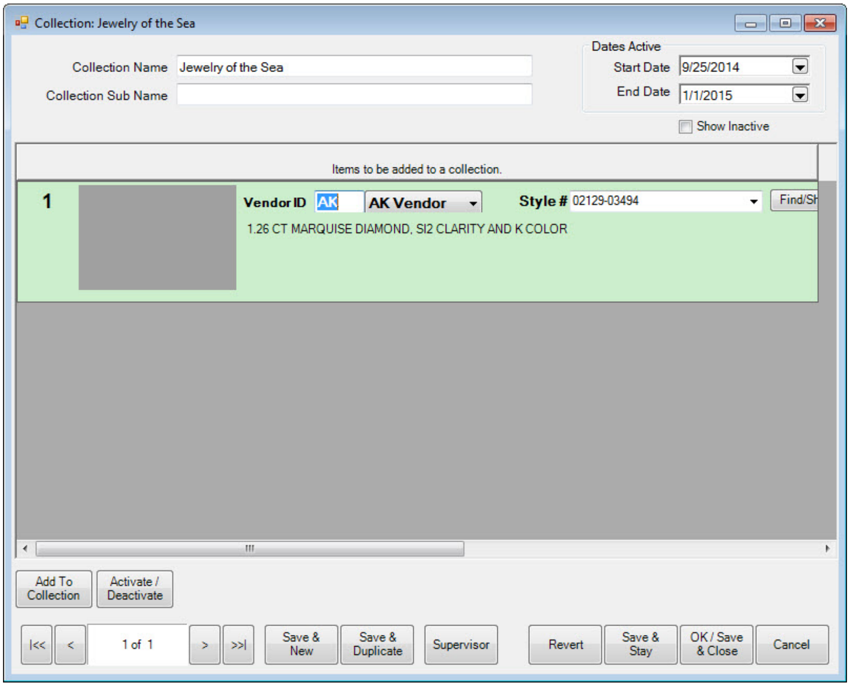
Start Date	Returns collections with a matching start date range.
End Date	Returns collections with a matching end date range.
Vendor	Returns collections that contain items from this vendor.

Style	Returns collections that contain this style number.
Collection	Returns collections with matching key words in the name of the collection.

2. Select parameters as desired.
3. Select **OK**. A list of matching collection records will appear. From there you can edit a collection or add another collection.

To edit or add items to a collection:

1. From the results provided by the **Collection Find** function, select a collection record and double click it. The **Collection** window will open; it will contain the same fields as described in the section entitled Creating Collections.



Collection: Jewelry of the Sea

Collection Name: Jewelry of the Sea

Collection Sub Name:

Dates Active

Start Date: 9/25/2014

End Date: 1/1/2015

☐ Show Inactive

Items to be added to a collection.

1 Vendor ID: AK AK Vendor Style #: 02129-03494

1.26 CT MARQUISE DIAMOND, SI2 CLARITY AND K COLOR

2. Make changes as required.
3. Select **OK/Save & Close**.

3.3.15 Inventory Levels

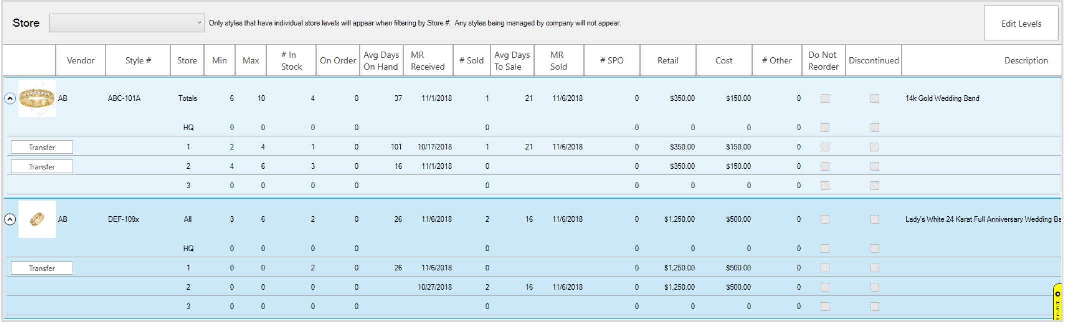
The **Levels** function allows you to view your inventory on a vendor and style basis. This works in concert with the Rapid Reorder form, and in turn, the Purchase Order feature, to help you maintain optimum inventory levels. It is also a useful tool for monitoring stock quantities and also offers a fast way to gauge a particular style's performance by displaying some of the more pertinent statistics.

Additionally, it allows you to set minimum and maximum stock levels per style to ensure they are never out of stock. Levels are best when initially set in the **General** tab item record.

The **Levels** feature operates much like the **Find Items** function, though it is most useful when used in a broad sense, such as to view the performance of an entire category or specific vendor.

To work with levels as a group:

1. Use **Items ► Levels**, using a filter similar to that described in the section entitled Finding and Editing an Item, to find a list of items matching your criteria. The Levels interactive grid will appear.



Store

Only styles that have individual store levels will appear when filtering by Store #. Any styles being managed by company will not appear.

	Vendor	Style #	Store	Min	Max	# In Stock	On Order	Avg Days On Hand	MR Received	# Sold	Avg Days To Sale	MR Sold	# SPO	Retail	Cost	# Other	Do Not Reorder	Discontinued	Description
	AB	ABC-101A	Totals	6	10	4	0	37	11/1/2018	1	21	11/6/2018	0	$350.00	$150.00	0	☐	☐	14k Gold Wedding Band
			HQ	0	0	0	0			0			0	0	0	0	☐	☐	
Transfer			1	2	4	1	0	101	10/17/2018	1	21	11/6/2018	0	$350.00	$150.00	0	☐	☐	
Transfer			2	4	6	3	0	16	11/1/2018	0			0	$350.00	$150.00	0	☐	☐	
			3	0	0	0	0			0			0	0	0	0	☐	☐	
	AB	DEF-109x	All	3	6	2	0	26	11/6/2018	2	16	11/6/2018	0	$1,250.00	$500.00	0	☐	☐	Lady's White 24 Karat Full Anniversary Wedding Ba
			HQ	0	0	0	0			0			0	0	0	0	☐	☐	
Transfer			1	0	0	2	0	26	11/6/2018	0			0	$1,250.00	$500.00	0	☐	☐	
			2	0	0	0	0		10/27/2018	2	16	11/6/2018	0	$1,250.00	$500.00	0	☐	☐	
			3	0	0	0	0			0			0	0	0	0	☐	☐	

Buttons and fields include:

Store Drop-Down	Multi-store only; filters styles by store. Only styles with levels set per store (not company) will display.
Edit Levels	Unlocks levels fields allowing you to set **Min** and **Max** quantities. For multi-store, use the accompanying **Set Individually**/**Store** button to toggle between setting levels by company (all stores combined) or per store.
Transfer	Multi-store only; use this button to select items to transfer to other stores. Note this button is only available on style lines where there is quantity in stock.
Vendor	The vendor of this particular style.
Style #	The vendor's style number.
Store	Multi-store only; displays break down by store for each style. The first row of each style will show **Totals** if managing per store or **All** if managing by company.
Min	User-defined minimum stock quantity for that style.
Max	User-defined maximum stock quantity for that style.
# In Stock	Quantity of this style currently in stock.
On Order	Quantity currently on a PO that has not been received or canceled.

Avg Days On Hand	The average of the number of days the in-stock items of this style have been in stock.
MR Recv	The date of the last time a piece matching this style was entered into inventory.
# Sold	Total number of this style sold.
Avg Days to Sale	The average of the number of days the sold items of this style remained in stock before being sold.
MR Sold	The date of the last time a piece matching this style was sold.
# SPO	Of **# Sold**, this quantity were sold on special orders.
Retail	The retail price for this style.
Cost	The cost for this style.
# Other	The number of this style in inventory under statuses other than In Stock and Sold including consumed, items on layaway, assembled, disassembled, built, etc.
Do Not Reorder	Mark this style to never be reordered.
Discontinued	Mark this style discontinued.
Description	The description of this style of item.

2. To see the underlying item records for a style, select the line and click **See Items** in the bottom left.
3. To change the minimum and maximum level fields, use the **Set Levels** button in the top right.
4. After setting levels, be sure to click the **Save Levels** button in the top right.
5. To indicate the item should not be reordered, select **Do Not Reorder**. The item will not appear in the **Rapid Reorder** form or report. Styles marked with this value will not show up on the **Rapid Reorder** form or **Rapid Reorder** report. However, they will still show up in the **Vendor Style** drop-down menus for item add and purchase orders.
6. To indicate that the style is no longer available from the vendor, select **Style is Discontinued**. The item will not appear in the **Rapid Reorder** form or report. Styles marked with this value will not show up on the **Rapid Reorder** form or **Rapid Reorder** report, nor will they show up in the **Vendor Style** drop-down menus for item add or purchase orders.

3.3.15.1 Managing a Style

To adjust the minimum and maximum stock levels of a particular vendor's style:

1. Perform an **Item Find**.
2. Select a particular style from the resulting list and select **Edit**. Alternatively, double-click on a style.
3. Use the **Supervisor** menu to **Unlock level fields**.
4. Enter desired quantities into the **Minimum level** and **Maximum level** fields. To set an item as "never out," set the minimum to at least 1.
5. Select a save option to retain these settings.

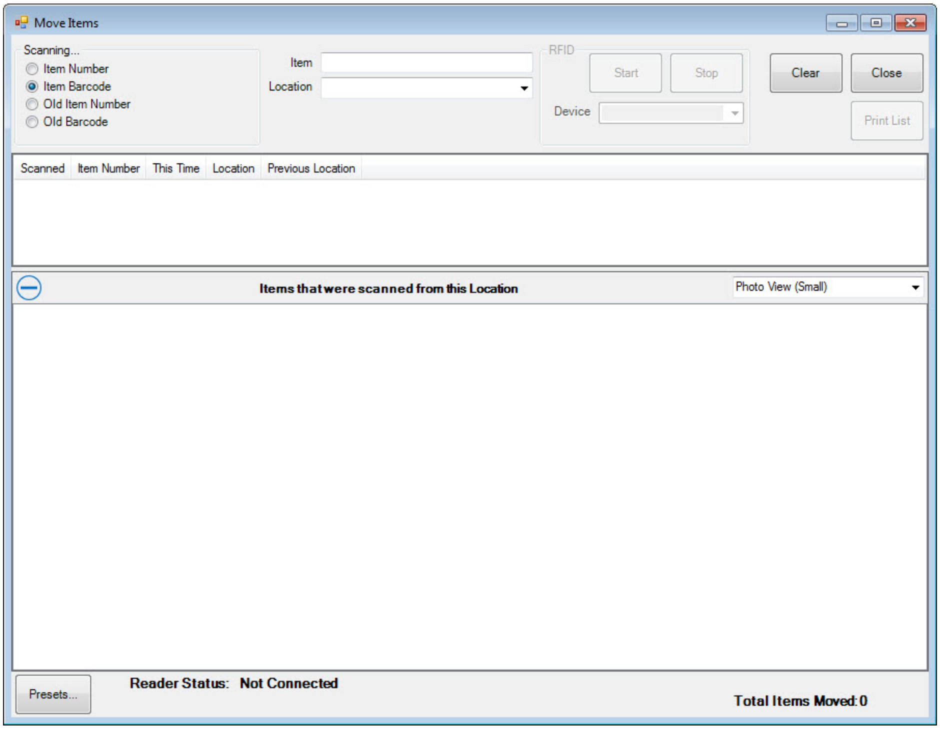
Additional options on this window include:

See Items	Returns a list of inventory matching this vendor and style.
See Cost	Located on the **Supervisor** menu, displays cost.

3.3.16 Move Item

The move item feature requires set up of locations. For more information, see the section entitled Locations. Once locations are established, The Edge can allow you to relocate inventory within the store from one location to another. To do so:

1. Select **Inventory ► Items► Move**. The **Move Items** window will appear.



Scanning...
○ Item Number
● Item Barcode
○ Old Item Number
○ Old Barcode

Photo View (Small)

Reader Status: Not Connected

Total Items Moved: 0

The **Move Items** window is divided into three sections:

- The top part is for setting inventory input type, entering item numbers, and managing other settings.
- The first window provides a list view of inventory as it is scanned or entered.
- The second window provides a picture view of items scanned and added to the results.

Specific fields and options in the **Move Items** window include:

Scanning	Indicates input methods:	
	Item Number	By input to the keyboard in the form of the item number that appears on the tag.
	Item Barcode	By barcode scan.
	Old Item Number	By keyboard entry; a stock number produced by another system.
	Old Barcode	By scan of a barcode from a previous system.
Item	The value scanned or to allow for manual entry.	
Location	Allows you to select a specific location within the store to which items should be moved. For more about working with locations, see the section entitled Locations.	
Clear	Clears the window. This does not clear the move activity, it just refreshes the window.	
Close	Items are saved as you scan. This closes the **Move Item** window.	
Print List	Prints a hard copy list of the inventory. You will be prompted to indicate which portion of the window to print.	

2. Select the method of scanning, i.e., the field to be captured with the barcode scan, to be used from the options described above.
3. From the **Location** drop-down menu, select the location of the item in the store, such as `CASE1` or `WALL1`. Depending on settings in **System Options**, this may be required.
4. If you have opted to manually enter item numbers by keyboard, you should type them into the **Item** field. If you are scanning items, note that the barcode will appear in the **Item** field.
5. Enter the item to be moved.
6. The item listing will appear in the middle portion of the **Move Items** window and an image, if available, will appear in the lower portion.
7. When moving is complete, select **Close**. The item record will reflect that location.

To recategorize items, use Supervisor ► Move to new category.

3.3.16.1 Best Practices

Consider adding Move Locations as a standard practice in your store when displaying your cases. For example, if you begin your day by deciding what will be displayed in the window case, make it procedure to record this movement of items when you make the move.

3.3.17 Photographing an Item

The Edge allows you to store a photograph of an item for verification purposes. This can be very helpful to confirm inventory records against transactions, but also for security when dealing with repairs and estimates. To include a photo of an item in the record:

1. From the **Add Item** window, select the camera icon (📷). A context menu will appear in which the image options. For details about the options in this menu, see the section entitled Adding and Managing Photos.
2. Select **Acquire** to activate the camera.
3. Turn the focus ring on the camera to obtain optimum picture (Watchport V/2 only).
4. Adjust shelf height if necessary to get optimum depth of picture.
5. Select **Save** from the **Acquire** window to take the picture. The image should now appear on the item window. This option may vary according to camera manufacturer.

3.3.18 Cloud Images

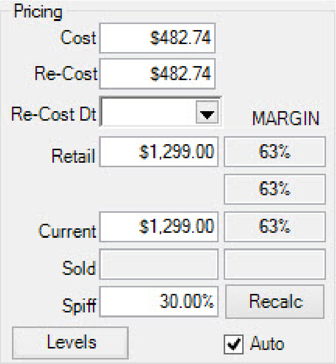
The Cloud Images feature allows you to link The Edge to a cloud storage drive. This facilitates the seamless use of smartphone cameras to acquire photos.

For information on setting up and using, see this website:
http://download.edgeuser.com/EdgeUpdates/CloudImages/CloudImages.html

3.3.19 Re-Costing Items

Re-costing frequently happens when you are adding inventory or editing inventory records. To do so:

1. Locate the item using **Item ► Find**.
2. From the desired item record, select **Supervisor**.
3. From the context menu:
    a. To see the cost, select **See Cost**.
    b. To see the re-cost, select **See Re-Cost**.
    c. To change the re-cost value, select **Change Pricing**, which allows you to edit the **Re-Cost** field.



Pricing

Cost $482.74

Re-Cost $482.74

Re-Cost Dt

MARGIN

Retail $1,299.00 63%

63%

Current $1,299.00 63%

Sold

Spiff 30.00%

☑ Auto

4. Change the value to the desired amount.
5. You will be prompted to record the re-cost date.
6. Select **OK/Save & Close**.

- **When new items are received, the cost that is entered is what is considered the current re-cost.**
- **To re-cost multiple items, use the Re-Cost feature in the Reprice function as described in the section entitled Reprice Items.**

To allow an associate to re-cost items, go to Administrative ► Associates ► Security.

3.3.20 Spot Metal Pricing

The **Spot Metal** pricing method allows you to sell inventory by metal type & weight. The Edge contains a **Metal Prices** function that allows you to set current metal prices. This must be manually updated, but can be done so quickly and will automatically apply the new metal price to all in stock inventory. There is also a system option that can be set to prompt the associate for the current metal price when they attempt to sell the item at POS.

3.3.20.1 Setup

Before you can begin using spot metal pricing there is initial setup you must complete. Please see the following sections:

3.3.20.1.1 System Options

There are two system options related to spot metal pricing located under **Inventory Options**.

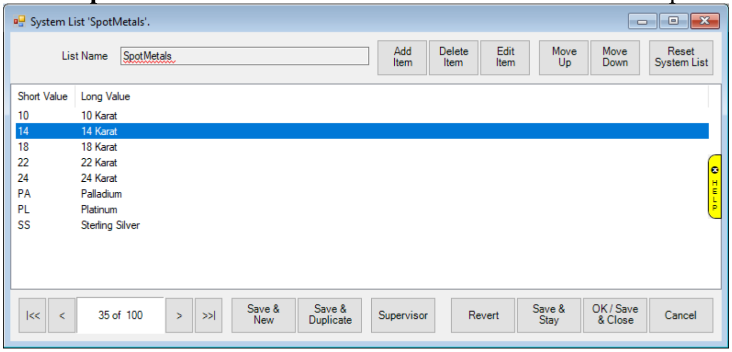
Prompt for Spot Metal Price when Selling	When a spot-priced metal is sold, this indicates whether you want The Edge to automatically prompt you for the current metal price at POS.
Prompt for Spot Metal Time Out	Only applicable if Prompt for Spot Metal Price When Selling set to True, this defines a timeout period in minutes. If the spot price has not been updated in this timeframe it will prompt. Set to 0 to prompt every time an item sold.
Spot Metal Pricing Website	The website used to obtain metal pricing. This does not automatically update anything in the software; instead, this website will appear as a link in the metal pricing window.

3.3.20.1.2 Metal Types

The Edge will load with a list of default metal types. To add, view, or edit additional metals:

1. Click **Administrative ► Lists**. This will display the **List of Lists** window.

2. Check **Show System Lists** at the bottom.
3. Select **SpotMetals** from the list and **Edit** it. A list of current spot metals will appear.



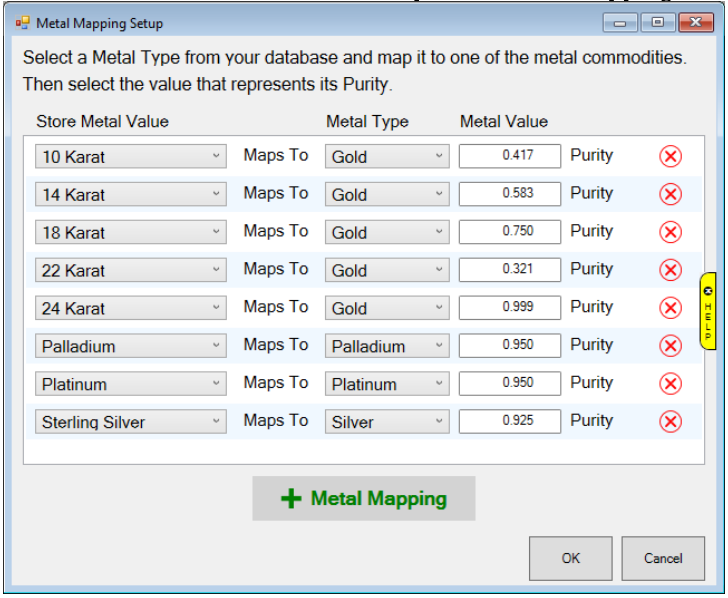
List Name SpotMetals

Short Value	Long Value
10	10 Karat
14	14 Karat
18	18 Karat
22	22 Karat
24	24 Karat
PA	Palladium
PL	Platinum
SS	Sterling Silver

4. From here, you can use **Delete Item** to delete an unwanted metal, **Edit Item** to edit an existing one, or **Add Item** to create a new one. When adding, you will need to specify both a short value (abbreviation) and long value (spelled out).

Each metal needs to be mapped to a Metal Type and assigned a Metal Value. For example, 10k karat gold has a purity of approximately 41 percent gold. The Edge will load default values for you. To add or change mapping:

1. Click **Administrative ► Metals Setup.** The **Metal Mapping Setup** window will appear.



Select a Metal Type from your database and map it to one of the metal commodities. Then select the value that represents its Purity.

Store Metal Value		Metal Type	Metal Value	
10 Karat	Maps To	Gold	0.417	Purity
14 Karat	Maps To	Gold	0.583	Purity
18 Karat	Maps To	Gold	0.750	Purity
22 Karat	Maps To	Gold	0.321	Purity
24 Karat	Maps To	Gold	0.999	Purity
Palladium	Maps To	Palladium	0.950	Purity
Platinum	Maps To	Platinum	0.950	Purity
Sterling Silver	Maps To	Silver	0.925	Purity

Store Metal Value	The name of the metal in your store as defined in the SpotMetals list.
Metal Type	The type of metal to map to; these are hardcoded and cannot be changed. Options include Gold, Silver, Platinum, and Palladium.

Metal Value	The purity value of the metal.

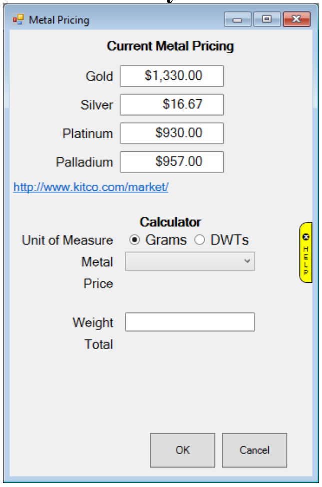
2. Each Store Metal must be mapped to a Metal Type and assigned a purity. You can edit existing mappings, add new with the **+ Metal Mapping** button, or remove mappings with the **Red X** button.

3.3.20.2 Metal Prices

After spot metals have been setup and mapped to metal types, you can use the Metal Prices feature to enter spot prices based on current market values. This must be done manually, but can be done quickly and will update all relevant item pricing instantly. There is also a system option that can be enabled to prompt the associate to check and update metal pricing right from POS if a spot metal priced item is being sold.

To set metal prices:

1. Click **Inventory ► Metal Prices.** The Metal Pricing window will appear.



Gold $1,330.00
Silver $16.67
Platinum $930.00
Palladium $957.00
http://www.kitco.com/market/
Unit of Measure ● Grams ○ DWTs
Metal
Price
Weight
Total

2. Each metal will be listed with the last entered price. To update a price, simply enter it next to the type of metal and click **OK**.

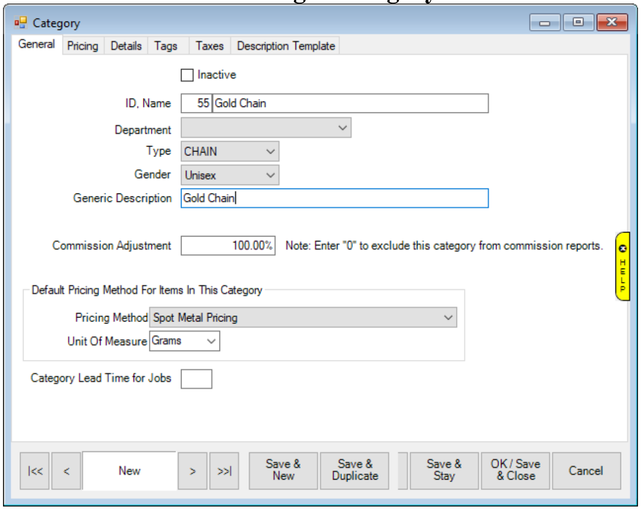
The calculator provided here allows you to calculate prices for reference purposes only. This information is not stored anywhere.

3.3.20.3 Creating a Spot Metal Pricing Category

Unlike other pricing methods, spot metal priced items require their own category. This category can only contain items of this pricing method, and likewise, categories set to any other pricing method will not allow the entry of spot metal priced items.

To create a category for spot metal pricing:

1. Click **Inventory ► Categories ► Add.**
2. On the **General** tab, use the **Pricing Method** drop-down to select **Spot Metal Pricing** and use the **Unit of Measure** drop-down to select DWTs or Grams. Fill out other fields on this tab as described in section **Adding a Category**.



☐ Inactive

ID, Name: 55 Gold Chain

Department:

Type: CHAIN

Gender: Unisex

Generic Description: Gold Chain

Commission Adjustment: 100.00% Note: Enter "0" to exclude this category from commission reports.

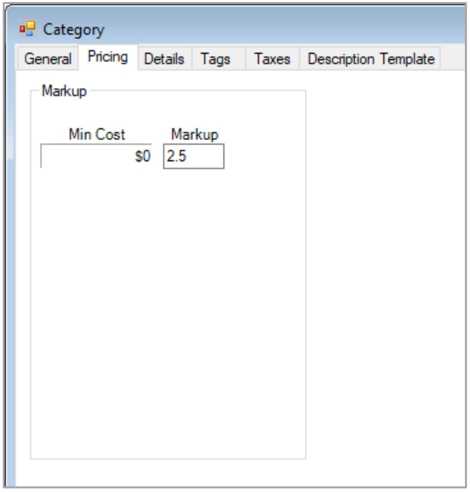
Default Pricing Method For Items In This Category

Pricing Method: Spot Metal Pricing

Unit Of Measure: Grams

Category Lead Time for Jobs:

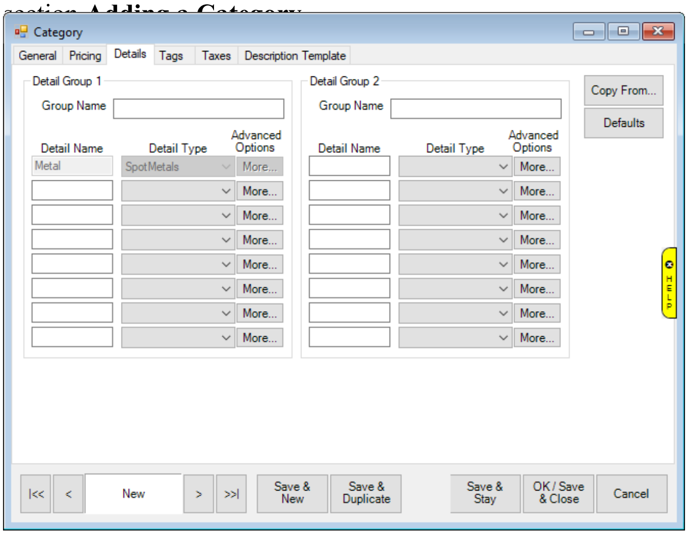
3. Click on the **Pricing** tab and enter a markup. Unlike other categories, you can only specify a single markup. This is multiplied by the metal cost to calculate retail price.



Markup

Min Cost	Markup
$0	2.5

4. Click on the **Details** tab. The first detail will default to Metal and will be linked to your list of spot metals. This detail is hardcoded and cannot be changed. Add other details as described in section **Adding a Category**.



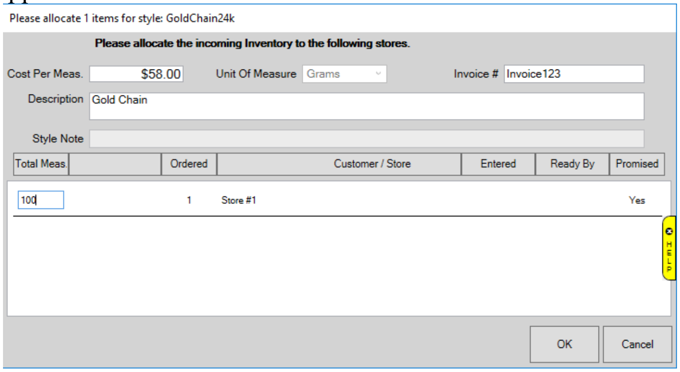
5. Complete other tabs as desired, then save the category.

3.3.20.4 Adding a Spot Metal Pricing Item

Before you can add items of this pricing method you must first create a category for them. Spot metal priced items can only be entered into categories setup specifically for this pricing method. See Creating a Spot Metal Pricing Category for information on how to setup a category.

To add a spot metal priced item:

1. Click **Inventory ► Item ►Add ► Item.** The **New Item** window will appear.
2. Select a category that you have setup with the spot metal pricing method.
3. Specify a vendor and vendor style. After you enter a vendor style # the **Allocation** window will appear.


Please allocate 1 items for style: GoldChain24k

Please allocate the incoming Inventory to the following stores.

Cost Per Meas. $58.00

Unit Of Measure Grams

Invoice # Invoice123

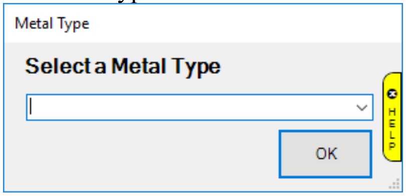
Description Gold Chain

Style Note

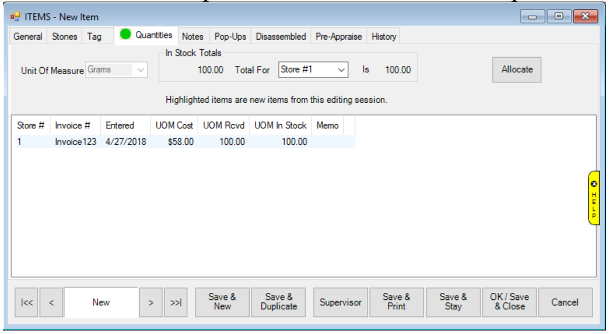
Total Meas		Ordered	Customer / Store	Entered	Ready By	Promised
100		1	Store #1			Yes

4. Specify **Cost Per Measure**, **Invoice #**, **Description**, and **Total Measure** being received, then click **OK**.

5. This will bring you to the quantities tab of the item and a window will appear allowing you to select the type of metal for this item.



6. This metal type appears on, and can also be changed from, the **General** tab. Choose the correct metal from the drop-down and click **OK**. The quantities tab now displays your entry.



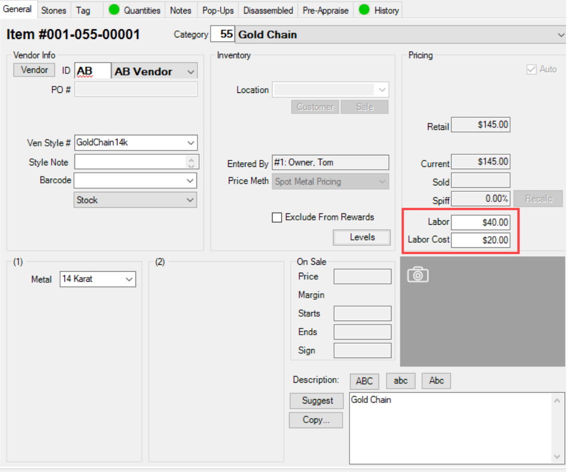
Unit Of Measure Grams

In Stock Totals: 100.00 Total For Store #1 Is 100.00

Highlighted items are new items from this editing session.

Store #	Invoice #	Entered	UOM Cost	UOM Rcvd	UOM In Stock	Memo
1	Invoice123	4/27/2018	$58.00	100.00	100.00	

7. Click on the **General** tab. There are two fields here unique to spot metal pricing: **Labor** and **Labor Cost**. **Labor** is for the retail price of labor; this gets added to the price when this item is sold. **Labor Cost** is the cost for this.



Item #001-055-00001

Category 55 Gold Chain

ID AB AB Vendor

PO #

Ven Style # GoldChain14k

Style Note

Barcode

Stock

Location

Entered By #1: Owner, Tom

Price Meth Spot Metal Pricing

☐ Exclude From Rewards

Retail $145.00

Current $145.00

Sold

Spiff 0.00%

Labor $40.00

Labor Cost $20.00

Metal 14 Karat

Price

Margin

Starts

Ends

Sign

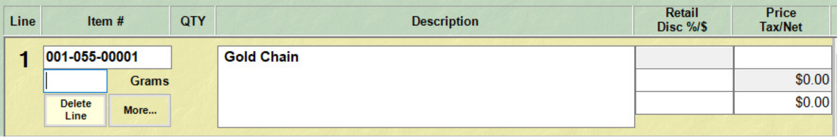
Gold Chain

8. Complete remaining tabs as described in the section **Adding an Item (Standard)** and save your new item.

3.3.20.5 Selling a Spot Metal Pricing Item

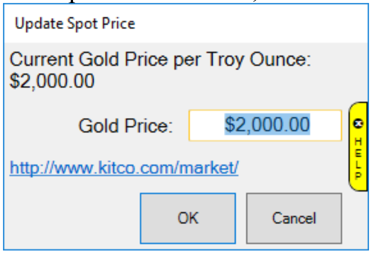
To sell a spot-priced item:

1. Go to **POS**. Specify the associate and customer.
2. Click **Sell Item** and enter the item's number. Alternatively, you can scan its barcode.



Line	Item #	QTY	Description	Retail Disc %/$	Price Tax/Net
1	001-055-00001	Grams	Gold Chain		$0.00 $0.00

3. Enter the quantity being sold.
4. If you have the system option enabled a window will appear asking you to input the current metal price. Otherwise, it will calculate retail based on the last entered price for the metal.



Update Spot Price

Current Gold Price per Troy Ounce: $2,000.00

Gold Price: $2,000.00

http://www.kitco.com/market/

5. The retail price will be calculated. If you entered an amount in the **Labor** field on this item record then this will be added to the retail price.
6. Proceed with the rest of the sale as you normally would.

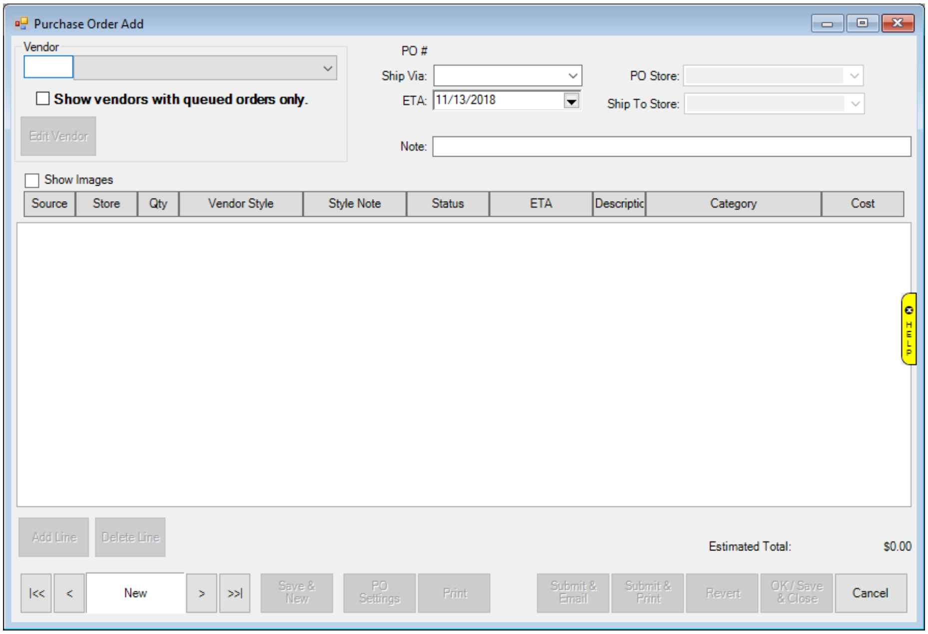
3.4 Purchase Orders

The **Purchase Order** feature is part of a larger inventory management system offered by The Edge that consists of a number of features that work together: item records, **Inventory Buying Tools**, the **Levels** feature, the **Rapid Reorder** feature, special orders, purchase orders, and item intake. This section covers purchase orders and describes how to order items queued from special orders, item records, or the Rapid Reorder feature (see the section entitled Ordering Reports) and receive them into inventory.

3.4.1 Adding a Purchase Order

To create a new purchase order:

1. Select **Inventory ► PO ► Add**. The **Purchase Order Add** window will appear.



ETA: 11/13/2018

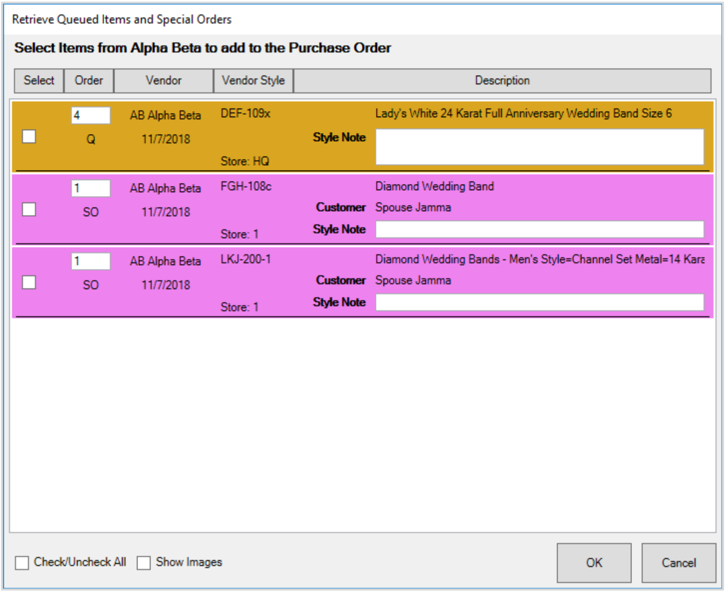
Estimated Total: $0.00

Fields and options in the **Purchase Order Add** window include:

Vendor	The vendor to whom this purchase order will be submitted.
Show vendors with queued orders only	Enabled by default, populates the **Vendor** drop-down list with vendors who have open purchase orders.
Edit Vendor	Returns the vendor record so you can review details or make changes. The changes will be reflected immediately.
Show Images	Enables the image column on the window. It does not affect images on the purchase order when printed or emailed.

PO #	The Edge-generated purchase order number; it will be created when the purchase order is saved.
Ship Via	The shipping method or carrier. Shipping methods can be managed from **Administrative ▶ Lists**. The list name is Shipping Methods.
ETA	The estimated date of arrival based on typical vendor delivery time. It cannot be earlier than the current date and cannot be changed after the purchase order is submitted.
Date Ordered	Shows the date the order was submitted. This will not appear until the purchase order has been submitted.
Note	Allows you to enter notes about the order.
PO Store	Multi-store only; assign this PO to a store. Leaving this blank will mark this PO as 'Unassigned.' It is not necessary to assign a PO to a store.
Ship To Store	Multi-store only; which store to ship the items to. This can differ from the **PO Store**.
Add Line	Allows you to add a line item to the purchase order. It is disabled after the purchase order is submitted.
Delete Line	Allows you to delete a line item from the purchase order. If the item came from the queued item list, it will be returned there.

2. Select the vendor for this order. The **Retrieve Queued Items and Special Orders** window will appear. Note that if you choose a vendor for whom a purchase order exists, you will be prompted to open that purchase order and add items to it.



Retrieve Queued Items and Special Orders

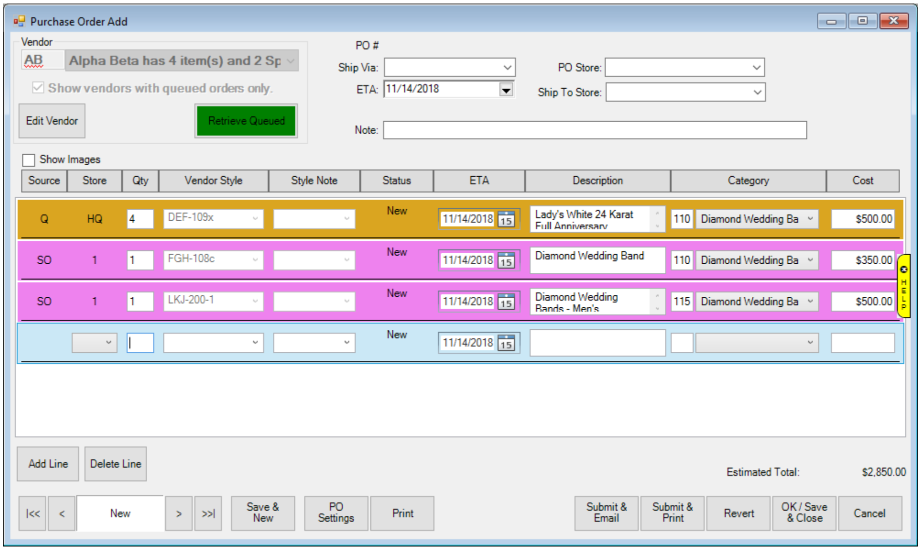
Select Items from Alpha Beta to add to the Purchase Order

Select	Order	Vendor	Vendor Style	Description
☐	4 Q	AB Alpha Beta 11/7/2018	DEF-109x Store: HQ	Lady's White 24 Karat Full Anniversary Wedding Band Size 6 **Style Note**
☐	1 SO	AB Alpha Beta 11/7/2018	FGH-108c Store: 1	Diamond Wedding Band **Customer** Spouse Jamma **Style Note**
☐	1 SO	AB Alpha Beta 11/7/2018	LKJ-200-1 Store: 1	Diamond Wedding Bands - Men's Style=Channel Set Metal=14 Kara **Customer** Spouse Jamma **Style Note**

For the purposes of the **Retrieve Queued** window and the **Purchase Order** window, line items will be color-coded as follows:

Yellow	Queued items
Purple	Special order items
Dark Red	Marked to be cancelled
Red	Cancelled
Light Yellow	Other
Blue	Selected
Light blue	Hovering

3. Select the items to be added to the purchase order. From here you can only change quantity and cost.
4. Select **OK**. The **Purchase Order Add** window will be populated with the items.



Vendor: AB Alpha Beta has 4 item(s) and 2 Sp

☑ Show vendors with queued orders only.

PO #

Ship Via:

ETA: 11/14/2018

PO Store:

Ship To Store:

Note:

☐ Show Images

Source	Store	Qty	Vendor Style	Style Note	Status	ETA	Description	Category	Cost
Q	HQ	4	DEF-109x		New	11/14/2018	Lady's White 24 Karat Full Anniversary	110 Diamond Wedding Ba	$500.00
SO	1	1	FGH-108c		New	11/14/2018	Diamond Wedding Band	110 Diamond Wedding Ba	$350.00
SO	1	1	LKJ-200-1		New	11/14/2018	Diamond Wedding Bands - Men's	115 Diamond Wedding Ba	$500.00
					New	11/14/2018			

Estimated Total: $2,850.00

5. If needed, use **Retrieve Queued** to go back to the **Retrieve Queued** window and select more items.
6. Select a shipping method from the **Ship via** drop-down menu.
7. Enter notes in the **Notes** field to place a note on the order (optional).
8. Enter an estimated time of arrival in the **ETA** field. This can be set for the entire purchase order or for each item line.
9. To add more items, select **Add Line**. If this order is for a style that has been in stock before, select the vendor style from the drop-down menu. If this order is for a new style, type in its vendor style

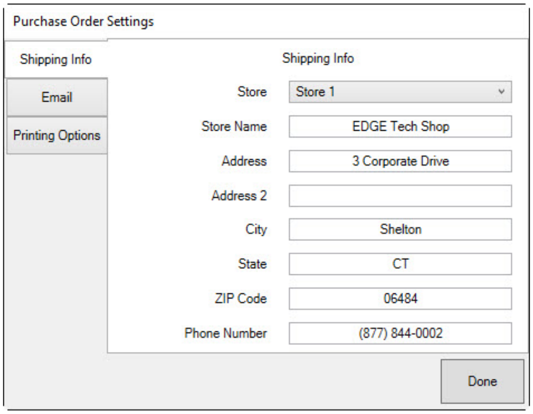
number and basic details. As a shortcut, you can scan item tags and special order envelopes to quickly create line items.

10. Multi-store only; each PO line has a **Store** drop-down allowing you to select a style for this line. It is possible to have different store numbers on each line if desired. When received, the inventory will allocate to the appropriate store.
11. Verify and correct data in each item line:
    a. Image
    b. Source
    c. Quantity (must be greater than 0)
    d. Style Code (required). You may be prompted to copy details from a previous item.
    e. Status
    f. ETA (must be later than the current date)
    g. Description (required)
    h. Category (required)
    i. Cost per item (required).
12. Choose a save option:
    a. **Print Preview**: Allows you to print a purchase order. This does <u>not</u> submit the purchase order. To do so, use **Submit & Print**.
    b. **Submit & Email**: Saves the purchase order in The Edge as ordered and sends the purchase order by email to the vendor.
    c. **Submit & Print**: Saves the purchase order in The Edge as ordered and sends the purchase order to the printer so you can fax or mail it to the vendor.
    d. **OK/Save & Close**: Saves the purchase order to be worked on later. This does not submit the purchase order to the vendor or record it as such in The Edge.

3.4.2 Purchase Order Settings

Found in both new and existing purchase order records, the **Purchase Order Settings** option allows you to choose information that should appear when printing a purchase order. To work with purchase order settings:

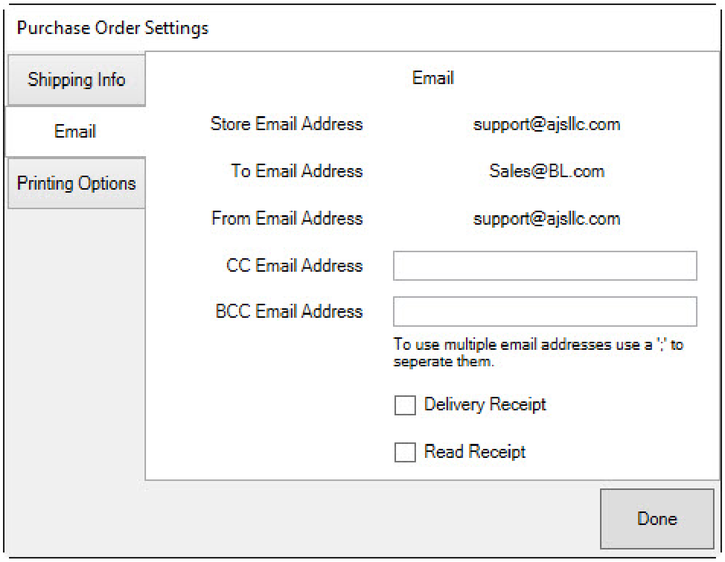
1. From the purchase order record, select **PO Settings**. The **Purchase Order Settings** window will appear with the **Shipping Info** tab open.



Store: Store 1
Store Name: EDGE Tech Shop
Address: 3 Corporate Drive
Address 2:
City: Shelton
State: CT
ZIP Code: 06484
Phone Number: (877) 844-0002

The **Shipping Info** tab allows you to change the store to which the order should be sent. Fields are self-explanatory and are populated from your Edge license file.

2. Make changes as needed and select the **Email** tab.



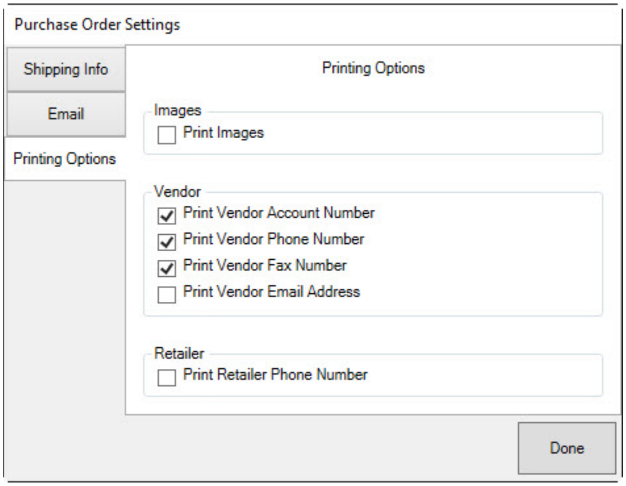
Store Email Address: support@ajsllc.com
To Email Address: Sales@BL.com
From Email Address: support@ajsllc.com
CC Email Address:
BCC Email Address:
To use multiple email addresses use a ';' to seperate them.
☐ Delivery Receipt
☐ Read Receipt

Fields in the **Email** tab are treated as follows:

Store Email Address	Obtained from your Edge license file. This cannot be changed.
To Email Address	Obtained from the purchase order vendor email field. If it is not on the purchase order, it will be pulled from the vendor record. This is needed to submit by email.

From Email Address	This is the store email address unless otherwise specified in the System Option **Purchase Order Email Address**.
CC Email Address	Allows you to add a carbon copy email to a third party. To use more than one, separate them with a semi-colon (;). Default addresses can be set in **System Options**.
BCC Email Address	Loaded from the System Option **Purchase Order BCC Email Address**. To use more than one, separate them with a semi-colon (;). It can be changed here. Default addresses can be set in **System Options**.
Delivery Receipt	If the recipient's email system supports it, this will generate a receipt of delivery. This is saved to the Most Recent Settings.
Read Receipt	If the recipient's email system supports it, this will generate a read receipt. This is saved to the Most Recent Settings.

3. Make changes as needed in the **Email** tab and select the **Printing Options** tab.



Images
☐ Print Images

Vendor
☑ Print Vendor Account Number
☑ Print Vendor Phone Number
☑ Print Vendor Fax Number
☐ Print Vendor Email Address

Retailer
☐ Print Retailer Phone Number

The **Printing Options** tab allows you to decide what should appear on the actual purchase order in either email or print format. These options are saved for future use. Items you can include are:

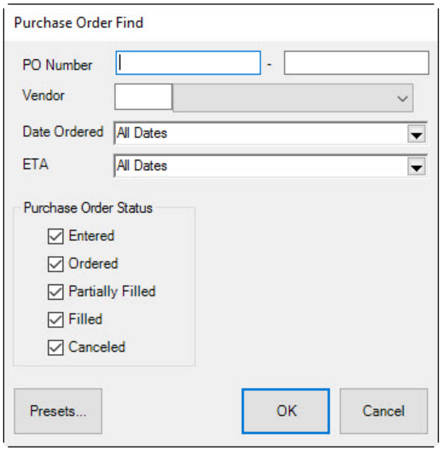
- **Print Images**
- **Print Vendor Account Number**
- **Print Vendor Phone Number**
- **Print Vendor Fax Number**
- **Print Vendor Email address**
- **Print Retailer Phone Number**.

4. Complete these options and select **Done**.

3.4.3 Finding and Editing a Purchase Order

To avoid confusion with your vendors, care should be taken in editing a submitted purchase order. We do not recommend resubmitting purchase orders except to ensure The Edge is not expecting an item to be entered into inventory. To find, view, or edit an existing purchase order:

1. Select **Inventory ► P/O ► Find Orders**. The **Purchase Order Find** window will appear.



Purchase Order Find

PO Number -

Vendor

Date Ordered: All Dates

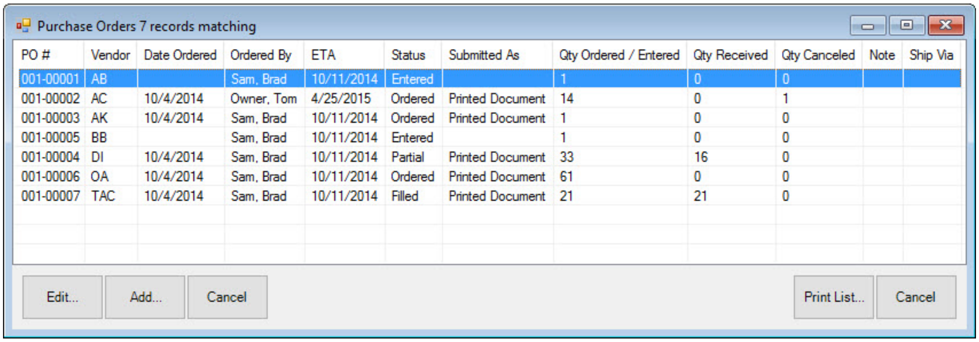
ETA: All Dates

Purchase Order Status
- ☑ Entered
- ☑ Ordered
- ☑ Partially Filled
- ☑ Filled
- ☑ Canceled

Fields and option in the **Purchase Order Find** window include:

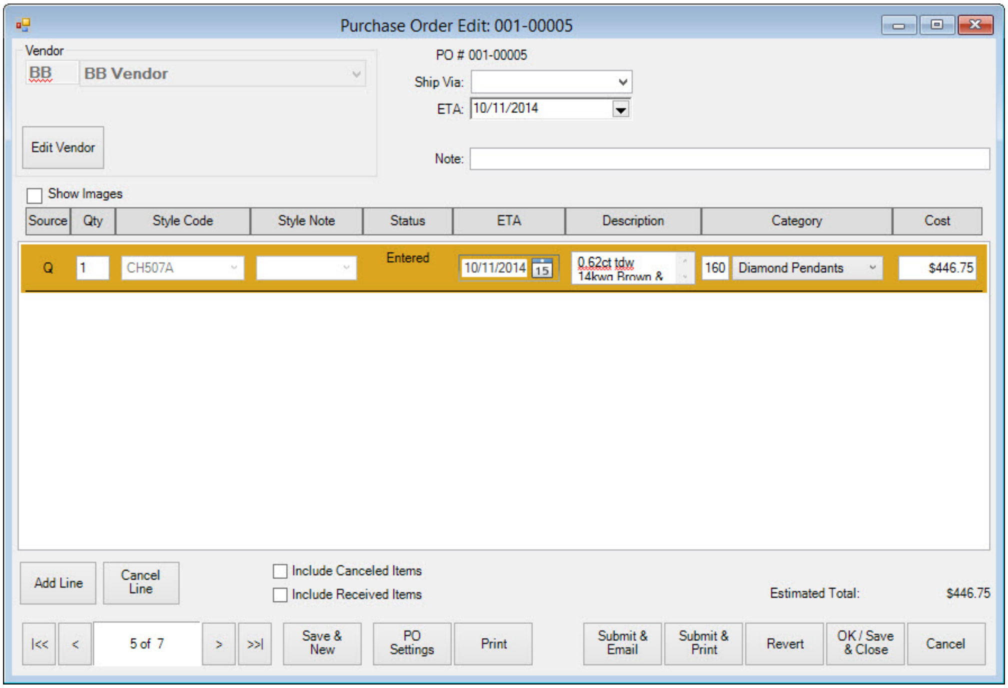
PO Number	Returns POs numbered in this range.
Vendor	Returns POs for the specified vendor.
Date Ordered	Returns POs with a submission date in the specified date range.
ETA	Returns POs with the specified ETA date range.
Purchase Order Status	Returns POs with statuses as selected below.
Entered	P/O created but not ordered.
Ordered	P/O ordered but none of ordered quantity received.
Partially Filled	P/O ordered and some ordered quantity received.
Filled	P/O ordered and all ordered quantity received.
Deleted	P/O deleted before order was placed.
Cancelled	Order on the P/O was placed, but then cancelled.

2. Enter criteria to find a specific purchase order and select **OK**. The **Purchase Order** list will appear.


Purchase Orders 7 records matching

PO #	Vendor	Date Ordered	Ordered By	ETA	Status	Submitted As	Qty Ordered / Entered	Qty Received	Qty Canceled	Note	Ship Via
001-00001	AB		Sam, Brad	10/11/2014	Entered		1	0	0		
001-00002	AC	10/4/2014	Owner, Tom	4/25/2015	Ordered	Printed Document	14	0	1		
001-00003	AK	10/4/2014	Sam, Brad	10/11/2014	Ordered	Printed Document	1	0	0		
001-00005	BB		Sam, Brad	10/11/2014	Entered		1	0	0		
001-00004	DI	10/4/2014	Sam, Brad	10/11/2014	Partial	Printed Document	33	16	0		
001-00006	OA	10/4/2014	Sam, Brad	10/11/2014	Ordered	Printed Document	61	0	0		
001-00007	TAC	10/4/2014	Sam, Brad	10/11/2014	Filled	Printed Document	21	21	0		

3. Select the purchase order and select **Edit**. The **Purchase Order Edit** window will appear.


Purchase Order Edit: 001-00005

Vendor: BB BB Vendor

PO # 001-00005

Ship Via:

ETA: 10/11/2014

Note:

☐ Show Images

Source	Qty	Style Code	Style Note	Status	ETA	Description		Category	Cost
Q	1	CH507A		Entered	10/11/2014	0.62ct tdw 14kwg Brown &	160	Diamond Pendants	$446.75

☐ Include Canceled Items

☐ Include Received Items

Estimated Total: $446.75

5 of 7

Fields and options in the **Purchase Order Edit** window include:

Vendor	Allows you to select a vendor.
Edit Vendor	Returns the vendor record so you can view details or make changes. These changes will be applied to the purchase order.
PO Submitted As	If submitted, the method by which the purchase order was submitted.
PO #	The Edge-assigned purchase order number.

Ship Via	The shipping method or carrier.
ETA	The estimated time of the order's arrival.
Date Ordered	If submitted, the date the order was submitted.
Note	For notes about the purchase order in general.
Show Images	Allows you to see item images. This is only on the window; it doesn't not affect the actual purchase order when printed or emailed.
Add Line	If not submitted, you can add items to the order.
Cancel Line	Cancels the item from the purchase order and marks the line item cancelled. This option has some contingencies: • If a selected line has not been saved, it will delete the selected line from the purchase order. If the line came from the **Retrieve Queued** window, it will return it to the queue for fulfillment later. • If a selected line has been saved, **Cancel Line** will cancel the selected line on the order. It will only appear if you have **Show Cancelled** checked. The line will turn dark red and will be cancelled when the purchase order is saved. • If a selected line represents ordered items that are partially received, the button will cancel the portion of the order that has not been received. • You cannot cancel fulfilled lines that have been fully received.
Include Cancelled Items	Allows you to show items that have been cancelled from this purchase order. This option is only visible if there are line items on the purchase order.
Include Received Items	Allows you to show items that have already been received and added.
Estimated Total	Contains a total of the cost of all items in the purchase order. It is the quantity times the cost.
PO Settings	Opens the **Purchase Order** settings window described in the section entitled Purchase Order Settings.
Submit Email	Allows you to submit this purchase order by email. Appears only if the order has not been submitted previously.
Re-Submit Email	Allows you to re-submit this purchase order by email. Appears only if the order has been submitted previously.
Submit & Print	Allows you to submit this purchase order by mail. Appears only if the order has not been submitted previously.
Re-Submit & Print	Allows you to re-submit this purchase order by mail. Appears only if the order has been submitted previously.

4. As long as the purchase order has not been submitted, you can make changes to fields, except style code. You can change quantity, category and cost. After it is ordered, everything but cost is fixed.

3.4.4 Receiving Ordered Styles

Styles that are placed on purchase orders and marked ordered will be automatically available to be received using the **Receive Invoice** feature. Those who manage purchase orders regularly may find it more convenient to work from this area. For more information, see the section entitled Add Item from Invoice.

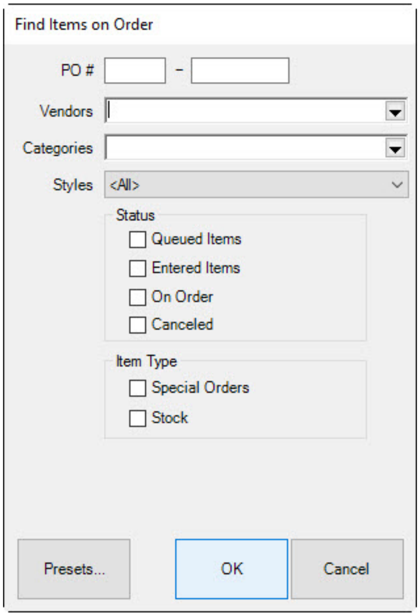
Ordered styles that are subsequently added to inventory will automatically fulfill outstanding purchase orders on a FIFO basis (first-in, first-out). If a style order appears on multiple purchase orders and is then received to inventory, the oldest purchase order for that style will get fulfilled. If you do not use purchase orders, it might be best to use add an item, even special orders, directly as described in the section entitled Adding an Item (Standard).

There is no way to manually specify the purchase order number on a received item. The Edge automatically fulfills and links received ordered items against outstanding purchase orders.

3.4.5 Finding Orders

The **Finding Orders** function allows you to find orders by item rather than by invoice or purchase order. To find an order:

1. Go to **Inventory** ► **P/O** ► **Ordered Items**. The **Find Items on Order** window will appear.



Fields and options in the **Find Items on Order** window include:

PO #	Returns orders contained on purchase orders numbered in the specified range.
Vendors	Returns orders with the specified vendors.
Categories	Returns orders in the specified categories.
Styles	Returned orders with the specified styles.
Status	
Queued Items	Returns orders that have the status of Queued.
Entered Items	Returns orders that have the status of Entered.
On Order	Returns orders that have the status of On Order.
Canceled	Returns orders that have the status of Cancelled.
Item Type	
Special Orders	Returned orders that are a result of a special order.
Stock	Returned orders contain stock items.

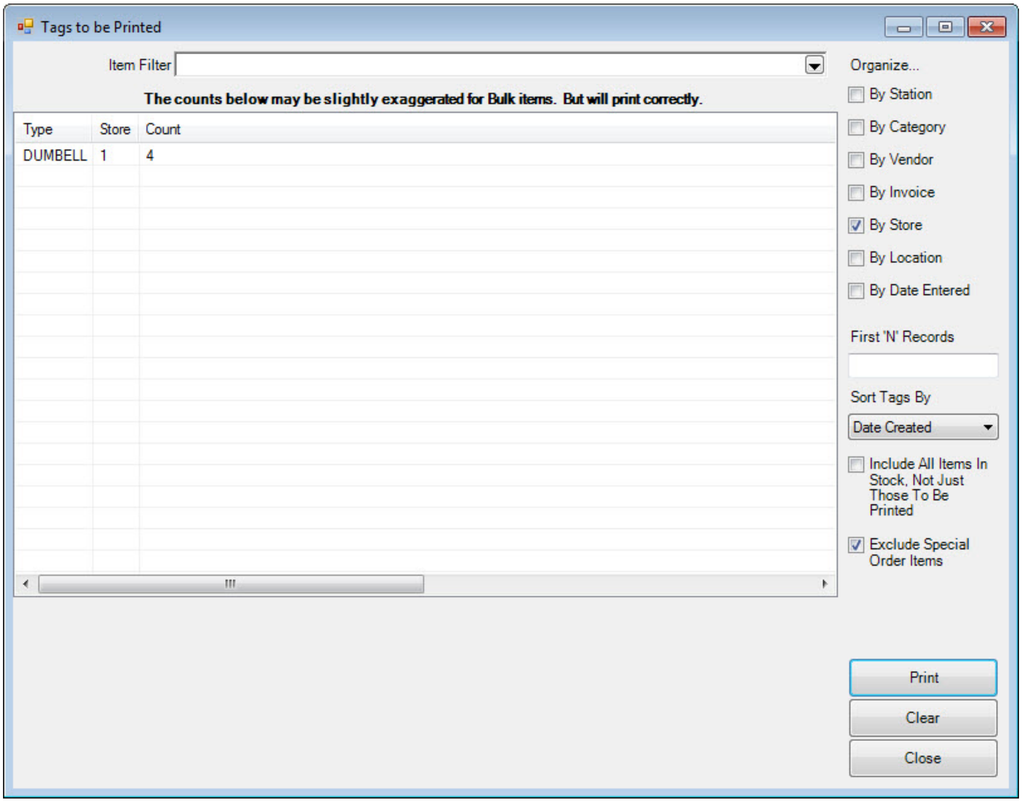
2. Complete the search parameters and select **OK**. The results will appear in the **Items on Order** window.
3. To work with an item record, select the item and select **Edit**.
4. To cancel the item from an order, select the item and select **Cancel Item**.

3.5 Printing Item Tags

Every item entered into inventory will have a tag created for it in the tag file. It is recommended that entered items be printed in manageable quantities of 30 to 50 items. Also, when an item is returned, a new tag will be created here. Alternatively, tags can be printed from the **Add Item** or **Edit Item** window on an individual basis. The information on the tags will be controlled by choices made when setting up the category record. See the section entitled Adding a Category for more information regarding setting up the tag layout on a category.

To print a batch of tags:

1. Select **Print Tags** from the **Inventory** menu. The **Tags to be Printed** window will appear.



Tags to be Printed

Item Filter

The counts below may be slightly exaggerated for Bulk items. But will print correctly.

Type	Store	Count
DUMBELL	1	4

Organize...

☐ By Station
☐ By Category
☐ By Vendor
☐ By Invoice
☑ By Store
☐ By Location
☐ By Date Entered

First 'N' Records

Sort Tags By: Date Created

☐ Include All Items In Stock, Not Just Those To Be Printed

☑ Exclude Special Order Items

This window contains the status of the queue of tags to be printed. Before you begin, make sure your printer is loaded with a sufficient number of the correct format tags.

2. Select the method(s) you would like to use to determine tag organization:

By Station	Separates the tags based upon the computer used for inventory entry. This is useful when multiple associates are entering inventory from multiple locations.
By Category	Separates the tags by category. This is useful if you were repricing existing inventory by category.
By Vendor	Separate the tags by vendor. This is useful when used in conjunction with the **By Invoice** option.
By Invoice	Separates the tags by invoice.
By Store	Separates the tags by store. This is useful in a multi-store environment.
By Location	Separates the tags by case location.
By Date Entered	Separates the tags based upon the date the items were entered into inventory.

3. Highlight the row of tags you wish to print.
4. Optionally, enter the number of records you would like to print at one time in the **First N Records** field.
5. To specify the order in which tags are printed, select **Sort tags by** drop-down list. This offers `Date Status Changed`, `Item Number`, `Old Item Number`, `Date Entered`, or `Date Created`.

By selecting Include ALL items in stock, not just those to be printed and/or Exclude Special Order Items, you can print all tags within the system sorted per your specifications.

6. Select **Print**. Alternatively, double-clicking on a row of tags will also cause them to start printing.
7. At the conclusion of printing a row of tags, a window will be displayed showing all the tags that should have printed. This is used to clear the tags from the queue. If you need to reprint a tag, clear its checkbox before selecting **OK**.
8. To clear tags that you do not wish to print, highlight the row and select **Clear**. Place a check next to the tags you wish to delete before selecting **OK**.

Clear can also be used to preview tags that are waiting in queue. To do so, select a row, select Clear, and then, rather than selecting tags for deletion, cancel out.

3.6 Printing Signage

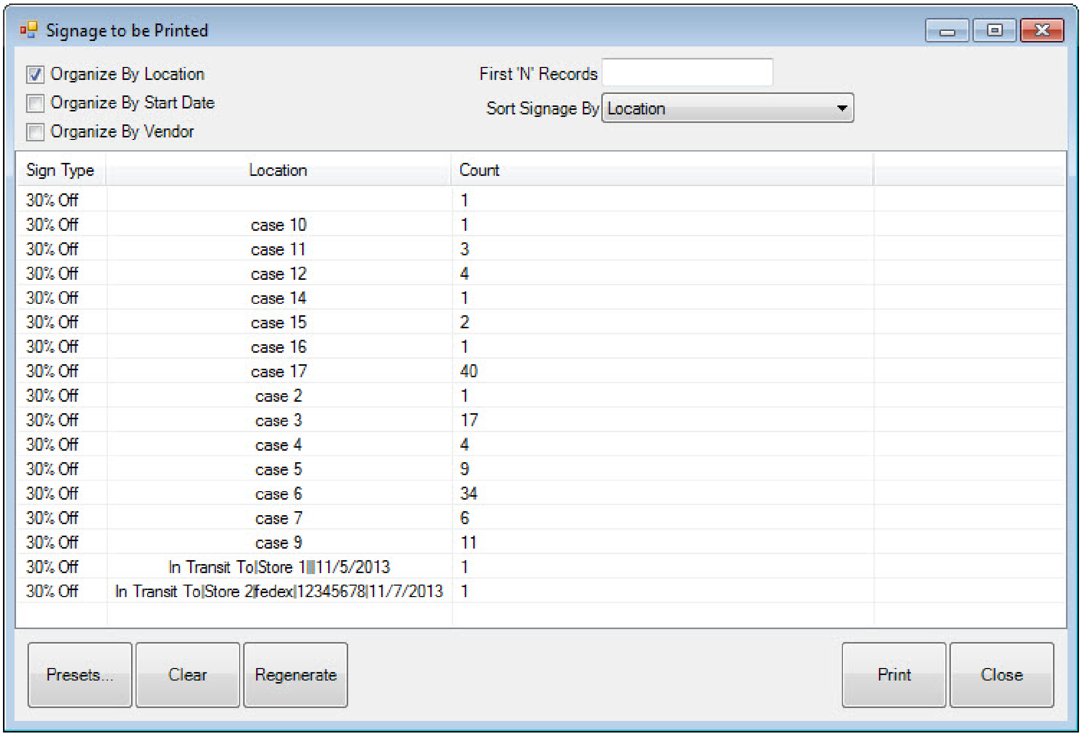
In addition to printing tags, The Edge offers the feature of generating and printing signage. These are signs designed to be on display along with items as opposed to poster-size signs. Such signs are generated from selections made in the Start a Sale function (see the section entitled Start a Sale) or **Automatic Markdown** in the **Categories** function (see the section entitled Categories). We recommend pre-perforated and colored paper stock on which to print such signs.

Sign templates can be assigned in a few ways:

- Use **Administrative ► Start a Sale** function to put items on sale. If you choose a sign when creating the sale, signs will be generated for all items involved in the sale.
- Setup automatic markdown tables for use with **Inventory Buying Tools**. Each markdown tier can be assigned a sign (if appropriate) and these signs will be automatically generated when AIMS Autopilot is run.

To generate signs:

1. Select **Print Signage** from the **Inventory** menu. The **Signage to be Printed** window will appear.



☑ Organize By Location
☐ Organize By Start Date
☐ Organize By Vendor

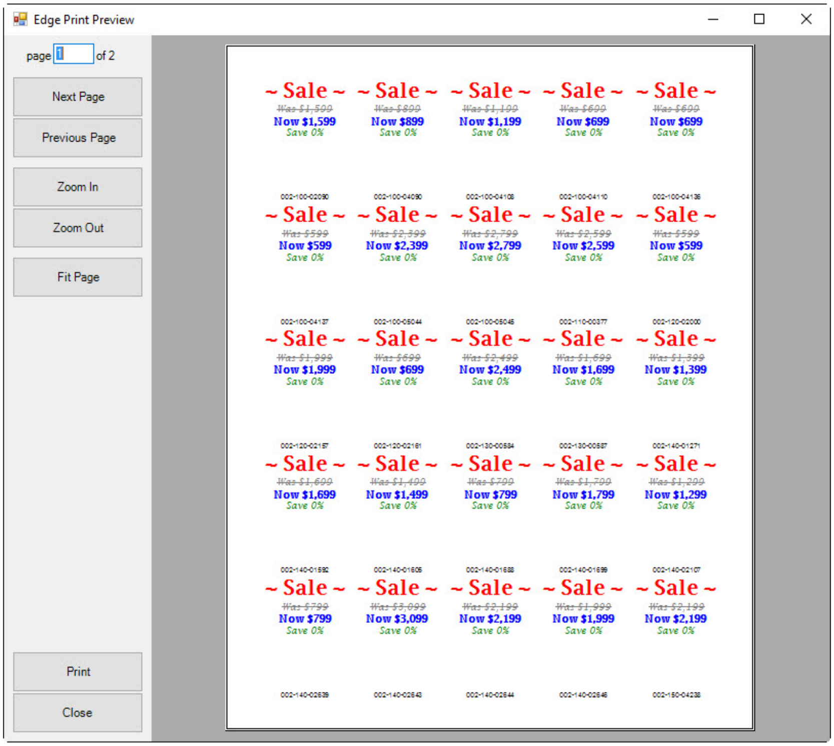
First 'N' Records
Sort Signage By Location

Sign Type	Location	Count
30% Off		1
30% Off	case 10	1
30% Off	case 11	3
30% Off	case 12	4
30% Off	case 14	1
30% Off	case 15	2
30% Off	case 16	1
30% Off	case 17	40
30% Off	case 2	1
30% Off	case 3	17
30% Off	case 4	4
30% Off	case 5	9
30% Off	case 6	34
30% Off	case 7	6
30% Off	case 9	11
30% Off	In Transit To|Store 1|||11/5/2013	1
30% Off	In Transit To|Store 2|fedex|12345678|11/7/2013	1

2. Select the record containing the type of signage you would like to generate. You have a few options as to the order and number of signs you would like to print.

Organize by Location	Organizes the signs by the location of the included items within the store.
Organize by Start Date	Organizes the signs by the starting date of the event.
Organize by Vendor	Organizes the signs by the vendor providing the items.
First N Records	Allows you to indicate the number of signs to print at one time.
Sort Signage By	Sorts by location, item number, or old item number.

3. To generate a preview of the signs before printing, select **Print** from the lower right corner of the window or double-click on the desired record. The **Print Preview** window will appear as follows:



4. If the layout and information are acceptable, select the **Print** icon on the left side of the toolbar across the top of the window. If you want to further edit the page, select the **Close** button. Use the arrows in the top left corner to view additional pages.

Signs must be created as described in the section entitled Sign Formats before they can be printed.

3.7 Physical Inventory

Conducting a **Physical Inventory** consists of 3 steps:

1 - Start the Inventory
- Choose what is being inventoried

2 - Conduct the Inventory
- Scan or enter items

3 - Reconcile & Finish
- Review and account for discrepancies
- Finish (close) the inventory

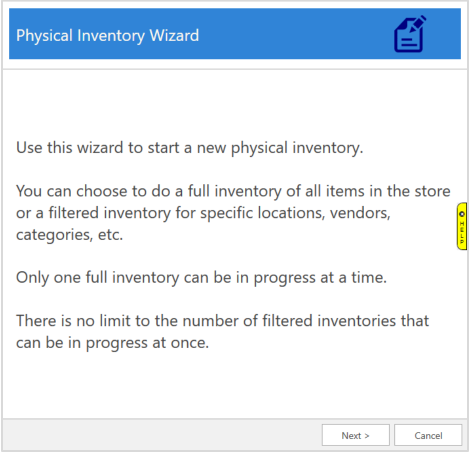
3.7.1 Step 1 - Start the Inventory

The **Physical Inventory Wizard** allows you to select what is being inventoried. You can do a full inventory of the entire store or a filtered inventory for selected criteria (locations, vendors, collections, categories, etc.)

Only one full inventory can be open at a time. There is no limit to the number of open filtered inventories. See **FAQ** section for more information on running multiple inventories at once.

To start an inventory:

1. Click **Inventory** > **Physical Inventory** > **Start New Inv**. The **Physical Inventory Wizard** will appear. Click **Next** to begin.



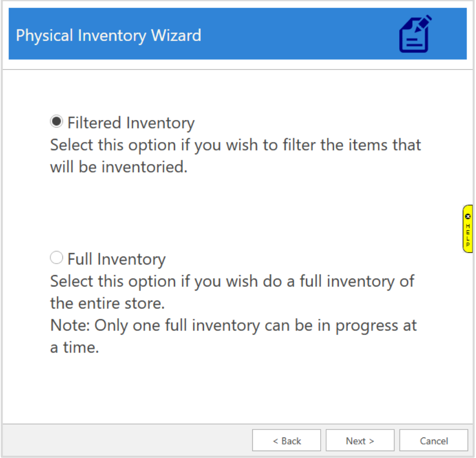
Use this wizard to start a new physical inventory.

You can choose to do a full inventory of all items in the store or a filtered inventory for specific locations, vendors, categories, etc.

Only one full inventory can be in progress at a time.

There is no limit to the number of filtered inventories that can be in progress at once.

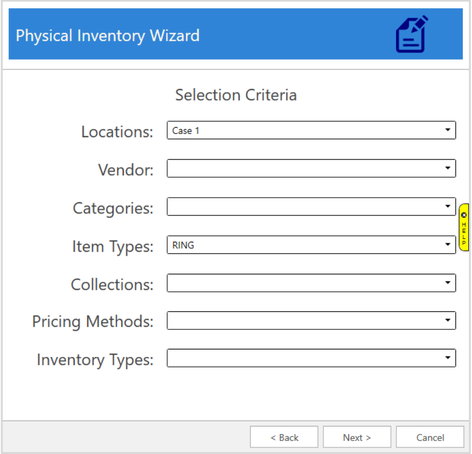
2. Choose whether doing a **Full Inventory** or **Filtered Inventory**, then click **Next.** Only one full inventory can be open at a time. If this option is greyed out, you must finish or cancel the existing inventory. There is no limit to the number of **Filtered Inventories** you can have open at once.



● Filtered Inventory
Select this option if you wish to filter the items that will be inventoried.

○ Full Inventory
Select this option if you wish do a full inventory of the entire store.
Note: Only one full inventory can be in progress at a time.

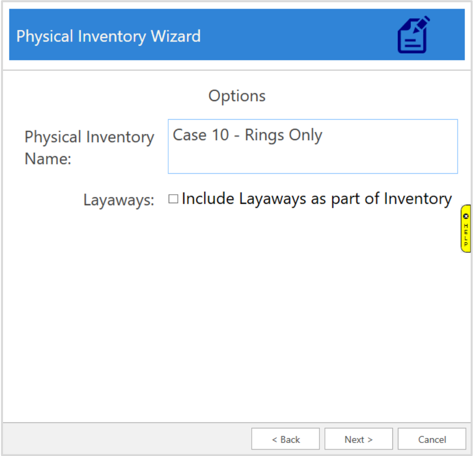
3. If doing a **Filtered Inventory**, use the **Selection Criteria** drop-downs to set one or more parameters for items to be included in this inventory. Leaving a drop-down blank will automatically include all values. Choose criteria and click **Next**. If doing a **Full Inventory**, this step is skipped automatically.



Selection Criteria

Locations: Case 1
Vendor:
Categories:
Item Types: RING
Collections:
Pricing Methods:
Inventory Types:

4. Enter a **Physical Inventory Name**, choose whether **Layaways** should be included, then click **Next**.



Physical Inventory Wizard

Options

Physical Inventory Name: Case 10 - Rings Only

Layaways: ☐ Include Layaways as part of Inventory

5. Click **Finish**. The inventory is now created and the **Scanning** window will appear. See **Step 2 - Conduct the Inventory** for the next step in the inventory process.

3.7.2 Step 2 – Conduct the Inventory

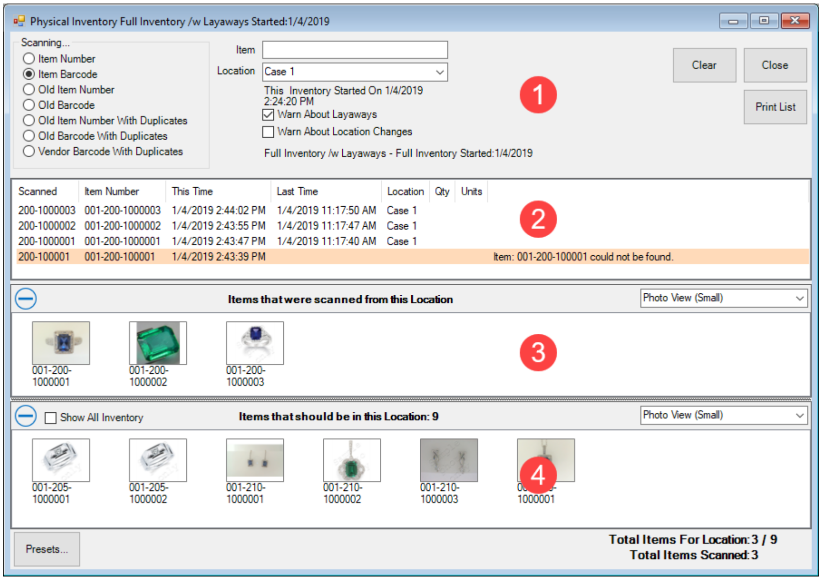
Upon creating a new inventory, The Edge will automatically open the **Scanning** window. This is used to inventory your items. You can manually get to this screen using **Inventory > Physical Inv > Continue Inv.**

To inventory your items:

1. In the top left, choose how you will be inputting items for inventory (e.g. barcode, item #).
2. If using locations, choose the location you are working with, then input all items. Repeat for each location.
3. Notice as you input items the activity log (second pane) updates. Any warnings or errors will display here. The bottom two panes also update to show items inventoried and outstanding.
4. You can close and continue this process later at any time. Use **Inventory > Physical Inv > Continue Inv** to resume an in progress inventory.
5. Once all items inventoried, see **Step 3 – Reconcile & Finish** for the final steps.

3.7.2.1 Scanning Window Overview

The **Scanning** window is divided into four sections:



Physical Inventory Full Inventory /w Layaways Started:1/4/2019

Scanning...
- ○ Item Number
- ● Item Barcode
- ○ Old Item Number
- ○ Old Barcode
- ○ Old Item Number With Duplicates
- ○ Old Barcode With Duplicates
- ○ Vendor Barcode With Duplicates

Item:
Location: Case 1

This Inventory Started On 1/4/2019 2:24:20 PM

☑ Warn About Layaways
☐ Warn About Location Changes

Full Inventory /w Layaways - Full Inventory Started:1/4/2019

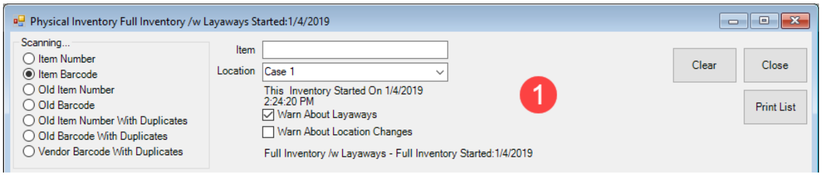
Scanned	Item Number	This Time	Last Time	Location	Qty	Units	
200-1000003	001-200-1000003	1/4/2019 2:44:02 PM	1/4/2019 11:17:50 AM	Case 1			
200-1000002	001-200-1000002	1/4/2019 2:43:55 PM	1/4/2019 11:17:47 AM	Case 1			
200-1000001	001-200-1000001	1/4/2019 2:43:47 PM	1/4/2019 11:17:40 AM	Case 1			
200-100001	001-200-100001	1/4/2019 2:43:39 PM					Item: 001-200-100001 could not be found.

Items that were scanned from this Location — Photo View (Small)

☐ Show All Inventory — Items that should be in this Location: 9 — Photo View (Small)

Total Items For Location: 3 / 9
Total Items Scanned: 3

The top section lets you specify input options.



Physical Inventory Full Inventory /w Layaways Started:1/4/2019

Scanning...
- ○ Item Number
- ● Item Barcode
- ○ Old Item Number
- ○ Old Barcode
- ○ Old Item Number With Duplicates
- ○ Old Barcode With Duplicates
- ○ Vendor Barcode With Duplicates

Item:
Location: Case 1

This Inventory Started On 1/4/2019 2:24:20 PM

☑ Warn About Layaways
☐ Warn About Location Changes

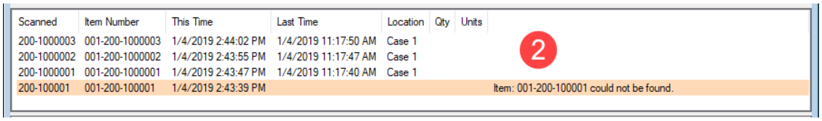
Full Inventory /w Layaways - Full Inventory Started:1/4/2019

Scanning… Choose how to input items:

Item Number	Manually key item # into Item field
Item Barcode	Scan barcode into this screen
Old Item Number	Manually key item # from previous software
Old Barcode	Scan barcode from previous software
Old Item Number with Duplicates	Manually key item # from previous software where multiple items can have same number
Old Barcode with Duplicates	Scan barcode from previous software where multiple items can have same barcode
Vendor Barcode with Duplicates	Scan barcode from vendor where multiple items can have same barcode

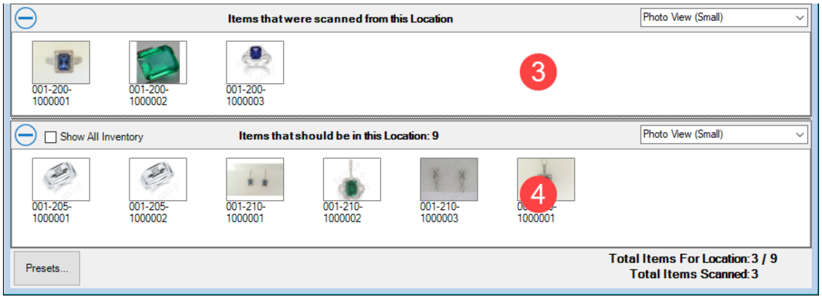
Item	Use this field to manually key in item # or old item #s
Location	Use this drop-down to select a location. Inventorying an item will move it to this location.
Warn about Layaways	If checked, layaways will generate a warning when inventoried.
Warn About Location Changes	If checked, inputting an item to a location different than the one currently on file will result in a pop-up window asking you to confirm moving it to the new location.
Clear	Use this button to clear the form. It does NOT undo any inventory activity.
Close	Use this button to close the window. It does NOT undo any inventory activity nor does it finish or close the inventory.
Print List	Use this button to print either the middle or bottom lists.

The next section keeps a running log as you input items. Errors and warnings will also appear here.



Scanned	Item Number	This Time	Last Time	Location	Qty	Units	
200-1000003	001-200-1000003	1/4/2019 2:44:02 PM	1/4/2019 11:17:50 AM	Case 1			
200-1000002	001-200-1000002	1/4/2019 2:43:55 PM	1/4/2019 11:17:47 AM	Case 1			
200-1000001	001-200-1000001	1/4/2019 2:43:47 PM	1/4/2019 11:17:40 AM	Case 1			
200-100001	001-200-100001	1/4/2019 2:43:39 PM					Item: 001-200-100001 could not be found.

The bottom two sections show items that were inventoried as well as those items that are still outstanding. By default, the outstanding items for the selected location will be shown. To see all items, check the **Show All Inventory** box. This may negatively affect performance based on the number of items in the inventory.



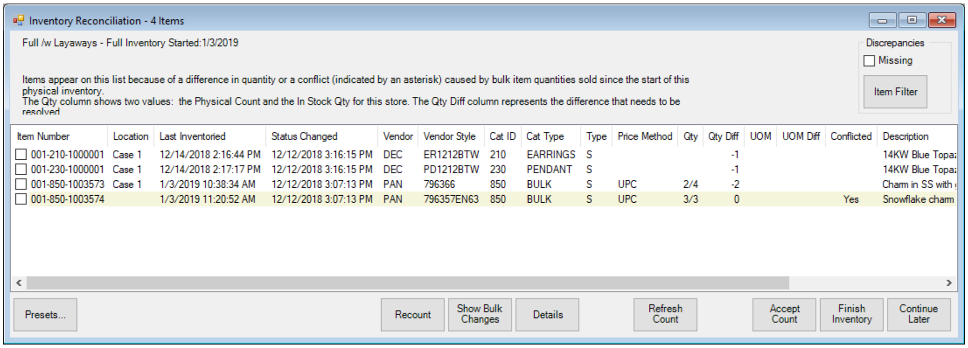
Total Items For Location: 3 / 9
Total Items Scanned: 3

NOTE: You can view an item's record by double clicking on it in the window. In addition to seeing its details, this can be useful if you accidentally inventory an item as you can use **Supervisor > Remove Last Inventory Date** to un-inventory it.

3.7.3 Step 3 – Reconcile & Finish

The last step in the inventory process is reconciliation. This is where you review discrepancies, make any final adjustments, and then finish (close) the inventory.
To begin reconciliation:

1. Click **Inventory > Physical Inv > Finish Inv**, then **Select** the inventory you are working with. The **Inventory Reconciliation** window will appear.


Inventory Reconciliation - 4 Items

Full /w Layaways - Full Inventory Started:1/3/2019

Items appear on this list because of a difference in quantity or a conflict (indicated by an asterisk) caused by bulk item quantities sold since the start of this physical inventory.
The Qty column shows two values: the Physical Count and the In Stock Qty for this store. The Qty Diff column represents the difference that needs to be resolved

Item Number	Location	Last Inventoried	Status Changed	Vendor	Vendor Style	Cat ID	Cat Type	Type	Price Method	Qty	Qty Diff	UOM	UOM Diff	Conflicted	Description
☐ 001-210-1000001	Case 1	12/14/2018 2:16:44 PM	12/12/2018 3:16:15 PM	DEC	ER1212BTW	210	EARRINGS	S			-1				14KW Blue Topa
☐ 001-230-1000001	Case 1	12/14/2018 2:17:17 PM	12/12/2018 3:16:15 PM	DEC	PD1212BTW	230	PENDANT	S			-1				14KW Blue Topa
☐ 001-850-1003573	Case 1	1/3/2019 10:38:34 AM	12/12/2018 3:07:13 PM	PAN	796366	850	BULK	S	UPC	2/4	-2				Charm in SS with
☐ 001-850-1003574		1/3/2019 11:20:52 AM	12/12/2018 3:07:13 PM	PAN	796357EN63	850	BULK	S	UPC	3/3	0			Yes	Snowflake charm

2. This window will display all item discrepancies. A discrepancy indicates that the quantity inventoried does not match the quantity on file. The **Qty Diff** and **UOM Diff** (Bulk only) columns indicate the difference in number or, for UOM bulk, difference in measure (weight).
3. Review each discrepancy. Then, take the following action:
   a. If the discrepancy is correct (e.g. item missing), check the line and click **Accept Count**. This will mark the **Qty Diff** and **UOM Diff** (bulk only) as missing.
   b. If the discrepancy is incorrect, check the line and click **Recount**. For fine jewelry, this will mark the individual piece inventoried. For bulk, you will be prompted for new quantity (you can enter a **New Total** or **Add** to the existing inventoried quantity).
   c. For bulk only, if after **Recount** there is still a **Qty Diff** and/or **UOM Diff**, you must check the item and **Accept Count** to finalize and accept the change in quantity.
4. Notice each discrepancy line highlights in green as you work through the list. Once you have addressed each discrepancy all lines should be highlighted green.
5. Click the **Refresh Count** button at the bottom. If all discrepancies were successfully addressed, the screen should now be empty.
6. Click **Finish Inventory** to complete and close this inventory.

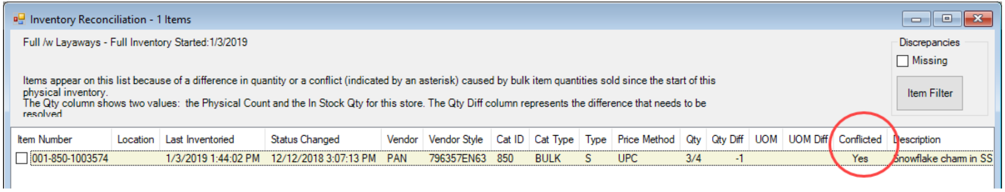
NOTE: To pause reconciliation, use the Continue Later button to close this screen. You can resume at any time via Inventory > Physical Inventory > Finish Inv.

NOTE: Though not typically recommended, you are not required to address all discrepancies and will still be able to close the inventory via the Finish Inventory button.

You may find this useful if dealing with layaway or special order discrepancies that cannot be resolved here.

3.7.3.1 *Bulk Conflicts*

The **Conflicted** column on the **Inventory Reconciliation** screen will indicate **Yes** when a bulk item has had its quantity changed outside of the inventory process. Examples might include an item being sold, added, etc.



Full /w Layaways - Full Inventory Started:1/3/2019

Items appear on this list because of a difference in quantity or a conflict (indicated by an asterisk) caused by bulk item quantities sold since the start of this physical inventory.
The Qty column shows two values: the Physical Count and the In Stock Qty for this store. The Qty Diff column represents the difference that needs to be resolved

Item Number	Location	Last Inventoried	Status Changed	Vendor	Vendor Style	Cat ID	Cat Type	Type	Price Method	Qty	Qty Diff	UOM	UOM Diff	Conflicted	Description
☐ 001-850-1003574		1/3/2019 1:44:02 PM	12/12/2018 3:07:13 PM	PAN	796357EN63	850	BULK	S	UPC	3/4	-1			Yes	Snowflake charm in SS

The purpose of **Conflicted** is to draw your attention to this change to ensure your count is accurate. To see what caused the changed, check the item row and click the **Show Bulk Changes** button at the bottom.

It is not necessary to do anything with these conflicts. This is simply provided as a tool to help identify potential causes of discrepancies.

3.7.3.2 *Layaway & Special Orders*

Items on layaway and/or special order can be included in the inventory process. However, if there is a discrepancy in quantity, it cannot be addressed from the **Inventory Reconciliation** screen because it is tied to an ongoing transaction.
To account for missing layaway or special order items:

1. Process a return for the layaway or special order transaction at POS.
2. Manually mark the item missing via **Inventory** > **Item** > **Find**, **Edit** the item, then click **Supervisor** > **Missing**.

3.7.3.3 *Canceling an Inventory without Finishing*

To cancel an open inventory without finishing:

1. Click **Inventory** > **Physical Inv** > **Continue Inv** or **Finish Inv**.
2. Click on the inventory, then click the **Cancel Inventory** button in the bottom left.

3.7.4 Reports

There are four physical inventory reports available all found under **Inventory** > **Physical Inv** > **Reports**:

Not Scanned	All items part of this inventory that were not scanned

Scanned	All items part of this inventory that were scanned
Missing	All items marked missing during this particular inventory
Errors	Log of all inventory errors

The **Not Scanned, Scanned**, and **Missing** reports are all inventory specific and run the same way. To run:

1. Click **Inventory > Physical Inv > Reports** and select the report you wish to view.
2. By default, the drop-down will only show open inventories. Use the **Show Closed Inventories** checkbox if you want to run the report against a closed inventory.
3. Choose the inventory for which you want to run this report.
4. Optionally, visit the **Options** tab to change the report details and layout.
5. Click **OK** to generate the report.

The **Errors** report functions differently and is date driven. To run:

1. Click **Inventory > Physical Inv > Reports** > **Errors**.
2. Use the **Error Dates** drop-down to select the dates for which you wish to view errors. It is recommended you only set the **Min** date as the start and leave **Max** at the default.
3. Use the **Error Descriptions** drop-down to select the types of errors you wish to view.
4. Visit the **Options** tab to change report details and layout. If you have run multiple inventories, group by **Inventory Cycle** to separate the errors by physical inventory.
5. Click **OK** to generate the report.

3.7.5 Frequently Asked Questions (FAQ)

How do I "un-scan" or "un-inventory" an item that I've entered by mistake?

To remove an item's last inventory date:

1. Edit the item. Note that you can do this from the Scanning screen by double clicking.
2. Click **Supervisor > Remove Last Inventory Date**.
3. Save your changes.

The Edge records the last 2 dates an item was inventoried. Using this option will remove the most recent date and retain the prior one. If you use this option twice it will remove all dates.

How do I cancel an inventory?

To cancel an open inventory:

1. Click Inventory > Physical Inv > Continue or Finish Inv.
2. Highlight the inventory you wish to cancel.
3. Click the Cancel Inventory button in the bottom left.

What happens if I run multiple physical inventories at the same time?

All physical inventories are date driven. When you create a new inventory, the software records the start date. As you scan items, the item record is updated with the scanned date. When determining if an item was inventoried, The Edge compares the item's scanned date to the inventory start date. If the scanned date is AFTER the start date, the item is counted as scanned for that inventory.

For example, let's say you start a full inventory on 12/26/2018 and scan item 100-00001. Then, you start a filtered inventory for category 100 on 12/28/2018. Running the scanned report for your full inventory would yield the one item; running the scanned report for your partial inventory would yield no item because the item was scanned on 12/26, but the filtered inventory was started on 12/27.

If as part of your filtered category 100 inventory, you now scanned item 100-00002 that item would count as scanned against both your full inventory and the filtered inventory. Running the scanned report for the full inventory would show both items while running the scanned report for the partial inventory would only show 100-00002.

On the Finish Inv screen, what is the purpose of Recount and Accept Count?

These buttons are used to address inventory discrepancies.
For fine jewelry pieces:

- **Recount** will mark the item as inventoried.
- **Accept Count** will mark the item as missing.

For bulk pieces:

- **Recount** will open a window allowing you to adjust the quantity. You can either enter a new quantity or add to the existing.
- **Accept Count** will accept the discrepancy and adjust inventory with either the missing or found items.

3.7.6 Configuring RFID for The Edge

RFID will usually be set up and configured by your RFID vendor. This information is provided for informational purposes. To configure the RFID server and hardware:

1. From **Administrative ► Configuration**, scroll down to RFID.
2. Set options as follows:

RFID Config File Path	The location of the RFID configuration file. Use the standard Windows **Open File** window to find the file. The RFID vendor should provide this file and the path to it.

RFID Maintains Connection	Whether the RFID device maintains a connection while scanning.
RFID Server Type	The type of server for the RFID device. For TJS, it is Insite. For TracTech, it is Impinj.

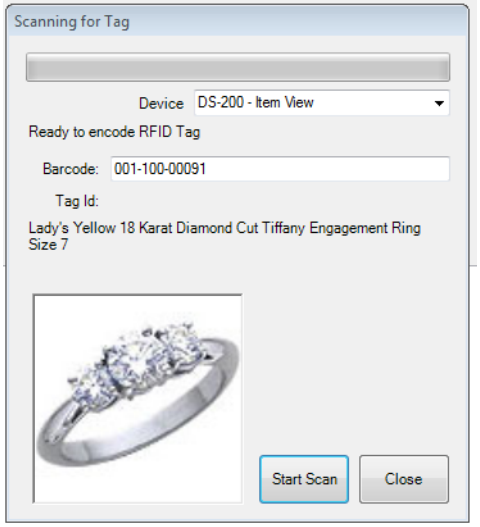
3. Select **OK**.

3.7.7 Tagging RFID Items

- **No two in-stock items can have the same RFID tag.**
- **You cannot save a tag that is saved to an item already without removing it from the old item first.**
- **Bulk items cannot have RFID tags assigned to them.**

To associate tags provided by your RFID hardware vendor with the item records in The Edge:

1. From the **Inventory** menu, select **Tag RFID Items**. The **Scanning for Tag** window will appear.



Scanning for Tag

Device: DS-200 - Item View

Ready to encode RFID Tag

Barcode: 001-100-00091

Tag Id:

Lady's Yellow 18 Karat Diamond Cut Tiffany Engagement Ring Size 7

Fields and options in the **Scanning for Tag** window include:

Device	Indicates the scanning device.
Barcode	The barcode of the item to be tagged.
Tag ID	The RFID tag number.
Description	A description of the item.
Start Scan	Allows you to scan the tag number.

2. From the **Device** drop-down menu, select which device you are using to scan the tag.
3. Using a barcode reader, read or type in the barcode for the item to come up.
4. For some systems, place the item with the tag in the scanning box.
5. Select **Start Scan** button and scan the individual tag you want to assign to the item. The green bar will start moving across the form indicating that the tag reader is scanning. After the tag is registered, it will be assigned to the item and indicate the tag ID in the **Tag Id** field.
6. The form will pause for two seconds and then reset itself so you can repeat for additional items.
7. Close out of the form.

If a tag is already assigned to another in-stock item, you will be prompted to assign this tag to the current item and remove it from the other item.

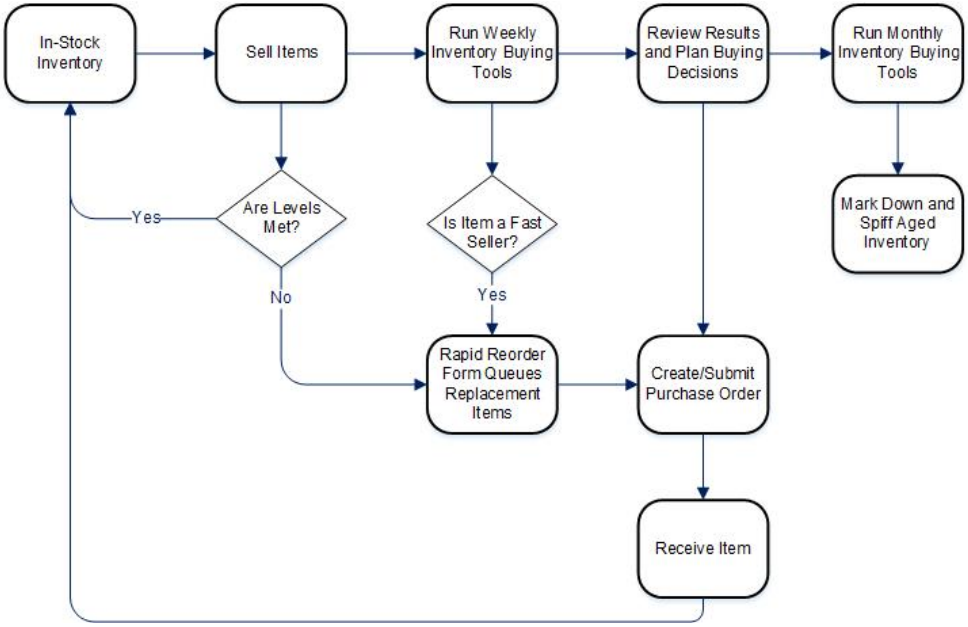
Alternatively, you can assign RFID tags to an item in two other ways:

1. Use **Inventory ► Items ► Find** to locate the item. From the search results, select **Supervisor ► Assign RFID Tag**.
2. From the item record select **Supervisor ► Assign RFID Tag**.

3.8 Inventory Buying Tools

Inventory management is the single biggest factor in the success of a retail business. Your goal is to sell as much product at the highest price from the smallest investment possible. To do so, you must vigilantly monitor, measure, and adjust your activities to make the most of your inventory with educated decisions. The Edge features a series of buying tools and reports to help you move older inventory and replenish more popular items. These tools work together to take a proactive approach to managing aging inventory. Popular inventory can be set to be automatically reordered and potentially profitable categories can be identified using your sales data through a series of reports. Aging inventory is managed through a tiered system of assigning spiff and price markdowns to items dynamically as they age.

In general, here's how it works: Items come in and you sell them. Based on sales history and trends, The Edge's **Levels** and **Rapid Reorder** features work together to queue good sellers for replacement. Then the **Purchase Order** feature makes it easy to retrieve queued items, order them, and receive them into stock. All the while, the Edge tracks sales data and through the use of the **Inventory Buying Tools**, which will help make strategic decisions about what you should obtain more of what sells and what you should do to move old inventory.



There are two steps to using the **Inventory Buying Tools**:

The **Weekly Buying Plan**

a. **Rapid Reorder Report** with **Form** option
b. **Replenish Base Stock** report
c. **Recovered Cost of Aged Items** report.

The **Monthly Aged Inventory Management System (AIMS)**

a. **Repricing**
b. **Bonus Poster** generation
c. **Signage Location** report.

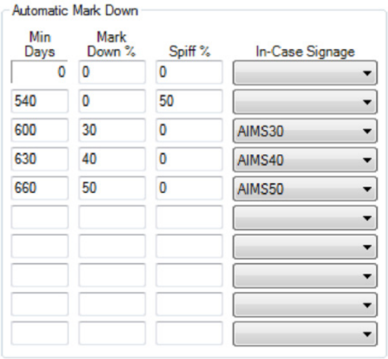
This section details how to use these features. If you use the inventory management and reporting features discussed here along with the reporting features, The Edge will help maximize your profits.

3.8.1 Setting Up Automatic Mark Downs and Repricing for Inventory Buying Tools

At the heart of automatic buying tools is the **Automatic Mark Down** table found on the **Pricing** tab of each category. The Mark Down table is used to define mark down amounts based on aging and should be setup for each participating category. Repricing goes through and applies the mark downs to selected items.

To setup the **Automatic Mark Down** table:

1. Select **Inventory ► Categories ► List**.
2. Select the category and edit it.
3. Select the **Pricing** tab and look at the **Automatic Mark Down** table on the right.



Automatic Mark Down

Min Days	Mark Down %	Spiff %	In-Case Signage
0	0	0	
540	0	50	
600	30	0	AIMS30
630	40	0	AIMS40
660	50	0	AIMS50

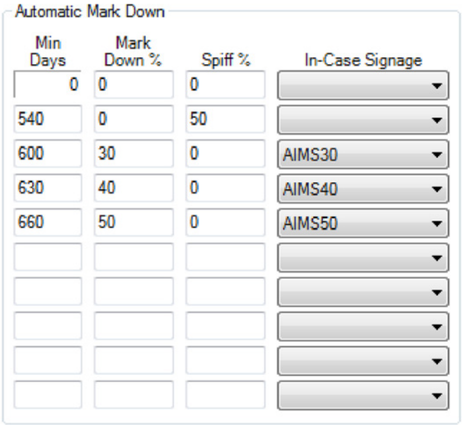
Fields in this table include:

Min Days	Number of days an item must be in inventory before assigned the prescribed action.
Mark Down %	Percentage to discount from item's retail price.
Spiff %	Percentage of profit to award an associate as commission for the sale of this item. Spiff supersedes commission.

In-Case Signage	Specify a sign template to use to generate a sign when this action taken (e.g., generate in-case sale signs to accompany items placed on sale).

4. Setup the table as desired for each participating category. Use the **Copy From** button in the top right to copy the pricing tables from another category to the category currently being edited.

The example mark down table provided here shows our default setup.



Automatic Mark Down

Min Days	Mark Down %	Spiff %	In-Case Signage
0	0	0	
540	0	50	
600	30	0	AIMS30
630	40	0	AIMS40
660	50	0	AIMS50

Using this example, an item is considered old when it becomes 540 days old. At this point, a spiff of 50 percent is assigned. This means that if an associate sells this item they are assigned a commission of 50 percent of the profit generated.

When the item reaches 600 days old, the spiff is removed and a mark down of 30 percent is applied against the retail price. Also, a sign is queued for print using the “AIMS30” sign template.

When the item reaches 630 days old, the mark down changes from 30 percent to 40 percent and a new sign is generated using the “AIMS40” sign template. Finally, when the item reaches 660 days old, the mark down changes from 40 percent to 50 percent and a new sign is generated using the “AIMS50” sign template.

The spiff and mark downs do not happen without user intervention. Repricing must be initiated with the Buying Tools options enabled.

Repricing must be run with either from the **Reprice** area from the **Administrative** menu or run as part of the larger monthly **AIMS** process. While this can be done at any time, it is recommended this be done once per month in a consistent cycle (e.g., first Monday of every month).

To initiate a standalone AIMS repricing:

1. Select **Administrative** ► **Reprice Items**.
2. Select the **Item Filter** to specify inventory to include/exclude based on category, vendor, inventory type, etc. Alternatively, leave this blank to include all qualifying items.
3. Select the default settings for each **Change** pricing section (i.e., **Change Cost**, **Change Retail**, **Change Lowest Price**, and **Change Current Price**). The defaults are as follows.

Change Cost	No change.
Change Retail	No change.
Change Lowest Price	No change.
Change Current Price	Retail x Age Markdown Check do Signage and spiff Check Auto-price items only

4. Select **OK**. A preview list of items eligible for automatic mark down will be presented. The list will show each qualifying item along with pertinent details including the old and new pricing information.
5. Select the items to reprice and select **OK** to finalize the repricing.

- **In-case signage will be queued for print any time a sign template is assigned to a markdown. Select Inventory ► Print Signage to view and print these signs.**
- **See the section entitled Sign Formats for more information on working with sign templates.**

For repricing, there is no undo. Consider printing and retaining the repricing preview list.

3.8.2 Using Inventory Buying Tools

The **Inventory Buying Tools** feature consists of six steps and is designed to fulfill two roles:

- **Weekly inventory orders and reorders**
- **Monthly AIMS repricing.**

These two roles are not dependent on one another and it is entirely possible to use either exclusively. However, the system works best when both are employed side-by-side.

3.8.2.1 Weekly Buying Plan

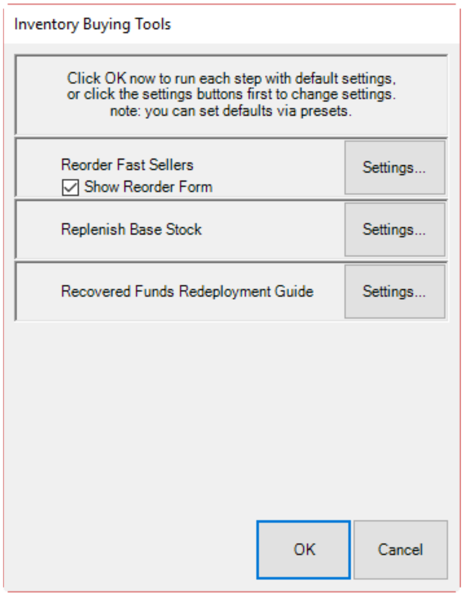
To run **Inventory Buying Tools**:

1. Select **Inventory** ► **Buying Tools**.
2. Select **Weekly Buying Plan.** The **Weekly Buying Plan** includes:
   a. **Reorder Fast Sellers**, which yields the **Rapid Reorder Report** and **Form**. This step is used to setup the rapid reorder report and form. From the **Settings** options, the sale date range should

always be **Last Week** (it will default to this; this step is designed to be run weekly). See the section entitled Rapid Reorder for more information on setting fast seller and reorder criteria.

b. **Replenish Base Stock** report. This step will setup a report to aid in replenishing current sold inventory. From the **Settings** options, "current" refers to items that did not sell fast enough to be considered fast sellers, but did not sell slow enough to become aged inventory. The sale date range should always be **Last Week** (it will default to this; this step is designed to be run weekly).

c. **Recovered Funds Redeployment Guide**. This step will setup a report to aid in the reinvestment of funds recovered through the sale of old inventory. From **Settings**, on the **Type & Status** tab, **Date Sold** should always be **365 days** (it will default to this).



Click OK now to run each step with default settings, or click the settings buttons first to change settings. note: you can set defaults via presets.

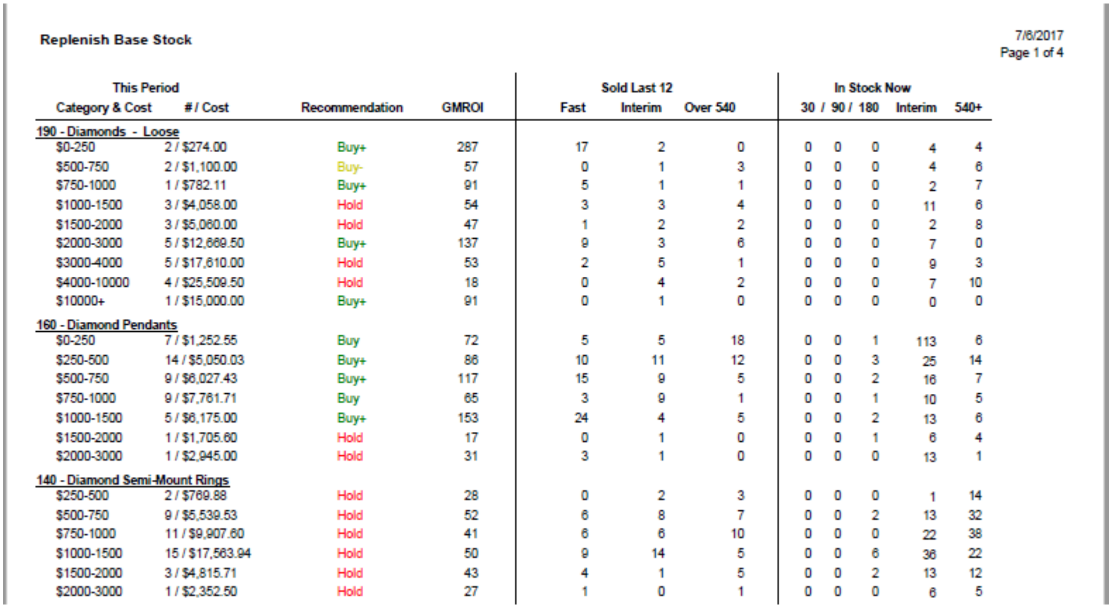
Reorder Fast Sellers

There are two outputs for this step: the **Rapid Reorder** form and the **Rapid Reorder** report. Both the report and the form show the same data, albeit in slightly different formats. The report is designed to be viewed and printed for analysis. The form, on the other hand, is designed to be acted upon. It allows styles to be queued for order. See the section entitled Rapid Reorder for more information.

Replenish Base Stock

Base stock refers to inventory that did not sell fast enough to qualify as a fast seller, but did not take long enough to sell to be considered old inventory. It is inventory considered worthy of keeping in stock regularly. In The Edge, an item is considered old once it reaches the second tier of the automatic mark down table. By default, this happens at 540 days.

In this report, sold items are shown based on items sold the past 365 days grouped by category. It is further broken down by price groupings. For each grouping, based on GMROI and the length of time it was held in inventory, The Edge makes a recommendation as to whether you should buy more or hold at the level you have.



Replenish Base Stock

7/6/2017
Page 1 of 4

This Period				Sold Last 12			In Stock Now				
Category & Cost	# / Cost	Recommendation	GMROI	Fast	Interim	Over 540	30 /	90 /	180	Interim	540+
190 - Diamonds - Loose											
$0-250	2 / $274.00	Buy+	287	17	2	0	0	0	0	4	4
$500-750	2 / $1,100.00	Buy-	57	0	1	3	0	0	0	4	6
$750-1000	1 / $782.11	Buy+	91	5	1	1	0	0	0	2	7
$1000-1500	3 / $4,058.00	Hold	54	3	3	4	0	0	0	11	6
$1500-2000	3 / $5,060.00	Hold	47	1	2	2	0	0	0	2	8
$2000-3000	5 / $12,669.50	Buy+	137	9	3	6	0	0	0	7	0
$3000-4000	5 / $17,610.00	Hold	53	2	5	1	0	0	0	9	3
$4000-10000	4 / $25,509.50	Hold	18	0	4	2	0	0	0	7	10
$10000+	1 / $15,000.00	Buy+	91	0	1	0	0	0	0	0	0
160 - Diamond Pendants											
$0-250	7 / $1,252.55	Buy	72	5	5	18	0	0	1	113	6
$250-500	14 / $5,050.03	Buy+	86	10	11	12	0	0	3	25	14
$500-750	9 / $6,027.43	Buy+	117	15	9	5	0	0	2	16	7
$750-1000	9 / $7,761.71	Buy	65	3	9	1	0	0	1	10	5
$1000-1500	5 / $6,175.00	Buy+	153	24	4	5	0	0	2	13	6
$1500-2000	1 / $1,705.60	Hold	17	0	1	0	0	0	1	6	4
$2000-3000	1 / $2,945.00	Hold	31	3	1	0	0	0	0	13	1
140 - Diamond Semi-Mount Rings											
$250-500	2 / $769.88	Hold	28	0	2	3	0	0	0	1	14
$500-750	9 / $5,539.53	Hold	52	6	8	7	0	0	2	13	32
$750-1000	11 / $9,907.60	Hold	41	6	6	10	0	0	0	22	38
$1000-1500	15 / $17,563.94	Hold	50	9	14	5	0	0	6	36	22
$1500-2000	3 / $4,815.71	Hold	43	4	1	5	0	0	2	13	12
$2000-3000	1 / $2,352.50	Hold	27	1	0	1	0	0	0	6	5

Data fields shown in the **Replenish Base Stock** report include:

Category & Cost The category and cost range being presented.

 # / Cost The cost range within the category being presented.

Recommendation The Edge's recommendation as to whether to acquire more items in this category and cost range.

- If **Category** and **Cost GMROI** is over 20 percent greater than **Total GMROI** for that category, then Buy+ (+ indicates that you should buy several).
- If **Category** and **Cost GMROI** is up to 20 percent greater than **Total GMROI** for that category, then Buy.
- If **Category** and **Cost GMROI** is less than **Total GMROI** for that category, but by less than 10 percent, then Buy- (- indicates that you should buy a small number).
- If **Category** and **Cost GMROI** is less than **Total GMROI** for that category by 10 percent or more, then Hold.

GMROI The gross margin return on investment. The formula used to calculate this is profit divided by the cost of inventory.

Sold Last 12	The quantity of items in the category and cost range sold within the last 12 months. The quantity is broken down by turnover time: fast seller, interim seller, and those that took over 540 days to sell.
In Stock	The quantity of items in the category in stock. This broken down into the quantity that has been on hand for less than 540 days and more than 540 days.

In the example above, in category 190, Loose Diamonds in the cost range of $0-$250, the recommendation is buy more because of 19 sold, 17 were fast sellers. We would recommend that you invest more in that area. In category 140, Diamond Semi-Mount Rings in the cost range of $250-$500, of 5 pieces sold, 0 were fast sellers and 2 were interim sellers. We would recommend you hold with the current inventory for the time being.

Selecting values in the following columns will bring up the list containing the items that make up the quantity value for that column:

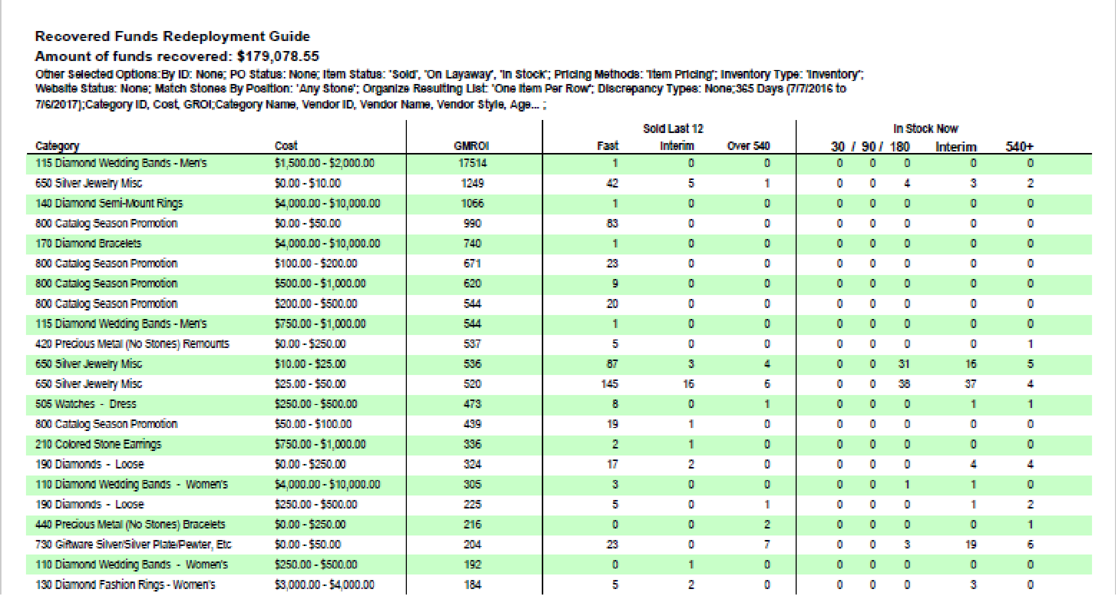
- # / Cost
- Fast (Sold Last 12)
- Interim (Sold Last 12)
- Over 540 (Sold Last 12)
- Under 540 (In Stock)
- 540+ (In Stock).

Ultimately, this report helps to keep a pulse on where inventory is moving and where money should be invested. The focus is not on exact style replacement, but rather on identifying areas of inventory that perform reliably to suggest where inventory should be maintained. Different styles in that category might give you more variety for your repeat customers who like these types of items.

This report is a more streamlined version of the **Replenish Current Inventory** report, which was moved to **Reports**; for more about that report, see the section entitled Replenish Current Inventory Report.

Recovered Funds Redeployment Guide

The output for this step is the **Recovered Funds Redeployment Guide**. This report suggests categories that, because they performed well based on ROI, would make good areas where money recovered through the sale of old inventory could be reinvested.



Recovered Funds Redeployment Guide

Amount of funds recovered: $179,078.55

Other Selected Options:By ID: None; PO Status: None; Item Status: 'Sold', 'On Layaway', 'In Stock'; Pricing Methods: 'Item Pricing'; Inventory Type: 'Inventory'; Website Status: None; Match Stones By Position: 'Any Stone'; Organize Resulting List: 'One Item Per Row'; Discrepancy Types: None;365 Days (7/7/2016 to 7/6/2017);Category ID, Cost, GROI;Category Name, Vendor ID, Vendor Name, Vendor Style, Age... ;

			Sold Last 12			In Stock Now				
Category	Cost	GMROI	Fast	Interim	Over 540	30 /	90 /	180	Interim	540+
115 Diamond Wedding Bands - Men's	$1,500.00 - $2,000.00	17514	1	0	0	0	0	0	0	0
650 Silver Jewelry Misc	$0.00 - $10.00	1249	42	5	1	0	0	4	3	2
140 Diamond Semi-Mount Rings	$4,000.00 - $10,000.00	1066	1	0	0	0	0	0	0	0
800 Catalog Season Promotion	$0.00 - $50.00	990	83	0	0	0	0	0	0	0
170 Diamond Bracelets	$4,000.00 - $10,000.00	740	1	0	0	0	0	0	0	0
800 Catalog Season Promotion	$100.00 - $200.00	671	23	0	0	0	0	0	0	0
800 Catalog Season Promotion	$500.00 - $1,000.00	620	9	0	0	0	0	0	0	0
800 Catalog Season Promotion	$200.00 - $500.00	544	20	0	0	0	0	0	0	0
115 Diamond Wedding Bands - Men's	$750.00 - $1,000.00	544	1	0	0	0	0	0	0	0
420 Precious Metal (No Stones) Remounts	$0.00 - $250.00	537	5	0	0	0	0	0	0	1
650 Silver Jewelry Misc	$10.00 - $25.00	536	87	3	4	0	0	31	16	5
650 Silver Jewelry Misc	$25.00 - $50.00	520	145	16	6	0	0	38	37	4
505 Watches - Dress	$250.00 - $500.00	473	8	0	1	0	0	0	1	1
800 Catalog Season Promotion	$50.00 - $100.00	439	19	1	0	0	0	0	0	0
210 Colored Stone Earrings	$750.00 - $1,000.00	336	2	1	0	0	0	0	0	0
190 Diamonds - Loose	$0.00 - $250.00	324	17	2	0	0	0	0	4	4
110 Diamond Wedding Bands - Women's	$4,000.00 - $10,000.00	305	3	0	0	0	0	1	1	0
190 Diamonds - Loose	$250.00 - $500.00	225	5	0	1	0	0	0	1	2
440 Precious Metal (No Stones) Bracelets	$0.00 - $250.00	216	0	0	2	0	0	0	0	1
730 Giftware Silver/Silver Plate/Pewter, Etc	$0.00 - $50.00	204	23	0	7	0	0	3	19	6
110 Diamond Wedding Bands - Women's	$250.00 - $500.00	192	0	1	0	0	0	0	0	0
130 Diamond Fashion Rings - Women's	$3,000.00 - $4,000.00	184	5	2	0	0	0	0	3	0

Data fields in the **Recovered Funds Redeployment Guide** include:

Category	The category being presented.
Cost	The cost range within the category being presented.
GMROI	The gross margin return on investment. The formula used to calculate this is profit divided by the cost of inventory.
Sold Last 12	The quantity of items in the category and cost range sold within the last 12 months. The quantity is broken down by turnover time: fast seller, interim seller, and those that took over 540 days to sell.
In Stock Now	The quantity of items in the category in stock. This broken down into the quantity that has been on hand for 30/90/180 days plus what is considered Interim and more than 540 days.

In the example shown above, category 650, Silver Jewelry Misc in the cost range of $25-$50 had 145 items that were fast sellers. More of this type of seller would be a good investment. Selecting values in the **Sold Last 12** columns will bring up the list containing the items that make up the quantity value for that column.

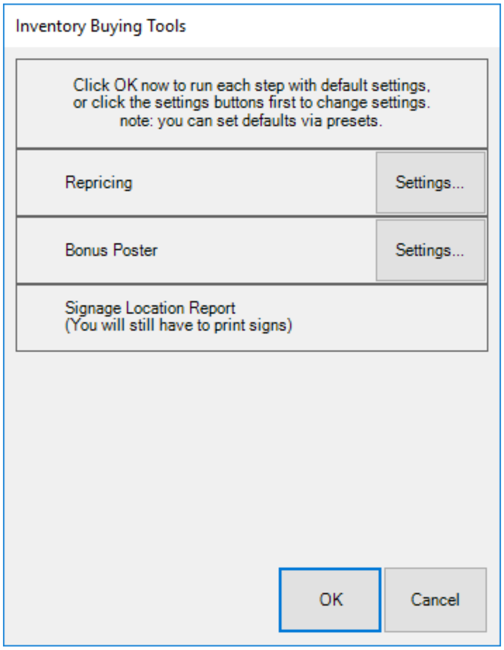
Of course, the report is a suggestion and investment of recovered money is entirely up to you. There are, obviously, investment opportunities outside of the scope of The Edge software.

This is a streamlined version of the **Recovered Cost of Aged Items Report**, which is found in the **Report** menu. For more about that report, see the section entitled Recovered Cost of Aged Items Report.

3.8.2.2 Monthly Aged Inventory Management

To run **Monthly Aged Inventory Management**:

1. Select **Inventory ► Buying Tools**.
2. Select **Monthly Aged Inventory Management. Monthly Aged Inventory Management** includes:
    a. **Repricing**. This step performs automated repricing based on markdown settings in category records.
    b. **Bonus Poster** generation. This step is used to generate a bonus poster showing all items that have a spiff assigned. See the section entitled Bonus Poster for more information.
    c. **Signage Location** report. This is a simple report that will list current in-case signs by case location. For more about working with signs, see the section entitled Sign Formats and the section entitled Printing Signage.



Inventory Buying Tools

Click OK now to run each step with default settings,
or click the settings buttons first to change settings.
note: you can set defaults via presets.

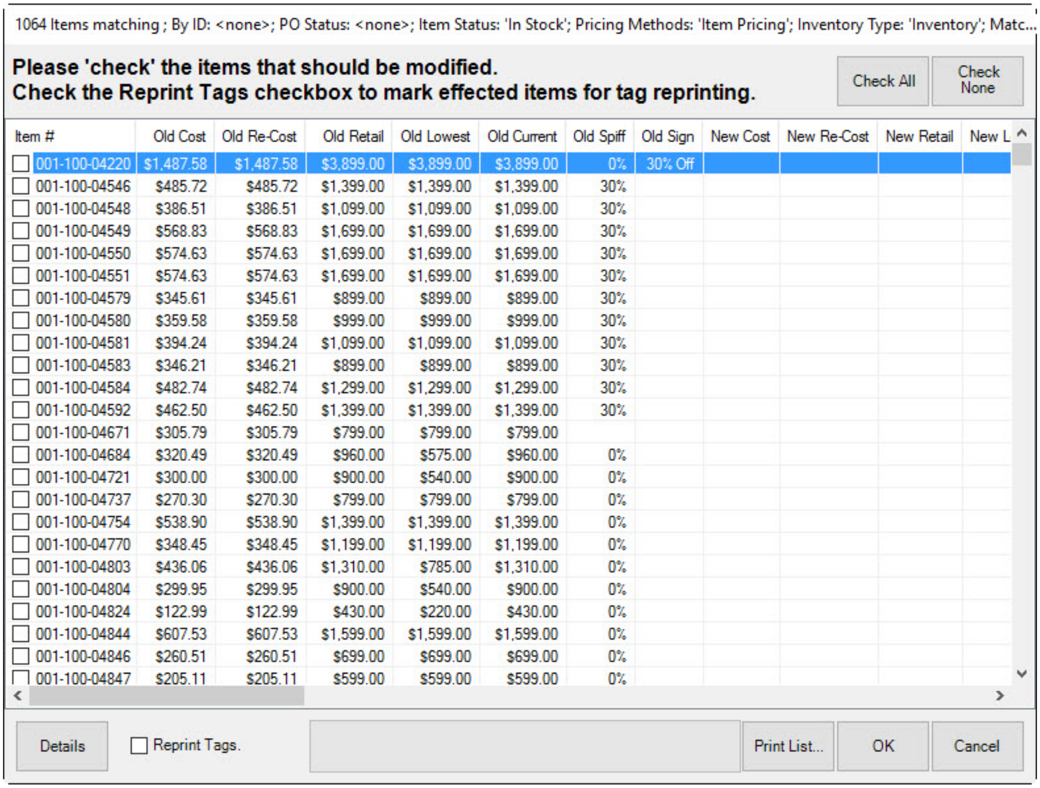
3. Select **OK**. Each buying tool step run will generate output in separate windows that are accessible from the tabs across the bottom of the window. Work with results as follows.

To save this setup permanently, click Presets ► Set as Default.

Repricing

Before you run AIMS Repricing Tools, understand that it will reprice items based on the Automatic Mark Down settings in each category record. There is no undo.

The output for this step is the exception; it does not appear in a tab at the bottom of the window; it will appear in a **Repricing Preview** window that will pop up while the tool is running.



1064 Items matching ; By ID: <none>; PO Status: <none>; Item Status: 'In Stock'; Pricing Methods: 'Item Pricing'; Inventory Type: 'Inventory'; Matc...

Please 'check' the items that should be modified.
Check the Reprint Tags checkbox to mark effected items for tag reprinting.

Item #	Old Cost	Old Re-Cost	Old Retail	Old Lowest	Old Current	Old Spiff	Old Sign	New Cost	New Re-Cost	New Retail	New L
☐ 001-100-04220	$1,487.58	$1,487.58	$3,899.00	$3,899.00	$3,899.00	0%	30% Off				
☐ 001-100-04546	$485.72	$485.72	$1,399.00	$1,399.00	$1,399.00	30%					
☐ 001-100-04548	$386.51	$386.51	$1,099.00	$1,099.00	$1,099.00	30%					
☐ 001-100-04549	$568.83	$568.83	$1,699.00	$1,699.00	$1,699.00	30%					
☐ 001-100-04550	$574.63	$574.63	$1,699.00	$1,699.00	$1,699.00	30%					
☐ 001-100-04551	$574.63	$574.63	$1,699.00	$1,699.00	$1,699.00	30%					
☐ 001-100-04579	$345.61	$345.61	$899.00	$899.00	$899.00	30%					
☐ 001-100-04580	$359.58	$359.58	$999.00	$999.00	$999.00	30%					
☐ 001-100-04581	$394.24	$394.24	$1,099.00	$1,099.00	$1,099.00	30%					
☐ 001-100-04583	$346.21	$346.21	$899.00	$899.00	$899.00	30%					
☐ 001-100-04584	$482.74	$482.74	$1,299.00	$1,299.00	$1,299.00	30%					
☐ 001-100-04592	$462.50	$462.50	$1,399.00	$1,399.00	$1,399.00	30%					
☐ 001-100-04671	$305.79	$305.79	$799.00	$799.00	$799.00						
☐ 001-100-04684	$320.49	$320.49	$960.00	$575.00	$960.00	0%					
☐ 001-100-04721	$300.00	$300.00	$900.00	$540.00	$900.00	0%					
☐ 001-100-04737	$270.30	$270.30	$799.00	$799.00	$799.00	0%					
☐ 001-100-04754	$538.90	$538.90	$1,399.00	$1,399.00	$1,399.00	0%					
☐ 001-100-04770	$348.45	$348.45	$1,199.00	$1,199.00	$1,199.00	0%					
☐ 001-100-04803	$436.06	$436.06	$1,310.00	$785.00	$1,310.00	0%					
☐ 001-100-04804	$299.95	$299.95	$900.00	$540.00	$900.00	0%					
☐ 001-100-04824	$122.99	$122.99	$430.00	$220.00	$430.00	0%					
☐ 001-100-04844	$607.53	$607.53	$1,599.00	$1,599.00	$1,599.00	0%					
☐ 001-100-04846	$260.51	$260.51	$699.00	$699.00	$699.00	0%					
☐ 001-100-04847	$205.11	$205.11	$599.00	$599.00	$599.00	0%					

☐ Reprint Tags.

This window shows items that qualified for repricing based on the category automatic mark down tables. Each item is shown alongside its pertinent details. Also included is the old and new pricing information. Check those items to proceed with repricing and select **OK**.

Bonus Poster

The output for this step is the **Bonus Poster**. This is a poster that shows items that currently have spiff assigned. It also shows the potential bonus commission an associate can earn for selling this item. See the section entitled Bonus Poster for more information.

Signage Location Report

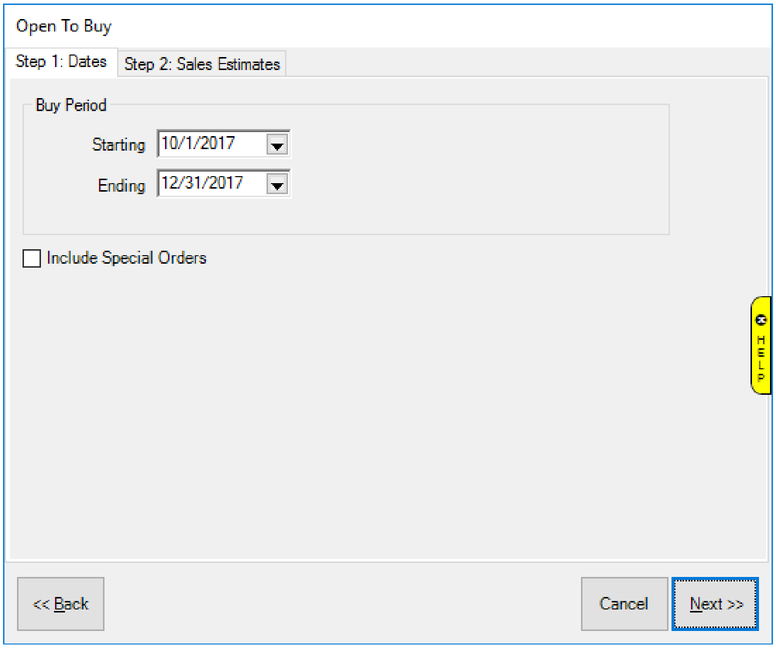
The output for this step is the **Sign Locations** report. This is a report that shows each item with in-case signage assigned to it. The report is grouped by case location. See the section entitled Sign Locations for more information.

3.8.3 Open to Buy

The **Open to Buy** wizard is far more than a report. It creates an entire purchasing schedule for non-bulk inventory for a store for an upcoming sales period based on past data, sales estimates, amount of inventory in stock, and inventory on order.

Open to Buy requires a few steps for inputting data required. Begin by selecting **Inventory ► Open to Buy**. After completing the fields in each step, select **Next**. To change data in an earlier step, select **Back**.

Step 1: Dates



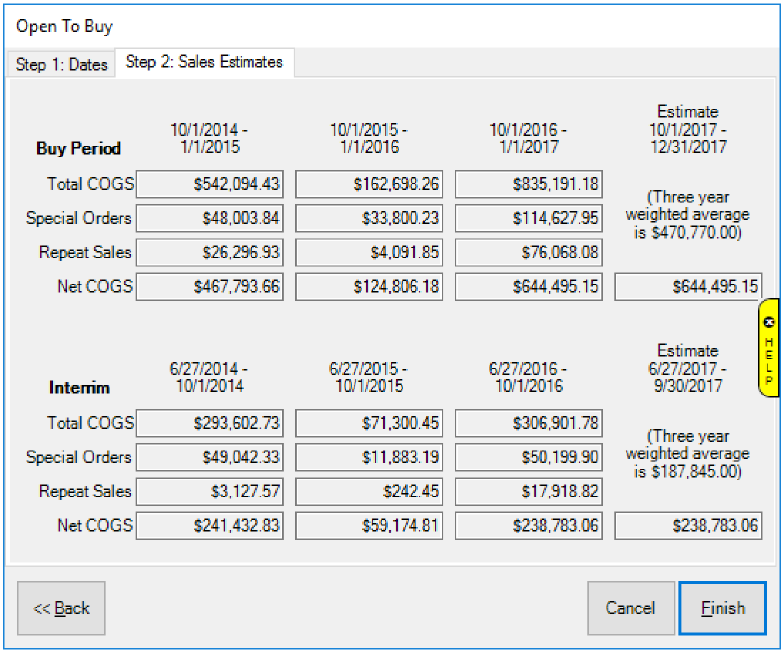
Starting 10/1/2017

Ending 12/31/2017

☐ Include Special Orders

Starting	List the starting date for the proposed buy period. This date must be in the future.
Ending	List the ending date for the proposed buy period. This date must be in the future.
Include Special Orders	Whether to include special order data in the output.

Step 2: Sales Estimates



Open To Buy

Buy Period	10/1/2014 - 1/1/2015	10/1/2015 - 1/1/2016	10/1/2016 - 1/1/2017	Estimate 10/1/2017 - 12/31/2017
Total COGS	$542,094.43	$162,698.26	$835,191.18	(Three year weighted average is $470,770.00)
Special Orders	$48,003.84	$33,800.23	$114,627.95	
Repeat Sales	$26,296.93	$4,091.85	$76,068.08	
Net COGS	$467,793.66	$124,806.18	$644,495.15	$644,495.15

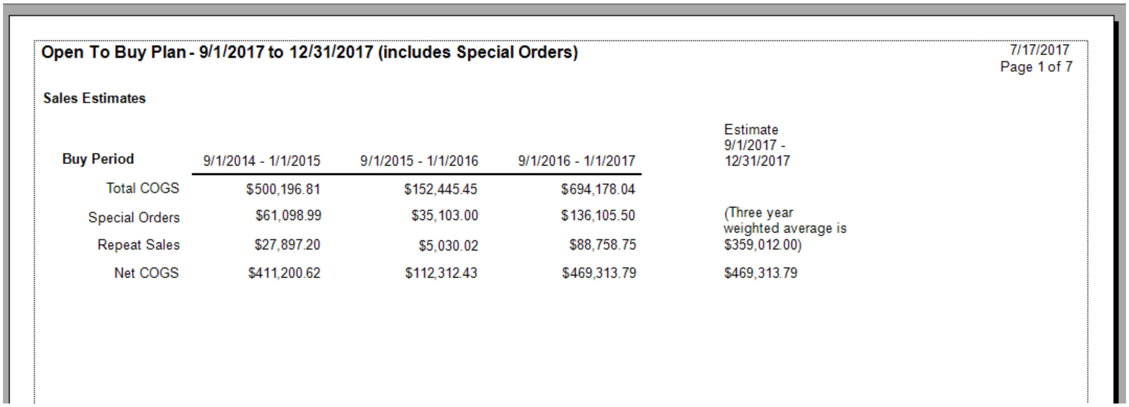
Interim	6/27/2014 - 10/1/2014	6/27/2015 - 10/1/2015	6/27/2016 - 10/1/2016	Estimate 6/27/2017 - 9/30/2017
Total COGS	$293,602.73	$71,300.45	$306,901.78	(Three year weighted average is $187,845.00)
Special Orders	$49,042.33	$11,883.19	$50,199.90	
Repeat Sales	$3,127.57	$242.45	$17,918.82	
Net COGS	$241,432.83	$59,174.81	$238,783.06	$238,783.06

Buy Period	Lists the time periods entered in step 1 but for previous years' sales.
Total COGS	The total cost of goods sold for the listed period for previous years' sales.
Special Orders	The total COGS from special orders for previous years' sales.
Repeat Sales	The total COGS from repeat sales for previous years' sales.
Net COGS	The net cost of goods sold for previous years' sales.
(COGS) Sales (estimate)	The Edge's predictions, excluding special orders and repeat sales. The default value will be weighted according to the previous three years of buying periods.
Interim	The time period between today and the start of the target period but for previous years.
Total COGS	The total cost of goods sold for the listed period but for previous years.
Special Orders	The total COGS from special orders but for previous years.
Repeat Sales	The total of COGS from repeat sales but for previous years.
Net COGS	The net cost of goods sold but for previous years.
Estimate	The Edge's summary of what to spend, excluding special orders and repeat sales. The default value will be weighted according to the previous three years of buying periods.

To generate the report, select **Finish**.

Results Page 1

Page one reiterates the input values for reference.



Open To Buy Plan - 9/1/2017 to 12/31/2017 (includes Special Orders)

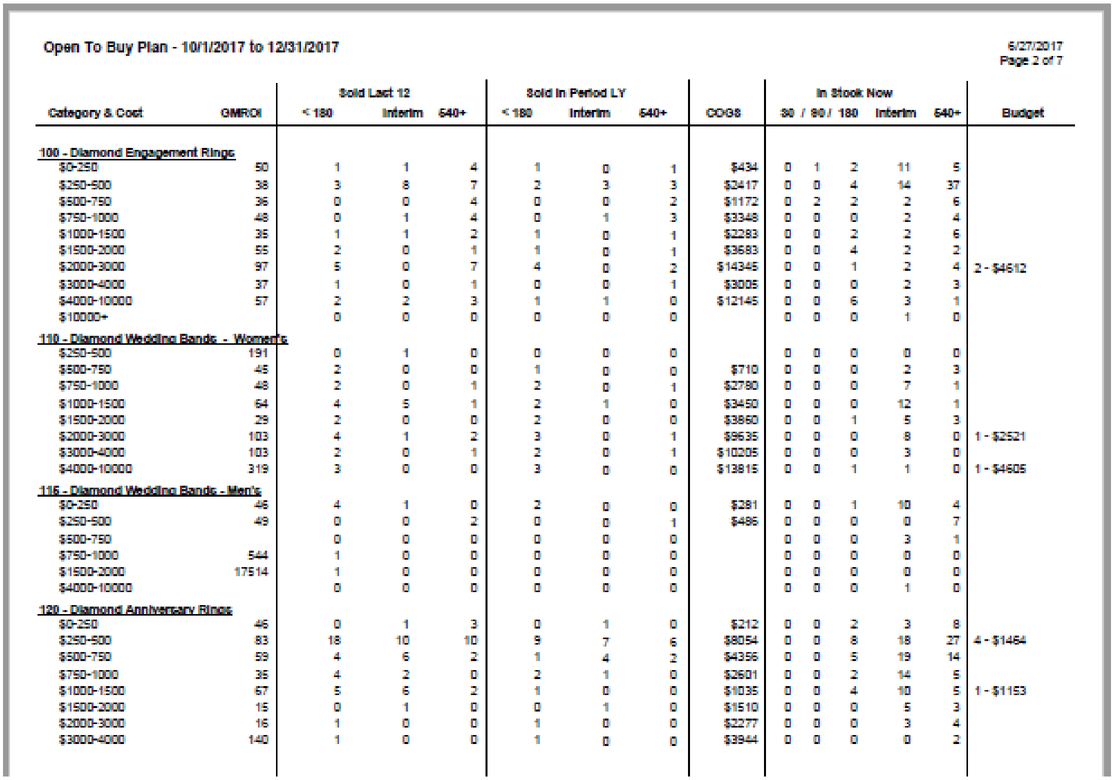
7/17/2017
Page 1 of 7

Sales Estimates

Buy Period	9/1/2014 - 1/1/2015	9/1/2015 - 1/1/2016	9/1/2016 - 1/1/2017	Estimate 9/1/2017 - 12/31/2017
Total COGS	$500,196.81	$152,445.45	$694,178.04	
Special Orders	$61,098.99	$35,103.00	$136,105.50	(Three year weighted average is $359,012.00)
Repeat Sales	$27,897.20	$5,030.02	$88,758.75	
Net COGS	$411,200.62	$112,312.43	$469,313.79	$469,313.79

Results Page 2

The remainder of the output shows the results which will show what you sold, what you have, and what you might want to spend on replacement inventory.



Open To Buy Plan - 10/1/2017 to 12/31/2017

6/27/2017
Page 2 of 7

Category & Cost	GMROI	Sold Last 12			Sold In Period LY			COGS	In Stock Now					Budget
		< 180	Interim	540+	< 180	Interim	540+		30 /	90 /	180	Interim	540+	
100 - Diamond Engagement Rings														
$0-250	50	1	1	4	1	0	1	$434	0	1	2	11	5	
$250-500	38	3	8	7	2	3	3	$2417	0	0	4	14	37	
$500-750	36	0	0	4	0	0	2	$1172	0	2	2	2	6	
$750-1000	48	0	1	4	0	1	3	$3348	0	0	0	2	4	
$1000-1500	35	1	1	2	1	0	1	$2283	0	0	2	2	6	
$1500-2000	55	2	0	1	1	0	1	$3683	0	0	4	2	2	
$2000-3000	97	5	0	7	4	0	2	$14345	0	0	1	2	4	2 - $4612
$3000-4000	37	1	0	1	0	0	1	$3005	0	0	0	2	3	
$4000-10000	57	2	2	3	1	1	0	$12145	0	0	6	3	1	
$10000+		0	0	0	0	0	0		0	0	0	1	0	
110 - Diamond Wedding Bands - Women's														
$250-500	191	0	1	0	0	0	0		0	0	0	0	0	
$500-750	45	2	0	0	1	0	0	$710	0	0	0	2	3	
$750-1000	48	2	0	1	2	0	1	$2780	0	0	0	7	1	
$1000-1500	64	4	5	1	2	1	0	$3450	0	0	0	12	1	
$1500-2000	29	2	0	0	2	0	0	$3860	0	0	1	5	3	
$2000-3000	103	4	1	2	3	0	1	$9635	0	0	0	8	0	1 - $2521
$3000-4000	103	2	0	1	2	0	1	$10205	0	0	0	3	0	
$4000-10000	319	3	0	0	3	0	0	$13815	0	0	1	1	0	1 - $4605
116 - Diamond Wedding Bands - Men's														
$0-250	46	4	1	0	2	0	0	$281	0	0	1	10	4	
$250-500	49	0	0	2	0	0	1	$486	0	0	0	0	7	
$500-750		0	0	0	0	0	0		0	0	0	3	1	
$750-1000	544	1	0	0	0	0	0		0	0	0	0	0	
$1500-2000	17514	1	0	0	0	0	0		0	0	0	0	0	
$4000-10000		0	0	0	0	0	0		0	0	0	1	0	
120 - Diamond Anniversary Rings														
$0-250	46	0	1	3	0	1	0	$212	0	0	2	3	8	
$250-500	83	18	10	10	9	7	6	$8054	0	0	8	18	27	4 - $1464
$500-750	59	4	6	2	1	4	2	$4356	0	0	5	19	14	
$750-1000	35	4	2	0	2	1	0	$2601	0	0	2	14	5	
$1000-1500	67	5	6	2	1	0	0	$1035	0	0	4	10	5	1 - $1153
$1500-2000	15	0	1	0	0	1	0	$1510	0	0	0	5	3	
$2000-3000	16	1	0	0	1	0	0	$2277	0	0	0	3	4	
$3000-4000	140	1	0	0	1	0	0	$3944	0	0	0	0	2	

The buying plan analyzes your inventory purchases and successful selling in previous years to offer suggested changes to the upcoming buying season. These changes amount to the OTB distribution of funds into different categories and price points. For example, a category with a $10,000 investment may contain $5,000 worth of stock at a price point that sells rapidly in your store. The remaining $5,000 may be in a price point that is moving very slowing, or not at all. Based on past history, it may be determined that you do need items in this price point, just fewer than before.

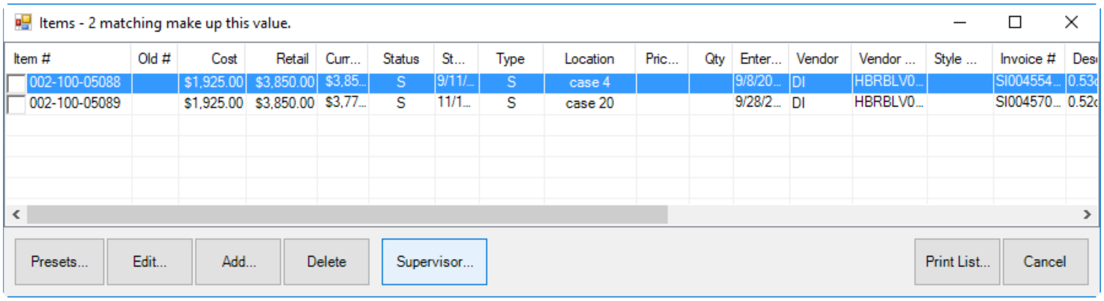
The Edge has an overriding rule that indicates that no matter how well a particular price point performed, we will never recommend that you buy so much that the new in-stock level exceeds two times the amount sold in the previous 365 days.

Data fields shown in the **Open to Buy** report include:

Category & Cost	The category and cost range being presented.
GMROI	The gross margin return on investment. The formula used to calculate this is profit divided by the cost of inventory.

Sold Last 12	The quantity of items in the category and cost range sold within the last 12 months. The quantity is broken down by turnover time: fast seller (less than 180 days), interim seller (180 days to 540 days), and those that took over 540 days to sell.
Sold In Period LY	The quantity of items in the category and cost range sold one year prior to the Buy Period as specified in step 1 on the UI screen. The quantity is broken down by turnover time: fast seller (less than 180 days), interim seller (180 days to 540 days), and those that took over 540 days to sell.
COGS	Total cost of goods sold for each category/cost range for the Sold In Period LY quantities.
In Stock Now	The quantity of items in the category/cost range in stock. This is broken down into quantities that have been on hand for less than 30/90/180 days, interim (180 days to 540 days), and more than 540 days.
Budget	Recommended quantity of each of items to buy and the total cost of those items for each category/cost range.

For all of the quantity numbers in the sections **Sold Last 12**, **Sold in Period LY**, **In Stock Now**, you can click on the value and a list of those items that make up that number will appear. That will give you even better insight into what kinds of items are yielding those results.



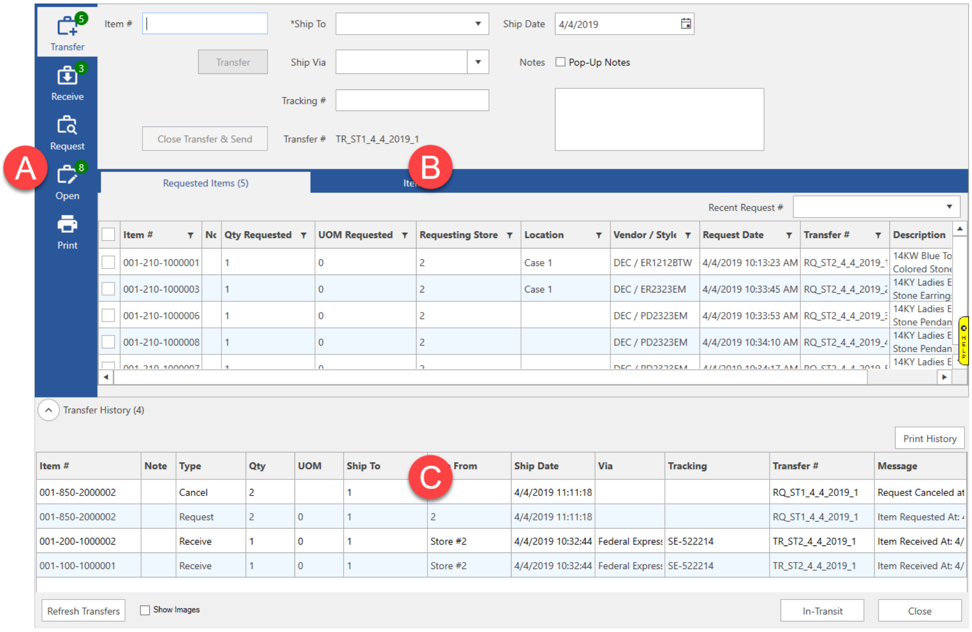
Items - 2 matching make up this value.

Item #	Old #	Cost	Retail	Curr...	Status	St...	Type	Location	Pric...	Qty	Enter...	Vendor	Vendor ...	Style ...	Invoice #	Des
☐ 002-100-05088		$1,925.00	$3,850.00	$3,85...	S	9/11/...	S	case 4			9/8/20...	DI	HBRBLV0...		SI004554...	0.53
☐ 002-100-05089		$1,925.00	$3,850.00	$3,77...	S	11/1...	S	case 20			9/28/2...	DI	HBRBLV0...		SI004570...	0.52

3.9 Inter-Store

3.9.1 Overview

To open the **Transfer Screen**, click **Inventory > Inter-Store > Transfers**.



Item #

*Ship To

Ship Date 4/4/2019

Ship Via

Notes ☐ Pop-Up Notes

Tracking #

Transfer # TR_ST1_4_4_2019_1

Recent Request #

☐	Item #	Nc	Qty Requested	UOM Requested	Requesting Store	Location	Vendor / Style	Request Date	Transfer #	Description
☐	001-210-1000001		1	0	2	Case 1	DEC / ER1212BTW	4/4/2019 10:13:23 AM	RQ_ST2_4_4_2019_1	14KW Blue To Colored Stone
☐	001-210-1000003		1	0	2	Case 1	DEC / ER2323EM	4/4/2019 10:33:45 AM	RQ_ST2_4_4_2019_2	14KY Ladies E Stone Earring
☐	001-210-1000006		1	0	2		DEC / PD2323EM	4/4/2019 10:33:53 AM	RQ_ST2_4_4_2019_3	14KY Ladies E Stone Pendan
☐	001-210-1000008		1	0	2		DEC / PD2323EM	4/4/2019 10:34:10 AM	RQ_ST2_4_4_2019_4	14KY Ladies E Stone Pendan

Transfer History (4)

Item #	Note	Type	Qty	UOM	Ship To	From	Ship Date	Via	Tracking	Transfer #	Message
001-850-2000002		Cancel	2		1		4/4/2019 11:11:18			RQ_ST1_4_4_2019_1	Request Canceled at
001-850-2000002		Request	2	0	1	2	4/4/2019 11:11:18			RQ_ST1_4_4_2019_1	Item Requested At:
001-200-1000002		Receive	1	0	1	Store #2	4/4/2019 10:32:44	Federal Express	SE-522214	TR_ST2_4_4_2019_1	Item Received At: 4/
001-100-1000001		Receive	1	0	1	Store #2	4/4/2019 10:32:44	Federal Express	SE-522214	TR_ST2_4_4_2019_1	Item Received At: 4/

*The form automatically refreshes every 5 minutes but can be manually refreshed using the **Refresh Transfers** button.*

The **Transfer Screen** is divided into three sections.

A There are 5 tabs. These control what is displayed in area B. The number in the green circle indicates how many pending items are on that tab.

Transfer	Allows you to transfer items to other stores.
Receive	Allows you to receive items transferred to your store.
Request	Allows you to request items from other stores.
Open	Shows all open transfers; can be used to cancel a transfer.
Print	Allows you to print a transfer slip showing all items included on a specific transfer.

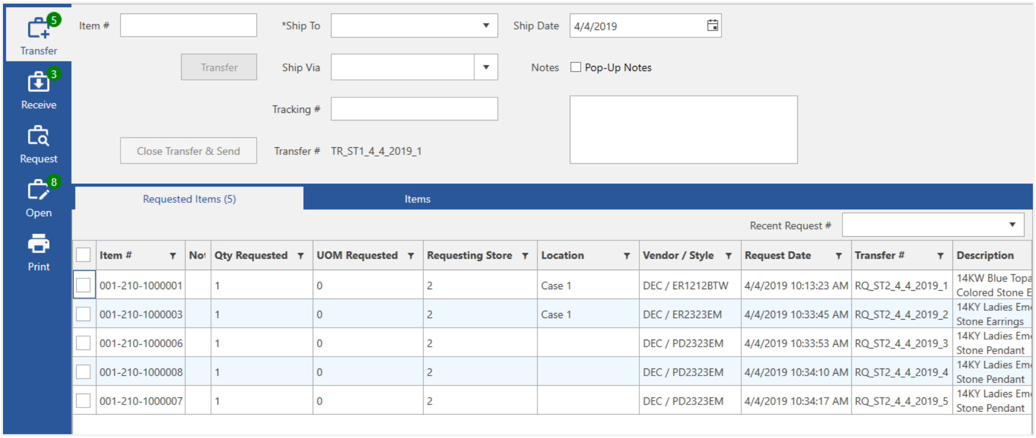
B This form corresponds to the currently selected tab. Fields and options will vary depending on which tab is selected. See the next sections for specific information on each tab.

C	This is a running log of transfer history for the current session. Closing the Transfer Screen will end the session and clear the log.

NOTE: Double clicking on a transferred item in any of the Transfer tabs will open the item record.

3.9.1.1 *Transfer Tab*

This tab opens a form allowing you to transfer items to other stores. It will also display items requested from your store for easy fulfillment. This form is divided into top and bottom sections.



Ship Date 4/4/2019

Transfer # TR_ST1_4_4_2019_1

☐	Item #	No	Qty Requested	UOM Requested	Requesting Store	Location	Vendor / Style	Request Date	Transfer #	Description
☐	001-210-1000001		1	0	2	Case 1	DEC / ER1212BTW	4/4/2019 10:13:23 AM	RQ_ST2_4_4_2019_1	14KW Blue Topa Colored Stone E
☐	001-210-1000003		1	0	2	Case 1	DEC / ER2323EM	4/4/2019 10:33:45 AM	RQ_ST2_4_4_2019_2	14KY Ladies Em Stone Earrings
☐	001-210-1000006		1	0	2		DEC / PD2323EM	4/4/2019 10:33:53 AM	RQ_ST2_4_4_2019_3	14KY Ladies Em Stone Pendant
☐	001-210-1000008		1	0	2		DEC / PD2323EM	4/4/2019 10:34:10 AM	RQ_ST2_4_4_2019_4	14KY Ladies Em Stone Pendant
☐	001-210-1000007		1	0	2		DEC / PD2323EM	4/4/2019 10:34:17 AM	RQ_ST2_4_4_2019_5	14KY Ladies Em Stone Pendant

The top of this form defines where and how the item is being transferred. Fields and buttons include:

Item #	Scan or manually key in an item to transfer it. You must specify shipping information first (**Ship To** is required, other fields are optional).
Ship To	The store being shipped to.
Ship Date	The date this item is being shipped. It will default to today. Cannot backdate.
Ship Via	The method of shipment for this transfer. List values are derived from the **Shipping Methods** list (Administrative > Lists). This field also accepts text entry.
Notes	Notes to accompany this transferred item. Check the **Pop-up Notes** box if you want the note displayed in a pop-up window when received.
Tracking #	The tracking # for this shipment (user-defined).

Transfer #	The transfer # for this shipment (system generated). After initiating a transfer, all subsequent items will be assigned this same # until you click **Close Transfer & Send.** Format: TR (Transfer) or RQ (Request) _ Store # _ Date _ Sequential digit. E.g. TR_ST1_4_4_2019_1 is a transfer request initiated from store 01 on 4/4/2019 and 1 indicates it is the first transfer that day.
Transfer	Click this button to transfer the currently entered or selected item(s).
Close Transfer & Send	Click this button to close the current transfer shipment. This will increment the **Transfer #**. If notifications are enabled, this will also trigger the email to be sent.

The bottom of this form is divided into two tabs: **Requested Items** and **Items**.

Requested Items show all items requested from your store. The number in parenthesis indicates the number of unfulfilled requests. To fulfill the request and transfer the item to the requestor, check it and click the **Transfer** button. To deny the request, visit the **Open** tab, select the item, and click the **Cancel Transfer** button.

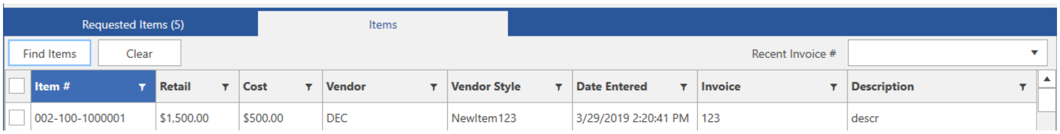
☐	Item #	Not	Qty Requested	UOM Requested	Requesting Store	Location	Vendor / Style	Request Date	Transfer #	Description
☐	001-210-1000003		1	0	2	Case 1	DEC / ER2323EM	4/4/2019 10:33:45 AM	RQ_ST2_4_4_2019_2	14KY Ladies Em Stone Earrings

Fields on the **Requested Items** tab include:

Recent Request #	This drop-down will show open requests. Selecting an open request will filter the item list to only display items from that request.
Item #	The item # of the requested item.
Note	If there is a note on this request a green note icon will be displayed. Hover over the icon to review the note text.
Qty Requested	The quantity requested.
UOM Requested	For bulk, the measure requested.
Requesting Store	The store the request originated.
Location	The case location of the requested item.
Vendor / Style	The vendor & vendor style of the requested item.
Request Date	The date the request was submitted.

Transfer #	The transfer # this requested item is assigned to.
Description	The description of the requested item.

The **Items** tab allows you to search inventory for items that you want to transfer.



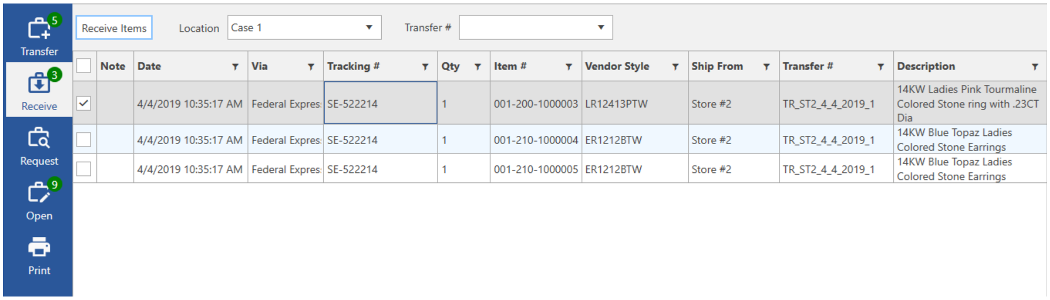
☐	Item #	Retail	Cost	Vendor	Vendor Style	Date Entered	Invoice	Description
☐	002-100-1000001	$1,500.00	$500.00	DEC	NewItem123	3/29/2019 2:20:41 PM	123	descr

Fields and buttons include:

Find Items	Click this button to use the **Item Find** filter to search for inventory. Items matching your criteria will be displayed allowing you to check those you wish to transfer.
Clear	Click this button to clear the item list.
Recent Invoice #	This drop-down will show you recently entered invoices. Selecting an invoice will show all items entered on that invoice. The system option 'Number of Days to Load Invoices' controls how many days back it goes.
Item #	The item #.
Retail	The retail price of the item.
Cost	The cost of the item.
Vendor	The vendor for this item.
Vendor Style	The vendor's style # for this item.
Date Entered	The date this item was entered.
Invoice	The invoice this item was entered on.
Description	The description of this item.

3.9.1.2 Receive Tab

This tab opens a form showing all items transferred to your store that have not yet been received.



Location: Case 1

Transfer #:

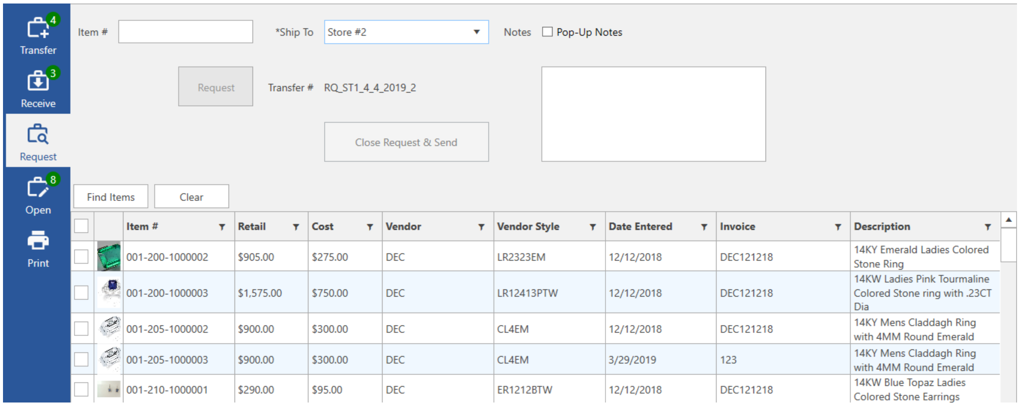
☐	Note	Date	Via	Tracking #	Qty	Item #	Vendor Style	Ship From	Transfer #	Description
☑		4/4/2019 10:35:17 AM	Federal Expres	SE-522214	1	001-200-1000003	LR12413PTW	Store #2	TR_ST2_4_4_2019_1	14KW Ladies Pink Tourmaline Colored Stone ring with .23CT Dia
☐		4/4/2019 10:35:17 AM	Federal Expres	SE-522214	1	001-210-1000004	ER1212BTW	Store #2	TR_ST2_4_4_2019_1	14KW Blue Topaz Ladies Colored Stone Earrings
☐		4/4/2019 10:35:17 AM	Federal Expres	SE-522214	1	001-210-1000005	ER1212BTW	Store #2	TR_ST2_4_4_2019_1	14KW Blue Topaz Ladies Colored Stone Earrings

Fields and buttons include:

Receive Items	Click this to receive the currently checked items.
Location	Use this drop-down to select a case location to receive items into. The system option ‘Receive Items Requires Location’ can be used to make this required.
Transfer #	This drop-down will show open transfers waiting to be received. Selecting an open transfer will filter the list to only display items on that transfer.
Note	If there is a note on this transfer a green note icon will be displayed. Hover over the icon to review the note text.
Date	The date the item was originally transferred.
Via	The shipping method for this item.
Tracking #	The tracking number for this item.
Qty	The quantity of item transferred.
Item #	The item #.
Vendor Style	The item’s vendor style.
Ship From	The store where the item was transferred from.
Transfer #	The transfer # this item is assigned to.
Description	The description of this item.

3.9.1.3 Request Tab

This tab allows you to request items for transfer from other stores. Note that items can also be requested from the **Reorder Form**, **Levels**, and the **Item Record**. See the **Requesting an Item** section for more information.



Item #

*Ship To Store #2

Notes ☐ Pop-Up Notes

Transfer # RQ_ST1_4_4_2019_2

☐		Item #	Retail	Cost	Vendor	Vendor Style	Date Entered	Invoice	Description
☐		001-200-1000002	$905.00	$275.00	DEC	LR2323EM	12/12/2018	DEC121218	14KY Emerald Ladies Colored Stone Ring
☐		001-200-1000003	$1,575.00	$750.00	DEC	LR12413PTW	12/12/2018	DEC121218	14KW Ladies Pink Tourmaline Colored Stone ring with .23CT Dia
☐		001-205-1000002	$900.00	$300.00	DEC	CL4EM	12/12/2018	DEC121218	14KY Mens Claddagh Ring with 4MM Round Emerald
☐		001-205-1000003	$900.00	$300.00	DEC	CL4EM	3/29/2019	123	14KY Mens Claddagh Ring with 4MM Round Emerald
☐		001-210-1000001	$290.00	$95.00	DEC	ER1212BTW	12/12/2018	DEC121218	14KW Blue Topaz Ladies Colored Stone Earrings

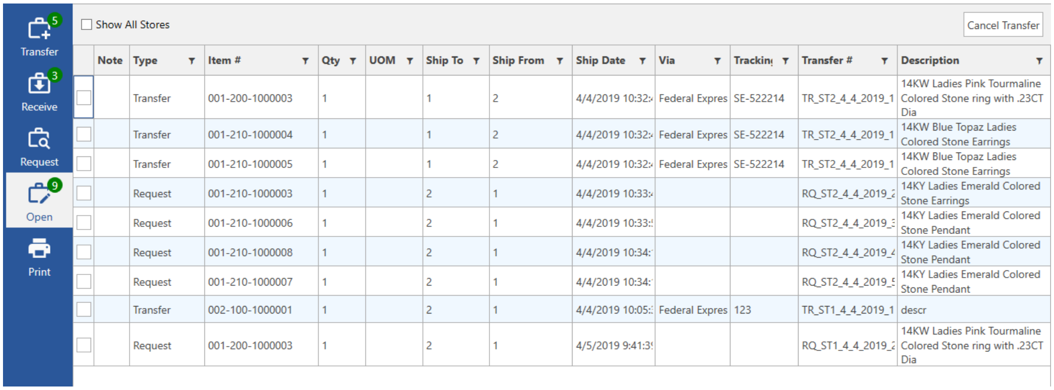
Fields and buttons include:

Item #	Manually key in an item to request it. You must specify **Ship To**.
Ship To	The store being shipped to.
Notes	Notes to accompany this requested item. Check the **Pop-up Notes** box if you want the note displayed in a pop-up window when viewed.
Request	Click this button to request the currently entered or selected item(s).
Close Request & Send	Click this button to close the current request shipment. This will increment the **Transfer #**. If notifications are enabled, this will also trigger the email to be sent.
Transfer #	The transfer # for this shipment (system generated). After initiating a request, all subsequent items will be assigned this same # until you click **Close Request & Send.** Format: TR (Transfer) or RQ (Request) _ Store # _ Date _ Sequential digit. E.g. RQ_ST1_4_4_2019_1 is a request initiated from store 01 on 4/4/2019 and 1 indicates it is the first transfer that day.
Find Items	Click this button to use the **Item Find** filter to search for inventory. Items matching your criteria will be displayed allowing you to check those you wish to request.
Clear	Click this button to clear the item list.

Item #	The item #.
Retail	The retail price of the item.
Cost	The cost of the item.
Vendor	The vendor for this item.
Vendor Style	The vendor’s style # for this item.
Date Entered	The date this item was entered.
Invoice	The invoice this item was entered on.
Description	The description of this item.

3.9.1.4 Open Tab

This tab shows all currently open transfers. This form can be used to cancel transferred items.



☐ Show All Stores

	Note	Type	Item #	Qty	UOM	Ship To	Ship From	Ship Date	Via	Tracking	Transfer #	Description
☐		Transfer	001-200-1000003	1		1	2	4/4/2019 10:32:	Federal Expres	SE-522214	TR_ST2_4_4_2019_1	14KW Ladies Pink Tourmaline Colored Stone ring with .23CT Dia
☐		Transfer	001-210-1000004	1		1	2	4/4/2019 10:32:	Federal Expres	SE-522214	TR_ST2_4_4_2019_1	14KW Blue Topaz Ladies Colored Stone Earrings
☐		Transfer	001-210-1000005	1		1	2	4/4/2019 10:32:	Federal Expres	SE-522214	TR_ST2_4_4_2019_1	14KW Blue Topaz Ladies Colored Stone Earrings
☐		Request	001-210-1000003	1		2	1	4/4/2019 10:33:			RQ_ST2_4_4_2019_	14KY Ladies Emerald Colored Stone Earrings
☐		Request	001-210-1000006	1		2	1	4/4/2019 10:33:			RQ_ST2_4_4_2019_	14KY Ladies Emerald Colored Stone Pendant
☐		Request	001-210-1000008	1		2	1	4/4/2019 10:34:			RQ_ST2_4_4_2019_	14KY Ladies Emerald Colored Stone Pendant
☐		Request	001-210-1000007	1		2	1	4/4/2019 10:34:			RQ_ST2_4_4_2019_	14KY Ladies Emerald Colored Stone Pendant
☐		Transfer	002-100-1000001	1		2	1	4/4/2019 10:05:	Federal Expres	123	TR_ST1_4_4_2019_1	descr
☐		Request	001-200-1000003	1		2	1	4/5/2019 9:41:3			RQ_ST1_4_4_2019_	14KW Ladies Pink Tourmaline Colored Stone ring with .23CT Dia

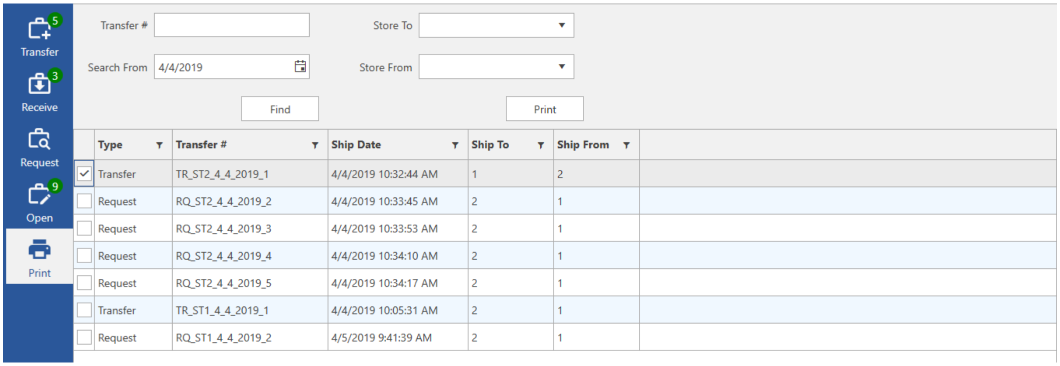
Fields and buttons include:

Show All Stores	By default, only transfers to or from your store are displayed. Check this to see all stores. Requires ‘Transfer Items from Stores other than your current store’ permission.
Cancel Transfer	Cancel the selected item transfer or request.
Note	If there is a note on this transfer a green note icon will be displayed. Hover over the icon to review the note text.
Type	Specifies whether this is a transfer or request.
Item #	The item #.
Qty	The quantity of item transferred or requested.

UOM	For bulk, the measure of item transferred or requested.
Ship To	The destination store for this transfer or request.
Ship From	The originating store for this transfer or request.
Ship Date	The date the item was shipped.
Via	The method of shipping.
Tracking #	The tracking # for this item.
Transfer #	The transfer # this item is assigned to.
Description	The description of the item.

3.9.1.5 Print Tab

This tab is used to print transfers. Each printed transfer will show shipping information as well as a list of all included items.



Transfer #

Store To

Search From 4/4/2019

Store From

	Type	Transfer #	Ship Date	Ship To	Ship From
☑	Transfer	TR_ST2_4_4_2019_1	4/4/2019 10:32:44 AM	1	2
☐	Request	RQ_ST2_4_4_2019_2	4/4/2019 10:33:45 AM	2	1
☐	Request	RQ_ST2_4_4_2019_3	4/4/2019 10:33:53 AM	2	1
☐	Request	RQ_ST2_4_4_2019_4	4/4/2019 10:34:10 AM	2	1
☐	Request	RQ_ST2_4_4_2019_5	4/4/2019 10:34:17 AM	2	1
☐	Transfer	TR_ST1_4_4_2019_1	4/4/2019 10:05:31 AM	2	1
☐	Request	RQ_ST1_4_4_2019_2	4/5/2019 9:41:39 AM	2	1

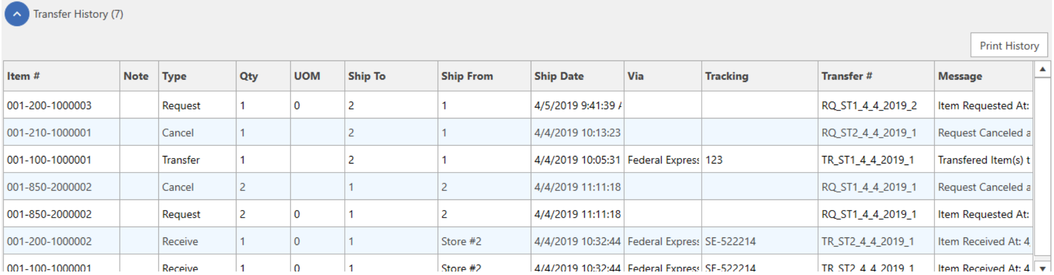
Fields and buttons include:

Transfer #	Enter a transfer # and click **Find** to search for it.
Store To	Choose a store # to filter **Find** results by store being shipped to.
Search From	Choose a date to filter **Find** results by shipped date.
Store From	Choose a store # to filter **Find** results by store being shipped from.
Find	After entering criteria, click this button to find matching transfers.
Print	After selecting a transfer, click this button to open the print preview.
Type	Specifies whether this is a transfer or request.
Transfer #	The transfer #.
Ship Date	The date this transfer was shipped.
Ship To	The destination store for this transfer or request.

Ship From	The originating store for this transfer or request.

3.9.1.6 Transfer History

Transfer history keeps a running log of all transfer activity during this session. Closing the Transfer Screen will end the session and clear the log.



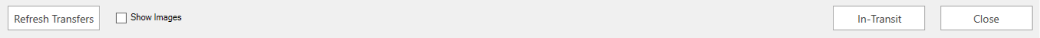
Item #	Note	Type	Qty	UOM	Ship To	Ship From	Ship Date	Via	Tracking	Transfer #	Message
001-200-1000003		Request	1	0	2	1	4/5/2019 9:41:39 /			RQ_ST1_4_4_2019_2	Item Requested At:
001-210-1000001		Cancel	1		2	1	4/4/2019 10:13:23			RQ_ST2_4_4_2019_1	Request Canceled a
001-100-1000001		Transfer	1		2	1	4/4/2019 10:05:31	Federal Express	123	TR_ST1_4_4_2019_1	Transfered Item(s) t
001-850-2000002		Cancel	2		1	2	4/4/2019 11:11:18			RQ_ST1_4_4_2019_1	Request Canceled a
001-850-2000002		Request	2	0	1	2	4/4/2019 11:11:18			RQ_ST1_4_4_2019_1	Item Requested At:
001-200-1000002		Receive	1	0	1	Store #2	4/4/2019 10:32:44	Federal Express	SE-522214	TR_ST2_4_4_2019_1	Item Received At: 4
001-100-1000001		Receive	1	0	1	Store #2	4/4/2019 10:32:44	Federal Express	SE-522214	TR_ST2_4_4_2019_1	Item Received At: 4

Fields and buttons include:

⌃	Click this button to hide or reveal the history log. This can be useful if you require more working area in the top of the form.
Print History	Click this button to print out the current history.
Item #	The item #.
Note	If there is a note on this transfer a green note icon will be displayed. Hover over the icon to review the note text.
Type	Specifies whether this is a transfer or request.
Qty	The quantity of item transferred or requested.
UOM	For bulk, the measure of item transferred or requested.
Ship To	The destination store for this transfer or request.
Ship From	The originating store for this transfer or request.
Ship Date	The date the item was shipped.
Via	The method of shipping.
Tracking #	The tracking # for this item.
Transfer #	The transfer # this item is assigned to.
Message	Describes the action taken on this transfer.

3.9.1.7 Other Options

The bottom of the Transfer Screen includes other options and buttons that apply universally to all tabs.



Refresh Transfers	Refreshes entire Transfer Screen form. Note that the screens automatically refresh every five minutes.
Show Images	Check this to show images in the transfer grids.
In-Transit	Click this to view the In-Transit report.

3.9.2 How To

3.9.2.1 Transfer an Item

To transfer an item:

1. Click **Inventory > Inter-Store > Transfers**. The **Transfer Screen** will open.
2. If you are not already on the **Transfer** tab, click on it on the left.
3. Specify the store to **Ship To**, optionally enter other shipping info or notes, then either:
    a. Scan the item.
    b. Manually key in the item and press enter or click **Transfer** button.
    c. Use the **Items** tab to find and select one or more items, then click the **Transfer** button.
4. Repeat for all items to be included with this shipment.
5. Click **Close Transfer & Send** to complete this shipment.

3.9.2.2 Receive an Item

To receive an item that was transferred to you store:

1. Click **Inventory** > **Inter-Store** > **Transfers.** The **Transfer Screen** will open.
2. On the left, click on the **Receive** tab. A list of items shipped to your store will be displayed. Optionally, use the **Transfer #** drop-down to filter by a specific shipment #.
3. Optionally, specify case location to receive items into. The system option ‘Receive Items Requires Location’ can be used to make this required.
4. Check one or more items, then click the **Receive Items** button. Alternatively, you can scan the item barcodes.

3.9.2.3 Request an Item

There are four ways to request items from other stores.
From Transfer Screen

1. Click **Inventory** > **Inter-Store** > **Transfers.**
2. On the left, click on the **Request** tab.
3. Specify the store to **Ship To**. Optionally, enter notes, then either:
    a. Manually key in the item and press enter or click the **Request** button.

   b. Use the **Find Items** button to find and select one or more items, then click the **Request** button.
4. Repeat for all items to be included with this request.
5. Click **Close Request & Send** to complete this request.

From Reorder Form

1. Run the **Reorder Form** either as part of **Weekly Buying Tools** (**Inventory > Buying Tools > Weekly Buying Plan**) or standalone (**Reports > Inventory > Ordering > Reorder Form**).
2. When running, you must change the **Display Rows** option to **Show One Style Per Store**.
3. Use the drop-down at the beginning of the row to expand the style row to show individual counts by store.
4. Check the store you wish to request from, then click **Request Items** button at the bottom.

From Item Record

1. Click **Inventory > Items > Find** and enter criteria to search for the item.
2. **Edit** the item record.
3. Click the **Request** button (located in the Inventory section, middle of form). Note that this button will only be visible if the item is not already at your store.

From Levels

1. Click **Inventory > Items > Levels** and enter criteria to search for styles.
2. Use the drop-down at the beginning of the row to expand the style row to show individual counts by store.
3. Click the **Request** button next to the store you wish to request from.

3.9.2.4 Cancel a Transferred or Requested Item

To cancel a transferred or requested item:

1. Click **Inventory > Inter-Store > Transfers.**
2. On the left, click on the **Open** tab.
3. Select the item then click the **Cancel Transfer** button in the top right.

3.9.2.5 Print a Transfer

To print a transfer:

1. Click **Inventory > Inter-Store > Transfers**.
2. On the left, click on the **Print** tab.
3. Use the fields at the top to specify criteria, then click **Find**. A list of matching transfers will be shown.

4. Select the transfer and click the **Print** button.

3.9.2.6 Enable Email Notifications

Email notifications can be setup so that designated associates get automatically notified when a transfer or request is sent to their store. To use this feature, you must first setup email notifications. See the Email Setup webpage for instructions on doing so (varies by email provider).
To enable notifications for an associate:

1. Click **Administrative > Associates** and **Edit** the associate record.
2. Under **Multi-Store Options** on the right, click the **Receive Transfer Notifications** drop-down.
3. Check one or more stores, then click **OK**.
4. Verify the associate has an **Email** on file.
5. Save your changes.

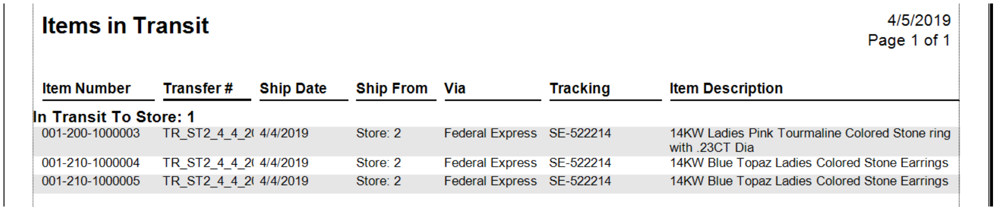
3.9.3 Reports

There are two transfer reports available.

3.9.3.1 In Transit Report

This report will show all open transfers. To run:

1. Click **Inventory > Inter-Store > In Transit Report**.
2. There are no options to set; the report will automatically run and display all open transfers.



Items in Transit

4/5/2019
Page 1 of 1

Item Number	Transfer #	Ship Date	Ship From	Via	Tracking	Item Description
In Transit To Store: 1						
001-200-1000003	TR_ST2_4_4_2	4/4/2019	Store: 2	Federal Express	SE-522214	14KW Ladies Pink Tourmaline Colored Stone ring with .23CT Dia
001-210-1000004	TR_ST2_4_4_2	4/4/2019	Store: 2	Federal Express	SE-522214	14KW Blue Topaz Ladies Colored Stone Earrings
001-210-1000005	TR_ST2_4_4_2	4/4/2019	Store: 2	Federal Express	SE-522214	14KW Blue Topaz Ladies Colored Stone Earrings

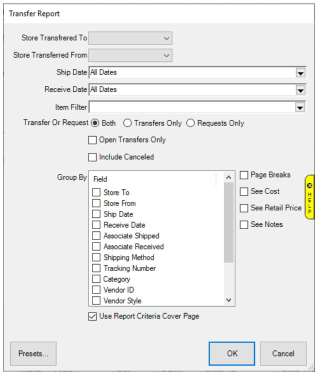
Fields on this report include:

Item Number	The item #.
Transfer #	The transfer #.
Ship Date	The date this item was transferred.
Ship From	The originating store for this transferred item.
Via	The shipping method.
Tracking	The tracking #.
Item Description	The description of the item.

3.9.3.2 Transfer Report

This report allows you to specify criteria and can be used to report on open, closed, and cancelled transfers. To run:

1. Click **Inventory > Inter-Store > Transfer Report**. The **Transfer Report** window will appear.

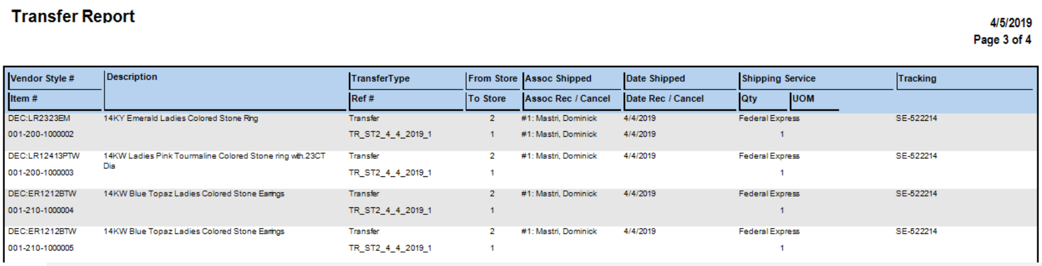


Ship Date: All Dates
Receive Date: All Dates
Transfer Or Request: ● Both ○ Transfers Only ○ Requests Only
☐ Open Transfers Only
☐ Include Canceled
☐ Store To
☐ Store From
☐ Ship Date
☐ Receive Date
☐ Associate Shipped
☐ Associate Received
☐ Shipping Method
☐ Tracking Number
☐ Category
☐ Vendor ID
☐ Vendor Style
☐ Page Breaks
☐ See Cost
☐ See Retail Price
☐ See Notes
☑ Use Report Criteria Cover Page

Fields and options include:

Store Transferred To	Allows you to select destination store
Store Transferred From	Allows you to select originating store
Ship Date	Allows you to select by shipped date
Receive Date	Allows you to select by received date
Item Filter	Opens item filter allowing you to set specific item criteria to search for
Transfer or Request	Choose whether to display transfers, requests, or both
Open Transfers Only	Check this to only include open transfers
Include Canceled	Check to also include canceled transfers
Group By	Check options to group by them. Drag & drop items to the top of the list to sort by them.
Page Breaks	Check to include page breaks.
See Cost	Check to include cost.
See Retail Price	Check to include retail price.
See Notes	Check to include notes.
Use Report Criteria Page	Check to include the report criteria page

2. Set desired criteria and click **OK**.
3. The resulting report will show each transferred item meeting your criteria.



Transfer Report

4/5/2019
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Vendor Style #	Description	TransferType	From Store	Assoc Shipped	Date Shipped	Shipping Service		Tracking
Item #		Ref #	To Store	Assoc Rec / Cancel	Date Rec / Cancel	Qty	UOM	
DEC:LR2323EM	14KY Emerald Ladies Colored Stone Ring	Transfer	2	#1: Mastri, Dominick	4/4/2019	Federal Express		SE-522214
001-200-1000002		TR_ST2_4_4_2019_1	1	#1: Mastri, Dominick	4/4/2019	1		
DEC:LR12413PTW	14KW Ladies Pink Tourmaline Colored Stone ring wth.23CT Dia	Transfer	2	#1: Mastri, Dominick	4/4/2019	Federal Express		SE-522214
001-200-1000003		TR_ST2_4_4_2019_1	1			1		
DEC:ER1212BTW	14KW Blue Topaz Ladies Colored Stone Earrings	Transfer	2	#1: Mastri, Dominick	4/4/2019	Federal Express		SE-522214
001-210-1000004		TR_ST2_4_4_2019_1	1			1		
DEC:ER1212BTW	14KW Blue Topaz Ladies Colored Stone Earrings	Transfer	2	#1: Mastri, Dominick	4/4/2019	Federal Express		SE-522214
001-210-1000005		TR_ST2_4_4_2019_1	1			1		

Vendor Style	The item's vendor style number.
Item #	The item #.
Description	The description of the item.
Transfer Type	Whether this is a transfer or request.
Ref #	The transfer #.
From Store	The originating store.
To Store	The destination store.
Assoc Shipped	The associate that transferred the item.
Assoc Rec/Cancel	The associate that received or canceled the transfer.
Date Shipped	The date the transfer was shipped.
Date Rec/Cancel	The date the transfer was received or canceled.
Shipping Service	The shipping type.
Qty / UOM	For bulk, the shipped quantity.
Tracking	The shipping tracking #.

3.9.4 Settings and Security

3.9.4.1 System Options

To view the **Transfer** system options, click **Administrative > System Options** and scroll down to the **Transfer Options** section.

Number of Days to Load Invoices	Defines how many days back to load invoices into the Invoice drop-down in the Transfer screen; default is 7 which will load invoices from the last 7 days.
Receive Items Requires Location	Set to True to require a case location when receiving transferred items.
Transfer Emails	Set to True to enable transfer notification emails.

3.9.4.2 Permissions

To view associate permissions, click **Administrative > Associates** and **Edit** the associate record. The following permissions pertain to transfers:

Ship Items Inter-Store	Allows you to ship items from your store to other stores
Receive Items Inter-Store	Allows you to receive items shipped to your store
Request an Item to be transferred from another store	Allows you to request items from other stores
Transfer Items from Stores other than your current store	Allows you to transfer items between any stores, not just your own
Cancel a Transfer or Request	Allows you to cancel a transfer or request
Run Transfer Report	Allows you to run the transfer report

4 Managing Your Customer Base

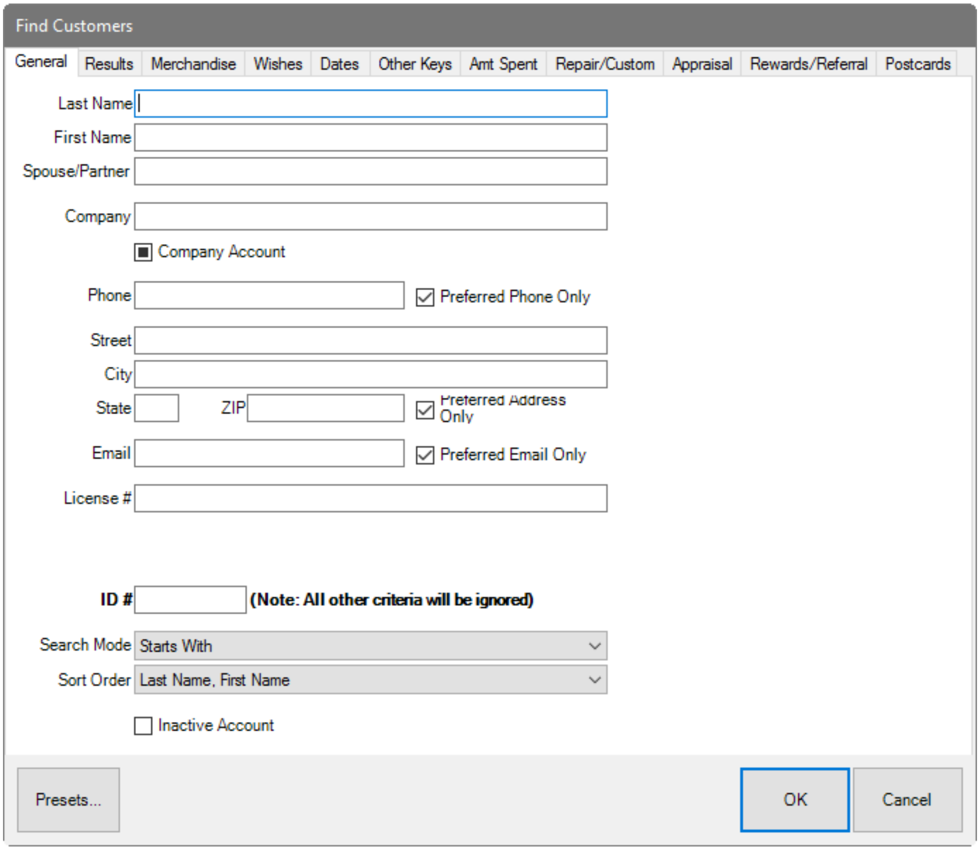
The **Customer** area of The Edge allows you to keep track of one of the most important aspects of your business: your client base. From this menu, you can access information about specific customers, add information about new customers, create mailing lists, export records, print statements, or find gift certificates.

4.1 Finding a Customer

You can use the customer find filter for a number of functions within The Edge: to work with customer records, for reporting, to make customer contact, and so on. For a video tutorial about working with customer filters, go to http://www.screencast.com/t/MkdH1e7iQmqR.

To find an existing customer in The Edge's database:

1. Select **Customer ► Find**. The **Find Customers** window will appear with the **General** tab selected. As always, the **Presets** feature allows you to save search parameters for future use. See the section entitled Presets for more information.



■ Company Account

☑ Preferred Phone Only

☑ Preferred Address Only

☑ Preferred Email Only

ID # (Note: All other criteria will be ignored)

Search Mode: Starts With

Sort Order: Last Name, First Name

☐ Inactive Account

- **For Name and all fields in The Edge search windows, entering no information will return the entire customer database.**
- **These parameters are cumulative. That is, the more parameters you enter, the fewer items will be returned. For example, if you enter a last name and an amount spent, only items with matches in BOTH fields will be returned. This applies to parameters on all the tabs.**

Entering, for example, `Sm` in the Last Name field will return any customer whose last name begins with Sm, such as Smith or Smedley.

Fields and options in the **General** tab include:

Last Name	Returns customers with matching last names.
First Name	Returns customers with matching first names.
Spouse/Partner	Returns customers with matching spouse’s or partner’s name.

Company	Returns customers with matching company accounts.
Company Account	Returns customers with company accounts. If you leave this option unchecked, you will get personal accounts only. If you select this option, you will get company accounts. If you select it again, you will get both personal and company accounts. This state is indicated by a gray checkmark as opposed to black. Note that selecting this will change the available fields in the window.
Phone	Returns customers with matching phone numbers.
Preferred Phone Only	Returns customers with matching preferred phone numbers only.
Street	Returns customers with matching street addresses.
City	Returns customers living in the entered city.
State	Returns customers living in the entered state.
Zip	Returns customers living in the entered zip code.
Preferred Address Only	Returns customers with matching preferred addresses only.
Email	Returns customers with matching email addresses.
Preferred Email Only	Returns customers with matching preferred email addresses only.
License #	Returns customers with a matching driver's license number.
ID#	Returns customers with a matching ID number. Because this information is so specific, all other search criteria will be ignored.
Search Mode	Contains options for data inclusion.

Starts With	Returns records whose fields start with the entered letters.
Contains	Returns customers who have any matches in any portion of the field, not just the beginning.
Ends With	Returns records whose fields end with something.
Exact Match Only	Returns only records whose fields exactly match the entry.

For example, if you have a customer whose name is Doug and you remember that his phone number ended in 5555, you could enter that parameter and select **Contains** from the **Search Mode** drop-down list to get records with those matches.

Sort Order	Contains options for how results are to be presented.

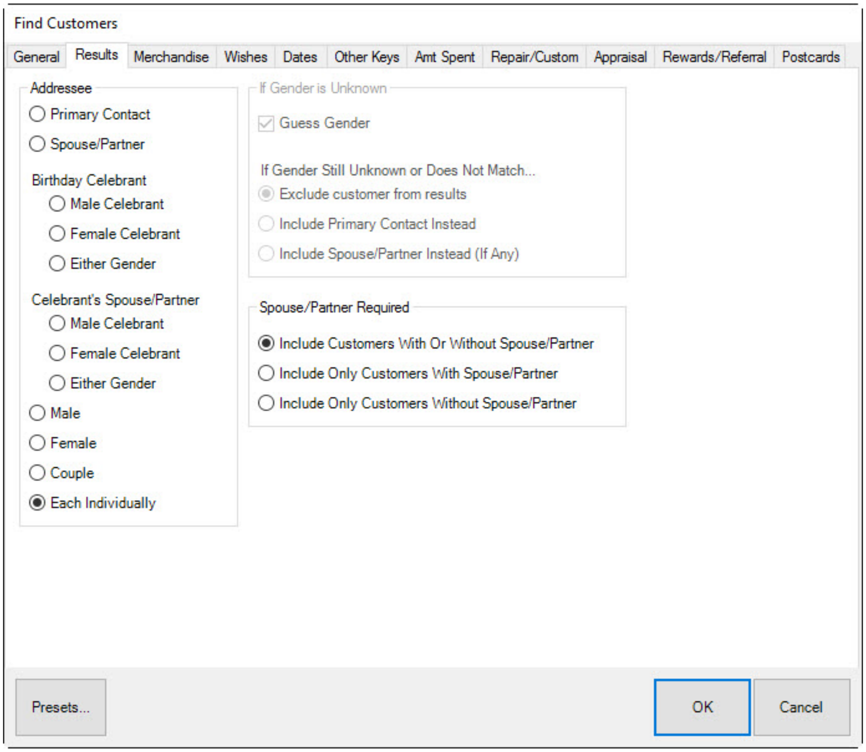
Inactive Account	Searches inactive account lists. This option contains three states: • Unchecked searches only active accounts. • Checked searches only inactive accounts. • Unchecked again searches for both. Note it will contain a gray checkmark.

By default, a customer find will return ALL customer contact information. This means that if a customer has three addresses on file, this information will appear on three rows in the resulting customer list. This does not indicate three separate customer records, as they will all show the same customer number. Use the Primary Address/Phone Only options in the Customer Find filter if you do not wish to see this secondary contact information. Keep in mind that if no primary contact information exists for a customer, they will be excluded from the resulting list. Because the options are cumulative, if you checked both primary address and primary phone only options, and a customer only had a primary address but not a phone, that customer would be excluded.

2. Complete the **General** tab fields as needed, if any, to retrieve the appropriate data.

Typing `=any` **into any of the fields will return only results with some data in that specified field. Typing** `=none` **will return only customers where that field is empty.**

3. Select the **Results** tab if needed.



Addressee
○ Primary Contact
○ Spouse/Partner
Birthday Celebrant
  ○ Male Celebrant
  ○ Female Celebrant
  ○ Either Gender
Celebrant's Spouse/Partner
  ○ Male Celebrant
  ○ Female Celebrant
  ○ Either Gender
○ Male
○ Female
○ Couple
● Each Individually

If Gender is Unknown
☑ Guess Gender
If Gender Still Unknown or Does Not Match...
● Exclude customer from results
○ Include Primary Contact Instead
○ Include Spouse/Partner Instead (If Any)

Spouse/Partner Required
● Include Customers With Or Without Spouse/Partner
○ Include Only Customers With Spouse/Partner
○ Include Only Customers Without Spouse/Partner

The **Results** tab defines how to search and display matching customers. It is a powerful filter by which to specify whom to include. For example, under **Addressee**, you can narrow the results to include spouses/partners or just the individual. Or you can use it to return only the spouse/partner. Specific options include:

Addressee

Primary Contact	Records will be labeled with the primary account holder's contact information.
Spouse/Partner	Records will be labeled with the spouse/partner's contact information.
Birthday Celebrant	Returns the name of the birthday celebrant regardless of whether they are the primary contact or spouse on the customer record.
Celebrant's Spouse/Partner	Returns the spouse of the birthday celebrant regardless of whether they are the primary contact or spouse on the customer record.
Male	Returns only male customers.
Female	Returns only female customers.

Couple	Returns records with data matching either party and returns them as a couple in one record. Transactions using a record from these results will be assigned to the primary ID. The name on the receipt and other documents will be shown as a couple.
Each Individually	Returns records matching any information in any record regardless of whether it is primary or the spouse/partner. Transactions using a record from these results will be assigned to the individual's ID.

If Gender is unknown

Guess Gender	Instructs The Edge to guess the gender based on customer's name if no gender is on file.

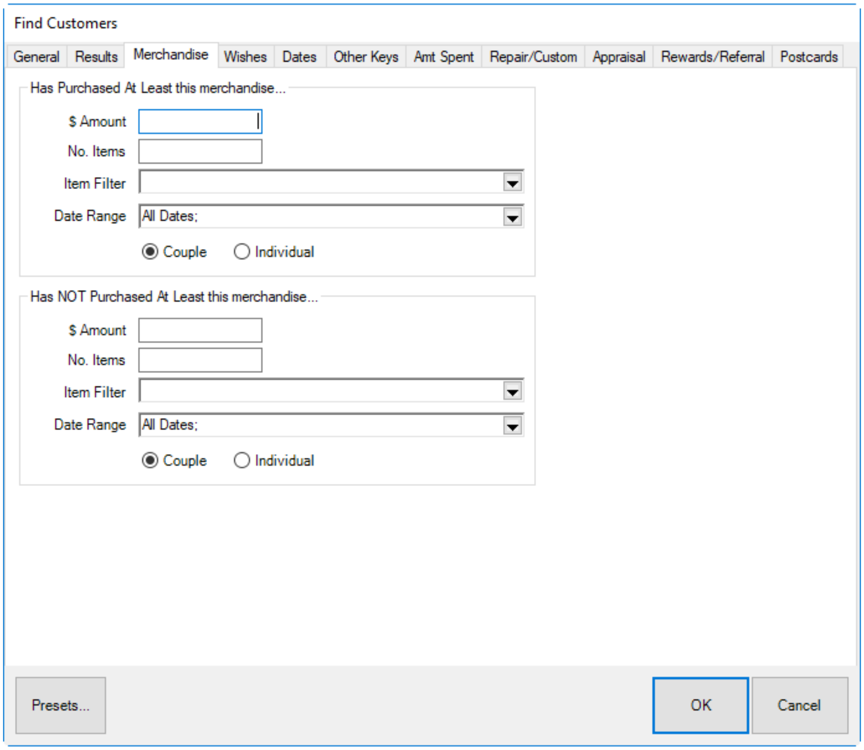
If Gender is still unknown

Exclude customer from results	Instructs The Edge to exclude customers whose gender cannot be determined.
Include primary contact instead	Instructs The Edge to include the primary contact on a customer record if the gender cannot be determined on either the primary contact or their spouse, regardless of **Addressee** options.
Include Spouse/Partner instead (if any)	Instructs The Edge to include the spouse contact on a customer record if the gender cannot be determined on either the primary contact or their spouse, regardless of **Addressee** options.

Spouse/Partner Required

Include customers with no spouse/partner	Instructs The Edge to include customers with no spouse on file regardless of whether the **Addressee** option is set to only return customer spouse information. The primary contact information will be shown in place of the spouse.
Exclude customers with no spouse/partner	Instructs The Edge to exclude customers with no spouse/partner on file.

4. Select the **Merchandise** tab if needed.



Has Purchased At Least this merchandise...

Date Range All Dates;

● Couple ○ Individual

Has NOT Purchased At Least this merchandise...

Date Range All Dates;

● Couple ○ Individual

The **Merchandise** tab allows you to search for customers based on items they have purchased in the past. Fields and options in the **Merchandise** tab include:

Has Purchased at Least this merchandise

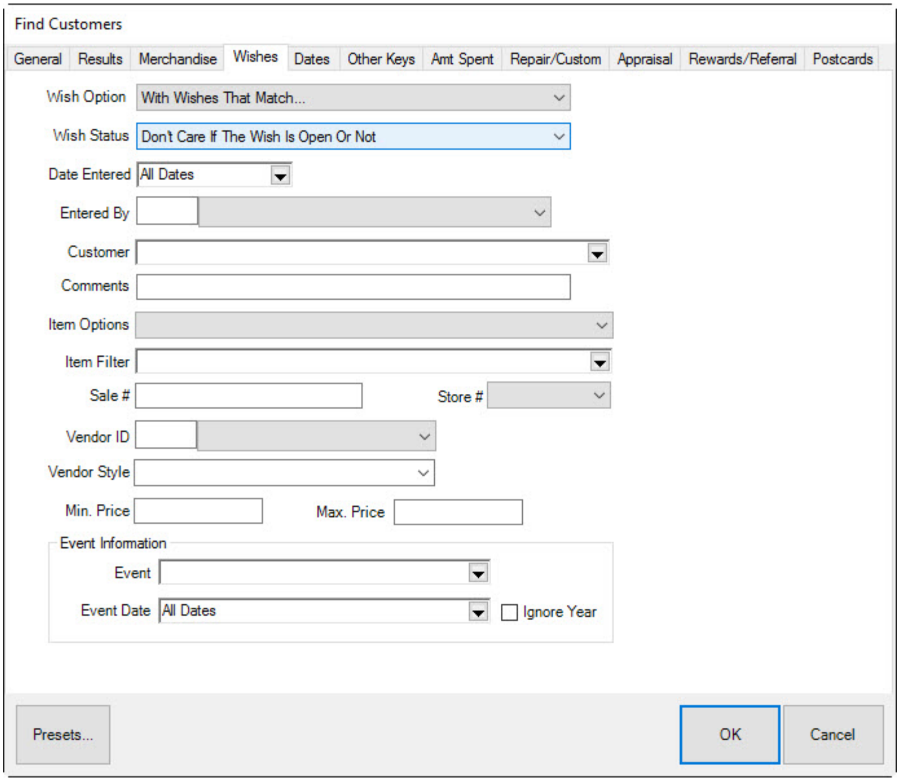
$Amount	Returns customers who have spent at least this amount.
No. Items	Returns customers who have purchased at least this many items.
Item Filter	Returns customers who have purchased items specified in this shortcut to the **Item Find** feature.
Date Range	Returns customers who have made purchases during a specified date range.
Couple	Returns records in which the merchandise purchases of both the customer and spouse/partner are included in the query.
Individual	Returns records in which only the merchandise purchases of the individual customer are included in the query.

Has NOT Purchased at Least this merchandise

$Amount	Returns customers who have not spent at least this amount.
No. Items	Returns customers who have not purchased at least this many items.

Item Filter	Returns customers who have purchased items specified in this shortcut to the **Item Find** feature.
Date Range	Returns customers who have not made purchases during a specified date range.
Couple	Returns records in which the merchandise purchases of both the customer and spouse/partner are included in the query.
Individual	Returns records in which only the merchandise purchases of the individual customer are included in the query.

5. Enter parameters as desired and select the **Wishes** tab.



Wish Option: With Wishes That Match...
Wish Status: Don't Care If The Wish Is Open Or Not
Date Entered: All Dates
Event Date: All Dates

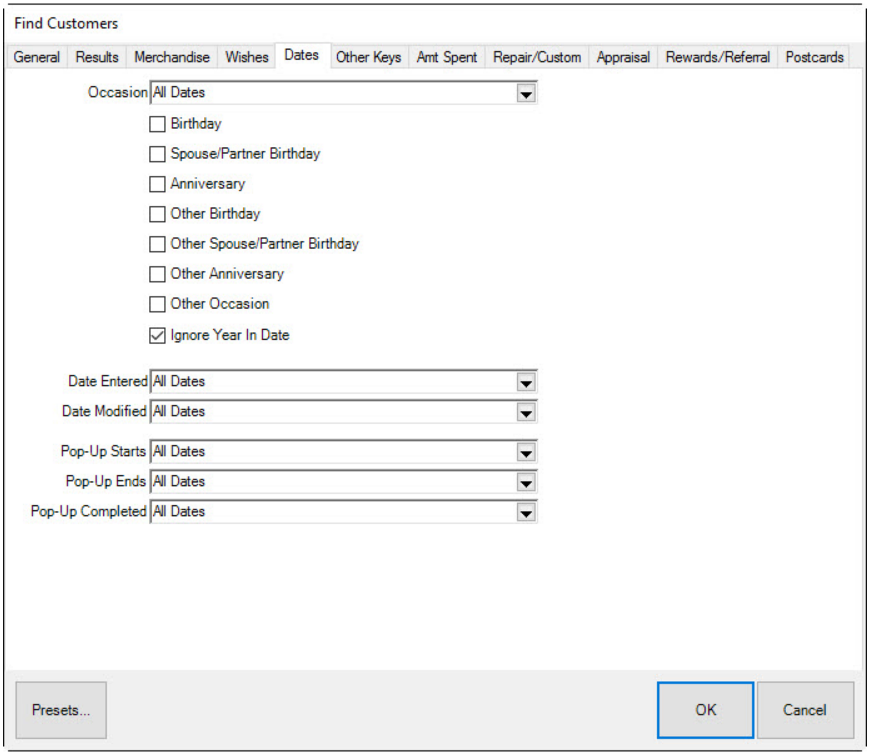
The **Wishes** tab allows you to search for a customer based on items saved in his or her wish list. Fields and options in the **Wishes** tab are two-fold. The first window includes options as follows:

- **Don't care about wishes**
- **Wishes that match…**
- **Wishes that do no match….**

If **Don't care about wishes** is selected, no further action is required for the **Wishes** tab. However, if **Wishes that match** or **Wishes that do not match** is selected, further options will be offered for narrowing the search by the type of wishes saved in the customer's record. Under these circumstances, fields and options offered in the **Wishes** tab for inclusion or exclusion in the search are:

Wish Option	A second opportunity to choose whether these filters are to be included in the results or excluded.
Wish Status	Returns customers whose wishes are open, already bought, or either.
Date Entered	Returns customers whose wishes were entered during a particular time frame.
Wish Entered By	Returns customers with wishes entered by a particular associate.
Customer	Returns customer who have entered wishes for a specified customer such as their spouse, etc.
Comments	Returns customers who have the specified key words in the wish list comments field.
Item Options	Returns customers who have entered wishes containing items that are in inventory, not in inventory, or both.
Item Filter	Returns customers whose wishes match an item as found using the **Item Find** feature.
Sale #	Returns customers who have wishes that were fulfilled using this sale transaction number.
Store #	Returns customers whose wishes were entered at a particular store.
Vendor ID	Returns customer whose wishes match a particular vendor.
Vendor Style	Returns customers whose wishes match a particular vendor style.
Min. Price	Returns customers whose wish list items contain an item of at least this amount.
Max. Price	Returns customers whose wish list items contain an item of less than this amount.
Event	Returns customers whose wish list items are designated for any of the events listed here: Mother's Day, Anniversary, Father's Day, Valentine's Day, Christmas, Birthday, or Other Holiday.
Event Date	Returns customers whose event as selected above falls within the specified date range.

6. Complete the fields in the **Wishes** tab as required ad select the **Dates** tab.



Occasion: All Dates

☐ Birthday
☐ Spouse/Partner Birthday
☐ Anniversary
☐ Other Birthday
☐ Other Spouse/Partner Birthday
☐ Other Anniversary
☐ Other Occasion
☑ Ignore Year In Date

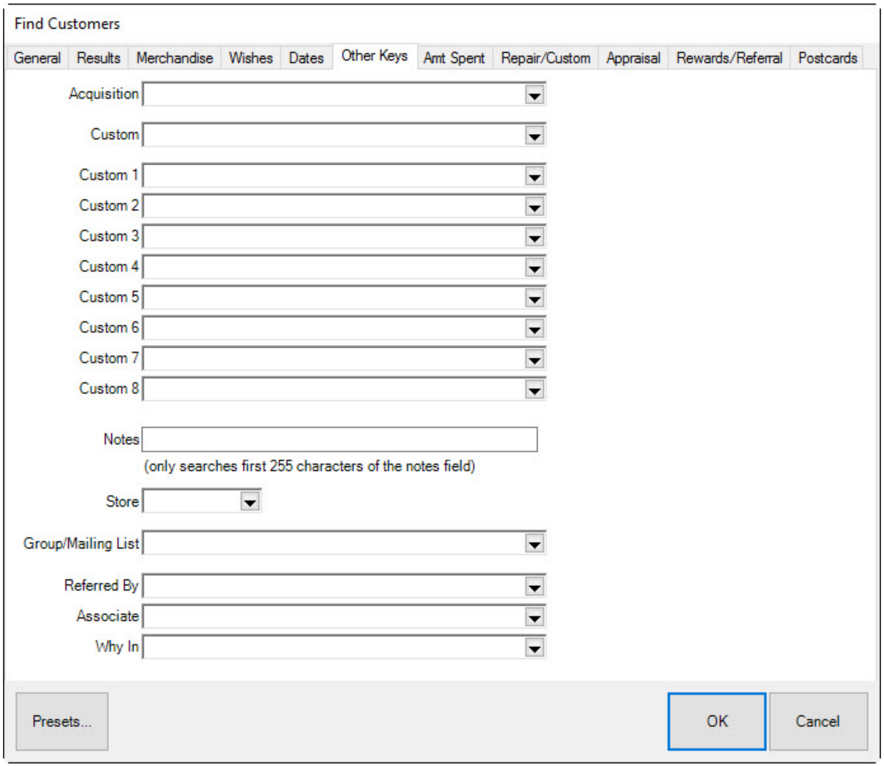
Date Entered: All Dates
Date Modified: All Dates
Pop-Up Starts: All Dates
Pop-Up Ends: All Dates
Pop-Up Completed: All Dates

The **Dates** tab allows you to search for a customer based on special dates in his or her life. Use of the date picker is described in the section entitled Filtering by Date. Fields and options in the **Dates** tab include:

Occasion	Returns customers who have occasions listed in the specified date range.
Birthday	Returns customers by birthday.
Spouse/Partner Birthday	Returns customers by his or her spouse's birthday.
Anniversary	Returns customers by anniversary.
Other Birthday	Returns customers by another birthday.
Other Spouse/Partner Birthday	Returns customers who have a related person with a spouse with a birthday in the specified range.
Other Anniversary	Returns customers by another anniversary.
Other Occasion	Returns customers by another type of occasion.

Ignore Year in Date	This allows you to search for anniversaries on any day and month without specifying the year.
Date Entered	Returns customers by when a customer was entered.
Date Modified	Returns customers by when the customer record was modified.
Pop-up Starts	Returns customers for whom a pop-up is set to start on the specified date.
Pop-up Ends	Returns customers for whom a pop-up is set to end on the specified date.
Pop-up Completed	Returns customers for whom the pop-up activity was completed.

7. Select the **Other Keys** tab if needed.



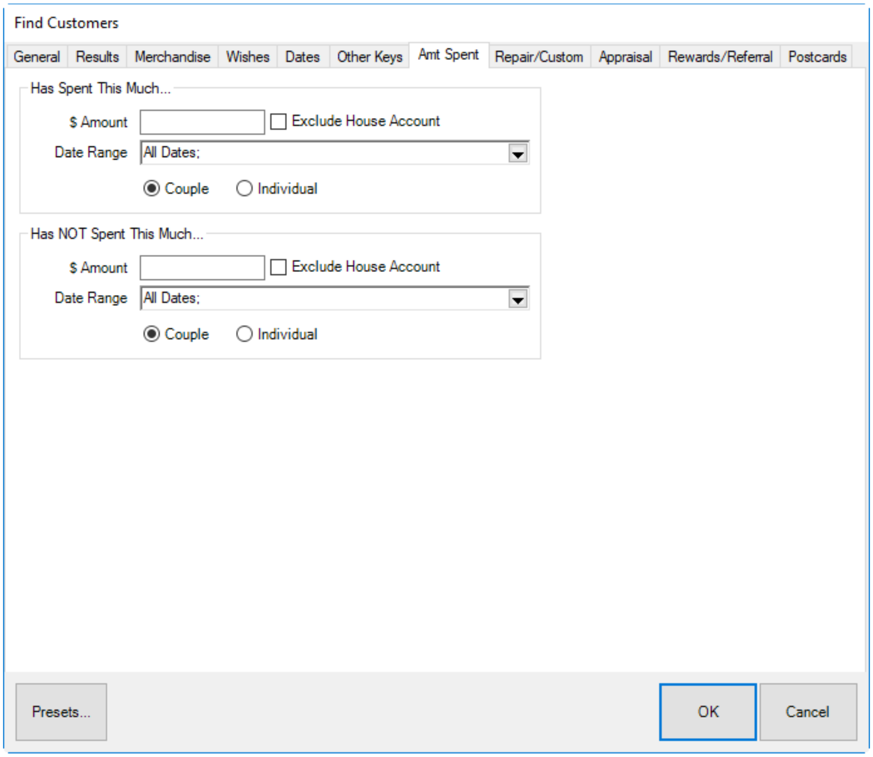
(only searches first 255 characters of the notes field)

Fields and options in the **Other Keys** tab include:

Acquisition	Returns customers based on the response to the **Why In** field on their first purchase.
Custom 1-8	These are store-defined parameters for which the names can be altered in **System Options**. Note that these labels are user-defined.

Notes	Returns customers with specified keywords listed in the notes.
Store	Returns customers who have activity at a specified store.
Group/Mailing List	Returns customers belonging to a particular group or mailing list.
Referred By	Returns customers referred by another, specified customer.
Associate	Returns customers who have been assigned to a particular associate.
Why In	Returns customers whose visit to the store was recorded by a particular Why In? response at POS.

8. Complete the **Other Keys** tab fields as needed, if any, to retrieve the appropriate data.
9. Select the **Amount Spent** tab, if needed.



Has Spent This Much...

$ Amount ☐ Exclude House Account

Date Range All Dates;

● Couple ○ Individual

Has NOT Spent This Much...

$ Amount ☐ Exclude House Account

Date Range All Dates;

● Couple ○ Individual

Fields and options in the **Amount Spent** tab include:

Has Spent This Much

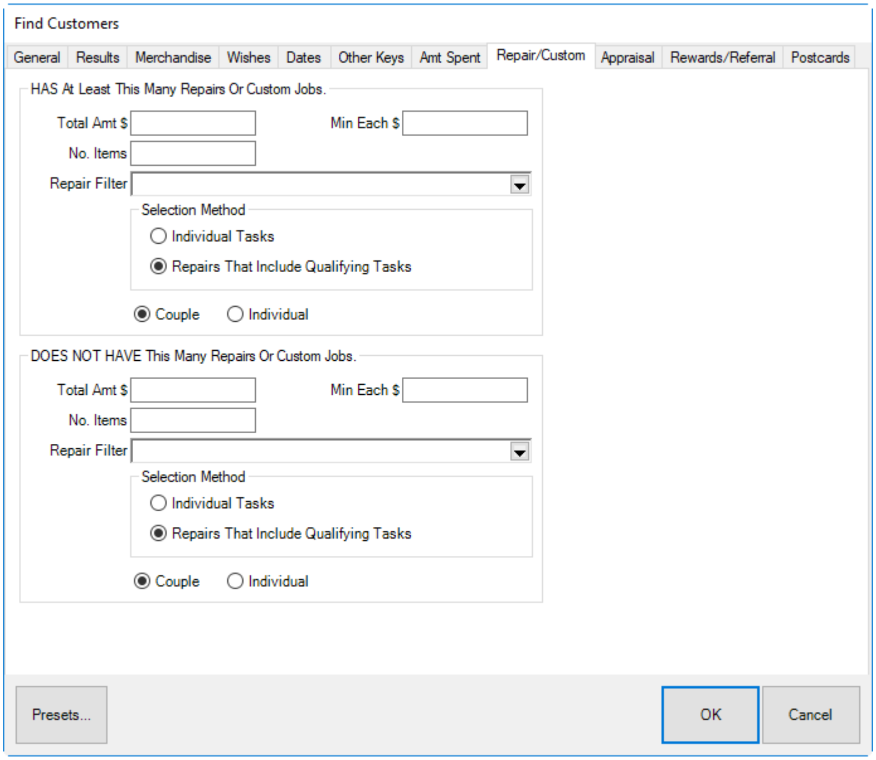
$Amount	Returns customers who have spent the specified amount in any tender form.
Exclude House Account	Excludes store charges from this amount.

Date Range	Includes customers who have spent this amount in the specified date range.
Couple	Returns records in which the purchases of both the customer and spouse/partner are included toward the specified amount.
Individual	Returns records in which only the purchases of the individual customer are included toward the specified amount.

Has NOT Spent This Much

$Amount	Returns customers who have spent less than this amount.
Exclude House Account	Excludes store charges from this amount.
Date Range	Includes customers who have spent less than this amount during the specified date range.
Couple	Returns records in which the purchases of both the customer and spouse/partner are included toward the specified amount.
Individual	Returns records in which only the purchases of the individual customer are included toward the specified amount.

10. Complete the **Amount Spent** tab fields as needed.
11. Select the **Repair/Custom** tab if needed.



HAS At Least This Many Repairs Or Custom Jobs.

○ Individual Tasks
● Repairs That Include Qualifying Tasks
● Couple ○ Individual

DOES NOT HAVE This Many Repairs Or Custom Jobs.

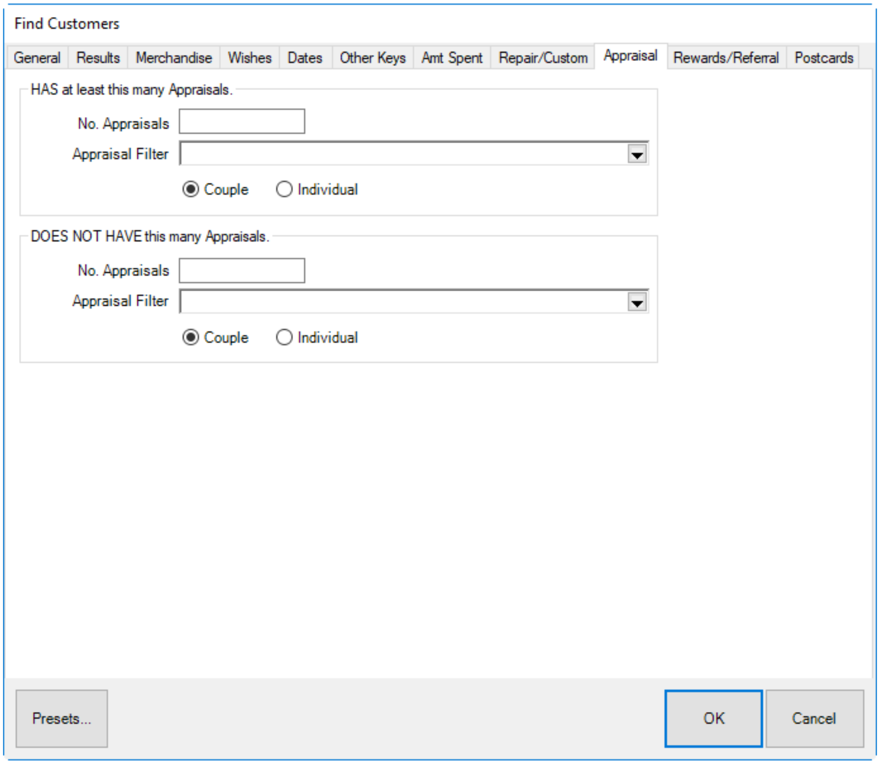
○ Individual Tasks
● Repairs That Include Qualifying Tasks
● Couple ○ Individual

Fields and options in the **Repair/Custom** tab include:

HAS at least this many repairs or custom jobs.	For any of the parameters entered below, the intent is to require that results include records with these values as a minimum.
Total Amt $	Returns records in which the customer has spent at least this amount on repairs or custom jobs in total.
Min Each $	Returns records in which the customer has spent at least this amount on any particular repair or custom job.
No. Items	Returns records in which the customer has had at least this many repairs or custom jobs.
Repair Filter	Allows you to use the **Repair Find** feature to specify repairs to include.
Individual Tasks	Within the repair filter, allows you to narrow those parameters further to apply at the task level.
Repairs That Include Qualifying Tasks	Within the repair filter, allows you to narrow those parameters to specific task SKUs.

Couple	Returns records in which the repair and custom job purchases of both the customer and spouse/partner are included in the query.
Individual	Returns records in which only the repair and custom job purchases of the individual customer are included in the query.
DOES NOT HAVE this many repairs or custom jobs.	For any of the parameters entered below, the intent is to require that results include records with values less than those indicated.
Total Amt $	Excludes records in which the customer has spent at least this amount on repairs or custom jobs in total.
Min Each $	Excludes records in which the customer has spent at least this amount on any particular repair or custom job.
No. Items	Excludes records in which the customer has had at least this many repairs or custom jobs.
Repair Filter	Allows you to use the **Repair Find** feature to specify repairs to exclude.
Individual Tasks	Within the repair filter, allows you to narrow those parameters further to apply at the task level.
Repairs That Include Qualifying Tasks	Within the repair filter, allows you to narrow those parameters to specific task SKUs.
Couple	Returns records in which the repair and custom job purchases of both the customer and spouse/partner are included in the query.
Individual	Returns records in which only the repair and custom job purchases of the individual customer are included in the query.

12. Complete the **Repair/Custom** tab fields as needed.
13. Select the **Appraisal** tab if needed.

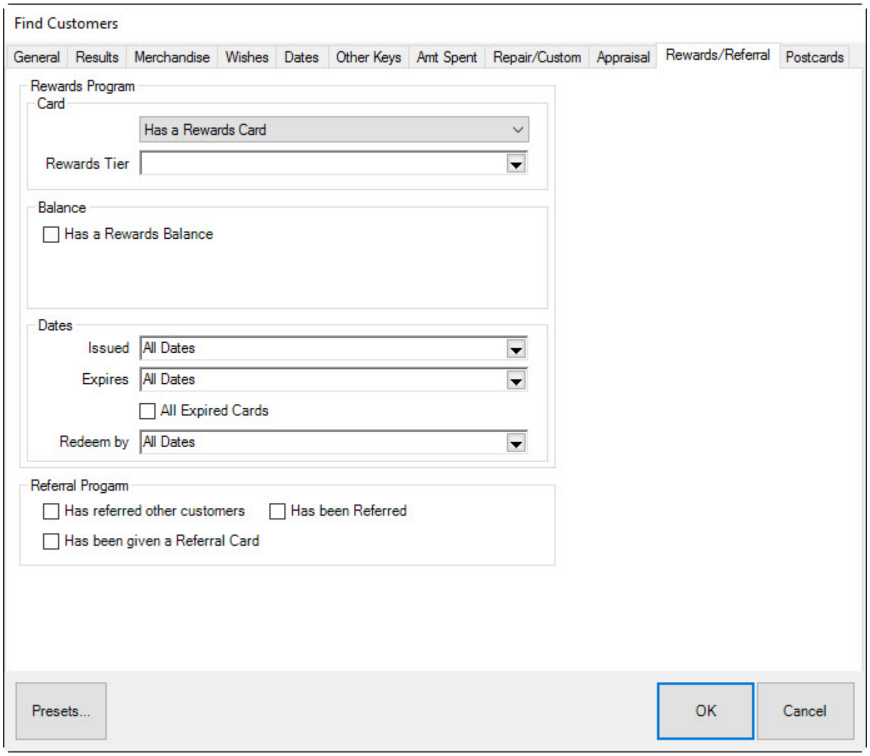


Fields and options in the **Appraisal** tab include:

HAS at least this many appraisals.	For any of the parameters entered below, the intent is to require that results include records with these values as a minimum.
No. Appraisals	Returns customers with at least this many appraisals.
Appraisal Filter	Allows you to use the **Find Appraisal** feature to specify the appraisal options to include.
Couple	Returns records in which the appraisals of both the customer and spouse/partner are included in the query.
Individual	Returns records in which only the appraisals of the individual customer are included in the query.
DOES NOT HAVE this many appraisals.	For any of the parameters entered below, the intent is to require that results include records with values less than those indicated.
No. Appraisals	Excludes customers with at least this many appraisals.
Appraisal Filter	Allows you to use the **Find Appraisal** feature to specify the appraisal options to exclude.

Couple	Returns records in which the appraisals of both the customer and spouse/partner are included in the query.
Individual	Returns records in which only the appraisals of the individual customer are included in the query.

14. Complete fields in the **Appraisal** tab as desired.
15. Select the **Rewards/Referral** tab if needed.



Rewards Program

Card: Has a Rewards Card

Rewards Tier:

Balance

☐ Has a Rewards Balance

Dates

Issued: All Dates

Expires: All Dates

☐ All Expired Cards

Redeem by: All Dates

Referral Progam

☐ Has referred other customers ☐ Has been Referred

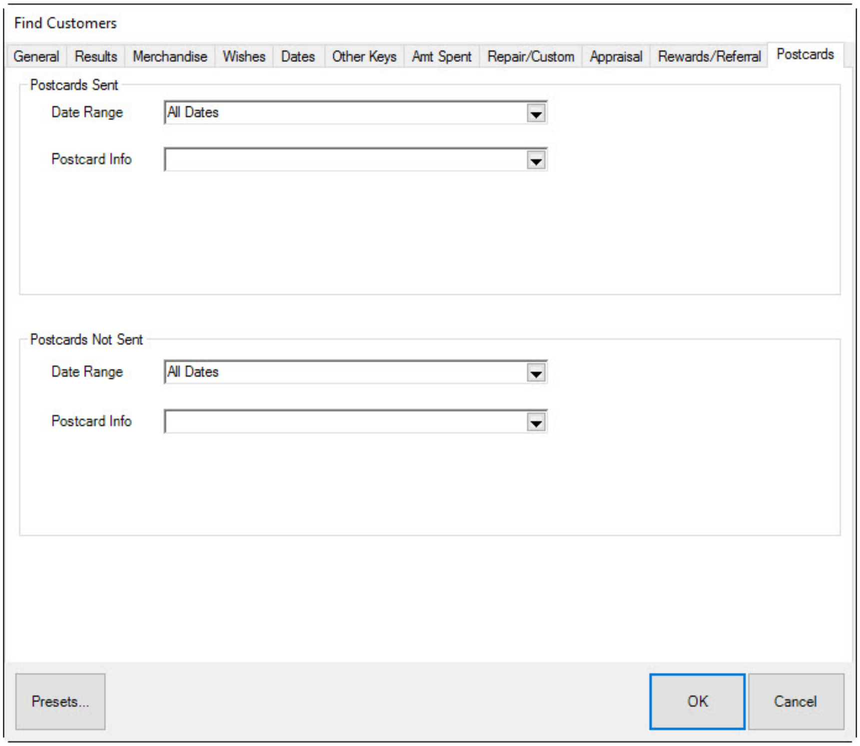
☐ Has been given a Referral Card

Fields and options in the **Rewards/Referral** tab vary depending on the value selected from the Card drop-down menu. They might include:

Has a Rewards Card	Returns customers who have rewards cards.
Rewards Tier	Returns customers with a rewards card that is assigned to the specified tier.
Has a Rewards Balance	Returns customers who balances on their rewards card.
Issued	Returns customers with rewards cards issued during the specified date range.

Expires	Returns customers with rewards cards that expire during the specified date range.
Redeem by	Returns customers who have balances that must be redeemed by a date within the specified date range.
Has Referred Other Customers	Returns customers who have made referrals.
Has Been Referred	Returns customers who have been referred.
Has Been Given a Referral Card	Returns customers who have received referral cards.

16. Complete the fields in the **Rewards/Referral** tab as desired. Select the **Postcards** tab if needed.



Date Range: All Dates

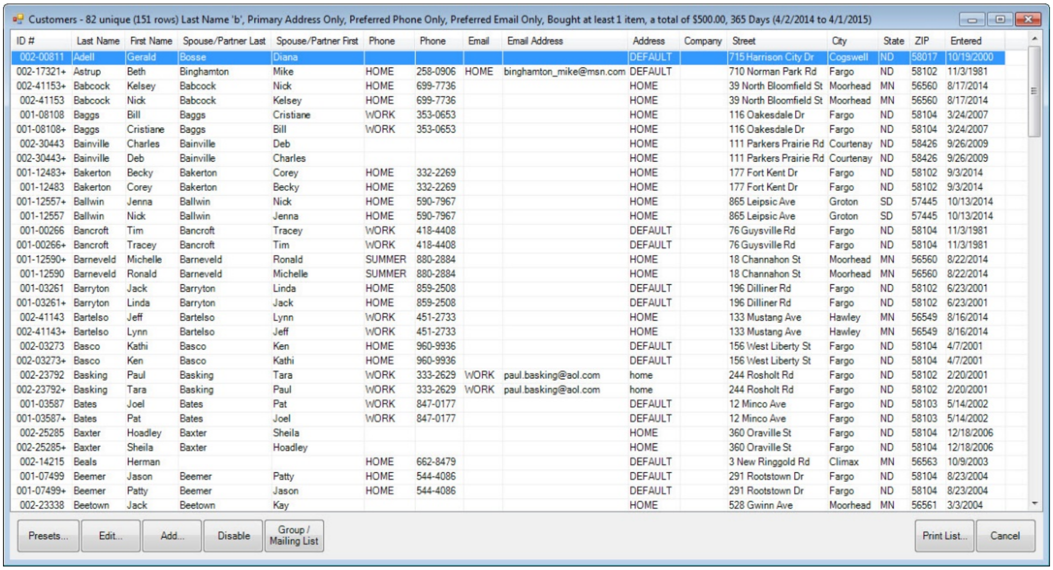
Date Range: All Dates

Fields and options included in the **Postcards** tab include:

Postcards Sent	Used to retrieve records concerning customers who have received specified postcards.
Date Range	Returns customers who were sent postcards during the specified time frame.
Postcard Info	Returns customers who were sent the specified postcard(s).

Postcards Not Sent	Used to retrieve records concerning customers who have not received specified postcards.
Postcard Info	Returns customers who were not sent postcards during the specified time frame.
Date	Returns customers who were not sent the specified postcard(s).

17. Once all of the desired information has been entered, select **OK**. A list of matching customers will appear.



Customers - 82 unique (151 rows) Last Name 'b', Primary Address Only, Preferred Phone Only, Preferred Email Only, Bought at least 1 item, a total of $500.00, 365 Days (4/2/2014 to 4/1/2015)

ID #	Last Name	First Name	Spouse/Partner Last	Spouse/Partner First	Phone	Phone	Email	Email Address	Address	Company	Street	City	State	ZIP	Entered
002-00811	Adell	Gerald	Bosse	Diana					DEFAULT		715 Harrison City Dr	Cogswell	ND	58017	10/19/2000
002-17321+	Astrup	Beth	Binghamton	Mike	HOME	258-0906	HOME	binghamton_mike@msn.com	DEFAULT		710 Norman Park Rd	Fargo	ND	58102	11/3/1981
002-41153+	Babcock	Kelsey	Babcock	Nick	HOME	699-7736			HOME		39 North Bloomfield St	Moorhead	MN	56560	8/17/2014
002-41153	Babcock	Nick	Babcock	Kelsey	HOME	699-7736			HOME		39 North Bloomfield St	Moorhead	MN	56560	8/17/2014
001-08108	Baggs	Bill	Baggs	Cristiane	WORK	353-0653			HOME		116 Oakesdale Dr	Fargo	ND	58104	3/24/2007
001-08108+	Baggs	Cristiane	Baggs	Bill	WORK	353-0653			HOME		116 Oakesdale Dr	Fargo	ND	58104	3/24/2007
002-30443	Bainville	Charles	Bainville	Deb					HOME		111 Parkers Prairie Rd	Courtenay	ND	58426	9/26/2009
002-30443+	Bainville	Deb	Bainville	Charles					HOME		111 Parkers Prairie Rd	Courtenay	ND	58426	9/26/2009
001-12483+	Bakerton	Becky	Bakerton	Corey	HOME	332-2269			HOME		177 Fort Kent Dr	Fargo	ND	58102	9/3/2014
001-12483	Bakerton	Corey	Bakerton	Becky	HOME	332-2269			HOME		177 Fort Kent Dr	Fargo	ND	58102	9/3/2014
001-12557+	Ballwin	Jenna	Ballwin	Nick	HOME	590-7967			HOME		865 Leipsic Ave	Groton	SD	57445	10/13/2014
001-12557	Ballwin	Nick	Ballwin	Jenna	HOME	590-7967			HOME		865 Leipsic Ave	Groton	SD	57445	10/13/2014
001-00266	Bancroft	Tim	Bancroft	Tracey	WORK	418-4408			DEFAULT		76 Guysville Rd	Fargo	ND	58104	11/3/1981
001-00266+	Bancroft	Tracey	Bancroft	Tim	WORK	418-4408			DEFAULT		76 Guysville Rd	Fargo	ND	58104	11/3/1981
001-12590+	Barneveld	Michelle	Barneveld	Ronald	SUMMER	880-2884			HOME		18 Channahon St	Moorhead	MN	56560	8/22/2014
001-12590	Barneveld	Ronald	Barneveld	Michelle	SUMMER	880-2884			HOME		18 Channahon St	Moorhead	MN	56560	8/22/2014
001-03261	Barryton	Jack	Barryton	Linda	HOME	859-2508			DEFAULT		196 Dilliner Rd	Fargo	ND	58102	6/23/2001
001-03261+	Barryton	Linda	Barryton	Jack	HOME	859-2508			DEFAULT		196 Dilliner Rd	Fargo	ND	58102	6/23/2001
002-41143	Bartelso	Jeff	Bartelso	Lynn	WORK	451-2733			HOME		133 Mustang Ave	Hawley	MN	56549	8/16/2014
002-41143+	Bartelso	Lynn	Bartelso	Jeff	WORK	451-2733			HOME		133 Mustang Ave	Hawley	MN	56549	8/16/2014
002-03273	Basco	Kathi	Basco	Ken	HOME	960-9936			DEFAULT		156 West Liberty St	Fargo	ND	58104	4/7/2001
002-03273+	Basco	Ken	Basco	Kathi	HOME	960-9936			DEFAULT		156 West Liberty St	Fargo	ND	58104	4/7/2001
002-23792	Basking	Paul	Basking	Tara	WORK	333-2629	WORK	paul.basking@aol.com	home		244 Rosholt Rd	Fargo	ND	58102	2/20/2001
002-23792+	Basking	Tara	Basking	Paul	WORK	333-2629	WORK	paul.basking@aol.com	home		244 Rosholt Rd	Fargo	ND	58102	2/20/2001
001-03587	Bates	Joel	Bates	Pat	WORK	847-0177			DEFAULT		12 Minco Ave	Fargo	ND	58103	5/14/2002
001-03587+	Bates	Pat	Bates	Joel	WORK	847-0177			DEFAULT		12 Minco Ave	Fargo	ND	58103	5/14/2002
002-25285	Baxter	Hoadley	Baxter	Sheila					HOME		360 Oraville St	Fargo	ND	58104	12/18/2006
002-25285+	Baxter	Sheila	Baxter	Hoadley					HOME		360 Oraville St	Fargo	ND	58104	12/18/2006
002-14215	Beals	Herman			HOME	662-8479			DEFAULT		3 New Ringgold Rd	Climax	MN	56563	10/9/2003
001-07499	Beemer	Jason	Beemer	Patty	HOME	544-4086			DEFAULT		291 Rootstown Dr	Fargo	ND	58104	8/23/2004
001-07499+	Beemer	Patty	Beemer	Jason	HOME	544-4086			DEFAULT		291 Rootstown Dr	Fargo	ND	58104	8/23/2004
002-23338	Beetown	Jack	Beetown	Kay					HOME		528 Gwinn Ave	Moorhead	MN	56561	3/3/2004

Notice in these results that some records are highlighted in gray; the gray records do not represent unique customer records, but instead show additional contact information for a customer. In the event of a mailing, only the primary information (shown with the bright white background) is included.

18. From this window, you can:

Add	Allows you to add a customer as described in the section entitled Adding a Customer.
Disable	Allows you to disable a customer record. A customer can only be disabled if there has never been any activity on his record. The record will be flagged as inactive.
Edit	Allows you to edit or view a customer's record using the same fields that appear in the section entitled Working with Customer Records.

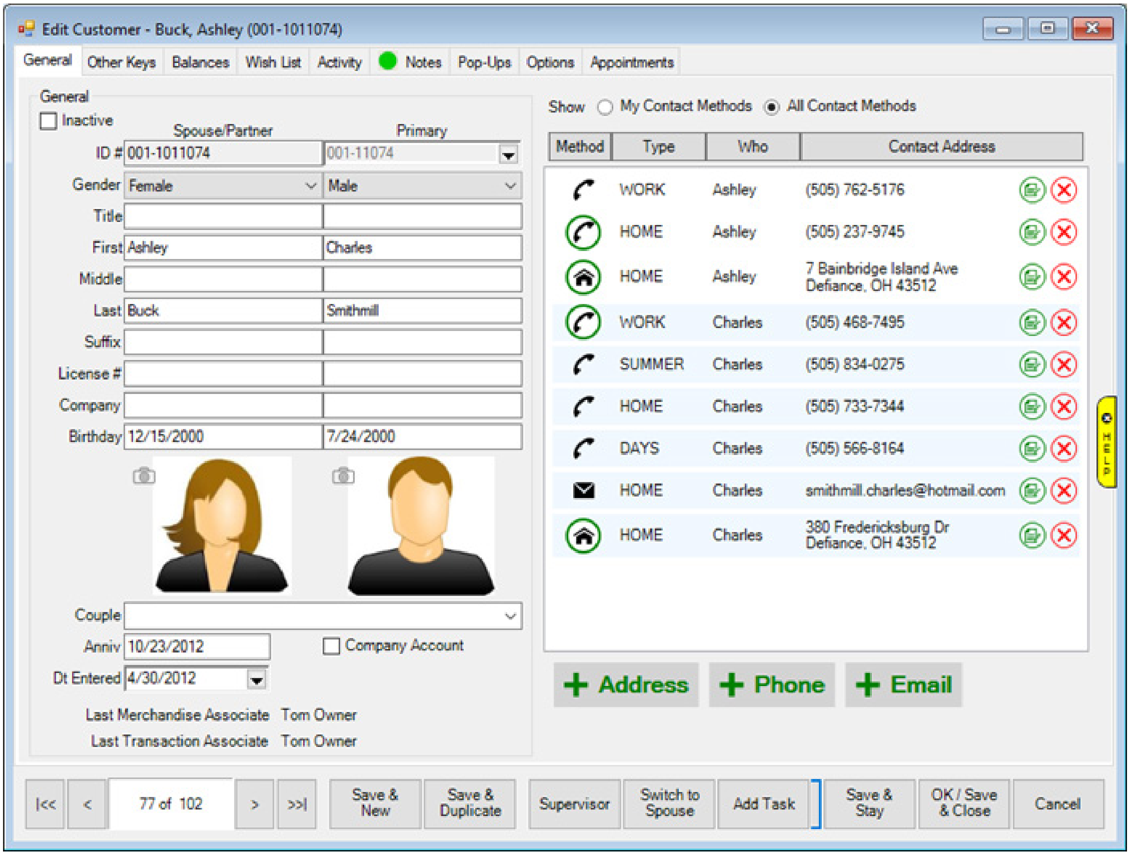
- **These query fields are provided as a means of narrowing your search. For example, if you select a customer whose name is Smith, then go to Amount Spent and indicate you only want those who spent at least $500, you will get only records that match BOTH those criteria.**
- **Since results are provided in a table that can be sorted by any field, you have a choice of narrowing your search or sorting your results and making your selection from there.**

4.2 Working with Customer Records

This section details the information found in each customer record. From the customer record, you can make changes as described in each section. To work with these tabs, find the customer record as described in the section entitled Finding a Customer. From the results, select the customer record to edit and select **Edit**. These records are also available from point of sale and other areas of The Edge.

4.2.1 Customer General Tab

Containing the basic contact information about the customer, the **Edit Customer** window will open with the **General** tab open.



General

☐ Inactive

	Spouse/Partner	Primary
ID #	001-1011074	001-11074
Gender	Female	Male
Title		
First	Ashley	Charles
Middle		
Last	Buck	Smithmill
Suffix		
License #		
Company		
Birthday	12/15/2000	7/24/2000

Couple

Anniv 10/23/2012 ☐ Company Account

Dt Entered 4/30/2012

Last Merchandise Associate Tom Owner

Last Transaction Associate Tom Owner

Show ○ My Contact Methods ● All Contact Methods

Method	Type	Who	Contact Address
☎	WORK	Ashley	(505) 762-5176
☎	HOME	Ashley	(505) 237-9745
⌂	HOME	Ashley	7 Bainbridge Island Ave Defiance, OH 43512
☎	WORK	Charles	(505) 468-7495
☎	SUMMER	Charles	(505) 834-0275
☎	HOME	Charles	(505) 733-7344
☎	DAYS	Charles	(505) 566-8164
✉	HOME	Charles	smithmill.charles@hotmail.com
⌂	HOME	Charles	380 Fredericksburg Dr Defiance, OH 43512

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The primary customer is on the left and the spouse/partner is on the right. If you use Switch to Spouse, primary and spouse/partner keep the same relationship but the data view focus will change. To change who is actually primary, go to the Supervisor menu and select Set as Primary Customer.

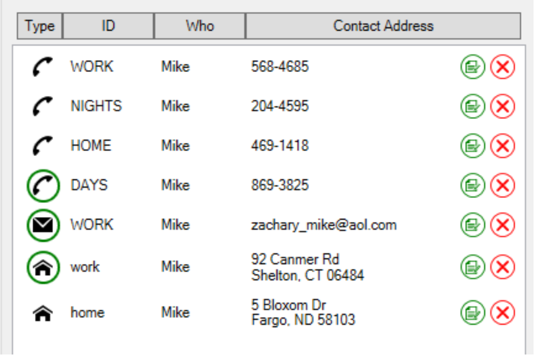
Fields and options in the **General** tab include:

General

Inactive	Indicates whether the customer has been marked inactive.
ID #	The customer's/spouse's Edge identification number.
Gender	Indicate the gender of the customer/spouse.
Title	Specify a title for the customer/spouse.
First/Middle/Last	Specify the customer/spouse name. If the first and last name fields for the spouse/partner are not completed, The Edge will not create a spouse/partner record.
Suffix	Specify a suffix for the customer/spouse (Jr., Sr., etc.)
License	Specify the customer's/spouse's license number.
Company	Specify a company name for this customer record.
Birthday	The customer/spouse birthday.
Camera icon (📷)	Returns photo menu to capture an image of the customer as described in the section entitled Adding and Managing Photos.
Couple	Defines how to display the customer and their spouse on receipts and mailings.
Anniv	The customer's wedding anniversary.
Company Account	Indicates whether this is a corporate account.
Date Entered	The date the customer was entered.
Last Merchandise Associate	Associate that last processed a merchandise sale or service intake for this customer.
Last Transaction Associate	Associate that last processed any type of transaction for this customer.

Contact Methods

Lists contact methods for both the customer and any linked spouse/partner records. You can show:
My Contact Methods: Those for just the customer
All Contact Methods: Those for the customer and any linked records.



Type	ID	Who	Contact Address
☎	WORK	Mike	568-4685
☎	NIGHTS	Mike	204-4595
☎	HOME	Mike	469-1418
☎	DAYS	Mike	869-3825
✉	WORK	Mike	zachary_mike@aol.com
⌂	work	Mike	92 Canmer Rd Shelton, CT 06484
⌂	home	Mike	5 Bloxom Dr Fargo, ND 58103

In the list of available contact methods, fields include:
Method: The contact method, i.e., phone, email, etc.
Type: Where the person will be reached.
Who: Whether it goes to the primary contact on the record or the spouse/partner.
Contact Address: The specific value.

- **Contact methods with a green circle indicate the preferred contact number for each contact method.**
- **When you choose a different contact method other than the default, that is the contact method that will appear in the transaction record.**
- **If a contact method is the same for both parties, there is no option to remove a party in the edit window. To remove that contact from the record, use the Delete icon.**

To edit a contact method, select the green edit button (✎).
To delete a contact method, select the red delete button (⊗).

+ Address

Offers the add **Customer Address** window where you can add a new address. For more information, see the section entitled Adding a Customer Address.

+ Phone

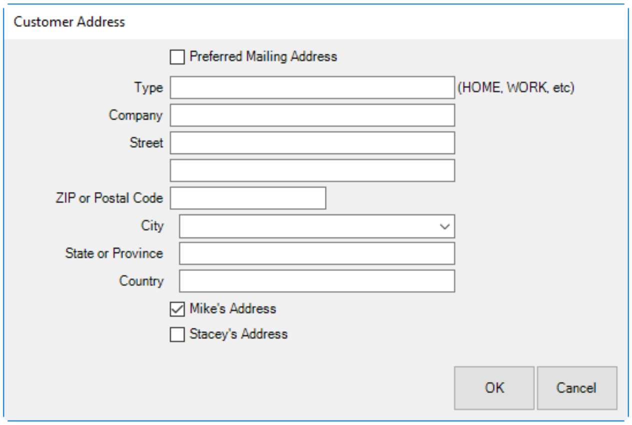
Offers the **Customer Phone Number** window where you add a new phone number. For more information, see the section entitled Adding a Customer Phone Number.

+ Email	Offers the **Customer Email** window where you can add a new email address. For more information, see the section entitled Adding a Customer Email Address.

4.2.1.1 Adding a Customer Address

To add a customer address:

1. From the **Customer Edit General** tab, select **+Address** (+ Address). The **Customer Address** window will appear.



Customer Address

☐ Preferred Mailing Address

Type (HOME, WORK, etc)

Company

Street

ZIP or Postal Code

City

State or Province

Country

☑ Mike's Address

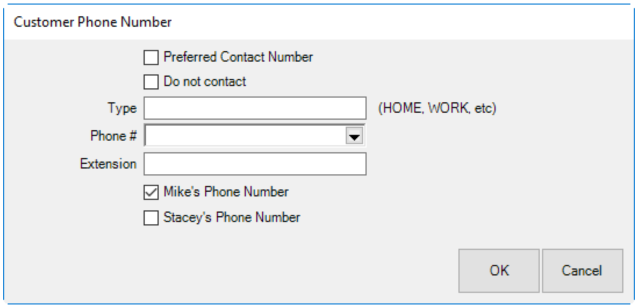
☐ Stacey's Address

2. Indicate whether the address is the preferred address. This indicates that the address will be used by default. It will also serve as a filter when creating lists that have the **Preferred Address Only** parameter.
3. Select a **Type**. This indicates the location of the address, e.g., `Home`, `Office`, etc.
4. Complete the address fields.
5. Indicate whether this is the primary contact's address, in this example, `Mike's Address` or `Stacey's Address`.
6. Select **OK**. The new address will appear in the **Contact Method** list.

4.2.1.2 Adding a Customer Phone Number

To add a customer phone:

1. From the **Customer Edit General** tab, select **+ Phone** (+ Phone). The **Customer Phone Number** window will appear.



Customer Phone Number

☐ Preferred Contact Number
☐ Do not contact
Type (HOME, WORK, etc)
Phone #
Extension
☑ Mike's Phone Number
☐ Stacey's Phone Number

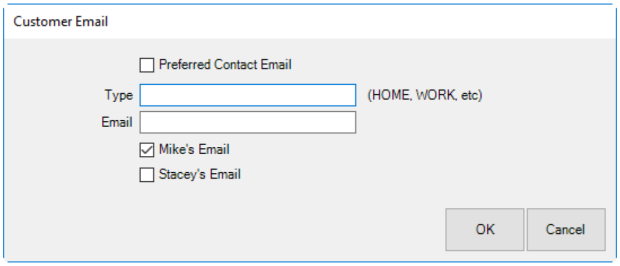
2. Indicate whether the number is the preferred number. This indicates that the number will be used by default.
3. Indicate whether this number is a Do Not Contact number. If the number is checked, it will not be used in certain features such as text message marketing.
4. Select a **Type**. This indicates the location of the number, e.g., `Home`, `Office`, etc.
5. Enter a phone number.
6. If applicable, enter a telephone extension.
7. Indicate whether this is the primary contact's number, in this example, `Mike's Phone Number` or `Stacey's Phone Number`.
8. Select **OK**. The new number will appear in the **Contact Method** list.

If there was previously no phone number, a newly added one will automatically be marked **Preferred**. You can uncheck it if necessary.

4.2.1.3 Adding a Customer Email Address

To add a customer email:

1. From the **Customer Edit General** tab, select + **Email** (+ Email). The **Customer Email** window will appear.



Customer Email

☐ Preferred Contact Email
Type (HOME, WORK, etc)
Email
☑ Mike's Email
☐ Stacey's Email

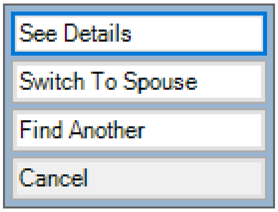
2. Indicate whether the email address is the preferred email address. This indicates that the email will be used by default.
3. Select a **Type**. This indicates the location of the email, e.g., `Home`, `Office`, etc.
4. Enter an email address.

5. Indicate whether this is the primary contact's email, in this example, `Mike's Email` or `Stacey's Email`.
6. Select **OK**. The new email address will appear in the **Contact Method** list.

If there was previously no email, a newly added one will automatically be marked **Preferred**. You can uncheck it if necessary.

4.2.1.4 Working with Spouse/Partner Records

In the **Customer Edit** window, **General** tab, there is a drop-down meu for the spouse/partner. This contains options for working with the spouse/partner record.

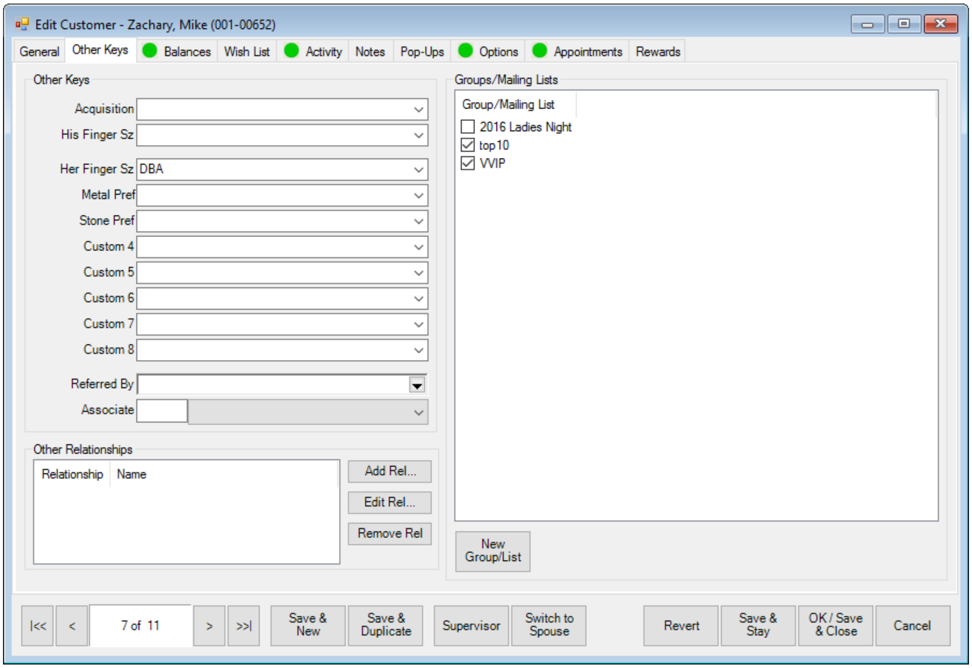


Options in the **Spouse/Partner** drop-down menu include:

See Details	Opens the customer record with the spouse/partner details.
Switch to Spouse	Reverses the customer record with the spouse/partner as active.
Find Another	Allows you to attach another customer record as the spouse/partner.
Cancel	Cancels out of this menu and returns you to the **Customer Edit** window.

- **When adding spouse information to a customer record, after you have entered and first and last name and tabbed out, The Edge will check for duplicate records as described in the section entitled Adding a Customer.**
- **If the spouse/partner fields for first and last name are not populated, The Edge will not save the spouse/partner record.**

4.2.2 Other Keys Tab


Edit Customer - Zachary, Mike (001-00652)

Her Finger Sz: DBA

Group/Mailing List

☐ 2016 Ladies Night
☑ top10
☑ VVIP

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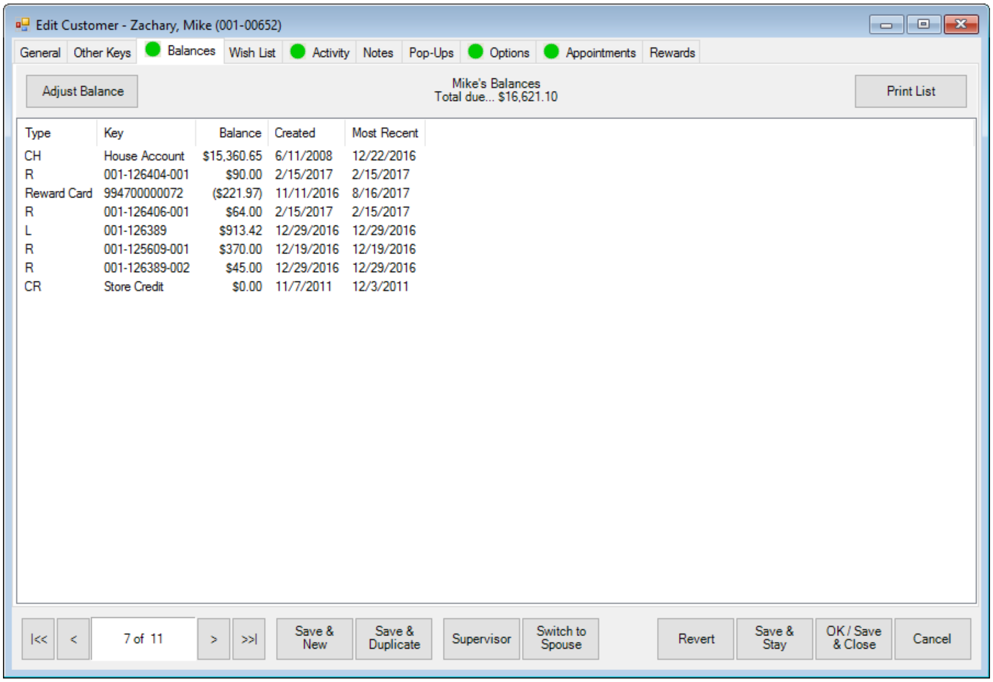
Fields and options in the **Other Keys** tab include:

Acquisition	Indicates how the customer came to be associated with the store based on their response to the **Why In** field on their first purchase.
Custom 1-8	These are store-defined parameters for which the names can be altered in **System Options**. Note that these legends are user-defined.
Referred By	Allows you to use the **Customer Find** feature to indicate by whom the customer was referred to the store.
Associate	Allows you to assign an associate to manage this customer.
Groups/Mailing Lists	Indicates what groups and mailing lists the customer is included in.
New Group/List	Allows you to immediately create a new group or list and include the customer in it.

4.2.3 Balances Tab

If a customer has outstanding balances, a green circle will appear on the Balances tab of the window. Of course, for a new customer, there should be no balances.



Mike's Balances
Total due... $16,621.10

Type	Key	Balance	Created	Most Recent
CH	House Account	$15,360.65	6/11/2008	12/22/2016
R	001-126404-001	$90.00	2/15/2017	2/15/2017
Reward Card	994700000072	($221.97)	11/11/2016	8/16/2017
R	001-126406-001	$64.00	2/15/2017	2/15/2017
L	001-126389	$913.42	12/29/2016	12/29/2016
R	001-125609-001	$370.00	12/19/2016	12/19/2016
R	001-126389-002	$45.00	12/29/2016	12/29/2016
CR	Store Credit	$0.00	11/7/2011	12/3/2011

The **Balances** tab contains a listing of account balances, including house accounts, credits, and service jobs.

In this tab, a supervisor can manually adjust a customer balance without the customer charging to or paying on the account.

Use of this function is not recommended for day-to-day transaction corrections. It is only recommended to correct conversion errors during the first days of using The Edge after conversion.

Fields in the **Balances** tab include:

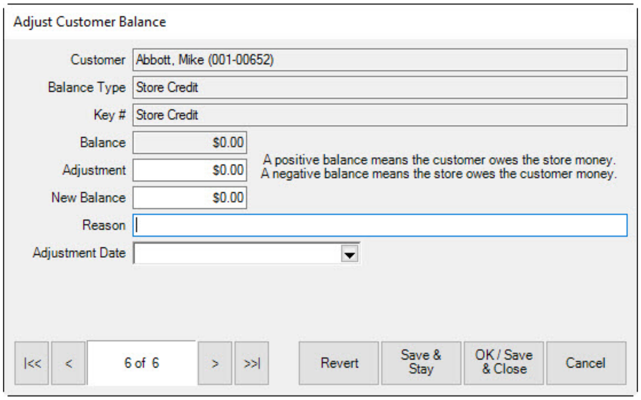
Type	Lists the type of balance: **R** Repair **L** Layaway

	S Special Order **A** Appraisal **CH** Store Charge **CR** Store Credit.
Key	Transaction ID number.
Balance	The present balance on the listed account.
Created	Date the balance appeared on the record.
Most Recent	The most recent date sales were charged to the account.

For couples, balances are blended to include transactions conducted by both parties.

To adjust a balance:

1. Select **Adjust Balance** from the **Balances** tab of the customer edit window. The **Adjust Customer Balance** window will appear.



Adjust Customer Balance

Customer: Abbott, Mike (001-00652)
Balance Type: Store Credit
Key #: Store Credit
Balance: $0.00
Adjustment: $0.00
New Balance: $0.00
Reason:
Adjustment Date:

A positive balance means the customer owes the store money.
A negative balance means the store owes the customer money.

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2. In the **Adjustment** field, enter an amount by which to adjust the balance. These balances are based from the store's liability point of view.

Rewards Account	To increase the rewards to the customer, enter a negative amount.
Credit Memos	To increase the credit to the customer, enter a negative amount.
House/Credit Accounts	To decrease the amount owed by the customer, enter negative amount.
Layaways	To decrease the amount owed by the customer, enter a negative amount.

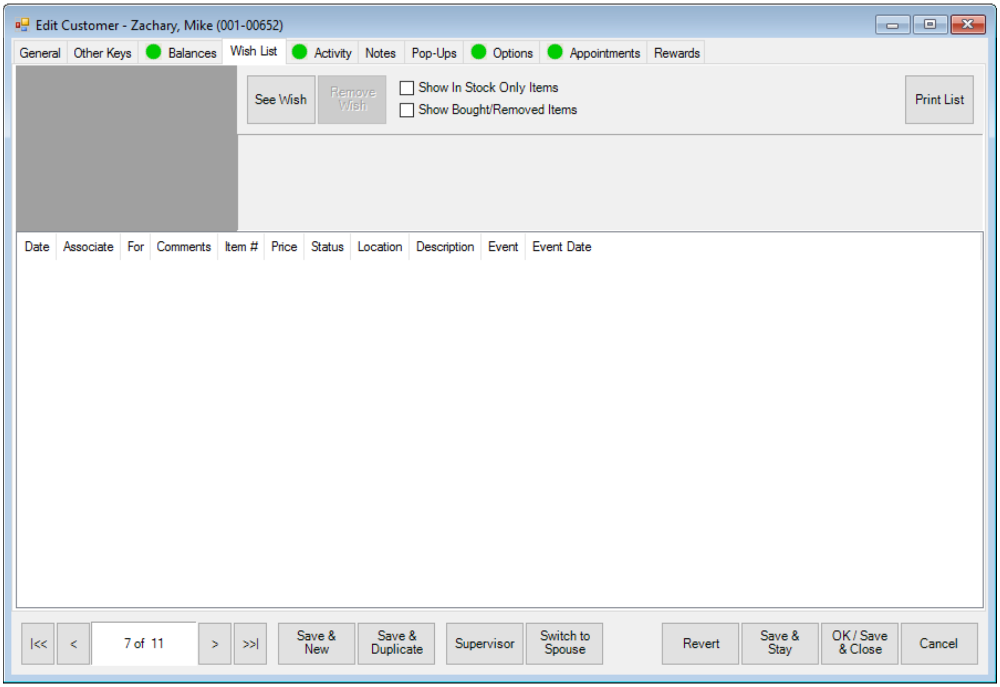
These amounts will not appear as negative on the customer's receipt. Many of these activities will happen at point of sale in the form of payments.

3. Enter a reason in the **Reason** field.
4. Select a date from the **Adjustment Date** date picker.
5. Select **OK/Save & Close**.

Note that balance adjustments may impact your bookkeeping:

- **House Account and Credit Memo – These adjustments will post as sales activity on the specified adjustment date.**
- **Layaway – Adjusting a balance here may require manual adjustments to accounting and will appear confusing on balance reports. Best practice: Cancel the open layaway and re-enter the layaway with an updated price.**
- **Special Order – Adjusting a balance here may appear confusing on balance and on account reports. Best practice: Adjust the price of a special order by editing the service record under Services ► Find.**
- **Repair – Adjusting a balance here may appear confusing on balance and on account reports. Best practice: Adjust the price of a repair by editing the service record under Services ► Find.**
- **Custom – Adjusting a balance here may appear confusing on balance and on account reports. Best practice: Adjust the price of a custom job by editing the service record under Services ► Find.**
- **Appraisal – Adjusting a balance here may appear confusing on balance and on account reports. Best practice: Adjust the price of an appraisal by editing the service record under Services ► Find.**

4.2.4 Wish List Tab



The **Wish List** tab fields contain values entered at point of sale. Fields and options in the **Wish List** tab include:

See Wish	Open a selected wish for more details.
Remove Wish	Removes the selected wish. It is only active if a wish is selected.
Show In Stock Only Items	Indicates whether results should be limited to items available in the store.
Show Bought/Removed Items	Indicates whether results should include items that have already been purchased or removed from the list.
Date	Date the item was added to the wish list.
Associate	ID of the associate who entered the item.
For	If the item is intended as a gift, for whom it is intended.
Comments	Notes about the item for the purposes of the wish list.
Item #	The ID number of the item.
Price	The price of the item.
Status	The status of the item in inventory.
Location	The location of the item in the store.

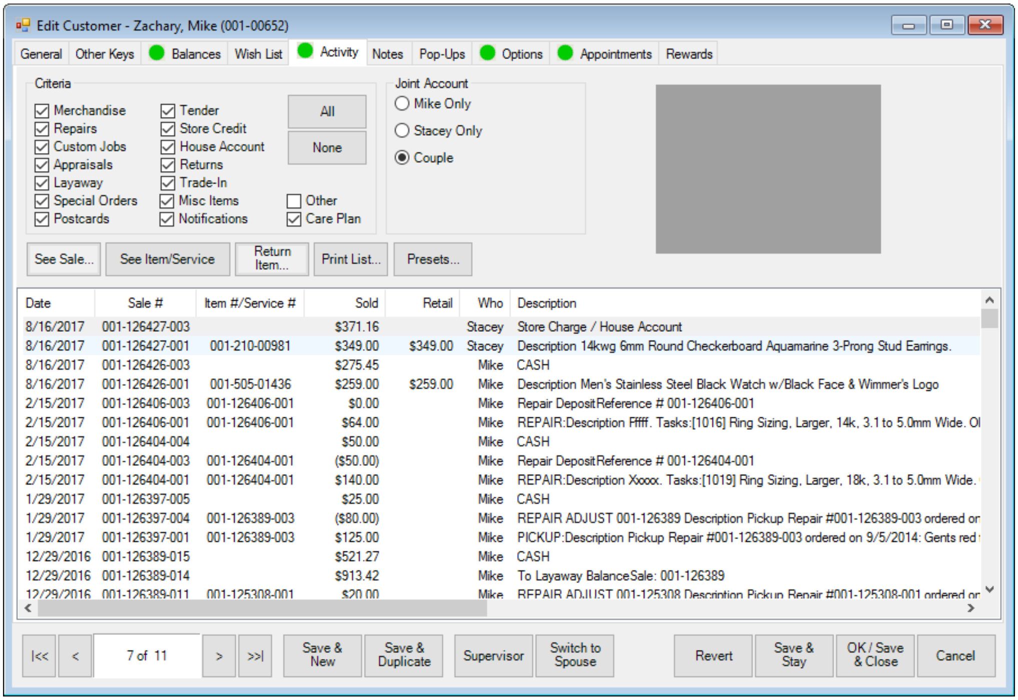
Description	A description of the item.
Event	The event for which the item is intended (birthday, anniversary, etc.)
Event Date	The date of the event above.

Wish list entries are color coded as follows:

White	In-stock, current wish list items
Green	Wish list items that are on sale
Red	Sold wish list items

To work with a wish from this window, double-click it. For more on working with Wish List items, see the section entitled Wish List.

4.2.5 Activity Tab



Criteria

☑ Merchandise
☑ Repairs
☑ Custom Jobs
☑ Appraisals
☑ Layaway
☑ Special Orders
☑ Postcards
☑ Tender
☑ Store Credit
☑ House Account
☑ Returns
☑ Trade-In
☑ Misc Items
☑ Notifications
☐ Other
☑ Care Plan

Joint Account

○ Mike Only
○ Stacey Only
● Couple

Date	Sale #	Item #/Service #	Sold	Retail	Who	Description
8/16/2017	001-126427-003		$371.16		Stacey	Store Charge / House Account
8/16/2017	001-126427-001	001-210-00981	$349.00	$349.00	Stacey	Description 14kwg 6mm Round Checkerboard Aquamarine 3-Prong Stud Earrings.
8/16/2017	001-126426-003		$275.45		Mike	CASH
8/16/2017	001-126426-001	001-505-01436	$259.00	$259.00	Mike	Description Men's Stainless Steel Black Watch w/Black Face & Wimmer's Logo
2/15/2017	001-126406-003	001-126406-001	$0.00		Mike	Repair DepositReference # 001-126406-001
2/15/2017	001-126406-001	001-126406-001	$64.00		Mike	REPAIR:Description Fffff. Tasks:[1016] Ring Sizing, Larger, 14k, 3.1 to 5.0mm Wide. Ol
2/15/2017	001-126404-004		$50.00		Mike	CASH
2/15/2017	001-126404-003	001-126404-001	($50.00)		Mike	Repair DepositReference # 001-126404-001
2/15/2017	001-126404-001	001-126404-001	$140.00		Mike	REPAIR:Description Xxxxx. Tasks:[1019] Ring Sizing, Larger, 18k, 3.1 to 5.0mm Wide.
1/29/2017	001-126397-005		$25.00		Mike	CASH
1/29/2017	001-126397-004	001-126389-003	($80.00)		Mike	REPAIR ADJUST 001-126389 Description Pickup Repair #001-126389-003 ordered on
1/29/2017	001-126397-001	001-126389-003	$125.00		Mike	PICKUP:Description Pickup Repair #001-126389-003 ordered on 9/5/2014: Gents red
12/29/2016	001-126389-015		$521.27		Mike	CASH
12/29/2016	001-126389-014		$913.42		Mike	To Layaway BalanceSale: 001-126389
12/29/2016	001-126389-011	001-125308-001	$20.00		Mike	REPAIR ADJUST 001-125308 Description Pickup Repair #001-125308-001 ordered on

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The **Activity** tab contains data concerning the customer's transaction history. Notice that spouse/partner activity is included, but highlighted in light blue. Fields and options in the **Activity** tab include:

Criteria	Allows you to narrow the list of transactions listed. • **Merchandise** • **Repairs** • **Custom Jobs** • **Appraisals** • **Layaway** • **Special Orders** • **Postcards** • **Tender** • **Store Credit** • **House Account** • **Returns** • **Trade-In** • **Misc Items** • **Notifications** • **Care Plan** • **Other**.
All	Allows you to quickly select all type of criteria.
None	Allows you to quickly clear all types of criteria.
Joint Account	Whether to include just the customer, just the spouse/partner, or both as a couple.
See Sale	For an item listed in the record, it generates a preview of the sales receipt.
See Item/Services	For an item or service listed in the record, it opens the record.
Return Item	For an item listed in the record, it takes you to the **Point of Sale** window to process its return.
Print List	Generates a hard copy of the activity list.
Presets	Allows you to load or save settings for **Criteria**.
Date	The date of sale.
Sale#	The transaction ID number.
Item #/Service #	The item ID number or ID number of the service activity.
Sold	Price for which the item sold.
Retail	The original full retail price.
Desc	A description of the item.

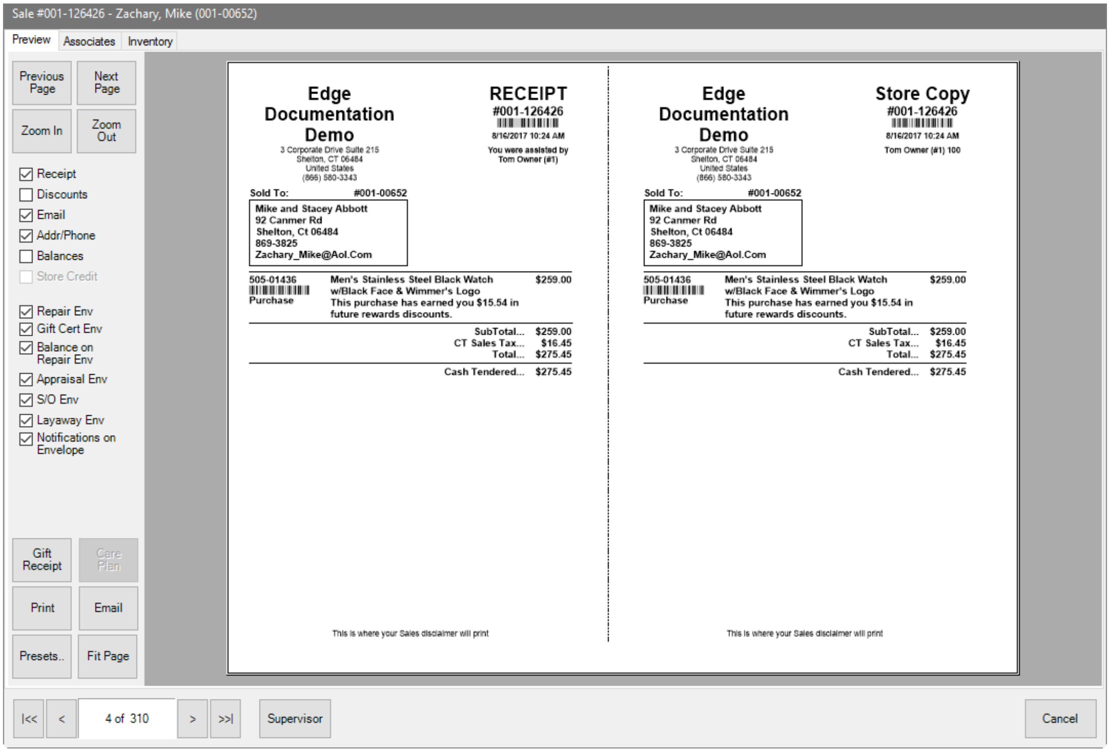
The **Activity** tab of the **Customer** window includes a listing of transactions and other activities involving that customer. From here you can work with sales, make returns, and provide information to the customer about his or her accounts.

To work with activities:

1. From the **Customer** edit window, select the **Activity** tab.
2. Optionally, filter by criteria; options available vary based on the type of activity. The following sections outline those options.

4.2.5.1 See Sale

From the **Activity** tab of the **Customer Edit** window, select the transaction or event to be viewed and select **See Sale**. The receipt for that transaction will appear.



Edge Documentation Demo
3 Corporate Drive Suite 215
Shelton, CT 06484
United States
(866) 580-3343

RECEIPT
#001-126426
8/16/2017 10:24 AM
You were assisted by
Tom Owner (#1)

Sold To: **#001-00652**
Mike and Stacey Abbott
92 Canmer Rd
Shelton, Ct 06484
869-3825
Zachary_Mike@Aol.Com

505-01436 Purchase	Men's Stainless Steel Black Watch w/Black Face & Wimmer's Logo This purchase has earned you $15.54 in future rewards discounts.	$259.00

SubTotal... $259.00
CT Sales Tax... $16.45
Total... $275.45
Cash Tendered... $275.45

This is where your Sales disclaimer will print

Edge Documentation Demo
3 Corporate Drive Suite 215
Shelton, CT 06484
United States
(866) 580-3343

Store Copy
#001-126426
8/16/2017 10:24 AM
Tom Owner (#1) 100

Sold To: **#001-00652**
Mike and Stacey Abbott
92 Canmer Rd
Shelton, Ct 06484
869-3825
Zachary_Mike@Aol.Com

505-01436 Purchase	Men's Stainless Steel Black Watch w/Black Face & Wimmer's Logo This purchase has earned you $15.54 in future rewards discounts.	$259.00

SubTotal... $259.00
CT Sales Tax... $16.45
Total... $275.45
Cash Tendered... $275.45

This is where your Sales disclaimer will print

From here, you can use the **Supervisor** menu to void the sale, change the customer, change the associate, or change the **Why In?** value. Note that voiding a sale is not recommended. For record-keeping purposes, it is best to reverse the transaction.

Use the **Associates** tab to see commission data on the sale.
Use the **Inventory** tab to see item data.

4.2.5.2 See Item/Service

To view the details of a sale or service:

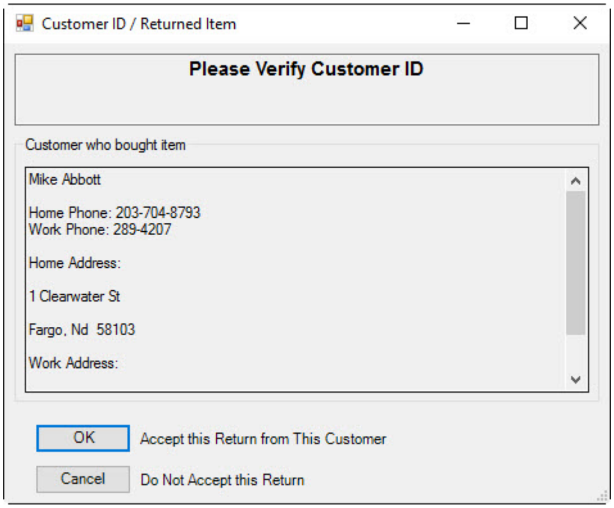
1. From the **Activity** tab of the **Customer Edit** window, select the sale to be viewed.

2. Select **See Item/Service**. The transaction record will appear.
3. Depending on the status of the item or service, you may be able to make changes. For sales, you can void the sale or change the **Why In?** value. For services, you can work with the service as you would at point of sale. However, we recommend reversing a sale rather than voiding it. If the activity is a postcard, editing the record will return the postcard record.

4.2.5.3 Return Item…

Items are usually returned at point of sale. But as an alternative, you can return them from the **Customer Edit** window. To return an item from the **Customer Edit ► Activity** tab:

1. From the **Activity** tab of the **Customer Edit** window, select the item to be returned and select **Return item…**. The **Returned Item** window will appear with the **Point of Sale** window.



Mike Abbott

Home Phone: 203-704-8793
Work Phone: 289-4207

Home Address:

1 Clearwater St

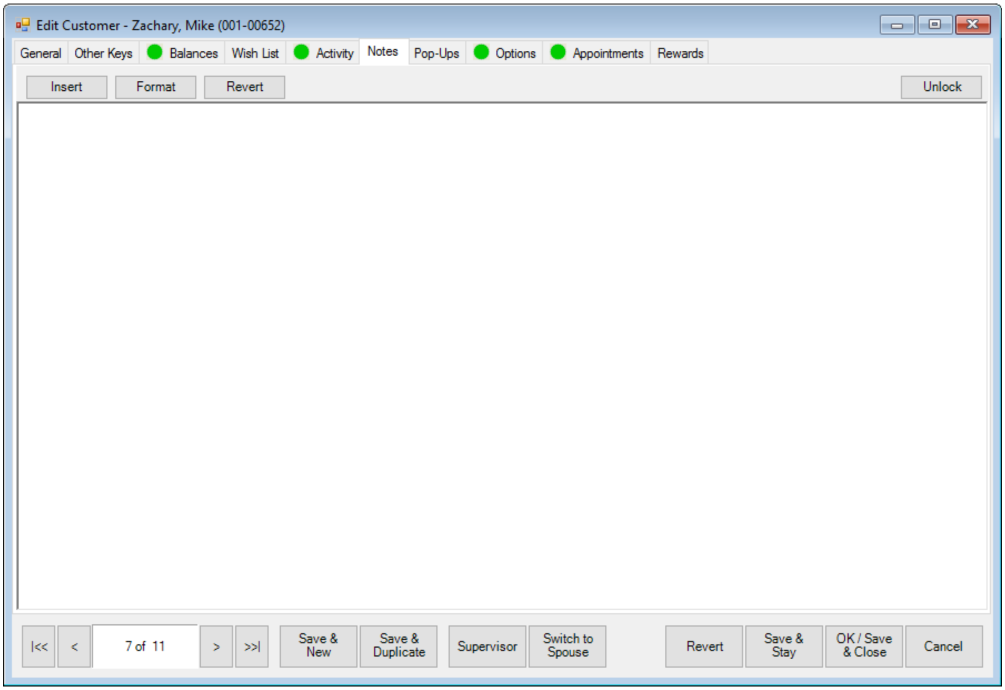
Fargo, Nd 58103

Work Address:

2. Verify the customer's ID and select **OK** to accept the return. The **Point of Sale** window will populate the return data as needed.
3. Process the return as normal.
4. Select **OK/Save & Close**.

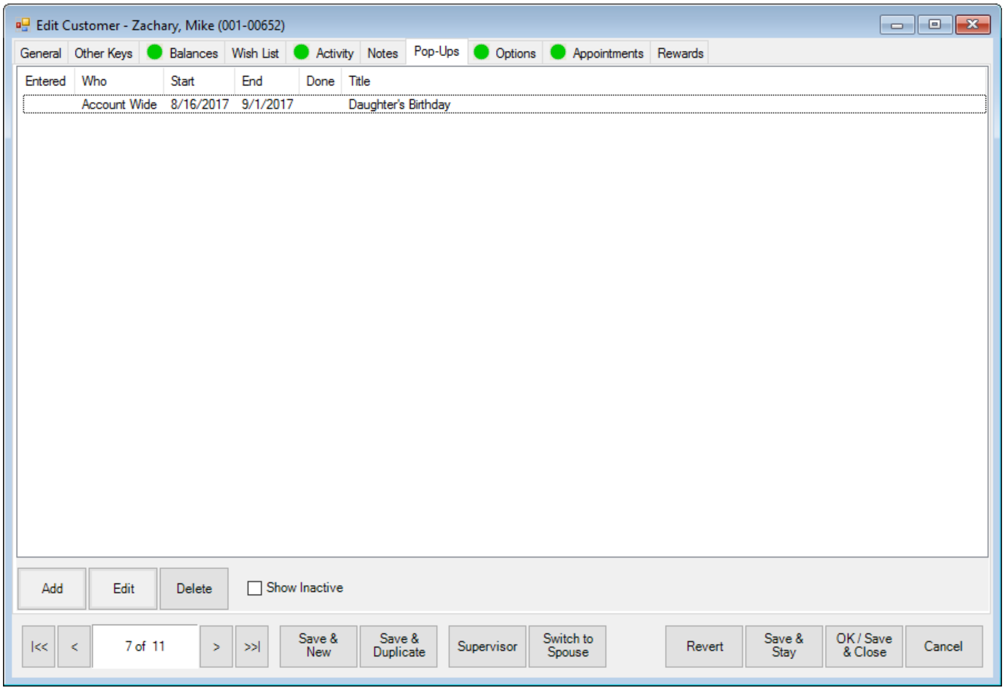
4.2.6 Customer Notes Tab

The **Notes** tab contains space for general information about the customer such as upcoming events and preferences.



For couples, notes will appear at POS for both parties.

4.2.7 Customer Pop-Ups Tab



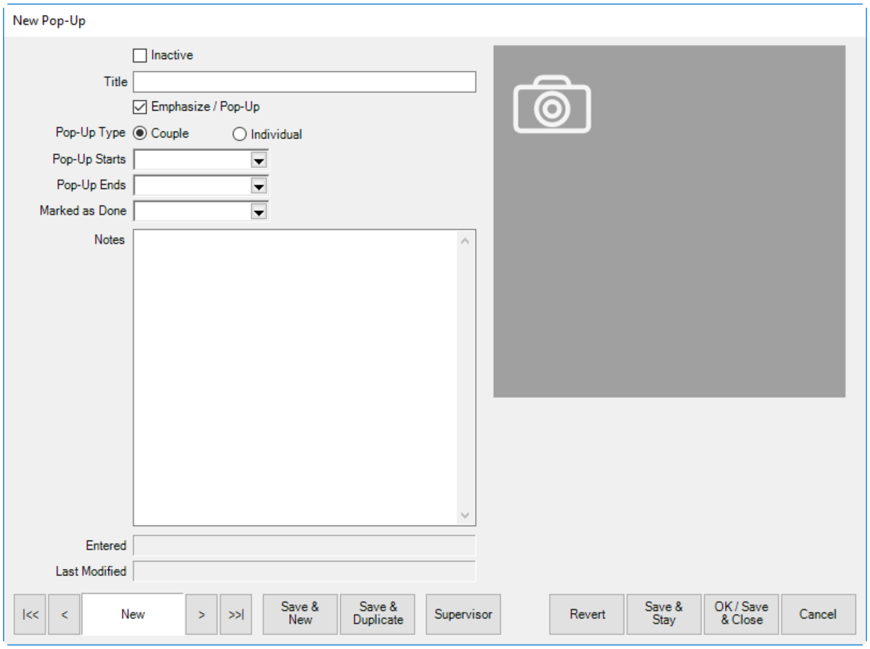
Entered	Who	Start	End	Done	Title
	Account Wide	8/16/2017	9/1/2017		Daughter's Birthday

Pop-ups are notices that appear at point of sale to remind associates to notify customers of messages. For example, it might prompt the associate that the customer's anniversary is coming up and that they may wish to look at a gift. Or it might be useful to prompt a customer about an item he had inquired about previously.

Fields and options in the **Pop-Up** tab include:

Entered	The date the pop-up was created; this is entered by The Edge.
Who	If a couple account, to whom the pop-up is applied.
Start	The date the pop-up is effective.
End	The date the pop-up should stop appearing.
Done	Whether the pop-up was addressed at point of sale.
Title	The name of the pop-up.
Add	Allows you to add a pop-up.
Edit	Allows you to edit an existing pop-up.
Delete	Allows you to delete a pop-up.
Inactive	Allows you to see pop-ups that have been marked inactive.

To create a pop-up, select **Add** from the **Pop-Ups** tab. The **New Pop-Up** window will appear.



☐ Inactive

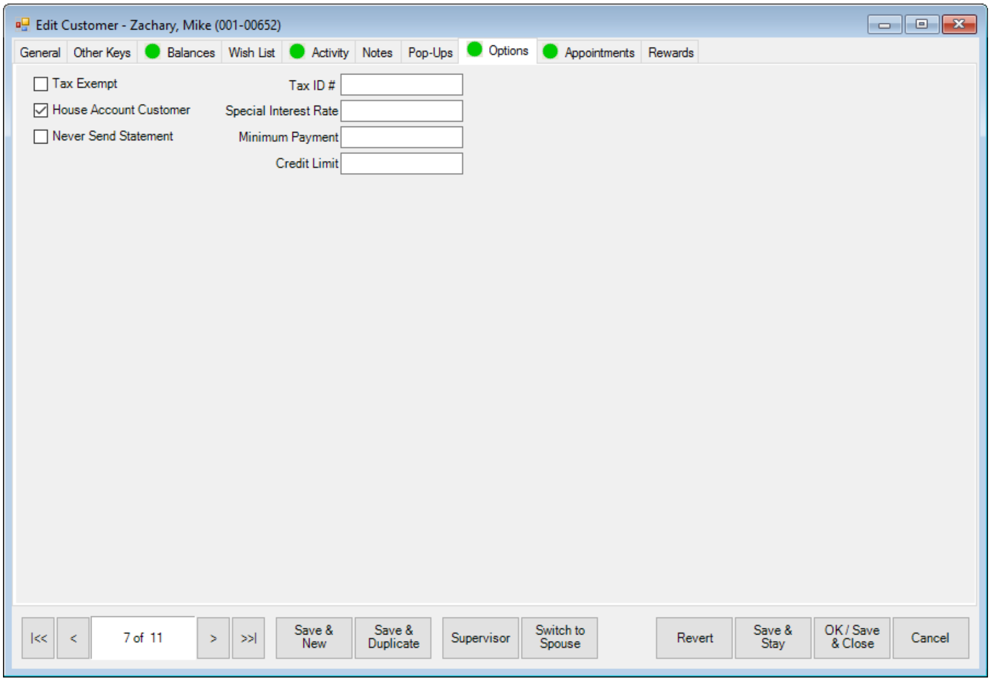
☑ Emphasize / Pop-Up

Pop-Up Type ● Couple ○ Individual

Fields and options in the **New Pop-Up** window include:

Inactive	Unlike **Delete**, **Inactive** stores a pop-up that is no longer used and is not visible in the list view unless you expressly select **Show Inactive**.
Title	A descriptive name for the pop-up.
Extra Emphasis/Pop-Up	Whether the pop-up should pop-up.
Pop-Up Type	Whether the pop-up should pop-up for just the individual customer or, if a couple account, both individuals.
Pop-Up Starts	When the pop-up should start popping up. If this is left blank, the pop-up will start immediately.
Pop-Up Ends	When the pop-up should stop popping up. If this is left blank, the pop-up will continue indefinitely.
Marked as Done	The date when the pop-up was resolved at point of sale by checking the **Do Not Show This Pop-Up Again** option at point of sale.
Notes	The content of the pop-up.
Entered	The date the pop-up was created.
Last Modified	The date, if any, the pop-up was last edited.

4.2.8 Options Tab



☐ Tax Exempt
☑ House Account Customer
☐ Never Send Statement

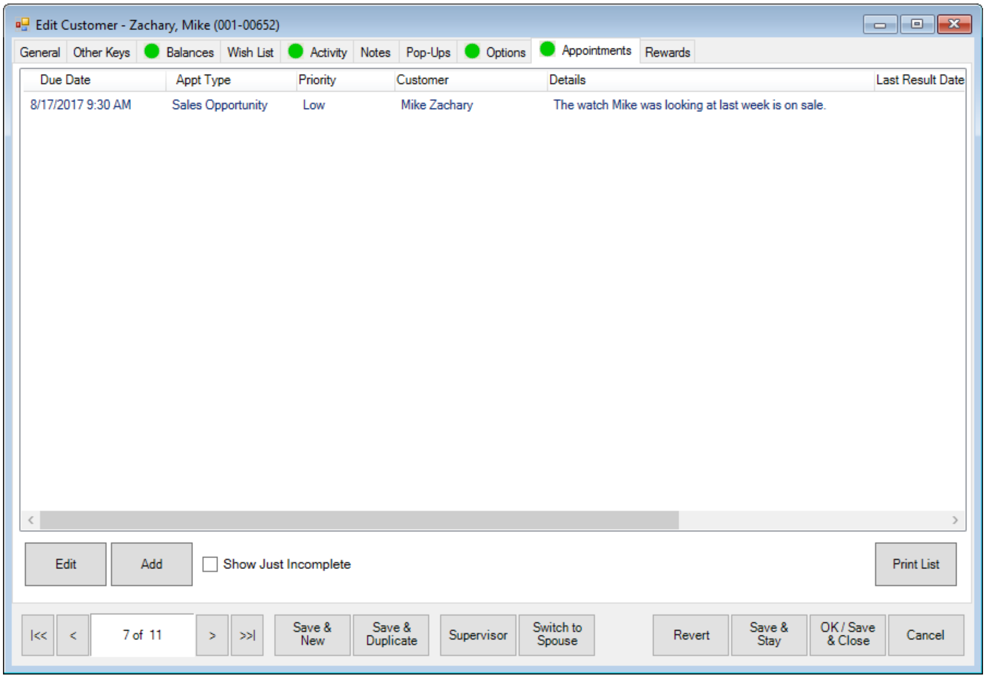
Tax ID #
Special Interest Rate
Minimum Payment
Credit Limit

Fields and options in the **Options** tab include:

Tax Exempt	Indicates whether the customer is tax exempt.
House Account Customer	Indicates whether the customer may use a store charge or house account.
Never Send Statement	Indicates whether the customer should receive statements of account.
Tax ID#	The customer's tax identification number. If you mark a customer tax-exempt, this is required and cannot be overridden.
Special Interest Rate	Specifies a special house account interest rate for this customer. This overrides the interest rate set in **System Options**.
Minimum Payment	The minimum payment for the customer's house account.
Credit Limit	The credit limit for the customer's house account.

For couples, all values will be shared for both parties except Tax Exempt and **Tax ID.**

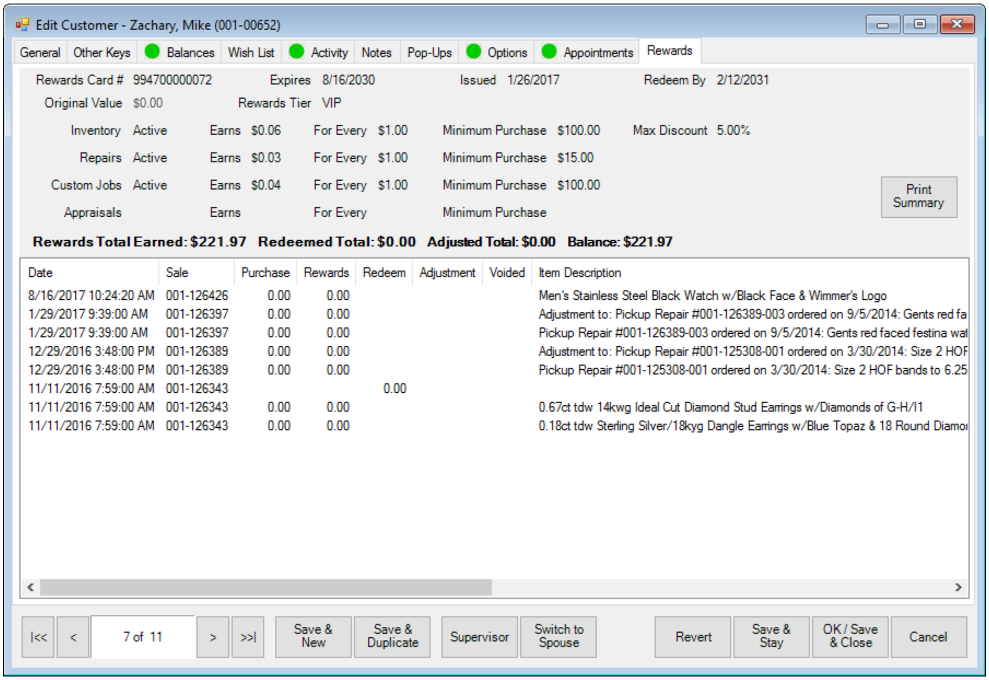
4.2.9 Appointments Tab



Due Date	Appt Type	Priority	Customer	Details	Last Result Date
8/17/2017 9:30 AM	Sales Opportunity	Low	Mike Zachary	The watch Mike was looking at last week is on sale.	

The **Appointments** tab lists appointment activity for the customer. You can edit (act on) appointments or add new ones. For more information, see the section entitled Appointments.

4.2.10 Rewards Tab



Rewards Card # 994700000072 Expires 8/16/2030 Issued 1/26/2017 Redeem By 2/12/2031
Original Value $0.00 Rewards Tier VIP

Inventory	Active	Earns	$0.06	For Every	$1.00	Minimum Purchase	$100.00	Max Discount	5.00%
Repairs	Active	Earns	$0.03	For Every	$1.00	Minimum Purchase	$15.00		
Custom Jobs	Active	Earns	$0.04	For Every	$1.00	Minimum Purchase	$100.00		
Appraisals		Earns		For Every		Minimum Purchase			

Rewards Total Earned: $221.97 Redeemed Total: $0.00 Adjusted Total: $0.00 Balance: $221.97

Date	Sale	Purchase	Rewards	Redeem	Adjustment	Voided	Item Description
8/16/2017 10:24:20 AM	001-126426	0.00	0.00				Men's Stainless Steel Black Watch w/Black Face & Wimmer's Logo
1/29/2017 9:39:00 AM	001-126397	0.00	0.00				Adjustment to: Pickup Repair #001-126389-003 ordered on 9/5/2014: Gents red fa
1/29/2017 9:39:00 AM	001-126397	0.00	0.00				Pickup Repair #001-126389-003 ordered on 9/5/2014: Gents red faced festina wa
12/29/2016 3:48:00 PM	001-126389	0.00	0.00				Adjustment to: Pickup Repair #001-125308-001 ordered on 3/30/2014: Size 2 HOF
12/29/2016 3:48:00 PM	001-126389	0.00	0.00				Pickup Repair #001-125308-001 ordered on 3/30/2014: Size 2 HOF bands to 6.25
11/11/2016 7:59:00 AM	001-126343			0.00			
11/11/2016 7:59:00 AM	001-126343	0.00	0.00				0.67ct tdw 14kwg Ideal Cut Diamond Stud Earrings w/Diamonds of G-H/I1
11/11/2016 7:59:00 AM	001-126343	0.00	0.00				0.18ct tdw Sterling Silver/18kyg Dangle Earrings w/Blue Topaz & 18 Round Diamo

The **Rewards** tab will only appear if you have rewards enabled in **System Options** and if the customer has a rewards card. Fields and options in the **Rewards** tab include:

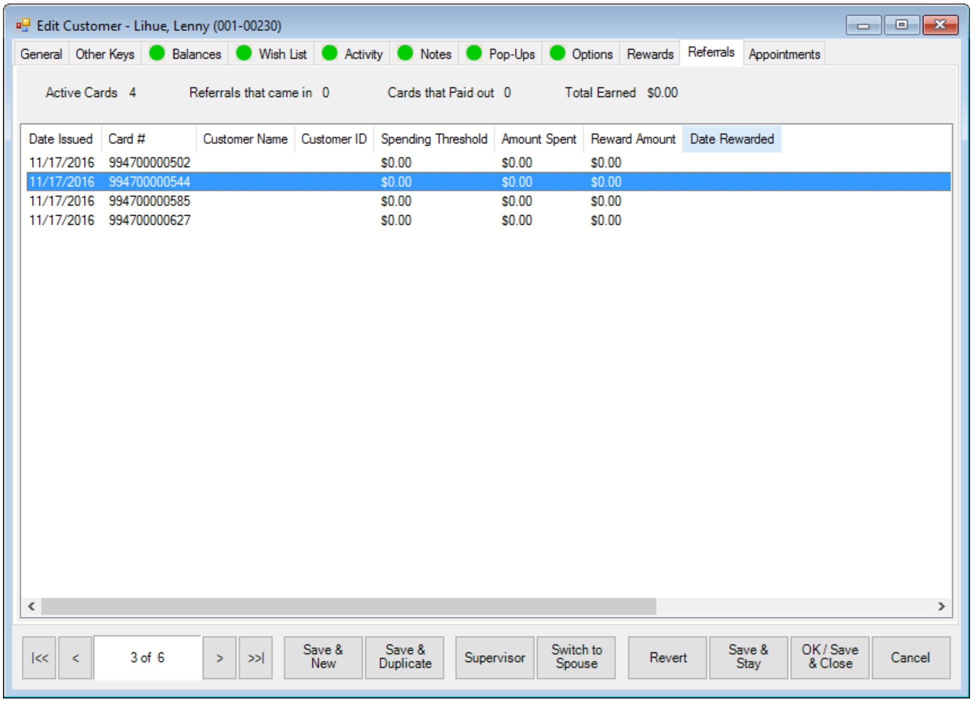
Rewards Card #	The unique identifier of the card.
Expires	When the card expires.
Issued	When the card was issued.
Redeem By	By when the rewards must be used.
Original Value	The value initially assigned to the card.
Rewards Tier	The tier assigned to the card.
Inventory	
Active	Whether rewards will accrue for inventory.
Earns	The amount per dollar spent in the store the customer will earn.
Minimum Purchase	The minimum amount a purchase must be to accrue rewards.
Repairs	
Active	Whether rewards will accrue for repairs.
Earns	The amount per dollar spent on repairs the customer will earn.

Minimum Purchase	The minimum amount a repair must be to accrue rewards.
Custom Jobs	
Active	Whether rewards will accrue for custom jobs.
Earns	The amount per dollar spent on custom jobs the customer will earn.
Minimum Purchase	The minimum amount a custom job must be to accrue rewards.
Appraisals	
Active	Whether rewards will accrue for appraisals.
Earns	The amount per dollar spent on appraisals the customer will earn.
Minimum Purchase	The minimum amount an appraisal must be to accrue rewards.
Print Summary	Allows you to print a summary of these parameters.

For couples, rewards credits are blended onto one reward balance.

For more on working with rewards and referrals, see the section entitled Rewards Program.

4.2.11 Referrals Tab



Active Cards 4 Referrals that came in 0 Cards that Paid out 0 Total Earned $0.00

Date Issued	Card #	Customer Name	Customer ID	Spending Threshold	Amount Spent	Reward Amount	Date Rewarded
11/17/2016	994700000502			$0.00	$0.00	$0.00	
11/17/2016	994700000544			$0.00	$0.00	$0.00	
11/17/2016	994700000585			$0.00	$0.00	$0.00	
11/17/2016	994700000627			$0.00	$0.00	$0.00	

The **Referrals** tab will only appear if you have referrals enabled and when the customer has referral cards to hand out. Fields and options in the **Referrals** tab include:

Active Cards	The number of active cards the customer has to hand out to friends and family.
Referrals that Came In	The number of new customers who came in to use the referring customer's cards.
Cards that Paid Out	The number referral cards that generated a reward credit.
Total Earned	The amount the referring customer earned in referral bonus money.

4.3 Customer Supervisor Menu

4.3.1 Disable Customer

Found in the **Supervisor** menu at the bottom of the customer record, **Disable Customer** allows you to mark a customer record as inactive. It does not delete transactions with this customer. You will be prompted to confirm the action.

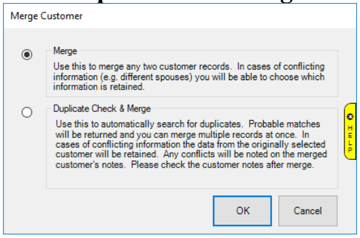
4.3.2 Merge Customer

This feature is used to merge customer records. This is useful if you have duplicate customer records, either because of accidental entry or as the result of a data conversion. It contains two functions: **Merge Customer** and **Duplicate Check & Merge**.

Merge Customer	Use this to merge any two customer records. In cases of conflicting information (e.g. different spouses) you will be able to choose which information is retained.
Duplicate Check & Merge	Use this to automatically search for duplicates. Probable matches will be returned and you can merge multiple records at once. In cases of conflicting information the data from the originally selected customer will be retained. Any conflicts will be noted on the merged customer's notes. Please check the customer notes after merge.

To use **Merge Customer**:

1. Click **Customer** ► **Find**, search for the customer you wish to keep, and **Edit** the record.
2. Click **Supervisor** ► **Merge**. The **Merge Customer** window will appear.



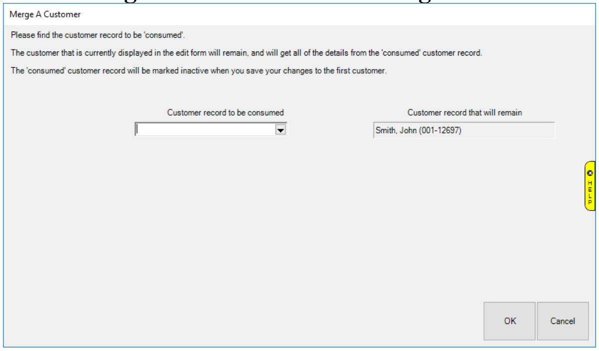
● Merge

Use this to merge any two customer records. In cases of conflicting information (e.g. different spouses) you will be able to choose which information is retained.

○ Duplicate Check & Merge

Use this to automatically search for duplicates. Probable matches will be returned and you can merge multiple records at once. In cases of conflicting information the data from the originally selected customer will be retained. Any conflicts will be noted on the merged customer's notes. Please check the customer notes after merge.

3. Select **Merge** and click **OK**. The **Merge A Customer** window will appear.



Merge A Customer

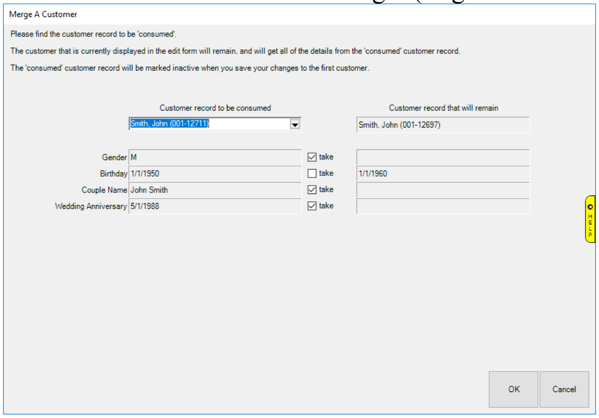
Please find the customer record to be 'consumed'.

The customer that is currently displayed in the edit form will remain, and will get all of the details from the 'consumed' customer record.

The 'consumed' customer record will be marked inactive when you save your changes to the first customer.

Customer record to be consumed	Customer record that will remain
	Smith, John (001-12697)

4. Use the drop-down under **Customer record to be consumed** to open the customer filter.
5. Enter criteria to search for a customer and click **OK**. A list of matching customers will appear.
6. Click the customer you want to merge and click **Select**. The **Merge A Customer** window will appear showing the customer to be consumed on the left (customer you just selected) and the customer that will remain on the right (original customer you edited).



Merge A Customer

Please find the customer record to be 'consumed'.

The customer that is currently displayed in the edit form will remain, and will get all of the details from the 'consumed' customer record.

The 'consumed' customer record will be marked inactive when you save your changes to the first customer.

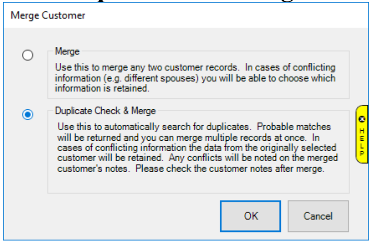
	Customer record to be consumed		Customer record that will remain
	Smith, John (001-12711)		Smith, John (001-12697)
Gender	M	☑ take	
Birthday	1/1/1950	☐ take	1/1/1960
Couple Name	John Smith	☑ take	
Wedding Anniversary	5/1/1988	☑ take	

7. Any information present on the record for each will be displayed. Use the checkboxes to indicate which info to **take** from the consumed record. This information will be copied to the remaining customer and will overwrite whatever was there.
8. Click **OK** and then save your customer to complete the merge.

Check your work carefully because customer merge cannot be undone.

To use **level Check & Merge**:

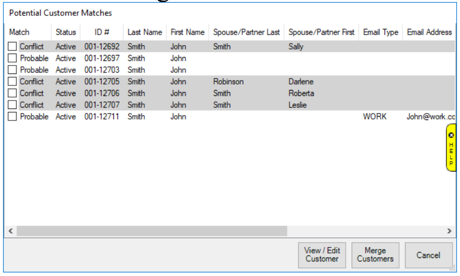
1. Click **Customer ► Find**, search for the customer you wish to keep, and **Edit** the record.
2. Click **Supervisor ► Merge**. The **Merge Customer** window will appear.



○ Merge
Use this to merge any two customer records. In cases of conflicting information (e.g. different spouses) you will be able to choose which information is retained.

● Duplicate Check & Merge
Use this to automatically search for duplicates. Probable matches will be returned and you can merge multiple records at once. In cases of conflicting information the data from the originally selected customer will be retained. Any conflicts will be noted on the merged customer's notes. Please check the customer notes after merge.

3. Select **Duplicate Check & Merge** and click **OK**. The database will search for duplicates and either return a message that none were found or display a list of probable matches.



Match	Status	ID #	Last Name	First Name	Spouse/Partner Last	Spouse/Partner First	Email Type	Email Address
☐ Conflict	Active	001-12692	Smith	John	Smith	Sally		
☐ Probable	Active	001-12697	Smith	John				
☐ Probable	Active	001-12703	Smith	John				
☐ Conflict	Active	001-12705	Smith	John	Robinson	Darlene		
☐ Conflict	Active	001-12706	Smith	John	Smith	Roberta		
☐ Conflict	Active	001-12707	Smith	John	Smith	Leslie		
☐ Probable	Active	001-12711	Smith	John			WORK	John@work.cc

4. Check one or more customer records and click **Merge Customers** to merge them. Note this merge happens immediately and cannot be undone.
5. Any row marked **Conflict** indicates your originally selected customer did not have a spouse listed, but these probable matches do. If you select one, the spouse will be added when you complete merge. If you select multiple records with different spouses, the software will pop the **Spouse Selector** window asking you to pick which one will remain on the merged record.

The System Option "Customer Duplicate Check" determines what information The Edge matches duplicates on. It is in the Customer Options section.

Customer Merge cannot be undone. Please verify you have selected the correct customers BEFORE you click Merge Customers.

4.3.3 Remove Spouse

Removes the spouse/partner, but keeps the spouse/partner's record independently. There is a System Option, **Balances to Primary on Split**, that dictates how historical transactions will be assigned during this process. Setting this to `True` indicates that all transactions conducted by the couple will be assigned to the primary account holder.

Setting this to `False` indicates that transactions will be assigned based on the party to act on the transaction. Here are the scenarios:

- If the transaction is a sale only, it stays with individual who conducted it.
- If the transaction has an intake step such as in repairs, special orders, custom jobs, appraisals, layaways, and memos, and no activity occurs on that transaction by the primary account holder, then the transaction stays with the individual. For instance, a repair intake is done by the spouse/partner and pickup is done by primary, that sale will go to the primary account holder.
- If it is a house or credit transaction, the sale will remain with the individual.
- Any house or credit or sales activity on a sale the changes to the primary account holder will also be assigned to the primary account holder.

The anniversary and spouse/partner's birthday will remain; it you want that removed, do so manually.

4.3.4 Set as Primary Customer

If you wish to change which person in the couple is the primary account holder:

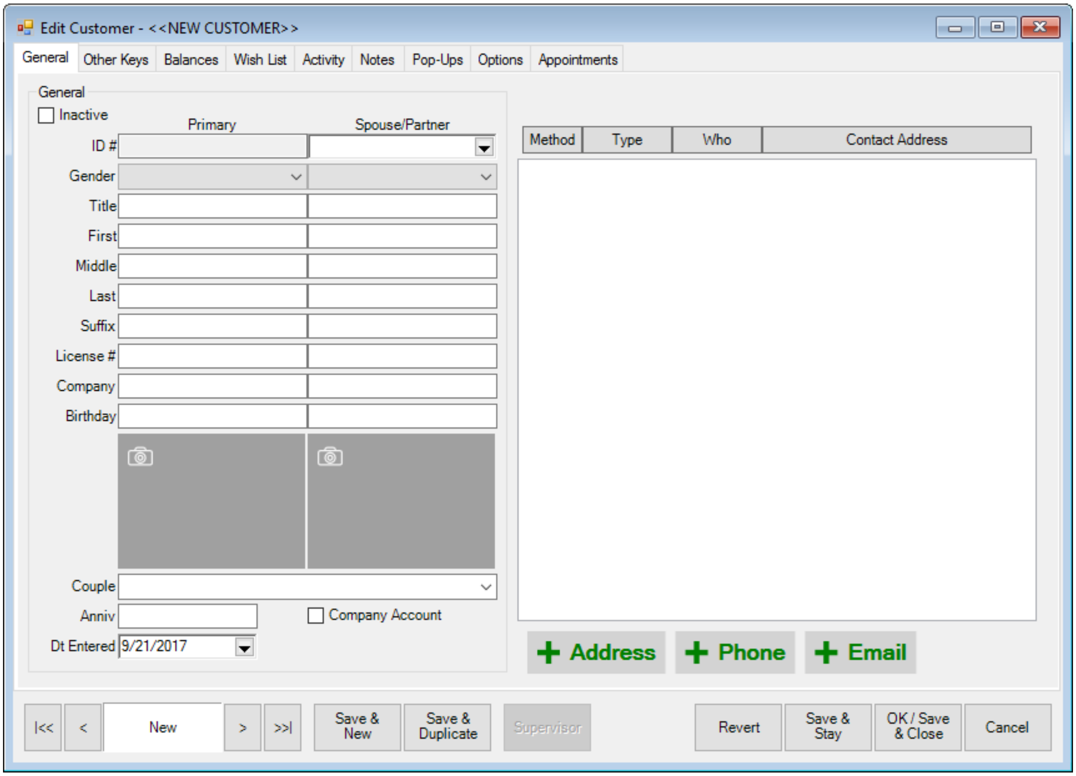
1. Use **Switch to Spouse** from the **General** tab to move **Spouse/Partner** to the left side of the **General** tab.
2. From the **Supervisor** menu, Select **Set as Primary Customer**.

4.4 Adding a Customer

In The Edge new customers will primarily be entered using the **Point of Sale** window as described in the section entitled Gathering Customer Information at Point-of-Sale. Alternatively, and to include more detailed data, you can use this **Add New Customer** function. This method will take longer, but will allow you to include much more detail. Required fields are determined by your **System Options**.

To add a new customer to your Edge database:

1. Select the **Add** tab from the **Customer** menu. The **Edit Customer <<New Customer>>** window will appear with the **General** tab selected.

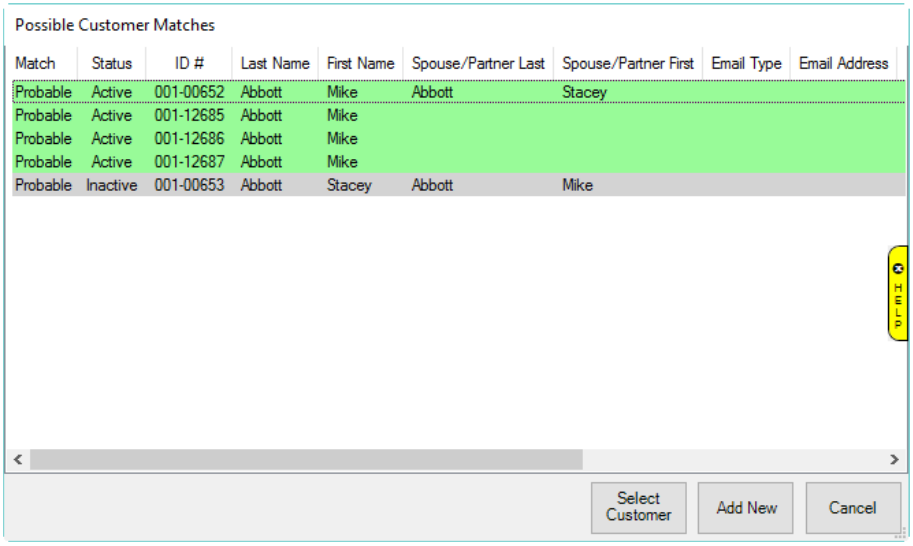


Dt Entered 9/21/2017

2. Populate the fields in each tab as described in the section entitled Working with Customer Records.
3. Select a save option.

Depending on your **System Options**, The Edge may check to see if there is a similar record before proceeding with creating a new one or creating a new spouse record. If there is record in The Edge that is similar:

1. The **Possible Customer Matches** screen will appear with a listing of possible and probable matching records.

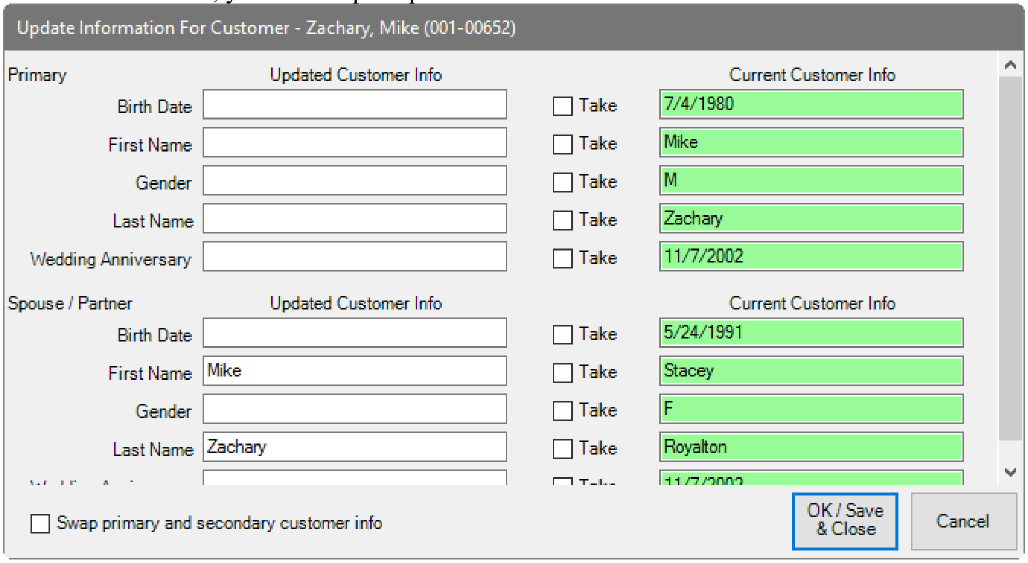


Possible Customer Matches

Match	Status	ID #	Last Name	First Name	Spouse/Partner Last	Spouse/Partner First	Email Type	Email Address
Probable	Active	001-00652	Abbott	Mike	Abbott	Stacey		
Probable	Active	001-12685	Abbott	Mike				
Probable	Active	001-12686	Abbott	Mike				
Probable	Active	001-12687	Abbott	Mike				
Probable	Inactive	001-00653	Abbott	Stacey	Abbott	Mike		

2. From here, choose from one of two options: select a customer from the list or add a new customer record based on the data entered to date.

    a. If the desired customer appears in the list, select the record and **Select Customer**.
    b. You will be prompted to confirm your selection, and any information you added to that point will be incorporated with the existing record.
    c. If there is a conflict, you will be prompted to choose the correct data.



Update Information For Customer - Zachary, Mike (001-00652)

Primary	Updated Customer Info		Current Customer Info
Birth Date		☐ Take	7/4/1980
First Name		☐ Take	Mike
Gender		☐ Take	M
Last Name		☐ Take	Zachary
Wedding Anniversary		☐ Take	11/7/2002

Spouse / Partner	Updated Customer Info		Current Customer Info
Birth Date		☐ Take	5/24/1991
First Name	Mike	☐ Take	Stacey
Gender		☐ Take	F
Last Name	Zachary	☐ Take	Royalton

☐ Swap primary and secondary customer info

   d. Check **Take** to copy the **Updated Customer Information** into the existing record and delete **Current Customer Information**. In this example, it would delete a good deal of data.
   e. Select **Swap primary and secondary customer info** to make the spouse/partner be the primary account holder.
   f. Select **OK/Save and Close**; the record will be saved.

3. Notice that inactive customer records are highlighted in gray. If you select one of those, you will be prompted to make the record active.
4. If the desired customer is not one of the possible matches, select **Add New** and complete the entry.

This feature will help you avoid creating duplicate customer records, but you might also search for the customer before adding him. If no match is found, use the Add button from the resulting customer list window. This will auto-fill your search criteria into the appropriate fields. For example, if you searched for customer Woodrow Wilson and found nothing, press the Add button would automatically fill in the first name field with Woodrow and the last name field with Wilson.

Wish List, Activity, and Balances tabs do not apply to new customers.

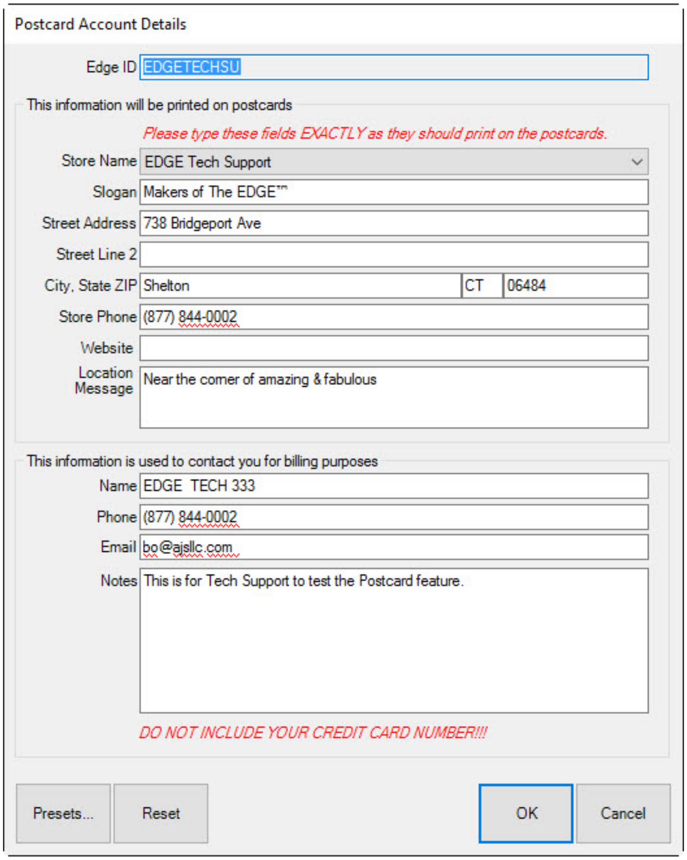
4.5 Customer Postcards

The Edge Postcard feature provides a means to select from a variety of attractive postcard designs, choose the criteria for customer to whom the postcards should be mailed, preview the mailing list before the postcard order is placed, select/deselect certain customers, and send the postcard order to our online printing service. The postcards are then printed, personalized, postage paid, and mailed, all without any further attention from you. This Edge feature provides you with a very affordable, personalized and easy-to-use marketing retention program that will build customer loyalty and drive business.

4.5.1 Entering Store Information for Postcards

To register for postcards:

1. Select **Postcards ► My Account**. The **Postcard Account Details** window will appear.



Edge ID EDGETECHSU

This information will be printed on postcards

Please type these fields EXACTLY as they should print on the postcards.

Store Name EDGE Tech Support

Slogan Makers of The EDGE™

Street Address 738 Bridgeport Ave

Street Line 2

City, State ZIP Shelton CT 06484

Store Phone (877) 844-0002

Website

Location Message Near the corner of amazing & fabulous

This information is used to contact you for billing purposes

Name EDGE TECH 333

Phone (877) 844-0002

Email bo@ajsllc.com

Notes This is for Tech Support to test the Postcard feature.

DO NOT INCLUDE YOUR CREDIT CARD NUMBER!!!

Fields and options in the **Postcard Account Details** window include:

EdgeID	The Edge-generated ID for your postcard account. When you do a postcard mailing, this is the account to be charged. It is attached to your license.
Store Name	The store from which the cards will be sent; this is for printing purposes.
Slogan	A slogan to appear on the postcard.
Street Address	The address of the store as it should appear on the postcard.
Street Line 2	The second portion of the street address of the store if needed.
City, State ZIP	The city, state and ZIP Code for the store as it should appear on the postcard.
Store Phone	The store's phone number as it should appear on the postcard.
Website	The website that should appear on the postcard.
Location Message	Any tips to provide the recipient: On the corner of Main and Elm.

The details provided in the top half of the Postcard window will be used to populate the postcard design you select later.

Name	The name of the person to contact for billing purposes.
Phone	The store's phone number to be used for billing purposes.
Email	The store's email address to be used for billing purposes.
Notes	Notes for the account.

2. Enter your store information and select **OK**. Much of this information will be pre-filled for you based on your store’s license.
3. Your account status will change to **Pending** and soon thereafter an account manager will contact you to get your payment information and to obtain your logo files.

For postcard designs, two logo files will be required: one in white for dark backgrounds and one in black for light backgrounds. We strongly recommend .EPS Vector files, but other formats may be acceptable. If you cannot supply acceptable logo files, a service is available.

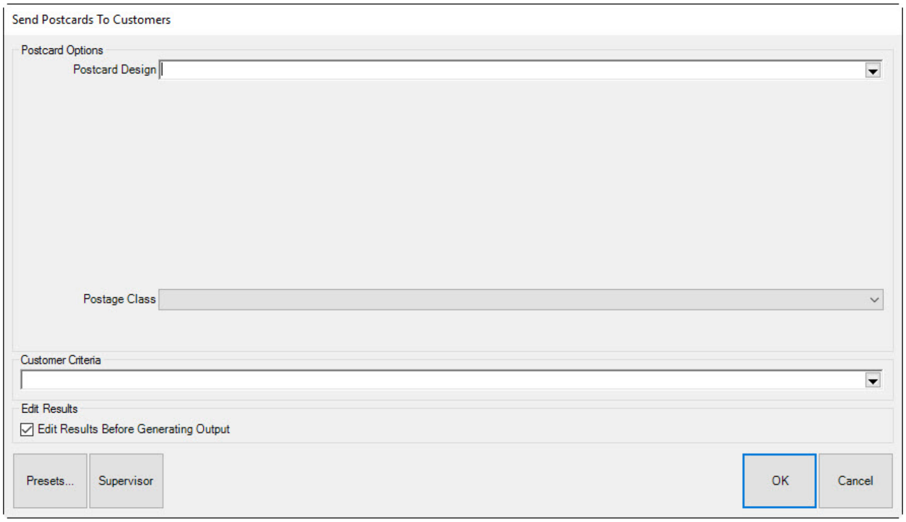
4. You will be notified by email once your account has been activated.

Once your postcard account is activated, you can get back to your account settings via Supervisor ► My Account.

4.5.2 Sending Out (Ordering) Postcards

To begin sending postcards:

1. Select **Postcards** ► **Order Now** from the **Customer** function menu. The **Send Postcards to Customers** window will appear.

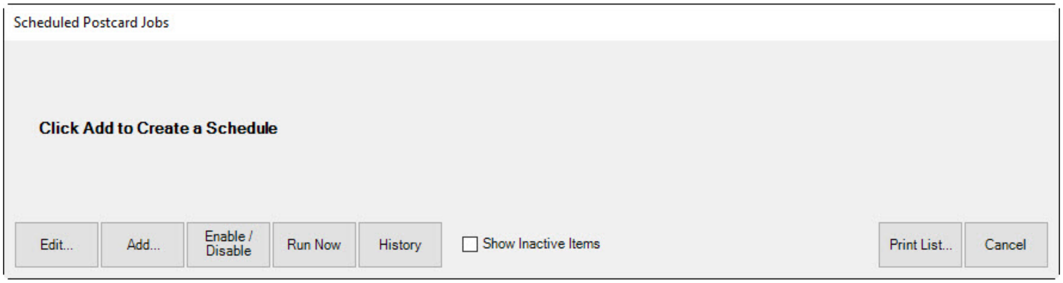


2. Select the desired postcard design from the **Postcard Design** dropdown list. For a current list of available postcard designs along with previews, go to www.edgeuser.com.
3. Enter the **Offer** and **Disclaimer**. Depending on the design chosen, these fields control the custom text available on the card.
4. Select your postage class.
5. Use the **Customer Criteria** drop-down, which offers the customer find filter.
6. Select **OK** to generate a list of matching customers.
7. Check those customers you wish to include in your postcard mailing and select **OK** to submit it via the Internet.

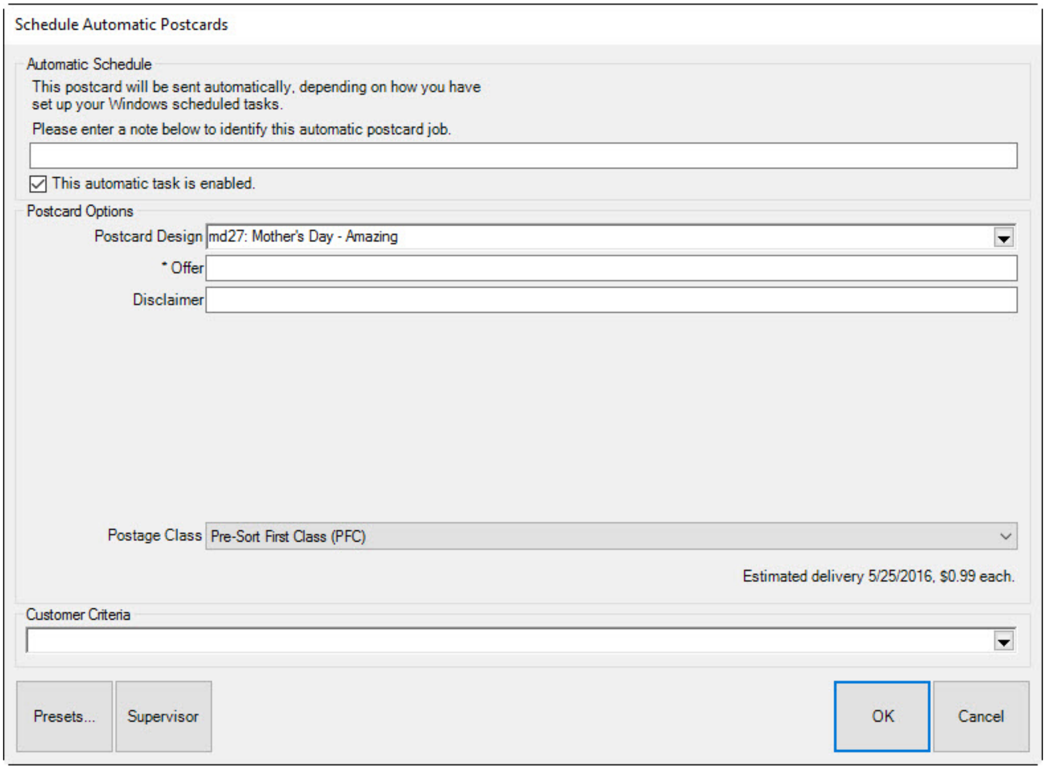
4.5.3 Scheduling Postcards

Schedule is where you specify which postcards are to be generated each week. To configure a job:

1. Select **Customer** ► **Postcards** ► **Schedule**. The **Scheduled Postcard Jobs** list window will appear. The first time you see it, it will be empty.



2. Click **Add** to specify a postcard job. The **Schedule Automatic Postcards** window will appear.



This postcard will be sent automatically, depending on how you have set up your Windows scheduled tasks.

Please enter a note below to identify this automatic postcard job.

☑ This automatic task is enabled.

Postcard Design: md27: Mother's Day - Amazing

* Offer

Disclaimer

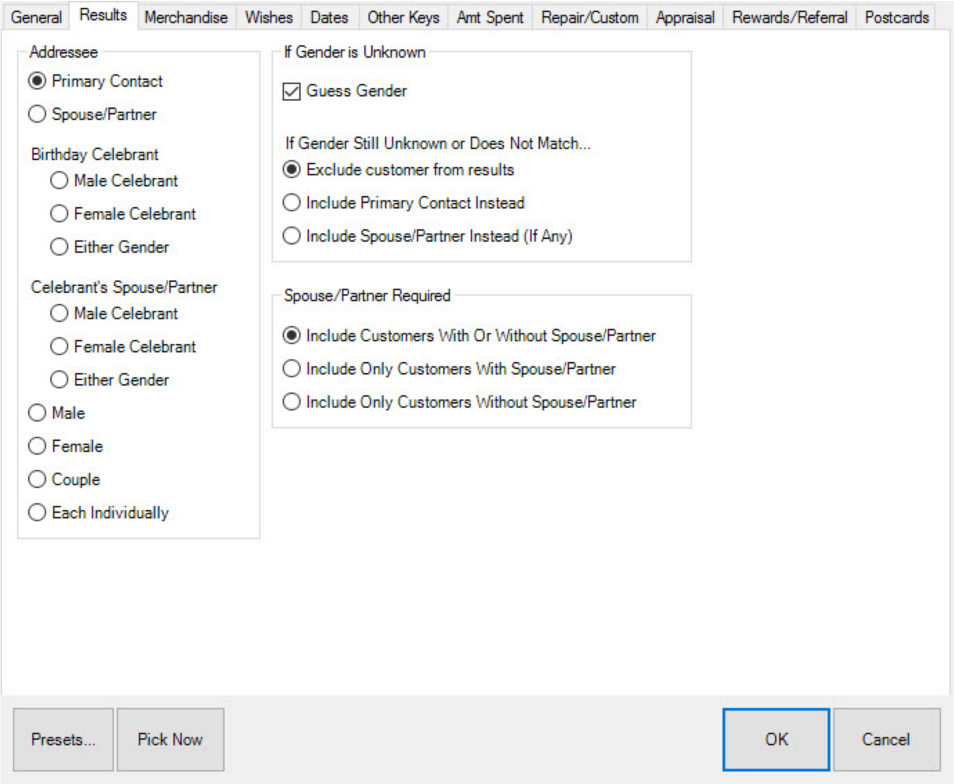
Postage Class: Pre-Sort First Class (PFC)

Estimated delivery 5/25/2016, $0.99 each.

The **Schedule Automatic Postcards** window strongly resembles the **Order Now** functionality, with the addition of a new field to specify an identifying note or comment and a checkbox by which you can enable or disable the automatic nature of the job.

3. Enter a descriptive name for the mailing.
4. Select a **Postcard Design**. Based on the design you choose, the **Customer Criteria** field will be populated for you and will appear in the filter **Results** tab, discussed later. See step 8 for more information.

5. Enter the promotion or greeting in the **Offer** field. You can provide a discount or simply say, “Happy Birthday.”
6. Enter a disclaimer if desired. For example, you may wish to limit the length of the offer or exclude a particular category.
7. Select a postage class.
8. From the **Customer Criteria** area, complete the parameters around which to generate the mailing. The **Customer Criteria** filter works just like customer find. Go through each tab and narrow your target audience. Let’s call attention to the **Results** tab. Notice that many selections are made based on the postcard design you selected in step 4.



Addressee
● Primary Contact
○ Spouse/Partner

Birthday Celebrant
○ Male Celebrant
○ Female Celebrant
○ Either Gender

Celebrant's Spouse/Partner
○ Male Celebrant
○ Female Celebrant
○ Either Gender

○ Male
○ Female
○ Couple
○ Each Individually

If Gender is Unknown
☑ Guess Gender

If Gender Still Unknown or Does Not Match...
● Exclude customer from results
○ Include Primary Contact Instead
○ Include Spouse/Partner Instead (If Any)

Spouse/Partner Required
● Include Customers With Or Without Spouse/Partner
○ Include Only Customers With Spouse/Partner
○ Include Only Customers Without Spouse/Partner

9. Filter further only if required.
10. Select the **Dates** tab and filter by the date of the event.
11. Select **Presets**.
12. Select **Save Settings**. Enter a name for the preset settings. For more about presets, see the section entitled Recommended Postcard Presets.
13. Select **OK**.

- **It is important to remember that each automatic postcard job will run each and every week, so each of your jobs should include customer criteria with a date range of 7 days. The Rolling Dates feature allows you to set a minimum and maximum number of days, weeks, months, quarters, or years from the date of the job. Note that a week in The Edge is Sunday to Saturday.**
- **For example, if you are setting up an automatic mailing function, and you wish to always send cards 3 weeks in advance of an event, you would specify rolling weeks to Min 3/Max 3. This way, the job will look and find any event 3 weeks ahead. It will include associated targets that match within a week.**
- **You should select the exact range based on your chosen postage class and your knowledge of your customer base.**

4.5.4 Recommended Postcard Presets

Presets in The Edge allow you to save filters and settings for future use. For the Auto Postcard function, they are particularly helpful because they allow you define mailing parameters for repeated use. For example, if you want to send postcards to men with anniversaries in the next month, you can set those filters and save them. We recommend weekly female birthday, weekly male birthday, weekly anniversary, weekly "Thank You," weekly service reminders. Therefore, when you are done setting the filter, select **Presets** to save the settings.

Using the filtering steps described in the section entitled Scheduling Postcards, the following table outlines the settings for each of the recommended presets.

Occasion	Postcard Design	Celebrant/ Target	Dates	Customer Field to Select
Female Birthday	Birthday Female Postcards	Female	Rolling 3 weeks in advance	Birthday
Male Birthday	Birthday Male Postcards	Male	Rolling 3 weeks in advance	Birthday
Anniversary	Anniversary Cards	Couple	Rolling 4 weeks in advance	Anniversary
Thank You	Thank You card	Primary Contact	Rolling 2 weeks before	Merchandise tab: set a dollar amount spent
Service Reminder	Service Reminder Card	Primary Contact	Rolling 26 weeks before	Merchandise tab: set dollar amount spent

4.5.5 Importing Existing Postcard Presets

1. Select **Customer ► Postcards ► Schedule**. Once you clear security, the Scheduled Postcard Jobs window will appear. The first time you see it, it will be empty.
2. Click **Add** to specify a postcard job. The **Schedule Automatic Postcards** window will appear.

The **Schedule Automatic Postcards** window strongly resembles the **Order Now** functionality, with the addition of a new field to specify an identifying note or comment, and a checkbox by which you can enable or disable the automatic nature of the job. This option can be disabled if a job is not to be run for a period of time.

3. Select **Presets** and from the context menu, select **Load Settings**.
4. From the **Load Settings** window, select the **Show Similar** checkbox.
5. Select the preset that you want to import and select **OK**.
6. Enter a name for the mailing.

4.5.6 Running Postcard Jobs

If you have properly set up both The Edge and Windows Scheduled Tasks, then your jobs will each run automatically.

If something goes wrong with the automated mailing, or if you want to run an addition mailing, you can run the job again manually using the **Run Now** button. In this case, do not go through the Windows Scheduler because that will result in duplicate automated mailings. In this case, go into The Edge, go to the list of scheduled postcards, and run just that batch using **Run Now**.

Important!

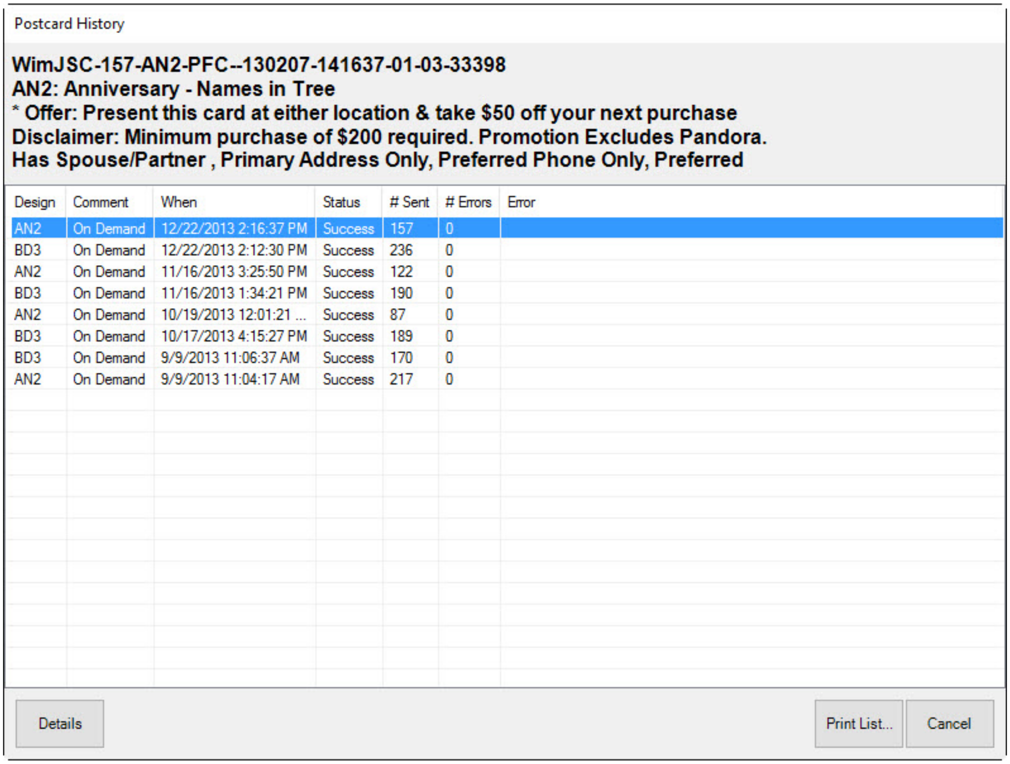
Selecting Run Now will not prevent the postcard job from running as scheduled automatically as well, and might very well result in some customers receiving duplicate postcards at extra cost to you. You should only use the Run Now button if you know that the automatic job failed. For this reason, the Run Now button requires a supervisor override.

For more about Windows scheduled tasks, see the tip sheet entitled Setting Up a Windows Task at www.EdgeUser.com.

4.5.7 Postcard History

To see a history of postcards sent to your customers:

1. From the **Customer** menu, select **Postcards ► History**. The **Postcard History** window will appear.



WimJSC-157-AN2-PFC--130207-141637-01-03-33398
AN2: Anniversary - Names in Tree
*** Offer: Present this card at either location & take $50 off your next purchase**
Disclaimer: Minimum purchase of $200 required. Promotion Excludes Pandora.
Has Spouse/Partner , Primary Address Only, Preferred Phone Only, Preferred

Design	Comment	When	Status	# Sent	# Errors	Error
AN2	On Demand	12/22/2013 2:16:37 PM	Success	157	0	
BD3	On Demand	12/22/2013 2:12:30 PM	Success	236	0	
AN2	On Demand	11/16/2013 3:25:50 PM	Success	122	0	
BD3	On Demand	11/16/2013 1:34:21 PM	Success	190	0	
AN2	On Demand	10/19/2013 12:01:21 ...	Success	87	0	
BD3	On Demand	10/17/2013 4:15:27 PM	Success	189	0	
BD3	On Demand	9/9/2013 11:06:37 AM	Success	170	0	
AN2	On Demand	9/9/2013 11:04:17 AM	Success	217	0	

2. From here you can view details of a mailing, including the number of recipients, or print the list.

4.5.8 Postcard Multi-Store Considerations

A scheduled task will automatically run only in the store where it was created, even though the scheduled task definition will be transferred to the other stores. However, you can interactively **run now** any scheduled task.

Postcards should be sent from one store. If you have multiple stores, and you want to generate automatic postcards from each store (e.g., you want your postcards to have different return addresses), contact postcards@ajsllc.com.

4.5.9 Best Practices for Customer Postcards

It's important to note that effective use of the Auto Postcard function hinges on good customer list maintenance. If customer birthdays are wrong or if a customer has changed his address, you could offend someone or at least, waste the cost of the card and postage. We recommend the following best practices:

1. When adding anything to the schedule, please remember that these cards go out WEEKLY, not monthly. Therefore, anything you want to add to the schedule should be scheduled according to what timeframe you want it to hit mailboxes.
2. You can preview the cards that are scheduled to go out that week, any day from a Monday to a Thursday before 11:00 p.m. by going to **Customer ►Find ► Load Settings** and choose which postcard you want to preview and highlight it. Select **OK** and then **OK** once more.
3. When you close up for the day, DO NOT TURN OFF YOUR PC, SERVER, OR ANY COMPUTER THAT WE SET UP THE TASK ON, usually on Thursday evenings. You can put it to sleep but do not turn it off. If you do the cards will not run and will not be ordered.
4. If you change an admin password on your server PC and the password is not changed in the task, your cards will not go out.
5. Periodically, at least twice a year, review your customer database to ensure the accuracy of your information.
6. Occasionally do a manual filter of customers using the same filters of your postcard presets and view the results to ensure the list matches your desired results.
7. Train your staff to take a moment with customers to review their information whenever they come into the store.

If you need any assistance with setting up your Automatic Postcard Scheduler or presets for postcards, please call us at 1-866-580-3343 x 9903 or email us at service@ajsllc.com.

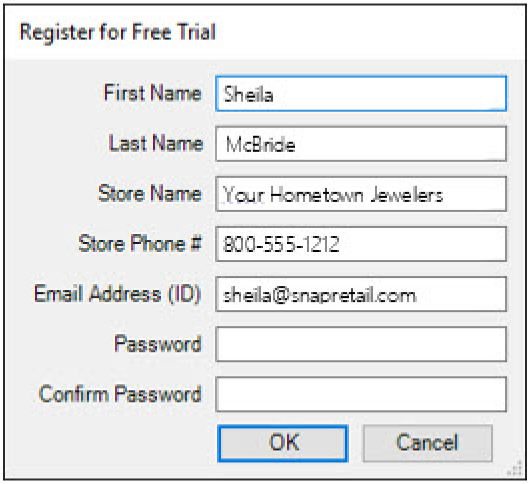
4.6 SnapRetail Integration

SnapRetail offers targeted customer contact in the form of email and social media. Because The Edge is now integrated with SnapRetail, you can easily upload your Edge customer lists to SnapRetail for easy, consistent, and on-going customer promotions. For more information about what SnapRetail can do for you, go to www.snapretail.com.

4.6.1 SnapRetail Free Trial

If you're new to SnapRetail and want to give it a try, get started by registering through The Edge:

1. Select **Customer ►SnapRetail ►Free Trial**. The **Register for Free Trial** window will appear.

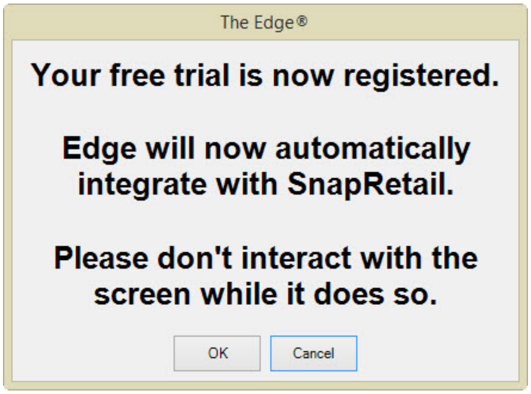


Register for Free Trial

First Name: Sheila
Last Name: McBride
Store Name: Your Hometown Jewelers
Store Phone #: 800-555-1212
Email Address (ID): sheila@snapretail.com
Password:
Confirm Password:

The Edge will populate many of the fields based on your license. You may change them if you like.

2. In the **Password** field, create a password for your SnapRetail account.
3. To ensure accuracy, re-enter the same password in the **Confirm Password** field.
4. Make notes of the email address and password used here. They will be your SnapRetail credentials.
5. Select **OK**. The Edge will then automatically create your SnapRetail trial account and integrate it with your Edge license by automating a web browser window. Please do not interact with the web browser window; it will disappear once integration is complete. If an error occurs, the web browser window will remain visible so that you can take appropriate action.

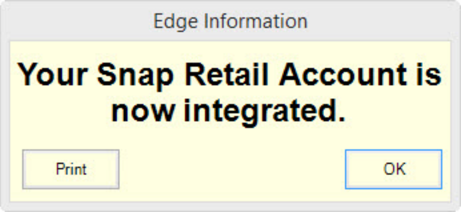


Your free trial is now registered.

Edge will now automatically integrate with SnapRetail.

Please don't interact with the screen while it does so.

6. Select **OK**. Your account will be created and it will be integrated with your Edge license. When integration is complete, a confirmation window will appear.

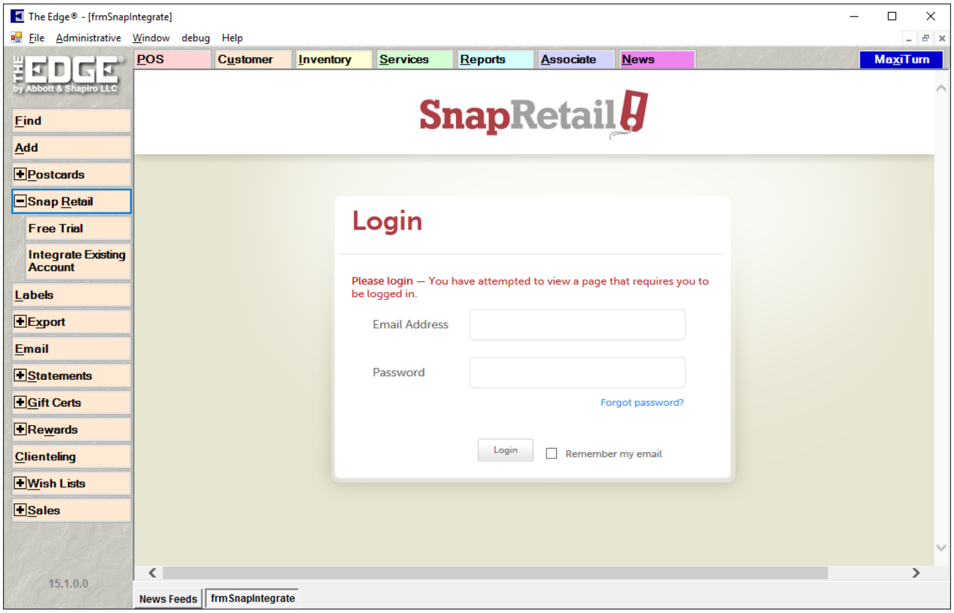


Your Snap Retail Account is now integrated.

4.6.2 SnapRetail Integrating an Existing Account

If you already have a SnapRetail account, you need only integrate it with your Edge license:

1. Select **Customer** ►**SnapRetail** ►**Integrate Existing Account**. You'll be prompted to log in.



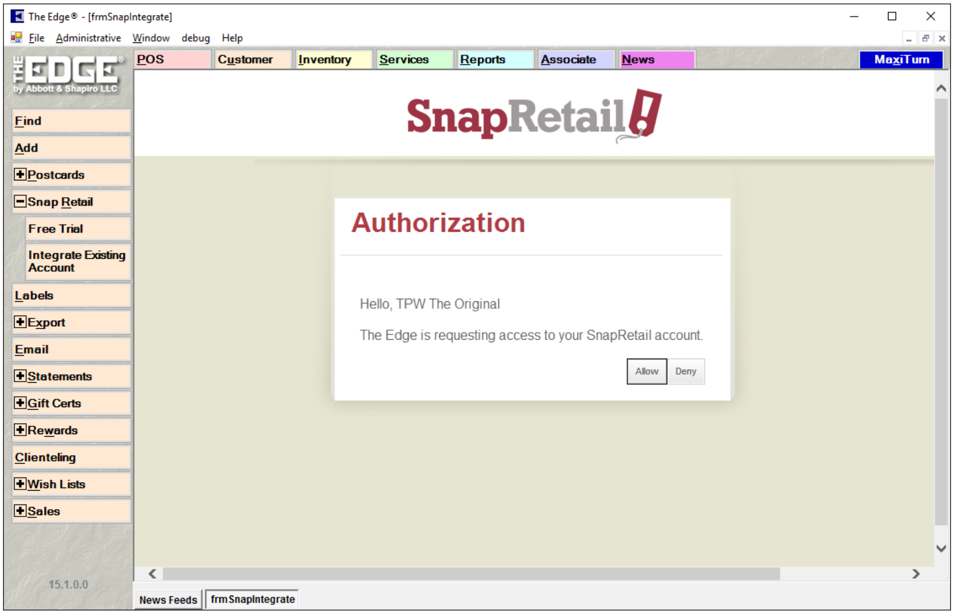
Login

Please login — You have attempted to view a page that requires you to be logged in.

Email Address

Password

2. Enter your credentials and select **Login**. You will be prompted to allow The Edge to access your SnapRetail account.

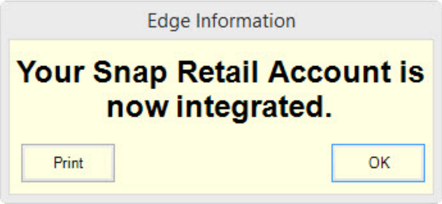


Authorization

Hello, TPW The Original

The Edge is requesting access to your SnapRetail account.

3. Select **Allow**. The connection will be confirmed.


Edge Information

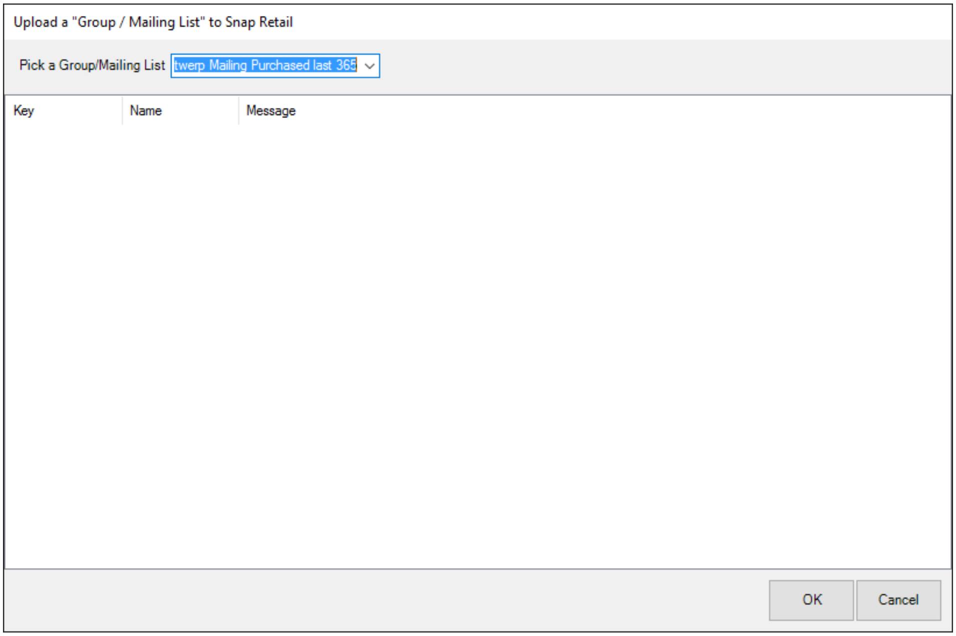
Your Snap Retail Account is now integrated.

4. Select **OK**.

4.6.3 SnapRetail Uploading a Group

After integration is complete, you will be ready to upload an Edge customer list. If you do not have a list created, do so as described in The Edge User Guide in the section entitled Group/Mailing Lists. To upload a group or mailing list:

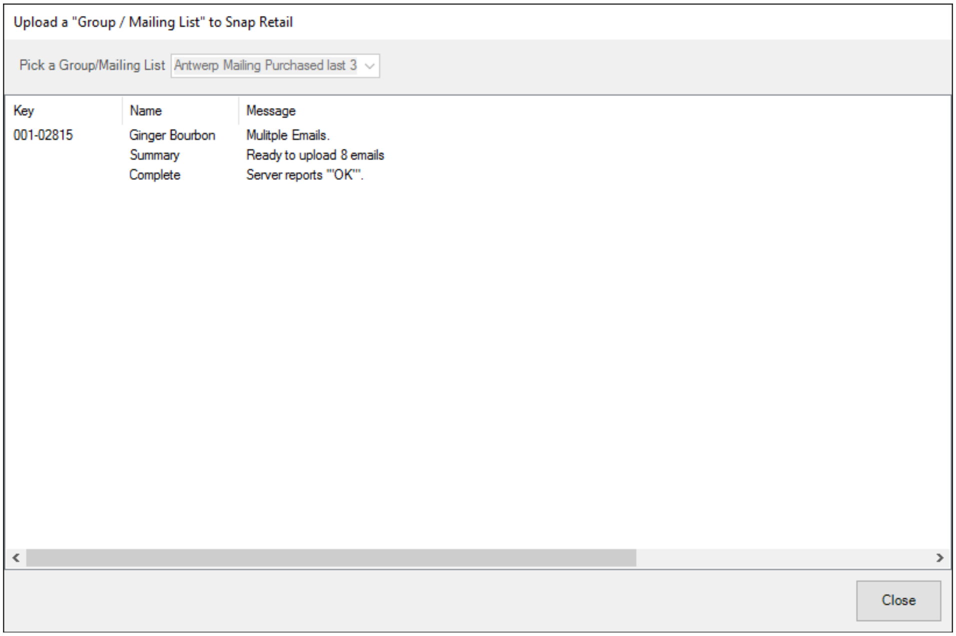
1. Select **Customer ►SnapRetail ► Upload Group**. The **Upload a Group/Mailing List to SnapRetail** window will appear.


Upload a "Group / Mailing List" to Snap Retail

Pick a Group/Mailing List: twerp Mailing Purchased last 365

Key	Name	Message

2. Select a mailing list from the **Pick a Group/Mailing List** drop-down menu.
3. Select **OK**. The list view will report back upload steps and results.



Upload a "Group / Mailing List" to Snap Retail

Pick a Group/Mailing List: Antwerp Mailing Purchased last 3

Key	Name	Message
001-02815	Ginger Bourbon	Mulitple Emails.
	Summary	Ready to upload 8 emails
	Complete	Server reports '"OK"'.

Changes to your customer data happen only in The Edge. To refresh your SnapRetail list, perform an upload. Make sure the list is accurate before a promotion goes out. As a guide, periodically refer to your SnapRetail calendar.

If you make changes to your data at the SnapRetail website, those changes will be overridden if you do an upload from The Edge.

SnapRetail uses the email address as the unique identifier. If multiple customers have same email address, only the first customer in the list will be uploaded. If a customer has more than one email address, it will upload only the first email address listed in the customer record.

4.6.4 SnapRetail Website

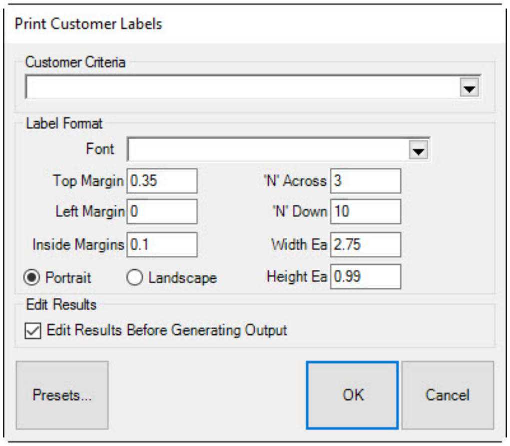
The **Website** option (under **SnapRetail** in the **Customer** menu) takes you directly to the SnapRetail website.

4.7 Generating Customer Mailing Labels

Using The Edge's powerful customer find filter, you can generate mailing labels for all customers in the system or for a specific selection (e.g., those who have purchased diamonds within the last year). For a video tutorial about working with customer filters, go to http://www.screencast.com/t/MkdH1e7iQmqR.

To begin creating mailing labels:

1. Select **Labels** from the **Customer** function menu. The **Print Customer Labels** window will appear.



Print Customer Labels

Customer Criteria

Label Format

Font

Top Margin 0.35 'N' Across 3

Left Margin 0 'N' Down 10

Inside Margins 0.1 Width Ea 2.75

● Portrait ○ Landscape Height Ea 0.99

Edit Results

☑ Edit Results Before Generating Output

2. Select the **Customer Criteria** drop-down menu to access the **Customer Find** feature. Select criteria for the mailing list much as you would in finding a customer record as described in the section entitled Finding a Customer. Narrow your criteria by entering as much information as is desired. Use the **Results** tab to specify what name to use as the addressee for this mailing. This tab is very useful in narrowing down your results and gives you a good degree of control in selecting specific lists of customers. For example, you could use this to target the husbands of all married women who have a birthday next month. Be sure to check the default format options as described below before you select the customer list.

Selecting OK without entering any criteria will prompt The Edge to prepare mailing labels for everyone that has a preferred mailing address. A mailing will not include customers without a preferred mailing address.

3. Use the fields in the **Label Format** area to format the label.

Nacross	The number of labels that run across the printed page.
Width Ea	The width of each label.
Left Margin	The left margin of the page.

Ndown	The number of labels that run down the printed page.
Height Ea	The height of each label.
Top Margin	The top margin of the page.
Inside Margins	The margin on each edge of each label.
Portrait	Indicates that the page containing the labels is in portrait orientation, i.e., taller than it is wide.
Landscape	Indicates that the page containing the labels is in landscape orientation, i.e., wider than it is tall.
Font	Returns a standard font dialog.

The default format for mailing labels conforms to Avery 5160.

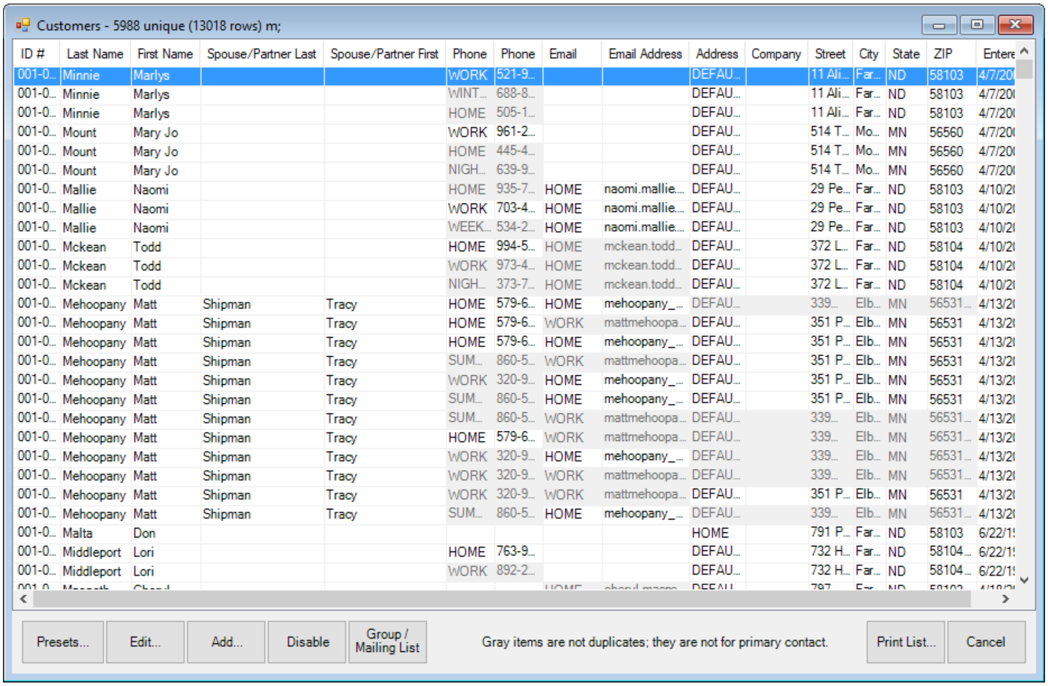
4. Select **OK**. A list of customers to include will appear.
5. Check the ones you wish to print.
6. Select **OK** to preview the labels before they are printed.
7. Select the **Print** from the lower left corner of the preview window to print the labels or select **Close** to go back and edit the list.

4.8 Group/Mailing Lists

The Edge allows you to create and maintain lists of customers for marketing and reporting purposes and those lists can be used throughout the program. There are two ways you can accomplish this in the program. The group/list option is found under **Customer Export**. You can also add customers to lists through the **Customer Filter** under the **Other Keys** tab. List membership also appears as a filter in the **Customer Find** filter. For example, if you want to send an email, from the **Customer Find** area of the **Email** feature, specify the desired list and those members will be added to the email recipient list. For a video tutorial about working with customer filters, go to http://www.screencast.com/t/MkdH1e7iQmqR.

4.8.1 Creating a New Group/Mailing List from Customer Find

1. Select **Customer ► Find**.
2. Enter criteria for customers that should be in the list and select **OK**. This will return a list of matching customers in a customer list window.

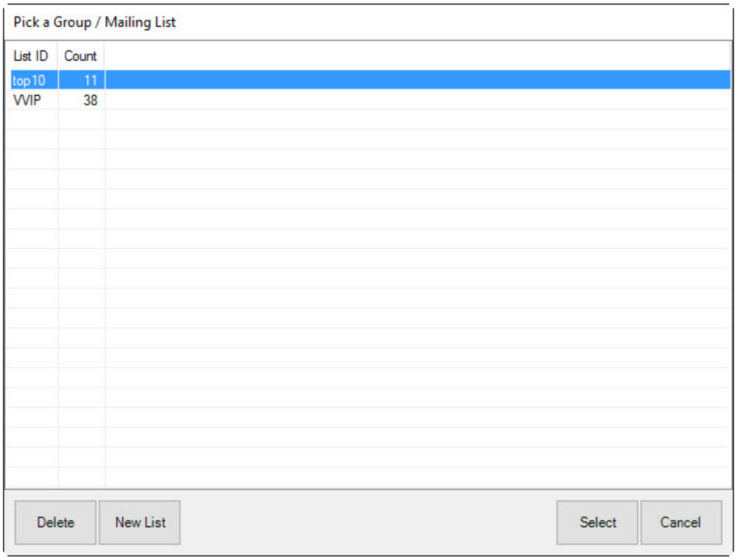


Customers - 5988 unique (13018 rows) m;

ID #	Last Name	First Name	Spouse/Partner Last	Spouse/Partner First	Phone	Phone	Email	Email Address	Address	Company	Street	City	State	ZIP	Entere
001-0…	Minnie	Marlys			WORK	521-9…			DEFAU…		11 Ali…	Far…	ND	58103	4/7/20
001-0…	Minnie	Marlys			WINT…	688-8…			DEFAU…		11 Ali…	Far…	ND	58103	4/7/20
001-0…	Minnie	Marlys			HOME	505-1…			DEFAU…		11 Ali…	Far…	ND	58103	4/7/20
001-0…	Mount	Mary Jo			WORK	961-2…			DEFAU…		514 T…	Mo…	MN	56560	4/7/20
001-0…	Mount	Mary Jo			HOME	445-4…			DEFAU…		514 T…	Mo…	MN	56560	4/7/20
001-0…	Mount	Mary Jo			NIGH…	639-9…			DEFAU…		514 T…	Mo…	MN	56560	4/7/20
001-0…	Mallie	Naomi			HOME	935-7…	HOME	naomi.mallie…	DEFAU…		29 Pe…	Far…	ND	58103	4/10/2
001-0…	Mallie	Naomi			WORK	703-4…	HOME	naomi.mallie…	DEFAU…		29 Pe…	Far…	ND	58103	4/10/2
001-0…	Mallie	Naomi			WEEK…	534-2…	HOME	naomi.mallie…	DEFAU…		29 Pe…	Far…	ND	58103	4/10/2
001-0…	Mckean	Todd			HOME	994-5…	HOME	mckean.todd…	DEFAU…		372 L…	Far…	ND	58104	4/10/2
001-0…	Mckean	Todd			WORK	973-4…	HOME	mckean.todd…	DEFAU…		372 L…	Far…	ND	58104	4/10/2
001-0…	Mckean	Todd			NIGH…	373-7…	HOME	mckean.todd…	DEFAU…		372 L…	Far…	ND	58104	4/10/2
001-0…	Mehoopany	Matt	Shipman	Tracy	HOME	579-6…	HOME	mehoopany_…	DEFAU…		339…	Elb…	MN	56531…	4/13/2
001-0…	Mehoopany	Matt	Shipman	Tracy	HOME	579-6…	WORK	mattmehoopa…	DEFAU…		351 P…	Elb…	MN	56531	4/13/2
001-0…	Mehoopany	Matt	Shipman	Tracy	HOME	579-6…	HOME	mehoopany_…	DEFAU…		351 P…	Elb…	MN	56531	4/13/2
001-0…	Mehoopany	Matt	Shipman	Tracy	SUM…	860-5…	WORK	mattmehoopa…	DEFAU…		351 P…	Elb…	MN	56531	4/13/2
001-0…	Mehoopany	Matt	Shipman	Tracy	WORK	320-9…	HOME	mehoopany_…	DEFAU…		351 P…	Elb…	MN	56531	4/13/2
001-0…	Mehoopany	Matt	Shipman	Tracy	SUM…	860-5…	HOME	mehoopany_…	DEFAU…		351 P…	Elb…	MN	56531	4/13/2
001-0…	Mehoopany	Matt	Shipman	Tracy	SUM…	860-5…	WORK	mattmehoopa…	DEFAU…		339…	Elb…	MN	56531…	4/13/2
001-0…	Mehoopany	Matt	Shipman	Tracy	HOME	579-6…	WORK	mattmehoopa…	DEFAU…		339…	Elb…	MN	56531…	4/13/2
001-0…	Mehoopany	Matt	Shipman	Tracy	WORK	320-9…	HOME	mehoopany_…	DEFAU…		339…	Elb…	MN	56531…	4/13/2
001-0…	Mehoopany	Matt	Shipman	Tracy	WORK	320-9…	WORK	mattmehoopa…	DEFAU…		339…	Elb…	MN	56531…	4/13/2
001-0…	Mehoopany	Matt	Shipman	Tracy	WORK	320-9…	WORK	mattmehoopa…	DEFAU…		351 P…	Elb…	MN	56531	4/13/2
001-0…	Mehoopany	Matt	Shipman	Tracy	SUM…	860-5…	HOME	mehoopany_…	DEFAU…		339…	Elb…	MN	56531…	4/13/2
001-0…	Malta	Don							HOME		791 P…	Far…	ND	58103	6/22/1
001-0…	Middleport	Lori			HOME	763-9…			DEFAU…		732 H…	Far…	ND	58104…	6/22/1
001-0…	Middleport	Lori			WORK	892-2…			DEFAU…		732 H…	Far…	ND	58104…	6/22/1

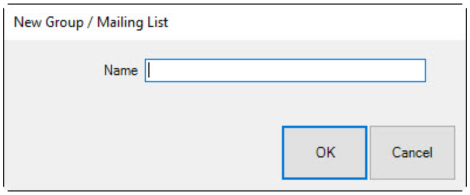
Gray items are not duplicates; they are not for primary contact.

3. Select **Group/Mailing List** from the bottom of the window. The **Pick a Group/Mailing List** window will appear with existing groups.



List ID	Count
top10	11
VVIP	38

4. Select **New List** to create a new group. This will return the **New Group/Mailing List** window where you are asked to provide a name for your new group.



5. Enter a name and click **OK**. You have successfully created and saved a list of customers.

4.8.2 Managing Existing Groups/Lists

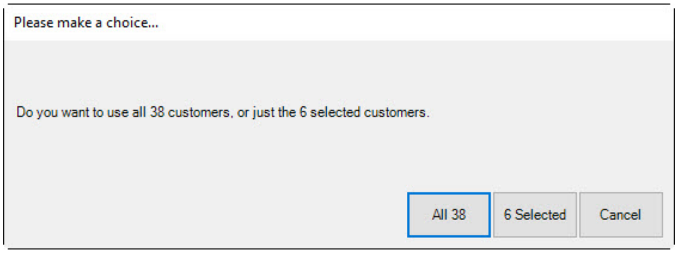
To bring up an existing customer group/list:

1. Select **Customer** ► **Find** and go to the **Other Keys** tab.
2. From **Group/Mailing List** drop-down menu, select your list, and select **OK**.
3. A list of customers in that particular group will be shown.

To remove customers from an existing group/list:

1. Using **Customer** ► **Find**, select the **Other Keys** tab
2. Use the **Group/Mailing List** drop-down menu to find the group you wish to edit.
3. Select **OK** to close the **Group/Mailing List** filter.
4. Select **OK** from the **Customer Find** filter to start the search. A list of customer in the group will appear.

5. Right click anywhere in the list and select **Show Checkboxes** from the context menu.
6. Right click again anywhere in the list and select **Check All**.
7. Go through the list and uncheck those customers you wish to remove.
8. Select **Group/Mailing List** and choose your group/list again.
9. Select the name and select **Select**.
10. You will be prompted to indicate whether you wish to use all customers or just those you selected. Choose just those you selected.

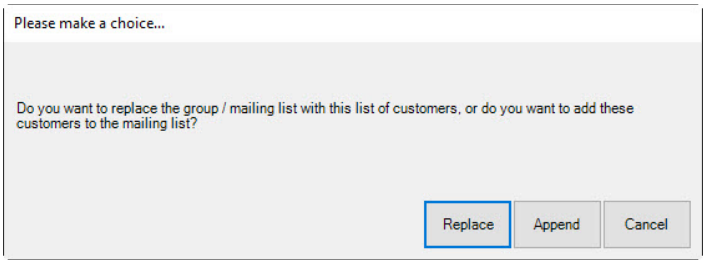

Please make a choice...

Do you want to use all 38 customers, or just the 6 selected customers.

11. You will be prompted to indicate whether you wish to **Replace** or **Append**. Select **Replace**.

To add customers to an existing list:

1. Use **Customer ► Find** to bring up those customers you wish to add.
2. Right click anywhere in the list and select **Show Checkboxes.**
3. Check all customers you wish to add to this list. You can right click again to use the **Check All** option.
4. Select **Group/Mailing List** at the bottom and choose the group/list to which you want to add these customers.
5. You will be prompted to indicate whether you wish to use all customers or just those you selected. Choose just those you selected.
6. You will be prompted to indicate whether you wish to **Replace** or **Append**. Select **Append**.


Please make a choice...

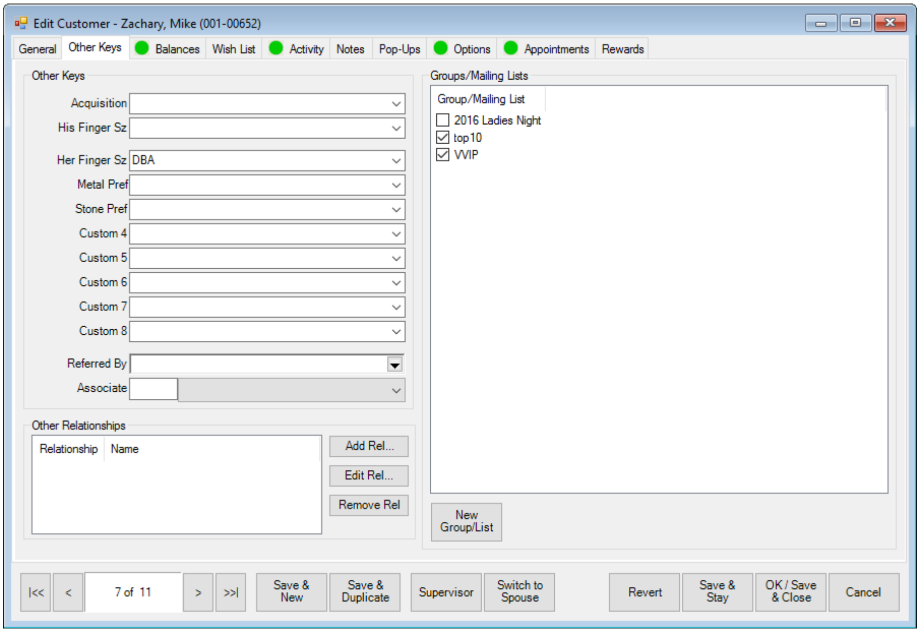
Do you want to replace the group / mailing list with this list of customers, or do you want to add these customers to the mailing list?

4.8.3 Managing Lists from the Customer Record

You can manage what groups/lists a customer belongs to directly from their customer record. This method only allows you to add/edit/delete one customer at a time from a group/list. To do so:

1. Select **Customer ► Find**, look up a specific customer, and double click to open his or her record.

2. Select the **Other Keys** tab.



Edit Customer - Zachary, Mike (001-00652)

Her Finger Sz: DBA

Group/Mailing List

☐ 2016 Ladies Night
☑ top10
☑ VVIP

7 of 11

3. The pane on the right side contains all currently active groups/lists. You can assign this specific customer to a group by checking it, or uncheck it to remove them. Also, you can create new groups/lists here with the **New Group/List** button at the bottom.

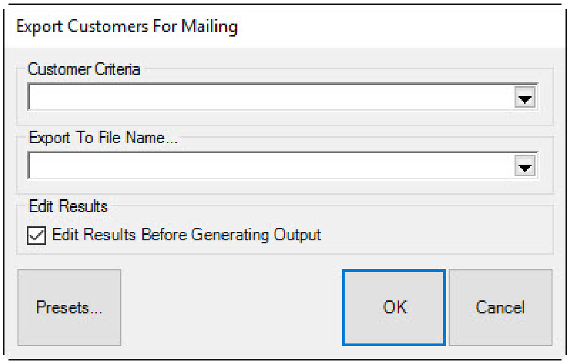
4.9 Exporting Customer Data

The Edge can export customer records into a separate data file. To export records from The Edge:

1. Select **Export** from the **Customer** function menu. This will offer the option to export **For Mailing** or **For Other**.

    - **For Mailing** will include only those customers who have a check in the box labeled **Mailing Address** in the customer record and meet the selected criteria. Also, **For Mailing** will only return the name and address marked preferred. Email addresses as well as mailing addresses will be included in the export.
    - **For Other** will include any customer record that meets the selected criteria and return all columns available regardless of their mailing address preference.

    The **Customer Export** window will appear.



☑ Edit Results Before Generating Output

2. Select the **Customer Criteria** drop-down menu to access the **Customer Find** feature and narrow your list as needed.

Note!

Selecting OK without entering any criteria will prompt The Edge to export all customer records with preferred contact information. The results will include addresses marked as the mailing address.

Tip!

Select the Results tab while specifying customer criteria to specify the export output. Be sure to select Addressee.

3. From the **Export Customers For Mailing** window, select the **Export To File Name** drop-down menu. A standard Windows file saving window will appear.
4. Navigate to the folder where you want the file saved and enter a name for the file. The file should have a `.csv` extension.
5. Select **Save**.

6. Select **OK**. The export will take place. This may take a few minutes. If you see a message that The Edge is not responding, do not close the window. Wait for the process to finish.
7. Results will appear in a list view. Check the records to include.
8. Select **OK**. The file will be available where you saved it.

The default file type when doing an export is comma separated values (.csv). This is a standard format that can be imported into most applications, including spreadsheet applications (MS Excel), word processors (MS Word), and email clients (MS Outlook).

4.10 Sending Out Customer Emails

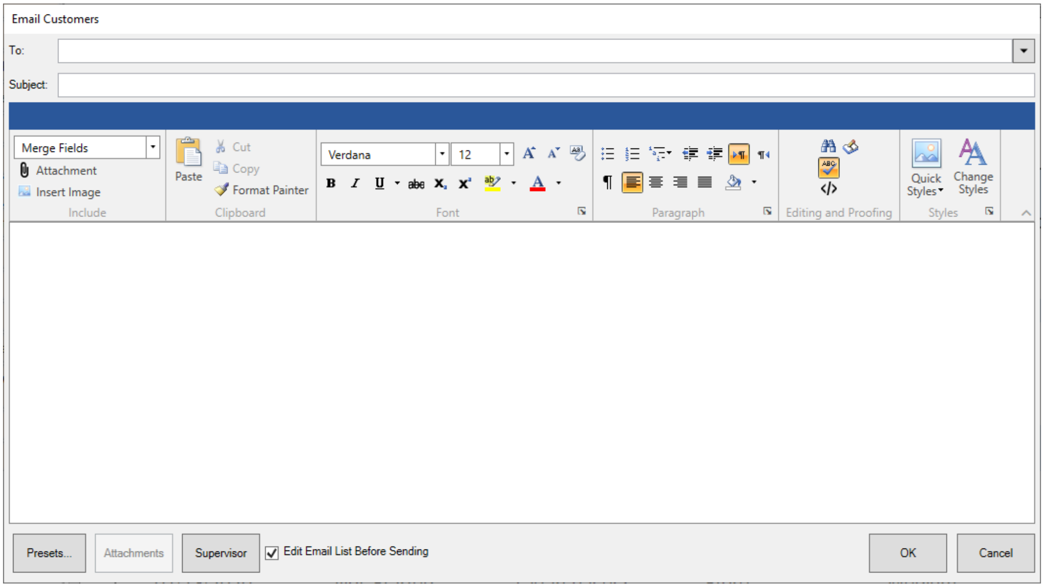
The Edge sends out emails to all of your customers at once. This mass email function uses your own email address and server to send these emails, so you must have a valid email account to use this feature. Check with The Edge Support Team for email account compatibility with this feature. For a video tutorial about working with customer filters, go to http://www.screencast.com/t/MkdH1e7iQmqR.

To setup mass email functionality:

1. Select **Email** from the **Customer** function menu.
2. Select **Supervisor** ► **Outbound Mail Settings**.
3. Specify your email account settings. You may need to contact your Internet Service Provider (ISP) or email service provider to obtain this information.
4. Select **OK** to save your settings.

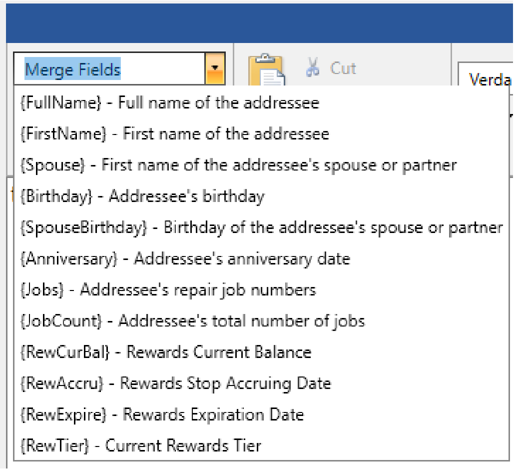
To send out mass emails:

1. Select **Email** from the **Customer** function menu. The **Email Customers** window will appear.



☑ Edit Email List Before Sending

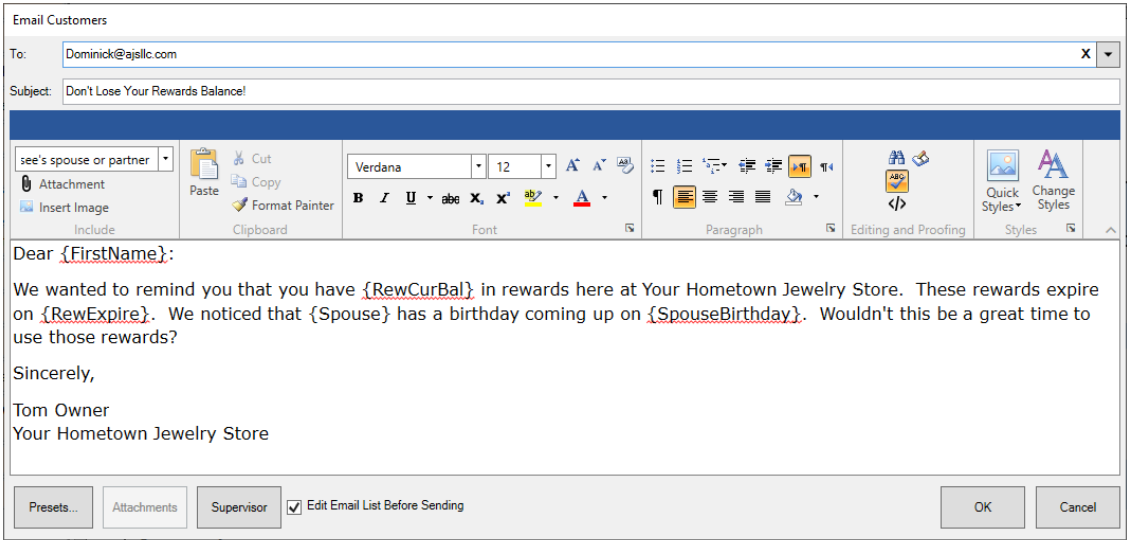
2. Use the **To** field to specify a recipient's email address or click the **To** drop-down to enter criteria to search your customer database.
3. Specify the subject of your email.
4. Write the body.
5. Use the **Merge Fields** drop-down at the top to insert variables that will behave like a mail merge when you send the email. The Edge will pull this data from the customer record and populate the email body.



Available merge fields include:

FullName	Full name of the customer.
FirstName	First name of the customer.
Spouse	The customer's spouse's name.
Birthday	The customer's birthday.
SpouseBirthday	The customer's spouse's birthday.
Anniversary	The customer's wedding anniversary.
Jobs	The envelope numbers belonging to the customer.
JobCount	The number of service jobs associated with the customer.
RewCurBal	The customer's current rewards card balance.
RewAccru	The date to which rewards will accrue.
RewExpire	The date the rewards balance expires.
RewTier	The rewards tier to which this customer is assigned.

6. Write the contents of the email, inserting merge fields where needed. An example might appear as follows.



To: Dominick@ajsllc.com

Subject: Don't Lose Your Rewards Balance!

Dear {FirstName}:

We wanted to remind you that you have {RewCurBal} in rewards here at Your Hometown Jewelry Store. These rewards expire on {RewExpire}. We noticed that {Spouse} has a birthday coming up on {SpouseBirthday}. Wouldn't this be a great time to use those rewards?

Sincerely,

Tom Owner
Your Hometown Jewelry Store

☑ Edit Email List Before Sending

- **You can directly edit the HTML code of a customer email by right clicking in the body and selecting View Source.**
- **To insert an image, right click in the body and select Insert Image.**

7. Select any attachments. This can include images, local files, or something with a URL.
8. Select **OK** to generate a list of matching customers. Select those you wish to email and select **OK** to send out the email.

4.11 Working with Statements

The Edge can automatically calculate and assess finance charges and minimum payments and include them on the printed statement. In addition, with each closed period, the statement balances are aged to provide collection reporting for 30, 60, 90 days, and beyond. Only **Store Charge**, aka **House Account**, balances are processed for interest and aging. The Edge allows you to generate statements that include interest. First you should close the billing period, then generate the statements to be mailed. These processes are described below. For a video tutorial about Statements and Aging, go to http://www.screencast.com/t/EgGYdCTuIyE7.

Statements and aging must be managed from the headquarters store (usually store #1 or 0).

Values for interest rates, minimum payments, and due dates must be set in System Options. If the Statements System Options are not set up, statements will not generate as expected. Customer records may override these settings.

Consumer credit is governed by federal regulation "Title 12: Banks and Banking, PART 1026—TRUTH IN LENDING (REGULATION Z)" which applies to retailers who meet both of these criteria:

- **The offering or extension of credit is done regularly; and**
- **The credit is subject to a finance charge or is payable by a written agreement in more than four installments.**

If you meet *both* of these criteria, then you must comply with several specific requirements that *The Edge does not yet satisfy*. We are working on those additional requirements; for now, we cannot support this for retailers who meet both of these criteria.

4.11.1 Using Statements the First Time Using Versions 6.1 and Higher

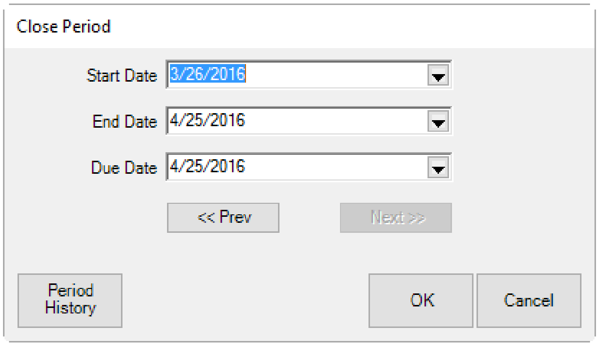
The first time you use the Aging feature, which would be the first time you close a period or run statements after upgrading to any version of The Edge starting with v. 6.1, The Edge will accurately pull the amount due and will make the best attempt to determine whether the amounts are aged (e.g., 30, 60, 90 days past due.) You must verify or adjust this aging one time per customer. You may wish to go to run the Customer Balances report before performing this task to prepare you for this reconciliation.

The Aging feature will show what a customer owes and make an attempt to determine whether it is late based on the current statement settings for statements in **System Options** and historical records in the database. **System Options** may have changed over time, and because of this, the most recent record for a customer might be marked as an estimate and require adjustment so the correct current and past due amounts are accurate. This would also apply to a new user who adjusts statement balances as part of new user setup.

Check your **System Options** before you being this process. The Edge will back up your database before the process begins. In addition, you may wish to check the records of customers for whom **System Options** do not apply. This is managed in the **Options** tab of the customer record.

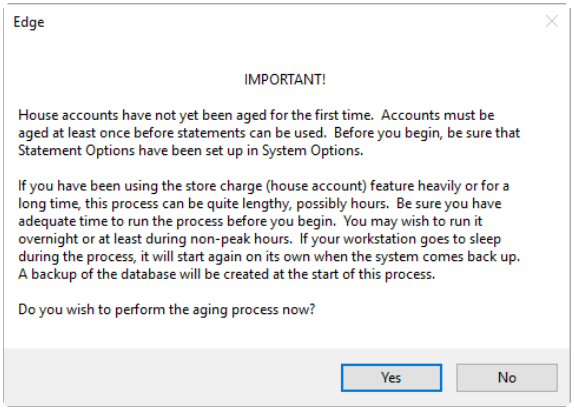
This initial statement process should only happen one time. However, if you have been using the store charge (house account) feature heavily or for a long time, be aware that it can be quite lengthy, possibly hours. Be sure you have adequate time to run the process before you begin. You may wish to run it over night or at least during non-peak hours. If your workstation goes to sleep during the process, it will start again on its own when the system comes back up.

1. From the **Customer** menu, select **Statements** ► **Print** or **Statements** ► **Close**. The **Close Period** window will appear.



Start Date 3/26/2016
End Date 4/25/2016
Due Date 4/25/2016

2. Change the dates as needed and select **OK**. You'll be prompted to confirm that you want to proceed with aging activities.



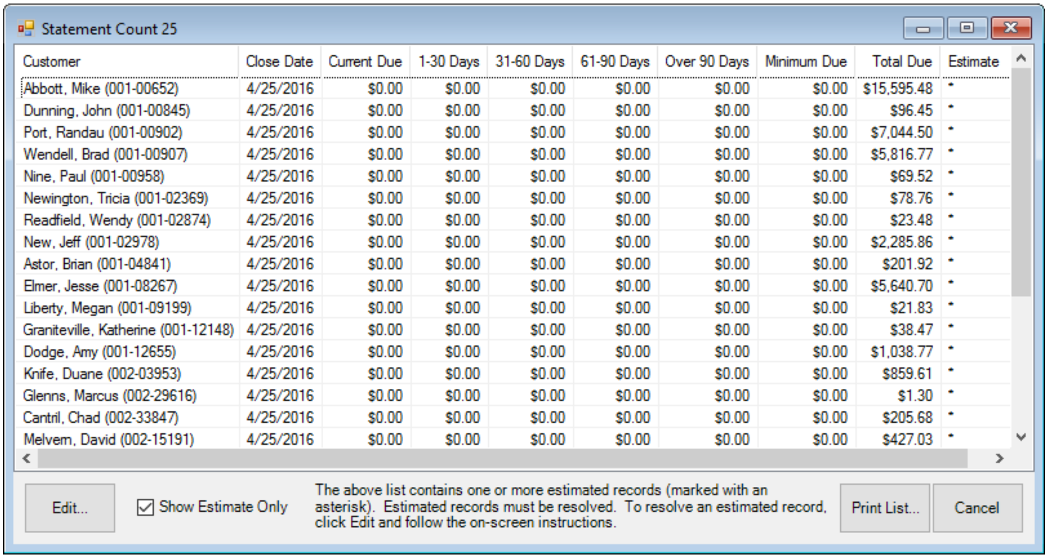
IMPORTANT!

House accounts have not yet been aged for the first time. Accounts must be aged at least once before statements can be used. Before you begin, be sure that Statement Options have been set up in System Options.

If you have been using the store charge (house account) feature heavily or for a long time, this process can be quite lengthy, possibly hours. Be sure you have adequate time to run the process before you begin. You may wish to run it overnight or at least during non-peak hours. If your workstation goes to sleep during the process, it will start again on its own when the system comes back up. A backup of the database will be created at the start of this process.

Do you wish to perform the aging process now?

3. If you select **No**, you will be exited from the function. If you select **Yes**, The Edge will close the current and all previous periods, begin processing statement data, and generate a **Statement List**. As mentioned above, this process may take considerable time, so be prepared.



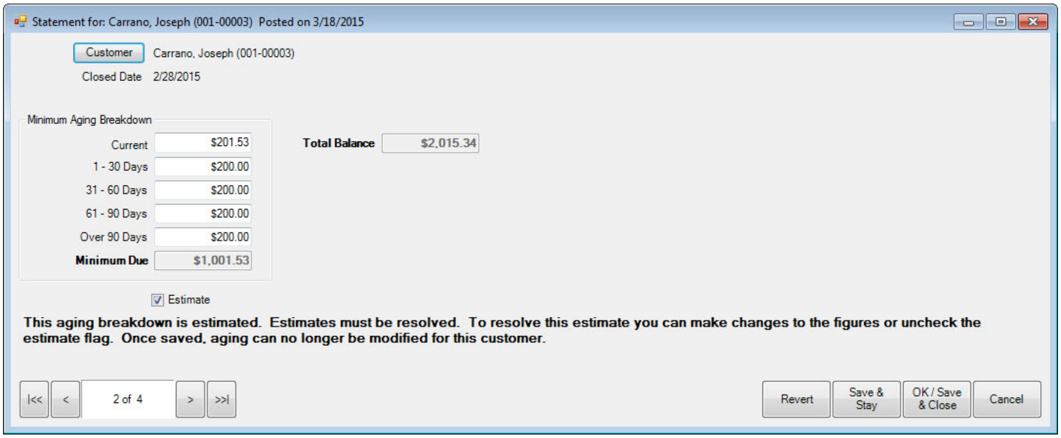
Customer	Close Date	Current Due	1-30 Days	31-60 Days	61-90 Days	Over 90 Days	Minimum Due	Total Due	Estimate
Abbott, Mike (001-00652)	4/25/2016	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$15,595.48	*
Dunning, John (001-00845)	4/25/2016	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$96.45	*
Port, Randau (001-00902)	4/25/2016	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$7,044.50	*
Wendell, Brad (001-00907)	4/25/2016	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$5,816.77	*
Nine, Paul (001-00958)	4/25/2016	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$69.52	*
Newington, Tricia (001-02369)	4/25/2016	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$78.76	*
Readfield, Wendy (001-02874)	4/25/2016	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$23.48	*
New, Jeff (001-02978)	4/25/2016	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$2,285.86	*
Astor, Brian (001-04841)	4/25/2016	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$201.92	*
Elmer, Jesse (001-08267)	4/25/2016	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$5,640.70	*
Liberty, Megan (001-09199)	4/25/2016	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$21.83	*
Graniteville, Katherine (001-12148)	4/25/2016	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$38.47	*
Dodge, Amy (001-12655)	4/25/2016	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,038.77	*
Knife, Duane (002-03953)	4/25/2016	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$859.61	*
Glenns, Marcus (002-29616)	4/25/2016	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1.30	*
Cantril, Chad (002-33847)	4/25/2016	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$205.68	*
Melvem, David (002-15191)	4/25/2016	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$427.03	*

☑ Show Estimate Only

The above list contains one or more estimated records (marked with an asterisk). Estimated records must be resolved. To resolve an estimated record, click Edit and follow the on-screen instructions.

Shown is a list of customers who have a balance and for whom The Edge has estimated the aging for each balance. In this case, The Edge runs the **Statement Find** with filters set for first-time aging. In the future, when you use the **Statement Find** feature, you will be offered filtering options. For more information, see the section entitled Finding and Editing Estimates.

4. Locate the record you wish to edit and open it. Note that for any customer, only the most recent statement will be editable.



Customer: Carrano, Joseph (001-00003)
Closed Date: 2/28/2015

Minimum Aging Breakdown

Current	$201.53
1 - 30 Days	$200.00
31 - 60 Days	$200.00
61 - 90 Days	$200.00
Over 90 Days	$200.00
Minimum Due	$1,001.53

Total Balance $2,015.34

☑ Estimate

This aging breakdown is estimated. Estimates must be resolved. To resolve this estimate you can make changes to the figures or uncheck the estimate flag. Once saved, aging can no longer be modified for this customer.

Fields and options to be edited in the **Statement** window include:

Customer	The name of the customer whose record is being adjusted. Notice that if you select **Customer**, you will be taken to the customer record where you can work with the customer's settings or review activities.
Closed Date	The closing period end date of the record being adjusted.
Minimum Aging Breakdown	
Current	The amount due on the account for current period.
1-30 Days	The amount up to 30 days past due.
31-60 Days	The amount 31 to 60 days past due.
61-90 Days	The amount 61 to 90 days past due.
Over 90 Days	The amount over 90 days past due.
Minimum Due	Based on **System Options**, the amount due, usually including all overdue balances plus the **Current Due**.
Total Balance	The total balance on the account.
Estimate	Whether the amounts shown are estimated by The Edge based on previous statements. If you alter the amounts above, this field will be cleared on the assumption that you have made all the desired adjustments.

5. Make changes to the statement record and save. Amounts shown under **Aging Breakdown** should add up to equal the **Minimum Due**. If you agree with the aging shown, uncheck the **Estimate** option.

Important!

Once adjustments are made or the Estimate option is unchecked and you select Save, you cannot undo this action.

6. Repeat for as many records as necessary.
7. Note that if the account balance on the most recent statement is $0.00 or a negative value (in which a credit is owed the customer), no action is required at this time.
8. After all adjustments are made, you can proceed with printing statements by selecting **Statements ► Print** from the Customer menu.

If you do not adjust/verify aging for all customers, any statements for them will have a disclaimer as described in **System Options**. In addition, you will be prompted to verify aging next time you work with statements.

4.11.1.1 Undoing the First Aging

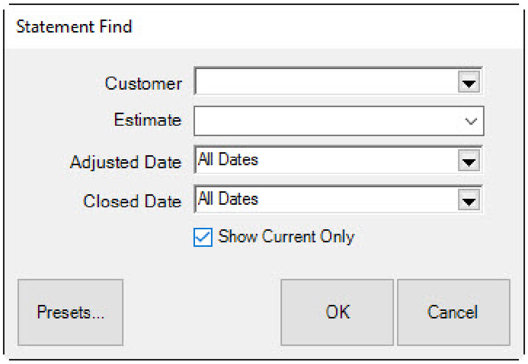
In the unlikely event that you wish to undo the initial statement aging, it must be done within 15 days. We recommend you contact The Edge Support Team before proceeding. To undo the process above:

1. Select **Statements ▶ Close Period**. The **Close Period** window will appear.
2. Select **Period History**.
3. From the **Supervisor** menu, select **Undo All Periods**.

4.11.1.2 Finding and Editing Estimates

If you have chosen not to adjust or verify accounts as described above, and wish to do so without running **Statements ▶ Close**, do the following:

1. From the **Customer** menu, select **Statements ▶ Aging ▶ Find**. The **Statement Find** filter will appear.



Customer:
Estimate:
Adjusted Date: All Dates
Closed Date: All Dates
☑ Show Current Only

Fields and options in the **Statement Find** filter include:

Customer	Allows you use the **Customer Find** feature and returns matching records.
Estimate	Allows you to filter results based on whether the statement reflects an estimated balance.
Adjusted Date	Allows you to filter by a specific adjusted date. This is the date that the account has been determined to be adjusted from initial estimation by The Edge. For more information about adjustments, see the section entitled Using Statements the First Time Using Versions 6.1 and Higher.
Closed Date	Allows you to filter by a specific closed date.
Show Current Only	Only the most recent period is editable; this indicates whether to return only current closing periods.

2. Locate the records using the **Statement Find** filter. Depending on the number of records you have, this could take some time. As always, the **Presets** feature allows you to save search parameters for future use. See the section entitled Presets for more information. The **Statement** list will appear.
3. Locate the record you wish to edit and open it. Note that for any customer, only the most recent statement will be editable.
4. Make changes to the statement record and save. Amounts shown under **Aging Breakdown** should add up to equal the **Minimum Due**. If you agree with the aging shown, uncheck the **Estimate** option.

Once adjustments are made or the Estimate option is unchecked and you select Save, you cannot undo this action.

5. Repeat for as many records as necessary.

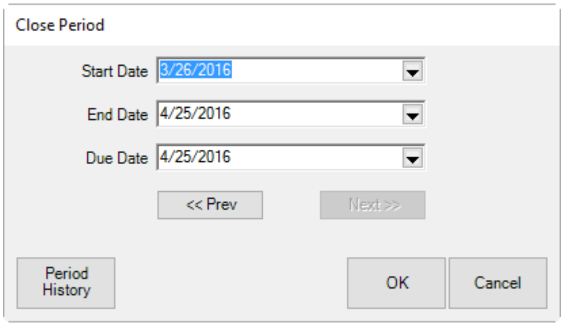
You can only adjust an estimate and confirm the aging once for each record.

4.11.2 Close Period

You will want to maintain aging, statements, and finance charges on house accounts based on **System Options**. Closing the period tracks aging and financial information based on the period end date. The Edge then makes that available for printed statements and related customer reports. When you close the period, The Edge will post finance charges and applies aging to accounts.

To close the period:

1. From the **Customer** menu, select **Statements ► Close Period**. The **Close Period** window will appear.



Close Period

Start Date 3/26/2016

End Date 4/25/2016

Due Date 4/25/2016

2. The **Start Date** and **End Date** will be populated based on your **System Options** and the billing cycle that has yet to be closed. You can use the **Prev** and **Next** buttons to scroll through the billing cycles.
3. Check the dates and select **OK**. An end date earlier than the current date must be specified.

4.11.2.1 Undoing Close

In the event you close a period and later find adjustments are necessary to customer balances, fees, or other options, you may undo the period close. This can be done up to 15 days after the closing of the current period. To undo a close or statement printing:

1. Select **Statements** ► **Close Period**. The **Close Period** window will appear.
2. Select **Period History**.
3. From the **Supervisor** menu, select **Undo Current Period**. You cannot undo any but the most recently closed period.

- **You cannot undo a close for a period that is more than 15 days closed.**
- **Stores who manage house accounts and do not post finance charges should still use Close Period function when they print monthly statements because it is the only means to track aging.**
- **If you attempt to adjust accounts that are from a previously closed period, you will be prompted use Undo Close Period to undo the close and close again after making adjustments.**

4.11.3 Voiding Statement Finance Charges

You can void finance charges for a whole batch of statements. This can only happen within 15 days of the closing. For changes to individual finance charges and account balances, do so through the **Customer Balances** tab of the customer record. To void finance charges for a particular customer:

1. Locate the transaction using any of the following methods:
   - **Customer** ► **Sales** ► **Find** as described in the section entitled Find Sales.
   - **Point of Sale** ► **Review Receipts** as described in the section entitled Review Receipts.
2. Void that transaction, which may be labeled a sale, even though it is an interest charge (under **Supervisor** functions).

- **When working with statement finance charges, be sure to select the transaction that represents the finance charge, not the purchase.**
- **To void a whole batch of statement finance charges, use the Undo Close Period process described in the section entitled Undoing Close.**

Finance charge transactions are easily identifiable in receipt lists as they will always show up at 11:59 p.m. of the day you applied them.

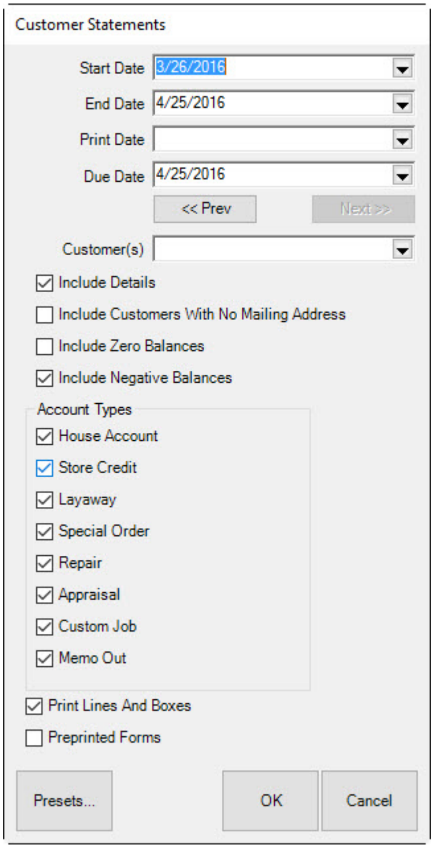
4.11.4 Generating Billing Statements

The Edge makes it easy to generate billing statements for charge accounts.

Statements are generated and sent to the primary customer.

To review and print customer statements:

1. Select **Statements** ► **Print** from the **Customer** menu. The **Customer Statements** window will appear.



Customer Statements

Start Date 3/26/2016

End Date 4/25/2016

Print Date

Due Date 4/25/2016

Customer(s)

☑ Include Details
☐ Include Customers With No Mailing Address
☐ Include Zero Balances
☑ Include Negative Balances

Account Types
☑ House Account
☑ Store Credit
☑ Layaway
☑ Special Order
☑ Repair
☑ Appraisal
☑ Custom Job
☑ Memo Out

☑ Print Lines And Boxes
☐ Preprinted Forms

Fields and options in the **Customer Statements** window include:

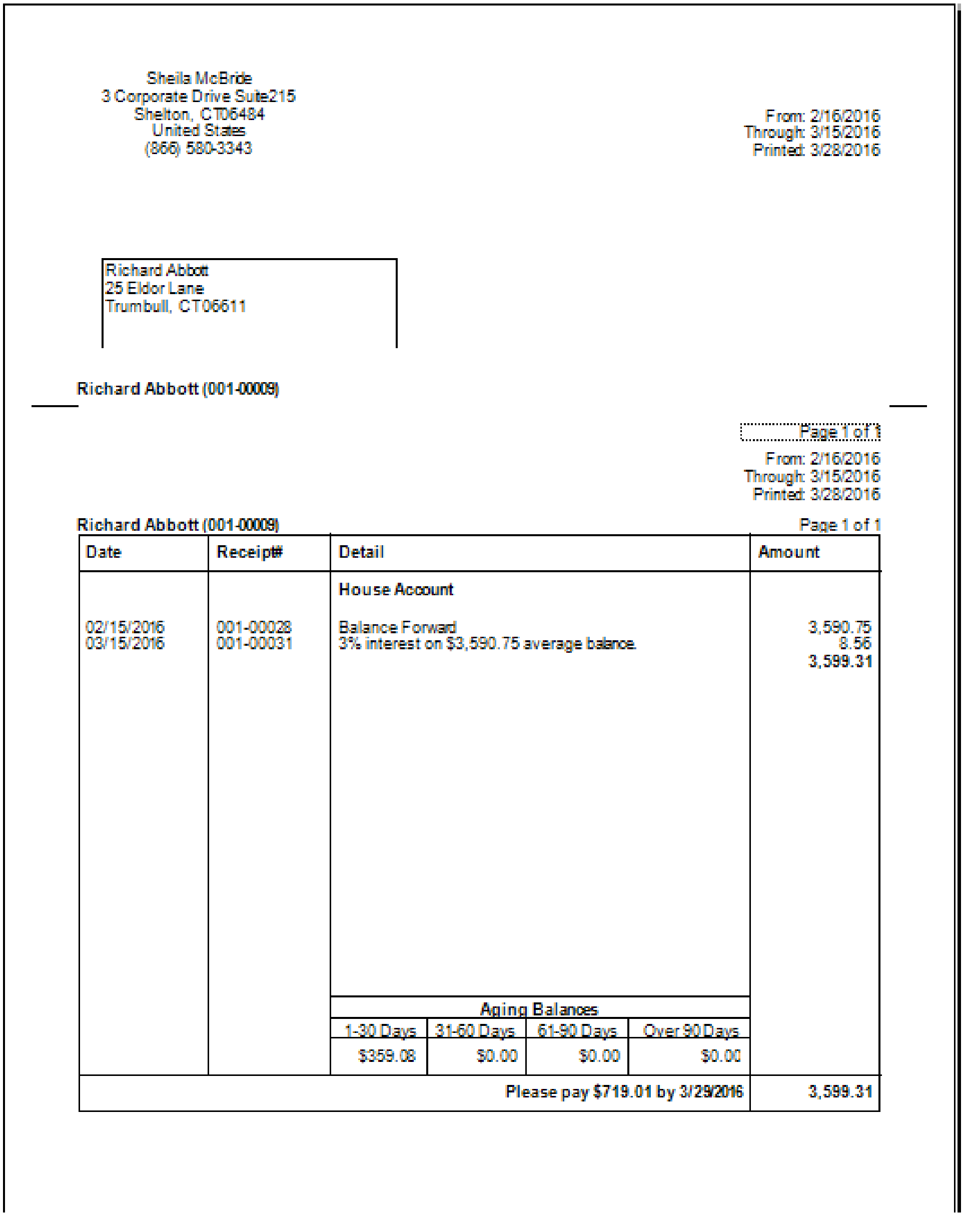
Start Date	Allows you to select the date after which activity will be detailed.

End Date	Allows you to select the date after which activity will not be included.
Print Date	Allows you to specify a different print date from today.
Due Date	Allows you to narrow results by due date.
Prev	Automatically bumps dates back by one period.
Next	Automatically bumps dates forward by one period.
Customer(s)	Allows you to select the customer or customers for whom statements should be generated.
Include Details	Indicates that the statement should include item details. Note that there are no item details for a store charge or store credit.
Include Customers with no Mailing Address	Indicates that statements should be generated even for customers who have no mailing address, such as those to whom statements can be given in person.
Include Zero Balances	Allows you to select records with zero balances.
Include Negative Balances	Allows you to select records with negative balances.
Account Types	Allows you to select from a number of different account types: • **House Account** • **Store Credit** • **Layaway** • **Special Order** • **Repair** • **Appraisal** • **Custom Job** • **Memo Out.**
Print Lines and Boxes	Indicates whether the lines and boxes between fields should show.
Preprinted Forms	Indicates whether your statements print on preprinted paper forms.

2. Select the desired criteria for the statements you want to generate.
3. Select **OK**. If you have not closed the period, you will be prompted to do so.
4. The first statement will appear on window. Please note that the total number of pages will appear in the **Total Page No.** field.
5. Print the statements. We recommend printing to the report printer.

House account statements should contain only amounts charged to the house account, but customers may want an accounting of other outstanding balances such as layaway, repair, custom jobs, etc. If such balances exist, The Edge will run statements with sections for both: a section containing house account activity and a section containing other types of account activity. Further, you can control what appears on the latter using the Account Types option described above.

House Account Page



Sheila McBride
3 Corporate Drive Suite215
Shelton, CT06484
United States
(866) 580-3343

From: 2/16/2016
Through: 3/15/2016
Printed: 3/28/2016

Richard Abbott
25 Eldor Lane
Trumbull, CT06611

Richard Abbott (001-00009)

Page 1 of 1

From: 2/16/2016
Through: 3/15/2016
Printed: 3/28/2016

Richard Abbott (001-00009)

Page 1 of 1

Date	Receipt#	Detail	Amount
		House Account	
02/15/2016	001-00028	Balance Forward	3,590.75
03/15/2016	001-00031	3% interest on $3,590.75 average balance.	8.56
			3,599.31

Aging Balances

1-30 Days	31-60 Days	61-90 Days	Over 90 Days
$359.08	$0.00	$0.00	$0.00

Please pay $719.01 by 3/29/2016 **3,599.31**

In the event of aged balances, there is a line that reads "x% interest on $x average balance." This is the calculated finance charge based on the parameters that you set up in **System Options**. Note that the "average balance" is calculated as the balance per day added together then divided by the number of days in the billing cycle.

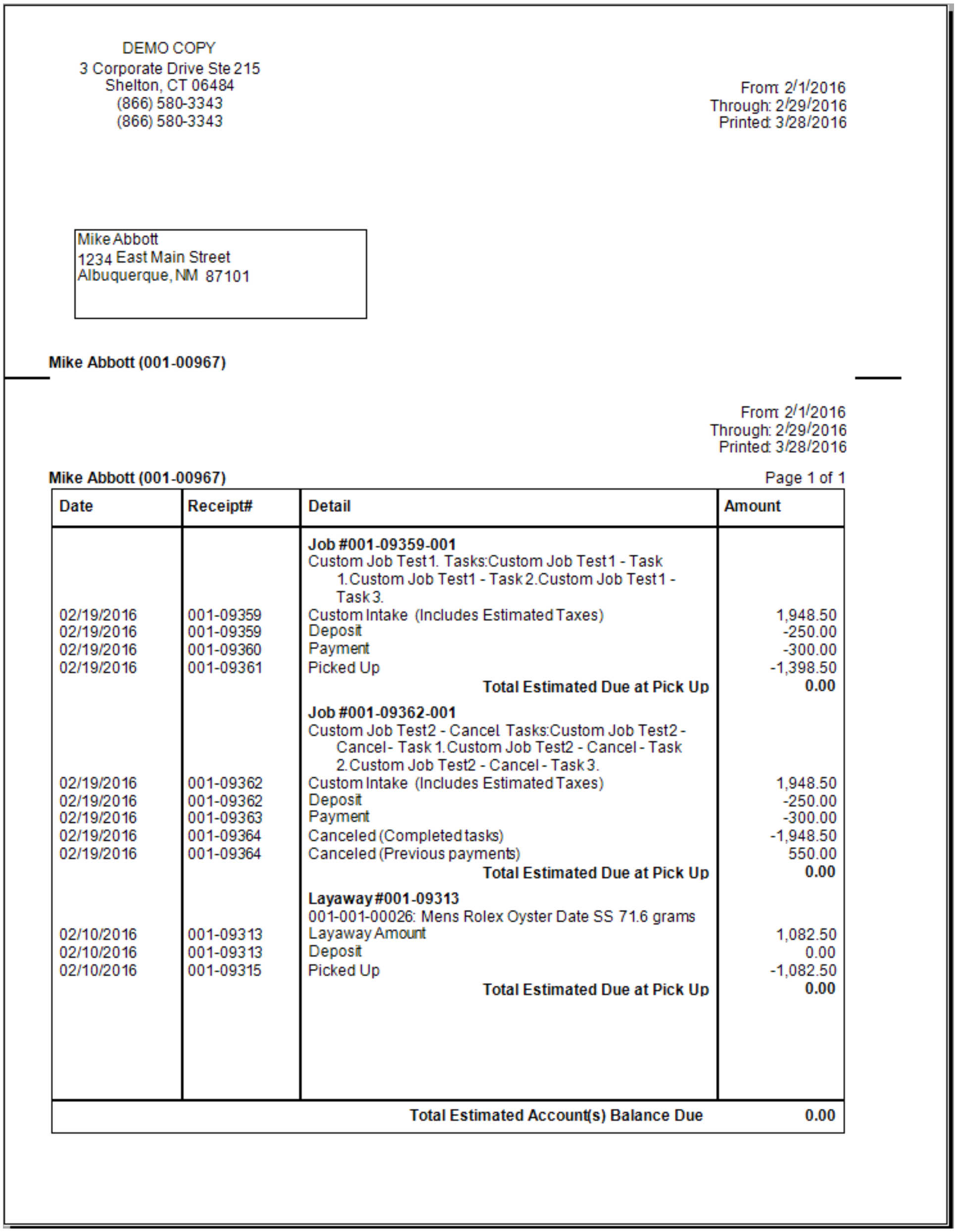
You will also notice the legend “Please pay $x by xx/xx/xx” at the bottom of the receipt. This is the minimum payment calculated according to the parameters that you specified in **System Options**. The date is the payment due date and can be different from the close date.

Descriptions will be truncated at 255 words.

Important!

As The Edge becomes more compliant with the Fair Credit Reporting Act, payments and tracking of items such as layaways and repairs may not be included in the total due shown on statements. It will be necessary to exclude these items from the total amount due to ensure compliance.

Services Page



DEMO COPY
3 Corporate Drive Ste 215
Shelton, CT 06484
(866) 580-3343
(866) 580-3343

From: 2/1/2016
Through: 2/29/2016
Printed: 3/28/2016

Mike Abbott
1234 East Main Street
Albuquerque, NM 87101

Mike Abbott (001-00967)

From: 2/1/2016
Through: 2/29/2016
Printed: 3/28/2016

Mike Abbott (001-00967)

Page 1 of 1

Date	Receipt#	Detail	Amount
		Job #001-09359-001 Custom Job Test1. Tasks:Custom Job Test1 - Task 1.Custom Job Test1 - Task 2.Custom Job Test1 - Task 3.	
02/19/2016	001-09359	Custom Intake (Includes Estimated Taxes)	1,948.50
02/19/2016	001-09359	Deposit	-250.00
02/19/2016	001-09360	Payment	-300.00
02/19/2016	001-09361	Picked Up	-1,398.50
		Total Estimated Due at Pick Up	**0.00**
		Job #001-09362-001 Custom Job Test2 - Cancel. Tasks:Custom Job Test2 - Cancel - Task 1.Custom Job Test2 - Cancel - Task 2.Custom Job Test2 - Cancel - Task 3.	
02/19/2016	001-09362	Custom Intake (Includes Estimated Taxes)	1,948.50
02/19/2016	001-09362	Deposit	-250.00
02/19/2016	001-09363	Payment	-300.00
02/19/2016	001-09364	Canceled (Completed tasks)	-1,948.50
02/19/2016	001-09364	Canceled (Previous payments)	550.00
		Total Estimated Due at Pick Up	**0.00**
		Layaway #001-09313 001-001-00026: Mens Rolex Oyster Date SS 71.6 grams	
02/10/2016	001-09313	Layaway Amount	1,082.50
02/10/2016	001-09313	Deposit	0.00
02/10/2016	001-09315	Picked Up	-1,082.50
		Total Estimated Due at Pick Up	**0.00**
		Total Estimated Account(s) Balance Due	**0.00**

- **Statements will indicate transactions made on a house account, but not detailed information about transactions. Instead, the store charge account will show payments and purchases made and the current total balance due.**
- **Repair, custom, and appraisal jobs that are marked “Estimate Only” and have not been approved will not show on customer statements.**

4.11.4.1 Off-Cycle Statements

You can specify starting and ending dates to print a statement that covers a period of time that does not start or end on a cycle and/or a longer or shorter period than one cycle. This may be useful if you want to give a customer a statement of all charges or just charges within a certain time frame. However, this may cause the amount due and the aging to appear inconsistent.

In the case of off-cycle statements, the statements will be footnoted for full disclosure. The wording for this disclosure can be set in **System Options**.

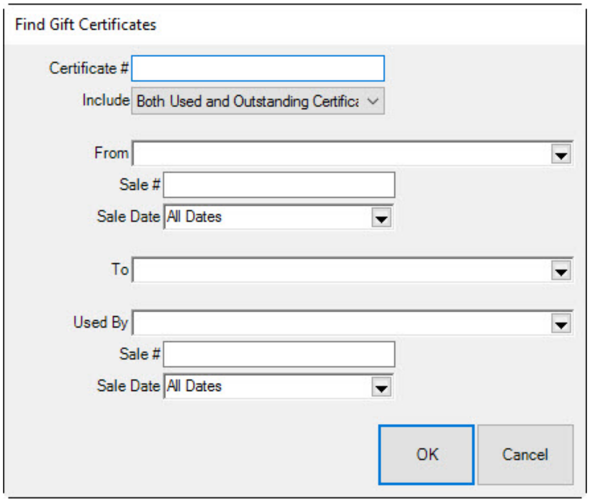
4.12 Working with Gift Certificates

4.12.1 Finding and Editing a Gift Certificate

Gift certificates are usually issued and redeemed at Point of Sale. But to track details about gift certificates purchased at your store, use the **Gift Certs** function in The Edge's **Customer** menu. Gift certificate features can be turned off in **System Options**.

To review details about gift certificate transactions:

1. Select **Gift Certs ▶ Find** from the **Customer** menu. The **Find Gift Certificates** window will appear.



Include Both Used and Outstanding Certific

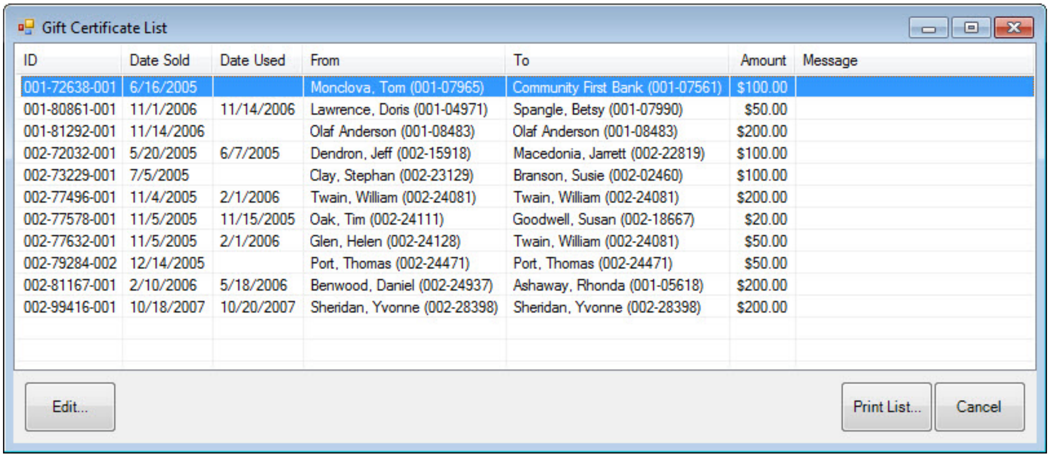
Sale Date All Dates

Sale Date All Dates

Fields and options in the **Find Gift Certificates** window include:

Certificate #	Returns certificates with the specified ID number.
Include	Allows you to select whether used, outstanding, or both types of certificates should appear.
From	Returns certificates purchased by a selected customer set.
Sale #	Returns certificates purchased during a particular transaction.
Sale Date	Returns certificates purchased during a particular date range.
To	Returns certificates intended for a particular person.
Used by	Returns certificates used by a particular customer.
Sale #	Returns certificates used during a particular transaction.
Sale Date	Returns certificates used on a particular day.

2. Complete the fields as needed to retrieve the appropriate data.
3. Select **OK**.
4. The **Gift Certificate List** along with basic information about each will appear on the window.

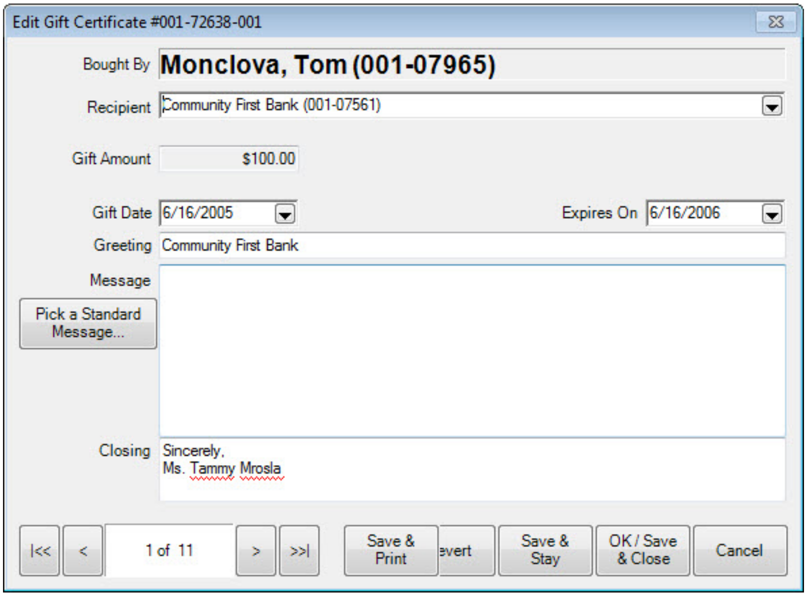


Gift Certificate List

ID	Date Sold	Date Used	From	To	Amount	Message
001-72638-001	6/16/2005		Monclova, Tom (001-07965)	Community First Bank (001-07561)	$100.00	
001-80861-001	11/1/2006	11/14/2006	Lawrence, Doris (001-04971)	Spangle, Betsy (001-07990)	$50.00	
001-81292-001	11/14/2006		Olaf Anderson (001-08483)	Olaf Anderson (001-08483)	$200.00	
002-72032-001	5/20/2005	6/7/2005	Dendron, Jeff (002-15918)	Macedonia, Jarrett (002-22819)	$100.00	
002-73229-001	7/5/2005		Clay, Stephan (002-23129)	Branson, Susie (002-02460)	$100.00	
002-77496-001	11/4/2005	2/1/2006	Twain, William (002-24081)	Twain, William (002-24081)	$200.00	
002-77578-001	11/5/2005	11/15/2005	Oak, Tim (002-24111)	Goodwell, Susan (002-18667)	$20.00	
002-77632-001	11/5/2005	2/1/2006	Glen, Helen (002-24128)	Twain, William (002-24081)	$50.00	
002-79284-002	12/14/2005		Port, Thomas (002-24471)	Port, Thomas (002-24471)	$50.00	
002-81167-001	2/10/2006	5/18/2006	Benwood, Daniel (002-24937)	Ashaway, Rhonda (001-05618)	$200.00	
002-99416-001	10/18/2007	10/20/2007	Sheridan, Yvonne (002-28398)	Sheridan, Yvonne (002-28398)	$200.00	

To edit a gift certificate:

1. Select a gift certificate from the **Gift Certificate List** and select **Edit** or double-click on the record. The **Edit Gift Certificate** window will appear.



Edit Gift Certificate #001-72638-001

Bought By: Monclova, Tom (001-07965)

Recipient: Community First Bank (001-07561)

Gift Amount: $100.00

Gift Date: 6/16/2005

Expires On: 6/16/2006

Greeting: Community First Bank

Message:

Closing: Sincerely,
Ms. Tammy Mrosla

Fields and options in the **Edit Gift Certificate** window include:

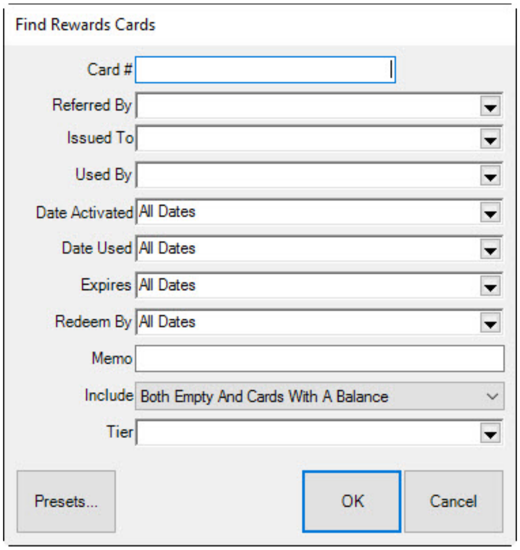
Bought By	Customer who purchased the gift certificate.
Recipient	Person for whom the gift certificate was purchased.
Gift Amount	The value of the gift certificate.
Gift Date	The date the gift certificate was purchased.
Expires On	Date the gift certificate expires.
Greeting	The recipient as you want the name to appear on the gift certificate.
Message	Personalized message to be included on the gift certificate.
Pick a Standard Message	Allows you to create and/or select a predefined message from a list in The Edge.
Closing	Closing of the message.

2. Edit fields as desired.
3. Select a save option.

4.13 Rewards

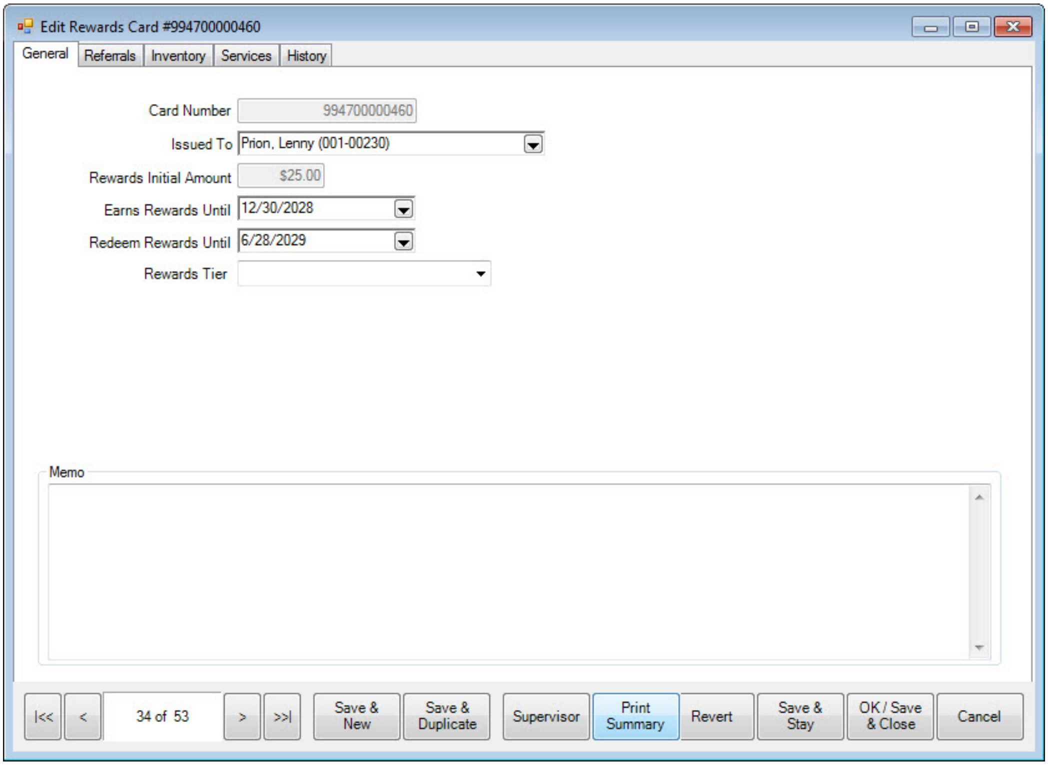
For a video tutorial about using Rewards and Referrals, go to http://www.screencast.com/t/2nzjGmVi. To work with customer rewards:

1. Find the reward by selecting **Customer** ► **Rewards** ► **Find**. The **Find Rewards Cards** filter will appear.



Date Activated: All Dates
Date Used: All Dates
Expires: All Dates
Redeem By: All Dates
Include: Both Empty And Cards With A Balance

2. Narrow the parameters as required and select **OK**. The **Reward Card** list window will appear.
3. Select the record with which you wish to work and select **Edit**. The **Edit Rewards Cards** window will appear with the **General** tab open.



Edit Rewards Card #994700000460

Card Number: 994700000460

Issued To: Prion, Lenny (001-00230)

Rewards Initial Amount: $25.00

Earns Rewards Until: 12/30/2028

Redeem Rewards Until: 6/28/2029

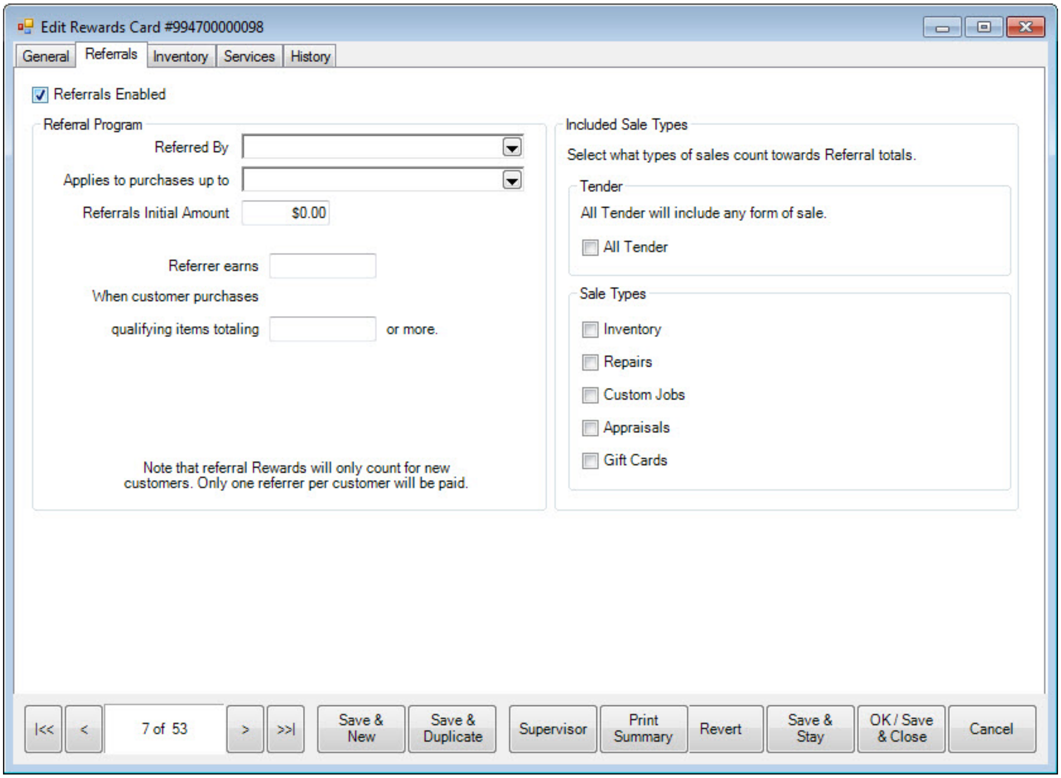
Rewards Tier:

Memo

Fields and options in the **General** tab include:

Card Number	The number of the card to be reviewed/edited.
Issued To	The name of the customer to whom it was issued.
Rewards Initial Amount	The amount originally put on the card.
Earns Rewards Until	The date until which the card can earn rewards.
Redeem Rewards Until	The date until which the customer can use the rewards on the card.
Rewards Tier	The tier of the card. See the section entitled Rewards Program for more information.
Memo	Allows you to make notes about the card.

4. Select the **Referrals** tab to work with referral cards.



☑ Referrals Enabled

Referral Program

Referred By
Applies to purchases up to
Referrals Initial Amount $0.00
Referrer earns
When customer purchases
qualifying items totaling or more.

Note that referral Rewards will only count for new customers. Only one referrer per customer will be paid.

Included Sale Types

Select what types of sales count towards Referral totals.

Tender

All Tender will include any form of sale.

☐ All Tender

Sale Types

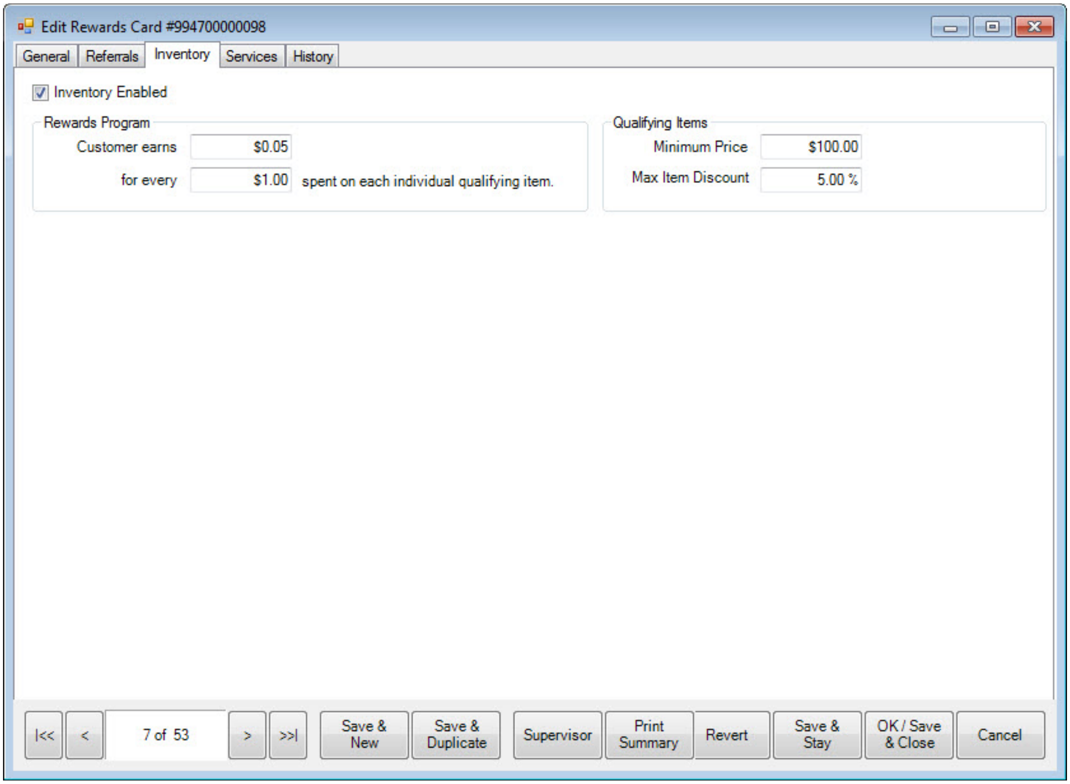
☐ Inventory
☐ Repairs
☐ Custom Jobs
☐ Appraisals
☐ Gift Cards

Fields and options in the **Referrals** tab include:

Referrals Enabled	Indicates that the card can be used for referral bonus money as well as rewards. This can be used to provide a retroactive referral bonus.
Referred By	Allows you to use the **Find Customer** feature to indicate the referring customer.
Applies to purchases up to	For the referrer to get a bonus, the date by which the referee must spend the qualifying amount as entered in the **When customer purchases qualifying items totaling or more** field.
Referrals Initial Amount	The initial amount of the referral card.
Referrer Earns…	The amount the referring customer will get when the referred customer makes a purchase. This takes the form of a credit memo.
…When customer purchases qualifying items totaling or more	The amount which the referred customer must spend for the referring customer to earn the credit indicated in the previous field.

Included Sale Types	Types of sales to include in this referral account: **All Tender** **Inventory** **Repairs** **Custom Jobs** **Appraisals** **Gift Cards**.

5. Make changes in the **Referrals** tab as required and select the **Inventory** tab.



Edit Rewards Card #994700000098

☑ Inventory Enabled

Rewards Program

Customer earns $0.05

for every $1.00 spent on each individual qualifying item.

Qualifying Items

Minimum Price $100.00

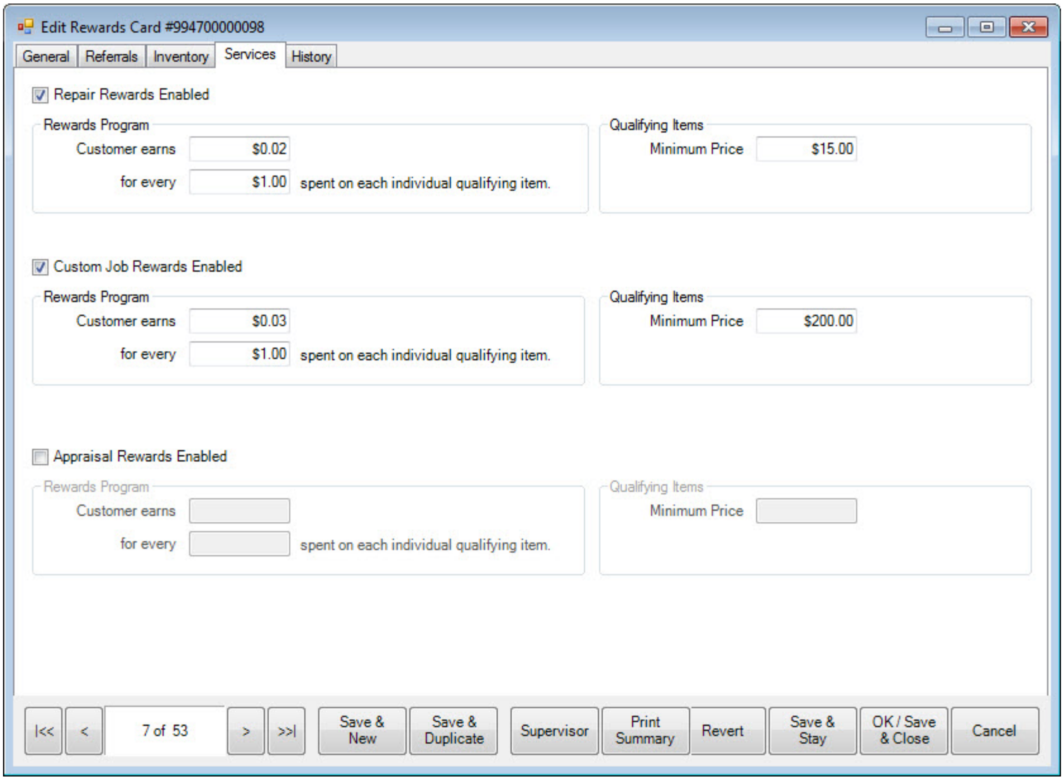
Max Item Discount 5.00 %

The **Inventory** tab spells out the earnings for inventory purchases, as opposed to services purchases. Fields and options in the **Inventory** tab include:

Inventory Enabled	Whether inventory sales will count toward referrals. The default tier will allow more specific inventory types.
Customer Earns…	How much the customer earns for each qualifying purchase.
For every	The basis against which the earnings will be calculated.

Minimum Price	For rewards to be awarded for the purchase of an item, the item must not cost less than this amount.
Max Item Discount	For rewards to be awarded for the purchase of an item, the item must not be discounted by more than this amount.

6. Make changes to the fields in the **Inventory** tab as needed and select the **Services** tab.



Edit Rewards Card #994700000098

☑ Repair Rewards Enabled

Rewards Program
Customer earns $0.02
for every $1.00 spent on each individual qualifying item.

Qualifying Items
Minimum Price $15.00

☑ Custom Job Rewards Enabled

Rewards Program
Customer earns $0.03
for every $1.00 spent on each individual qualifying item.

Qualifying Items
Minimum Price $200.00

☐ Appraisal Rewards Enabled

Rewards Program
Customer earns
for every spent on each individual qualifying item.

Qualifying Items
Minimum Price

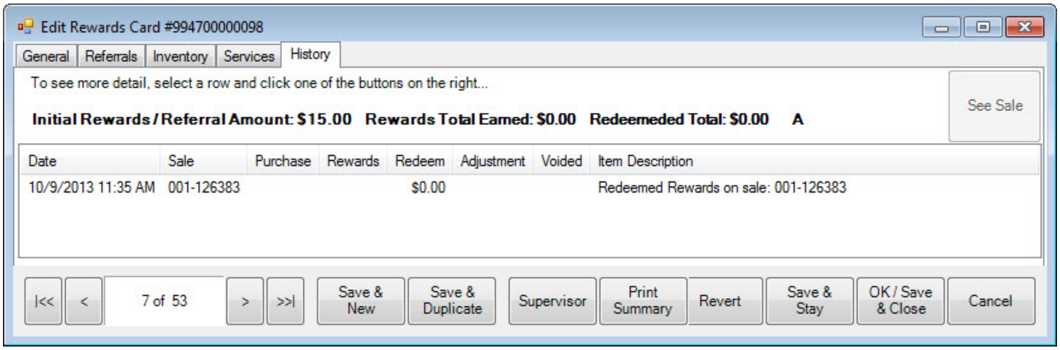
Fields and options in the **Services** tab include:

Repair Rewards Enabled	Indicates that rewards and referrals can be accrued on repairs.

Customer Earns	How much the customer earns for each qualifying purchase.
For every spent on each qualifying purchase	The basis against which the earnings will be calculated.
Minimum Purchase	For rewards to be awarded for the purchase of an item, the item must not cost less than this amount.

Custom Job Rewards Enabled	Indicates that rewards and referrals can be accrued on custom jobs.
Appraisal Rewards Enabled	Indicates that rewards and referrals can be accrued on appraisals.

7. Make changes to the inventory options as needed and select the **History** tab, which contains a history of card activity. It cannot be edited.



To see more detail, select a row and click one of the buttons on the right...

Initial Rewards / Referral Amount: $15.00 Rewards Total Earned: $0.00 Redeemeded Total: $0.00 A

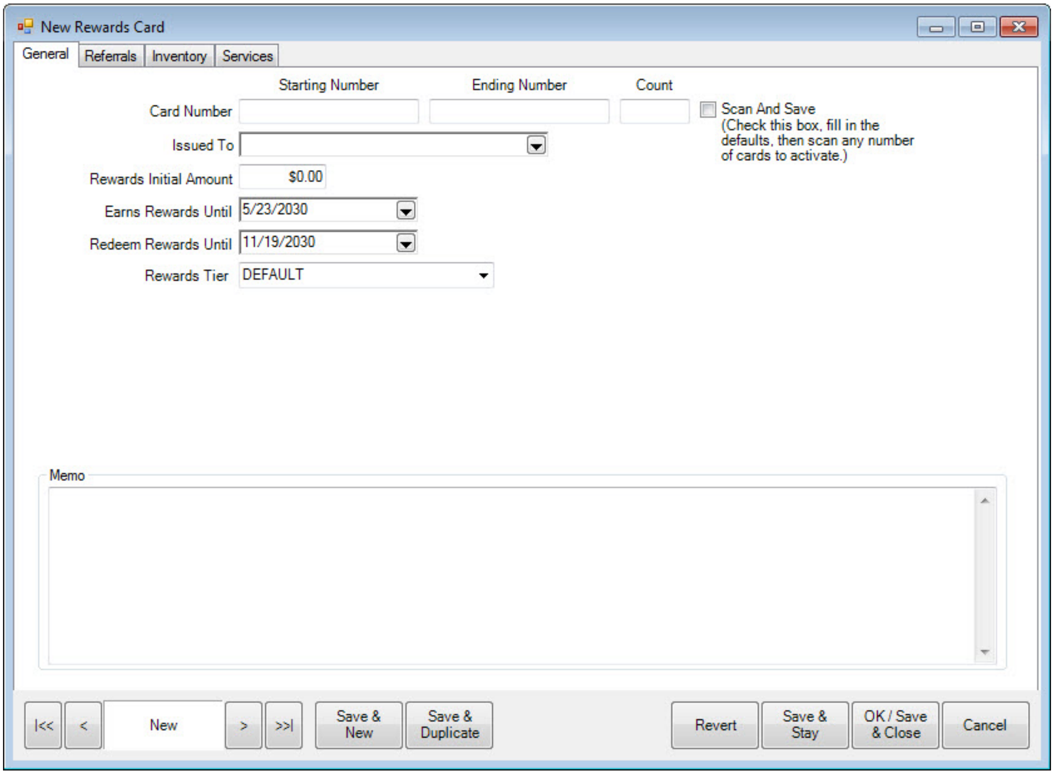
Date	Sale	Purchase	Rewards	Redeem	Adjustment	Voided	Item Description
10/9/2013 11:35 AM	001-126383			$0.00			Redeemed Rewards on sale: 001-126383

8. When all changes are made, select a save option.

4.13.1 Activating a Rewards Card from Rewards Activation

Reward and referral cards are usually activated at point of sale, but they can be done from the customer record as well. To do so:

1. From the **Customer** menu, select **Rewards ► Activate**. The **New Rewards Card** window will appear with the **General** tab open.



☐ Scan And Save (Check this box, fill in the defaults, then scan any number of cards to activate.)

Rewards Initial Amount: $0.00

Earns Rewards Until: 5/23/2030

Redeem Rewards Until: 11/19/2030

Rewards Tier: DEFAULT

2. With few exceptions, the fields and options are the same as the **Edit Rewards Default Settings**. The default settings will populate the window. Enter or accept values as desired. If you type in an amount that exceeds the maximum specified in **System Options**, an override will be required.

3. Enter a card number in the **Starting Number** field. Alternatively, if you are activating a number of cards with sequential numbering and the same settings, you may enter the **Starting Number** and the **Ending Number**. If you intend to scan the numbers in, select the **Scan and Save** option and begin scanning numbers. These need not be sequential.

- **When creating rewards cards, you do not have to fill in the issued to or referred by customer fields. These can be blank.**
- **If you want to set up a number of rewards cards and then activate them at point of sale with these settings. If you do complete the Issued To customer field and the Referred By customer field, the card will default to a rewards card and will not pay out the referral bonus because it will not be a new customer at this point.**
- **The Rewards/Referrals feature is further detailed in the section entitled Referral Cards.**

To activate a new card for a specific customer, select **Customers ► Rewards ► Find ► Select a Rewards Card**.

4.14 Clienteling

One of the benefits of a customer database like the one you have in The Edge is that you can use the information to build relationships with customers that go beyond passive retail transactions. By using the Clienteling feature, you can view customer history, special anniversaries and dates, and other information to help you reach out to customers and offer services, point out promotions, or remind them of events that will bring them to you. Clienteling is knowing to whom to speak about various events and when. Triggers to initiate a clienteling session include:

- Birthdays
- Anniversaries
- Big Purchase – 180 days
- Big Purchase – 11 months
- Bridal-30 days
- Bridal-60 days
- Bridal-90 days
- Additional bridals.

The Edge produces a form from which the clientelers can work. Presets will be used to produce the appropriate forms each week. The form will contain:

- Contact Information (Name/Address/telephone #/cell #/email address for both the husband and wife)
- Conversational Information (occupations, activities, kids and their activities, pets, etc.)
- Purchase History (preferably with images)
- Items on Wish List with images also when available.

The form will have room for notes as these will be used off-line when phoning customers. All data will be presented even if the field is blank. The clienteler's job changes with the presence or absence of data (i.e., when there is no purchase history or wish items for bridal customer, the clienteler must get in touch with the woman and get her to come into the store. When she is in the store, the clienteler might encourage the woman to select a couple of items to go on her wish list so when the anniversary rolls around they have choices for the husband). If there is a purchase history or wish list items, the clienteler might go after the significant other to plant ideas.

Clientelers are responsible for updating conversational information on an ongoing basis. A **Note** field is used to record conversational info.

To find customers to target for clienteling activities:

1. Select **Customer ► Clienteling**. There you will find a filtering dialog that allows you to filter on two levels.

- The **Customer** drop-down returns the customer find filter. Use it to select target customers for the clienteling campaign.
- The **Purchase History** drop-down offers a filter that looks like item find. Use it to identify meaningful items that will appear for discussion purposes on the clienteling form. For example, you might only be interested in purchased items over $100.

Although the **Purchase History** filter and the **Merchandise** tab of the customer find filter each look like item find, the **Merchandise** tab of the customer find filter is used strictly to select customers (e.g., customers who bought an engagement ring within a certain date range), while the **Purchase History** filter is used strictly to determine which items are shown on the clienteling forms for those selected customers.

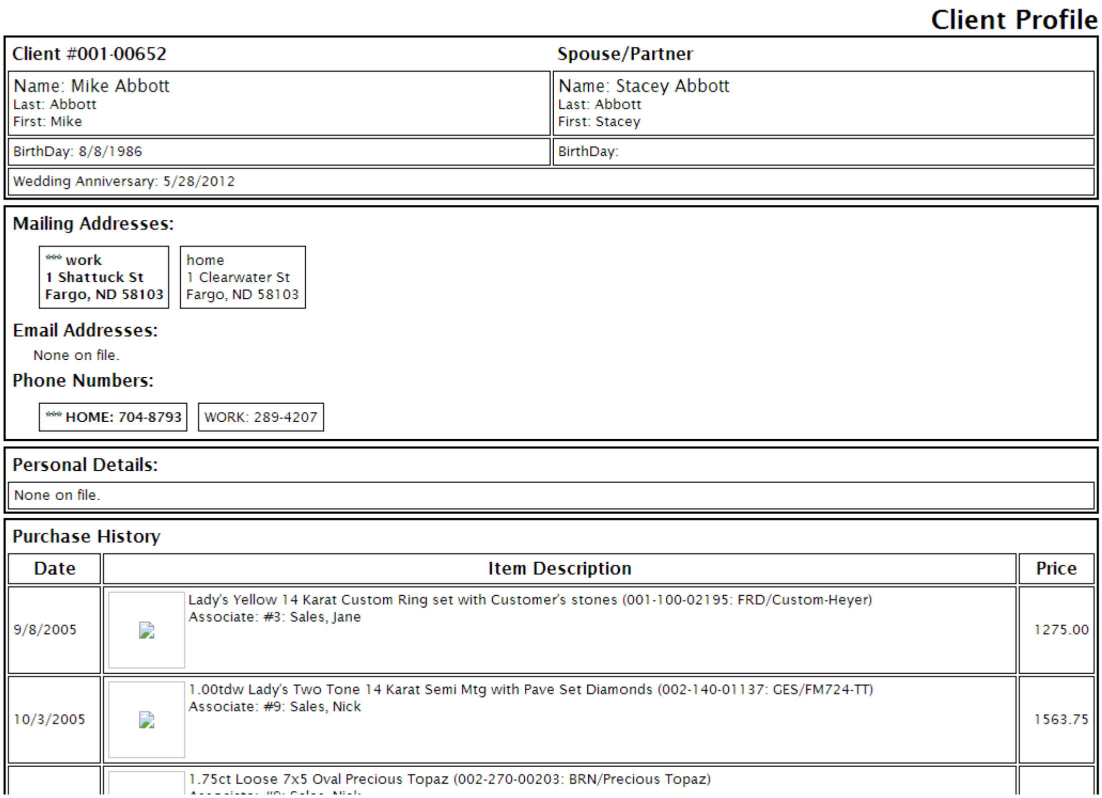
2. Using these filters, create the list of customers you wish to target and list of items to show on the form.

For clienteling, some values are pre-populated based on typical client-building parameters.

3. When the list is returned, it will contain options at the bottom of the window:

Edit	Allows the client record.
Group/Mailing List	Allows you to assign clients to a group or mailing list.
Print Client Profiles	Allows you to print a profile of these clients.

4. To see the profiles, select **Print Client Profiles**. It might take some to generate the profiles. A client profile might look like this:



Client Profile

Client #001-00652	**Spouse/Partner**
Name: Mike Abbott Last: Abbott First: Mike	Name: Stacey Abbott Last: Abbott First: Stacey
BirthDay: 8/8/1986	BirthDay:
Wedding Anniversary: 5/28/2012	

Mailing Addresses:

***** work**
1 Shattuck St
Fargo, ND 58103

home
1 Clearwater St
Fargo, ND 58103

Email Addresses:

None on file.

Phone Numbers:

***** HOME: 704-8793**

WORK: 289-4207

Personal Details:

None on file.

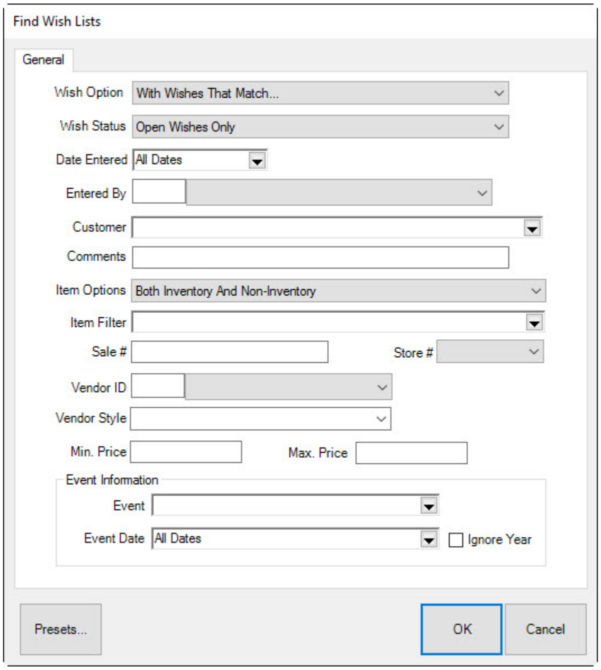
Purchase History

Date		Item Description	Price
9/8/2005		Lady's Yellow 14 Karat Custom Ring set with Customer's stones (001-100-02195: FRD/Custom-Heyer) Associate: #3: Sales, Jane	1275.00
10/3/2005		1.00tdw Lady's Two Tone 14 Karat Semi Mtg with Pave Set Diamonds (002-140-01137: GES/FM724-TT) Associate: #9: Sales, Nick	1563.75
		1.75ct Loose 7x5 Oval Precious Topaz (002-270-00203: BRN/Precious Topaz)	

4.15 Find Wish Lists

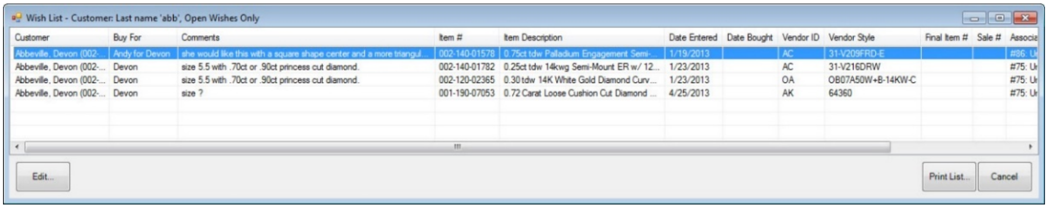
Useful for maintenance, purchasing, follow up calls, etc., you can use this feature to locate customers based on their wish list. To do so:

1. Select **Customer** ▶ **Wish Lists** ▶ **Find**. The **Find Wish Lists** filter will appear.



Wish Option: With Wishes That Match...
Wish Status: Open Wishes Only
Date Entered: All Dates
Entered By:
Customer:
Comments:
Item Options: Both Inventory And Non-Inventory
Item Filter:
Sale #:
Store #:
Vendor ID:
Vendor Style:
Min. Price:
Max. Price:
Event Information
Event:
Event Date: All Dates
☐ Ignore Year

2. Enter parameters that describe the wishes you're looking for. As always, the **Presets** feature allows you to save search parameters for future use. See the section entitled Presets for more information.
3. Select **OK**. A list of customers with matching wish lists will appear.



Wish List - Customer: Last name 'abb', Open Wishes Only

Customer	Buy For	Comments	Item #	Item Description	Date Entered	Date Bought	Vendor ID	Vendor Style	Final Item #	Sale #	Associa
Abbeville, Devon (002-...	Andy for Devon	she would like this with a square shape center and a more triangul...	002-140-01578	0.75ct tdw Palladium Engagement Semi-...	1/19/2013		AC	31-V209FRD-E			#86: U
Abbeville, Devon (002-...	Devon	size 5.5 with .70ct or .90ct princess cut diamond.	002-140-01782	0.25ct tdw 14kwg Semi-Mount ER w/ 12...	1/23/2013		AC	31-V216DRW			#75: U
Abbeville, Devon (002-...	Devon	size 5.5 with .70ct or .90ct princess cut diamond.	002-120-02365	0.30 tdw 14K White Gold Diamond Curv...	1/23/2013		OA	OB07A50W+B-14KW-C			#75: U
Abbeville, Devon (002-...	Devon	size ?	001-190-07053	0.72 Carat Loose Cushion Cut Diamond ...	4/25/2013		AK	64360			#75: U

4. Select **Edit** to edit a wish list record. More detail is provided in the section entitled Wish List.

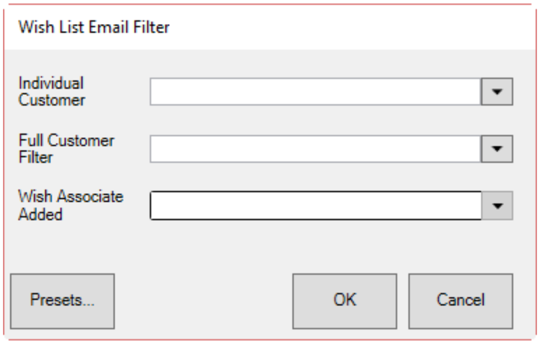
4.15.1 Email Wishes

Wishes taken at point of sale include the option to send a notification to a potential customer. However, using the **Email Wishes** feature in the **Customer** area, you can create a mailing for a number of wish lists.

- **This process could take some time to run. You might want to wait until off hours to run it.**
- **The recipient of the list is the person indicated in the original wish creation. Make sure you check the recipient before sending these emails.**

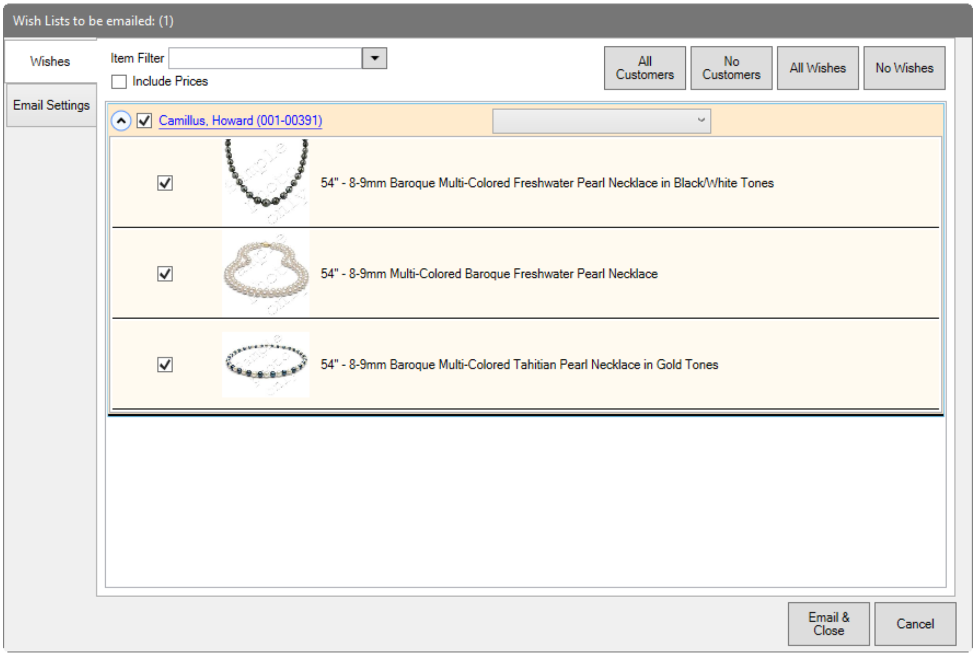
To send wish list emails:

1. Select **Customer ► Wish Lists ► Email Wishes**. The **Wish List Email Filter** will appear.



   You can develop a mailing list for wish list emails in one of three ways:
   - By individual customer
   - By a group of customers
   - By the associate or associates who took the wish.

2. Use the appropriate find filter to create the desired list. A matching list of wishes will appear.
   a. Individual customer. The **Wish Lists to be mailed** window will appear with a list of that customer’s wishes.



☐ Include Prices

☑ Camillus, Howard (001-00391)

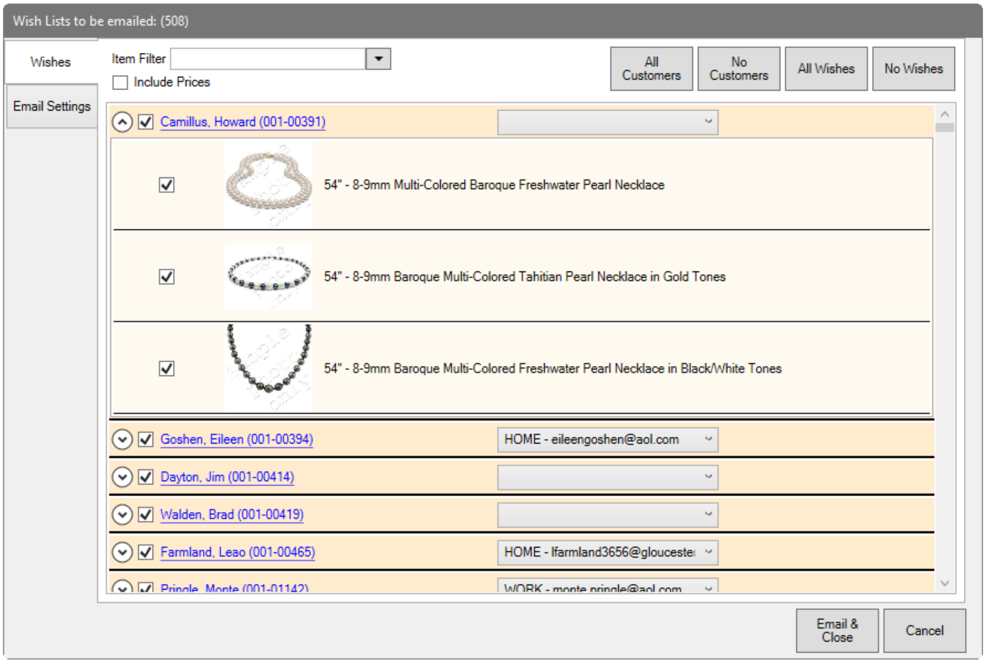
☑ 54" - 8-9mm Baroque Multi-Colored Freshwater Pearl Necklace in Black/White Tones

☑ 54" - 8-9mm Multi-Colored Baroque Freshwater Pearl Necklace

☑ 54" - 8-9mm Baroque Multi-Colored Tahitian Pearl Necklace in Gold Tones

Use the down arrow next to the customer's name to see his or her wishes. By default, the customer's wishes will be checked. Use the checkboxes, **All Wishes** or **No Wishes** to determine what wishes should be emailed.

b. Several customers. The **Wish Lists** to be emailed window will appear with matching customers and their wishes.



☐ Include Prices

☑ Camillus, Howard (001-00391)

☑ 54" - 8-9mm Multi-Colored Baroque Freshwater Pearl Necklace

☑ 54" - 8-9mm Baroque Multi-Colored Tahitian Pearl Necklace in Gold Tones

☑ 54" - 8-9mm Baroque Multi-Colored Freshwater Pearl Necklace in Black/White Tones

☑ Goshen, Eileen (001-00394) HOME - eileengoshen@aol.com

☑ Dayton, Jim (001-00414)

☑ Walden, Brad (001-00419)

☑ Farmland, Leao (001-00465) HOME - lfarmland3656@glouceste

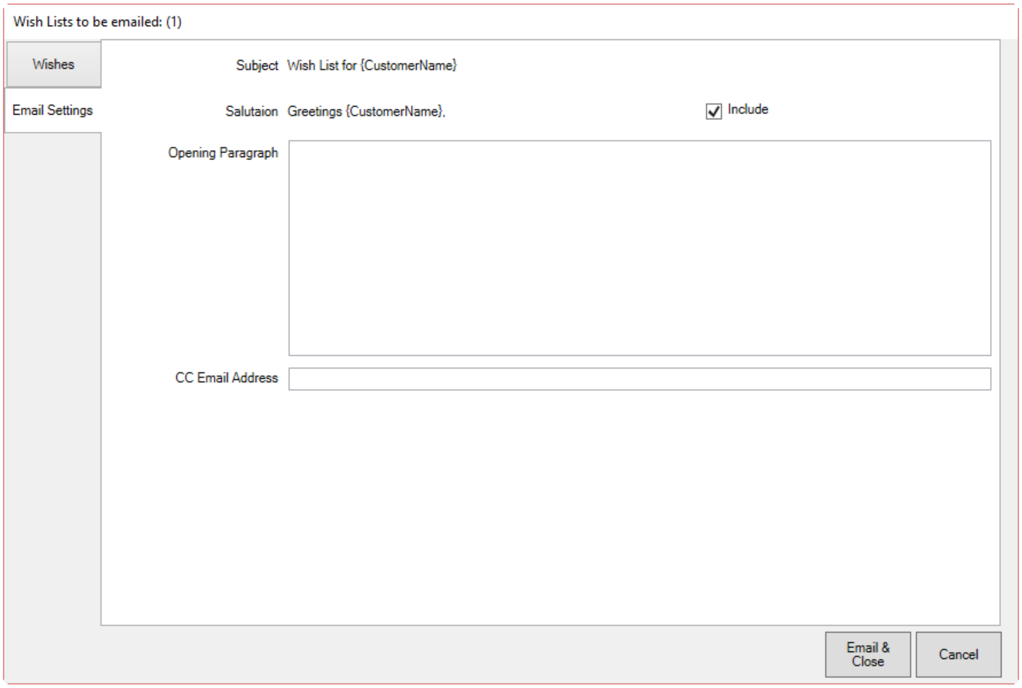
☑ Pringle, Monte (001-01142) WORK - monte.pringle@aol.com

Using the down arrows next to each customer’s name, you can see his or her specific wishes. By default, all customers and all wishes will be checked. Use the checkboxes, **All Customers**, **No Customers**, **All Wishes**, and **No Wishes** to specify which emails to send.

You can use the Wishes tab of the find filter to build the list.

c. By associate. Use the **Associate** drop-down from the **Wish List Email Filter** to select the associates whose customers’ wishes you want to send. The **Wish Lists to be emailed** window will open. It works just like the results using several customers. Make your selections.

3. Select the **Email Settings** tab to set up the email template.


Wish Lists to be emailed: (1)

Subject Wish List for {CustomerName}

Salutaion Greetings {CustomerName}, ☑ Include

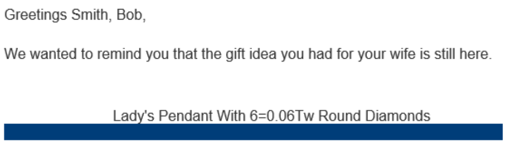
Opening Paragraph

CC Email Address

The Edge will complete the name and email address for selected recipients when the emails are sent. Note that email headers, footers, and greetings are set in **Administrative ► Notifications**, so opening text is optional. For more information, see the section entitled Notifications**.**

4. Select **Include** to include the salutation shown.
5. If desired, enter additional or custom text for an opening paragraph.
6. Enter an additional email address if desired. Use a semicolon to separate multiple entries.
7. When all selections and settings are complete, select **Email & Close**. The emails will be sent.

A sample wish list email might appear as follows.


Greetings Smith, Bob,

We wanted to remind you that the gift idea you had for your wife is still here.

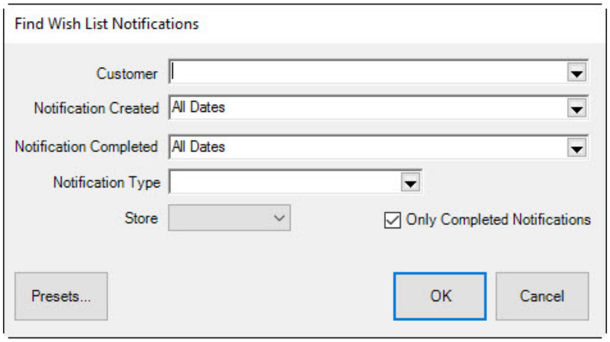
Lady's Pendant With 6=0.06Tw Round Diamonds

4.15.2 Wish List Notifications

You may want to review notifications about wish list activities. This feature allows you to find the notifications concerning wish list items. For notifications about services, see the section entitled Service Job Notifications.

To work with wish list notifications:

1. Select **Customer** ▶ **Wish Lists** ▶ **Notifications** ▶ **Find**. The **Find Wish List Notifications** filter will appear.

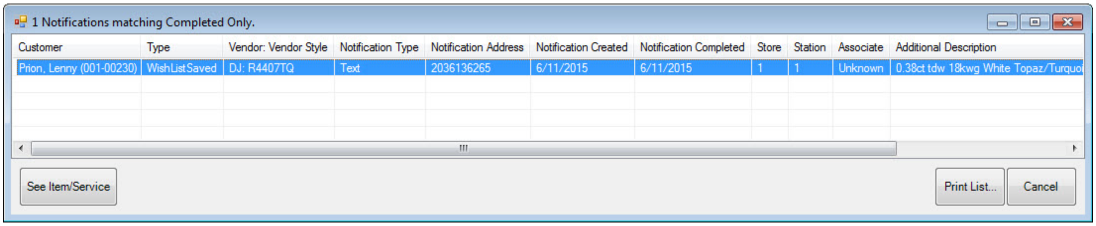


Customer:
Notification Created: All Dates
Notification Completed: All Dates
Notification Type:
Store:
☑ Only Completed Notifications

Fields and options in the **Find Wish List Notifications** filter include:

Customer	Returns records of notifications sent to specified customers.
Notification Created	Returns notifications containing the specified creation date.
Notification Completed	Returns notifications containing the specified sent date.
Notification Type	Returns notifications with the specified type: text message or phone call.
Store	Returns notifications with the matching originating store.
Only Completed Notifications	Returns records containing only completed notifications.

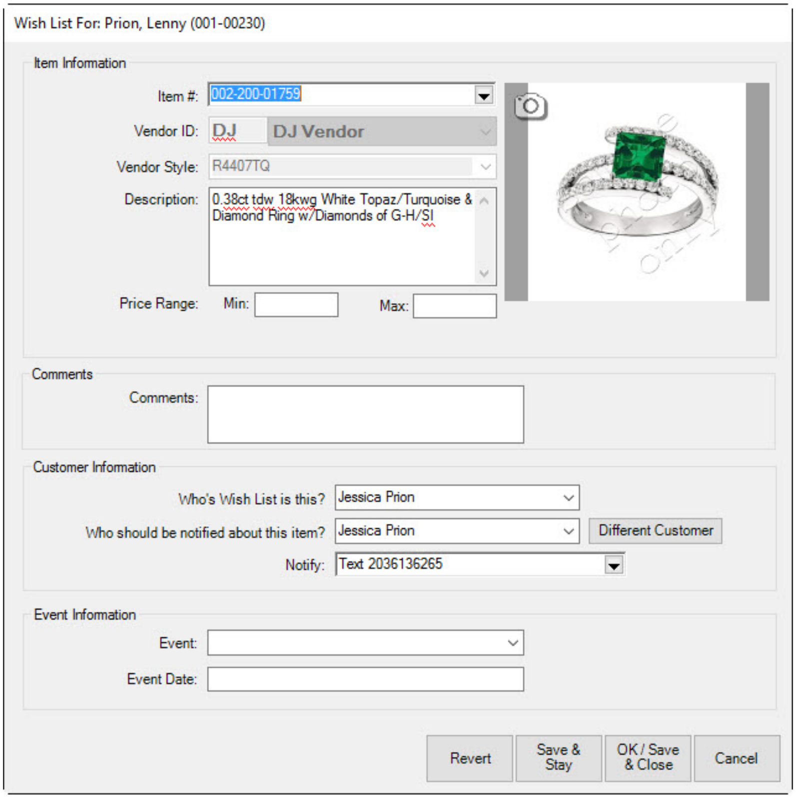
2. Make filter selections as desired.
3. Select **OK**. A list of matching notifications will appear.



1 Notifications matching Completed Only.

Customer	Type	Vendor: Vendor Style	Notification Type	Notification Address	Notification Created	Notification Completed	Store	Station	Associate	Additional Description
Prion, Lenny (001-00230)	WishListSaved	DJ: R4407TQ	Text	2036136265	6/11/2015	6/11/2015	1	1	Unknown	0.38ct tdw 18kwg White Topaz/Turquoi

4. To work with a record, select **See Item/Service**. The **Wish List** item record will appear.



Wish List For: Prion, Lenny (001-00230)

Item #: 002-200-01759

Vendor ID: DJ DJ Vendor

Vendor Style: R4407TQ

Description: 0.38ct tdw 18kwg White Topaz/Turquoise & Diamond Ring w/Diamonds of G-H/SI

Who's Wish List is this? Jessica Prion

Who should be notified about this item? Jessica Prion

Notify: Text 2036136265

5. Make changes to the record as desired.
6. Select **OK/Save and Close**. You will be prompted to send a notification that the wish list was updated.
7. Select **Yes** or **No**. If yes, The Edge will send the notification.

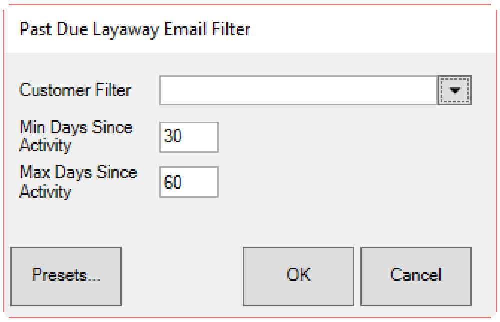
4.16 Email Layaway Reminders

You may notice that customers are putting things on layaway and not following up. Using the Layaway Email feature, you can locate layaways that are inactive and remind customers about them.

This process could take some time to run. You might want to wait until off hours to run it.

To send layaway emails:

1. Select **Customer ► Layaway Inactivity**. The **Past Due Layaway Email Filter** will appear.

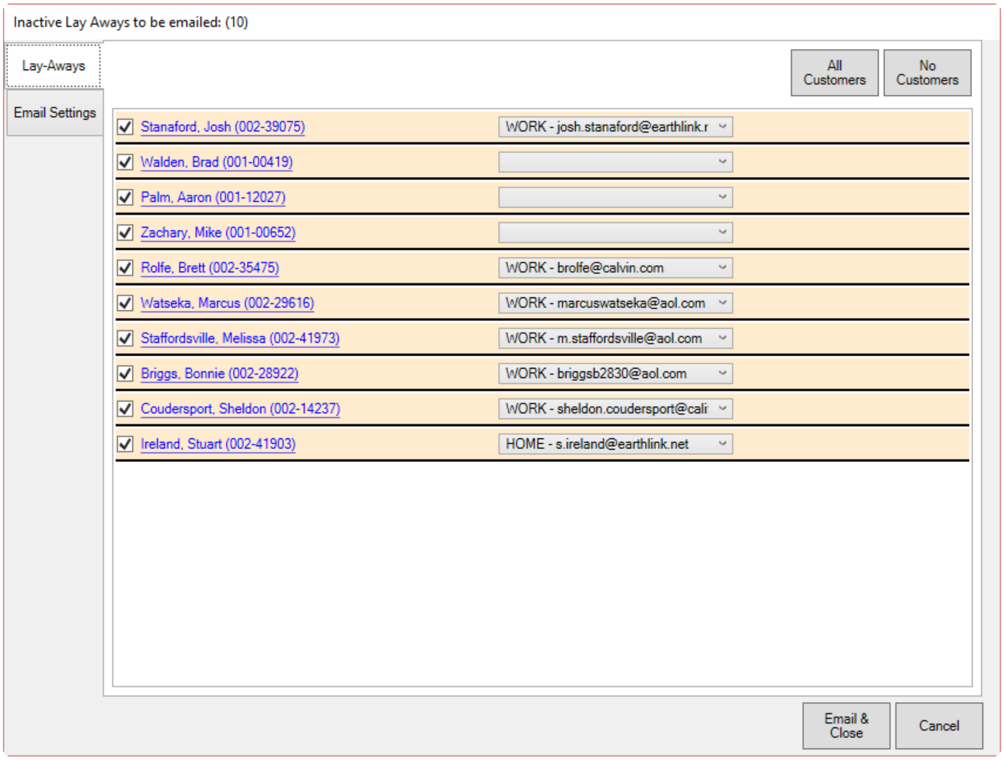


Customer Filter:
Min Days Since Activity: 30
Max Days Since Activity: 60

Fields and options in the **Past Due Layaway Email Filter** include:

Customer Filter	Returns records of layaways for the specified customers.
Min Days Since Activity	Returns records of layaways that haven't had any payment or other activity for at least this number of days. For example, you only want to see records for layaways that have not had activity for at least 30 days (which is the default).
Max Days Since Activity	Returns records of layaways that haven't had any payment or other activity for at most this number of days. For example, you only want to exclude records for layaways that have not had activity for more than 60 days (which is the default) so you can create a window. By running the filter for more than one window, you can assign a different email, e.g., one with more emphasis.

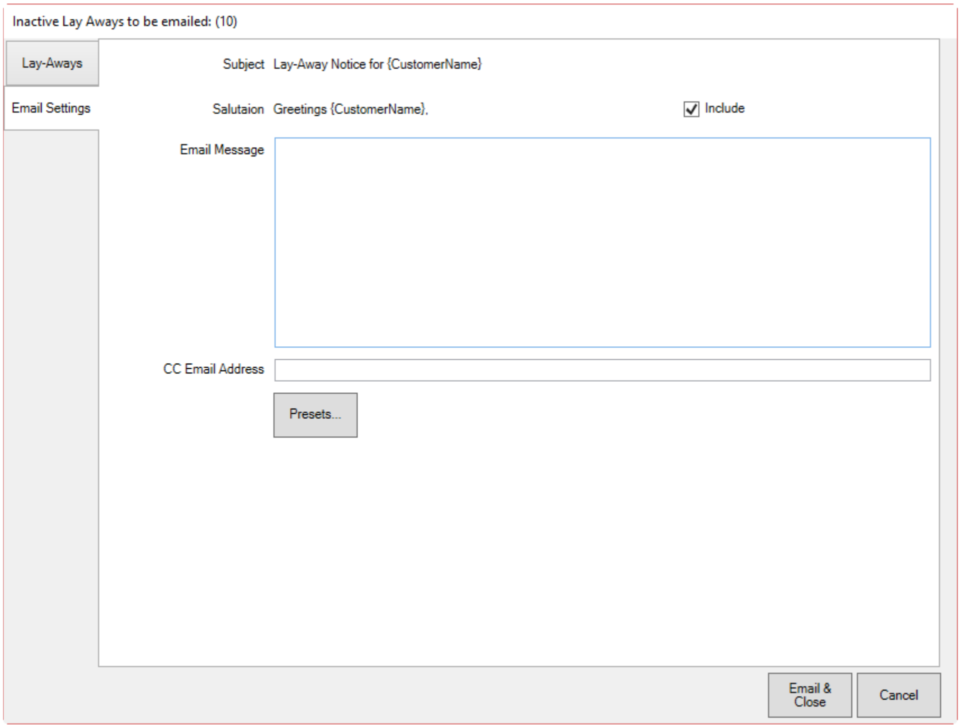
2. Use the **Customer Filter** to specify customers to contact.
3. Change minimum and maximum dates if desired.
4. Select **OK**. The **Inactive Layaways to be Emailed** window will appear.



Inactive Lay Aways to be emailed: (10)

☑ Stanaford, Josh (002-39075)	WORK - josh.stanaford@earthlink.r
☑ Walden, Brad (001-00419)	
☑ Palm, Aaron (001-12027)	
☑ Zachary, Mike (001-00652)	
☑ Rolfe, Brett (002-35475)	WORK - brolfe@calvin.com
☑ Watseka, Marcus (002-29616)	WORK - marcuswatseka@aol.com
☑ Staffordsville, Melissa (002-41973)	WORK - m.staffordsville@aol.com
☑ Briggs, Bonnie (002-28922)	WORK - briggsb2830@aol.com
☑ Coudersport, Sheldon (002-14237)	WORK - sheldon.coudersport@cali
☑ Ireland, Stuart (002-41903)	HOME - s.ireland@earthlink.net

5. For each record, indicate whether to include the customer in the mailing. Note that if there is no preferred email address, the email will be blank. Use the drop-down menu to select an email or select the customer name to add an email address.
6. Select the **Email Settings** tab to set up the email template.



Inactive Lay Aways to be emailed: (10)

Subject: Lay-Away Notice for {CustomerName}

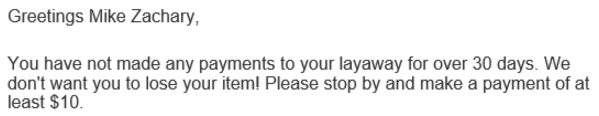
Salutaion: Greetings {CustomerName},

☑ Include

The Edge will complete the name and email address for selected recipients when the emails are sent. Note that email headers, footers, and greetings are set in **Administrative ► Notifications**, but opening text is still needed. For more information about email setup, see the section entitled Notifications**.**

7. Select **Include** to include the salutation shown.
8. Enter the message.
9. Enter an additional email address if desired. Use a semicolon to separate multiple entries.
10. When all selections and settings are complete, select **Email & Close**. The emails will be sent.

A sample wish list email might appear as follows.



Greetings Mike Zachary,

You have not made any payments to your layaway for over 30 days. We don't want you to lose your item! Please stop by and make a payment of at least $10.

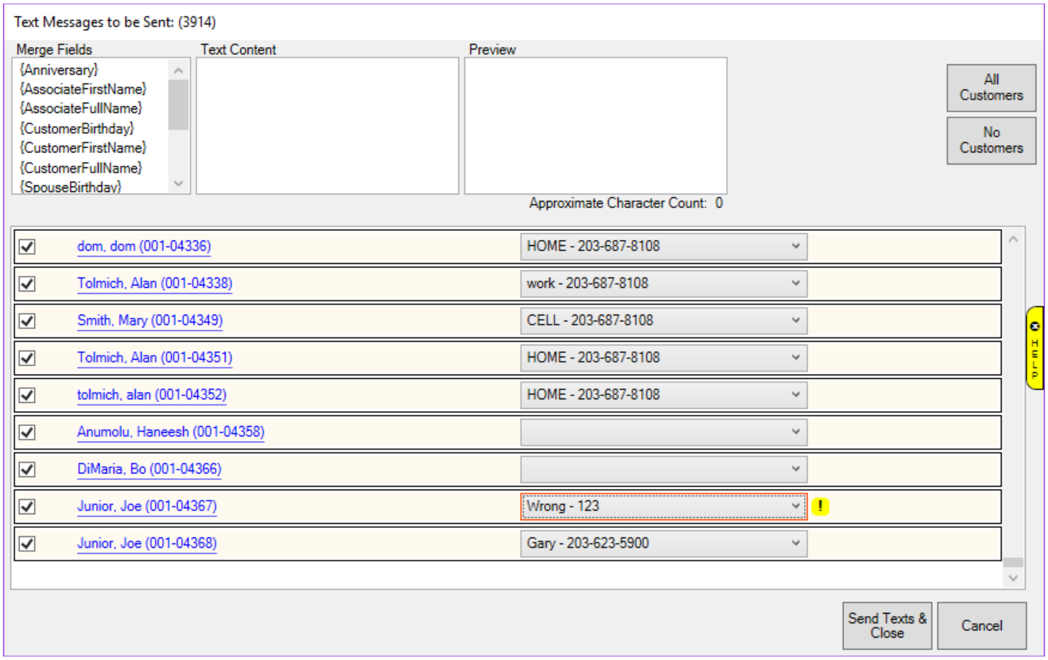
4.17 Text Message Marketing

Much like email marketing, you can use text messaging to send customers texts about available products, sale items, and reminders.

This process could take some time to run. You might want to wait until off hours to run it.

To create a new text message:

1. Select **Customer ► Text Message Marketing**. The **Customer Find** filter will appear.
2. Using the **Customer Find** filter, specify the customers to whom you wish to send the text. Note that by making use of the filter options and building more specific texts, you can refine your campaign well. Based on the results, the **Text Messages to be Sent** window will appear with a listing of contacts.



Text Messages to be Sent: (3914)

Merge Fields
{Anniversary}
{AssociateFirstName}
{AssociateFullName}
{CustomerBirthday}
{CustomerFirstName}
{CustomerFullName}
{SpouseBirthday}

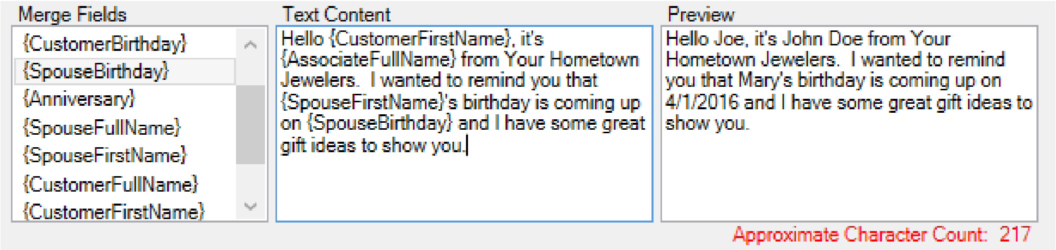
Approximate Character Count: 0

☑	dom, dom (001-04336)	HOME - 203-687-8108
☑	Tolmich, Alan (001-04338)	work - 203-687-8108
☑	Smith, Mary (001-04349)	CELL - 203-687-8108
☑	Tolmich, Alan (001-04351)	HOME - 203-687-8108
☑	tolmich, alan (001-04352)	HOME - 203-687-8108
☑	Anumolu, Haneesh (001-04358)	
☑	DiMaria, Bo (001-04366)	
☑	Junior, Joe (001-04367)	Wrong - 123
☑	Junior, Joe (001-04368)	Gary - 203-623-5900

3. Check the list and select phone numbers for each recipient. The preferred number is offered. Results with missing or invalid numbers will be outlined in red. These must be resolved or a message will not be sent. Notice that every customer has a hyperlink to the customer record so you can update contact information.

To prevent spamming, SMS carriers may limit the number of text messages you can send at a time. We recommend you send fewer than 1,000 text messages per day and even send them in batches of less than 200. If you must send more, contact The Edge Technical Support team for assistance.

4. Using the message fields at the top, write the text message.



Hello {CustomerFirstName}, it's {AssociateFullName} from Your Hometown Jewelers. I wanted to remind you that {SpouseFirstName}'s birthday is coming up on {SpouseBirthday} and I have some great gift ideas to show you.

Hello Joe, it's John Doe from Your Hometown Jewelers. I wanted to remind you that Mary's birthday is coming up on 4/1/2016 and I have some great gift ideas to show you.

Approximate Character Count: 217

   a. Use the merge fields to have The Edge pull actual values from the customer record and place them into the text message as selected.
   b. Enter text for the message. When you come to a place for custom information, select the **Merge Field** you wish to insert.
   c. Continue entering text.
   d. Use the **Preview** field to see an example of how the final text will appear. Add punctuation and spaces as needed.

If the character count goes over 160, your messages will be divided into two or more separate messages and will be treated as such for the purposes of text message charges. Further, notice that the preview uses dummy text for merge fields; actual values may be longer. Be sure to allow for additional characters when approaching the character count.

   e. You can include hyperlinks in the body of the text as well.

5. When you are sure of the recipients and the text, select **Send Texts & Close**. The messages will be sent.

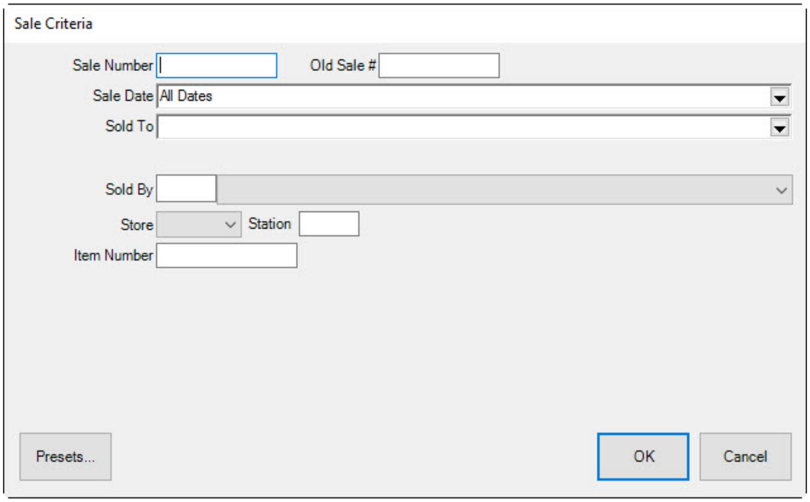
A history of texts sent will be recorded in **Administrative ► Notifications ► Text Message Administration** and in the customer record **Activity** tab.

4.18 Find Sales

You can find sales to work with history or returns. For a video tutorial about working with sales transaction record filters, go to http://www.screencast.com/t/JktYkvvS.

To find a list of sales:

1. **Go to Customer ► Sales ► Find**. The **Sale Criteria** window will appear. This is also available from the **Point of Sale** window.



Sale Criteria

Sale Number

Old Sale #

Sale Date All Dates

Sold To

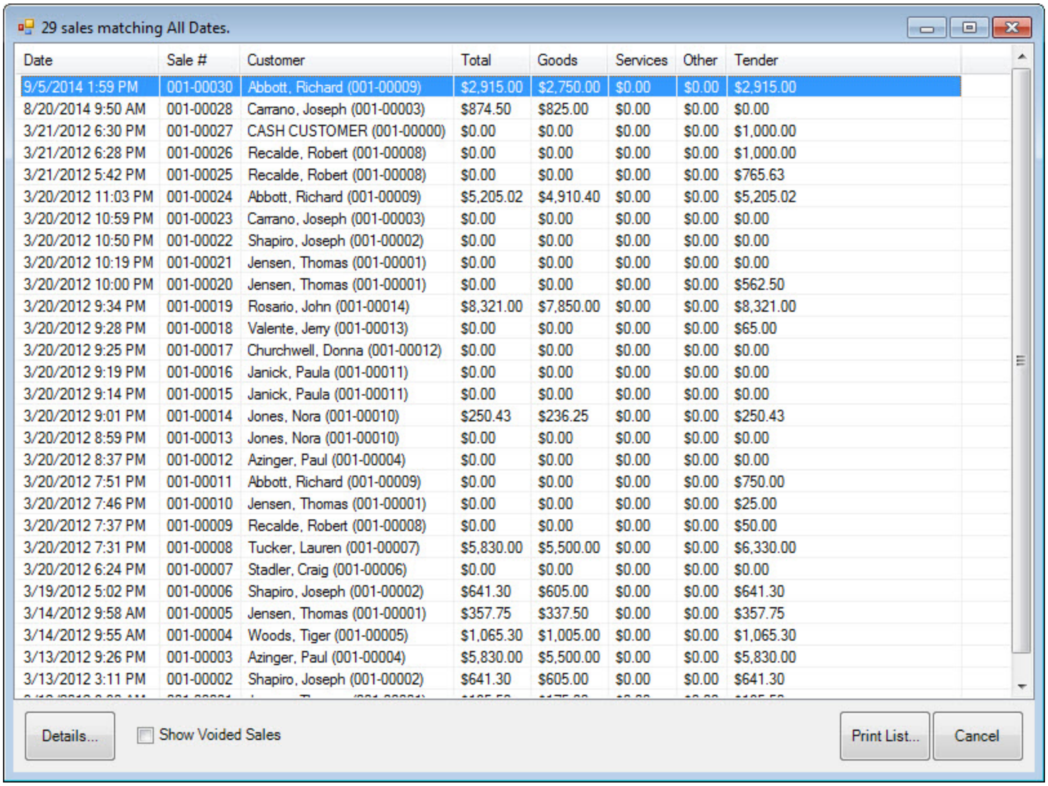
Sold By

Store

Station

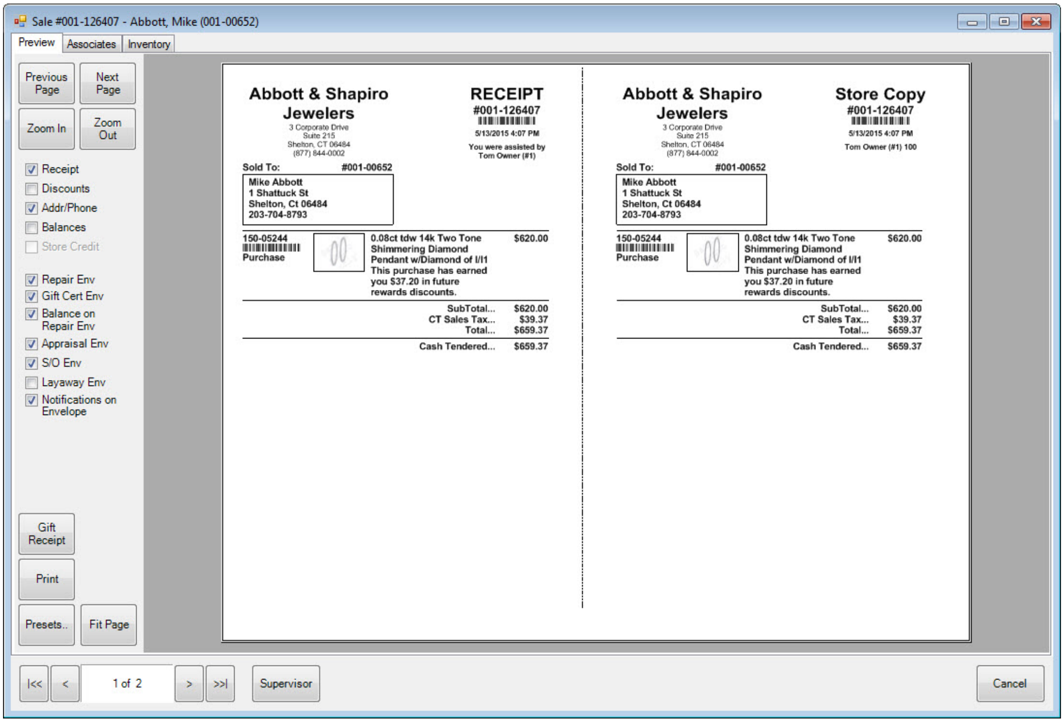
Item Number

2. Narrow your criteria by entering a sale number, sale date or range of dates, customer name, sales associate name, store number, station number, station name, or item number.
3. Select **OK**. A list of matching sales records will appear.



Date	Sale #	Customer	Total	Goods	Services	Other	Tender
9/5/2014 1:59 PM	001-00030	Abbott, Richard (001-00009)	$2,915.00	$2,750.00	$0.00	$0.00	$2,915.00
8/20/2014 9:50 AM	001-00028	Carrano, Joseph (001-00003)	$874.50	$825.00	$0.00	$0.00	$0.00
3/21/2012 6:30 PM	001-00027	CASH CUSTOMER (001-00000)	$0.00	$0.00	$0.00	$0.00	$1,000.00
3/21/2012 6:28 PM	001-00026	Recalde, Robert (001-00008)	$0.00	$0.00	$0.00	$0.00	$1,000.00
3/21/2012 5:42 PM	001-00025	Recalde, Robert (001-00008)	$0.00	$0.00	$0.00	$0.00	$765.63
3/20/2012 11:03 PM	001-00024	Abbott, Richard (001-00009)	$5,205.02	$4,910.40	$0.00	$0.00	$5,205.02
3/20/2012 10:59 PM	001-00023	Carrano, Joseph (001-00003)	$0.00	$0.00	$0.00	$0.00	$0.00
3/20/2012 10:50 PM	001-00022	Shapiro, Joseph (001-00002)	$0.00	$0.00	$0.00	$0.00	$0.00
3/20/2012 10:19 PM	001-00021	Jensen, Thomas (001-00001)	$0.00	$0.00	$0.00	$0.00	$0.00
3/20/2012 10:00 PM	001-00020	Jensen, Thomas (001-00001)	$0.00	$0.00	$0.00	$0.00	$562.50
3/20/2012 9:34 PM	001-00019	Rosario, John (001-00014)	$8,321.00	$7,850.00	$0.00	$0.00	$8,321.00
3/20/2012 9:28 PM	001-00018	Valente, Jerry (001-00013)	$0.00	$0.00	$0.00	$0.00	$65.00
3/20/2012 9:25 PM	001-00017	Churchwell, Donna (001-00012)	$0.00	$0.00	$0.00	$0.00	$0.00
3/20/2012 9:19 PM	001-00016	Janick, Paula (001-00011)	$0.00	$0.00	$0.00	$0.00	$0.00
3/20/2012 9:14 PM	001-00015	Janick, Paula (001-00011)	$0.00	$0.00	$0.00	$0.00	$0.00
3/20/2012 9:01 PM	001-00014	Jones, Nora (001-00010)	$250.43	$236.25	$0.00	$0.00	$250.43
3/20/2012 8:59 PM	001-00013	Jones, Nora (001-00010)	$0.00	$0.00	$0.00	$0.00	$0.00
3/20/2012 8:37 PM	001-00012	Azinger, Paul (001-00004)	$0.00	$0.00	$0.00	$0.00	$0.00
3/20/2012 7:51 PM	001-00011	Abbott, Richard (001-00009)	$0.00	$0.00	$0.00	$0.00	$750.00
3/20/2012 7:46 PM	001-00010	Jensen, Thomas (001-00001)	$0.00	$0.00	$0.00	$0.00	$25.00
3/20/2012 7:37 PM	001-00009	Recalde, Robert (001-00008)	$0.00	$0.00	$0.00	$0.00	$50.00
3/20/2012 7:31 PM	001-00008	Tucker, Lauren (001-00007)	$5,830.00	$5,500.00	$0.00	$0.00	$6,330.00
3/20/2012 6:24 PM	001-00007	Stadler, Craig (001-00006)	$0.00	$0.00	$0.00	$0.00	$0.00
3/19/2012 5:02 PM	001-00006	Shapiro, Joseph (001-00002)	$641.30	$605.00	$0.00	$0.00	$641.30
3/14/2012 9:58 AM	001-00005	Jensen, Thomas (001-00001)	$357.75	$337.50	$0.00	$0.00	$357.75
3/14/2012 9:55 AM	001-00004	Woods, Tiger (001-00005)	$1,065.30	$1,005.00	$0.00	$0.00	$1,065.30
3/13/2012 9:26 PM	001-00003	Azinger, Paul (001-00004)	$5,830.00	$5,500.00	$0.00	$0.00	$5,830.00
3/13/2012 3:11 PM	001-00002	Shapiro, Joseph (001-00002)	$641.30	$605.00	$0.00	$0.00	$641.30

4. To print the list, select **Print List…**.
5. To include voided sales, select **Show Voided Sales**.
6. To review the sales receipt for an item, double-click on a particular record or highlight a record and select **Details…**. A preview of the receipt like the one shown during point of sale will appear. See the section entitled Review Receipts for more information.



☑ Receipt
☐ Discounts
☑ Addr/Phone
☐ Balances
☐ Store Credit
☑ Repair Env
☑ Gift Cert Env
☑ Balance on Repair Env
☑ Appraisal Env
☑ S/O Env
☐ Layaway Env
☑ Notifications on Envelope

Abbott & Shapiro Jewelers
3 Corporate Drive
Suite 215
Shelton, CT 06484
(877) 844-0002

RECEIPT
#001-126407
5/13/2015 4:07 PM
You were assisted by
Tom Owner (#1)

Sold To: #001-00652
Mike Abbott
1 Shattuck St
Shelton, Ct 06484
203-704-8793

150-05244
Purchase
0.08ct tdw 14k Two Tone Shimmering Diamond Pendant w/Diamond of I/I1 This purchase has earned you $37.20 in future rewards discounts. $620.00

SubTotal... $620.00
CT Sales Tax... $39.37
Total... $659.37
Cash Tendered... $659.37

Abbott & Shapiro Jewelers
3 Corporate Drive
Suite 215
Shelton, CT 06484
(877) 844-0002

Store Copy
#001-126407
5/13/2015 4:07 PM
Tom Owner (#1) 100

Sold To: #001-00652
Mike Abbott
1 Shattuck St
Shelton, Ct 06484
203-704-8793

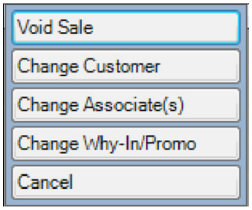
150-05244
Purchase
0.08ct tdw 14k Two Tone Shimmering Diamond Pendant w/Diamond of I/I1 This purchase has earned you $37.20 in future rewards discounts. $620.00

SubTotal... $620.00
CT Sales Tax... $39.37
Total... $659.37
Cash Tendered... $659.37

7. To take action on this sale, use the **Supervisor** menu. See the section entitled Find Sales Supervisor Options.

4.18.1 Find Sales Supervisor Options

Notice that the **Record Navigation Bar** includes a **Supervisor** option. Selecting this option will return a drop-down list of actions.



Void Sale	Voids the sale and presents the receipt again listing each entry as void. You can void a transaction that included a trade-in provided the traded-in item is still in the original category in inventory or not yet taken in as inventory. **For record-keeping purposes, we recommend reversing a sale rather than voiding it.** • **If a statement period has been closed, the void button may not be available on a store charge.** • **Posting to QuickBooks will include voiding transactions, but the check and credit card payments are not removed. They will appear as refunds due.**
Change Customer	Offers the **Find Customer** filter to assign the new customer. You will be offered a dialog box confirming the action.
Change Associates	Offers the **ID The Associate(s)** window, as seen in the section entitled Starting a New Transaction. This allows you to enter a new associate ID or split the credit among associates.
Change Why-In/ Promo	Allows a supervisor to change the reason for the customer's visit.
Cancel	Ends the supervisor options.

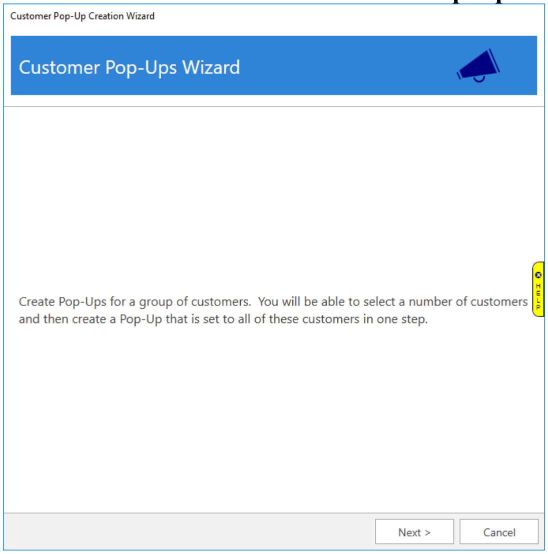
4.19 Wizards

4.19.1 Mass Pop-Ups

This feature allows you to create a Pop-Up and apply it to a selection of customers.

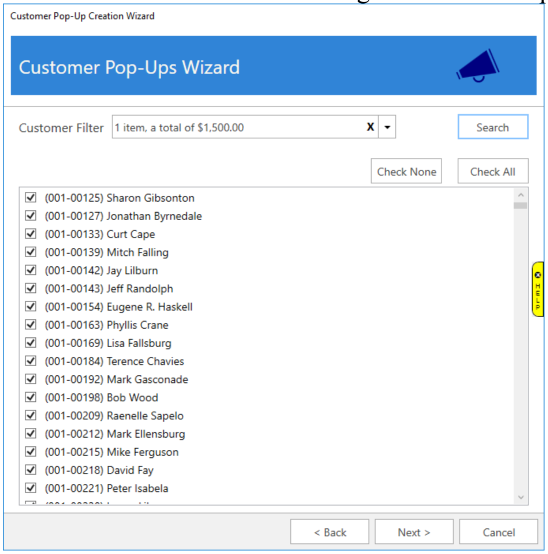
To use Mass Pop-Ups:

1. Click **Customer** ► **Wizards** ► **Mass Pop-Ups**. The **Customer Pop-Ups Wizard** will appear.



Create Pop-Ups for a group of customers. You will be able to select a number of customers and then create a Pop-Up that is set to all of these customers in one step.

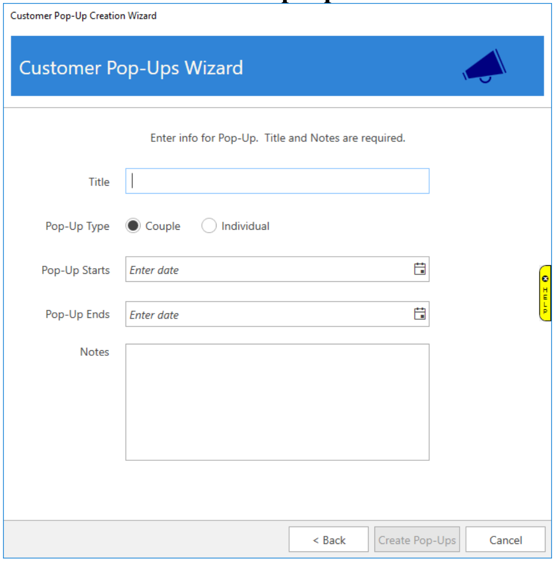
2. Click **Next**. Use the **Customer Filter** drop-down to enter criteria to find customers and click the **Search** button. A list of matching customers will populate the lower portion of the window.



Customer Filter: 1 item, a total of $1,500.00

- ☑ (001-00125) Sharon Gibsonton
- ☑ (001-00127) Jonathan Byrnedale
- ☑ (001-00133) Curt Cape
- ☑ (001-00139) Mitch Falling
- ☑ (001-00142) Jay Lilburn
- ☑ (001-00143) Jeff Randolph
- ☑ (001-00154) Eugene R. Haskell
- ☑ (001-00163) Phyllis Crane
- ☑ (001-00169) Lisa Fallsburg
- ☑ (001-00184) Terence Chavies
- ☑ (001-00192) Mark Gasconade
- ☑ (001-00198) Bob Wood
- ☑ (001-00209) Raenelle Sapelo
- ☑ (001-00212) Mark Ellensburg
- ☑ (001-00215) Mike Ferguson
- ☑ (001-00218) David Fay
- ☑ (001-00221) Peter Isabela

3. Select the customers you wish to include and click **Next**.
4. Enter a **Title**, choose whether the Pop-Up applies to **Couple** or **Individual**, set your dates, and enter **Notes**. See **Customer Pop-Ups Tab** for more information.



Enter info for Pop-Up. Title and Notes are required.

Title

Pop-Up Type ● Couple ○ Individual

Pop-Up Starts *Enter date*

Pop-Up Ends *Enter date*

Notes

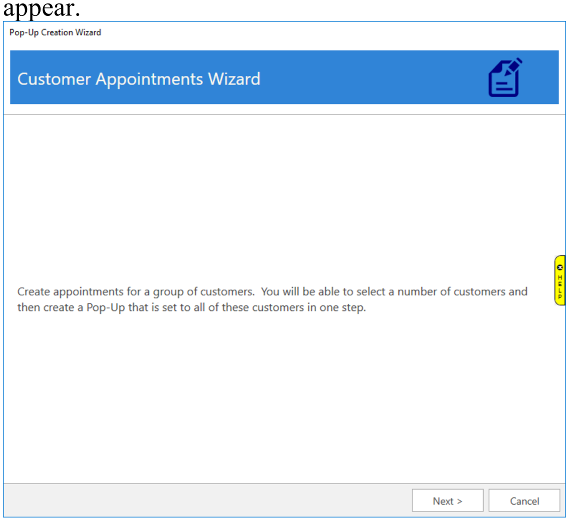
5. Click **Create Pop-Ups** to add these to the selected customers.

4.19.2 Mass Appointments

This feature allows you to create an appointment and assign it to a selection of customers.

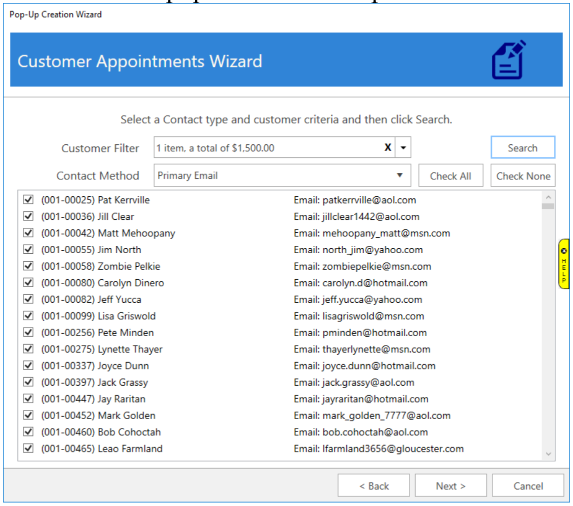
To use Mass Appointments:

1. Click **Customer ▶ Wizards ▶ Mass Appointments**. The **Mass Appointments Wizard** will appear.



Create appointments for a group of customers. You will be able to select a number of customers and then create a Pop-Up that is set to all of these customers in one step.

2. Click **Next**. Use the **Customer Filter** drop-down to enter criteria to find customers and the **Contact Method** drop-down to choose contact type, then click the **Search** button. A list of matching customers will populate the lower portion of the window.



Select a Contact type and customer criteria and then click Search.

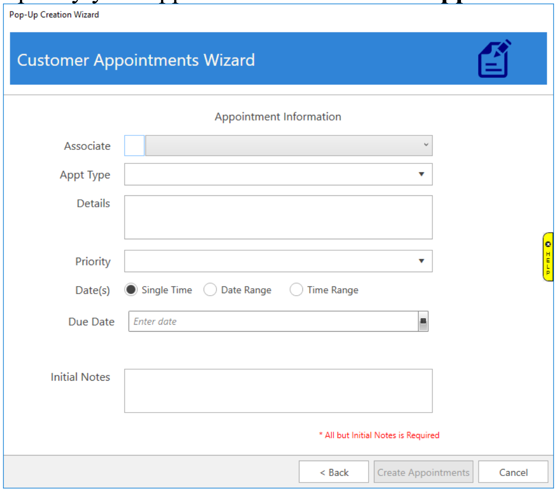
Customer Filter: 1 item, a total of $1,500.00

Contact Method: Primary Email

☑ (001-00025) Pat Kerrville — Email: patkerrville@aol.com
☑ (001-00036) Jill Clear — Email: jillclear1442@aol.com
☑ (001-00042) Matt Mehoopany — Email: mehoopany_matt@msn.com
☑ (001-00055) Jim North — Email: north_jim@yahoo.com
☑ (001-00058) Zombie Pelkie — Email: zombiepelkie@msn.com
☑ (001-00080) Carolyn Dinero — Email: carolyn.d@hotmail.com
☑ (001-00082) Jeff Yucca — Email: jeff.yucca@yahoo.com
☑ (001-00099) Lisa Griswold — Email: lisagriswold@msn.com
☑ (001-00256) Pete Minden — Email: pminden@hotmail.com
☑ (001-00275) Lynette Thayer — Email: thayerlynette@msn.com
☑ (001-00337) Joyce Dunn — Email: joyce.dunn@hotmail.com
☑ (001-00397) Jack Grassy — Email: jack.grassy@aol.com
☑ (001-00447) Jay Raritan — Email: jayraritan@hotmail.com
☑ (001-00452) Mark Golden — Email: mark_golden_7777@aol.com
☑ (001-00460) Bob Cohoctah — Email: bob.cohoctah@aol.com
☑ (001-00465) Leao Farmland — Email: lfarmland3656@gloucester.com

3. Select the customers you wish to include and click **Next**.

4. Specify your appointment details. See **Appointments Tab** for more information on appointments.



5. Click **Create Appointments** to add these to the selected customers.

5 Conducting a Point-of-Sale Transaction

To provide maximum benefit, The Edge's point-of-sale feature is quick and easy to learn and use. We have designed the point-of-sale process around a single window that will keep the learning curve to a minimum and encourage everyone to use it as intended.

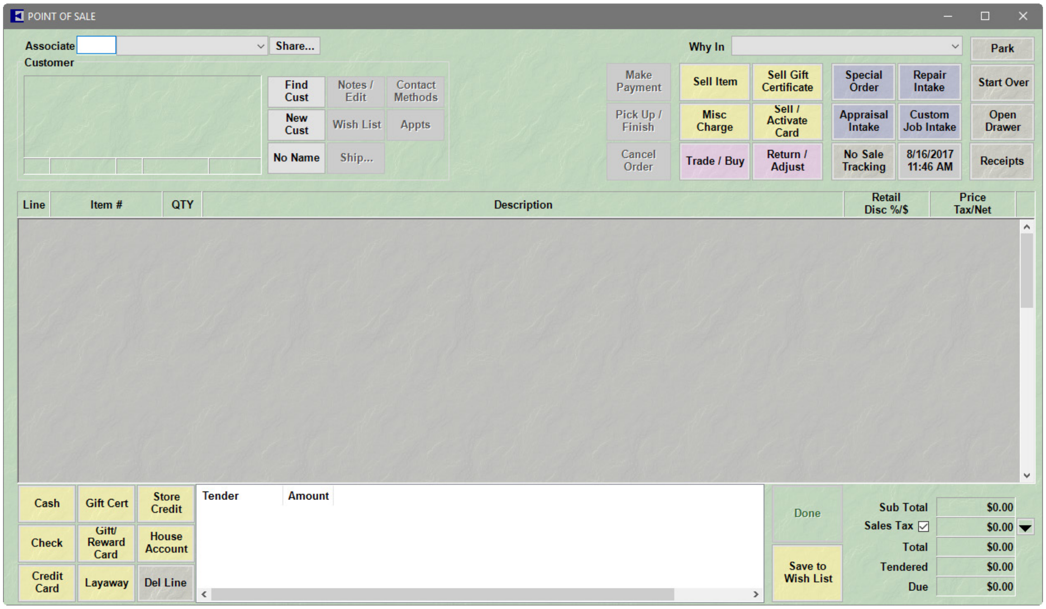
This function may be the primary function used for most associates and may be open on most workstations most of the time. Many customer and inventory tasks can be reached from here as needed to conduct a transaction.

For a basic video tutorial of working with the Point of Sale function in The Edge, go to https://www.screencast.com/t/xAsaOjDydj.

5.1 Starting a New Point-of-Sale Transaction

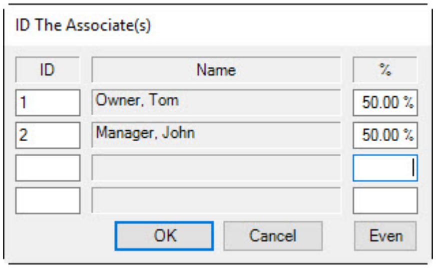
To start a new point-of-sale transaction:

1. Select the **POS** tab from the **Main Navigation Bar**. The **Point of Sale** window will appear.



2. Enter the **Associate** number or use the **Associate** drop-down list to select the user by name. Note that there is an option labeled **Share** that allows you to credit more than one associate on a given transaction.

   a. To enter multiple associates, select **Share**. The **ID The Associate(s)** window will appear.



ID The Associate(s)

ID	Name	%
1	Owner, Tom	50.00 %
2	Manager, John	50.00 %

b. Enter the ID of each associate along with the percent of the sale to be credited. The **Even** button automatically assigns an even split among the listed individuals.
c. Select **OK**.

For reporting purposes, the associate listed first in the ID the Associate window will be considered primary. On layaway, repair, and special order transactions, commission is credited to the associate who originally processed the intake regardless of who processes subsequent payments and pickups.

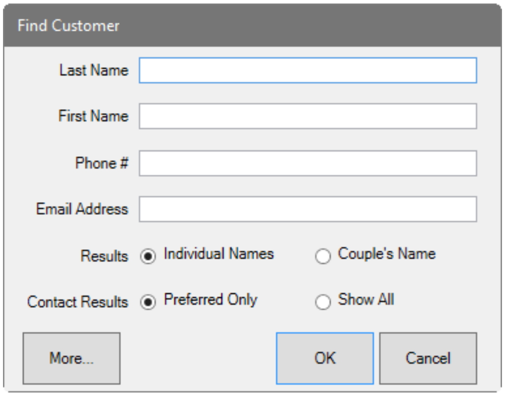
3. The **Why In** field offers an opportunity to track sources of store traffic. This information is key to marketing strategy. Select from the **Why In** drop-down list options, which is populated with a list of promotions, or enter a new response. **System Options** may be set to require a reply before the transaction can take place or allow text entry.

If this is the customer's first interaction with the store, the results will be saved in the Acquisition field of the customer record, which can later be reported out as a history of first-time transactions.

4. Use **Find Cust** or **New Cust** to associate a customer with the transaction. See the section entitled Finding a Customer at Point of Sale or the section entitled Adding a Customer at Point-of-Sale.
5. Proceed to the section entitled Sell Item at Point-of-Sale to continue the transaction.

5.1.1 Finding a Customer at Point of Sale

The abbreviated **Find Customer** window uses the same filtering logic as the full **Find Customers** filter, which are described in the section entitled Querying Data, except there are fewer fields with which to work. The **Find Customer** from point of sale will use your presets from the larger **Find Customer**.



Results ● Individual Names ○ Couple's Name

Contact Results ● Preferred Only ○ Show All

- **Results** lets you tell The Edge to look for only individual names or couples' names. The type of result record, individual or couple, will dictate to whom the transaction is assigned. If you select `Couple's Names`, the transaction will be assigned to the couple using the primary ID. If you want a specific individual, use **Individual Names**. The default selection is selected in **System Options**.
- **Contact Results** indicates whether to show only preferred contact methods or all.

Remember that from POS, you can use the Notes/Edit button to see the customer record. You can use the Switch to Spouse feature from there as well.

From the abbreviated **Find Customer** window, if you wish to access the full **Find Customer**s filter, select **More**. Also, there is a system option to set the default customer find at POS to be the full customer find filter.

When using this filter, The Edge will strip extra characters from the phone number. This means that dashes or periods typed differently here will not result in a mis-match.

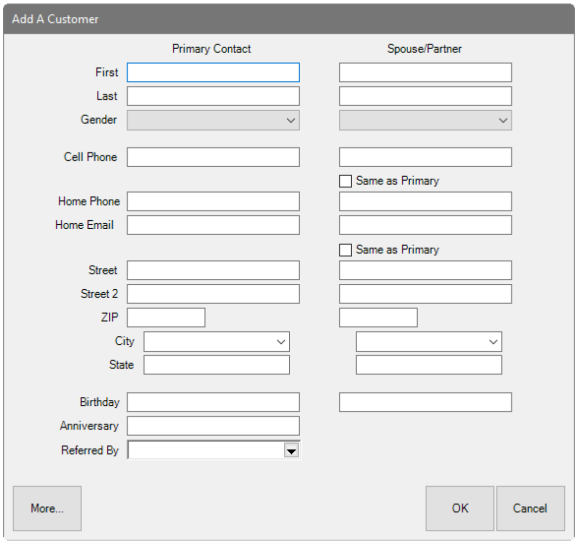
5.1.2 Adding a Customer at Point-of-Sale

Recording transactions conducted by a customer is important to maintaining customer relations and tracking customer activity. You can add customers using the **Add a Customer** function described in the section entitled Adding a Customer. If you do, customer information can be found using the Customer Find filter.

To complete the **Customer** information section during a point-of-sale transaction, ask the customer his or her name and perhaps whether this is their first visit to the store. If you know the customer is new or if you can't find a record using the **Customer Find** filter, you can create the customer record at point of sale as follows:

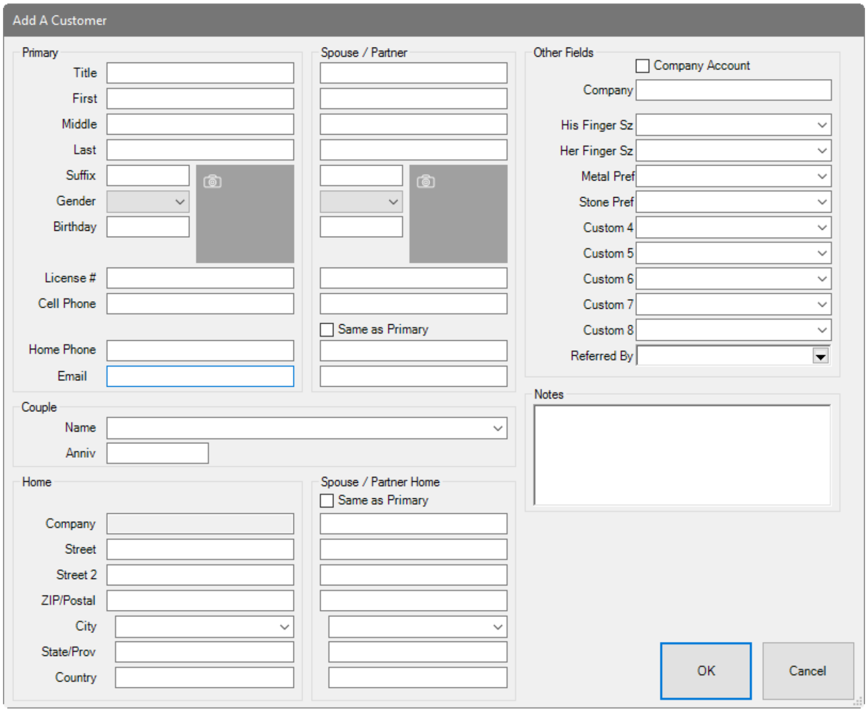
1. Selecting **Add** from the search results window or **New Cust** from the **Point of Sale** window. The **Add a Customer** window will appear. The window may appear in three different ways, depending on your **System Options**: `Fast`, `Fast Plus`, and `Full`.

   The `Fast` customer add option is abbreviated:



   In this window, the **More** button will return the full **Customer Add** window. These fields are similar to those in **Add A Customer**, but streamlined into one window.

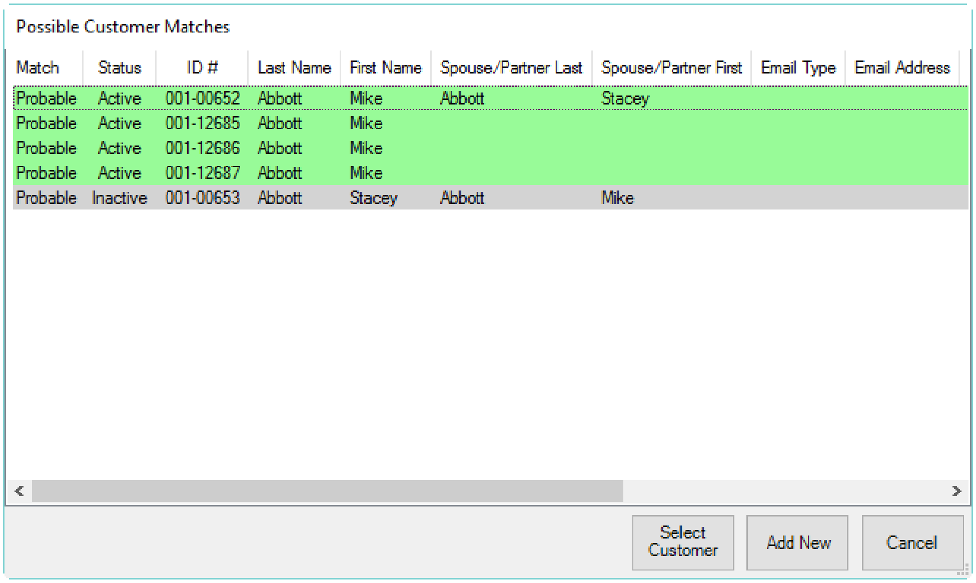
   The `Full` customer add option window contains many more of the fields used at **Customer ► Add**.



2. Populate the fields in each tab as described in the section entitled Working with Customer Record. Required fields are determined by your **System Options**.
3. Select a save option.

If there is record in The Edge that is similar:

1. The **Possible Customer Matches** screen will appear with a listing of possible and probable matching records.

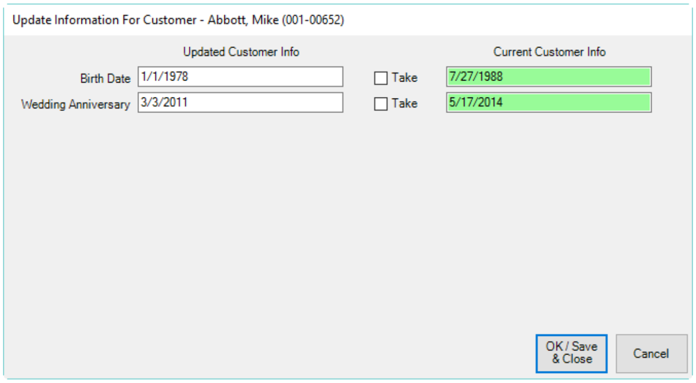


Possible Customer Matches

Match	Status	ID #	Last Name	First Name	Spouse/Partner Last	Spouse/Partner First	Email Type	Email Address
Probable	Active	001-00652	Abbott	Mike	Abbott	Stacey		
Probable	Active	001-12685	Abbott	Mike				
Probable	Active	001-12686	Abbott	Mike				
Probable	Active	001-12687	Abbott	Mike				
Probable	Inactive	001-00653	Abbott	Stacey	Abbott	Mike		

2. From here, choose from one of two options: select a customer from the list or add a new customer record based on the data entered to date.

    a. If the desired customer appears in the list, select the record and **Select Customer**. You will be prompted to confirm your selection, and any information you added to that point will be incorporated with the existing record.
    b. If there is a conflict, you will be prompted to choose the correct data. Checking **Take** will incorporate the information highlighted in green into the existing record.



Update Information For Customer - Abbott, Mike (001-00652)

	Updated Customer Info		Current Customer Info
Birth Date	1/1/1978	☐ Take	7/27/1988
Wedding Anniversary	3/3/2011	☐ Take	5/17/2014

    c. Select **OK/Save and Close**; the record will be saved.

Notice that inactive customer records are highlighted in gray. If you select one of those, you will be prompted to make the record active.

3. If the desired customer is not one of the possible matches, select **Add New** and complete the entry.

The duplicate customer feature will help you avoid creating duplicate customer records, you might also search for the customer before adding him. If no match is found, use the Add button from the resulting customer list window. This will auto-fill your search criteria into the appropriate fields. For example, if you searched for customer Woodrow Wilson and found nothing, press the Add button would automatically fill in the first name field with Woodrow and the last name field with Wilson.

5.1.3 Scanning an ID at Point-of-Sale

To scan customer data directly from a driver's license or business card, use the ScanShell OCR ID scanner. For information about connecting the ScanShell ID to The Edge, see the tip sheet found at http://docs.edgeuser.com/TIP-2014-046_ScanShell_ID_Scanner.pdf.

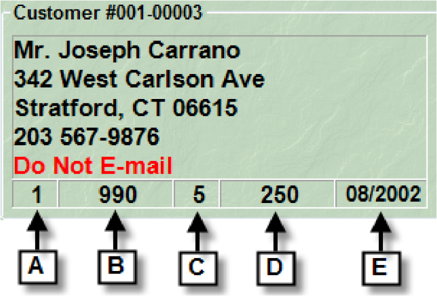
To scan the data:

1. The ScanShell OCR software must be running in the background. Start it by double clicking the icon that was placed on the desktop during ScanShell software installation.
2. From the ScanShell application, select the source from the **Category** drop-down menu. It will default to driver's license/business card.
3. Go to **Point of Sale,** click **New Cust**. The **Add a Customer** window will appear.
4. Scan the license. The data will be populated in the **Add a Customer** window and saved to the data file.
5. Scan a business card if available. The additional data will be populated into the **Add a Customer** window.
6. Check the data and make changes if necessary.
7. Select **OK**.
8. Continue with the point-of-sale transaction as usual.

- **If you scan the back of the driver's license where there is a barcode using the ScanShell scanner (not your barcode scanner), you will get a more accurate scan, but not the photo. This is especially helpful if the driver's license is worn and unclear. To do so, select 2D Barcode from the Category drop-down menu.**
- **The ID Scanner process only works in the POS New Customer window. It does not work for adding a new customer through the Customer function.**

5.1.4 Other Customer Options at Point of Sale

Custom data appears at point of sale as follows.



Customer #001-00003

Mr. Joseph Carrano
342 West Carlson Ave
Stratford, CT 06615
203 567-9876
Do Not E-mail

1	990	5	250	08/2002

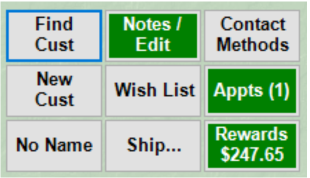
The following details are shown for returning customers:

A	Total number of items ever purchased from your store.
B	Total price of all items purchased from your store.
C	The number of transaction with your store.
D	Total amount tendered with your store.
E	The date this customer was entered into The Edge.

Customer data shown here is blended and includes the totals for both parties in the couple.

Double clicking the customer name from the Point of Sale window will return the full customer record for editing.

If an area has activity on record for the customer, the button will be green. Buttons may vary based on customer activity. For example, the **Rewards** button becomes green when there is a rewards balance and even lists the amount of balance.



No Name

For a customer who does not wish to be saved in the database, from the **Point of Sale** screen, select **No Name**. **Cash Customer** will appear in the **Customer** field. Avoid using this on transactions such as repairs, layaways, and special orders that have multiple steps, e.g., intake, payment, pickup.

Notes/Edit

Use the **Notes/Edit** option to add customer notes or edit information as described in the section entitled Working with Customer Records. If you select a different contact method, that is the information that will appear in the point of sale window.

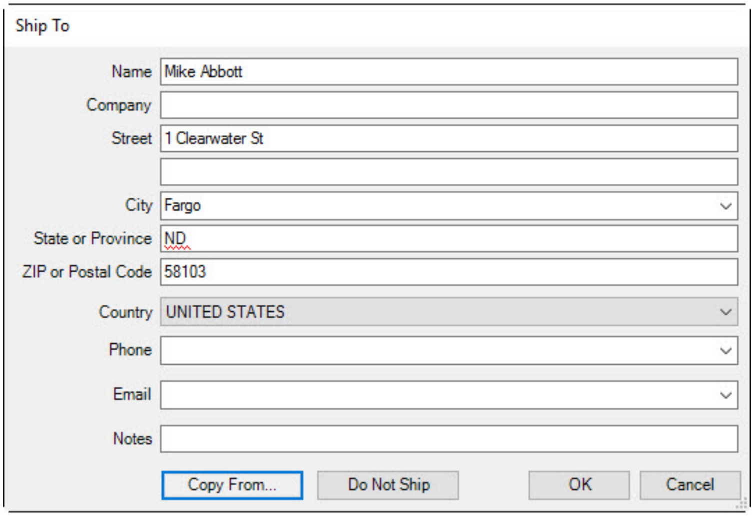
Wish List

If **Wish List** is active, select it to see items that the customer has expressed an interest in in the past.

Ship…

If an item is to be shipped:

1. Select **Ship…** to enter shipping information. The **Ship To** window will appear.



Ship To

Name: Mike Abbott

Company:

Street: 1 Clearwater St

City: Fargo

State or Province: ND

ZIP or Postal Code: 58103

Country: UNITED STATES

Phone:

Email:

Notes:

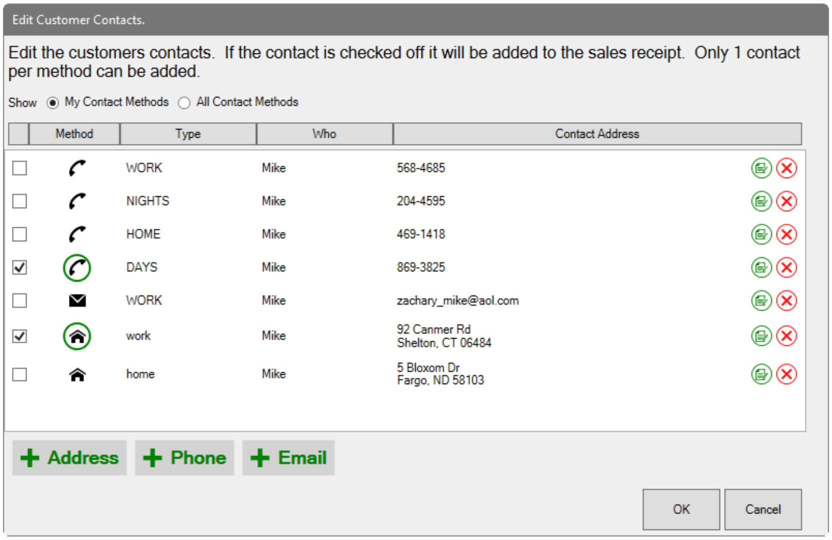
   a. Enter shipping destination information.
   b. To copy an address from a customer record, use **Copy From…**.
   c. To cancel the changes you've made, select **Cancel**.
   d. Select **OK**.

2. Select a save option.

The Edge uses this information to apply sales tax as required for the destination as opposed to a walk-in customer. Please consult local tax laws regarding taxation of out-of-state sales.

Contact Methods

Use the Contact Methods option to quickly update a customer's contact information as described in the section entitled Customer General Tab.



Edit Customer Contacts.

Edit the customers contacts. If the contact is checked off it will be added to the sales receipt. Only 1 contact per method can be added.

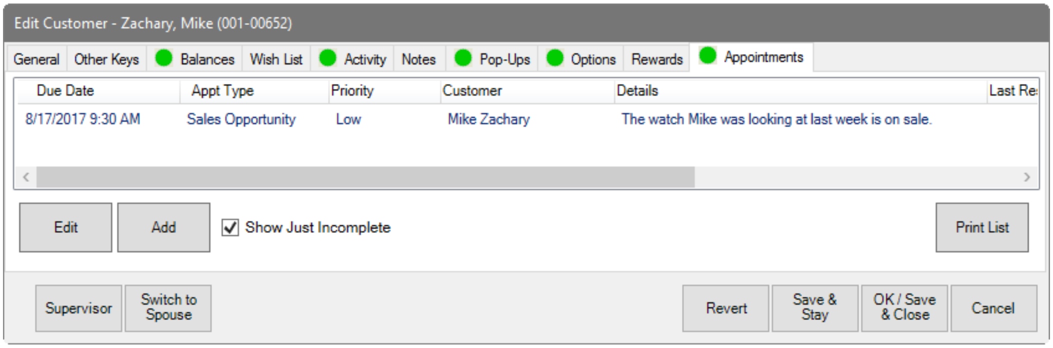
Show ● My Contact Methods ○ All Contact Methods

	Method	Type	Who	Contact Address
☐	☎	WORK	Mike	568-4685
☐	☎	NIGHTS	Mike	204-4595
☐	☎	HOME	Mike	469-1418
☑	☎	DAYS	Mike	869-3825
☐	✉	WORK	Mike	zachary_mike@aol.com
☑	⌂	work	Mike	92 Canmer Rd Shelton, CT 06484
☐	⌂	home	Mike	5 Bloxom Dr Fargo, ND 58103

- **Contact methods circled in green are the preferred contact number for each contact method.**
- **Check the contact method(s) to show on the receipt. When you choose a different contact method other than the default, that is the contact method that will appear in the transaction record.**

Appts

Use the **Appts** option to add appointments or work with scheduled appointments. The **Customer Edit** window will appear with the **Appointments** tab open. In this example, because the customer is there in your store, you can use the opportunity to address the appointment right there. Further, you can go to any tab in the customer record.

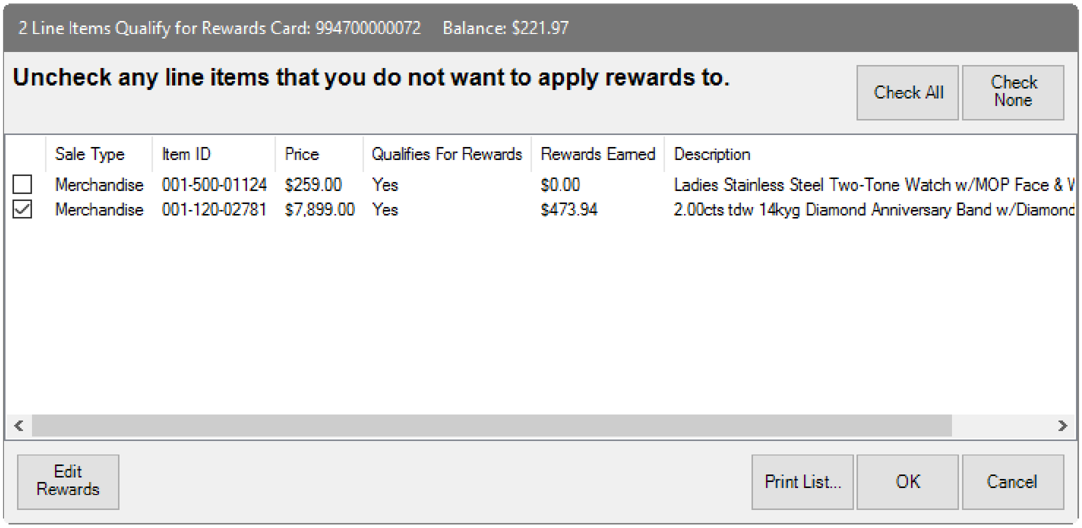


Due Date	Appt Type	Priority	Customer	Details	Last Re
8/17/2017 9:30 AM	Sales Opportunity	Low	Mike Zachary	The watch Mike was looking at last week is on sale.	

☑ Show Just Incomplete

Rewards

After you have entered sale items and services for the transaction, you can use the **Rewards** option to indicate that some items should not have rewards. See the section entitled Rewards Tab.



2 Line Items Qualify for Rewards Card: 994700000072 Balance: $221.97

Uncheck any line items that you do not want to apply rewards to.

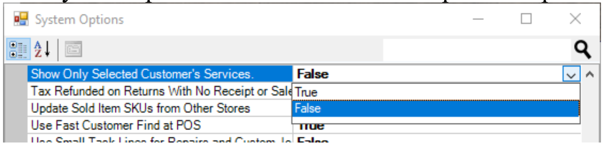
	Sale Type	Item ID	Price	Qualifies For Rewards	Rewards Earned	Description
☐	Merchandise	001-500-01124	$259.00	Yes	$0.00	Ladies Stainless Steel Two-Tone Watch w/MOP Face & V
☑	Merchandise	001-120-02781	$7,899.00	Yes	$473.94	2.00cts tdw 14kyg Diamond Anniversary Band w/Diamond

Leaving an item checked means you want rewards applied. Check All means all of these items should have rewards. Check None means none of the items should have rewards applied.

5.1.5 Linked Customer Accounts

If you have a customer record with a linked Spouse/Partner there is a system option that controls how layaways, special orders, repairs, memos, and custom jobs will show at POS and how they will appear in the Payment / Pick Up screens.

The system option is found under POS Options & provides two choices:

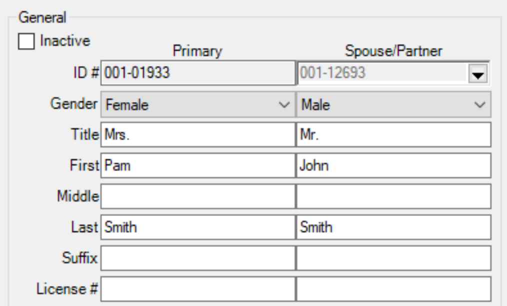


Show Only Selected Customer's Services.	False
Tax Refunded on Returns With No Receipt or Sal	True
Update Sold Item SKUs from Other Stores	False
Use Fast Customer Find at POS	True

True	Only display this customer's available services for payment and/or pick up.
False	Display customer & spouse/partner's available services for payment and/or pick up.

Example 1

Customer Pam Smith and spouse John Smith have a linked account.

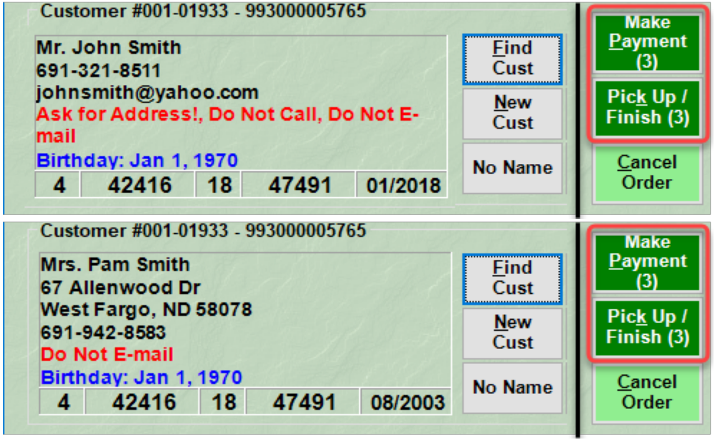


☐ Inactive

	Primary	Spouse/Partner
ID #	001-01933	001-12693
Gender	Female	Male
Title	Mrs.	Mr.
First	Pam	John
Middle		
Last	Smith	Smith
Suffix		
License #		

John has a layaway in his name only (1 service).
Pam has a repair & special order in her name only (2 services).

With this option set to **False**, all transactions show at POS regardless of customer selected.



Customer #001-01933 - 993000005765

Mr. John Smith
691-321-8511
johnsmith@yahoo.com
Ask for Address!, Do Not Call, Do Not E-mail
Birthday: Jan 1, 1970

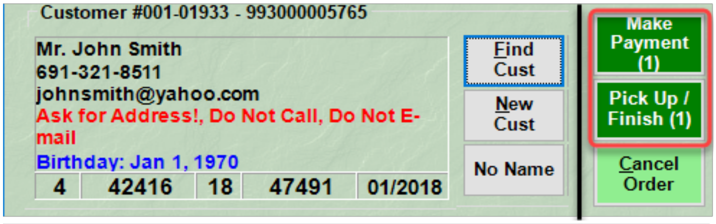
4	42416	18	47491	01/2018

Customer #001-01933 - 993000005765

Mrs. Pam Smith
67 Allenwood Dr
West Fargo, ND 58078
691-942-8583
Do Not E-mail
Birthday: Jan 1, 1970

4	42416	18	47491	08/2003

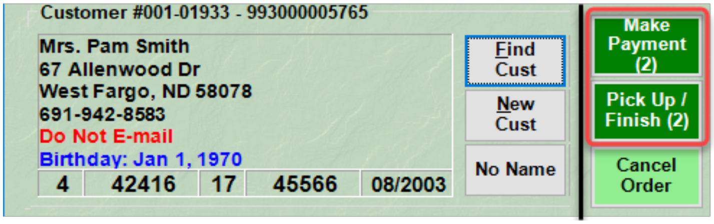
With this option set to **True**, only transactions for the selected customer show.



Customer #001-01933 - 993000005765

Mr. John Smith
691-321-8511
johnsmith@yahoo.com
Ask for Address!, Do Not Call, Do Not E-mail
Birthday: Jan 1, 1970

4	42416	18	47491	01/2018



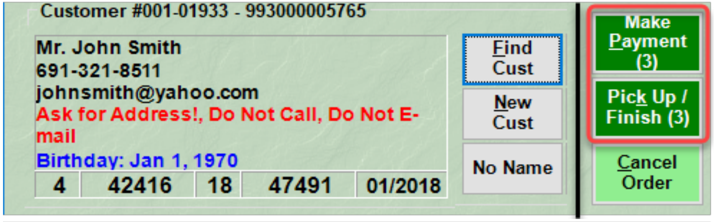
Customer #001-01933 - 993000005765

Mrs. Pam Smith
67 Allenwood Dr
West Fargo, ND 58078
691-942-8583
Do Not E-mail
Birthday: Jan 1, 1970

4	42416	17	45566	08/2003

Example 2
John picks up his layaway and no longer has any services in his name (0 services).
Pam still has a repair and special order in her name (2 services).

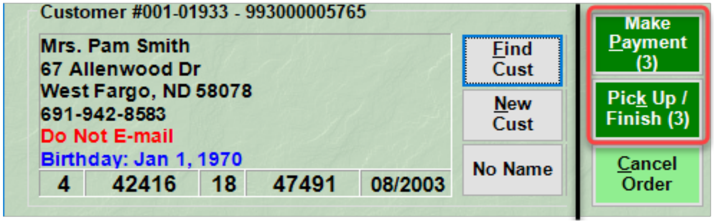
With this option set to **False**, all transactions show regardless of customer selected.



Customer #001-01933 - 993000005765

Mr. John Smith
691-321-8511
johnsmith@yahoo.com
Ask for Address!, Do Not Call, Do Not E-mail
Birthday: Jan 1, 1970

4	42416	18	47491	01/2018

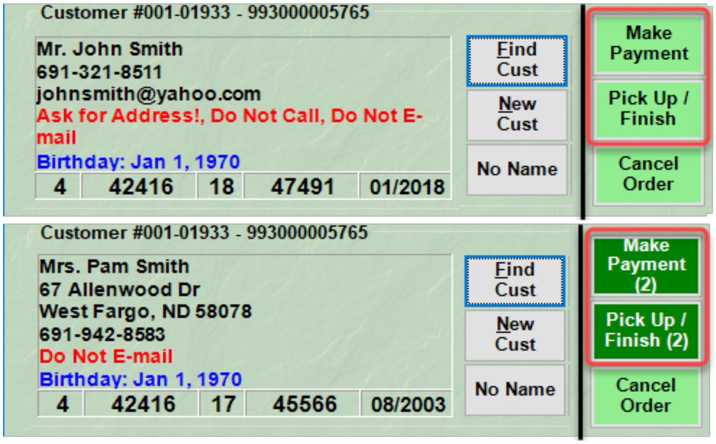


Customer #001-01933 - 993000005765

Mrs. Pam Smith
67 Allenwood Dr
West Fargo, ND 58078
691-942-8583
Do Not E-mail
Birthday: Jan 1, 1970

4	42416	18	47491	08/2003

With this option set to **True**, only transactions for the selected customer show. However in this case John doesn't have any transactions, but there are transactions available under his spouse. To make the associate discreetly aware the buttons are highlighted in a light green and do not display the number of available transactions.



Customer #001-01933 - 993000005765

Mr. John Smith
691-321-8511
johnsmith@yahoo.com
Ask for Address!, Do Not Call, Do Not E-mail
Birthday: Jan 1, 1970

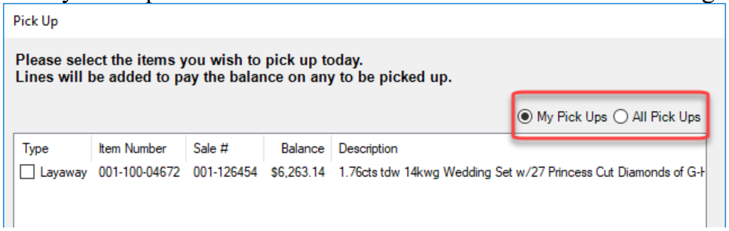
4	42416	18	47491	01/2018

Customer #001-01933 - 993000005765

Mrs. Pam Smith
67 Allenwood Dr
West Fargo, ND 58078
691-942-8583
Do Not E-mail
Birthday: Jan 1, 1970

4	42416	17	45566	08/2003

When you do a payment or pick up there is a radio button in the upper right that controls what is shown. The system option controls how this defaults but can still be changed at POS.



Pick Up

Please select the items you wish to pick up today.
Lines will be added to pay the balance on any to be picked up.

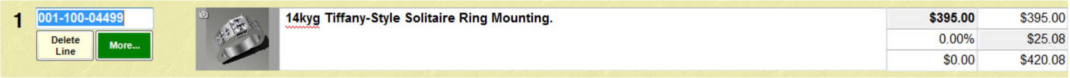
● My Pick Ups ○ All Pick Ups

Type	Item Number	Sale #	Balance	Description
☐ Layaway	001-100-04672	001-126454	$6,263.14	1.76cts tdw 14kwg Wedding Set w/27 Princess Cut Diamonds of G-H

5.2 Sell Item at Point-of-Sale

To sell an item:

1. Scan the barcode on the item tag. Fields will appear containing a stock number, description, retail discount as either a percentage or a dollar amount, and the price, with and without tax.



1 001-100-04499

14kyg Tiffany-Style Solitaire Ring Mounting.

$395.00	$395.00
0.00%	$25.08
$0.00	$420.08

With IUOM and PRE stock, it is important to treat sales to account for both the amount (ct, grams, etc.) and the quantity (1 diamond, 1 piece, etc.) This means that when working at POS, create a sale line for each piece and enter the unit of measure in each. For example, if you sell three watchbands at $10 each, enter a line item for each one. If you create only one line item for $30, this would not properly reduce the physical quantity available in stock and your resulting inventory would be off.

- **If a customer has more than one item, continue scanning as many times as needed to add lines. Delete Line will remove any lines not needed.**
- **If you scan an item that is supposed to be located at another store, The Edge will require an override to sell it from the scanning store.**

2. If you are not using the barcode scanner, select **Sell Item** from the **Point of Sale** window. A new line item will appear.
3. Enter the item ID into the **Stock Number** field, or select **Find/New** for the **Item Find** feature.
4. The item information will appear on the **Point of Sale** window. The **More** button contains further options for working with the item. For more information, see the section entitled More Button.
5. The Edge allows you to adjust the sale price in different ways by entering the appropriate amount into one of the fields provided for that purpose.

Retail	Retail price as defined by the system. This cannot be changed at point of sale.
Disc %	Percentage by which to discount the item. This can be changed or be built into item record (e.g., item on sale).
$	Dollar amount to discount the item. This can be changed or be built into item record.
Price	Price as figured by retail and discount fields or may be entered.
Tax	Tax as figured by system settings; this cannot be changed.
Net	Price plus tax. If you enter a net here, The Edge will calculate **Price** and **Tax** for you. If you enter a price here, it will constitute an out-the-door price.

Values in any of these fields will adjust the others as needed.

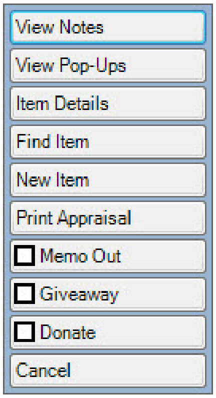
- **For any prices or discounts that result in a price lower than the minimum markup, as defined in the category and or vendor record for the item, a supervisor must approve the transaction.**
- **Tax-exempt sales are accommodated by pressing Alt X or clicking on the tax box at the bottom right of the window.**

5.2.1 Delete Line

Notice that after the item is entered, in the item line is an option to delete the sale line. If you use the **Delete Line** option, you will lose the sale line without any confirmation.

5.2.2 More Button

In the item sale line, there is a button labeled **More**. The **More** button contains options for working with the item directly from point of sale. If there are notes associated with the item, the **More** button will be green. If there is a pop-up note, the **More** button will blink.



Depending on the situation and the item, options in the **More** button include:

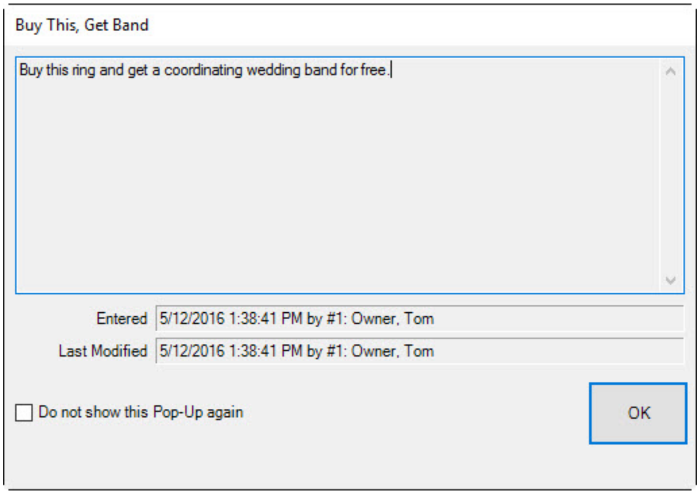
View Notes	View notes in the item record.
View Pop-Ups	View pop-ups from the item record.
Item Details	Opens the full record for the item.
Find Item	Opens the **Find Item** filter to locate a different item or the item record.
New Item	Allows you to add inventory at point of sale. Permission may be required.
Print Appraisal	Generates an appraisal of the item. This field appears only if an appraisal is available for the item.
Memo Out	Changes the item status to indicate that the customer has taken possession of the item before deciding to purchase it. Once this is done, it works much like a layaway. You can take a deposit, take payments, etc. The difference is that with memo out, the item leaves the store.

Collection	Brings up other items that are part of that collection. See the section entitled Collections for more information.
Giveaway	Marks the item as a promotional giveaway. See the section entitled Promotional Giveaways for more information.
Donate	Marks the item as a donation. See the section entitled Donating an Item for more information.
Cancel	Closes the **More** sub-menu.

5.2.3 Working with Item Pop-Ups at Point of Sale

If an item has a pop-up associated with it, when you scan or enter it at point of sale, a pop-up window will appear. To work with such pop-ups:

1. Scan or enter the item. The appropriate pop-up window appears.



Buy This, Get Band

Buy this ring and get a coordinating wedding band for free.

Entered: 5/12/2016 1:38:41 PM by #1: Owner, Tom

Last Modified: 5/12/2016 1:38:41 PM by #1: Owner, Tom

☐ Do not show this Pop-Up again

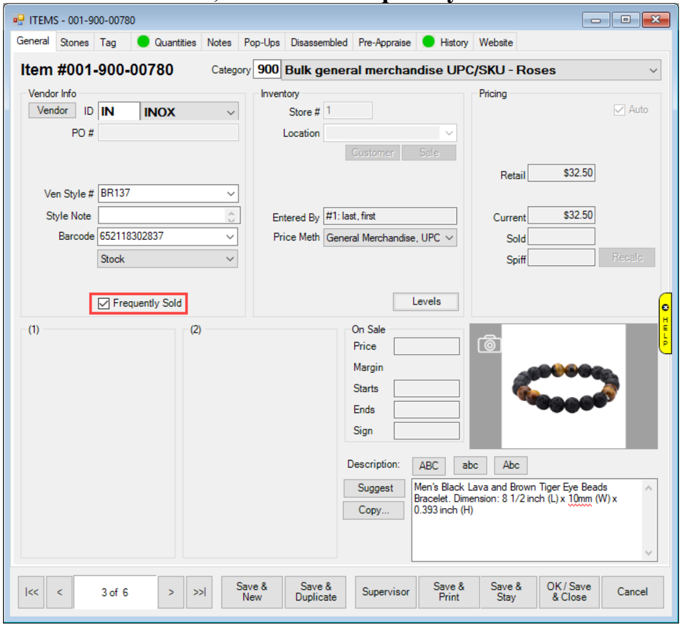
2. Work with the customer or item as directed in the window.
3. If the pop-up is no longer needed, for example if it's for a specific reminder, check the **Do no show this Pop-Up again** option.
4. To dismiss the pop-up for this instance, select **OK**.
5. If the information within the pop-up is needed again while making the sale, use the **More** button menu and select **View Pop-Ups**.

5.2.4 Frequently Sold Items

Popular items that are frequently sold can be flagged so that they are easily accessible from Point of Sale.

To mark an item as frequently sold:

1. Use **Item Find** to search for and edit the item record.
2. On the **General** tab, check the **Frequently Sold** checkbox.



Item #001-900-00780

Category 900 Bulk general merchandise UPC/SKU - Roses

ID IN INOX

Store # 1

Ven Style # BR137

Barcode 652118302837

Stock

☑ Frequently Sold

Entered By #1: last, first

Price Meth General Merchandise, UPC

Retail $32.50

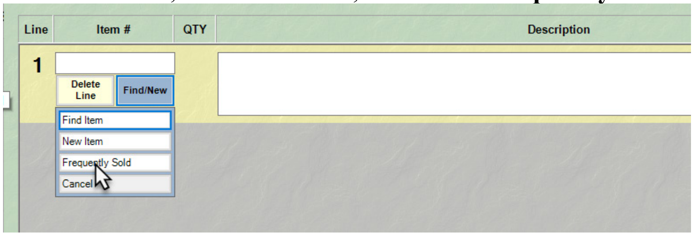
Current $32.50

Men's Black Lava and Brown Tiger Eye Beads Bracelet. Dimension: 8 1/2 inch (L) x 10mm (W) x 0.393 inch (H)

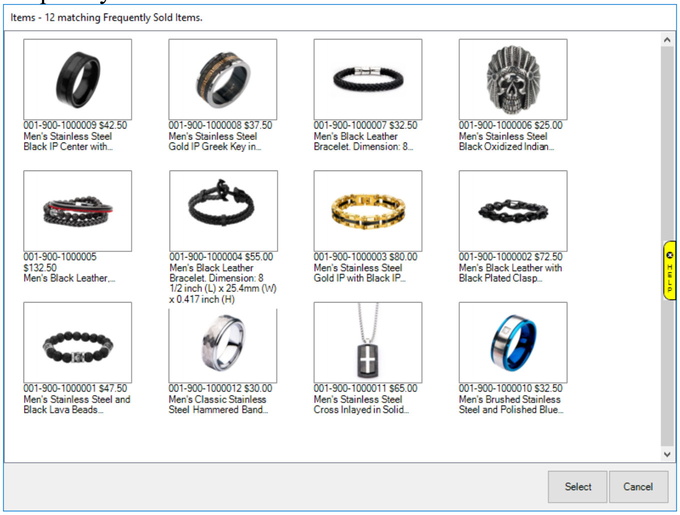
3. These items are tracked by vendor and vendor style. When you mark an item as frequently sold, all other items of matching vendor and style will also have their **Frequently Sold** checkbox updated.
4. Save your changes.

To use a frequently sold item at POS:

1. From the **POS** screen, click **Sell Item**. This will add a new blank sale line.
2. On the sale line, click **Find/New**, then select **Frequently Sold** from the menu.



3. The **Frequently Sold Items** window will appear showing all items that have been marked frequently sold.



4. Choose the item you wish to sell and click **Select** to add it to the sale.
5. Finish the sale normally.

- **If there are multiple fine jewelry items of the same vendor and style marked frequently sold, the oldest one will always be selected for sale first.**
- **To see which items you currently have marked frequently sold, use the Point of Sale Frequently Sold Items checkbox on the Item Details tab of Item Find.**

To remove an item from the frequently sold list:

1. Use **Item Find** to search for the item record. If there are multiple items for the same vendor and style, you can choose any individual item.
2. Uncheck the Frequently Sold checkbox.
3. Save your changes.
4. For individual items, all items matching this vendor and style will automatically have their records updated to remove them upon save.

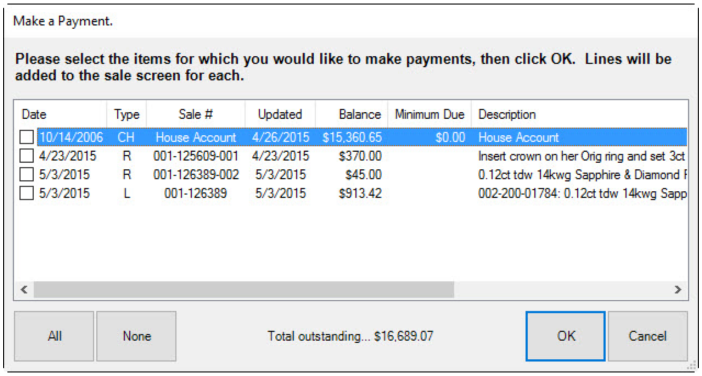
5.3 Other Point-of-Sale Transaction Options

This section details the use of the **Transaction Options** area in the **Point of Sale** window.

5.3.1 Make Payment

Payments on account could be for special orders, appraisals, repairs, custom jobs, layaways, or store charges. At any time after the balance is created, payments can be taken on account. To do so:

1. From **Point of Sale** window, identify the customer, and select **Make Payment**. A list of open orders (special orders, appraisals, repairs, custom jobs, layaways, and store charges) will appear.



Please select the items for which you would like to make payments, then click OK. Lines will be added to the sale screen for each.

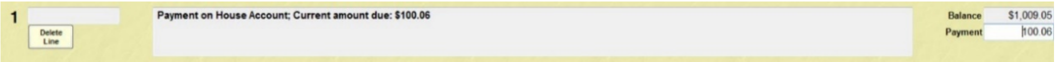
	Date	Type	Sale #	Updated	Balance	Minimum Due	Description
☐	10/14/2006	CH	House Account	4/26/2015	$15,360.65	$0.00	House Account
☐	4/23/2015	R	001-125609-001	4/23/2015	$370.00		Insert crown on her Orig ring and set 3ct
☐	5/3/2015	R	001-126389-002	5/3/2015	$45.00		0.12ct tdw 14kwg Sapphire & Diamond F
☐	5/3/2015	L	001-126389	5/3/2015	$913.42		002-200-01784: 0.12ct tdw 14kwg Sapp

Total outstanding... $16,689.07

Note that in the **Make a Payment** window, multiple layaway items on one layaway sale will appear as one item. Fields and options in the **Make a Payment** window include:

Date	The date the charge was incurred.
Type	The type of balance.
Sale #	The transaction ID that included the charge.
Updated	The date of the last transaction against the balance.
Balance	The balance due.
Minimum Due	For house accounts, the minimum payment due for the current statement period including all past due balances.
Description	A description of the transaction.

2. Select the items for which payments are to be applied.
3. Select **OK**. A sale line item will be added to the **Point of Sale** window for each payment to be made.



Payment on House Account; Current amount due: $100.06

Balance $1,009.05
Payment 100.06

- **After taking the payment, a tender method is still required as described in the section entitled Tender Options.**
- **Taking payments on special services is entirely optional. Customers will often pay in full when items are picked up.**

4. The **Description** field will show current amount due and any late payments due for house accounts. The **Balance** field will be populated with the total statement amount due. The **Payment** field can be modified. The receipt will also contain this information.
5. Choose the form of payment being made as described in the section entitled Tender Options.

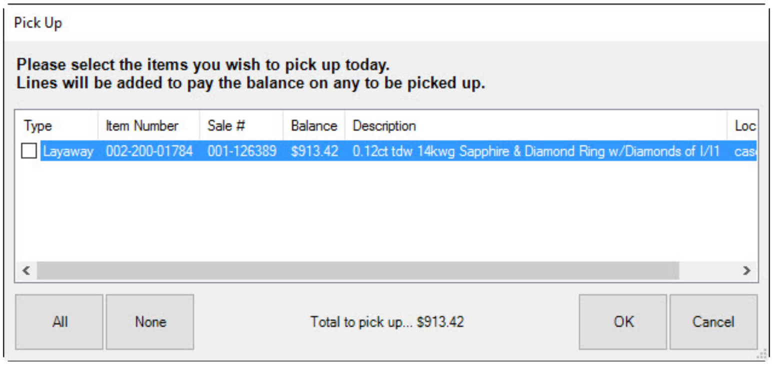
5.3.1.1 Payments Using Rewards Cards

While payment by rewards card can be taken for pickup, The Edge does not allow rewards cards to be used for deposits and interim payments. However, if deposits or interim payments were made in cash, The Edge does allow for final payment by rewards card and refund of the cash.

5.3.2 Pick Up/Finish Special Orders, Layaways, etc.

If a customer has a special order, layaway, repair, custom job, or appraisal that is ready to be picked up, the **Pick Up** button will be active. Layaways can be picked up at any time. Special orders are not deemed ready for pickup until the item has arrived in the store and allocated to the special order record. Repairs are not deemed ready for pickup until they are marked as done. To complete that sale or transaction:

1. Find the customer for whom the items are being held.
2. Select **Pick Up** from the **Point of Sale** menu. Alternatively, if the customer presents a receipt for the item to be picked up, scan the barcode on the receipt. In either case, the **Pick Up** window will appear.



Please select the items you wish to pick up today.
Lines will be added to pay the balance on any to be picked up.

Type	Item Number	Sale #	Balance	Description	Loc
☐ Layaway	002-200-01784	001-126389	$913.42	0.12ct tdw 14kwg Sapphire & Diamond Ring w/Diamonds of I/I1	cas

Total to pick up... $913.42

If you selected **Pick-Up**, each layaway item for the customer is shown separately; you must select the desired item. If you scanned the item off a receipt, the system knows which item you wish to work with and presents only that item. For repairs, a location will also be shown.

Until they are picked up, repair/layaway/special order transactions are not counted as sales.

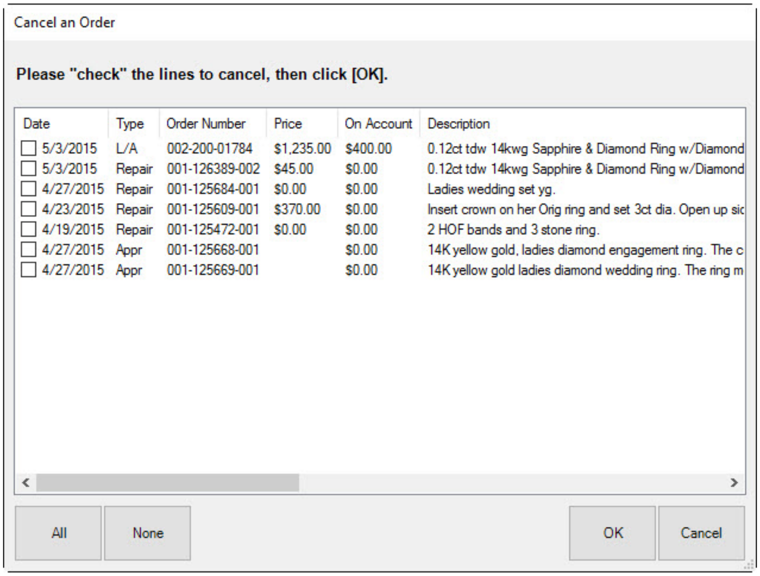
- **For the customer's references, the receipt includes a total due at pick-up entry.**
- **If there are multiple items in a job, items can be picked up separately by selecting from the pick-up window only the items desired.**
- **Often, conditions must be met before a particular transaction is available for pickup. Repairs, for instance, should be marked done to be made available for pickup.**

3. A list of items ready to be picked up will appear. Select the item(s) to be picked up as part of this sale, and then select **OK**.
4. A sale line item will be added for each item to be picked up, with each price set to the remaining balance. The prices can be adjusted or discounted in the same way as a regular sale line.
5. When the sale is complete, the order records will be updated to reflect that the customer has picked up the items. If the order was for multiples of the same item, but only some of the items were picked up, the system will track that information.

5.3.3 Canceling an Order at Point-of-Sale

To cancel an order that has previously been placed:

1. Find the customer for whom the order is to be canceled.
2. Select **Cancel Order** from the **Point of Sale** window. The **Cancel an Order** window will appear.

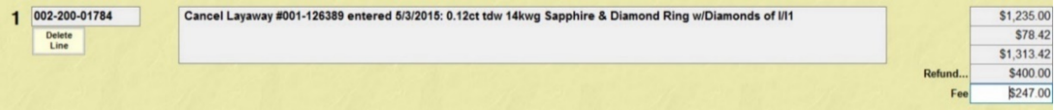


Please "check" the lines to cancel, then click [OK].

	Date	Type	Order Number	Price	On Account	Description
☐	5/3/2015	L/A	002-200-01784	$1,235.00	$400.00	0.12ct tdw 14kwg Sapphire & Diamond Ring w/Diamond
☐	5/3/2015	Repair	001-126389-002	$45.00	$0.00	0.12ct tdw 14kwg Sapphire & Diamond Ring w/Diamond
☐	4/27/2015	Repair	001-125684-001	$0.00	$0.00	Ladies wedding set yg.
☐	4/23/2015	Repair	001-125609-001	$370.00	$0.00	Insert crown on her Orig ring and set 3ct dia. Open up sic
☐	4/19/2015	Repair	001-125472-001	$0.00	$0.00	2 HOF bands and 3 stone ring.
☐	4/27/2015	Appr	001-125668-001		$0.00	14K yellow gold, ladies diamond engagement ring. The c
☐	4/27/2015	Appr	001-125669-001		$0.00	14K yellow gold ladies diamond wedding ring. The ring m

Note that in the **Cancel an Order** window, layaway items are listed separately.

3. Select the item that the customer wants to cancel by checking the appropriate box.
4. Select **OK**. The item number and description number will appear on the **Point of Sale** window as an item with a note confirming cancellation of the item. The customer's deposit on the item appears as a credit to his or her account.



1 002-200-01784

Cancel Layaway #001-126389 entered 5/3/2015: 0.12ct tdw 14kwg Sapphire & Diamond Ring w/Diamonds of I/I1

$1,235.00
$78.42
$1,313.42
Refund... $400.00
Fee $247.00

5. Enter a fee if applicable.
6. Proceed with the customer's transactions.

5.3.4 Misc Charge

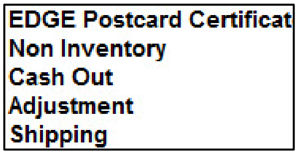
Misc Charge is used to offset coupons or to sell items not in inventory.

The use of Misc Charge for regular sales is discouraged. Because there are no offsetting costs or supporting inventory records on these sales, using this function may skew your profit reports.

To enter a miscellaneous charge:

1. Select **Misc Charge** from the **Point of Sale** menu. A line item will appear.

2. Click the drop-down list in the line item. A list of miscellaneous transactions will appear. This list varies with your system setup.



EDGE Postcard Certificat
Non Inventory
Cash Out
Adjustment
Shipping

3. Select the desired transaction type.
4. Edit the description of the miscellaneous charge if desired in the **Description** field.
5. Enter the dollar amount of the miscellaneous charge in the **Price** field.
6. Check whether the item is taxable.
7. Proceed with payment as detailed in the section entitled Tender Options.

5.3.5 Trade/Buy at Point-of-Sale

To enter a trade-in:

1. Select **Trade/Buy** from the **Point of Sale** window. A line item will appear with **Trade In** automatically appearing in the **Stock #** field.

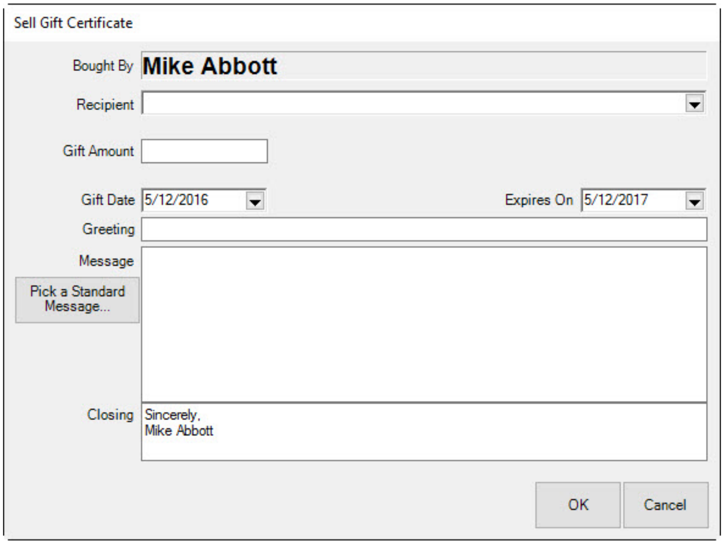
2. Enter a description of the piece in the **Description** field.
3. Enter the dollar amount of the trade-in in the **Price** field.
4. If permitted by tax law, you may wish to reduce the sales tax by the taxable amount of the trade-in. To do so, select the **Pre-Tax** option.
5. Proceed with payment as detailed in the section entitled Tender Options.

If a trade-in category was specified in System Options, then the trade-in item will be created in that category. Otherwise, no item is automatically created.

5.3.6 Sell Gift Certificate

To sell a gift certificate:

1. Select **Sell Gift Certificate** from the **Point of Sale** window. The **Sell Gift Certificate** window will appear.



Sell Gift Certificate

Bought By: Mike Abbott

Recipient:

Gift Amount:

Gift Date: 5/12/2016

Expires On: 5/12/2017

Greeting:

Message:

Closing: Sincerely,
Mike Abbott

2. Insert as much information as possible, including who bought the certificate, who will receive the certificate, the dollar amount, the time period the certificate is good for, and the message listed on the certificate. By selecting **Pick a Standard Message…**, prewritten messages may be edited, added, or selected for use.
3. Select **OK**. The gift certificate will appear as an item.
4. Print the receipt and the gift certificate will print as well.

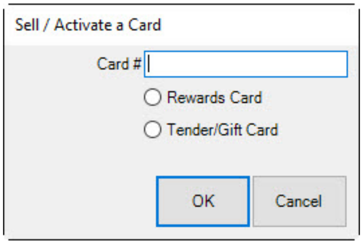
- **If a customer name has already been entered into the Point of Sale window, it will automatically come up in the Bought By field of the Gift Certificate window. In addition, a standard closing will automatically appear but can be changed as desired.**
- **The standard time period for a gift certificate is one year. When Sell Gift Certificate is selected, the current date will be automatically listed and the Expires On date will be set as one year later. The Gift Date and Expires On date can both be changed as desired. Your local government may have restrictions on expiration dates.**
- **Gift certificates cannot be issued to couples; the individual customer ID will be used.**

It is necessary to specify a recipient on a gift certificate. If none is known at the time, you should create a generic customer record to act as a placeholder. We often recommend using “Gift Certificate Recipient.” Once the customer comes in to redeem the certificate, you can overwrite the customer record with their correct information.

5.3.7 Sell Tender Card

To sell a tender card:

1. Scan the tender card. The tender card's ID number will appear as a line item on the **Point of Sale** window. If you must enter the tender card ID manually:
    a. Select **Sell/Activate Card** from the **Transaction Options** of the **Point of Sale** window. The **Sell/Activate a Card** window will appear.



    b. Enter the number of the card to be used.
    c. Select **OK** or press **Enter**.
    d. After the card number has been entered, the sale will appear as a line item on the **Point of Sale** window.
2. Enter the value of the card to be assigned.
3. Proceed with transactions.

Tender card numbering follows a formula that makes the numbers specific to your store. For this reason, you MUST contact The Edge Support Team before ordering these cards. Failure to do so may result in incompatible cards.

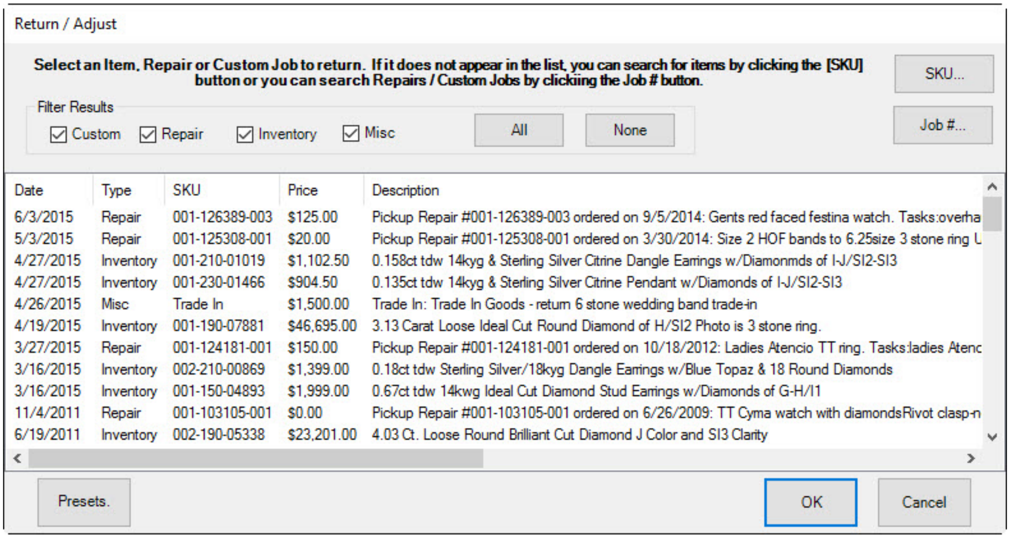
5.3.8 Taking Return

To take a return for an item with a receipt:

1. Scan the barcode on the receipt.
2. The line item will appear. The customer will be identified automatically.
3. Complete the transaction as usual.

To process a return for an item that has been previously purchased, but for which no receipt is available:

1. Find the customer record.
2. Select **Return/Adjust** from the **Transaction Options** section of the **Point of Sale** window. The **Return Item** window will appear.

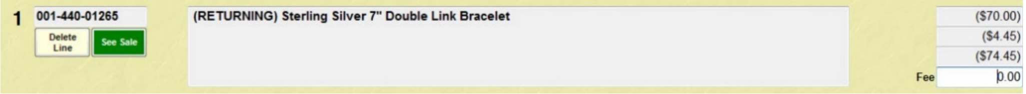


Select an Item, Repair or Custom Job to return. If it does not appear in the list, you can search for items by clicking the [SKU] button or you can search Repairs / Custom Jobs by clicking the Job # button.

Date	Type	SKU	Price	Description
6/3/2015	Repair	001-126389-003	$125.00	Pickup Repair #001-126389-003 ordered on 9/5/2014: Gents red faced festina watch. Tasks:overha
5/3/2015	Repair	001-125308-001	$20.00	Pickup Repair #001-125308-001 ordered on 3/30/2014: Size 2 HOF bands to 6.25size 3 stone ring L
4/27/2015	Inventory	001-210-01019	$1,102.50	0.158ct tdw 14kyg & Sterling Silver Citrine Dangle Earrings w/Diamonmds of I-J/SI2-SI3
4/27/2015	Inventory	001-230-01466	$904.50	0.135ct tdw 14kyg & Sterling Silver Citrine Pendant w/Diamonds of I-J/SI2-SI3
4/26/2015	Misc	Trade In	$1,500.00	Trade In: Trade In Goods - return 6 stone wedding band trade-in
4/19/2015	Inventory	001-190-07881	$46,695.00	3.13 Carat Loose Ideal Cut Round Diamond of H/SI2 Photo is 3 stone ring.
3/27/2015	Repair	001-124181-001	$150.00	Pickup Repair #001-124181-001 ordered on 10/18/2012: Ladies Atencio TT ring. Tasks:ladies Atenc
3/16/2015	Inventory	002-210-00869	$1,399.00	0.18ct tdw Sterling Silver/18kyg Dangle Earrings w/Blue Topaz & 18 Round Diamonds
3/16/2015	Inventory	001-150-04893	$1,999.00	0.67ct tdw 14kwg Ideal Cut Diamond Stud Earrings w/Diamonds of G-H/I1
11/4/2011	Repair	001-103105-001	$0.00	Pickup Repair #001-103105-001 ordered on 6/26/2009: TT Cyma watch with diamondsRivot clasp-n
6/19/2011	Inventory	002-190-05338	$23,201.00	4.03 Ct. Loose Round Brilliant Cut Diamond J Color and SI3 Clarity

3. A list of items purchased by the customer will appear.
4. For adjustments on repairs and custom jobs, see the section entitled Adjust a Repair.
5. Select the item to be returned by double-clicking on it. If the item to be returned does not appear in the list:

   a. **Select SKU….** The find item filter will appear.
   b. Enter the search parameters, include to whom the item was sold.
   c. Select **OK**. The stock number, description, and price of the item to be returned will appear on the **Point of Sale** window.



1 001-440-01265 (RETURNING) Sterling Silver 7" Double Link Bracelet

($70.00)
($4.45)
($74.45)
Fee 0.00

- **To view the original sales receipt for the item, select See Sale. The See Sale button is highlighted in green to remind you that it is useful to determine the original tender or check for a trade-in because that might affect the type of refund issued, if any. If this return involved a trade-in, this button would appear in red as an extra alert.**
- **If returning an item that was sold together with a promotion item, the promotion item may now be ineligible for that discount or giveaway. The Edge will prompt for an override. It may also only refund the difference between the returned item and the promotional item. Check your System Options concerning these settings.**

6. The **Amount Due** back to the customer will appear at the bottom of the window. Proceed with payment as detailed in the section entitled Tender Options. **System Options** determine when cash refunds may be made or when a store credit must be made.

To accommodate vendor agreements, The Edge allows you to accept returns for items, especially bulk, that you don't normally carry in inventory. The Edge will attempt to create a record for the item using the lowest price sold or based on information provided by the vendor. Be sure to account for such returns in inventory and in QuickBooks if you use it.

5.3.8.1 Care Plan Returns

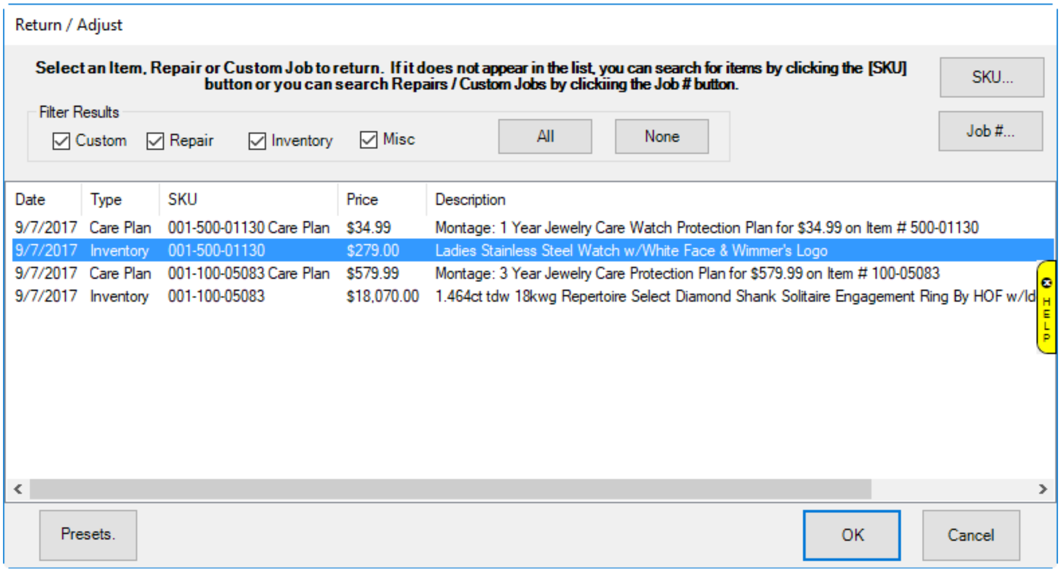
Sales that contain warranties cannot be voided or altered.

Return data should be uploaded daily from The Edge to your care plan provider along with sales data.

5.3.8.1.1 Item with Care Plan Return

If an item with a care plan is returned within the care plan return period, the care plan is returned as well. The care plan return period is specified in **System Options ► Care Plan Max Return Period**. Check with your state's laws on this. To do such a return:

1. At point of sale, find the customer.
2. Select **Return/Adjust** and locate the desired line item.



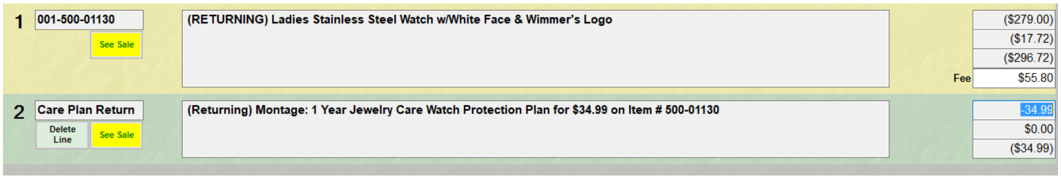
Select an Item, Repair or Custom Job to return. If it does not appear in the list, you can search for items by clicking the [SKU] button or you can search Repairs / Custom Jobs by clicking the Job # button.

Filter Results

☑ Custom ☑ Repair ☑ Inventory ☑ Misc

Date	Type	SKU	Price	Description
9/7/2017	Care Plan	001-500-01130 Care Plan	$34.99	Montage: 1 Year Jewelry Care Watch Protection Plan for $34.99 on Item # 500-01130
9/7/2017	Inventory	001-500-01130	$279.00	Ladies Stainless Steel Watch w/White Face & Wimmer's Logo
9/7/2017	Care Plan	001-100-05083 Care Plan	$579.99	Montage: 3 Year Jewelry Care Protection Plan for $579.99 on Item # 100-05083
9/7/2017	Inventory	001-100-05083	$18,070.00	1.464ct tdw 18kwg Repertoire Select Diamond Shank Solitaire Engagement Ring By HOF w/Id

3. Select **OK**. The Edge will automatically populate two line items, one for the item to return and one for the care plan to return.



1 001-500-01130 (RETURNING) Ladies Stainless Steel Watch w/White Face & Wimmer's Logo ($279.00) ($17.72) ($296.72) Fee $55.80

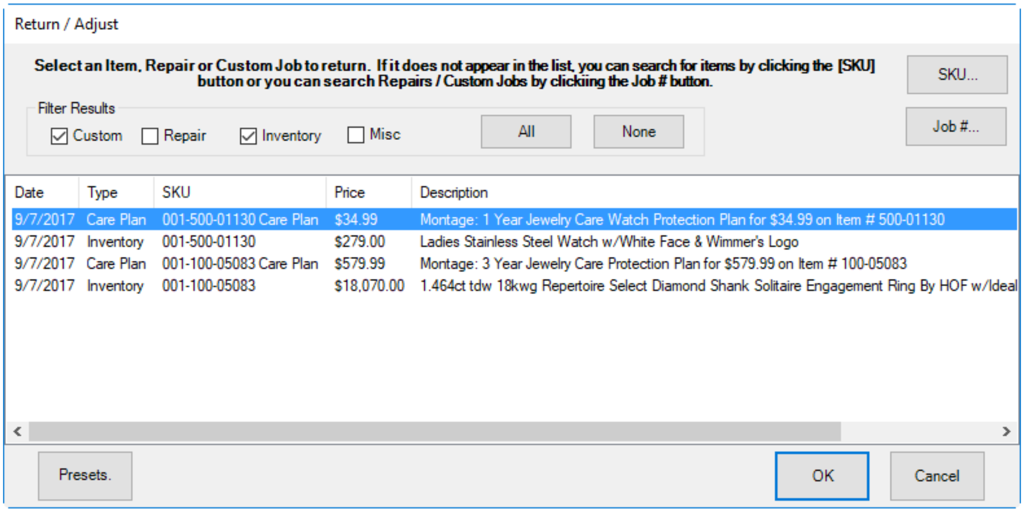
2 Care Plan Return (Returning) Montage: 1 Year Jewelry Care Watch Protection Plan for $34.99 on Item # 500-01130 -34.99 $0.00 ($34.99)

4. Continue with the return transaction as usual.

5.3.8.1.2 *Care Plan Only Return*

The plan alone can be returned as well. To receive a refund for the plan, it must be returned within the care plan return period. To do so:

1. At point of sale, find the customer.
2. Select **Return/Adjust** and locate the desired line care plan to return.



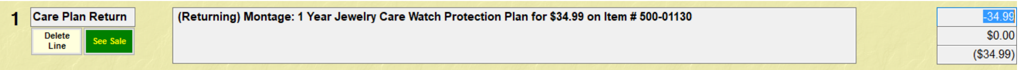
Select an Item, Repair or Custom Job to return. If it does not appear in the list, you can search for items by clicking the [SKU] button or you can search Repairs / Custom Jobs by clicking the Job # button.

Filter Results

☑ Custom ☐ Repair ☑ Inventory ☐ Misc

Date	Type	SKU	Price	Description
9/7/2017	Care Plan	001-500-01130 Care Plan	$34.99	Montage: 1 Year Jewelry Care Watch Protection Plan for $34.99 on Item # 500-01130
9/7/2017	Inventory	001-500-01130	$279.00	Ladies Stainless Steel Watch w/White Face & Wimmer's Logo
9/7/2017	Care Plan	001-100-05083 Care Plan	$579.99	Montage: 3 Year Jewelry Care Protection Plan for $579.99 on Item # 100-05083
9/7/2017	Inventory	001-100-05083	$18,070.00	1.464ct tdw 18kwg Repertoire Select Diamond Shank Solitaire Engagement Ring By HOF w/Ideal

3. The Edge will populate the return line item.



1 Care Plan Return

(Returning) Montage: 1 Year Jewelry Care Watch Protection Plan for $34.99 on Item # 500-01130

-34.99
$0.00
($34.99)

4. Process the return as usual.

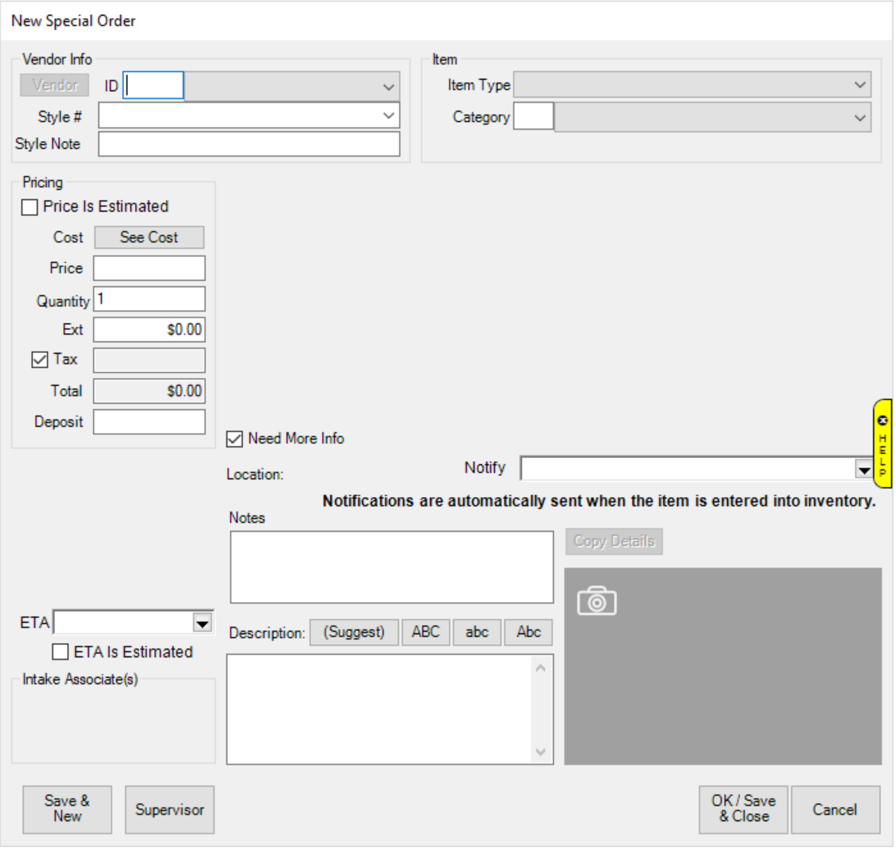
5.3.8.1.3 Care Plan Returns Outside of Return Period

If the item or care plan return is outside the care plan return period, check with your care plan provider. The care plan fee may be prorated. It cannot be returned through The Edge.

5.3.9 Special Order Intake

A customer may request a special order. To process a special order:

1. Select the **Special Order** option from the **Point of Sale** window. The **New Special Order** window will appear.



☐ Price Is Estimated

Quantity 1

Ext $0.00

☑ Tax

Total $0.00

☑ Need More Info

Notifications are automatically sent when the item is entered into inventory.

☐ ETA Is Estimated

Notice that as selections are made in the **New Special Order** window, fields pertinent to the special order will appear. Fields and options in the **New Special Order** window may include:

Vendor Info	Enter or select from the drop-down list a vendor for the item.
ID	The vendor's ID in The Edge.
Style#	The vendor's style number.
Style Note	Text added to the style number that will help identify the item. For example, it might be stone type, size, etc.
Item	
Item Type	Enter a generic type of item desired.
Category	Enter or select a category for the item.

Either Item Type or Category is required. When either field is specified, an additional section regarding item details is enabled.

Pricing	Contains pricing options.
Price is Estimated	Indicates that the price is an estimate. It will show as such on the receipt. If you do check this box, you will be offered three additional options:

To Be Determined	Indicates that the estimate should be provided when more information about the order is available.
Call Before Starting	Indicates that the customer wants to know the real price before you place the order.
Do Not Exceed…	Indicates that if the price is over the indicated amount, the customer does not want the item.

Cost	Cost of the item to the store.
Price	Price of the item to the customer.
Quantity	Quantity of the item desired.
Ext	Extended price, or price times quantity.
Tax	Whether tax is to be collected; the amount will be calculated based on the price.
Total	Total of the price plus tax. This is calculated for you.
Deposit	Amount the customer is paying as a deposit.
Need More Info	If the item cannot be ordered from a vendor until more information is gathered, select this option.
Location	To be populated using the **Move Envelope** function.
Notify	Allows you to select the method by which to notify the customer when the order is in. For more information, see the section entitled Notifications.
Details	These fields vary according the item type or category, similar to the way the **Item Entry** window works.
ETA	Estimated Time of Arrival. The date that this item is expected to arrive. Enter or select a specific date from the date picker.
ETA is Estimated	Indicates that the ETA might not be accurate.
Notes	Notes for this special order. These will print on the envelope, but not on the receipt.
Description	The description of the item to be ordered. This should be detailed enough to place the order.

Copy Details	Allows you to select a similar item from which to copy details. After which, you can alter details as needed to meet requirements for this special order.

2. Enter as much information as is available from the options listed on the window. If you enter a style number that has been used before, The Edge will prompt you to copy the details into this record. You can then refine the information for this order.
3. Select **OK/Save & Close** to save the data and add a new sale line to the **Point of Sale** window.

For more about working with and receiving Special Orders, see the section entitled Special Orders.

5.3.9.1 Taking Special Order Payments

Sometimes a customer may want to make a payment against an outstanding special order prior to pickup. To process a payment:

1. Go to **Point of Sale**.
2. Select **Find Cust** and search for the customer (or scan the claim check).
3. Select **Make Payment**.
4. The **Make a Payment** window will appear containing any open balances. Check the special order record and select **OK**.
5. Enter amount of payment.
6. Finish the transaction.

5.3.9.2 Special Order Pickup

A special order item will only be available for pickup if an item has been matched to it. To do so:

1. From **Point of Sale, se**lect **Find Customer** and search for the customer (or scan their claim check).
2. Select **Pickup/Finish** (lights up green when transactions available for pickup).
3. The **Pickup** window will appear with any available pickups.
4. Check the special order record and select **OK**.
5. Finish the transaction. Any remaining balance will be due.

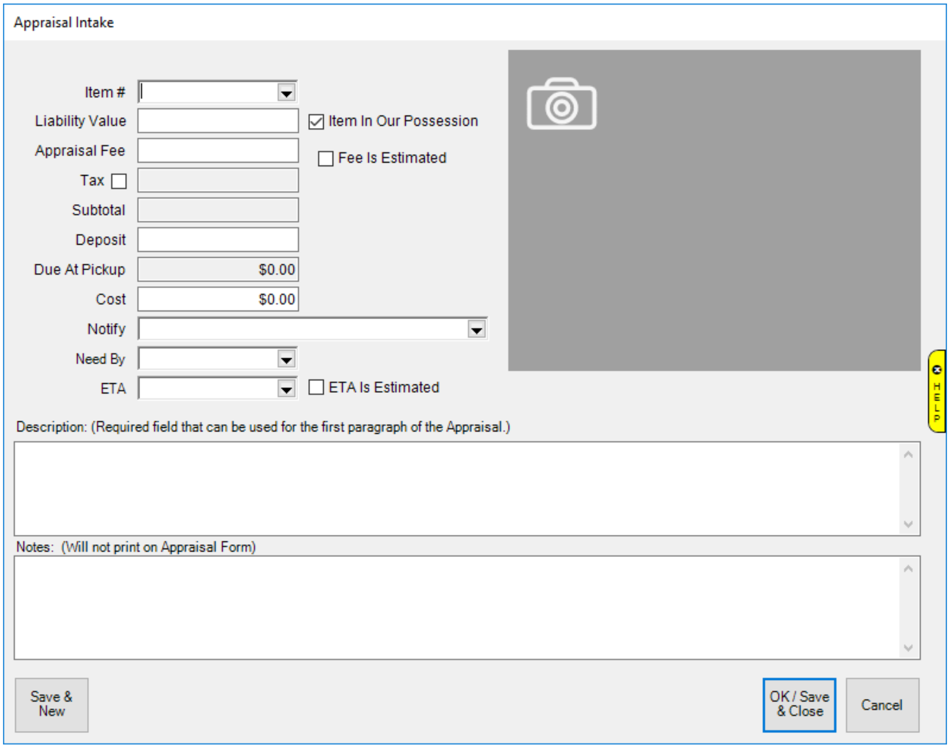
5.3.9.3 Taking Special Order Returns

In The Edge, special order return is treated just like any other item. The store must establish and enforce, apart from The Edge, its own rules regarding returns of special order items. As part of this policy, you should decide whether returned special order items retain the special order stock type or whether they should then become stock items. This is adjustable via the stock type field on the item record. By default, The Edge will leave this set to special order.

5.3.10 Appraisal Intake

To document an order being accepted for appraisal:

1. Select **Appraisal Intake** from the **Point of Sale** window. The **Appraisal Intake** window will appear.



☑ Item In Our Possession

Due At Pickup: $0.00

Cost: $0.00

Description: (Required field that can be used for the first paragraph of the Appraisal.)

Notes: (Will not print on Appraisal Form)

Fields and options in the **Appraisal Intake** window include:

Item #	If an item is or was part of The Edge inventory, use the drop-down options to find the item.
	If the selected item has a completed Pre-Appraise tab, that information will be added here automatically.
Camera icon (📷)	Allows you to photograph the item for reference. See the section entitled Photographing an Item for more information. Note that many photographs can be added when performing the appraisal. You can also insert an existing image file. For more information, see the section entitled Adding and Managing Photos.
Liability Value	The value of the item, pre-appraisal, in the event of a loss.

Item in our possession	Whether the item was left at the store as opposed to doing the appraisal based on existing records.
Appr Fee	The fee to be charged to the customer for the appraisal service.
Fee is Estimated	Whether the fee is fixed or an estimate to be confirmed.
Tax	Whether the fee is taxable. If it is, the tax field will be calculated by The Edge.
Subtotal	The fee plus tax. This value is calculated for you.
Deposit	The deposit to be left by the customer toward the fee.
Due at Pickup	The remainder of the subtotal to be paid when the item is picked up.
Cost	The cost of this appraisal.
Notify	Allows you to select the method by which to automatically notify the customer when the appraisal is complete. For more information, see the section entitled Notifications.
Need by	The day by when the customer requires the appraisal.
ETA	Estimated day when the appraisal will be complete and the item available for pickup.
Description	A description of the item.
Notes	Additional notes about the item or the appraisal request. These notes appear only on internal documents, not on any document the customer should see.
ETA is Estimated	Whether the ETA is estimated or firm from the appraiser.

2. When as much information as possible about the item has been entered, select **OK**. The appraisal will be added as a sale line item to the **Point of Sale** window.

You are not actually doing the appraisal at this time, just taking it in as an order. See the section entitled Appraisal for information on managing the actual appraisal.

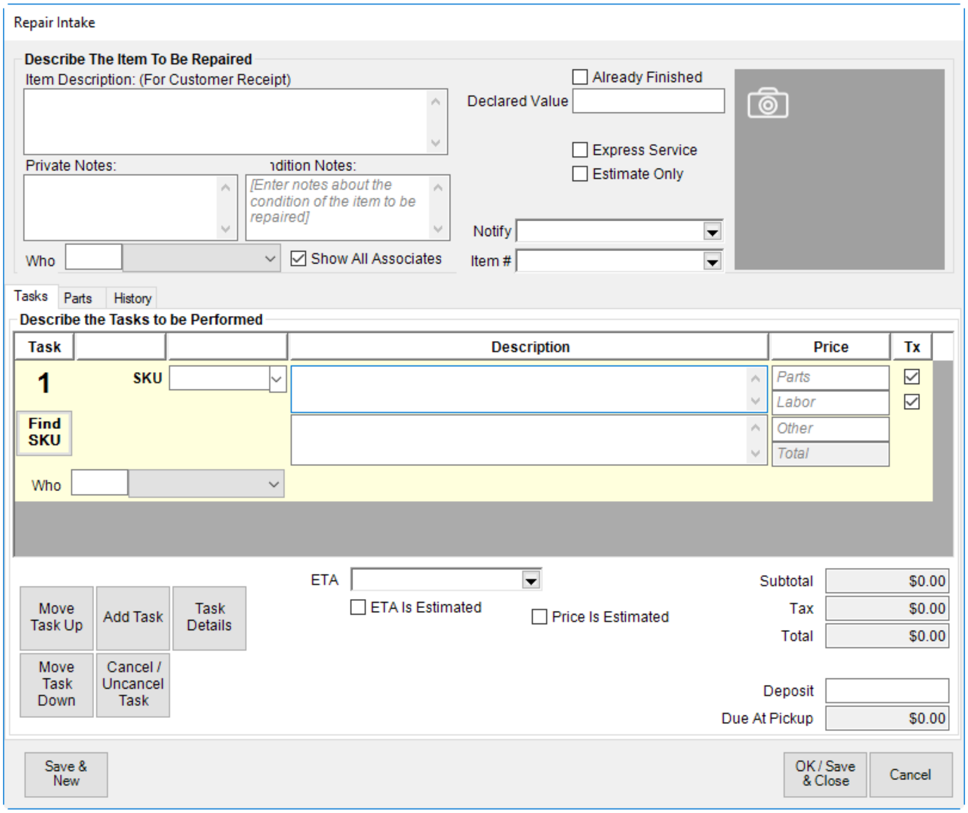
5.3.11 Repair Intake

To accept an item for repair, select **Repair Intake** from the **Point of Sale** window. The **Repair Intake** window will appear with the **Tasks** tab showing. The **Repair Intake** window is divided into two sections. The top section takes information about the item to be repaired and the bottom section takes information about the required repair details.

For a video tutorial about Repair and Custom Job Intake at POS, go to http://www.screencast.com/t/KvV0G9Wprc.

5.3.11.1 Repair Information

Data fields in the top part of the **Repair Intake** window deal with taking information about the item before repair and working with tasks required to perform the repair.



Fields and options available in the top portion of the **Repair Intake** window include:

Item Description (for customer receipt)	A description of the item that will appear on the receipt.
Already Finished	In the event the item is repaired while the customer waits, check this option to indicate that tracking is not necessary. Doing so creates a one-step repair that does not require pickup and is counted as finished immediately.
Camera icon (📷)	Allows you to photograph the item for reference. See the section entitled Photographing an Item. Note that multiple photographs can be added to the repair history.
Declared Value	The customer's declared value of the piece. This is very important in the event of a loss; the insurance company will only pay up to this amount. Whether this is a required item is controlled by system settings.

Private Notes	Notes about the item that the customer will not see on a receipt.
Condition Notes	Notes about the condition of the item. This will not appear on the receipt.
Express Service	Select this if the customer requires a quick turnaround.

If the Express Service option is selected, an estimated date of arrival must be entered in the ETA field. This will increase the price by a factor specified in System Options.

Estimate Only	Indicates that this is an estimate, and work should not be performed until the customer has approved it.

If you're using estimates, you must record customer approval under Repair Edit.

Who	The associate to whom the task is being assigned. It is a drop-down menu of associates who are listed as jewelers in their associate records. Go to **Administrative ► Associates** to change an associate's status.
Show All Associates	Changes the **Who** drop-down menu to include associates who are not listed as jewelers so that you can assign the task to anyone.
Notify	Allows you to select the method by which to automatically notify the customer when the repair is complete. For more information, see the section entitled Notifications.
Item #	For items sold by your company, enter the item number for easy record keeping.

Enter information about the item as described above and complete the **Tasks** portion of the **Repair Intake** window. The bottom portion includes three tabs: **Tasks**, **Parts**, and **History**.

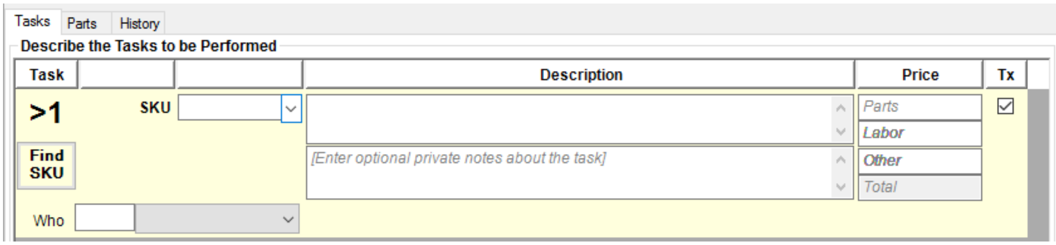
System Options may require that a photo be taken of every repair taken in.

5.3.11.2 Repair Tasks

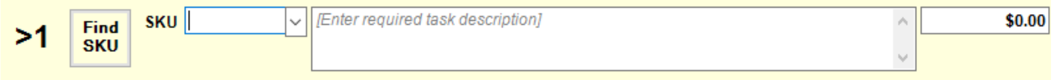
Found on the lower half of the **Repair Intake** window, the **Tasks** tab is one of three sections in the **Repair Intake** window used to collect repair instructions and information. At least one task must be entered.

To complete the **Tasks** portion of the **Repair Intake** window:

1. Select the **Tasks** tab.

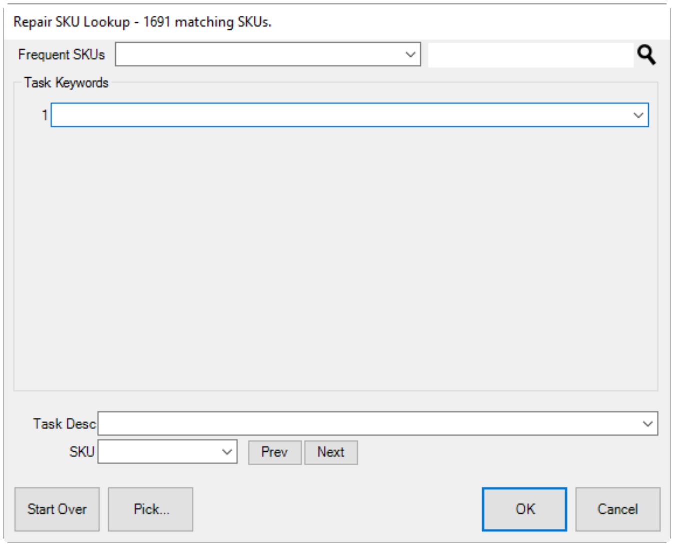


Task lines can be slimmed down to allow more lines to fit on the window. This is a setting in **System Options**. If you have that turned on, use the **Task Details** button to see the information that would be on the full-sized task line.



2. Type in a SKU or select **Find SKU** to search the SKU database. Or select the **SKU** drop-down menu for a list of frequently-used SKUs. Alternatively, you can bypass the SKU field and manually enter your task details and pricing information. To find a SKU in the database:

   a. Select **Find SKU**. The **SKU Lookup** window will appear.



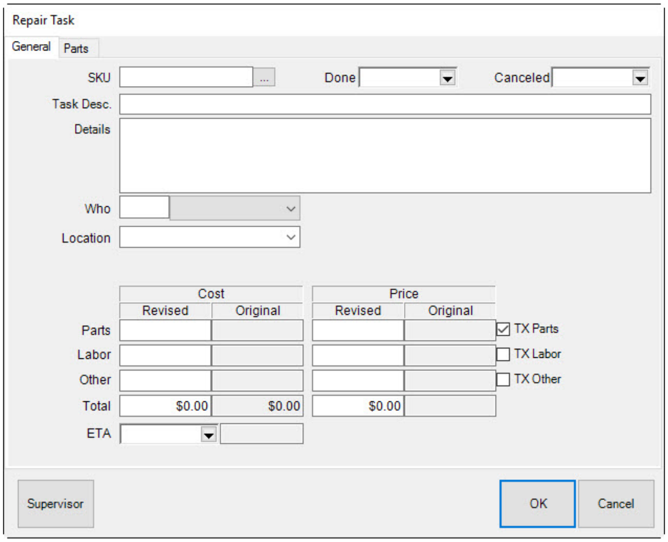
   b. Select from the **Frequent SKUs** drop-down menu.
   c. Search for a SKU from the search field (indicated by the magnifying glass icon).
   d. Type in a **Task Keyword** or choose from the drop-down list.

   e. After a **Task Keyword** has been selected, you may enter a second **Task Keyword** or enter a **Task Description** manually or by using the drop-down list.
   f. In addition, you may browse through SKUs by using the **Prev** and **Next** buttons to view SKUs currently in the system.
   g. Select the desired SKU.

Selecting Pick… will bring up a list of all matching Repair SKUs in the system.

   h. Select **OK**.

3. The task details will be retrieved from the database of repair tasks and the other fields on the task line will be pre-filled from the database. Note that dollar amounts will automatically be listed for price, labor, and additional price. Select whether tax is applicable by checking the box next to each item.
4. To add another repair task to the item, select **Add Task**. A second task line will appear to be completed as above.
5. To cancel a previously entered task, which was already saved, select **Cancel/Uncancel Task**. This will also remove the cancel date and renew the task if selected again.
6. To change the order in which a task appears on the list, select the **Move Task Up** or **Move Task Down** buttons from the bottom portion of the **Repair Intake** window.
7. To enter more specific details about a task, select **Task Details**. The **Repair Task Detail** window will appear.



☑ TX Parts
☐ TX Labor
☐ TX Other

Total: Cost Revised $0.00, Cost Original $0.00, Price Revised $0.00

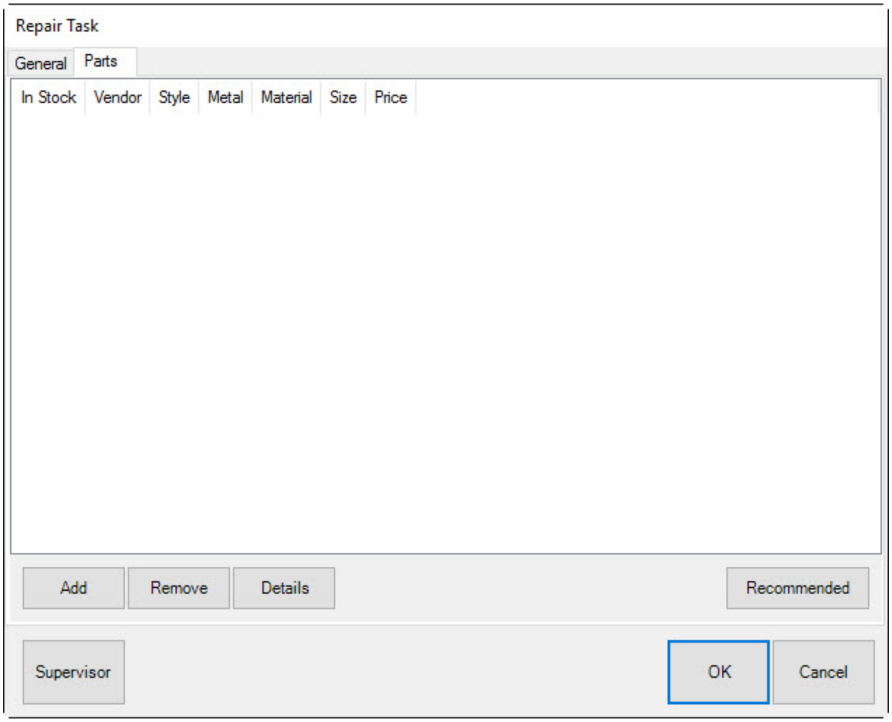
The **General** tab allows you to enter more detailed information about the repair. There are two tabs on this window. Fields and options in the **General** tab include:

SKU	Enter or browse for a SKU appropriate for this task.
Done	Use the drop-down list to enter a completion date.
Canceled	Use the drop-down list to enter a cancellation date.
Task Desc	A description of this task.
Details	Enter any notes about the task that might assist the technician.
Who	Enter the associate ID number of the repair technician to whom the task was or is assigned.
Where	Enter the workstation or outside location where the task was or is to be performed.
Cost	The following fields apply to cost.
Revised Parts	Enter the updated cost to the store for parts.
Revised Labor	Enter the updated cost to the store for labor.
Revised Other	Enter the updated cost to the store for other repair expenses (shipping, etc.).
Revised Total	Enter the updated total cost to the store.
Original Parts	Contains the original cost to the store for parts.
Original Labor	Contains the original cost to the store for labor.
Original Other	Contains the original cost to the store for other expenses.
Original Total	Contains the original total cost to the store.
Price	The following fields apply to price.
Revised Parts	Enter the updated price to the customer for parts.
Revised Labor	Enter the updated price to the customer for labor.
Revised Other	Enter the updated price to the customer for other expenses.
Revised Total	Enter the updated total price to the customer.
Original Parts	Contains the original price to the customer for parts.
Original Labor	Contains the original price to the customer for labor.
Original Other	Contains the original price to the customer for other expenses.
Original Total	Contains the original total price to the customer.

The Revised fields offer entry fields for original data if this is a new task or for an update if task expectations change. The Original fields will be empty the first time the task is entered, but will contain values if the record is changed.

TX Parts	Whether the price of parts is to be taxed.
TX Labor	Whether the price of labor is to be taxed.

TX Other	Whether the price of other expenses is to be taxed.
ETA	Use the drop-down list to select a date that the task should be completed.



In the **Parts** tab of the **Task Details** window, parts for the task will be listed. Fields and options in the **Parts** tab include:

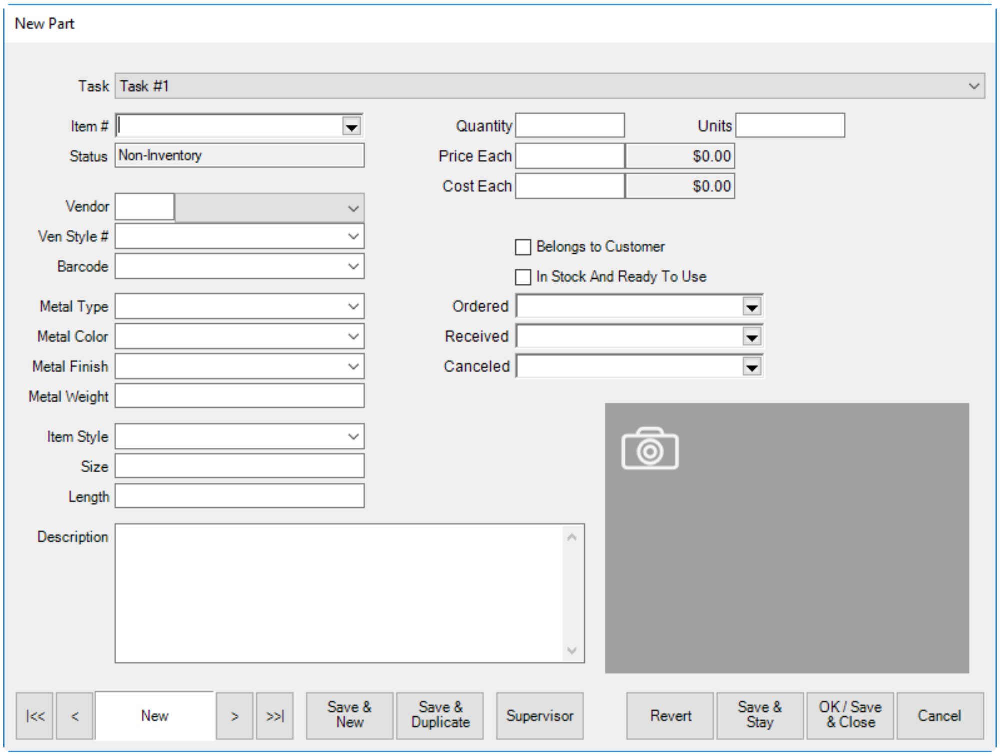
In Stock	Indicates whether the part is available in-house or must be ordered.
Vendor	The vendor from whom the part was or is to be ordered.
Style	The style number for the part.
Metal	The type of metal of which the part is made.
Material	The material of which the part is made.
Size	The part size required for the repair.
Price	The price of the part to the customer.
Add	Allows you to add a part to the task in a separate window that contains fields similar to those listed above as well as others.
Task#	Parts are assigned to tasks rather than the repair in general. This is the task for which this part is needed.

Item#	If the part is an item in the store’s inventory, the SKU to be taken out of inventory and used in this task.
Remove	Remove a part from the task.
Details	Contains part details.
Recommended	Offers a list of recommended parts. This information can also be found in the **Parts** tab in the **Task Details** area of the **Repair Intake** window.

With IUOM and PRE inventory used as parts, it is important to treat consumption for service jobs to account for both the amount (ct, grams, etc.) and the quantity (1 diamond, 1 piece, etc.). For service, it means creating a part line for each part and enter the unit of measure. For example, if you use three .10-ct diamonds for a job, you must specify this by adding three separate parts, each being .10 carats. Do not add one part of .30 carats as this would not properly reduce the physical quantity available in stock and your resulting inventory would be off.

Details about parts used in the repair can also be viewed by selecting the Parts tab from the bottom half of the Repair Intake window.

8. Add parts by selecting **Add** from the **Parts** tab of the **Repair Details** window. The **New Part** window will appear.



New Part

Task: Task #1

Status: Non-Inventory

Price Each: $0.00

Cost Each: $0.00

☐ Belongs to Customer

☐ In Stock And Ready To Use

Fields and options in the **New Part** window include:

Task	The task number in the repair and its description.
Item #	The item ID, if the item is sold in the store.
Vendor	The vendor ID.
Ven Style#	The vendor’s style number or SKU for the item.
Barcode	The barcode for the item, if it is sold in the store.
Metal Type	The type of metal the item is made of, if applicable.
Metal Color	The color of the metal, if applicable.
Metal Weight	The metal weight of the item.
Item Style	The style of the part.
Size	The size of the part.
Length	The length of the part, if applicable.
Description	A description of the part.
Quantity	How many of the part is required.
UOM	How the parts are quantified, e.g., each, per ounce, per inch, etc.

Price Each	The price to the customer for each unit of measure.
Cost Each	The cost to the store for each unit of measure.
Belongs to Customer	The part is provided by the customer for use in the job. If checked, the price of the part will be hidden.

If this is checked, the Price Each and Cost Each fields on this window will disappear. A new field, Declared Value, will appear. This allows you and/or the customer to provide an estimated value from the customer for liability purposes. Finally, it changes the part status from Non-Inventory to Customer-Owned.

In Stock and Ready to Use	The part is readily available.
Ordered	When the part was ordered. This must be done in purchasing.
Received	When the part was received.
Canceled	If and when the part order was canceled.

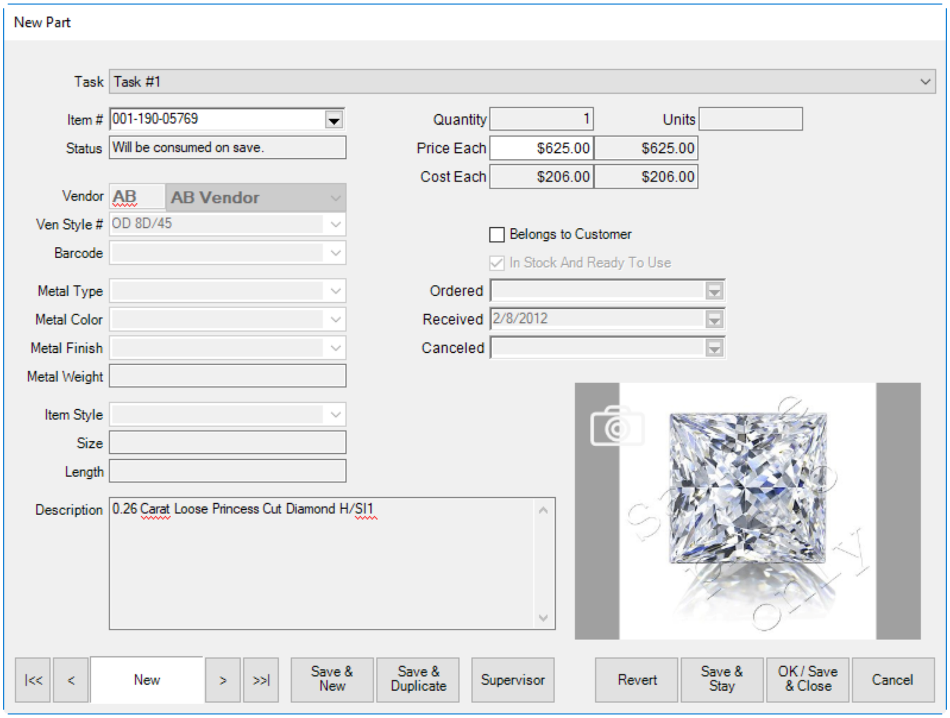
9. Enter an estimated time of arrival in the **ETA** field or select a date from the drop-down calendar. If estimated time of arrival is estimated, select **ETA is Estimated**.
10. After a task is entered, a price will be listed at the left of the window. If this price is estimated, select the **Price is Estimated** box. When selected, this box will ask you to choose from the following:

    - **To Be Determined**
    - **Call Before Starting**
    - **Do Not Exceed…**

    Select all that are appropriate by checking the boxes. If **Do Not Exceed…** is selected, a dollar amount must be entered into the adjoining field.

5.3.11.3 Repair Parts

After adding the details described above, the **Parts** tab of the **Repair Intake** window will show that part. It includes details about the parts used in the repair, including vendor, style, metal, material, size, and price.



New Part

Task: Task #1

Item #: 001-190-05769

Status: Will be consumed on save.

Vendor: AB AB Vendor

Ven Style #: OD 8D/45

Barcode:

Metal Type:

Metal Color:

Metal Finish:

Metal Weight:

Item Style:

Size:

Length:

Description: 0.26 Carat Loose Princess Cut Diamond H/SI1

Quantity: 1

Units:

Price Each: $625.00 $625.00

Cost Each: $206.00 $206.00

☐ Belongs to Customer

☑ In Stock And Ready To Use

Ordered:

Received: 2/8/2012

Canceled:

The **Parts** window lists parts required for the repair. Data listed in the **Parts** tab includes:

In Stock	Indicates whether the part is available in-house or must be ordered.
Task	Indicates for what task the part is needed.
SKU	The SKU for the part.
Vendor	The vendor from whom the part was or is to be ordered.
Style	The style number for the part.
Metal	The type of metal of which the part is made.
Material	The material of which the part is made.
Size	The part size required for the repair.
Price	The price of the part to the customer.
Add	Directs you to add a part to a task.
Remove	Directs you to remove a part from the task.
Details	Contains part details.
Recommended	Offers a list of recommended parts. This information can also be found by selecting the **Parts** tab in the **Task Details** area of the **Repair Intake** window.

5.3.11.4 Repair History

The **History** tab provides information about the history of the piece in for repairs, including details about previous repairs, who worked on the piece, and any additional notes that were recorded.

The history tab can be used to take additional photographs of this repair. You may add one additional photograph per added note. This is useful for documenting before-and-after on a repaired piece.

Select **Save & New** from the bottom of the window to record additional repairs in a separate envelope or select **OK/Save & Close** to complete the repair order, close the **Repair Intake** window, and return to the **Point of Sale** window.

5.3.11.5 Adjust a Repair

Occasionally, it may be necessary to make adjustments to repair or custom jobs that are already marked as picked up. These adjustments could be simple monetary changes (refunding money or collecting more) or could be changes such as adding tasks or parts. Here are a couple examples.

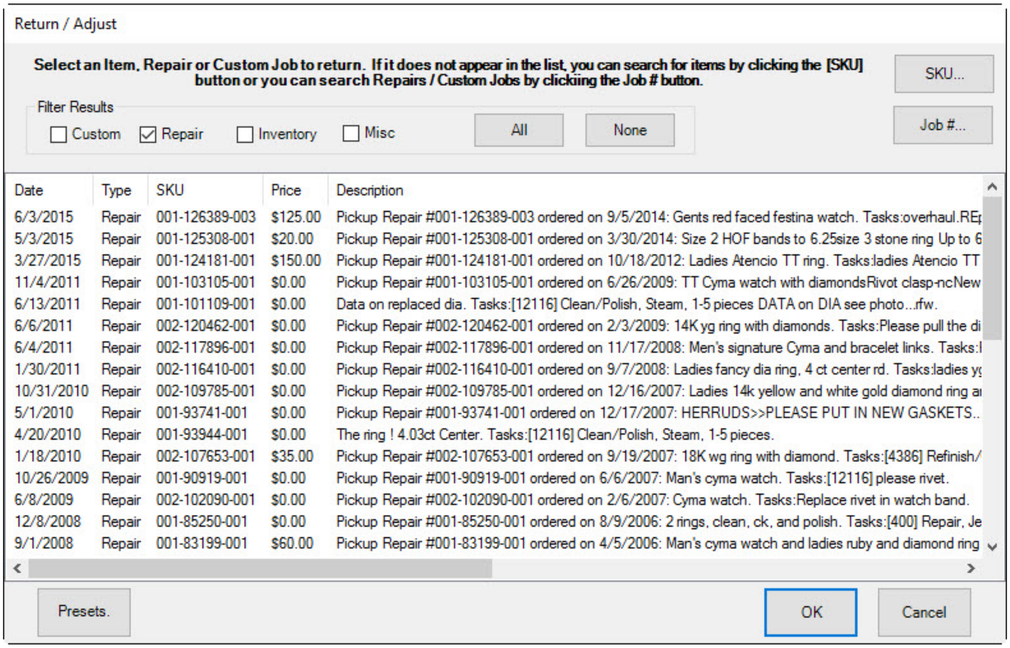
Example 1. A customer decides some quick additional work is necessary, which is done while the customer waits when they bring the job back in. Additional tasks can quickly be added and charged for as an adjustment on the existing job.

Example 2. A customer is dissatisfied with work performed and you decide to refund the money paid. This could be done as an adjustment in a similar to performing a return of merchandise.

- **Adjustments made to repair or custom jobs do not change the status of the job to open.**
- **If a repair is adjusted, the adjustment cannot be voided later.**

The following steps will guide you through a simple adjustment to refund money to a customer:

1. From **Point of Sale**, locate the customer record.
2. Select **Return/Adjust**. A list of the customer's activities will appear.



Select an Item, Repair or Custom Job to return. If it does not appear in the list, you can search for items by clicking the [SKU] button or you can search Repairs / Custom Jobs by clickiing the Job # button.

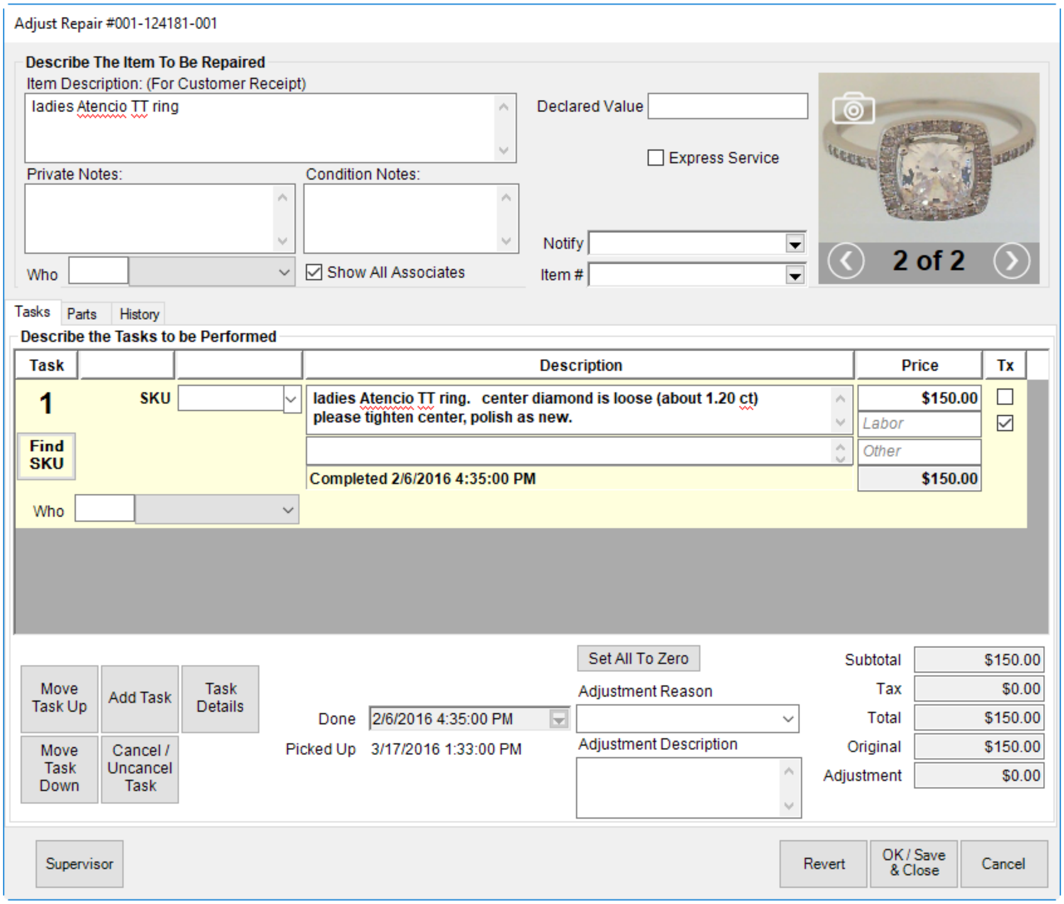
Filter Results

☐ Custom ☑ Repair ☐ Inventory ☐ Misc

Date	Type	SKU	Price	Description
6/3/2015	Repair	001-126389-003	$125.00	Pickup Repair #001-126389-003 ordered on 9/5/2014: Gents red faced festina watch. Tasks:overhaul.RE
5/3/2015	Repair	001-125308-001	$20.00	Pickup Repair #001-125308-001 ordered on 3/30/2014: Size 2 HOF bands to 6.25size 3 stone ring Up to 6
3/27/2015	Repair	001-124181-001	$150.00	Pickup Repair #001-124181-001 ordered on 10/18/2012: Ladies Atencio TT ring. Tasks:ladies Atencio TT
11/4/2011	Repair	001-103105-001	$0.00	Pickup Repair #001-103105-001 ordered on 6/26/2009: TT Cyma watch with diamondsRivot clasp-ncNew
6/13/2011	Repair	001-101109-001	$0.00	Data on replaced dia. Tasks:[12116] Clean/Polish, Steam, 1-5 pieces DATA on DIA see photo...rfw.
6/6/2011	Repair	002-120462-001	$0.00	Pickup Repair #002-120462-001 ordered on 2/3/2009: 14K yg ring with diamonds. Tasks:Please pull the di
6/4/2011	Repair	002-117896-001	$0.00	Pickup Repair #002-117896-001 ordered on 11/17/2008: Men's signature Cyma and bracelet links. Tasks:
1/30/2011	Repair	002-116410-001	$0.00	Pickup Repair #002-116410-001 ordered on 9/7/2008: Ladies fancy dia ring, 4 ct center rd. Tasks:ladies y
10/31/2010	Repair	002-109785-001	$0.00	Pickup Repair #002-109785-001 ordered on 12/16/2007: Ladies 14k yellow and white gold diamond ring a
5/1/2010	Repair	001-93741-001	$0.00	Pickup Repair #001-93741-001 ordered on 12/17/2007: HERRUDS>>PLEASE PUT IN NEW GASKETS..
4/20/2010	Repair	001-93944-001	$0.00	The ring ! 4.03ct Center. Tasks:[12116] Clean/Polish, Steam, 1-5 pieces.
1/18/2010	Repair	002-107653-001	$35.00	Pickup Repair #002-107653-001 ordered on 9/19/2007: 18K wg ring with diamond. Tasks:[4386] Refinish/
10/26/2009	Repair	001-90919-001	$0.00	Pickup Repair #001-90919-001 ordered on 6/6/2007: Man's cyma watch. Tasks:[12116] please rivet.
6/8/2009	Repair	002-102090-001	$0.00	Pickup Repair #002-102090-001 ordered on 2/6/2007: Cyma watch. Tasks:Replace rivet in watch band.
12/8/2008	Repair	001-85250-001	$0.00	Pickup Repair #001-85250-001 ordered on 8/9/2006: 2 rings, clean, ck, and polish. Tasks:[400] Repair, Je
9/1/2008	Repair	001-83199-001	$60.00	Pickup Repair #001-83199-001 ordered on 4/5/2006: Man's cyma watch and ladies ruby and diamond ring

You can filter the results by item type, repair, or other transaction.

3. Find the repair in question and double click it or select it and select **OK**. The **Point of Sale** window will open the repair record.



Adjust Repair #001-124181-001

Describe The Item To Be Repaired

Item Description: (For Customer Receipt) ladies Atencio TT ring

Declared Value

☐ Express Service

Private Notes:

Condition Notes:

Who

☑ Show All Associates

Notify

Item #

Describe the Tasks to be Performed

Task			Description	Price	Tx
1	SKU		ladies Atencio TT ring. center diamond is loose (about 1.20 ct) please tighten center, polish as new.	$150.00	☐
				Labor	☑
				Other	
			Completed 2/6/2016 4:35:00 PM	$150.00	

Who

Done 2/6/2016 4:35:00 PM

Picked Up 3/17/2016 1:33:00 PM

Adjustment Reason

Adjustment Description

Subtotal	$150.00
Tax	$0.00
Total	$150.00
Original	$150.00
Adjustment	$0.00

4. Change the **Parts**, **Labor** or **Other** price fields to reflect the amount being refunded. If the charges are being refunded in full, select **Set All to Zero**.

- **All adjusted fields in the Adjust Repair will be highlighted in yellow.**
- **Right click any adjusted field and choose `original value` to undo the adjustment.**
- **Revert button will undo all adjustments on the window.**
- **If the job was previously adjusted, "Previously Adjusted by (associate) and Date" will appear in red.**
- **Original total and adjustment total will appear on the window.**
- **Any money due back to or from the customer will be tendered at the Point of Sale window after saving the adjustment.**

5. Select a reason for the adjustment from the **Adjustment Reason** drop-down menu. This is required.

To modify Adjustment Reasons, go to Administrative ► Lists and edit the Repair/Adjustment Reason list.

6. Enter a description in the **Adjustment Description** field. This is required.

This text from both the Adjustment Reason field and Adjustment Description field will appear on the customer's receipt.

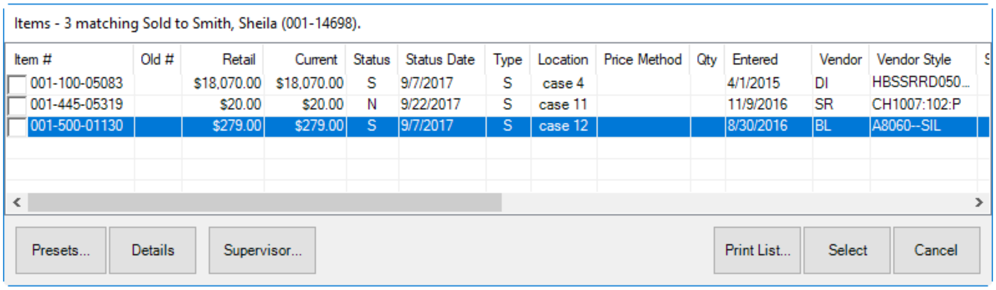
7. To quickly refund everything and set all price amounts to zero, select **Set All to Zero**.
8. Select **OK/Save & Close**.
9. Continue with the other sales transactions as normal.

5.3.11.6 Working with Care Plan-Covered Repairs

Before charging the customer for repairs, be aware of what types of repairs are covered and for how long. Some care plan providers may provide a list of places where customers can take their repairs, but we feel they will most likely come to you.

If a customer brings in an item from repair and the item was bought from your store, at intake:

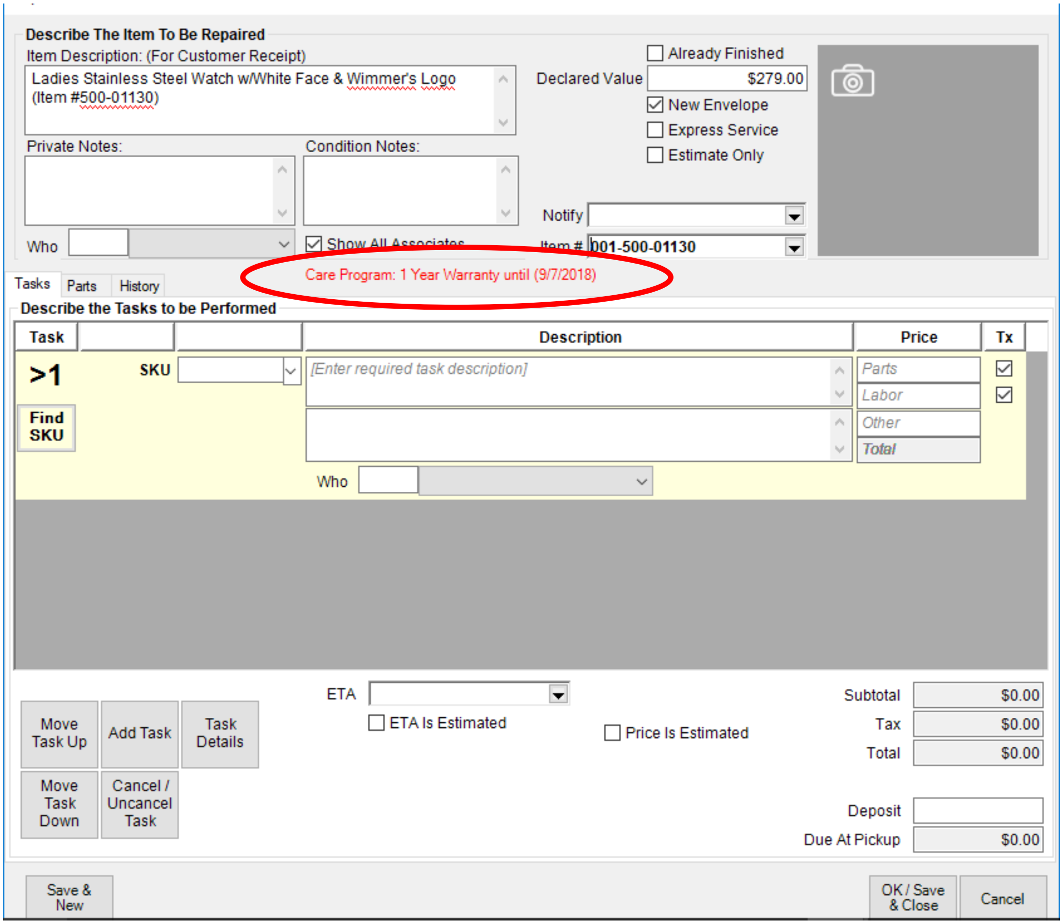
1. Bring up the customer at point of sale.
2. Select **Repair Intake**.
3. From the **Item #** drop-down menu, select **Bought**. A list of items purchased by the customer will appear.



Items - 3 matching Sold to Smith, Sheila (001-14698).

Item #	Old #	Retail	Current	Status	Status Date	Type	Location	Price Method	Qty	Entered	Vendor	Vendor Style
☐ 001-100-05083		$18,070.00	$18,070.00	S	9/7/2017	S	case 4			4/1/2015	DI	HBSSRRD050...
☐ 001-445-05319		$20.00	$20.00	N	9/22/2017	S	case 11			11/9/2016	SR	CH1007:102:P
☐ 001-500-01130		$279.00	$279.00	S	9/7/2017	S	case 12			8/30/2016	BL	A8060--SIL

4. Select the item to be repaired. The **Repair Intake** window will show that the item has a care plan.



Describe The Item To Be Repaired

Item Description: (For Customer Receipt)
Ladies Stainless Steel Watch w/White Face & Wimmer's Logo
(Item #500-01130)

☐ Already Finished
Declared Value $279.00
☑ New Envelope
☐ Express Service
☐ Estimate Only

Private Notes:
Condition Notes:
Who
☑ Show All Associates
Notify
Item # 001-500-01130

Care Program: 1 Year Warranty until (9/7/2018)

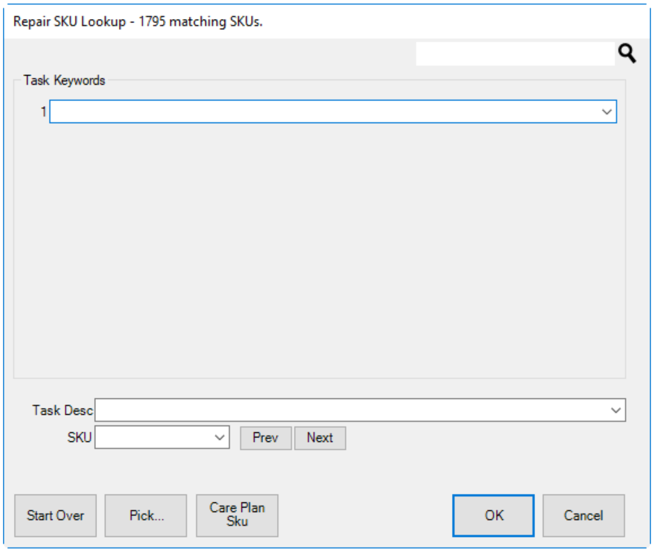
Describe the Tasks to be Performed

Task			Description	Price	Tx
>1	SKU		[Enter required task description]	Parts	☑
				Labor	☑
				Other	
				Total	

ETA
☐ ETA Is Estimated
☐ Price Is Estimated

Subtotal $0.00
Tax $0.00
Total $0.00
Deposit
Due At Pickup $0.00

5. Complete the repair intake fields as usual.
6. When you get to the repair SKU, select **Find SKU**. The **Repair SKU Lookup** window will appear. The **Care Plan SKU** option will appear on the bottom of the window.



7. Select **Care Plan SKU**. The keywords `Care Plan` will appear in the keywords field.
8. The **Task Desc** and **SKU** drop-down menus will be populated with services available for covered repairs or services.
9. From the **Task Desc** drop-down menu or **SKU** drop-down menu, select the desired repair.
10. Select **OK**.
11. Complete the repair intake as usual. Notice that costs to the customer are all 0.

Ladies Stainless Steel Watch w/White Face & Wimmer's Logo (Item #500-01130) Tasks:[WW1003] [Covered by: Care Plan] Clean, Oil, Adjust - Quartz Watch.

12. When you upload activities at the end of the day, your claim for reimbursement from your care plan provider will be submitted.

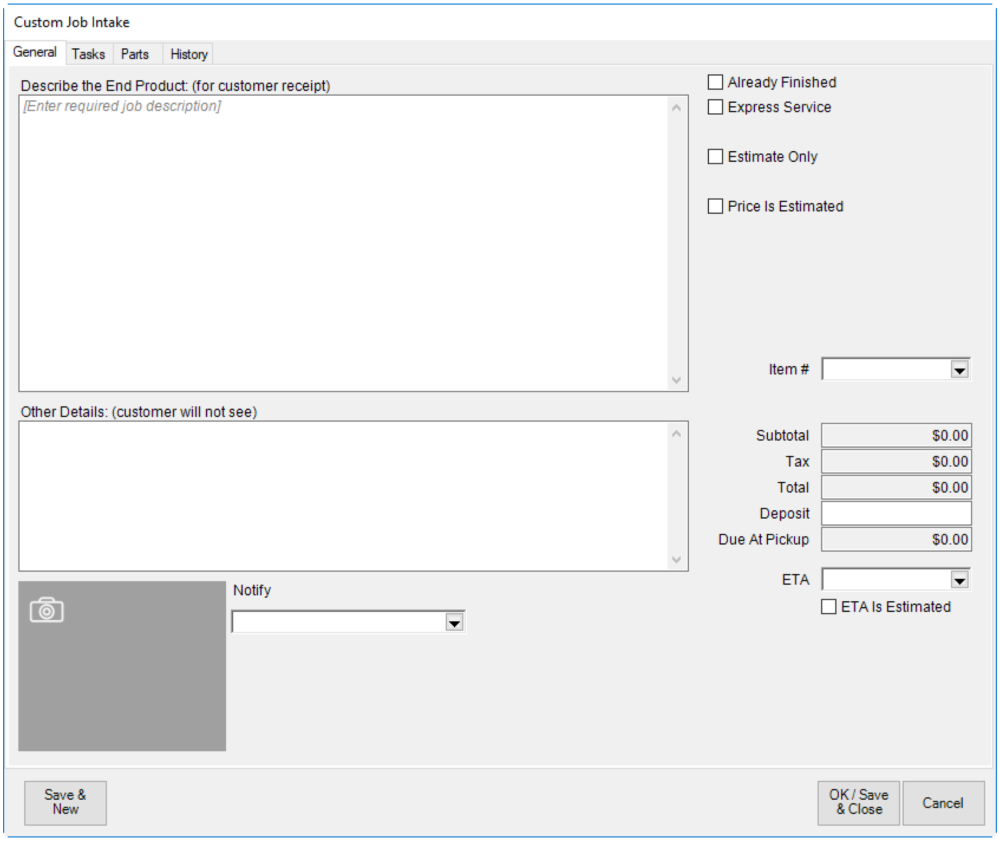
At some point you must visit your care plan provider portal to confirm that the customer is eligible for the repair. We recommend that it be after a brief initial intake before the work is performed. Then we recommend that you obtain a verbal approval to proceed before doing the work. Finally, at some point, the customer will be asked to sign off that they understand they have used that benefit.

5.3.12 Custom Job Intake

A customer may request custom work, either to modify an existing item or to create a new item.

For a video tutorial about Repair and Custom Job Intake at POS, go to http://www.screencast.com/t/KvV0G9Wprc.

To perform a custom job intake, select **Custom Job Intake** from the **Point of Sale** window. The custom job intake window is split into four tabs.



5.3.12.1 Custom Job General Tab

Describe End Product	Enter a description of the expected final product. Information entered here will print on the receipt.
Other Details	Enter details specifically for internal reference. Information entered here will not print on the receipt, but will print on the job envelope.
Already Finished	Check this box to make this a one-step custom job. With this checked, a custom job is taken in and picked up on the same receipt.
Express Service	Check this to apply the express service markup price modifier as specified in **System Options**.
Estimate Only	Check this if this custom job is only a quote and no work is to be actually performed at this time.

Price is Estimated	Indicates that the price is an estimate. It will show as such on the receipt. If you do check this box, you will be offered three additional options:

To Be Determined	Indicates that the estimate should be provided when more information about the order is available.
Call Before Starting	Indicates that the customer wants to know the real price before you start on the job.
Do Not Exceed…	Indicates that if the price is over the indicated amount, the customer does not want you to do the work.

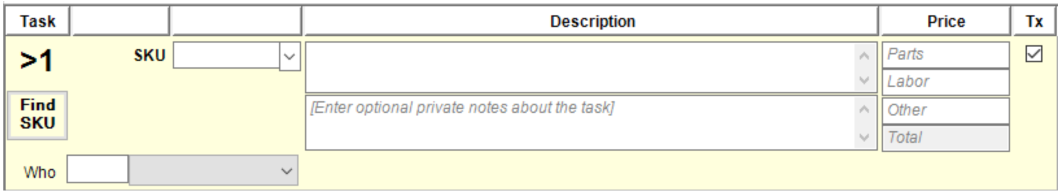
Item #	If applicable, allows you to use the **Item Find** feature to associate an inventory item record.
Declared Value	Enter the declared value of any items being taken from the customer that are being used in this custom job for liability reasons.
Subtotal	The total of the custom job without tax.
Tax	Total tax on the custom job.
Total	Final total of the custom job with tax.
Deposit	Enter the amount being put down with the custom job intake.
Due at Pickup	This is the amount due before this custom job can leave the store.
ETA	The estimated completion time for this job.
ETA is Estimated	If the ETA listed above date is not firm, check this box.
Camera icon (📷)	Use this feature to capture or attach an image.
Notify	Allows you to select the method by which to automatically notify the customer when the job is complete. For more information, see the section entitled Notifications.

5.3.12.2 Custom Job Tasks

The **Tasks** tab is one of four sections in the **Custom Job Intake** window used to collect custom job instructions and information. At least one task must be entered.

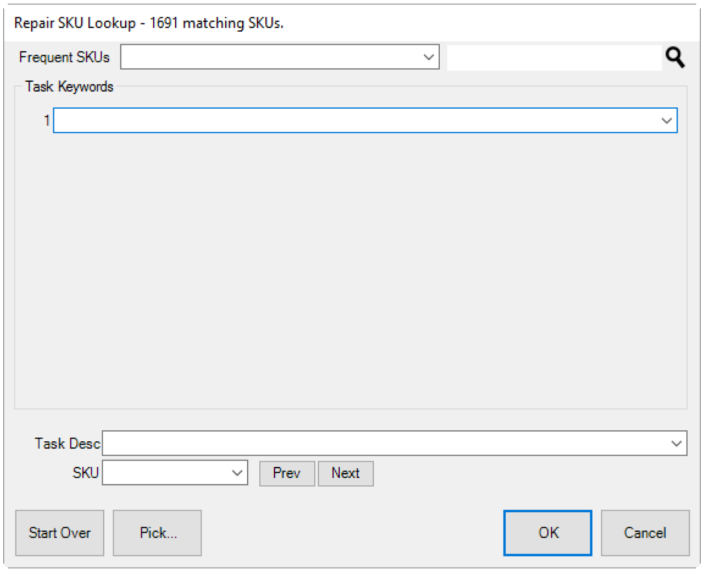
To complete the **Tasks** portion of the **Custom Job Intake** window:

1. Select the **Tasks** tab.



2. Type in a SKU or find a SKU using the **Find SKU** option. Or, use the **SKU** drop-down menu to choose from frequently-used SKUs. Alternatively, you can bypass the **SKU** field and manually enter your task details and pricing information. To find a SKU in the database:

3. Select **Find SKU**. The **SKU Lookup** window will appear.

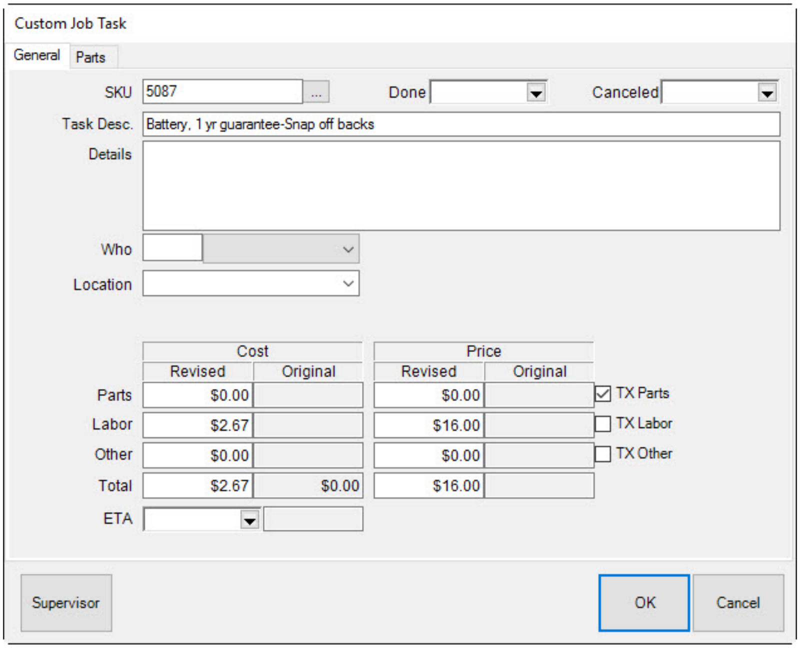


4. Select from the **Frequent SKUs** drop-down menu.
5. Search for a SKU from the search field (indicated by the magnifying glass icon)
6. Type in a **Task Keyword** or choose from the drop-down list.
7. After a **Task Keyword** has been selected, you may enter a second **Task Keyword** or enter a **Task Description** manually or by using the drop-down list.
8. In addition, you may browse through SKUs by using the **Prev** and **Next** buttons to view SKUs currently in the system.
9. Select the desired SKU.

Selecting Pick… will bring up a list of all matching Repair SKUs in the system.

10. Select **OK**.
11. The task details will be retrieved from the database of repair tasks and the other fields on the task line will be pre-filled from the database. Note that dollar amounts will automatically be listed for price, labor, and additional price. Select whether tax is applicable by checking the box next to each item.

12. To add another custom job task to the item, select **Add Task**. A second sale line will appear to be completed as above.
13. To cancel a previously entered task, which was already saved, select **Cancel/Uncancel Task**. This will also remove the cancel date and renew the task if selected again.
14. To change the order in which a task appears on the list, select the **Move Task Up** or **Move Task Down** buttons from the bottom portion of the **Custom Job Intake** window.
15. To enter more specific details about a task, select **Details**. The **Custom Job Task** window will appear.



SKU 5087

Task Desc. Battery, 1 yr guarantee-Snap off backs

	Cost		Price		
	Revised	Original	Revised	Original	
Parts	$0.00		$0.00		☑ TX Parts
Labor	$2.67		$16.00		☐ TX Labor
Other	$0.00		$0.00		☐ TX Other
Total	$2.67	$0.00	$16.00		

The **General** tab allows you to enter more detailed information about the repair. There are two tabs on this window. Fields and options in the **General** tab include:

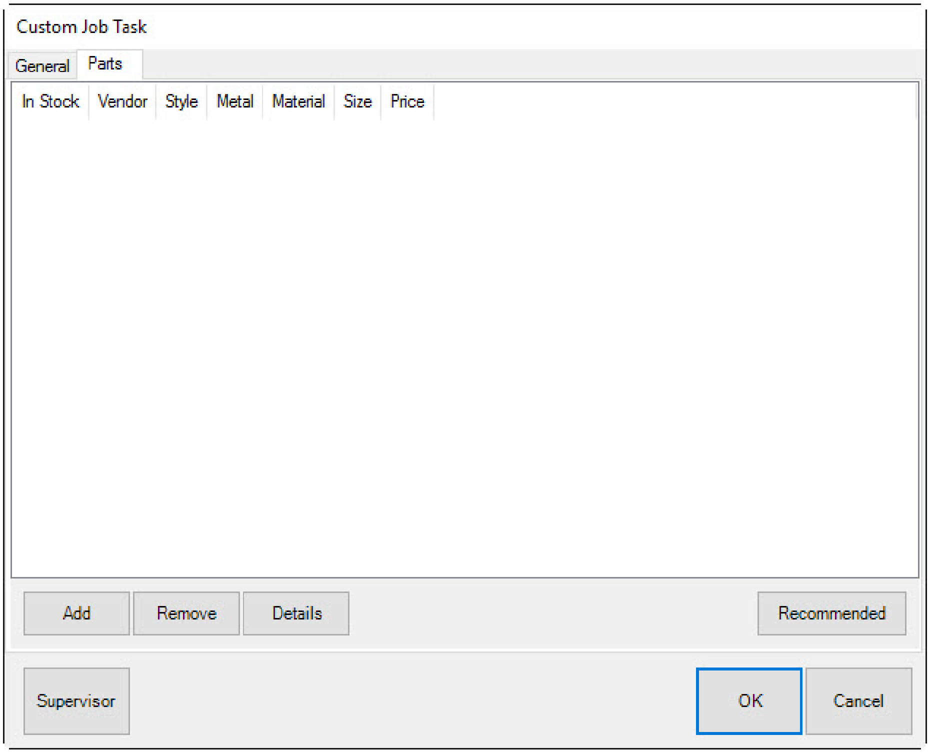
SKU	Enter or browse for a SKU appropriate for this task.
Done	Use the drop-down list to enter a completion date.
Canceled	Use the drop-down list to enter a cancellation date.
Task Desc	A description of this task.
Details	Enter any notes about the task that might assist the technician.
Who	Enter the associate ID number of the repair technician to whom the task was or is assigned.
Where	Enter the workstation or outside location where the task was or is to be performed.

Cost	The following fields apply to cost.
Revised Parts	Enter the updated cost to the store for parts.
Revised Labor	Enter the updated cost to the store for labor.
Revised Other	Enter the updated cost to the store for other repair expenses (shipping, etc.).
Revised Total	Enter the updated total cost to the store.
Original Parts	Contains the original cost to the store for parts.
Original Labor	Contains the original cost to the store for labor.
Original Other	Contains the original cost to the store for other expenses.
Original Total	Contains the original total cost to the store.
Price	The following fields apply to price.
Revised Parts	Enter the updated price to the customer for parts.
Revised Labor	Enter the updated price to the customer for labor.
Revised Other	Enter the updated price to the customer for other expenses.
Revised Total	Enter the updated total price to the customer.
Original Parts	Contains the original price to the customer for parts.
Original Labor	Contains the original price to the customer for labor.
Original Other	Contains the original price to the customer for other expenses.
Original Total	Contains the original total price to the customer.

The Revised fields offer entry fields for original data if this is a new task or for an update if task expectations change. The Original fields will be empty the first time the task is entered, but will contain values if the record is changed.

TX Parts	Whether the price of parts is to be taxed.
TX Labor	Whether the price of labor is to be taxed.
TX Other	Whether the price of other expenses is to be taxed.
ETA	Use the drop-down list to select a date that the task should be completed.

In the **Parts** tab of the **Task Details** window, parts for the task will be listed.



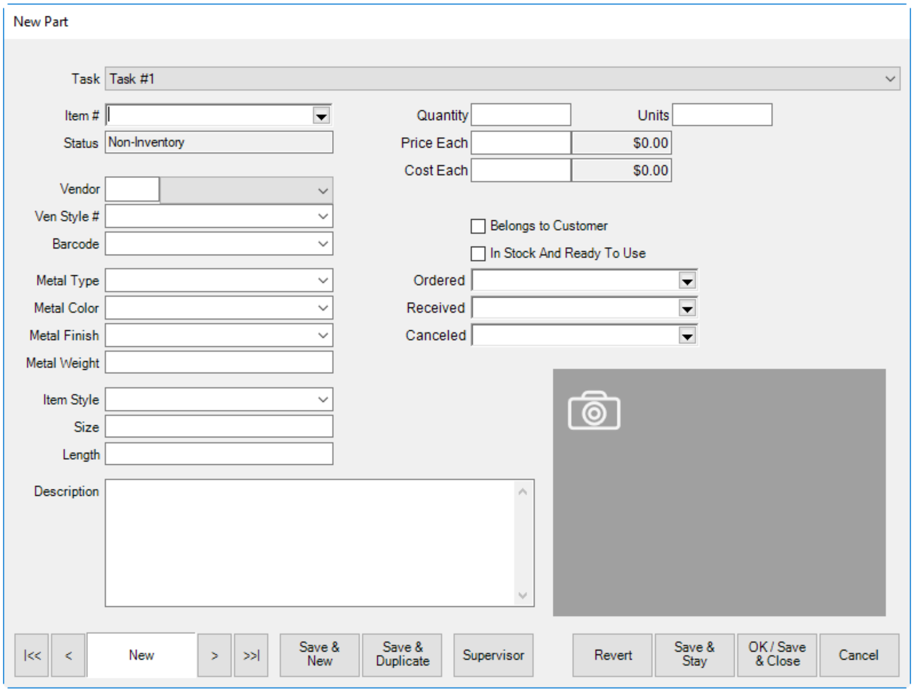
Fields and options in the **Parts** tab include:

In Stock	Indicates whether the part is available in-house or must be ordered.
Vendor	The vendor from whom the part was or is to be ordered.
Style	The style number for the part.
Metal	The type of metal of which the part is made.
Material	The material of which the part is made.
Size	The part size required for the repair.
Price	The price of the part to the customer.
Add	Allows you to add a part to the task in a separate window that contains fields similar to those listed above as well as others.
Task#	Parts are assigned to tasks rather than the repair in general. This is the task for which this part is needed.
Item#	If the part is an item in the store’s inventory, the SKU to be taken out of inventory and used in this task.
Remove	Remove a part from the task.

Details	Contains part details.
Recommended	Offers a list of recommended parts. This information can also be found in the **Parts** tab in the **Task Details** area of the **Custom Job Intake** window.

Details about parts used in the job can also be viewed by selecting the Parts tab from the bottom half of the Custom Job Intake window.

16. Add parts by selecting **Add** from the **Parts** tab of the **Custom Job Task** window. The **New Custom Part** window will appear.



New Part

Task: Task #1

Status: Non-Inventory

Price Each: $0.00

Cost Each: $0.00

☐ Belongs to Customer

☐ In Stock And Ready To Use

Fields and options in the **New Custom Part** window include:

Task	The task number in the repair and its description.
Item #	The item ID, if the item is sold in the store.
Status	The status of the item, e.g., inventory, non-inventory, etc.
Vendor	The vendor ID.
Ven Style#	The vendor's style number or SKU for the item.
Barcode	The barcode for the item, if it is sold in the store.

Metal Type	The type of metal the item is made of, if applicable.
Metal Color	The color of the metal, if applicable.
Metal Weight	The metal weight of the item.
Item Style	The style of the part.
Size	The size of the part.
Length	The length of the part, if applicable.
Description	A description of the part.
Quantity	How many of the part is required.
UOM	How the parts are quantified (e.g., each, per ounce, per inch, etc.).
Price Each	The price to the customer for each unit of measure.
Cost Each	The cost to the store for each unit of measure.
Belongs to Customer	The part is provided by the customer for use in the job. If checked, the price of the part will be hidden on the receipt.

If Belongs to Customer is checked, the Price Each and Cost Each fields on the New Part window will disappear. A new field, Declared Value, will appear. This allows you and/or the customer to provide an estimated value from the customer for liability purposes. Finally, it changes the part status from Non-Inventory to Customer-Owned.

In Stock and Ready to Use	The part is readily available.
Ordered	When the part was ordered.
Received	When the part was received.
Canceled	If and when the part order was canceled.

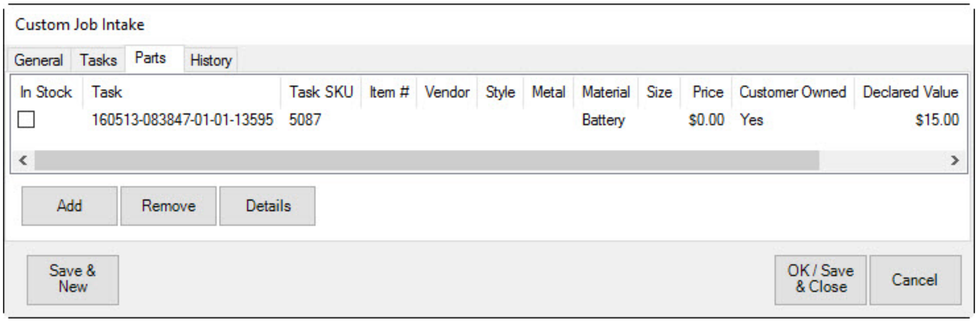
17. Enter an estimated time of arrival in the **ETA** field or select a date from the drop-down calendar. If estimated time of arrival is estimated, select **ETA is Estimated**.
18. After a task is entered, a price will be listed at the left of the window. If this price is estimated, select the **Price is Estimated** box. When selected, this box will ask you to choose from the following:

- **To Be Determined**
- **Call Before Starting**
- **Do Not Exceed…**

19. Select all that are appropriate by checking the boxes. If **Do Not Exceed…** is selected, a dollar amount must be entered into the adjoining field.

5.3.12.3 Custom Job Parts

The **Parts** tab provides a listing of the parts used in the custom job, including vendor, style, metal, material, size, and price. The parts are collected from all the task details that included adding a part.



In Stock	Task	Task SKU	Item #	Vendor	Style	Metal	Material	Size	Price	Customer Owned	Declared Value
☐	160513-083847-01-01-13595	5087					Battery		$0.00	Yes	$15.00

The **Parts** window lists parts required for the repair. Data listed in the **Parts** tab includes:

In Stock	Indicates whether the part is available in-house or must be ordered.
Task	Indicates for what task the part is needed.
Task SKU	The repair SKU.
Item #	If the part is an inventory item, the item number.
Vendor	The vendor from whom the part was or is to be ordered.
Style	The style number for the part.
Metal	The type of metal of which the part is made.
Material	The material of which the part is made.
Size	The part size required for the repair.
Price	The price of the part to the customer.
Customer Owned	If the customer provided the part, it should be indicated in the **Part** window by checking **Belongs to Customer**.
Declared Value	Enter the declared value of any items being taken from the customer that are being used in this custom job for liability reasons.

With IUOM and PRE inventory used as parts, it is important to treat consumption for service jobs to account for both the amount (ct, grams, etc.) and the quantity (1 diamond, 1 piece, etc.) For service, it means creating a part line for each part and enter the unit of measure. For example, if you use three .10-ct diamonds for a job, you must specify this by adding three separate parts, each being .10 carats. Do not add one part of .30 carats as this would not properly reduce the physical quantity available in stock and your resulting inventory would be off.

5.3.12.4 Custom Job History

The **History** tab provides information about the history of the custom job, including details about previous repairs, who worked on the piece, and any additional notes that were recorded.

The Job History tab can be used to take additional photographs of this custom job. You can add one photograph per added note. This is useful for documenting before and after on a repaired piece.

Select **Save & New** from the bottom of the window to record additional repairs in a separate envelope or select **OK/Save & Close** to complete the repair order, close the **Repair Intake** window, and return to the **Point of Sale** window.

For more about working with custom jobs, see the section entitled Repairs and Custom Jobs.

5.3.13 No Sale Tracking

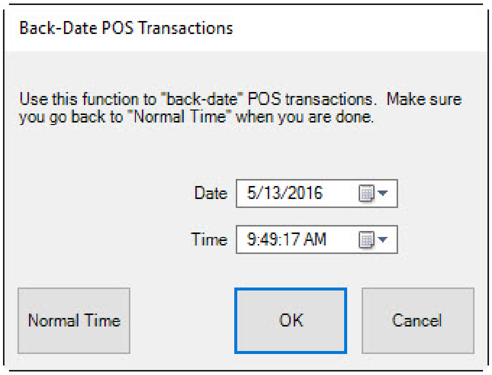
The **No Sale Tracking** button indicates that a customer was served, but no sale is to be recorded. Associates will be required to key in their IDs and passwords so the information can be included in the attendance report. Such an action can take place during another associate's activity without interfering the sale.

This information is reported on the **Attendance Report** found under **Management ► Staff**. Specifically, the **# No Sales** column indicates how many customers the associate assisted, but did not sell.

5.3.14 Backdating

The Edge allows you to backdate transactions prior to entering them at point of sale. This is useful for keeping time sensitive reports (such as Daily Activity or Sales Tax) accurate. To backdate a transaction, press the button that displays the current date and time at point of sale.

The resulting window allows you to change the time and date.



Back-Date POS Transactions

Use this function to "back-date" POS transactions. Make sure you go back to "Normal Time" when you are done.

Date 5/13/2016

Time 9:49:17 AM

After you are finished entering past transactions, be sure to revisit the backdate button and set the time and date back to normal.

Once a sale has been entered, the only details that can be altered are the customer and/or the sales associate on the transactions. If other changes are needed (such as altering payment type), you will need to void and re-enter that transaction. Be sure to backdate in these instances.

5.3.15 Park

To pause the transaction while you work with another customer, select **Park**.

To return to the parked transaction, find the parked window in the task bar at the bottom of your window and open it back up.

5.3.16 Start Over

To cancel a transaction and erase all items from the window, select **Start Over**. A dialog will appear to confirm the action. Select **Yes** to clear all current information and clear the data.

5.3.17 Open Drawer

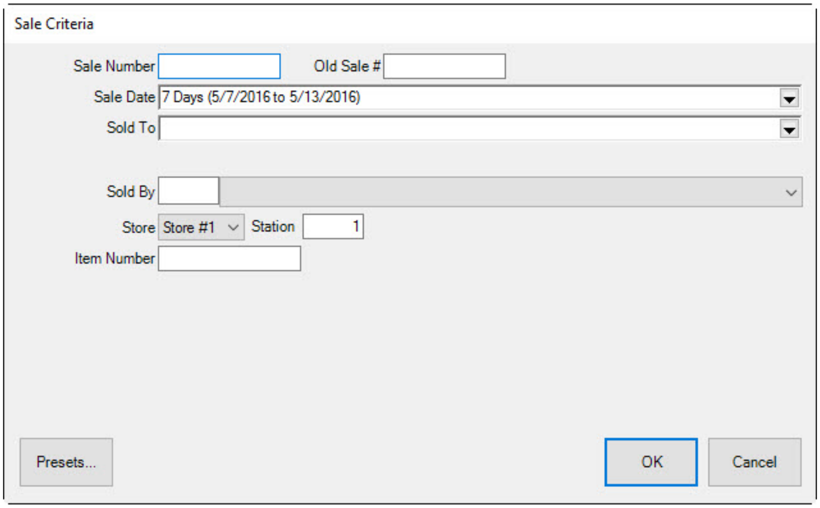
Select **Open Drawer** to open the cash register drawer. This action may require proper authorization or may be disabled entirely. These authorizations are controlled in **System Options**.

5.3.18 Review Receipts

You can look up receipts to review or make changes to a transaction. For a video tutorial about working with sales transaction record filters, go to http://www.screencast.com/t/JktYkvvS.

To review receipts of past transactions:

1. Select **Receipts** from the **Point of Sale** window. The **Sale Criteria** filter will appear. This is also available by selecting **Sales** ► **Find** from the Customer area.



Sale Criteria

Sale Number:
Old Sale #:
Sale Date: 7 Days (5/7/2016 to 5/13/2016)
Sold To:
Sold By:
Store: Store #1
Station: 1
Item Number:

2. View a specific transaction by entering a sale number in the **Sale Number** field or a range of receipts by entering a range in the **Sale Date** field using the drop-down list. To further narrow search criteria, enter a specific store, station number, and/or associate.
3. When finished, select **OK**. All sales that match the criteria will appear.
4. To print the list, select **Print List…**.
5. Double-click on a specific sale or highlight a specific sale and select **Details** to view the receipt and details about the sale and inventory.

Selecting Review Receipts has the same effect as performing a Customer ► Sales ► Find command.

5.3.19 Promotional Giveaways

The **Give this Item** feature allows you to keep proper accounting for items given away for promotional reasons. In giving items away, there are no particular tax benefits, unlike in donating items, which are tracked in the **Donate this Item** feature.

5.3.19.1 Giveaway Setup

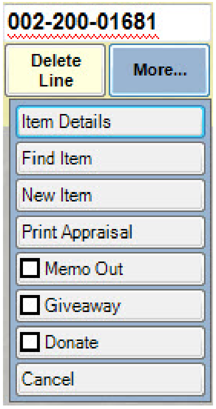
1. Go to **Administrative** ► **System Options** and scroll down to **POS Options**.
2. Enter a value in the **Giveaway Threshold Amount – Percentage** option. This option sets the most a giveaway can be as a percentage of the sale. For example, if this threshold is set at 20 percent, and you sell a $100 item, the value of the giveaway cannot exceed $20. If this threshold is exceeded at point of sale, an override will be required.

3. Also in **System Options** ► **POS**, scroll down to **Return Items when on a Sale with a Giveaway Item** to set the level of security needed to permit giveaway returns.
4. Scroll down to **System Options** ► **Receipt Options** and indicate whether the percent threshold should be shown in **Show Discount Percent Threshold**.
5. Scroll down to **System Options** ► **Wording Options** and indicate how you want giveaways to be described on receipts.

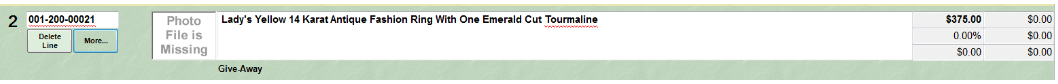
5.3.19.2 Conducting a Promotional Giveaway at Point-of-Sale

To give away an item:

1. Conduct a sale from the **Point of Sale** window as usual.
2. Create sale item lines as usual.
3. To indicate an item is to be given away, in the line item, select **More…**.


002-200-01681

4. From the **More…** sub-menu, select **Giveaway**. The item will appear with its retail cost as usual and the sales price as $0.

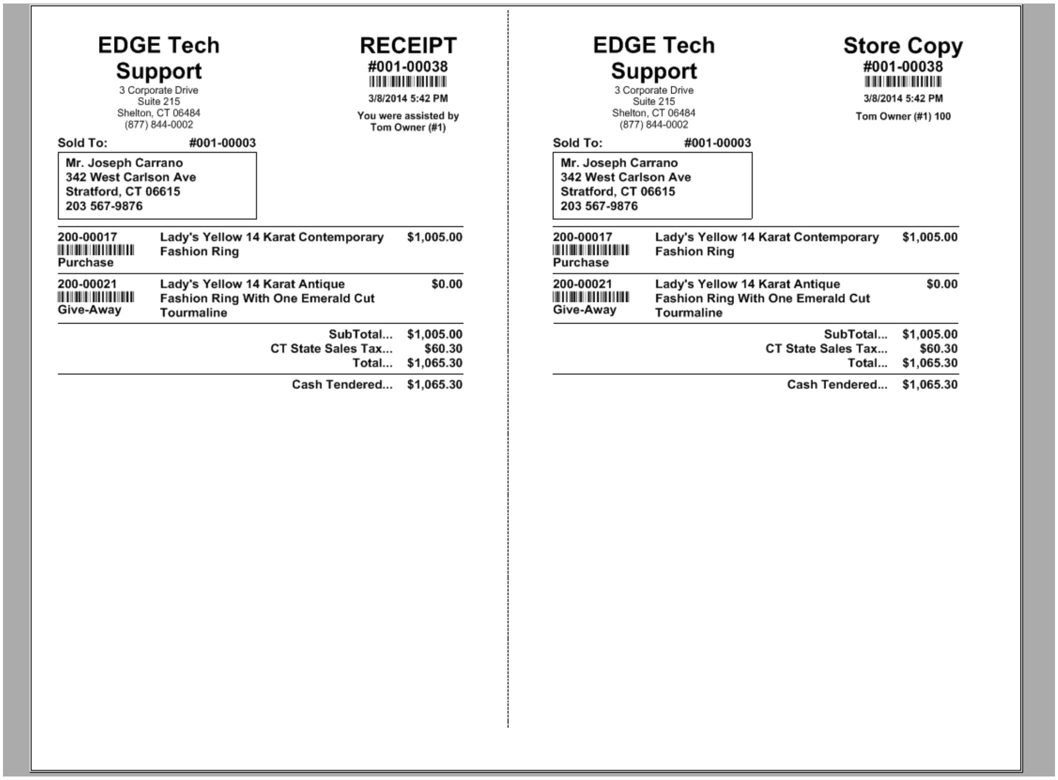

2 001-200-00021

Lady's Yellow 14 Karat Antique Fashion Ring With One Emerald Cut Tourmaline

$375.00	$0.00
0.00%	$0.00
$0.00	$0.00

Give-Away

5. Continue the transaction as usual.
6. Depending on **System Options** settings, the receipt will indicate that the item is a giveaway. This may be pertinent if the item is brought back for return.



EDGE Tech Support
3 Corporate Drive
Suite 215
Shelton, CT 06484
(877) 844-0002

RECEIPT
#001-00038
3/8/2014 5:42 PM
You were assisted by
Tom Owner (#1)

Sold To: #001-00003

Mr. Joseph Carrano
342 West Carlson Ave
Stratford, CT 06615
203 567-9876

200-00017 Purchase	Lady's Yellow 14 Karat Contemporary Fashion Ring	$1,005.00
200-00021 Give-Away	Lady's Yellow 14 Karat Antique Fashion Ring With One Emerald Cut Tourmaline	$0.00
	SubTotal...	$1,005.00
	CT State Sales Tax...	$60.30
	Total...	$1,065.30
	Cash Tendered...	$1,065.30

EDGE Tech Support
3 Corporate Drive
Suite 215
Shelton, CT 06484
(877) 844-0002

Store Copy
#001-00038
3/8/2014 5:42 PM
Tom Owner (#1) 100

Sold To: #001-00003

Mr. Joseph Carrano
342 West Carlson Ave
Stratford, CT 06615
203 567-9876

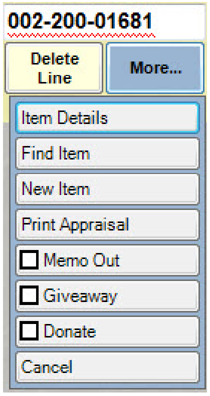
200-00017 Purchase	Lady's Yellow 14 Karat Contemporary Fashion Ring	$1,005.00
200-00021 Give-Away	Lady's Yellow 14 Karat Antique Fashion Ring With One Emerald Cut Tourmaline	$0.00
	SubTotal...	$1,005.00
	CT State Sales Tax...	$60.30
	Total...	$1,065.30
	Cash Tendered...	$1,065.30

- **For reports on promotional giveaway activities, go to Reports ► Inventory ► Giveaways.**
- **For those using integrated accounting with QuickBooks, assign the Giveaway feature to an appropriate expense account with the guidance of your accountant. Accounts are changed in Administrative ►QuickBooks ► Setup QuickBooks Integration ►Accounts.**
- **Giveaways can be put on gift receipts like any other item. The gift receipt list selector DOES show giveaway in the beginning of the description. If you wish to exclude it, there will be no indication that it was free on the receipt.**

5.3.20 Donating an Item

The **Donate Item** feature in The Edge allows you to donate items and track the activity. To donate an item:

1. Conduct a sale from the **Point of Sale** window as usual.
2. Create sale item lines as usual using **Sell Item**.
3. To indicate an item is to be donated, in the line item, select **More…**.



4. From the **More…** sub-menu, select **Donate**.
5. The sale line item will indicate a price of zero.
6. Continue the transaction as usual.

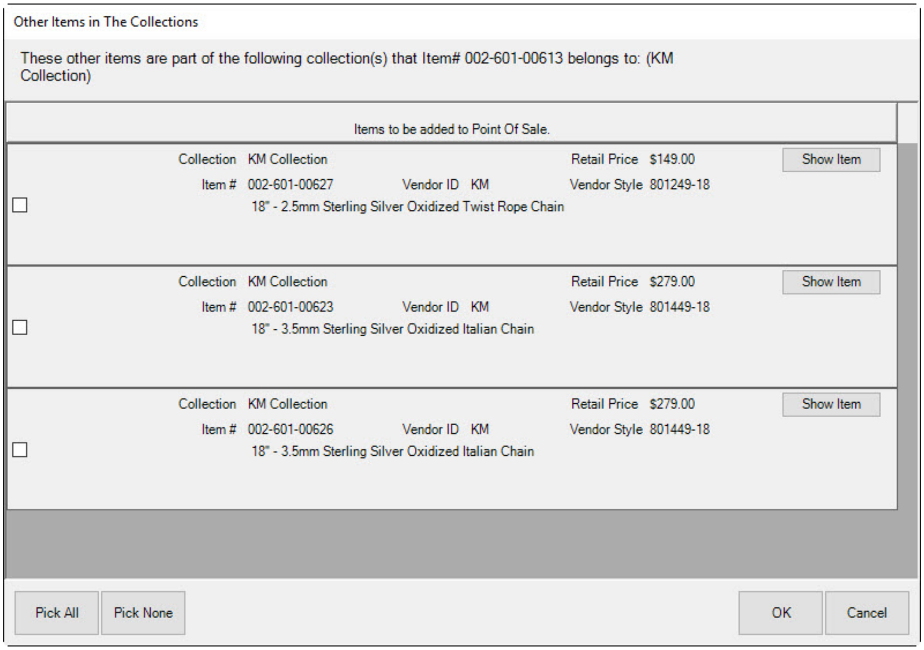
- **The customer must have a designation as being a tax-exempt entity, and there must be a tax ID number on record. To designate a customer as tax exempt, find the customer record, and in the Options tab, check the Tax Exempt option. This cannot be overridden.**
- **Donated items can only be transacted alone or with other items to be donated.**
- **Donations may only be returned by the person to whom they were donated.**

- **For those using integrated accounting with QuickBooks, assign the Donation feature to an appropriate expense account with the guidance of your accountant. Accounts are changed in Administrative ►QuickBooks ► Setup QuickBooks Integration ►Accounts.**
- **A donation may facilitate the need for a gift receipt. The gift receipt list selector does show "donation" in the beginning of the description in case you wish to exclude it.**
- **New item status, donation, can be included or excluded on any inventory or filter using the letter code N.**
- **To see a report of donation activity, go to Reports ► Inventory ► Donations.**

5.3.21 Suggesting from Collections

Collections allow you to do some suggestive selling based on items created as a collection. To see how to create collections and enter items, see the section entitled Collections. To work with collection pop-ups:

1. If an item from a collection is sold at point of sale, a window will appear suggesting other items from the collection.



Other Items in The Collections

These other items are part of the following collection(s) that Item# 002-601-00613 belongs to: (KM Collection)

Items to be added to Point Of Sale.

☐ Collection KM Collection Retail Price $149.00
Item # 002-601-00627 Vendor ID KM Vendor Style 801249-18
18" - 2.5mm Sterling Silver Oxidized Twist Rope Chain

☐ Collection KM Collection Retail Price $279.00
Item # 002-601-00623 Vendor ID KM Vendor Style 801449-18
18" - 3.5mm Sterling Silver Oxidized Italian Chain

☐ Collection KM Collection Retail Price $279.00
Item # 002-601-00626 Vendor ID KM Vendor Style 801449-18
18" - 3.5mm Sterling Silver Oxidized Italian Chain

2. Offer to show the customer the items.
3. If they wish to buy one, select it from the list and select **OK**. A sale line will appear. The **More** button will contain options for viewing the collection.
4. Continue with the sale as usual.

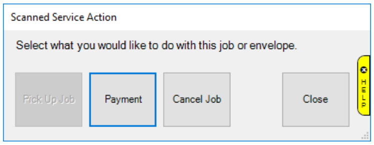
If a customer expresses interest in an item from a collection but does not plan to purchase it right away, you can save it in their Wish List.

5.3.22 Scanned Service Menu

The POS system option **Display_a_Menu_on_Service_Scan** controls the behavior at POS when a service job envelope is scanned.

If this option is set to **False**, scanning a service job will add the job to the sale as a pick up if available (i.e. job marked complete) otherwise it will add the job to the sale for payment.

If this option is set to **True**, scanning a service job will bring up the **Scanned Service Action** menu:



Scanned Service Action

Select what you would like to do with this job or envelope.

5.3.23 OFAC Sanction List Check

Federal law stipulates any retailer that annually purchases $50,000 or more in over-the-counter buys is required to check any sellers' contact information against the Office of Foreign Asset Control (OFAC) sanction list. Learn more on the official OFAC website here.

To facilitate this, The Edge now integrates with the OFAC sanction list and will check customer contact information against the list when a **Trade/Buy** is completed at **POS**. If there are any matches, they will be displayed along with how probable of a match it is.

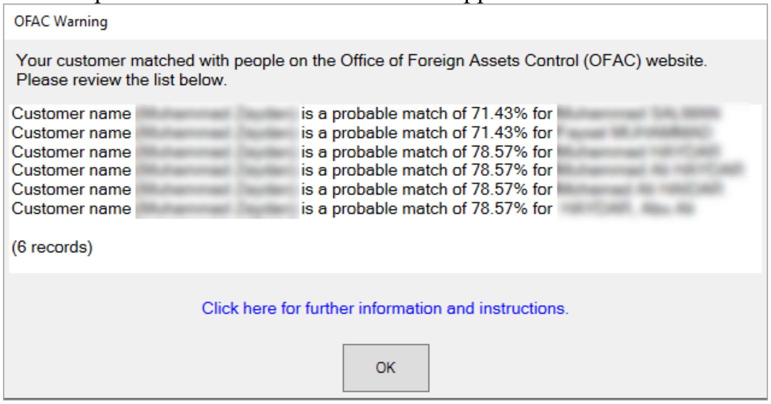
5.3.23.1 Setup

To setup and enable the OFAC sanction list check:

1. Click **Administrative > System Options**.
2. Scroll down to **POS Options**.
3. Find the option **OFAC List URL** and copy/paste in this URL: https://www.treasury.gov/ofac/downloads/sdn.xml
4. Find the option **OFAC Probable Match Threshold** and set this to 0.8.
5. Click **OK** to save your changes.
6. Restart The Edge.

5.3.23.2 Use

Once enabled, the OFAC check will happen when you complete a **POS** transaction that includes a **Trade/Buy**. If there is a potential match this window will appear.



Your customer matched with people on the Office of Foreign Assets Control (OFAC) website.
Please review the list below.

Customer name [redacted] is a probable match of 71.43% for [redacted]
Customer name [redacted] is a probable match of 71.43% for [redacted]
Customer name [redacted] is a probable match of 78.57% for [redacted]
Customer name [redacted] is a probable match of 78.57% for [redacted]
Customer name [redacted] is a probable match of 78.57% for [redacted]
Customer name [redacted] is a probable match of 78.57% for [redacted]

(6 records)

The **OFAC Warning** window will show potential matches along with the probability that they are a true match. This probability is based on comparing both the name and address.
If you believe the match may be valid:

1. Navigate to https://sanctionssearch.ofac.treas.gov/ and run the search with the customer's name and address to verify the match is real.

2. Validate the customer information is accurate.
3. Follow the steps outlined here:
   https://www.treasury.gov/resource-center/faqs/sanctions/pages/faq_compliance.aspx#start

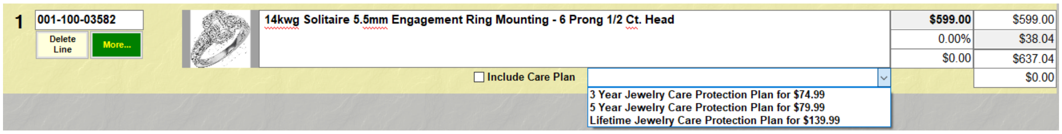
5.4 Working with Care Plans at POS

We recommend that your associates introduce the care plan during the sales process, when showing the piece and talking about the benefits and pricing before getting to point of sale. That way it's not sold as an add-on or interpreted as an upsell. There is an option in the Categories Tags tab to add the care plan price or price plus item retail to item tags.

To work with product care programs at POS:

1. When making a sale at POS, after you have entered the associate, found the customer, scanned the item, you'll see that each sale line contains an option to add the care program.
2. If your license allows more than one kind of plan, use the drop-down menu to see care plan available. If not, the default will show.

    a. Multiple Plans Available



1 001-100-03582

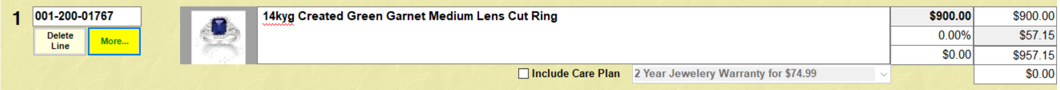
14kwg Solitaire 5.5mm Engagement Ring Mounting - 6 Prong 1/2 Ct. Head

$599.00 | $599.00
0.00% | $38.04
$0.00 | $637.04
$0.00

☐ Include Care Plan

3 Year Jewelry Care Protection Plan for $74.99
5 Year Jewelry Care Protection Plan for $79.99
Lifetime Jewelry Care Protection Plan for $139.99

    b. Single Plan Available



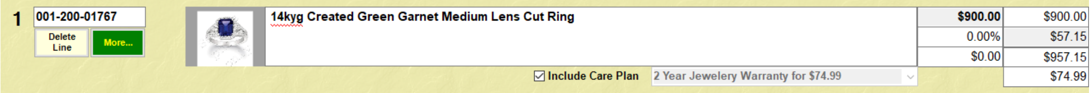
1 001-200-01767

14kyg Created Green Garnet Medium Lens Cut Ring

$900.00 | $900.00
0.00% | $57.15
$0.00 | $957.15
$0.00

☐ Include Care Plan 2 Year Jewelery Warranty for $74.99

3. Explain the care program to your customer and ask if they would like to purchase it; you can refer to the drop-down menu to offer various programs and prices.
4. When the customer agrees, select the appropriate plan and the **Include Care Plan** checkbox.
5. The care plan price will appear in the sale line below the final item price. Change it if desired.



1 001-200-01767

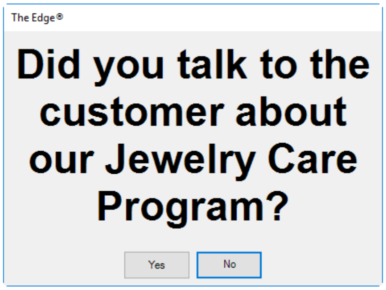
14kyg Created Green Garnet Medium Lens Cut Ring

$900.00 | $900.00
0.00% | $57.15
$0.00 | $957.15
$74.99

☑ Include Care Plan 2 Year Jewelery Warranty for $74.99

- **If you're selling more than one of the same quantity, but the customer only wants protection on one or some of them, sell the items in separate sale lines and indicate the care plan in only the desired sale line.**
- **If the customer wants to add the plan after the sale is complete, return the item and resell it with the plan.**

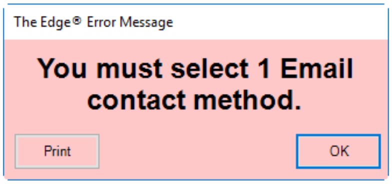
6. The transaction total will include the fee and, if applicable, sales tax on it. Talk with your accountant and see the section entitled Setup Tax Definitions if your tax jurisdiction requires tax on such fees.
7. Complete the sale as usual.
8. Depending on your **System Options**, if you select **Done** without checking the **Include Care Plan** checkbox, you will be prompted to confirm that you talked with the customer about it.



The Edge®

Did you talk to the customer about our Jewelry Care Program?

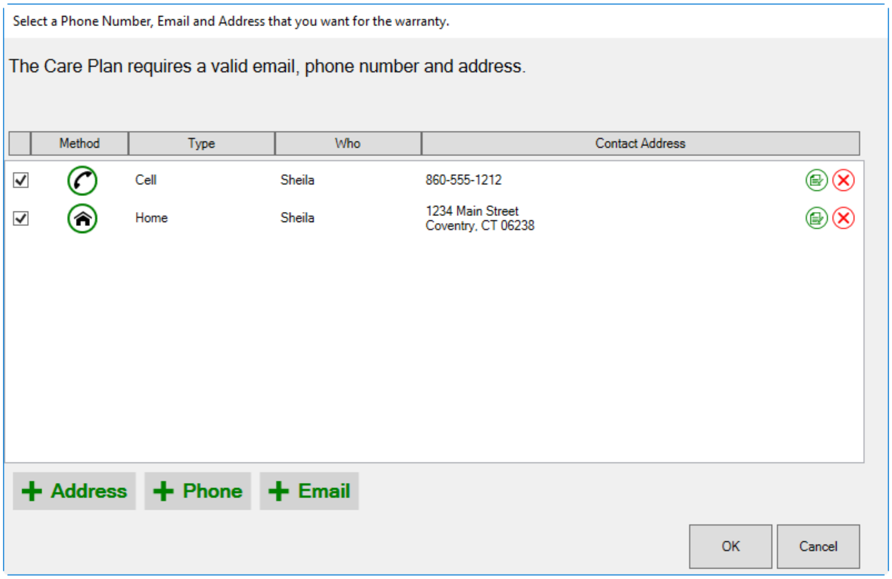
9. Select **Yes** or **No** and discuss the plan with the customer.
10. Continue with the sale.
11. When you select **Done**, if the customer does not have an address, phone number, and email address on record, you will be prompted to provide this information:



The Edge® Error Message

You must select 1 Email contact method.

a. Select **OK** to see the **Select a Phone Number, Email and Address that you want for the warranty** window.

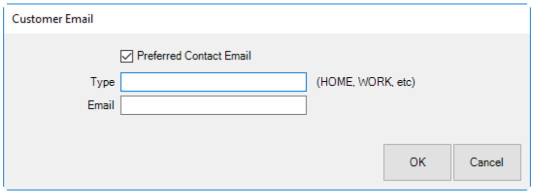


Select a Phone Number, Email and Address that you want for the warranty.

The Care Plan requires a valid email, phone number and address.

	Method	Type	Who	Contact Address
☑	☎	Cell	Sheila	860-555-1212
☑		Home	Sheila	1234 Main Street Coventry, CT 06238

b. Select + **Address**, + **Phone**, or +**Email** as requested and enter the desired information.



Customer Email

☑ Preferred Contact Email

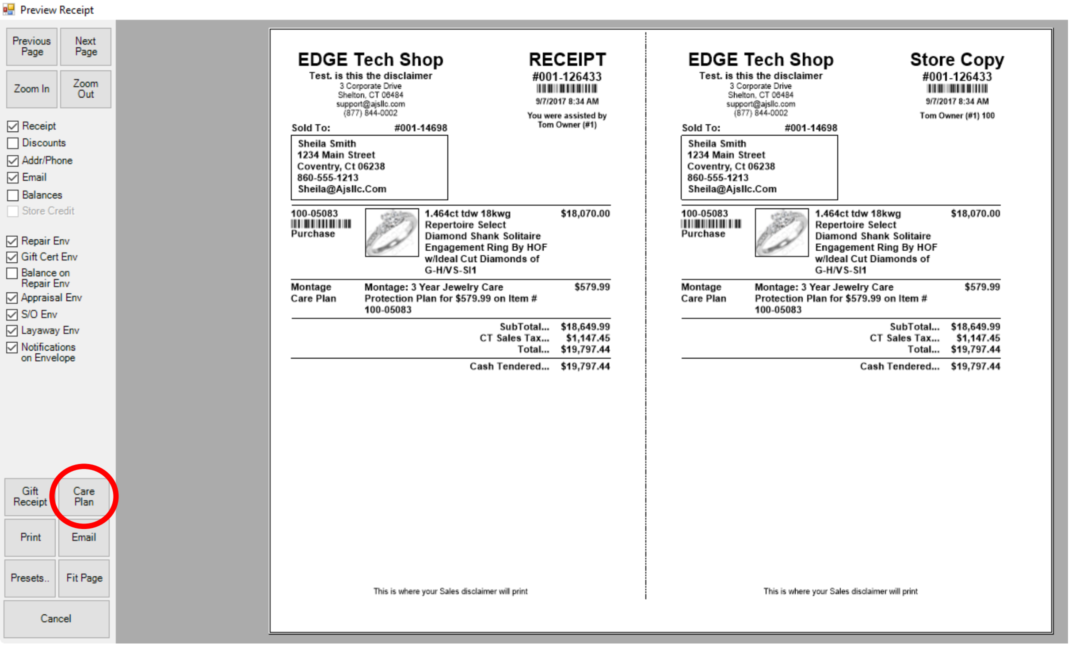
Type (HOME, WORK, etc)

Email

c. Select **OK**.

d. Select **Done** again to complete the sale.

12. The receipt will show the plan.



EDGE Tech Shop
Test. is this the disclaimer
3 Corporate Drive
Shelton, CT 06484
support@ajsllc.com
(877) 844-0002

RECEIPT
#001-126433
9/7/2017 8:34 AM
You were assisted by
Tom Owner (#1)

Sold To: #001-14698

Sheila Smith
1234 Main Street
Coventry, Ct 06238
860-555-1213
Sheila@Ajsllc.Com

100-05083 Purchase	1.464ct tdw 18kwg Repertoire Select Diamond Shank Solitaire Engagement Ring By HOF w/Ideal Cut Diamonds of G-H/VS-SI1	$18,070.00
Montage Care Plan	Montage: 3 Year Jewelry Care Protection Plan for $579.99 on Item # 100-05083	$579.99

SubTotal... $18,649.99
CT Sales Tax... $1,147.45
Total... $19,797.44

Cash Tendered... $19,797.44

This is where your Sales disclaimer will print

EDGE Tech Shop
Test. is this the disclaimer
3 Corporate Drive
Shelton, CT 06484
support@ajsllc.com
(877) 844-0002

Store Copy
#001-126433
9/7/2017 8:34 AM
Tom Owner (#1) 100

Sold To: #001-14698

Sheila Smith
1234 Main Street
Coventry, Ct 06238
860-555-1213
Sheila@Ajsllc.Com

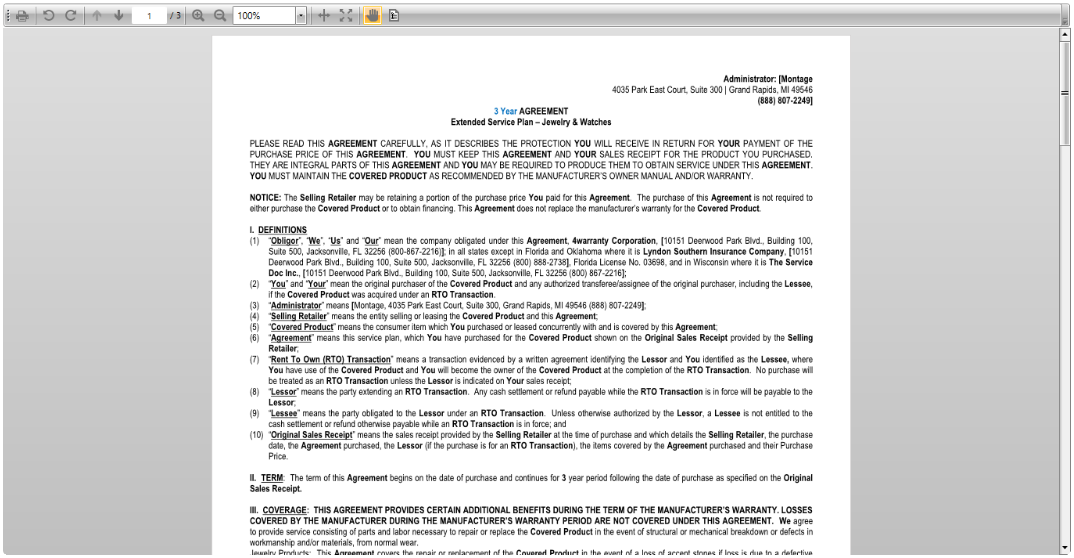
100-05083 Purchase 1.464ct tdw 18kwg Repertoire Select Diamond Shank Solitaire Engagement Ring By HOF w/Ideal Cut Diamonds of G-H/VS-SI1 $18,070.00
Montage Care Plan Montage: 3 Year Jewelry Care Protection Plan for $579.99 on Item # 100-05083 $579.99

SubTotal... $18,649.99
CT Sales Tax... $1,147.45
Total... $19,797.44

Cash Tendered... $19,797.44

This is where your Sales disclaimer will print

13. Some care plan providers offer an email or printable version of the term. To view and print the care plan terms, select **Care Plan** from the receipt window. If the receipt is to be emailed, the terms will go out with the email. You can also go to the shared folder (e.g., `C:\ProgramData\AJSLLC\edge\CarePlanTerms`) and print them out ahead of time.



Administrator: [Montage
4035 Park East Court, Suite 300 | Grand Rapids, MI 49546
(888) 807-2249]

3 Year AGREEMENT
Extended Service Plan – Jewelry & Watches

PLEASE READ THIS **AGREEMENT** CAREFULLY, AS IT DESCRIBES THE PROTECTION **YOU** WILL RECEIVE IN RETURN FOR **YOUR** PAYMENT OF THE PURCHASE PRICE OF THIS **AGREEMENT**. **YOU** MUST KEEP THIS **AGREEMENT** AND **YOUR** SALES RECEIPT FOR THE PRODUCT YOU PURCHASED. THEY ARE INTEGRAL PARTS OF THIS **AGREEMENT** AND **YOU** MAY BE REQUIRED TO PRODUCE THEM TO OBTAIN SERVICE UNDER THIS **AGREEMENT**. **YOU** MUST MAINTAIN THE **COVERED PRODUCT** AS RECOMMENDED BY THE MANUFACTURER'S OWNER MANUAL AND/OR WARRANTY.

NOTICE: The **Selling Retailer** may be retaining a portion of the purchase price **You** paid for this **Agreement**. The purchase of this **Agreement** is not required to either purchase the **Covered Product** or to obtain financing. This **Agreement** does not replace the manufacturer's warranty for the **Covered Product**.

I. DEFINITIONS

(1) "**Obligor**", "**We**", "**Us**" and "**Our**" mean the company obligated under this **Agreement**, **4warranty Corporation**, [10151 Deerwood Park Blvd., Building 100, Suite 500, Jacksonville, FL 32256 (800-867-2216)]; in all states except in Florida and Oklahoma where it is **Lyndon Southern Insurance Company**, [10151 Deerwood Park Blvd., Building 100, Suite 500, Jacksonville, FL 32256 (800) 888-2738], Florida License No. 03698, and in Wisconsin where it is **The Service Doc Inc.**, [10151 Deerwood Park Blvd., Building 100, Suite 500, Jacksonville, FL 32256 (800) 867-2216];
(2) "**You**" and "**Your**" mean the original purchaser of the **Covered Product** and any authorized transferee/assignee of the original purchaser, including the **Lessee**, if the **Covered Product** was acquired under an **RTO Transaction**.
(3) "**Administrator**" means [Montage, 4035 Park East Court, Suite 300, Grand Rapids, MI 49546 (888) 807-2249];
(4) "**Selling Retailer**" means the entity selling or leasing the **Covered Product** and this **Agreement**;
(5) "**Covered Product**" means the consumer item which **You** purchased or leased concurrently with and is covered by this **Agreement**;
(6) "**Agreement**" means this service plan, which **You** have purchased for the **Covered Product** shown on the **Original Sales Receipt** provided by the **Selling Retailer**;
(7) "**Rent To Own (RTO) Transaction**" means a transaction evidenced by a written agreement identifying the **Lessor** and **You** identified as the **Lessee,** where **You** have use of the **Covered Product** and **You** will become the owner of the **Covered Product** at the completion of the **RTO Transaction**. No purchase will be treated as an **RTO Transaction** unless the **Lessor** is indicated on **Your** sales receipt;
(8) "**Lessor**" means the party extending an **RTO Transaction**. Any cash settlement or refund payable while the **RTO Transaction** is in force will be payable to the **Lessor**;
(9) "**Lessee**" means the party obligated to the **Lessor** under an **RTO Transaction**. Unless otherwise authorized by the **Lessor**, a **Lessee** is not entitled to the cash settlement or refund otherwise payable while an **RTO Transaction** is in force; and
(10) "**Original Sales Receipt**" means the sales receipt provided by the **Selling Retailer** at the time of purchase and which details the **Selling Retailer**, the purchase date, the **Agreement** purchased, the **Lessor** (if the purchase is for an **RTO Transaction**), the items covered by the **Agreement** purchased and their Purchase Price.

II. TERM: The term of this **Agreement** begins on the date of purchase and continues for **3** year period following the date of purchase as specified on the **Original Sales Receipt.**

III. COVERAGE: THIS AGREEMENT PROVIDES CERTAIN ADDITIONAL BENEFITS DURING THE TERM OF THE MANUFACTURER'S WARRANTY. LOSSES COVERED BY THE MANUFACTURER DURING THE MANUFACTURER'S WARRANTY PERIOD ARE NOT COVERED UNDER THIS AGREEMENT. We agree to provide service consisting of parts and labor necessary to repair or replace the **Covered Product** in the event of structural or mechanical breakdown or defects in workmanship and/or materials, from normal wear.

Jewelry Products: This **Agreement** covers the repair or replacement of the **Covered Product** in the event of a loss of accent stones if loss is due to a defective

Important!

- **Your sales data should be reported to your care plan provider on a daily basis using the process described in the section entitled Uploading Transactions and you will be billed accordingly. Be sure this data matches that in the Care Plan Report.**
- **There is no sales tax shown on the sale line in POS, but it will be added to the total and on the receipt.**

5.5 Tender Options

The **Tender Options** section of the **Point of Sale** window allows you to select one or more types of tender and complete a transaction. To process payment of an item or service, select a payment type from the options listed on the bottom left corner of the window.

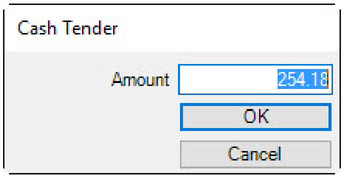
When making a sale using The Edge, the subtotal and total will automatically update as items are added and removed. Likewise, the **Tendered** and **Due** category will update as payments are made.

Multiple tender options can be used on the same transaction, even multiple tenders of the same type (e.g., two different Visa cards). Further, when the Tender window comes up, it will default to the remaining amount due.

5.5.1 Cash

To receive a cash payment:

1. Select **Cash**. The **Cash Tender** window will appear. The dollar amount required to satisfy the remaining balance of the purchase will automatically appear in the **Amount** field.



Cash Tender

Amount: 254.18

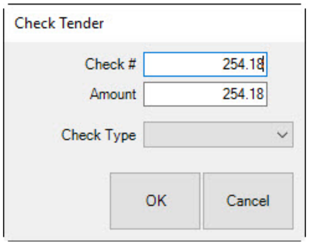
2. Select **OK** if this is the amount to be paid in full or, if accepting a partial payment, manually enter the amount to be paid.
3. Select **OK**.

To process change, select Cash once and enter the amount given. Select OK. Select Cash again, and select OK, and the change due back will appear. The receipt will reflect this change.

5.5.2 Check

To accept a payment by check:

1. Select **Check**. The **Check Tender** window will appear.



Check Tender

Check # 254.18

Amount 254.18

Check Type

2. Enter the check number in the **Check #** field. The dollar amount required to satisfy the remaining balance of the purchase will automatically appear in the **Amount** field.
3. Select **OK** if this is the amount to be paid in full or, if accepting a partial payment, manually enter the amount to be paid.
4. Select a check type from the **Check Type** drop-down menu.
5. Select **OK**.

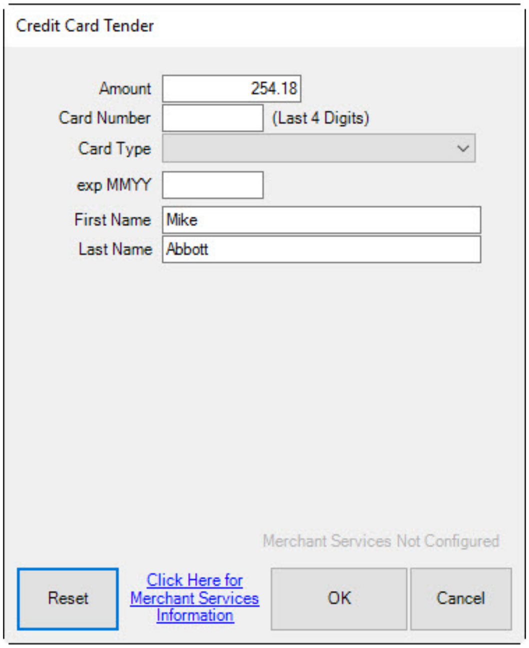
5.5.3 Credit Card

Credit card processing varies slightly based on your credit card processing company and the type of card reader. The following video tutorials for taking credit cards at POS are available:

Credit Card Processing with the PAX S300	http://www.screencast.com/t/9BETcnjM
Credit Card Processing with the VX805	http://www.screencast.com/t/RTr01QS3b4

Generally, to accept a payment by credit card, use the following process allowing for those variances:

1. Select **Credit Card**. The **Credit Card Tender** window will appear.



Credit Card Tender

Amount 254.18

Card Number (Last 4 Digits)

Card Type

exp MMYY

First Name Mike

Last Name Abbott

Merchant Services Not Configured

Fields and options in the **Credit Card Tender** window vary by system type, but might include:

Amount	The amount to be charged to the card. It will default to the sale amount.
Card Number	The credit card number.
Card Type	The kind of credit card: Visa, MasterCard, etc.
Exp MMDD	The expiration date of the card.
Name on Card	The name of the person on the credit card account.
Auth Code	The authorization code returned by the processing company.
Voice Authorized/Forced	Indicates that authorization was obtained on the phone or forced by the associate.
Reset	Allows you to clear the fields.
Click Here…	The Edge Support Team cannot assist with credit card processing issues. This link to the credit card processor for assistance.
OK	Allows you to continue with charging the sale to the card.
Cancel	Cancels the credit card transaction.

Most of these fields will automatically populate when you slide or insert the card through the reader.

2. The dollar amount required to satisfy the remaining balance of the purchase will automatically appear in the **Amount** field. Change the amount if necessary.
3. Check the amount due and select **OK**. That tells The Edge to start interaction with the card reader. The reader will not begin until **OK** is pushed.
4. When prompted to do so, swipe the credit card. For cards with an EMV chip, insert into it the chip reader. Alternatively, select the **Manual Entry** tab and process as described below.
5. If it was a debit transaction, when prompted, allow the customer to enter the PIN.
6. Press **OK** on the keypad. The processor will obtain the card information and return to The Edge **Credit Card** window with the authorization code.
7. Verify that tender as shown in the **Tender** area is complete.
8. Select **OK.**

Credit card choices are defined by a system list. See the section entitled Lists for information on editing this list.

If you must record the credit card transaction manually:

1. Conduct the sale as you normally would.
2. Select **Credit Card** from the tender area.
3. Select the **Manual Entry** tab if the processor has one. Otherwise, go to step 5.
4. Select **OK**; this is important to enable the entry fields and tell The Edge to start interacting with the card reader.
5. Use the keypad on the card reader to enter the account number, month and year of expiration, the customer's ZIP code, and the security code from the card. The reader may ask if the card has an EMV chip; if so, answer `Yes`.

When a card number is hand-entered and the terminal device prompts for the ZIP code, be sure to enter the customer's actual billing ZIP code. Entering an incorrect ZIP code or bypassing the ZIP code field could result in a decline or higher fees.

6. Select **OK** on the keypad.
7. The Edge will process the data, populating the fields in the **Credit Card** window.
8. When it is complete, finish the sale by checking the tender amount and completing the sale.

For some devices, manual entry is similar; you will need to use The Edge **Credit Card** window to enter the data.

For voice authorization:

1. Conduct the sale as you normally would.
2. Select **Credit Card** from the tender area.
3. Check the Voice Authorization checkbox.

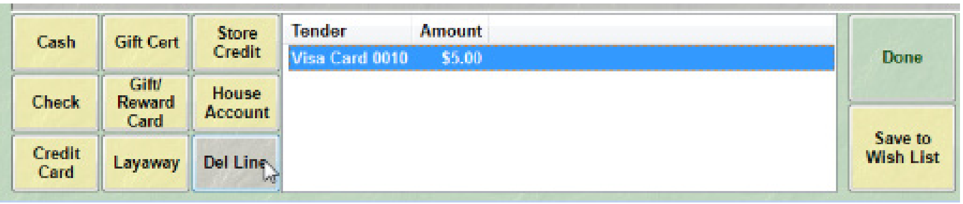
If you are working offline from your credit card processor:

1. Select the **Offline** tab.
2. Complete the remaining fields manually.
3. Select **OK**. This will record the sale in The Edge only.
4. Make arrangements to upload the transaction data to your credit card processor.

5.5.3.1 Cancelling a Credit Card Transaction before Completing the Sale

In The Edge, a credit card transaction gets sent to the processor when it is approved, before you select Done to complete the transaction. To cancel it:

1. Before selecting **Done**, select the tender line from the tender area of the **Point of Sale** window.



2. Select **Del Line**. You'll be prompted to confirm the action.
3. Select **Yes**. The tender line will be deleted.
4. Select another tender method and complete the transaction.
5. Be sure to provide the receipt to the customer reflecting the cancelled charge.

If you need to cancel the whole transaction after the credit card has been processed, but before you complete the sale:

1. Void the payment as described above.
2. Delete all the sale lines or use the **Start Over** option.
3. Complete the transaction by clicking the **Done** button to view and print the receipt.

5.5.3.2 Voiding a Credit Card Transaction After Completing the Sale

If you must correct an error, and if settlement has not occurred, you can void a sale, although we recommend that you avoid this wherever possible.

To void a credit card transaction:

1. Locate the sale from the **Point of Sale** window using the **Receipts** feature or from **Customer ► Sales ► Find**.
2. Open the sale record.
3. From the **Supervisor** menu, select **Void Sale**.
4. You may be prompted to swipe, insert, or tap the credit card.
5. Complete the void as usual.
6. Be sure to provide a receipt to the customer.

Debit transactions cannot be voided.

Voiding credit card transactions, or any transaction, is not recommended. It is better for record-keeping purposes to reverse the transaction. Only void a transaction when there is an actual error. Finally, if there are technical issues precluding proper processing, do not void the transaction. Resolve the transaction with the credit card processor and then reverse the transaction. If technical issues remain, the reversal may require assistance from the credit card processor as well.

For more about credit card processing, see our video tutorial at:

Credit Card Processing with the PAX S300	http://www.screencast.com/t/9BETcnjM
Credit Card Processing with the VX805	http://www.screencast.com/t/RTr01QS3b4

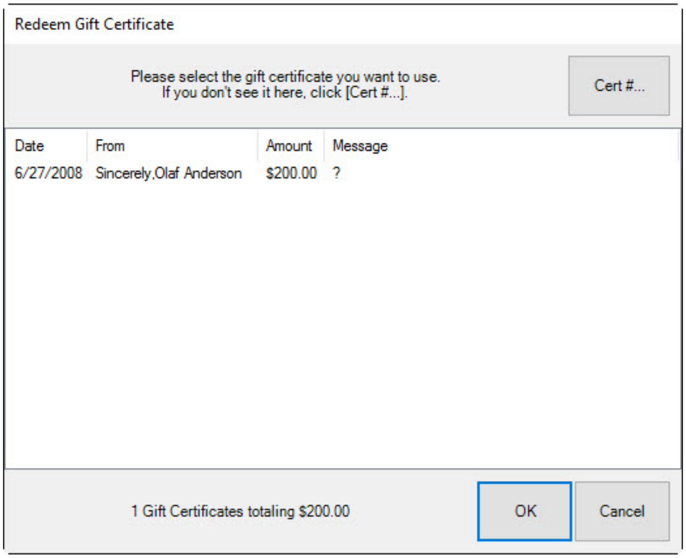
For more about credit troubleshooting, see the section entitled Credit Cards.

5.5.4 Gift Certificate

If a customer has a gift certificate outstanding, the **Gift Certificate** payment option will be green. However, if it is not, the customer may still have a valid gift certificate to present for payment. You may or may not feel the need to match up the customer with the gift certificate.

To accept payment by gift certificate:

1. Scan the gift certificate barcode. If you don’t have a barcode scanner, or if the barcode is obscured, select **Gift Cert**. The **Redeem Gift Certificate** window will appear.

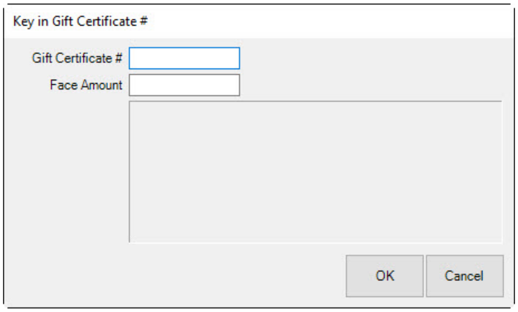

Redeem Gift Certificate

Please select the gift certificate you want to use.
If you don't see it here, click [Cert #...].

Date	From	Amount	Message
6/27/2008	Sincerely,Olaf Anderson	$200.00	?

1 Gift Certificates totaling $200.00

2. Select the gift certificate to be used by selecting it from the list shown or, if the certificate is not listed, select **Cert#...**. The **Key in Gift Certificate #** window will appear.

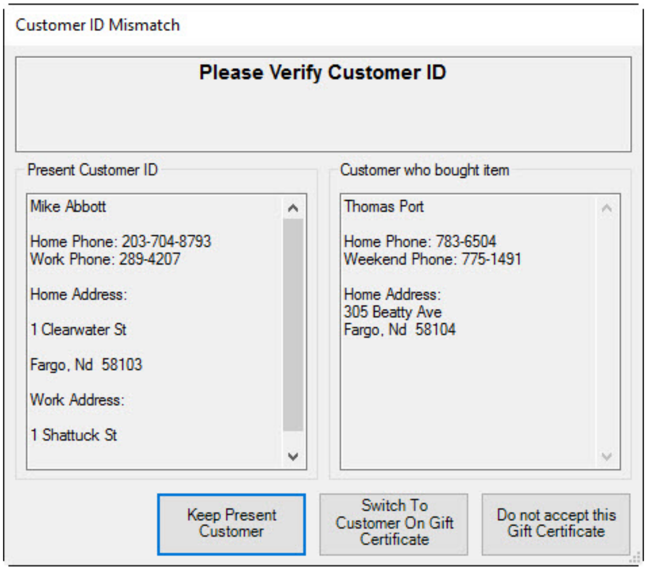

Key in Gift Certificate #

Gift Certificate #
Face Amount

3. Enter the gift certificate number and the full face amount in the appropriate fields.
4. Select **OK**. The value of the certificate should appear. If the gift certificate is not found, a window saying that the gift certificate is not on file will appear and ask if you want to use it anyway. To do so, enter your associate number and password. This is useful for accepting gift certificates not issued through The Edge.

If the recipient of the gift certificate does not match the user:

1. From the **Key in Gift Certificate #** window, enter the certificate number. The **Customer ID Mismatch** window will appear.



Mike Abbott

Home Phone: 203-704-8793
Work Phone: 289-4207

Home Address:

1 Clearwater St

Fargo, Nd 58103

Work Address:

1 Shattuck St

Thomas Port

Home Phone: 783-6504
Weekend Phone: 775-1491

Home Address:
305 Beatty Ave
Fargo, Nd 58104

In the **Present Customer ID** field, the person presenting the gift certificate for use will appear. In the **Customer Who Bought the Item** field, the person for whom it was purchased will appear.

2. Based on the data, select an option:

Keep the Present Customer	The Edge will accept the gift certificate using the presenting customer.
Switch to Customer on Gift Certificate	The Edge will repopulate the **Customer** field on the **Point of Sale** window to be the person for whom the gift certificate was bought.
Do Not Accept This Gift Certificate	The Edge will not apply any gift certificate and will await new tender instructions.

3. Continue with the sale as usual.

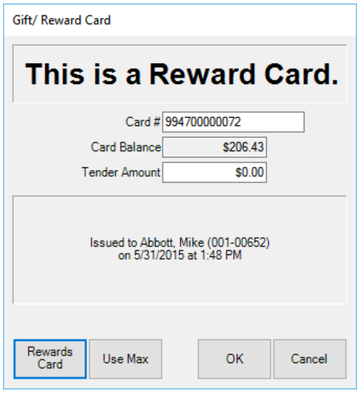
Gift certificates are always applied in full to a transaction. If a gift certificate is larger than the current purchase, you should issue a new gift certificate for the remainder. Gift certificates are never partially used.

5.5.5 Rewards/Tender Cards

While payment by rewards card can be taken for pickup, The Edge does not allow rewards cards to be used for deposits and interim payments. However, if deposits or interim payments were made in cash, The Edge does allow for final payment by rewards card and refund of the cash.

To accept a rewards card toward a purchase or refill a tender card:

1. Scan the reward card’s barcode. The **Tender Card** window will appear with the card number and balance.


Gift/ Reward Card

This is a Reward Card.

Card # 994700000072
Card Balance $206.43
Tender Amount $0.00

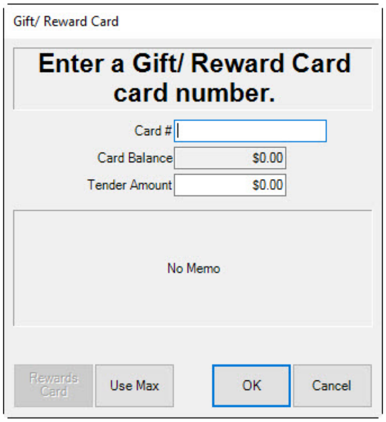
Issued to Abbott, Mike (001-00652)
on 5/31/2015 at 1:48 PM

In this example, the purchase price was deducted from the card balance and the remaining amount was left on the card for future use.

2. Select **OK**.

If the card number must be entered manually:

1. Select **Tender/Reward Card**. The **Tender/Reward Card** window will appear.


Gift/ Reward Card

Enter a Gift/ Reward Card card number.

Card #
Card Balance $0.00
Tender Amount $0.00

No Memo

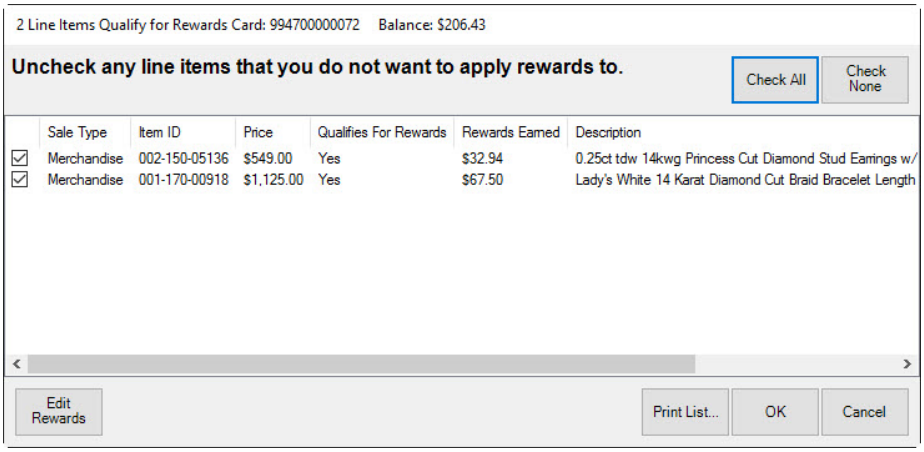
2. Enter the amount to be tendered in the **Tender Amount** field or select **Use Max** to use the remaining balance of the card towards a purchase.
3. Select **OK** if this is the amount to be paid in full or, if accepting a partial payment, manually enter the amount to be paid.

There is far more detail about working with reward and referral cards in the section entitled Rewards under Administrative.

5.5.5.1 Applying Earnings to Rewards Cards

To indicate that some items in the sale should or should not apply to rewards earnings:

1. Conduct the sale as usual.
2. Before selecting a tender option, select the **Rewards** button that appears near the customer information box.
3. A dialog will appear indicating, based on rewards settings, the items available to earn credit.



2 Line Items Qualify for Rewards Card: 994700000072 Balance: $206.43

Uncheck any line items that you do not want to apply rewards to.

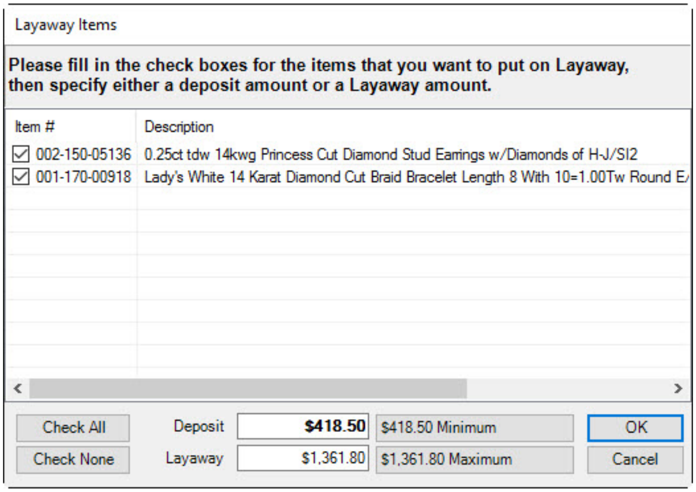
	Sale Type	Item ID	Price	Qualifies For Rewards	Rewards Earned	Description
☑	Merchandise	002-150-05136	$549.00	Yes	$32.94	0.25ct tdw 14kwg Princess Cut Diamond Stud Earrings w/
☑	Merchandise	001-170-00918	$1,125.00	Yes	$67.50	Lady's White 14 Karat Diamond Cut Braid Bracelet Length

4. To disallow credit from an item, uncheck it. To accept the items to apply, leave them checked.
5. Select **OK**.

5.5.6 Layaway

To put an item on layaway:

1. Select **Layaway**. The **Layaway Items** window will appear.



Layaway Items

Please fill in the check boxes for the items that you want to put on Layaway, then specify either a deposit amount or a Layaway amount.

Item #	Description
☑ 002-150-05136	0.25ct tdw 14kwg Princess Cut Diamond Stud Earrings w/Diamonds of H-J/SI2
☑ 001-170-00918	Lady's White 14 Karat Diamond Cut Braid Bracelet Length 8 With 10=1.00Tw Round E/

Deposit: **$418.50** — $418.50 Minimum

Layaway: $1,361.80 — $1,361.80 Maximum

2. Select the items to be put on layaway. If all items are to be put on layaway, select **Check All** from the bottom left corner of the window.
3. Enter the amount put on deposit or the amount to be put on layaway; when you complete one of these fields, the other will be calculated. Alternatively, select the minimum or maximum values to enter them in the deposit and layaway fields.

The minimum deposit and maximum layaway amounts to be accepted are listed to the right of the Deposit and Layaway fields as defined by System Options.

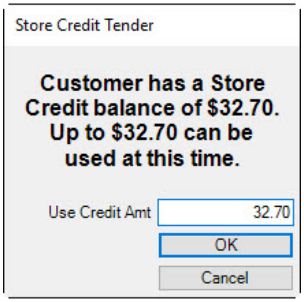
4. Select **OK**.

When using a trade-in as part of the deposit towards a layaway, it is important to include the trade-in amount in the amount defined as the deposit on that layaway. For instance, if a customer put an item on layaway for $1,000 and gave you $200 cash and a trade-in valued at $100, you should enter $300 as the deposit amount on the layaway. This also applies to special orders and repairs.

5.5.7 Store Credit/Credit Memo

Once a customer is identified, if he has store credit on file, the **Store Credit** button will be green. Credit memos are blended for couples and can be used by either party. To accept a credit memo as payment:

1. Select **Store Credit** from the **Point of Sale** window. The **Store Credit Tender** window will appear.



Customer has a Store Credit balance of $32.70. Up to $32.70 can be used at this time.

Use Credit Amt 32.70

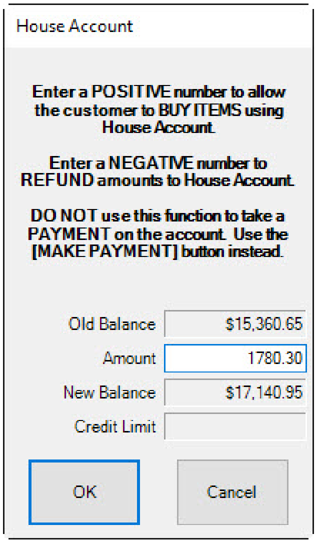
2. The amount of the credit up to the amount of the sale will be the default amount applied. Accept the default value or change the amount to be used from this credit memo by entering a different amount in the **Use Credit Amt** field.
3. Select **OK**.

- **To issue a store credit, select the Store Credit option while an amount is due back to the customer. The appropriate negative amount will be pre-filled.**
- **Remember that earned referral rewards post to the referring customer's credit memo account.**
- **The label on this button can be changed in System Options.**

5.5.8 House Account

To accept store charge as payment:

1. Select **House Account**. The **House Account** window will appear.



Enter a POSITIVE number to allow the customer to BUY ITEMS using House Account.

Enter a NEGATIVE number to REFUND amounts to House Account.

DO NOT use this function to take a PAYMENT on the account. Use the [MAKE PAYMENT] button instead.

Old Balance $15,360.65
Amount 1780.30
New Balance $17,140.95
Credit Limit

2. The default amount to be charged to the account is the amount due. If you wish to change that, enter the new amount in the **Amount** field.
3. To refund an amount to a store charge card, enter a negative amount in the **Amount** field.
4. Select **OK** if this is the amount to be paid in full or, if accepting a partial payment, manually enter the amount to be paid.
5. Select **OK**.

Customer house accounts are disabled for all customers by default. You can enable them on an individual basis or change the System Options to enable them for all customers by default.

5.6 Wish Lists

Wish lists allow you to save items and ideas in a customer record for future reference. They can be saved as reminders of what your customer wants to get or your customer can have the list sent to someone else, which is done through The Edge's notifications and email features.

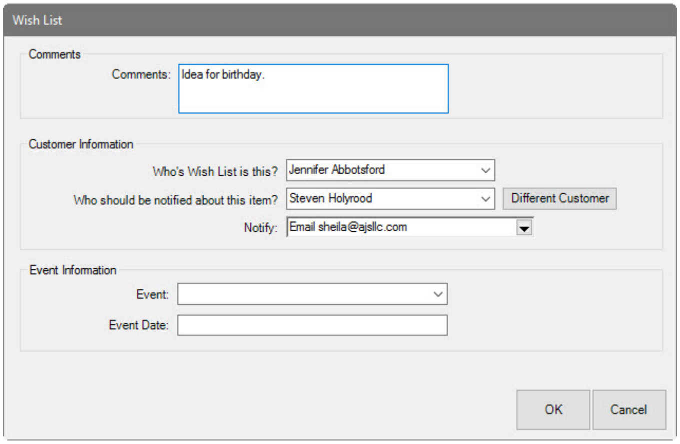
5.6.1 Entering Wish List Items

There are two ways to enter items into a customer's wish list: using **Save to Wish List**, which is most efficient for quickly scanning in-stock items and using **Wish List Entry Mode**, which allows for both stock and non-stock wish list entry.

5.6.1.1 Entering Wish List Items Using Save to Wish List

First, from the **Point of Sale** window:

1. Find the customer record.
2. Enter the item to be added as if it were a sale.
3. Instead of taking payment and completing the sale, select **Save to Wish List** from the bottom right corner of the **Point of Sale** window. The **Wish List** window will appear.



Comments: Idea for birthday.

Who's Wish List is this? Jennifer Abbotsford

Who should be notified about this item? Steven Holyrood

Notify: Email sheila@ajsllc.com

Event:

Event Date:

Fields and options in the **Wish List** window include:

Comments	Allows you to add information or instructions for the wish.
Whose wish list is this?	Indicates who wishes for the item. The default is always SELF.
Who should be notified about this item?	Indicates who should be notified about the item. The default is the spouse/partner of the person whose wish list you are entering. Click **Different Customer** to notify a different customer altogether.

Notify	Allows you to pick from the existing contact information of the person to notify about where send the notification. You can also add contact information. For more information, see the section entitled Notifications. Selecting **Add** allows you to specify a new method of contact, which will be saved on the customer account record.
Event	Indicates for what occasion the item might be a gift.
Event Date	Indicates the date of the occasion. If the event is an anniversary or birthday, it will be stored in the customer's record and can be queried for many marketing reasons.

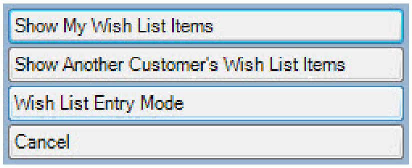
4. Complete the fields as desired and select **OK**. The item will be added to the customer's wish list.

When you select Save to Wish List, you will be prompted to remove any sale line entry in the Point of Sale window that is inappropriate for a wish list.

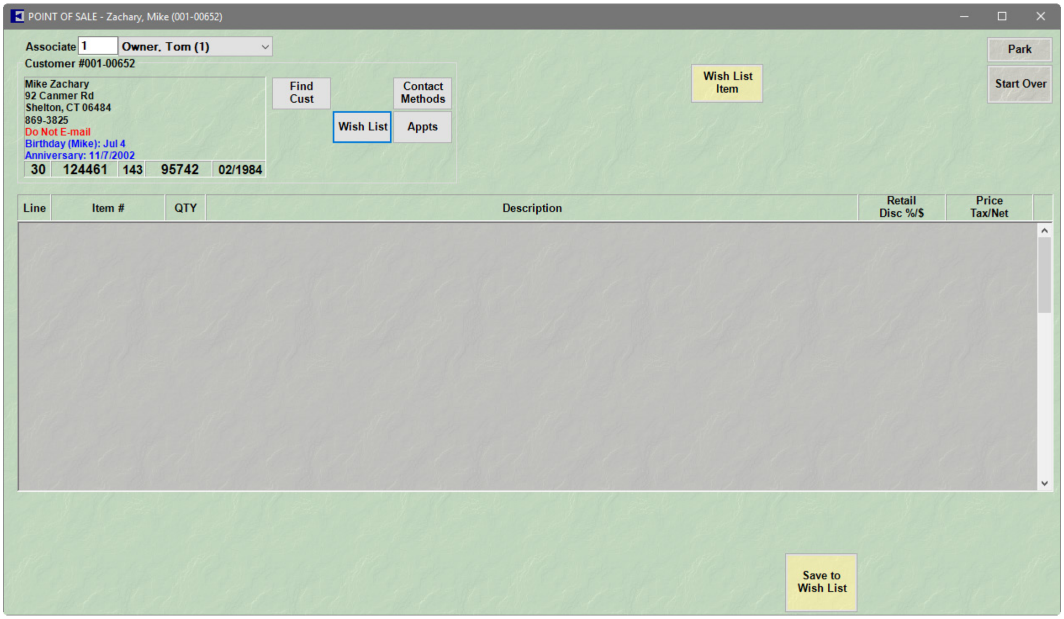
5.6.1.2 *Entering Wish List Items Using Wish List Entry Mode*

Wish List Entry Mode offers a view of the **Point of Sale** window that allows for much more wish list flexibility. It does not require that the item be in stock. In fact, wish list items can be rough ideas or descriptions of items. To use **Wish List Entry Mode**:

1. From the **Point of Sale** window, find the customer record as usual.
2. From the upper left corner of the window next to the customer information, select **Wish List**. A sub-menu of wish list actions will appear.



3. From this menu, select **Wish List Entry Mode**. The **Point of Sale** window will change to remove non-Wish List functions.



POINT OF SALE - Zachary, Mike (001-00652)

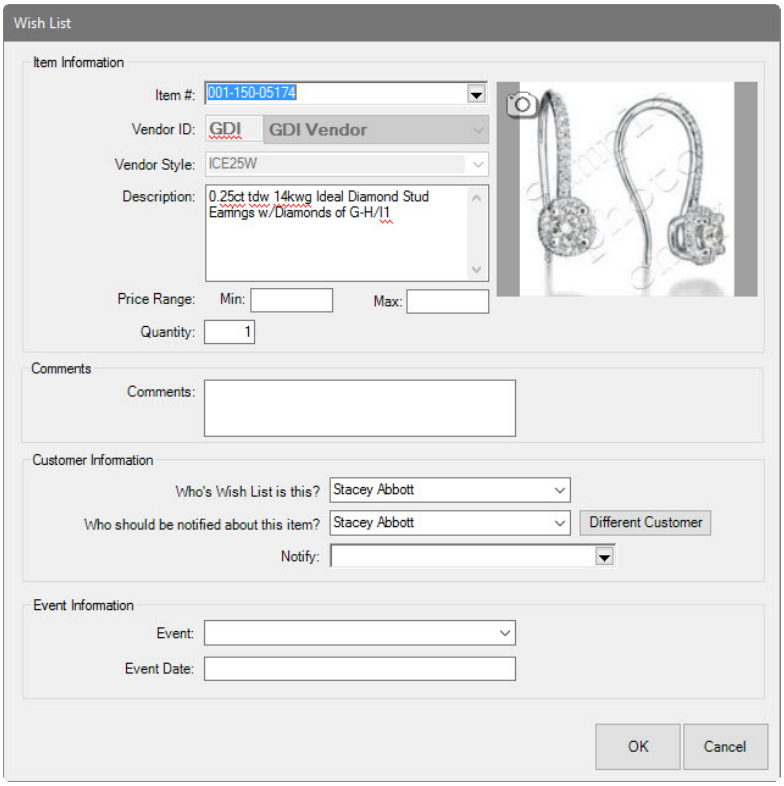
Associate 1 Owner, Tom (1)

Customer #001-00652

Mike Zachary
92 Canmer Rd
Shelton, CT 06484
869-3825
Do Not E-mail
Birthday (Mike): Jul 4
Anniversary: 11/7/2002

30 124461 143 95742 02/1984

4. Select **Save to Wish List**. Only fields required for wish list entry will appear.
5. To add items, select **Wish List Item**. The item line **More** button will change to read **Modify Wish** and flash black and red.
6. Select the **Modify Wish** button. The **Wish List** window will appear with some of the fields populated based on the data entered at point of sale.



Item #: 001-150-05174
Vendor ID: GDI GDI Vendor
Vendor Style: ICE25W
Description: 0.25ct tdw 14kwg Ideal Diamond Stud Earrings w/Diamonds of G-H/I1
Price Range: Min: Max:
Quantity: 1
Comments:
Who's Wish List is this? Stacey Abbott
Who should be notified about this item? Stacey Abbott
Notify:
Event:
Event Date:

Fields and options in this **Wish List** window include:

Item #	Use this to indicate that it is not a stock item, or use the drop-down menu to start the **Item Find** function and locate a particular item.
Vendor ID	Enter or find the vendor of the item.
Vendor Style	Enter or find the vendor style.
Description	This is an opportunity to express a wish for a non-stock item. It's also an opportunity to discuss options and ideas with the customer. Enter a description of the item. The more the customer can tell you about what he or she wants, the more useful it will be for the buyer.
Price Range	Use the **Min.** and **Max.** fields to enter a bottom and top monetary range.
Quantity	Enter the number desired.
Comments	Other information that might help a gift-giver.
Whose wish list is this?	Indicates who wishes for the item. The default is self.

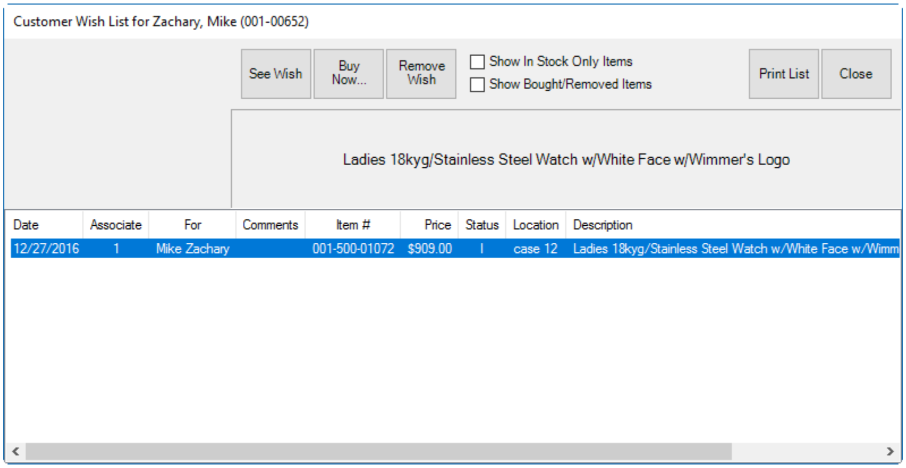
Who should be notified about this item?	Indicates who should be notified about the item. The default is Spouse. Select **Different Customer** to notify a different customer altogether. It will offer a list of related records or you can select a completely different customer.
Notify	Allows you to pick from the customer's existing contact information about how to send the notification. For more information, see the section entitled Notifications. Selecting **Add** allows you to specify a new method of contact, which will be saved on the customer account record. Once the record is saved, the notification will be sent. Because each wish list item has its own record, a separate notification will be sent for each one. Supervisors can resend a wish list. Find the wish, double click it to edit, and select **Supervisor**, and then **Resend Notification**.
Event	Indicates for what occasion the item might be a gift.
Event Date	Indicates the date of the occasion. If the event is an anniversary or birthday, it will be stored in the customer's record and can be queried for many marketing reasons.

7. Complete the fields as desired and select **OK**.
8. The item will be saved to the customer's wish list.

- **Only Whose wish list is this? and Description are required. This gives customers much more flexibility.**
- **Wish list entries from Wish List Entry Mode can be reset by selecting Start Over.**
- **If a wish list item is changed, a new notification will be sent.**

5.6.2 Other Wish List Options

From POS, if you have a customer selected and select **Wish List ► Show My Wish List Items**, The Edge returns a listing of items associated with the customer. For more about working with this list, see the section entitled Wish List Tab.



Customer Wish List for Zachary, Mike (001-00652)

Ladies 18kyg/Stainless Steel Watch w/White Face w/Wimmer's Logo

Date	Associate	For	Comments	Item #	Price	Status	Location	Description
12/27/2016	1	Mike Zachary		001-500-01072	$909.00	I	case 12	Ladies 18kyg/Stainless Steel Watch w/White Face w/Wimm

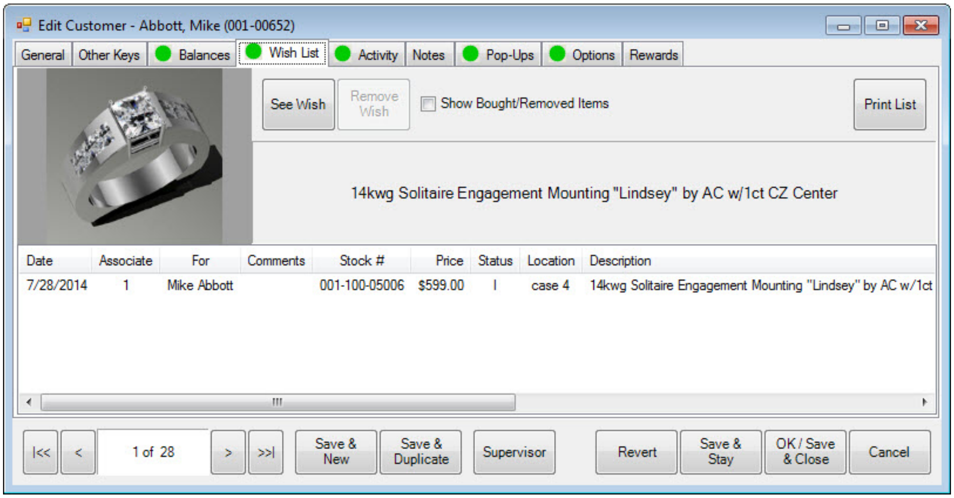
Use Buy Now… to send the selected item to a sale line in the **POS** screen.

Show Another Customer's Wish List Items returns the **Find Customer** function to locate a customer and obtain his or her wish list.

5.6.3 Finding a Customer's Wishes

To find a customer's wish list:

1. Locate the customer record using **Customer** ► **Find**.
2. Open the **Wish List** tab.



Edit Customer - Abbott, Mike (001-00652)

14kwg Solitaire Engagement Mounting "Lindsey" by AC w/1ct CZ Center

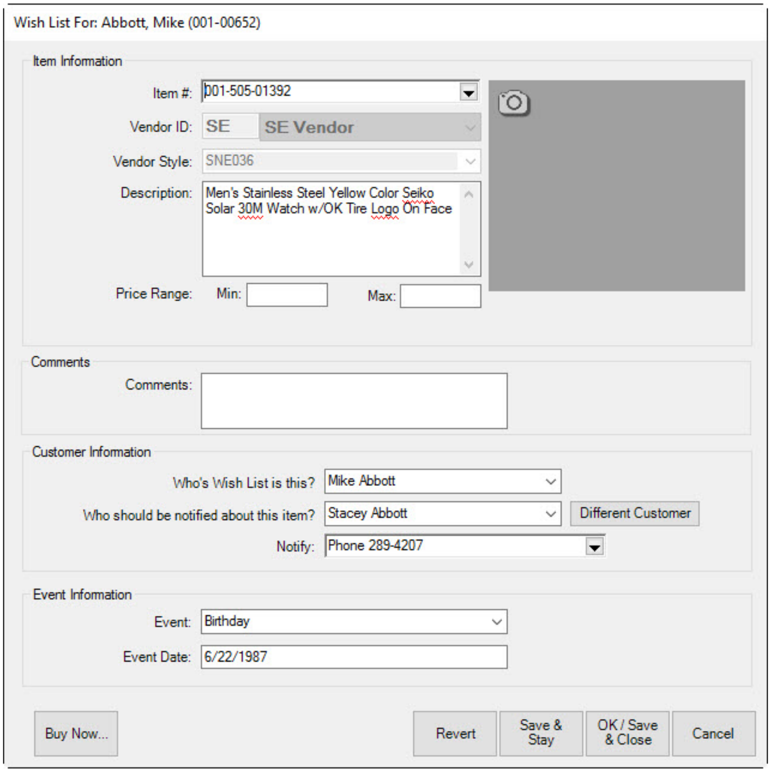
Date	Associate	For	Comments	Stock #	Price	Status	Location	Description
7/28/2014	1	Mike Abbott		001-100-05006	$599.00	I	case 4	14kwg Solitaire Engagement Mounting "Lindsey" by AC w/1ct

3. Double-click the record to work with and edit as needed.

5.6.4 Selling Wish List Items

To sell a wish list item to a customer:

1. Open **Point of Sale** and perform a **Find Customer**.
2. Select **Wish List▶ Show My Wish List Items**. A list of wishes will appear.
3. Locate the item to be purchased and double click the record. The **Wish List** window will appear, this time with a **Buy Now** option.



Wish List For: Abbott, Mike (001-00652)

Item Information

Item #: 001-505-01392

Vendor ID: SE SE Vendor

Vendor Style: SNE036

Description: Men's Stainless Steel Yellow Color Seiko Solar 30M Watch w/OK Tire Logo On Face

Price Range: Min: Max:

Comments

Comments:

Customer Information

Who's Wish List is this? Mike Abbott

Who should be notified about this item? Stacey Abbott

Notify: Phone 289-4207

Event Information

Event: Birthday

Event Date: 6/22/1987

4. If the item is the desired item, select **Buy Now**. The item will be created as a sale item in the **Point of Sale** window.

5.6.5 Alternate Items

If an item is no longer in stock, you will be prompted with a selection of alternative items. From here, you can go directly to the **Special Order** intake or **Item Find** functions.

- **Once a special order item is created to fulfill a wish list, the system considers the wish satisfied and removes it from the customer record.**
- **If you return an item from a wish list will set the wish list item back.**

5.6.6 Deleting a Wish List Entry

To delete a wish list entry:

1. Locate the customer record using **Customer ► Find**.
2. Open the **Wishes** tab.
3. Select the wish to be deleted and select **Remove Wish**.

5.6.7 Wish List Filters and Reports

Querying wish lists and running wish list reports are offered in three ways, but use the same basic filtering mechanism.

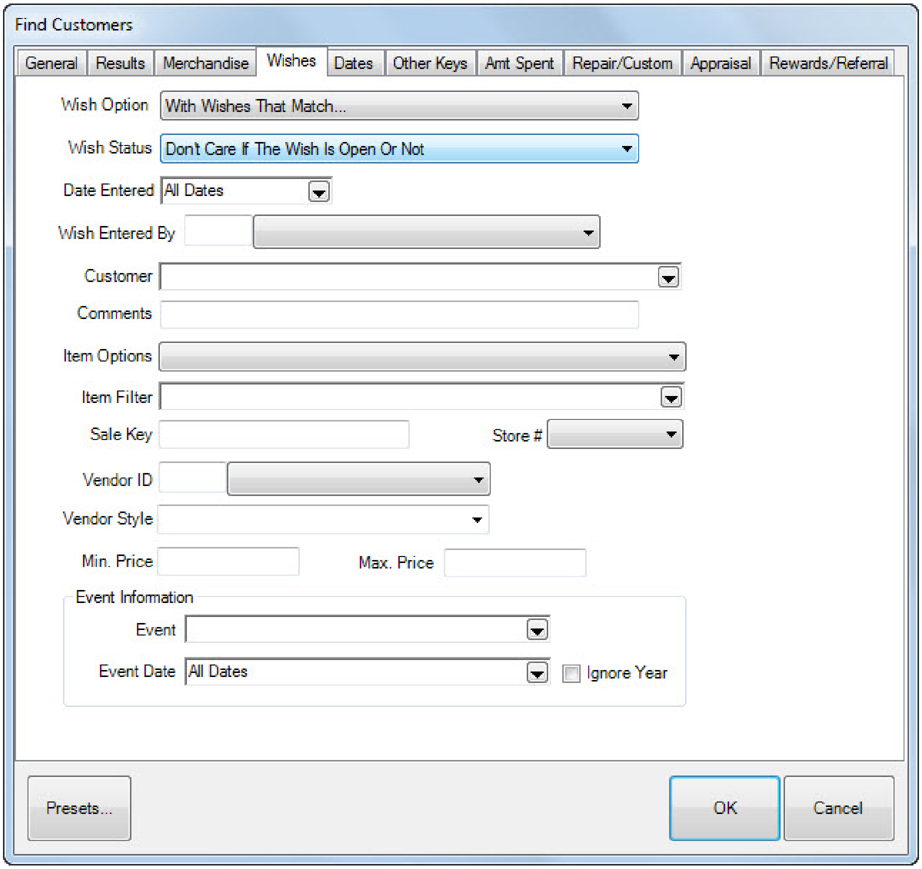
5.6.7.1 Find Customers by Wish Criteria

To find customers or to market to customers with a specific type of wish:

1. Select **Customers ► Find**. The **Customer Find** filter will appear.
2. Select the **Wishes** tab from the filter window.
3. In the **Wishes** tab, you will see the **Wish Option** drop-down menu, select from three options:

Don’t care about wishes	In this case, no filtering by wishes will occur.
With wishes that match	To filter by wishes that match criteria to be specified.
With wishes that don’t match	To exclude wishes with criteria to be specified.

4. Select the filtering option and select **OK**. The **Wish** filter with options that apply to your match selection will appear.



Wish Option: With Wishes That Match...

Wish Status: Don't Care If The Wish Is Open Or Not

Date Entered: All Dates

Wish Entered By

Customer

Comments

Item Options

Item Filter

Sale Key

Store #

Vendor ID

Vendor Style

Min. Price

Max. Price

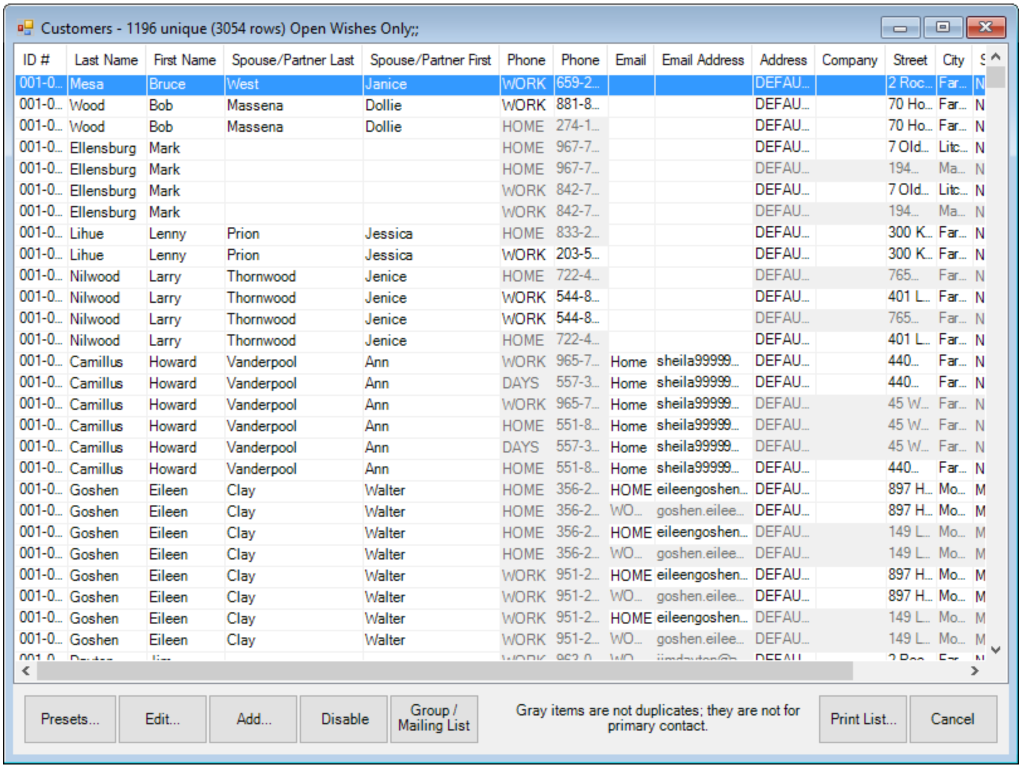
Event Information

Event

Event Date: All Dates

☐ Ignore Year

5. Enter parameters that describe the wishes you're looking for.
6. Select other tabs to further narrow the kind of customer you're looking for.
7. Select **OK**. A list of customers with matching wishes will appear.



Customers - 1196 unique (3054 rows) Open Wishes Only;;

ID #	Last Name	First Name	Spouse/Partner Last	Spouse/Partner First	Phone	Phone	Email	Email Address	Address	Company	Street	City	S
001-0...	Mesa	Bruce	West	Janice	WORK	659-2...			DEFAU...		2 Roc...	Far...	N
001-0...	Wood	Bob	Massena	Dollie	WORK	881-8...			DEFAU...		70 Ho...	Far...	N
001-0...	Wood	Bob	Massena	Dollie	HOME	274-1...			DEFAU...		70 Ho...	Far...	N
001-0...	Ellensburg	Mark			HOME	967-7...			DEFAU...		7 Old...	Litc...	N
001-0...	Ellensburg	Mark			HOME	967-7...			DEFAU...		194...	Ma...	N
001-0...	Ellensburg	Mark			WORK	842-7...			DEFAU...		7 Old...	Litc...	N
001-0...	Ellensburg	Mark			WORK	842-7...			DEFAU...		194...	Ma...	N
001-0...	Lihue	Lenny	Prion	Jessica	HOME	833-2...			DEFAU...		300 K...	Far...	N
001-0...	Lihue	Lenny	Prion	Jessica	WORK	203-5...			DEFAU...		300 K...	Far...	N
001-0...	Nilwood	Larry	Thornwood	Jenice	HOME	722-4...			DEFAU...		765...	Far...	N
001-0...	Nilwood	Larry	Thornwood	Jenice	WORK	544-8...			DEFAU...		401 L...	Far...	N
001-0...	Nilwood	Larry	Thornwood	Jenice	WORK	544-8...			DEFAU...		765...	Far...	N
001-0...	Nilwood	Larry	Thornwood	Jenice	HOME	722-4...			DEFAU...		401 L...	Far...	N
001-0...	Camillus	Howard	Vanderpool	Ann	WORK	965-7...	Home	sheila99999...	DEFAU...		440...	Far...	N
001-0...	Camillus	Howard	Vanderpool	Ann	DAYS	557-3...	Home	sheila99999...	DEFAU...		440...	Far...	N
001-0...	Camillus	Howard	Vanderpool	Ann	WORK	965-7...	Home	sheila99999...	DEFAU...		45 W...	Far...	N
001-0...	Camillus	Howard	Vanderpool	Ann	HOME	551-8...	Home	sheila99999...	DEFAU...		45 W...	Far...	N
001-0...	Camillus	Howard	Vanderpool	Ann	DAYS	557-3...	Home	sheila99999...	DEFAU...		45 W...	Far...	N
001-0...	Camillus	Howard	Vanderpool	Ann	HOME	551-8...	Home	sheila99999...	DEFAU...		440...	Far...	N
001-0...	Goshen	Eileen	Clay	Walter	HOME	356-2...	HOME	eileengoshen...	DEFAU...		897 H...	Mo...	M
001-0...	Goshen	Eileen	Clay	Walter	HOME	356-2...	WO...	goshen.eilee...	DEFAU...		897 H...	Mo...	M
001-0...	Goshen	Eileen	Clay	Walter	HOME	356-2...	HOME	eileengoshen...	DEFAU...		149 L...	Mo...	M
001-0...	Goshen	Eileen	Clay	Walter	HOME	356-2...	WO...	goshen.eilee...	DEFAU...		149 L...	Mo...	M
001-0...	Goshen	Eileen	Clay	Walter	WORK	951-2...	HOME	eileengoshen...	DEFAU...		897 H...	Mo...	M
001-0...	Goshen	Eileen	Clay	Walter	WORK	951-2...	WO...	goshen.eilee...	DEFAU...		897 H...	Mo...	M
001-0...	Goshen	Eileen	Clay	Walter	WORK	951-2...	HOME	eileengoshen...	DEFAU...		149 L...	Mo...	M
001-0...	Goshen	Eileen	Clay	Walter	WORK	951-2...	WO...	goshen.eilee...	DEFAU...		149 L...	Mo...	M

Gray items are not duplicates; they are not for primary contact.

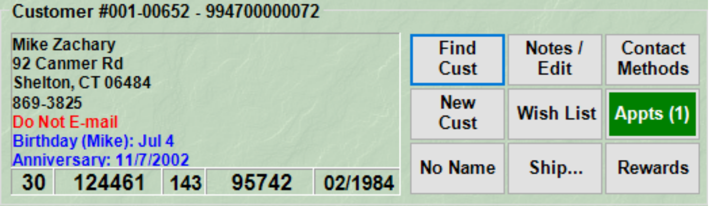
5.6.8 Best Practices and Tips for Wish Lists

Here are some ways wish lists can be used.

- Save to a wish list a collection of items a customer has shown interest in.
- Enter **Wish List Entry Mode** to add in-stock items, non-stock items, and generic wish list entries:
    - Example: A vendor/vendor style number that is available but the store has never stocked it.
    - Example2: Customer desires ½-carat diamond studs, but there is no specific vendor, item, etc.
- Store event type and date information while adding a wish list:
    - Event and date information will update on the customer's account record.
    - If event date differs from that shown in the customer record, you will be prompted to update it.
- Notifications allow you to set "who to notify" and "how to notify" while entering wish lists:
    - Notifications can be sent automatically via email or text message with required setup.
    - Adding a new contact method for notification automatically updates contact record for account.

5.7 Working Appointments at POS

If a customer with open appointments comes into the store, when his record is brought up at Point of Sale, a green button will come up near his customer information. This allows you to act on the appointment right there.



Customer #001-00652 - 994700000072

Mike Zachary
92 Canmer Rd
Shelton, CT 06484
869-3825
Do Not E-mail
Birthday (Mike): Jul 4
Anniversary: 11/7/2002

30 124461 143 95742 02/1984

To work with the appointment:

1. Select **Appointments**. The customer record will appear with the **Appointments** tab open.
2. Open the desired appointment record.
3. Make notes and indicate next action as described in the section entitled Appointments.

You can also add appointments from this window as described in the section entitled Appointments.

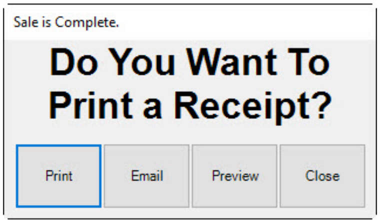
5.8 Sales Tax Option

The **Sales Tax** option can be checked or unchecked as necessary for each sale. Also, because there may be more than one jurisdiction collecting sales tax, a drop-down list is available to the right of the **Tax** field allowing you to turn off one or more taxes.

5.9 Completing the Transaction

When all items have been entered into the **Point of Sale** window, and payment has been made satisfactorily, use **Done** to complete the transaction.

Depending on **System Options** settings, The Edge will offer a combination of four options when you select **Done**:



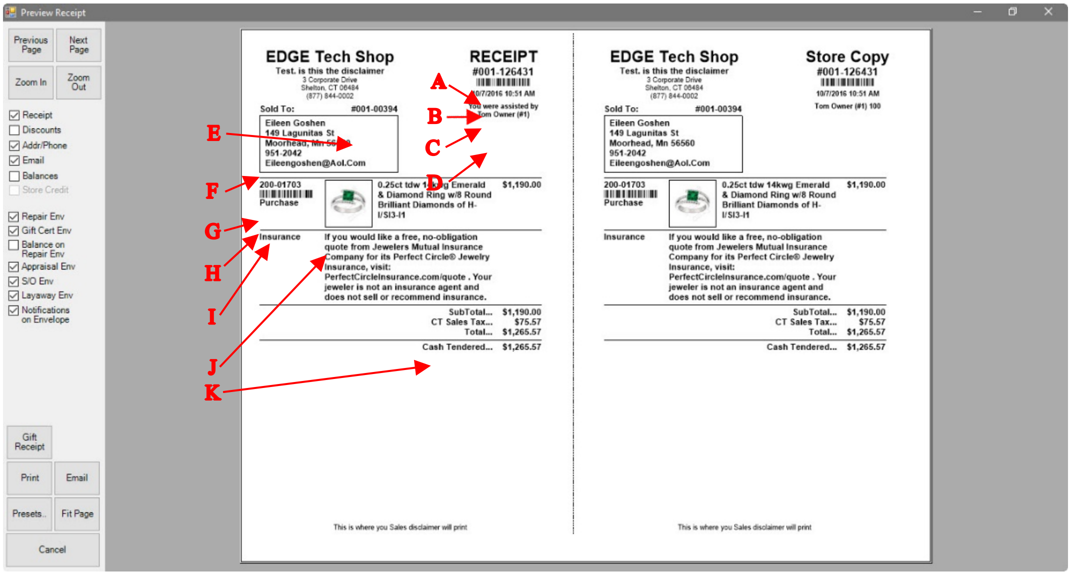
Sale is Complete.

Do You Want To Print a Receipt?

1. It will proceed directly to printing the receipt.
2. It will offer an option to provide a preview before printing.
3. It will offer an option to email a receipt; you will be prompted to select or enter the email address to which it should be sent. See the section entitled Email Settings for email receipt setup.
4. It will offer a gift receipt.

Once you select one of these options, either the window will clear with a message that the sale is complete, or the receipt preview will appear.

The content of the receipt appears as follows:



☑ Receipt
☐ Discounts
☑ Addr/Phone
☑ Email
☐ Balances
☐ Store Credit
☑ Repair Env
☑ Gift Cert Env
☐ Balance on Repair Env
☑ Appraisal Env
☑ S/O Env
☑ Layaway Env
☑ Notifications on Envelope

EDGE Tech Shop
Test. is this the disclaimer
3 Corporate Drive
Shelton, CT 06484
(877) 844-0002

RECEIPT
#001-126431
10/7/2016 10:51 AM
You were assisted by
Tom Owner (#1)

Sold To: #001-00394

Eileen Goshen
149 Lagunitas St
Moorhead, Mn 56560
951-2042
Eileengoshen@Aol.Com

200-01703 Purchase	0.25ct tdw 14kwg Emerald & Diamond Ring w/8 Round Brilliant Diamonds of H-I/SI3-I1	$1,190.00
Insurance	If you would like a free, no-obligation quote from Jewelers Mutual Insurance Company for its Perfect Circle® Jewelry Insurance, visit: PerfectCircleInsurance.com/quote . Your jeweler is not an insurance agent and does not sell or recommend insurance.	

SubTotal... $1,190.00
CT Sales Tax... $75.57
Total... $1,265.57

Cash Tendered... $1,265.57

This is where you Sales disclaimer will print

EDGE Tech Shop
Test. is this the disclaimer
3 Corporate Drive
Shelton, CT 06484
(877) 844-0002

Store Copy
#001-126431
10/7/2016 10:51 AM
Tom Owner (#1) 100

Sold To: #001-00394

Eileen Goshen
149 Lagunitas St
Moorhead, Mn 56560
951-2042
Eileengoshen@Aol.Com

200-01703 Purchase 0.25ct tdw 14kwg Emerald & Diamond Ring w/8 Round Brilliant Diamonds of H-I/SI3-I1 $1,190.00

Insurance If you would like a free, no-obligation quote from Jewelers Mutual Insurance Company for its Perfect Circle® Jewelry Insurance, visit: PerfectCircleInsurance.com/quote . Your jeweler is not an insurance agent and does not sell or recommend insurance.

SubTotal... $1,190.00
CT Sales Tax... $75.57
Total... $1,265.57

Cash Tendered... $1,265.57

This is where you Sales disclaimer will print

Information featured on the receipt is customizable through **System Options**. By default, the following information is provided:

A	Receipt number. This can be entered to bring up records for returns or pickups.
B	The barcode for the receipt number. This can be scanned to bring up records for returns or pickups.
C	Date and time of transaction.
D	Associate who handled the transaction.
E	Customer number.
F	Customer name and contact information.
G	The item number.
H	The barcode for the item number.
I	Type of transaction for that item number.
J	Description of the item
K	Total, tax, and payment information.

In addition, credit card receipts will have addition information in the receipt. Credit card receipts include:

- Card number
- Authorization code
- Approval data

- Invoice number
- A place for the customer signature.

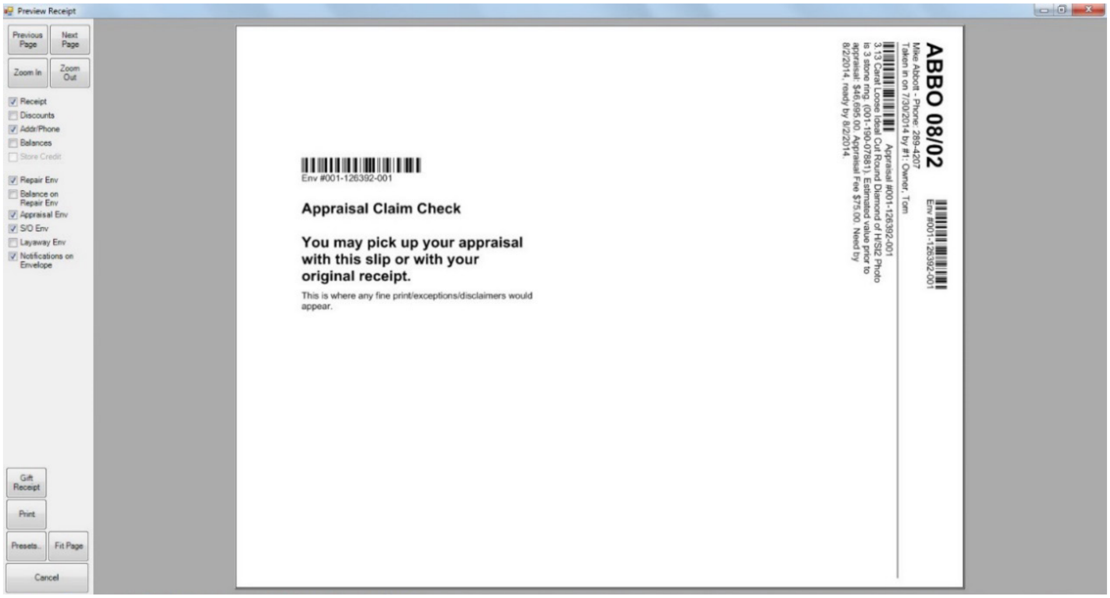
Features and options in the **Preview Receipt** window include:

Previous Page	View the previous page of the receipt.
Next Page	View the next page of the receipt.
Zoom In	Enlarge the image.
Zoom Out	Shrink the image.
Receipt	Print a receipt.
Discounts	Show discounts on the receipt.
Addr/Phone	Show the customer's address and phone number on the receipt.
Email	Show the customer's email address on the receipt.
Balances	Show charge balances on the receipt.
Store Credit	Show any store credits on the receipt.
Repair Envelope	Print a repair envelope.
Balance on Repair Envelope	Show the amount due on a repair on the repair envelope.
Appraisal Envelope	Print an appraisal envelope.
S/O Env	Print a special order envelope.
Layaway Env	Print a layaway envelope.
Notifications on Envelope	Show notification information on the envelope.
Gift Receipt	Prints a gift receipt without amounts.
Print	Print the receipt as previewed.
Email	Email the receipt; you will be prompted to select or enter an email address.
Presets	Opens the **Presets** menu for receipt settings.
Fit Page	Fit the page image on the window.
Cancel	Closes the **Preview** window. The sale is completed, but no receipt is printed.

For information about working with completed sales transactions, see the section entitled Find Sales.

5.9.1 Envelopes

Services such as repairs, special orders, and appraisals include an envelope insert along with the receipt. It is intended to fold up and slip into a clear envelope that contains the item on which to be worked. Envelopes are generated in the **Preview Receipt** window, usually as a second page to the receipt.



☑ Receipt
☐ Discounts
☑ Addr/Phone
☐ Balances
☐ Store Credit
☑ Repair Env
☐ Balance on Repair Env
☑ Appraisal Env
☑ S/O Env
☐ Layaway Env
☑ Notifications on Envelope

Env #001-126392-001

Appraisal Claim Check

You may pick up your appraisal with this slip or with your original receipt.

This is where any fine print/exceptions/disclaimers would appear.

ABBO 08/02

Env #001-126392-001

Mike Abbott - Phone: 289-4207
Taken in on 7/30/2014 by #1: Owner, Tom

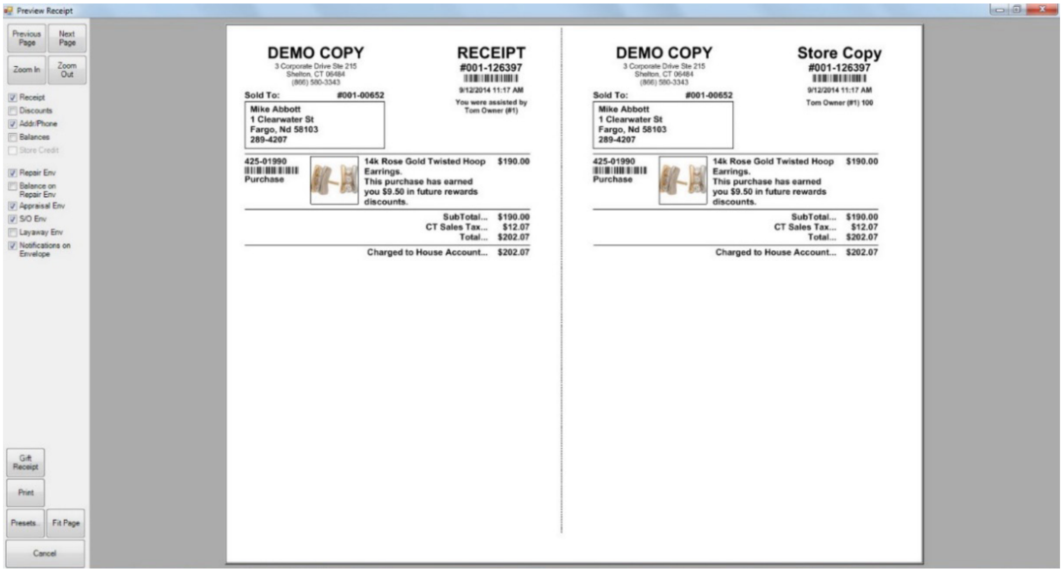
Appraisal #001-126392-001
3.13 Carat Loose Ideal Cut Round Diamond of H/SI2 Photo is 3 stone ring. (001-190-07881). Estimated value prior to appraisal: $46,695.00. Appraisal Fee $75.00. Need by 8/2/2014, ready by 8/2/2014.

5.9.2 Gift Receipts

5.9.2.1 Generating Gift Receipts

Gift receipts are printed similarly to regular receipts, with some additional options. To print a gift receipt:

1. Conduct a transaction from point of sale as usual, selecting **Done** to complete the transaction. If set in **System Options**, a preview of the receipt will appear.



☑ Receipt
☐ Discounts
☑ Addr/Phone
☐ Balances
☐ Store Credit

☑ Repair Env
☐ Balance on Repair Env
☑ Appraisal Env
☑ S/O Env
☐ Layaway Env
☑ Notifications on Envelope

DEMO COPY
3 Corporate Drive Ste 215
Shelton, CT 06484
(866) 580-3343

RECEIPT
#001-126397
9/12/2014 11:17 AM
You were assisted by
Tom Owner (#1)

Sold To: #001-00652
Mike Abbott
1 Clearwater St
Fargo, Nd 58103
289-4207

425-01990
Purchase

14k Rose Gold Twisted Hoop Earrings. This purchase has earned you $9.50 in future rewards discounts. $190.00

SubTotal... $190.00
CT Sales Tax... $12.07
Total... $202.07
Charged to House Account... $202.07

DEMO COPY
3 Corporate Drive Ste 215
Shelton, CT 06484
(866) 580-3343

Store Copy
#001-126397
9/12/2014 11:17 AM
Tom Owner (#1) 100

Sold To: #001-00652
Mike Abbott
1 Clearwater St
Fargo, Nd 58103
289-4207

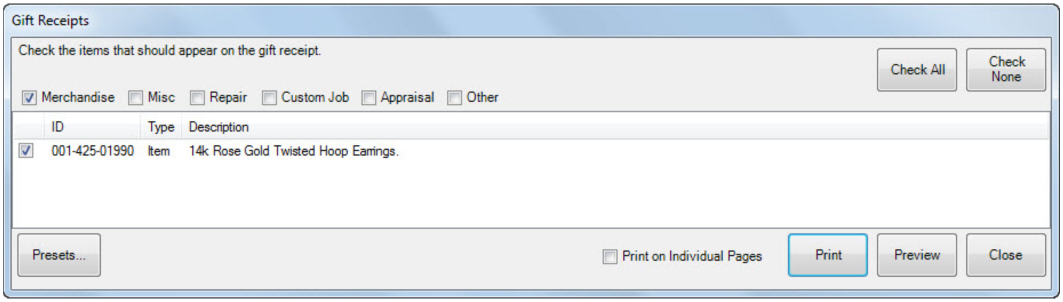
425-01990
Purchase

14k Rose Gold Twisted Hoop Earrings. This purchase has earned you $9.50 in future rewards discounts. $190.00

SubTotal... $190.00
CT Sales Tax... $12.07
Total... $202.07
Charged to House Account... $202.07

To turn on receipt previews, use System Options ► Receipt Options ► Receipt Preview and set it to `True`.

2. From the lower left corner of the **Preview Receipt** window, select **Gift Receipt**. The **Gift Receipts** window will appear.



Check the items that should appear on the gift receipt.

☑ Merchandise ☐ Misc ☐ Repair ☐ Custom Job ☐ Appraisal ☐ Other

	ID	Type	Description
☑	001-425-01990	Item	14k Rose Gold Twisted Hoop Earrings.

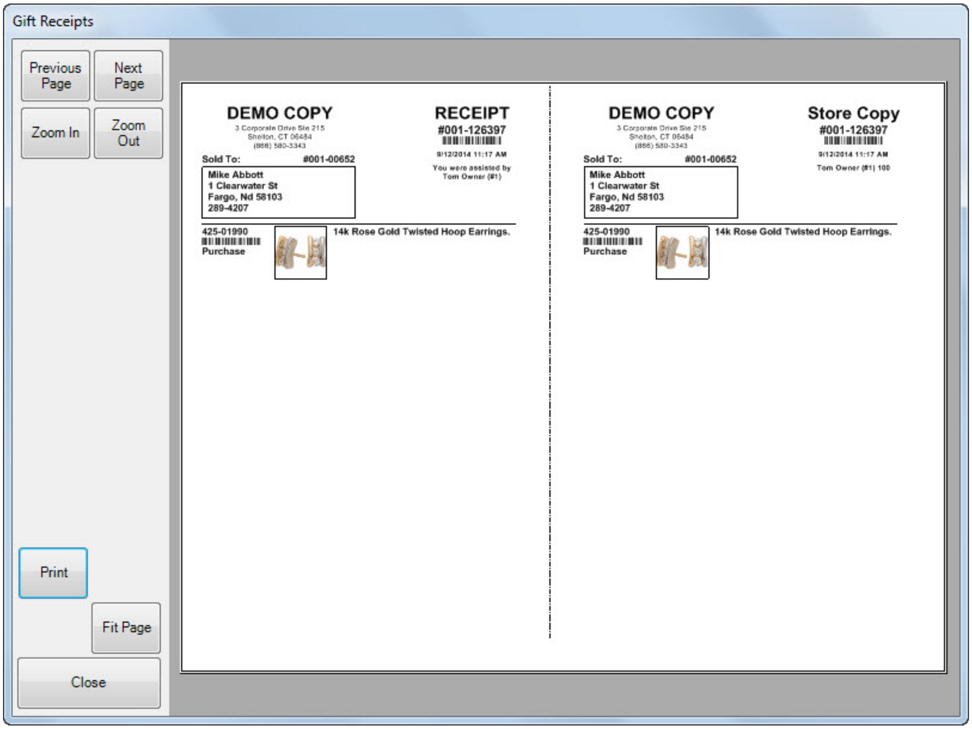
☐ Print on Individual Pages

Fields and options in the **Gift Receipts** window include:

Check the items that should appear on the gift receipt	Select types of transactions to include gift receipts for: **Merchandise**, **Misc**, **Repair**, **Custom Job**, **Appraisal**, and **Other**.
Check All	Select all items listed for gift receipts.
Check None	Unselect all items listed for gift receipts.

Print on Individual pages	Allows you to print each receipt on separate pages for distribution to separate gift recipients.
Print	Proceed with printing of the gift receipts.
Close	Close the **Gift Receipts** window.
Presets	Use presets to set the behavior for the gift receipt form.

3. Select options as required and select **Print**. A second **Gift Receipts** preview window will appear without pricing.



DEMO COPY
3 Corporate Drive Ste 215
Shelton, CT 06484
(866) 580-3343

RECEIPT
#001-126397
9/12/2014 11:17 AM
You were assisted by
Tom Owner (#1)

Sold To: #001-00652

Mike Abbott
1 Clearwater St
Fargo, Nd 58103
289-4207

425-01990
Purchase
14k Rose Gold Twisted Hoop Earrings.

DEMO COPY
3 Corporate Drive Ste 215
Shelton, CT 06484
(866) 580-3343

Store Copy
#001-126397
9/12/2014 11:17 AM
Tom Owner (#1) 100

Sold To: #001-00652

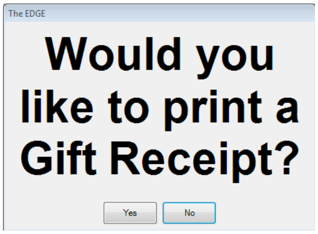
Mike Abbott
1 Clearwater St
Fargo, Nd 58103
289-4207

425-01990
Purchase
14k Rose Gold Twisted Hoop Earrings.

4. If the receipts look correct, select **Print**. If not, select **Cancel** and make changes.

5.9.2.2 How System Options Impact Gift Receipts

If **Ask Before Printing Receipt** is set to `True`, it will prompt for printing receipts, but also prompt "Would you like a gift receipt?"



If **Ask to Print Gift Receipt** is enabled (it is the default), when a receipt is printed, you will be prompted as to whether you want a gift receipt. If you select **Yes**, the **Gift Receipt** window as described above will appear.

If your store has **Preview** enabled, you have full control of the Gift Receipt functions; the button is present.

If you have **Preview** enabled AND **Ask to Print Gift Receipt** set to True, when you select **Print** from the preview, you get the prompt again.

If you have **Ask Before Printing Receipt** set to True and **Preview** to False, when you select **Done** from **Point of Sale**, a button offering if you would like a gift receipt will appear.

If you have both **Preview** and **Ask Before Printing Receipt** set to False, AND **Ask to Print Gift Receipt** set to True, The Edge prints a receipt silently as usual, but will offer the **"Would you like a gift receipt?"** option. If you select **Yes**, the gift receipt picker will appear.

- **If you forget to print a gift receipt, you can do so any time just as you would reprint any receipt. Lookup the sale, select it, and select Gift Receipt from the preview. To do so, use Customer ► Sales ► Find ► or use Point of Sale ► Review Receipts.**
- **Gift receipts are available for any completed transaction (e.g., item sale, repair pickup, layaway pickup).**
- **Transactions such as intake, payments, returns, and trades, which are part of the current transaction, are automatically excluded to make the gift receipt appropriate.**

5.9.3 Jewelers Mutual Insurance Option

As an add-on, you can offer your customers a quote insurance on their new purchase right at point of sale. For more information, see the section entitled Jewelers Mutual Insurance Company.

5.9.4 Podium

Podium is a reputation management company that helps you obtain and publish store reviews on several popular listing sites such as Google and Facebook. It also has a text messaging (SMS) component that integrates with The Edge notification system. This can be setup to automatically notify a customer via text when their job is ready for pickup. Podium includes a website allowing you to manage, view, and reply to text messages from your customers.

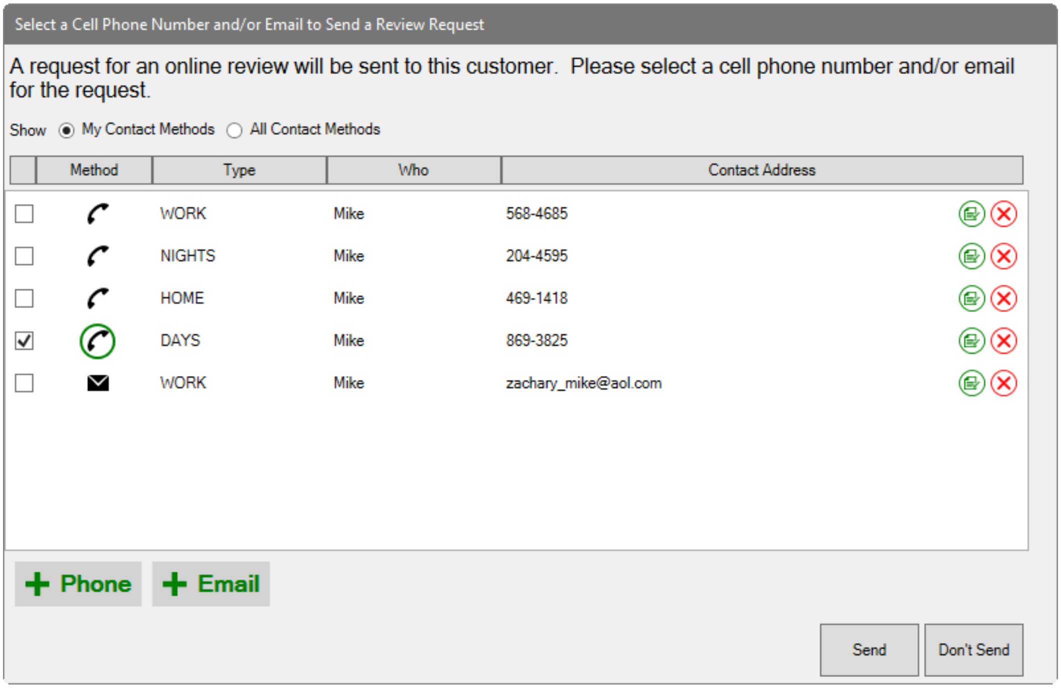
For more information and to sign up for Podium, contact The Edge Customer Service team at service@ajsllc.com.

Once you have Podium licensed, it works according to the **Podium Contact Method System Option**, which offers values as follows.

- `Only Send Correct Phone Email`: Without offering options at POS, Podium will automatically send the customer a text message or email, if correctly formatted information is provided, asking for a review.
- `Open Phone Email Selector Every Time`: Offers the prompt at POS with every customer transaction asking for verification of data and whether to send text or email.
- `Open Phone Email Selector When Addresses Not Correct`: If the phone number or email address are not available or of the correct format, The Edge will open the selector window for further action.

To work with Podium at POS for reviews:

1. Complete the transaction as usual. When you select **Done**, one of two things will happen according to the **System Options** listed above:
    a. If you have **Only Send Correct Phone Email** selected, Podium will seamlessly send a text or email, whichever is first available with good data. The Edge will proceed to complete the sale and you should work with receipts as usual. You will not have any interaction with Podium.
    b. If you have **Open Phone Email Selector Every Time** or **Open Phone Email Selector When Defaults are Not Correct**, and the defaults are indeed incorrect, the **Podium** window will open. Proceed to step 2.
2. The **Select a Cell Phone Number and/or Email to Send a Review Request** window will appear.



Select a Cell Phone Number and/or Email to Send a Review Request

A request for an online review will be sent to this customer. Please select a cell phone number and/or email for the request.

Show ● My Contact Methods ○ All Contact Methods

	Method	Type	Who	Contact Address
☐	☎	WORK	Mike	568-4685
☐	☎	NIGHTS	Mike	204-4595
☐	☎	HOME	Mike	469-1418
☑	☎	DAYS	Mike	869-3825
☐	✉	WORK	Mike	zachary_mike@aol.com

3. Verify that the data is correct and/or select the desired contact method.
4. To add a phone number or email address, select the appropriate add (+) button. The new contact information will be saved to the customer record.
5. To change a phone number or email address, use the edit button. The changed contact information will be saved to the customer record.
6. If you do not want a request to go to the customer at all, select **Don't Send**.
7. Otherwise, select **Send**.
8. Continue with processing the receipt.

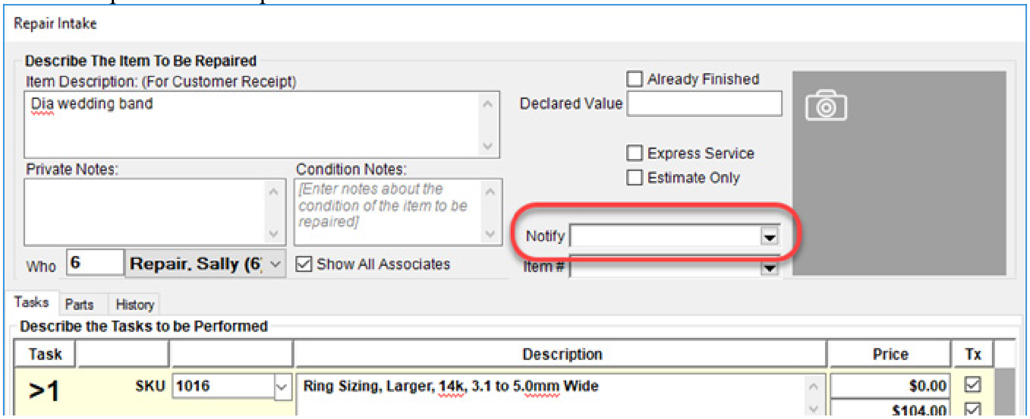
The Edge and Podium want to make sure your customers are not overburdened. If a customer has been sent a request from your store within 60 days, you will be notified that the customer has already been sent a request and should not be sent another. You can increase this number in System Options.

Podium System Options can dictate whether a request should be sent for interim transactions or only at final transaction, such as repair intake vs. final pickup.

To use Podium for notifications:

1. You must enable Podium text notifications. This is done by going to **System Options**, navigating to **Podium Options**, and setting **Use Podium for Text Notifications** to **True**.

2. On job intake, there is a **Notification** dropdown. Clicking this will yield a window allowing you to select the preferred cell phone number.



Item Description: (For Customer Receipt) Dia wedding band

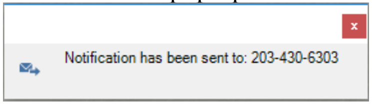
Who 6 Repair, Sally (6

☑ Show All Associates

Notify

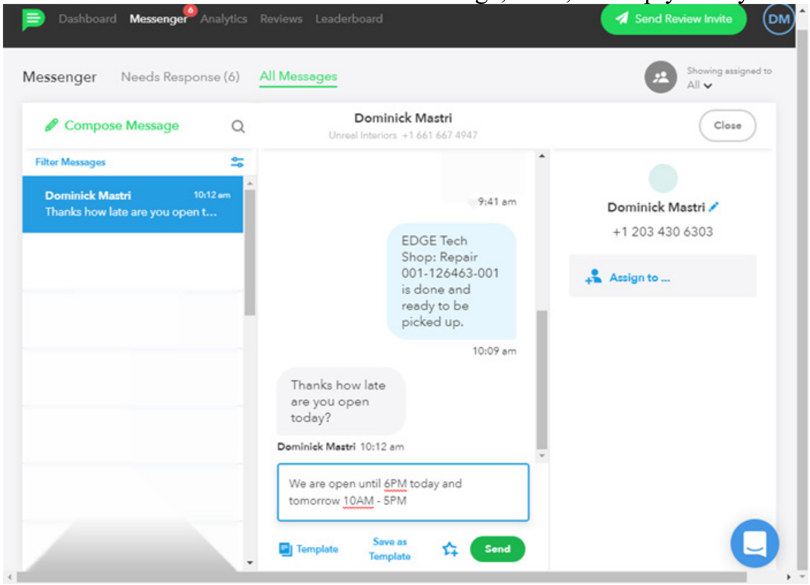
Task			Description	Price	Tx
>1	SKU	1016	Ring Sizing, Larger, 14k, 3.1 to 5.0mm Wide	$0.00	☑
				$104.00	☑

3. When the job is marked Done the system will automatically send the customer a text message alert. A window will pop-up at the bottom of your screen indicating this has been sent.



Notification has been sent to: 203-430-6303

4. You can utilize the Podium website to manage, view, and reply to any of these customer texts.



Dominick Mastri 10:12 am
Thanks how late are you open t...

Dominick Mastri
Unreal Interiors +1 661 667 4947

9:41 am

EDGE Tech Shop: Repair 001-126463-001 is done and ready to be picked up.

10:09 am

Thanks how late are you open today?

Dominick Mastri 10:12 am

We are open until 6PM today and tomorrow 10AM - 5PM

Dominick Mastri
+1 203 430 6303

Podium only works for job notifications. It does not support customer marketing texts.

6 Special Services

Layaways, special orders, and other services are all multi-part transactions within The Edge. Each of these types of transactions share the following characteristics:

1. These services are initiated and completed at point of sale, that is, when a customer makes the request and later picks up the item. Those activities are described in the section entitled Other Point-of-Sale Transaction Options.
2. Multiple payments can be made over time at POS.
3. The functions described in the following sections will allow you to edit the records, update the status of the orders, and move them from location to location.
4. Each may be cancelled at POS.
5. A pickup must be completed. The pickup indicates that the transaction is complete, the taxes are then considered due, and commissions are to be paid.

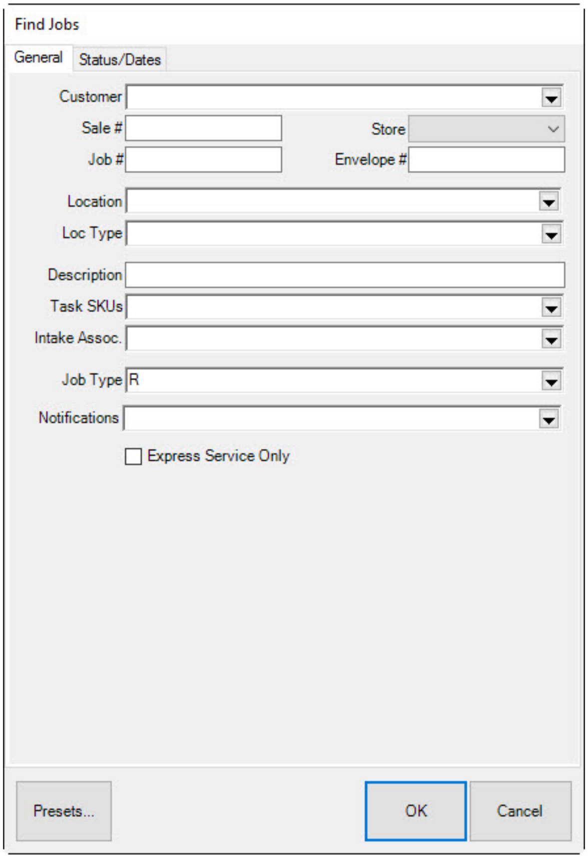
For a video tutorial about managing service records, go to http://www.screencast.com/t/jcMmnBj9.

6.1 Repairs and Custom Jobs

6.1.1 Finding and Editing a Job Record

To manage repairs:

1. Select **Services** ► **Find** ► **Job**. The **Find Job** filter with the **General** tab open will appear; it can be used to find repairs, custom jobs, or both.



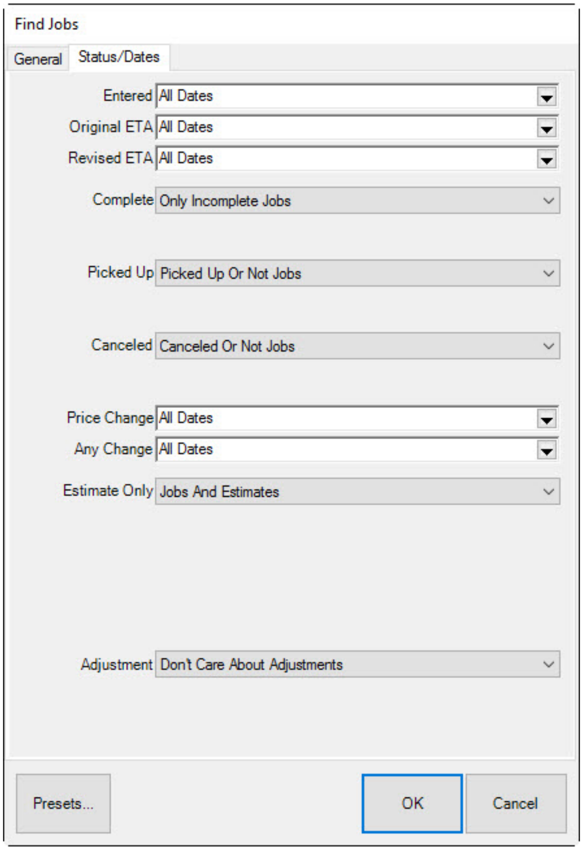
Job Type: R

☐ Express Service Only

Fields and options in the **General Tab** of **Find Jobs** window include:

Sale #	Returns records with matching sale numbers.
Store #	Returns records with the matching store ID.
Job #	Returns records with the matching job number.
Envelope #	Returns records with matching envelope number.
Location	Returns records with the matching repair workstation.
Loc Type	Returns records with the matching location type.
Description	Returns records with matching phrase in the description.
Task SKU(s)	Returns records with a matching task SKU. You can select from a tree structure.
Intake Assoc	Returns records with matching intake associate.
Job Type	Returns records of type repair, custom job, assembled, or built.

2. To filter by status or dates, select the **Status/Dates** tab.



Find Jobs

General | Status/Dates

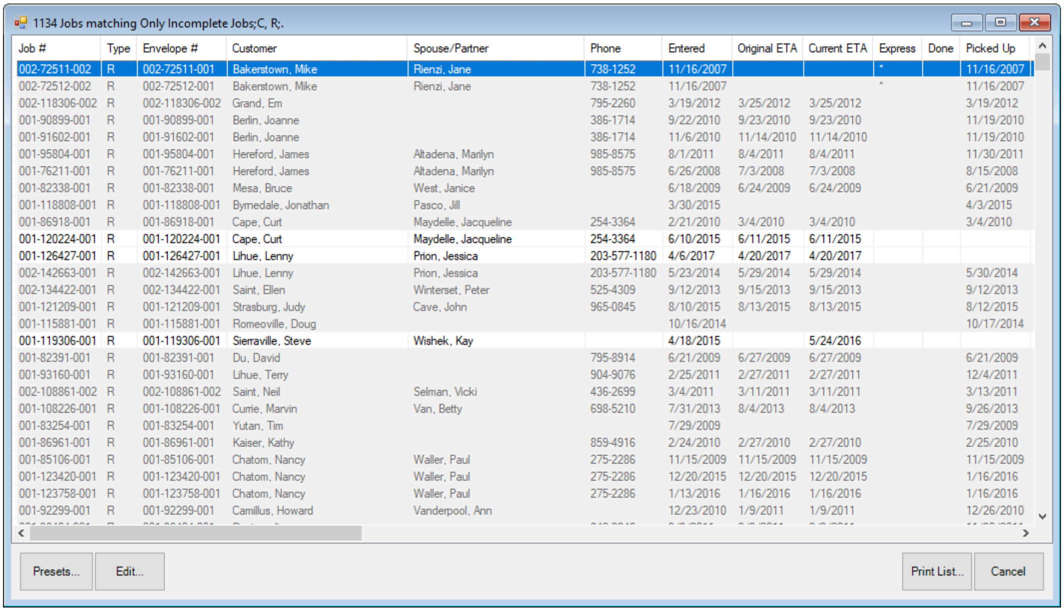
Entered: All Dates
Original ETA: All Dates
Revised ETA: All Dates
Complete: Only Incomplete Jobs
Picked Up: Picked Up Or Not Jobs
Canceled: Canceled Or Not Jobs
Price Change: All Dates
Any Change: All Dates
Estimate Only: Jobs And Estimates
Adjustment: Don't Care About Adjustments

Fields and options in the **Status/Dates** tab of **Find Repairs/Custom Jobs** window include:

Entered	Returns records entered on this date or date range.
Original ETA	Returns records with matching original ETA date(s).
Revised ETA	Returns records with the matching revised ETA date(s).
Complete	Toggles between including only complete job, only incomplete jobs, or all jobs.
Cancelled	Toggles between including only cancelled jobs, only jobs that are not cancelled, or all jobs.
Any Change	Returns records that underwent any change to their record on this date(s).
Adjustment	Returns records with specified adjustment activity.

3. Complete **Find Repair/Custom Job** fields as needed to retrieve the appropriate data.

4. Select **OK**. A list of matching repairs or custom jobs will appear.



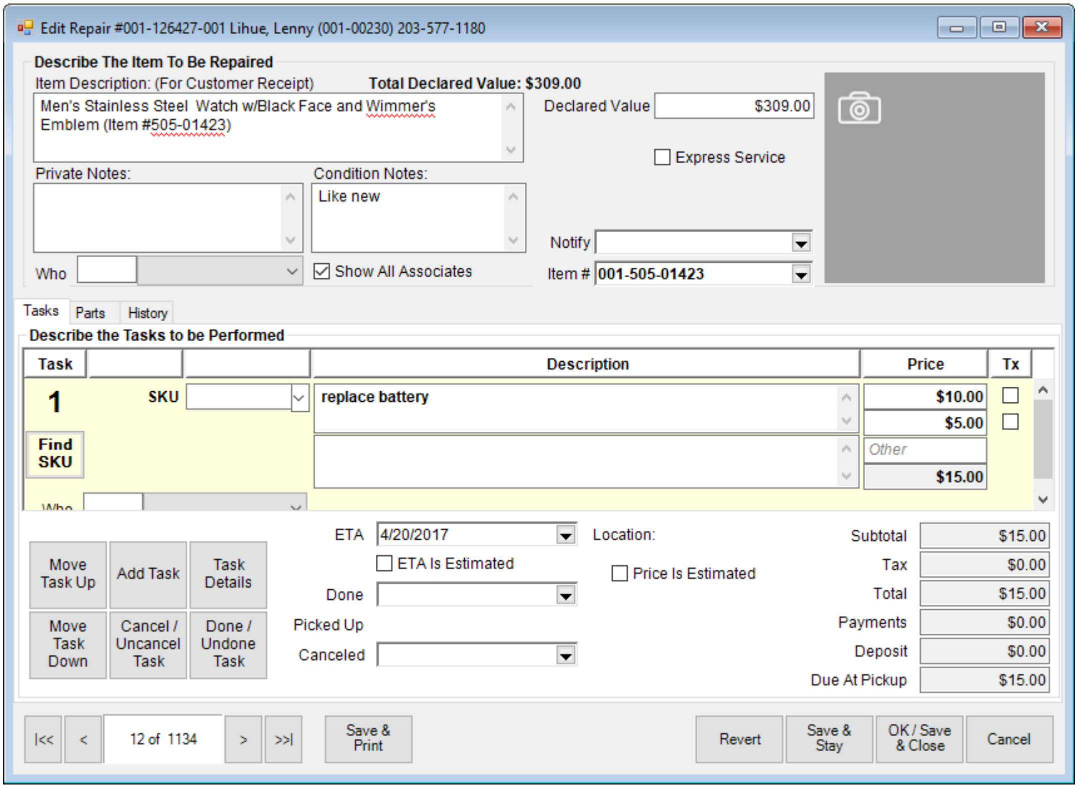
1134 Jobs matching Only Incomplete Jobs;C, R;.

Job #	Type	Envelope #	Customer	Spouse/Partner	Phone	Entered	Original ETA	Current ETA	Express	Done	Picked Up
002-72511-002	R	002-72511-001	Bakerstown, Mike	Rienzi, Jane	738-1252	11/16/2007			*		11/16/2007
002-72512-002	R	002-72512-001	Bakerstown, Mike	Rienzi, Jane	738-1252	11/16/2007			*		11/16/2007
002-118306-002	R	002-118306-002	Grand, Em		795-2260	3/19/2012	3/25/2012	3/25/2012			3/19/2012
001-90899-001	R	001-90899-001	Berlin, Joanne		386-1714	9/22/2010	9/23/2010	9/23/2010			11/19/2010
001-91602-001	R	001-91602-001	Berlin, Joanne		386-1714	11/6/2010	11/14/2010	11/14/2010			11/19/2010
001-95804-001	R	001-95804-001	Hereford, James	Altadena, Marilyn	985-8575	8/1/2011	8/4/2011	8/4/2011			11/30/2011
001-76211-001	R	001-76211-001	Hereford, James	Altadena, Marilyn	985-8575	6/26/2008	7/3/2008	7/3/2008			8/15/2008
001-82338-001	R	001-82338-001	Mesa, Bruce	West, Janice		6/18/2009	6/24/2009	6/24/2009			6/21/2009
001-118808-001	R	001-118808-001	Byrnedale, Jonathan	Pasco, Jill		3/30/2015					4/3/2015
001-86918-001	R	001-86918-001	Cape, Curt	Maydelle, Jacqueline	254-3364	2/21/2010	3/4/2010	3/4/2010			3/4/2010
001-120224-001	R	001-120224-001	Cape, Curt	Maydelle, Jacqueline	254-3364	6/10/2015	6/11/2015	6/11/2015			
001-126427-001	R	001-126427-001	Lihue, Lenny	Prion, Jessica	203-577-1180	4/6/2017	4/20/2017	4/20/2017			
002-142663-001	R	002-142663-001	Lihue, Lenny	Prion, Jessica	203-577-1180	5/23/2014	5/29/2014	5/29/2014			5/30/2014
002-134422-001	R	002-134422-001	Saint, Ellen	Winterset, Peter	525-4309	9/12/2013	9/15/2013	9/15/2013			9/12/2013
001-121209-001	R	001-121209-001	Strasburg, Judy	Cave, John	965-0845	8/10/2015	8/13/2015	8/13/2015			8/12/2015
001-115881-001	R	001-115881-001	Romeoville, Doug			10/16/2014					10/17/2014
001-119306-001	R	001-119306-001	Sierraville, Steve	Wishek, Kay		4/18/2015		5/24/2016			
001-82391-001	R	001-82391-001	Du, David		795-8914	6/21/2009	6/27/2009	6/27/2009			6/21/2009
001-93160-001	R	001-93160-001	Lihue, Terry		904-9076	2/25/2011	2/27/2011	2/27/2011			12/4/2011
002-108861-002	R	002-108861-002	Saint, Neil	Selman, Vicki	436-2699	3/4/2011	3/11/2011	3/11/2011			3/13/2011
001-108226-001	R	001-108226-001	Currie, Marvin	Van, Betty	698-5210	7/31/2013	8/4/2013	8/4/2013			9/26/2013
001-83254-001	R	001-83254-001	Yutan, Tim			7/29/2009					7/29/2009
001-86961-001	R	001-86961-001	Kaiser, Kathy		859-4916	2/24/2010	2/27/2010	2/27/2010			2/25/2010
001-85106-001	R	001-85106-001	Chatom, Nancy	Waller, Paul	275-2286	11/15/2009	11/15/2009	11/15/2009			11/15/2009
001-123420-001	R	001-123420-001	Chatom, Nancy	Waller, Paul	275-2286	12/20/2015	12/20/2015	12/20/2015			1/16/2016
001-123758-001	R	001-123758-001	Chatom, Nancy	Waller, Paul	275-2286	1/13/2016	1/16/2016	1/16/2016			1/16/2016
001-92299-001	R	001-92299-001	Camillus, Howard	Vanderpool, Ann		12/23/2010	1/9/2011	1/9/2011			12/26/2010

Fields in the **Repairs/Custom Job** list include:

Job #	The job intake transaction ID.
Type	The type of job it is: repair, custom, etc.
Envelope #	The number on the repair envelope.
Customer	The name of the customer who order the job.
Entered	The date the repair was taken.
Original ETA	The original estimated time of arrival.
Current ETA	The current estimated time of arrival.
Location	The location within the job process of the item.
Express	Whether the job was considered an express job.
Done	When the repair was completed.
Picked Up	When the repaired item was picked up.
Intake Associate	The associate who originally took the order.
Description	A description of the item.

5. Select or double-click on a specific line for more information to edit the repair.



Edit Repair #001-126427-001 Lihue, Lenny (001-00230) 203-577-1180

Describe The Item To Be Repaired

Item Description: (For Customer Receipt) **Total Declared Value: $309.00**

Men's Stainless Steel Watch w/Black Face and Wimmer's Emblem (Item #505-01423)

Declared Value: $309.00

☐ Express Service

Private Notes:

Condition Notes: Like new

Who

☑ Show All Associates

Notify

Item # 001-505-01423

Describe the Tasks to be Performed

Task			Description	Price	Tx
1	SKU		replace battery	$10.00	☐
				$5.00	☐
				Other	
				$15.00	

ETA 4/20/2017

☐ ETA Is Estimated

Done

Picked Up

Canceled

Location:

☐ Price Is Estimated

Subtotal	$15.00
Tax	$0.00
Total	$15.00
Payments	$0.00
Deposit	$0.00
Due At Pickup	$15.00

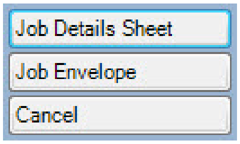
12 of 1134

6. Make changes as needed.
7. Select **OK/Save & Close**.

Notice that these fields are very similar to the **Repair Intake** or **Custom Job Intake** window. See the section entitled Repair Intake or Custom Job Intake for more information about these windows.

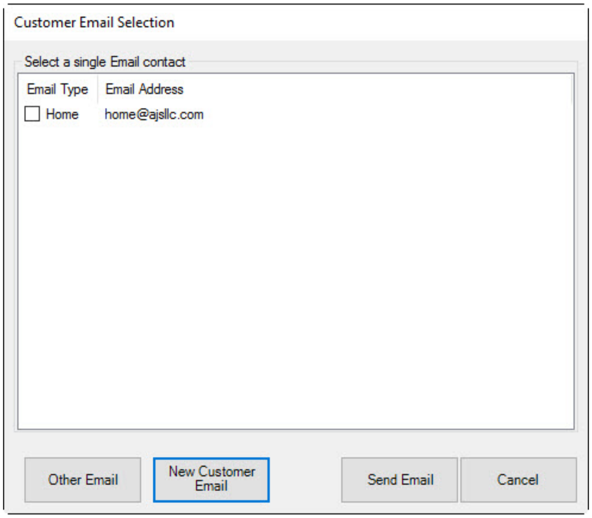
6.1.2 Job Save & Print

On the **Job** window, there is **Save & Print** menu. From here you can print the job details sheet or the job envelope. We recommend you print to the report printer.



Job Details Sheet	A full-page form containing selected details needed for reference. Used in concert with presets, this form can be used in-house, for vendors, or for customers. This sheet can be printed from the preview to the report printer.

	You can send the job details sheet via email. Use this option to preview the job details sheet, and use one of the **Email** button on the lower left portion of the window to generate an email version of the sheet. See the section entitled Configuring Email Settings for Email Receipts and Job Details Sheets for more about configuring email settings. You will be prompted indicate whether cost information should be included.

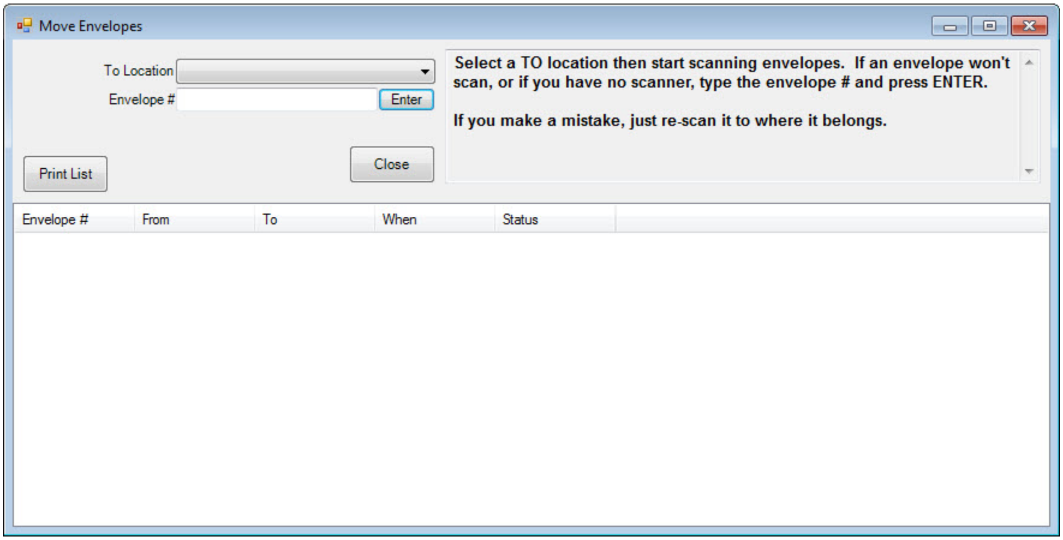


	If you are emailing to the customer, select the correct address. You can use **New Customer Email** to enter a new customer address, which will be saved. If you are emailing to another party, such as an outside repair shop, select **Other Email** and enter an email address for the recipient. This email address will not be saved. For some jobs, those that do not have a customer associated with them, you will be taken directly to entering another email address.
Job Envelope	Used to insert into the item envelope to identify the piece.
Cancel	Cancels out of this menu.

6.1.3 Moving Through the Job Process

Essential to the repair and custom job processes is the ability to track the location of each job in the process. The Edge provides a **Move** function to update the system's knowledge of where each envelope is located. You must have supervisor status to move a repair from one location or envelope to another. To do so:

1. Select **Move Envelope** from the **Services** menu. The **Move Envelopes** window will appear.



Select a TO location then start scanning envelopes. If an envelope won't scan, or if you have no scanner, type the envelope # and press ENTER.

If you make a mistake, just re-scan it to where it belongs.

2. Select a location to which the job should be moved from the **To Location** drop-down menu.
3. Scan the barcode of the envelope or enter it manually via the keyboard and press **Enter**.
4. The updated information should appear in the data portion of the window. Review the information to ensure that it is correct.
5. Enter additional moved custom jobs if applicable.
6. To print the list of moved repairs, select **Print List…**.
7. To close the list when you have finished reviewing it, select **Close**. The job records will record the new locations.

You can move a number of envelopes by completing these fields once and then scanning each envelope in succession.

6.2 Special Orders

6.2.1 Special Order Overview

In The Edge, special orders are a three-part process:

1. Initial intake at point of sale.
2. Receiving special order merchandise into inventory and matching it to the open order
3. Final pickup at point of sale.

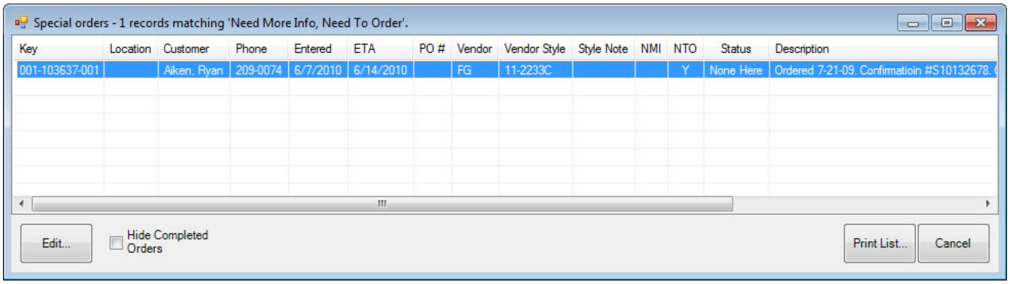
Steps 1 and 3 are common customer service activities and detailed in the sections entitled Special Order Intake and Special Order Pickup. Step number 2 is detailed in the section entitled Receiving Special Order Inventory.

- **Special orders are not recorded as sales until time of pickup.**
- **Commission is not rewarded on a special order until pickup.**
- **Special orders cannot be picked up until they are filled (readied for pickup).**
- **When you attempt to pick up a special order but the pickup button is not lit, this is because the order has not been filled with an item.**
- **Inventory ordered as part of a special order is treated differently as it pertains to the aging process and the Levels feature. For example, a special order item is often in your possession for a short period of time until it is picked up. This should not be confused with being a fast-seller.**

6.2.2 Editing Existing Special Orders

Sometimes it may be necessary to update a special order after the initial intake. To update or modify an existing special order:

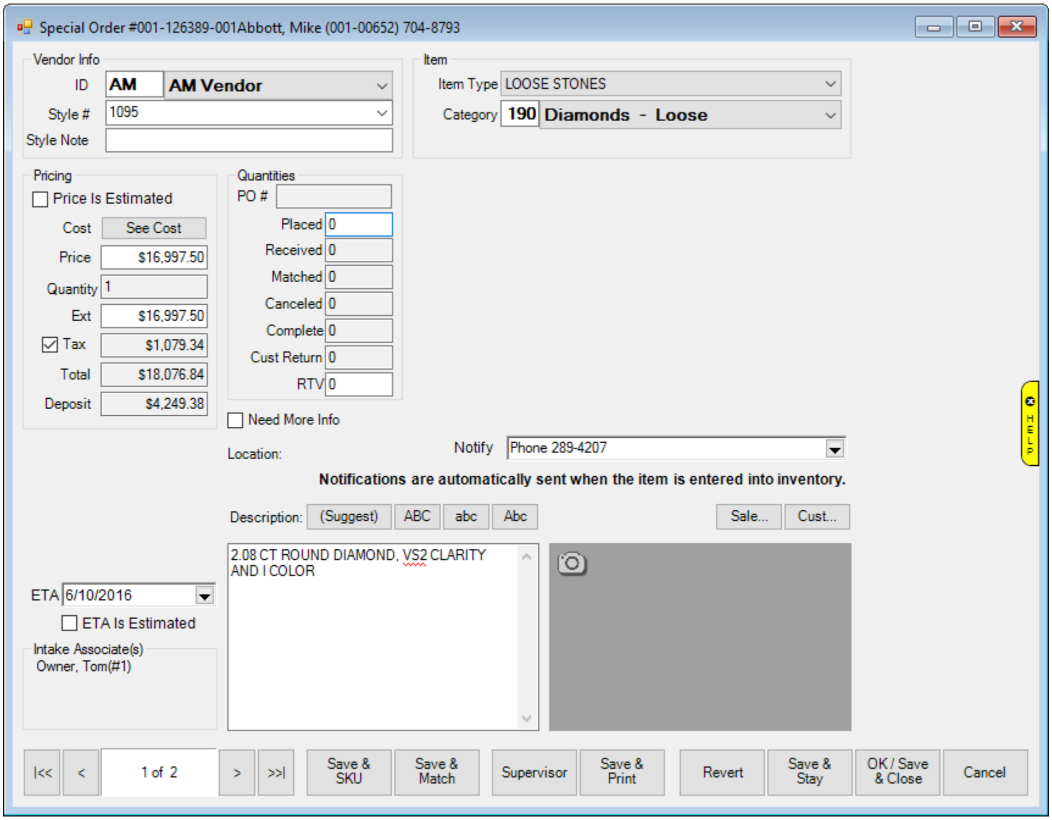
1. From The Edge **Main Menu**, select **Services** ► **Find** ► **Special Order**.
2. The **Find Special Orders** window will appear.
3. Enter criteria here to search for your special order and select **OK**.
4. Any special orders that matched your search criteria will appear in the list:



Special orders - 1 records matching 'Need More Info, Need To Order'.

Key	Location	Customer	Phone	Entered	ETA	PO #	Vendor	Vendor Style	Style Note	NMI	NTO	Status	Description
001-103637-001		Aiken, Ryan	209-0074	6/7/2010	6/14/2010		FG	11-2233C			Y	None Here	Ordered 7-21-09. Confirmatioin #S10132678.

5. Double click on or highlight the desired record and select **Edit**. The special order record will appear.



Special Order #001-126389-001Abbott, Mike (001-00652) 704-8793

Vendor Info

ID: AM AM Vendor

Style #: 1095

Style Note:

Item

Item Type: LOOSE STONES

Category: 190 Diamonds - Loose

Pricing

☐ Price Is Estimated

Cost: See Cost

Price: $16,997.50

Quantity: 1

Ext: $16,997.50

☑ Tax: $1,079.34

Total: $18,076.84

Deposit: $4,249.38

Quantities

PO #:

Placed: 0

Received: 0

Matched: 0

Canceled: 0

Complete: 0

Cust Return: 0

RTV: 0

☐ Need More Info

Location:

Notify: Phone 289-4207

Notifications are automatically sent when the item is entered into inventory.

Description: 2.08 CT ROUND DIAMOND, VS2 CLARITY AND I COLOR

ETA: 6/10/2016

☐ ETA Is Estimated

Intake Associate(s)
Owner, Tom(#1)

Fields and options in the **Edit Special Order** window are similar to those in the **Special Order Intake** window with the addition of the following **Quantities** fields:

PO#	The purchase order number associated with the order.
Placed	The quantity placed on order with the vendor. If you use this field, manual matching will be required when the order is received. We recommend you use the **Purchase Order** feature to record and track vendor orders.
Received	The quantity received.
Matched	The quantity received and matched with the order.
Canceled	The quantity canceled from a vendor order.
Complete	The quantity complete.
Cust Return	The quantity the customer returned to the store.
RTV	The quantity you returned to the vendor.

6. Make any necessary changes and select **OK/Save & Close** to save them.

6.2.3 Receiving Special Order Inventory

Before a special order will be available for final pickup, it must have an item received and matched to it to fulfill the order.

It is impossible to pick up a special order unless an inventory item has been matched to it.

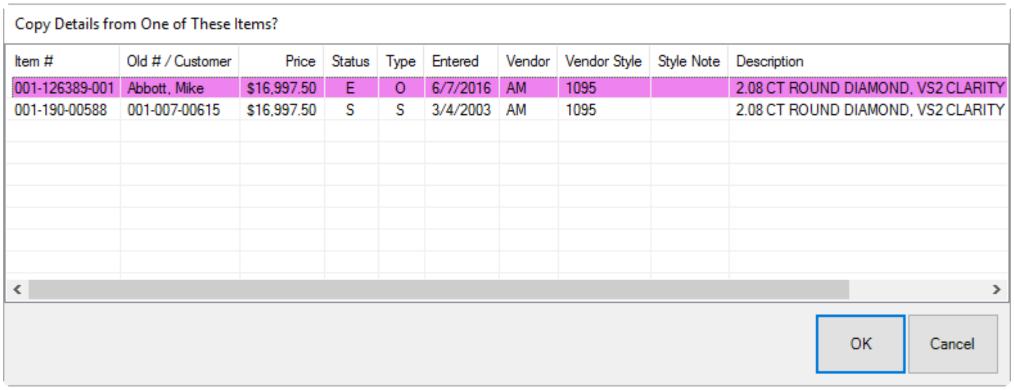
There are two ways to match an item to a special order: **Automatic Matching** and **Manual Matching**. In either case, once the special order item arrives at the store, it should be added into inventory just like any other item through **Inventory** ▶ **Items** ▶ **Add**.

6.2.3.1 Automatic Special Order Matching

Whenever the user enters incoming inventory into the system, The Edge searches the special order table for items that match the vendor ID and vendor style number. If there is a match, the user will be prompted to indicate the item's disposition. Because multiple quantities are possible, the allocation window requests the number of items to be allocated to each special order and to each store in the system. If the user allocates the inventory to a special order, then the item is entered as inventory type O for special order, and is marked as being sold to the customer in question. This method is referred to as automatic because it will happen automatically when the special order item is entered into inventory.

To use automatic special order matching, it is necessary to provide the exact vendor and vendor style information on the special order.

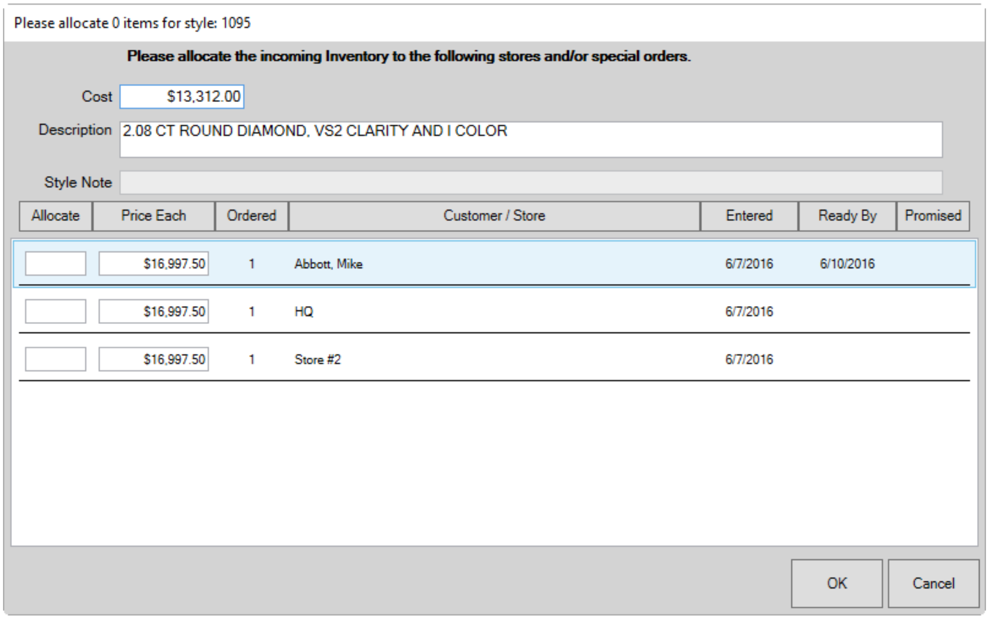
1. Select **Inventory** ▶ **Items** ▶ **Add** and select **Items**.
2. Enter the vendor and style number. If there are matching items, you will be prompted to copy details. If one matches a special order, it will be highlighted in purple.



Copy Details from One of These Items?

Item #	Old # / Customer	Price	Status	Type	Entered	Vendor	Vendor Style	Style Note	Description
001-126389-001	Abbott, Mike	$16,997.50	E	O	6/7/2016	AM	1095		2.08 CT ROUND DIAMOND, VS2 CLARITY
001-190-00588	001-007-00615	$16,997.50	S	S	3/4/2003	AM	1095		2.08 CT ROUND DIAMOND, VS2 CLARITY

3. Select the desired item. The **Allocate** window will appear.



Please allocate 0 items for style: 1095

Please allocate the incoming Inventory to the following stores and/or special orders.

Cost: $13,312.00

Description: 2.08 CT ROUND DIAMOND, VS2 CLARITY AND I COLOR

Style Note:

Allocate	Price Each	Ordered	Customer / Store	Entered	Ready By	Promised
	$16,997.50	1	Abbott, Mike	6/7/2016	6/10/2016	
	$16,997.50	1	HQ	6/7/2016		
	$16,997.50	1	Store #2	6/7/2016		

4. Enter a `1` in the allocate column next to the desired special order source.
5. Select **OK** to this window. A new window will open offering to copy the item details from the special order to this new inventory record. Do so.
6. Finish entering the item.

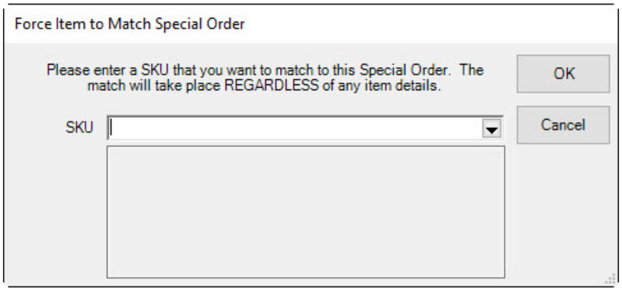
6.2.3.2 Manual Special Order Matching

This method allows you to manually link an item to a special order. Before proceeding, please make sure the item has been entered into inventory. This method should be used if:

- Automatic matching failed to work
- Item already in inventory and not applicable to automatic matching
- The wrong item was matched, and it is necessary to unmatch and match correct item.

To manually match an item:

1. Select **Services** ► **Find** ► **Special Order**. The **Find Special Orders** filter will appear.
2. Enter criteria here to search for your special order and select **OK**. A window will appear listing special orders matching your search criteria.
3. Double click on the special order to open it.
4. Select **Save & SKU**. The **Force Item to Match Special Order** window will appear.



Force Item to Match Special Order

Please enter a SKU that you want to match to this Special Order. The match will take place REGARDLESS of any item details.

SKU

5. Enter the item SKU here or use the drop-down menu to search for the item in inventory.
6. Select **OK**.
7. Select **OK/Save & Close** to save the special order record.

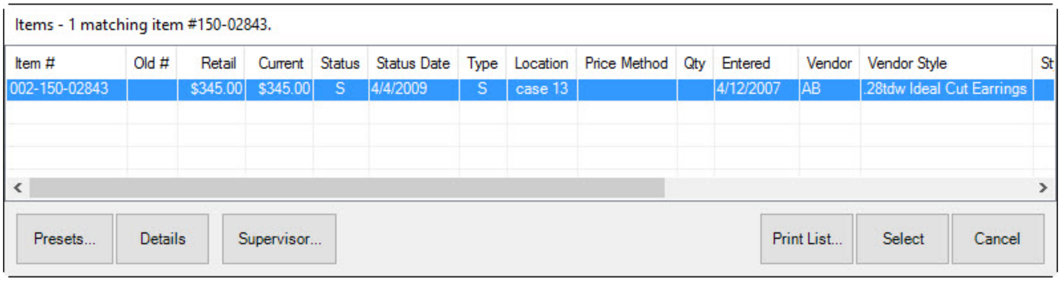
6.2.3.3 Reconciling Special Orders

If for some reason a user did not allocate entered inventory to outstanding special orders, or if existing inventory could have been used to avoid a special order but a special order was entered anyway, a special order record can be matched against existing inventory. To find a special order item in inventory:

1. Select **Services** ► **Find** ► **Special Order**.
2. Select **Details**. The **Special Order** window will appear.
3. Select **Save & Match** from the **Record Navigation Bar**, and a list of matching inventory items will appear. Alternatively, you can locate a record by SKU by selecting **Save & SKU**.
4. Select the items you wish to allocate to the special order up to the quantity not yet allocated.
5. Select **OK**.

6.2.3.4 Unmatching a Special Order Item

1. Select **Services** ► **Special Order** ► **Find**. The **Find Special Orders** filter will appear.
2. Enter criteria here to search for your special order and select **OK**. A window will appear listing special orders matching your search criteria. Double click on the special order to open it.
3. Select **Save & Match**. The **Items Matching Special Order** window will list any in stock inventory matching the vendor and vendor style on this order.



Items - 1 matching item #150-02843.

Item #	Old #	Retail	Current	Status	Status Date	Type	Location	Price Method	Qty	Entered	Vendor	Vendor Style	St
002-150-02843		$345.00	$345.00	S	4/4/2009	S	case 13			4/12/2007	AB	28tdw Ideal Cut Earrings	

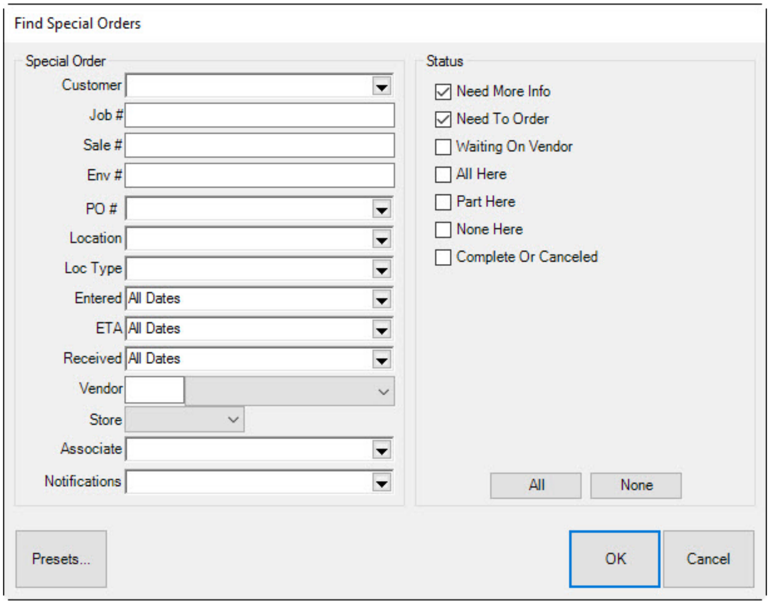
If an item is already matched to this order, it will have a check next to it.

4. Uncheck the item and select **OK**.

6.2.4 Finding a Special Order Transaction

To check on the status of a special order:

1. Select **Services ► Find ► Special Order**. The **Find Special Orders** window will appear.



Find Special Orders

Entered: All Dates
ETA: All Dates
Received: All Dates

☑ Need More Info
☑ Need To Order
☐ Waiting On Vendor
☐ All Here
☐ Part Here
☐ None Here
☐ Complete Or Canceled

Fields and options in the **Find Special Orders** window include:

Customer	Returns records containing the customer selected using the **Customer Find** process offered in the drop-down list.
Job #	Returns records matching the ID number for the special order transaction.
Sale #	Returns records matching the ID for the sales transaction that contains the special order.
Env #	Returns records matching the ID for the job envelope.
PO #	Returns records matching the specified purchase order number.
Location	Returns records matching the specified location.
Location Type	Returns records matching the specified location type.
Entered	Returns records matching the date the special order was placed. Note the default is **All Dates**.

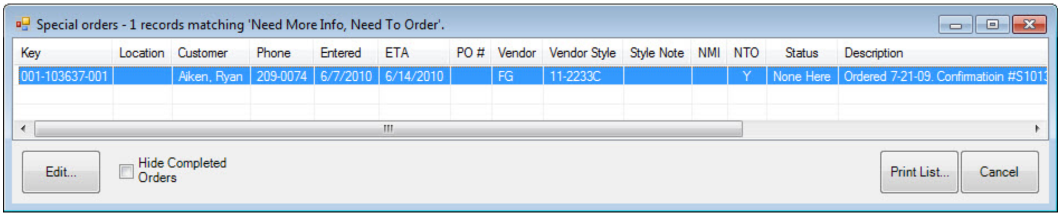
ETA	Returns records matching the estimated time of arrival indicated. Note the default is **All Dates**.
Received	Returns records with matching dates the item was received in the store.
Vendor	Returns records matching the entered or selected vendor ID.
Store #	Returns records with matching receiving store numbers.
Associate	Returns records with matching intake associate.
Notifications	Returns records with notifications created or completed on a specified date.
Status	Returns records that return any of the following statuses:

- **Need More Info**
- **Need to Order**
- **Waiting on Vendor**
- **All Here**
- **Part Here**
- **Complete or Canceled.**

2. Complete **Find Special Orders** fields as needed to retrieve the appropriate data.

When using the special order find filter, at least one status box must be selected to perform a search.

3. Select **OK**. A list of special orders matching the criteria will appear.



Special orders - 1 records matching 'Need More Info, Need To Order'.

Key	Location	Customer	Phone	Entered	ETA	PO #	Vendor	Vendor Style	Style Note	NMI	NTO	Status	Description
001-103637-001		Aiken, Ryan	209-0074	6/7/2010	6/14/2010		FG	11-2233C			Y	None Here	Ordered 7-21-09. Confirmatioin #S101

☐ Hide Completed Orders

Fields in the **Special Orders** list include:

Key	The special order ID.
Customer	The name of the customer who placed the order.
Phone	The customer's phone number.
Entered	The date the order was taken.
ETA	The estimated time of arrival.
Vendor	The vendor with whom the order was placed.

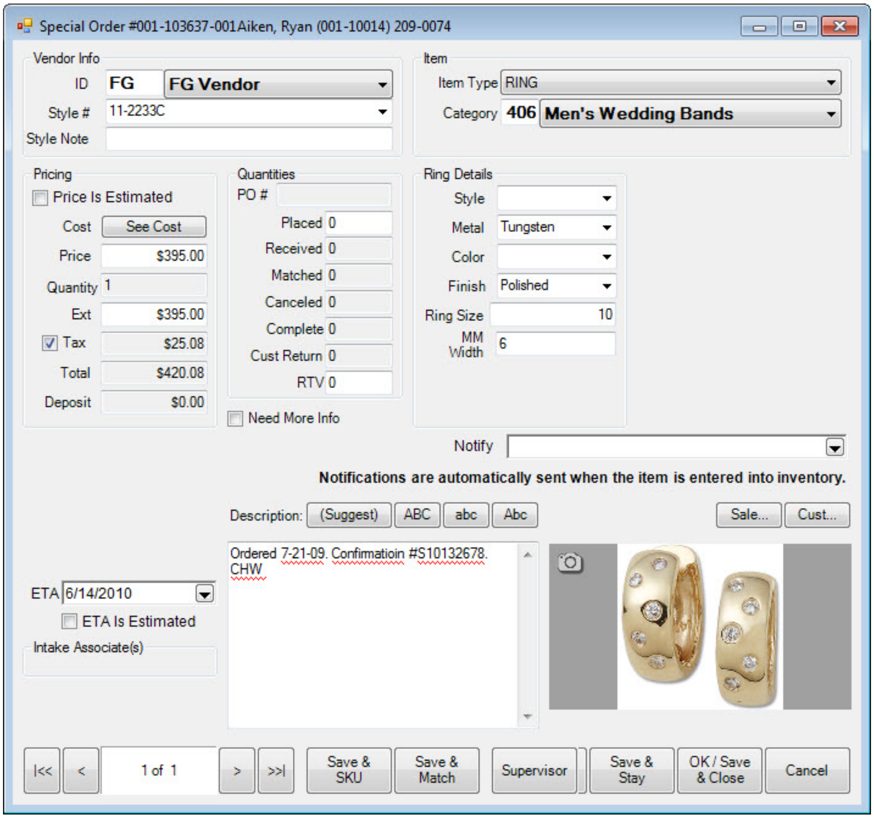
Style	The vendor's style number.
NMI	Whether more information is required.
NTO	Whether the item has yet to be ordered. The item is considered ordered once a PO (purchase order) number has been saved in the record.
Status	Whether any or all of the order has arrived in the store.
Desc	A description of the item.
Hide Completed Orders	Whether this list should include orders that have been completed and picked up by the customer.

4. Select the specific line for more information or to edit the special order.
5. To print the entire list of matching special orders, select **Print List…**.
6. To close the list when you have finished reviewing it, select **Close**.

6.2.5 Editing Special Orders

To edit a special order record:

1. Find the record as described above.
2. Select the desired record and select **Details**. The **Special Order** window will appear.



Special Order #001-103637-001Aiken, Ryan (001-10014) 209-0074

Vendor Info

ID FG FG Vendor

Style # 11-2233C

Style Note

Item

Item Type RING

Category 406 Men's Wedding Bands

Pricing

☐ Price Is Estimated

Cost See Cost

Price $395.00

Quantity 1

Ext $395.00

☑ Tax $25.08

Total $420.08

Deposit $0.00

Quantities

PO #

Placed 0

Received 0

Matched 0

Canceled 0

Complete 0

Cust Return 0

RTV 0

☐ Need More Info

Ring Details

Style

Metal Tungsten

Color

Finish Polished

Ring Size 10

MM Width 6

Notify

Notifications are automatically sent when the item is entered into inventory.

Ordered 7-21-09. Confimatioin #S10132678. CHW

ETA 6/14/2010

☐ ETA Is Estimated

Intake Associate(s)

Fields and options in the **Special Order** window include:

Vendor Info

ID	The vendor ID.
Style #	The vendor’s style number.

Item

Item Type	The item type.
Category	The category ID for the item.

Pricing

Price is Estimated	Whether the price is estimated.
Cost	Cost to the store for the item.
Price	Price to the customer for the item.
Quantity	The number requested. Note that this cannot be changed once entered at intake.

Ext	Quantity times subtotal.
Tax	Whether tax should be applied. The amount will be calculated.
Total	The total due.
Deposit	The amount required as a deposit.
Quantities	
PO	Represents the number of items that you have ordered from the vendor. This is the only field that affects the system's knowledge of whether the item has been ordered.
Received	The number received in the store.
Matched	The number that matched the customer's request.
Canceled	The number canceled.
Complete	The number of items in the order that are complete.
Cust Return	The number of items in the order that the customer returned.
RTV	The number of items returned to the vendor.
Need More Info	Whether more information about the item is required to complete the order.
Price Estimate	
To Be Determined	Indicates that the price is to be determined by the cost or other input.
Call Before Starting	Indicates that the customer wants to know an exact price before the order should be placed.
Do Not Exceed	Indicates that the customer does not want the item if it exceeds this amount.
Description	Description of the item.
ETA	Estimated time of arrival.
ETA is Estimated	Indicates that the ETA is estimated.

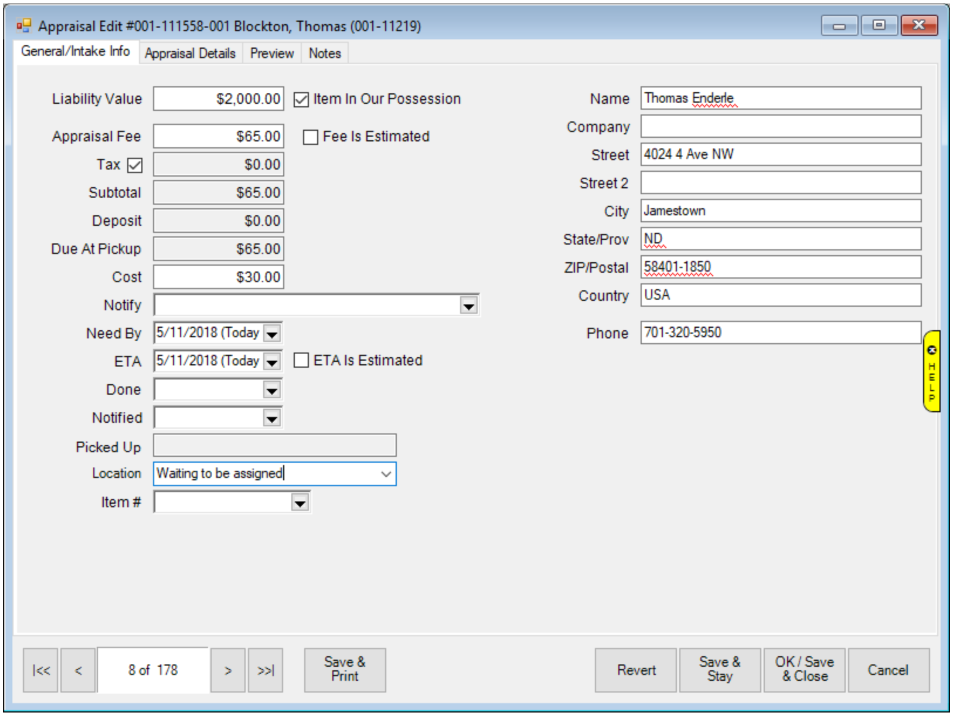
3. Edit the record as desired and select the appropriate save option.

6.3 Appraisals

6.3.1 Finding and Editing an Appraisal Record

To find and manage appraisals:

1. Select **Find ►Appraisal** from the **Services** menu. The **Find Appraisals** window will appear.
2. Filter for the appraisal with which you wish to work.
3. Open the desired appraisal record. The **Appraisal Edit** window will appear with the **General** tab selected.

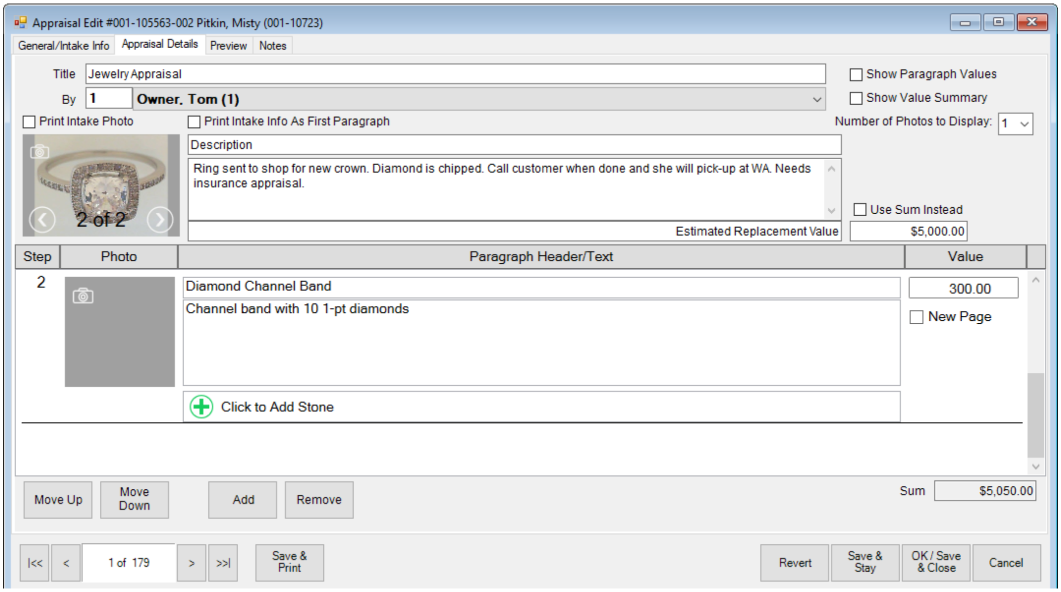


Appraisal Edit #001-111558-001 Blockton, Thomas (001-11219)

Liability Value $2,000.00 ☑ Item In Our Possession
Appraisal Fee $65.00 ☐ Fee Is Estimated
Tax ☑ $0.00
Subtotal $65.00
Deposit $0.00
Due At Pickup $65.00
Cost $30.00
Notify
Need By 5/11/2018 (Today
ETA 5/11/2018 (Today ☐ ETA Is Estimated
Done
Notified
Picked Up
Location Waiting to be assigned
Item #

Name Thomas Enderle
Company
Street 4024 4 Ave NW
Street 2
City Jamestown
State/Prov ND
ZIP/Postal 58401-1850
Country USA
Phone 701-320-5950

4. Edit fields as needed.
5. Select the **Appraisal Details** tab.



Appraisal Edit #001-105563-002 Pitkin, Misty (001-10723)

Title: Jewelry Appraisal

By: 1 Owner, Tom (1)

☐ Show Paragraph Values

☐ Show Value Summary

☐ Print Intake Photo

☐ Print Intake Info As First Paragraph

Number of Photos to Display: 1

Description

Ring sent to shop for new crown. Diamond is chipped. Call customer when done and she will pick-up at WA. Needs insurance appraisal.

☐ Use Sum Instead

Estimated Replacement Value: $5,000.00

Step	Photo	Paragraph Header/Text	Value
2		Diamond Channel Band Channel band with 10 1-pt diamonds	300.00 ☐ New Page

Click to Add Stone

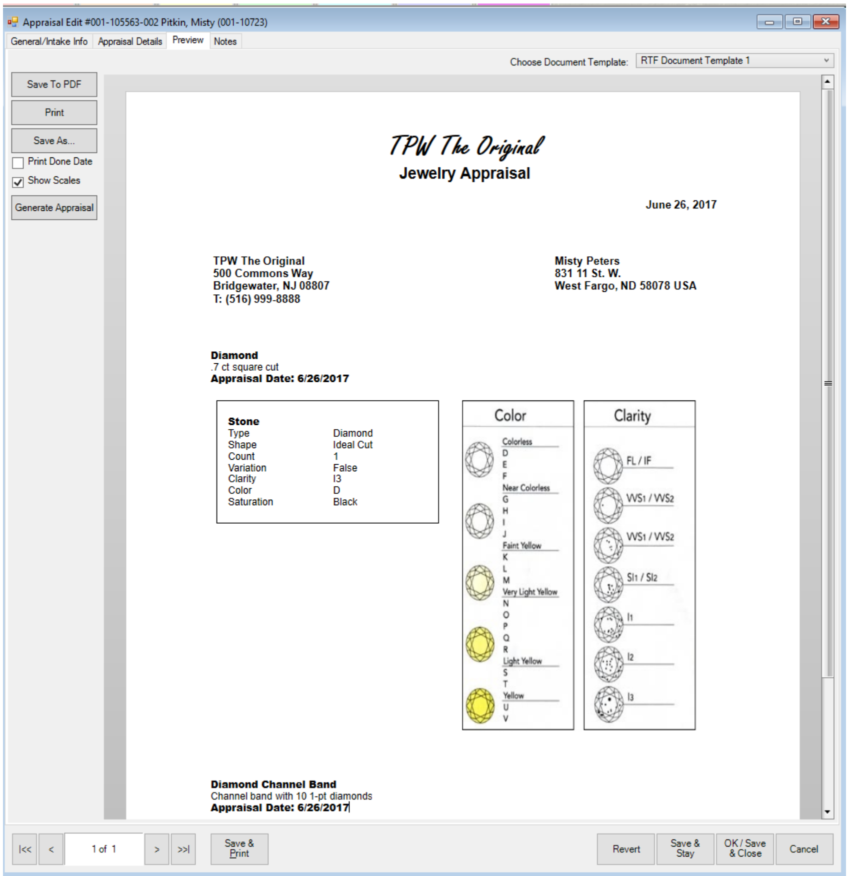
Sum: $5,050.00

Fields and options in the **Appraisal Details** tab include:

Title	The title of the appraisal document.
By	Associate or vendor who will conduct the appraisal.
Show paragraph Values	Show these values on the appraisal document. Must be included for appraisal to show the details of the item.
Show value summary	Show the value summary listing on the appraisal document. Must be included for a total value to appear on the appraisal.
Print Intake Photo	Include the photo taken at intake on the appraisal document.
Print intake info as first paragraph	Include information taken about the item as the first paragraph of the appraisal document.
Photo	Take a photo of the item at this time. See the section entitled Photographing an Item for more information.
Description	The paragraph title to follow on the appraisal document. The following field contains space in which to write the description.
Use Sum Inst	Rather than specifying an appraised value, use the sum of the part values.
Step	Lists the step number listed.
Photo	Shows a photo of the step.
Paragraph Header/Text	The paragraph title and text describing the step.
Value	The value of the step.

New Page	When checked, starts the paragraph on a new page in the generated appraisal document.
Sum	The total value.

6. For each item in the lot, or for each aspect of the item to be described, select **Add**. A line item will appear on the **Appraisal Edit** window.
7. Enter a name for the paragraph.
8. Enter the text describing the item or aspect.
9. Enter the value.
10. Enter as many items or aspects as needed by repeating steps 5 through 9.
11. Rearrange the order in which the paragraphs appear by selecting **Move Up** or **Move Down**.
12. Edit or complete these as desired and select the **Preview** tab.



Choose Document Template: RTF Document Template 1

☐ Print Done Date
☑ Show Scales

TPW The Original
Jewelry Appraisal

June 26, 2017

TPW The Original
500 Commons Way
Bridgewater, NJ 08807
T: (516) 999-8888

Misty Peters
831 11 St. W.
West Fargo, ND 58078 USA

Diamond
.7 ct square cut
Appraisal Date: 6/26/2017

Stone	
Type	Diamond
Shape	Ideal Cut
Count	1
Variation	False
Clarity	I3
Color	D
Saturation	Black

Diamond Channel Band
Channel band with 10 1-pt diamonds
Appraisal Date: 6/26/2017

The **Preview** tab shows an approximate print preview of the appraisal. The Edge comes loaded with five appraisal templates, one default and four alternates. Based on the locations you set in **System**

Options, your chosen default template will be used automatically. Other available templates will appear in the drop-down menu.

Options in the **Preview** tab include:

Choose Document Template	Select the desired appraisal template, if not the default. If you do not see a list of templates, check your **System Options**; there should be a value in **Appraisal Template Folder Location**.
Save to PDF	Save the appraisal as it appears so far to a PDF file.
Print	Print the appraisal as it appears so far to paper.
Save As	Save the appraisal as an .rtf.
Print Done Date	When printing, The Edge can print the current date on the appraisal or the date the appraisal was completed. This option indicates that you want the completion date printed.
Show Scales	If there is a diamond, the appraisal will include a graphical guide of color and clarity for reference.
Generate Appraisal	Refreshes the preview to reflect changes in settings.

13. To select a different appraisal template, select one from the **Choose Document Template** drop-down menu. Note that if you are editing an existing appraisal, the template you used before will be used unless you select a different one.
14. Select the appropriate save option from the **Record Navigation Bar**.
15. To see a preview of the actual printout, select **Print Preview**.
16. To retain the appraisal completion date on the printed copy, select **Print Done Date**. Otherwise, the current date will appear.
17. To print the document, select **Print** from the **Preview** tab. We recommend printing to the report printer.
18. Use the **Notes** tab to record any unofficial information about the appraisal or the pieces included in it.

6.3.2 Editing Appraisal Templates

If you wish, it is possible to edit these templates or create new ones from an old one and make changes to that. To do so:

1. Use Windows Explorer or Windows File Manager and browse to The Edge folder where the templates are kept. See your **System Options** to locate that path.
2. Open the file with Microsoft® Word or another .rtf editor.
3. Save the template under a new name, if you wish to create a new template.
4. Make changes to the template and save it. You can change the location of text, add new text, and change font size and type. You can add text and some design elements. Feel free to work with the design and test it in The Edge.

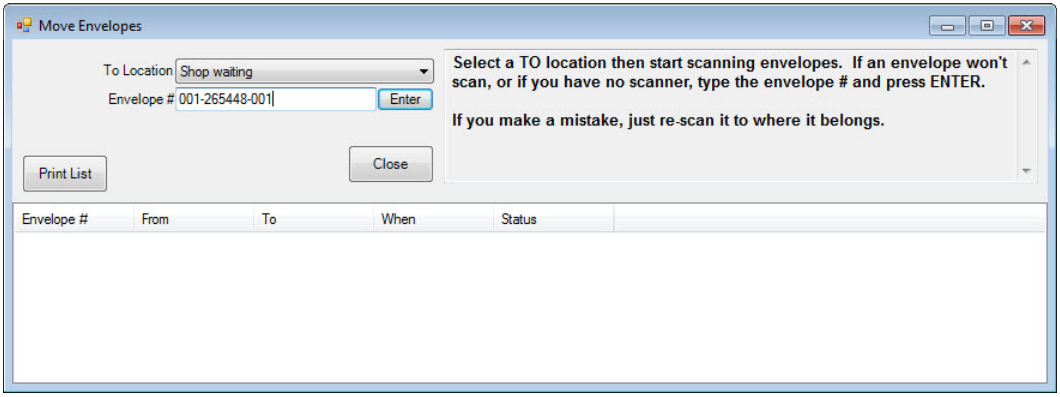
- **Notice that there are merge fields built into the template. They are delineated by brackets ({mergefield}). If you delete one of these fields, that data will not show in the generated appraisal.**
- **If the file is open in your .rtf editor and you try to use the Preview Appraisal function, The Edge will give an error.**

6.4 Job Tracking

While working on a piece, it is necessary to track progress and organize the parts. Therefore, these processes offer a job details sheet that can be inserted into the envelope. To obtain a job envelope, select **Save & Print** from the **Item** window; it can either be the job details sheet or the item details. You can send the job details sheet to customers via email. See the section entitled Job Save & Print for details.

Then, using the **Move Envelope**, you can track the location of a job. To move a job as it moves through processing:

1. Go to **Services** ► **Move Envelope**. There are **System Options** that may require **Who** information concerning who performed the change. The **Move Envelopes** window will appear.



Move Envelopes

To Location: Shop waiting

Envelope #: 001-265448-001

Select a TO location then start scanning envelopes. If an envelope won't scan, or if you have no scanner, type the envelope # and press ENTER.

If you make a mistake, just re-scan it to where it belongs.

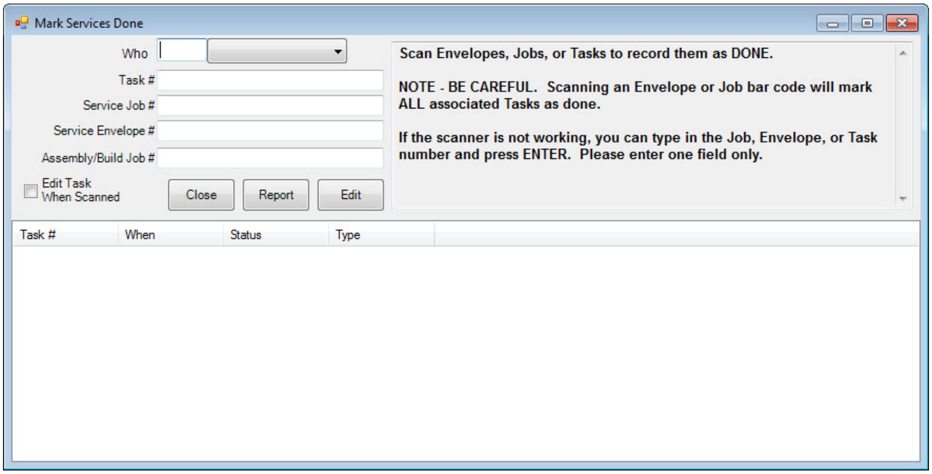
Envelope #	From	To	When	Status

2. Select the location to which you want the item to be moved.
3. Scan the envelope or enter the envelope number.
4. The item record will reflect the new location.
5. Any notifications associated with the change will be sent; if the notification is a success, it will appear in the status window in blue. If it fails, it will be shown in red.

6.5 Completing the Job

While working on a piece, it is necessary to track progress and organize the parts. Therefore, these processes offer a job details sheet that can be inserted into the envelope. To obtain a job envelope, select **Save & Print** from the **Item** window; it can either be the job details sheet or the item details. By default, it will print to the report printer. You can send the job details sheet to customers via email. See the section entitled Job Save & Print for details. Then, using the **Done**, you can track the location of a job. This is important if you're using **System Options** that require an item to be marked done before it can be picked up. To mark a job as complete:

1. Select **Done** from the **Services** menu.
2. The **Mark Services Done** window will appear.



Scan Envelopes, Jobs, or Tasks to record them as DONE.

NOTE - BE CAREFUL. Scanning an Envelope or Job bar code will mark ALL associated Tasks as done.

If the scanner is not working, you can type in the Job, Envelope, or Task number and press ENTER. Please enter one field only.

Scanning an envelope or service job barcode will prompt you to confirm which of the tasks in the job to mark done. Check System Options to set actions and prompts.

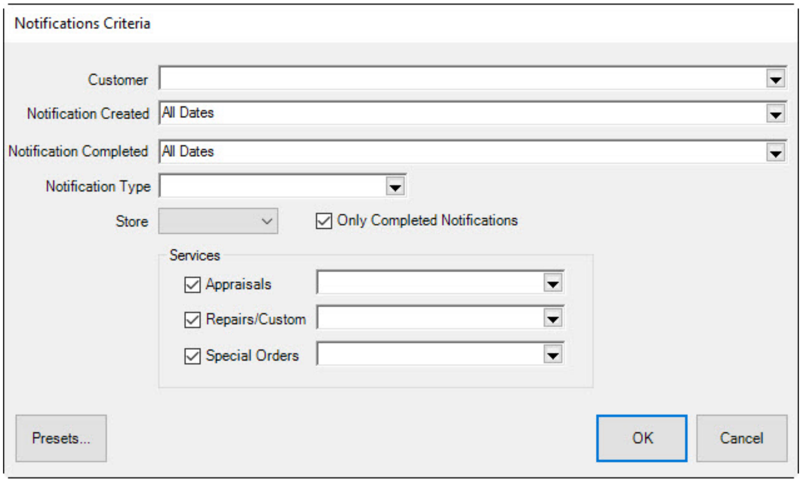
3. Scan the envelope number, repair number, or task number or enter them manually.
4. To edit the task, select **Edit Task when Scanned**. Thereafter, every time you scan to indicate a task was completed, a **Task Edit** window will appear.
5. As items are scanned or typed in, the updated information should appear in the data window of the window. Review the information to ensure that it is correct.
6. Enter additional completed repairs if applicable.
7. When finished, select **Report** to generate a report of completed repairs.
8. To close the list when you have finished reviewing it, select **Close**.

You can mark a number of envelopes as complete by completing these fields once and then scanning each envelope in succession.

6.6 Service Job Notifications

If you wish to locate a job based on a notification sent to a customer:

1. From the **Services** menu, select **Notifications** ► **Find**. The **Notifications Criteria** window will appear.



Notification Created: All Dates
Notification Completed: All Dates
☑ Only Completed Notifications
☑ Appraisals
☑ Repairs/Custom
☑ Special Orders

Fields and options in the **Notifications Criteria** window include:

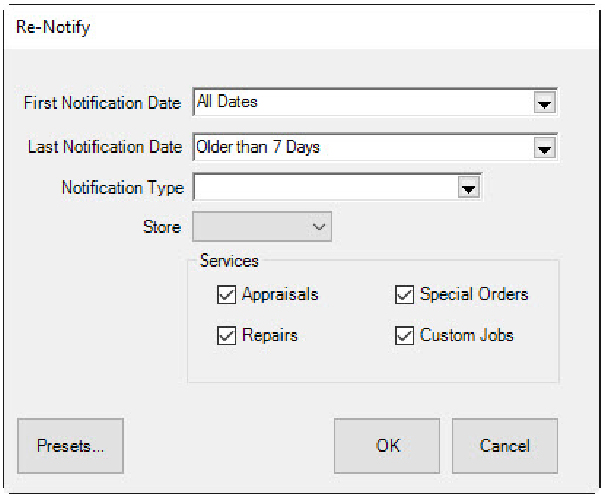
Customer	Returns job records containing notifications sent to a customer specified using the **Customer Find** filter.
Notification Created	Returns job records containing notifications created in the specified date range.
Notification Completed	Returns job records containing notifications completed in the specified date range.
Notification Type	Returns job records containing notifications of a specified type such as email or text message.
Store	Returns job records containing notifications created at the specified store.
Only Completed Notifications	Returns jobs for which a notification was successfully sent.
Services	Returns job records containing notifications pertaining to a particular appraisal, repair/custom job, or special order. For each of these categories, you can do a job find to narrow the results further.

2. Complete the fields as desired and select **OK**. The **Notifications Matching** list view will appear. Work with the jobs as needed.

6.6.1 Resending Service Job Notifications

Notifications can be resent on a case-by-case basis from the job record **Supervisor** menu. However, if you wish to resend notifications to many customers concerning a services such as custom jobs, repairs, appraisals, or special orders:

1. From the **Services** menu, select **Notifications** ► **Re-Notify**. The **Re-Notify** filter will appear.



Re-Notify

First Notification Date: All Dates

Last Notification Date: Older than 7 Days

Notification Type:

Store:

Services

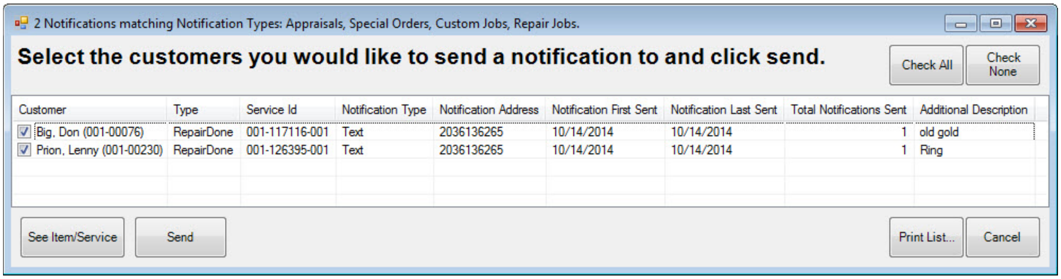
☑ Appraisals ☑ Special Orders

☑ Repairs ☑ Custom Jobs

Filters and options in the **Re-Notify** filter include:

First Notification Date	Returns records with the selected initial notification date.
Last Notification Date	Returns records with the selected last notification date.
Notification Type	Returns records with notifications that were of the specified type: • `Email` • `Phone` • `Text.`
Store	Returns records with notifications sent from the specified store.
Services	Returns records of notifications of the specified services: • `Appraisals` • `Special Orders` • `Repairs` • `Custom Jobs.`

2. Make filter selections and select **OK**. A list of matching records will appear.



2 Notifications matching Notification Types: Appraisals, Special Orders, Custom Jobs, Repair Jobs.

Select the customers you would like to send a notification to and click send.

Customer	Type	Service Id	Notification Type	Notification Address	Notification First Sent	Notification Last Sent	Total Notifications Sent	Additional Description
☑ Big, Don (001-00076)	RepairDone	001-117116-001	Text	2036136265	10/14/2014	10/14/2014	1	old gold
☑ Prion, Lenny (001-00230)	RepairDone	001-126395-001	Text	2036136265	10/14/2014	10/14/2014	1	Ring

3. Check the records you wish to re-send, and select **Send**. The notification will be sent and the record will be updated to reflect the last notification sent.

7 Reports

The Edge contains a number of meaningful reports, each of which have unique filters. Once you are familiar with the report filter windows, they will enable you to pick and choose the content of the report. From this panel you can to access the report of your choice. For example, if you want to see how much inventory you have in stock from a given vendor or how many pieces you sold from that vendor, selecting **Inventory** will call up those types of reports. Reports related to customer matters are found from this panel by selecting **Customers**.

For video tutorials concerning reports, see the following links:
Working with Reports: http://www.screencast.com/t/aUmThjGnDUk
Memorized Reports: http://www.screencast.com/t/KYaUAQO58b

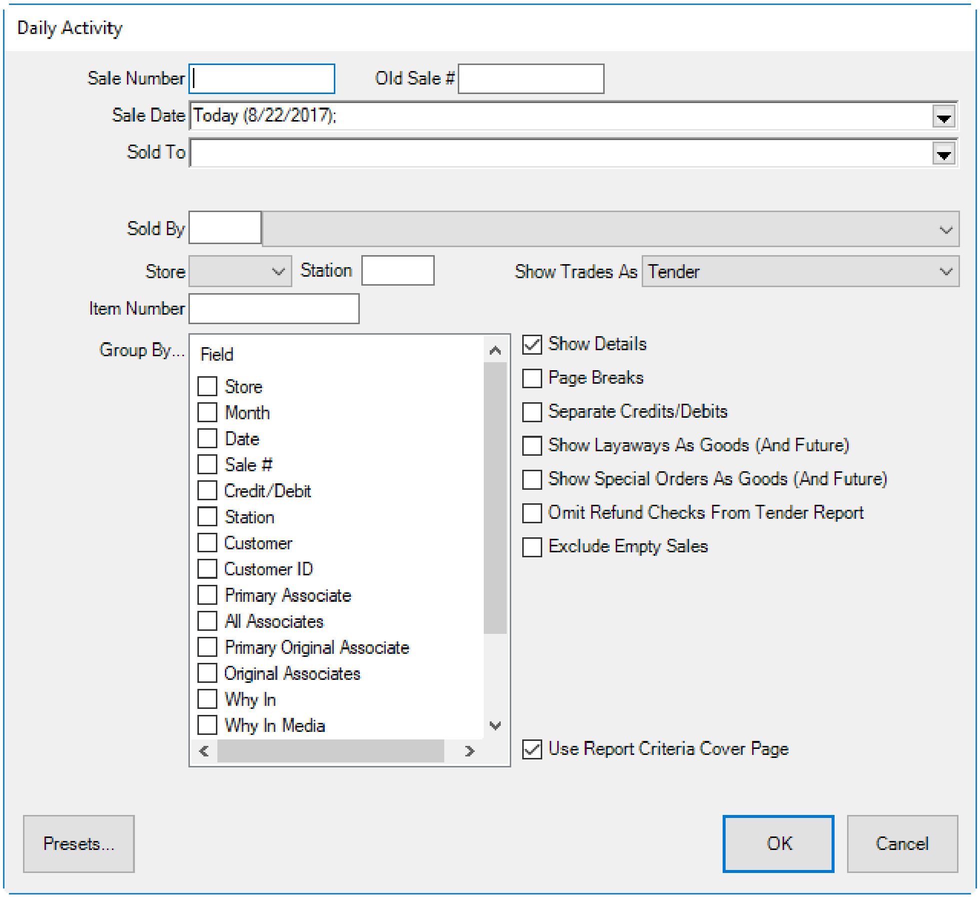
7.1 Creating a Report

In general, to create a report:

1. Select **Reports** from the function menu.
2. From the **Reports** menu, select the category of report. Within each category, there will be common features to the query process. Specific report selections will automatically narrow the parameters by which The Edge will search. Some of the report queries will resemble record queries found in the find item or find customer filters.

Activity	Transaction activity such as daily sales, sales tax, miscellaneous sales activity, trade-ins, returns, timing, tender activity.
Inventory	Inventory status and activity.
Customers	Customer reports such as occasion lists, wish lists, charge balances, thank yous, and transactions by location, demographics, or acquisition.
Management	Performance, advertising, and personnel reports.
Job	Repair/custom job activities.

3. From the category, select the specific desired report. The menu may offer more detailed options. The query option window for that type of report will appear. The following example is for **Activity** reports.



Daily Activity

Sale Date: Today (8/22/2017);

Show Trades As: Tender

☑ Show Details

☐ Page Breaks

☐ Separate Credits/Debits

☐ Show Layaways As Goods (And Future)

☐ Show Special Orders As Goods (And Future)

☐ Omit Refund Checks From Tender Report

☐ Exclude Empty Sales

☑ Use Report Criteria Cover Page

The query options offered here allow you to narrow the report results by various parameters depending on the report type.

Sale Number	Allows you to specify a particular transaction.
Old Sale Number	If you had a previous system, the transaction number as imported into The Edge.
Sale Date	Date or dates that are to be included in the report results. A drop-down list containing a variety of date range options will appear. The default will be the current day's date. In the **Date Range** window, there is a much greater variety of date ranges from which to select. This can be helpful when saving presets that include a period of time. More detail about the selecting dates is contained in the section entitled Filtering by Date.
Sold To	Allows you to narrow to a particular customer range by offering a query window similar to that found in the section entitled Finding a Customer.

)

Sold By	Allows you to specify the ID number of a particular salesperson. Notice the drop-down list that allows you to select from a list.
Store	Allows you to specify a store.
Station	Allows you to specify the station from which transactions occurred.
Show Trades As	Allows you to indicate whether trades should be treated as tender, goods, or something else.
Item Number	Allows you to specify an item number.
Group By….	Allows you to specify how the results will be grouped, if at all. You can only group by up to four groupings. **The order of these options also dictates how the data will be sorted. You can drag and drop these options to reorder the way they will appear in the report. Check the Group By boxes to create groups for subtotaling. Sections are grouped hierarchically. For example, if you group first by store then by date, each store will appear with date groups below. If you put date on top and store next, date groups will appear with all the store groups beneath them.**
Exclude Empty Sales	Allows you to exclude sales that had no financial transaction.
Use Report Criteria Cover Page	Checked by default, can be unchecked to run just this report in this instance without the criteria cover page. For more about the report criteria cover page, see the section entitled Working with Report Results.

4. Select output options from the right side of the screen as desired:
   - Grouping and sorting parameters
   - Whether to show cost
   - Whether to show photos
   - Whether to show short version or long version
   - Whether to show just summaries or include line items
   - Whether to provide a preview of where page breaks will be when printed automatically default on.

5. Select **OK**. The report will appear.

Some reports may take some time to compile. Do not interrupt the task until the report appears.

The Presets function allows you to predefine reports. For example, you could create a series of month-end reports.

7.1.1 Working with Report Results

Cover Page

Depending on your **System Options**, the first page of most reports is the cover page.

Inventory Report: In Stock By Category

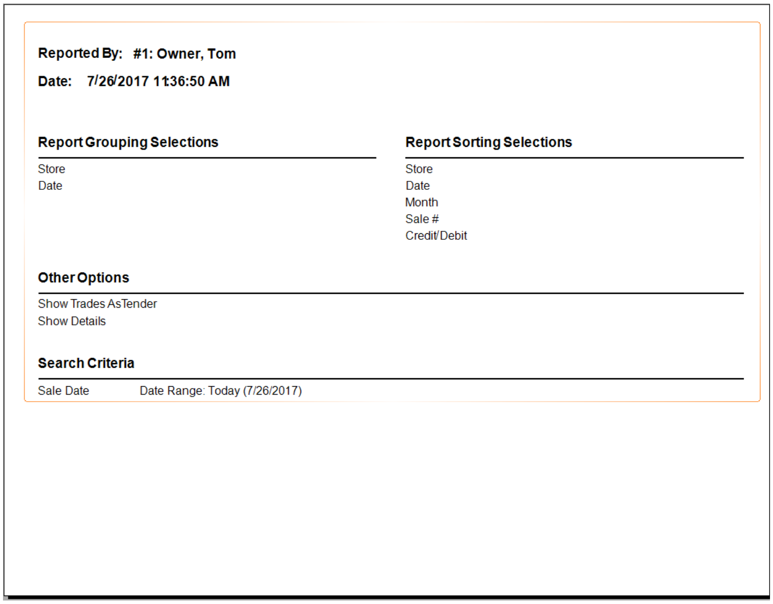
(7/6/2017)

Edge Documentation Demo

The cover page contains the report name, date, and the store.

Criteria Page

The second page of most reports is the criteria page.



Reported By: **#1: Owner, Tom**

Date: **7/26/2017 11:36:50 AM**

Report Grouping Selections	Report Sorting Selections
Store	Store
Date	Date
	Month
	Sale #
	Credit/Debit

Other Options

Show Trades As Tender

Show Details

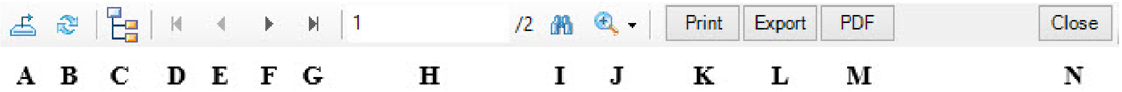
Search Criteria

Sale Date	Date Range: Today (7/26/2017)

The criteria page lists who ran the report and the date along with selections for sorting, grouping, options, and search criteria. This page will vary greatly depending on the report and the options you selected.

Report Toolbar

Each report is presented with a toolbar at the top of the window.



A	Export the report in a variety of formats. This data can include CSV files, RTF files, and various XLS files. If you select the data-only option, the file will not include report-style formatting. This option can be enabled in **System Options**.
B	Refresh the report.
C	Toggle the Group Pane, which shows a tree view of the report results for easier navigation.
D	Go to the first page of the report.
E	Go to the previous page of the report.
F	Go to the next page of the report.
G	Go to the last page of the report.
H	Go to a specific page of the report.
I	Find a text string in the report.
J	Adjust the zoom.
K	Print the report. This will bring up the Windows print dialog. Use it to set your printing options, including options to print a page range that might exclude the report cover or criteria page.
L	Export the report to a text file
M	Create a PDF version of the report.
N	Close current report view.

Report Links

Many report output fields include hyperlink functionality. For example, from the report window, select the item number or customer name and the item or customer record will open.

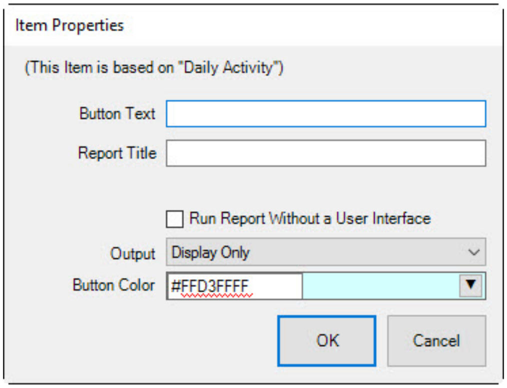
Specific Reports

The following sections describe more about completing a report query window for the various types of reports and describe the expected results.

7.2 Memorizing Reports

The Edge Memorized Reports feature allows you to create a direct button for reports with commonly used presets. They differ from running reports using presets in that it actually creates a new report button that can be placed anywhere on the **Reports** menu. Memorized reports can be created from the **Presets** menu on any report filter. Once they are created, you can manage them from the **Administrative** menu. And you can even run a group of reports together from a single button. To memorize a report:

1. From the **Reports** window, select the report that best models the report you wish to memorize.
2. Enter report parameters as you would for any report.
3. Do not select **OK** to run the report; select **Presets** from the lower left corner of the window.
4. From the **Presets** menu, select **Memorize Report**. You will be prompted to add a report title and text for the report tab as it will appear in the **Reports** window.



Item Properties

(This Item is based on "Daily Activity")

Button Text:

Report Title:

☐ Run Report Without a User Interface

Output: Display Only

Button Color: #FFD3FFFF

5. Enter the data as prompted.
6. If you wish to run this report the future without any manual prompting, select **Run Report without a User Interface**. It will run using the memorized options without offering the **Report** filter.
7. From the **Output** drop-down menu, select the format for output:
   - `Display Only`
   - `PDF Only`
   - `PDF & Display`.

   PDF output will be sent to the folder specified in **Configuration Options**.

If a location is not defined in Configuration Options, The Edge will create a PDF folder in the Shared Folder and update your Configuration Options.

8. Select **OK.**

Once the report is memorized, you can run it just as you would any other.

7.2.1 Changing the Criteria of a Memorized Report

To change a memorized report:

1. Be sure the **Run Report without a User Interface** option is not turned on.
2. In the **Reports** menu, find and select the memorized report to be changed.
3. When the report filter appears, make changes as required.
4. Do not select **OK** to run the report. Select **Presets ► Set as Default**.
5. Select **OK** if you wish to run the report.
6. If desired, re-enable the **Run Report without a User Interface** option.

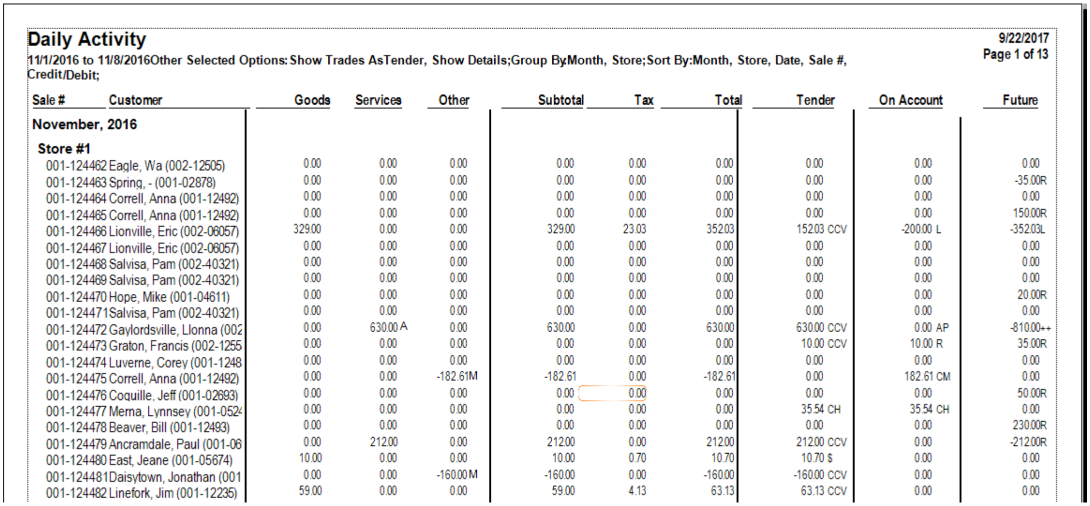
7.3 Activity Reports

All the reports in this section are used to report on transaction activity. Though each report defaults to its most current select criteria, they all share a common filter that operates consistently between the different reports. Each report can be run with/without detail and for any range of dates. Furthermore, the reports can be sorted and grouped by a number of factors, such as associate, customer, date, year, etc. For more about report filters and settings, see the section entitled Creating a Report.

7.3.1 Daily Activity Report

The **Daily Activity** report details each transaction by sale number, customer, goods, services, pricing (including subtotal, tax, and total), tender received, which account the customer used, and notes about future activity. The **Activity** report is useful for end-of-the-day reconciliation. Sales and services will be broken out in separate columns for your review. The report will show you the activity for a single day or multiple days. Each line will show the sale receipt number, the customer's last name, the total spent, and how that money was spent on merchandise or services, on layaway items, special orders, etc. You will see the type of tender used to conduct the transaction.

In this example, we chose to sort the records first by **Month** and then by **Date**.



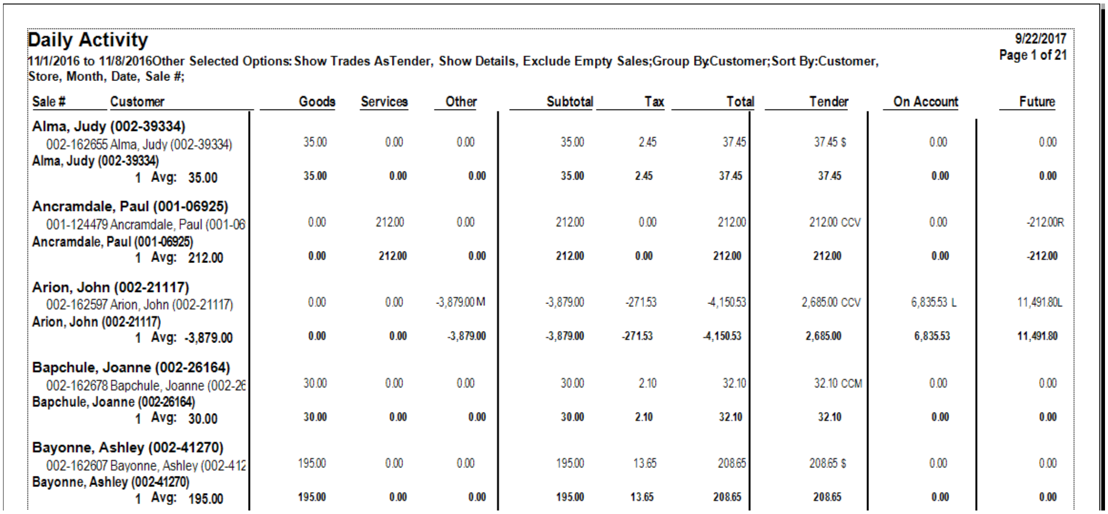
Daily Activity

11/1/2016 to 11/8/2016Other Selected Options: Show Trades AsTender, Show Details;Group By:Month, Store;Sort By:Month, Store, Date, Sale #, Credit/Debit;

9/22/2017
Page 1 of 13

Sale #	Customer	Goods	Services	Other	Subtotal	Tax	Total	Tender	On Account	Future
November, 2016										
Store #1										
001-124462	Eagle, Wa (002-12505)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
001-124463	Spring, - (001-02878)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-35.00R
001-124464	Correll, Anna (001-12492)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
001-124465	Correll, Anna (001-12492)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	150.00R
001-124466	Lionville, Eric (002-06057)	329.00	0.00	0.00	329.00	23.03	352.03	152.03 CCV	-200.00 L	-352.03L
001-124467	Lionville, Eric (002-06057)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
001-124468	Salvisa, Pam (002-40321)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
001-124469	Salvisa, Pam (002-40321)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
001-124470	Hope, Mike (001-04611)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	20.00R
001-124471	Salvisa, Pam (002-40321)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
001-124472	Gaylordsville, Llonna (002	0.00	630.00 A	0.00	630.00	0.00	630.00	630.00 CCV	0.00 AP	-810.00++
001-124473	Graton, Francis (002-1255	0.00	0.00	0.00	0.00	0.00	0.00	10.00 CCV	10.00 R	35.00R
001-124474	Luverne, Corey (001-1248	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
001-124475	Correll, Anna (001-12492)	0.00	0.00	-182.61M	-182.61	0.00	-182.61	0.00	182.61 CM	0.00
001-124476	Coquille, Jeff (001-02693)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	50.00R
001-124477	Merna, Lynnsey (001-0524	0.00	0.00	0.00	0.00	0.00	0.00	35.54 CH	35.54 CH	0.00
001-124478	Beaver, Bill (001-12493)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	230.00R
001-124479	Ancramdale, Paul (001-06	0.00	212.00	0.00	212.00	0.00	212.00	212.00 CCV	0.00	-212.00R
001-124480	East, Jeane (001-05674)	10.00	0.00	0.00	10.00	0.70	10.70	10.70 $	0.00	0.00
001-124481	Daisytown, Jonathan (001	0.00	0.00	-160.00M	-160.00	0.00	-160.00	-160.00 CCV	0.00	0.00
001-124482	Linefork, Jim (001-12235)	59.00	0.00	0.00	59.00	4.13	63.13	63.13 CCV	0.00	0.00

In the next example, we used the same search parameters, but opted to group by **Customer** and moved **Customer** to the top of the **Group By** list. Each customer has his own page in the report. This is an example of the variety of results you can obtain from the various reports and options provided.



Daily Activity

11/1/2016 to 11/8/2016Other Selected Options: Show Trades AsTender, Show Details, Exclude Empty Sales;Group By:Customer;Sort By:Customer, Store, Month, Date, Sale #;

9/22/2017
Page 1 of 21

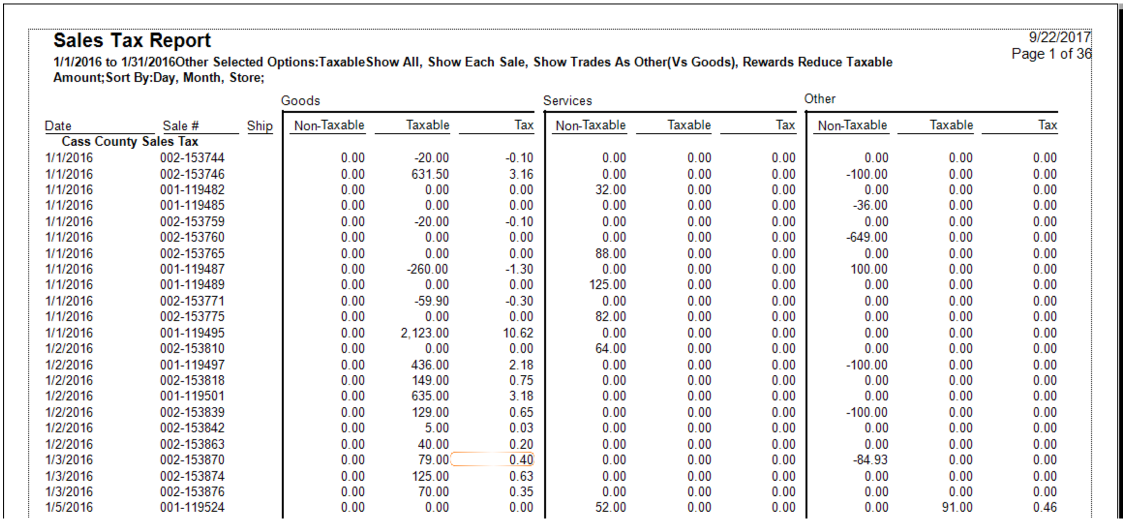
Sale #	Customer	Goods	Services	Other	Subtotal	Tax	Total	Tender	On Account	Future
Alma, Judy (002-39334)										
002-162655	Alma, Judy (002-39334)	35.00	0.00	0.00	35.00	2.45	37.45	37.45 $	0.00	0.00
Alma, Judy (002-39334)										
	1 Avg: 35.00	**35.00**	**0.00**	**0.00**	**35.00**	**2.45**	**37.45**	**37.45**	**0.00**	**0.00**
Ancramdale, Paul (001-06925)										
001-124479	Ancramdale, Paul (001-06	0.00	212.00	0.00	212.00	0.00	212.00	212.00 CCV	0.00	-212.00R
Ancramdale, Paul (001-06925)										
	1 Avg: 212.00	**0.00**	**212.00**	**0.00**	**212.00**	**0.00**	**212.00**	**212.00**	**0.00**	**-212.00**
Arion, John (002-21117)										
002-162597	Arion, John (002-21117)	0.00	0.00	-3,879.00 M	-3,879.00	-271.53	-4,150.53	2,685.00 CCV	6,835.53 L	11,491.80L
Arion, John (002-21117)										
	1 Avg: -3,879.00	**0.00**	**0.00**	**-3,879.00**	**-3,879.00**	**-271.53**	**-4,150.53**	**2,685.00**	**6,835.53**	**11,491.80**
Bapchule, Joanne (002-26164)										
002-162678	Bapchule, Joanne (002-2	30.00	0.00	0.00	30.00	2.10	32.10	32.10 CCM	0.00	0.00
Bapchule, Joanne (002-26164)										
	1 Avg: 30.00	**30.00**	**0.00**	**0.00**	**30.00**	**2.10**	**32.10**	**32.10**	**0.00**	**0.00**
Bayonne, Ashley (002-41270)										
002-162607	Bayonne, Ashley (002-412	195.00	0.00	0.00	195.00	13.65	208.65	208.65 $	0.00	0.00
Bayonne, Ashley (002-41270)										
	1 Avg: 195.00	**195.00**	**0.00**	**0.00**	**195.00**	**13.65**	**208.65**	**208.65**	**0.00**	**0.00**

In either case, data fields in the activity reports results include:

Sale #	Lists the sale number.
Customer	Lists the customer name.
Goods	Lists the total sales from goods.
Services	Lists the total sales from services.
Other	Lists the total sales from other categories.
Subtotal	Subtotal of sales from goods, services, and other.
Tax	The tax collected on the sales.
Total	The total of sales and taxes.
Tender	The total of amounts paid at the time of sale.
On Acct	The total of amounts charged to a store account.
Future	Indicates future value of pending sales, for example, the full sales price of a layaway.

7.3.2 Sales Tax Collected Report

The **Sales Tax Collected** report contains tax details for transactions as defined in the query window. It is primarily run quarterly or annually to report taxable/nontaxable transactions. **System Options** associated with layaways, repairs, and special orders will impact how tax is calculated and displayed on this report. For more about report filters and settings, see the section entitled Creating a Report.



Sales Tax Report

1/1/2016 to 1/31/2016Other Selected Options:TaxableShow All, Show Each Sale, Show Trades As Other(Vs Goods), Rewards Reduce Taxable Amount;Sort By:Day, Month, Store;

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			Goods			Services			Other		
Date	Sale #	Ship	Non-Taxable	Taxable	Tax	Non-Taxable	Taxable	Tax	Non-Taxable	Taxable	Tax
Cass County Sales Tax											
1/1/2016	002-153744		0.00	-20.00	-0.10	0.00	0.00	0.00	0.00	0.00	0.00
1/1/2016	002-153746		0.00	631.50	3.16	0.00	0.00	0.00	-100.00	0.00	0.00
1/1/2016	001-119482		0.00	0.00	0.00	32.00	0.00	0.00	0.00	0.00	0.00
1/1/2016	001-119485		0.00	0.00	0.00	0.00	0.00	0.00	-36.00	0.00	0.00
1/1/2016	002-153759		0.00	-20.00	-0.10	0.00	0.00	0.00	0.00	0.00	0.00
1/1/2016	002-153760		0.00	0.00	0.00	0.00	0.00	0.00	-649.00	0.00	0.00
1/1/2016	002-153765		0.00	0.00	0.00	88.00	0.00	0.00	0.00	0.00	0.00
1/1/2016	001-119487		0.00	-260.00	-1.30	0.00	0.00	0.00	100.00	0.00	0.00
1/1/2016	001-119489		0.00	0.00	0.00	125.00	0.00	0.00	0.00	0.00	0.00
1/1/2016	002-153771		0.00	-59.90	-0.30	0.00	0.00	0.00	0.00	0.00	0.00
1/1/2016	002-153775		0.00	0.00	0.00	82.00	0.00	0.00	0.00	0.00	0.00
1/1/2016	001-119495		0.00	2,123.00	10.62	0.00	0.00	0.00	0.00	0.00	0.00
1/2/2016	002-153810		0.00	0.00	0.00	64.00	0.00	0.00	0.00	0.00	0.00
1/2/2016	001-119497		0.00	436.00	2.18	0.00	0.00	0.00	-100.00	0.00	0.00
1/2/2016	002-153818		0.00	149.00	0.75	0.00	0.00	0.00	0.00	0.00	0.00
1/2/2016	001-119501		0.00	635.00	3.18	0.00	0.00	0.00	0.00	0.00	0.00
1/2/2016	002-153839		0.00	129.00	0.65	0.00	0.00	0.00	-100.00	0.00	0.00
1/2/2016	002-153842		0.00	5.00	0.03	0.00	0.00	0.00	0.00	0.00	0.00
1/2/2016	002-153863		0.00	40.00	0.20	0.00	0.00	0.00	0.00	0.00	0.00
1/3/2016	002-153870		0.00	79.00	0.40	0.00	0.00	0.00	-84.93	0.00	0.00
1/3/2016	002-153874		0.00	125.00	0.63	0.00	0.00	0.00	0.00	0.00	0.00
1/3/2016	002-153876		0.00	70.00	0.35	0.00	0.00	0.00	0.00	0.00	0.00
1/5/2016	001-119524		0.00	0.00	0.00	52.00	0.00	0.00	0.00	91.00	0.46

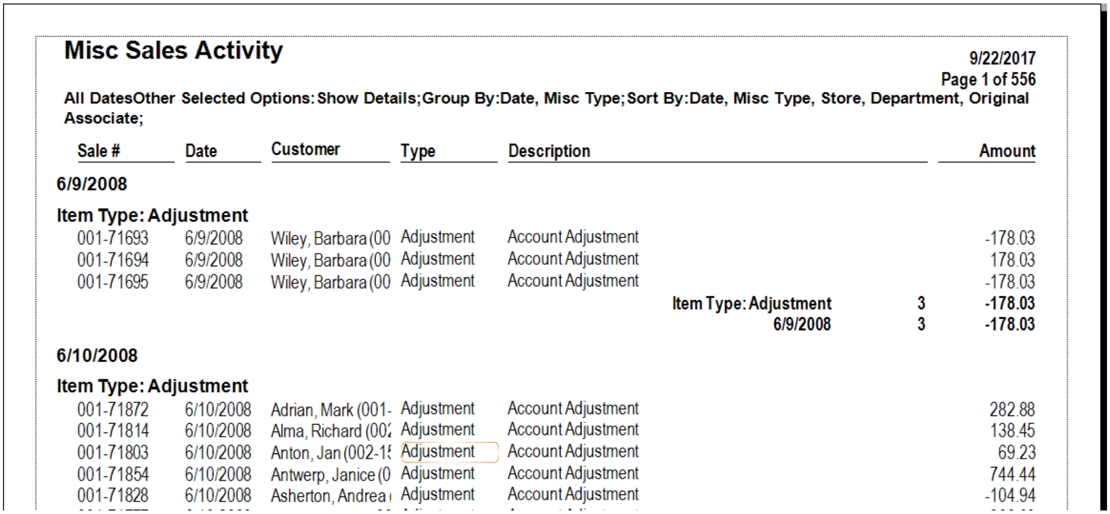
Data fields in the **Sales Tax** report results include:

Date	Date of the transaction.
Sale #	Sale number.
Ship	Whether the item is to be shipped.
Goods: **Non-Taxable, Taxable, Tax**	For items sold in the line, in this case, the transaction, the amounts that were non-taxable and taxable and the amount of tax collected.
Services: **Non-Taxable, Taxable, Tax**	For services provided in the line, in this case, the transaction, the amounts that were non-taxable and taxable and the amount of tax collected.
Other: **Non-Taxable, Taxable, Tax**	For other transactions in the line, in this case, the transaction, the amounts that were non-taxable and taxable and the amount of tax collected.

7.3.3 Misc. Items Report

The **Misc Items** report uses the same query window as the **Daily Activity** report. Note that you can group by type, or any other column header, as desired. Results of the **Misc Items** report details transactions that are considered miscellaneous, i.e., not part of regular sales from goods and services. For more about report filters and settings, see the section entitled Creating a Report.

This report is useful for reporting on all miscellaneous sales transactions and correlates directly with the **Miscellaneous Charge** button in the **Point of Sale** window. Transactions shown here often include non-inventory sales, account adjustments, and donations.



Misc Sales Activity

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All DatesOther Selected Options: Show Details; Group By:Date, Misc Type; Sort By:Date, Misc Type, Store, Department, Original Associate;

Sale #	Date	Customer	Type	Description			Amount
6/9/2008							
Item Type: Adjustment							
001-71693	6/9/2008	Wiley, Barbara (00	Adjustment	Account Adjustment			-178.03
001-71694	6/9/2008	Wiley, Barbara (00	Adjustment	Account Adjustment			178.03
001-71695	6/9/2008	Wiley, Barbara (00	Adjustment	Account Adjustment			-178.03
					Item Type: Adjustment	**3**	**-178.03**
					6/9/2008	**3**	**-178.03**
6/10/2008							
Item Type: Adjustment							
001-71872	6/10/2008	Adrian, Mark (001-	Adjustment	Account Adjustment			282.88
001-71814	6/10/2008	Alma, Richard (00	Adjustment	Account Adjustment			138.45
001-71803	6/10/2008	Anton, Jan (002-1	Adjustment	Account Adjustment			69.23
001-71854	6/10/2008	Antwerp, Janice (0	Adjustment	Account Adjustment			744.44
001-71828	6/10/2008	Asherton, Andrea	Adjustment	Account Adjustment			-104.94

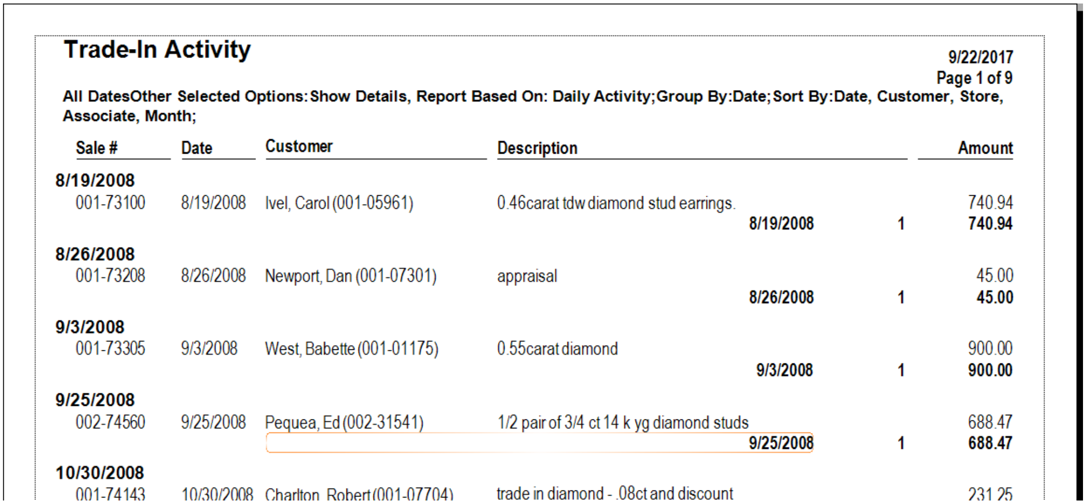
Data fields in the **Misc Items** report include:

Sale #	Sales transaction number.
Date	Date of transaction.
Customer	Customer name.
Type	Type of miscellaneous sales line.
Description	Description of the miscellaneous item.
Amount	Amount of the sale.

7.3.4 Trades Report

The **Trades** report generates a report of trade-in transactions that occurred. It uses the same query window as the **Daily Activity** report. For more about report filters and settings, see the section entitled Creating a Report.

Though trades are shown on the **Daily Activity** report as well, this report is included as a quick way to isolate only trade-ins. The report correlates directly with the **Trade/Buy** button at point of sale.



Trade-In Activity

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All DatesOther Selected Options: Show Details, Report Based On: Daily Activity; Group By: Date; Sort By: Date, Customer, Store, Associate, Month;

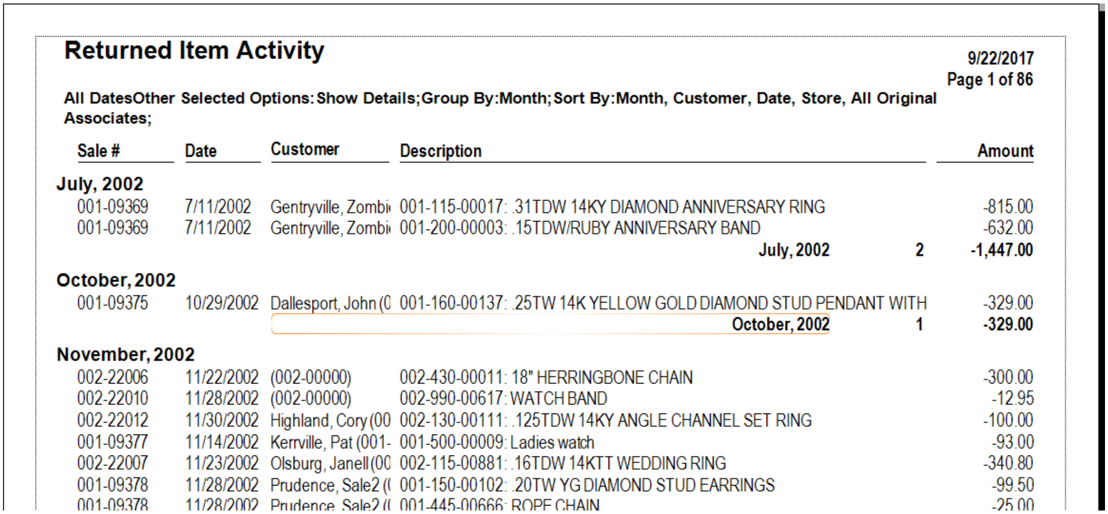
Sale #	Date	Customer	Description			Amount
8/19/2008						
001-73100	8/19/2008	Ivel, Carol (001-05961)	0.46carat tdw diamond stud earrings.			740.94
				8/19/2008	**1**	**740.94**
8/26/2008						
001-73208	8/26/2008	Newport, Dan (001-07301)	appraisal			45.00
				8/26/2008	**1**	**45.00**
9/3/2008						
001-73305	9/3/2008	West, Babette (001-01175)	0.55carat diamond			900.00
				9/3/2008	**1**	**900.00**
9/25/2008						
002-74560	9/25/2008	Pequea, Ed (002-31541)	1/2 pair of 3/4 ct 14 k yg diamond studs			688.47
				9/25/2008	**1**	**688.47**
10/30/2008						
001-74143	10/30/2008	Charlton, Robert (001-07704)	trade in diamond - .08ct and discount			231.25

Data fields in the **Trades** report include:

Sale #	Sales transaction number.
Date	Date of transaction.
Customer	Customer name.
Description	Description of the traded item.
Amount	Amount of the trade-in.

7.3.5 Returns Report

The **Returns** report details return transactions of any kind. It uses the same query window as the **Daily Activity** report. For more about report filters and settings, see the section entitled Creating a Report.



Returned Item Activity

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All DatesOther Selected Options: Show Details; Group By: Month; Sort By: Month, Customer, Date, Store, All Original Associates;

Sale #	Date	Customer	Description		Amount
July, 2002					
001-09369	7/11/2002	Gentryville, Zombi	001-115-00017: .31TDW 14KY DIAMOND ANNIVERSARY RING		-815.00
001-09369	7/11/2002	Gentryville, Zombi	001-200-00003: .15TDW/RUBY ANNIVERSARY BAND		-632.00
			July, 2002	**2**	**-1,447.00**
October, 2002					
001-09375	10/29/2002	Dallesport, John (0	001-160-00137: .25TW 14K YELLOW GOLD DIAMOND STUD PENDANT WITH		-329.00
			October, 2002	**1**	**-329.00**
November, 2002					
002-22006	11/22/2002	(002-00000)	002-430-00011: 18" HERRINGBONE CHAIN		-300.00
002-22010	11/28/2002	(002-00000)	002-990-00617: WATCH BAND		-12.95
002-22012	11/30/2002	Highland, Cory (00	002-130-00111: .125TDW 14KY ANGLE CHANNEL SET RING		-100.00
001-09377	11/14/2002	Kerrville, Pat (001-	001-500-00009: Ladies watch		-93.00
002-22007	11/23/2002	Olsburg, Janell (00	002-115-00881: .16TDW 14KTT WEDDING RING		-340.80
001-09378	11/28/2002	Prudence, Sale2 ((	001-150-00102: .20TW YG DIAMOND STUD EARRINGS		-99.50
001-09378	11/28/2002	Prudence, Sale2 ((	001-445-00666: ROPE CHAIN		-25.00

Data fields in the **Return Activity** report include:

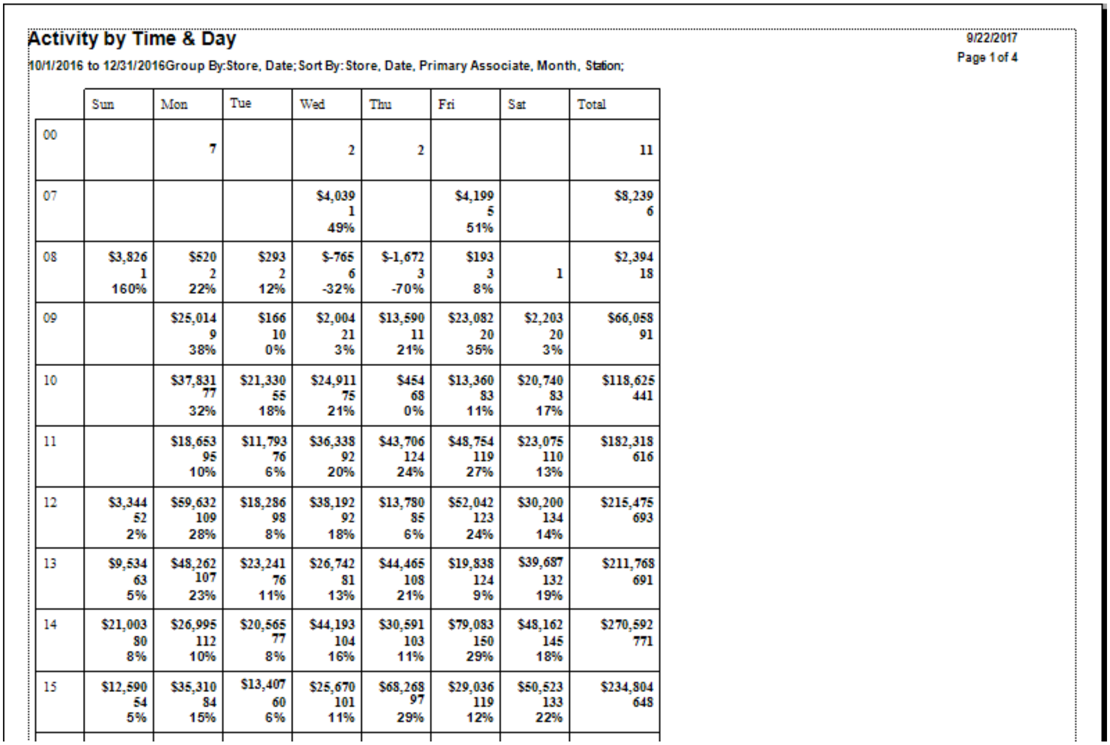
Sale #	Sales transaction number.
Date	Date of transaction.
Customer	Customer name.
Description	Description of the returned item.
Amount	Amount of the return.

7.3.6 Time & Day Report

The **Time & Day** report details retail sales broken down by day of the week and hour of the day. It is helpful in determining store traffic patterns. This report also includes entries for sales by number of receipts. It uses the same query window as the **Daily Activity** report. For more about report filters and settings, see the section entitled Creating a Report.

This report is only useful if point-of-sale transactions are made in real-time.

The first page of the **Time & Day** report displays a chart with the days of the week across the top and the hours of the day along the left side. This tabulates sales by hour and day with totals for each category.



Activity by Time & Day

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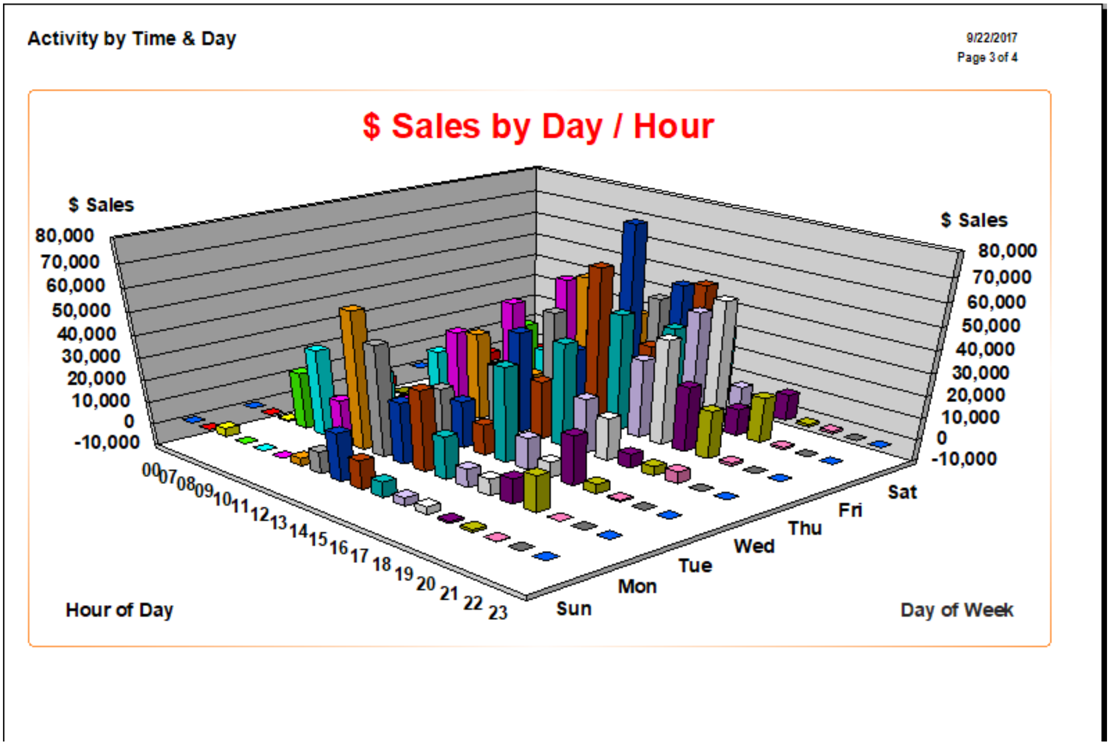
10/1/2016 to 12/31/2016Group By:Store, Date; Sort By: Store, Date, Primary Associate, Month, Station;

	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
00		7		2	2			11
07				$4,039 1 49%		$4,199 5 51%		$8,239 6
08	$3,826 1 160%	$520 2 22%	$293 2 12%	$-765 6 -32%	$-1,672 3 -70%	$193 3 8%	1	$2,394 18
09		$25,014 9 38%	$166 10 0%	$2,004 21 3%	$13,590 11 21%	$23,082 20 35%	$2,203 20 3%	$66,058 91
10		$37,831 77 32%	$21,330 55 18%	$24,911 75 21%	$454 68 0%	$13,360 83 11%	$20,740 83 17%	$118,625 441
11		$18,653 95 10%	$11,793 76 6%	$36,338 92 20%	$43,706 124 24%	$48,754 119 27%	$23,075 110 13%	$182,318 616
12	$3,344 52 2%	$59,632 109 28%	$18,286 98 8%	$38,192 92 18%	$13,780 85 6%	$52,042 123 24%	$30,200 134 14%	$215,475 693
13	$9,534 63 5%	$48,262 107 23%	$23,241 76 11%	$26,742 81 13%	$44,465 108 21%	$19,838 124 9%	$39,687 132 19%	$211,768 691
14	$21,003 80 8%	$26,995 112 10%	$20,565 77 8%	$44,193 104 16%	$30,591 103 11%	$79,083 150 29%	$48,162 145 18%	$270,592 771
15	$12,590 54 5%	$35,310 84 15%	$13,407 60 6%	$25,670 101 11%	$68,268 97 29%	$29,036 119 12%	$50,523 133 22%	$234,804 648

The second page of the **Time & Day** report shows the same data in a bar graph. This allows you to see at a glance what the peak times and days are.



Activity by Time & Day

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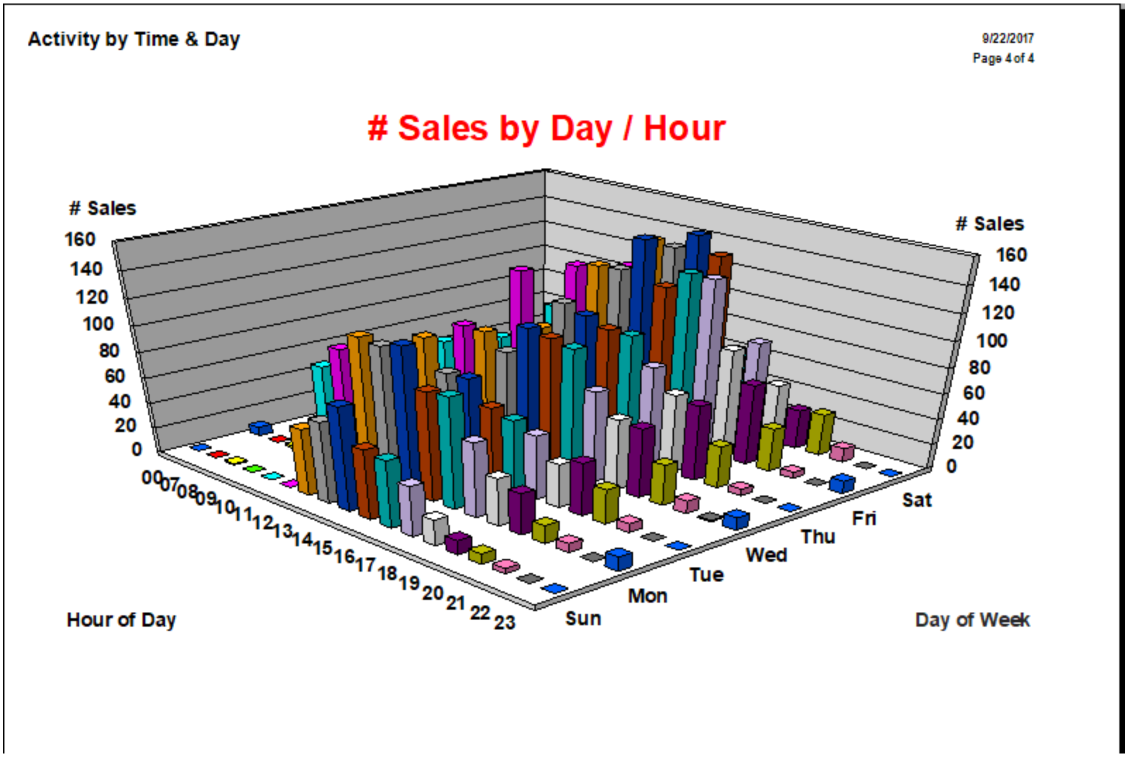
A third page contains a similar graph containing the sales represented by number of receipts generated.



Activity by Time & Day

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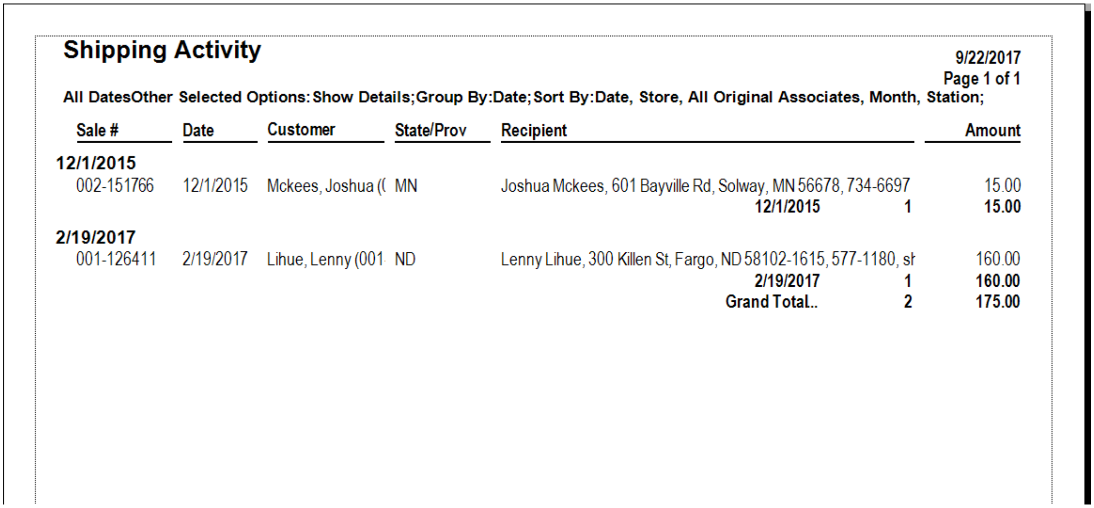
7.3.7 Shipping Report

The **Shipping** report details shipping activity by sale number, date, customer's name, associate, store, and/or shipping. It correlates directly with the **Ship To** button on the **Point of Sale** window. For more about report filters and settings, see the section entitled Creating a Report.



Shipping Activity

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All DatesOther Selected Options:Show Details;Group By:Date;Sort By:Date, Store, All Original Associates, Month, Station;

Sale #	Date	Customer	State/Prov	Recipient		Amount
12/1/2015						
002-151766	12/1/2015	Mckees, Joshua ((	MN	Joshua Mckees, 601 Bayville Rd, Solway, MN 56678, 734-6697		15.00
				12/1/2015	**1**	**15.00**
2/19/2017						
001-126411	2/19/2017	Lihue, Lenny (001	ND	Lenny Lihue, 300 Killen St, Fargo, ND 58102-1615, 577-1180, sh		160.00
				2/19/2017	**1**	**160.00**
				Grand Total..	**2**	**175.00**

Data fields in the **Shipping** report include:

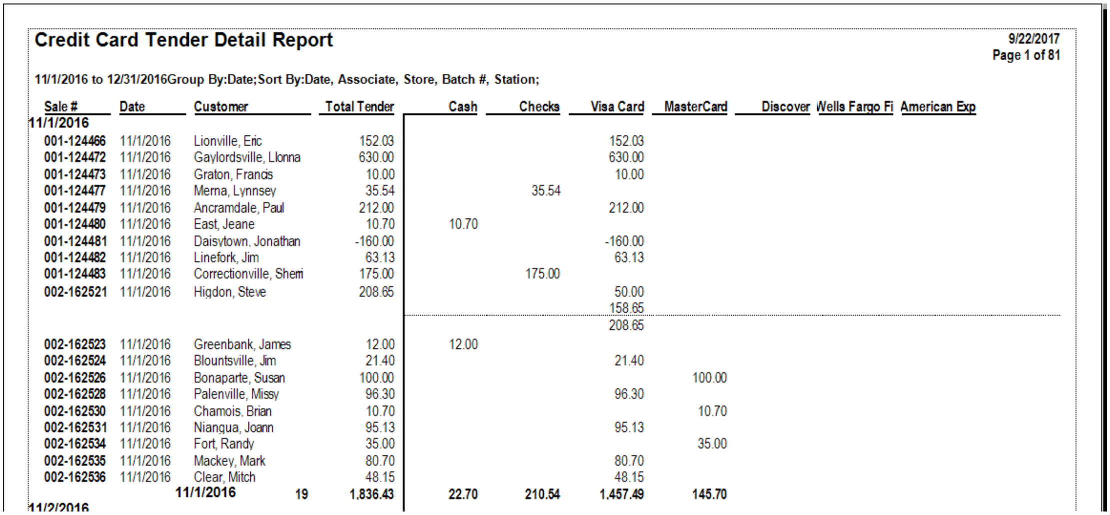
Sale #	Sales transaction number.
Date	Date of transaction.
Customer	Customer name.
State/Province	General location of the recipient.
Recipient	Name and address of the recipient. This field may be truncated.
Amount	Amount of the return.

7.3.8 Tender Detail Report

The **Tender Detail** reports generate information concerning the types of payments made. There are two reports, one to detail tender transactions by specific credit cards and one to detail tender by all other options (cash, check, etc.). It uses a query window very similar to the **Daily Activity** report. For more about report filters and settings, see the section entitled Creating a Report.

7.3.8.1 Credit Card Tender Detail

The **Credit Card Tender Detail** report displays transactions with an emphasis on credit card details.



Credit Card Tender Detail Report

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11/1/2016 to 12/31/2016Group By:Date;Sort By:Date, Associate, Store, Batch #, Station;

Sale #	Date	Customer	Total Tender	Cash	Checks	Visa Card	MasterCard	Discover	Wells Fargo Fi	American Exp
11/1/2016										
001-124466	11/1/2016	Lionville, Eric	152.03			152.03				
001-124472	11/1/2016	Gaylordsville, Llonna	630.00			630.00				
001-124473	11/1/2016	Graton, Francis	10.00			10.00				
001-124477	11/1/2016	Merna, Lynnsey	35.54		35.54					
001-124479	11/1/2016	Ancramdale, Paul	212.00			212.00				
001-124480	11/1/2016	East, Jeane	10.70	10.70						
001-124481	11/1/2016	Daisytown, Jonathan	-160.00			-160.00				
001-124482	11/1/2016	Linefork, Jim	63.13			63.13				
001-124483	11/1/2016	Correctionville, Sherri	175.00		175.00					
002-162521	11/1/2016	Higdon, Steve	208.65			50.00 158.65 208.65				
002-162523	11/1/2016	Greenbank, James	12.00	12.00						
002-162524	11/1/2016	Blountsville, Jim	21.40			21.40				
002-162526	11/1/2016	Bonaparte, Susan	100.00				100.00			
002-162528	11/1/2016	Palenville, Missy	96.30			96.30				
002-162530	11/1/2016	Chamois, Brian	10.70				10.70			
002-162531	11/1/2016	Niangua, Joann	95.13			95.13				
002-162534	11/1/2016	Fort, Randy	35.00				35.00			
002-162535	11/1/2016	Mackey, Mark	80.70			80.70				
002-162536	11/1/2016	Clear, Mitch	48.15			48.15				
	11/1/2016	**19**	**1,836.43**	**22.70**	**210.54**	**1,457.49**	**145.70**			
11/2/2016										

Data fields in the **Credit Card Tender Detail** report include:

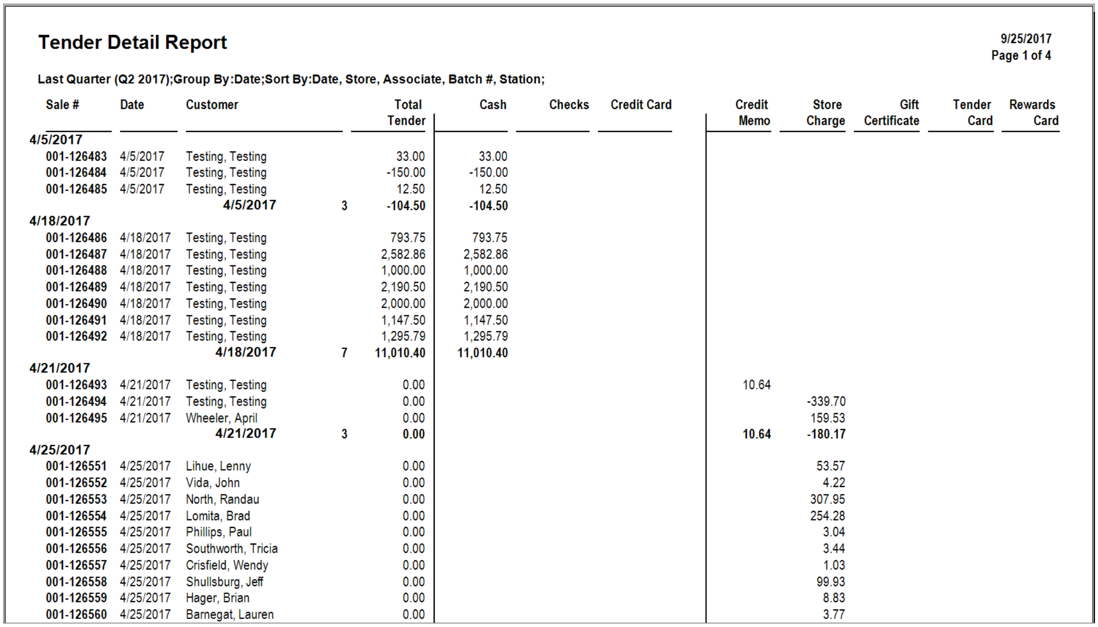
Sale #	The ID for the transaction in which the sale took place.
Date	The date of the sale.
Customer	The customer's ID and name.
Total Tender	The total sale.
Cash	The amount of the sale in cash.
Checks	The amount of the sale in checks.
VISA Card	The amount of the sale charged to a VISA®.
MasterCard	The amount of the sale charged to MasterCard®.
Discover	The amount of the sale charged to Discover®.
Wells Fargo	The amount of the sale charged to Wells Fargo®.

American Express	The amount of the sale charged to American Express®.

- **The credit cards shown in the Credit Card Tender report are examples. The credit cards that are actually listed will be those for which your system is configured to accept.**
- **If a sale used more than one credit card payment, there will be an entry for each payment with a subtotal for the transaction.**

7.3.8.2 Tender Detail Report

The **Tender Detail** report details all tender transactions, not just credit cards.



Tender Detail Report

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Last Quarter (Q2 2017);Group By:Date;Sort By:Date, Store, Associate, Batch #, Station;

Sale #	Date	Customer		Total Tender	Cash	Checks	Credit Card	Credit Memo	Store Charge	Gift Certificate	Tender Card	Rewards Card
4/5/2017												
001-126483	4/5/2017	Testing, Testing		33.00	33.00							
001-126484	4/5/2017	Testing, Testing		-150.00	-150.00							
001-126485	4/5/2017	Testing, Testing		12.50	12.50							
		4/5/2017	**3**	**-104.50**	**-104.50**							
4/18/2017												
001-126486	4/18/2017	Testing, Testing		793.75	793.75							
001-126487	4/18/2017	Testing, Testing		2,582.86	2,582.86							
001-126488	4/18/2017	Testing, Testing		1,000.00	1,000.00							
001-126489	4/18/2017	Testing, Testing		2,190.50	2,190.50							
001-126490	4/18/2017	Testing, Testing		2,000.00	2,000.00							
001-126491	4/18/2017	Testing, Testing		1,147.50	1,147.50							
001-126492	4/18/2017	Testing, Testing		1,295.79	1,295.79							
		4/18/2017	**7**	**11,010.40**	**11,010.40**							
4/21/2017												
001-126493	4/21/2017	Testing, Testing		0.00				10.64				
001-126494	4/21/2017	Testing, Testing		0.00					-339.70			
001-126495	4/21/2017	Wheeler, April		0.00					159.53			
		4/21/2017	**3**	**0.00**				**10.64**	**-180.17**			
4/25/2017												
001-126551	4/25/2017	Lihue, Lenny		0.00					53.57			
001-126552	4/25/2017	Vida, John		0.00					4.22			
001-126553	4/25/2017	North, Randau		0.00					307.95			
001-126554	4/25/2017	Lomita, Brad		0.00					254.28			
001-126555	4/25/2017	Phillips, Paul		0.00					3.04			
001-126556	4/25/2017	Southworth, Tricia		0.00					3.44			
001-126557	4/25/2017	Crisfield, Wendy		0.00					1.03			
001-126558	4/25/2017	Shullsburg, Jeff		0.00					99.93			
001-126559	4/25/2017	Hager, Brian		0.00					8.83			
001-126560	4/25/2017	Barnegat, Lauren		0.00					3.77			

Data fields in the **Tender Detail** report include:

Sale #	Sales transaction number.
Date	Date of transaction.
Customer	Customer name.
Total Tender	The total tendered for the transaction.
Cash	The portion of the tender taken or returned in cash.
Check	The portion of the tender taken or returned by check.
Credit Card	The portion of the tender taken or returned by credit card.
Credit Memo	The portion of the tender taken or returned by credit memo.
Store Charge	The portion of the tender taken or returned by store charge.
Gift Certificate	The portion of the tender taken or returned by gift certificate.
Tender Card	The portion of the tender taken or returned by tender card.
Rewards Card	The portion of the tender taken or returned by rewards card.

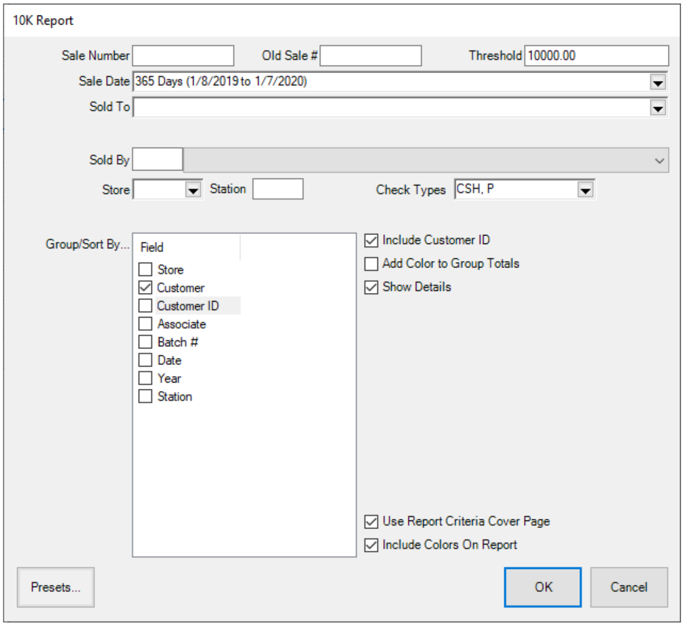
7.3.8.3 10k Report

The IRS requires any business that receives more than $10,000 in cash or check payment from one customer, either in a single payment or series of connected transactions, must file Form 8300. This is part of their anti-money laundering (AML) program.

The **10k Report** has been added to help you comply with this. The report allows you to specify a dollar threshold and choose a date range. Any customers whose total tender exceeded the threshold will be displayed along with their payment details.

To run the **10k Report**:

1. Click **Reports > Activity > Tender Detail > 10K**.



10K Report

Sale Number

Old Sale #

Threshold 10000.00

Sale Date 365 Days (1/8/2019 to 1/7/2020)

Sold To

Sold By

Store

Station

Check Types CSH, P

Group/Sort By...

Field

☐ Store

☑ Customer

☐ Customer ID

☐ Associate

☐ Batch #

☐ Date

☐ Year

☐ Station

☑ Include Customer ID

☐ Add Color to Group Totals

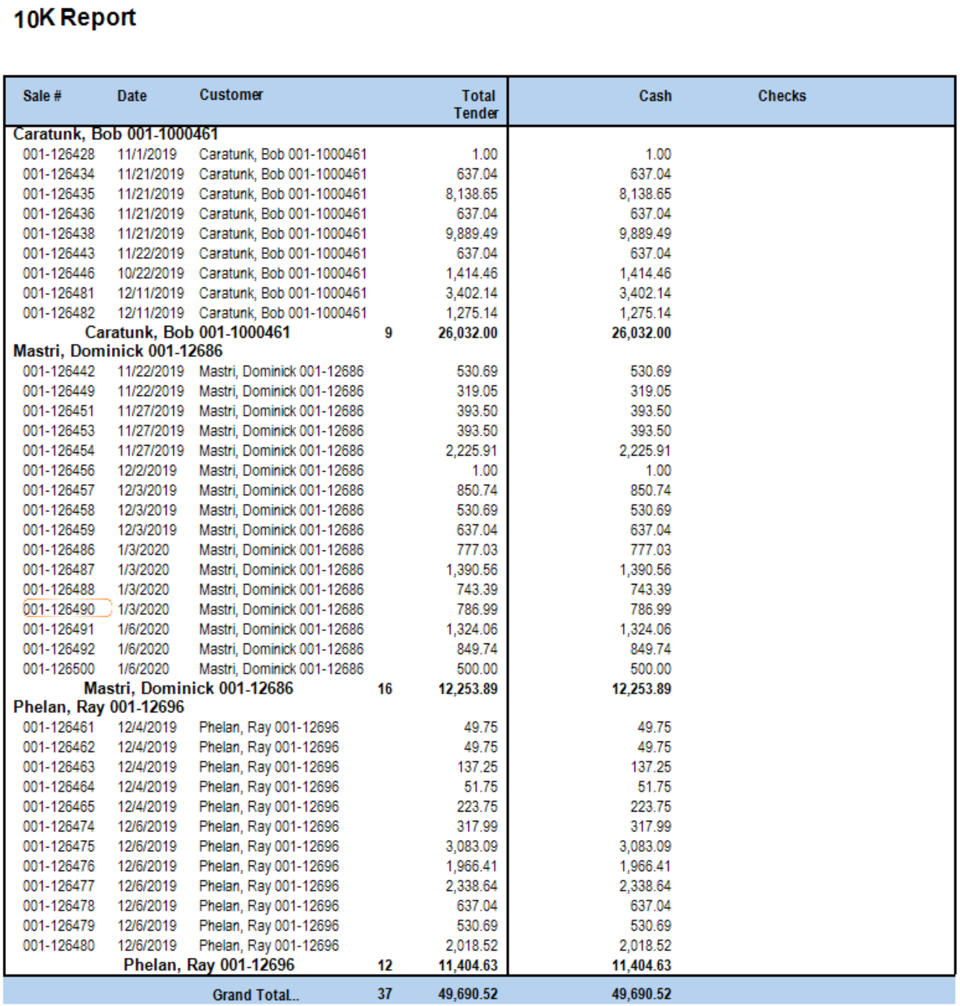
☑ Show Details

☑ Use Report Criteria Cover Page

☑ Include Colors On Report

2. In the top right, specify a dollar **Threshold.** Only customers who exceed this value for the date range given will appear.
3. Specify the **Sale Date** range to analyze.
4. Use the **Check Types** drop-down to choose check types to include.
5. For **Group/Sort By,** check **Customer**.
6. Check **Include Customer ID**.
7. Check **Show Details**.

8. Click **OK** to generate the report.



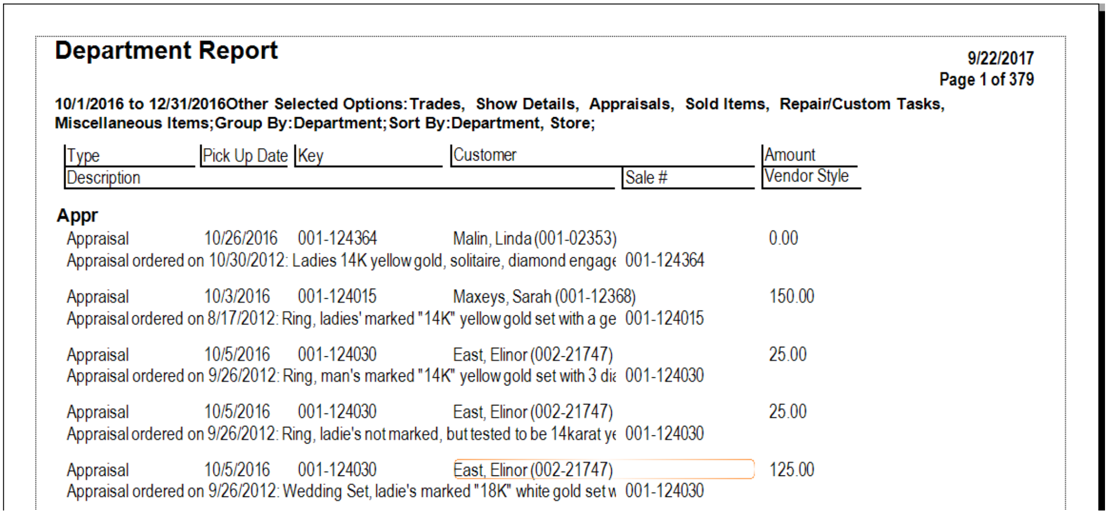
10K Report

Sale #	Date	Customer		Total Tender	Cash	Checks
Caratunk, Bob 001-1000461						
001-126428	11/1/2019	Caratunk, Bob 001-1000461		1.00	1.00	
001-126434	11/21/2019	Caratunk, Bob 001-1000461		637.04	637.04	
001-126435	11/21/2019	Caratunk, Bob 001-1000461		8,138.65	8,138.65	
001-126436	11/21/2019	Caratunk, Bob 001-1000461		637.04	637.04	
001-126438	11/21/2019	Caratunk, Bob 001-1000461		9,889.49	9,889.49	
001-126443	11/22/2019	Caratunk, Bob 001-1000461		637.04	637.04	
001-126446	10/22/2019	Caratunk, Bob 001-1000461		1,414.46	1,414.46	
001-126481	12/11/2019	Caratunk, Bob 001-1000461		3,402.14	3,402.14	
001-126482	12/11/2019	Caratunk, Bob 001-1000461		1,275.14	1,275.14	
		Caratunk, Bob 001-1000461	**9**	**26,032.00**	**26,032.00**	
Mastri, Dominick 001-12686						
001-126442	11/22/2019	Mastri, Dominick 001-12686		530.69	530.69	
001-126449	11/22/2019	Mastri, Dominick 001-12686		319.05	319.05	
001-126451	11/27/2019	Mastri, Dominick 001-12686		393.50	393.50	
001-126453	11/27/2019	Mastri, Dominick 001-12686		393.50	393.50	
001-126454	11/27/2019	Mastri, Dominick 001-12686		2,225.91	2,225.91	
001-126456	12/2/2019	Mastri, Dominick 001-12686		1.00	1.00	
001-126457	12/3/2019	Mastri, Dominick 001-12686		850.74	850.74	
001-126458	12/3/2019	Mastri, Dominick 001-12686		530.69	530.69	
001-126459	12/3/2019	Mastri, Dominick 001-12686		637.04	637.04	
001-126486	1/3/2020	Mastri, Dominick 001-12686		777.03	777.03	
001-126487	1/3/2020	Mastri, Dominick 001-12686		1,390.56	1,390.56	
001-126488	1/3/2020	Mastri, Dominick 001-12686		743.39	743.39	
001-126490	1/3/2020	Mastri, Dominick 001-12686		786.99	786.99	
001-126491	1/6/2020	Mastri, Dominick 001-12686		1,324.06	1,324.06	
001-126492	1/6/2020	Mastri, Dominick 001-12686		849.74	849.74	
001-126500	1/6/2020	Mastri, Dominick 001-12686		500.00	500.00	
		Mastri, Dominick 001-12686	**16**	**12,253.89**	**12,253.89**	
Phelan, Ray 001-12696						
001-126461	12/4/2019	Phelan, Ray 001-12696		49.75	49.75	
001-126462	12/4/2019	Phelan, Ray 001-12696		49.75	49.75	
001-126463	12/4/2019	Phelan, Ray 001-12696		137.25	137.25	
001-126464	12/4/2019	Phelan, Ray 001-12696		51.75	51.75	
001-126465	12/4/2019	Phelan, Ray 001-12696		223.75	223.75	
001-126474	12/6/2019	Phelan, Ray 001-12696		317.99	317.99	
001-126475	12/6/2019	Phelan, Ray 001-12696		3,083.09	3,083.09	
001-126476	12/6/2019	Phelan, Ray 001-12696		1,966.41	1,966.41	
001-126477	12/6/2019	Phelan, Ray 001-12696		2,338.64	2,338.64	
001-126478	12/6/2019	Phelan, Ray 001-12696		637.04	637.04	
001-126479	12/6/2019	Phelan, Ray 001-12696		530.69	530.69	
001-126480	12/6/2019	Phelan, Ray 001-12696		2,018.52	2,018.52	
		Phelan, Ray 001-12696	**12**	**11,404.63**	**11,404.63**	
		Grand Total...	**37**	**49,690.52**	**49,690.52**	

The report will display any customer who exceeded the dollar threshold specified for the sale date range chosen. It then displays each transaction along with the payment type and amount collected.

7.3.9 By Department Report

The **By Department** report contains a listing of activity by type: appraisals, trades, sold items, repairs, and miscellaneous. In the report filter, if you are working with trade-ins, there is an option to indicate whether the trades should be shown as negative or positive. For more about report filters and settings, see the section entitled Creating a Report.



Department Report

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10/1/2016 to 12/31/2016Other Selected Options:Trades, Show Details, Appraisals, Sold Items, Repair/Custom Tasks, Miscellaneous Items;Group By:Department;Sort By:Department, Store;

Type	Pick Up Date	Key	Customer	Amount
Description			Sale #	Vendor Style
Appr				
Appraisal	10/26/2016	001-124364	Malin, Linda (001-02353)	0.00
Appraisal ordered on 10/30/2012: Ladies 14K yellow gold, solitaire, diamond engag			001-124364	
Appraisal	10/3/2016	001-124015	Maxeys, Sarah (001-12368)	150.00
Appraisal ordered on 8/17/2012: Ring, ladies' marked "14K" yellow gold set with a ge			001-124015	
Appraisal	10/5/2016	001-124030	East, Elinor (002-21747)	25.00
Appraisal ordered on 9/26/2012: Ring, man's marked "14K" yellow gold set with 3 di			001-124030	
Appraisal	10/5/2016	001-124030	East, Elinor (002-21747)	25.00
Appraisal ordered on 9/26/2012: Ring, ladie's not marked, but tested to be 14karat y			001-124030	
Appraisal	10/5/2016	001-124030	East, Elinor (002-21747)	125.00
Appraisal ordered on 9/26/2012: Wedding Set, ladie's marked "18K" white gold set w			001-124030	

Data fields in the **By Department** report include:

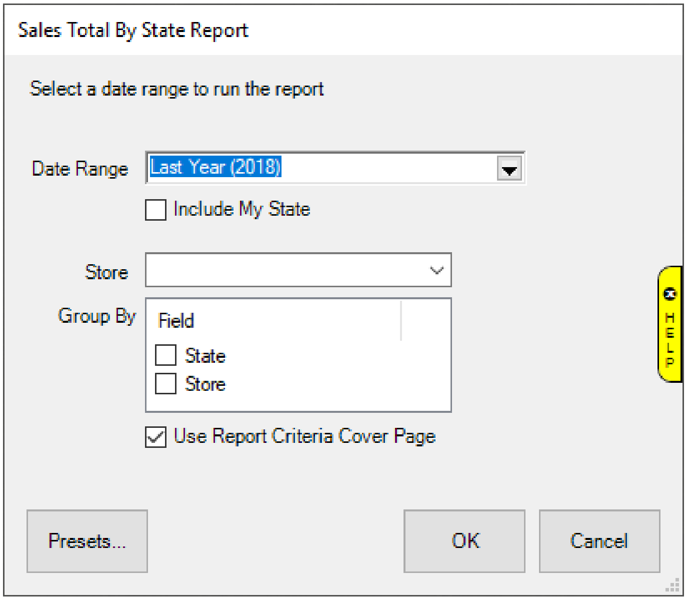
Type	The type of activity: sale, repair, etc.
Pickup Date	Date of transaction for sales, for pickup for repairs and services.
Key	The item ID.
Customer	Customer name.
Amount	The amount of the transaction.
Description	A description of the item or activity.
Sale #	The ID number of the sales transaction.
Vendor Style	The vendor's style number, if applicable.

7.3.10 Sales by State

The **Sales by State** report breaks down sales by the state shipped to. This can be useful for determining states where you have a tax collection obligation.

To run the report:

1. Click **Reports > Activity > Sales by State**. The **Sales Total by State Report** window will



Sales Total By State Report

Select a date range to run the report

Date Range: Last Year (2018)

☐ Include My State

Store:

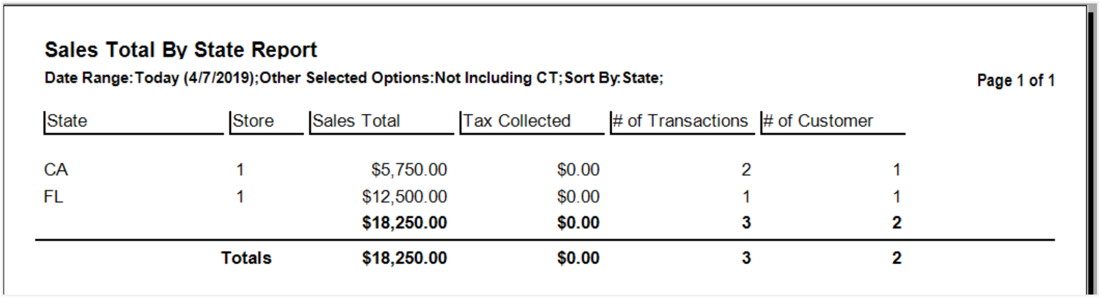
Group By: Field

☐ State

☐ Store

☑ Use Report Criteria Cover Page

2. Specify the **Date Range** you wish to analyze.
3. By default, this report will only include sales shipped out of state. To include sales shipped in your state, check **Include My State**.
4. If you are a multi-store user, you can use the **Store** drop-down to run this for a specific store. Leave blank to include all stores.
5. Click **OK** to generate the report.



Sales Total By State Report

Date Range:Today (4/7/2019);Other Selected Options:Not Including CT;Sort By:State;

Page 1 of 1

State	Store	Sales Total	Tax Collected	# of Transactions	# of Customer
CA	1	$5,750.00	$0.00	2	1
FL	1	$12,500.00	$0.00	1	1
		$18,250.00	**$0.00**	**3**	**2**
	Totals	**$18,250.00**	**$0.00**	**3**	**2**

Fields on this report include:

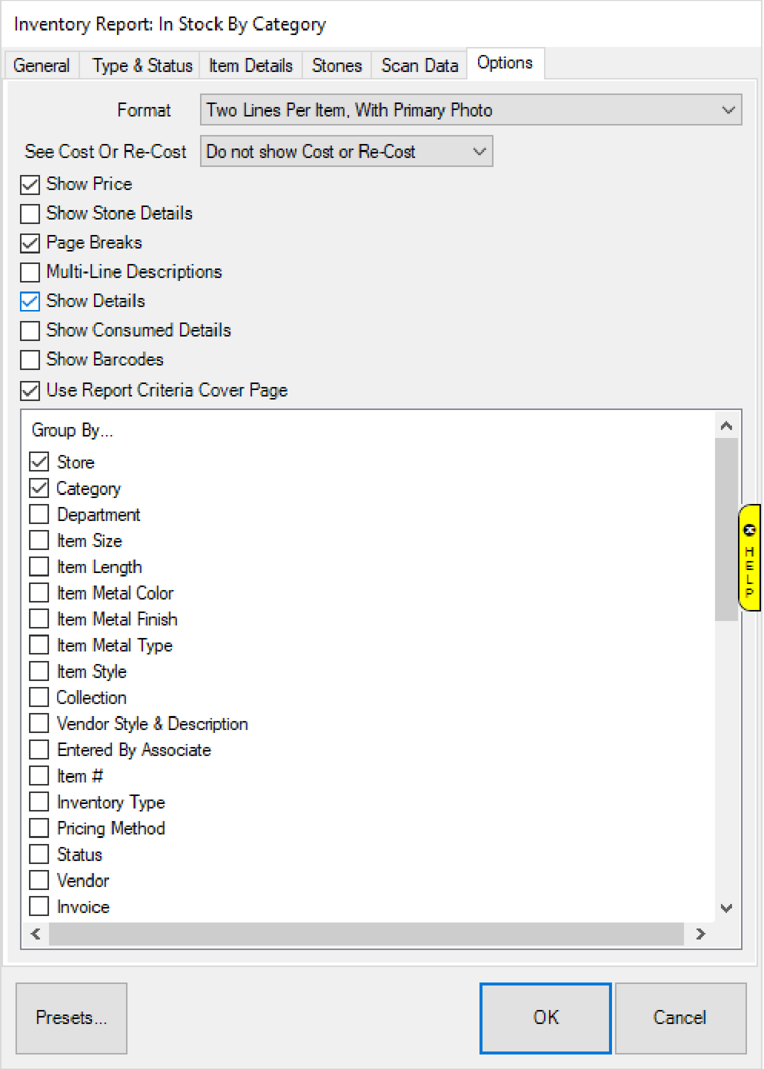
State	The state the sales were shipped to.
Store	For multi-store users, a breakdown by store #.
Sales Total	The total sales amount.
Tax Collected	The total tax collected.

# of Transactions	The # of transactions. Click on this # to see a list of the sales receipts.
# of Customers	The # of customers. Click on this # to see a list of the customers.

7.4 Inventory Reports

Through the use of inventory filters, The Edge allows you to produce general inventory reports for all items or very specific reports (e.g., a list of items in category 200 over 365 days old that cost between $300 and $500). Each value entered into the filter will further refine the report. For example, in a **Sold Item** report, selecting **OK** without entering anything would direct The Edge to produce a sold report of every item ever sold. Entering a value of `200` in the **Category** field would limit the same report to only items sold from category 200. Adding a vendor ID to the criteria would then produce a sold report of items from category 200 that were supplied by that vendor. Most of the tabs in the Inventory report filters mirror those in the Item Find filter. For a video tutorial about working with inventory filters, go to http://www.screencast.com/t/ICQVlzwB.

When you select one of the Inventory reports, The Edge will present you with a query window similar to that of **Find Item** (see the section entitled Finding and Editing an Item). The **Options** tab, however, will differ in that it will offer more options for the report output, including flexibility for how the report is grouped and sorted and the amount of detail.



Inventory Report: In Stock By Category

Format: Two Lines Per Item, With Primary Photo

See Cost Or Re-Cost: Do not show Cost or Re-Cost

☑ Show Price
☐ Show Stone Details
☑ Page Breaks
☐ Multi-Line Descriptions
☑ Show Details
☐ Show Consumed Details
☐ Show Barcodes
☑ Use Report Criteria Cover Page

Group By...

☑ Store
☑ Category
☐ Department
☐ Item Size
☐ Item Length
☐ Item Metal Color
☐ Item Metal Finish
☐ Item Metal Type
☐ Item Style
☐ Collection
☐ Vendor Style & Description
☐ Entered By Associate
☐ Item #
☐ Inventory Type
☐ Pricing Method
☐ Status
☐ Vendor
☐ Invoice

Fields and options in the **Options** tab include:

Format	How you want the report results to be laid out: • `One line per item` • `Two lines per item` • `Two lines per item with primary photo` • `Two lines per item with multiple photos` • `3x5 cards, landscape, with primary photo` • `3x5 cards, portrait, with primary photo.`

See Cost or Re-Cost	Whether to show the cost or replacement cost: • `Do not show Cost or Re-Cost` • `Show Cost` • `Show Re-Cost.`
Show Price	Whether to show the item price.
Show Stone Details	Whether to show stone details (primary stone only) for each item on the report.
Page Breaks	Inserts a new page for each primary grouping. For example, this is useful for separating inventory reports by vendor for use at show.
Multi-Line Descriptions	Whether to show whole descriptions if they take up more than one line.
Show Details	Whether to show retails for each item in the grouping as opposed to only showing totals.
Show Consumed Details	For items consumed in a job, whether to show the job number as part of the item description.
Show Barcodes	Whether to include the item's barcode.
Use Report Criteria Cover Page	Whether to include report criteria cover page.

Group By	Whether to group by any or all of the following: • `Store` • `Category` • `Department` • `Item Size` • `Item Length` • `Item Metal Color` • `Item Metal Finish` • `Item Metal Type` • `Item Style` • `Item #` • `Inventory Type` • `Pricing Method` • `Status` • `Vendor` • `Invoice` • `Vendor Style` • `Location` • `Customer` • `Month Sold` • `Date Sold` • `Month Entered` • `Date Entered` • `Owner` • `Adv Media` • `Event` • `Why In` • `Primary Associate` • `All Associates` • `Primary Original Associate` • `Original Associates` • `Memo Expiration Date` • `Physical Inventory Associate` • `Physical Inventory Date` • `Payable Date` • `Collection` • `Enter by Associate` • `Sale #` • `Stone Clarity` • `Stone Color`

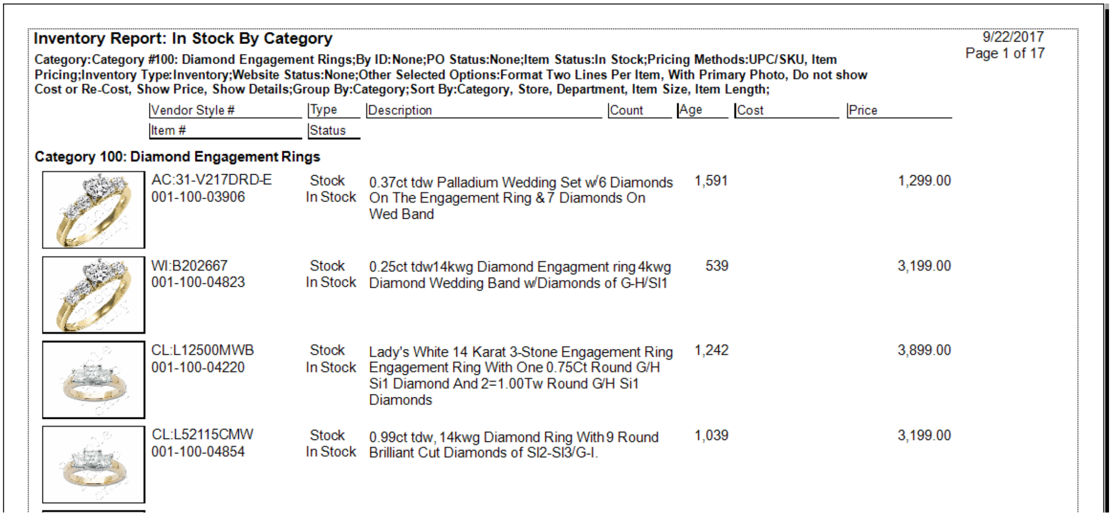
- `Stone Shape`
- `Stone Type`
- `Stone Weight (sort only)`
- `Stone Size (sort only)`

7.4.1 In Stock and Sold Report

These reports show inventory in stock or sold by category, by vendor, by location, or by customer. These reports require similar query parameters, but are automatically set to narrow results. Note that unlike the **Showing Returns** report, this report's primary filter is the current item status. So if it has been returned, it will not show as sold. For more about report filters and settings, see the section entitled Creating a Report and the high-level section entitled Inventory Reports.

7.4.1.1 In Stock by Category Report

The **In Stock by Category** report automatically lists and sorts items by category.



Inventory Report: In Stock By Category

9/22/2017
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Category:Category #100: Diamond Engagement Rings;By ID:None;PO Status:None;Item Status:In Stock;Pricing Methods:UPC/SKU, Item Pricing;Inventory Type:Inventory;Website Status:None;Other Selected Options:Format Two Lines Per Item, With Primary Photo, Do not show Cost or Re-Cost, Show Price, Show Details;Group By:Category;Sort By:Category, Store, Department, Item Size, Item Length;

Category 100: Diamond Engagement Rings

Vendor Style # Item #	Type Status	Description	Count	Age	Cost	Price
AC:31-V217DRD-E 001-100-03906	Stock In Stock	0.37ct tdw Palladium Wedding Set w/6 Diamonds On The Engagement Ring & 7 Diamonds On Wed Band		1,591		1,299.00
WI:B202667 001-100-04823	Stock In Stock	0.25ct tdw14kwg Diamond Engagment ring 4kwg Diamond Wedding Band w/Diamonds of G-H/SI1		539		3,199.00
CL:L12500MWB 001-100-04220	Stock In Stock	Lady's White 14 Karat 3-Stone Engagement Ring Engagement Ring With One 0.75Ct Round G/H Si1 Diamond And 2=1.00Tw Round G/H Si1 Diamonds		1,242		3,899.00
CL:L52115CMW 001-100-04854	Stock In Stock	0.99ct tdw, 14kwg Diamond Ring With 9 Round Brilliant Cut Diamonds of SI2-SI3/G-I.		1,039		3,199.00

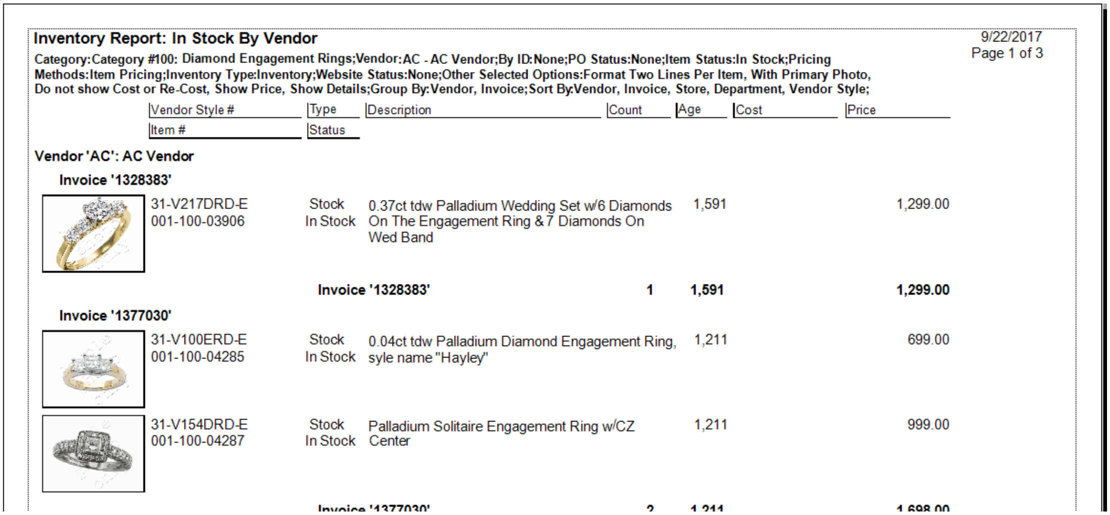
Data fields in the **In Stock by Category** report include:

Vendor Style #	The vendor and style number.
Item #	The item number.
Type	Inventory type (regular stock, consignment, memo, special order, etc.).
Status	Inventory status (in stock, sold, on layaway, etc.).

Description	A description of the item.
Count	Number in stock, only in subtotals.
Age	The length of time the item has been in stock.
Cost	Cost of item to store.
Price	Retail price of item.

7.4.1.2 In Stock by Vendor Report

The **In Stock by Vendor** report automatically lists and sorts items by vendor.



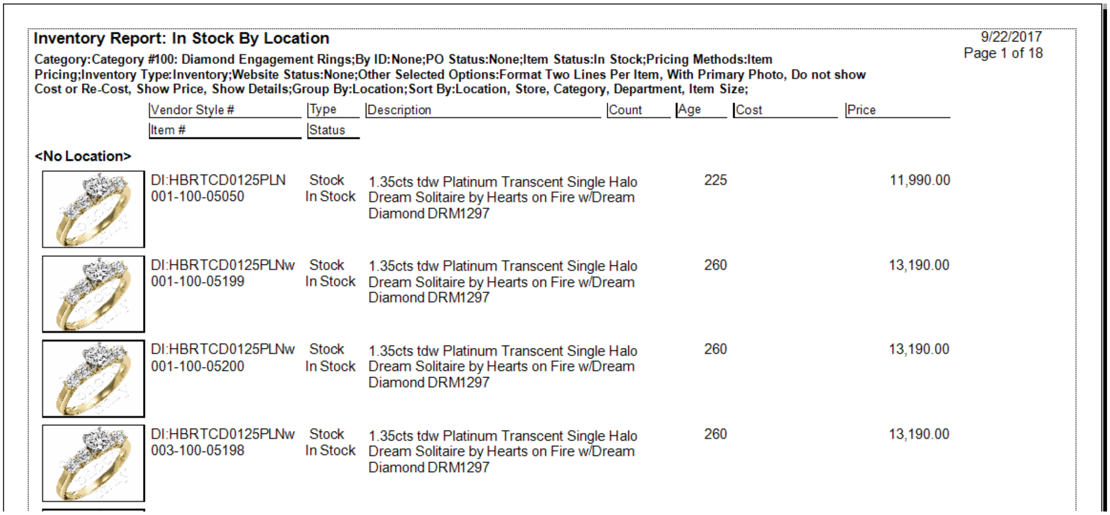
```
Inventory Report: In Stock By Vendor                                                              9/22/2017
Category:Category #100: Diamond Engagement Rings;Vendor:AC - AC Vendor;By ID:None;PO Status:None;Item Status:In Stock;Pricing    Page 1 of 3
Methods:Item Pricing;Inventory Type:Inventory;Website Status:None;Other Selected Options:Format Two Lines Per Item, With Primary Photo,
Do not show Cost or Re-Cost, Show Price, Show Details;Group By:Vendor, Invoice;Sort By:Vendor, Invoice, Store, Department, Vendor Style;
             Vendor Style #     Type      Description                          Count   Age     Cost     Price
             Item #             Status
Vendor 'AC': AC Vendor
   Invoice '1328383'
             31-V217DRD-E       Stock     0.37ct tdw Palladium Wedding Set w/6 Diamonds   1,591             1,299.00
             001-100-03906      In Stock  On The Engagement Ring & 7 Diamonds On
                                          Wed Band

                                Invoice '1328383'                       1      1,591             1,299.00
   Invoice '1377030'
             31-V100ERD-E       Stock     0.04ct tdw Palladium Diamond Engagement Ring,   1,211               699.00
             001-100-04285      In Stock  syle name "Hayley"

             31-V154DRD-E       Stock     Palladium Solitaire Engagement Ring w/CZ        1,211               999.00
             001-100-04287      In Stock  Center

                                Invoice '1377030'                       2      1,211             1,698.00
```

Data fields in the **In Stock by Vendor** report include:

Vendor Style #	The vendor and style number.
Item #	The item number.
Type	Inventory type (regular stock, consignment, memo, special order, etc.).
Status	Inventory status (in stock, sold, on layaway, etc.).
Description	A description of the item.
Count	Number in stock, in subtotals.
Age	The length of time the item has been in stock.
Cost	Cost of item to store.
Price	Retail price of item.

7.4.1.3 In Stock by Location Report

The **In Stock by Location** report automatically lists and sorts items based on where they are located within the store.



Inventory Report: In Stock By Location

9/22/2017
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Category:Category #100: Diamond Engagement Rings;By ID:None;PO Status:None;Item Status:In Stock;Pricing Methods:Item Pricing;Inventory Type:Inventory;Website Status:None;Other Selected Options:Format Two Lines Per Item, With Primary Photo, Do not show Cost or Re-Cost, Show Price, Show Details;Group By:Location;Sort By:Location, Store, Category, Department, Item Size;

<No Location>

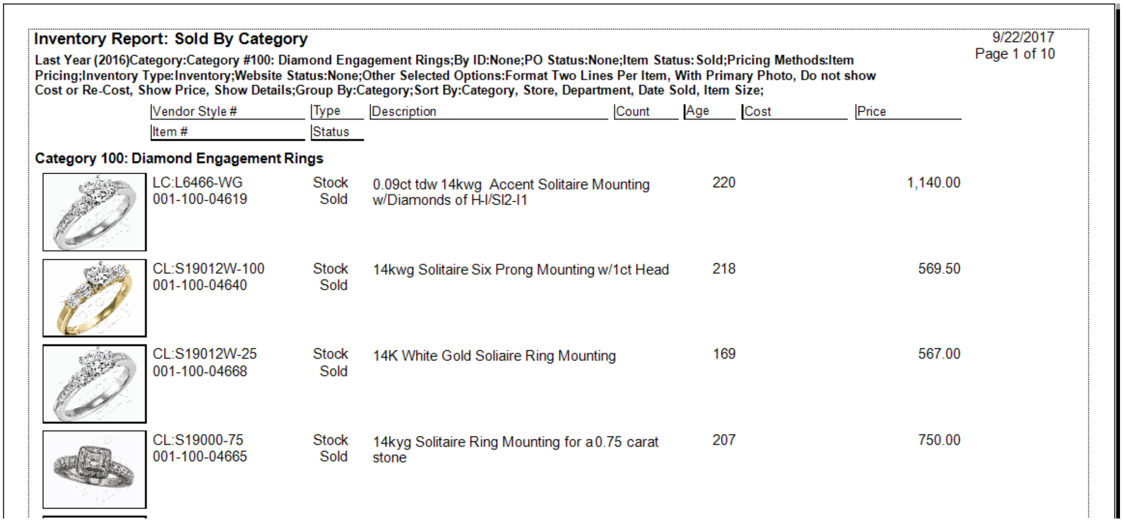
Vendor Style # Item #	Type Status	Description	Count	Age	Cost	Price
DI:HBRTCD0125PLN 001-100-05050	Stock In Stock	1.35cts tdw Platinum Transcent Single Halo Dream Solitaire by Hearts on Fire w/Dream Diamond DRM1297		225		11,990.00
DI:HBRTCD0125PLNw 001-100-05199	Stock In Stock	1.35cts tdw Platinum Transcent Single Halo Dream Solitaire by Hearts on Fire w/Dream Diamond DRM1297		260		13,190.00
DI:HBRTCD0125PLNw 001-100-05200	Stock In Stock	1.35cts tdw Platinum Transcent Single Halo Dream Solitaire by Hearts on Fire w/Dream Diamond DRM1297		260		13,190.00
DI:HBRTCD0125PLNw 003-100-05198	Stock In Stock	1.35cts tdw Platinum Transcent Single Halo Dream Solitaire by Hearts on Fire w/Dream Diamond DRM1297		260		13,190.00

Data fields in the **In Stock by Location** report include:

Vendor Style #	The vendor and style number.
Item #	The item number.
Type	Inventory type (regular stock, consignment, memo, special order, etc.).
Status	Inventory status (in stock, sold, on layaway, etc.).
Description	A description of the item.
Count	Number in stock, in subtotals.
Age	The length of time the item has been in stock.
Cost	Cost of item to store.
Price	Retail price of item.

7.4.1.4 Sold by Category Report

The **Sold by Category** report automatically lists and sorts the sales of items sorted by category.



Inventory Report: Sold By Category

9/22/2017
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Last Year (2016)Category:Category #100: Diamond Engagement Rings;By ID:None;PO Status:None;Item Status: Sold;Pricing Methods:Item Pricing;Inventory Type:Inventory;Website Status:None;Other Selected Options:Format Two Lines Per Item, With Primary Photo, Do not show Cost or Re-Cost, Show Price, Show Details;Group By:Category;Sort By:Category, Store, Department, Date Sold, Item Size;

Category 100: Diamond Engagement Rings

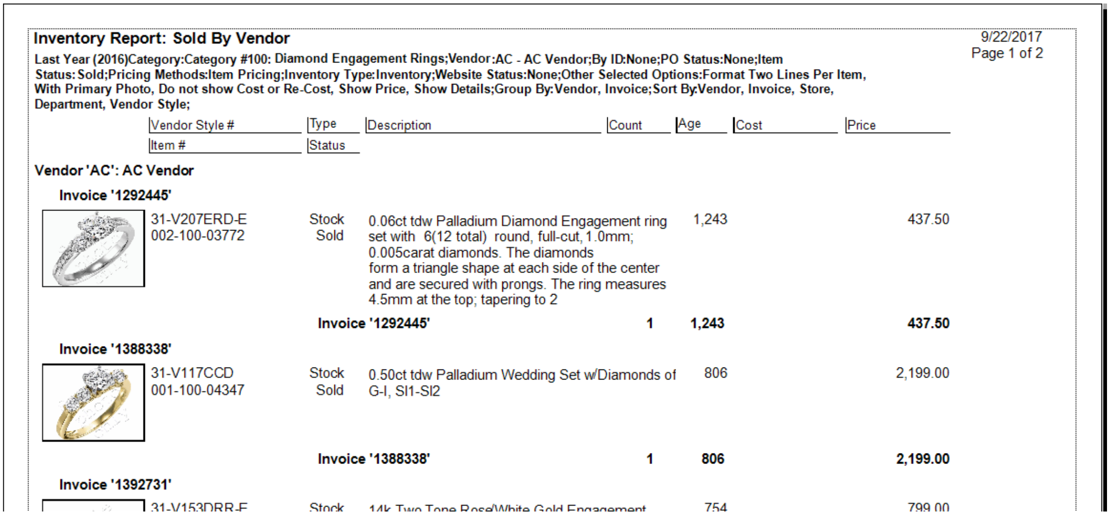
Vendor Style # Item #	Type Status	Description	Count	Age	Cost	Price
LC:L6466-WG 001-100-04619	Stock Sold	0.09ct tdw 14kwg Accent Solitaire Mounting w/Diamonds of H-I/SI2-I1		220		1,140.00
CL:S19012W-100 001-100-04640	Stock Sold	14kwg Solitaire Six Prong Mounting w/1ct Head		218		569.50
CL:S19012W-25 001-100-04668	Stock Sold	14K White Gold Soliaire Ring Mounting		169		567.00
CL:S19000-75 001-100-04665	Stock Sold	14kyg Solitaire Ring Mounting for a 0.75 carat stone		207		750.00

Data fields in the **Sold by Category** report include:

Vendor Style #	The vendor and style number.
Item #	The item number.
Type	Inventory type (regular stock, consignment, memo, special order, etc.).
Status	Inventory status (in stock, sold, on layaway, etc.).
Description	A description of the item.
Count	Number sold, in subtotals.
Age	The length of time the item was in inventory.
Cost	Cost of item to store.
Price	Actual sale price of item.

7.4.1.5 Sold by Vendor Report

The **Sold by Vendor** report automatically lists and sorts the sales of items by vendor.



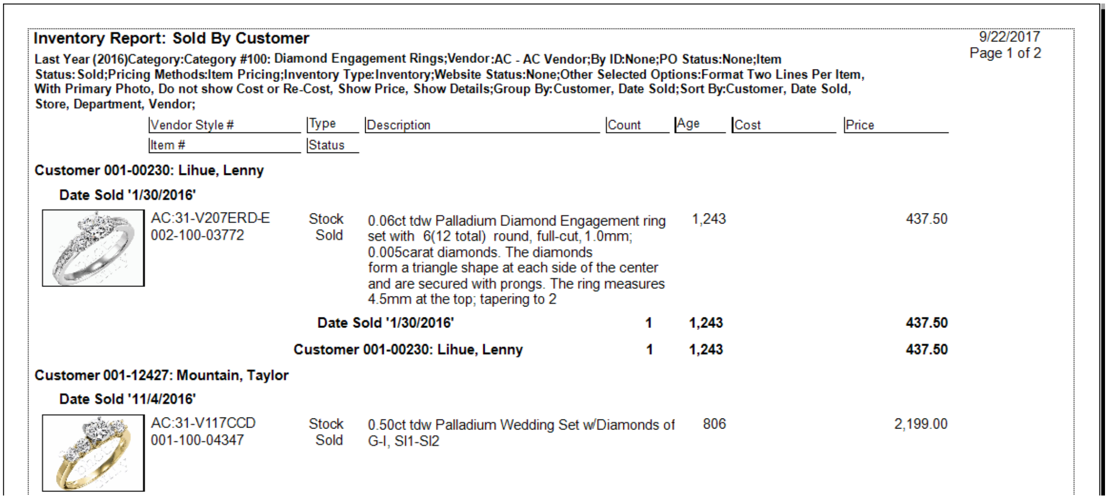
```
Inventory Report:  Sold By Vendor                                                                    9/22/2017
Last Year (2016)Category:Category #100: Diamond Engagement Rings;Vendor:AC - AC Vendor;By ID:None;PO Status:None;Item   Page 1 of 2
Status: Sold;Pricing Methods:Item Pricing;Inventory Type:Inventory;Website Status:None;Other Selected Options:Format Two Lines Per Item,
With Primary Photo, Do not show Cost or Re-Cost, Show Price, Show Details;Group By:Vendor, Invoice;Sort By:Vendor, Invoice, Store,
Department, Vendor Style;
            Vendor Style #    Type   Description                          Count   Age    Cost      Price
            Item #            Status
Vendor 'AC': AC Vendor
  Invoice '1292445'
            31-V207ERD-E      Stock  0.06ct tdw Palladium Diamond Engagement ring    1,243             437.50
            002-100-03772     Sold   set with  6(12 total)  round, full-cut, 1.0mm;
                                     0.005carat diamonds. The diamonds
                                     form a triangle shape at each side of the center
                                     and are secured with prongs. The ring measures
                                     4.5mm at the top; tapering to 2
                         Invoice '1292445'                            1    1,243             437.50
  Invoice '1388338'
            31-V117CCD        Stock  0.50ct tdw Palladium Wedding Set w/Diamonds of   806           2,199.00
            001-100-04347     Sold   G-I, SI1-SI2
                         Invoice '1388338'                            1      806           2,199.00
  Invoice '1392731'
            31-V153DRR-E      Stock  14k Two Tone Rose/White Gold Engagement          754             799.00
```

Data fields in the **Sold by Vendor** report include:

Vendor Style #	The vendor and style number.
Item #	The item number.
Type	Inventory type (regular stock, consignment, memo, special order, etc.).
Status	Inventory status (in stock, sold, on layaway, etc.).
Description	A description of the item.
Count	Number sold, in subtotals.
Age	The length of time the item was in inventory.
Cost	Cost of item to store.
Price	Actual sale price of item.

7.4.1.6 *Sold by Customer Report*

The **Sold by Customer** report automatically lists and sorts the sales of items by customer.



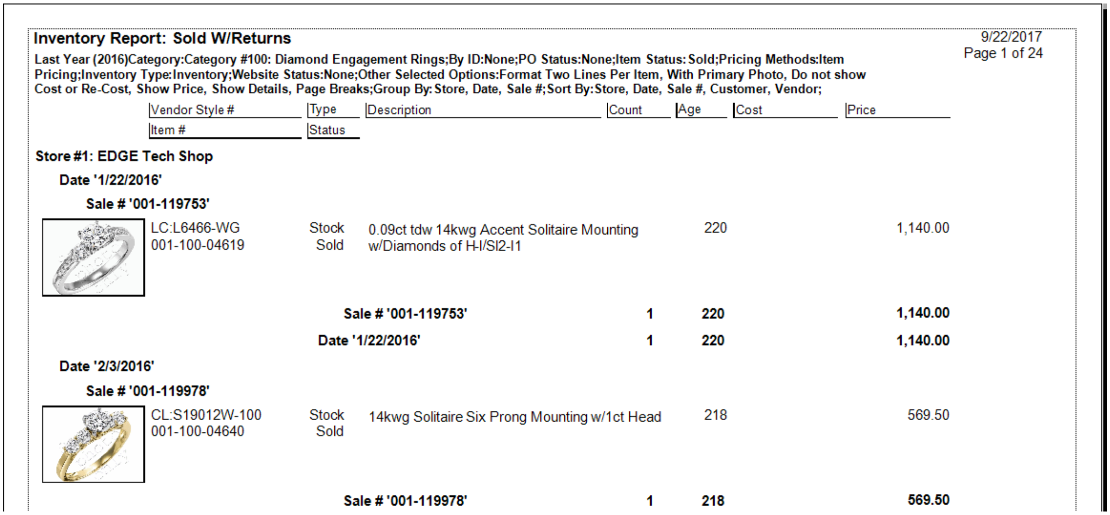
```
Inventory Report:  Sold By Customer                                                                 9/22/2017
Last Year (2016)Category:Category #100: Diamond Engagement Rings;Vendor:AC - AC Vendor;By ID:None;PO Status:None;Item   Page 1 of 2
Status: Sold;Pricing Methods:Item Pricing;Inventory Type:Inventory;Website Status:None;Other Selected Options:Format Two Lines Per Item,
With Primary Photo, Do not show Cost or Re-Cost, Show Price, Show Details;Group By:Customer, Date Sold;Sort By:Customer, Date Sold,
Store, Department, Vendor;
                  Vendor Style #        Type    Description                      Count   Age    Cost          Price
                  Item #                Status
Customer 001-00230: Lihue, Lenny
    Date Sold '1/30/2016'
                  AC:31-V207ERD-E       Stock   0.06ct tdw Palladium Diamond Engagement ring    1,243                 437.50
                  002-100-03772          Sold   set with  6(12 total)  round, full-cut, 1.0mm;
                                                0.005carat diamonds. The diamonds
                                                form a triangle shape at each side of the center
                                                and are secured with prongs. The ring measures
                                                4.5mm at the top; tapering to 2
                                Date Sold '1/30/2016'                      1     1,243                 437.50
                            Customer 001-00230: Lihue, Lenny               1     1,243                 437.50
Customer 001-12427: Mountain, Taylor
    Date Sold '11/4/2016'
                  AC:31-V117CCD         Stock   0.50ct tdw Palladium Wedding Set w/Diamonds of    806               2,199.00
                  001-100-04347          Sold   G-I, SI1-SI2
```

Data fields in the **Sold by Customer** report include:

Vendor Style #	The vendor and style number.
Item #	The item number.
Type	Inventory type (regular stock, consignment, memo, special order, etc.).
Status	Inventory status (in stock, sold, on layaway, etc.).
Description	A description of the item.
Count	Number sold, in subtotal.
Age	The length of time the item was in inventory.
Cost	Cost of item to store.
Price	Actual sale price of item.

7.4.1.7 *Showing Returns*

The **Showing Returns** report shows everything that was sold regardless of whether it was returned at a later date. For example, an item that was sold in the month of May, but returned in the month of June, would still show as sold if this report was run for May alone. Conversely, a standard **Sold Items** report for the month of May would not include an item that has since been returned.



Inventory Report: Sold W/Returns

9/22/2017
Page 1 of 24

Last Year (2016)Category:Category #100: Diamond Engagement Rings;By ID:None;PO Status:None;Item Status: Sold;Pricing Methods:Item Pricing;Inventory Type:Inventory;Website Status:None;Other Selected Options:Format Two Lines Per Item, With Primary Photo, Do not show Cost or Re-Cost, Show Price, Show Details, Page Breaks;Group By: Store, Date, Sale #;Sort By: Store, Date, Sale #, Customer, Vendor;

Vendor Style # Item #	Type Status	Description	Count	Age	Cost	Price
Store #1: EDGE Tech Shop						
Date '1/22/2016'						
Sale # '001-119753'						
LC:L6466-WG 001-100-04619	Stock Sold	0.09ct tdw 14kwg Accent Solitaire Mounting w/Diamonds of H-I/SI2-I1		220		1,140.00
		Sale # '001-119753'	**1**	**220**		**1,140.00**
		Date '1/22/2016'	**1**	**220**		**1,140.00**
Date '2/3/2016'						
Sale # '001-119978'						
CL:S19012W-100 001-100-04640	Stock Sold	14kwg Solitaire Six Prong Mounting w/1ct Head		218		569.50
		Sale # '001-119978'	**1**	**218**		**569.50**

Data fields in the **Showing Returns** report include:

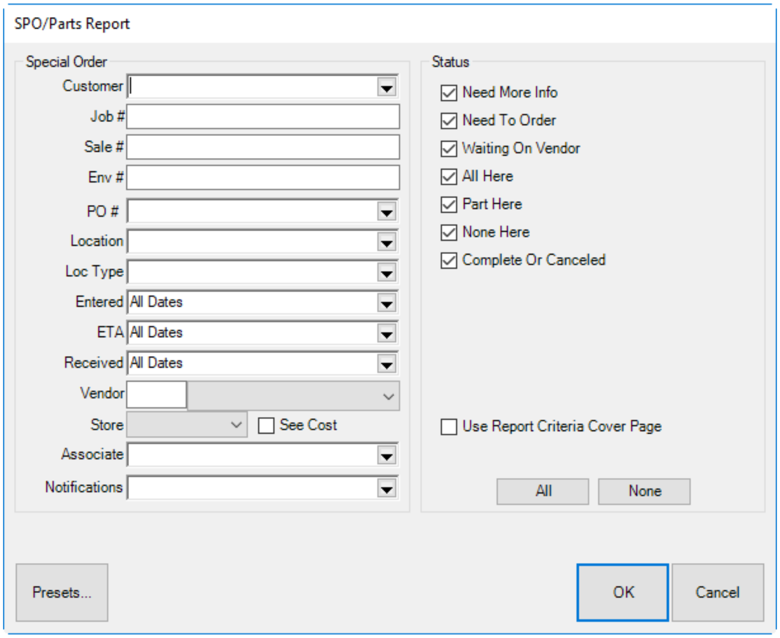
Vendor Style #	The vendor and style number.
Item #	The item number.
Type	Inventory type (regular stock, consignment, memo, special order, etc.).
Status	Inventory status (in stock, sold, on layaway, etc.).
Description	A description of the item.
Count	Number sold, in subtotal.
Age	The length of time the item was in inventory.
Cost	Cost of item to store.
Price	Actual sale price of item.

7.4.2 Ordering Reports

Ordering reports help you evaluate sales and inventory for planning and ordering purposes. They can be used to analyze parts needed for repair and special order, to calculate fast selling merchandise, and can be used to calculate a complete open to buy (OTB). For more about report filters and settings, see the section entitled Creating a Report and the high-level section entitled Inventory Reports.

7.4.2.1 SPO/Parts Report

The **SPO/Parts** report is used to manage parts needed to fill repair jobs as well as custom-order and merchandise needed to complete special orders. The **SPO/Parts** report window allows you to narrow inclusion parameters much as you would for a special order search. For more information, see the section entitled Finding a Special Order Transaction.



SPO/Parts Report

Special Order

Customer:

Job #:

Sale #:

Env #:

PO #:

Location:

Loc Type:

Entered: All Dates

ETA: All Dates

Received: All Dates

Vendor:

Store:

☐ See Cost

Associate:

Notifications:

Status

☑ Need More Info

☑ Need To Order

☑ Waiting On Vendor

☑ All Here

☑ Part Here

☑ None Here

☑ Complete Or Canceled

☐ Use Report Criteria Cover Page

```
SPO/Parts Report                                                                  9/22/2017
                                                                               Page 1 of 23
Other Selected Options:Need More Info, Need To Order, Waiting On Vendor, All Here, Part Here, None Here, Complete Or
Canceled;Group By:Job #;
Job #               #Req #Ord    Entered    Ordered      ETA      RecvdVend Style         Cost/Price
A-001-100-05202-001   1        12/30/2016                                SQ   SY904-002
                                                                                         1,399.00 ★
                    0.02ct tdw 18kwg Semi-mount Engagement Ring w/CZ Center & Diamonds of G-H/SI1
A-001-100-05202-002   1        12/30/2016                                TAC  R0509G5C
                                                                                         2,795.00 ★
                    0.53 Carat Loose Ideal Cut Diamond of F/I1
A-001-100-05202-003   1        12/30/2016                                ANO  sds333
                                                                                            55.00 ★
                    14kW 6 Prong head
A-001-100-05203-001   1        12/30/2016                                SQ   SY904-002
                                                                                         1,399.00 ★
                    0.02ct tdw 18kwg Semi-mount Engagement Ring w/CZ Center & Diamonds of G-H/SI1
```

Data fields in the **Special Order** report include:

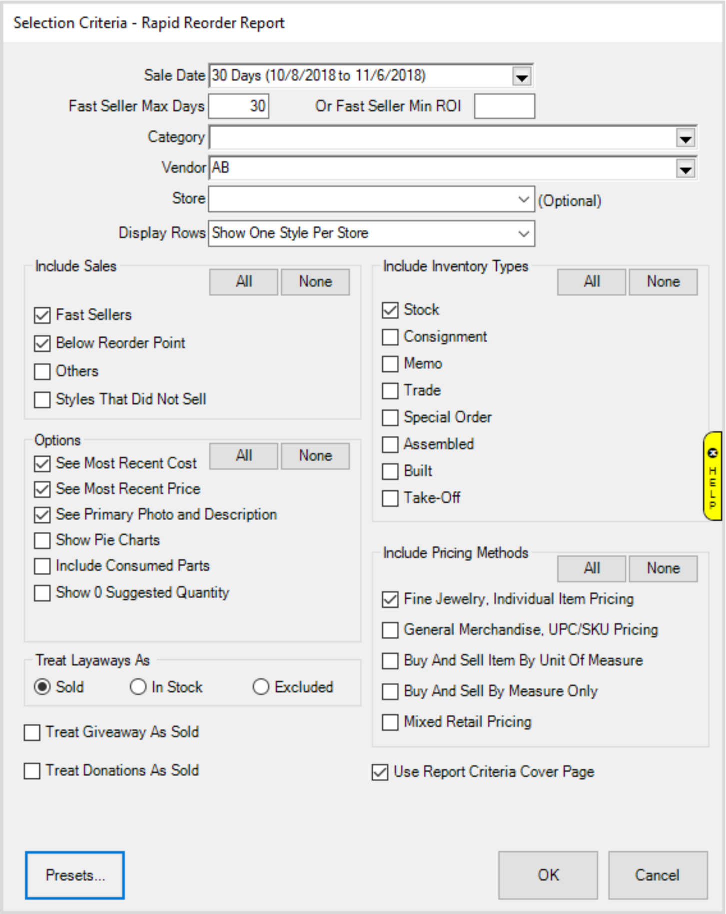
Job #	The ID number for the special order.
# Req	The quantity of the item requested.
#Ord	The quantity of the item ordered.
Entered	Date the special order was created.
Ordered	Date the order was placed.
ETA	The estimated time (date) of arrival.
Recvd	The date the item was received.
Vend	The vendor ID.
Style	The vendor style number.
Cost	The cost of the item.
Price	The price to the customer.

A star in the ETA field of the Special Order report indicates that the date and/or price is promised, not an estimate.

7.4.2.2 Rapid Reorder Report

The **Rapid Reorder** report serves several purposes based on the selection chosen in the **Include Sales** section. To run this report, you must choose at least one checkbox in the **Include Sales** criteria. For example, checking **Fast Sellers** will return only inventory that meets your Fast Seller criteria. The Edge uses your item Levels settings for minimum to be kept in-stock along with the designation as fast seller to ensure your inventory is always at the optimum level. For more information about levels, see the section entitled Inventory Levels.

Additionally, checking multiple options returns all items that match and identifies those items that match multiple criteria.



Selection Criteria - Rapid Reorder Report

Sale Date: 30 Days (10/8/2018 to 11/6/2018)
Fast Seller Max Days: 30
Or Fast Seller Min ROI:
Category:
Vendor: AB
Store: (Optional)
Display Rows: Show One Style Per Store

Include Sales
- ☑ Fast Sellers
- ☑ Below Reorder Point
- ☐ Others
- ☐ Styles That Did Not Sell

Options
- ☑ See Most Recent Cost
- ☑ See Most Recent Price
- ☑ See Primary Photo and Description
- ☐ Show Pie Charts
- ☐ Include Consumed Parts
- ☐ Show 0 Suggested Quantity

Treat Layaways As
● Sold ○ In Stock ○ Excluded

☐ Treat Giveaway As Sold

☐ Treat Donations As Sold

Include Inventory Types
- ☑ Stock
- ☐ Consignment
- ☐ Memo
- ☐ Trade
- ☐ Special Order
- ☐ Assembled
- ☐ Built
- ☐ Take-Off

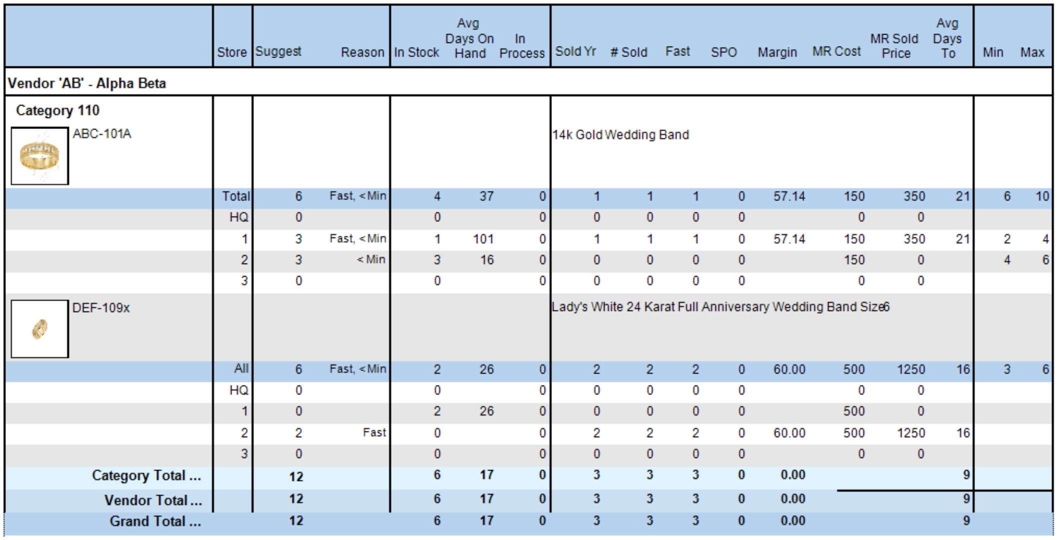
Include Pricing Methods
- ☑ Fine Jewelry, Individual Item Pricing
- ☐ General Merchandise, UPC/SKU Pricing
- ☐ Buy And Sell Item By Unit Of Measure
- ☐ Buy And Sell By Measure Only
- ☐ Mixed Retail Pricing

☑ Use Report Criteria Cover Page

Query options are extensive for the **Rapid Reorder** report:

Sale Date	Allows you to filter by transaction date.

Fast Seller Threshold	Anything that sells in this number of days or fewer is considered a fast seller.
Fast Seller Min ROI	Indicates that items with an ROI of at least this much should be considered a fast seller. This is an alternative to **Fast Seller Threshold**.
Category	Allows you to filter by category.
Vendor	Allows you to filter by vendor.
Store	Allows you to filter by store.
Display Rows	Multi-store only; choose between displaying per company (all stores combined) or per store.
Include Sales	**Fast Sellers –** identifies items that match the fast seller threshold and date range defined at the top of the window. **Below Reorder point –** corresponds with the **Items ► Levels** function in the item record that allows you to set minimum and maximum inventory levels per a specific vendor style. **Others –** allows you to include all sales. **Styles that did not sell –** identifies those items that have had no activity in the selected timeframe.
Include Inventory Types	Allows you to filter by specific inventory types.
Options	Allows you to specify output options.
Include Pricing Methods	Allows you to filter by pricing methods.
Treat Layaways As	Allows you to determine how layaways should be treated for the purposes of this report.
Treat Giveaway as Sold	Indicates that giveaways should be counted as sold items.
Treat Donations as Sold	Indicates that donated items should be counted as sold items.
Use Report Criteria Cover Page	Checked by default, can be unchecked to run just this report in this instance without the criteria cover page. For more about the report criteria cover page, see the section entitled Working with Report Results.



	Store	Suggest	Reason	In Stock	Avg Days On Hand	In Process	Sold Yr	# Sold	Fast	SPO	Margin	MR Cost	MR Sold Price	Avg Days To	Min	Max
Vendor 'AB' - Alpha Beta																
Category 110																
ABC-101A							14k Gold Wedding Band									
	Total	6	Fast, <Min	4	37	0	1	1	1	0	57.14	150	350	21	6	10
	HQ	0		0		0	0	0	0	0		0	0			
	1	3	Fast, <Min	1	101	0	1	1	1	0	57.14	150	350	21	2	4
	2	3	<Min	3	16	0	0	0	0	0		150	0		4	6
	3	0		0		0	0	0	0	0		0	0			
DEF-109x							Lady's White 24 Karat Full Anniversary Wedding Band Size6									
	All	6	Fast, <Min	2	26	0	2	2	2	0	60.00	500	1250	16	3	6
	HQ	0		0		0	0	0	0	0		0	0			
	1	0		2	26	0	0	0	0	0		500	0			
	2	2	Fast	0		0	2	2	2	0	60.00	500	1250	16		
	3	0		0		0	0	0	0	0		0	0			
Category Total ...		**12**		**6**	**17**	**0**	**3**	**3**	**3**	**0**	**0.00**			**9**		
Vendor Total ...		**12**		**6**	**17**	**0**	**3**	**3**	**3**	**0**	**0.00**			**9**		
Grand Total ...		**12**		**6**	**17**	**0**	**3**	**3**	**3**	**0**	**0.00**			**9**		

Data fields in the **Rapid Reorder Report** include:

Vendor	The vendor from whom the item should be ordered.
Category	The item category.
Store	Multi-store only; displays break down by store for each style. The first row of each style will show Totals if managing per store or All if managing by company.
Suggest	The quantity being suggested for order based on Reason. A replacement item will be suggested for each item meeting fast seller thresholds. Additional quantity will be recommended to meet Min levels if set. **Note:** Suggested Fast Sellers are NOT taken into consideration when calculating stock level suggestions. This means if you are out of stock on a particular style, have sold 1 qualifying item fast, and have a minimum level of 2, The Edge will suggest ordering 3. 1 to replace your fast seller and 2 to maintain stock level.
Reason	The reason the style should be ordered. **Fast:** Style met fast seller criteria for this sales period. < **Min:** Style below reorder point.
In Stock	Quantity currently in stock for this style.
Avg Days On Hand	For in stock items, the average number of days they have been in stock.
In Process	The quantity currently queued for order or on order.

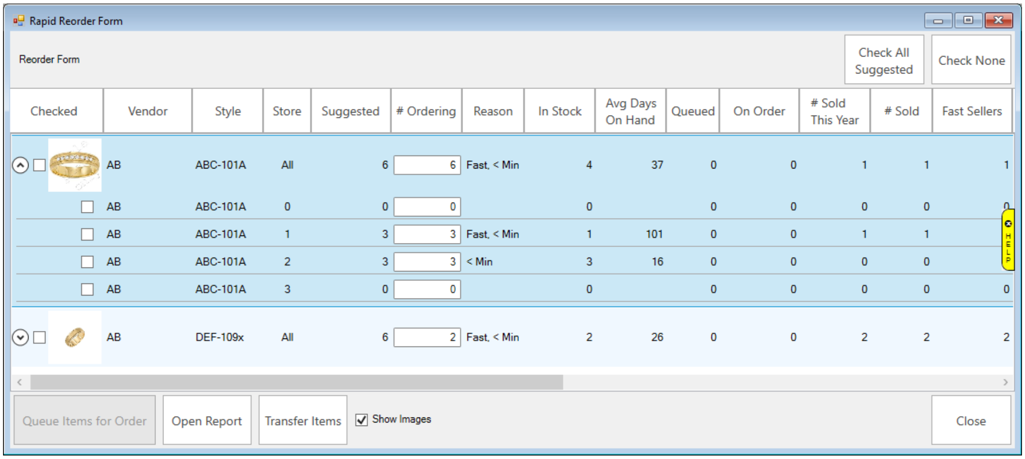
Sold Yr	The number of the item sold this year.
# Sold	The number of the item ever sold.
Fast	Of # **Sold**, the quantity that met fast seller threshold.
SPO	Of # **Sold**, the quantity sold on special order.
Margin	The profit margin on the item.
MR Cost	The cost of the most recent sold item.
MR Sold Price	The retail price of the most recent sold item.
Avg Days to Sell	Of # **Sold**, the number of days in inventory before selling.
Min	The minimum number of this style number to have in inventory at any time. This threshold is set in **Inventory ► Items ► Levels**.
Max	The maximum number of this style number to have in inventory at any time. This threshold is set in **Inventory ► Items ► Levels**.
Category Total	Number of items in the category.
Vendor Total	Number of items by vendor.

7.4.2.3 Reorder Form

The **Reorder** form performs several ordering functions based on the selection chosen in the **Include Sales** section. To run this form, you must choose at least one checkbox in the **Include Sales** criteria. Additionally, checking multiple options will return all items that match either, and also identifies those items that match multiple criteria.

The Rapid Reorder report and form share the same options and return similar results. The report is designed to be printed while the form integrates directly into The Edge ordering system allowing you to easily queue items to be placed on **Purchase Orders**.

See the section entitled Rapid Reorder Report for an explanation of the options used to generate this.



Checked	Vendor	Style	Store	Suggested	# Ordering	Reason	In Stock	Avg Days On Hand	Queued	On Order	# Sold This Year	# Sold	Fast Sellers
☐	AB	ABC-101A	All	6	6	Fast, < Min	4	37	0	0	1	1	1
☐	AB	ABC-101A	0	0	0		0		0	0	0	0	0
☐	AB	ABC-101A	1	3	3	Fast, < Min	1	101	0	0	1	1	
☐	AB	ABC-101A	2	3	3	< Min	3	16	0	0	0	0	
☐	AB	ABC-101A	3	0	0		0		0	0	0	0	0
☐	AB	DEF-109x	All	6	2	Fast, < Min	2	26	0	0	2	2	2

The **Rapid Reorder Form** will generate an interactive form. Data fields in the form include:

Vendor	The vendor from whom the style should be ordered.
Style	The vendor's style number.
Store	Multi-store only; displays break down by store for each style. The first row of each style will show **Totals** if managing per store or **All** if managing by company.
Suggested	The quantity being suggested for order based on **Reason**. A replacement item will be suggested for each item meeting fast seller thresholds. Additional quantity will be recommended to meet **Min** levels if set. **Note:** Suggested Fast Sellers are NOT taken into consideration when calculating stock level suggestions. This means if you are out of stock on a particular style, have sold 1 qualifying item fast, and have a minimum level of 2, The Edge will suggest ordering 3. 1 to replace your fast seller and 2 to maintain stock level.
# Ordering	Used in conjunction with **Queue Items for Order** button at bottom to queue items for placement on POs.
Reason	The reason the style should be ordered. **Fast**: Style met fast seller criteria for this sales period. **< Min**: Style below reorder point.
In Stock	Number currently in stock.
Avg Days On Hand	For in stock items, that average number of days they have been in inventory.
Queued	Number currently queued for order.
On Order	Number currently on order.
# Sold This Year	Total quantity of this item sold this calendar year.

# Sold	Total quantity of this item ever sold.
Fast Sellers	Of # **Sold**, the number that met fast seller threshold.
SPO	Of #**Sold**, the number that were sold on special order.
MR Cost	The cost of the most recently sold item.
Avg Days To Sell	For sold items, the average number of days they were in inventory before being sold.
Min	The minimum quantity as defined by **Levels**.
Max	The max quantity as defined by **Levels**.
Description	Description of this style.

To queue styles for order:

1. Check those styles for order.
2. Enter quantity to order in the # **Ordering** field.
3. Select **Queue Items for Order**. The **Queue items for order** window will appear.
4. Specify quantity to order, choose a category, and select **OK** to complete queuing this style.

Queued styles will be waiting to be placed on Purchase Orders. Use the Retrieve Queued button at the top of the Purchase Order form to add them.

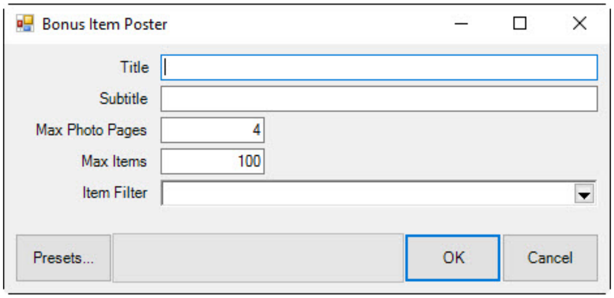
- **Queued styles can be searched and managed via Inventory ► P/O ► Find Orders.**
- **The Rapid Reorder Report and Form are both included in the Inventory Buying Tools function.**

7.4.3 Bonus Poster

When items are assigned a spiff (a bonus for the sales person in terms of percentage of profit margin), you can print a poster highlighting these items to your sales staff. This report is intended to be printed and displayed for your sales associate to inform them of cash incentives for selling individual items. More often than not, the spiff is a means of encouraging your staff to move old inventory.

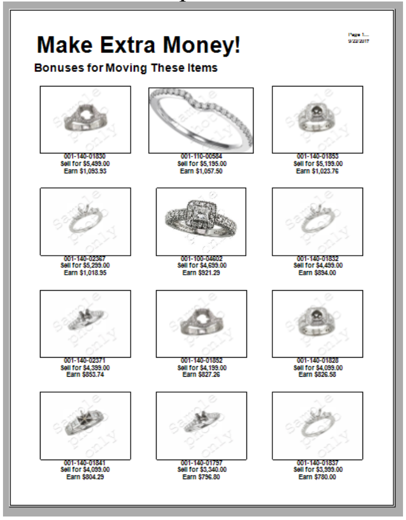
If you pay commissions, the greater of spiff or commission will be paid, but not both.

Items can be assigned a spiff individually by editing the Item Detail from Inventory ► Items or when running inventory repricing from the Administrative menu.



Title
Subtitle
Max Photo Pages 4
Max Items 100
Item Filter

1. Specify a title and subtitle for the poster.
2. Specify the maximum number of photo pages and maximum number of items on the poster.
3. Restrict the poster to certain inventory types or categories by using the **Item Filter**.



Page 1...
9/22/2017

Make Extra Money!

Bonuses for Moving These Items

001-140-01830
Sell for $5,499.00
Earn $1,093.93

001-110-00584
Sell for $5,195.00
Earn $1,057.50

001-140-01853
Sell for $5,199.00
Earn $1,023.76

001-140-02367
Sell for $5,299.00
Earn $1,018.95

001-100-04602
Sell for $4,699.00
Earn $921.29

001-140-01832
Sell for $4,499.00
Earn $894.00

001-140-02371
Sell for $4,399.00
Earn $853.74

001-140-01852
Sell for $4,199.00
Earn $827.26

001-140-01828
Sell for $4,099.00
Earn $826.58

001-140-01841
Sell for $4,099.00
Earn $804.29

001-140-01797
Sell for $3,340.00
Earn $796.80

001-140-01837
Sell for $3,999.00
Earn $780.00

7.4.4 Sign Locations Report

The **Sign Locations** report lists the signs in your store and their locations. This is helpful in tracking changes to signage and ensuring accurate signage. The **Sign Locations** report requires no parameters.

Signage By Location

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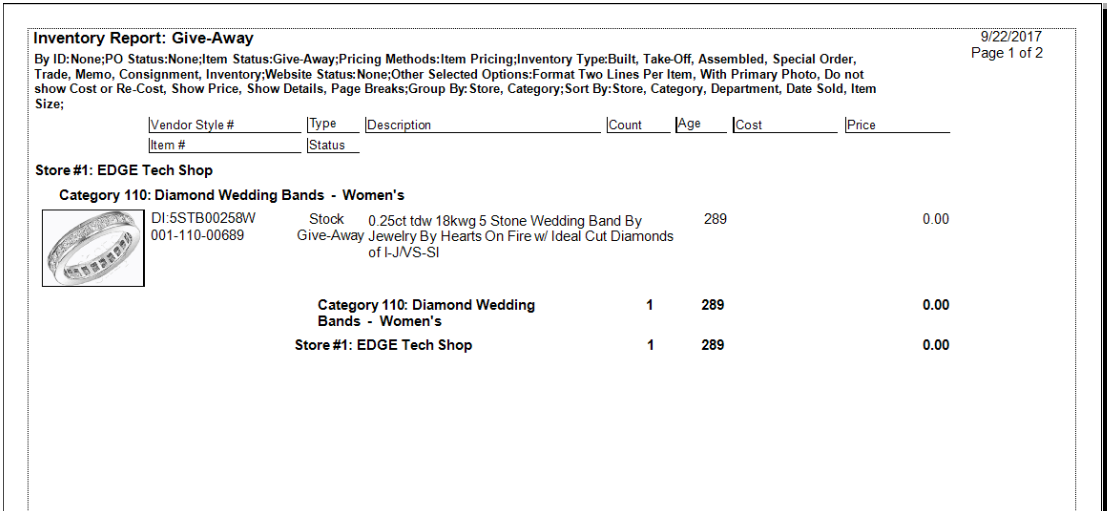
	Item Number	Sign Type	Item Description
	001-150-04644	30% Off	Item modified 12/16/2016 2:52 PM 0.65ct tdw 14kwg Ideal Cut Diamond Stud Earrings of G-H Color and SI2 Clarity.
case 1	001-190-02124	** REMOVE OLD SIGN	Item modified 12/30/2016 7:34 PM 0.23 Carat Loose Marquise Cut Diamond I/SI2
case 10	001-115-01650	30% Off	Item modified 1/31/2017 2:55 PM

Data fields in the **Sign Locations** report include:

Item Number	The item number for which the sign is posted.
Sign Type	The type of sign posted.
Item Description	A description of the item for which the sign is posted.

7.4.5 Giveaway Report

The **Giveaway** report under **Inventory** summarizes promotional giveaways. For more about report filters and settings, see the section entitled Creating a Report and the high-level section entitled Inventory Reports.



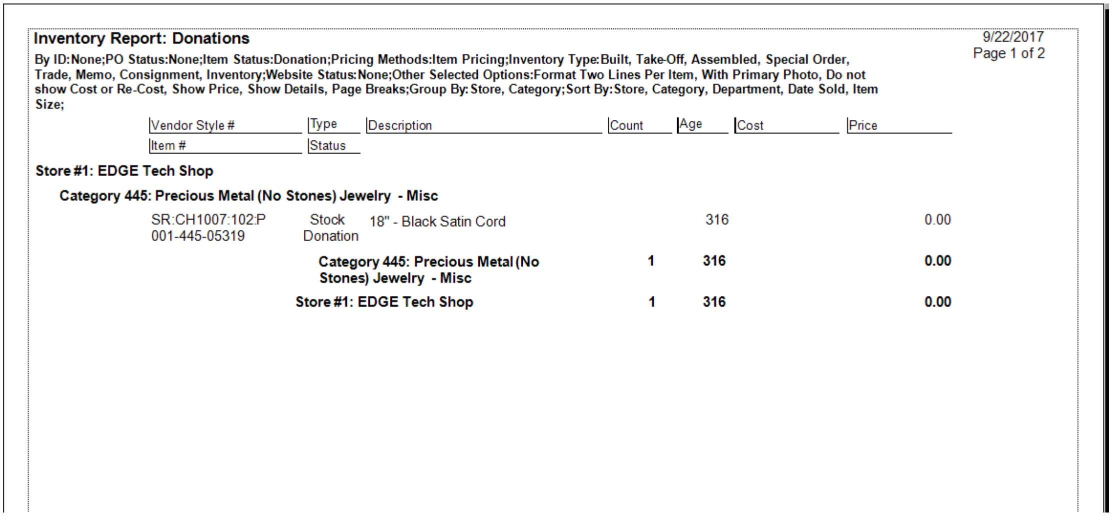
```
Inventory Report: Give-Away                                                                        9/22/2017
By ID:None;PO Status:None;Item Status:Give-Away;Pricing Methods:Item Pricing;Inventory Type:Built, Take-Off, Assembled, Special Order,   Page 1 of 2
Trade, Memo, Consignment, Inventory;Website Status:None;Other Selected Options:Format Two Lines Per Item, With Primary Photo, Do not
show Cost or Re-Cost, Show Price, Show Details, Page Breaks;Group By:Store, Category;Sort By:Store, Category, Department, Date Sold, Item
Size;
                 Vendor Style #        Type       Description                     Count     Age      Cost           Price
                 Item #                Status
Store #1: EDGE Tech Shop
    Category 110: Diamond Wedding Bands  -  Women's
                 DI:5STB00258W          Stock     0.25ct tdw 18kwg 5 Stone Wedding Band By      289                      0.00
                 001-110-00689        Give-Away   Jewelry By Hearts On Fire w/ Ideal Cut Diamonds
                                                  of I-J/VS-SI

                                        Category 110: Diamond Wedding          1       289                      0.00
                                        Bands  -  Women's
                                      Store #1: EDGE Tech Shop                 1       289                      0.00
```

Data fields in the **Giveaway** report include:

Vendor Style #	The vendor and style number.
Item #	The item number.
Type	Inventory type (regular stock, consignment, memo, special order, etc.).
Status	Inventory status (in stock, sold, on layaway, etc.).
Description	A description of the item.
Count	Number sold, in subtotal.
Age	The length of time the item was in inventory.
Cost	Cost of item to store.
Price	Actual sale price of item.

7.4.6 Donations Report

The **Donations** report summarizes donation activity. For more about report filters and settings, see the section entitled Creating a Report and the high-level section entitled Inventory Reports.



Inventory Report: Donations

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By ID:None;PO Status:None;Item Status:Donation;Pricing Methods:Item Pricing;Inventory Type:Built, Take-Off, Assembled, Special Order, Trade, Memo, Consignment, Inventory;Website Status:None;Other Selected Options:Format Two Lines Per Item, With Primary Photo, Do not show Cost or Re-Cost, Show Price, Show Details, Page Breaks;Group By:Store, Category;Sort By:Store, Category, Department, Date Sold, Item Size;

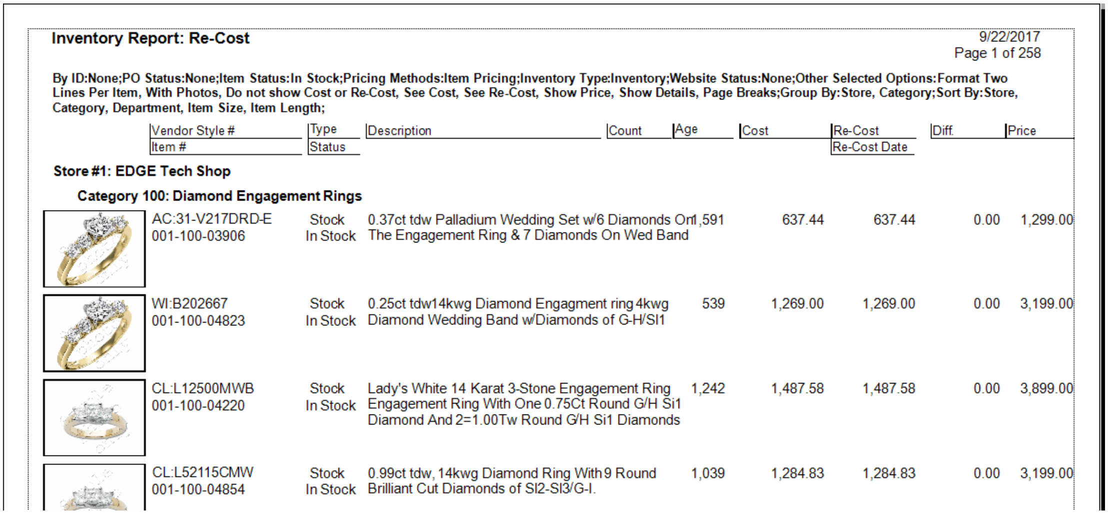
Vendor Style # Item #	Type Status	Description	Count	Age	Cost	Price
Store #1: EDGE Tech Shop						
Category 445: Precious Metal (No Stones) Jewelry - Misc						
SR:CH1007:102:P 001-445-05319	Stock Donation	18" - Black Satin Cord		316		0.00
		Category 445: Precious Metal (No Stones) Jewelry - Misc	**1**	**316**		**0.00**
		Store #1: EDGE Tech Shop	**1**	**316**		**0.00**

Data fields in the **Donations** report include:

Vendor Style #	The vendor and style number.
Item #	The item number.
Type	Inventory type (regular stock, consignment, memo, special order, etc.).
Status	Inventory status (in stock, sold, on layaway, etc.).
Description	A description of the item.
Count	Number sold, in subtotal.
Age	The length of time the item was in inventory.
Cost	Cost of item to store.
Price	Actual sale price of item.

7.4.7 Re-Cost Report

The **Re-Cost** report provides details concerning re-cost activities. For more about report filters and settings, see the section entitled Creating a Report and the high-level section entitled Inventory Reports.



Inventory Report: Re-Cost

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By ID:None;PO Status:None;Item Status:In Stock;Pricing Methods:Item Pricing;Inventory Type:Inventory;Website Status:None;Other Selected Options:Format Two Lines Per Item, With Photos, Do not show Cost or Re-Cost, See Cost, See Re-Cost, Show Price, Show Details, Page Breaks;Group By:Store, Category;Sort By:Store, Category, Department, Item Size, Item Length;

Store #1: EDGE Tech Shop

Category 100: Diamond Engagement Rings

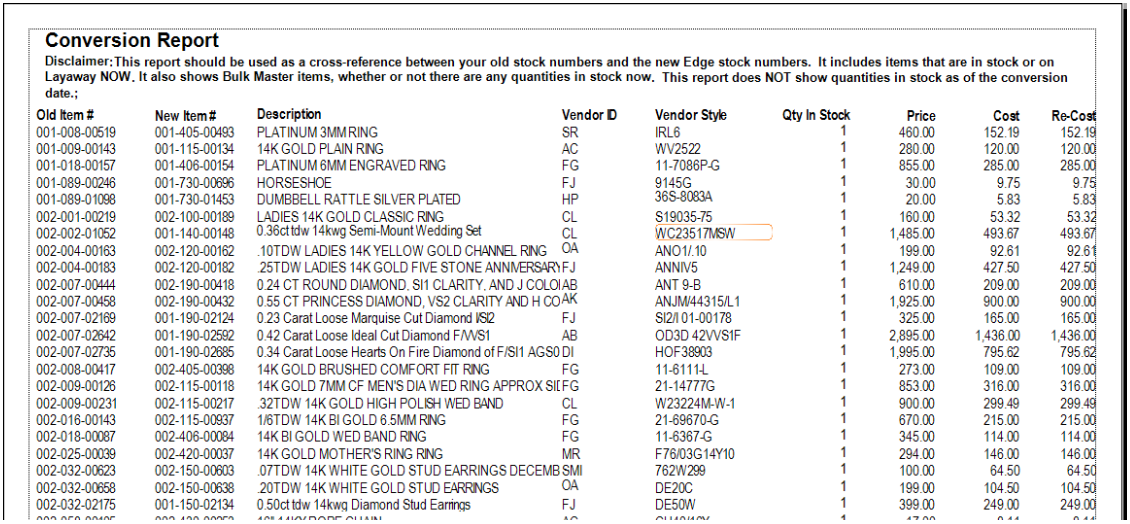
Vendor Style # Item #	Type Status	Description	Count	Age	Cost	Re-Cost Re-Cost Date	Diff	Price
AC:31-V217DRD-E 001-100-03906	Stock In Stock	0.37ct tdw Palladium Wedding Set w/6 Diamonds On The Engagement Ring & 7 Diamonds On Wed Band		1,591	637.44	637.44	0.00	1,299.00
WI:B202667 001-100-04823	Stock In Stock	0.25ct tdw14kwg Diamond Engagment ring 4kwg Diamond Wedding Band w/Diamonds of G-H/SI1		539	1,269.00	1,269.00	0.00	3,199.00
CL:L12500MWB 001-100-04220	Stock In Stock	Lady's White 14 Karat 3-Stone Engagement Ring Engagement Ring With One 0.75Ct Round G/H Si1 Diamond And 2=1.00Tw Round G/H Si1 Diamonds		1,242	1,487.58	1,487.58	0.00	3,899.00
CL:L52115CMW 001-100-04854	Stock In Stock	0.99ct tdw, 14kwg Diamond Ring With 9 Round Brilliant Cut Diamonds of SI2-SI3/G-I.		1,039	1,284.83	1,284.83	0.00	3,199.00

Data fields in the **Re-Cost** report include:

Vendor Style #	The vendor and style number.
Item #	The item number.
Type	Inventory type (regular stock, consignment, memo, special order, etc.).
Status	Inventory status (in stock, sold, on layaway, etc.).
Description	A description of the item.
Count	Number sold, in subtotal.
Age	The length of time the item was in inventory.
Cost	Cost of item to store.
Re-Cost	The re-cost amount.
Re-Cost Date	The date the re-costing was done.
Diff	The difference between the cost and the re-cost.
Price	Actual sale price of item.

7.4.8 Conversion Report

The **Conversion** report assists in the conversion from an old item number system to a new one.



Conversion Report

Disclaimer:This report should be used as a cross-reference between your old stock numbers and the new Edge stock numbers. It includes items that are in stock or on Layaway NOW. It also shows Bulk Master items, whether or not there are any quantities in stock now. This report does NOT show quantities in stock as of the conversion date.;

Old Item #	New Item #	Description	Vendor ID	Vendor Style	Qty In Stock	Price	Cost	Re-Cost
001-008-00519	001-405-00493	PLATINUM 3MM RING	SR	IRL6	1	460.00	152.19	152.19
001-009-00143	001-115-00134	14K GOLD PLAIN RING	AC	WV2522	1	280.00	120.00	120.00
001-018-00157	001-406-00154	PLATINUM 6MM ENGRAVED RING	FG	11-7086P-G	1	855.00	285.00	285.00
001-089-00246	001-730-00696	HORSESHOE	FJ	9145G	1	30.00	9.75	9.75
001-089-01098	001-730-01453	DUMBBELL RATTLE SILVER PLATED	HP	36S-8083A	1	20.00	5.83	5.83
002-001-00219	002-100-00189	LADIES 14K GOLD CLASSIC RING	CL	S19035-75	1	160.00	53.32	53.32
002-002-01052	001-140-00148	0.36ct tdw 14kwg Semi-Mount Wedding Set	CL	WC23517MSW	1	1,485.00	493.67	493.67
002-004-00163	002-120-00162	.10TDW LADIES 14K YELLOW GOLD CHANNEL RING	OA	ANO1/.10	1	199.00	92.61	92.61
002-004-00183	002-120-00182	.25TDW LADIES 14K GOLD FIVE STONE ANNIVERSAR	FJ	ANNIV5	1	1,249.00	427.50	427.50
002-007-00444	002-190-00418	0.24 CT ROUND DIAMOND, SI1 CLARITY, AND J COLO	AB	ANT 9-B	1	610.00	209.00	209.00
002-007-00458	002-190-00432	0.55 CT PRINCESS DIAMOND, VS2 CLARITY AND H CO	AK	ANJM/44315/L1	1	1,925.00	900.00	900.00
002-007-02169	001-190-02124	0.23 Carat Loose Marquise Cut Diamond I/SI2	FJ	SI2/I 01-00178	1	325.00	165.00	165.00
002-007-02642	001-190-02592	0.42 Carat Loose Ideal Cut Diamond F/VVS1	AB	OD3D 42VVS1F	1	2,895.00	1,436.00	1,436.00
002-007-02735	001-190-02685	0.34 Carat Loose Hearts On Fire Diamond of F/SI1 AGS0	DI	HOF38903	1	1,995.00	795.62	795.62
002-008-00417	002-405-00398	14K GOLD BRUSHED COMFORT FIT RING	FG	11-6111-L	1	273.00	109.00	109.00
002-009-00126	002-115-00118	14K GOLD 7MM CF MEN'S DIA WED RING APPROX SI	FG	21-14777G	1	853.00	316.00	316.00
002-009-00231	002-115-00217	.32TDW 14K GOLD HIGH POLISH WED BAND	CL	W23224M-W-1	1	900.00	299.49	299.49
002-016-00143	002-115-00937	1/6TDW 14K BI GOLD 6.5MM RING	FG	21-69670-G	1	670.00	215.00	215.00
002-018-00087	002-406-00084	14K BI GOLD WED BAND RING	FG	11-6367-G	1	345.00	114.00	114.00
002-025-00039	002-420-00037	14K GOLD MOTHER'S RING RING	MR	F76/03G14Y10	1	294.00	146.00	146.00
002-032-00623	002-150-00603	.07TDW 14K WHITE GOLD STUD EARRINGS DECEMB	SMI	762W299	1	100.00	64.50	64.50
002-032-00658	002-150-00638	.20TDW 14K WHITE GOLD STUD EARRINGS	OA	DE20C	1	199.00	104.50	104.50
002-032-02175	001-150-02134	0.50ct tdw 14kwg Diamond Stud Earrings	FJ	DE50W	1	399.00	249.00	249.00

Data fields in the **Conversion** report include:

Old Item#	The old item number.
New Item#	The new item number.
Description	A description of the item.
Vendor ID	The vendor's ID.
Vendor Style	The vendor's style number.
Price	The price of the item.
Cost	The cost of the item.

7.4.9 Performance By Reports

Performance reports provide a detailing of sales activity by various parameters to help determine profitability.

The reports generated are statistical in nature and are useful in determining sales success or failure broken down by category or vendor as well as price point and age. The reports print in descending order, starting with the top selling and ending with the bottom selling based on percentage of sales.

Additionally, the report calculates ROI for each price point, category, vendor, and a grand total for the store. Any price point falling below the stores overall average ROI will appear in a salmon color.

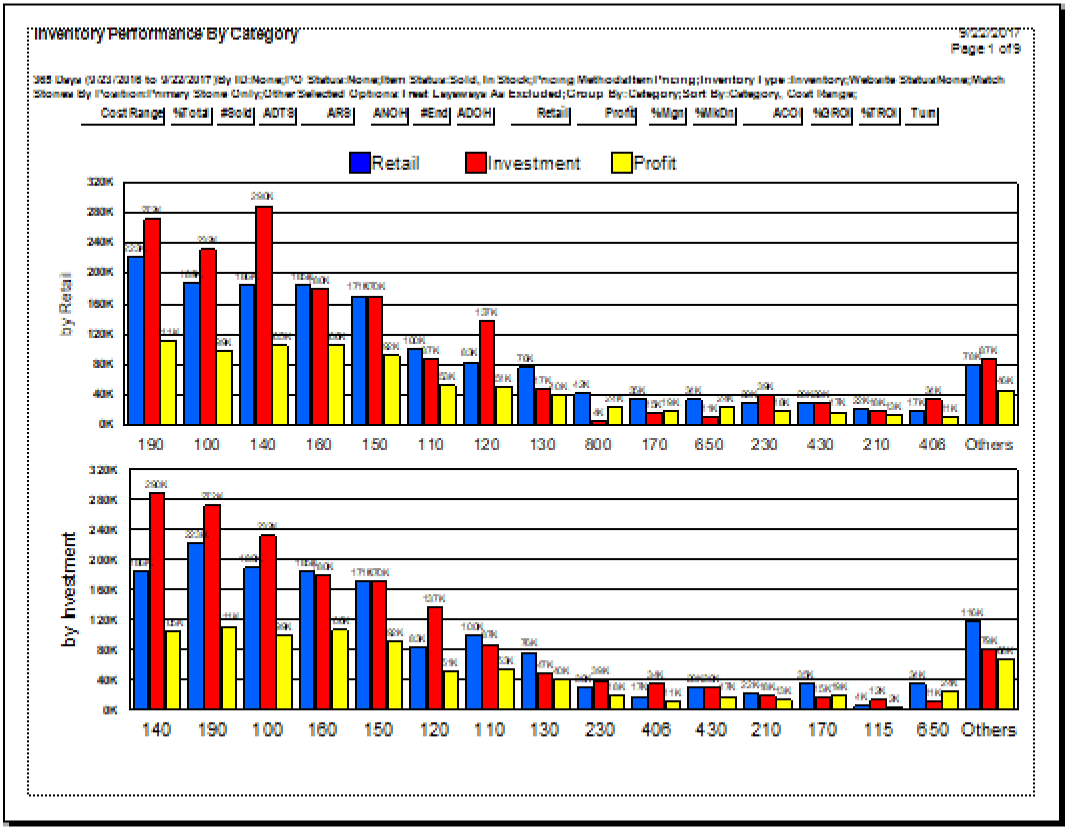
For more about report filters and settings, see the section entitled Creating a Report and the high-level section entitled Inventory Reports.

Performance reports can be generated by:

Category	Performance of items in each category.
Category By Age	Performance of items in each category and by how long they've been in stock.
Category By AIMS	Performance of items by category based on the date ranges set for Automatic Mark Down per category. Your settings impact these results.
Vendor	Performance of items provided by each vendor.
Vendor & Age	Performance of items provided by each vendor and by how long they've been in stock.
Age Only	Performance of items only by how long they've been in stock.
Percentiles	Performance of inventory based on user defined selection criteria. This report differs from the other inventory performance reports and as thus is explained separately below.

Each result is provided in two forms: a bar chart and a table. Within each report, a listing of parameters selected for the report is provided along the top.

7.4.9.1 Performance Report Bar Chart



Inventory Performance By Category

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365 Days (9/23/2016 to 9/22/2017);By ID:None;PO Status:None;Item Status:Sold, In Stock;Pricing Method:Item Pricing;Inventory Type:Inventory;Website Status:None;Match Stones By Position:Primary Stone Only;Other Selected Options: Treat Layaways As Excluded;Group By:Category;Sort By:Category, Cost Range;

Cost Range | %Total | #Sold | ADTS | ARS | ANOH | #End | ADOH | Retail | Profit | %Mgn | %MkDn | ACOI | %GROI | %TROI | Turn

The bar chart results show at a glance how the designated grouping performed. First, a chart of performance based on the retail price of the items is presented. Next, performance based on the investment or cost of goods sold is presented. It might be useful to change categories or vendors or work with different sort orders to present that data in a variety of ways. In these two bar charts, the first is ordered by categories or vendors with the highest retail sales. The second is ordered by categories or vendors with the highest dollar investment. Detail area is presented as follows:

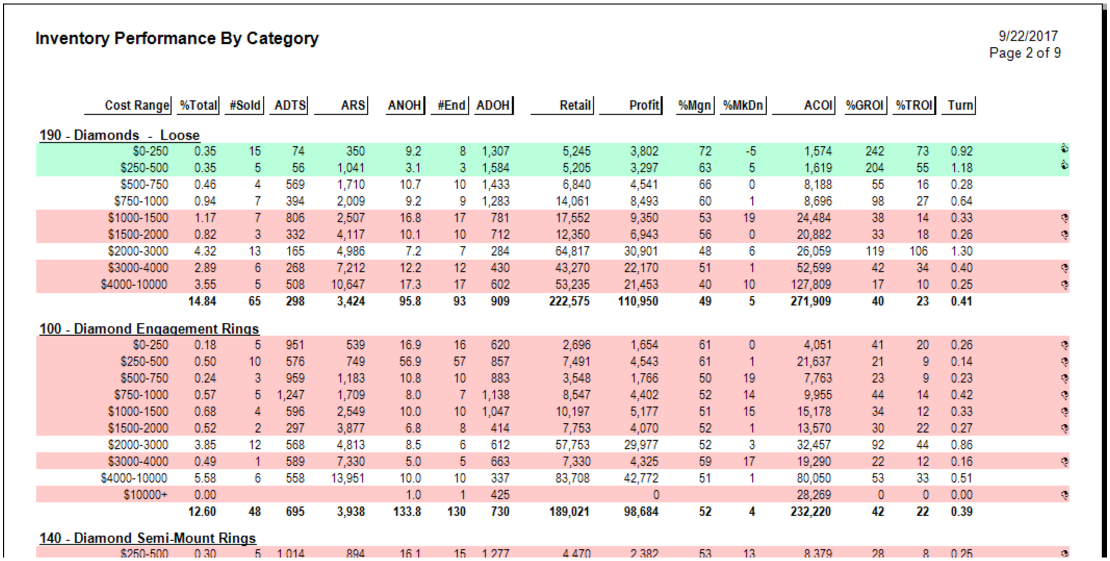
A These are column headers to be used in the table portion of the report. See the description below.

B This is the dollar amount.

C These are performance by category or vendor. For each category, there are three bars:

- Blue is retail sales.
- Red is average dollars invested in the inventory for this category.
- Yellow is the amount of profit generated.

7.4.9.2 Performance Report Table



Inventory Performance By Category

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Cost Range	%Total	#Sold	ADTS	ARS	ANOH	#End	ADOH	Retail	Profit	%Mgn	%MkDn	ACOI	%GROI	%TROI	Turn	
190 - Diamonds - Loose																
$0-250	0.35	15	74	350	9.2	8	1,307	5,245	3,802	72	-5	1,574	242	73	0.92	👍
$250-500	0.35	5	56	1,041	3.1	3	1,584	5,205	3,297	63	5	1,619	204	55	1.18	👍
$500-750	0.46	4	569	1,710	10.7	10	1,433	6,840	4,541	66	0	8,188	55	16	0.28	
$750-1000	0.94	7	394	2,009	9.2	9	1,283	14,061	8,493	60	1	8,696	98	27	0.64	
$1000-1500	1.17	7	806	2,507	16.8	17	781	17,552	9,350	53	19	24,484	38	14	0.33	👎
$1500-2000	0.82	3	332	4,117	10.1	10	712	12,350	6,943	56	0	20,882	33	18	0.26	👎
$2000-3000	4.32	13	165	4,986	7.2	7	284	64,817	30,901	48	6	26,059	119	106	1.30	
$3000-4000	2.89	6	268	7,212	12.2	12	430	43,270	22,170	51	1	52,599	42	34	0.40	👎
$4000-10000	3.55	5	508	10,647	17.3	17	602	53,235	21,453	40	10	127,809	17	10	0.25	👎
	14.84	**65**	**298**	**3,424**	**95.8**	**93**	**909**	**222,575**	**110,950**	**49**	**5**	**271,909**	**40**	**23**	**0.41**	
100 - Diamond Engagement Rings																
$0-250	0.18	5	951	539	16.9	16	620	2,696	1,654	61	0	4,051	41	20	0.26	👎
$250-500	0.50	10	576	749	56.9	57	857	7,491	4,543	61	1	21,637	21	9	0.14	👎
$500-750	0.24	3	959	1,183	10.8	10	883	3,548	1,766	50	19	7,763	23	9	0.23	👎
$750-1000	0.57	5	1,247	1,709	8.0	7	1,138	8,547	4,402	52	14	9,955	44	14	0.42	👎
$1000-1500	0.68	4	596	2,549	10.0	10	1,047	10,197	5,177	51	15	15,178	34	12	0.33	👎
$1500-2000	0.52	2	297	3,877	6.8	8	414	7,753	4,070	52	1	13,570	30	22	0.27	👎
$2000-3000	3.85	12	568	4,813	8.5	6	612	57,753	29,977	52	3	32,457	92	44	0.86	
$3000-4000	0.49	1	589	7,330	5.0	5	663	7,330	4,325	59	17	19,290	22	12	0.16	👎
$4000-10000	5.58	6	558	13,951	10.0	10	337	83,708	42,772	51	1	80,050	53	33	0.51	
$10000+	0.00				1.0	1	425		0			28,269	0	0	0.00	👎
	12.60	**48**	**695**	**3,938**	**133.8**	**130**	**730**	**189,021**	**98,684**	**52**	**4**	**232,220**	**42**	**22**	**0.39**	
140 - Diamond Semi-Mount Rings																
$250-500	0.30	5	1,014	894	16.1	15	1,277	4,470	2,382	53	13	8,379	28	8	0.25	👎

In the tabular version of the report, data fields include:

Category or Vendor	The category or vendor by which the items are being grouped. This column type will vary depending on the type of report generated.
Cost Range	Each category or vendor can be further broken down by price ranges.
% Total	What percentage of total sales this category or vendor and price point accounts for. It is calculated based on the selling price.
# Sold	The total number of items in that grouping sold.
ADTS	Average days to sell. Of the items sold in this line, the number of days, on average, it took for them to sell.
ARS	Average retail sale.
ANOH	Average number on hand.
#End	Number of items remaining on hand.
ADOH	Average days in stock. Average number of days that unsold items are in inventory.
Retail	The retail price of the items that sold.
Profit	The net profit of the sales from that grouping.
% Margin	The profit margin based on the items that sold.
% Mkdn	The discount that was taken at point of sale marked down from retail.
ACOI	The average value of inventory during the period.

GROI	The gross return on investment for that grouping. If the value is above 150%, it will appear highlighted in green.
TROI	The true return on investment for that grouping. This figure takes into account the full amount of time the item was in stock during the reporting period.
Turn	Number of times that inventory investment turned at cost of goods sold.

7.4.9.3 More on ROI

GROI is gross return on investment and is figured as:

```
Profit ÷ Average Value of Inventory
```

In other words, an item in inventory 6 months will have an average cost of ½ its value, an item entering into a period over 1 year will reflect its full value.

TROI is true return on investment and is figured as:

$$\frac{\text{Profit} \div \text{Average Value of Inventory}}{\text{Average Age of Inventory}}$$

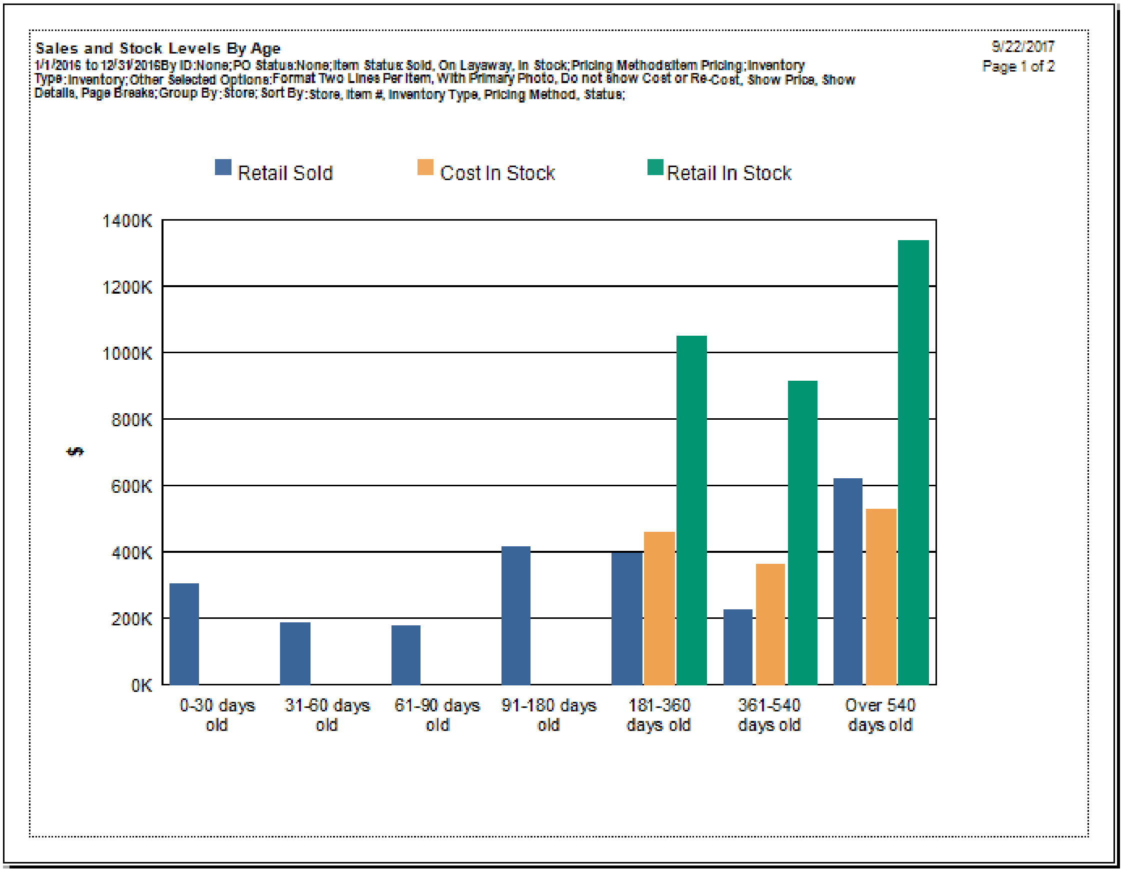
For example, suppose an item costs $100 and sells for $200:

	GROI	**TROI**
Item sold in 6 months	200%	200%
Item sold in 9 months	133%	133%
Item sold in 12 months	100%	100%
Item sold in 18 months	100%	66%
Item sold in 24 months	100%	50%

7.4.10 Sales and Stock Levels by Age Report

The **Sales by Age** report shows amounts of inventory sold and in-stock by length of time in inventory.

The first page contains a graphical representation of the number of items sold by age.



Sales and Stock Levels By Age

1/1/2016 to 12/31/2016By ID:None;PO Status:None;Item Status: Sold, On Layaway, In Stock;Pricing Method:Item Pricing;Inventory Type:Inventory;Other Selected Options:Format Two Lines Per Item, With Primary Photo, Do not show Cost or Re-Cost, Show Price, Show Details, Page Breaks;Group By:Store; Sort By:Store, Item #, Inventory Type, Pricing Method, Status;

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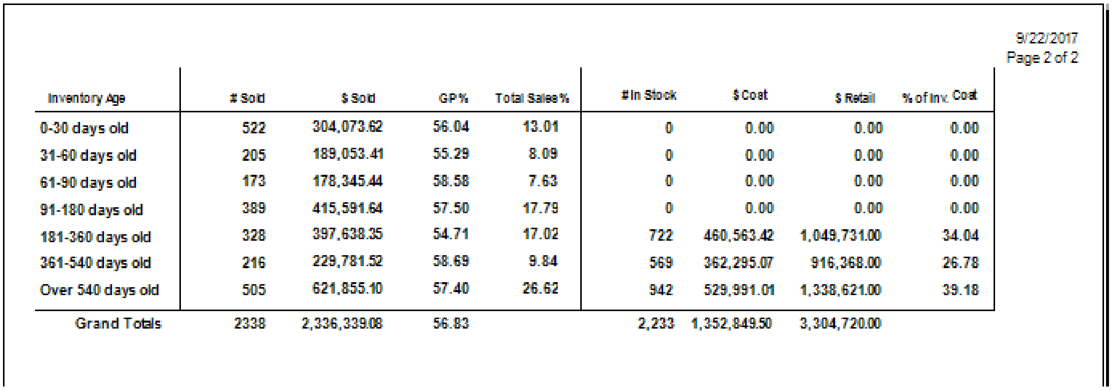
The second page provides the details.



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Inventory Age	# Sold	$ Sold	GP %	Total Sales %	# In Stock	$ Cost	$ Retail	% of Inv. Cost
0-30 days old	522	304,073.62	56.04	13.01	0	0.00	0.00	0.00
31-60 days old	205	189,053.41	55.29	8.09	0	0.00	0.00	0.00
61-90 days old	173	178,345.44	58.58	7.63	0	0.00	0.00	0.00
91-180 days old	389	415,591.64	57.50	17.79	0	0.00	0.00	0.00
181-360 days old	328	397,638.35	54.71	17.02	722	460,563.42	1,049,731.00	34.04
361-540 days old	216	229,781.52	58.69	9.84	569	362,295.07	916,368.00	26.78
Over 540 days old	505	621,855.10	57.40	26.62	942	529,991.01	1,338,621.00	39.18
Grand Totals	2338	2,336,339.08	56.83		2,233	1,352,849.50	3,304,720.00	

Data fields in the **Sales by Age** report include:

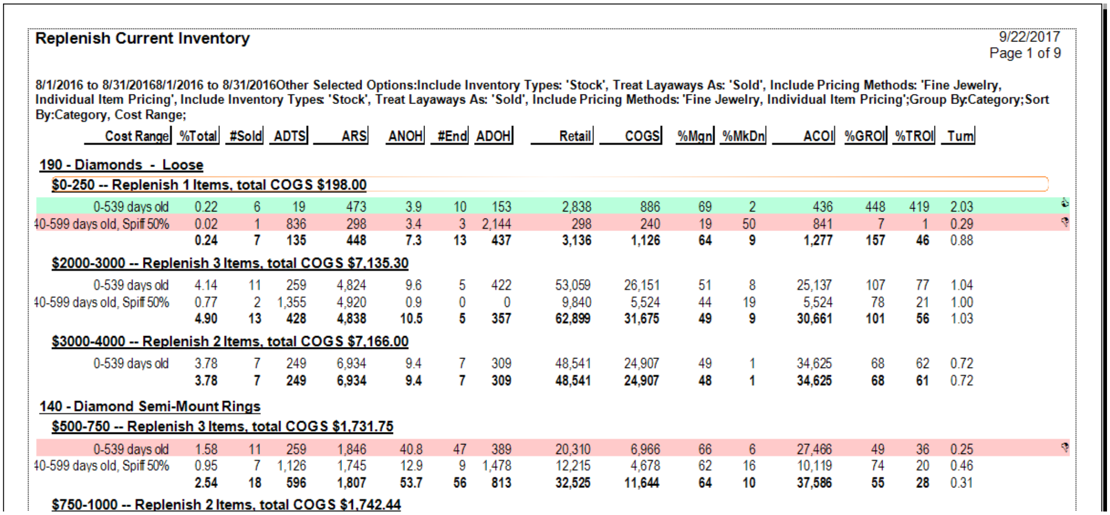
Inventory Age	Groupings of data by age.
# Sold	The number of items sold for that age range for the date range run.
$ Sold	The amount in dollars brought in for those items sold.
GP %	The percentage of gross profit yielded by those sales.
Total Sales %	The percentage of the total sales for the date range yielded by those sales.
# In Stock	The number of items in that age range that are in stock.
$ Cost	The total cost of those items that are on hand.
$ Retail	The total retail value of those items that are on hand.
% of Inv. Cost	The percentage of total inventory that this age group makes up in your inventory.

By looking at these values, you can see how fast sellers are performing against older inventory and plan new inventory accordingly. If you double click on the following data values, you'll get a specific list of items included in the figure to help your further clarify what items are providing the indicated performance.

- # Sold
- $ Sold
- GP %
- Total Sales %
- # On Hand
- $ Cost
- $ Retail
- % of Inv. Cost.

7.4.11 Replenish Current Inventory Report

The **Replenish Current Inventory** report shows categories that performed reasonably well and might make good areas for in which you might consider investing. This report works in concert with the **Replenish Base Stock** report found in the **Inventory Buying Tools** feature.



Replenish Current Inventory

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8/1/2016 to 8/31/20168/1/2016 to 8/31/2016Other Selected Options:Include Inventory Types: 'Stock', Treat Layaways As: 'Sold', Include Pricing Methods: 'Fine Jewelry, Individual Item Pricing', Include Inventory Types: 'Stock', Treat Layaways As: 'Sold', Include Pricing Methods: 'Fine Jewelry, Individual Item Pricing';Group By:Category;Sort By:Category, Cost Range;

Cost Range	%Total	#Sold	ADTS	ARS	ANOH	#End	ADOH	Retail	COGS	%Mgn	%MkDn	ACOI	%GROI	%TROI	Turn
190 - Diamonds - Loose															
$0-250 -- Replenish 1 Items, total COGS $198.00															
0-539 days old	0.22	6	19	473	3.9	10	153	2,838	886	69	2	436	448	419	2.03
40-599 days old, Spiff 50%	0.02	1	836	298	3.4	3	2,144	298	240	19	50	841	7	1	0.29
	0.24	**7**	**135**	**448**	**7.3**	**13**	**437**	**3,136**	**1,126**	**64**	**9**	**1,277**	**157**	**46**	0.88
$2000-3000 -- Replenish 3 Items, total COGS $7,135.30															
0-539 days old	4.14	11	259	4,824	9.6	5	422	53,059	26,151	51	8	25,137	107	77	1.04
40-599 days old, Spiff 50%	0.77	2	1,355	4,920	0.9	0	0	9,840	5,524	44	19	5,524	78	21	1.00
	4.90	**13**	**428**	**4,838**	**10.5**	**5**	**357**	**62,899**	**31,675**	**49**	**9**	**30,661**	**101**	**56**	1.03
$3000-4000 -- Replenish 2 Items, total COGS $7,166.00															
0-539 days old	3.78	7	249	6,934	9.4	7	309	48,541	24,907	49	1	34,625	68	62	0.72
	3.78	**7**	**249**	**6,934**	**9.4**	**7**	**309**	**48,541**	**24,907**	**48**	**1**	**34,625**	**68**	**61**	0.72
140 - Diamond Semi-Mount Rings															
$500-750 -- Replenish 3 Items, total COGS $1,731.75															
0-539 days old	1.58	11	259	1,846	40.8	47	389	20,310	6,966	66	6	27,466	49	36	0.25
40-599 days old, Spiff 50%	0.95	7	1,126	1,745	12.9	9	1,478	12,215	4,678	62	16	10,119	74	20	0.46
	2.54	**18**	**596**	**1,807**	**53.7**	**56**	**813**	**32,525**	**11,644**	**64**	**10**	**37,586**	**55**	**28**	0.31
$750-1000 -- Replenish 2 Items, total COGS $1,742.44															

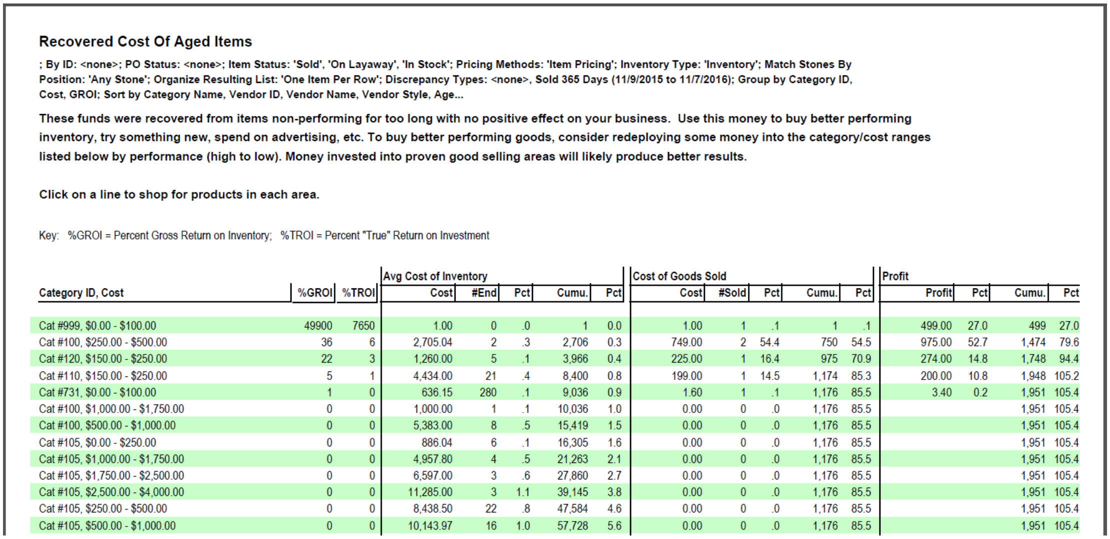
Data fields in the **Replenish Current Inventory** report include:

Cost Range	The cost range to which the data is categorized.
% Total	What percentage of total sales this category or vendor and price point accounts for. It is calculated based on the selling price.
# Sold	The total number of items in that grouping sold.
ADTS	Average days to sell. Of the items sold in this line, the number of days, on average, it took for them to sell.
ARS	Average retail sale for each item included in the number sold.
ANOH	Average number on hand during that time period.
#End	Number of items remaining on hand.
ADOH	Average days in stock. Average number of days that unsold items are in inventory.
Retail	The total retail value.
COGS	Cost of goods sold.
% Mgn	The profit margin based on the items that sold.
%Mkdn	The discount that was taken at point of sale marked down from retail.
ACOI	The average cost of inventory. In this case, it is the average cost of each item included in the number sold.

GROI	The gross return on investment for that grouping. If the value is above 150%, it will appear highlighted in green.
TROI	The true return on investment for that grouping. This figure takes into account the full amount of time the item was in stock during the reporting period.
Turn	Number of times that inventory investment turned at cost of goods sold.

7.4.12 Recovered Cost of Aged Items Report

The **Recovered Cost of Aged Items** report helps you plan the reinvestment of dollars recovered from the sales of aged items. When you put aged items on spiff or sale, you'll move inventory that has been sitting around for a long time. This is almost like found money that you can now think about investing in good performing categories. It shows a more detailed view of recovered funds than that shown in the **Recovered Funds Redeployment Guide**.



Recovered Cost Of Aged Items

; By ID: <none>; PO Status: <none>; Item Status: 'Sold', 'On Layaway', 'In Stock'; Pricing Methods: 'Item Pricing'; Inventory Type: 'Inventory'; Match Stones By Position: 'Any Stone'; Organize Resulting List: 'One Item Per Row'; Discrepancy Types: <none>, Sold 365 Days (11/9/2015 to 11/7/2016); Group by Category ID, Cost, GROI; Sort by Category Name, Vendor ID, Vendor Name, Vendor Style, Age...

These funds were recovered from items non-performing for too long with no positive effect on your business. Use this money to buy better performing inventory, try something new, spend on advertising, etc. To buy better performing goods, consider redeploying some money into the category/cost ranges listed below by performance (high to low). Money invested into proven good selling areas will likely produce better results.

Click on a line to shop for products in each area.

Key: %GROI = Percent Gross Return on Inventory; %TROI = Percent "True" Return on Investment

			Avg Cost of Inventory					Cost of Goods Sold					Profit			
Category ID, Cost	%GROI	%TROI	Cost	#End	Pct	Cumu.	Pct	Cost	#Sold	Pct	Cumu.	Pct	Profit	Pct	Cumu.	Pct
Cat #999, $0.00 - $100.00	49900	7650	1.00	0	.0	1	0.0	1.00	1	.1	1	.1	499.00	27.0	499	27.0
Cat #100, $250.00 - $500.00	36	6	2,705.04	2	.3	2,706	0.3	749.00	2	54.4	750	54.5	975.00	52.7	1,474	79.6
Cat #120, $150.00 - $250.00	22	3	1,260.00	5	.1	3,966	0.4	225.00	1	16.4	975	70.9	274.00	14.8	1,748	94.4
Cat #110, $150.00 - $250.00	5	1	4,434.00	21	.4	8,400	0.8	199.00	1	14.5	1,174	85.3	200.00	10.8	1,948	105.2
Cat #731, $0.00 - $100.00	1	0	636.15	280	.1	9,036	0.9	1.60	1	.1	1,176	85.5	3.40	0.2	1,951	105.4
Cat #100, $1,000.00 - $1,750.00	0	0	1,000.00	1	.1	10,036	1.0	0.00	0	.0	1,176	85.5			1,951	105.4
Cat #100, $500.00 - $1,000.00	0	0	5,383.00	8	.5	15,419	1.5	0.00	0	.0	1,176	85.5			1,951	105.4
Cat #105, $0.00 - $250.00	0	0	886.04	6	.1	16,305	1.6	0.00	0	.0	1,176	85.5			1,951	105.4
Cat #105, $1,000.00 - $1,750.00	0	0	4,957.80	4	.5	21,263	2.1	0.00	0	.0	1,176	85.5			1,951	105.4
Cat #105, $1,750.00 - $2,500.00	0	0	6,597.00	3	.6	27,860	2.7	0.00	0	.0	1,176	85.5			1,951	105.4
Cat #105, $2,500.00 - $4,000.00	0	0	11,285.00	3	1.1	39,145	3.8	0.00	0	.0	1,176	85.5			1,951	105.4
Cat #105, $250.00 - $500.00	0	0	8,438.50	22	.8	47,584	4.6	0.00	0	.0	1,176	85.5			1,951	105.4
Cat #105, $500.00 - $1,000.00	0	0	10,143.97	16	1.0	57,728	5.6	0.00	0	.0	1,176	85.5			1,951	105.4

Data fields in the **Recovered Cost of Aged Items** report include:

Category ID, Cost	The category ID and cost range for items listed.
% GROI	Percentage gross return on investment for the category and price range.
% TRIO	Percentage true return on investment for the category and price range.
Avg Cost of Inventory	
Cost	Average cost per item in that group.
# End	Number of items still in stock at the end of the date range in that group.
Pct	The percentage of cost of goods in stock that can be attributed to that group.
Cumu	Running down the report results in that column, this is a cumulative total of the cost of in-stock inventory for groups included in the report.
Pct	Running down the report results in that a column, this is the cumulative percentage of the cost of in-stock inventory for groups included in the report.

Cost of Goods Sold

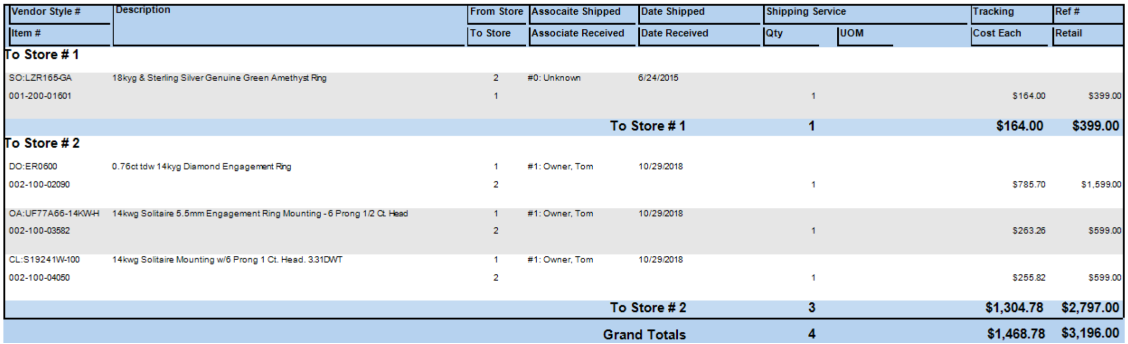
Cost	Total cost of goods sold in that group.
# Sold	Total quantity sold in that group.
Pct	The percentage of cost of goods sold that can be attributed to that group.
Cumu	Running down the report results in that column, this is a cumulative total of the cost of sold inventory for groups included in the report.
Pct	Running down the report results in that a column, this is the cumulative percentage of the cost of sold inventory for groups included in the report.

Profits

Profit	Profit made for the group.
Pct	The percentage of overall profit that can be attributed to those sales.
Cumu	Running down the report results in that column, this is a cumulative total of the profit from sales of inventory for groups included in the report.
Pct	Running down the report results in that a column, this is the cumulative percentage of the profit from sales of inventory for groups included in the report.

7.4.13 Transfer Report

The **Transfer Report** provides a detailed history of store-to-store transfers. Note that if the same item is transferred a number of times, the amounts shown may be inaccurate. For more about report filters and settings, see the section entitled Creating a Report and the high-level section entitled Inventory Reports.



Vendor Style #	Description	From Store	Assocaite Shipped	Date Shipped	Shipping Service		Tracking	Ref #
Item #		To Store	Associate Received	Date Received	Qty	UOM	Cost Each	Retail
To Store # 1								
SO:LZR165-GA	18kyg & Sterling Silver Genuine Green Amethyst Ring	2	#0: Unknown	6/24/2015				
001-200-01601		1			1		$164.00	$399.00
				To Store # 1	**1**		**$164.00**	**$399.00**
To Store # 2								
DO:ER0600	0.76ct tdw 14kyg Diamond Engagement Ring	1	#1: Owner, Tom	10/29/2018				
002-100-02090		2			1		$785.70	$1,599.00
OA:UF77A66-14KW-H	14kwg Solitaire 5.5mm Engagement Ring Mounting - 6 Prong 1/2 Ct Head	1	#1: Owner, Tom	10/29/2018				
002-100-03582		2			1		$263.26	$599.00
CL:S19241W-100	14kwg Solitaire Mounting w/6 Prong 1 Ct. Head. 3.31DWT	1	#1: Owner, Tom	10/29/2018				
002-100-04050		2			1		$255.82	$599.00
				To Store # 2	**3**		**$1,304.78**	**$2,797.00**
				Grand Totals	**4**		**$1,468.78**	**$3,196.00**

Data fields in the **Transfer** report include:

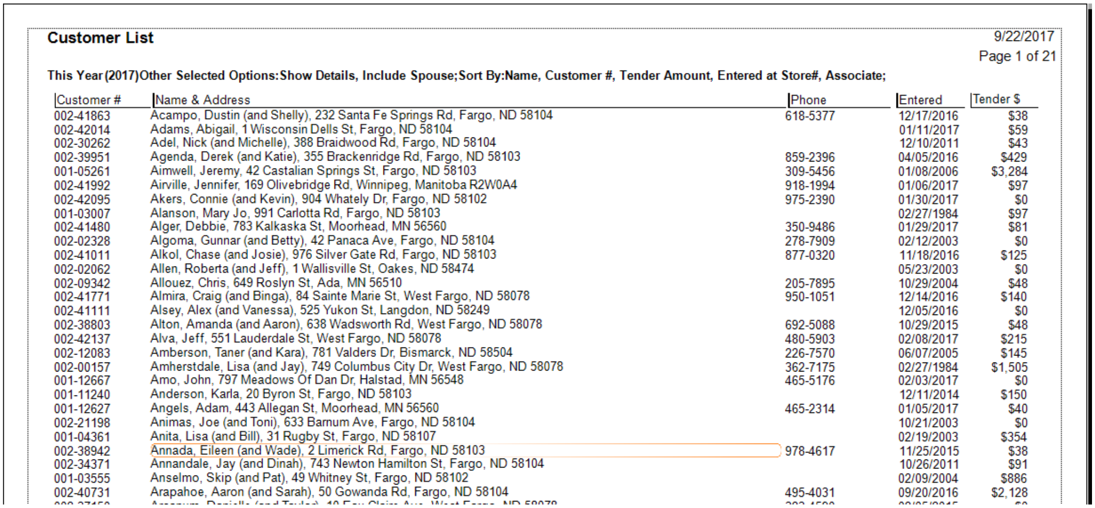
Vendor Style #	The vendor style number of the transferred item.
Item #	The item ID number of the transferred item.
Description	A description of the transferred item.
From Store	The store from which the item was transferred.
To Store	The store to which the item was transferred.
Associate Shipped	The associate who shipped the item.
Associate Received	The associate who received the item.
Date Shipped	The date the item was shipped from the transferring store.
Date Received	The date the item was received in the receiving store.
Shipping Service	The shipping service used.
QTY	The quantity of the transferred item.
UOM	The unit of measure of the transferred item (single item pricing, UPC/SKU, individual unit of measure, unit of measure, PRE).
Tracking	The shipping service's tracking number for the item.
Cost	The cost of the item at time of shipment.
Ref #	An optional reference number used for your own tracking purposes.
Retail	The retail value/price of the item at time of shipment.

7.5 Customer Reports

Customer reports are key to maintaining the intimate customer/jeweler bond. They allow you to keep track of upcoming special dates, wish lists, records, balances, and more. For more about report filters and settings, see the section entitled Creating a Report. For a video tutorial about working with customer filters, go to http://www.screencast.com/t/MkdH1e7iQmqR.

7.5.1 Simple List Report

The **Simple List** report is an alternative to printing the listed results in the **Find Customer** function. It returns basic customer information and also includes a total tender activity to date. In the report query, you can specify whether customers should be listed as couples or individuals. For more about report filters and settings, see the section entitled Creating a Report.



Customer List

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This Year (2017)Other Selected Options:Show Details, Include Spouse;Sort By:Name, Customer #, Tender Amount, Entered at Store#, Associate;

Customer #	Name & Address	Phone	Entered	Tender $
002-41863	Acampo, Dustin (and Shelly), 232 Santa Fe Springs Rd, Fargo, ND 58104	618-5377	12/17/2016	$38
002-42014	Adams, Abigail, 1 Wisconsin Dells St, Fargo, ND 58104		01/11/2017	$59
002-30262	Adel, Nick (and Michelle), 388 Braidwood Rd, Fargo, ND 58104		12/10/2011	$43
002-39951	Agenda, Derek (and Katie), 355 Brackenridge Rd, Fargo, ND 58103	859-2396	04/05/2016	$429
001-05261	Aimwell, Jeremy, 42 Castalian Springs St, Fargo, ND 58103	309-5456	01/08/2006	$3,284
002-41992	Airville, Jennifer, 169 Olivebridge Rd, Winnipeg, Manitoba R2W0A4	918-1994	01/06/2017	$97
002-42095	Akers, Connie (and Kevin), 904 Whately Dr, Fargo, ND 58102	975-2390	01/30/2017	$0
001-03007	Alanson, Mary Jo, 991 Carlotta Rd, Fargo, ND 58103		02/27/1984	$97
002-41480	Alger, Debbie, 783 Kalkaska St, Moorhead, MN 56560	350-9486	01/29/2017	$81
002-02328	Algoma, Gunnar (and Betty), 42 Panaca Ave, Fargo, ND 58104	278-7909	02/12/2003	$0
002-41011	Alkol, Chase (and Josie), 976 Silver Gate Rd, Fargo, ND 58103	877-0320	11/18/2016	$125
002-02062	Allen, Roberta (and Jeff), 1 Wallisville St, Oakes, ND 58474		05/23/2003	$0
002-09342	Allouez, Chris, 649 Roslyn St, Ada, MN 56510	205-7895	10/29/2004	$48
002-41771	Almira, Craig (and Binga), 84 Sainte Marie St, West Fargo, ND 58078	950-1051	12/14/2016	$140
002-41111	Alsey, Alex (and Vanessa), 525 Yukon St, Langdon, ND 58249		12/05/2016	$0
002-38803	Alton, Amanda (and Aaron), 638 Wadsworth Rd, West Fargo, ND 58078	692-5088	10/29/2015	$48
002-42137	Alva, Jeff, 551 Lauderdale St, West Fargo, ND 58078	480-5903	02/08/2017	$215
002-12083	Amberson, Taner (and Kara), 781 Valders Dr, Bismarck, ND 58504	226-7570	06/07/2005	$145
002-00157	Amherstdale, Lisa (and Jay), 749 Columbus City Dr, West Fargo, ND 58078	362-7175	02/27/1984	$1,505
001-12667	Amo, John, 797 Meadows Of Dan Dr, Halstad, MN 56548	465-5176	02/03/2017	$0
001-11240	Anderson, Karla, 20 Byron St, Fargo, ND 58103		12/11/2014	$150
001-12627	Angels, Adam, 443 Allegan St, Moorhead, MN 56560	465-2314	01/05/2017	$40
002-21198	Animas, Joe (and Toni), 633 Barnum Ave, Fargo, ND 58104		10/21/2003	$0
001-04361	Anita, Lisa (and Bill), 31 Rugby St, Fargo, ND 58107		02/19/2003	$354
002-38942	Annada, Eileen (and Wade), 2 Limerick Rd, Fargo, ND 58103	978-4617	11/25/2015	$38
002-34371	Annandale, Jay (and Dinah), 743 Newton Hamilton St, Fargo, ND 58104		10/26/2011	$91
001-03555	Anselmo, Skip (and Pat), 49 Whitney St, Fargo, ND 58102		02/09/2004	$886
002-40731	Arapahoe, Aaron (and Sarah), 50 Gowanda Rd, Fargo, ND 58104	495-4031	09/20/2016	$2,128

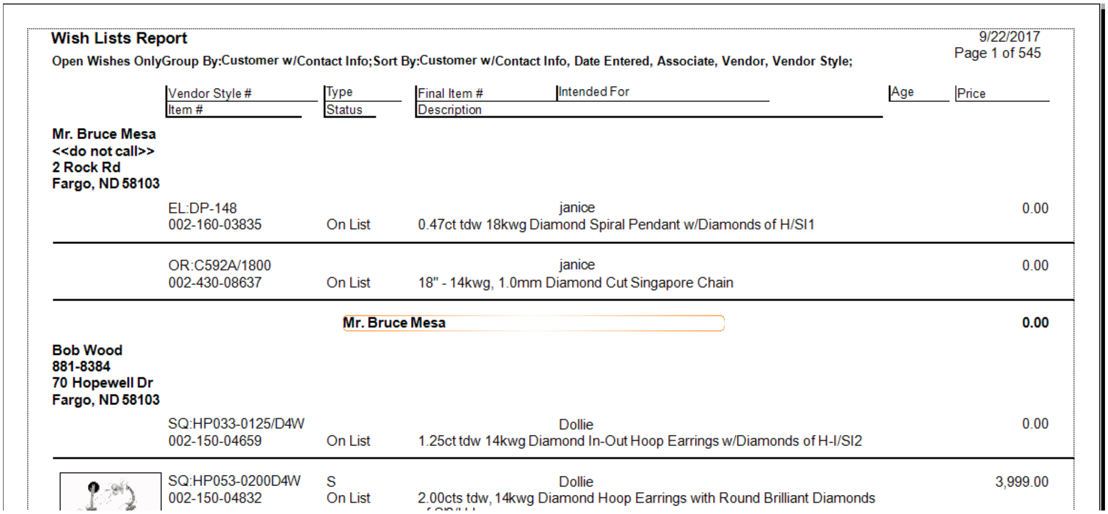
Data fields in the **Simple List** report include:

Customer #	The customer’s ID number.
Customer Name and Address	The customer’s contact information.
Phone	The customer’s phone number.
Entered	The date of the customer’s first activity.
Tender$	The amount the customer has spent with the specified store in the specified time frame.

There is the option to include the spouse’s name.

7.5.2 Wish Lists Report

The **Wish List** report gives your customers the opportunity to record items they would like to receive as a gift. For more information on this feature, see the section entitled Wish List. The **Wish List** report requires only that you select a time frame. For more about report filters and settings, see the section entitled Creating a Report.



Wish Lists Report
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Open Wishes OnlyGroup By:Customer w/Contact Info;Sort By:Customer w/Contact Info, Date Entered, Associate, Vendor, Vendor Style;

Vendor Style # / Item # | Type / Status | Final Item # / Description | Intended For | Age | Price

Mr. Bruce Mesa
<<do not call>>
2 Rock Rd
Fargo, ND 58103

EL:DP-148 | janice | 0.00
002-160-03835 | On List | 0.47ct tdw 18kwg Diamond Spiral Pendant w/Diamonds of H/SI1

OR:C592A/1800 | janice | 0.00
002-430-08637 | On List | 18" - 14kwg, 1.0mm Diamond Cut Singapore Chain

Mr. Bruce Mesa **0.00**

Bob Wood
881-8384
70 Hopewell Dr
Fargo, ND 58103

SQ:HP033-0125/D4W | Dollie | 0.00
002-150-04659 | On List | 1.25ct tdw 14kwg Diamond In-Out Hoop Earrings w/Diamonds of H-I/SI2

SQ:HP053-0200D4W | S | Dollie | 3,999.00
002-150-04832 | On List | 2.00cts tdw, 14kwg Diamond Hoop Earrings with Round Brilliant Diamonds

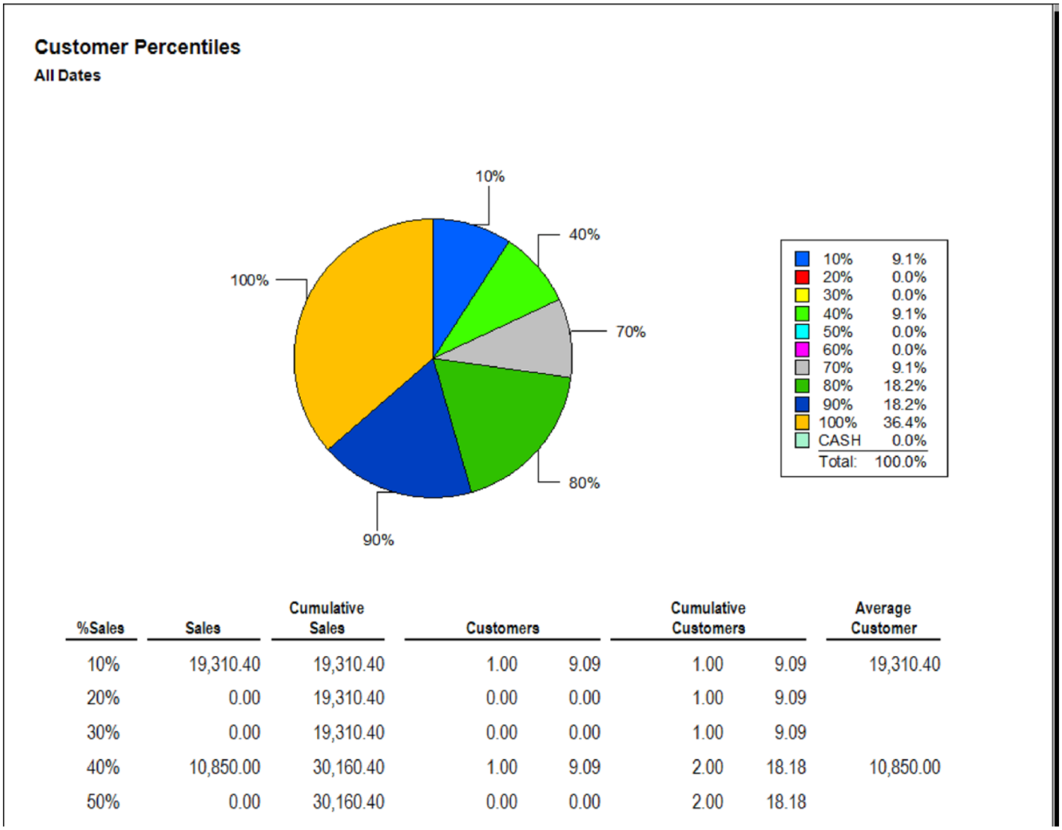
Data fields in the **Customer Wish List** report include:

Customer name, address, and phone number	The customer's name and contact info.
Vendor Style #	The style number of the item for which the customer wished.
Item #	Item ID of the desired item.
Type	Item type.
Status	Wish list status.
Intended For	The person for whom the item is intended.
Description	The item description.
Age	The length of time, in days, that the wish has been in the system.
Price	The price the item sold for.

7.5.3 Percentiles Report

It can be useful to know for marketing purposes what portion of your customers make up the largest portion of sales. For example, it is not unusual for 10 percent of your customers to generate 80 percent of your sales. The **Percentiles** report provides a percentage of sales as attributed to a specific section of your customer base. It requires only that you select a time frame.

Results



Customer Percentiles

All Dates

🟦	10%	9.1%
🟥	20%	0.0%
🟨	30%	0.0%
🟩	40%	9.1%
☐	50%	0.0%
☐	60%	0.0%
☐	70%	9.1%
🟩	80%	18.2%
🟦	90%	18.2%
🟧	100%	36.4%
☐	CASH	0.0%
	Total:	100.0%

%Sales	Sales	Cumulative Sales	Customers		Cumulative Customers		Average Customer
10%	19,310.40	19,310.40	1.00	9.09	1.00	9.09	19,310.40
20%	0.00	19,310.40	0.00	0.00	1.00	9.09	
30%	0.00	19,310.40	0.00	0.00	1.00	9.09	
40%	10,850.00	30,160.40	1.00	9.09	2.00	18.18	10,850.00
50%	0.00	30,160.40	0.00	0.00	2.00	18.18	

Data fields in the **Percentiles** report include:

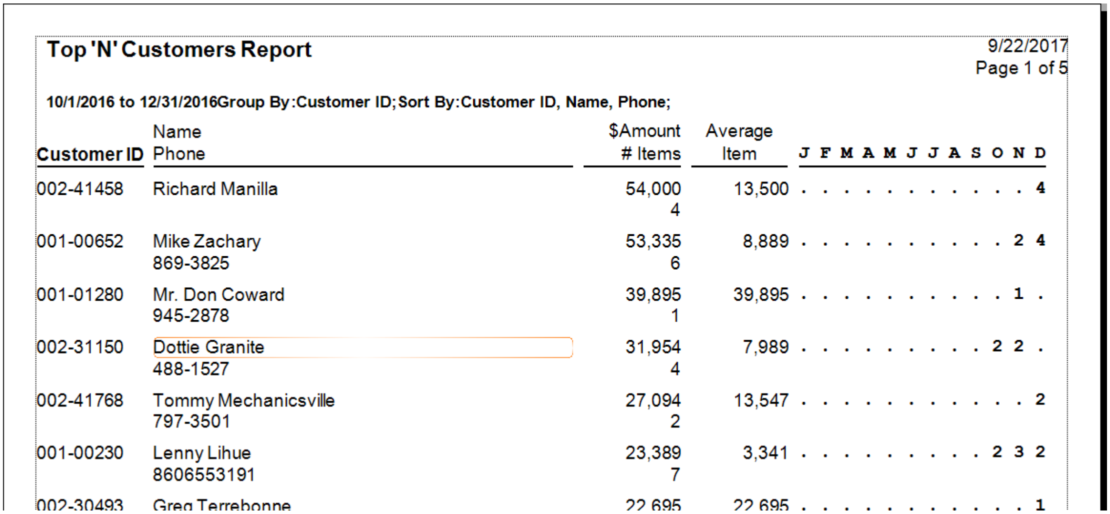
Pie Chart	Depicts the percentiles graphically.
% Sales	Percentage of sales in 10 percent increments.
Sales	The total sales in that percentile increment.

Cumulative Sales	A running total of sales including sales from the previous percentile category.
	Clicking on a figure in the Cumulative Sales column of the Percentiles report will return the list of customers who made purchases toward it.
Customers	Number of customers in that percentile.
Cumulative Customers	A running total of customers including customers from the previous percentile category.
Average Customer	In that percentile, what the average customer spent.

7.5.4 Top “n” Customers Report

The **Top “n” Customers** report lists the highest-spending customers. It asks you to provide the value of “n,” which indicates the number of top customers to include based on either amount tendered or merchandise totals. There is an option to exclude open layaways. Beyond that, it requires only that you select a time frame.

You can use the **Category** or **Vendor** filters to see your top customers for a particular category or vendor.



Top 'N' Customers Report

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10/1/2016 to 12/31/2016Group By:Customer ID;Sort By:Customer ID, Name, Phone;

Customer ID	Name Phone	$Amount # Items	Average Item	J	F	M	A	M	J	J	A	S	O	N	D
002-41458	Richard Manilla	54,000 4	13,500	.	.	.	.	.	.	.	.	.	.	.	4
001-00652	Mike Zachary 869-3825	53,335 6	8,889	.	.	.	.	.	.	.	.	.	.	2	4
001-01280	Mr. Don Coward 945-2878	39,895 1	39,895	.	.	.	.	.	.	.	.	.	.	1	.
002-31150	Dottie Granite 488-1527	31,954 4	7,989	.	.	.	.	.	.	.	.	.	2	2	.
002-41768	Tommy Mechanicsville 797-3501	27,094 2	13,547	.	.	.	.	.	.	.	.	.	.	.	2
001-00230	Lenny Lihue 8606553191	23,389 7	3,341	.	.	.	.	.	.	.	.	.	2	3	2
002-30493	Greg Terrebonne	22,695	22,695	.	.	.	.	.	.	.	.	.	.	.	1

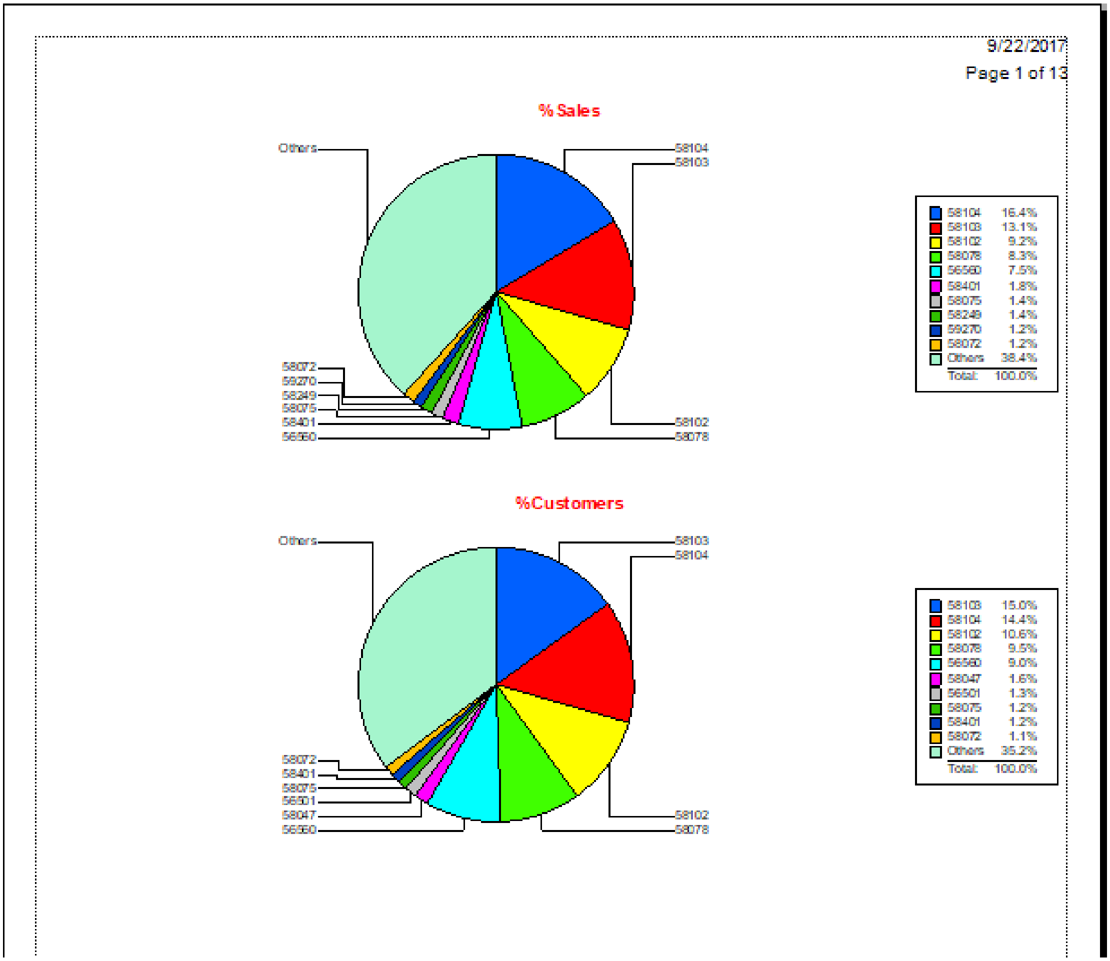
Data fields in the **Top “n” Customers** report include:

Customer ID	The customer’s ID number.
Name/Phone	Customer’s name and telephone number.
$ Amount/Number of Items	The amount of the sale(s) and how many items were purchased.
Average Item	The average price of the items purchased by this customer.
Month in which sale occurred	The months in which sales were made and how many.

The Top N Customers report is very useful in determining your top customers for purposes of marketing. While not directly exportable, this report can be used in conjunction with the customer export function. This is accomplished by taking the amount spent by the last person to make the cut (e.g. the amount spent by customer 500 in a top 500 report) and plugging it into the Amount Spent field on a customer export or mailing.

7.5.5 By ZIP Report

The **By ZIP** report shows the percent of customers in a period of time by ZIP Code and the percent of expenditures in a period of time by ZIP Code. For more about report filters and settings, see the section entitled Creating a Report.



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% Sales

🟦	58104	16.4%
🟥	58103	13.1%
🟨	58102	9.2%
🟩	58078	8.3%
🟦	56560	7.5%
🟪	58401	1.8%
⬜	58075	1.4%
🟩	58249	1.4%
🟦	59270	1.2%
🟧	58072	1.2%
🟩	Others	38.4%
	Total:	100.0%

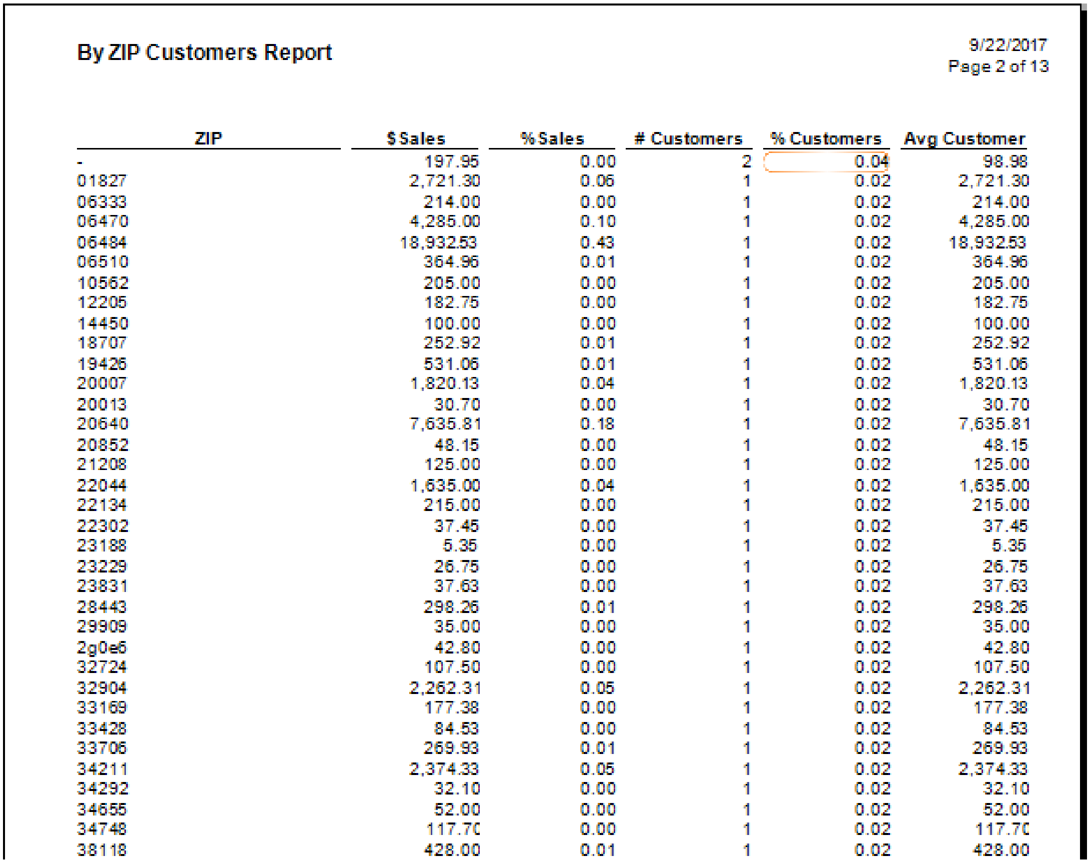
%Customers

🟦	58103	15.0%
🟥	58104	14.4%
🟨	58102	10.6%
🟩	58078	9.5%
🟦	56560	9.0%
🟪	58047	1.6%
⬜	56501	1.3%
🟩	58075	1.2%
🟦	58401	1.2%
🟧	58072	1.1%
🟩	Others	35.2%
	Total:	100.0%

Pie Chart Data

% Sales	Percent of sales by zip code.

% Customers	Percent of customers by zip code.



By ZIP Customers Report

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ZIP	$ Sales	% Sales	# Customers	% Customers	Avg Customer
-	197.95	0.00	2	0.04	98.98
01827	2,721.30	0.06	1	0.02	2,721.30
06333	214.00	0.00	1	0.02	214.00
06470	4,285.00	0.10	1	0.02	4,285.00
06484	18,932.53	0.43	1	0.02	18,932.53
06510	364.96	0.01	1	0.02	364.96
10562	205.00	0.00	1	0.02	205.00
12205	182.75	0.00	1	0.02	182.75
14450	100.00	0.00	1	0.02	100.00
18707	252.92	0.01	1	0.02	252.92
19426	531.06	0.01	1	0.02	531.06
20007	1,820.13	0.04	1	0.02	1,820.13
20013	30.70	0.00	1	0.02	30.70
20640	7,635.81	0.18	1	0.02	7,635.81
20852	48.15	0.00	1	0.02	48.15
21208	125.00	0.00	1	0.02	125.00
22044	1,635.00	0.04	1	0.02	1,635.00
22134	215.00	0.00	1	0.02	215.00
22302	37.45	0.00	1	0.02	37.45
23188	5.35	0.00	1	0.02	5.35
23229	26.75	0.00	1	0.02	26.75
23831	37.63	0.00	1	0.02	37.63
28443	298.26	0.01	1	0.02	298.26
29909	35.00	0.00	1	0.02	35.00
2g0e6	42.80	0.00	1	0.02	42.80
32724	107.50	0.00	1	0.02	107.50
32904	2,262.31	0.05	1	0.02	2,262.31
33169	177.38	0.00	1	0.02	177.38
33428	84.53	0.00	1	0.02	84.53
33706	269.93	0.01	1	0.02	269.93
34211	2,374.33	0.05	1	0.02	2,374.33
34292	32.10	0.00	1	0.02	32.10
34655	52.00	0.00	1	0.02	52.00
34748	117.7C	0.00	1	0.02	117.7C
38118	428.00	0.01	1	0.02	428.00

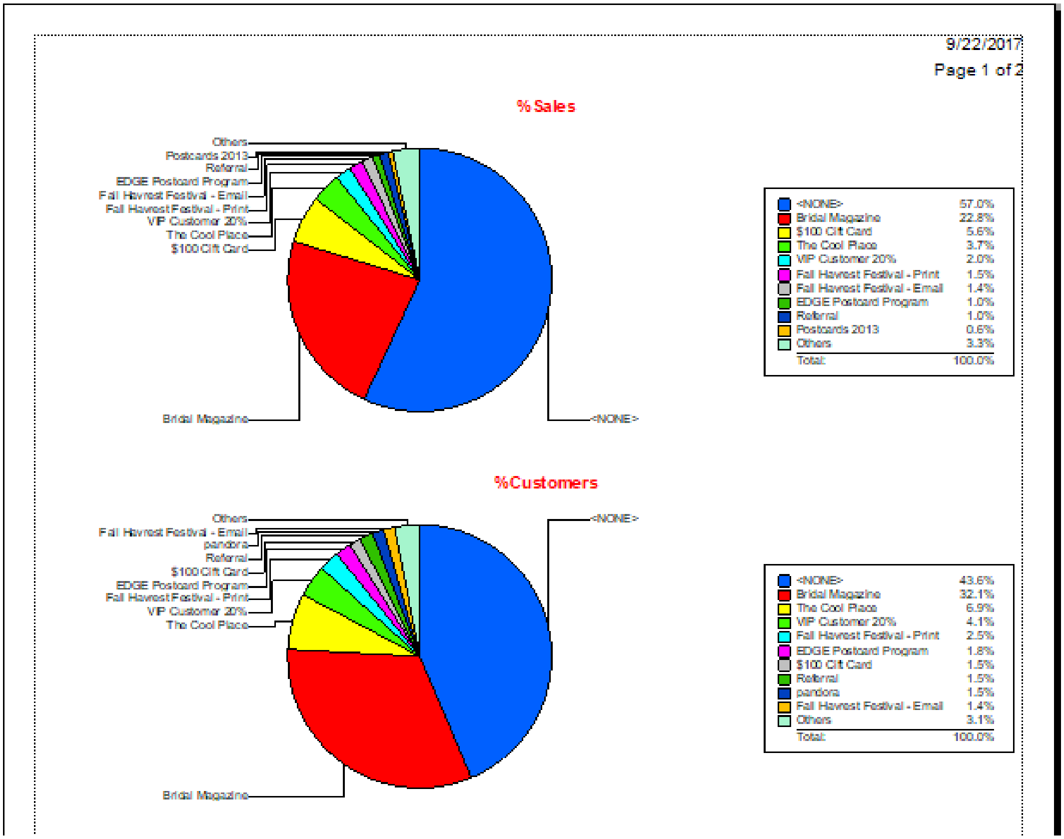
Data in the **By ZIP** report includes:

Zip	The zip codes that are included.
$ Sales	Dollar amount of sales generated by each zip code.
% Sales	The percentage of sales generated by each zip code.
# Customers	The number of customers in each zip code.
% Customers	The percentage of customers in each zip code.
Avg Customer	Amount spent on average by each customer in that zip code.

In the By ZIP report, for records where the customer has no preferred address, they will appear as None. On the pie chart, the top 10 zip codes are displayed, and Other contains totals for all others.

7.5.6 By Acquisition Report

The **By Acquisition** report shows sales according to how the customer came to be a customer as indicated by the **Why In** field on the **Point of Sale** window. It requires only that you select a time frame.

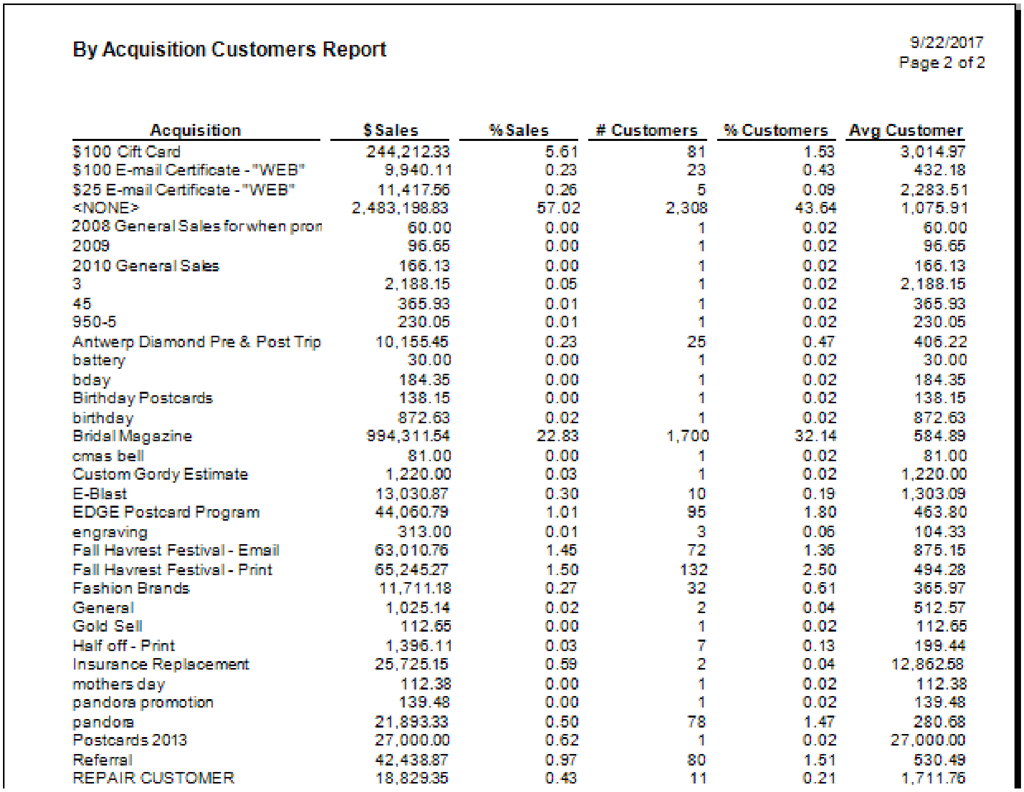


🟦	<NONE>	57.0%
🟥	Bridal Magazine	22.8%
🟨	$100 Gift Card	5.6%
🟩	The Cool Place	3.7%
■	VIP Customer 20%	2.0%
🟪	Fall Harvest Festival - Print	1.5%
⬜	Fall Harvest Festival - Email	1.4%
🟩	EDGE Postcard Program	1.0%
🟦	Referral	1.0%
🟧	Postcards 2013	0.6%
■	Others	3.3%
	Total:	100.0%

🟦	<NONE>	43.6%
🟥	Bridal Magazine	32.1%
🟨	The Cool Place	6.9%
🟩	VIP Customer 20%	4.1%
■	Fall Harvest Festival - Print	2.5%
🟪	EDGE Postcard Program	1.8%
⬜	$100 Gift Card	1.5%
🟩	Referral	1.5%
🟦	pandora	1.5%
🟧	Fall Harvest Festival - Email	1.4%
■	Others	3.1%
	Total:	100.0%

Pie Chart Data

% Sales	Percent of sales by type of acquisition.
% Customers	Percent of customers by type of acquisition.



By Acquisition Customers Report

9/22/2017
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Acquisition	$ Sales	% Sales	# Customers	% Customers	Avg Customer
$100 Gift Card	244,212.33	5.61	81	1.53	3,014.97
$100 E-mail Certificate - "WEB"	9,940.11	0.23	23	0.43	432.18
$25 E-mail Certificate - "WEB"	11,417.56	0.26	5	0.09	2,283.51
<NONE>	2,483,198.83	57.02	2,308	43.64	1,075.91
2008 General Sales for when pron	60.00	0.00	1	0.02	60.00
2009	96.65	0.00	1	0.02	96.65
2010 General Sales	166.13	0.00	1	0.02	166.13
3	2,188.15	0.05	1	0.02	2,188.15
45	365.93	0.01	1	0.02	365.93
950-5	230.05	0.01	1	0.02	230.05
Antwerp Diamond Pre & Post Trip	10,155.45	0.23	25	0.47	406.22
battery	30.00	0.00	1	0.02	30.00
bday	184.35	0.00	1	0.02	184.35
Birthday Postcards	138.15	0.00	1	0.02	138.15
birthday	872.63	0.02	1	0.02	872.63
Bridal Magazine	994,311.54	22.83	1,700	32.14	584.89
cmas bell	81.00	0.00	1	0.02	81.00
Custom Gordy Estimate	1,220.00	0.03	1	0.02	1,220.00
E-Blast	13,030.87	0.30	10	0.19	1,303.09
EDGE Postcard Program	44,060.79	1.01	95	1.80	463.80
engraving	313.00	0.01	3	0.06	104.33
Fall Havrest Festival - Email	63,010.76	1.45	72	1.36	875.15
Fall Havrest Festival - Print	65,245.27	1.50	132	2.50	494.28
Fashion Brands	11,711.18	0.27	32	0.61	365.97
General	1,025.14	0.02	2	0.04	512.57
Gold Sell	112.65	0.00	1	0.02	112.65
Half off - Print	1,396.11	0.03	7	0.13	199.44
Insurance Replacement	25,725.15	0.59	2	0.04	12,862.58
mothers day	112.38	0.00	1	0.02	112.38
pandora promotion	139.48	0.00	1	0.02	139.48
pandora	21,893.33	0.50	78	1.47	280.68
Postcards 2013	27,000.00	0.62	1	0.02	27,000.00
Referral	42,438.87	0.97	80	1.51	530.49
REPAIR CUSTOMER	18,829.35	0.43	11	0.21	1,711.76

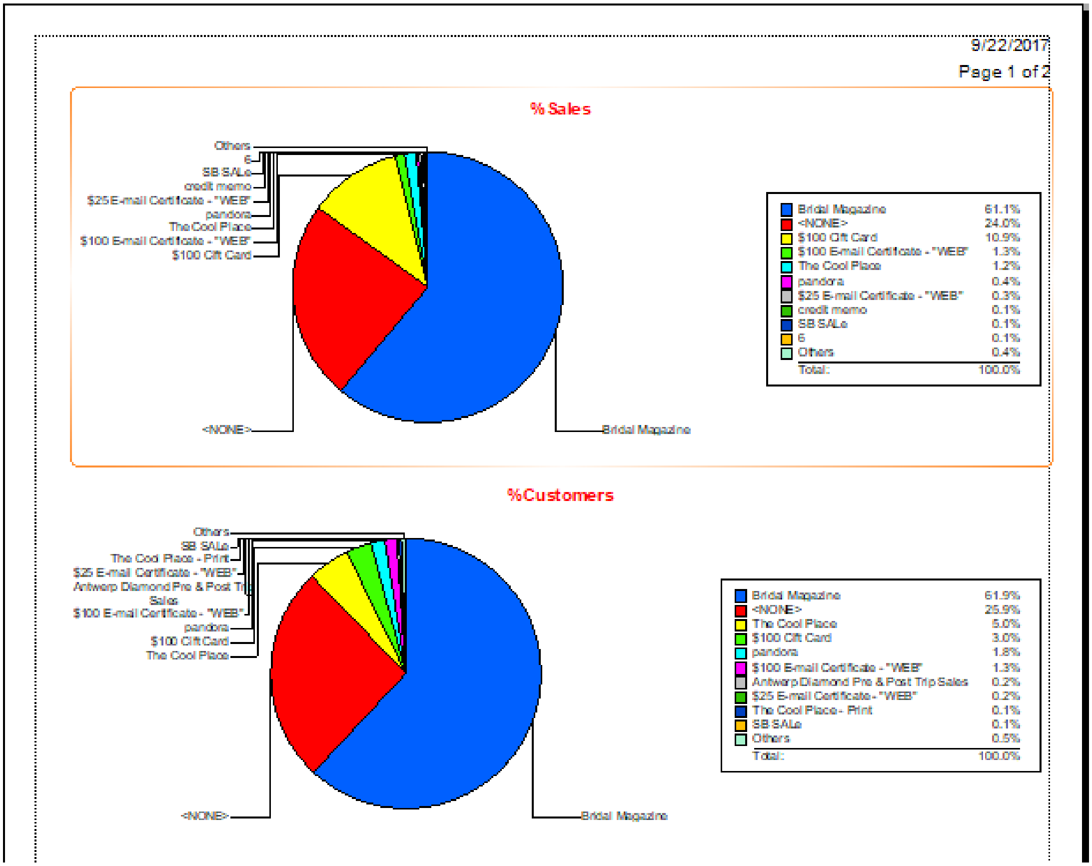
Data fields in the **By Acquisition** report include:

Acquisition	The type of acquisition.
$ Sales	Dollar amount of sales generated by type of acquisition.
% Sales	The percentage of sales generated by type of acquisition.
# Customers	The number of customers in each type of acquisition.
% Customers	The percentage of customers in each type of acquisition.
Avg Customer	Amount spent on average by each customer in that type of acquisition.

In the By Acquisition report, for records where no acquisition type was recorded, they will appear as None. On the pie chart, the top 10 acquisition types are displayed, and Other contains totals for all the others.

7.5.7 By Why In Report

If you track the occasion that brought a customer into your store, the **By Why In** report can help track such activity and help plan promotions, postcards, and other targeted marketing. For more about report filters and settings, see the section entitled Creating a Report.

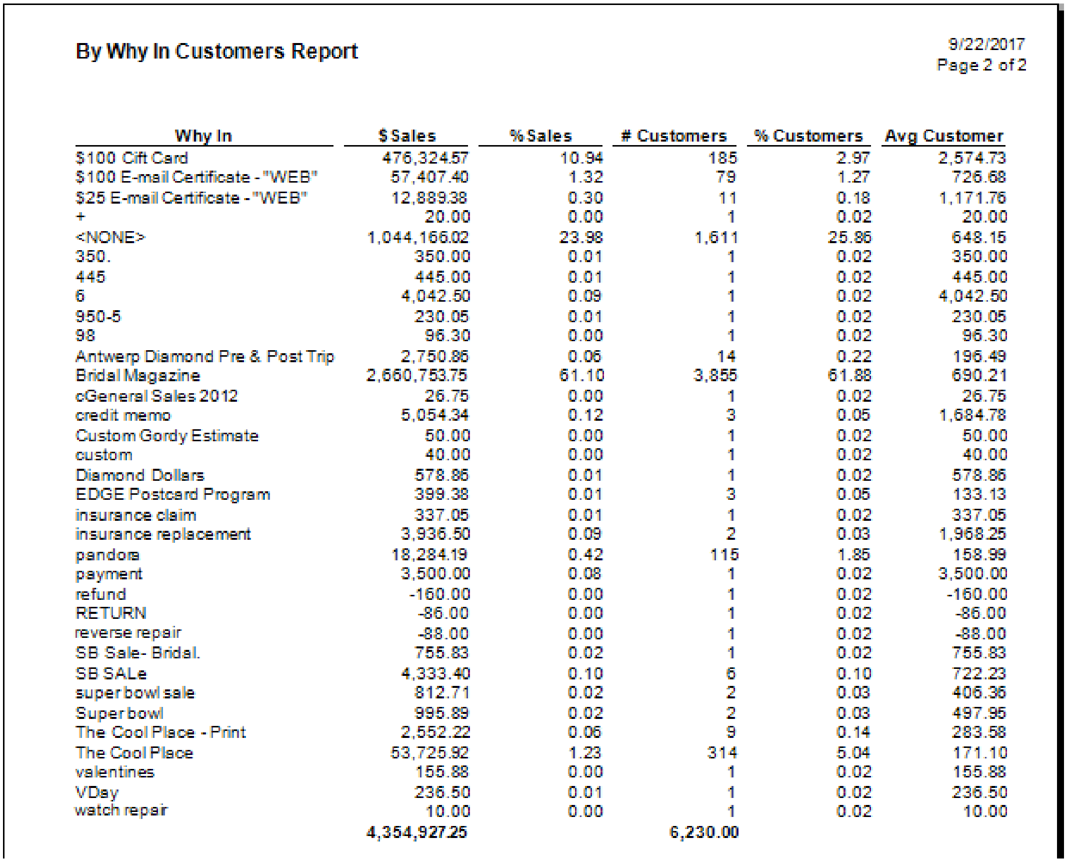


🟦	Bridal Magazine	61.1%
🟥	<NONE>	24.0%
🟨	$100 Gift Card	10.9%
🟩	$100 E-mail Certificate - "WEB"	1.3%
🟦	The Cool Place	1.2%
🟪	pandora	0.4%
⬜	$25 E-mail Certificate - "WEB"	0.3%
🟩	credit memo	0.1%
🟦	SB SALe	0.1%
🟧	6	0.1%
🟩	Others	0.4%
	Total:	100.0%

🟦	Bridal Magazine	61.9%
🟥	<NONE>	25.9%
🟨	The Cool Place	5.0%
🟩	$100 Gift Card	3.0%
🟦	pandora	1.8%
🟪	$100 E-mail Certificate - "WEB"	1.3%
⬜	Antwerp Diamond Pre & Post Trip Sales	0.2%
🟩	$25 E-mail Certificate - "WEB"	0.2%
🟦	The Cool Place - Print	0.1%
🟧	SB SALe	0.1%
🟩	Others	0.5%
	Total:	100.0%

Pie Chart Data

% Sales	Percent of sales by type of Why In?
% Customers	Percent of customers by type of Why In?



By Why In Customers Report

9/22/2017
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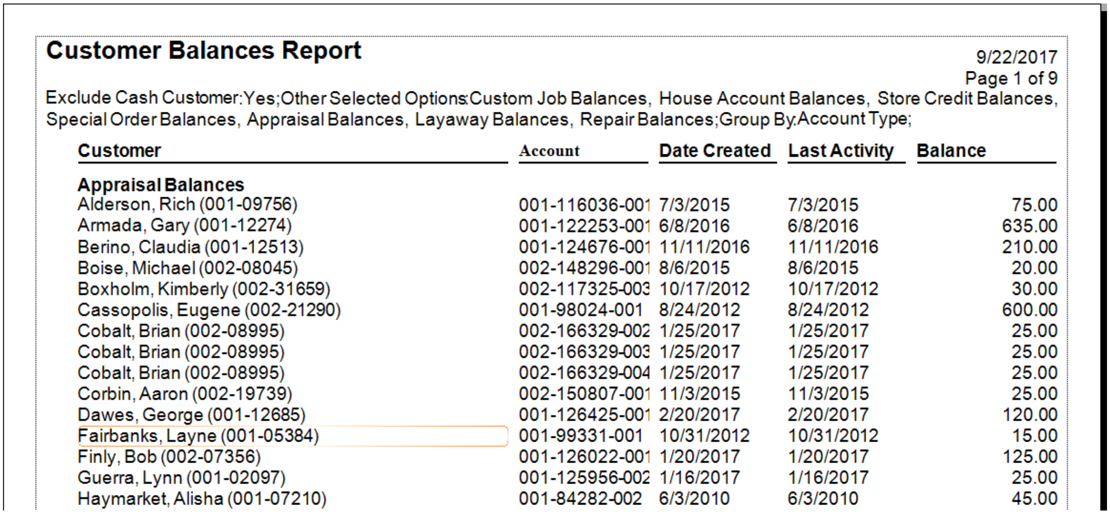
Why In	$ Sales	% Sales	# Customers	% Customers	Avg Customer
$100 Gift Card	476,324.57	10.94	185	2.97	2,574.73
$100 E-mail Certificate - "WEB"	57,407.40	1.32	79	1.27	726.68
$25 E-mail Certificate - "WEB"	12,889.38	0.30	11	0.18	1,171.76
+	20.00	0.00	1	0.02	20.00
<NONE>	1,044,166.02	23.98	1,611	25.86	648.15
350.	350.00	0.01	1	0.02	350.00
445	445.00	0.01	1	0.02	445.00
6	4,042.50	0.09	1	0.02	4,042.50
950-5	230.05	0.01	1	0.02	230.05
98	96.30	0.00	1	0.02	96.30
Antwerp Diamond Pre & Post Trip	2,750.86	0.06	14	0.22	196.49
Bridal Magazine	2,660,753.75	61.10	3,855	61.88	690.21
cGeneral Sales 2012	26.75	0.00	1	0.02	26.75
credit memo	5,054.34	0.12	3	0.05	1,684.78
Custom Gordy Estimate	50.00	0.00	1	0.02	50.00
custom	40.00	0.00	1	0.02	40.00
Diamond Dollars	578.86	0.01	1	0.02	578.86
EDGE Postcard Program	399.38	0.01	3	0.05	133.13
insurance claim	337.05	0.01	1	0.02	337.05
insurance replacement	3,936.50	0.09	2	0.03	1,968.25
pandora	18,284.19	0.42	115	1.85	158.99
payment	3,500.00	0.08	1	0.02	3,500.00
refund	-160.00	0.00	1	0.02	-160.00
RETURN	-86.00	0.00	1	0.02	-86.00
reverse repair	-88.00	0.00	1	0.02	-88.00
SB Sale- Bridal.	755.83	0.02	1	0.02	755.83
SB SALe	4,333.40	0.10	6	0.10	722.23
super bowl sale	812.71	0.02	2	0.03	406.36
Super bowl	995.89	0.02	2	0.03	497.95
The Cool Place - Print	2,552.22	0.06	9	0.14	283.58
The Cool Place	53,725.92	1.23	314	5.04	171.10
valentines	155.88	0.00	1	0.02	155.88
VDay	236.50	0.01	1	0.02	236.50
watch repair	10.00	0.00	1	0.02	10.00
	4,354,927.25		6,230.00		

Data fields in the **By Why In** report include:

Why In	Lists promotional events.
$ Sales	The amount of sales produced by each promotional event.
% Sales	The percent of sales produced by each promotional event.
# Customers	The number of customers who came in because of the promotional event.
% Customers	The percent of customers who came in because of the promotional event.
Avg Customer	On average, the amount customers spent as a result of their visit.

7.5.8 Balances Report

The **Balances** report summarizes customer balances, either credits owed to the customer or balances due to the store. This report is automatically grouped by account type. The filter allows you to select specific account/balance types. For convenience, you may include the customer's phone number or address to assist with follow-up.



Customer Balances Report

9/22/2017
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Exclude Cash Customer:Yes;Other Selected Options:Custom Job Balances, House Account Balances, Store Credit Balances, Special Order Balances, Appraisal Balances, Layaway Balances, Repair Balances;Group By:Account Type;

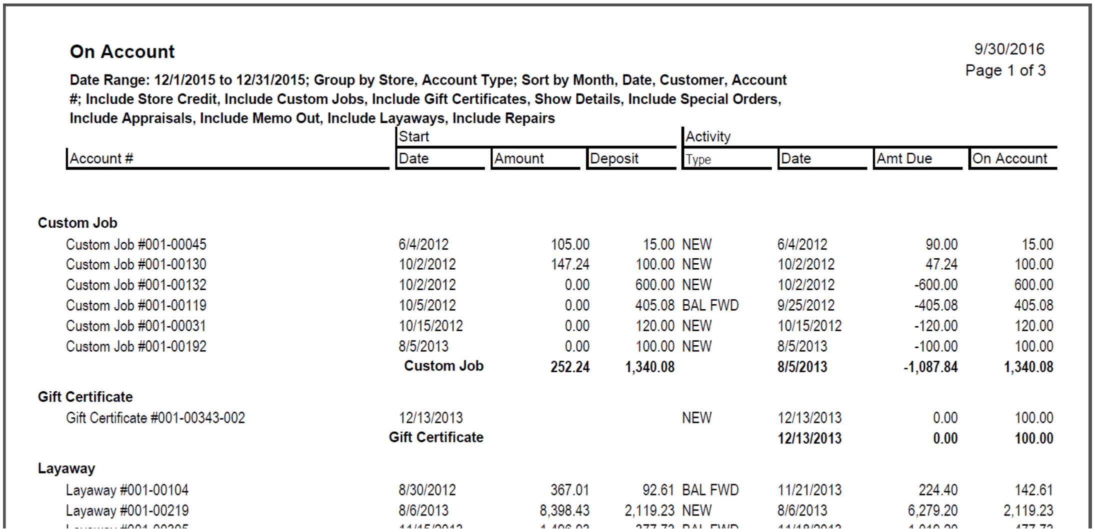
Customer	Account	Date Created	Last Activity	Balance
Appraisal Balances				
Alderson, Rich (001-09756)	001-116036-001	7/3/2015	7/3/2015	75.00
Armada, Gary (001-12274)	001-122253-001	6/8/2016	6/8/2016	635.00
Berino, Claudia (001-12513)	001-124676-001	11/11/2016	11/11/2016	210.00
Boise, Michael (002-08045)	002-148296-001	8/6/2015	8/6/2015	20.00
Boxholm, Kimberly (002-31659)	002-117325-003	10/17/2012	10/17/2012	30.00
Cassopolis, Eugene (002-21290)	001-98024-001	8/24/2012	8/24/2012	600.00
Cobalt, Brian (002-08995)	002-166329-002	1/25/2017	1/25/2017	25.00
Cobalt, Brian (002-08995)	002-166329-003	1/25/2017	1/25/2017	25.00
Cobalt, Brian (002-08995)	002-166329-004	1/25/2017	1/25/2017	25.00
Corbin, Aaron (002-19739)	002-150807-001	11/3/2015	11/3/2015	25.00
Dawes, George (001-12685)	001-126425-001	2/20/2017	2/20/2017	120.00
Fairbanks, Layne (001-05384)	001-99331-001	10/31/2012	10/31/2012	15.00
Finly, Bob (002-07356)	001-126022-001	1/20/2017	1/20/2017	125.00
Guerra, Lynn (001-02097)	001-125956-002	1/16/2017	1/16/2017	25.00
Haymarket, Alisha (001-07210)	001-84282-002	6/3/2010	6/3/2010	45.00

Data fields in the **Balances** report include:

Customer	The customer's name.
Account	The type of account or account number, depending on the account type.
Date Created	The date the account was created.
Last Activity	The date of the last transaction.
Balance	The current balance on the account.

7.5.9 On Account Report

The **On Account** report lists all customer deposits on account including open transactions such as layaways, special orders, repairs, etc. This report is used specifically to account for customer deposits liability. For this report, despite the date selection, this report query is modified to include balances forward from previous dates and activity for the specified date range. The end date of the report will determine the cutoff point for the on account balances. For example, if you wish to see detail for on account transactions for last month and by account type, run the report as follows: Set the activity date to last month, check **Account Type** in the **Group By** field, and check all appropriate account types from the option that you want to report on. The report returns balances for all accounts that have a balance as of the selected end date, regardless of start date. Detail for transactions will be included for only the selected date range.



On Account

9/30/2016
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Date Range: 12/1/2015 to 12/31/2015; Group by Store, Account Type; Sort by Month, Date, Customer, Account #; Include Store Credit, Include Custom Jobs, Include Gift Certificates, Show Details, Include Special Orders, Include Appraisals, Include Memo Out, Include Layaways, Include Repairs

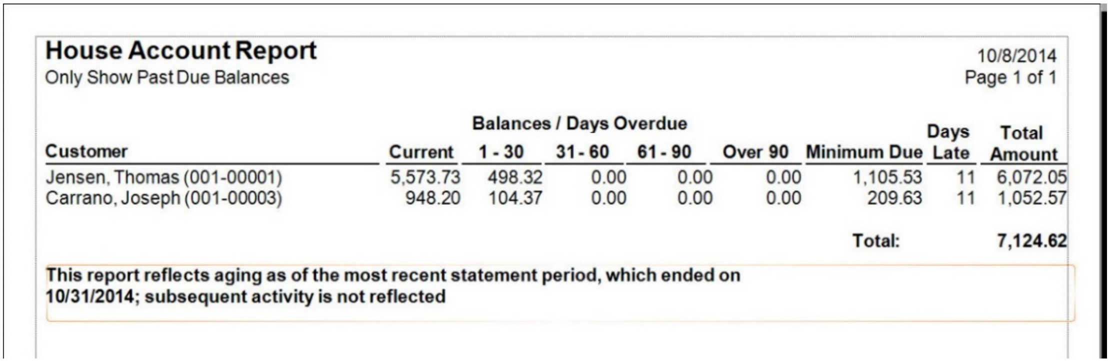
	Start			Activity			
Account #	Date	Amount	Deposit	Type	Date	Amt Due	On Account
Custom Job							
Custom Job #001-00045	6/4/2012	105.00	15.00	NEW	6/4/2012	90.00	15.00
Custom Job #001-00130	10/2/2012	147.24	100.00	NEW	10/2/2012	47.24	100.00
Custom Job #001-00132	10/2/2012	0.00	600.00	NEW	10/2/2012	-600.00	600.00
Custom Job #001-00119	10/5/2012	0.00	405.08	BAL FWD	9/25/2012	-405.08	405.08
Custom Job #001-00031	10/15/2012	0.00	120.00	NEW	10/15/2012	-120.00	120.00
Custom Job #001-00192	8/5/2013	0.00	100.00	NEW	8/5/2013	-100.00	100.00
	Custom Job	**252.24**	**1,340.08**		**8/5/2013**	**-1,087.84**	**1,340.08**
Gift Certificate							
Gift Certificate #001-00343-002	12/13/2013			NEW	12/13/2013	0.00	100.00
	Gift Certificate				**12/13/2013**	**0.00**	**100.00**
Layaway							
Layaway #001-00104	8/30/2012	367.01	92.61	BAL FWD	11/21/2013	224.40	142.61
Layaway #001-00219	8/6/2013	8,398.43	2,119.23	NEW	8/6/2013	6,279.20	2,119.23

Data fields in the **On Account** report include:

Account #	The ID for the transaction listed in the account.
Start Date	The date this transaction was started.
Start Amount	Total amount of transaction.
Start Deposit	Initial deposit given on inception.
Activity Type	The type of activity.
Activity Date	The date of last activity.
Activity Amt Due	The amount still due on this transaction.
Activity On Account	The total amount held on account towards this transaction.

7.5.10 House Account Aging Report

The **House Account Aging** report shows account aging as of the most recent statement period.



House Account Report
Only Show Past Due Balances

10/8/2014
Page 1 of 1

Customer	Current	Balances / Days Overdue 1 - 30	31 - 60	61 - 90	Over 90	Minimum Due	Days Late	Total Amount
Jensen, Thomas (001-00001)	5,573.73	498.32	0.00	0.00	0.00	1,105.53	11	6,072.05
Carrano, Joseph (001-00003)	948.20	104.37	0.00	0.00	0.00	209.63	11	1,052.57
						Total:		7,124.62

This report reflects aging as of the most recent statement period, which ended on 10/31/2014; subsequent activity is not reflected

Data fields in the **House Account Aging** report include:

Customer	The customer's name.
Current	The amount due for current statement period.
1-30	The amount that is unpaid for between 1 and 30 days since the last closing.
31-60	The amount that is unpaid for between 31 and 60 days since the last closing.
61-90	The amount that is unpaid for between 61 and 90 days since the last closing.
Over 90	The amount that is unpaid for over 90 days since the last closing.
Minimum Due	The minimum amount due on the account including all unpaid amounts.
Days Late	The number of days late/not paid the minimum amount due is.
Total Amount	The total balance.

7.5.11 Rewards Reports

Rewards reports help you determine the amounts being awarded and what your outstanding rewards and referrals are. For more about report filters and settings, see the section entitled Creating a Report.

7.5.11.1 Rewards Detail Report

The **Rewards Detail** report shows merchandise purchased affecting rewards and the amount rewarded.

Rewards Detail Report

5/30/2014

Group By: Customer ID; Sort By: Customer ID,Customer Name

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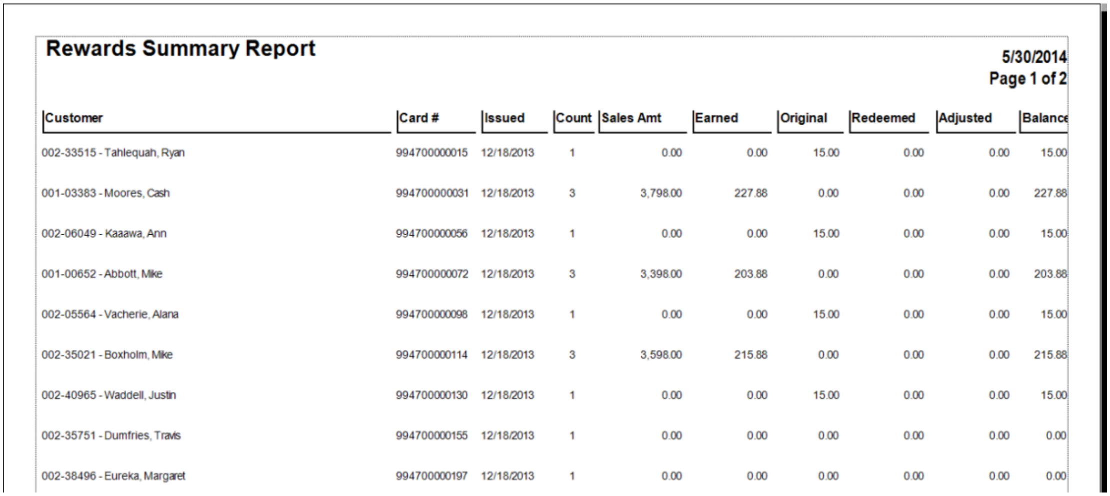
	Date	Sale #	Description	Type	Sale Amount	Rewar
001-00230 - Prion, Lenny						
	10/09/2013	001-126388	7.74ct tdw 14kwg Diamond Fashion Bracelet w/Diamonds of H/SI2	Merchandise	22,999.00	1,149.95
	001-00230 - Prion, Lenny			**1**	**22,999.00**	**1,149.95**

Data fields in the **Rewards Details** report include:

Date	The date a transaction occurred that generated rewards.
Sale #	The unique identifier of the sales activity.
Description	A description of the item sold that generated rewards.
Type	The type of sale made toward the reward.
Sale Amount	The total amount of the transaction that generated the reward.
Reward	The reward amount generated.

7.5.11.2 Rewards Summary Report

The **Rewards Summary** report generates a list of customers who have rewards cards and general activity on them.



Rewards Summary Report

5/30/2014
Page 1 of 2

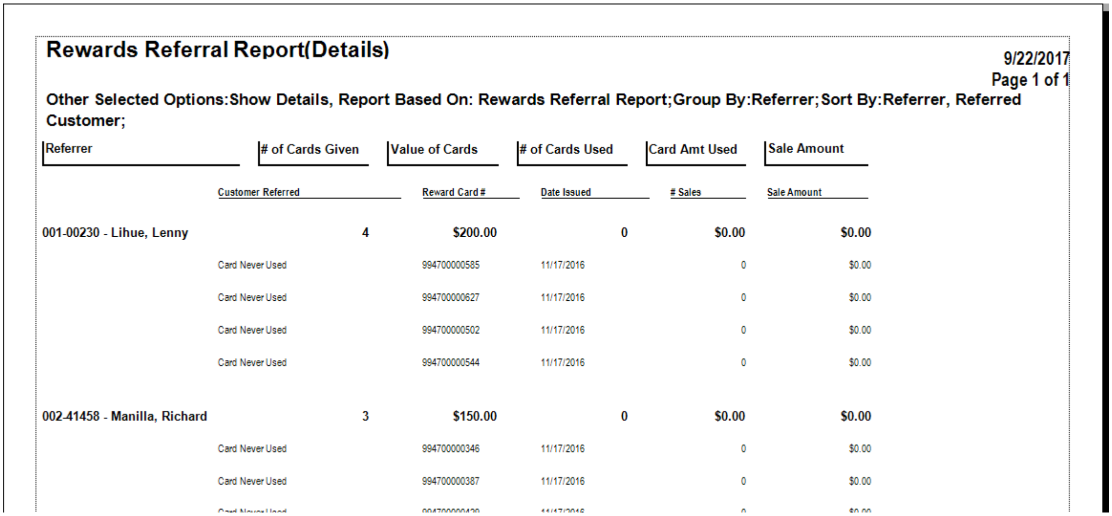
Customer	Card #	Issued	Count	Sales Amt	Earned	Original	Redeemed	Adjusted	Balance
002-33515 - Tahlequah, Ryan	994700000015	12/18/2013	1	0.00	0.00	15.00	0.00	0.00	15.00
001-03383 - Moores, Cash	994700000031	12/18/2013	3	3,798.00	227.88	0.00	0.00	0.00	227.88
002-06049 - Kaaawa, Ann	994700000056	12/18/2013	1	0.00	0.00	15.00	0.00	0.00	15.00
001-00652 - Abbott, Mike	994700000072	12/18/2013	3	3,398.00	203.88	0.00	0.00	0.00	203.88
002-05564 - Vacherie, Alana	994700000098	12/18/2013	1	0.00	0.00	15.00	0.00	0.00	15.00
002-35021 - Boxholm, Mike	994700000114	12/18/2013	3	3,598.00	215.88	0.00	0.00	0.00	215.88
002-40965 - Waddell, Justin	994700000130	12/18/2013	1	0.00	0.00	15.00	0.00	0.00	15.00
002-35751 - Dumfries, Travis	994700000155	12/18/2013	1	0.00	0.00	0.00	0.00	0.00	0.00
002-38496 - Eureka, Margaret	994700000197	12/18/2013	1	0.00	0.00	0.00	0.00	0.00	0.00

Data fields in the **Rewards Summary** report include:

Customer	The customer with the rewards card.
Card #	The unique identifier of the rewards card.
Issued	The date the rewards card was issued.
Count	How many items were purchased that accrued awards.
Sales Amount	The total purchase amount of the items that were purchased that accrued awards.
Earned	The amount that was accrued.
Original	The value originally loaded onto the card.
Redeemed	How much was redeemed from the card since it was issued.
Adjusted	Indicates adjustments that were made to the rewards account.
Balance	The amount currently available for redemption.

7.5.11.3 Rewards Referral Report

The **Rewards Referral** report shows the referral cards issued to customers for distribution, what customers have them and activity on them.



Rewards Referral Report(Details)

9/22/2017
Page 1 of 1

Other Selected Options:Show Details, Report Based On: Rewards Referral Report;Group By:Referrer;Sort By:Referrer, Referred Customer;

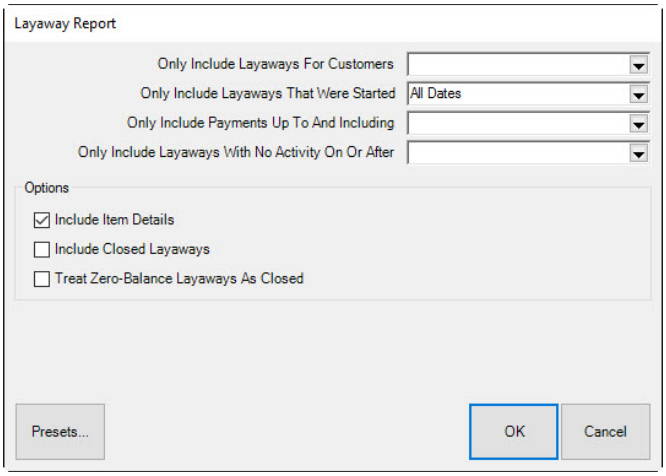
Referrer	# of Cards Given	Value of Cards	# of Cards Used	Card Amt Used	Sale Amount
	Customer Referred	Reward Card #	Date Issued	# Sales	Sale Amount
001-00230 - Lihue, Lenny	4	$200.00	0	$0.00	$0.00
	Card Never Used	994700000585	11/17/2016	0	$0.00
	Card Never Used	994700000627	11/17/2016	0	$0.00
	Card Never Used	994700000502	11/17/2016	0	$0.00
	Card Never Used	994700000544	11/17/2016	0	$0.00
002-41458 - Manilla, Richard	3	$150.00	0	$0.00	$0.00
	Card Never Used	994700000346	11/17/2016	0	$0.00
	Card Never Used	994700000387	11/17/2016	0	$0.00

Data fields in the **Rewards Referral** report include:

Referrer	The customer who was given the rewards card by the store to distribute.
# of Cards	The number of cards the referrer was given to distribute.
Value of the Cards	The initial value of the card.
# of Cards Used	The number of cards used by recipients.
Card Amt Used	The amount that has been used by recipients.
Sale Amount	The amount of total sales for cards distributed by that referrer.
Customer Referred	The customer who received the card from the referrer.
Reward Card #	The unique identifier of the rewards card given to the recipient.
Date Issued	The date the card was issued to the referrer for distribution.
# Sales	The number of sales for which the card was used.
Sale Amount	The total amount that has been used from the card.

7.5.12 Layaways Report

The **Layaways** report lists layaway details for the specified parameters. For more about report filters and settings, see the section entitled Creating a Report.

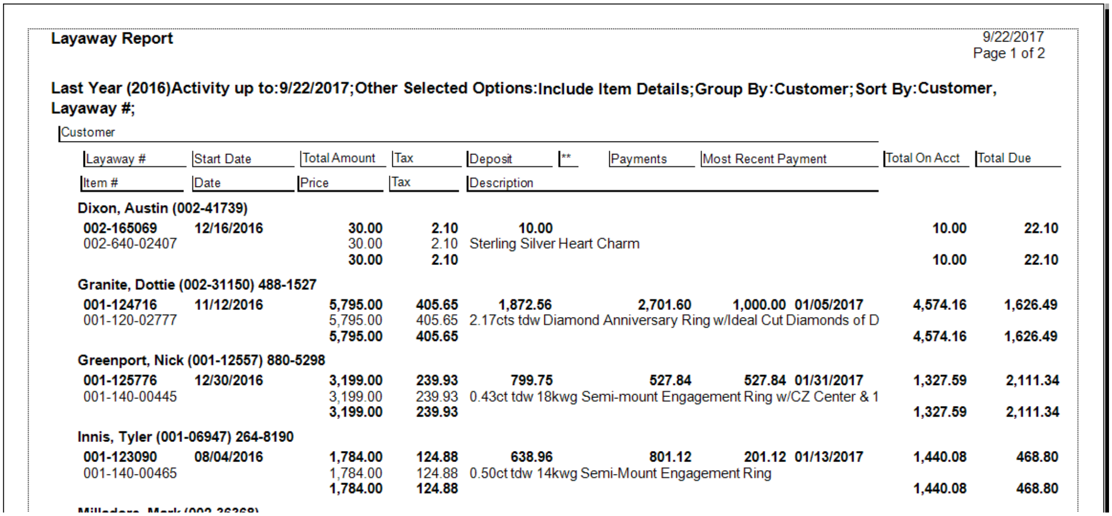


Only Include Layaways For Customers:
Only Include Layaways That Were Started: All Dates
Only Include Payments Up To And Including:
Only Include Layaways With No Activity On Or After:

Options
- ☑ Include Item Details
- ☐ Include Closed Layaways
- ☐ Treat Zero-Balance Layaways As Closed

Filter fields for the **Layaway** report include:

Only include layaways for customers	Returns layaway records for the specified customers.
Only include layaways that were started	Returns layaway records for the specified start dates.
Only include payments up to and including	Exclude payments after the specified date.
Only include layaways with no activity on or after	Returns layaway records that have had no activity for the specified date range.
Include Item Details	In the report, include details of the items put on layaway.
Include Closed Layaways	In the report, include layaways that have been picked up or canceled.
Treat Zero-Balance Layaways as Closed	In the report, consider layaways that have no outstanding balance to be closed.



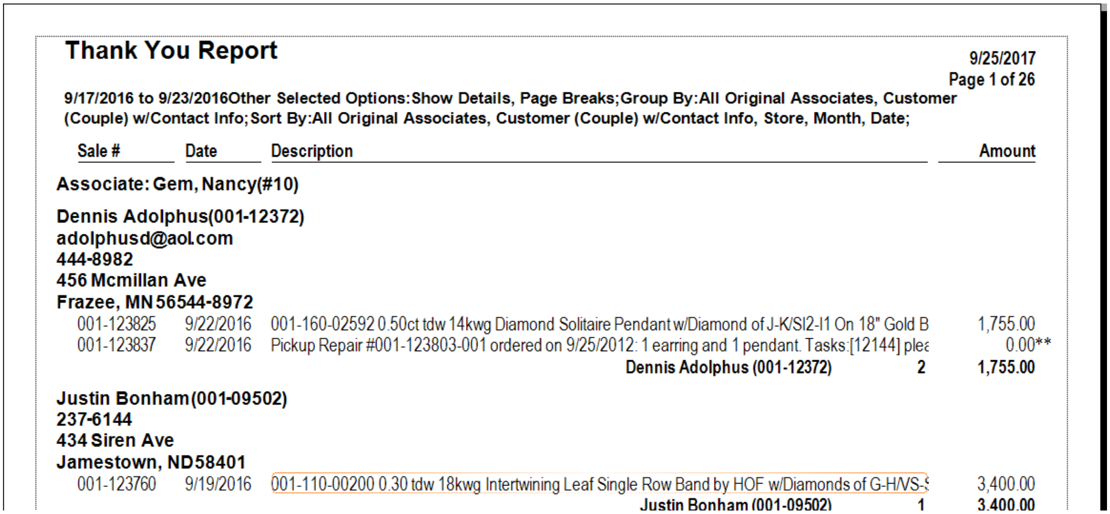
```
Layaway Report                                                                                              9/22/2017
                                                                                                            Page 1 of 2

Last Year (2016)Activity up to:9/22/2017;Other Selected Options:Include Item Details;Group By:Customer;Sort By:Customer,
Layaway #;
 |Customer
   |Layaway #  |Start Date  |Total Amount |Tax     |Deposit   |**  |Payments  |Most Recent Payment  |Total On Acct |Total Due
   |Item #     |Date        |Price        |Tax     |Description
  Dixon, Austin (002-41739)
   002-165069  12/16/2016          30.00     2.10      10.00                                             10.00       22.10
   002-640-02407                   30.00     2.10  Sterling Silver Heart Charm
                                   30.00     2.10                                                        10.00       22.10
  Granite, Dottie (002-31150) 488-1527
   001-124716  11/12/2016       5,795.00   405.65   1,872.56           2,701.60   1,000.00  01/05/2017    4,574.16    1,626.49
   001-120-02777                5,795.00   405.65  2.17cts tdw Diamond Anniversary Ring w/Ideal Cut Diamonds of D
                                5,795.00   405.65                                                     4,574.16    1,626.49
  Greenport, Nick (001-12557) 880-5298
   001-125776  12/30/2016       3,199.00   239.93     799.75             527.84     527.84  01/31/2017    1,327.59    2,111.34
   001-140-00445                3,199.00   239.93  0.43ct tdw 18kwg Semi-mount Engagement Ring w/CZ Center & 1
                                3,199.00   239.93                                                     1,327.59    2,111.34
  Innis, Tyler (001-06947) 264-8190
   001-123090  08/04/2016       1,784.00   124.88     638.96             801.12     201.12  01/13/2017    1,440.08      468.80
   001-140-00465                1,784.00   124.88  0.50ct tdw 14kwg Semi-Mount Engagement Ring
                                1,784.00   124.88                                                     1,440.08      468.80
```

Data fields in the **Layaway** report results include:

Customer	The customer's name and ID number.
Layaway #	The layaway ID number.
Item #	The ID number of the item on layaway.
Start Date	Date the item was put on layaway.
Date	Date the item was picked up or canceled.
Total Amount	Total amount of the purchase.
Price	The price of the item on layaway.
Tax	The tax calculated on the whole order.
Tax	The tax on the price of the item on layaway.
Deposit	The amount put down as an initial deposit. An asterisk in this column means the order was partially picked up or canceled; payments and deposits may have been partially applied to the items that were picked up or canceled; therefore, the other numbers might not add up.
Description	A description of the item on layaway.
Payments	A list of payments made on the layaway.
Most Recent Payment	The most recent payment amount and date.
Total on Account	The total paid toward the item.
Total Due	The total still to be paid before the item can be picked up.

7.5.13 Thank You Report

The **Thank You** report details a combination of information useful for following up with customers. It shows contact information and a sales history for customers. This might be useful in helping you to thank a customer for his business. The query for it is similar to that of activity reports. For more about report filters and settings, see the section entitled Creating a Report.



Thank You Report

9/25/2017
Page 1 of 26

9/17/2016 to 9/23/2016Other Selected Options:Show Details, Page Breaks;Group By:All Original Associates, Customer (Couple) w/Contact Info;Sort By:All Original Associates, Customer (Couple) w/Contact Info, Store, Month, Date;

Sale #	Date	Description		Amount
Associate: Gem, Nancy(#10)				
Dennis Adolphus(001-12372) **adolphusd@aol.com** **444-8982** **456 Mcmillan Ave** **Frazee, MN 56544-8972**				
001-123825	9/22/2016	001-160-02592 0.50ct tdw 14kwg Diamond Solitaire Pendant w/Diamond of J-K/SI2-I1 On 18" Gold B		1,755.00
001-123837	9/22/2016	Pickup Repair #001-123803-001 ordered on 9/25/2012: 1 earring and 1 pendant. Tasks:[12144] plea		0.00**
		Dennis Adolphus (001-12372)	**2**	**1,755.00**
Justin Bonham(001-09502) **237-6144** **434 Siren Ave** **Jamestown, ND 58401**				
001-123760	9/19/2016	001-110-00200 0.30 tdw 18kwg Intertwining Leaf Single Row Band by HOF w/Diamonds of G-H/VS-		3,400.00
		Justin Bonham (001-09502)	**1**	**3,400.00**

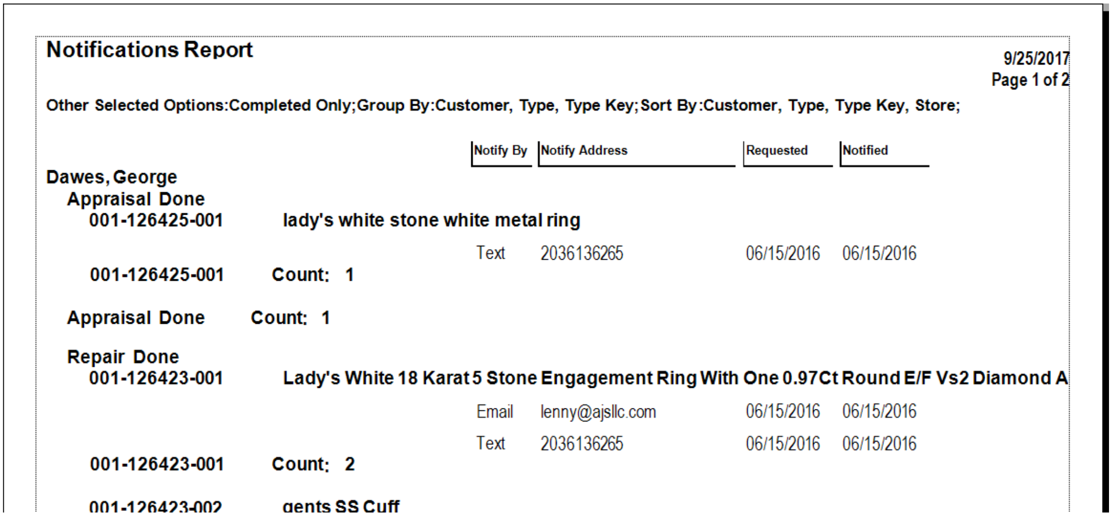
Data fields in the **Thank You** report include:

Sale #	The transaction number of the sale.
Date	The date the transaction took place.
Description	A description of the item sold.
Amount	The amount for which the item sold.
Associate	Groups customers by associate.
Customer	The customer’s name, phone, address.

In this example, Store #, Associate, and Customer represent grouping options.

7.5.14 Notifications Report

The **Notifications** report shows customer notification information and the number of notifications sent. For more about report filters and settings, see the section entitled Creating a Report.



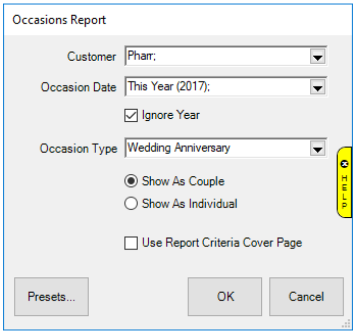
```
Notifications Report
                                                                                    9/25/2017
                                                                                   Page 1 of 2
Other Selected Options:Completed Only;Group By:Customer, Type, Type Key;Sort By:Customer, Type, Type Key, Store;

                                        Notify By  Notify Address        Requested    Notified
Dawes, George
  Appraisal Done
    001-126425-001    lady's white stone white metal ring
                                        Text       2036136265            06/15/2016   06/15/2016
    001-126425-001    Count:  1

  Appraisal Done    Count:  1

  Repair Done
    001-126423-001    Lady's White 18 Karat 5 Stone Engagement Ring With One 0.97Ct Round E/F Vs2 Diamond A
                                        Email      lenny@ajsllc.com      06/15/2016   06/15/2016
                                        Text       2036136265            06/15/2016   06/15/2016
    001-126423-001    Count:  2

    001-126423-002    gents SS Cuff
```

Data fields in the **Notifications** report include:

Customer Name	The name of the customer.
Service	The service for which the notification took place.
Item	The item on which the service was being done.
Notify By	The method of notification.
Notify Address	The destination of the notification.
Requested	When the item was needed by.
Notified	When the notification was sent.

7.5.15 Occasions Report

The **Occasions** report allows you to generate a report of customers' special occasions. This could be used to export a mailing list for reminders and sale flyers. The **Occasions** report filter requires only that you select a time frame, but you can also narrow by customer and occasion type. You can also choose whether to show the results as couple records or individual records.



Occasions Report

Customer: Pharr;

Occasion Date: This Year (2017);

☑ Ignore Year

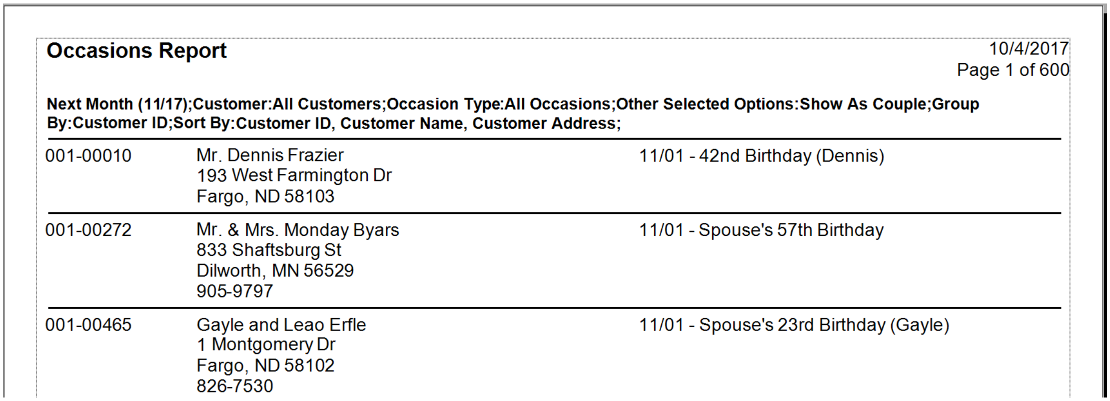
Occasion Type: Wedding Anniversary

● Show As Couple

○ Show As Individual

☐ Use Report Criteria Cover Page

The results are sorted by occasion date. For more about report filters and settings, see the section entitled Creating a Report.



Occasions Report

10/4/2017
Page 1 of 600

Next Month (11/17);Customer:All Customers;Occasion Type:All Occasions;Other Selected Options:Show As Couple;Group By:Customer ID;Sort By:Customer ID, Customer Name, Customer Address;

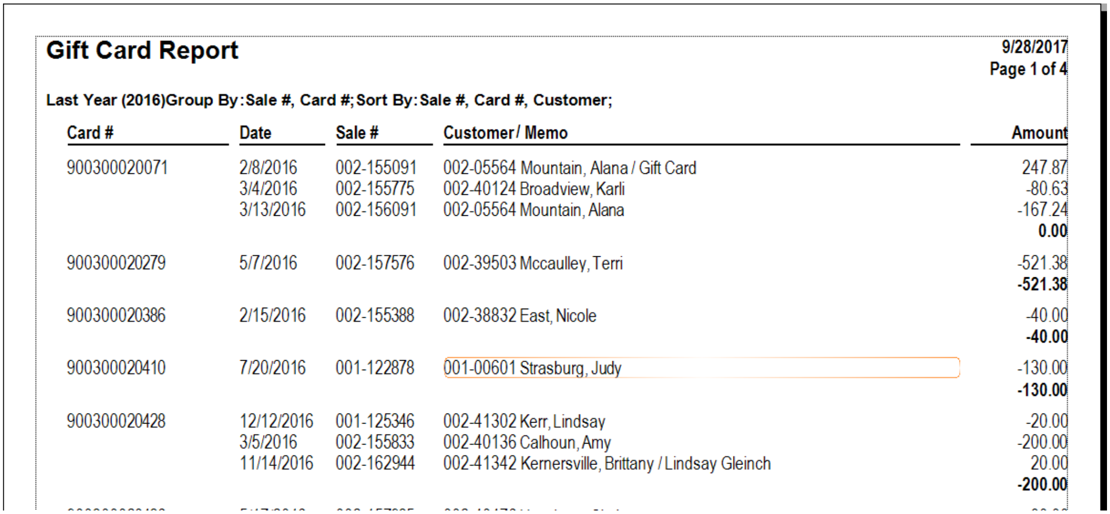
001-00010	Mr. Dennis Frazier 193 West Farmington Dr Fargo, ND 58103	11/01 - 42nd Birthday (Dennis)
001-00272	Mr. & Mrs. Monday Byars 833 Shaftsburg St Dilworth, MN 56529 905-9797	11/01 - Spouse's 57th Birthday
001-00465	Gayle and Leao Erfle 1 Montgomery Dr Fargo, ND 58102 826-7530	11/01 - Spouse's 23rd Birthday (Gayle)

Data fields in the **Occasions** report include:

Customer number	The customer's ID number.
Customer name, address, phone number	The customer's contact information.
Date and nature of the occasion	The occasion and the date.

7.5.16 Gift Card Report

The **Gift Card** report lists gift cards and their balances.



Gift Card Report

9/28/2017
Page 1 of 4

Last Year (2016)Group By:Sale #, Card #;Sort By:Sale #, Card #, Customer;

Card #	Date	Sale #	Customer/ Memo	Amount
900300020071	2/8/2016	002-155091	002-05564 Mountain, Alana / Gift Card	247.87
	3/4/2016	002-155775	002-40124 Broadview, Karli	-80.63
	3/13/2016	002-156091	002-05564 Mountain, Alana	-167.24
				0.00
900300020279	5/7/2016	002-157576	002-39503 Mccaulley, Terri	-521.38
				-521.38
900300020386	2/15/2016	002-155388	002-38832 East, Nicole	-40.00
				-40.00
900300020410	7/20/2016	001-122878	001-00601 Strasburg, Judy	-130.00
				-130.00
900300020428	12/12/2016	001-125346	002-41302 Kerr, Lindsay	-20.00
	3/5/2016	002-155833	002-40136 Calhoun, Amy	-200.00
	11/14/2016	002-162944	002-41342 Kernersville, Brittany / Lindsay Gleinch	20.00
				-200.00

Data fields in the **Gift Card** report include:

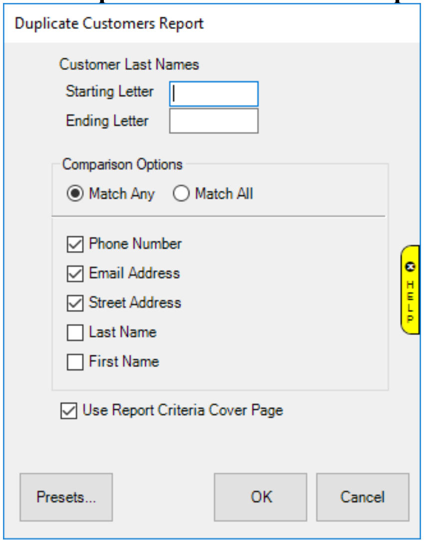
Card #	The number of the gift card.
Date	The date(s) the gift card was issued or used.
Sale #	The transaction(s) containing the gift card sale and uses.
Customer/Memo	The customer ID(s) who bought or used the card.
Amount	The amount(s) of the transaction(s) on the card.

7.5.17 Duplicate Customers

The **Duplicate Customers** report is designed to identify potential duplicate customer records. It is a good starting point when looking to clean up your customer database.

To run the report:

1. Click **Reports ▶ Customers ▶ Duplicate Customers**.



Duplicate Customers Report

Customer Last Names
Starting Letter
Ending Letter

Comparison Options
● Match Any ○ Match All

☑ Phone Number
☑ Email Address
☑ Street Address
☐ Last Name
☐ First Name

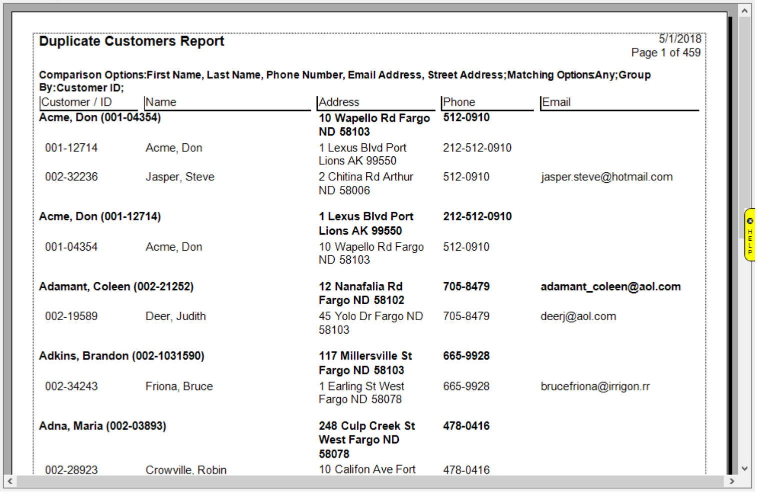
☑ Use Report Criteria Cover Page

2. Use the **Starting** and **Ending Letter** fields to limit the report to a range of customers based on last name. Leaving these blank will check the entire customer base for duplicates. Depending on the number of customers and duplicates, this could take a very long time. Also, the resulting report may be very long. If that is the case make a plan to make this more manageable by attacking it a few letters at a time.

3. The **Comparison Options** radio button works in conjunction with the checkboxes below it to control how the report searches for potential duplicates:

Match Any	Display customer records as potential duplicates if any of the criteria checked below matches.
Match All	Display customer records as potential duplicates only if ALL of the checked criteria matches (i.e. exact match).

4. Select your criteria and click **OK** to generate the report.



Duplicate Customers Report

5/1/2018
Page 1 of 459

Comparison Options:First Name, Last Name, Phone Number, Email Address, Street Address;Matching Options:Any;Group By:Customer ID;

Customer / ID	Name	Address	Phone	Email
Acme, Don (001-04354)		**10 Wapello Rd Fargo ND 58103**	**512-0910**	
001-12714	Acme, Don	1 Lexus Blvd Port Lions AK 99550	212-512-0910	
002-32236	Jasper, Steve	2 Chitina Rd Arthur ND 58006	512-0910	jasper.steve@hotmail.com
Acme, Don (001-12714)		**1 Lexus Blvd Port Lions AK 99550**	**212-512-0910**	
001-04354	Acme, Don	10 Wapello Rd Fargo ND 58103	512-0910	
Adamant, Coleen (002-21252)		**12 Nanafalia Rd Fargo ND 58102**	**705-8479**	**adamant_coleen@aol.com**
002-19589	Deer, Judith	45 Yolo Dr Fargo ND 58103	705-8479	deerj@aol.com
Adkins, Brandon (002-1031590)		**117 Millersville St Fargo ND 58103**	**665-9928**	
002-34243	Friona, Bruce	1 Earling St West Fargo ND 58078	665-9928	brucefriona@irrigon.rr
Adna, Maria (002-03893)		**248 Culp Creek St West Fargo ND 58078**	**478-0416**	
002-28923	Crowville, Robin	10 Califon Ave Fort	478-0416	

5. Each customer will be listed in bold with potential duplicates showing beneath them.

Working with the **Duplicate Customer** report:

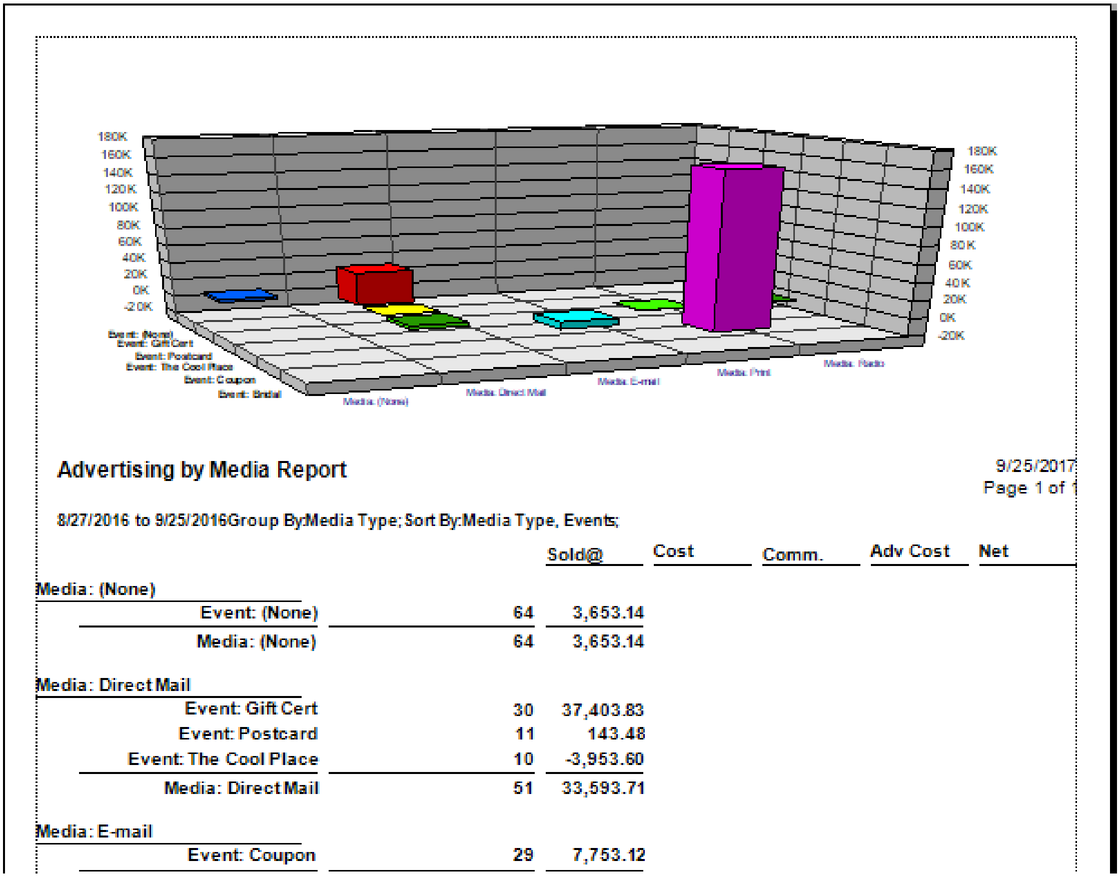
- The report is interactive. You can click on the customer's number or name to open the customer record. From there you can use the **Supervisor** menu to merge duplicates. Note that the report does NOT refresh, so it is up to you to keep track of where you left off.
- Depending on criteria selected, this report may not match exactly to the results shown when using the **Merge** utility from the customer record.
- Remember that you can use the report filter to limit this report by last name letter. This can help make the process more manageable if you find the report is too long.
- Because it is showing duplicates, you will see the same customer more than once. In the screenshot above note that customer Don Acme (001-04354) has Don Acme (001-12714) as a potential duplicate, and below that they appear again in reverse order.

7.6 Management Reports

This variety of reports is of interest to general management for planning purposes.

7.6.1 Advertising Reports

Advertising reports detail sales as a result of paid advertising and special events. Both **Media** and **Events** reports are displayed with a bar chart and a table listing results. This is where the **Why In** field in the **Point of Sale** window is useful. The advertising reports both require only a time frame for which events should be included.



Advertising by Media Report

9/25/2017
Page 1 of 1

8/27/2016 to 9/25/2016Group By:Media Type; Sort By:Media Type, Events;

		Sold@	Cost	Comm.	Adv Cost	Net
Media: (None)						
Event: (None)	64	3,653.14				
Media: (None)	64	3,653.14				
Media: Direct Mail						
Event: Gift Cert	30	37,403.83				
Event: Postcard	11	143.48				
Event: The Cool Place	10	-3,953.60				
Media: Direct Mail	51	33,593.71				
Media: E-mail						
Event: Coupon	29	7,753.12				

In the bar chart at the top, each campaign or event is shown in a different color. The ranges on either side depict the sales attributed to that event. In the table on the bottom of the report, data is as follows:

Media	The name of the publication or venue for promotion.
Event	The name of the event.

Sold@	The sales price of the item.
Cost	Cost of the goods sold.
Comm.	Commission paid on the sales.
Adv. Cost	Cost of the campaign or event.
Net	Net profit from the event.

7.6.2 Staff Reports

7.6.2.1 Commission Report

The **Commission** report details sales achieved by a particular associate and the commissions earned. It requires that you select a time frame for transactions. There is an option to include cost information, which results in the percent margin to be displayed. In addition, you can narrow the report by customer criteria, store, and station number.

Important!

There are four areas where you can work with setting commissions. In general, settings that determine commissions are located in Administrative ► Associates. At the category and vendor levels, commission overrides can be set. See the sections entitled Adding a Category and Adding a Vendor. Finally, System Options that control commission behavior. Go to System Options and use the search field to find the term "commission."

Tip!

- **On layaway, repair, and special order transactions, commission is credited to the associate who originally processed the intake regardless of who processes subsequent payments and pickups.**
- **If the Count Giveaway as a Penalty for % of Profit is checked, giveaways will affect the associates' commission. If it is not checked, giveaways will not penalize the associate's commission. This can only be calculated if the associate is set up for commission based on percent of profit. If the associate is set up for percent of retail, then the commission calculated will always be zero anyway, as the sale price for a giveaway is zero. If the associate is set up for commission based on percent of profit, and the box is checked, then the penalty for the giveaway will be the commission percentage times the giveaway item's cost (not price).**
- **Sales tax is not a factor in Commissions and therefore is not reflected in this report.**

Commission Report

9/25/2017
Page 1 of 11

9/17/2016 to 9/23/2016Other Selected Options:Calculate Commission Using Sale Line Cost, Show Margin, Show Item, Show Commission;Group By:Sales, Returns;Sort By:Sales, Returns, Salesperson;

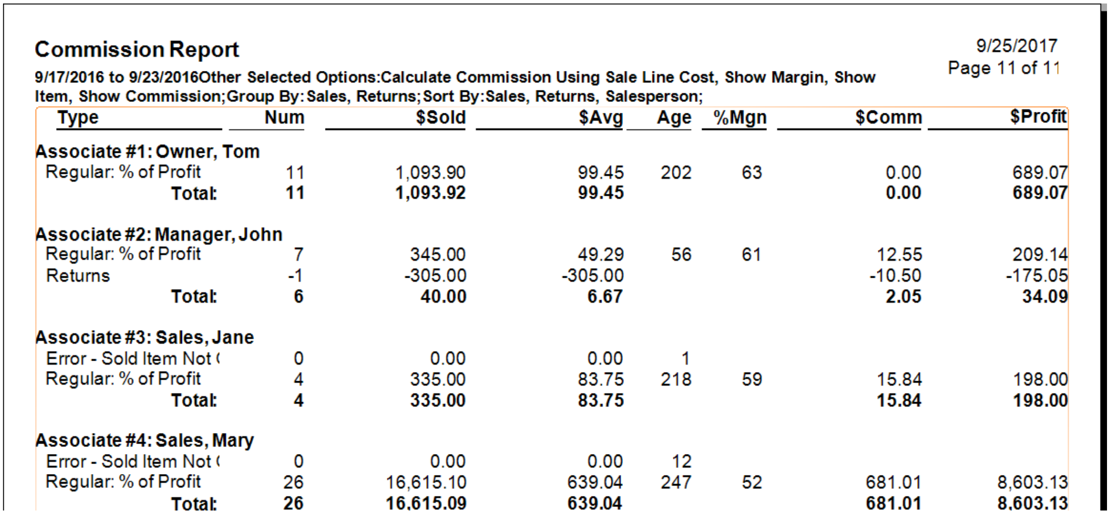
Associate #1: Owner, Tom

Sale #	Item #	Description	$ Sold	Share	%Margin	$Comm
				Age		
Regular: % of Profit						
9/19/2016						
001-123762	001-505-01420	Men's Stainless Steel Silver Color Watch w/White Fa	115.97	19	16.67	0.00
001-123764	002-445-05275	Stainless Steel & Sterling Silver Leather Bracelet	21.96	35	16.67	0.00
001-123764	002-800-02542	Stainless Steel & Black Rubber Magnetic Closure Br	30.99	54	16.68	0.00
001-123781	001-910-1000097	Jewelry Cleaner, 99 Each [001-910-00001]	495.00	1162	80.00	0.00
9/20/2016						
001-123786	001-950-1002343	Sterling Silver Bracelet With Snap Clasp [001-950-00	65.00	57	49.23	0.00
001-123786	001-950-1002344	Charm Feeling Groovy [001-950-00113]	30.00	96	56.67	0.00
9/21/2016						
001-123816	001-950-1002346	Sterling Silver Bracelet With Snap Clasp [001-950-00	65.00	58	49.23	0.00
001-123816	001-950-1002347	Charm Wildflower Walk [001-950-03919]	25.00	99	56.00	0.00
9/23/2016						
001-123839	002-445-05229	22"- Stainless Steel Cross Pendant w/ Black Carbon	25.00	126	19.96	0.00
001-123843	001-340-01312	7-8mm White Freshwater Cultured Pearl on 18" Sterl	40.00	167	74.80	0.00
001-123843	001-310-00146	14kyg 5-6mm Pearl Stud Earrings	180.00	350	75.00	0.00

Data fields in the **Commission** report include:

Associate #	The associate's ID number. The report is grouped by associate, and within associate, is grouped by: • Regular • Bonus (spiff) • Repair • Returns.
Associate Name	The associate's name.
Sale #	The transaction number of the sale.
Item #	The item number of the item(s) sold.
Description	A description of the item.
Share	Whether the sale is split between more than one associate.
$Sold	The price of the item.
Age	The length of time the item has been in stock.
%Margin	The profit margin.
$Comm	Commission earned on the sale.

A summary appears at the bottom of the report:



Commission Report

9/25/2017
Page 11 of 11

9/17/2016 to 9/23/2016Other Selected Options:Calculate Commission Using Sale Line Cost, Show Margin, Show Item, Show Commission;Group By:Sales, Returns;Sort By:Sales, Returns, Salesperson;

Type	Num	$Sold	$Avg	Age	%Mgn	$Comm	$Profit
Associate #1: Owner, Tom							
Regular: % of Profit	11	1,093.90	99.45	202	63	0.00	689.07
Total:	**11**	**1,093.92**	**99.45**			**0.00**	**689.07**
Associate #2: Manager, John							
Regular: % of Profit	7	345.00	49.29	56	61	12.55	209.14
Returns	-1	-305.00	-305.00			-10.50	-175.05
Total:	**6**	**40.00**	**6.67**			**2.05**	**34.09**
Associate #3: Sales, Jane							
Error - Sold Item Not (	0	0.00	0.00	1			
Regular: % of Profit	4	335.00	83.75	218	59	15.84	198.00
Total:	**4**	**335.00**	**83.75**			**15.84**	**198.00**
Associate #4: Sales, Mary							
Error - Sold Item Not (	0	0.00	0.00	12			
Regular: % of Profit	26	16,615.10	639.04	247	52	681.01	8,603.13
Total:	**26**	**16,615.09**	**639.04**			**681.01**	**8,603.13**

7.6.2.2 Misc. Sales Report

The **Misc. Sales** report details other kinds of sales activity conducted by each associate. It requires only that you select a time frame for transactions.

Misc Sales By Associate
9/25/2017
Page 1 of 12

9/21/2016 to 9/27/2016Group By:Sale Date;Sort By:Sale Date, Sale #;

1: Owner, Tom

	Sale #	Customer	Item Description	Amount
9/21/2016				
	001-123816	001-00000: Cash Customer	Donation: Donation - Terry Erickson Benefit	-90.00
				-90.00
9/23/2016				
	001-123843	002-20083: Ms. Denise Yancey	Summer 2012: Summer 2012 $100 Coupon	-100.00
				-100.00
				-190.00

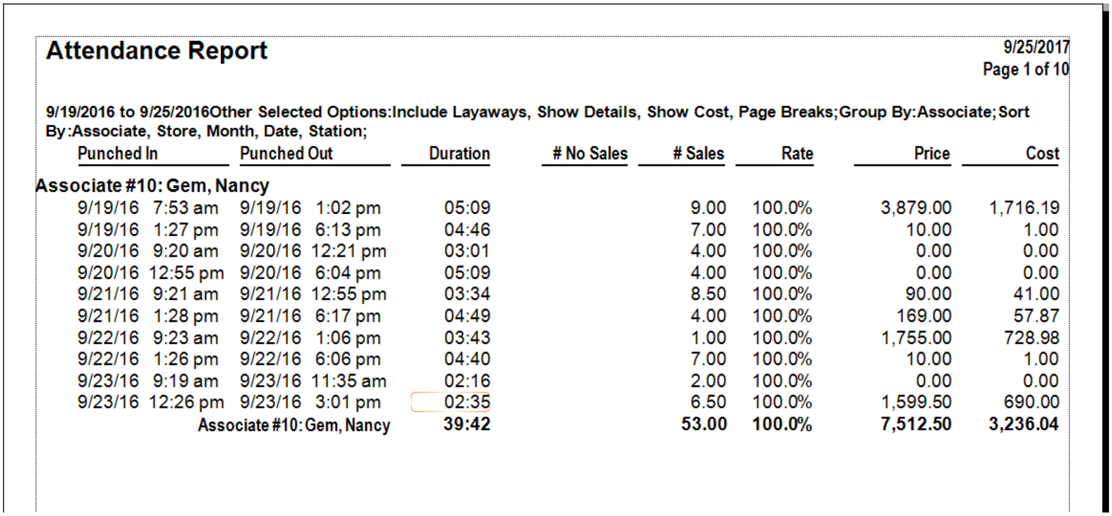
Data fields in the **Misc. Sales** report is grouped by associate and include:

Sale #	Transaction ID of the sale that included this item.
Customer	The customer's name and ID.
Item Description	A description of the item sold.
Amount	The amount for which the item sold.

- **The Misc Sales report is included here as an aid to calculating commissions on sales of miscellaneous items because there is no built-in calculation for this. If a sale were split between associates, a percentage indicator would appear.**
- **There is a much more detailed sales report under the Activity reports function.**

7.6.2.3 Attendance Report

This report totals hours and sales for associates.



Attendance Report

9/25/2017
Page 1 of 10

9/19/2016 to 9/25/2016Other Selected Options:Include Layaways, Show Details, Show Cost, Page Breaks;Group By:Associate;Sort By:Associate, Store, Month, Date, Station;

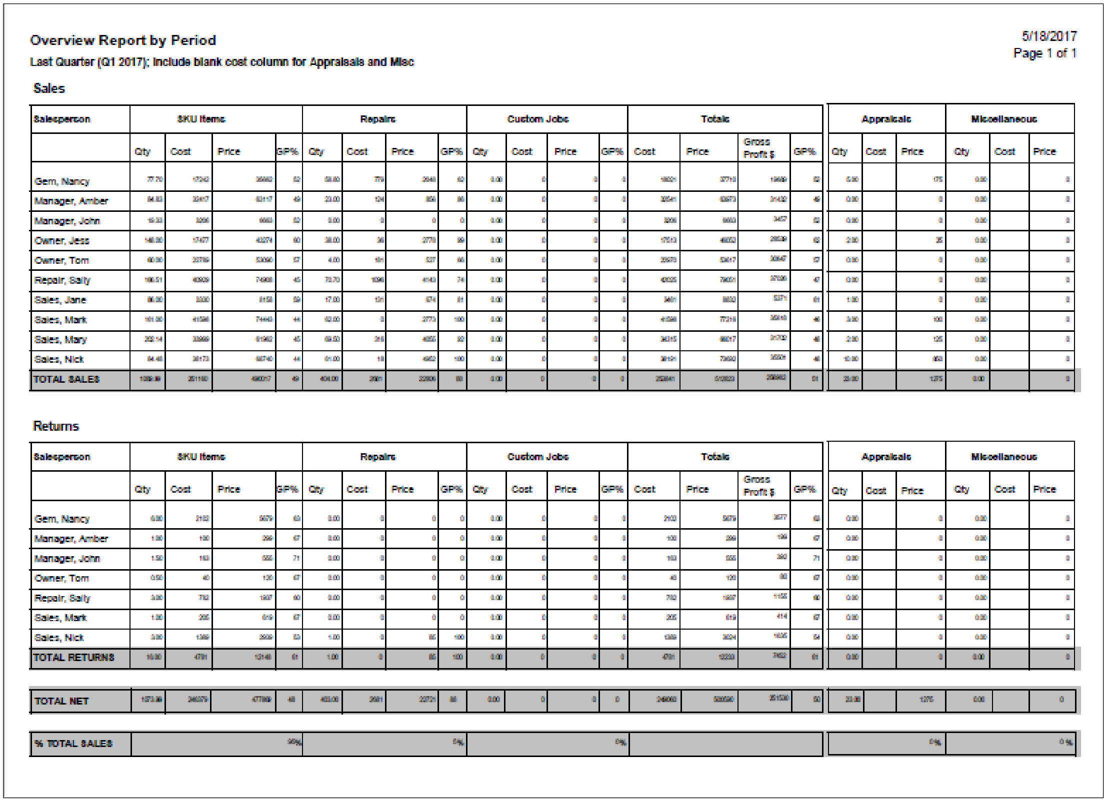
Punched In	Punched Out	Duration	# No Sales	# Sales	Rate	Price	Cost
Associate #10: Gem, Nancy							
9/19/16 7:53 am	9/19/16 1:02 pm	05:09		9.00	100.0%	3,879.00	1,716.19
9/19/16 1:27 pm	9/19/16 6:13 pm	04:46		7.00	100.0%	10.00	1.00
9/20/16 9:20 am	9/20/16 12:21 pm	03:01		4.00	100.0%	0.00	0.00
9/20/16 12:55 pm	9/20/16 6:04 pm	05:09		4.00	100.0%	0.00	0.00
9/21/16 9:21 am	9/21/16 12:55 pm	03:34		8.50	100.0%	90.00	41.00
9/21/16 1:28 pm	9/21/16 6:17 pm	04:49		4.00	100.0%	169.00	57.87
9/22/16 9:23 am	9/22/16 1:06 pm	03:43		1.00	100.0%	1,755.00	728.98
9/22/16 1:26 pm	9/22/16 6:06 pm	04:40		7.00	100.0%	10.00	1.00
9/23/16 9:19 am	9/23/16 11:35 am	02:16		2.00	100.0%	0.00	0.00
9/23/16 12:26 pm	9/23/16 3:01 pm	02:35		6.50	100.0%	1,599.50	690.00
	Associate #10: Gem, Nancy	**39:42**		**53.00**	**100.0%**	**7,512.50**	**3,236.04**

Data fields in the **Attendance** report include:

Punch In	The date and time of each punch in during the specified time period.
Punched Out	The date and time of each punch out during the specified time period.
Duration	The length of time the shift lasted.
# No Sales	The number of times the associate used **No Sale Tracking**.
# Sales	The number of sales made.
Rate	The commission rate for the associate.
Price	The price of items sold.
Cost	Cost of goods sold.

7.6.2.4 Overview Report by Period

The **Overview Report by Period** shows items sold, cost of goods sold, and pricing by associate, all broken by transaction type. And it shows returns by associate, too, for net results. There is an option to include the **Cost** column for **Appraisals** and **Miscellaneous**.



Overview Report by Period

Last Quarter (Q1 2017); Include blank cost column for Appraisals and Misc

5/18/2017
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Sales

Salesperson | SKU Items: Qty, Cost, Price, GP% | Repairs: Qty, Cost, Price, GP% | Custom Jobs: Qty, Cost, Price, GP% | Totals: Cost, Price, Gross Profit $, GP% | Appraisals: Qty, Cost, Price | Miscellaneous: Qty, Cost, Price

Gem, Nancy
Manager, Amber
Manager, John
Owner, Jess
Owner, Tom
Repair, Sally
Sales, Jane
Sales, Mark
Sales, Mary
Sales, Nick
TOTAL SALES

Returns

Salesperson | SKU Items: Qty, Cost, Price, GP% | Repairs: Qty, Cost, Price, GP% | Custom Jobs: Qty, Cost, Price, GP% | Totals: Cost, Price, Gross Profit $, GP% | Appraisals: Qty, Cost, Price | Miscellaneous: Qty, Cost, Price

Gem, Nancy
Manager, Amber
Manager, John
Owner, Tom
Repair, Sally
Sales, Mark
Sales, Nick
TOTAL RETURNS

TOTAL NET

% TOTAL SALES

Data fields in the **Overview Report by Period** include:

SKU Items

Qty Sold	The total number of units sold by the associate for the period.
Cost	The total cost of goods sold by the associate for the period.
Price	The total selling price of the items sold by the associate for the period.
GP %	The percentage of gross profit for the period for that associate and sale type based on sales price and cost.

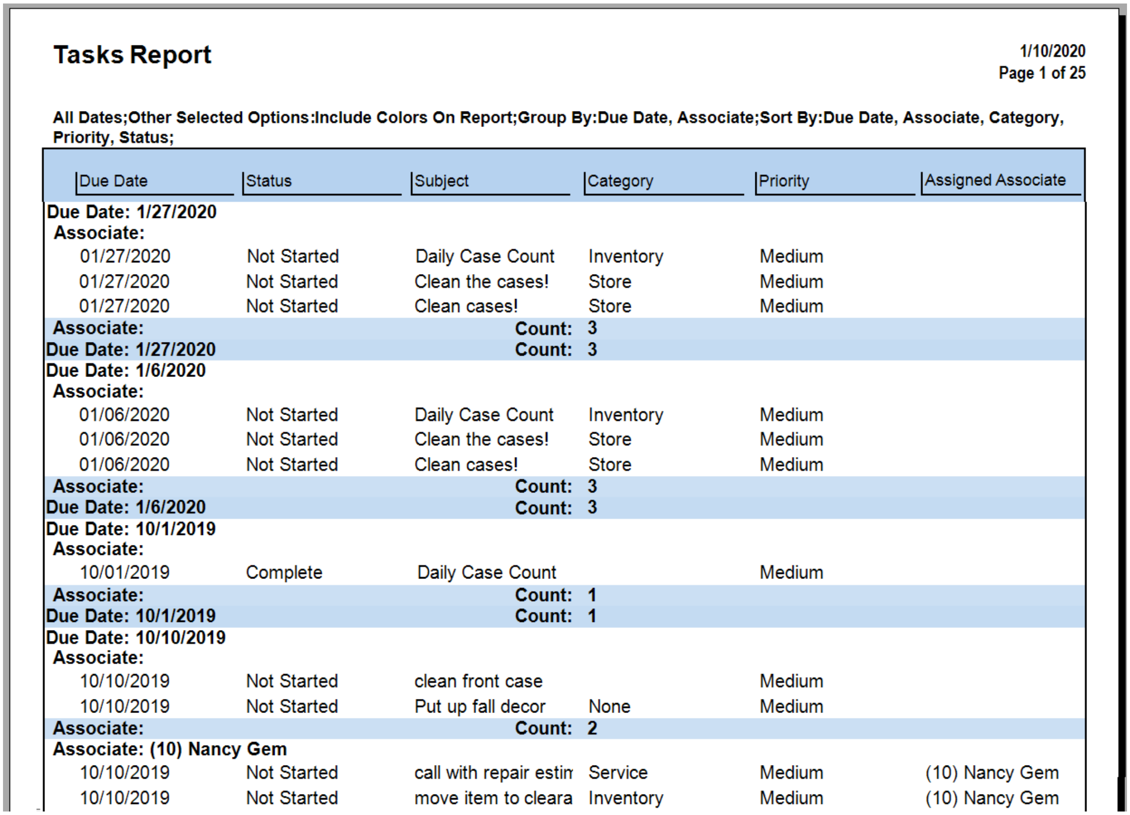
Repairs

Qty Sold	The total number of units sold by the associate for the period.

Cost	The total cost of repairs sold by the associate for the period.
Price	The total selling price of the repairs sold by the associate for the period.
GP %	The percentage of gross profit for the period for that associate and sale type based on sales price and cost.
Custom	
Qty Sold	The total number of custom job units sold by the associate for the period.
Cost	The total cost of custom items sold by the associate for the period.
Price	The total selling price of the custom items sold by the associate for the period.
GP %	The percentage of gross profit for the period for that associate and sale type based on sales price and cost.
Totals	
Qty Sold	The total number of units sold by the associate for the period.
Cost	The total cost of goods and services sold by the associate for the period.
Price	The total selling price of items, repairs, and custom jobs sold by the associate for the period.
GP %	The percentage of gross profit for the period for that associate and sale type based on sales price and cost.
Appraisals	
Qty Sold	The total number of appraisals sold by the associate for the period.
Cost	The total cost of appraisals sold by the associate for the period.
Price	The total selling price of the appraisals sold by the associate for the period.
Miscellaneous	
Qty Sold	The total number of miscellaneous sales by the associate for the period.
Cost	The total cost of miscellaneous sales by the associate for the period.
Price	The total selling price of miscellaneous sales by the associate for the period.
Total Sales	Total sales for each sale type.
Returns	The above fields are repeated for returns.
Total Returns	Total returns for each sale type.
Net Total	The net of sales and returns for each sale type.
Percent Total Sales	The percentage total sales (based on sales price) that each area constituted.

7.6.2.5 Tasks Report

The **Tasks Report** shows associate tasks and provides the due date, current status, and task information.



Tasks Report

1/10/2020
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All Dates;Other Selected Options:Include Colors On Report;Group By:Due Date, Associate;Sort By:Due Date, Associate, Category, Priority, Status;

Due Date	Status	Subject	Category	Priority	Assigned Associate
Due Date: 1/27/2020					
Associate:					
01/27/2020	Not Started	Daily Case Count	Inventory	Medium	
01/27/2020	Not Started	Clean the cases!	Store	Medium	
01/27/2020	Not Started	Clean cases!	Store	Medium	
Associate:		**Count:**	**3**		
Due Date: 1/27/2020		**Count:**	**3**		
Due Date: 1/6/2020					
Associate:					
01/06/2020	Not Started	Daily Case Count	Inventory	Medium	
01/06/2020	Not Started	Clean the cases!	Store	Medium	
01/06/2020	Not Started	Clean cases!	Store	Medium	
Associate:		**Count:**	**3**		
Due Date: 1/6/2020		**Count:**	**3**		
Due Date: 10/1/2019					
Associate:					
10/01/2019	Complete	Daily Case Count		Medium	
Associate:		**Count:**	**1**		
Due Date: 10/1/2019		**Count:**	**1**		
Due Date: 10/10/2019					
Associate:					
10/10/2019	Not Started	clean front case		Medium	
10/10/2019	Not Started	Put up fall decor	None	Medium	
Associate:		**Count:**	**2**		
Associate: (10) Nancy Gem					
10/10/2019	Not Started	call with repair estir	Service	Medium	(10) Nancy Gem
10/10/2019	Not Started	move item to cleara	Inventory	Medium	(10) Nancy Gem

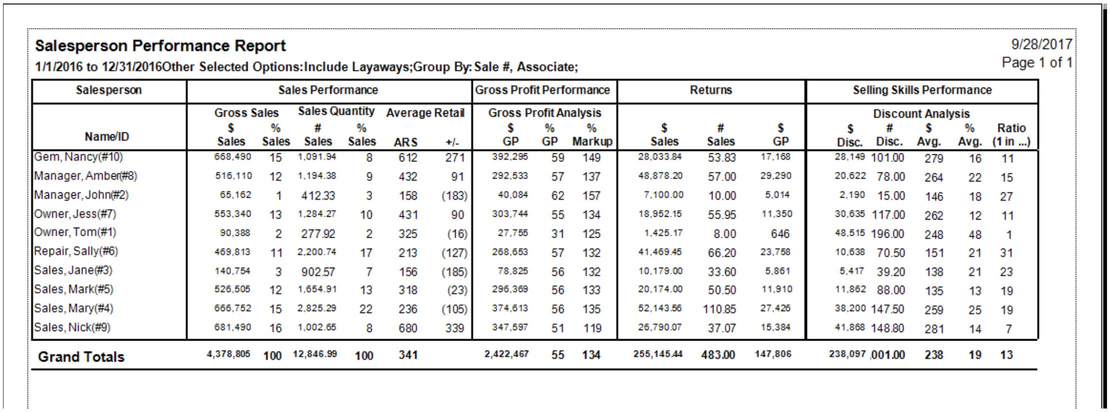
Data fields on the **Tasks Report** include:

Due Date	The date the task is due.
Status	The current status of the task.
Subject	The subject of the task.
Category	The category of the task.
Priority	The priority of the task.
Assigned Associate	The associate assigned to the task.

7.6.3 Salesperson Reports

7.6.3.1 Salesperson Performance Report

Intended to provide data for associate evaluation and coaching, the **Salesperson Performance** report provides sales performance broken down in a number of ways, by associate. The report contains inventory only and may include or exclude layaways. Special orders in progress are not counted. They are included when they are picked up.



Salesperson Performance Report

1/1/2016 to 12/31/2016Other Selected Options:Include Layaways;Group By: Sale #, Associate;

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Salesperson	Sales Performance						Gross Profit Performance			Returns			Selling Skills Performance				
	Gross Sales		Sales Quantity		Average Retail		Gross Profit Analysis						Discount Analysis				
Name/ID	$ Sales	% Sales	# Sales	% Sales	ARS	+/-	$ GP	% GP	% Markup	$ Sales	# Sales	$ GP	$ Disc.	# Disc.	$ Avg.	% Avg.	Ratio (1 in ...)
Gem, Nancy(#10)	668,490	15	1,091.94	8	612	271	392,295	59	149	28,033.84	53.83	17,168	28,149	101.00	279	16	11
Manager, Amber(#8)	516,110	12	1,194.38	9	432	91	292,533	57	137	48,878.20	57.00	29,290	20,622	78.00	264	22	15
Manager, John(#2)	65,162	1	412.33	3	158	(183)	40,084	62	157	7,100.00	10.00	5,014	2,190	15.00	146	18	27
Owner, Jess(#7)	553,340	13	1,284.27	10	431	90	303,744	55	134	18,952.15	55.95	11,350	30,635	117.00	262	12	11
Owner, Tom(#1)	90,388	2	277.92	2	325	(16)	27,755	31	125	1,425.17	8.00	646	48,515	196.00	248	48	1
Repair, Sally(#6)	469,813	11	2,200.74	17	213	(127)	268,653	57	132	41,469.45	66.20	23,758	10,638	70.50	151	21	31
Sales, Jane(#3)	140,754	3	902.57	7	156	(185)	78,825	56	132	10,179.00	33.60	5,861	5,417	39.20	138	21	23
Sales, Mark(#5)	526,505	12	1,654.91	13	318	(23)	296,369	56	133	20,174.00	50.50	11,910	11,862	88.00	135	13	19
Sales, Mary(#4)	666,752	15	2,825.29	22	236	(105)	374,613	56	135	52,143.56	110.85	27,426	38,200	147.50	259	25	19
Sales, Nick(#9)	681,490	16	1,002.65	8	680	339	347,597	51	119	26,790.07	37.07	15,384	41,868	148.80	281	14	7
Grand Totals	4,378,805	100	12,846.99	100	341		2,422,467	55	134	255,145.44	483.00	147,806	238,097	,001.00	238	19	13

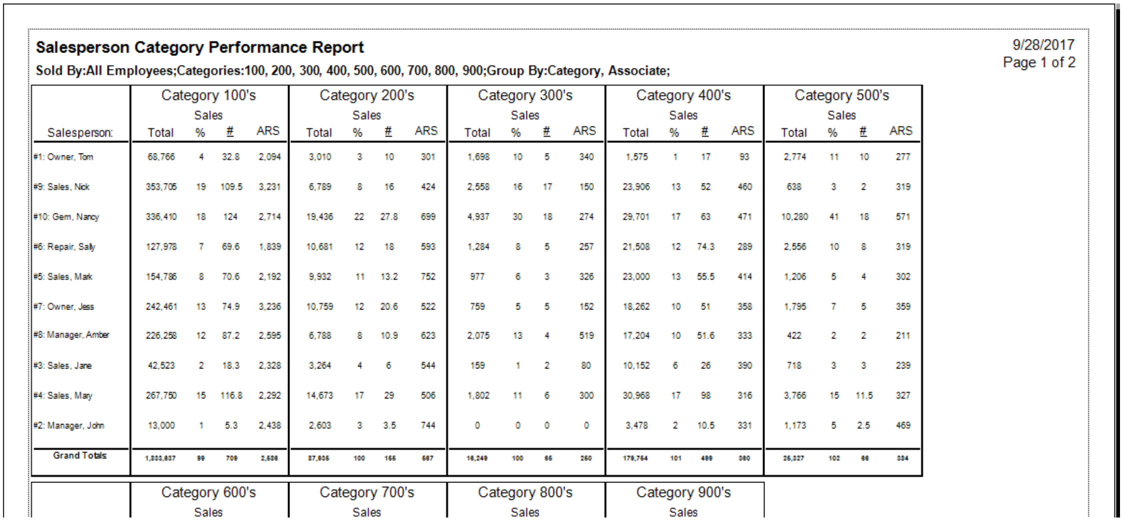
Data fields in the **Salesperson Performance** report include:

Name	The associate's name.
Sales Performance	Sales performance as broken down below:
Gross Sales	Gross sales are broken down by dollars and percentage of total sales by dollars (i.e., $ = 34,500; % = 12). This would mean that the sales person sold $34,500 at retail that was 12 percent of all sales by dollar amount.
Sales Quantity	**Sales quantity** is broken down by number of sales and percentage of sales by quantity (i.e., # = 27; % = 8).
Average Retail	Average retail sale (**ARS**) and +/- which is the difference from the average retail sale amount each salesperson achieved (i.e., $34,500 in sales divided by 27 (the # of sales) = ARS of $1,278). If the average sale for everyone in the store was $555, this sales person would have a +723 in the **+/-** column indicating their average sale was that much greater than the stores.
Gross Profit Performance	**Gross Profit Performance** has three columns of information, one identified as dollars (**$**), another by **% of Gross Profit** and another as **% of Markup**. Gross profit is the amount that the store made on the sale above the cost of the item. **GP%** is the percentage of the total sale that was profit (an important retail metric) and **% Markup** is the multiplier a retailer would have to use to achieve the profit level on the report. Example: Item costs $48 and sells for $100, the GP would be 52%. To achieve a 52% gross profit margin, items would have to be marked up 109% (48 + (48 x 1.09) = 100).

Returns	The **Returns** section has three columns also: **$ Sales**, **# Sales**, and **$ GP**. **$ Sales** is just that the dollar amount of return sales, **# Sales** is also just that the number of returns and **$ GP** is the amount of profit that was lost to returns.
Selling Skills Performance	**Selling Skills Performance** is intended to measure the effectiveness of the salesperson. The columns are **$ Disc**, **# Disc**, **$ Avg**, **% Avg**, and **Ratio**. **$ Disc** is total discounted dollars, **# Disc** is the number of sales a discount was applied to, **$ Avg** is the average dollar discount per discounted sale, and **% Avg** is the average percentage of discount per discounted sale. **Ratio** is the number of sales with a discounted price represented as a ratio (i.e., 1 in 5; 1 in 9; 1 in 17, etc.).

7.6.3.2 Salesperson Category Performance Report

The **Salesperson Category Performance** report shows data similar to that shown in the **Salesperson Performance** report, but by category. It summarizes sales results and divides the same sales into major categories (i.e., Cat 100, Cat 200, etc.), to determine where sales persons' skills are. This report will reveal in what category sales people are making sales and perhaps illustrate difficulty with watches or high-priced diamond merchandise. Layaways may or may not be included as with the report and special orders in progress are not included.



Salesperson Category Performance Report

Sold By:All Employees;Categories:100, 200, 300, 400, 500, 600, 700, 800, 900;Group By:Category, Associate;

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	Category 100's				Category 200's				Category 300's				Category 400's				Category 500's			
	Sales				Sales				Sales				Sales				Sales			
Salesperson:	Total	%	#	ARS	Total	%	#	ARS	Total	%	#	ARS	Total	%	#	ARS	Total	%	#	ARS
#1: Owner, Tom	68,766	4	32.8	2,094	3,010	3	10	301	1,698	10	5	340	1,575	1	17	93	2,774	11	10	277
#9: Sales, Nick	353,705	19	109.5	3,231	6,789	8	16	424	2,558	16	17	150	23,906	13	52	460	638	3	2	319
#10: Gem, Nancy	336,410	18	124	2,714	19,436	22	27.8	699	4,937	30	18	274	29,701	17	63	471	10,280	41	18	571
#6: Repair, Sally	127,978	7	69.6	1,839	10,681	12	18	593	1,284	8	5	257	21,508	12	74.3	289	2,556	10	8	319
#5: Sales, Mark	154,786	8	70.6	2,192	9,932	11	13.2	752	977	6	3	326	23,000	13	55.5	414	1,206	5	4	302
#7: Owner, Jess	242,461	13	74.9	3,236	10,759	12	20.6	522	759	5	5	152	18,262	10	51	358	1,795	7	5	359
#8: Manager, Amber	226,258	12	87.2	2,595	6,788	8	10.9	623	2,075	13	4	519	17,204	10	51.6	333	422	2	2	211
#3: Sales, Jane	42,523	2	18.3	2,328	3,264	4	6	544	159	1	2	80	10,152	6	26	390	718	3	3	239
#4: Sales, Mary	267,750	15	116.8	2,292	14,673	17	29	506	1,802	11	6	300	30,968	17	98	316	3,766	15	11.5	327
#2: Manager, John	13,000	1	5.3	2,438	2,603	3	3.5	744	0	0	0	0	3,478	2	10.5	331	1,173	5	2.5	469
Grand Totals	1,833,837	99	709	2,586	87,935	100	155	567	16,249	100	65	250	178,754	101	499	360	25,327	102	66	384

	Category 600's	Category 700's	Category 800's	Category 900's
	Sales	Sales	Sales	Sales

Data fields in the **Salesperson Category Performance** report include:

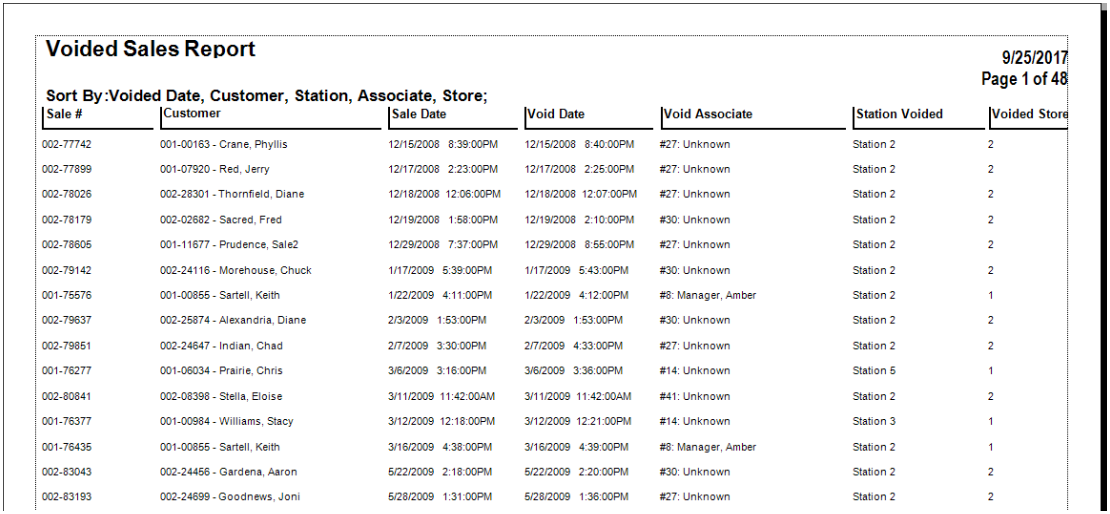
Salesperson	The associate's name.
Category	The category for which the breakdown is shown.
Sales	Sales performance as broken down below:
Total	The total sales by the associate in that category.
Percentage	Percentage of that the associate's sales that fall in that category.
Number	The number of sales made in that category.
Average Retail	Average retail sale (**ARS**) and +/- which is the difference from the average retail sale amount each salesperson achieve.

7.6.4 Exceptions Reports

Exceptions reports are designed to help research inventory and associate activities such as voided sales, deleted inventory, inventory with cost changes, and customer-returned items.

7.6.4.1 Voided Sales

The **Voided Sales** report provides a list of voided transactions along with information such as the original sale date, who performed the void, and where.



Voided Sales Report

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Sort By:Voided Date, Customer, Station, Associate, Store;

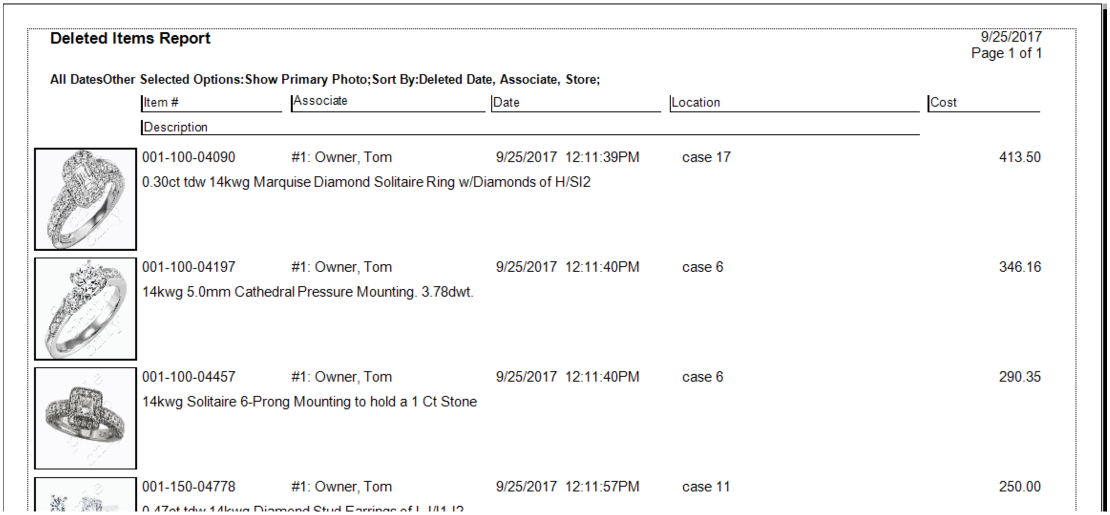
Sale #	Customer	Sale Date	Void Date	Void Associate	Station Voided	Voided Store
002-77742	001-00163 - Crane, Phyllis	12/15/2008 8:39:00PM	12/15/2008 8:40:00PM	#27: Unknown	Station 2	2
002-77899	001-07920 - Red, Jerry	12/17/2008 2:23:00PM	12/17/2008 2:25:00PM	#27: Unknown	Station 2	2
002-78026	002-28301 - Thornfield, Diane	12/18/2008 12:06:00PM	12/18/2008 12:07:00PM	#27: Unknown	Station 2	2
002-78179	002-02682 - Sacred, Fred	12/19/2008 1:58:00PM	12/19/2008 2:10:00PM	#30: Unknown	Station 2	2
002-78605	001-11677 - Prudence, Sale2	12/29/2008 7:37:00PM	12/29/2008 8:55:00PM	#27: Unknown	Station 2	2
002-79142	002-24116 - Morehouse, Chuck	1/17/2009 5:39:00PM	1/17/2009 5:43:00PM	#30: Unknown	Station 2	2
001-75576	001-00855 - Sartell, Keith	1/22/2009 4:11:00PM	1/22/2009 4:12:00PM	#8: Manager, Amber	Station 2	1
002-79637	002-25874 - Alexandria, Diane	2/3/2009 1:53:00PM	2/3/2009 1:53:00PM	#30: Unknown	Station 2	2
002-79851	002-24647 - Indian, Chad	2/7/2009 3:30:00PM	2/7/2009 4:33:00PM	#27: Unknown	Station 2	2
001-76277	001-06034 - Prairie, Chris	3/6/2009 3:16:00PM	3/6/2009 3:36:00PM	#14: Unknown	Station 5	1
002-80841	002-08398 - Stella, Eloise	3/11/2009 11:42:00AM	3/11/2009 11:42:00AM	#41: Unknown	Station 2	2
001-76377	001-00984 - Williams, Stacy	3/12/2009 12:18:00PM	3/12/2009 12:21:00PM	#14: Unknown	Station 3	1
001-76435	001-00855 - Sartell, Keith	3/16/2009 4:38:00PM	3/16/2009 4:39:00PM	#8: Manager, Amber	Station 2	1
002-83043	002-24456 - Gardena, Aaron	5/22/2009 2:18:00PM	5/22/2009 2:20:00PM	#30: Unknown	Station 2	2
002-83193	002-24699 - Goodnews, Joni	5/28/2009 1:31:00PM	5/28/2009 1:36:00PM	#27: Unknown	Station 2	2

Data fields in the **Voided Sales** report include:

Sale #	The transaction number of the original sale that was voided.
Customer	The customer involved in the transaction that was voided.
Sale Date	The date of the original transaction that was voided.
Void Date	The date the transaction was voided.
Associate	The associate who made the void.
Station Voided	The station at which the void was made.
Voided Store	The store at which the void was made.

7.6.4.2 Deleted Items

The **Deleted Items** report provides a list of items that were deleted from the system. If the bulk master was deleted by an earlier version of The Edge, bulk item costs may not be reflected.



Deleted Items Report

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All DatesOther Selected Options:Show Primary Photo;Sort By:Deleted Date, Associate, Store;

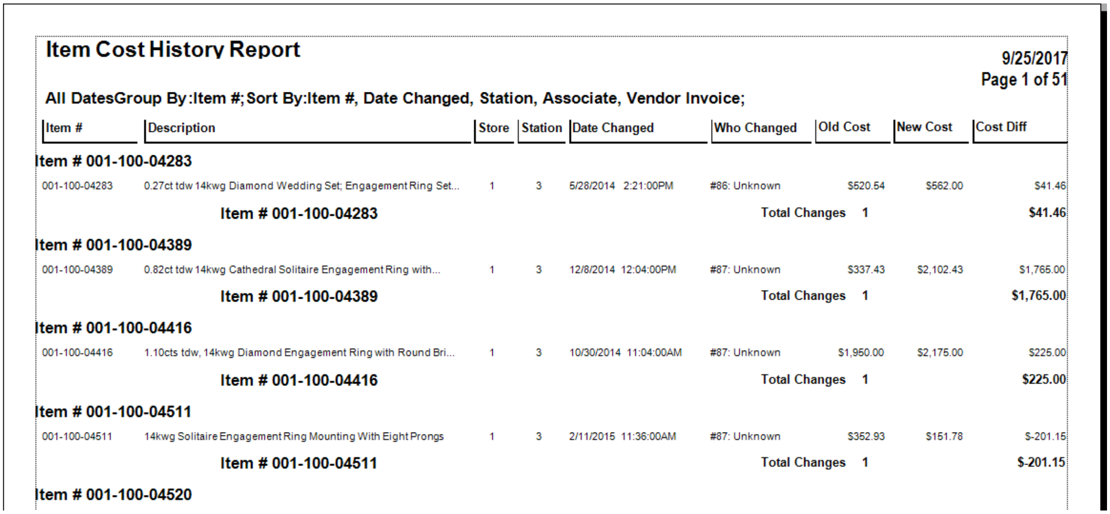
Item # Description	Associate	Date	Location	Cost
001-100-04090 0.30ct tdw 14kwg Marquise Diamond Solitaire Ring w/Diamonds of H/SI2	#1: Owner, Tom	9/25/2017 12:11:39PM	case 17	413.50
001-100-04197 14kwg 5.0mm Cathedral Pressure Mounting. 3.78dwt.	#1: Owner, Tom	9/25/2017 12:11:40PM	case 6	346.16
001-100-04457 14kwg Solitaire 6-Prong Mounting to hold a 1 Ct Stone	#1: Owner, Tom	9/25/2017 12:11:40PM	case 6	290.35
001-150-04778 0.47ct tdw 14kwg Diamond Stud Earrings of I, I/I1 I2	#1: Owner, Tom	9/25/2017 12:11:57PM	case 11	250.00

Data fields in the **Deleted Items** report include:

Item #	The item number of the item that was deleted.
Description	The description of the item from the item record.
Associate	The associate who deleted the item.
Date	The date the item was deleted.
Location	The location where the item was housed.
Cost	The cost of the item.

7.6.4.3 Cost History

The **Cost History** report shows a history of changes to the cost of an item. Older versions of The Edge might not have recorded cost history for bulk items. Be aware that if a single item was changed more than once, it may be represented on this report more than one time. Therefore, the value of the grand total may be inflated.



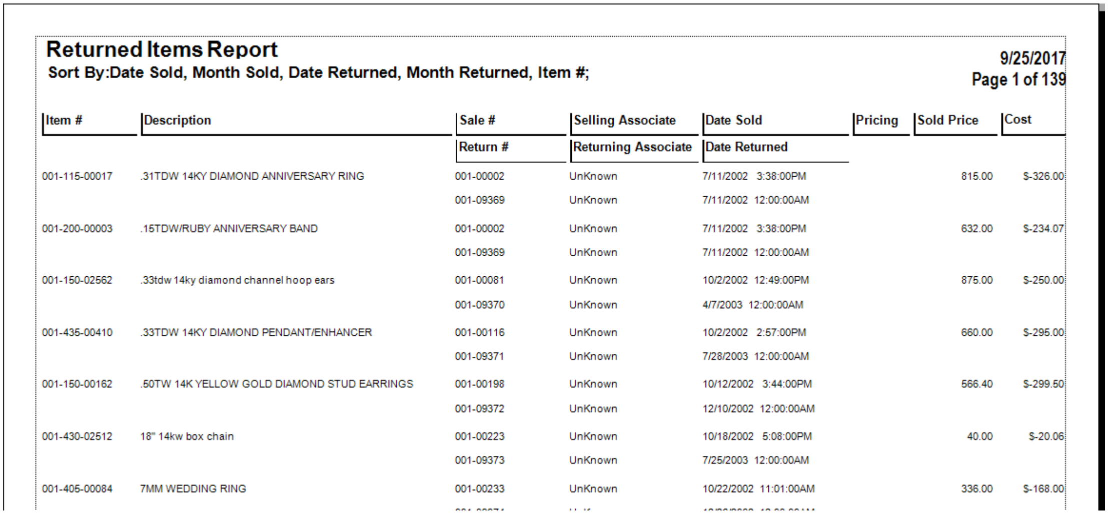
```
Item Cost History Report                                                                                      9/25/2017
                                                                                                              Page 1 of 51
All DatesGroup By:Item #;Sort By:Item #, Date Changed, Station, Associate, Vendor Invoice;
Item #        Description                                               Store  Station  Date Changed           Who Changed     Old Cost    New Cost    Cost Diff
Item # 001-100-04283
001-100-04283 0.27ct tdw 14kwg Diamond Wedding Set; Engagement Ring Set...  1     3     5/28/2014  2:21:00PM   #86: Unknown    $520.54     $562.00       $41.46
                         Item # 001-100-04283                                                             Total Changes   1                     $41.46
Item # 001-100-04389
001-100-04389 0.82ct tdw 14kwg Cathedral Solitaire Engagement Ring with...  1     3     12/8/2014  12:04:00PM  #87: Unknown    $337.43     $2,102.43   $1,765.00
                         Item # 001-100-04389                                                             Total Changes   1                  $1,765.00
Item # 001-100-04416
001-100-04416 1.10cts tdw, 14kwg Diamond Engagement Ring with Round Bri...  1     3     10/30/2014  11:04:00AM #87: Unknown    $1,950.00   $2,175.00     $225.00
                         Item # 001-100-04416                                                             Total Changes   1                    $225.00
Item # 001-100-04511
001-100-04511 14kwg Solitaire Engagement Ring Mounting With Eight Prongs    1     3     2/11/2015  11:36:00AM  #87: Unknown    $352.93     $151.78     $-201.15
                         Item # 001-100-04511                                                             Total Changes   1                   $-201.15
Item # 001-100-04520
```

Data fields in the **Cost History** report include:

Item #	The item number of the item.
Description	The description of the item from the item record.
Store	The store where the item is currently located.
Station	The station at which the cost was changed.
Date Changed	The date the cost was changed.
Who Changed	The associate who changed the cost.
Old Cost	The cost of the item prior to this change.
New Cost	The cost of the item after this change.
Cost Difference	The amount of this change in cost.

7.6.4.4 *Customer-Returned Items*

The **Returned Items** report provides a listing of items returned by customers and put back in stock. It contains detailed information about the item.



Returned Items Report

Sort By:Date Sold, Month Sold, Date Returned, Month Returned, Item #;

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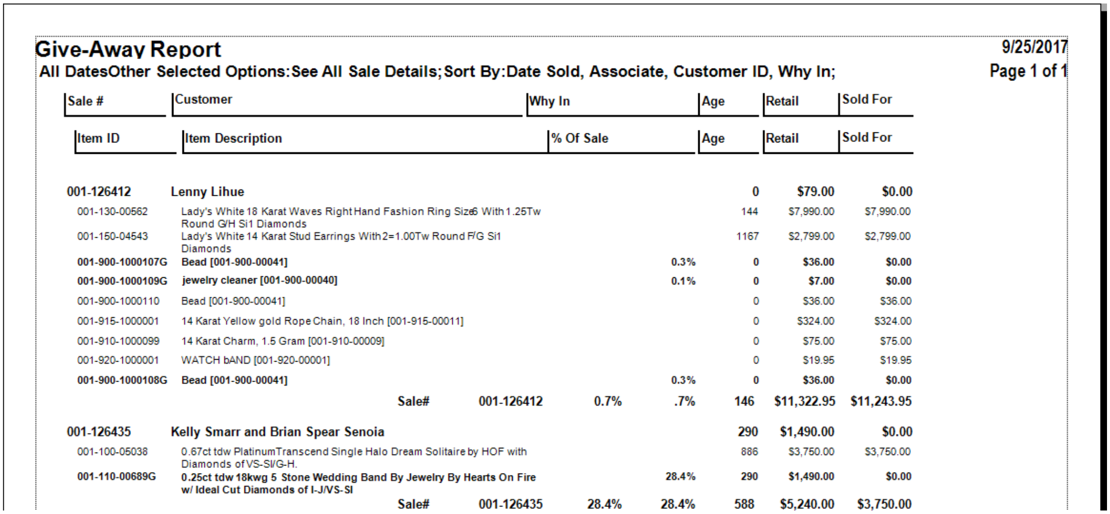
Item #	Description	Sale #	Selling Associate	Date Sold	Pricing	Sold Price	Cost
		Return #	Returning Associate	Date Returned			
001-115-00017	.31TDW 14KY DIAMOND ANNIVERSARY RING	001-00002	UnKnown	7/11/2002 3:38:00PM		815.00	$-326.00
		001-09369	UnKnown	7/11/2002 12:00:00AM			
001-200-00003	.15TDW/RUBY ANNIVERSARY BAND	001-00002	UnKnown	7/11/2002 3:38:00PM		632.00	$-234.07
		001-09369	UnKnown	7/11/2002 12:00:00AM			
001-150-02562	.33tdw 14ky diamond channel hoop ears	001-00081	UnKnown	10/2/2002 12:49:00PM		875.00	$-250.00
		001-09370	UnKnown	4/7/2003 12:00:00AM			
001-435-00410	.33TDW 14KY DIAMOND PENDANT/ENHANCER	001-00116	UnKnown	10/2/2002 2:57:00PM		660.00	$-295.00
		001-09371	UnKnown	7/28/2003 12:00:00AM			
001-150-00162	.50TW 14K YELLOW GOLD DIAMOND STUD EARRINGS	001-00198	UnKnown	10/12/2002 3:44:00PM		566.40	$-299.50
		001-09372	UnKnown	12/10/2002 12:00:00AM			
001-430-02512	18" 14kw box chain	001-00223	UnKnown	10/18/2002 5:08:00PM		40.00	$-20.06
		001-09373	UnKnown	7/25/2003 12:00:00AM			
001-405-00084	7MM WEDDING RING	001-00233	UnKnown	10/22/2002 11:01:00AM		336.00	$-168.00

Data fields in the **Returned Items** report include:

Item #	The item number of the item.
Description	The description of the item from the item record.
Sale #	The transaction number for the initial sale.
Return #	The transaction number for the return.
Selling Associate	The associate who initially sold the item.
Returning Associate	The associate who took the return.
Date Sold	The date of the initial sale.
Date Returned	The date of the return.
Pricing	The pricing method, i.e., bulk, etc. If it is blank, it is fine-item pricing.
Sold Price	Price of the item when sold.
Cost	Cost of the time when sold.

7.6.5 Giveaway (Management) Report

The **Giveaway** report found on the **Management Reports** menu provides a breakdown of promotional giveaways by age and sale.



Give-Away Report

All DatesOther Selected Options:See All Sale Details;Sort By:Date Sold, Associate, Customer ID, Why In;

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Sale #	Customer			Why In	Age	Retail	Sold For
Item ID	Item Description			% Of Sale	Age	Retail	Sold For
001-126412	**Lenny Lihue**				**0**	**$79.00**	**$0.00**
001-130-00562	Lady's White 18 Karat Waves Right Hand Fashion Ring Size6 With 1.25Tw Round G/H Si1 Diamonds				144	$7,990.00	$7,990.00
001-150-04543	Lady's White 14 Karat Stud Earrings With 2=1.00Tw Round F/G Si1 Diamonds				1167	$2,799.00	$2,799.00
001-900-1000107G	**Bead [001-900-00041]**			**0.3%**	**0**	**$36.00**	**$0.00**
001-900-1000109G	**jewelry cleaner [001-900-00040]**			**0.1%**	**0**	**$7.00**	**$0.00**
001-900-1000110	Bead [001-900-00041]				0	$36.00	$36.00
001-915-1000001	14 Karat Yellow gold Rope Chain, 18 Inch [001-915-00011]				0	$324.00	$324.00
001-910-1000099	14 Karat Charm, 1.5 Gram [001-910-00009]				0	$75.00	$75.00
001-920-1000001	WATCH bAND [001-920-00001]				0	$19.95	$19.95
001-900-1000108G	**Bead [001-900-00041]**			**0.3%**	**0**	**$36.00**	**$0.00**
	Sale#	**001-126412**	**0.7%**	**.7%**	**146**	**$11,322.95**	**$11,243.95**
001-126435	**Kelly Smarr and Brian Spear Senoia**				**290**	**$1,490.00**	**$0.00**
001-100-05038	0.67ct tdw Platinum Transcend Single Halo Dream Solitaire by HOF with Diamonds of VS-SI/G-H.				886	$3,750.00	$3,750.00
001-110-00689G	**0.25ct tdw 18kwg 5 Stone Wedding Band By Jewelry By Hearts On Fire w/ Ideal Cut Diamonds of I-J/VS-SI**			**28.4%**	**290**	**$1,490.00**	**$0.00**
	Sale#	**001-126435**	**28.4%**	**28.4%**	**588**	**$5,240.00**	**$3,750.00**

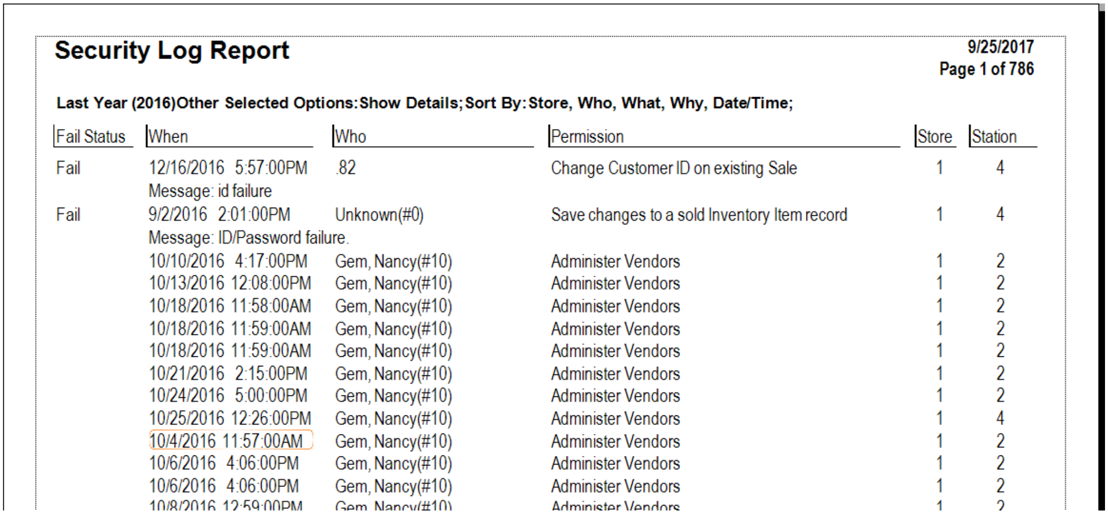
Data fields in the **Giveaway (Management)** report include:

Sale #	The transaction ID for the sale that contained the giveaway.
Customer	The customer to whom the item was given away.
Why In	The initial reason for the customer's visit to the store.
Age	The number of days the item was in stock.
Retail	The retail price of the item.
Sold For	What the price was at point of sale (after the giveaway).
Item ID	The item number.
Item Description	The description of the item.
% of Sale	The amount of the sale that it would have represented if sold at retail.

7.6.6 Security Log

The **Security Log** report details certain associate activities.

On this report, the criteria section and page will list all the permissions to be checked, which could be very lengthy. To avoid this, use Pick All from the Permissions drop-down menu in the options window; in that case, criteria will simply read "Pick All." If you manually unselect any permissions after that, the lengthy, specific list will be returned.



Security Log Report

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Last Year (2016)Other Selected Options:Show Details;Sort By:Store, Who, What, Why, Date/Time;

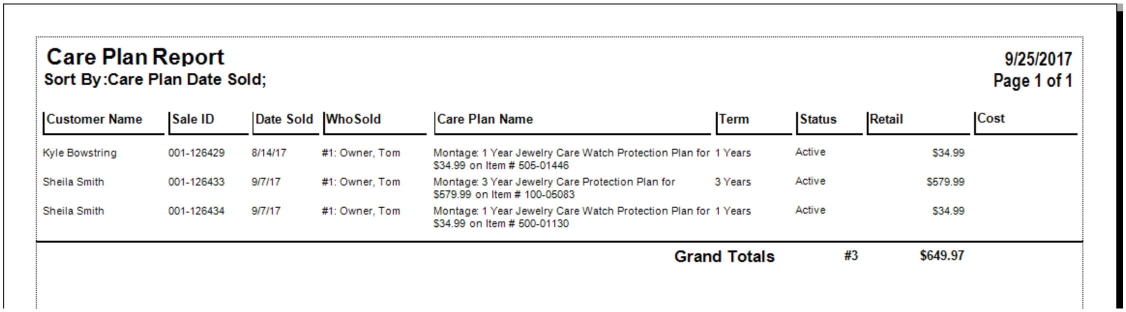
Fail Status	When	Who	Permission	Store	Station
Fail	12/16/2016 5:57:00PM	.82	Change Customer ID on existing Sale	1	4
	Message: id failure				
Fail	9/2/2016 2:01:00PM	Unknown(#0)	Save changes to a sold Inventory Item record	1	4
	Message: ID/Password failure.				
	10/10/2016 4:17:00PM	Gem, Nancy(#10)	Administer Vendors	1	2
	10/13/2016 12:08:00PM	Gem, Nancy(#10)	Administer Vendors	1	2
	10/18/2016 11:58:00AM	Gem, Nancy(#10)	Administer Vendors	1	2
	10/18/2016 11:59:00AM	Gem, Nancy(#10)	Administer Vendors	1	2
	10/18/2016 11:59:00AM	Gem, Nancy(#10)	Administer Vendors	1	2
	10/21/2016 2:15:00PM	Gem, Nancy(#10)	Administer Vendors	1	2
	10/24/2016 5:00:00PM	Gem, Nancy(#10)	Administer Vendors	1	2
	10/25/2016 12:26:00PM	Gem, Nancy(#10)	Administer Vendors	1	4
	10/4/2016 11:57:00AM	Gem, Nancy(#10)	Administer Vendors	1	2
	10/6/2016 4:06:00PM	Gem, Nancy(#10)	Administer Vendors	1	2
	10/6/2016 4:06:00PM	Gem, Nancy(#10)	Administer Vendors	1	2
	10/8/2016 12:59:00PM	Gem, Nancy(#10)	Administer Vendors	1	2

Data fields in the **Security Log** report include:

Fail Status	Indicates that a login attempt failed. The details are shown in the **Permission** field.
When	Date of the event.
Who	The associate involved in the event.
Permission	Activity that triggered the event.
Store	The store in which the event took place.
Station	The station at which the event took place.

7.6.7 Care Plan Report

The **Care Plan** report lists care plans sold, the items associated with them, and their status.



Care Plan Report
Sort By:Care Plan Date Sold;

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Customer Name	Sale ID	Date Sold	WhoSold	Care Plan Name	Term	Status	Retail	Cost
Kyle Bowstring	001-126429	8/14/17	#1: Owner, Tom	Montage: 1 Year Jewelry Care Watch Protection Plan for $34.99 on Item # 505-01446	1 Years	Active	$34.99	
Sheila Smith	001-126433	9/7/17	#1: Owner, Tom	Montage: 3 Year Jewelry Care Protection Plan for $579.99 on Item # 100-05083	3 Years	Active	$579.99	
Sheila Smith	001-126434	9/7/17	#1: Owner, Tom	Montage: 1 Year Jewelry Care Watch Protection Plan for $34.99 on Item # 500-01130	1 Years	Active	$34.99	
					Grand Totals	#3	$649.97	

Fields and option in the **Care Plan** report include:

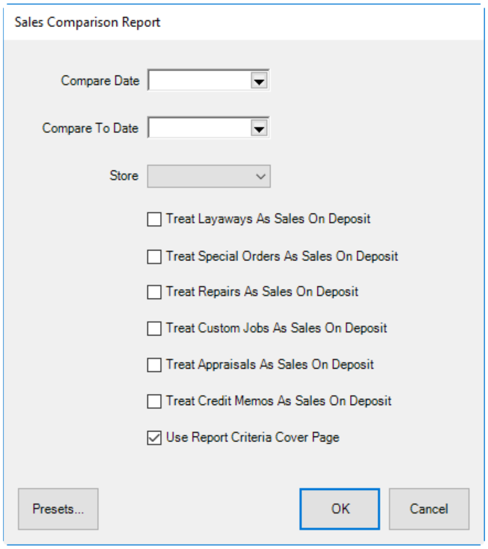
Customer Name	The customer name.
Sale ID	The transaction ID for the sale.
Date Sold	The date the item and care plan were sold.
Who Sold	The associate who conducted the transaction.
Care Plan Name	The name of the plan that was sold.
Term	The length of the plan.
Status	The status of the plan, i.e., whether the plan is still in effect.
Retail	The price paid for the plan.
Cost	The cost to the merchant for the plan.

Care plan data will appear in **Daily Activity** reports as well, under **Misc** and marked with a **W**.

Be sure to match this data with your billing statement from your care plan provider.

7.6.8 Sales Comparison Report

The **Sales Comparison** report provides sales data by day, week, month, and year for a given date compared with the same time periods for the year before.



Sales Comparison Report

Compare Date

Compare To Date

Store

☐ Treat Layaways As Sales On Deposit

☐ Treat Special Orders As Sales On Deposit

☐ Treat Repairs As Sales On Deposit

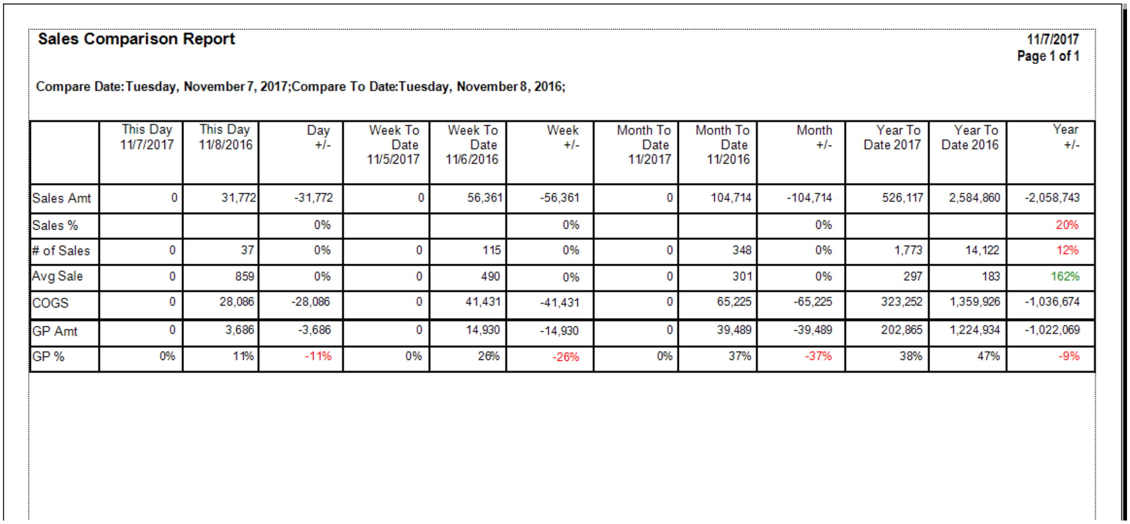
☐ Treat Custom Jobs As Sales On Deposit

☐ Treat Appraisals As Sales On Deposit

☐ Treat Credit Memos As Sales On Deposit

☑ Use Report Criteria Cover Page

To see this week's sales compared with the same week last year, just enter today's date in the **Compare Date** field. To see an earlier year's data, enter the date of the year after it in the **Compare Date** field. For example, if today is 1/1/2017 and you want to see data from 2015, enter 1/1/2016. Optionally, use **Compare To Date** to select a different date with which to compare the **Compare Date**. Note that improvements are shown in green and deficiencies are shown in red.



Sales Comparison Report

11/7/2017
Page 1 of 1

Compare Date:Tuesday, November 7, 2017;Compare To Date:Tuesday, November 8, 2016;

	This Day 11/7/2017	This Day 11/8/2016	Day +/-	Week To Date 11/5/2017	Week To Date 11/6/2016	Week +/-	Month To Date 11/2017	Month To Date 11/2016	Month +/-	Year To Date 2017	Year To Date 2016	Year +/-
Sales Amt	0	31,772	-31,772	0	56,361	-56,361	0	104,714	-104,714	526,117	2,584,860	-2,058,743
Sales %			0%			0%			0%			20%
# of Sales	0	37	0%	0	115	0%	0	348	0%	1,773	14,122	12%
Avg Sale	0	859	0%	0	490	0%	0	301	0%	297	183	162%
COGS	0	28,086	-28,086	0	41,431	-41,431	0	65,225	-65,225	323,252	1,359,926	-1,036,674
GP Amt	0	3,686	-3,686	0	14,930	-14,930	0	39,489	-39,489	202,865	1,224,934	-1,022,069
GP %	0%	11%	-11%	0%	26%	-26%	0%	37%	-37%	38%	47%	-9%

Data fields in the **Sales Comparison** report include:

This Day [entered year]	Total sales amount, percentage of sales difference from the beginning date to end date, number of sales, average sale amount, and cost of goods sold for the date you entered. It also shows the total gross profit on this day and the percentage of gross profit.
This Day [previous year]	The same as above but for the previous year.
Day +/-	The difference in the values above for the period in the entered year compared with the period from the previous year.
Week to Date [entered year]	Total sales amount, percentage of sales difference from the beginning date to end date, number of sales, average sale amount, and cost of goods sold for the week of the date entered. It also shows the total gross profit for this week and the percentage of gross profit.
Week to Date [previous year]	The same as above but for the previous year.
Week +/-	The difference in the values above for the period in the entered year compared with the period from the previous year.
Month to Date [entered year]	Total sales amount, percentage of sales difference from the beginning date to end date, number of sales, average sale amount, and cost of goods sold for the month of the date entered. It also shows the total gross profit for this month and the percentage of gross profit.
Month to Date [previous year]	The same as above but for the previous year.
Month +/-	The difference in the values above for the period in the entered year compared with the period from the previous year.
Year to Date [entered year]	Total sales amount, percentage of sales difference from the beginning date to end date, number of sales, average sale amount, and cost of goods sold for the year of the date entered. It also shows the total gross profit for this year and the percentage of gross profit.
Year to Date [previous year]	The same as above but for the previous year.
Year +/-	The difference in the values above for the period in the entered year compared with the period from the previous year.

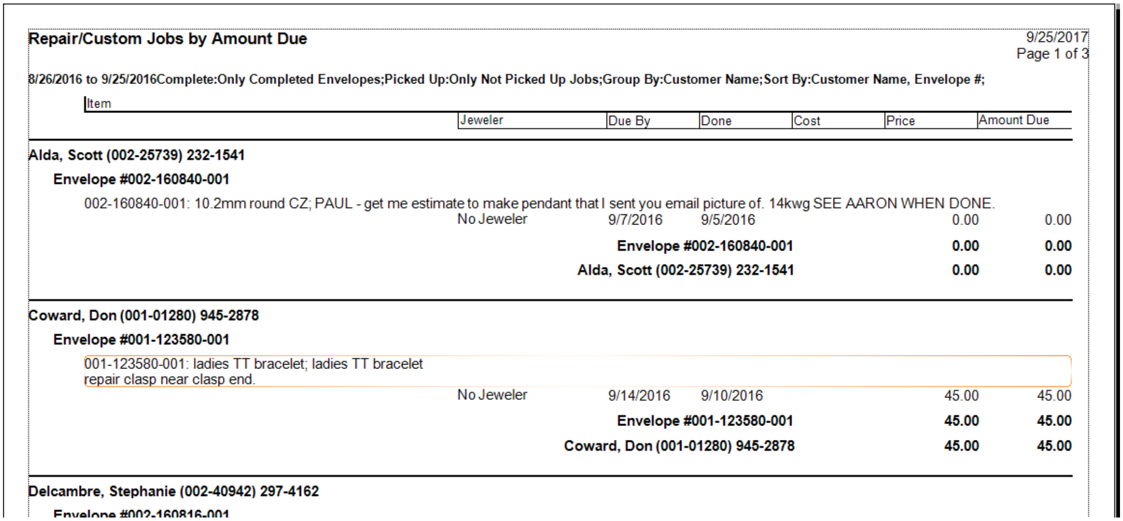
For all of the quantity values, you can click on the value and the detail that made up that number will appear.

7.7 Job Reports

To help track repair activities, The Edge offers a variety of repair and custom job reports. The query windows for these reports are similar to that of finding a repair. See the section entitled Finding and Editing a Job Record for more information. For more about report filters and settings, see the section entitled Creating a Report.

7.7.1 Amount Due Report

The **Amount Due** report lists repairs with an emphasis on amount due for completed repairs. This is very useful for making reminder calls.



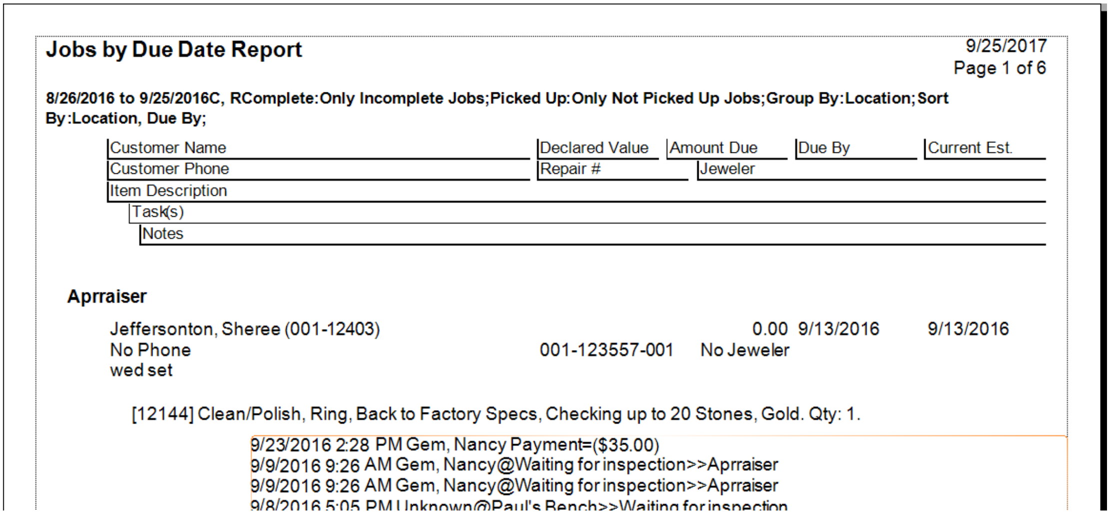
```
Repair/Custom Jobs by Amount Due                                                                    9/25/2017
                                                                                                  Page 1 of 3
8/26/2016 to 9/25/2016Complete:Only Completed Envelopes;Picked Up:Only Not Picked Up Jobs;Group By:Customer Name;Sort By:Customer Name, Envelope #;
     Item
                                        Jeweler        Due By     Done       Cost       Price      Amount Due

Alda, Scott (002-25739) 232-1541
   Envelope #002-160840-001
     002-160840-001: 10.2mm round CZ; PAUL - get me estimate to make pendant that I sent you email picture of. 14kwg SEE AARON WHEN DONE.
                                        No Jeweler     9/7/2016   9/5/2016              0.00       0.00
                                                   Envelope #002-160840-001             0.00       0.00
                                               Alda, Scott (002-25739) 232-1541         0.00       0.00

Coward, Don (001-01280) 945-2878
   Envelope #001-123580-001
     001-123580-001: ladies TT bracelet; ladies TT bracelet
     repair clasp near clasp end.
                                        No Jeweler     9/14/2016  9/10/2016             45.00      45.00
                                                   Envelope #001-123580-001             45.00      45.00
                                             Coward, Don (001-01280) 945-2878           45.00      45.00

Delcambre, Stephanie (002-40942) 297-4162
   Envelope #002-160816-001
```

Data fields in the **Amount Due** report include:

Customer	Customer name, ID, and phone number.
Envelope Number	The number on the envelope containing the repair item.
Item	The item number and description.
Jeweler	If a jeweler is being used, his or her name and ID.
Due By	When the customer is expecting the item returned.
Done	When the repair was completed.
Cost	The cost of the repair to the store.
Price	The price of the repair to the customer.
Amount Due	The amount due on the repair.

7.7.2 Due Date Detailed Report

The **Due Date Detailed** report lists repairs with an emphasis on due dates for incomplete repairs. This is useful for following up with jewelers or outside vendors.



Jobs by Due Date Report

9/25/2017
Page 1 of 6

8/26/2016 to 9/25/2016C, RComplete:Only Incomplete Jobs;Picked Up:Only Not Picked Up Jobs;Group By:Location;Sort By:Location, Due By;

Customer Name | Declared Value | Amount Due | Due By | Current Est.
Customer Phone | Repair # | Jeweler
Item Description
Task(s)
Notes

Aprraiser

Jeffersonton, Sheree (001-12403) 0.00 9/13/2016 9/13/2016
No Phone 001-123557-001 No Jeweler
wed set

[12144] Clean/Polish, Ring, Back to Factory Specs, Checking up to 20 Stones, Gold. Qty: 1.

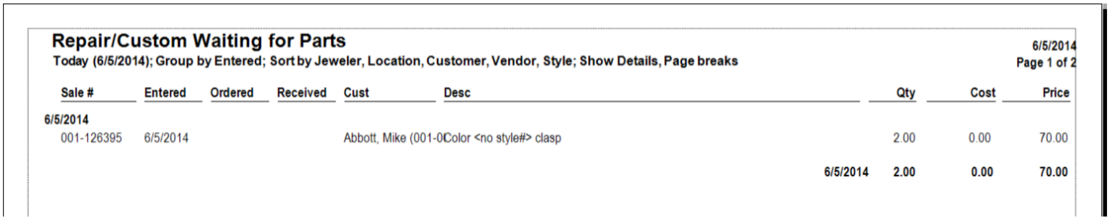
9/23/2016 2:28 PM Gem, Nancy Payment=($35.00)
9/9/2016 9:26 AM Gem, Nancy@Waiting for inspection>>Aprraiser
9/9/2016 9:26 AM Gem, Nancy@Waiting for inspection>>Aprraiser
9/8/2016 5:05 PM Unknown@Paul's Bench>>Waiting for inspection

Data fields in the **Due Date** report include:

Customer Name	Customer's name.
Customer Phone	Customer's phone number.
Item Description	A description of the item being repaired.
Tasks	A list of repairs to be made.
Notes	Any notes that might be useful in making the repair.
Declared Value	The estimated value of the item.
Amount Due	The amount due from the customer on the price of the repair.
Due By	When the repair is expected by the customer.
Current Estimate	When the repair is expected to be complete.
Jeweler	If applicable, the name and ID of the assigned jeweler.
Station	The station number of the in-house jeweler.

7.7.3 Waiting for Parts Report

The **Waiting Parts** report lists repairs that are awaiting parts to be completed.



Repair/Custom Waiting for Parts

Today (6/5/2014); Group by Entered; Sort by Jeweler, Location, Customer, Vendor, Style; Show Details, Page breaks

6/5/2014
Page 1 of 2

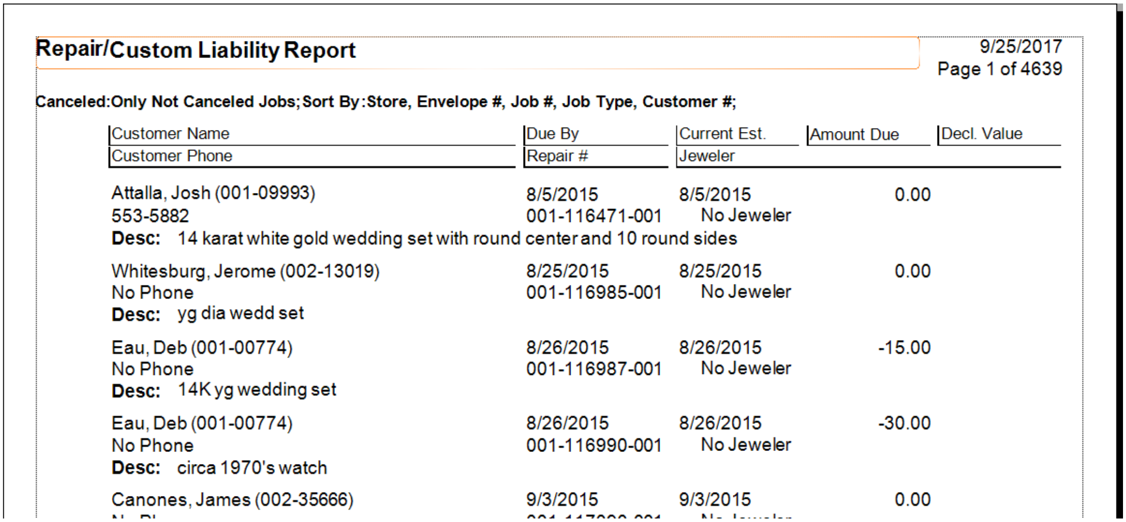
Sale #	Entered	Ordered	Received	Cust	Desc	Qty	Cost	Price
6/5/2014								
001-126395	6/5/2014			Abbott, Mike (001-0	Color <no style#> clasp	2.00	0.00	70.00
					6/5/2014	2.00	0.00	70.00

Data fields in the **Waiting Parts** report include:

Sale #	The transaction number of the repair.
Entered	Date the repair was entered.
Ordered	Date the part was ordered.
Received	Date the part was received.
Cust	The customer's name.
Desc	A description of the part.
Qty	The number of parts ordered.
Cost	The cost of the part.
Price	The price of the part to the customer.

7.7.4 Repair/Custom Liability Report

The **Repair/Custom Liability** report lists all customer goods in the store for repair and their declared values.



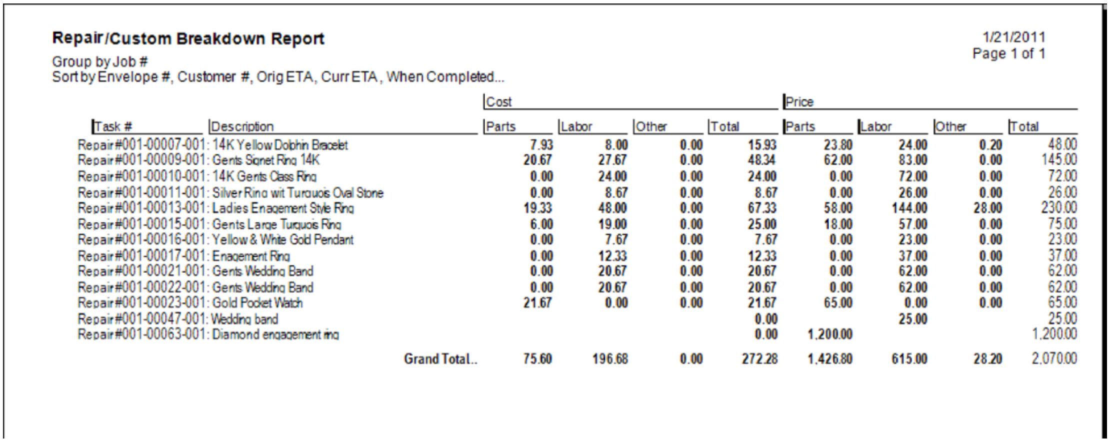
```
Repair/Custom Liability Report                                                        9/25/2017
                                                                                   Page 1 of 4639
Canceled:Only Not Canceled Jobs;Sort By:Store, Envelope #, Job #, Job Type, Customer #;

      Customer Name                       Due By          Current Est.   Amount Due    Decl. Value
      Customer Phone                      Repair #        Jeweler

      Attalla, Josh (001-09993)           8/5/2015        8/5/2015             0.00
      553-5882                            001-116471-001    No Jeweler
      Desc:   14 karat white gold wedding set with round center and 10 round sides

      Whitesburg, Jerome (002-13019)      8/25/2015       8/25/2015            0.00
      No Phone                            001-116985-001    No Jeweler
      Desc:   yg dia wedd set

      Eau, Deb (001-00774)                8/26/2015       8/26/2015          -15.00
      No Phone                            001-116987-001    No Jeweler
      Desc:   14K yg wedding set

      Eau, Deb (001-00774)                8/26/2015       8/26/2015          -30.00
      No Phone                            001-116990-001    No Jeweler
      Desc:   circa 1970's watch

      Canones, James (002-35666)          9/3/2015        9/3/2015             0.00
```

Data fields in the **Liability** report include:

Customer Name	The customer's name.
Customer Phone	The customer's phone number.
Due By	The date by which the customer is expecting the item.
Repair #	The unique identifier for the repair record.
Curr Est	The estimated completion date.
Jeweler	If outsourced, the name of the jeweler making the repair.
Amount Due	The amount due from the customer.
Declared Value	The estimated value of the item.

7.7.5 Breakdown Report

The **Repair Breakdown** report details the cost of parts and labor for repairs. A useful feature of this report is the variety of grouping options available.



Repair/Custom Breakdown Report

Group by Job #
Sort by Envelope #, Customer #, Orig ETA, Curr ETA, When Completed...

1/21/2011
Page 1 of 1

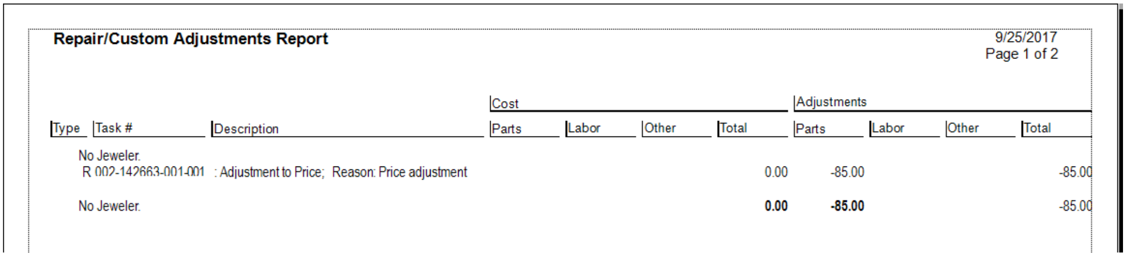
		Cost				Price			
Task #	Description	Parts	Labor	Other	Total	Parts	Labor	Other	Total
Repair#001-00007-001:	14K Yellow Dolphin Bracelet	7.93	8.00	0.00	15.93	23.80	24.00	0.20	48.00
Repair#001-00009-001:	Gents Signet Ring 14K	20.67	27.67	0.00	48.34	62.00	83.00	0.00	145.00
Repair#001-00010-001:	14K Gents Class Ring	0.00	24.00	0.00	24.00	0.00	72.00	0.00	72.00
Repair#001-00011-001:	Silver Ring wit Turquois Oval Stone	0.00	8.67	0.00	8.67	0.00	26.00	0.00	26.00
Repair#001-00013-001:	Ladies Engagement Style Ring	19.33	48.00	0.00	67.33	58.00	144.00	28.00	230.00
Repair#001-00015-001:	Gents Large Turquois Ring	6.00	19.00	0.00	25.00	18.00	57.00	0.00	75.00
Repair#001-00016-001:	Yellow & White Gold Pendant	0.00	7.67	0.00	7.67	0.00	23.00	0.00	23.00
Repair#001-00017-001:	Engagement Ring	0.00	12.33	0.00	12.33	0.00	37.00	0.00	37.00
Repair#001-00021-001:	Gents Wedding Band	0.00	20.67	0.00	20.67	0.00	62.00	0.00	62.00
Repair#001-00022-001:	Gents Wedding Band	0.00	20.67	0.00	20.67	0.00	62.00	0.00	62.00
Repair#001-00023-001:	Gold Pocket Watch	21.67	0.00	0.00	21.67	65.00	0.00	0.00	65.00
Repair#001-00047-001:	Wedding band				0.00		25.00		25.00
Repair#001-00063-001:	Diamond engagement ring				0.00	1,200.00			1,200.00
	Grand Total..	75.60	196.68	0.00	272.28	1,426.80	615.00	28.20	2,070.00

Data fields in the **Repair Breakdown** report include:

Task #	The task within a repair to be detailed.
Description	A description of the task.
Cost Parts	The cost of parts to the store.
Cost Labor	The cost of labor to the store.
Cost Other	Other costs of the repair to the store.
Cost Total	The total cost of the repair.
Price Parts	The price charged to the customer for the parts.
Price Labor	The price charged to the customer for labor.
Price Other	The price charged to the customer for other costs to the store.
Price Total	The total price of the task to the customer.

7.7.6 Adjustments Report

The **Adjustments** report generates a listing of adjustments to repairs and custom jobs.



Repair/Custom Adjustments Report

9/25/2017
Page 1 of 2

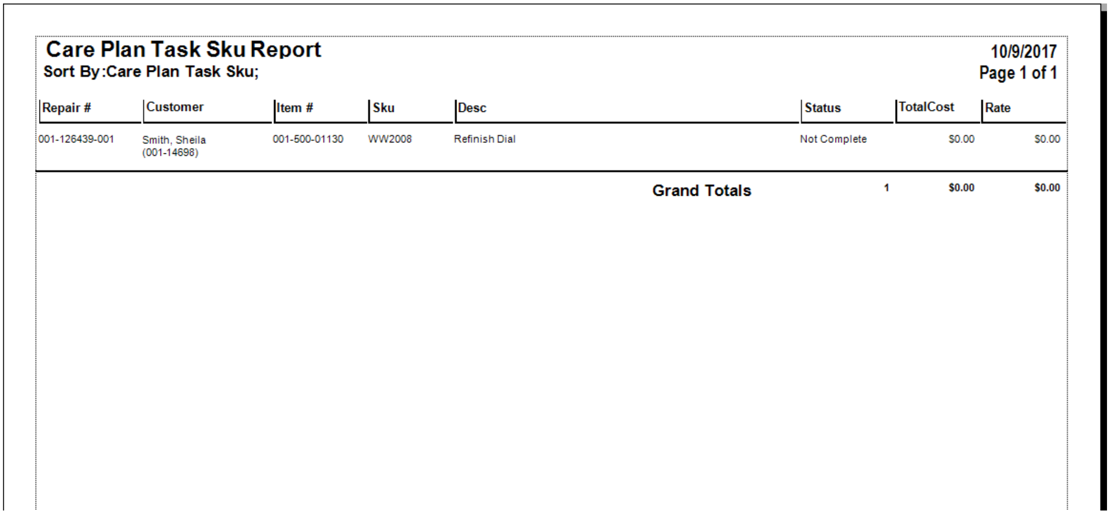
			Cost				Adjustments			
Type	Task #	Description	Parts	Labor	Other	Total	Parts	Labor	Other	Total
No Jeweler.										
R	002-142663-001-001	: Adjustment to Price; Reason: Price adjustment				0.00	-85.00			-85.00
No Jeweler.						**0.00**	**-85.00**			-85.00

Data fields in the **Adjustments** report include:

Type	The type of the task or item being adjusted.
Task #	The ID of the task being adjusted
Description	A description of the adjustment
Cost	The cost of the repair to include parts, labor, and other, and the total cost.
Adjustments	The amount adjusted in any of parts, labor, or other, and the total adjustment.

7.7.7 Care Plan Repair SKU Report

The **Care Plan Repair SKU** report lists repair SKUs used for care plan-covered repairs during the specified time period.



Care Plan Task Sku Report
Sort By :Care Plan Task Sku;

10/9/2017
Page 1 of 1

Repair #	Customer	Item #	Sku	Desc	Status	TotalCost	Rate
001-126439-001	Smith, Sheila (001-14698)	001-500-01130	WW2008	Refinish Dial	Not Complete	$0.00	$0.00
				Grand Totals	1	$0.00	$0.00

Data fields in the **Care Plan Task SKU** report include:

Repair #	The transaction number for the repair.
Customer	The customer name and ID.
Item #	For repairs on items sold by the store, the item number.
SKU	The repair task SKU for the repair.
Desc	A description of the repair.
Status	The status of the repair.
TotalCost	The cost to the store for the repair.
Rate	The amount the care plan company has agreed to pay for the repair.

8 Associate Functions

8.1 Appointments

To help you assign, track, and record calls and appointments with customers, The Edge offers an appointment module. The primary purpose of this module is to allow you and your staff to create tasks that involve making contact with a customer to discuss potential sales, service jobs, and other business-generating conversations. This is not to be confused with clienteling and other broad marketing modules found in The Edge; it is designed to manage specific interaction with the customer for a specific objective.

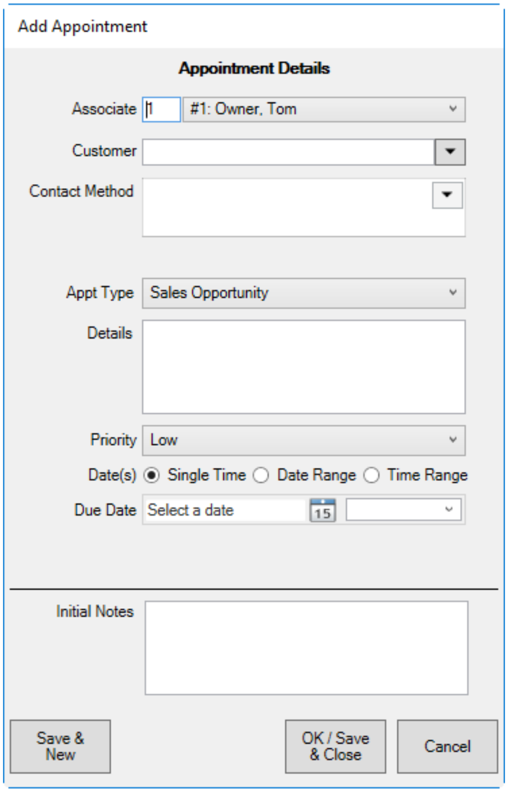
There are three primary functions within the appointment module:

- Add Appointment
- Find and Edit an Appointment
- Bring Up the Next Appointment.

8.1.1 Adding an Appointment

To create a new appointment:

1. Select **Associate ► Appointments ► Add**. The **Add Appointment** window will appear.



Add Appointment

Appointment Details

Associate: 1 | #1: Owner, Tom

Customer:

Contact Method:

Appt Type: Sales Opportunity

Details:

Priority: Low

Date(s): ● Single Time ○ Date Range ○ Time Range

Due Date: Select a date

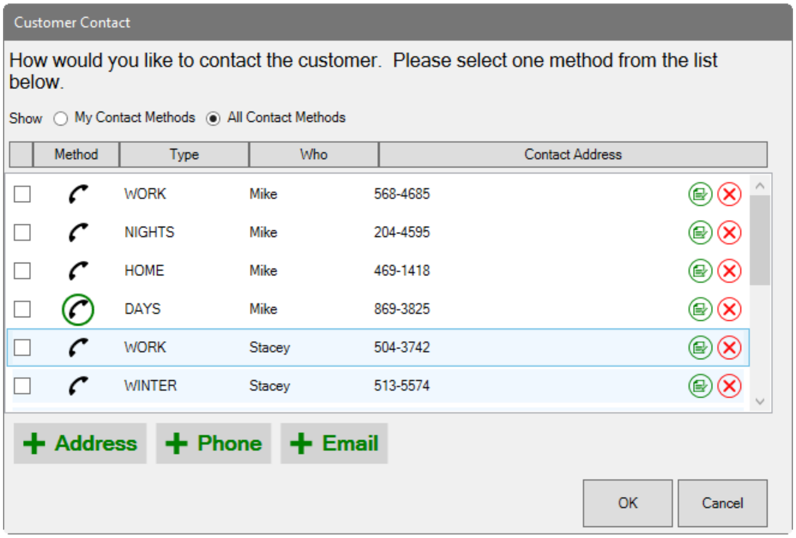
Initial Notes:

Fields and options in the **Add Appointment** window include:

Associate	Offers the **Associate** drop-down menu; use it to assign the task or appointment to an associate.
Customer	Offers the customer find filter to indicate the customer. This is required to proceed with further contact information.
Contact Method	Offers the method of contact options for the selected customer: • `Phone` • `Email` • `In Person`. For each contact type, there may be more than one contact method. Select the correct phone number email address, or store location.
Appointment Type	Allows you to categorize appointments by type: • `Registry` • `Service` • `Wish List` • `Sales Opportunity`.

Details	Allows you to record details about the task. It should be a succinct description of the task as it will appear in the list view.
Priority	Indicates the priority of the contact on a scale of `High`, `Medium`, or `Low`.
Dates	You have the option to enter a specific, single time to fulfill the appointment, enter a date range, or enter a time range on a particular date. The options for entering those details change according which radio button you select: • **Single Time**: Select a date from the date picker and select a time in 30-minute intervals from the drop-down menu. • **Date Range**: **Begin Date** and **End Date** fields will be offered; select accordingly. No time frame is recorded, but The Edge will store the time as 12:00 a.m. • **Time Range**: Begin and end dates will be offered, but you can also pick times.
Initial Notes	Notes concerning the purpose of the contact, information about items or transactions to be discussed, etc. There is space to be detailed here; you can include item numbers, descriptions, etc. This information will not appear in the **History** area of the appointment record.

2. Select an associate.
3. Select a customer.
4. Select the **Contact Method** drop-down menu. The **Customer Contact** window will appear.



Customer Contact

How would you like to contact the customer. Please select one method from the list below.

Show ○ My Contact Methods ● All Contact Methods

	Method	Type	Who	Contact Address
☐	☎	WORK	Mike	568-4685
☐	☎	NIGHTS	Mike	204-4595
☐	☎	HOME	Mike	469-1418
☐	☎	DAYS	Mike	869-3825
☐	☎	WORK	Stacey	504-3742
☐	☎	WINTER	Stacey	513-5574

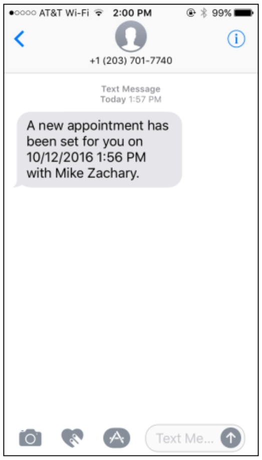
5. Select the type of contact with the desired value from the available options.

6. Select **OK**. You will be returned to the **Add Appointment** window. The **Contact Method** and **Contact Address** will be populated.
7. Complete the remaining fields and select **OK/Save & Close**. The appointment will be saved and the window will close.
8. When you are ready to act on the appointment, find it as described in the section entitled Finding and Editing an Appointment.

8.1.2 Appointment Notifications

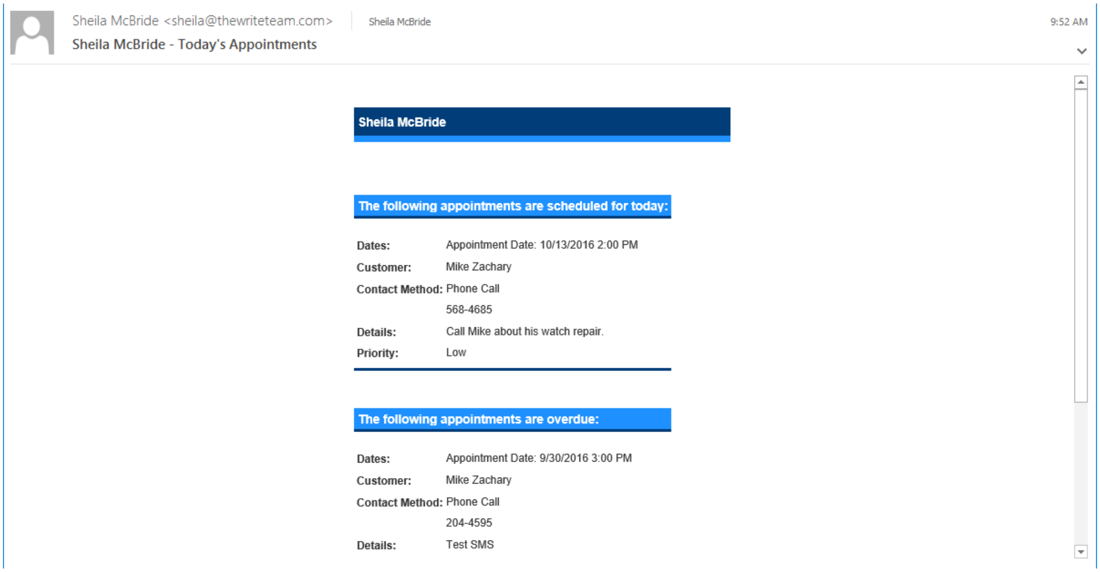
Depending on **System Options** and associate contact information, the associate to whom the appointment is assigned will receive an email or text message informing him or her of the assignment. For example, if you're a manager, you can set appointments for associates. Then, when the appointment is set, an email or text message will be sent to the associate. In addition, a daily email can be sent to associates listing the day's appointments.

Text Message Sample



A new appointment has been set for you on 10/12/2016 1:56 PM with Mike Zachary.

Email Sample



Sheila McBride

The following appointments are scheduled for today:

Dates:	Appointment Date: 10/13/2016 2:00 PM
Customer:	Mike Zachary
Contact Method:	Phone Call 568-4685
Details:	Call Mike about his watch repair.
Priority:	Low

The following appointments are overdue:

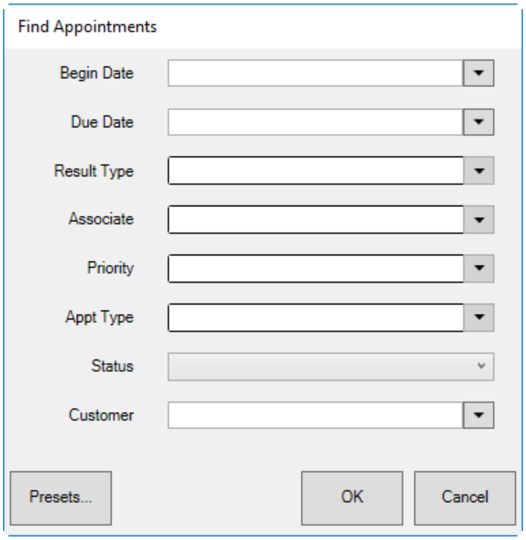
Dates:	Appointment Date: 9/30/2016 3:00 PM
Customer:	Mike Zachary
Contact Method:	Phone Call 204-4595
Details:	Test SMS

For these notifications to work, you must have text messaging and email set up in The Edge. For instructions, see the section entitled Notifications.

8.1.3 Finding and Editing an Appointment

To work with or fulfill and appointment:

1. Select **Associate** ► **Appointments** ► **Find**. The **Find Appointments** window will appear.



Filter options in the **Find Appointments** window include:

Begin Date Returns appointments with the selected begin date.

End Date Returns appointments with the selected end date.

Result Type Returns appointments based on result type:

- `All`
- `Contact Unsuccessful, Try Again Later`
- `Made Contact, Need Follow-Up`
- `Made Sale, Set New Opportunity`
- `Did Not Make Sale, Set New Opportunity`
- `Discontinue`
- `Data Changed`
- `Initial Note.`

Associate Returns appointments assigned to the selected associate. If none are selected, it will default to the currently logged-in associate.

Priority Returns appointment with the selected priority: `High`, `Medium`, or `Low`.

Appointment Type Returns appointments based on type:

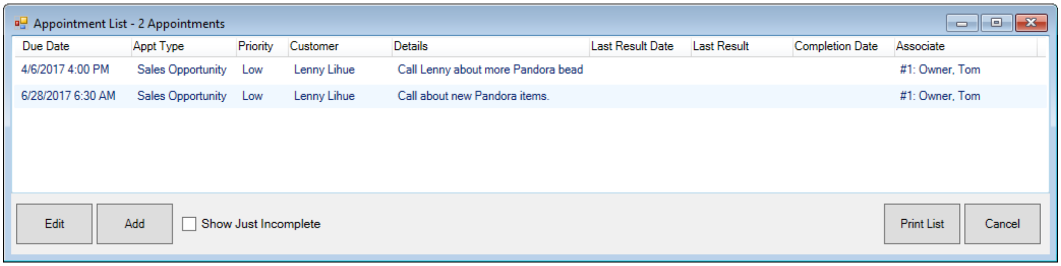
- `Registry`
- `Service`
- `Wish List`

`Sales Opportunity.`

Status Returns appointments with the selected status:

	• `All Appointments` • `Completed Appointments Only` • `Not Completed Appointments Only.`
Customer	Returns appointments with the selected customer.

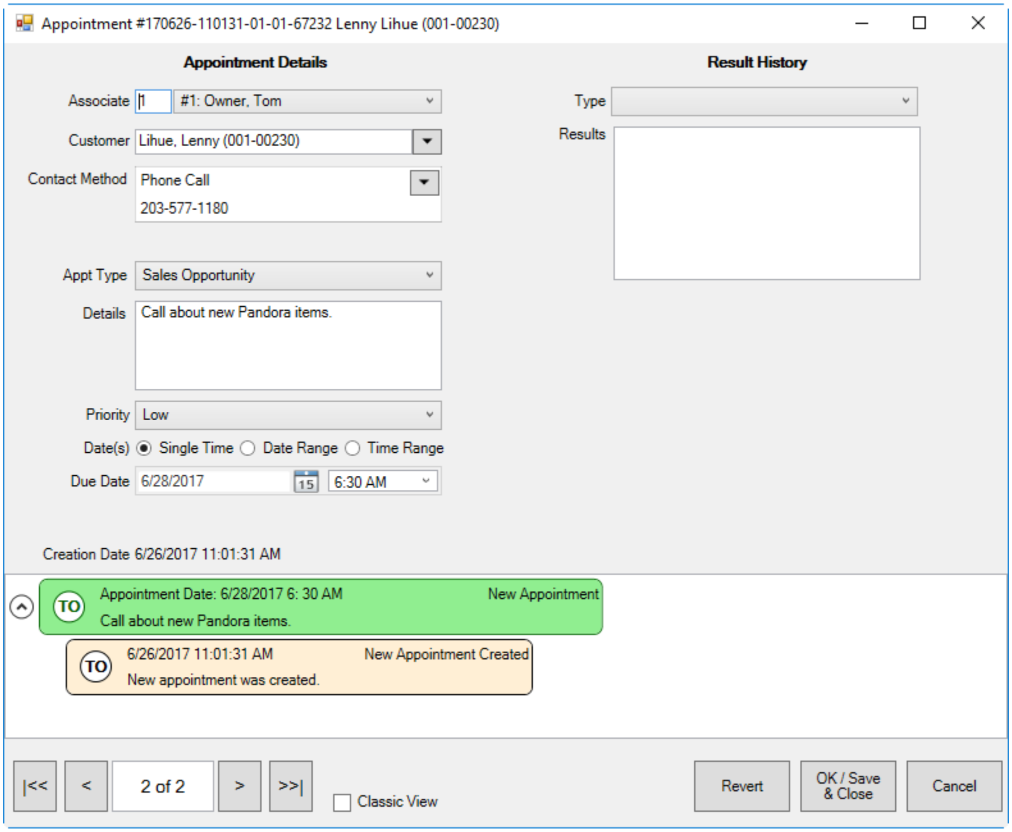
2. Enter values in the filter to narrow results and select **OK**. The **Appointment List** window will appear.



Appointment List - 2 Appointments

Due Date	Appt Type	Priority	Customer	Details	Last Result Date	Last Result	Completion Date	Associate
4/6/2017 4:00 PM	Sales Opportunity	Low	Lenny Lihue	Call Lenny about more Pandora bead				#1: Owner, Tom
6/28/2017 6:30 AM	Sales Opportunity	Low	Lenny Lihue	Call about new Pandora items.				#1: Owner, Tom

3. Select the appointment with which you wish to work and double-click or select **Edit**. The **Edit Appointment** window will open. In addition, the **Customer Edit** window will open for easy reference and to allow you to take notes.



Appointment #170626-110131-01-01-67232 Lenny Lihue (001-00230)

Associate 1 #1: Owner, Tom
Customer Lihue, Lenny (001-00230)
Contact Method Phone Call
203-577-1180
Appt Type Sales Opportunity
Details Call about new Pandora items.
Priority Low
Date(s) ● Single Time ○ Date Range ○ Time Range
Due Date 6/28/2017 6:30 AM

Creation Date 6/26/2017 11:01:31 AM

Appointment Date: 6/28/2017 6: 30 AM New Appointment
Call about new Pandora items.

6/26/2017 11:01:31 AM New Appointment Created
New appointment was created.

The left side of the **Edit Appointment** window contains the data provided when the appointment was created. The right side of the **Edit Appointment** window contains fields for recording activity:

Type The type of result:

- `Contact Unsuccessful, Try Again Later`. You should make notes in the appointment and change the dates as needed.
- `Made Contact, Need Follow-Up`. You should make notes in the appointment. A prompt for the follow up call within the appointment will appear.
- `Made Sale, Set New Opportunity`. The Edge will close the current appointment and prompt you to create a new appointment for the future.
- `Did Not Make Sale, Set New Opportunity`. The Edge will close the current appointment and prompt you to create a new appointment for the future.
- `Discontinue`. The customer doesn't want to be contacted on this opportunity anymore; the chain will come to a close.

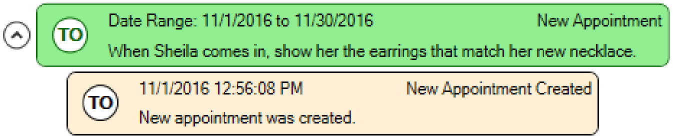
Results	Notes about the success of the appointment and what kind of follow up may be needed as described above.

4. Complete these fields and select a **Save** option. The newly recorded action will appear in the **History** area on the bottom of the window.

8.1.4 Working with Appointment Results

Example 1: Initial Appointment

Here is an initial appointment record in which we want to call a customer and tell her about an item she might want.

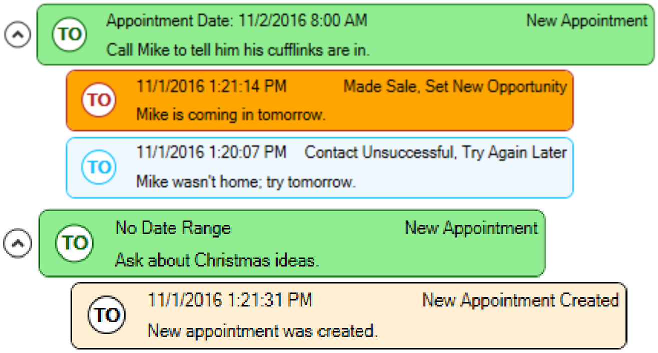


Date Range: 11/1/2016 to 11/30/2016 New Appointment
When Sheila comes in, show her the earrings that match her new necklace.

11/1/2016 12:56:08 PM New Appointment Created
New appointment was created.

Example 2: Completed Appointment with New Opportunity

When the appointment is complete, you can record the results and the appointment will be closed. If the appointment is closed, either successfully or unsuccessfully, you will want to keep the conversation going, so The Edge will prompt you to make a new appointment in a new chain, closing the previous chain.



Appointment Date: 11/2/2016 8:00 AM New Appointment
Call Mike to tell him his cufflinks are in.

11/1/2016 1:21:14 PM Made Sale, Set New Opportunity
Mike is coming in tomorrow.

11/1/2016 1:20:07 PM Contact Unsuccessful, Try Again Later
Mike wasn't home; try tomorrow.

No Date Range New Appointment
Ask about Christmas ideas.

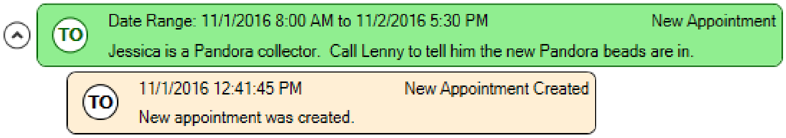
11/1/2016 1:21:31 PM New Appointment Created
New appointment was created.

The **Appointment** list view will show the new appointment and the results of the first.

Example 3: Appointment Requires a Follow-Up Call

Suppose you try to fulfill the appointment, but the person is unavailable or unable to talk at that time. You will want to record your actions and set a follow up time. In the case of a follow-up, the history window will show the next action in the same chain.

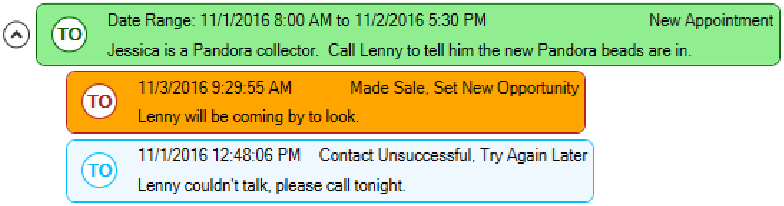
Here is the initial appointment.



TO Date Range: 11/1/2016 8:00 AM to 11/2/2016 5:30 PM New Appointment
Jessica is a Pandora collector. Call Lenny to tell him the new Pandora beads are in.

TO 11/1/2016 12:41:45 PM New Appointment Created
New appointment was created.

Here it is with the follow-up.



TO Date Range: 11/1/2016 8:00 AM to 11/2/2016 5:30 PM New Appointment
Jessica is a Pandora collector. Call Lenny to tell him the new Pandora beads are in.

TO 11/3/2016 9:29:55 AM Made Sale, Set New Opportunity
Lenny will be coming by to look.

TO 11/1/2016 12:48:06 PM Contact Unsuccessful, Try Again Later
Lenny couldn't talk, please call tonight.

Color coding for these actions is as follows:

Green	New opportunity opened by an Edge user
Gold	Closed opportunity with new opportunity opened by The Edge
Cream	System-generated messages pertaining to the opportunity
Light Blue	Recorded actions and next steps.

8.1.5 Working the Next Appointment

When it is time to work the appointment list, use the **Next 50 Open** option to return a list of upcoming appointments in order. The number of next appointments to list can be changed in **System Options**. To obtain the Next 50 Open list:

1. Select **Associate** ► **Appointments** ► **Next 50 Open**. The **Next 50 Appointments** window will appear with the current user's appointment list of up to as many appointments as are set in **System Options**.
2. Select the record for the appointment with which you want to work and select **Edit**.
3. Work the appointment and record the results as described in the section entitled Working with Appointment Results.

8.2 Associate Tasks

The **Associate Tasks** feature allows you to create tasks for your staff to complete. Tasks can be created for specific associates or left open for any associate to complete.

When creating a task, you can choose to have the associate automatically notified via text or email. You can also assign a priority as well as categorize it.

Tasks can be added from the main menu or from other record types. Tasks created from other record types will retain a link to all related records (e.g. item, repair, customer, etc.).

Utilize the **Mass Task Wizard** to easily create tasks based on specific criteria, such as recent customer purchases, service work, and more. And define **Task Automation Rules** to automatically generate tasks when trigger conditions are met.

Tasks are integrated with both the **Store Calendar** and **Dashboards**.

8.2.1 Permissions

By default, an associate can create a task for themselves with no special permissions.

There are four associate permissions related to tasks.

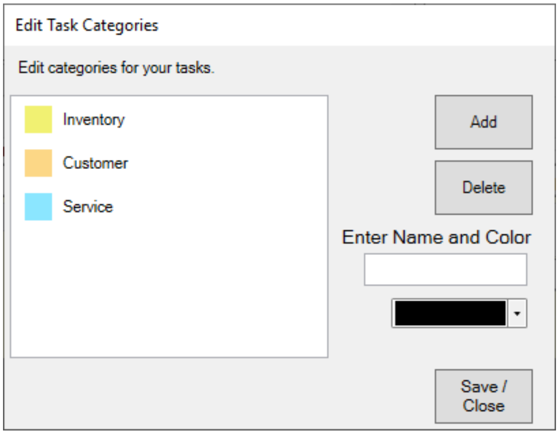
Add a task for someone else	Allows you to create tasks for other associates as well as unassigned tasks that can be completed by anyone.
Add tasks with mass task wizard	Allows you to use the mass task wizard to add and manage batches of tasks.
Delete / Cancel a task with the mass task wizard	Allows you to delete tasks using the mass task wizard. Only tasks originally created with the wizard can be deleted.
Edit a task not assigned to you	Allows you to edit tasks assigned to other associates.

8.2.2 Task Categories

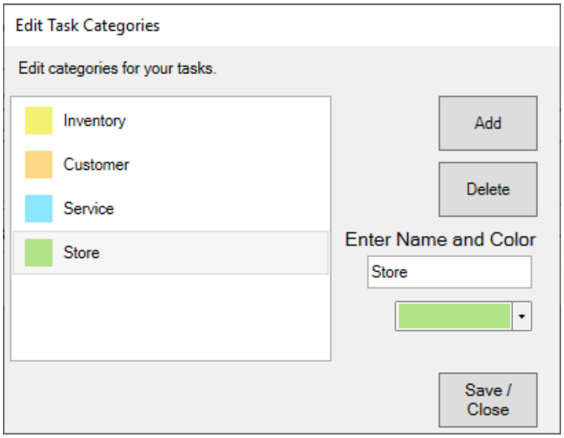
Categories can be setup to organize tasks. To create them:

1. Click **Administrative > Tasks > Categories**. The **Edit Task Categories** window will appear.

2. Click the **Add** button. **New Category** will appear in the list.



3. In the list, click on **New Category**, then enter a **Name** and choose a **Color**.



4. Make desired category changes, then click **Save/Close** to save them.

8.2.3 Adding Tasks

There are five ways to create tasks:

Add Task
Opens task form allowing you to enter task details.

Task Wizard
Starts wizard that walks you through process of adding a single task.

Mass Task Wizard
Starts wizard that allows you to create and manage many tasks at once.

From Other Records

Tasks can be added from customers, items, and service jobs (repairs, custom jobs, special orders, and appraisals). They will retain a link to all related records.

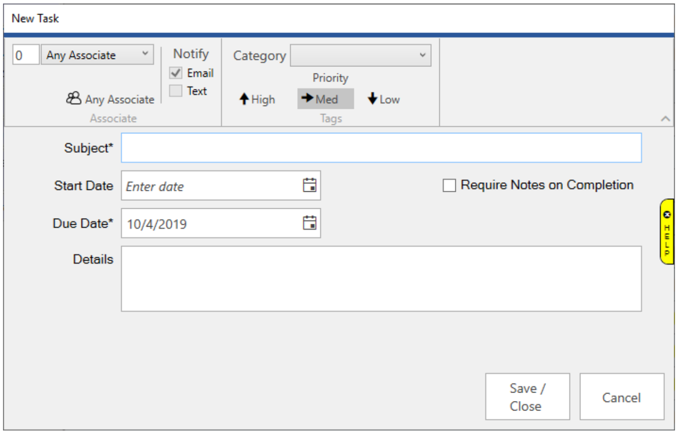
Task Automation Rules

Define rules that will automatically generate tasks when trigger conditions are met.

8.2.3.1 Add Task

This form allows you to add a single task. To use it:

1. Click **Associate** > **Tasks** > **Add**. The **New Task** window will appear.



New Task

0 Any Associate

Notify: ☑ Email ☐ Text

Category:

Priority: High **Med** Low

Subject*:

Start Date: Enter date

☐ Require Notes on Completion

Due Date*: 10/4/2019

Details:

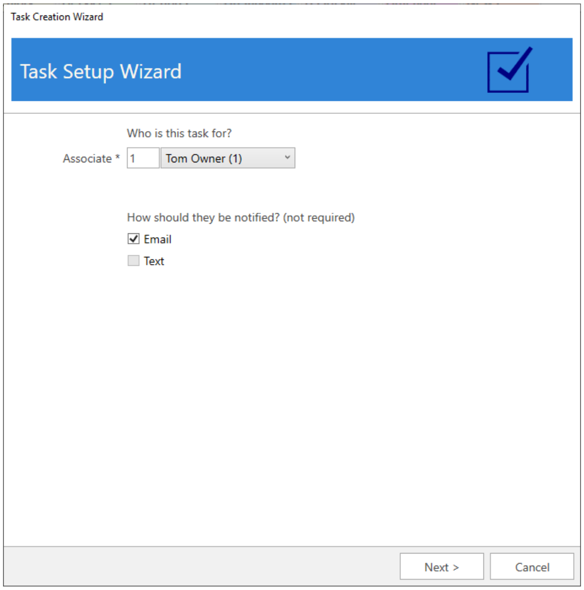
2. On the top left, choose the associate. Tasks created for **0 – Any Associate** can be completed by anyone.
3. Optionally, use the **Notify** setting to choose whether a notification should be automatically sent to the associate via email, text, or both.
4. Optionally, use the **Category** drop-down to select what type of task this is.
5. Optionally, choose the **Priority** level for this task. The default is **Medium**.
6. Optionally, choose a **Start Date**.
7. Enter a **Subject** and **Due Date**. These are the only two required fields.
8. Click **Save/Close** to save your task.

To create a single task that can be completed by multiple associates you must use the **Task Wizard** and check the **Selected Associate(s) Can Complete** option when choosing associates.

8.2.3.2 *Task Wizard*

The **Task Wizard** steps you through the process of adding a single task. To use it:

1. Click **Associate** > **Tasks** > **Task Wizard**. The **Task Creation Wizard** will appear.



Task Creation Wizard

Task Setup Wizard

Who is this task for?

Associate * 1 Tom Owner (1)

How should they be notified? (not required)

☑ Email

☐ Text

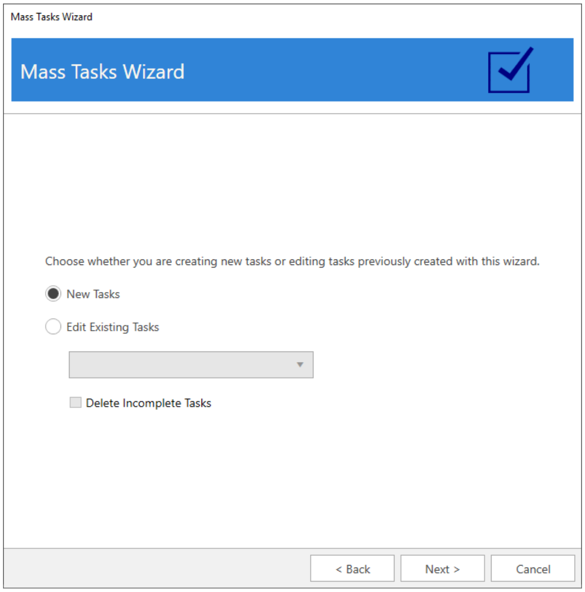
2. Follow the onscreen prompts and use the **Next** button to advance through the wizard.
3. When completed, click the **Finish** button.

8.2.3.3 *Mass Task Wizard*

The **Mass Task Wizard** allows you to create many tasks at once. It can be used to create recurring tasks and has the capability to link tasks to customers, items, and service jobs. Tasks previously created with this wizard can also be updated or deleted en masse.

To use the wizard to create new tasks:

1. Click **Associate** > **Tasks** > **Mass Task Wizard.** The **Mass Tasks Wizard** will appear.



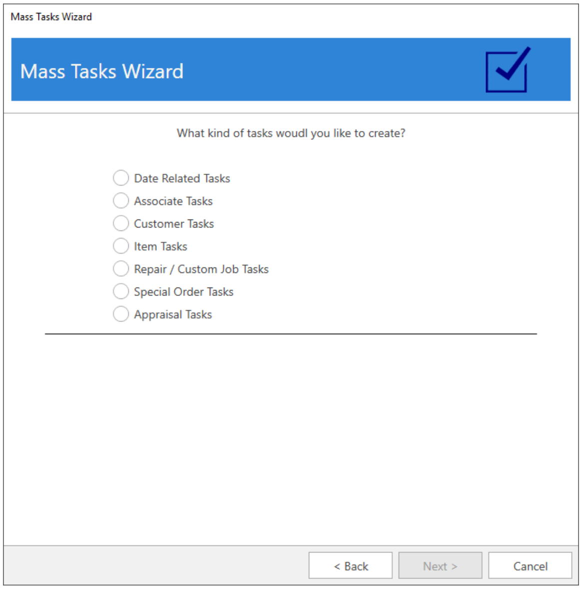
Choose whether you are creating new tasks or editing tasks previously created with this wizard.

● New Tasks

○ Edit Existing Tasks

☐ Delete Incomplete Tasks

2. Select **New Tasks** and click **Next**.



What kind of tasks woudl you like to create?

○ Date Related Tasks
○ Associate Tasks
○ Customer Tasks
○ Item Tasks
○ Repair / Custom Job Tasks
○ Special Order Tasks
○ Appraisal Tasks

3. There are seven types of tasks that can be created:

Date Related Tasks	Create tasks that repeat on a set schedule, i.e. **Daily**, **Weekly**, or **Monthly**. Weekly tasks allow you to select specific days. Monthly

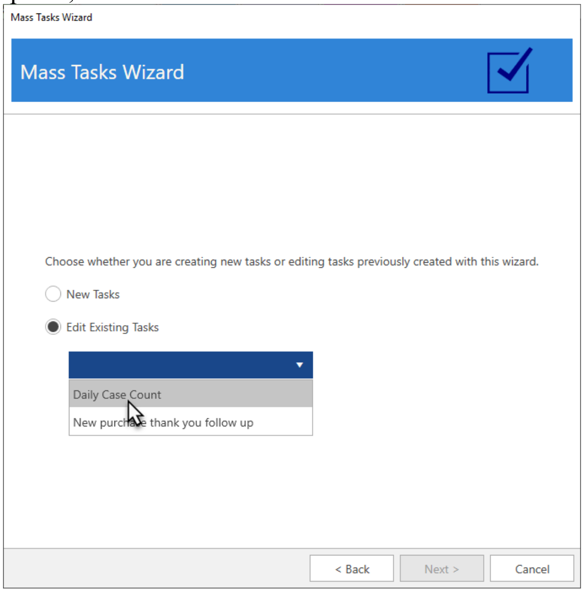
	tasks allow you to repeat on a specific date (e.g. the 10th), the first day, or the last day of the month.
Associate Tasks	Create tasks for multiple associates at once.
Customer Tasks	Displays the **Customer Filter** allowing you to enter criteria to select customers. Results are displayed when you click **Next** and you can choose one or more customers to create and link tasks to.
Item Tasks	Displays the **Item Filter** allowing you to enter criteria to select items. Results are displayed when you click **Next** and you can choose one or more items to create and link tasks to.
Repair / Custom Job Tasks	Displays the **Job Filter** allowing you to enter criteria to select repair or custom jobs. Results are displayed when you click **Next** and you can choose one or more jobs to create and link tasks to.
Special Order Tasks	Displays the **Special Order Filter** allowing you to enter criteria to select special orders. Results are displayed when you click **Next** and you can choose one or more special orders to create and link tasks to.
Appraisal Tasks	Displays the **Appraisal Filter** allowing you to enter criteria to select appraisals. Results are displayed when you click **Next** and you can choose one or more appraisals to create and link tasks to.

4. Select the desired type of task, fill out any required fields (e.g. dates or filters), and click **Next**.
    a. Date tasks will bring you directly to **Task Details**.
    b. For tasks that utilize a filter, the matching records will be displayed. You must select one or more records before proceeding to **Task Details**.
5. **Task Details** required fields vary by type and are noted on screen with an asterisk.
6. Enter details, then click **Next** and **Finish** to create the tasks.

To use this wizard to update previously created tasks:

1. Click **Associate > Tasks > Mass Task Wizard.**

2. Select **Edit Existing Tasks** and use the drop-down to select the group of tasks you wish to update, then click **Next**.



Choose whether you are creating new tasks or editing tasks previously created with this wizard.

○ New Tasks

● Edit Existing Tasks

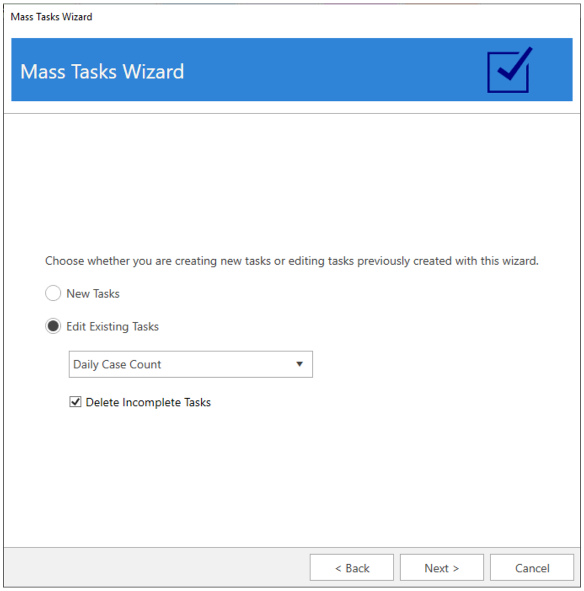
Daily Case Count
New purchase thank you follow up

3. **Task Details** will be displayed. Make any desired changes, then click **Next** and **Finish** to update existing incomplete tasks. Note that completed tasks will not be changed.

To use this wizard to delete tasks:

1. Click **Associate** > **Tasks** > **Mass Task Wizard**.

2. Select **Edit Existing Tasks**, use the drop-down to select the group of tasks you wish to delete, and check **Delete Incomplete Tasks.**



Mass Tasks Wizard

Mass Tasks Wizard

Choose whether you are creating new tasks or editing tasks previously created with this wizard.

○ New Tasks

● Edit Existing Tasks

Daily Case Count ▾

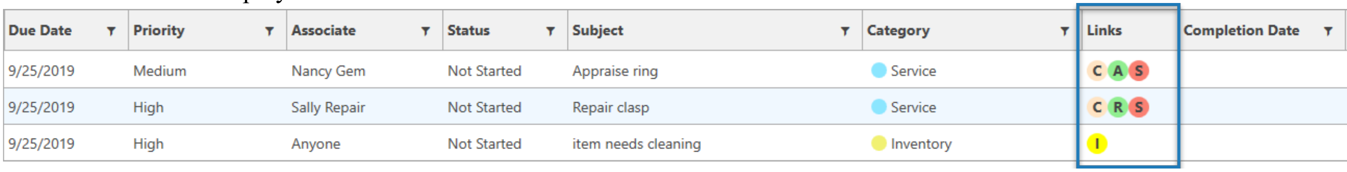
☑ Delete Incomplete Tasks

3. Click **Next** and **Finish** to delete the tasks. Note that any task marked **Complete** will not be deleted.

8.2.3.4 *From Other Records*

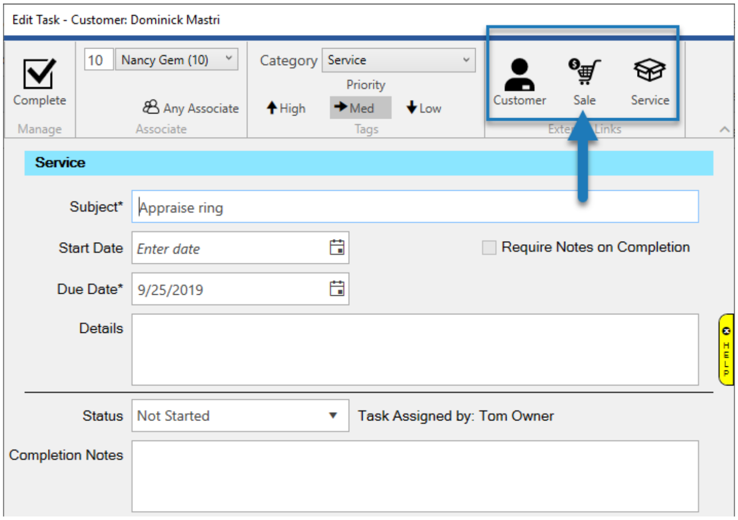
Tasks can be added from customer, item, and service job (repairs, custom jobs, special orders, and appraisals) records. They will retain a link to all related records including any applicable sales receipts.

These links will be displayed in the task list view.



Due Date	Priority	Associate	Status	Subject	Category	Links	Completion Date
9/25/2019	Medium	Nancy Gem	Not Started	Appraise ring	● Service	C A S	
9/25/2019	High	Sally Repair	Not Started	Repair clasp	● Service	C R S	
9/25/2019	High	Anyone	Not Started	item needs cleaning	● Inventory	I	

On the task record, the links will appear as icons in the top right. Clicking on the icon will bring up the corresponding record.



Edit Task - Customer: Dominick Mastri

10 Nancy Gem (10)

Category Service

Priority Med

Service

Subject* Appraise ring

Start Date Enter date

☐ Require Notes on Completion

Due Date* 9/25/2019

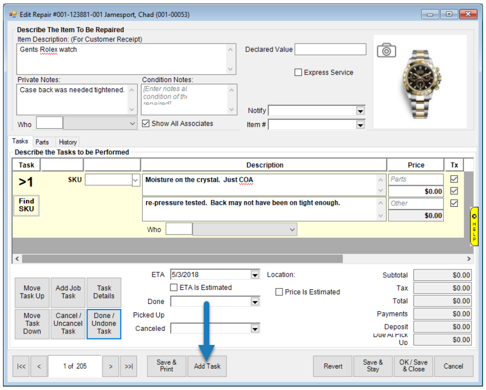
Details

Status Not Started

Task Assigned by: Tom Owner

Completion Notes

Each record type now has an **Add Task** button at the bottom.



Edit Repair #001-123881-001 Jamesport, Chad (001-00053)

Describe The Item To Be Repaired

Item Description: (For Customer Receipt) Gents Rolex watch

Declared Value

☐ Express Service

Private Notes: Case back was needed tightened.

Condition Notes: [Enter notes about condition of the repaired]

Who

☑ Show All Associates

Notify

Item #

Tasks Parts History

Describe the Tasks to be Performed

Task			Description	Price	Tx
>1	SKU		Moisture on the crystal. Just COA	Parts $0.00	☑ ☑
			re-pressure tested. Back may not have been on tight enough.	Other $0.00	☑

ETA 5/3/2018

☐ ETA Is Estimated

Done

Picked Up

Canceled

Location:

☐ Price Is Estimated

Subtotal $0.00

Tax $0.00

Total $0.00

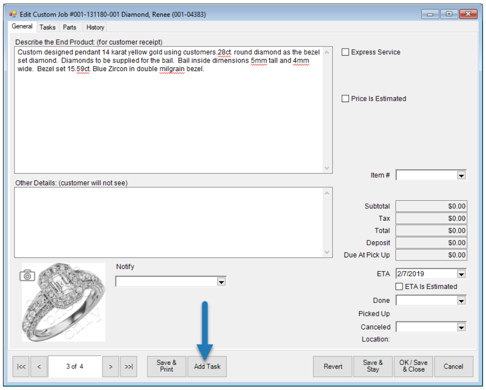
Payments $0.00

Deposit $0.00

Due At Pick Up $0.00

1 of 205

Repair



Edit Custom Job #001-131180-001 Diamond, Renee (001-04383)

Describe the End Product: (for customer receipt)

Custom designed pendant 14 karat yellow gold using customers.28ct. round diamond as the bezel set diamond. Diamonds to be supplied for the bail. Bail inside dimensions 5mm tall and 4mm wide. Bezel set 15.59ct. Blue Zircon in double milgrain bezel.

☐ Express Service

☐ Price Is Estimated

Item #

Other Details: (customer will not see)

Subtotal $0.00

Tax $0.00

Total $0.00

Deposit $0.00

Due At Pick Up $0.00

Notify

ETA 2/7/2019

☐ ETA Is Estimated

Done

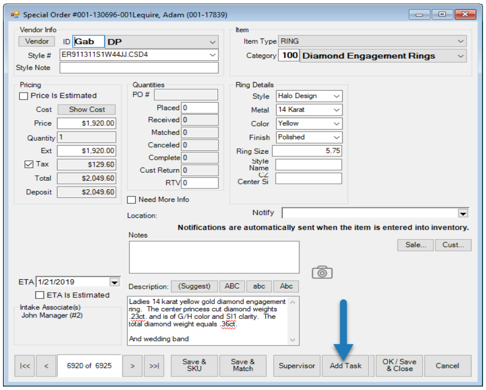
Picked Up

Canceled

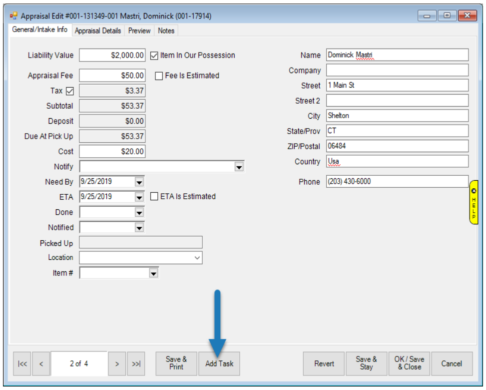
Location:

3 of 4

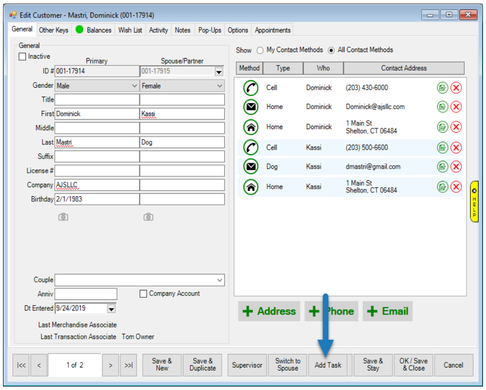
Custom Job



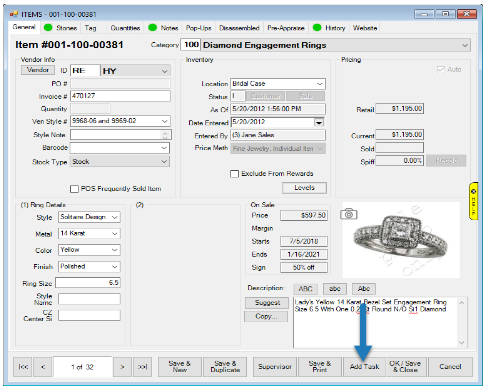
Special Order



Appraisal



Customer



Item

8.2.3.5 Task Automation Rules

Task Automation Rules give you the ability to create rules that will automatically generate tasks when trigger conditions are met. This allows you to create task workflows.

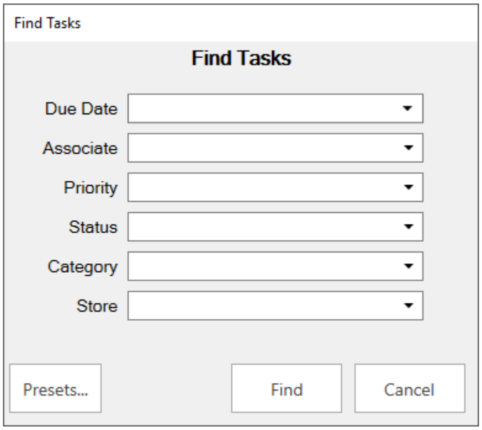
See section 13.13 Task Automation Rules

8.2.4 Working with Tasks

8.2.4.1 Find / Edit

Find Tasks allows you to look up, edit, and complete tasks. To use it:

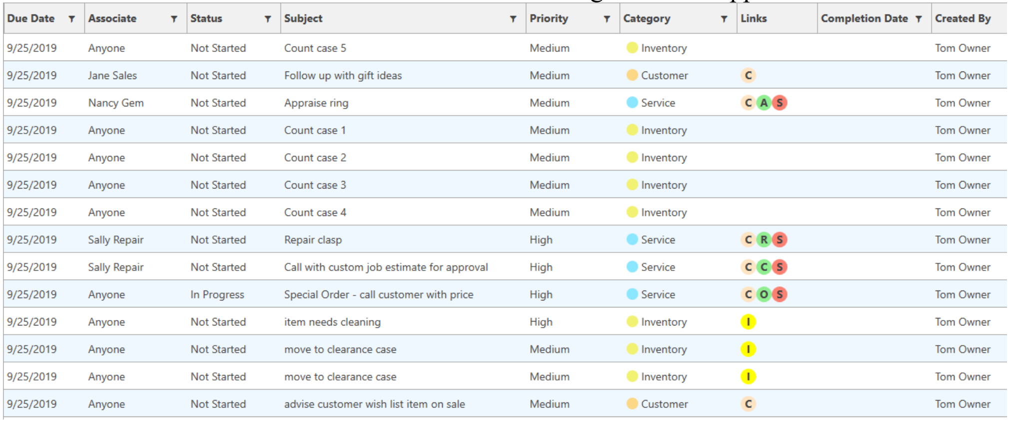
1. Click **Associate** > **Tasks** > **Find**. The **Find Tasks** window will appear.



2. You can filter by the following criteria:

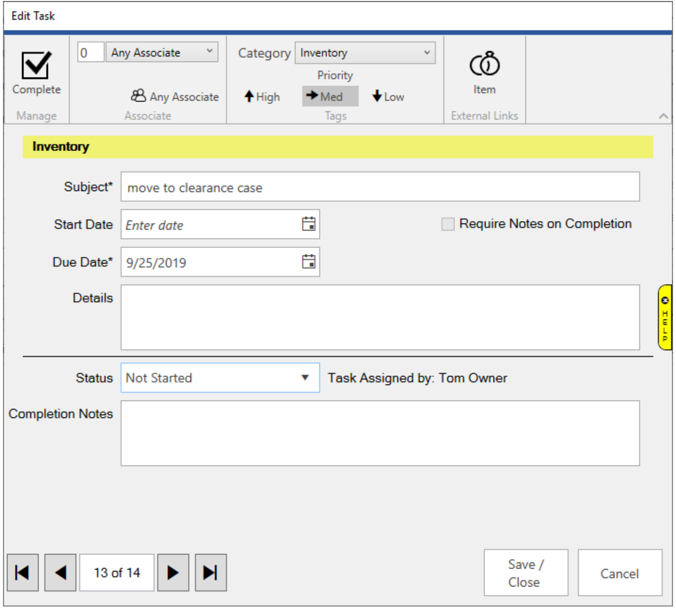
Due Date	Date the task is set to be due.
Associate	Associate the task is assigned to. You can select multiple.
Priority	The priority level of the task.
Status	The current status of the task.
Category	The category or type of task.
Store	The store the task was created in.

3. Enter desired criteria and click **Find**. A list of matching tasks will appear.



Due Date	Associate	Status	Subject	Priority	Category	Links	Completion Date	Created By
9/25/2019	Anyone	Not Started	Count case 5	Medium	● Inventory			Tom Owner
9/25/2019	Jane Sales	Not Started	Follow up with gift ideas	Medium	● Customer	C		Tom Owner
9/25/2019	Nancy Gem	Not Started	Appraise ring	Medium	● Service	C A S		Tom Owner
9/25/2019	Anyone	Not Started	Count case 1	Medium	● Inventory			Tom Owner
9/25/2019	Anyone	Not Started	Count case 2	Medium	● Inventory			Tom Owner
9/25/2019	Anyone	Not Started	Count case 3	Medium	● Inventory			Tom Owner
9/25/2019	Anyone	Not Started	Count case 4	Medium	● Inventory			Tom Owner
9/25/2019	Sally Repair	Not Started	Repair clasp	High	● Service	C R S		Tom Owner
9/25/2019	Sally Repair	Not Started	Call with custom job estimate for approval	High	● Service	C C S		Tom Owner
9/25/2019	Anyone	In Progress	Special Order - call customer with price	High	● Service	C O S		Tom Owner
9/25/2019	Anyone	Not Started	item needs cleaning	High	● Inventory	I		Tom Owner
9/25/2019	Anyone	Not Started	move to clearance case	Medium	● Inventory	I		Tom Owner
9/25/2019	Anyone	Not Started	move to clearance case	Medium	● Inventory	I		Tom Owner
9/25/2019	Anyone	Not Started	advise customer wish list item on sale	Medium	● Customer	C		Tom Owner

4. To edit a task, double click it or select it in the list and click the **Edit** button.



0 Any Associate

Category Inventory

Inventory

Subject* move to clearance case

Start Date Enter date

☐ Require Notes on Completion

Due Date* 9/25/2019

Details

Status Not Started

Task Assigned by: Tom Owner

Completion Notes

13 of 14

5. To complete a task, click the **Complete** icon in the top left or set the **Status** drop-down to **Complete**.
6. Make any desired changes, then click the **Save / Close** button.

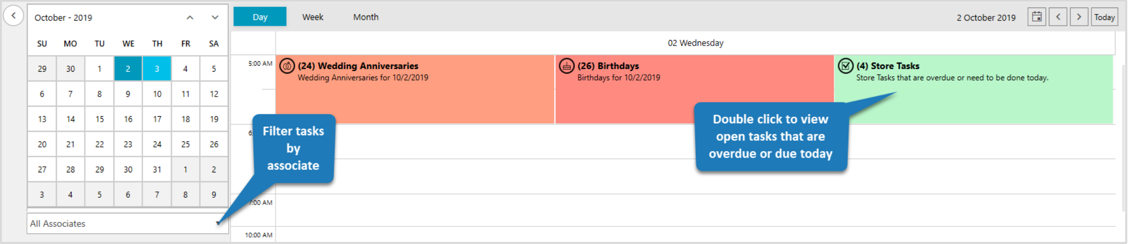
8.2.4.2 My Open Tasks

My Open Tasks displays all open tasks currently assigned to you. It can be used to look up, complete, and edit tasks. To use it:

1. Click **Associate** > **Tasks** > **My Open Tasks**.
2. The login window will appear. Enter your associate credentials.
3. A list of open tasks for this associate will appear. Note that only tasks assigned specifically to the associate appear here. Tasks assigned to **Anyone** will not appear.
4. To edit a task, double click it or select it in the list and click the **Edit** button.
5. To complete a task, click the **Complete** icon in the top left or set the **Status** drop-down to **Complete**.
6. Make any desired changes, then click the **Save / Close** button.

8.2.4.3 Calendar

The **Store Calendar** has a tile for **Store Tasks.** This tile allows you to view and work with tasks.



(24) Wedding Anniversaries
Wedding Anniversaries for 10/2/2019

(26) Birthdays
Birthdays for 10/2/2019

(4) Store Tasks
Store Tasks that are overdue or need to be done today.

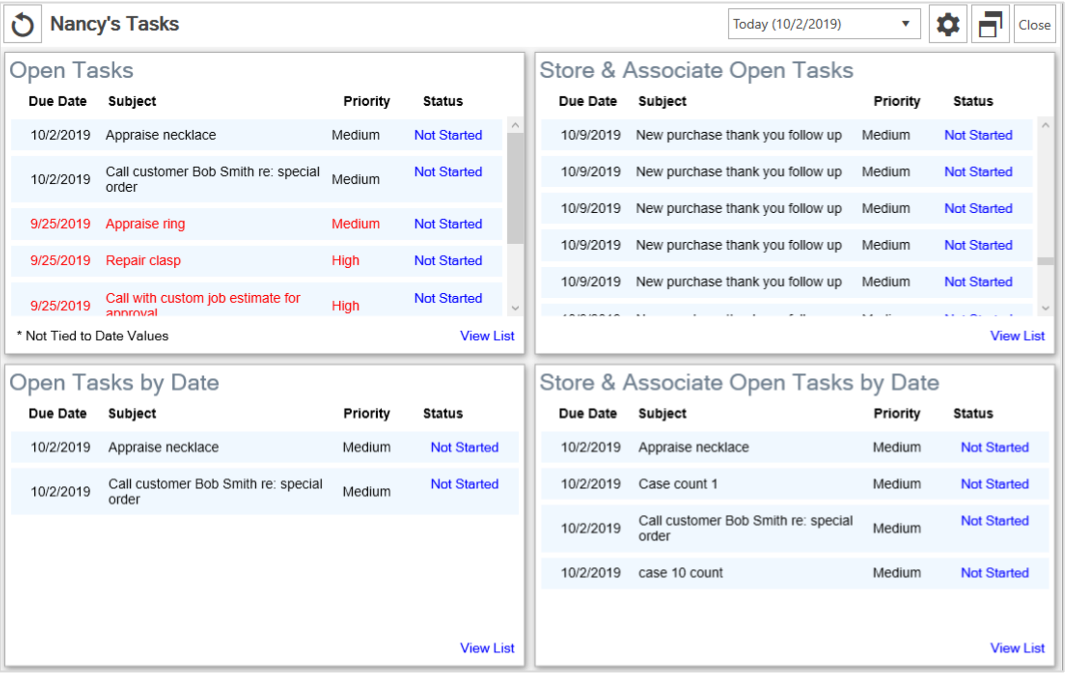
Filter tasks by associate

Double click to view open tasks that are overdue or due today

8.2.4.4 Dashboards

The **Dashboards** feature includes list view tiles that can display task information. There are currently four available.

Open Tasks	All open tasks for selected associate(s) that are open.
Store and Associate Open Tasks	All open tasks for selected associate(s) as well as tasks assigned to 'Anyone' that are open.
Open Tasks by Date	All open tasks for selected associate(s) that are open filtered by dashboard date range.
Store and Associate Open Tasks by Date	All open tasks for selected associate(s) as well as tasks assigned to 'Anyone' that are open filtered by dashboard date range.



Open Tasks

Due Date	Subject	Priority	Status
10/2/2019	Appraise necklace	Medium	Not Started
10/2/2019	Call customer Bob Smith re: special order	Medium	Not Started
9/25/2019	Appraise ring	Medium	Not Started
9/25/2019	Repair clasp	High	Not Started
9/25/2019	Call with custom job estimate for approval	High	Not Started

* Not Tied to Date Values

View List

Store & Associate Open Tasks

Due Date	Subject	Priority	Status
10/9/2019	New purchase thank you follow up	Medium	Not Started
10/9/2019	New purchase thank you follow up	Medium	Not Started
10/9/2019	New purchase thank you follow up	Medium	Not Started
10/9/2019	New purchase thank you follow up	Medium	Not Started
10/9/2019	New purchase thank you follow up	Medium	Not Started

View List

Open Tasks by Date

Due Date	Subject	Priority	Status
10/2/2019	Appraise necklace	Medium	Not Started
10/2/2019	Call customer Bob Smith re: special order	Medium	Not Started

View List

Store & Associate Open Tasks by Date

Due Date	Subject	Priority	Status
10/2/2019	Appraise necklace	Medium	Not Started
10/2/2019	Case count 1	Medium	Not Started
10/2/2019	Call customer Bob Smith re: special order	Medium	Not Started
10/2/2019	case 10 count	Medium	Not Started

View List

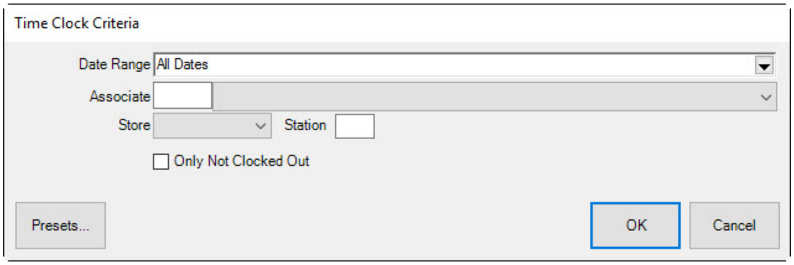
8.3 Time Card

The **Time Card** function is where associates punch in and out. It also offers supervisors an option to view time card data.

8.3.1 Time Card Find

To view time card data:

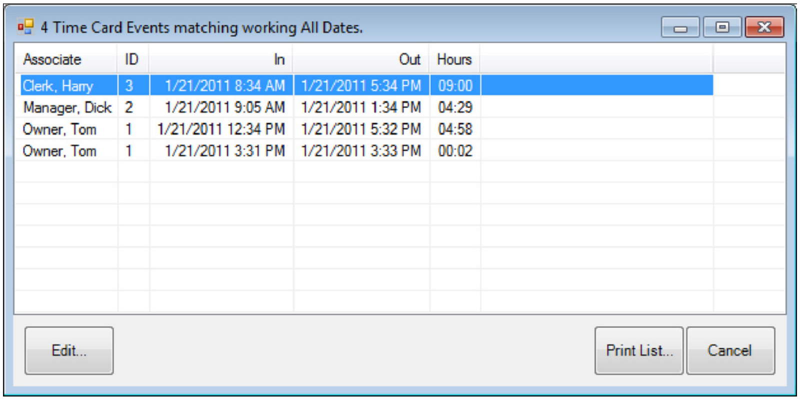
1. Select **Time Card** from the **Associate** menu.
2. Select **Find**. You will be prompted to enter your ID and password.
3. Enter your ID and password.
4. The **Time Clock Criteria** window will appear.



Date Range: All Dates

☐ Only Not Clocked Out

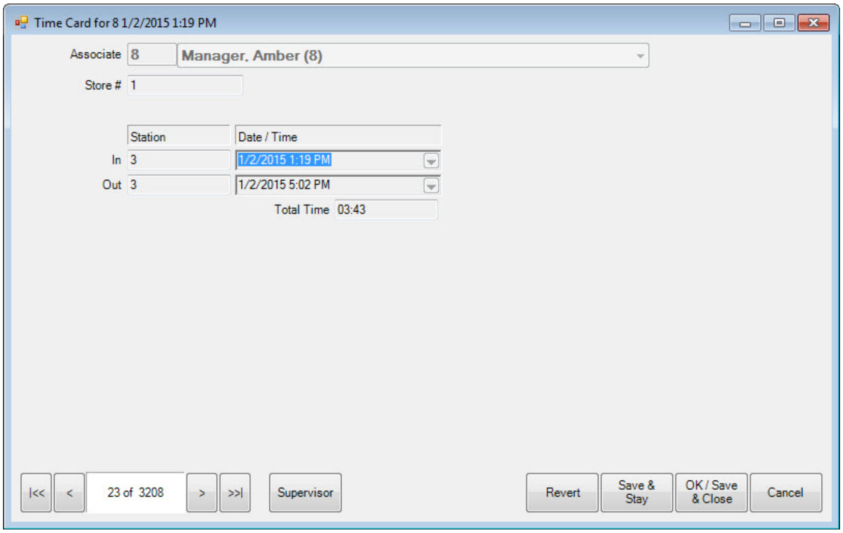
5. Enter the desired criteria and select **OK**. The results will appear in the **Time Card Events** list view.



4 Time Card Events matching working All Dates.

Associate	ID	In	Out	Hours
Clerk, Harry	3	1/21/2011 8:34 AM	1/21/2011 5:34 PM	09:00
Manager, Dick	2	1/21/2011 9:05 AM	1/21/2011 1:34 PM	04:29
Owner, Tom	1	1/21/2011 12:34 PM	1/21/2011 5:32 PM	04:58
Owner, Tom	1	1/21/2011 3:31 PM	1/21/2011 3:33 PM	00:02

6. To edit an entry, select it and select **Edit**. The time card record will appear.



Time Card for 8 1/2/2015 1:19 PM

Associate 8 Manager, Amber (8)

Store # 1

	Station	Date / Time
In	3	1/2/2015 1:19 PM
Out	3	1/2/2015 5:02 PM

Total Time 03:43

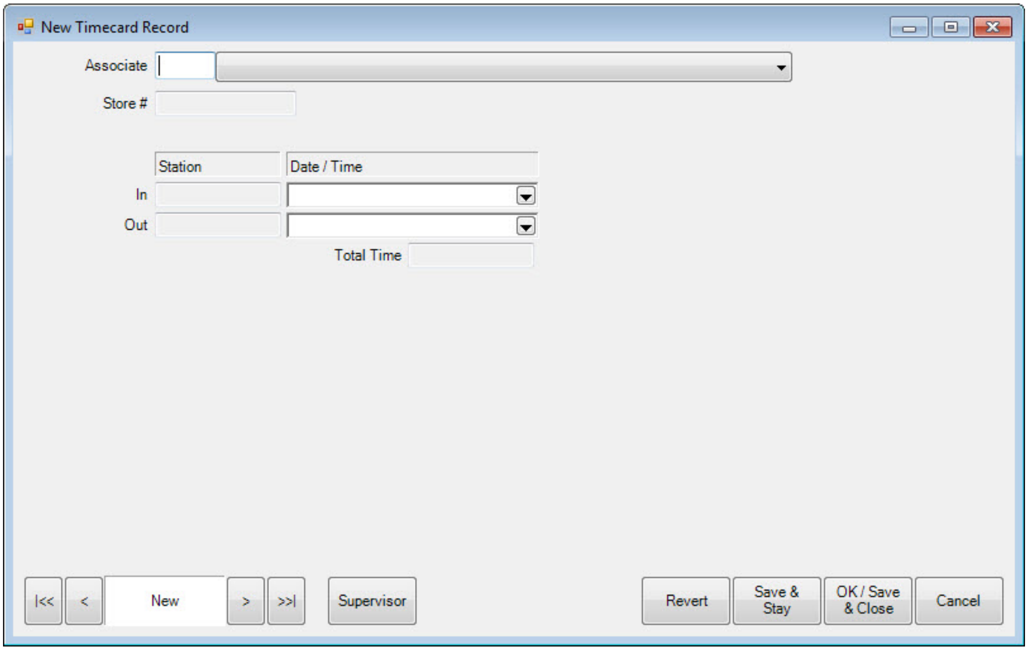
7. Go to the **Supervisor Menu** and select **Enable Time Changing**.
8. Enter the new time and select a save option.

The Attendance report generates time card data.

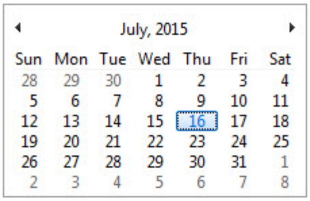
8.3.2 Time Clock Supervisor Override

A supervisor can add an additional punch on behalf of an associate. This can only be done from the **Time Card** list view.

1. Select **Time Clock** from the **Associate** menu.
2. Do a time card find. The results will appear in the **Time Card Events** list view.
3. From the **Time Card Events** list view, select **Supervisor ►Add Time Card Punch**. The **New Time Card Record** window will appear.



4. Select the associate for whom the entry is being made.
5. Enter a store number.
6. Enter a **Date/Time In** and a **Date/Time Out**.
    a. Use the drop-down arrow to pick a date from the calendar.


July, 2015

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

At the bottom of the calendar are fields to enter hour:minute and select A.M. or P.M.


10: 15 AM

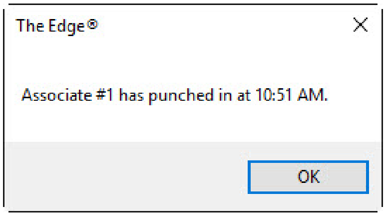
    b. Type in the date and time.
7. Select a save option.

8.3.3 Punch In

To punch in:

1. Select **Time Clock** from the **Associate** menu.
2. Select **Punch In**. You will be prompted to enter your ID and password.

3. Enter your ID and password. You are punched in and a confirmation will appear.

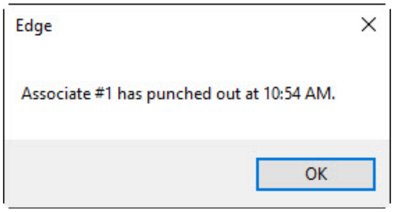


Associate #1 has punched in at 10:51 AM.

8.3.4 Punch Out

To punch out:

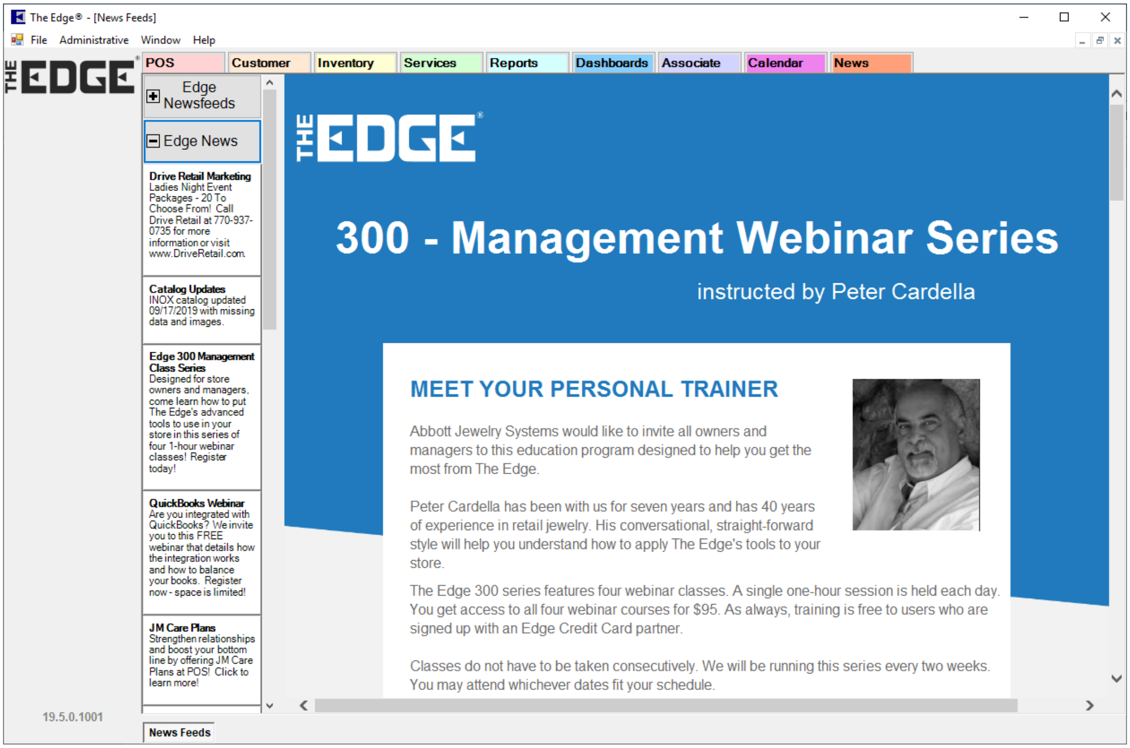
1. Select **Time Clock** from the **Associate** menu.
2. Select **Punch Out**. You will be prompted to enter your ID and password.
3. Enter your ID and password. You are punched out and a confirmation will appear.



Associate #1 has punched out at 10:54 AM.

9 News

The Edge News feed is a communication channel to keep you up-to-date about items of interest concerning The Edge. This is the start page for The Edge and contains information about updates, releases, patches, webinar schedules, and training opportunities. Headlines run down the left side and content occupies the main work area. We recommend you review the Newsfeed daily.



Drive Retail Marketing
Ladies Night Event Packages - 20 To Choose From! Call Drive Retail at 770-937-0735 for more information or visit www.DriveRetail.com.

Catalog Updates
INOX catalog updated 09/17/2019 with missing data and images.

Edge 300 Management Class Series
Designed for store owners and managers, come learn how to put The Edge's advanced tools to use in your store in this series of four 1-hour webinar classes! Register today!

QuickBooks Webinar
Are you integrated with QuickBooks? We invite you to this FREE webinar that details how the integration works and how to balance your books. Register now - space is limited!

JM Care Plans
Strengthen relationships and boost your bottom line by offering JM Care Plans at POS! Click to learn more!

300 - Management Webinar Series

instructed by Peter Cardella

MEET YOUR PERSONAL TRAINER

Abbott Jewelry Systems would like to invite all owners and managers to this education program designed to help you get the most from The Edge.

Peter Cardella has been with us for seven years and has 40 years of experience in retail jewelry. His conversational, straight-forward style will help you understand how to apply The Edge's tools to your store.

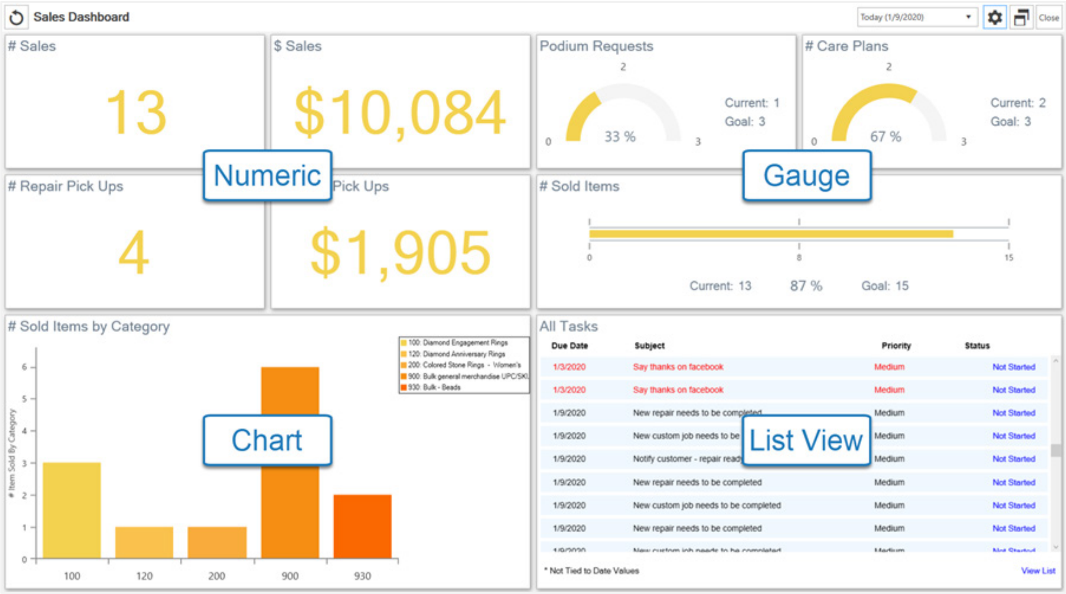
The Edge 300 series features four webinar classes. A single one-hour session is held each day. You get access to all four webinar courses for $95. As always, training is free to users who are signed up with an Edge Credit Card partner.

Classes do not have to be taken consecutively. We will be running this series every two weeks. You may attend whichever dates fit your schedule.

10 Dashboards

Dashboards allow you to put pertinent data at your fingertips in an intuitive, graphical display. Each **Dashboard** consists of one or more tiles and each tile can be setup to display different data. The data displayed can be based on specific associates or all associates.
There are four types of **Dashboard** tiles:

Numeric	Displays a single number; recommended for use on 1 by 1 tiles.
Gauge	Displays a gauge where you can set a goal; recommended for use on 1 by 1 and 1 by 2 tiles.
Chart	Displays a pie, bar, or doughnut chart; recommended for use on 2 by 2 tiles.
List View	Displays a list of actionable records; recommended for use on 2 by 2 tiles.



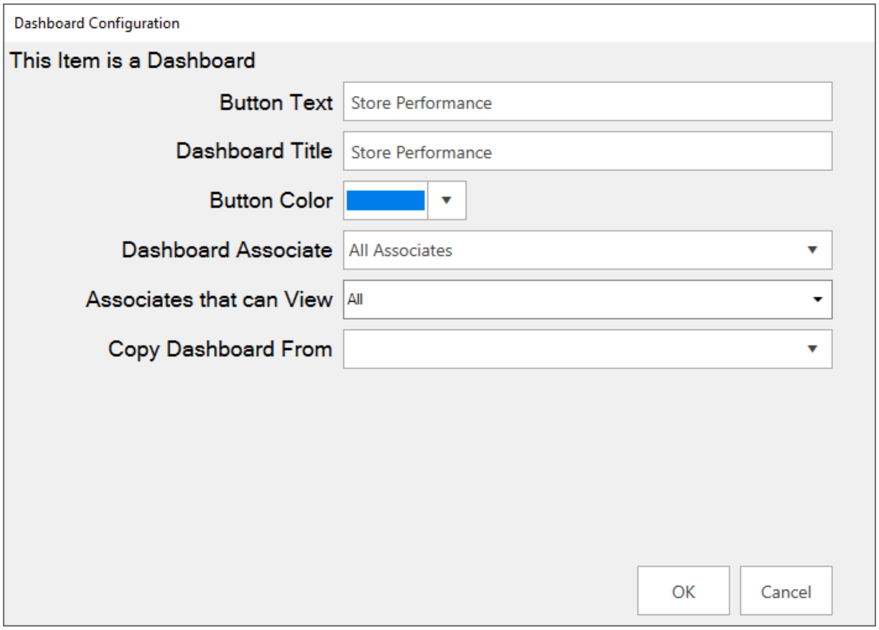
Due Date	Subject	Priority	Status
1/3/2020	Say thanks on facebook	Medium	Not Started
1/3/2020	Say thanks on facebook	Medium	Not Started
1/9/2020	New repair needs to be completed	Medium	Not Started
1/9/2020	New custom job needs to be	Medium	Not Started
1/9/2020	Notify customer - repair ready	Medium	Not Started
1/9/2020	New repair needs to be completed	Medium	Not Started
1/9/2020	New custom job needs to be completed	Medium	Not Started
1/9/2020	New repair needs to be completed	Medium	Not Started

* Not Tied to Date Values

10.1 Creating Dashboards

To create a new **Dashboard**:

1. Click **Dashboards > Add**.



Dashboard Configuration

This Item is a Dashboard

Button Text: Store Performance

Dashboard Title: Store Performance

Button Color: 🟦

Dashboard Associate: All Associates

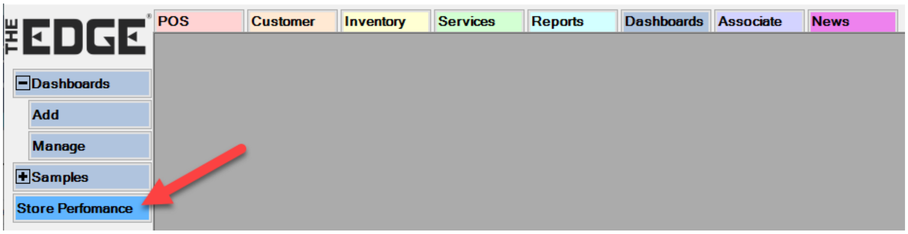
Associates that can View: All

Copy Dashboard From:

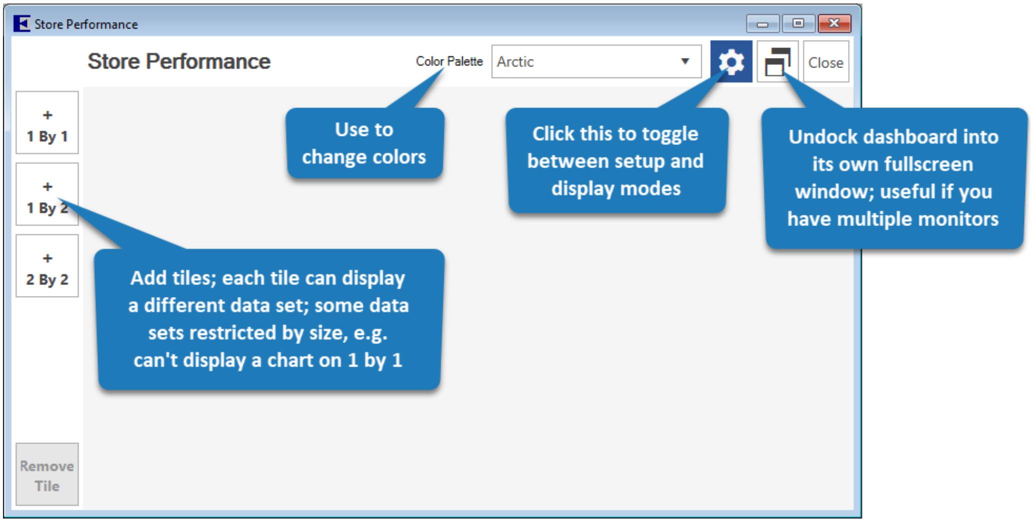
Button Text	Label for the button; each Dashboard will show as its own button in the menu
Dashboard Title	Title that displays at top of Dashboard
Button Color	Color for this Dashboard’s button
Dashboard Associate	Associate that this Dashboard’s data is based on
Associates that can View	Associates that have permission to view this Dashboard
Copy Dashboard From	Copy initial Dashboard setup from an existing one

2. All fields, with the exception of **Copy Dashboard From**, are required. Fill them in and click **OK**. The **Dashboard Management** window will appear.
3. This window controls the positioning of the buttons in the hierarchy. See the **Dashboard Management** section of this document for more information. For now, click **Save/Close** in the lower right.

4. Your **Dashboard** button will appear on the left.



5. Click on the button you just created. The blank dashboard will load.



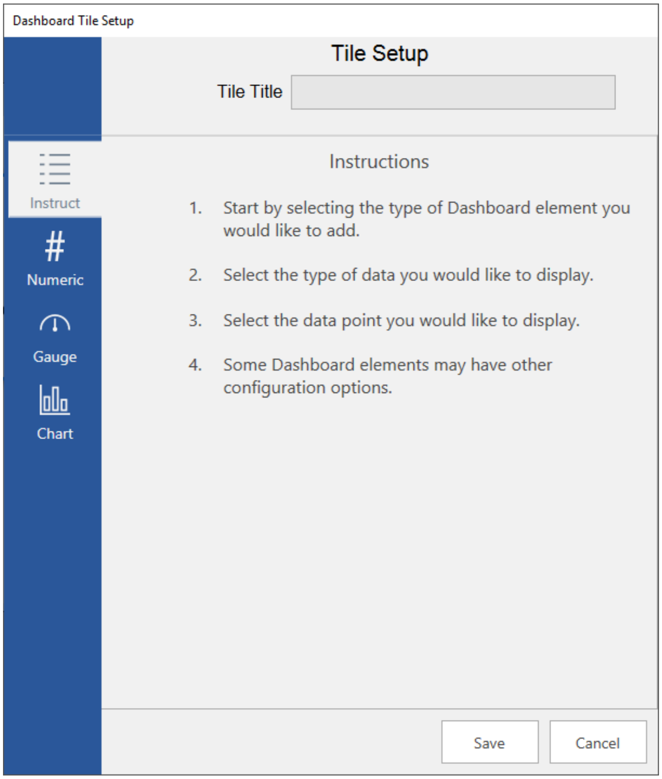
Use to change colors

Click this to toggle between setup and display modes

Undock dashboard into its own fullscreen window; useful if you have multiple monitors

Add tiles; each tile can display a different data set; some data sets restricted by size, e.g. can't display a chart on 1 by 1

6. Click **2 by 2** to create your first tile, then click the **Gear** icon on the tile to enter setup.



Instructions

1. Start by selecting the type of Dashboard element you would like to add.
2. Select the type of data you would like to display.
3. Select the data point you would like to display.
4. Some Dashboard elements may have other configuration options.

7. There are four types of Dashboards:

Numeric	Displays a number; recommended for use on 1 by 1 tiles
Gauge	Creates a gauge with goals; useful for tracking progress
Chart	Displays a pie, bar, or doughnut chart; best used with 2 by 2 tiles
List View	Displays a list of actionable records such as tasks, customers, appointments, etc.

8. For this example, click on **Chart**.
9. Use the drop-downs to select:
   a. **Data Set:** Sales Data
   b. **Data Value to Display**: # Sales by Associate
   c. **Chart Type:** Pie Chart

10. The **Tile Title** will automatically fill in to match selected data, but you can change it if you like.

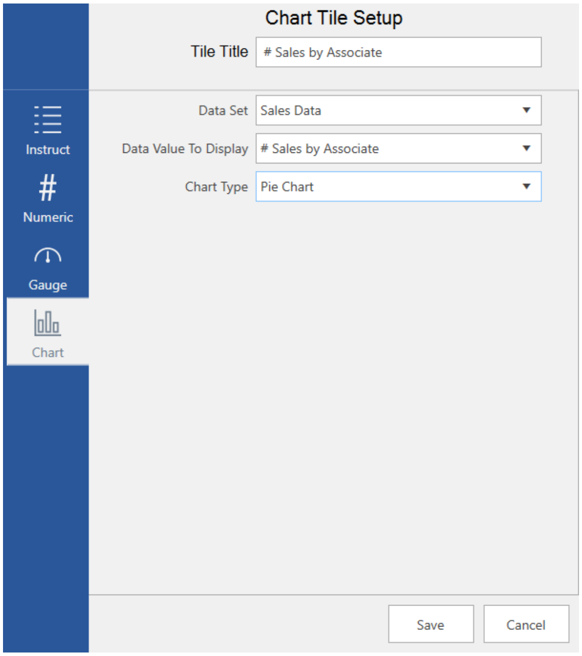


Chart Tile Setup

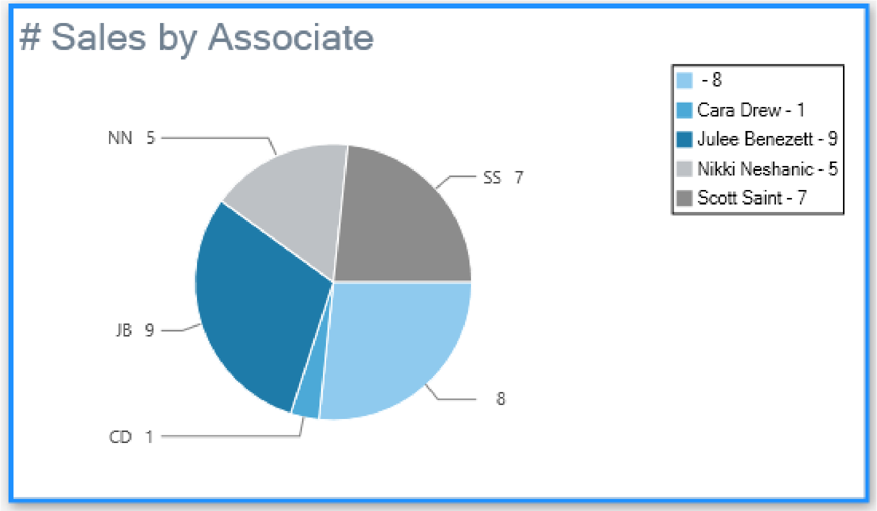
Tile Title: # Sales by Associate

Data Set: Sales Data

Data Value To Display: # Sales by Associate

Chart Type: Pie Chart

11. Click **Save** to add this tile.



Sales by Associate

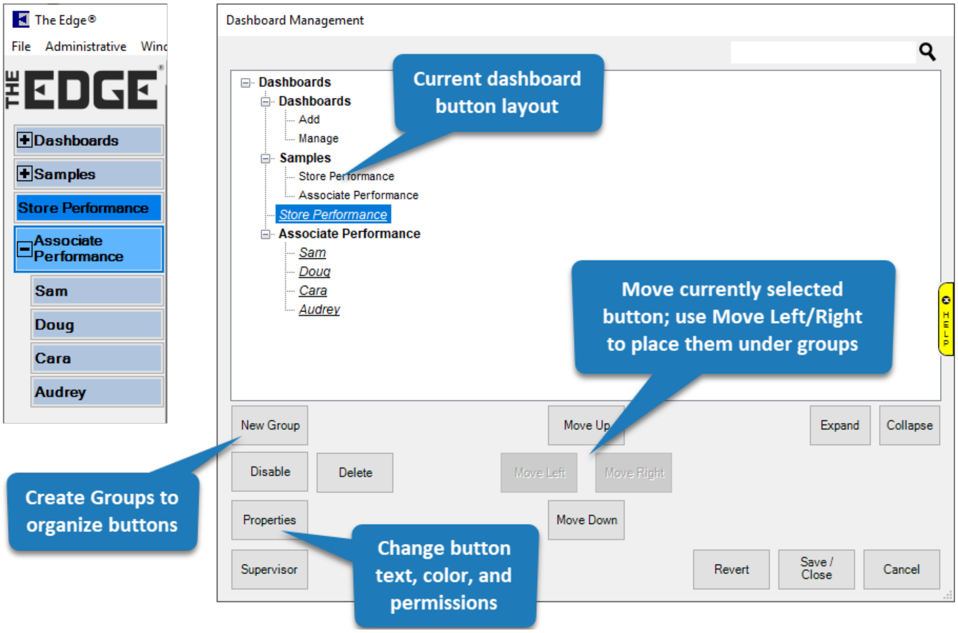
12. Repeat to add as many additional tiles as you like.
13. If you make a mistake or want to delete a tile, use the **Remove Tile** button.
14. When done, click the **Gear** icon in the top right to toggle out of configuration mode.

10.2 Working with Dashboards

10.2.1 Organizing

When creating new **Dashboards**, each will show up as a button on the left. You can use **Dashboard Management** to change the order, and grouping, of these buttons. To do so:

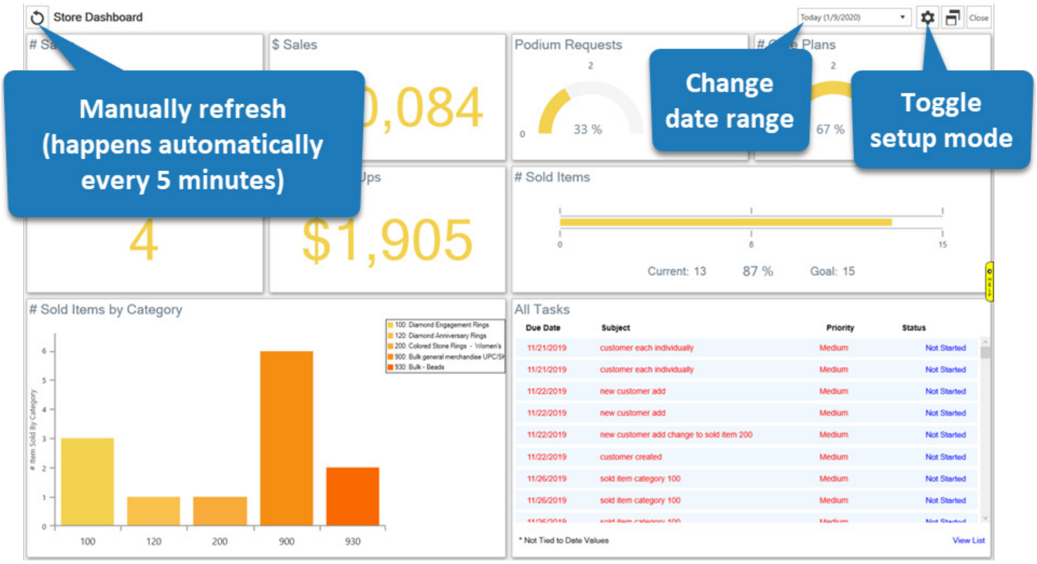
1. Click **Dashboards > Manage.** The **Dashboard Management** window will appear.



2. This window will reflect the current button layout. Each time you create a new Dashboard, it will show up at the bottom of the list.
3. To change the button order, select the button and use **Move Up / Move Down**.
4. To group buttons, first click **New Group** and enter text to display. Then use **Move Up / Down** to position it. Finally, to place buttons in the group, move them under it and use **Move Right**.
5. When finished click **Save/Close** to save the menu structure.

10.2.2 Viewing

To view a **Dashboard**, click its corresponding button in The Edge menu.



All Tasks

Due Date	Subject	Priority	Status
11/21/2019	customer each individually	Medium	Not Started
11/21/2019	customer each individually	Medium	Not Started
11/22/2019	new customer add	Medium	Not Started
11/22/2019	new customer add	Medium	Not Started
11/22/2019	new customer add change to sold item 200	Medium	Not Started
11/22/2019	customer created	Medium	Not Started
11/26/2019	sold item category 100	Medium	Not Started
11/26/2019	sold item category 100	Medium	Not Started

* Not Tied to Date Values

View List

10.2.3 Editing

To change the button text, button color, dashboard title, or associates for an existing **Dashboard**:

1. Click **Dashboards > Manage**. The **Dashboard Management** window will appear.
2. Select your **Dashboard**, then click the **Properties** button.
3. Make desired changes, then click **OK**.
4. Click **Save/Close** to save your changes.

To change a **Dashboard** tile:

1. Click on the **Dashboard** to open it.
2. Click the **Gear** icon in the top right to enter setup mode.
3. Click on the tile you wish to edit, then click on its gear icon.
4. Make desired changes, then click **Save**.

When changing the data displayed on an existing tile be sure to update the tile's **Title**.

10.2.4 Deleting

To delete an existing **Dashboard**:

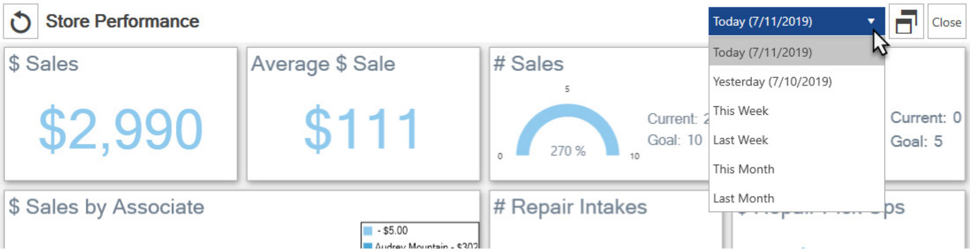
1. Click **Dashboards > Manage**. The **Dashboard Management** window will appear.

2. Select your **Dashboard**, then click the **Delete** button.
3. Click **Save/Close** to save your changes.

10.3 Frequently Asked Questions

Q: What date range is the data based on? Do I get to choose specific dates?

A: Dashboards give you the option to display data from **Today**, **Yesterday**, **This Week**, **Last Week**, **This Month**, or **Last Month**. There is a drop-down date selector at the top right. Note that this does not appear when you have configuration mode (Gear icon) toggled on.



Q: What is the sales data based on? Do sales figures include services?

A: Services are not counted in any dollar figures (e.g. $ Sales, $ Profit) until they are finished and picked up. The only exception to this is Total $ Tender which will always show all money taken in regardless of transaction type.

Service transactions do count towards number of sales each step of the way, so doing a repair intake, then a payment, then a pick up would result in 3 sales, but would not be reflect on $ Sales until pick up.

Data values containing the word ‘Sales’ include all transaction types. Data values containing the words ‘Sold Item’ specifically look at items and do not count services, miscellaneous charges, or other transaction types.

Q: How often does the Dashboard refresh?

A: The Dashboard automatically refreshes every 5 minutes. You can manually refresh at any time using the Refresh icon on the top left. Note this icon is not visible if your dashboard is still in configuration mode.

Q: Can I move Dashboard tiles once they are created?

A: Not at this time; you can though change the data presented or remove and re-add tiles.

Q: Will you be adding more data types and choices?

A: Yes we plan to continue to add more data. If you have a suggestion for something you would like to see please email it into Support@ajsllc.com. We also have plans to add additional tile sizes and types.

11 Store Calendar

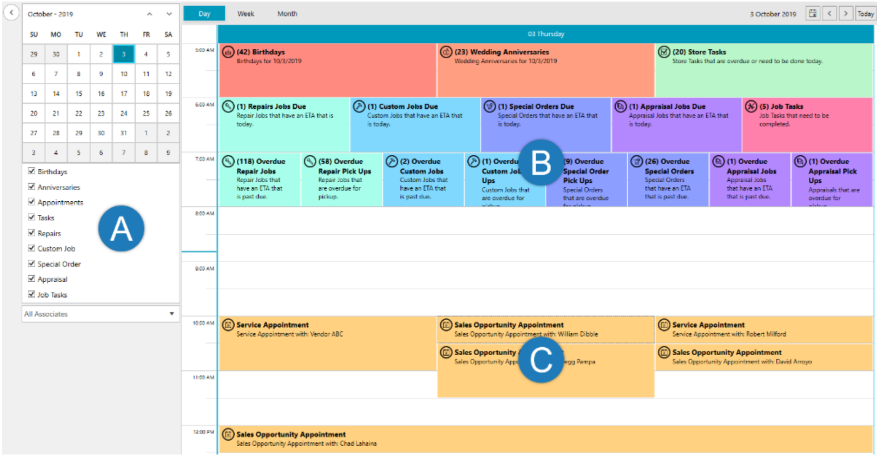
The Edge provides an interactive **Store Calendar** that allows you to see and act on:

Customer Occasions
Create mailing lists, directly email, or simply view customers with upcoming birthdays and anniversaries.

Service Jobs
View jobs (repairs, custom orders, special orders, appraisals, assemblies, and builds) and job tasks that are due, overdue for completion, and overdue for pickup.

Customer Appointments
Schedule and manage your appointments.

Associate Tasks
View and manage tasks for all or specific associates.



☑ Birthdays
☑ Anniversaries
☑ Appointments
☑ Tasks
☑ Repairs
☑ Custom Job
☑ Special Order
☑ Appraisal
☑ Job Tasks

All Associates

(42) Birthdays Birthdays for 10/3/2019

(23) Wedding Anniversaries Wedding Anniversaries for 10/3/2019

(20) Store Tasks Store Tasks that are overdue or need to be done today.

(1) Repairs Jobs Due Repair Jobs that have an ETA that is today.

(1) Custom Jobs Due Custom Jobs that have an ETA that is today.

(1) Special Orders Due Special Orders that have an ETA that is today.

(1) Appraisal Jobs Due Appraisal Jobs that have an ETA that is today.

(5) Job Tasks Job Tasks that need to be completed.

(118) Overdue Repair Jobs Repair Jobs that have an ETA that is past due.

(58) Overdue Repair Pick Ups Repair Jobs that are overdue for pickup.

(2) Overdue Custom Jobs Custom Jobs that have an ETA that is past due.

(1) Overdu Custom Job Ups Custom Jobs that are overdue for

9) Overdue Special Order Pick Ups Special Orders that are overdue

(26) Overdue Special Orders Special Orders that have an ETA that is past due.

(1) Overdue Appraisal Jobs Appraisal Jobs that have an ETA that is past due.

(1) Overdue Appraisal Pick Ups Appraisals that are overdue for

Service Appointment Service Appointment with: Vendor ABC

Sales Opportunity Appointment Sales Opportunity Appointment with: William Dibble

Service Appointment Service Appointment with: Robert Milford

Sales Opportunity Sales Opportunity App egg Pampa

Sales Opportunity Appointment Sales Opportunity Appointment with: David Arroyo

Sales Opportunity Appointment Sales Opportunity Appointment with: Chad Lahaina

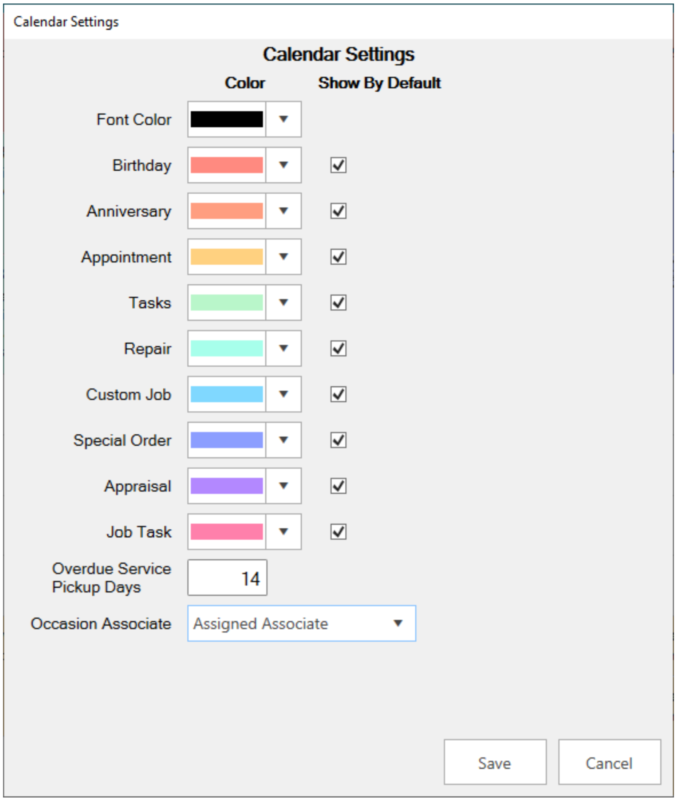
A	These checkboxes toggle which occasions, services, and tasks to display. The drop-down allows you to filter these records by associate. You can select a specific associate, see all associates, or only see records not assigned to any associate.
B	Customer occasions, service jobs, and tasks will always display at the top starting in the 5AM timeslot. The number in parenthesis indicates how many underlying records are present. Double click on a tile to view matching records and possible actions.
C	Customer appointments will display at their respective times. Double click an existing appointment to edit it. Double click an open timeslot to create a new appointment.

11.1 Using the Calendar

11.1.1 Settings

To access **Calendar Settings**:

1. Click **Associate > Calendar**. The **Store Calendar** will appear.
2. In the top right, click the ⚙ (**Settings**) button. The **Calendar Settings** window will appear.



Calendar Settings

	Color	Show By Default
Font Color	■	
Birthday	🟥	☑
Anniversary	🟧	☑
Appointment	🟨	☑
Tasks	🟩	☑
Repair	🟩	☑
Custom Job	🟦	☑
Special Order	🟦	☑
Appraisal	🟪	☑
Job Task	🟥	☑

Overdue Service Pickup Days: 14

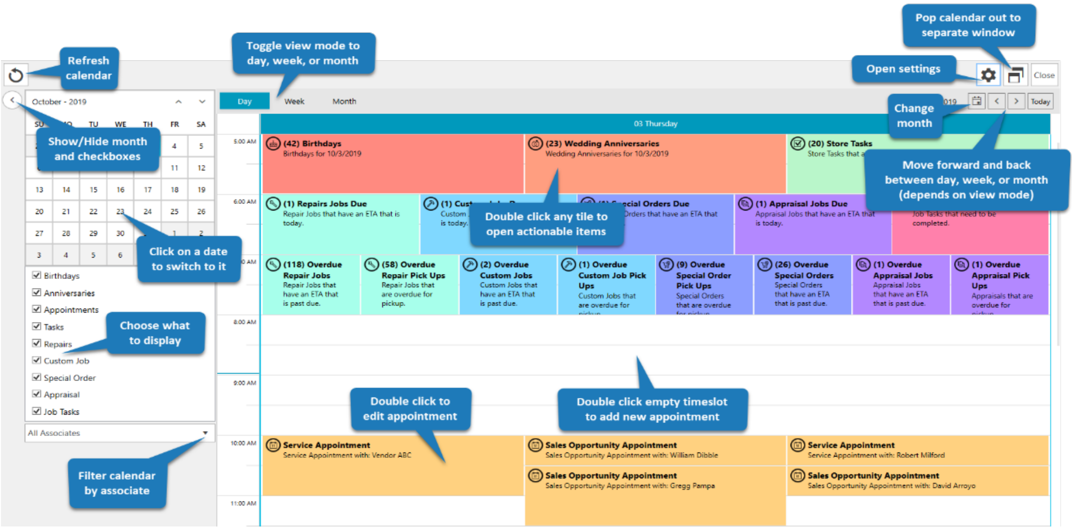
Occasion Associate: Assigned Associate

3. Use the **Color** drop-down to change the color used for each element of the calendar.
4. Use the **Show By Default** checkbox to determine which occasions and services appear on the calendar by default. These can always be changed on the fly from the main calendar view, too.
5. **Service Done Days** defines the number of days a service job must be overdue before it starts appearing on the calendar, e.g. enter ‘14’ if you want jobs to show up as overdue once they have been completed but not picked up for 14 days.
6. **Occasions Associate** allows you to determine which associate is assigned to each customer. There are three choices:

Assigned Associate	Associate manually assigned on the customer record’s **Other Keys** tab.
Last Transaction Associate	Associate that last processed any type of transaction for this customer.
Last Merchandise Associate	Associate that last processed a merchandise sale or service intake.

7. Make any desired changes, then click **Save**.

11.1.2 Overview



Refresh calendar

Toggle view mode to day, week, or month

Pop calendar out to separate window

Open settings

Change month

Show/Hide month and checkboxes

Move forward and back between day, week, or month (depends on view mode)

Double click any tile to open actionable items

Click on a date to switch to it

Choose what to display

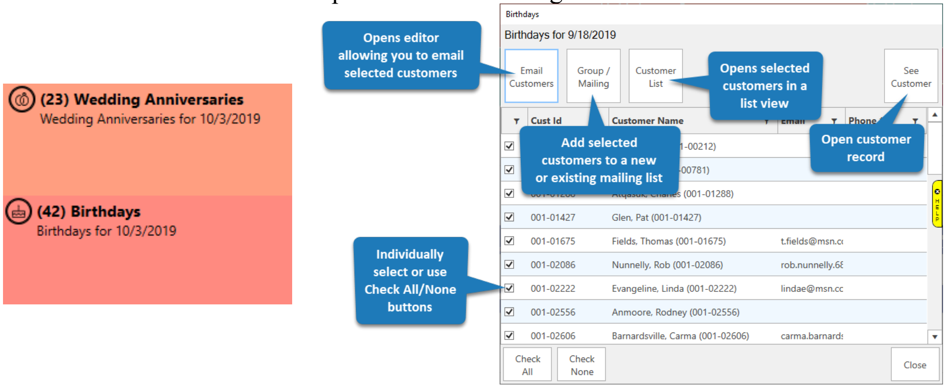
Double click to edit appointment

Double click empty timeslot to add new appointment

Filter calendar by associate

11.1.3 Occasions

Double click the **Occasions** tile to open a list of matching customers.



Birthdays for 9/18/2019

	Cust Id	Customer Name	Email	Phone
☑		1-00212)		
☑		-00781)		
☑		Atqasuk, Charles (001-01288)		
☑	001-01427	Glen, Pat (001-01427)		
☑	001-01675	Fields, Thomas (001-01675)	t.fields@msn.c	
☑	001-02086	Nunnelly, Rob (001-02086)	rob.nunnelly.6	
☑	001-02222	Evangeline, Linda (001-02222)	lindae@msn.c	
☑	001-02556	Anmoore, Rodney (001-02556)		
☑	001-02606	Barnardsville, Carma (001-02606)	carma.barnard	

Opens editor allowing you to email selected customers

Opens selected customers in a list view

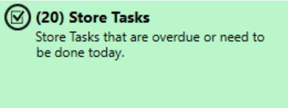
Add selected customers to a new or existing mailing list

Open customer record

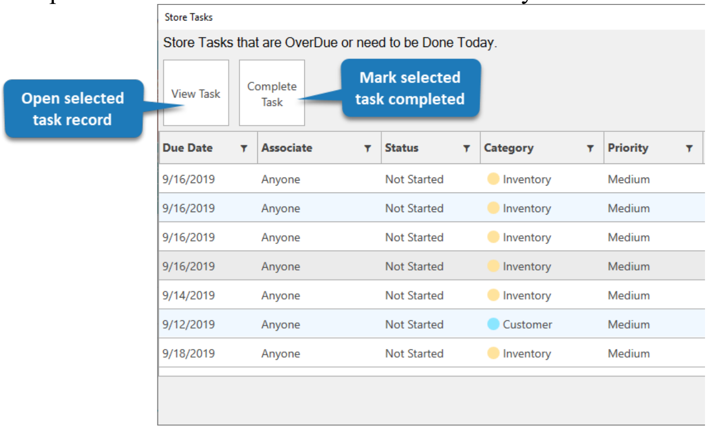
Individually select or use Check All/None buttons

11.1.4 Store Tasks

Double click the **Store Tasks** tile to open a list of associate tasks that are due today or overdue.



(20) Store Tasks
Store Tasks that are overdue or need to be done today.



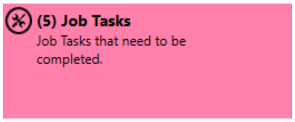
Store Tasks

Store Tasks that are OverDue or need to be Done Today.

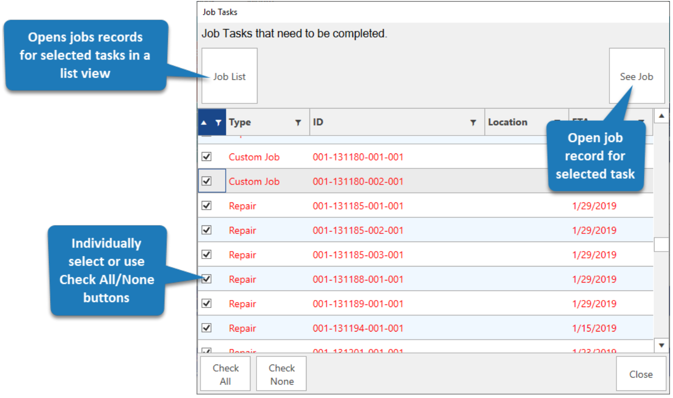
Due Date	Associate	Status	Category	Priority
9/16/2019	Anyone	Not Started	🟡 Inventory	Medium
9/16/2019	Anyone	Not Started	🟡 Inventory	Medium
9/16/2019	Anyone	Not Started	🟡 Inventory	Medium
9/16/2019	Anyone	Not Started	🟡 Inventory	Medium
9/14/2019	Anyone	Not Started	🟡 Inventory	Medium
9/12/2019	Anyone	Not Started	🔵 Customer	Medium
9/18/2019	Anyone	Not Started	🟡 Inventory	Medium

11.1.5 Job Tasks

Double click the **Job Tasks** tile to open a list of job tasks that are due today or overdue. Job tasks include repairs, custom orders, builds, and assemblies.



(5) Job Tasks
Job Tasks that need to be completed.



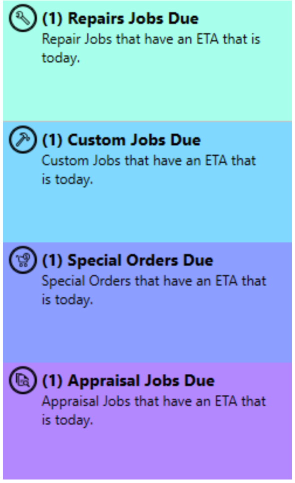
Job Tasks

Job Tasks that need to be completed.

	Type	ID	Location	
☑	Custom Job	001-131180-001-001		
☑	Custom Job	001-131180-002-001		
☑	Repair	001-131185-001-001		1/29/2019
☑	Repair	001-131185-002-001		1/29/2019
☑	Repair	001-131185-003-001		1/29/2019
☑	Repair	001-131188-001-001		1/29/2019
☑	Repair	001-131189-001-001		1/29/2019
☑	Repair	001-131194-001-001		1/15/2019

11.1.6 Services Due

Each service type (repair, custom job, special order, and appraisal) will have a **Due** tile, e.g. Repair Jobs Due, Custom Jobs Due, etc. Double click this tile to open a list of service jobs that have an ETA of today and are not completed.

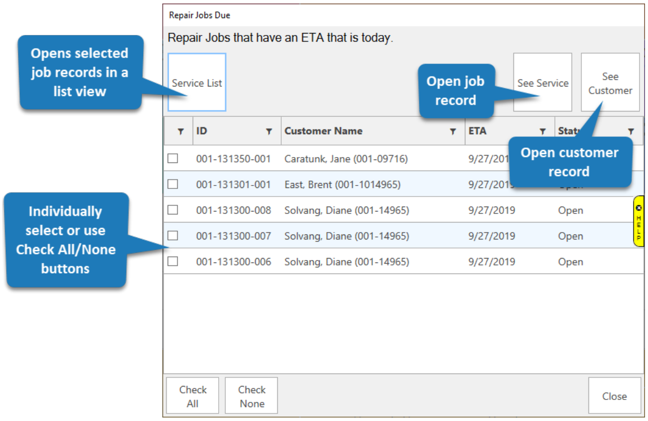


(1) Repairs Jobs Due
Repair Jobs that have an ETA that is today.

(1) Custom Jobs Due
Custom Jobs that have an ETA that is today.

(1) Special Orders Due
Special Orders that have an ETA that is today.

(1) Appraisal Jobs Due
Appraisal Jobs that have an ETA that is today.



Repair Jobs Due

Repair Jobs that have an ETA that is today.

	ID	Customer Name	ETA	Stat
☐	001-131350-001	Caratunk, Jane (001-09716)	9/27/201	
☐	001-131301-001	East, Brent (001-1014965)	9/27/201	
☐	001-131300-008	Solvang, Diane (001-14965)	9/27/2019	Open
☐	001-131300-007	Solvang, Diane (001-14965)	9/27/2019	Open
☐	001-131300-006	Solvang, Diane (001-14965)	9/27/2019	Open

Opens selected job records in a list view

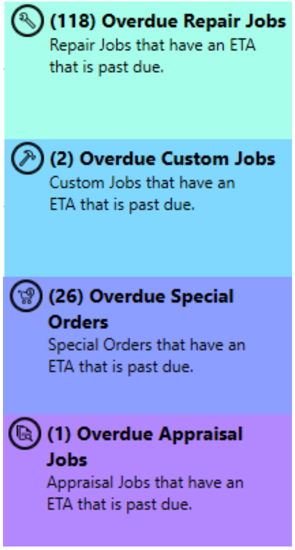
Open job record

Open customer record

Individually select or use Check All/None buttons

11.1.7 Services Overdue

Each service type (repair, custom job, special order, and appraisal) will have an **Overdue** tile, e.g. Overdue Repair Jobs, Overdue Custom Jobs, etc. Double click this tile to open a list of service jobs that have a past due ETA, but are not completed.

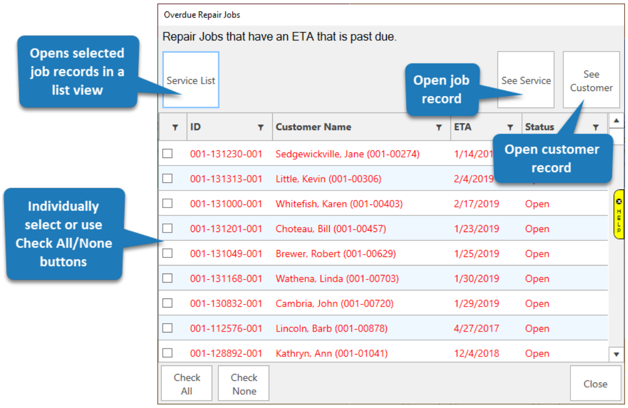


(118) Overdue Repair Jobs
Repair Jobs that have an ETA that is past due.

(2) Overdue Custom Jobs
Custom Jobs that have an ETA that is past due.

(26) Overdue Special Orders
Special Orders that have an ETA that is past due.

(1) Overdue Appraisal Jobs
Appraisal Jobs that have an ETA that is past due.



Overdue Repair Jobs

Repair Jobs that have an ETA that is past due.

	ID	Customer Name	ETA	Status
☐	001-131230-001	Sedgewickville, Jane (001-00274)	1/14/201	
☐	001-131313-001	Little, Kevin (001-00306)	2/4/2019	
☐	001-131000-001	Whitefish, Karen (001-00403)	2/17/2019	Open
☐	001-131201-001	Choteau, Bill (001-00457)	1/23/2019	Open
☐	001-131049-001	Brewer, Robert (001-00629)	1/25/2019	Open
☐	001-131168-001	Wathena, Linda (001-00703)	1/30/2019	Open
☐	001-130832-001	Cambria, John (001-00720)	1/29/2019	Open
☐	001-112576-001	Lincoln, Barb (001-00878)	4/27/2017	Open
☐	001-128892-001	Kathryn, Ann (001-01041)	12/4/2018	Open

Opens selected job records in a list view

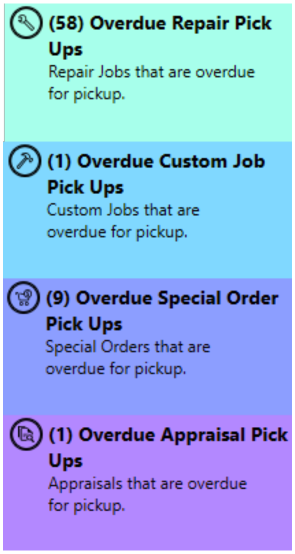
Open job record

Open customer record

Individually select or use Check All/None buttons

11.1.8 Services Overdue Pick Up

Each service type (repair, custom job, special order, and appraisal) will have an **Overdue Pick Up** tile, e.g. Overdue Repair Pick Ups, Overdue Custom Pick Ups, etc. Double click this tile to open a list of service jobs that are overdue for pick up.

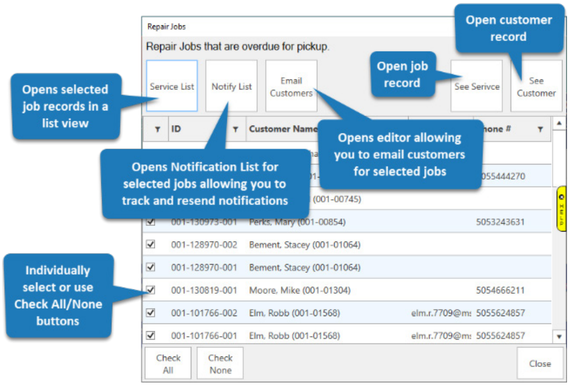


(58) Overdue Repair Pick Ups
Repair Jobs that are overdue for pickup.

(1) Overdue Custom Job Pick Ups
Custom Jobs that are overdue for pickup.

(9) Overdue Special Order Pick Ups
Special Orders that are overdue for pickup.

(1) Overdue Appraisal Pick Ups
Appraisals that are overdue for pickup.



Repair Jobs

Repair Jobs that are overdue for pickup.

	ID	Customer Name		hone #
				055444270
		(001-00745)		
☑	001-130973-001	Perks, Mary (001-00854)		5053243631
☑	001-128970-002	Bement, Stacey (001-01064)		
☑	001-128970-001	Bement, Stacey (001-01064)		
☑	001-130819-001	Moore, Mike (001-01304)		5054666211
☑	001-101766-002	Elm, Robb (001-01568)	elm.r.7709@m:	5055624857
☑	001-101766-001	Elm, Robb (001-01568)	elm.r.7709@m:	5055624857

Opens selected job records in a list view

Opens Notification List for selected jobs allowing you to track and resend notifications

Opens editor allowing you to email customers for selected jobs

Open job record

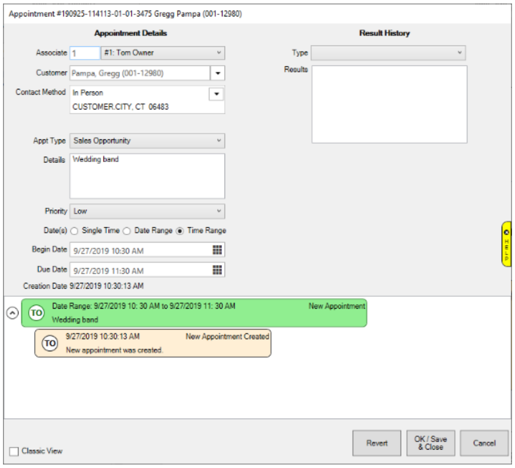
Open customer record

Individually select or use Check All/None buttons

11.1.9 Appointments

Each appointment will have its own tile in the corresponding timeslot on the calendar. Double click the tile to open the appointment record.

Sales Opportunity Appointment
Sales Opportunity Appointment with:
Gregg Pampa



Appointment #190925-114113-01-01-3475 Gregg Pampa (001-12980)

Appointment Details

Associate 1 #1: Tom Owner
Customer Pampa, Gregg (001-12980)
Contact Method In Person
CUSTOMER.CITY, CT 06483
Appt Type Sales Opportunity
Details Wedding band
Priority Low
Date(s) ○ Single Time ○ Date Range ● Time Range
Begin Date 9/27/2019 10:30 AM
Due Date 9/27/2019 11:30 AM
Creation Date 9/27/2019 10:30:13 AM

Result History

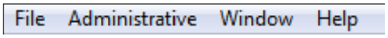
Type
Results

TO Date Range: 9/27/2019 10: 30 AM to 9/27/2019 11: 30 AM New Appointment
Wedding band

TO 9/27/2019 10:30:13 AM New Appointment Created
New appointment was created.

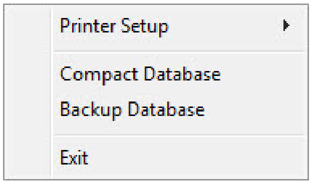
12 The Edge Menu Bar

The Edge Menu Bar at the top left corner of the window contains options common to most Windows-type applications, with the exception of **Administrative**, which contains The Edge administrative functions.



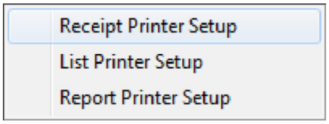
12.1 File Menu

The **File** menu contains options for printing, compacting the database, backing up the database, and exiting The Edge.



12.1.1 Printer Setup

Printer setup is generally dictated by Windows and the printer drivers. Open each to see the properties available for the device and edit them as needed. For example, if your receipts should be printed in color, select the printer's color option.



Options include paper size and location, portrait or landscape orientation, and margins. The Edge generally has at least three printers associated with it.

Receipt Printer	Prints receipts for customer transactions.
List Printer	Prints lists for marketing and management use.
Report Printer	Prints reports. This printer is used for item sheets, repair sheets, job sheets, and envelope inserts.

For all printing types to print correctly, it is crucial that your printer margins are all set to .25".

The tag printer is set up in Administrative ► Configure.

To create PDFs, you need to install a PDF printer (generator). This installs and looks like a normal Windows printer, except when you print to it, it generates a PDF file of whatever you are printing. With this, you can print a document to PDF file, which you can then attach to an e-mail or save or print.

12.1.2 Compact Database

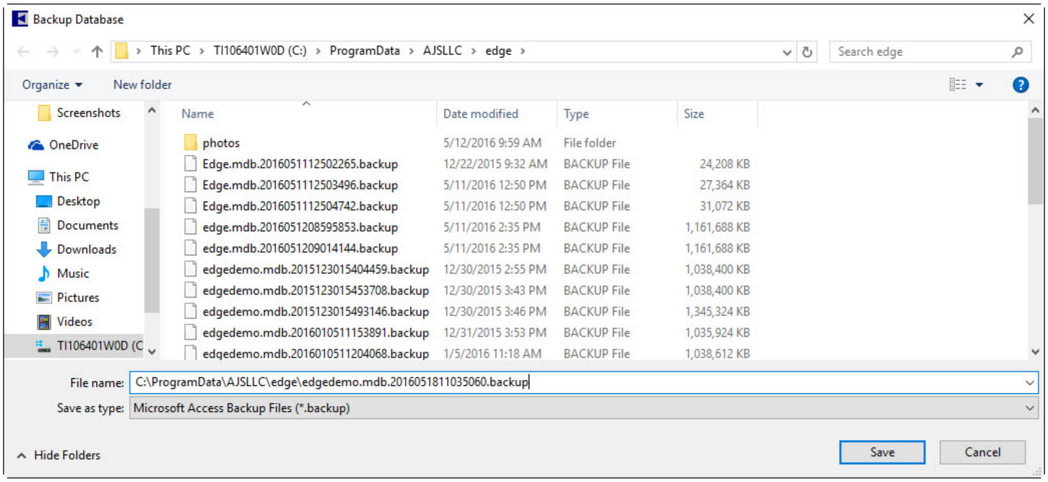
Compacting the database is a password-protected function available only to supervisors. It defragments data and makes it more efficient. This is not required unless directed by The Edge Support Team.

12.1.3 Backup Database

To be used as a safeguard before working on the database, creates an extra copy of your database. This is in addition to any regular or automated database backups you make as described in the section entitled Backing Up the Database, which should happen regularly regardless of what you do here.

To back up the database:

1. Select **File ► Backup Database**. You will be prompted to select a location to store the backup file.



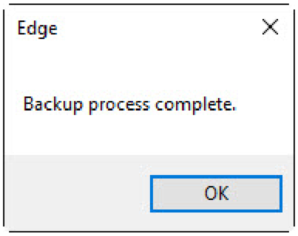
Name	Date modified	Type	Size
photos	5/12/2016 9:59 AM	File folder	
Edge.mdb.201605111250265.backup	12/22/2015 9:32 AM	BACKUP File	24,208 KB
Edge.mdb.2016051112503496.backup	5/11/2016 12:50 PM	BACKUP File	27,364 KB
Edge.mdb.2016051112504742.backup	5/11/2016 12:50 PM	BACKUP File	31,072 KB
edge.mdb.2016051208595853.backup	5/11/2016 2:35 PM	BACKUP File	1,161,688 KB
edge.mdb.2016051209014144.backup	5/11/2016 2:35 PM	BACKUP File	1,161,688 KB
edgedemo.mdb.2015123015404459.backup	12/30/2015 2:55 PM	BACKUP File	1,038,400 KB
edgedemo.mdb.2015123015453708.backup	12/30/2015 3:43 PM	BACKUP File	1,038,400 KB
edgedemo.mdb.2015123015493146.backup	12/30/2015 3:46 PM	BACKUP File	1,345,324 KB
edgedemo.mdb.2016010511153891.backup	12/31/2015 3:53 PM	BACKUP File	1,035,924 KB
edgedemo.mdb.2016010511204068.backup	1/5/2016 11:18 AM	BACKUP File	1,038,612 KB

File name: C:\ProgramData\AJSLLC\edge\edgedemo.mdb.2016051811035060.backup

Save as type: Microsoft Access Backup Files (*.backup)

The prompt will default to your current database location. In most cases, it is `c:\ProgramData\AJSLLC\edge`.

2. If needed, change these settings.
3. Select **Save**.
4. Before continuing with other activities in The Edge, wait for the backup to be complete. It may take a few minutes.



Backup process complete.

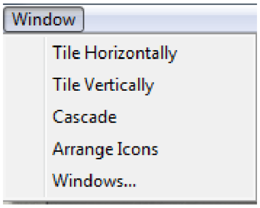
12.1.4 Exit

Selecting **Exit** from the **File** menu has the same effect as closing The Edge using the close button.

Notice that **Exit** will completely close The Edge, not just the selected window.

12.2 Window Menu

The **Window** menu contains options for window arrangement and navigation.



Tile Horizontally	Displays open windows one above the other.
Tile Vertically	Displays open windows next to each other.
Cascade	Displays a series of windows in a splayed fashion.
Arrange Icons	Moves minimized windows to the bottom of The Edge screen.
Windows	Allows you to select from any open windows for immediate access.

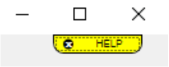
12.3 Help Menu

The Help menu offers a few options for obtaining assistance about The Edge.

12.3.1 Help

Help contains access to The Edge's online help system, which contains the same information as this document, indexed, and searchable for easy reference.

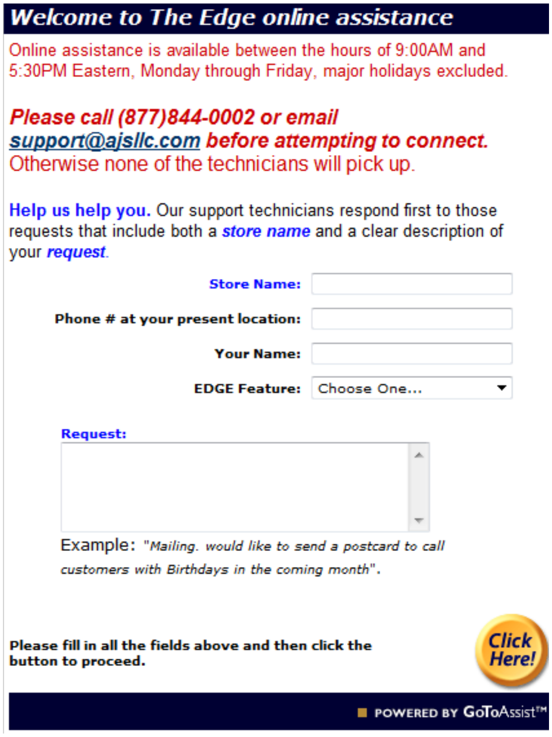
Context-sensitive help is available from the **Help** tab on the side or corner of nearly all windows. If you click on the **Help** tab, the Help system will open to the related topic. The **Help** tab must be enabled in **System Options**. Context-sensitive help is also available by pressing the **F1** key (sometimes in conjunction with the **FN** key).



12.3.2 Online Assistance

To obtain assistance from The Edge Support Team on-line:

1. Select **Help** ►**Online Assistance**. The **Online Assistance** wizard will appear in a browser window.



Welcome to The Edge online assistance

Online assistance is available between the hours of 9:00AM and 5:30PM Eastern, Monday through Friday, major holidays excluded.

Please call (877)844-0002 or email support@ajsllc.com before attempting to connect. Otherwise none of the technicians will pick up.

Help us help you. Our support technicians respond first to those requests that include both a ***store name*** and a clear description of your ***request***.

Store Name:

Phone # at your present location:

Your Name:

EDGE Feature: Choose One...

Request:

Example: *"Mailing. would like to send a postcard to call customers with Birthdays in the coming month".*

Please fill in all the fields above and then click the button to proceed.

2. Call or email in advance as indicated in the window.
3. Complete the fields as necessary to open a dialog.

12.3.3 Check for Updates

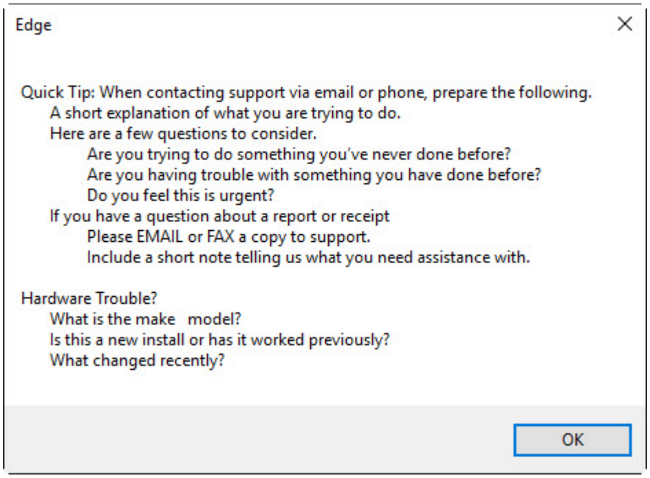
You can check for software updates on demand. To do so:

1. Select **Help ►Check for Updates**. The wizard will appear in a browser window.
2. A notification of available updates will appear.
3. Select the updates you wish to apply and select **OK**.
4. The updates will be applied.

12.3.4 Email Support

Help also contains a command to allow you to email The Edge customer support directly. To do so:

1. Select **Help ► Email Support**. You will be prompted to take appropriate notes in preparation for your correspondence.



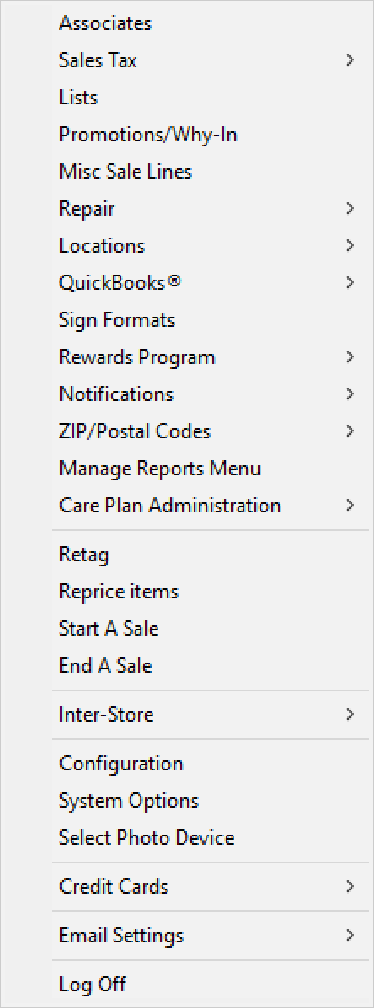
Quick Tip: When contacting support via email or phone, prepare the following.
    A short explanation of what you are trying to do.
    Here are a few questions to consider.
        Are you trying to do something you've never done before?
        Are you having trouble with something you have done before?
        Do you feel this is urgent?
    If you have a question about a report or receipt
        Please EMAIL or FAX a copy to support.
        Include a short note telling us what you need assistance with.

Hardware Trouble?
    What is the make   model?
    Is this a new install or has it worked previously?
    What changed recently?

2. Do so and select **OK**.
3. An email using your default email client will open already addressed to The Edge customer support and a version number in the subject heading.
4. Do not change the subject heading.
5. Enter your message and send.

13 Administrative Menu

Administrative on **The Edge Menu Bar** contains administrative options for The Edge that should not normally be accessed on a day-to-day basis or by store staff. It is used for management of associates, taxes, database items, the QuickBooks® interface, and marketing.



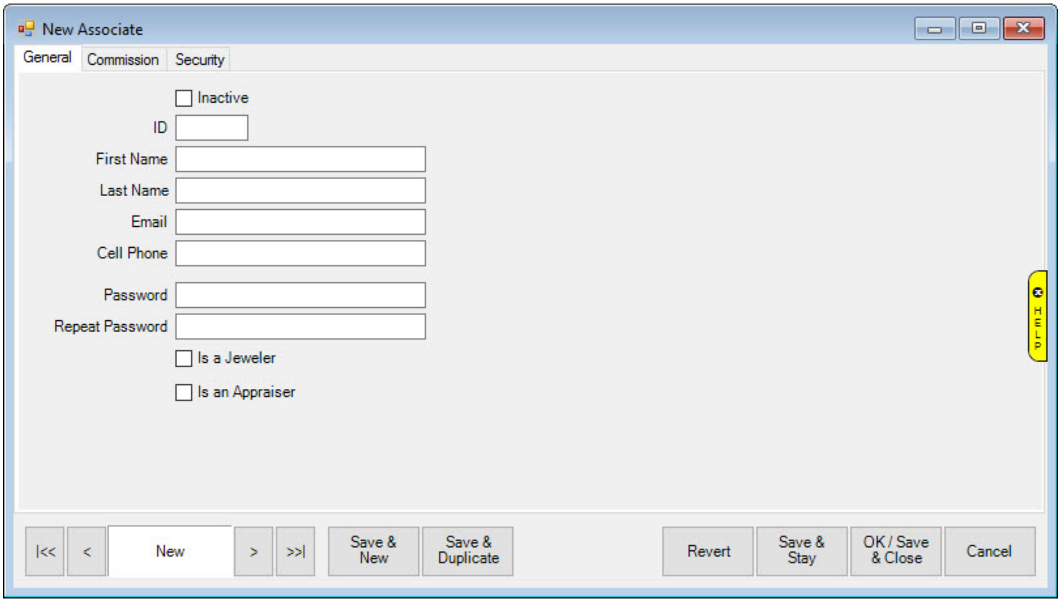
13.1 Managing Associates

You must identify your employees to The Edge before they can effectively use it. This will allow associates to automatically be credited with the appropriate commissions as well as track productivity. Reports concerning associate activities are described in the section entitled Commission Report.

13.1.1 Adding a New Associate

To add an associate:

1. Select **Administrative** ► **Associates**. The **Associates** window will appear with a list of current associates.
2. Select **Add**. The **New Associate** window will appear with the **General** tab selected.



Fields and options in the **General** tab include:

Inactive	Whether this associate is still actively employed with the company.
ID	The associate ID number as assigned when the associate is entered.
First Name	The associate's first name.
Last Name	The associate's last name.
Email	The associate's email; depending on **System Options**, this might appear on customer-facing materials.
Cell Phone	The associate's cell phone number; this will be used for text message notifications.

Password	The associate's password; required for access to certain password-protected functions.
Repeat Password	The password should be repeated to preclude errors.
Appraiser Details	If applicable, the associate's appraiser certification information.
Is a Jeweler	Indicates whether the associate is a jeweler who can make repairs.
Is an Appraiser	Indicates whether the associate is an appraiser.
Name as Printed	If **Is an Appraiser** is checked, the associate's name as it should appear on appraisals.
Credentials/Title	If **Is an Appraiser** is checked, credentials earned by the associate.

3. Complete fields in the **General** tab as appropriate. Notice that they may vary based on the associate's credentials.
4. Select the **Commission** tab and complete the fields as described in the section entitled Associate Commissions. Note that a commission must be entered, even if it is `0`.
5. Select the **Security** tab and complete the fields as described in the section entitled Security.
6. Select the appropriate save option from the **Record Navigation Bar**.

13.1.2 Editing an Associate's Record

To work with or edit an existing associate record:

1. Select **Administrative ► Associates**. The **Associates** window will appear with a list of current associates.

Tip!

Select Show Inactive Items to include associates who are not active in the list.

2. Select an associate's record and select **Edit** or double-click on the record. The **Edit Associate** window will appear with the **General** tab selected. See the section entitled Adding a New Associate for details on editing these fields.
3. Select the **Commission** tab to edit the fields as described in the section entitled Associate Commissions.
4. Select the **Security** tab to edit the fields as described in in the section entitled Security.
5. Select the appropriate save option from the **Record Navigation Bar**.

13.1.3 Associate Commissions

The Edge accommodates two types of commissions: percentage of total retail price or percentage of profit on sale. The percentage amount (10 percent, 20 percent, 30 percent, etc.) would be calculated according to the method chosen. When using the percentage of retail method, 10 percent of a $150 sale would return $15.

On the other hand, if we were paying 20 percent of gross profit, and a salesperson sold an item at retail at $150, the gross profit being $80, their commission would be $16. If they discounted the item to $100, their gross profit would be $30, and their commission would be $6.

Commission can be adjusted by assigning factors specified in the category and/or vendor definition. Each inventory category has a default commission adjustment of 100 percent. Anything less would thereby reduce the amount of commission paid, as set in commissions, on items sold. For instance, a commission adjustment of 50 percent would effectively cut the standard commission in half for items sold from that category; conversely a 200 percent adjustment would double the standard commission.

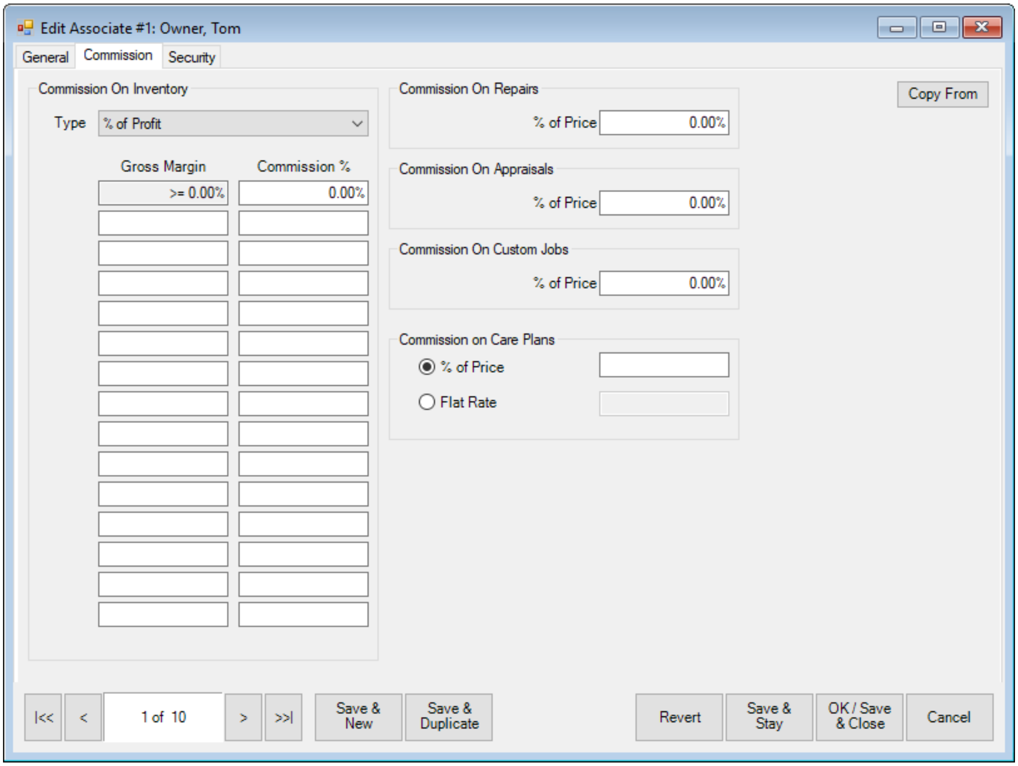
You should use only the Salesperson Commission Report to process sales commissions.

- **All inventory sales will be reported on the Commission Report regardless of value. A commission percentage must be entered in the Commission on Inventory area; 0 is a valid entry.**
- **Entering a value in Repairs, Appraisals and Custom Jobs is optional. However, there must be a value entered if they are to appear on the Commission Report.**

On layaways, repairs, special orders, custom jobs, and appraisals, commission is credited to the original intake associate regardless of who processes subsequent payments and pickups.

To set up commissions:

1. From the **Administrative** menu, select **Associates**. A list of associates will appear.
2. Select or add the associate with which you wish to work.
3. The associate's record will open. Select the **Commission** tab.



Commission On Inventory

Type: % of Profit

Gross Margin	Commission %
>= 0.00%	0.00%

Commission On Repairs: % of Price 0.00%

Commission On Appraisals: % of Price 0.00%

Commission On Custom Jobs: % of Price 0.00%

Commission on Care Plans

● % of Price

○ Flat Rate

Fields and options in the **Commission** tab include:

Type	Indicates the type of commission as described above.
Gross Margin/ Commission %	Indicates that, for items of various gross margins, the associate may receive different commission percentages. The default is for all of the margins to be at a static rate. You can use the other fields to indicate other ranges. In this example, the commission is paid on anything with a gross margin more than 0.

Use this option to set minimum levels of gross margin for which commission would apply.

Commission on Repairs	Indicates the commission the associate should receive based on the price of a repair.
Commission on Appraisals	Indicates the commission the associate should receive based on the price of an appraisal.
Commission on Custom Jobs	Indicates the commission the associate should receive based on the price of a repair.

Commission on Care Plans	Options are `% of Price`, which gives commission as a percentage of the price of the plan or `Flat Rate`, which gives a specified amount. For `% of Price`, set the percentage to give. For `Flat Rate`, set the dollar amount.
Copy From	Used to copy settings for the **Commission** tab from another associate record.

4. Complete the fields in the **Commission** tab as appropriate or use **Copy From** to populate the fields from another associate.
5. Select **Save & Stay** or **Okay/Save & Close** as required.

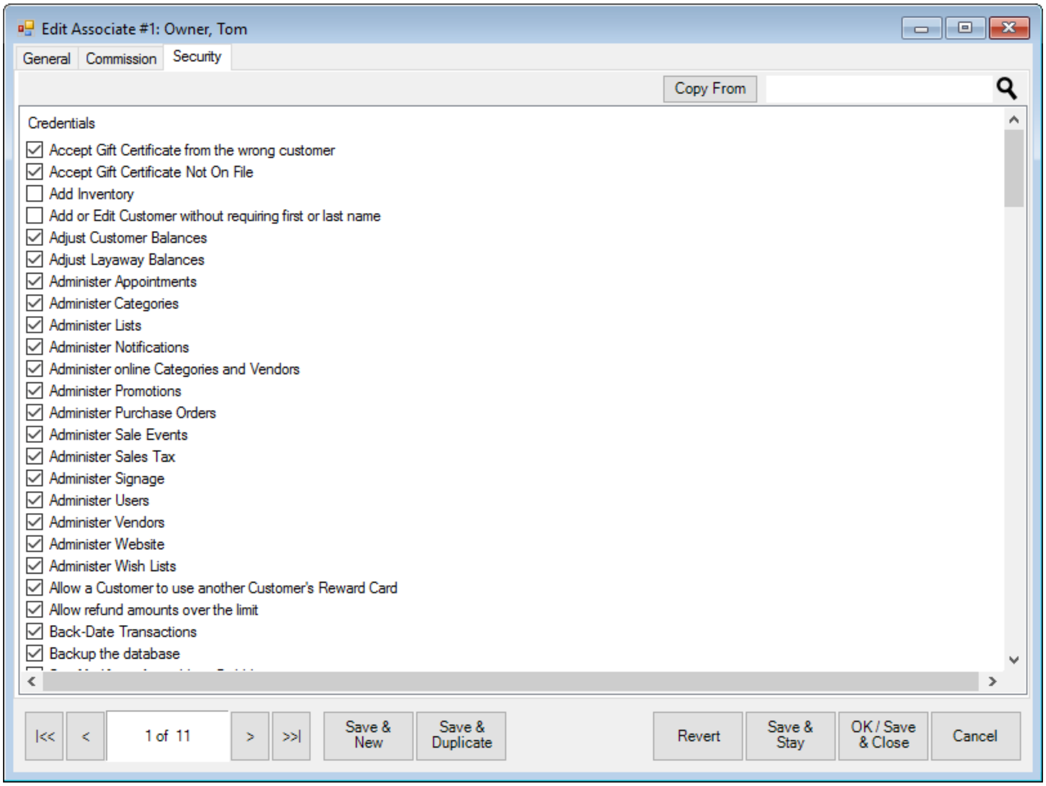
Commissions can be specified by category and vendor as well. See the sections entitled Adding a Category and Adding a Vendor.

13.1.4 Security

A list of all password-protected functions will be associated with every employee. Those employees that have permission to access a function will have that function checked. It is presumed that only the system administrator will have access to all users' records and will check the permissions boxes accordingly.

To work with security:

1. From the **Administrative** menu, select **Associates**. A list of associates will appear.
2. Select or add the associate with which you wish to work.
3. The associate's record will open. Select the **Security** tab.



Credentials

- ☑ Accept Gift Certificate from the wrong customer
- ☑ Accept Gift Certificate Not On File
- ☐ Add Inventory
- ☐ Add or Edit Customer without requiring first or last name
- ☑ Adjust Customer Balances
- ☑ Adjust Layaway Balances
- ☑ Administer Appointments
- ☑ Administer Categories
- ☑ Administer Lists
- ☑ Administer Notifications
- ☑ Administer online Categories and Vendors
- ☑ Administer Promotions
- ☑ Administer Purchase Orders
- ☑ Administer Sale Events
- ☑ Administer Sales Tax
- ☑ Administer Signage
- ☑ Administer Users
- ☑ Administer Vendors
- ☑ Administer Website
- ☑ Administer Wish Lists
- ☑ Allow a Customer to use another Customer's Reward Card
- ☑ Allow refund amounts over the limit
- ☑ Back-Date Transactions
- ☑ Backup the database

4. Select the options required for this associate or use **Copy From** to populate security credentials from another associate.
5. Select **Save & Stay** or **OK/Save & Close**.

- **Be aware that when a user has permission to administer users, they will then be able to set the password and permissions for every person in the store.**
- **User permissions may change if updates are installed or other changes are made to the system. All new permissions will be unchecked. Turn these on manually after system changes are complete. Sometimes a new permission restricts an operation that was previously uncontrolled. In this case, users will find that they can no longer perform that operation unless the supervisor grants them the new permission.**

13.2 Managing Sales Tax

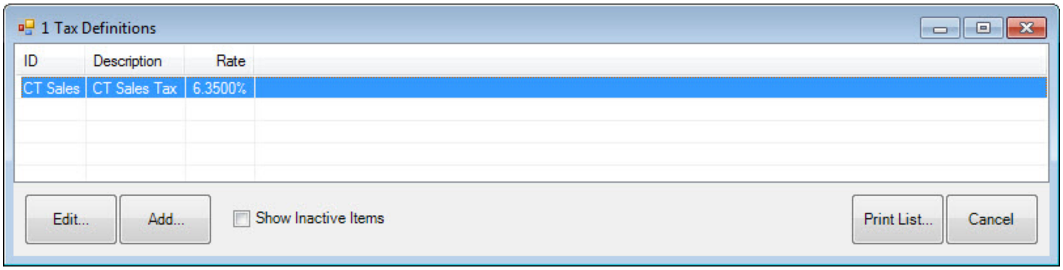
Each location has unique tax requirements. The Edge will allow you to set the tax conditions required by jurisdictions at your location. You may need several tax definitions for one tax jurisdiction to accommodate requirements for things like luxury taxes or exempt items.

If tax rates change, we recommend that you do not edit an existing tax rate, but give the existing tax rate an expiration date and create a new tax with a starting effective date.

13.2.1 Tax Definitions

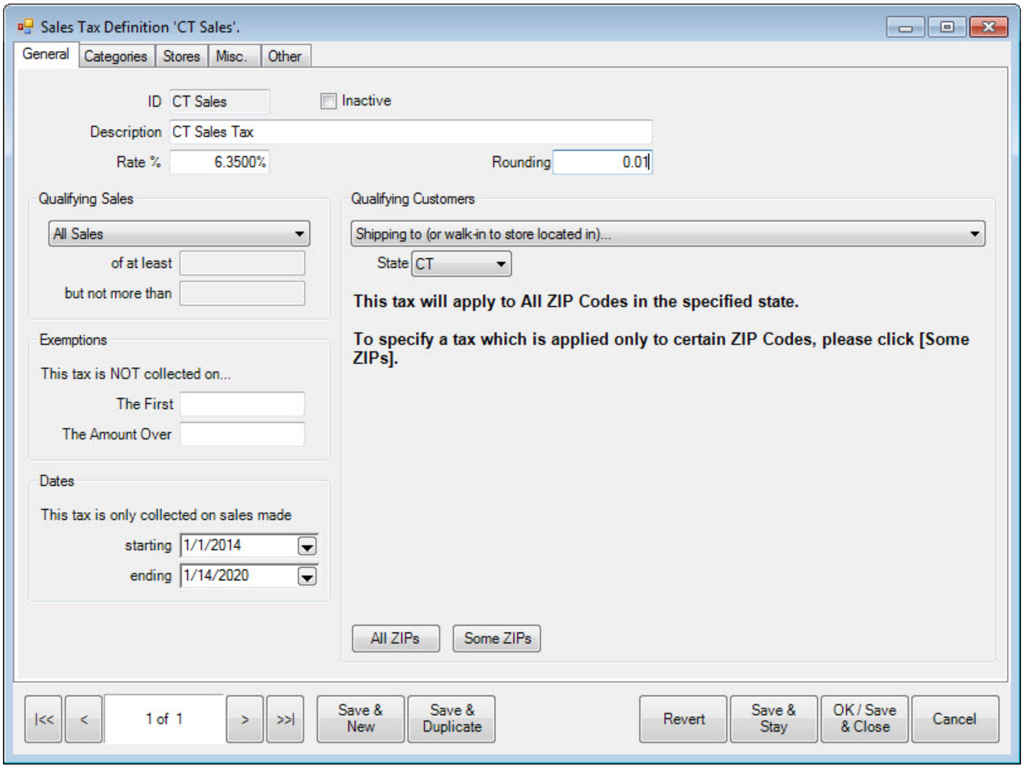
To set up and edit tax definitions:

1. Select **Sales Tax** from the **Administrative** menu.
2. Select **Tax Definitions**. The **Tax Definitions** window will appear.



ID	Description	Rate
CT Sales	CT Sales Tax	6.3500%

3. To add a new tax, select **Add**. The **New Sales Tax Definition** window will appear with the **General** tab presented. To edit a tax definition, select **Edit**. The same window will appear, but will already be populated with data to edit.



Sales Tax Definition 'CT Sales'.

ID: CT Sales

☐ Inactive

Description: CT Sales Tax

Rate %: 6.3500%

Rounding: 0.01

Qualifying Sales: All Sales

of at least:

but not more than:

Exemptions

This tax is NOT collected on...

The First:

The Amount Over:

Dates

This tax is only collected on sales made

starting: 1/1/2014

ending: 1/14/2020

Qualifying Customers: Shipping to (or walk-in to store located in)...

State: CT

This tax will apply to All ZIP Codes in the specified state.

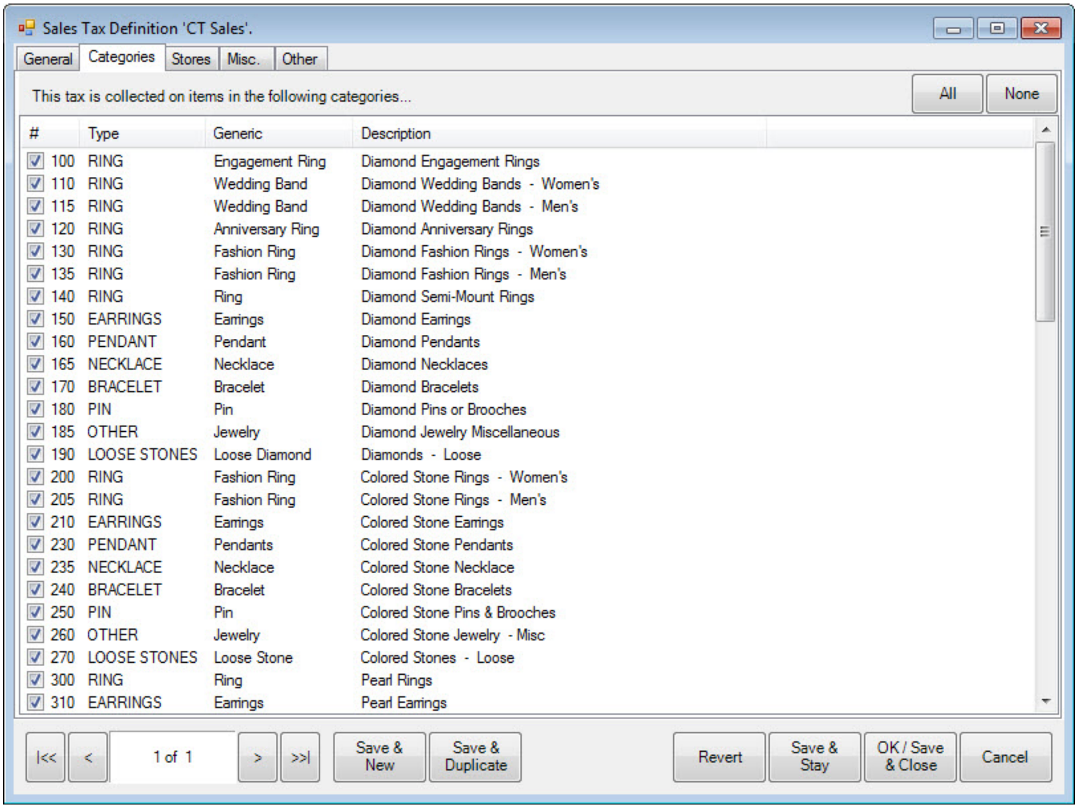
To specify a tax which is applied only to certain ZIP Codes, please click [Some ZIPs].

Fields and options in the **General** tab include:

ID	The identification for the tax. This can be a number or short descriptor.
Inactive	Indicates whether the tax is currently applicable.
Description	A detailed description of the tax.
Rate %	The percentage of sales to be collected.
Rounding	To what decimal tax calculations should be rounded.
Qualifying Sales	Allows you to define taxes based on prices or sales amounts. There are three categories, all of which offers different options for values: • **All**: All sales will be taxed at the rate specified. • **Item**: Specify a price range to be taxed on an item-by-item basis. For example, items of $0–$5,000 might not have this tax. Items of $5,000 and over might have it. If you want items over a certain amount, enter a value for **of at least** but leave **but not more than** blank. This is an example of how one jurisdiction might require more than one tax definition. • **Sales Totaling**: This is used just like **Item**, but only if the total sale drives the tax rate.

Qualifying Customers	Allows you to specify certain categories of customers for whom the tax should be collected. The most common example would be the collection of tax for customers shipping within the state, but excluding tax on shipments to out of state destinations. This is set by using the **Shipping to (or walk into store located)** option. It can also be refined by ZIP Code for shipping. If you have selected **Shipping to**, the **All ZIPs** and Some **ZIPs** options will appear.	
Exemptions	Allows you to specify sales amounts for which the tax should not be collected. This is only item-by-item regardless of qualifying sales. This might be used in conjunction with **Qualifying Sales** and a number of tax definitions to layer progressive taxes. The exemption will apply as specified:	
	The First	Tax will not be collected on the portion of the sale below this amount.
	The Amount Over	Tax will not be collected on the portion of the sale above this amount.
Dates	Allows you to specify that the tax must only be collected during certain time frames. Be sure that if you have an expiring tax definition, that a new one will begin afterword.	
	Starting	Date to start collecting the tax.
	Ending	Last date to collect the tax.

4. Complete the **General** tab fields as applicable.
5. Select the **Categories** tab.

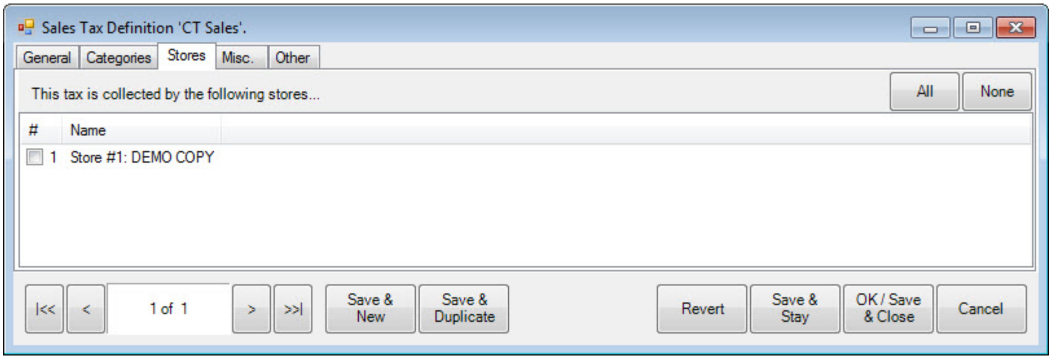


This tax is collected on items in the following categories...

#	Type	Generic	Description
☑ 100	RING	Engagement Ring	Diamond Engagement Rings
☑ 110	RING	Wedding Band	Diamond Wedding Bands - Women's
☑ 115	RING	Wedding Band	Diamond Wedding Bands - Men's
☑ 120	RING	Anniversary Ring	Diamond Anniversary Rings
☑ 130	RING	Fashion Ring	Diamond Fashion Rings - Women's
☑ 135	RING	Fashion Ring	Diamond Fashion Rings - Men's
☑ 140	RING	Ring	Diamond Semi-Mount Rings
☑ 150	EARRINGS	Earrings	Diamond Earrings
☑ 160	PENDANT	Pendant	Diamond Pendants
☑ 165	NECKLACE	Necklace	Diamond Necklaces
☑ 170	BRACELET	Bracelet	Diamond Bracelets
☑ 180	PIN	Pin	Diamond Pins or Brooches
☑ 185	OTHER	Jewelry	Diamond Jewelry Miscellaneous
☑ 190	LOOSE STONES	Loose Diamond	Diamonds - Loose
☑ 200	RING	Fashion Ring	Colored Stone Rings - Women's
☑ 205	RING	Fashion Ring	Colored Stone Rings - Men's
☑ 210	EARRINGS	Earrings	Colored Stone Earrings
☑ 230	PENDANT	Pendants	Colored Stone Pendants
☑ 235	NECKLACE	Necklace	Colored Stone Necklace
☑ 240	BRACELET	Bracelet	Colored Stone Bracelets
☑ 250	PIN	Pin	Colored Stone Pins & Brooches
☑ 260	OTHER	Jewelry	Colored Stone Jewelry - Misc
☑ 270	LOOSE STONES	Loose Stone	Colored Stones - Loose
☑ 300	RING	Ring	Pearl Rings
☑ 310	EARRINGS	Earrings	Pearl Earrings

The **Categories** tab allows you to select categories of items for which the tax should be collected.

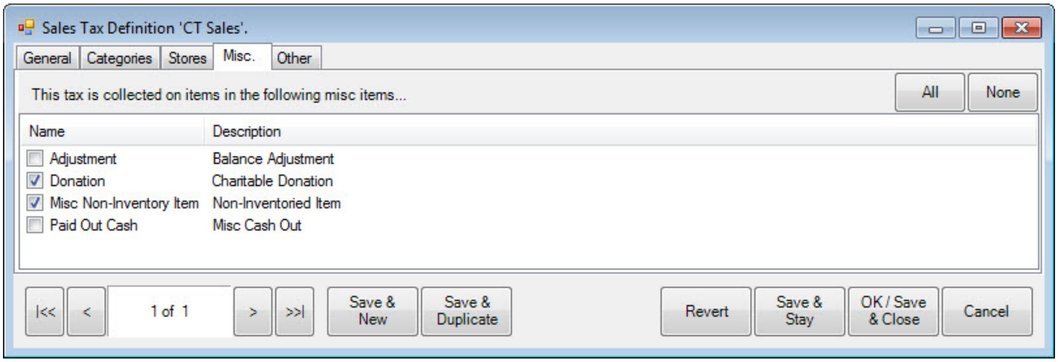
6. Select the desired categories.
7. Select the **Stores** tab.



This tax is collected by the following stores...

#	Name
☐ 1	Store #1: DEMO COPY

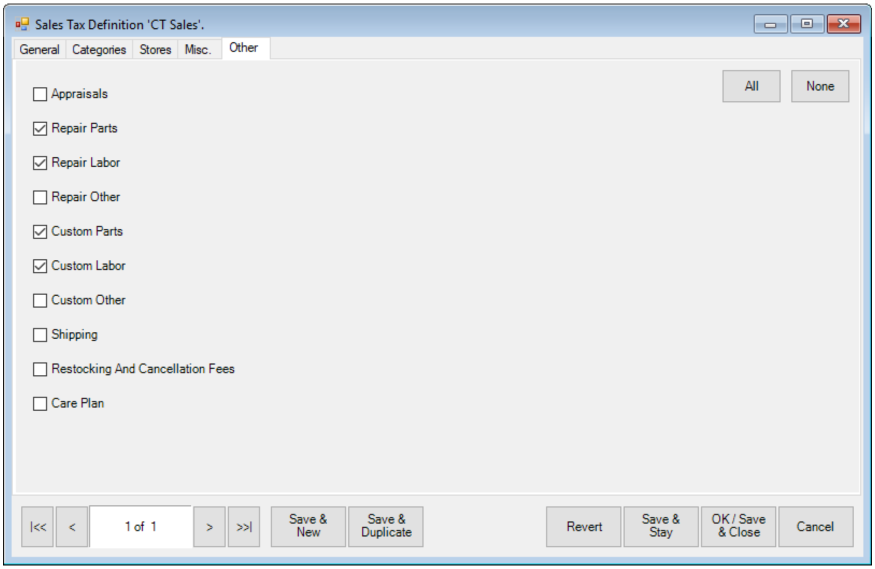
8. Indicate which stores will be required to collect the tax.
9. Select the **Misc** tab.



This tax is collected on items in the following misc items...

Name	Description
☐ Adjustment	Balance Adjustment
☑ Donation	Charitable Donation
☑ Misc Non-Inventory Item	Non-Inventoried Item
☐ Paid Out Cash	Misc Cash Out

10. Indicate those miscellaneous items for which the tax must be collected.
11. Select the **Other** tab.



☐ Appraisals
☑ Repair Parts
☑ Repair Labor
☐ Repair Other
☑ Custom Parts
☑ Custom Labor
☐ Custom Other
☐ Shipping
☐ Restocking And Cancellation Fees
☐ Care Plan

12. Indicate those services and repair items for which the tax should be collected.
13. Select the appropriate save option from the **Record Navigation Bar**.

Example:
Suppose you have a jurisdiction with a standard 6% sales tax on all items and a luxury tax of 8% that applies to any item costing more than $5,000 and is applied to only the amount over $5,000:

1. Create a tax definition for items at 6% with no exemptions.
2. Create a second tax definition for items over $5,000 at 2%.

13.2.2 Tax on Services

Through this function, you can apply taxes to services rather than assign services to types of taxes. For each type of service, select the tax definition to be applied.

If the law changes concerning taxes on services in your state, be sure you double check tax applicability and rates at point of sale. If tax law changes are extensive, you may need to cancel and reenter each open transaction. This applies primarily to layaways. For special orders, custom jobs, and repairs, the tax due is typically applied when the customer takes possession, i.e., on final pickup. Any tax shown on the order at intake is estimated.

13.2.3 Shipping Tax Import Wizard

13.2.3.1 Important Information

The **Shipping Tax Import Wizard** can be used the import the free tax tables provided by Avalara™. Please read these important notes before proceeding.

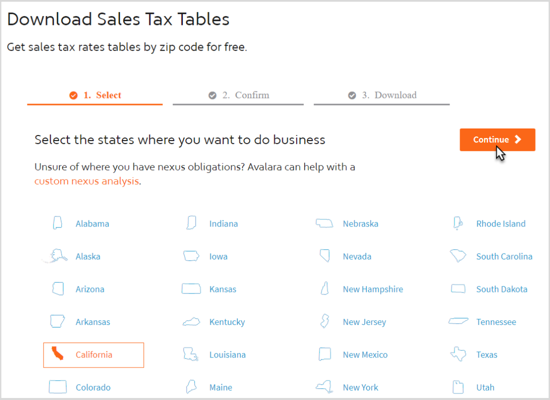
- This is only designed to import taxes for states you ship to. Your "home" state taxes, which may include special rules or luxury taxes, should still be set up manually.
- Consult a tax professional for assistance in determining sales tax obligations and applicable sales tax rates.
- Avalara's tax tables provide tax rates by ZIP code and include city, state, district, and special taxes. **This may not be appropriate for all states. Some states only require state tax be charged on shipped purchases. Consult a professional for assistance in determining which rates apply per state.**
- Importing many tax tables can impact the amount of time it takes to open POS. This is especially true if you are accessing The Edge remotely, such as a multi-store setup sharing a database through a VPN, WAN, or cloud storage solution.
- **Make a database backup before importing any tax tables**.

13.2.3.2 Download Tax Tables

Avalara™ tax tables are available online for free. You can download multiple states at once, but each state will be a separate table that must be imported individually.

To download:

1. Navigate to the download site: https://www.avalara.com/taxrates/en/download-tax-tables.html
2. Select one or more states and click **Continue**.



Download Sales Tax Tables

Get sales tax rates tables by zip code for free.

Select the states where you want to do business

Unsure of where you have nexus obligations? Avalara can help with a custom nexus analysis.

Alabama
Alaska
Arizona
Arkansas
California
Colorado
Indiana
Iowa
Kansas
Kentucky
Louisiana
Maine
Nebraska
Nevada
New Hampshire
New Jersey
New Mexico
New York
Rhode Island
South Carolina
South Dakota
Tennessee
Texas
Utah

3. On the **Confirm** tab, you must enter your name and email. This is important; when tax tables are updated, you will receive an email so you can download and re-import the new rates.
4. Click **Download rate tables** and allow the download to complete. By default, these will save to your **Downloads** folder under the filename **TAXRATES_ZIP5.**

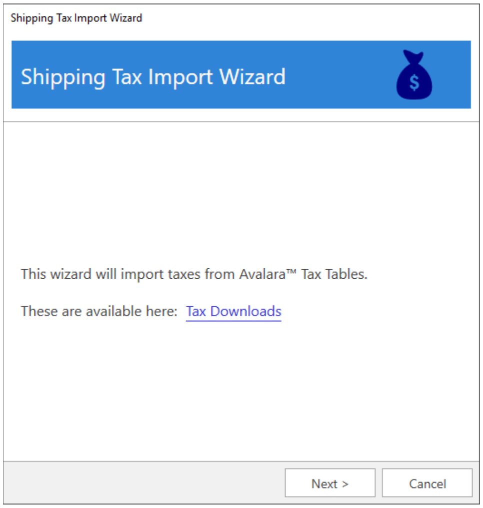
To extract (unzip):

1. Navigate to the folder where you saved the file (default is **Downloads** folder).
2. Right click on the downloaded file (TAXRATES_ZIP5), then left click on **Extract All**.
3. Choose the path where you would like to extract these files, e.g. **Desktop**.
4. Note where you extracted the files – you will need to find this path when you import.

13.2.3.3 Import Tax Tables

Make sure you extracted (unzipped) the downloaded file before proceeding. To import a tax table:

1. In The Edge, click on **Administrative > Sales Tax > Shipping Tax Import Wizard.**



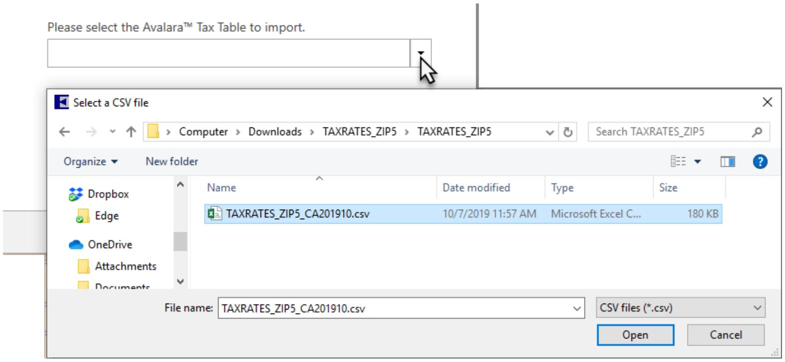
Shipping Tax Import Wizard

Shipping Tax Import Wizard

This wizard will import taxes from Avalara™ Tax Tables.

These are available here: Tax Downloads

2. Click **Next**. Use the drop-down to navigate to the path of the extracted tax table. Select the file to import and click **Open**.



Please select the Avalara™ Tax Table to import.

Select a CSV file

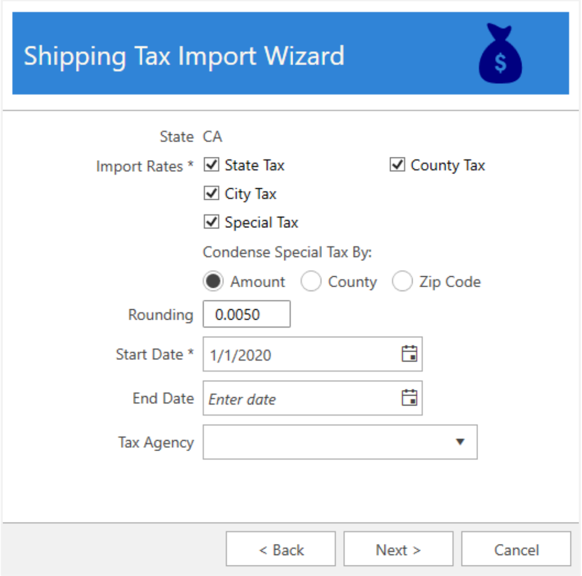
Computer › Downloads › TAXRATES_ZIP5 › TAXRATES_ZIP5

Name	Date modified	Type	Size
TAXRATES_ZIP5_CA201910.csv	10/7/2019 11:57 AM	Microsoft Excel C...	180 KB

File name: TAXRATES_ZIP5_CA201910.csv

CSV files (*.csv)

3. Choose which **Rates** (State, City, County, Special) to import and set import options, then click **Next**.



Shipping Tax Import Wizard

State CA

Import Rates * ☑ State Tax ☑ County Tax

☑ City Tax

☑ Special Tax

Condense Special Tax By:

● Amount ○ County ○ Zip Code

Rounding 0.0050

Start Date * 1/1/2020

End Date *Enter date*

Tax Agency

<table>
<tr><td rowspan="4">Condense Special Tax By</td><td colspan="2">Some tax tables include special tax rates. These can be things like district taxes, stadium taxes, etc. If present, this option defines how to add them.</td></tr>
<tr><td>Amount</td><td>Special taxes of the same amount will be condensed to a single definition.</td></tr>
<tr><td>County</td><td>Special taxes for the same county will be condensed to a single definition.</td></tr>
<tr><td>Zip Code</td><td>Special taxes for the same ZIP code will be condensed to a single definition.</td></tr>
<tr><td>Rounding</td><td colspan="2">Defines threshold at which partial change gets rounded up. The default is 0.0050, e.g. $1.005 would round up to $1.01 while $1.004 would round down to $1.00.</td></tr>
<tr><td>Start / End Date</td><td colspan="2">Dates these taxes will be effective.</td></tr>
<tr><td>Tax Agency</td><td colspan="2">For QuickBooks, the tax agency to assign these to.</td></tr>
</table>

4. Select which **Categories** these taxes will apply to, then click **Next.**
5. Choose which **Services** and **Stores** these taxes will apply to, then click **Next**.
6. Choose which **Miscellaneous Items** these taxes will apply to, then click **Import Taxes** to complete the import process.
7. You must restart The Edge before these changes take effect.

13.3 Lists

Lists are used throughout The Edge to present the user with predefined choices for certain selection menus. In addition, lists are used to setup and customize stones and related information (clarity, color, etc.) By default, The Edge populates these lists with common entries. To further tailor The Edge to meet the needs of your store, we highly recommend you examine these lists and make the necessary changes to accommodate your needs.

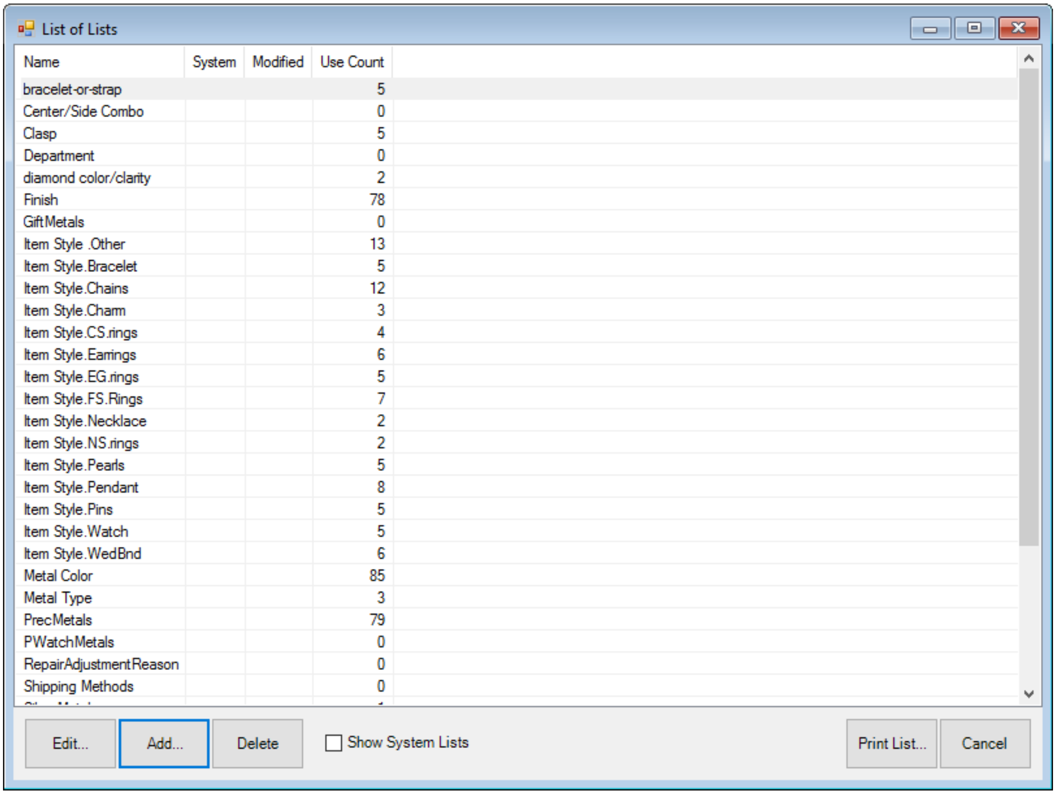
13.3.1 Item Details Lists

The Edge contains lists that populate drop-down menus, for example on the **Details** tab of category setup for each category. For example, a category may contain a detail named **Metal** with a detail type of **PrecMetals**. When an item is entered into this category, it will contain a detail field named **Metal** with a drop-down menu containing the predefined choices. These predefined choices are pulled directly from the **PrecMetals** list. The Edge knows to use this list because it is defined as the **Detail Type** for the detail **Metal**.

Any custom list that you create will show up as an available **Detail Type** for any detail in any category. We recommend that you use lists were applicable to standardize the inventory process. This is especially helpful if you have multiple associates entering inventory as it keeps them consistent. Other management might include reordering lists according to your usage, i.e., the items in the list will appear in the drop-down menus in that order, so if you use a certain kind of item value a lot, you might order it near the top of the system list.

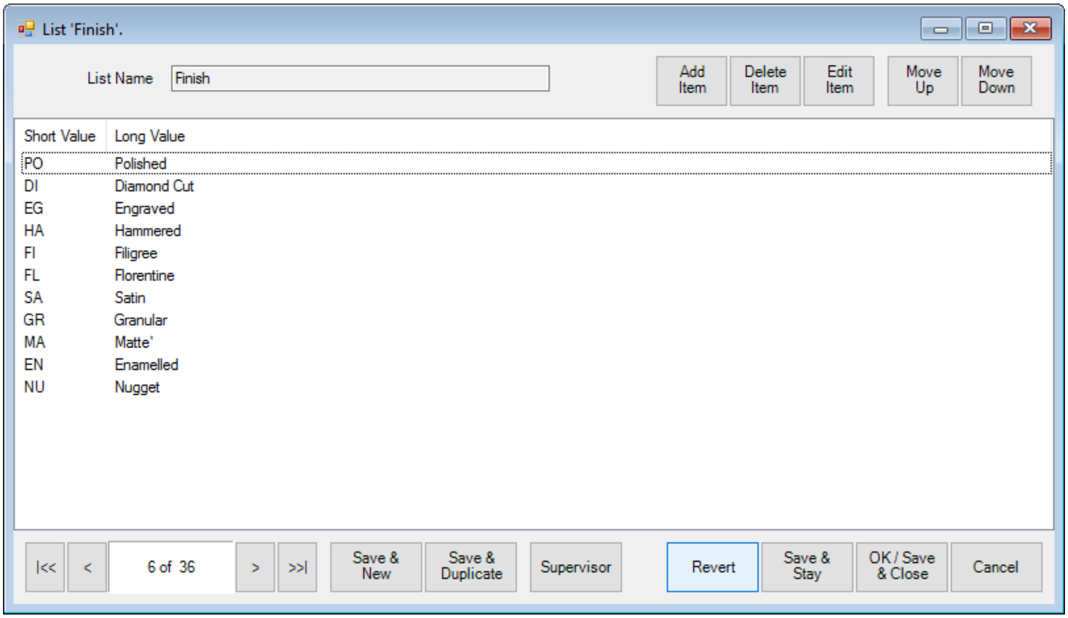
You will usually be working with an existing list. To do so:

1. Select **Administrative ► Lists**. The **List of Lists** window will appear.



Name	System	Modified	Use Count
bracelet-or-strap			5
Center/Side Combo			0
Clasp			5
Department			0
diamond color/clarity			2
Finish			78
GiftMetals			0
Item Style .Other			13
Item Style.Bracelet			5
Item Style.Chains			12
Item Style.Charm			3
Item Style.CS.rings			4
Item Style.Earrings			6
Item Style.EG.rings			5
Item Style.FS.Rings			7
Item Style.Necklace			2
Item Style.NS.rings			2
Item Style.Pearls			5
Item Style.Pendant			8
Item Style.Pins			5
Item Style.Watch			5
Item Style.WedBnd			6
Metal Color			85
Metal Type			3
PrecMetals			79
PWatchMetals			0
RepairAdjustmentReason			0
Shipping Methods			0

2. Select the list with which you wish to work and select **Edit**. The **List** record will appear.



List Name: Finish

Short Value	Long Value
PO	Polished
DI	Diamond Cut
EG	Engraved
HA	Hammered
FI	Filigree
FL	Florentine
SA	Satin
GR	Granular
MA	Matte'
EN	Enamelled
NU	Nugget

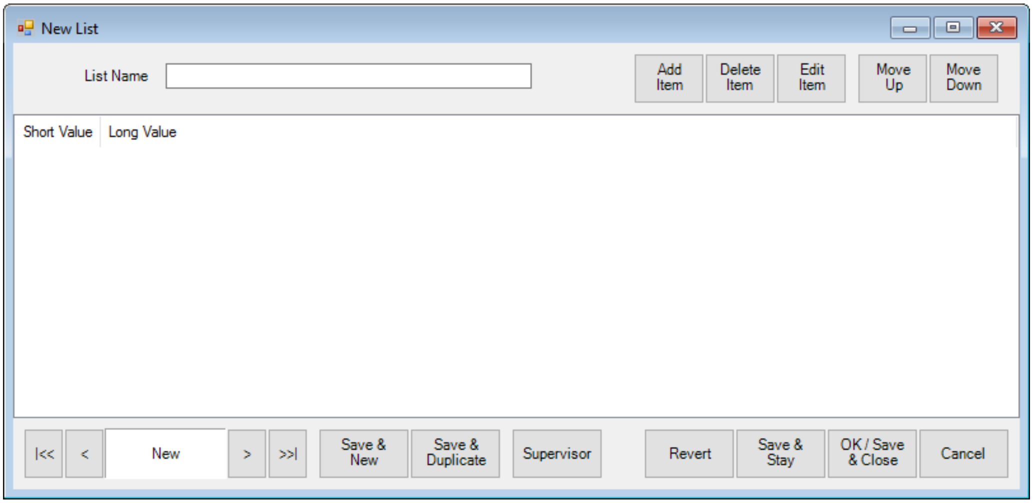
Fields and options in the **List** record include:

Add Item	Used to add a value to the drop-down list.
Delete Item	Used to delete a value from the drop-down list.
Edit Item	Used to edit a value.
Move Up	Used to move a value up in the list. This will make it appear higher in the drop-down list.
Move Down	Used to move a value down in the list. This will make it appear lower in the drop-down list.

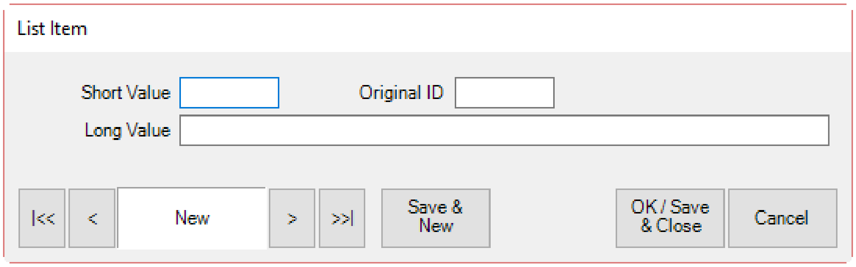
3. Select a **Save** option.

To create a new list:

4. Select **Administrative ► Lists**. The **List of Lists** window will appear.
1. Select **Add**. The **New List** window will appear.



2. In the **List Name** field, enter a meaningful name for the list.
3. For each value to be included in the list, select **Add Item**. The **List Item** window will appear.



4. Enter a **Short Value**, which is analogous to a key or short cut.
5. Create an **Original ID**, which is a unique identifier. This can be the same as the short value.
6. Enter a **Long Value**, which is a more descriptive list value name. The long value is what shows on the screen.
7. Select **Save & New** to add more list values or **OK/Save & Close** if you are done adding values.
8. Be sure to go to the category record, **Category Details** tab and select the new list for a **Detail Type**.

13.3.2 System Lists

There are several other lists that are defined as **System Lists**. These default to The Edge's commonly used options. We do not recommend modifying the short value of any record on the System List without consulting The Edge Support Team.

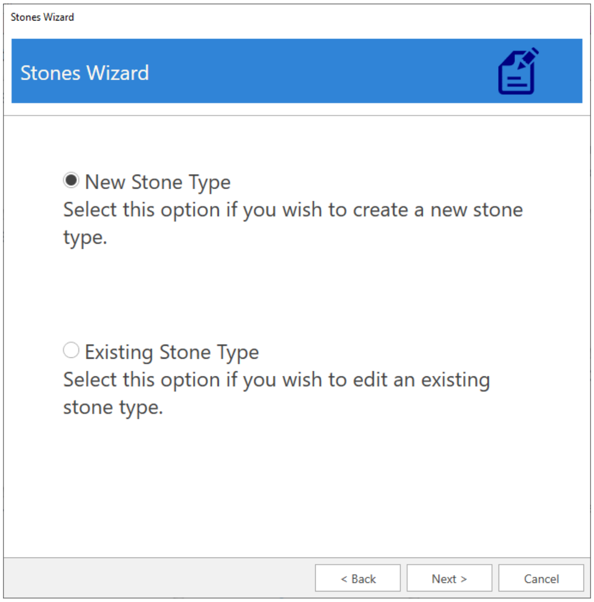
13.3.3 Stone Lists

Stone lists allow you to customize the stones and attributes displayed when adding stones to item records. This is managed using the **Stones Wizard**.

13.3.3.1 Create New Stone Type

To use the wizard to add a new stone:

1. Click **Inventory** > **Stones** > **Wizard**.
2. Click **Next.**

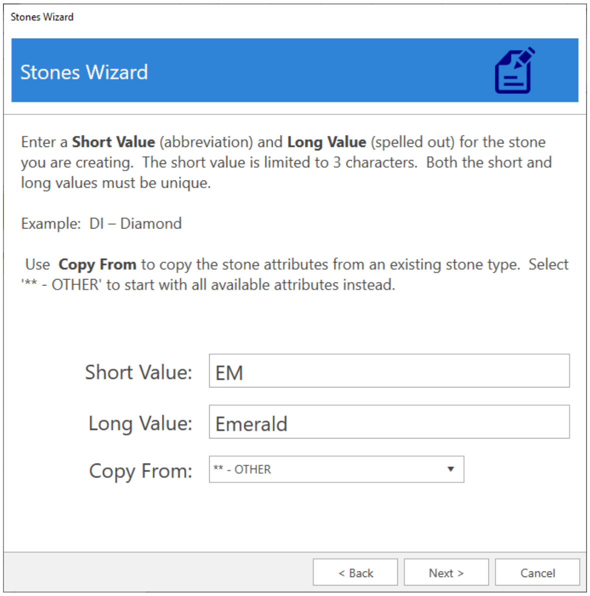


● New Stone Type
Select this option if you wish to create a new stone type.

○ Existing Stone Type
Select this option if you wish to edit an existing stone type.

3. Select **New Stone Type** and click **Next.**

4. Enter a **Short Value** and **Long Value** for your stone.



Stones Wizard

Stones Wizard

Enter a **Short Value** (abbreviation) and **Long Value** (spelled out) for the stone you are creating. The short value is limited to 3 characters. Both the short and long values must be unique.

Example: DI – Diamond

Use **Copy From** to copy the stone attributes from an existing stone type. Select '** - OTHER' to start with all available attributes instead.

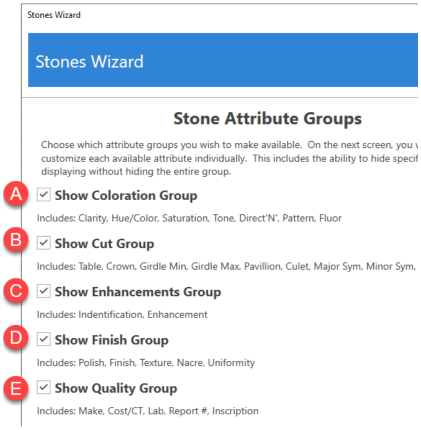
Short Value: EM

Long Value: Emerald

Copy From: ** - OTHER

5. Use the **Copy From** drop-down to specify an existing stone to copy details from. To start with all available fields, select '** - Other'. Then click **Next**.
6. Stone attributes are split into six groups. You can uncheck a group to stop it from showing up. Select the groups you wish to display, then click **Next**.

Wizard



Stones Wizard

Stones Wizard

Stone Attribute Groups

Choose which attribute groups you wish to make available. On the next screen, you w customize each available attribute individually. This includes the ability to hide specif displaying without hiding the entire group.

A ☑ **Show Coloration Group**

Includes: Clarity, Hue/Color, Saturation, Tone, Direct'N', Pattern, Fluor

B ☑ **Show Cut Group**

Includes: Table, Crown, Girdle Min, Girdle Max, Pavillion, Culet, Major Sym, Minor Sym,

C ☑ **Show Enhancements Group**

Includes: Indentification, Enhancement

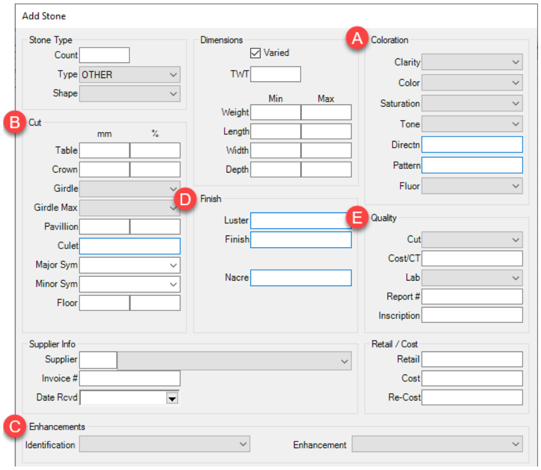
D ☑ **Show Finish Group**

Includes: Polish, Finish, Texture, Nacre, Uniformity

E ☑ **Show Quality Group**

Includes: Make, Cost/CT, Lab, Report #, Inscription

Add Stone Form



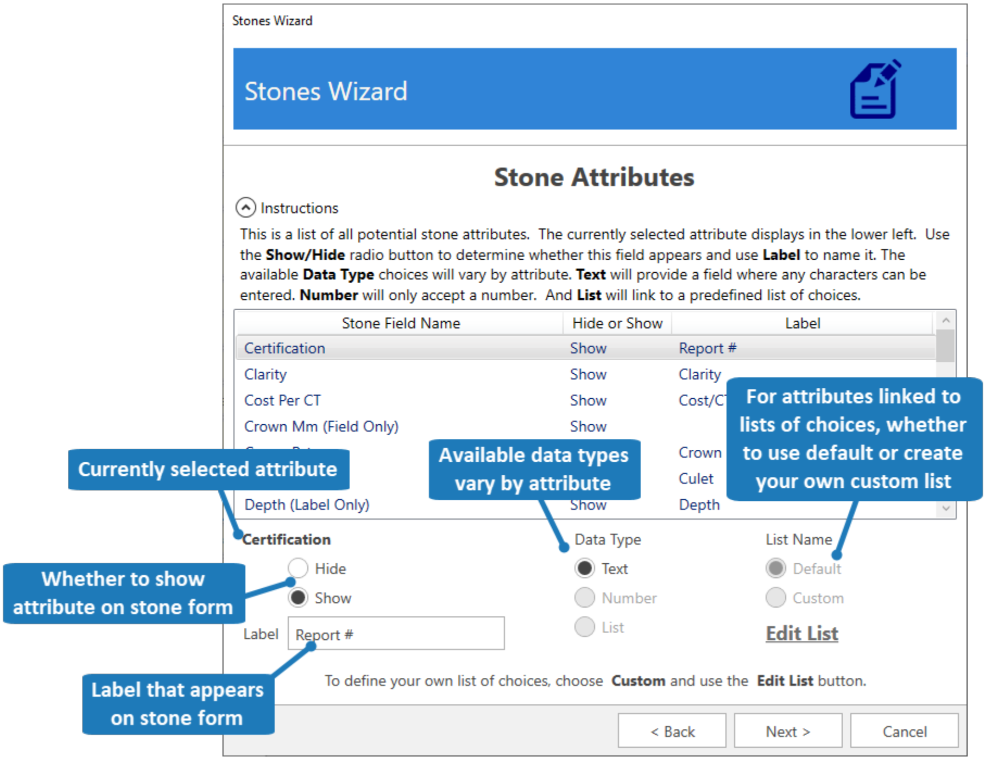
Add Stone

Type: OTHER

☑ Varied

7. This screen allows you to customize the individual stone attributes.

8. Available **Data Types** vary by attribute. **Text** provides a field that accepts any characters, **Number** provides a field that only accepts numbers, and **List** links to a list of predefined choices.



Stone Attributes

Instructions

This is a list of all potential stone attributes. The currently selected attribute displays in the lower left. Use the **Show/Hide** radio button to determine whether this field appears and use **Label** to name it. The available **Data Type** choices will vary by attribute. **Text** will provide a field where any characters can be entered. **Number** will only accept a number. And **List** will link to a predefined list of choices.

Stone Field Name	Hide or Show	Label
Certification	Show	Report #
Clarity	Show	Clarity
Cost Per CT	Show	Cost/C
Crown Mm (Field Only)	Show	
		Crown
		Culet
Depth (Label Only)	Show	Depth

Certification

○ Hide
● Show

Label: Report #

Data Type
● Text
○ Number
○ List

List Name
● Default
○ Custom

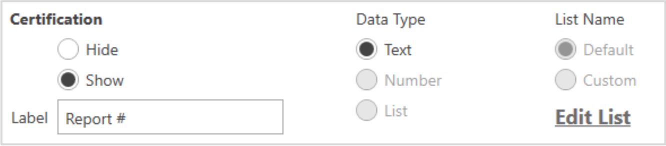
To define your own list of choices, choose **Custom** and use the **Edit List** button.

9. Make desired changes, then click **Next** and **Finish** to save your changes.

13.3.3.2 Working with Stone Attributes

Each stone attribute has a **Data Type**. This defines how it appears when adding stones. For example, **Certification** will display on the stone form as **Report #** and will have a **Text** box that accepts any input.

Wizard



Certification

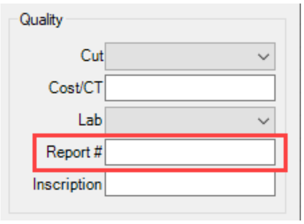
○ Hide
● Show

Label: Report #

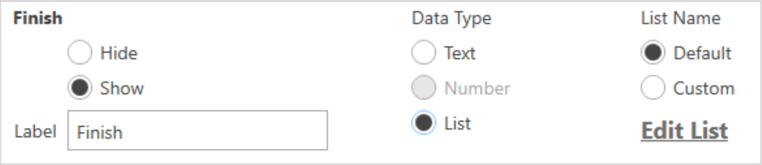
Data Type
● Text
○ Number
○ List

List Name
● Default
○ Custom

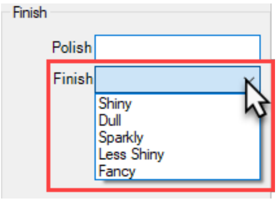
Stone Form



Some attributes will give you the option of changing **Data Type**. For example, **Finish** can either be a **Text** box or linked to a **List**.



Finish
○ Hide
● Show
Label: Finish
Data Type: ○ Text ○ Number ● List
List Name: ● Default ○ Custom



And some attributes are hardcoded to only accept **Numbers**.

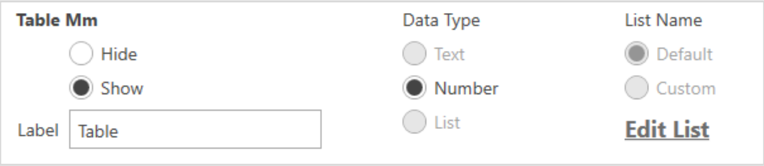
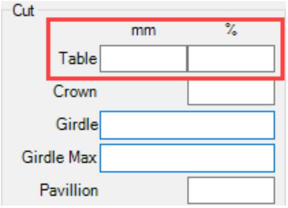


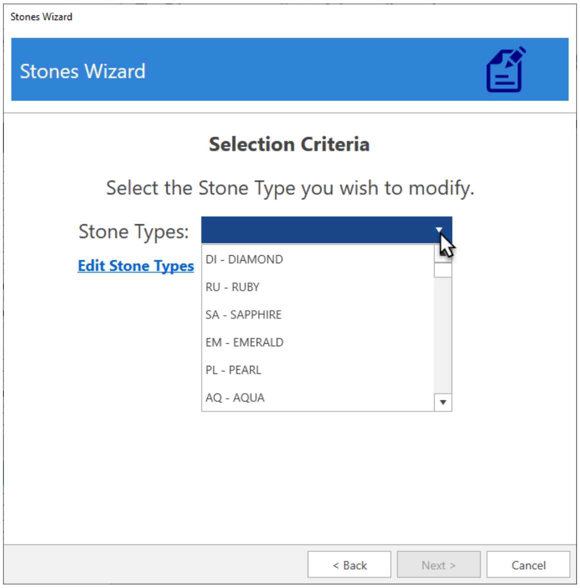
Table Mm
○ Hide
● Show
Label: Table
Data Type: ○ Text ● Number ○ List
List Name: ● Default ○ Custom



13.3.3.3 Editing Existing Stones

To use the wizard to update existing stones:

1. Click **Inventory** > **Stones** > **Wizard**.
2. Click **Next**.
3. Select **Existing Stone Type** and click **Next.**



Stones Wizard

Selection Criteria

Select the Stone Type you wish to modify.

Stone Types:
DI - DIAMOND
RU - RUBY
SA - SAPPHIRE
EM - EMERALD
PL - PEARL
AQ - AQUA

4. Use the drop-down to choose the stone you wish to edit. The **Edit Stone Types** link will let you change the short value, long value, and order these appear.

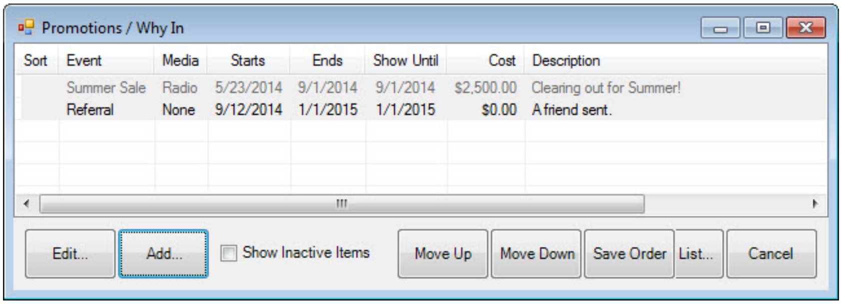
The remaining steps of the wizard are the same as creating a new stone. Refer to Step 6 in the previous section.

13.4 Promotions/Why In

The **Promotions/Why In** feature helps track the results of advertising and other promotional activity. This function is based on the interface's **Why In** field. This section describes how to define the wording that will appear in that drop-down list.

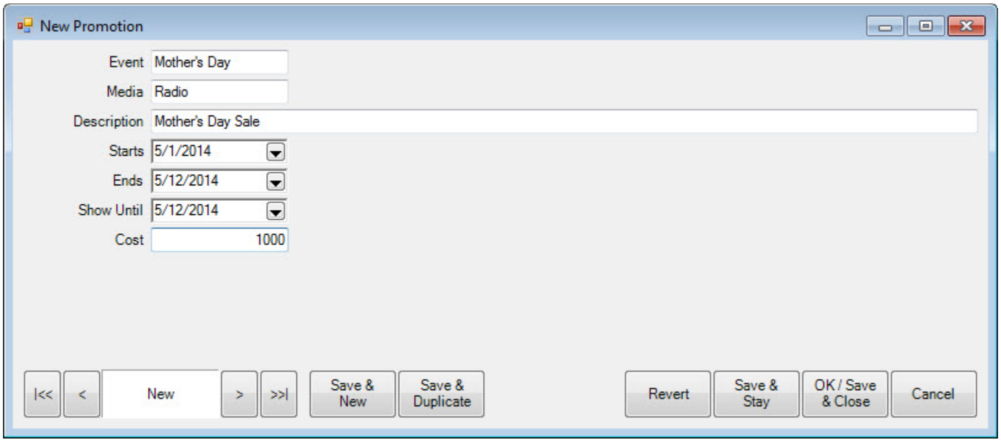
To work with **Promotions**:

1. Select **Administrative ► Promotions/Why In**. The **Promotions/Why In** window will appear.



Sort	Event	Media	Starts	Ends	Show Until	Cost	Description
	Summer Sale	Radio	5/23/2014	9/1/2014	9/1/2014	$2,500.00	Clearing out for Summer!
	Referral	None	9/12/2014	1/1/2015	1/1/2015	$0.00	A friend sent.

2. To add a new promotion record, select **Add**. The **New Promotion** window will appear. To edit a promotion record, select it and select **Edit**.



Event: Mother's Day
Media: Radio
Description: Mother's Day Sale
Starts: 5/1/2014
Ends: 5/12/2014
Show Until: 5/12/2014
Cost: 1000

The data fields and options for both functions include:

ID	The ID number for the promotion.
Event / Promotion	The name of the promotional event generating the traffic.
Media	The proper name of the medium used to promote the event.

Description	A more detailed description of the event.

For a particular event, you'll want to add a promotion for each ad taken to promote it. Therefore, when a customer comes in and responds to the Why In question, you'll have a drop-down item that matches the answer; e.g., "I saw your ad in *The News*."

Starts	The date the event begins and the date the event should appear on the **Why In** list.
Ends	The date the event ends.
Show Until	The date until which the item should appear on the **Why In** drop-down list.
Cost	The cost to the store of the advertisement.

3. Complete the **Promotion** fields as desired and select the appropriate save option from the **Record Navigation Bar**.

Under System Options ►Promotions, Why In can be set to be a required entry at point of sale. Be sure to make your promotion list flexible enough for your sales associates.

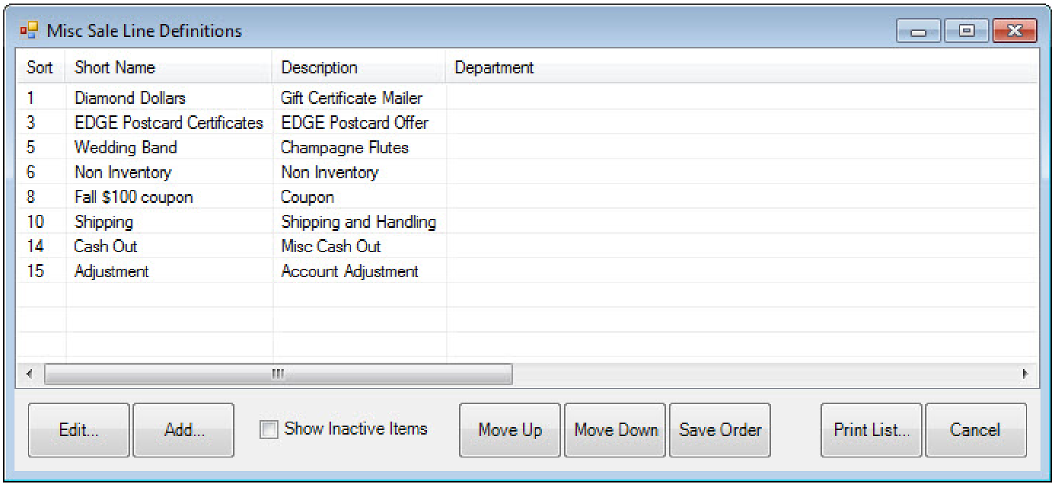
13.5 Misc Sale Lines

In **Misc Sale Lines**, you define things you can do at point of sale that do not fit in well in the predefined inventory or services areas. The Edge offers many options for properly conducting transactions for donations or giveaways, but for things not defined, you can use Misc Sale Lines. Such things might include shipping fees or restocking fees. They can also be used as credits or coupons resulting from promotions.

The use of Misc Charge for regular sales is discouraged. Because there is no offsetting cost or support inventory records on these sales, using this function may skew your profit reports.

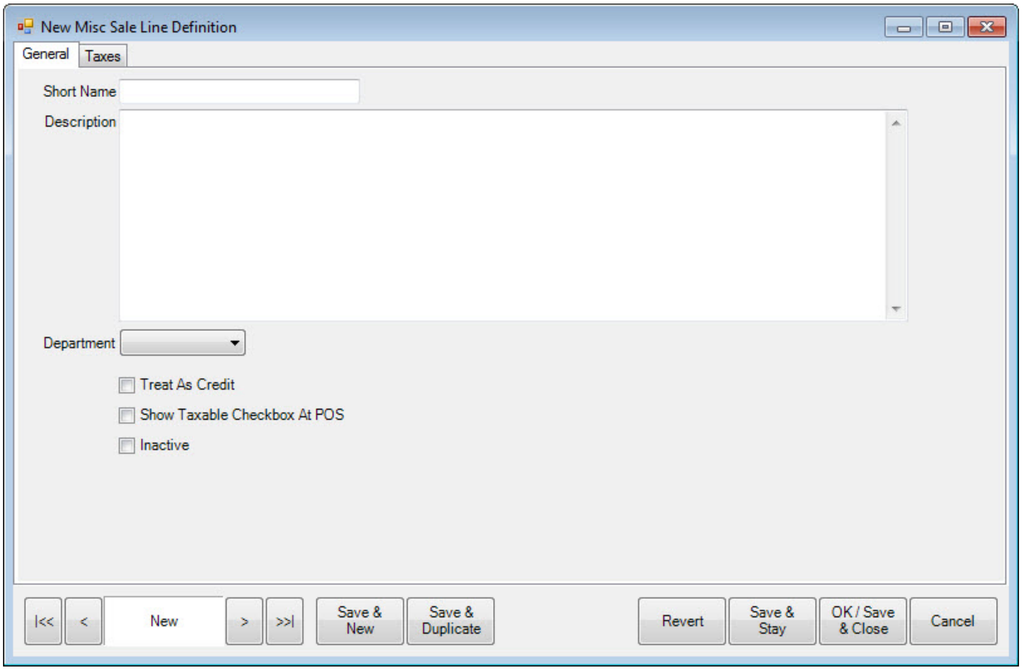
To work with **Misc Sale Lines**:

1. Select **Administrative ► Misc Sale Lines**. The **Misc Sale Line Definitions** window will appear.



Sort	Short Name	Description	Department
1	Diamond Dollars	Gift Certificate Mailer	
3	EDGE Postcard Certificates	EDGE Postcard Offer	
5	Wedding Band	Champagne Flutes	
6	Non Inventory	Non Inventory	
8	Fall $100 coupon	Coupon	
10	Shipping	Shipping and Handling	
14	Cash Out	Misc Cash Out	
15	Adjustment	Account Adjustment	

2. To add a new line definition, select **Add**. The **New Misc Sale Line Definition** window will appear. To change an existing record, select **Edit**.



The data fields and options for both **Add** and **Edit** include:

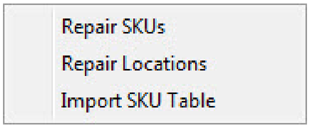
ID	The ID for the definition.
Short Name	The name for the definition.
Description	A more detailed description of the definition.
Treat as Credit	Whether this line should be treated as a credit.
Show Taxable Checkbox at POS	Whether to allow the option to toggle the tax collection.
Inactive	Indicates that this item is no longer used.

3. Complete the fields as desired and select the appropriate save option from the **Record Navigation Bar**.

13.6 Repair

The **Repair Intake** function on the **Point of Sale** window is intended to offer as much data as possible for the user. The options offered there are defined in the **Administrative ► Repair** functions.

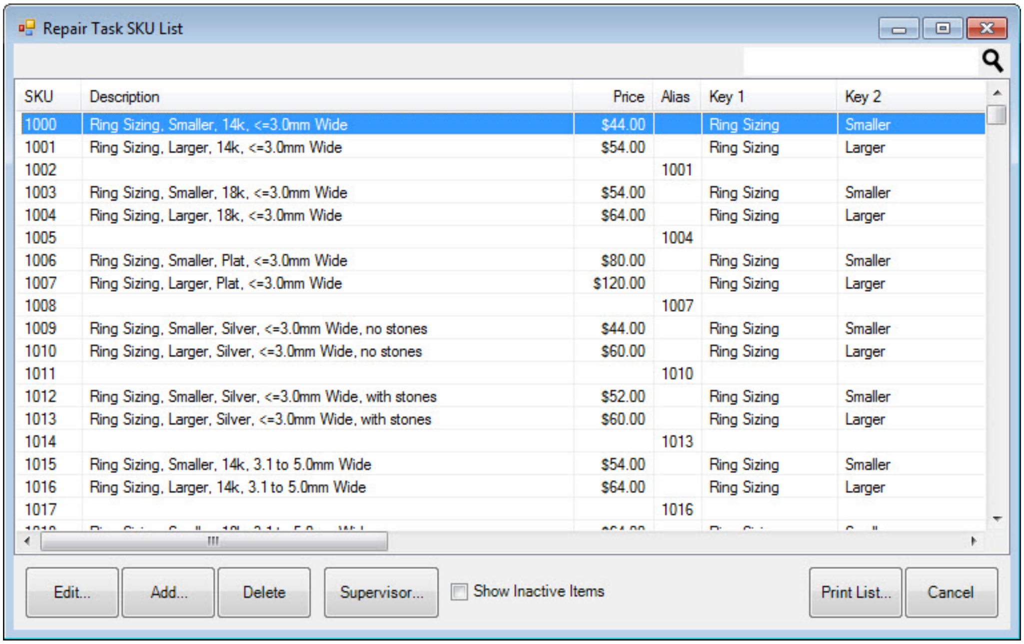
To work with **Repair** definitions, select **Administrative ► Repair**. A drop-down list will appear.



13.6.1 Repair SKUs

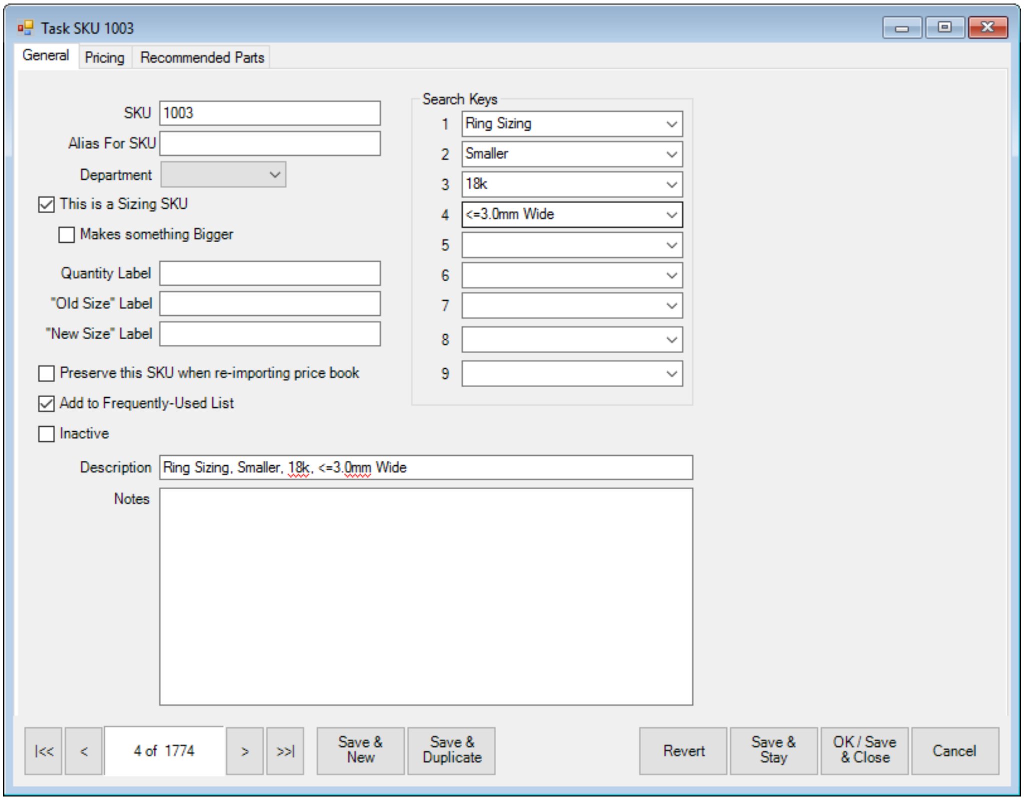
When entering new repairs, you are asked to assign a SKU to the task. These SKUs are defined in **Repair SKUs**. To define a new SKU or edit an existing record:

1. Select **Administrative ► Repairs ► Repair SKUs**. The **Repair Task SKU List** will appear.



SKU	Description	Price	Alias	Key 1	Key 2
1000	Ring Sizing, Smaller, 14k, <=3.0mm Wide	$44.00		Ring Sizing	Smaller
1001	Ring Sizing, Larger, 14k, <=3.0mm Wide	$54.00		Ring Sizing	Larger
1002			1001		
1003	Ring Sizing, Smaller, 18k, <=3.0mm Wide	$54.00		Ring Sizing	Smaller
1004	Ring Sizing, Larger, 18k, <=3.0mm Wide	$64.00		Ring Sizing	Larger
1005			1004		
1006	Ring Sizing, Smaller, Plat, <=3.0mm Wide	$80.00		Ring Sizing	Smaller
1007	Ring Sizing, Larger, Plat, <=3.0mm Wide	$120.00		Ring Sizing	Larger
1008			1007		
1009	Ring Sizing, Smaller, Silver, <=3.0mm Wide, no stones	$44.00		Ring Sizing	Smaller
1010	Ring Sizing, Larger, Silver, <=3.0mm Wide, no stones	$60.00		Ring Sizing	Larger
1011			1010		
1012	Ring Sizing, Smaller, Silver, <=3.0mm Wide, with stones	$52.00		Ring Sizing	Smaller
1013	Ring Sizing, Larger, Silver, <=3.0mm Wide, with stones	$60.00		Ring Sizing	Larger
1014			1013		
1015	Ring Sizing, Smaller, 14k, 3.1 to 5.0mm Wide	$54.00		Ring Sizing	Smaller
1016	Ring Sizing, Larger, 14k, 3.1 to 5.0mm Wide	$64.00		Ring Sizing	Larger
1017			1016		

2. Select **Add** to add a new SKU. The **Repair Task SKU (New)** window will appear with the **General** tab selected. To edit a record, select the desired record and the **Repair Task SKU** window, which is similar to the **Repair Task SKU (New)** window, will appear.



SKU 1003
Alias For SKU
Department
☑ This is a Sizing SKU
☐ Makes something Bigger
Quantity Label
"Old Size" Label
"New Size" Label
☐ Preserve this SKU when re-importing price book
☑ Add to Frequently-Used List
☐ Inactive
Description Ring Sizing, Smaller, 18k, <=3.0mm Wide
Notes

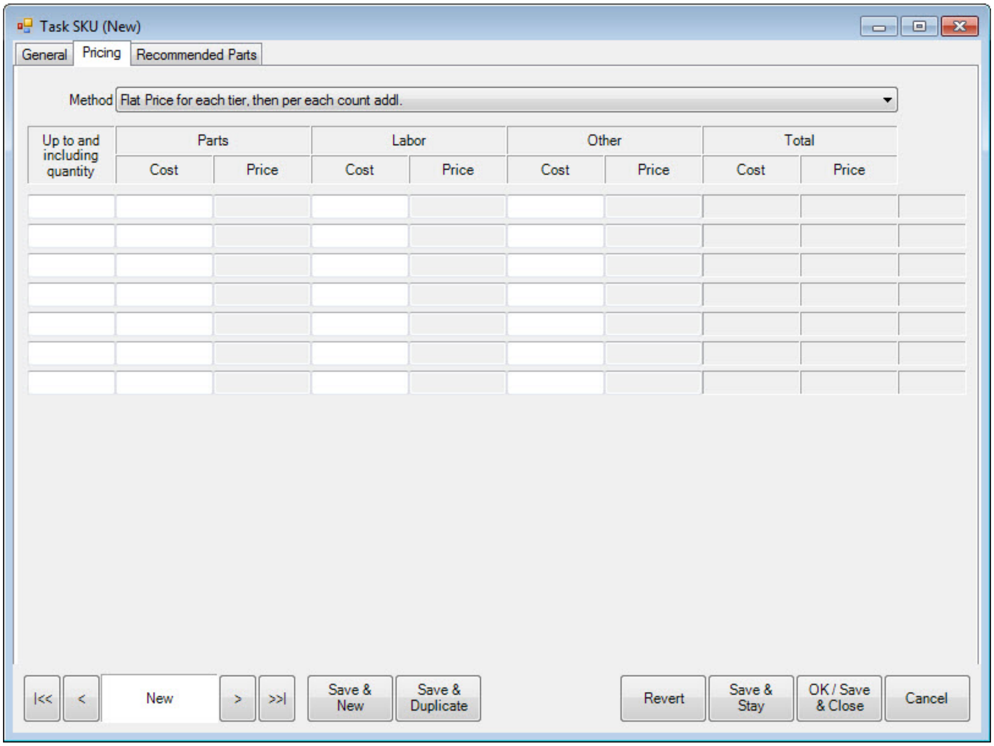
Search Keys
1 Ring Sizing
2 Smaller
3 18k
4 <=3.0mm Wide
5
6
7
8
9

Fields and options in the **General** tab include:

SKU	The SKU to be assigned.
Alias For SKU	The above-specified SKU is merely an alias for the SKU specified in this field. Any reference to the above-specified SKU will automatically be converted to a reference to the SKU in this field.
Department	If you have more than one repair department, this would be the appropriate repair SKU department.
This is a Sizing SKU	Whether this task is a resizing.
Makes Something Bigger	Indicates this repair requires making something bigger.
Quantity Label	Labels the quantity field appropriately. For example, for re-tipping ring prongs, the quantity might refer to number of prongs.
"Old Size" Label	Allows you to name the "old size" label.
"New Size" Label	Allows you to name the "new size" label.
Search Keys	These keys are user-defined parameters by which SKUs can be found. It is very important to be consistent across all lists.

Preserve this SKU when re-importing price book	Whether this SKU should be saved when the book is re-imported.
Add to Frequently-Used List	For use in repair and custom job intake and service record management, this option will allow this SKU to appear in **Frequently-Used SKU** drop-down menus.
Inactive	Indicates that this SKU is inactive.
Description	A description of the task.
Notes	Any other information about the task.

3. Complete the fields in the **General** tab as needed.
4. Select the **Pricing** tab.



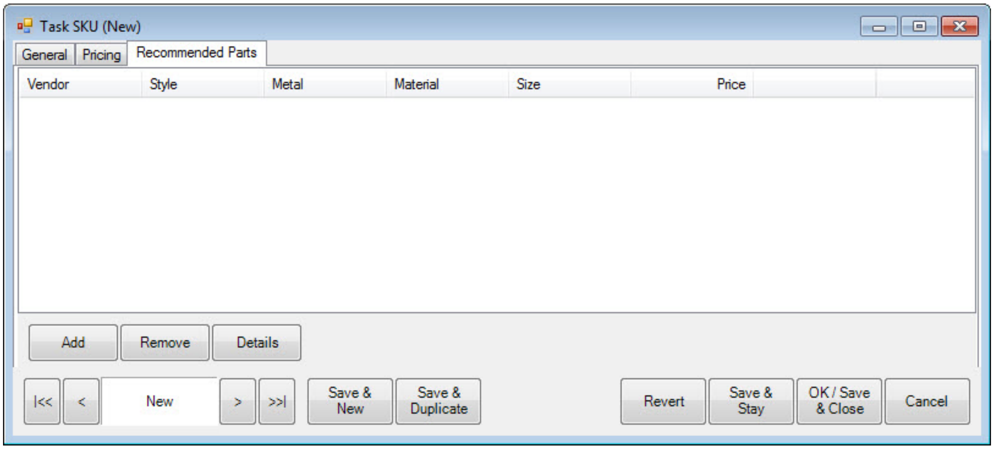
Method: Flat Price for each tier, then per each count addl.

Fields and options in the **Pricing** tab include:

Method	Method on which pricing should be based:

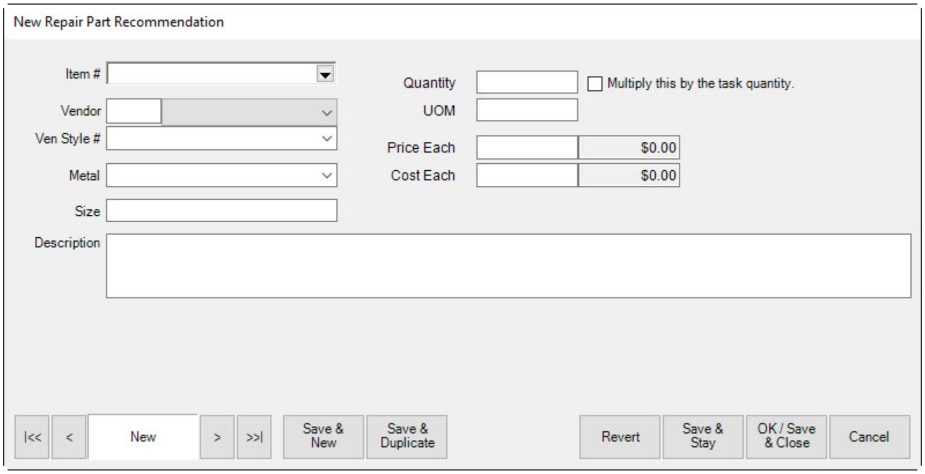
	Price per each: The price of the repair is the sum of the prices for each quantity of the task.
	Flat price each row, last row per each addl: In the price of the task, price is determined by the flat price that corresponds to the user-specified quantity.
Up to and including quantity	The quantity at which the price breaks.
Parts Cost	Cost to the store for parts.
Parts Price	Price to the customer for parts.
Labor Cost	Cost to the store for labor.
Labor Price	Price to the customer for labor.
Other Cost	Cost to the store for other.
Other Price	Price to the customer for other.
Total Cost	Total cost to the store.
Total Price	Total price to the customer, before tax.

5. Complete the fields in the **Pricing** tab as appropriate.
6. Select the **Recommended Parts** tab.



The **Recommended Parts** tab allows you to define parts usually used for this type of task.

7. To remove a part, select the part and select **Remove**.
8. To edit a recommend part record, select the part and select **Details**. Fields will appear as described in the **New Repair Part Recommendation** window, described below.
9. To add a part, select **Add**. The **New Repair Part Recommendation** window will appear.



The **New Repair Part Recommendation** window is where details about the part are entered. Fields and options in the **New Repair Part Recommendation** window include:

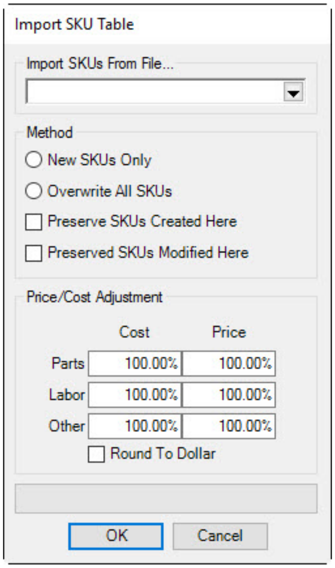
Automatically include this part on the repair when…	Indicates that this part should always automatically be added to the task, as opposed to requiring that the part be added manually.
Item #	For parts taken out of store inventory, the item SKU (bulk).
Quantity	Quantity required for the task.
Multiply this by the task quantity	Automatically use as many of this part as number of times the task is being performed, as opposed to only needing one for a repair with the same task more than once.
Vendor	The vendor from whom the part can be obtained.
UOM	Unit of measure, e.g., number of pieces, inches, or grams.
Vendor Style #	The vendor’s ID number for the part.
Metal	The type of metal from which the part is made.
Size	The size of the part.
Price Each	The price of the part to the customer.
Cost Each	The cost of the part to the store.
Description	A description of the part.

10. Complete **New Repair Part Recommendation** fields as appropriate.
11. Select the appropriate save option from the **Record Navigation Bar**.

13.6.2 Import Repair SKU Table

The Edge allows you to import repair SKUs (i.e., those available from David Geller). To do so:

1. Contact Jeweler Profit at 888-255-9848 or www.jewelerprofit.com to have your Edge license updated.
2. When you get your new license, install it.
3. Download the newest .edgetasksku file from EdgeUser and save the file to a place you will remember.
4. From within The Edge, select **Administrative ►Repairs ►Import SKU Table**. The **Import SKU Table** window will appear.



	Cost	Price
Parts	100.00%	100.00%
Labor	100.00%	100.00%
Other	100.00%	100.00%

Fields and options in the **Import SKU Table** window include:

Import SKUs from File…	Select source file for SKU import using the browse window and locating one of these files: • **Edge Simple SKUs** • **Geller Blue Book**.
Method	Method by which SKUs should be imported when some already exist: • **New SKUs Only** • **Overwrite all SKUs** • **Preserve SKUs Created Here** • **Preserved SKUs Modified Here**.

Price/Cost Adjustment	By how much costs and prices should be adjusted at import. • **Cost Parts** • **Cost Labor** • **Cost Other** • **Price Parts** • **Price Labor** • **Price Other**
Round to Dollar	Whether the prices above should be rounded to the nearest dollar.

5. Use the **Import SKUs from File…** drop-down to browse to the saved file.
6. We recommend that you opt to **Overwrite all SKUs**.
7. Make other changes as needed.
8. Select **OK** to proceed with the import process.

The Geller data is licensed from Jeweler Profit. You will not be able to import the full book unless you have purchased a license from Jeweler Profit. Please contact them directly at 888-255-9848 or visit them on the web at www.JewelerProfit.com.

13.7 Locations

For the purposes of tracking item locations within a store, The Edge offers a **Location** field in item records. A location should be designated for every place in your store where you might look when searching for an item. For example, you might have a showcase location such as Bridal, Window, or common locations like Vault, Safe, or Shop. The Locations function works in conjunction with physical inventory in that you can assign items to a location while scanning or determine what is no longer there.

The Move function provides an efficient way to keep items physical locations up to date and accurate. These features are detailed in this document. For the purposes of this feature and document, “items” also refers to repairs, job envelopes, or anything that has a location.

When adding an item, select the location from the **Location** drop-down menu on the **General** tab. The **Locations** drop-down menu is also used in the inventory function and in the move function. Available locations, those which appear in the **Location** drop-down menu, are managed from **Administrative ► Locations**.

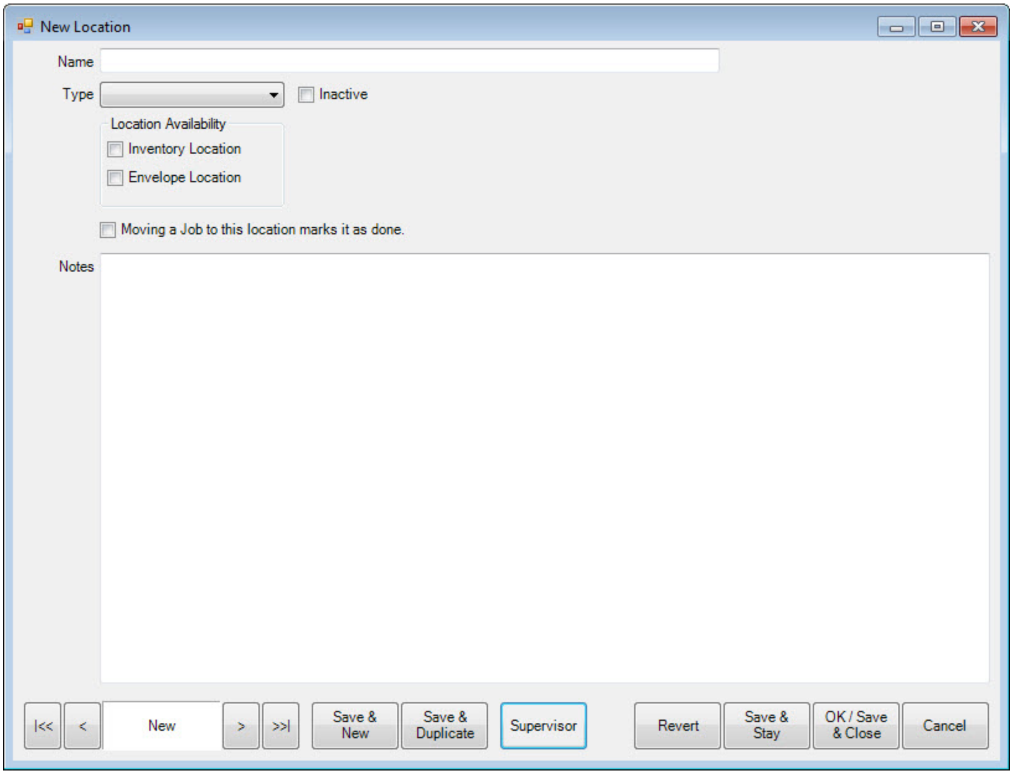
Assigning a location while adding inventory is not always practical, therefore an entry is not required. Once inventory has been added, consider updating that item location by manually editing the item location at a later date.

If you're working with locations for the first time, The Edge will update the locations table with your previous locations. Note that when using the Item Edit function, the **Locations** drop-down menu may include only active, inventory locations. Repair and other service locations will only appear when appropriate for the function you're accessing.

13.7.1 Adding a Location

A location must be created before an item can be assigned to it. Items can be assigned to locations one by one by editing the location field or en masse. To create a new location to use in item records:

1. Select **Administrative ► Locations ► Add Location**. The **New Location** window will appear.



Fields and options in the **New Location** window include:

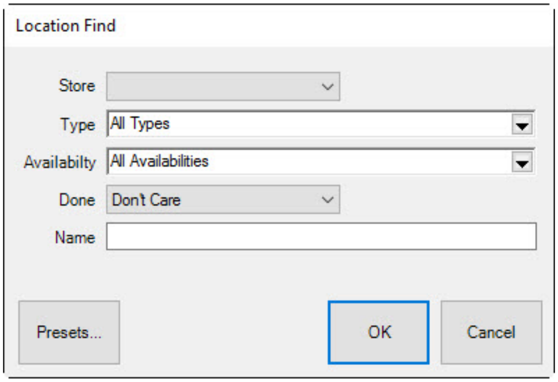
Name	The name of the location.
Type	The type of location: - **Back Stock** - **Bin** - **On Display** - **Outside Vendor** - **Station**.
Inactive	Whether the location is active and available for use.
Location Availability	What kind of availability the location has: - **Inventory Location** - **Envelope Location**.
Moving a Job to this location marks it as done.	Used for appraisals, builds, assemblies, and repairs, this indicates that when you move an envelope here, the job is also marked as done and the current date is applied as the done date.
Notes	Contains notes concerning the location and its use.

2. Complete the fields in the **New Location** window as needed.
3. Select a save option. The location will appear in the **Location** drop-down menu.

13.7.2 Finding and Editing a Location

To work with existing location records:

1. Select **Administrative ▶ Locations ▶ Location Find**. The **Location Find** window will appear.



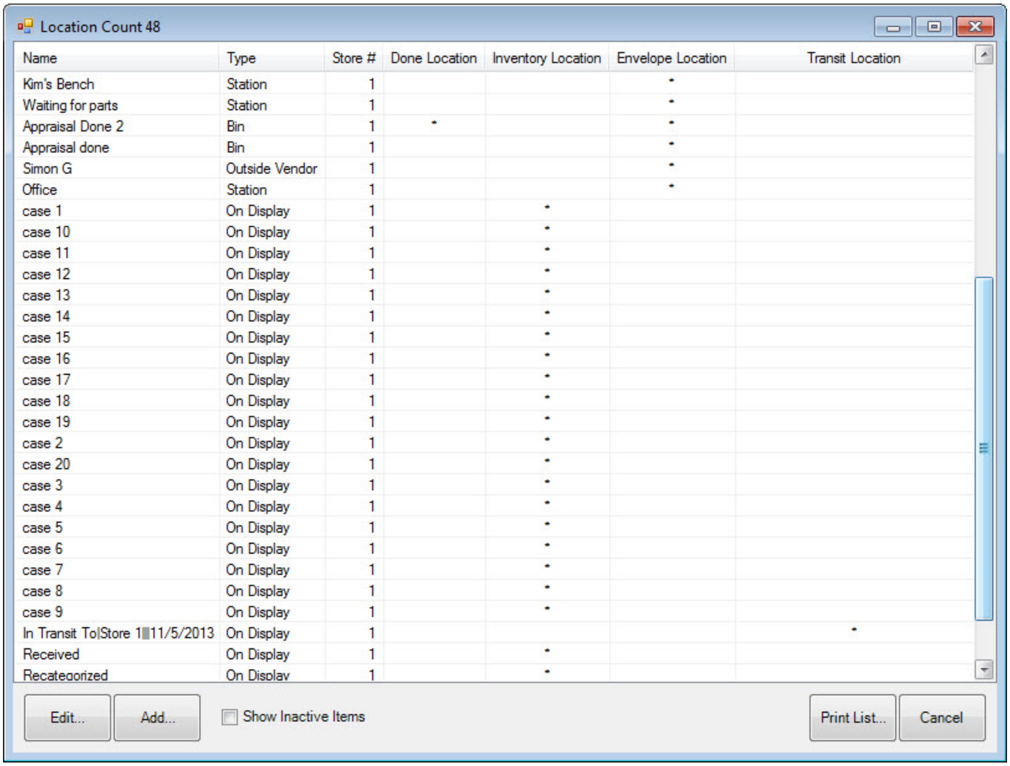
Store
Type: All Types
Availabilty: All Availabilities
Done: Don't Care
Name

Filters in the **Location Find** window include:

Store	Returns records of locations in the specified store.
Type	Returns records with the specified type of location: • **Station** • **Bin** • **Outside Vendor** • **On Display** • **Back Stock** • **Transit**.
Availability	Returns records with the specified location availability: • **Envelope** • **Transit** • **Inventory.**

Done	Returns records of locations that indicate whether a job is done: • **Don’t Care** • **Done Location** • **Not Done Location**.
Name	Returns locations with a specified name.

2. Select filters as desired.
3. Select **OK**. The **Location** list will appear indicating the name, type, and availability.



Name	Type	Store #	Done Location	Inventory Location	Envelope Location	Transit Location
Kim's Bench	Station	1			*	
Waiting for parts	Station	1			*	
Appraisal Done 2	Bin	1	*		*	
Appraisal done	Bin	1			*	
Simon G	Outside Vendor	1			*	
Office	Station	1			*	
case 1	On Display	1		*		
case 10	On Display	1		*		
case 11	On Display	1		*		
case 12	On Display	1		*		
case 13	On Display	1		*		
case 14	On Display	1		*		
case 15	On Display	1		*		
case 16	On Display	1		*		
case 17	On Display	1		*		
case 18	On Display	1		*		
case 19	On Display	1		*		
case 2	On Display	1		*		
case 20	On Display	1		*		
case 3	On Display	1		*		
case 4	On Display	1		*		
case 5	On Display	1		*		
case 6	On Display	1		*		
case 7	On Display	1		*		
case 8	On Display	1		*		
case 9	On Display	1		*		
In Transit To|Store 1|||11/5/2013	On Display	1				*
Received	On Display	1		*		
Recategorized	On Display	1		*		

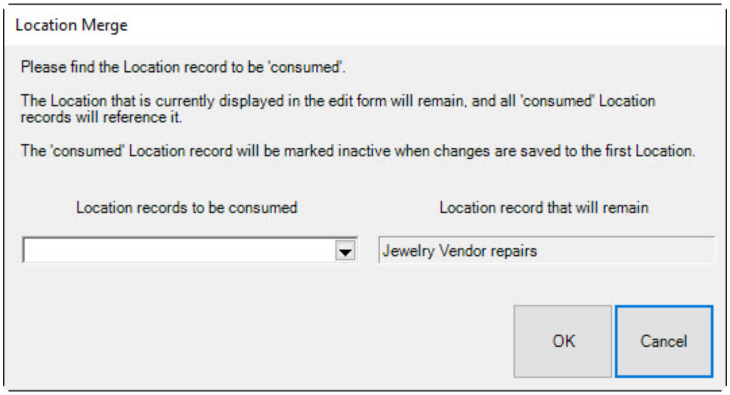
In these results, notice that the location’s status as to done and its availability is marked with an asterisk.

4. Select a location record and edit it as necessary.

13.7.3 Merge Locations

Found in the **Supervisor** menu of the **Location** window, **Merge Locations** allows you to merge one or more location, and items, repairs, or jobs in it, with another. Merge locations is useful in cleaning up or retiring locations. Plan location merges carefully; it cannot be undone. To do so:

1. Select **Supervisor** ► **Merge Locations**. The **Location Merge** window will appear.



Please find the Location record to be 'consumed'.

The Location that is currently displayed in the edit form will remain, and all 'consumed' Location records will reference it.

The 'consumed' Location record will be marked inactive when changes are saved to the first Location.

Location records to be consumed:

Location record that will remain: Jewelry Vendor repairs

2. On the left, select the location to be merged from the **Location record to be consumed** drop-down menu. You can select more than one location.
3. On the right, the location from which you used the function will be listed in the **Location record that will remain** field. This is the destination location.
4. Select **OK**. The **Location** window will return, showing the locations that are to be absorbed.

To complete the merge, from the **Location** window, select a **Save** option.

13.8 QuickBooks®

The Edge/QuickBooks integration posts aggregated sales and inventory data from The Edge to QuickBooks. It is our intent that The Edge be the sole owner of your customer and inventory details, but we understand that QuickBooks can better handle your accounting needs. In this arrangement, your QuickBooks company file will not contain any of your customer records, nor any single inventory item. The Edge posts General Ledger (G/L) entries for almost everything. In almost all cases, a full day's activity is posted as a single G/L entry per account pair. It does not post sales per se. The sales reports in QuickBooks will not reflect sales handled by The Edge, but the profit/loss statement and balance sheet will accurately reflect all activity from both The Edge and QuickBooks. Cash taken in at point of sale will be aggregated and posted to a cash-on-hand account (e.g., undeposited funds), but checks and credit card payments will be posted as individual payments, and will appear as undeposited funds, so as to facilitate your bank deposits.

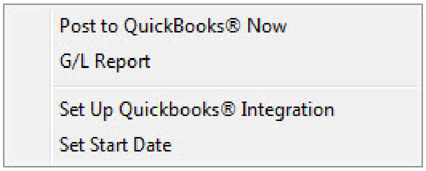
The Edge allows you to integrate features and map to your QuickBooks chart of accounts in a very flexible manner. It is required that every feature in The Edge be mapped to an appropriate account in your chart of accounts, even if you do not use this feature. This ensures all activity can be posted to QuickBooks, even if the feature is used some time in the future.

Nearly every QuickBooks user has a chart of accounts different than any other user. The design of your chart of accounts is a matter that you should discuss with your bookkeeper or, better yet, your accountant. You should design a chart of accounts that works for your unique business situation, and set up The Edge so that it posts to the G/L accounts that make sense for you.

You should be aware that The Edge will **not** do the following with QuickBooks:

- Transfer vendor or customer details to or from QuickBooks.
- Generate vendor bills. All bills must be entered manually into QuickBooks.
- Write checks. All checks must be written via QuickBooks.
- Transfer commission figures to QuickBooks. Commission calculations on The Edge are all ad-hoc, meaning that most jewelers will run commission reports several times, in several different ways, and sometimes make manual adjustments to the commissions due. Commission checks should be written via QuickBooks and possibly included in payroll checks.

To work with QuickBooks and The Edge, select **Administrative ► QuickBooks®**. A drop-down list of options will appear.



- Post to QB Now: This is how a store posts the pending transactions to QB (typically daily).
- GL Report: This is a report that shows detail or summary data in **Debit/Credit** format.

- Set Up QuickBooks Integration: This is where all the linkage between The Edge features/QuickBooks accounts are set.
- Set Start Date: This is where a store decides the **From Date** to post detail from The Edge to QuickBooks.

First we'll summarize Set Up and Important Operational notes, then explain Setup QuickBooks Integration in detail

13.8.1 QuickBooks Operational Summary

To properly integrate The Edge with your QuickBooks Company file, there are several steps to complete:

- Assessment/Qualification:
    - Will integrating The Edge/QuickBooks save in bookkeeping time?
    - Am I ready to integrate The Edge with QuickBooks?
    - See "Should I Integrate" and "When Should I Integrate" in the section entitled QuickBooks FAQs.

- Getting Prepared:
    - Purchase QuickBooks Pro Desktop or QuickBooks Online
    - Read The Edge/QuickBooks documentation (review with your accountant)
    - Create a new QuickBooks Company Files or prepare your existing company files by:
        - Adding the necessary point of sale Customer Record, Vendor, Payment Methods
        - Adding required accounts to your QuickBooks Chart of Accounts (COA)
    - Prepare the Chart of Accounts (COA) for integration
    - Plan The Edge/QuickBooks start date (with your accountant) for The Edge to begin posting detail to QuickBooks
    - Prepare starting balances (with your accountant)
    - Update The Edge (plan to install the latest version of The Edge before integration)
    - Consider obtaining the advice of a QuickBooks-certified retail consultant knowledgeable in the jewelry industry.

- Integrating The Edge with QuickBooks:
    - Allow initial integration:
        - QuickBooks Desktop: Install QBFC from www.EdgeUser.com
        - QuickBooks Online: Authenticate server through Edge
    - Set QuickBooks Permissions (QuickBooks needs to be set to allow The Edge to post data)
    - Map The Edge with QuickBooks:
        - Link point of sale customer to a single customer record in QuickBooks (this is where are all sales data will post to in QuickBooks)
        - Link The Edge features to QuickBooks chart of accounts
        - Link MISC charges to QuickBooks chart of accounts and be prepared to update these links as your MISC charges change
        - Link Tax definitions to QuickBooks tax vendor
        - Link The Edge stores to QuickBooks classes (optional for multi-store users)

- Link The Edge credit card types to QuickBooks payment methods (matched by the exact name). Be prepared to update this as you add payment methods.

Review all QuickBooks setup with your accountant and/or bookkeeper responsible for maintaining the accounts.

- Initial Posting from The Edge to QuickBooks:
  - Set a QuickBooks start date (in The Edge) as planned with your accountant/bookkeeper (The Edge sets all prior data as "already posted")
  - Post from The Edge to QuickBooks for the first time
  - Set starting balances for all accounts in QuickBooks (with guidance from your accountant/bookkeeper).

- The Edge/QuickBooks Maintenance
  - Post from The Edge to QuickBooks regularly (perhaps each morning)
  - Make certain bookkeeping staff follows The Edge/QuickBooks Maintenance Procedures.

Abbott Jewelry Systems, Inc. cannot be held responsible for the maintenance of your QuickBooks financial data. The relationship between The Edge and QuickBooks is unidirectional, meaning The Edge posts to QuickBooks but is unaware of any journal entries, additions, or subtractions of data that occurs directly in QuickBooks. Resolving inaccurate financial information is not something with which we have the expertise to assist you. You would need to seek assistance from your accountant. Be sure to maintain your books!

The Edge team has provided a procedural document which explains some important accounts and functions that must be managed directly in QuickBooks regularly. Failure to maintain these procedures will result in inaccurate financial statements. Contact The Edge Support Team for the current procedural document. The following video tutorials may be helpful in reconciling accounts:

QuickBooks: Reconciliation Procedures: Undeposited Funds and Refunds	http://www.screencast.com/t/rRHzEJT3h
QuickBooks: Reconciliation Procedures: Memo Payments Due	http://www.screencast.com/t/zxz073uHNxqu
QuickBooks: Reconciliation Procedures: Consignment Payments Due	http://www.screencast.com/t/JDqLDjfn
QuickBooks: Reconciliation Procedures: Inventory RTV	http://www.screencast.com/t/i7YczAICj
QuickBooks: Reconciliation Procedures: Inventory QB	http://www.screencast.com/t/AntNGhJf

13.8.2 QuickBooks Setup

The Edge supports both QuickBooks Desktop and QuickBooks Online.

13.8.2.1 QuickBooks Desktop

To integrate with QuickBooks Desktop you must first install QBFC. This is an application provided by Intuit that allows The Edge to communicate with QuickBooks. Once installed, you must then grant The Edge permission to access your company file. To do so:

1. Download and install QBFC using this link: http://download.edgeuser.com/edgeupdates/QBFC13_0Installer.exe
2. Launch QuickBooks and open your QuickBooks company file.
3. Resolve any QuickBooks reminders requiring your input (backups, updates, etc).
4. Launch The Edge.
5. Select **Administrative** ► **QuickBooks** ► **Setup QuickBooks Integration**.
6. Use the drop-down under QuickBooks Enterprise to locate your company file.
7. On the **General** tab, click the drop-down arrow on the **Point of Sale Customer** field. This will initiate connection between The Edge and QuickBooks. QuickBooks will begin blinking on your Windows task bar to alert you attention is required.
8. Select QuickBooks. You will be prompted to grant The Edge permission to read and modify your QuickBooks company file.
9. Continue to section **11.8.2.3 Mapping The Edge with QuickBooks Accounts**.

13.8.2.2 QuickBooks Online

QuickBooks Online requires Windows 10 or newer.

To integrate with QuickBooks Online:

1. Launch The Edge.
2. Select **Administrative** ► **QuickBooks** ► **Setup QuickBooks Integration**.
3. Change the radio selector to QuickBooks Online and click the **Authenticate with QuickBooks Online** button.
4. Complete login into QuickBooks Online and select your company file.
5. Once Intuit completed authentication you will be brought to a webpage prompting you to return to The Edge, do so now.
6. Click **Authenticate with Edge Server**.
7. Continue to section **11.8.2.3 Mapping The Edge with QuickBooks Accounts**.

13.8.2.3 Mapping The Edge with QuickBooks Accounts

The Edge must be set up to ensure that every feature available has an appropriate account for posting to your particular QuickBooks Company File. The account names used inside your QuickBooks Company file are at the preference of you and your accountant, just be certain to choose the appropriate account type. In the section entitled The Edge QuickBooks Set Up Integration, features are grouped by Account Type.

Important!

Be sure to map Edge accounts of the correct account type on your QuickBooks chart of accounts when linking Edge features. For example, if The Edge mapping shows an account in a section labeled EXPENSE, be sure to map this Edge feature to an EXPENSE account or risk that this account will post financials on the wrong side of your general ledger.

13.8.2.3.1 Recommended QuickBooks Accounts

Make sure that all activities in The Edge have corresponding accounts in QuickBooks, you should have accounts for the following:

Account Type	Account Name	Sub Account of…
Other Current Asset	Store Charges	
	Inventory Asset	
	Inventory QB	Inventory Asset
	Inventory EDGE	Inventory Asset
	Inventory Scrap	Inventory Asset
	Inventory RTV	Inventory Asset
	Inventory Assembly/Disassembly	Inventory Asset
Expense	Balance Adjustments	
	Missing Inventory	
	Rewards Cards	
	Referral Fees	
	Item Donation	
	Item Giveaway/Promotion	
Income	Fee Income	
	Appraisal Income	
	Shipping Income	
	Interest Income	
	Product Sales	
	Showcase Sales	Product Sales
	Special Order & Memo	Product Sales
	Shop Sales	
	Jewelry Repair	Shop Sales
	Scrap Income	
	Care Plan	
Other Current Liability	Customer Appraisal Deposits	
	Customer Layaway Deposits	
	Memo Out Deposits	
	Special Order Deposits	
	Repair Deposits	
	Gift Certificates	

	Refunds Due	
	Store Credits	
	Memo Goods	
	Memo Payments Due	
	Consignment Goods	
	Consignment Payments Due	
COGS	Cost of Goods	
	Special Order & Memo	Cost of Goods
	Showcase COGS	Cost of Goods
	Scrap COGS	

- **We will use all of the above accounts in The Edge when we set up the QuickBooks integration.**
- **Create a customer named "Point of Sale" in QuickBooks. This is where The Edge will post all sales data.**
- **Create a vendor account where you pay your sales tax to specify where The Edge should post tax liability.**
- **Create a payment method in QuickBooks for each method of tender taken in The Edge.**

13.8.2.3.2 QuickBooks Setup General Tab

To set up The Edge to post to QuickBooks:

Select **Administrative** ►**QuickBooks** ►**Set Up QuickBooks Integration**. The **QuickBooks Setup** window will appear with the **General** tab selected.

Most Edge features post to accounts; no direct maintenance in QuickBooks is required. However, some features in The Edge post to an account in QuickBooks that may not represent the final step in bookkeeping. In these cases, The Edge has taken the financials as far as it can go and a direct QuickBooks maintenance procedure will be required.

In this section of the User Guide, the accounts marked with an asterisk (*) indicate a manual QuickBooks bookkeeping procedure is required.

Company File

POS "Customer" Point Of Sale

Maximum Number Length 16

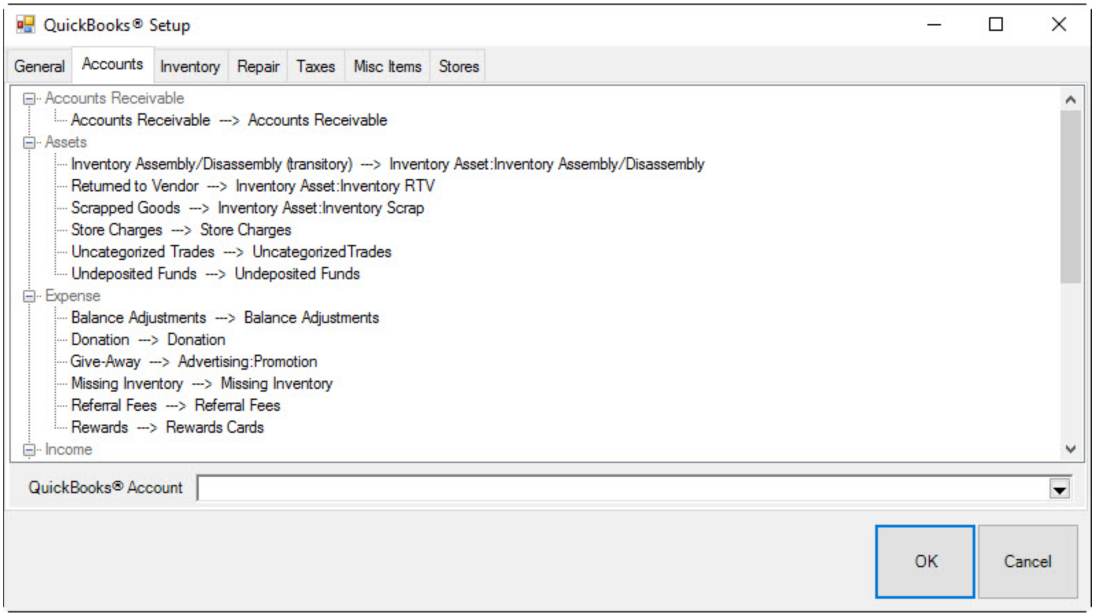
The **General** tab contains three data entry fields:

Company File	Optional. If you specify a QuickBooks company file here, The Edge will launch QuickBooks when you attempt to post. If you leave this blank (which most do), The Edge will require you to have your QuickBooks Company File open before you can post.
POS "Customer"	The QuickBooks customer record to which all sales activity will be attributed. You should create a customer record in QuickBooks for this purpose and name it "POS," for example. **Over time, this single customer record in QuickBooks will accumulate a large amount of sales activity data and cause posting from The Edge to QB to take a long time. To prevent this, you can occasionally create a new customer record in QuickBooks and then link The Edge point of sale customer to that new customer record. Example: POS Customer 2017.**
Maximum Refnum Length	To prevent errors related to reference numbers that are too long, this field should be set to 16 by default. Try 12 or 8 for older versions of QuickBooks.

Browse to these values using the drop-down menu and select the **Accounts** tab.

13.8.2.3.3 QuickBooks Accounts Tab

The **Accounts** tab contains a tree view of The Edge features organized by account type. These accounts must be mapped to a corresponding account in QuickBooks.



- Accounts Receivable
  - Accounts Receivable --> Accounts Receivable
- Assets
  - Inventory Assembly/Disassembly (transitory) --> Inventory Asset:Inventory Assembly/Disassembly
  - Returned to Vendor --> Inventory Asset:Inventory RTV
  - Scrapped Goods --> Inventory Asset:Inventory Scrap
  - Store Charges --> Store Charges
  - Uncategorized Trades --> UncategorizedTrades
  - Undeposited Funds --> Undeposited Funds
- Expense
  - Balance Adjustments --> Balance Adjustments
  - Donation --> Donation
  - Give-Away --> Advertising:Promotion
  - Missing Inventory --> Missing Inventory
  - Referral Fees --> Referral Fees
  - Rewards --> Rewards Cards
- Income

The following table outlines each account in The Edge and its use.

Accounts Receivable

Accounts Receivable	Set up this account to match QuickBooks' default accounts receivable account. This is usually called "Accounts Receivable" but many users rename it to "Edge Pass-through Account." **For purposes of data integration, The Edge uses the AR account as required pass-through. This account should not have a balance. Do not mistake the use of this account as store receivables.**

Assets

Inventory Assembly/ Disassembly	This should be an asset account, and is used when assembling an item from other items, or breaking an item into several other items. This account also serves as a transitory account for cost of inventory used in repair or custom jobs that are not yet picked up.
***Returned to Vendor**	This should be an asset account, and is used when an item is marked returned to vendor. Understand that The Edge is finished with items that are marked RTV, so this posting moves the item value from your primary asset account to this temporary sub-asset account. You will have to post your own G/L entries to move assets from this account to other accounts when you actually ship items back to the vendor, and/or when you receive credit or payment from the vendor for returned items.

***Scrapped Goods**	This should be an asset account, and is used when an item is marked scrapped. Understand that The Edge is finished with items that are marked SCRAPPED, so this posting moves the item value from your primary asset account to this temporary sub-asset account. You will have to post your own G/L entries to move assets from this account to other accounts when you determine the retained value of the scrapped goods, and how much to write off.
Store Charges	This should be an asset account, not a receivables account, and represents the amount of money people owe you on store charges (house account charges).
Uncategorized Trades	Used when accepting trades at point of sale with no category. There is a system option to assign categories and avoid use of this account.
Undeposited Funds	This feature must be mapped to the "Undeposited Funds" account created by QuickBooks for managing bank deposits. If you do not have this account presently in your chart of accounts, you must enable the feature in QuickBooks. In QuickBooks, select **Edit ► Preferences ► Payments ► Company Preferences** and check the option **Use Undeposited Funds** as a default deposit to account.

Expense

Appraisal Cost	This should be an expense account. When a cost is entered on an appraisal it is debited here.
Balance Adjustment	This should be an expense account. When you make an adjustment to a customer balance by selecting **Adjust Balance** from the **Customer Balance** tab, the difference is posted to this account. You can either create a new account for this purpose, or use an existing account, for example, bad debt write-offs.
Donation	This should be an expense account. When an item is marked as a donation at point of sale, the cost is debited here.
Giveaway	This should be an expense account. When an item is marked as a giveaway at point of sale, the cost is debited here.
***Missing Inventory**	This should be an expense account. When you mark an item lost, stolen, or missing, the cost of that inventory is posted to this account. If an item is later marked found, the value of that item is recouped from this account.
Referral Fees	This should be an expense account. When you award referral bonuses, these fees are a form of advertising expense.
Rewards	This should be an expense account. When a customer spends reward dollars at point of sale, this is a form of advertising expense.

Income

Appraisal Income	This should be an income account. The fees that you collect for performing appraisals will be posted to this account.

Care Plan Income	This should be an income account. The amount you collect for selling a care plan will be posted to this account.
Fee Income	This should be an income account. Restocking fees charged for returns and cancellations will be posted to this account.
Interest Income	This should be an income account. Interest charges applied to store charge balances (house accounts) will be posted to this account.
Shipping Charges	This should be an income account. Money that you collect for shipping charges will be posted to this account.

Do not confuse this with a shipping expense account for fees incurred in store shipping and receiving.

Liabilities

Deposits (Money paid on account for the following)		
	Appraisal Deposits	This should be a liability account. Funds that customers leave on deposit with you while you are appraising their goods are posted to this account.
	Layaway Deposits	This should be a liability account. Funds that customers leave on deposit with you to keep goods on layaway are posted to this account.
	Memo Out Deposits	This should be a liability account. Funds that customers leave on deposit with you while they take goods out on approval are posted to this account.
	Repair/ Custom Deposits	This should be a liability account. Funds that customers leave on deposit with you while you are working on their repairs are posted to this account.
	Special Order Deposits	This should be a liability account. Funds that customers leave on deposit with you while you are getting special order goods for them are posted to this account.
Gift Certificates		This should be a liability account. Funds that you have collected by selling gift certificates or tender cards will be posted to store credit as described below.
***Refunds Due**		This should be a liability account. Funds that you need to return to customers will be posted to this account. For example, if you process a return to a customer by check, The Edge posts the check amount to this account. When you write a refund check to a customer, charge it against this account. Note that the general ledger will indicate (in the memo field) to which customers the refunds are due.

***Sales Tax Payable**	This should be the actual QuickBooks "sales tax payable" account. Any sales tax that you collect will be posted here and will be payable to your tax agency. This will be depleted when you use "Pay Sales Tax" feature in QuickBooks.
Store Credits	This should be a liability account. Funds that you are holding in lieu of giving a customer a cash refund (this is also known as a credit memo) will be posted to this account. Gift certificates and tender cards fall under this category.

Inventory, Repair, and Miscellaneous Income accounts will be set on their respective tabs.

13.8.2.3.4 *Mapping Accounts*

To map an account:

1. Be sure an appropriate account exists in QuickBooks.
2. From **Administrative ►QuickBooks ►Set Up QuickBooks Integration**, select the **Accounts** tab.
3. Select an account from the account hierarchy.
4. Select a QuickBooks account from the drop-down list at the bottom of the window.

An information field will appear at the very bottom of the window that details how The Edge uses the selected account.

5. Select **OK**. Notice that the **Accounts** window will indicate the correlation.

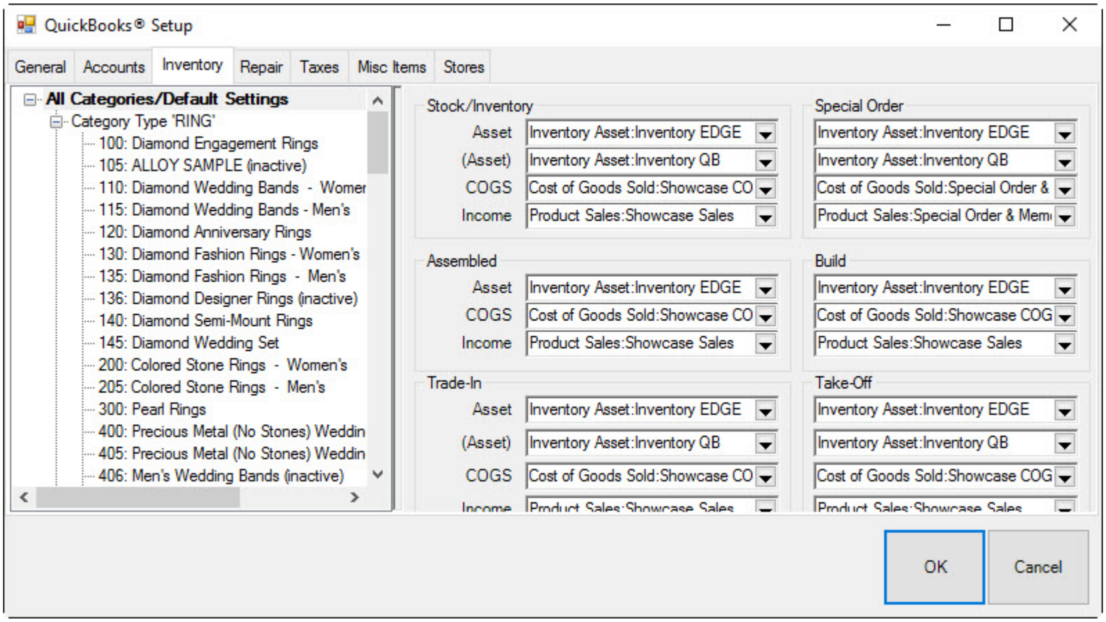
Expense
- Balance Adjustments --> Balance Adjustments
- Donation
- Giveaway
- Missing Inventory --> Missing Inventory
- Referral Fees --> Referral Fees
- Rewards --> Rewards Cards

6. Repeat this process for each account on each of the tabs **QuickBooks Setup** window.

If you encounter the error "QBFC must be installed," revisit the steps in the section entitled Install QBFC.

13.8.2.3.5 *QuickBooks Inventory Tab*

The **Inventory** tab allows you to specify how inventory-related transactions are posted to QuickBooks. This tab consists of a tree view on the left side and four groups of account drop-down fields on the right side.



All Categories/Default Settings
- Category Type 'RING'
  - 100: Diamond Engagement Rings
  - 105: ALLOY SAMPLE (inactive)
  - 110: Diamond Wedding Bands - Womer
  - 115: Diamond Wedding Bands - Men's
  - 120: Diamond Anniversary Rings
  - 130: Diamond Fashion Rings - Women's
  - 135: Diamond Fashion Rings - Men's
  - 136: Diamond Designer Rings (inactive)
  - 140: Diamond Semi-Mount Rings
  - 145: Diamond Wedding Set
  - 200: Colored Stone Rings - Women's
  - 205: Colored Stone Rings - Men's
  - 300: Pearl Rings
  - 400: Precious Metal (No Stones) Weddin
  - 405: Precious Metal (No Stones) Weddin
  - 406: Men's Wedding Bands (inactive)

Stock/Inventory
Asset: Inventory Asset:Inventory EDGE
(Asset): Inventory Asset:Inventory QB
COGS: Cost of Goods Sold:Showcase CO
Income: Product Sales:Showcase Sales

Special Order
Inventory Asset:Inventory EDGE
Inventory Asset:Inventory QB
Cost of Goods Sold:Special Order &
Product Sales:Special Order & Mem

Assembled
Asset: Inventory Asset:Inventory EDGE
COGS: Cost of Goods Sold:Showcase CO
Income: Product Sales:Showcase Sales

Build
Inventory Asset:Inventory EDGE
Cost of Goods Sold:Showcase COG
Product Sales:Showcase Sales

Trade-In
Asset: Inventory Asset:Inventory EDGE
(Asset): Inventory Asset:Inventory QB
COGS: Cost of Goods Sold:Showcase CO
Income: Product Sales:Showcase Sales

Take-Off
Inventory Asset:Inventory EDGE
Inventory Asset:Inventory QB
Cost of Goods Sold:Showcase COG
Product Sales:Showcase Sales

To indicate how transactions are posted to QuickBooks:

1. Select the desired line from the tree view on the left side.
2. Complete the drop-down fields on the right side.

The first line in the QuickBooks mapping tree view, All Categories/Default Settings, applies to every piece of inventory in the system. Point of fact, only this line must be selected and filled in. All other lines in the tree view are for specifying exceptions to the default settings.

The panel on the right allows you to specify the QuickBooks accounts where The Edge will post based on the Inventory Stock Type. For example, you can specify a different Income account for Memo Goods so this income can be tracked separate of owned stock. This is very flexible. You should discuss the level of separation is needed with your accountant

An information field will appear at the very bottom of the window that details how The Edge uses the selected account.

The drop-down groups are defined as follows:

The “Stock/Inventory” Group

Asset	When a stock inventory item is added to inventory, the cost of that item is debited to this G/L account to increase the asset. When a stock item is sold or picked up, this account is credited to decrease the asset.
***(Asset)**	*This is a contra-asset account that must be maintained by you. When a stock inventory item is added to inventory, the cost of that item is credited from this G/L account. When the bookkeeper enters a bill in QuickBooks, the total inventory amount entered in The Edge should be posted to this account. If all inventory items are accurately entered into The Edge and all bills are accurately entered into QuickBooks, this account should be 0.
COGS	COGS stands for Cost of Goods Sold. When a regular inventory item is sold, the cost of that item is moved from the Asset account to this COGS account.
Income	When a regular inventory item is sold, the sale price of that item is posted to this income account. The reverse amount is posted to Accounts Receivable. Any tender taken on the sale is in turn used to offset accounts receivable.

The “Special Order” Group

The fields in this group have exactly the same meaning as in the “Stock/Inventory” group, except that they are used with respect to items of the inventory type Special Order.

The “Assembled” Group

The fields in this group have exactly the same meaning as in the “Stock/Inventory” group, except that, since this inventory is assembled from other items, there is no need for the contra-asset account. The cost of these items will flow in and out of the asset account mapped to the feature Inventory Assembly/Disassembly (see the **Accounts** tab).

The “Take-Off” Group

The fields in this group have exactly the same meaning as in the “Stock/Inventory” group, except that, since this inventory represents pieces taken off of other inventory items, there is no need for the contra-asset account. The cost of these items will flow in and out of the asset account mapped to the feature Inventory Assembly/Disassembly (see the Accounts tab).

The “Trade-In” Group

The fields in this group have exactly the same meaning as in the “Stock/Inventory” group, except that they are used with respect to items of the inventory type Trade-In.

The “Memo Goods” Group

Asset	When a memo item is added to inventory, the cost of that item is debited to this G/L account to increase the asset. When a memo item is sold or picked up, this account is credited to decrease the asset.

Liability	When a memo item is added to inventory, the cost of that item is credited from this G/L account. This allows QuickBooks to keep track of goods in the store that are owned by a third party.
COGS	COGS stands for Cost of Goods Sold. When a memo item is sold, the cost of that item is moved from the asset account to this COGS account.
Income	When a memo item is sold, the sale price of that item is posted to this income account. The reverse amount is posted to Accounts Receivable. Any tender taken on the sale is in turn used to offset accounts receivable.
***Payable**	When a memo item is sold, the cost of that item is moved from the liability account to this Payable account, indicating that the vendor can now be paid. Be sure to use a QuickBooks liability account for this purpose. An accounts payable account will not work properly.

The "Consignment Goods" Group

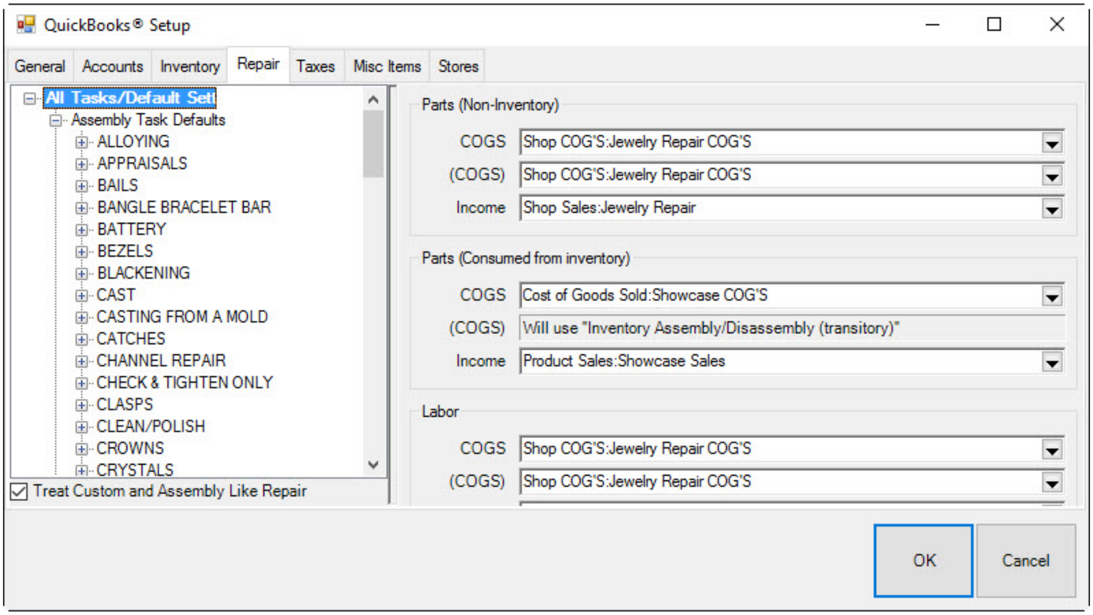
The fields in this group have exactly the same meaning as in the "Memo Goods," except that they are used with respect to items on consignment from a customer. Consignment items are liability items owned by customers and therefore "payable" can be applied differently than memo items, which are owned by a vendor.

There is a **System Option** in The Edge where payment for a sold consignment item can be posted as a credit memo on account for the customer at the time the consignment item is sold. If this option is set to `True`, the payable will post to QuickBooks as to the Credit Memo account instead of a Consignment Payable account.

- **When a memo or consignment item is sold, the item record gets updated with a payable date to reflect that The Edge has posted to Memo or Consignment Payments Due.**
- **If a sold memo or consignment item is returned to stock, it is assumed the item is now owned merchandise. A supervisory function is available to remove the payable if appropriate.**
- **An In Stock Memo or Consignment with a Payable Date is no longer a liability.**

13.8.2.3.6 QuickBooks Repair Tab

The **Repair** tab controls how repair, custom, and assembled items are posted to QuickBooks.



☑ Treat Custom and Assembly Like Repair

Parts (Non-Inventory)

COGS: Shop COG'S:Jewelry Repair COG'S

(COGS): Shop COG'S:Jewelry Repair COG'S

Income: Shop Sales:Jewelry Repair

Parts (Consumed from inventory)

COGS: Cost of Goods Sold:Showcase COG'S

(COGS): Will use "Inventory Assembly/Disassembly (transitory)"

Income: Product Sales:Showcase Sales

Labor

COGS: Shop COG'S:Jewelry Repair COG'S

(COGS): Shop COG'S:Jewelry Repair COG'S

The tree view on the left represents all repair SKUs on file, organized by their search keys. As in the inventory tab, the topmost item of the tree will be the default for all repair tasks, regardless of whether the tasks have an SKU at all. You need not specify anything at all for items other than the top item, unless you want to record expenses or income differently for that branch of the SKU tree.

The panel on the right allows you to specify the QuickBooks accounts where The Edge will post the corresponding income and expenses. For repair and custom jobs, this posting occurs only if and when a job is picked up at point of sale, with one exception: "Parts (Consumed from inventory)" the cost of service parts consumed from inventory are held in the account linked to inventory assembly/disassembly until time of pickup.

Notice the checkbox **Treat Custom and Assembly Like Repair (default)**. Uncheck this box to provide separate mapping accounts for:

- Repair
- Custom
- Assembly.

Fields in the **Repair** tab include:

Parts (non-inventory)

COGS	The cost of any parts used in the completion of a repair or custom job is posted to this account. These are parts that are not part of The Edge inventory records.

(COGS) The cost of any parts used in the completion a repair or custom job is deducted from this account. These are parts that are not part of The Edge inventory records. Often it is preferred to specify the same account for COGS and (COGS) which would result in posting with no net effect. This is typically best because these parts have never been inventoried in The Edge and cost has likely been accounted for in QuickBooks already.

Income The price paid by your customer for any parts used in a repair will be posted to this income account.

The COGS, (COGS), and Income postings occur at the time of pickup of the job.

Parts (consumed from inventory)

COGS The cost of any parts (from inventory) used in the completion of a repair of custom job is posted here. These are parts that are actually part of you inventory in The Edge.

This COGS posting occurs at time of pickup of the job.

(COGS) This feature is automatically linked to the GL Account you have associated with the asset feature **Inventory Assembly/Disassembly** (see the **Accounts** tab). The cost of the inventory item is credited from its inventory asset account and posts as a debit to this account.

This posting occurs at the time the part is associated with the job.

At time of pickup, this account is credited by the amount of the inventory parts cost and posted as a debit to the actual COGS account assigned above.

The GL Account associated with the feature Inventory Assembly/Disassembly is a transitory asset account. This account will have a balance as long as there are Inventory Parts assigned to an open repair or custom job (not yet picked up). When the job is picked up, the Transitory Asset value is reduced and posted to COGS.

Income	The price paid by your customer for any inventory parts (actual inventory items in The Edge) used in a repair or customer job are posted to this account.

The COGS, (COGS), and Income postings occur at the time of pickup of the job.

Labor

COGS	The cost of any labor used in the completion of a repair or custom job is posted to this account.
(COGS)	The cost of any labor used in the completion of a repair or custom job is deducted from this account. If you track labor as a payroll expense, you should specify the same account for COGS and (COGS) and there will be no net effect. Alternatively, when specifying this account, you should consider how you pay for this labor. If your bench jeweler is on a fixed salary, you might want to deduct this amount from “payroll expenses.” If repairs of this type are always sent out, you might want to deduct this amount from an “outside services” account.
Income	The price paid by your customer for any labor used in a repair will be posted to this income account.

The COGS, (COGS), and Income postings occur at the time of pickup of the job.

Other

Other costs on a service job or task typically include shipping fees or insurance.

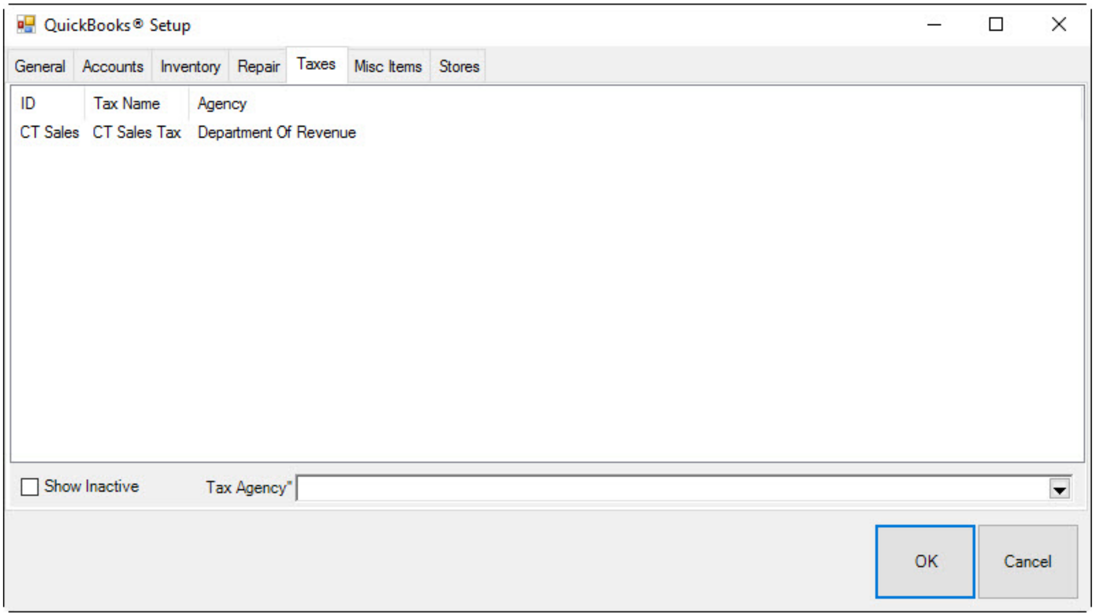
COGS	The cost of any “other” charges associated with the completion of the repair is posted to this account. This upcharge typically corresponds to the risk or liability of breakage.
(COGS)	The cost of any other fees incurred in the completion of the repair is deducted from this account. If you track other charges some other way in QuickBooks, you should specify the same account for COGS and (COGS) and there will be no net effect. Alternatively, if you pay for outside insurance to cover your liability in this area, you might want to specify an insurance expense account here.

Income The price paid by your customer for any other charges will be posted to this income account.

The COGS, (COGS) and Income postings occur at time of pickup of the job.

13.8.2.3.7 QuickBooks Taxes Tab

The **Taxes** tab is for identifying the vendors, or governmental body, to whom sales tax is paid.



ID	Tax Name	Agency
CT Sales	CT Sales Tax	Department Of Revenue

☐ Show Inactive

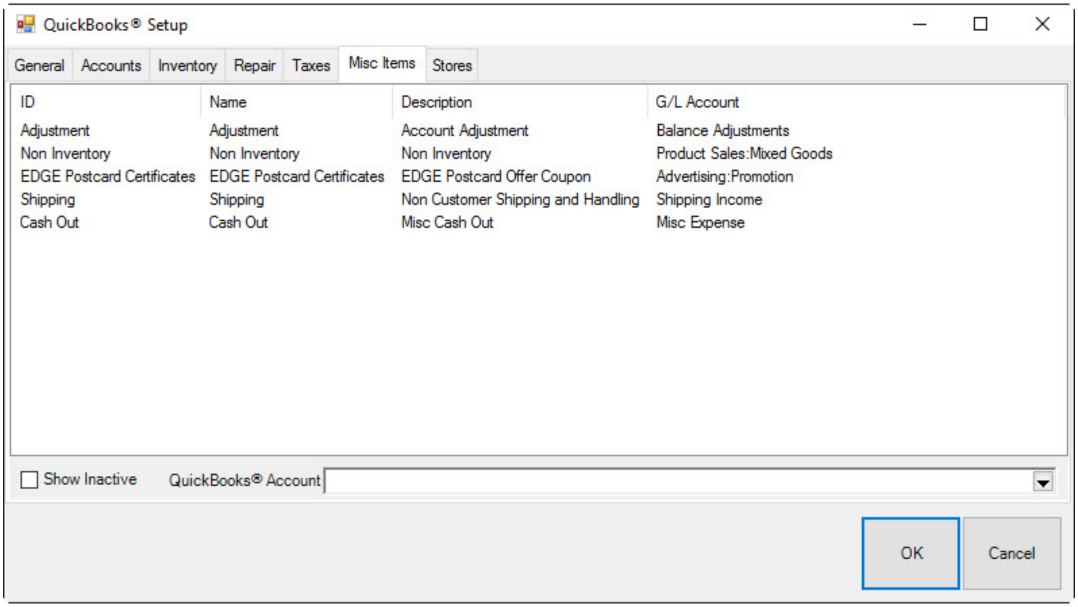
Tax Agency*

For each sales tax definition in The Edge:

1. Select the tax.
2. Select a tax vendor from the **Tax "Vendor"** drop-down list at the bottom of the window. For each definition, select the vendor on file that you write the tax payable check to, e.g., Department of Treasury.
3. Select **OK**.

13.8.2.3.8 QuickBooks Misc Items Tab

The **Misc Items** tab is used to associate each of your miscellaneous sales line definitions to a QuickBooks account. Whenever you sell via a miscellaneous sale line, the amount is posted to the corresponding G/L account, and an offsetting amount is posted to accounts receivable. Any tender is then in turn posted against the accounts receivable.



ID	Name	Description	G/L Account
Adjustment	Adjustment	Account Adjustment	Balance Adjustments
Non Inventory	Non Inventory	Non Inventory	Product Sales:Mixed Goods
EDGE Postcard Certificates	EDGE Postcard Certificates	EDGE Postcard Offer Coupon	Advertising:Promotion
Shipping	Shipping	Non Customer Shipping and Handling	Shipping Income
Cash Out	Cash Out	Misc Cash Out	Misc Expense

☐ Show Inactive

QuickBooks® Account

To associate an account:

1. Select the desired miscellaneous category.
2. Select an account from the **QuickBooks Account** drop-down list.
3. Select **OK**.

Unlike other features in The Edge, we cannot control what Misc Sale lines are used for in daily operations. You may have some Misc lines setup as Credits (such as coupons or donations) that should be mapped to expense-type accounts. Misc sale lines should typically be mapped to either an Income or Expense account. If you are not sure, you should consult your accountant.

Check the Inactive Box to map any Misc Charges that have been used in the past.

13.8.2.4 QuickBooks Stores Tab (optional)

If you operate The Edge in a multi-store environment with transferred records, you can associate each Edge store number with a QuickBooks Class. Associating store number with a separate QuickBooks Class will provide additional definition on QuickBooks reports. If you are unsure how to setup QuickBooks Classes or to find out if this is right for you, contact your accountant.

Edge users in a single store environment need not set this up.

13.8.2.5 Mapping Payment Methods to QuickBooks

Before point of sale activity is posted from The Edge to QuickBooks, all payment methods used in The Edge must be present as payment methods in QuickBooks.

To align payment methods between The Edge and QuickBooks:

1. From The Edge, select **Administrative ► Credit Cards ► Set Up Card Types**.
2. Make note of the QuickBooks Name associated with each Payment Type needed (these will need to match the name on the payment method setup in QuickBooks).
3. **From QuickBooks**, select **List ► Customer Vendor Profiles ► Payment Methods**.
4. Right click to add a new or edit existing payment methods in QuickBooks.

You must ensure that there is a payment method here for each credit card type in The Edge and that it matches the QuickBooks name provided in The Edge exactly (spelling and spacing are significant; upper/lower case is not).

13.8.2.6 Set Start Date in QuickBooks

Before you start posting from The Edge to QuickBooks, you must set a date that signifies the earliest date when detailed records inside The Edge should post to your QuickBooks company file.

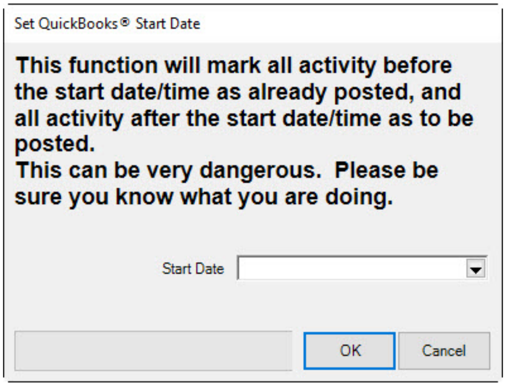
When choosing a QuickBooks Start Date, you should:

- Discuss and coordinate this date with your accountant
- Strategize starting balances with your accountant (up to this date).
- Consider a date that is a start of a month
- Consider the accuracy and completeness of the data to be posted (are you too new to The Edge)
- Understand that data converted from a former system should not be posted.

Important!

Setting a QuickBooks start date is a maintenance step that may take time. Backup The Edge first and perform the operation while no one is using The Edge.

1. Select **Administrative ► QuickBooks ► Set Start Date**. The **Set QuickBooks Start Date** window will appear.



Set QuickBooks® Start Date

This function will mark all activity before the start date/time as already posted, and all activity after the start date/time as to be posted.
This can be very dangerous. Please be sure you know what you are doing.

2. Select a **Start Date** from the date picker or enter the date.
3. Select **OK**.

13.8.2.7 Posting to QuickBooks

Once you have completed setup, you can post the pending transactions that have been stored in The Edge to QuickBooks. The first time you execute this function it may take considerable time to post, depending on the QuickBooks Start Date provided.

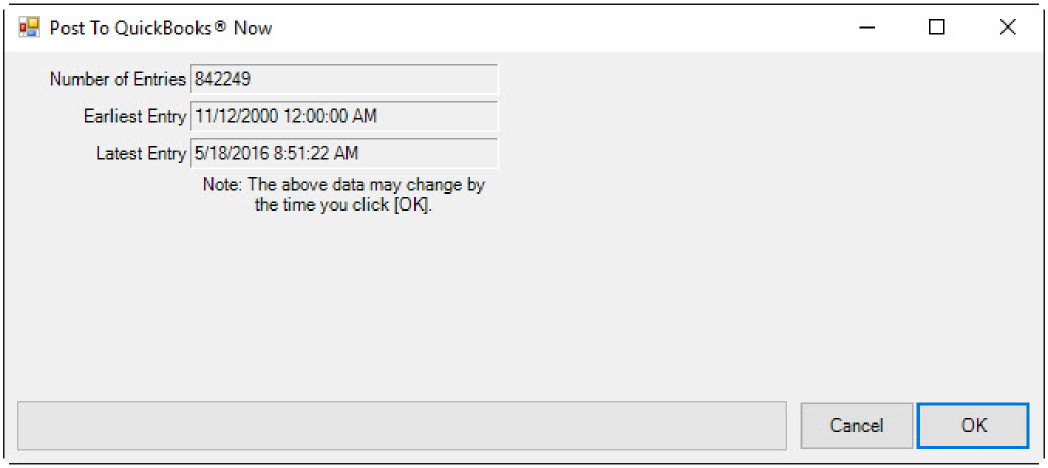
Be sure to make a backup of your QuickBooks Company before your post from Edge to QuickBooks. There is no way to reverse a posting from Edge to QuickBooks. Backup is essential.

Review all setup with your accountant and/or bookkeeper responsible for maintaining the accounts.

After that initial posting, you should post to QuickBooks on a regular basis. We find posting daily or at least several times per week is best as it keeps the posting process efficient which helps prevent communication errors between the two programs.

To post to QuickBooks:

1. Select **Administrative** ► **QuickBooks** ► **Post to QuickBooks**. The **Post to QuickBooks Now** window will appear.



Number of Entries 842249
Earliest Entry 11/12/2000 12:00:00 AM
Latest Entry 5/18/2016 8:51:22 AM
Note: The above data may change by the time you click [OK].

The Edge prepares a summary reflecting the number of entries, earliest dated entry and latest dated entry that are pending to be posted. If the summary looks accurate, move on with posting.

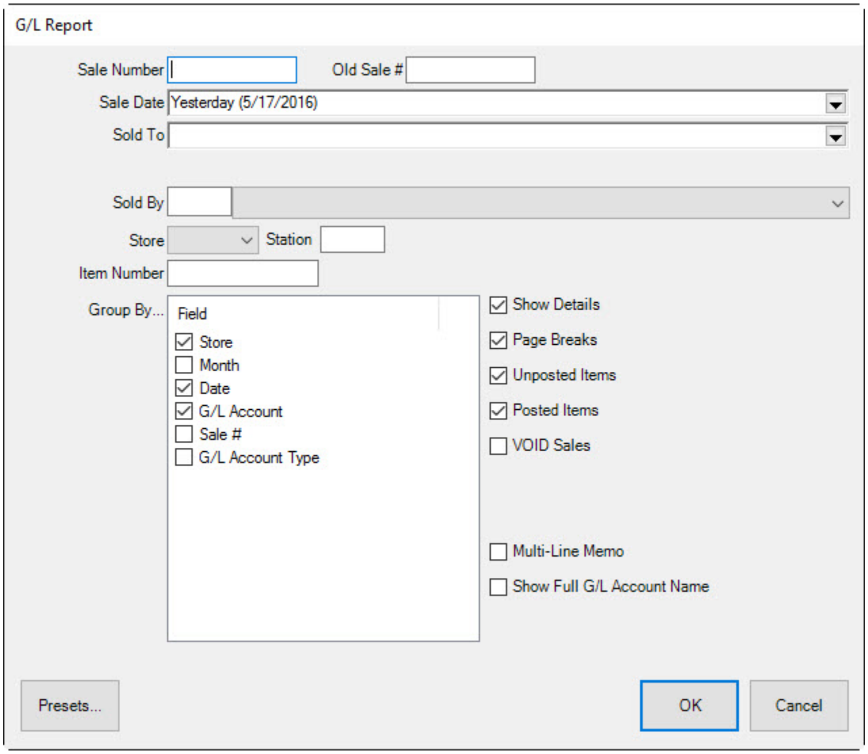
To see a listing of the data pending to post, run a GL Report and check “Unposted Items” within the date range reflected in the summary.

2. Select **OK** to post the entries.

13.8.2.8 G/L Report

The **G/L Report** details how The Edge interacts with QuickBooks. It is a useful tool in analyzing how The Edge data is translated into debits and credits. To use the **G/L Report**, you must first integrate The Edge with QuickBooks. See the section entitled Mapping The Edge with QuickBooks Accounts, for more information on this process.

To run the **G/L** report: Select **Administrative ► QuickBooks ► G/L Report**. The **G/L Report** window will appear.



G/L Report

Sale Number

Old Sale #

Sale Date: Yesterday (5/17/2016)

Sold To

Sold By

Store

Station

Item Number

Group By...

Field
☑ Store
☐ Month
☑ Date
☑ G/L Account
☐ Sale #
☐ G/L Account Type

☑ Show Details
☑ Page Breaks
☑ Unposted Items
☑ Posted Items
☐ VOID Sales
☐ Multi-Line Memo
☐ Show Full G/L Account Name

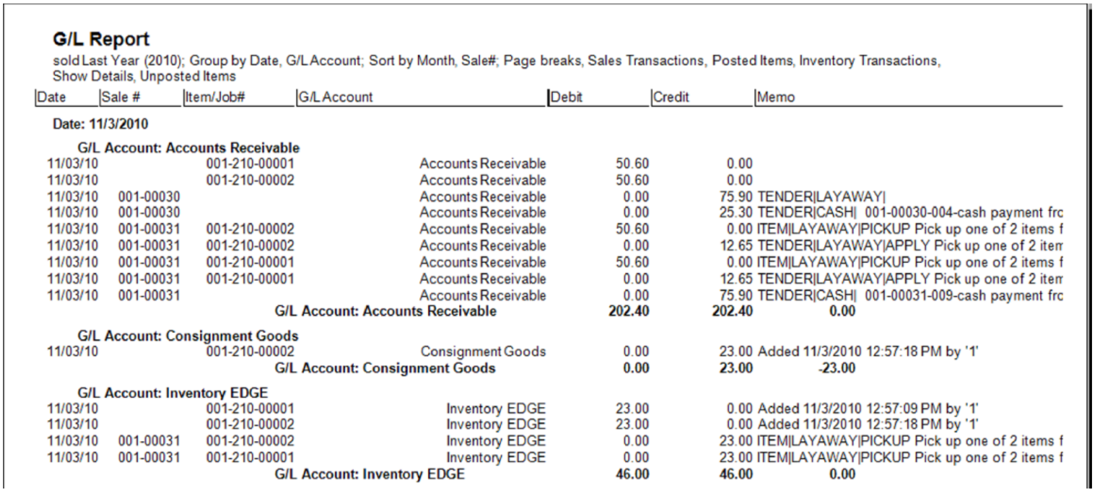
Fields on this report filter include:

Sales Number	Allows you to specify a single sale number. Useful for seeing how a particular transaction will post or has posted to QuickBooks.
Old Sales #	Allows you to specify an old sales number.
Sale Date	Allows you to specify a sales period.
Sold To	Allows you to specify a customer or group of customers.
Sold By	Allows you to specify a sales associate.
Store	Allows you to filter by store.
Item Number	Allows you to specify a single item number. Useful for seeing how a specific item will post or has posted to QuickBooks.
Station	Allows you to filter by computer station.
Group by	
Store	Breaks down the report by store.
Month	Breaks down the report by month.
Date	Breaks down the report by date.

G/L Account	Breaks down the report by the general ledger accounts in QuickBooks.
Sale #	Breaks down the report by each transaction.
G/L Account Type	Breaks down the report by account type, e.g., liability, payables, etc.

Show Details	Whether to show detailed information or just a summary.
Page Breaks	Whether or break to a new page by grouping options.
Unposted Items	Whether to include transactions that have not yet posted to QuickBooks.
Posted Items	Whether to include transactions that have already posted to QuickBooks.
VOID Sales	Whether to include sales that were voided.
Sales Transactions	Whether to display transactions made through point of sale.
Inventory Transactions	Whether to display changes made to the inventory (adding, deleting, etc.).
Multi-Line Memo	Whether or not to give a full (multi-lined) description of each transaction.
Show Full G/L Account Name	Check this box to see the entire QuickBooks account name, including the parent account name.

The results might look as follows:



G/L Report

sold Last Year (2010); Group by Date, G/L Account; Sort by Month, Sale#; Page breaks, Sales Transactions, Posted Items, Inventory Transactions, Show Details, Unposted Items

Date	Sale #	Item/Job#	G/L Account	Debit	Credit	Memo
Date: 11/3/2010						
G/L Account: Accounts Receivable						
11/03/10		001-210-00001	Accounts Receivable	50.60	0.00	
11/03/10		001-210-00002	Accounts Receivable	50.60	0.00	
11/03/10	001-00030		Accounts Receivable	0.00	75.90	TENDER|LAYAWAY|
11/03/10	001-00030		Accounts Receivable	0.00	25.30	TENDER|CASH| 001-00030-004-cash payment frc
11/03/10	001-00031	001-210-00002	Accounts Receivable	50.60	0.00	ITEM|LAYAWAY|PICKUP Pick up one of 2 items f
11/03/10	001-00031	001-210-00002	Accounts Receivable	0.00	12.65	TENDER|LAYAWAY|APPLY Pick up one of 2 iterr
11/03/10	001-00031	001-210-00001	Accounts Receivable	50.60	0.00	ITEM|LAYAWAY|PICKUP Pick up one of 2 items f
11/03/10	001-00031	001-210-00001	Accounts Receivable	0.00	12.65	TENDER|LAYAWAY|APPLY Pick up one of 2 iterr
11/03/10	001-00031		Accounts Receivable	0.00	75.90	TENDER|CASH| 001-00031-009-cash payment frc
			G/L Account: Accounts Receivable	**202.40**	**202.40**	**0.00**
G/L Account: Consignment Goods						
11/03/10		001-210-00002	Consignment Goods	0.00	23.00	Added 11/3/2010 12:57:18 PM by '1'
			G/L Account: Consignment Goods	**0.00**	**23.00**	**-23.00**
G/L Account: Inventory EDGE						
11/03/10		001-210-00001	Inventory EDGE	23.00	0.00	Added 11/3/2010 12:57:09 PM by '1'
11/03/10		001-210-00002	Inventory EDGE	23.00	0.00	Added 11/3/2010 12:57:18 PM by '1'
11/03/10	001-00031	001-210-00002	Inventory EDGE	0.00	23.00	ITEM|LAYAWAY|PICKUP Pick up one of 2 items f
11/03/10	001-00031	001-210-00001	Inventory EDGE	0.00	23.00	ITEM|LAYAWAY|PICKUP Pick up one of 2 items f
			G/L Account: Inventory EDGE	**46.00**	**46.00**	**0.00**

Data fields returned on this report include:

Date	The date the transaction took place
Sale #	The sales number of the transaction

Item/Job #	Additional reference number for this transaction. This could be a sales number, item number, repair number, or special order number depending on the type of transaction involved.
G/L Account	The account in the QuickBooks General Ledger that this posted to.
Credit	The amount posted to this account as credit.
Debit	The amount posted to this account as debit.
Memo	Gives a description of this transaction.

13.8.3 QuickBooks FAQs

Do I need to buy QuickBooks?
If you want to integrate The Edge and QuickBooks together, then you will have to buy QuickBooks; it is not included in the purchase price of The Edge.

The QuickBooks integration is optional. The Edge is completely functional in the absence of QuickBooks and many stores elect to manually post to QuickBooks or another accounting program.

What version of QuickBooks do I need?
QuickBooks Pro or better, version 2006 or higher. We recommend that you update to the latest available version of QuickBooks Pro, as the newer versions provide a richer programming interface. Periodically, changes are made in The Edge and/or QuickBooks which result in a required upgrade to QuickBooks. We do the best we can to inform all Edge Users of such a requirement in advance.

How many copies of QuickBooks do I need to buy?
You must have at least one PC where both The Edge and QuickBooks are licensed to operate. This is the PC where Set Up and Regular Posting is performed. If you plan to use QuickBooks on multiple computers, you would likely need to purchase a multi-user license. This is not a requirement for use with The Edge.

How should I set up my chart of accounts in QuickBooks?
You should set up your chart of accounts according to your accountant's recommendations. The Edge Support Team can send you a simplified chart of accounts, as an example. After you set up your QuickBooks chart of accounts, you will connect each of The Edge's accounts to the corresponding account in your QuickBooks chart of accounts.

How do I get support for QuickBooks?
You get support for QuickBooks from Intuit, or perhaps some third-party support organization. Intuit provides a certain amount of free support with respect to getting your QuickBooks program installed, after which all support is fee-based.

The Edge Support Team will provide basic guidance to you in order to setup integration. Beyond setup, we provide support with the mechanical linkage between The Edge/QuickBooks to ensure the link between the two programs is functioning correctly. It is important that integration is managed and understood by your bookkeeping staff and/or accountant who can assist you with true accounting decisions.

What about other accounting systems?

We are committed to providing our customers with every advantage that we possibly can. QuickBooks has about 80 percent of the small business accounting market, and Intuit provides excellent support for developers, so it was an easy decision to integrate with QuickBooks. At this time there are no plans to integrate with other accounting systems. This is subject to change.

Should I integrate The Edge with QuickBooks?

You should consider whether integrating will improve bookkeeping methods or save you time. Here are a couple questions to ask yourself.

- Is your bookkeeping done off site? The Edge cannot post to an offsite QuickBooks file without the addition of multi-store software.
- Is your bookkeeping done part time? Part-time bookkeeping itself is just fine; it simply must be considered whether it would be efficient for your bookkeeping staff to learn the integration in order to maintain the books?

When should I integrate The Edge with QuickBooks?

Plan to integrate once you are comfortable that your staff is operating The Edge every day effectively. Also be certain you have completed The Edge New User Checklist. Example: If you have recently converted from another software system, have you:

- Completed a physical inventory?
- Entered all starting receivable and credit balances?
- Are all repairs, layaways, and special orders entered and pending with accurate deposits?

What if I use The Edge in a multi-store environment but the businesses are separate tax entities?

The Edge QuickBooks Integration operates under the assumption that all business postings are part of a single corporate tax entity. The Edge employs the use of classes in QuickBooks to create some separation of store data, but this does not constitute a separate taxable business.

We would advise against integrating with QuickBooks if you use The Edge multi-store setup for the convenience of transferring records between two separate businesses.

How does The Edge Post to QB when I do the X (x represents what you are inquiring about)?

No matter type function you are trying to understand, you can get your answer from The Edge GL Report.

Find a day where you know a transaction of that type has occurred and run the GL report for that day only, with details. If the transaction is from point of sale, you can choose the GL Report option Group By Sale # (uncheck other group options) to see the debits and credits organized sale by sale.

What is the difference between Inventory Edge and Inventory QuickBooks?

The relationship between Inventory Edge and Inventory QuickBooks is a common cause of question and confusion when unfamiliar with our integration. Inventory Edge is the default asset account used to post all Inventory On-Hand that is entered into The Edge. Inventory QuickBooks is a contra-asset account used to hold the credit side of new Edge inventory entered. This credit is posted to QuickBooks and should be managed in QuickBooks as vendor bills are entered.

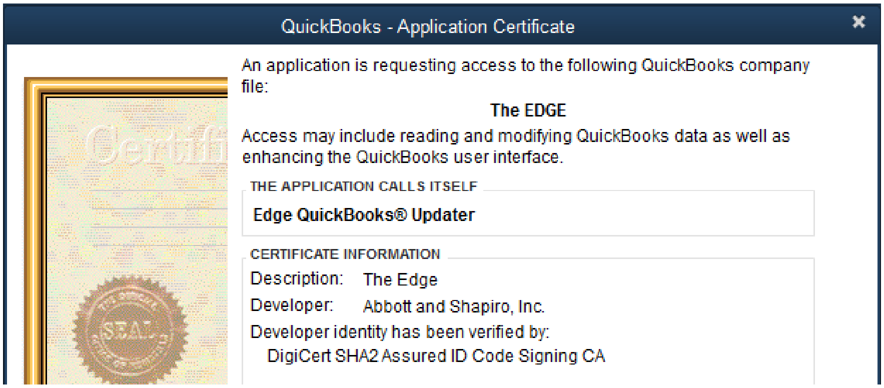
Example: In The Edge, items are entered with a cost value of the merchandise.
The Edge knows nothing of bench supplies, co-op advertising, credits, shipping costs, etc.
The Edge does not create the vendor invoice and has no direct link to Accounts Payable.

So if you add a single item to inventory from an invoice to The Edge, and the cost is $1,000.
The Edge posts a $1,000 debit to Inventory Edge and The Edge posts a $1,000 credit to Inventory QuickBooks.

At some point later the vendor bill is added to QuickBooks; for this example, the invoice is $1,050.00 ($1,000 in inventory and $50 in shipping). You must expense the $1,000 to inventory QuickBooks (to knock the balance in the Inventory Contra Asset Account back to 0). Expense the $50 to shipping or whatever expense account appropriate.

13.8.4 Common QuickBooks Errors

Error: This application has not accessed this QuickBooks company data file before. The QuickBooks administrator must grant an application permission to access a QuickBooks company data file for the first time.



QuickBooks - Application Certificate

An application is requesting access to the following QuickBooks company file:

The EDGE

Access may include reading and modifying QuickBooks data as well as enhancing the QuickBooks user interface.

THE APPLICATION CALLS ITSELF

Edge QuickBooks® Updater

CERTIFICATE INFORMATION

Description: The Edge

Developer: Abbott and Shapiro, Inc.

Developer identity has been verified by:

DigiCert SHA2 Assured ID Code Signing CA

Cause: The Edge does not have permission to access QuickBooks. This may happen after updating The Edge. You will probably be prompted to give permission.

Solution: Follow prompts to give the highest permission available. See the section in The Edge User Guide entitled QuickBooks Setup.

Error: “incMisc(accountName) is not set up”
Cause: There is a new Miscellaneous Sale Line setup that is being used at point of sale. This Miscellaneous Line is not associated with a QuickBooks account.
Solution: Select **Administrative ► QB ► Setup QB Integration ► MISC**. Then select and map the unmapped Misc. Line to an account in QuickBooks. See the section entitled QuickBooks Misc Items Tab for complete details.

Error: QBXML … There is an invalid reference to QuickBooks PaymentMethod "XYZ" in the ReceivePayment.

Cause: There is a payment method in The Edge that is not setup in QuickBooks. This may result in duplicate deposits.

Solution: Add a Payment Method in QuickBooks with the exact QuickBooks name as the payment method in The Edge. See the section entitled Mapping Payment Methods to QuickBooks for complete details. Additionally, to remove duplicate deposits:

1. Then, in QuickBooks, go to Banking> Make Deposits and deposit what you know to be real and factual.
2. This puts a checkmark on all the entries in undeposited funds leaving the duplicates as unchecked.
3. Go the chart of accounts and double click undeposited funds.
4. Scroll to the bottom (for the most recent)
5. Highlight the first UNCHECKED entry and press CTRL+D
6. Repeat for all remaining duplicates.

Error: GL Account "xyZ123" is not set up

Cause: A feature in The Edge is not mapped to a GL account (often because integration is incomplete).

Solution: Check the window at **Admin ► QB ► Setup QB Integration** and ensure every feature is mapped to a QuickBooks account. See the section entitled Mapping The Edge with QuickBooks Accounts for complete details.

Error: QBXML Status: Code = 3171, Severity = Error, Message = An attempt was made to modify a General Journal transaction with a date that is on or before the closing date of the company.

Solution: You will have to remove the closing date in order to post. To remove it:

1. From QuickBooks, select Edit then Preferences.
2. Select the Accounting tab then select Company Preferences.
3. Clear the closing date at the bottom.
4. Once the information has posted you can set the date again.
5. Check for duplicate deposits as described above.

Error: QBXML Status: Code = 3180, Severity = Error, Message = There was an error when saving a General Journal transaction. QuickBooks error message: You may not create or edit a transaction dated on or before the dividing date.

Cause: You are trying to post to QuickBooks, but there has been an accountants' copy made.

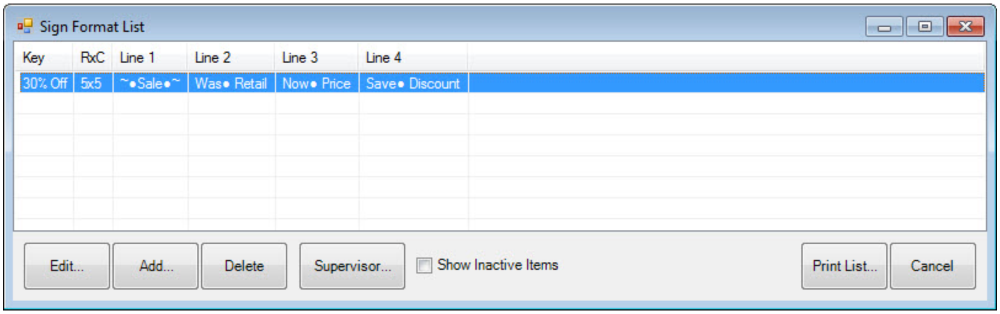
Solution: The accountants' copy should be merged back into your company file or the restrictions should be removed. Check for duplicate deposits as described above.

13.9 Sign Formats

13.9.1 Finding a Sign Format

To find a sign format record:

1. Select **Administrative** ► **Sign Formats**. The **Sales Sign Definitions** window containing a list of previously designed formats will appear.



Key	RxC	Line 1	Line 2	Line 3	Line 4
30% Off	5x5	~•Sale•~	Was• Retail	Now• Price	Save• Discount

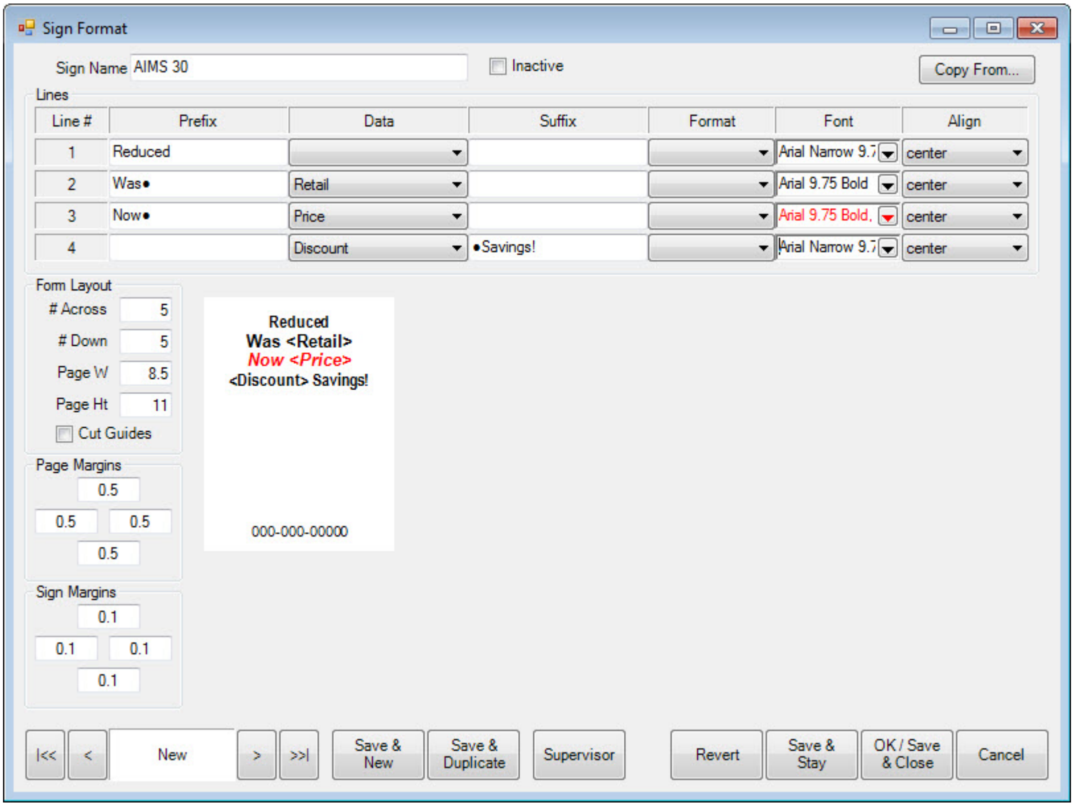
Fields in the **Sales Sign Definitions** list include:

Key	The sign name.
RxC	The number of signs or labels across (R for row) and down (C for column).
Line 1, **Line2**, etc.	The content of the sign.

13.9.2 Creating a New Sign Format

To create a new sign format:

1. To create a new sign layout, select **Add** from the **Sales Sign Definitions** window. The **New Sign** window will appear.



Sign Name AIMS 30 ☐ Inactive

Line #	Prefix	Data	Suffix	Format	Font	Align
1	Reduced				Arial Narrow 9.7	center
2	Was•	Retail			Arial 9.75 Bold	center
3	Now•	Price			Arial 9.75 Bold,	center
4		Discount	•Savings!		Arial Narrow 9.7	center

Across 5
Down 5
Page W 8.5
Page Ht 11
☐ Cut Guides

Page Margins: 0.5, 0.5, 0.5, 0.5

Sign Margins: 0.1, 0.1, 0.1, 0.1

Reduced
Was <Retail>
Now <Price>
<Discount> Savings!

000-000-00000

The options shown here are The Edge defaults and are designed to work for the forms available from an Edge partner supplier. Options for sign layout include:

Sign Name	The name for the layout for future use.
Copy From	Copies the information from another sign layout.
Lines	As if working down the page, takes the text and data to appear on each line of the sign. Fields include:

Line #	The line for which content is being defined.
Prefix	Static text to appear at the beginning of the line. For example: Sale, Clearance, Reduced, etc.
Data	Variable data to appear after the prefix.
Suffix	Static text to appear at the end of the line. For example: Off.
Format	Options for how numerical data should be presented.
Font	Offers a standard font and color selection dialog for each line.
Align	Options for centering or justifying text on the line.

Form Layout	Contains layout options: **# Across**: The number of signs across the printed page **# Down**: The number of signs down the printed page **Page W**: The width of the page in inches **Page Ht**: The length of the page in inches **Cut Guides**: Whether to show cutting guides.
Page Margins	Contains options for margins around the outside of the printed page
Sign Margins	Contains options for margins between signs laid out on the page.

Note that there is a preview of the sign based on the form definitions. In addition, there is a scroll option on the **Record Navigation Bar** for easy access to other sign definitions, which can be copied and modified.

2. Make changes to the default sizes or margins as desired.
3. Begin composing content by selecting a line number.
4. Enter text for the prefix to the data that might appear on the line.
5. Select the type of data to appear from the drop-down list: **Retail**, **Price**, or **Discount**.
6. Enter text that would follow the data.
7. Select a format for the data. For example, for a monetary amount, do you want a dollar sign to appear, do you want only whole dollar amounts or cents, too?
8. Select a font using the font dialog. Remember, it just applies to the current line.
9. Select an alignment: `left`, `right`, `center`, `fit`. `Fit` will cause the system to override the value set in the font dialog and make the text fit on the line.
10. Select a new line number and repeat steps 3 through 9 for each line of text.
11. To quickly move from line to line, click on that line on the small preview window.
12. Select a save option from the **Record Navigation Bar**.

Once sign formats are defined, they can be employed by selecting a format from Admin ► Start a Sale or Categories ► List ► Edit ► Pricing ► Automatic Markdown.

13.9.3 Editing a Sign Format

1. Locate the sign record as described above.
2. Select the record and select **Details**. The **Sign** window will appear as shown above.
3. Make changes to the fields and select an option from the **Record Navigation Bar**.

13.10 Rewards Program

This section describes The Edge Reward/Referral program, which helps you avoid discounting, retain valued customers, and acquire new customers. The Edge Reward/Referral Card Program is an extension of the Tender Card feature, and uses the same kind of tender card media for these two new purposes.

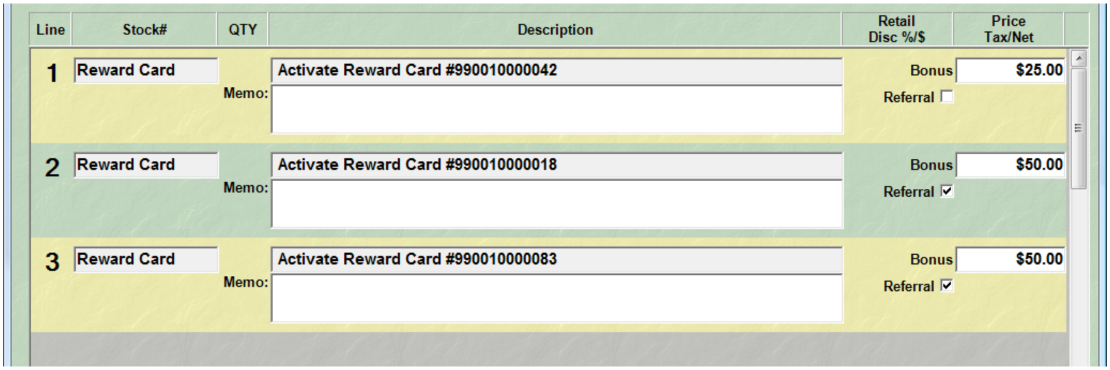
For a video tutorial about the Rewards and Referral programs, go to http://www.screencast.com/t/2nzjGmVi.

13.10.1 Rewards vs. Referral Cards

Rewards cards are designed as an incentive to encourage repeat sales to existing customers. Rewards cards increase in value each time a qualifying purchase is made; that value can be used towards a future purchase. Rewards cards can be issued to customers at the store owner's discretion.

Referral cards serve a purpose in addition to functioning as a rewards card. Referral cards are preloaded with a dollar value and given to good customers to give to their circle of friends and relatives who have the potential to become customers. Referral cards can only be used by new customers. The preloaded dollar amount is an inducement to get potentially good customer to visit your store. Referring customers are rewarded when referred customers spend a predetermined threshold amount. Referral cards are a great way to add qualified buyers to your customer base.

Low cost of customer acquisition, increased sales, and less discounting are three great reasons to consider this feature.



Line	Stock#	QTY	Description	Retail Disc %/$	Price Tax/Net
1	Reward Card	Memo:	Activate Reward Card #990010000042	Bonus Referral ☐	$25.00
2	Reward Card	Memo:	Activate Reward Card #990010000018	Bonus Referral ☑	$50.00
3	Reward Card	Memo:	Activate Reward Card #990010000083	Bonus Referral ☑	$50.00

In the above illustration, you see that we are issuing a reward card to an existing customer, with a $25 initial value, and also two $50 cards for him to give away.

13.10.2 Rewards Set Up

13.10.2.1 *Rewards Default Settings*

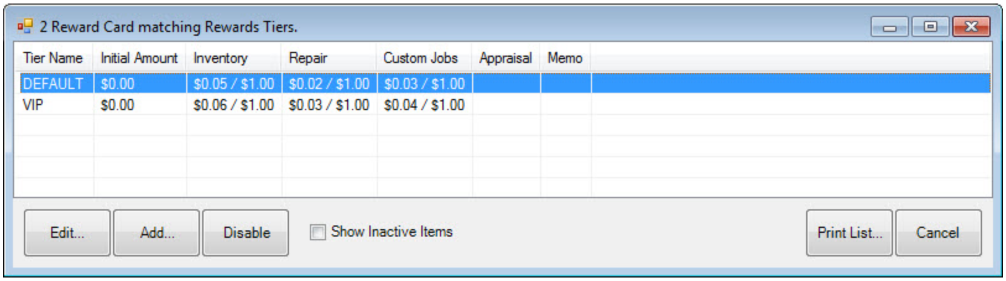
While **System Options** enable how The Edge operates, default settings define typical use of the Rewards/Referrals Program. Reward and referral settings are set up from the **Administrative** menu. There are three areas in which to set up rewards and referrals:

- Rewards/Tiers
- Assign Customer to Tiers
- Referral Program.

13.10.2.2 *Creating Rewards Types and Tiers*

To set up rewards and tiers:

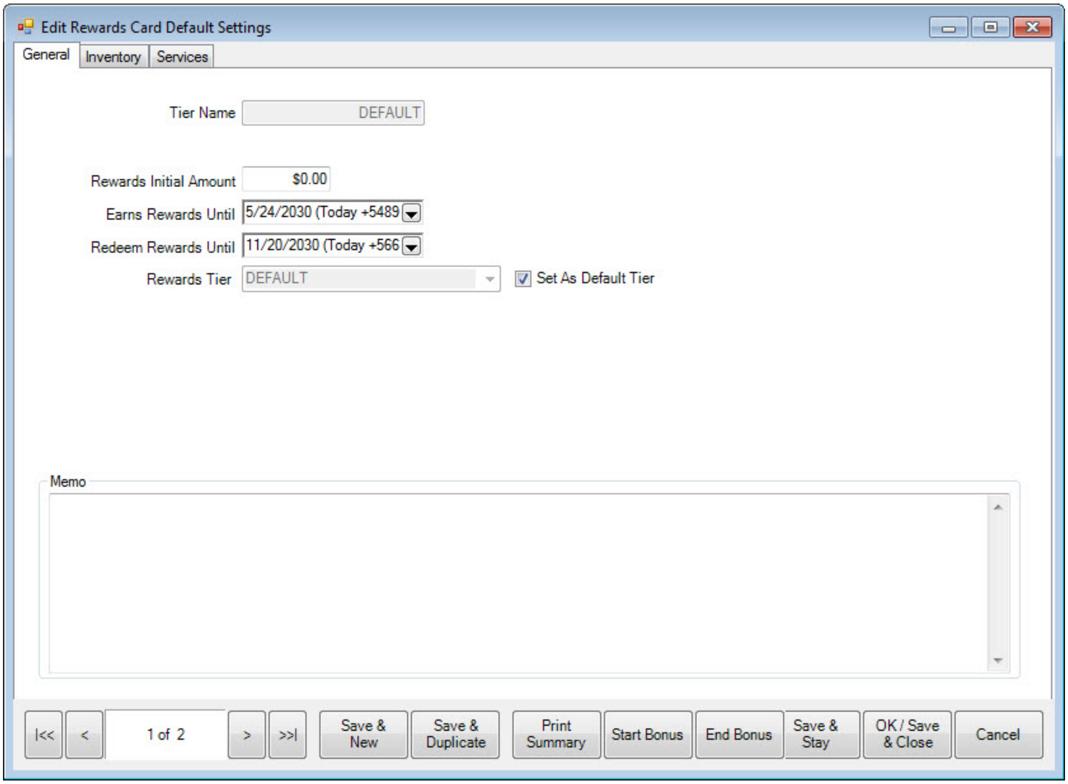
1. From the **Administrative** menu, select **Rewards Program ▶ Rewards/Tiers**. The **Reward Card** window will appear listing tier types. Tiers are reward levels, such as Gold, Platinum, etc. Tiers can be set up to define a category of sorts for rewards.



2 Reward Card matching Rewards Tiers.

Tier Name	Initial Amount	Inventory	Repair	Custom Jobs	Appraisal	Memo
DEFAULT	$0.00	$0.05 / $1.00	$0.02 / $1.00	$0.03 / $1.00		
VIP	$0.00	$0.06 / $1.00	$0.03 / $1.00	$0.04 / $1.00		

2. To add a tier, select **Add…**. The **New Rewards Tier** window will appear with the **General** tab open.



Tier Name: DEFAULT

Rewards Initial Amount: $0.00

Earns Rewards Until: 5/24/2030 (Today +5489

Redeem Rewards Until: 11/20/2030 (Today +566

Rewards Tier: DEFAULT

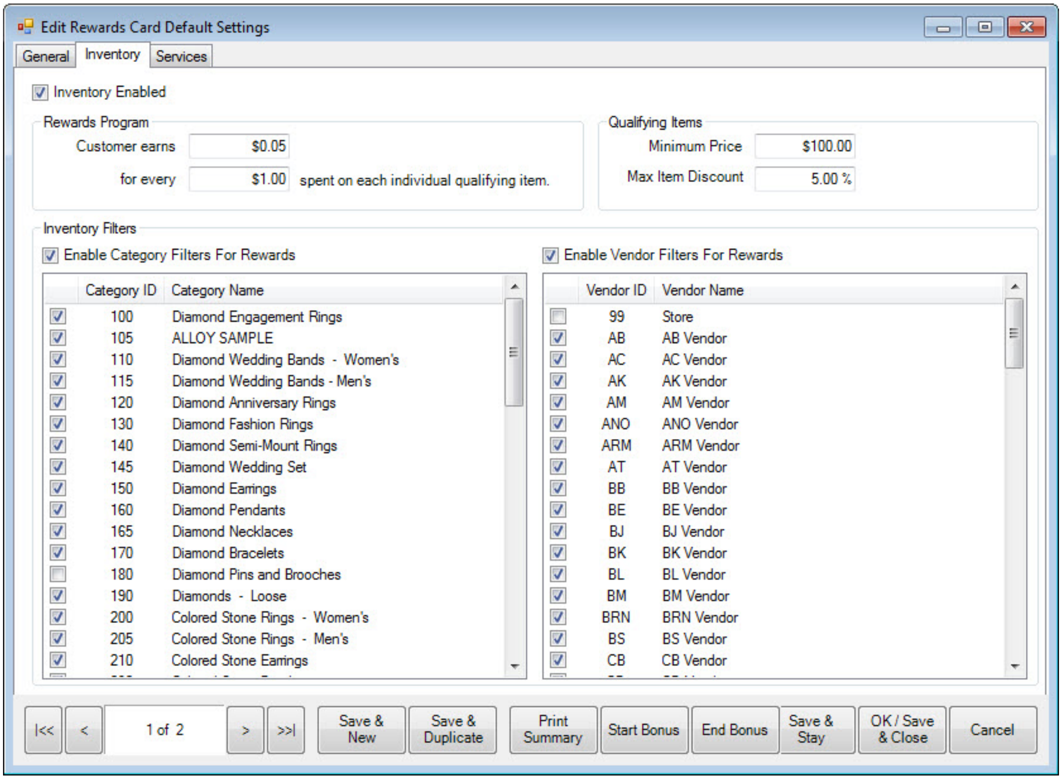
☑ Set As Default Tier

Fields and options in the **General** tab include:

Tier name	Enter a name for the tier being defined.
Rewards Initial Amount	The value that is initially on the rewards card for this tier when it is activated. At point of sale, you can change the value when activating a card; however, if it is over the maximum set in **System Options**, an override will be needed. If a card is activated at point of sale as a rewards card, this value is used. But if the card is activated as a referral card, then the referral initial amount is used. See the Referrals section below for more information.
Earns Rewards Until	The date at which cards in this tier stop earning rewards. We recommend using a rolling 365-day limit.
Referral Card Expiration Date	The date at which cards in this tier are no longer redeemable. We recommend using a rolling 365-day limit.

Set as Default Tier	Sets the selected tier to be the default for all new reward cards issued going forward.
Memo	A text field that allows you to enter any notes you may have.
Start Bonus	Allows you to set an additional reward percentage on specific items, for a specific date range, using the item filter. Tip! **To add bonus rewards on all qualifying items, leave the item filter blank.**
End Bonus	Allows you to cancel or stop any active rewards bonus. Tip! **If you've made a mistake setting up bonus rewards, end bonus makes it easy to cancel that bonus and start over.**

3. Complete fields in the **General** tab as desired.
4. Select the **Inventory** tab.



☑ Inventory Enabled

Rewards Program

Customer earns $0.05

for every $1.00 spent on each individual qualifying item.

Qualifying Items

Minimum Price $100.00

Max Item Discount 5.00 %

Inventory Filters

☑ Enable Category Filters For Rewards

	Category ID	Category Name
☑	100	Diamond Engagement Rings
☑	105	ALLOY SAMPLE
☑	110	Diamond Wedding Bands - Women's
☑	115	Diamond Wedding Bands - Men's
☑	120	Diamond Anniversary Rings
☑	130	Diamond Fashion Rings
☑	140	Diamond Semi-Mount Rings
☑	145	Diamond Wedding Set
☑	150	Diamond Earrings
☑	160	Diamond Pendants
☑	165	Diamond Necklaces
☑	170	Diamond Bracelets
☐	180	Diamond Pins and Brooches
☑	190	Diamonds - Loose
☑	200	Colored Stone Rings - Women's
☑	205	Colored Stone Rings - Men's
☑	210	Colored Stone Earrings

☑ Enable Vendor Filters For Rewards

	Vendor ID	Vendor Name
☐	99	Store
☑	AB	AB Vendor
☑	AC	AC Vendor
☑	AK	AK Vendor
☑	AM	AM Vendor
☑	ANO	ANO Vendor
☑	ARM	ARM Vendor
☑	AT	AT Vendor
☑	BB	BB Vendor
☑	BE	BE Vendor
☑	BJ	BJ Vendor
☑	BK	BK Vendor
☑	BL	BL Vendor
☑	BM	BM Vendor
☑	BRN	BRN Vendor
☑	BS	BS Vendor
☑	CB	CB Vendor

Fields and options in the **Inventory** tab include:

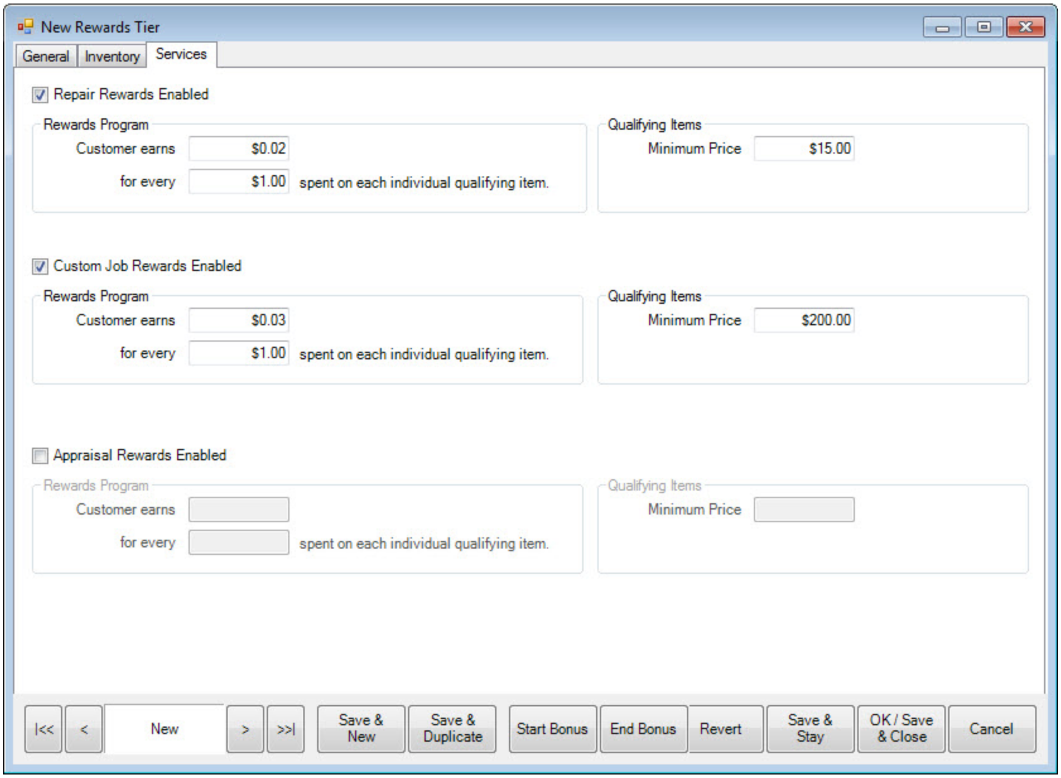
Inventory Enabled	Enables the option to specify which inventory earns rewards.
Customer Earns…	The values that are used to calculate how much a customer earns in rewards for every unit of money spent. For instance, if a customer can earn .06 for every dollar spent, on a $21.00 sale, the customer would earn $1.26 in rewards.
Minimum Price	The lowest amount for which an item sold can accrue rewards. The $21.00 item would earn rewards if the **Minimum Price** is set to $20.00. However, if **Minimum Price** is set to $25.00, the $21.00 sale would not earn rewards.
Max Item Discount	The maximum percentage that an item can be discounted and still count towards the rewards program. This is calculated by taking the price for which the item is sold and comparing it with the retail price. If an item has a retail price of $100.00 and it is sold for $70.00, the discount would be 30 percent.

Print Summary	The **Print Summary** button allows you to print the tier's settings for reference.
Category Filters	Only available for the default tier. If enabled, allows you to select which categories pay out rewards. If you check the box, the items in this category will pay rewards. If you uncheck the box, it will not pay rewards.
Vendor Filters	Only available for the default tier. If enabled, allows you to indicate that items from specific vendors pay out rewards. If you check the box, the items from this vendor will pay rewards. If you uncheck the box, it will not pay rewards.

Tip! **For filters, if you want to select all or none, right click and select Check All or Check None.**

Important! **If you're using both category and vendor filters, an item will only receive rewards if both the vendor and category for that item are marked selected for the rewards program.**

5. Complete fields in the **Inventory** tab as desired.
6. Select the **Services** tab.



☑ Repair Rewards Enabled

Rewards Program
Customer earns $0.02
for every $1.00 spent on each individual qualifying item.

Qualifying Items
Minimum Price $15.00

☑ Custom Job Rewards Enabled

Rewards Program
Customer earns $0.03
for every $1.00 spent on each individual qualifying item.

Qualifying Items
Minimum Price $200.00

☐ Appraisal Rewards Enabled

Rewards Program
Customer earns
for every spent on each individual qualifying item.

Qualifying Items
Minimum Price

The **Services** tab functions the same as the **Inventory** tab but allows rewards to be paid out on specified repairs, custom jobs, and appraisal service.

7. Complete fields in the **Services** tab as desired.
8. Select **OK/Save & Close**.

Add additional tiers if you plan to reward customers at different levels. For example:

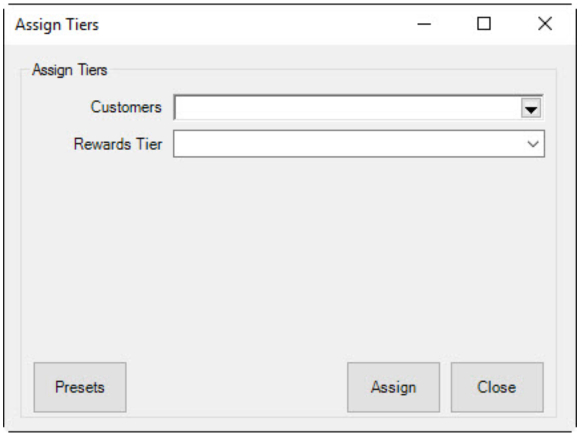
- Tier 1 may pay $.03 for every 1.00 spent
- Tier 2 may pay $.05 for every 1.00 spent.

When adding a new tier, the same field definitions apply except the category and vendor filters. Category and vendor filters are specified under the default tier only. The same category and vendor filter applies to all rewards tiers.

13.10.2.3 Assigning Customers to Tiers

Customers can be reassigned to different tiers at any time. Tier assignment will appear on the customer record **Rewards** tab so it is easy to see when the level of rewards was changed. To assign existing customers to tier levels:

1. From the **Administrative** menu, select **Rewards Program** ► **Assign Customers to Tiers**. The **Assign Tiers** window will appear.



2. Use the **Customers** field to filter and select the customers to assign.
3. Use the **Rewards Tier** drop-down menu to select the tier to which the selected customers should be assigned.
4. Select **Assign**. A list of customers meeting the filter requirements will appear.
5. Check the customers to assign.
6. Select **OK**. A confirmation dialog will appear.
7. Select **OK**.
8. Close the **Assign Tiers** window by selecting **Done**.

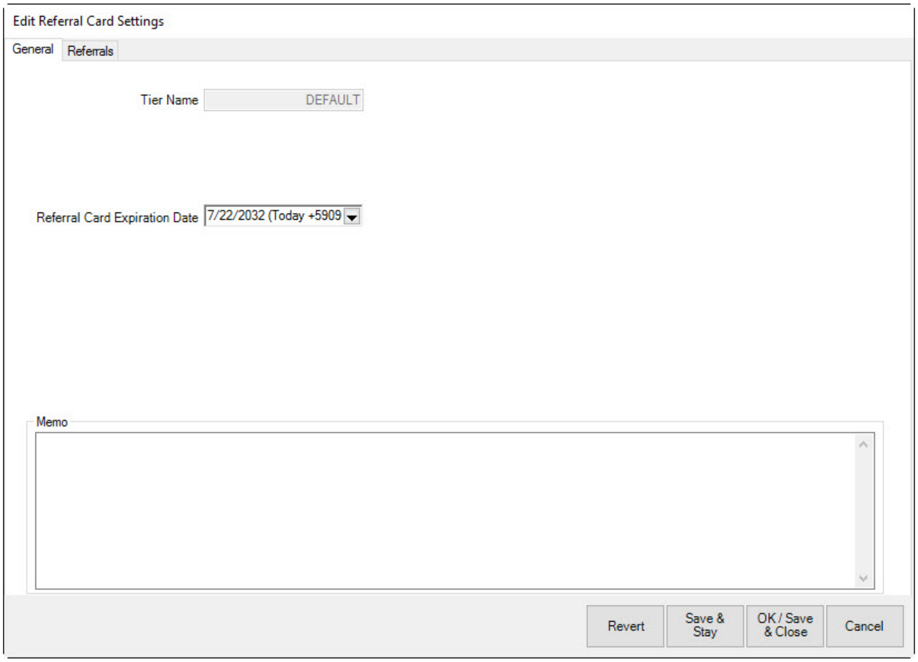
When selecting customers whose tier you wish to change, consider utilizing the Group / Mailing List button in the bottom left to save these customers to a mailing list so they can be notified of the tier change.

When rewards assigning tiers, if no customer filters are set, a confirmation asking if you wish to assign all customers will appear.

13.10.2.4 Referral Cards

To work with referral cards:

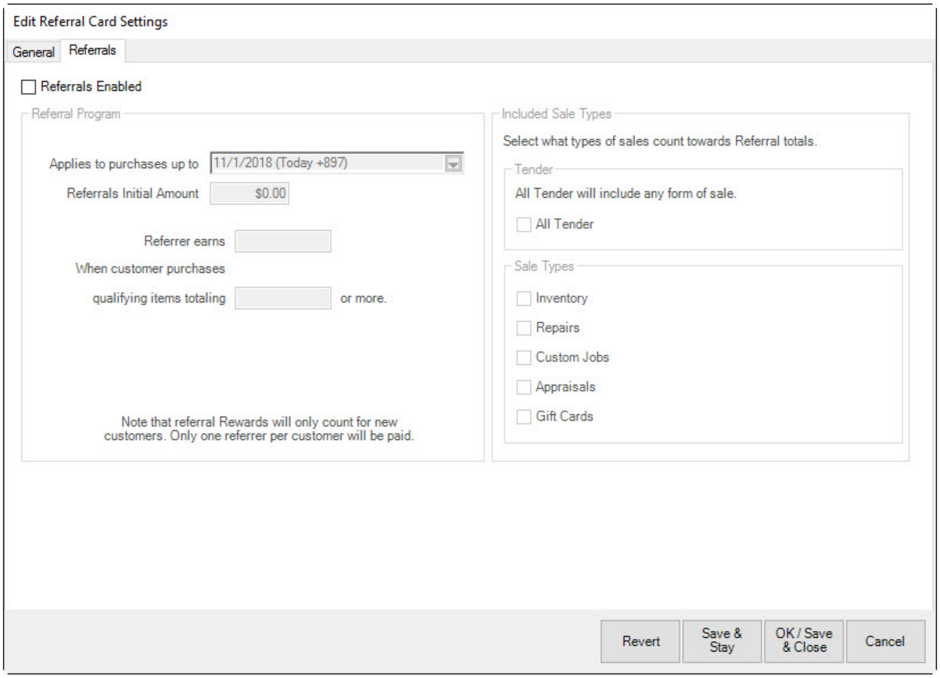
1. From the **Administrative** menu, select **Rewards Program** ► **Referral Program**. The **Edit Referral Card Settings** window will appear with the **General** tab open.


Edit Referral Card Settings

Tier Name DEFAULT

Referral Card Expiration Date 7/22/2032 (Today +5909

2. Because this is the setup area, the card number is not applicable. These settings will be applied to each newly issued card as the default.
3. Select a redeem rewards date from the **Referral Card Expiration Date** drop-down menu.
4. Select the **Referrals** tab.



☐ Referrals Enabled

Applies to purchases up to 11/1/2018 (Today +897)

Referrals Initial Amount $0.00

Referrer earns

When customer purchases qualifying items totaling or more.

Note that referral Rewards will only count for new customers. Only one referrer per customer will be paid.

Select what types of sales count towards Referral totals.

All Tender will include any form of sale.

☐ All Tender

☐ Inventory

☐ Repairs

☐ Custom Jobs

☐ Appraisals

☐ Gift Cards

Fields and options in the **Referrals** tab include:

Referrals Enabled	Allows you to enable the referrals feature.
Applies to purchases up to	The date until which the referral card generates referral bonus money to the referrer. The referee can only use the referral one time. After that, the card becomes a rewards card for the referee.
Referral initial amount	The amount that is initially on the referral card. This value is different than the rewards initial amount. If a card is activated at point of sale as a referral card, the value set here is used. If a card is activated as a rewards card, the rewards initial amount is used. If a card is activated through **Customers ► Rewards ► Activate**, this value is used as the initial amount if the referrals are enabled.
Referrer earns	The amount that the referring customers will earn as a credit memo when the customer has spent the allotted amount as set in the next field.
When customer purchases… qualifying items totaling	The allotted amount that must be spent by the referred customer in order for the referring customer to earn a credit. This value can be set to 0 if you just want to pay a referral credit out for anyone that comes in and uses the card.

Sale Types	Allows you to filter what types of sales count towards the qualifying items totals. Example: If you want to include repairs, not just inventory. Checking All Tender will disable filtering by sale types.

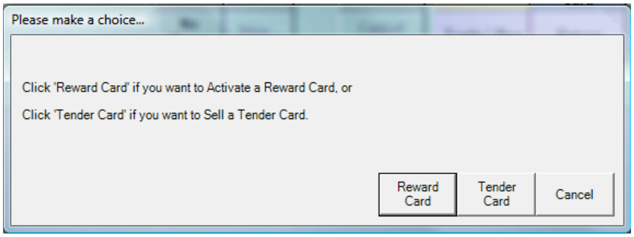
13.10.3 Activating Rewards Cards

There are two ways to activate rewards and referral cards: Through point of sale and through the **Rewards** menu.

Only one original value will be used for the card. Initial amounts are now locked on records. If for some reason they need to be unlocked and changed, which we strongly advise against, the supervisor menu has a lock and unlock function for the original amounts on it.

13.10.3.1 Scan New Rewards/Referral Card at Point of Sale

The easiest way to activate a new card at point of sale is to scan it. It is not necessary to select any buttons before scanning the card. Note that the prefix numbers in the card indicate whether it is a Reward Card or Tender Card. If you have not specified prefixes in **System Options** for reward cards vs. tender cards, then a prompt to indicate what type of card you want to activate.



Please make a choice...

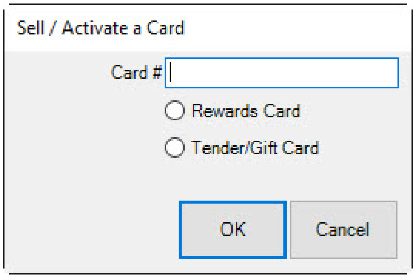
Click 'Reward Card' if you want to Activate a Reward Card, or

Click 'Tender Card' if you want to Sell a Tender Card.

After you make your selection (or immediately after scanning, if you have specified prefixes), a **Reward Card** or **Tender Card** line will be added to the sale.

13.10.3.2 Using the Activate Card Button

1. From the **Point of Sale** window, select the **Sell/Activate Card** option. The **Sell/Activate a Card** window will appear.



2. Scan the card or type in the card number.
3. If prefixes that specify card type are set in **System Options**, you can proceed with entering the value. If not, you will be prompted to select the card type (if necessary), and select OK, then a line will be added to the sale.

1 Reward Card

Activate Reward Card #993000005351

Bonus $0.00

- **If the rewards card is already active, an error message will appear.**
- **If the customer to whom you are trying to assign the rewards card already has a rewards card, you will be prompted to consolidate the rewards to this new card; the old card will become inactive.**
- **If you are assigning a new rewards card, you cannot ring out any merchandise or services on the same transaction.**

4. The initial amount/bonus amount will be taken from your default setup and added to the resulting sale line. Otherwise, enter the card value.

13.10.4 Accruing Rewards

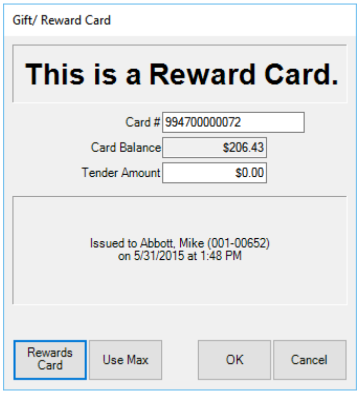
At point of sale there is a rewards button that appears up by the customer's name. This will bring up a picker that shows all the sale items that qualify for rewards and the amounts that would be earned. If you want to exclude some item on the sale from earning rewards, uncheck the box next to the item and it will not earn rewards.

To adjust a customer's rewards amount, go to the customer record and adjust the balance. This will write out a history row for traceability.

After loading a customer at point of sale, you can select **Rewards** and the form title will have his or her balance in it.

13.10.4.1 Identifying the Customer at Point of Sale

Rewards are accrued by identifying the customer via his reward card. This can be done by scanning the card at point of sale. Instead of searching for the customer record, you can scan the customer's reward card. The customer will be identified, and the **Tender/Reward** card window will appear showing the card balance and also any notes you may have added to the card record. You can dismiss the pop-up window by selecting **Cancel** or by pressing the **ESC** key on your keyboard.



Gift/ Reward Card

This is a Reward Card.

Card # 994700000072

Card Balance $206.43

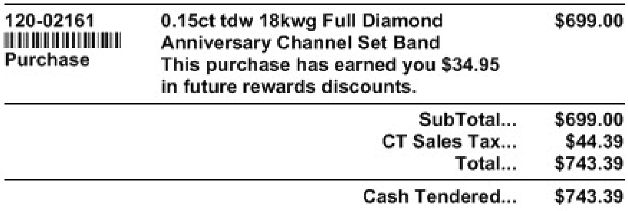
Tender Amount $0.00

Issued to Abbott, Mike (001-00652)
on 5/31/2015 at 1:48 PM

Note that if this is a referral card, and this is a new customer, then of course the card will not automatically identify the customer, but, having scanned the card, you can see who the referrer was and the balance on the card. As soon as you enter the new customer, the card will be associated with that customer and the customer can be automatically identified by the card on the next visit.

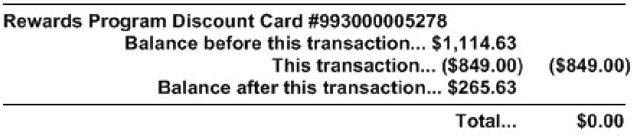
Whenever a rewards card is associated with the current sale, the card number will appear above the customer name as shown below. Notice that the Rewards button appears, indicating that the customer has rewards available.

If a rewards card is issued to a particular customer, then that customer will accrue purchase rewards every time they make a qualifying purchase, whether or not they present the card at each visit. Each qualifying item on the receipt will indicate the reward earned.



120-02161 Purchase	0.15ct tdw 18kwg Full Diamond Anniversary Channel Set Band This purchase has earned you $34.95 in future rewards discounts.	$699.00
	SubTotal...	$699.00
	CT Sales Tax...	$44.39
	Total...	$743.39
	Cash Tendered...	$743.39

If you have selected the option to show balances on receipts, then reward card balances will be included in that section.



Rewards Program Discount Card #993000005278
Balance before this transaction... $1,114.63
This transaction... ($849.00) ($849.00)
Balance after this transaction... $265.63

Total... $0.00

13.10.5 Redeeming Rewards

13.10.5.1 Purchase Rewards

Because purchase rewards are posted to a specific rewards card, the only way to spend the reward is to take the reward card as tender.

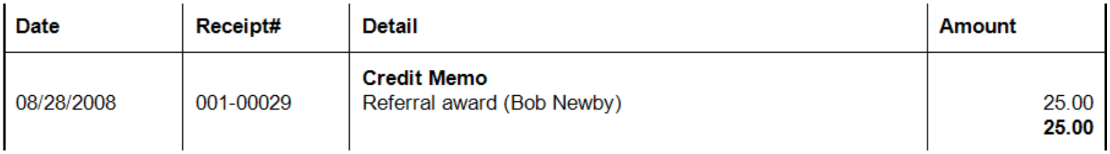
13.10.5.2 Referral Rewards

Because referral rewards are posted to the referring customer's credit memo account, the only way to spend referral rewards is to use the customer's credit memo account as tender.

13.10.6 Rewards Program Reporting

13.10.6.1 Customer Statements

Referral awards show up on the referring customer's statement under the credit memo account. The credit will be identified as to who the new customer was.



Date	Receipt#	Detail	Amount
08/28/2008	001-00029	**Credit Memo** Referral award (Bob Newby)	25.00 **25.00**

13.10.6.2 Rewards-Specific Reports

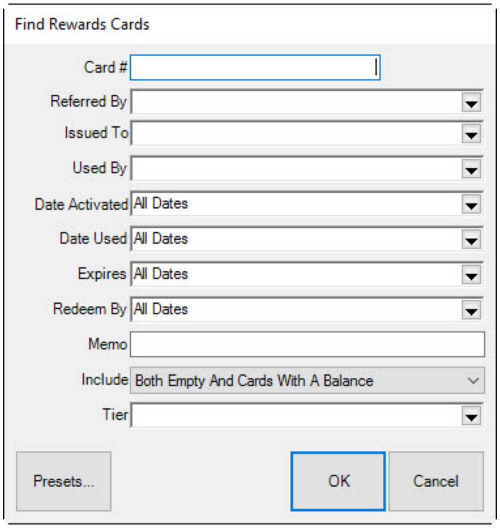
Rewards-specific reports are not yet implemented. The resulting list from the **Find** function will serve until reporting is implemented.

13.10.7 Administrative Rewards Functions

13.10.7.1 Find Card Records

To look up the details of one or more reward/referral card:

1. From the **Customer** menu, select **Rewards** ► **Find**. The **Find** window will appear.



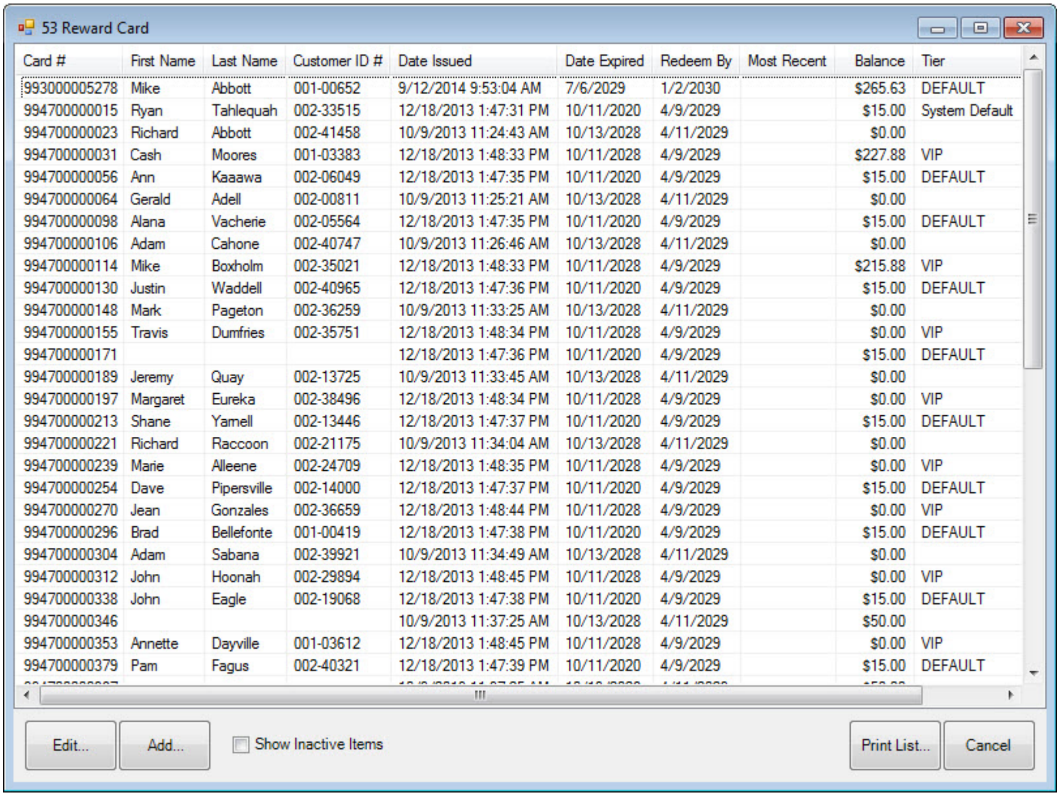
Find Rewards Cards

Date Activated: All Dates
Date Used: All Dates
Expires: All Dates
Redeem By: All Dates
Include: Both Empty And Cards With A Balance

Fields and options in the **Find Rewards Card** window include:

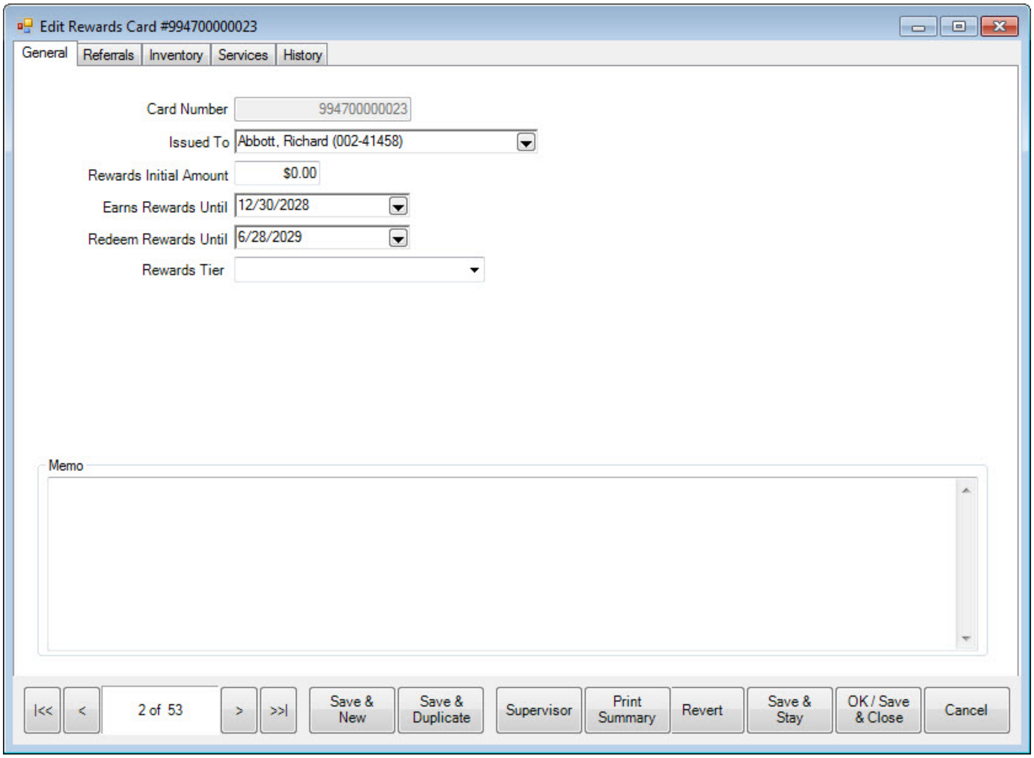
Card #	Returns a card specified by typing in the number or scanning the card.
Referred By	Returns records of referral cards by the customer who had them to give away.
Issued To	Returns records of cards according to the customer to whom they were issued.
Used By	Returns records of cards according to the customer who redeemed them.
Date Activated	Returns cards activated during a specified date range.
Date Used	Returns cards used within a specified date range.
Expires	Returns cards set to expire during a specified date range.
Redeem By	Returns cards that must be redeemed by a specified date range.
Memo	Returns records that have a keyword in the memo.
Include	Returns cards that have a balance.
Tier	Returns cards that fall into a specified tier.

2. Complete the filters as desired.
3. Select **OK**. A list of matching card records will appear.



Card #	First Name	Last Name	Customer ID #	Date Issued	Date Expired	Redeem By	Most Recent	Balance	Tier
993000005278	Mike	Abbott	001-00652	9/12/2014 9:53:04 AM	7/6/2029	1/2/2030		$265.63	DEFAULT
994700000015	Ryan	Tahlequah	002-33515	12/18/2013 1:47:31 PM	10/11/2020	4/9/2029		$15.00	System Default
994700000023	Richard	Abbott	002-41458	10/9/2013 11:24:43 AM	10/13/2028	4/11/2029		$0.00	
994700000031	Cash	Moores	001-03383	12/18/2013 1:48:33 PM	10/11/2028	4/9/2029		$227.88	VIP
994700000056	Ann	Kaaawa	002-06049	12/18/2013 1:47:35 PM	10/11/2020	4/9/2029		$15.00	DEFAULT
994700000064	Gerald	Adell	002-00811	10/9/2013 11:25:21 AM	10/13/2028	4/11/2029		$0.00	
994700000098	Alana	Vacherie	002-05564	12/18/2013 1:47:35 PM	10/11/2020	4/9/2029		$15.00	DEFAULT
994700000106	Adam	Cahone	002-40747	10/9/2013 11:26:46 AM	10/13/2028	4/11/2029		$0.00	
994700000114	Mike	Boxholm	002-35021	12/18/2013 1:48:33 PM	10/11/2028	4/9/2029		$215.88	VIP
994700000130	Justin	Waddell	002-40965	12/18/2013 1:47:36 PM	10/11/2020	4/9/2029		$15.00	DEFAULT
994700000148	Mark	Pageton	002-36259	10/9/2013 11:33:25 AM	10/13/2028	4/11/2029		$0.00	
994700000155	Travis	Dumfries	002-35751	12/18/2013 1:48:34 PM	10/11/2028	4/9/2029		$0.00	VIP
994700000171				12/18/2013 1:47:36 PM	10/11/2020	4/9/2029		$15.00	DEFAULT
994700000189	Jeremy	Quay	002-13725	10/9/2013 11:33:45 AM	10/13/2028	4/11/2029		$0.00	
994700000197	Margaret	Eureka	002-38496	12/18/2013 1:48:34 PM	10/11/2028	4/9/2029		$0.00	VIP
994700000213	Shane	Yamell	002-13446	12/18/2013 1:47:37 PM	10/11/2020	4/9/2029		$15.00	DEFAULT
994700000221	Richard	Raccoon	002-21175	10/9/2013 11:34:04 AM	10/13/2028	4/11/2029		$0.00	
994700000239	Marie	Alleene	002-24709	12/18/2013 1:48:35 PM	10/11/2028	4/9/2029		$0.00	VIP
994700000254	Dave	Pipersville	002-14000	12/18/2013 1:47:37 PM	10/11/2020	4/9/2029		$15.00	DEFAULT
994700000270	Jean	Gonzales	002-36659	12/18/2013 1:48:44 PM	10/11/2028	4/9/2029		$0.00	VIP
994700000296	Brad	Bellefonte	001-00419	12/18/2013 1:47:38 PM	10/11/2020	4/9/2029		$15.00	DEFAULT
994700000304	Adam	Sabana	002-39921	10/9/2013 11:34:49 AM	10/13/2028	4/11/2029		$0.00	
994700000312	John	Hoonah	002-29894	12/18/2013 1:48:45 PM	10/11/2028	4/9/2029		$0.00	VIP
994700000338	John	Eagle	002-19068	12/18/2013 1:47:38 PM	10/11/2020	4/9/2029		$15.00	DEFAULT
994700000346				10/9/2013 11:37:25 AM	10/13/2028	4/11/2029		$50.00	
994700000353	Annette	Dayville	001-03612	12/18/2013 1:48:45 PM	10/11/2028	4/9/2029		$0.00	VIP
994700000379	Pam	Fagus	002-40321	12/18/2013 1:47:39 PM	10/11/2020	4/9/2029		$15.00	DEFAULT

4. Select the record with which you wish to work.
5. Double click or select **Edit**. The **Edit Rewards Card** window will appear.



Card Number: 994700000023
Issued To: Abbott, Richard (002-41458)
Rewards Initial Amount: $0.00
Earns Rewards Until: 12/30/2028
Redeem Rewards Until: 6/28/2029
Rewards Tier:

The **General** tab shows the use of the card. The **Inventory**, **Services**, and **Referrals** tabs break down what the customer should earn for each type of sale. Note the defaults will be used unless otherwise specified.

The **History** tab shows when the card was used at point of sale. Both qualifying purchases and redemptions are listed. To see qualifying purchases, select **See Item** or **See Sale**. Note that **See Item** is not enabled for redemptions because redeeming rewards is treated as tender and is not strictly associated with the item or items that were purchased with the reward.

6. Make changes as needed and select a save option.

13.10.7.2 Rewards Supervisor Functions

Below are procedures for some common supervisory functions.

13.10.7.2.1 Balance Adjustments

Reward card balances can be adjusted on the **Customer Edit** window in the **Balances** tab, just like any other balance.

13.10.7.2.2 Void a Card

To void a card, adjust the balance down to zero, then remove the customer name.

13.10.7.2.3 Replace a Lost or Stolen Card

To replace a lost or stolen card, select **Replace** from the **Supervisor** menu.

13.10.7.2.4 Merge Cards

To merge two cards, void one of them as above, and then adjust the balance of the other card.

13.10.8 QuickBooks Integration of Rewards Cards

Referral rewards are immediately credited to the referring customer's credit memo account. As such, in your General Ledger, it will be posted as a liability in your account that corresponds to our **Liabilities ► Store Credits** account. This will be offset by an expense in your account that corresponds to our **Expense ► Referral Fees** account.

Purchase rewards are not a true liability as they are only a promise of a future discount (one that can expire), similar to a coupon. As such, purchase rewards are not posted to the General Ledger until they are redeemed. When a customer redeems a purchase reward, it will be posted as an expense in your account that corresponds to our **Expense ► Rewards** account.

For more about mapping to QuickBooks, see the section entitled Mapping The Edge with QuickBooks Accounts.

It is ***strongly recommended*** that you make an appointment with support@ajsllc.com to adjust your Edge/QuickBooks setup for the rewards program.

13.10.9 Rewards Program FAQs

Should I buy different media for my reward cards vs. my tender cards?
We ***strongly*** recommend it. Even though tender cards and rewards cards use the same type of media, they operate quite differently, and it is important for both you and your customers to be able to distinguish between them.

If for some reason you must use a tender card as a reward card, please consider identifying the reward card with some permanent mark, such as an unusually shaped hole punch.

What if somebody returns an item?
If the item was bought with rewards, the rewards will be returned to the rewards card of the customer ***returning*** the item. If the item earned rewards, the rewards will be removed from the card they were ***awarded*** to.

What if I void a sale?
Whatever effect the sale had on rewards will be undone.

13.11 Notifications

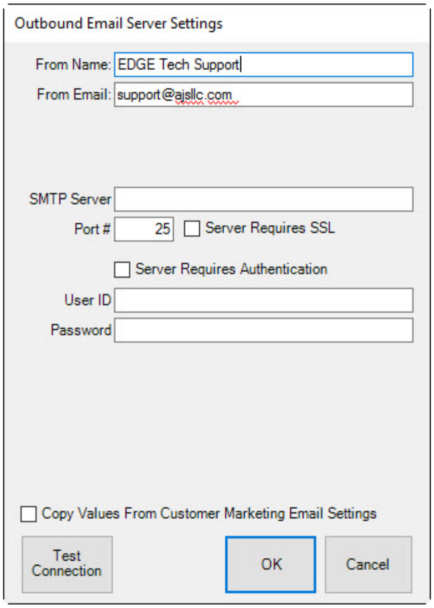
Customers can be notified via email or text message of completed services, such as repairs, special orders, or appraisals. Customers can opt to receive notifications of completed services via email or text. No need for associates to manual calls and no need for your customers to call you. Take advantage of electronic notifications for the convenience of your customers. For example, rather than tell a customer to come back in an hour, you can tell them you'll send an email or text when his or her order is ready.

13.11.1 Configuring Email Settings for Notifications

Email and test message notifications require setup. The Edge must be configured to use the email settings associated with your store email account. The fields marked with an asterisk below are specific to your email account. You should contact your email vendor or ISP (Internet service provider) and ask them specifically for this information.

To configure email settings to your SMTP server for Notifications:

1. Select **Administrative ► Email Settings ► Notifications**. The **Outbound Email Server Settings** window will appear.


Outbound Email Server Settings

From Name: EDGE Tech Support

From Email: support@ajsllc.com

SMTP Server

Port # 25 ☐ Server Requires SSL

☐ Server Requires Authentication

User ID

Password

☐ Copy Values From Customer Marketing Email Settings

Fields to be completed in the **Outbound Email Server Settings** window include:

From Name	The name that you want to appear as the sender of the receipt. This will probably be your store name.

From Email	The email address from which the receipt is being sent. This will be your store email account.
SMTP Server*	The outbound server as provided by your email provider. It will probably be an SMTP account.
Port #*	The port number with which your email interacts.
Server Requires SSL*	Whether the outgoing server requires a secure socket layer.
Server Requires Authentication*	Whether the outgoing server requires authentication.
User ID*	The email account's user ID.
Password*	The password for the email account.

13.11.2 Configuration of Text Message Settings

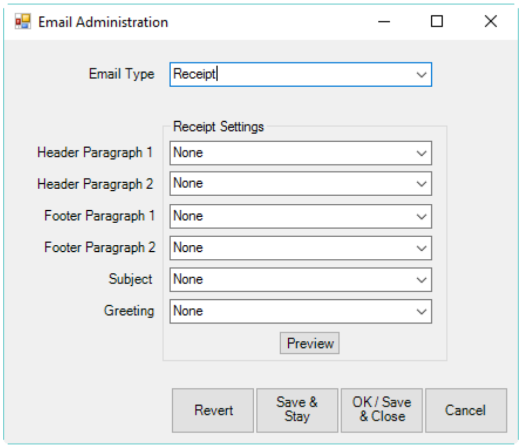
You can send notifications by text message to customers. Text messaging is a feature that must be activated by The Edge Customer Support. To use text messaging for notifications, contact admin@ajsllc.com. If you sign up, you'll be issued a new license, and then you need only enable the feature.

13.11.3 Email Administration

Before you can begin setting up and sending emails, you must configure the email function. For more information, see the section entitled Configuring Email Settings for Notifications. Also, you must define the content of these items is described in the section entitled Email Headers and Footers.

For email notifications, for each kind of service notification, you can select the header, footer, subject line, and greeting to automatically populate emails. To do so:

1. Select **Administrative** ► **Notifications** ► **Email Administration**. The **Email Administration** window will appear.



Email Type: Receipt

Receipt Settings

Header Paragraph 1: None
Header Paragraph 2: None
Footer Paragraph 1: None
Footer Paragraph 2: None
Subject: None
Greeting: None

2. Select the email notification type from the drop-down window:

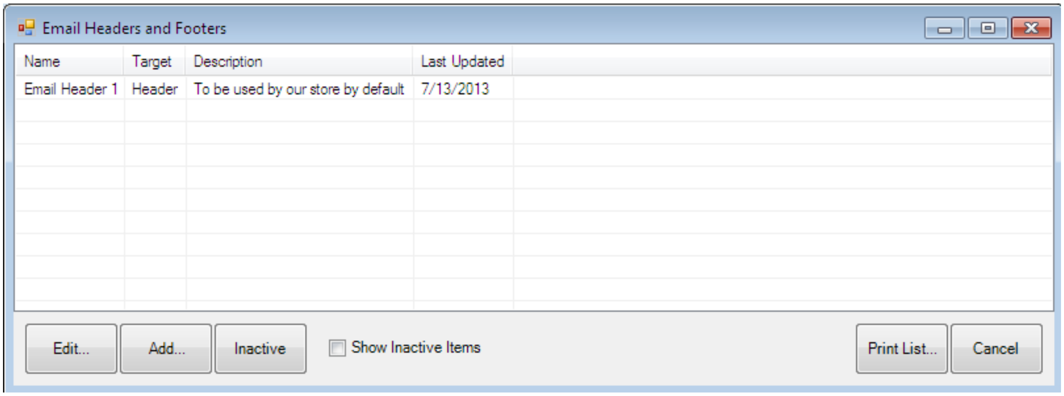
   - Receipt
   - Repair Done
   - Custom Job Done
   - Appraisal Done
   - Special Order Done
   - Wish List Saved
   - New Appointment
   - Today's Appointments
   - Wish List Being Emailed.

3. For each of header, footer, subject, and greeting, select the content as desired (the content for each of these must be created as described in the section entitled Email Headers and Footers and the section entitled Email Subjects and Greetings).
4. Select **Preview** to see how the resulting email will appear.
5. Go back and make changes as needed.
6. Select **OK/Save and Close**.

13.11.4 Email Headers and Footers

To create the content of headers and footers:

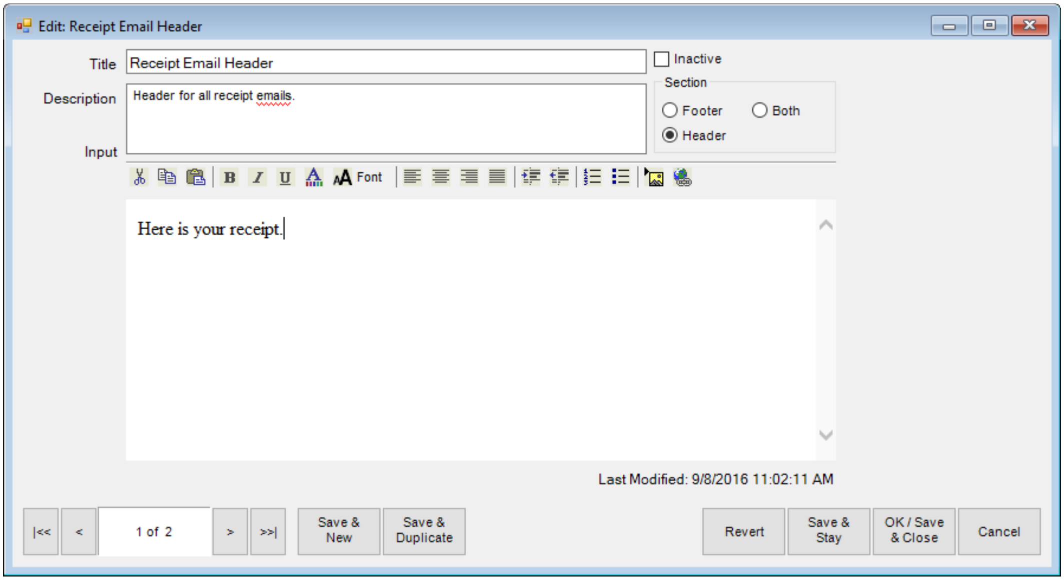
1. Select **Administrative** ► **Notifications** ► **Email Headers and Footers**. The **Email Headers and Footers** window will appear.



Name	Target	Description	Last Updated
Email Header 1	Header	To be used by our store by default	7/13/2013

☐ Show Inactive Items

2. Select **Add**. The **Edit Email Header** window will appear.



Title: Receipt Email Header

☐ Inactive

Description: Header for all receipt emails.

Section: ○ Footer ○ Both ● Header

Input: Here is your receipt.

Last Modified: 9/8/2016 11:02:11 AM

1 of 2

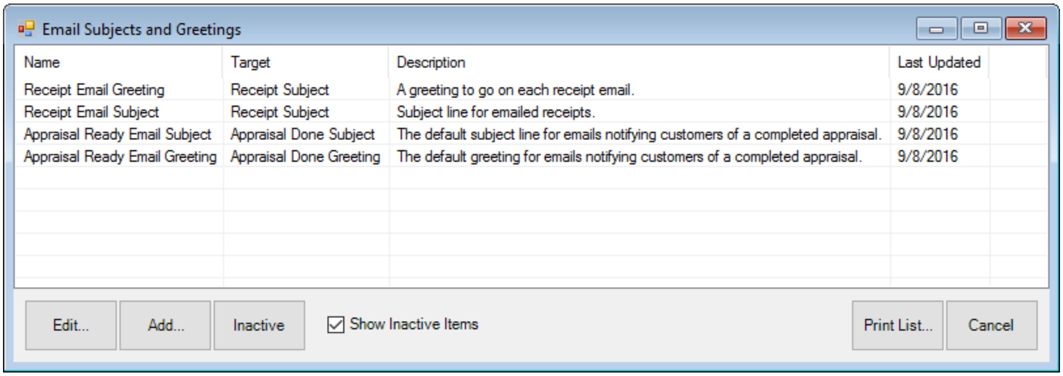
3. Enter a meaningful name in the **Title** field.
4. Enter a description of the header or footer in the **Description** field.
5. Enter the content of the header or footer in the **Input** field. For example, you may want each email to go out with header at the top that reads, "Your receipt from today's purchase." Or a footer that reads, "Thank you for your business."
6. Repeat creation of these headers and footers for all email scenarios as listed in the section entitled Email Administration.
7. Select **OK/Save and Close**.

The new header or footer will appear in the **Email Administration** window to be assigned to an email type.

13.11.5 Email Subjects and Greetings

Subjects appear in the subject line of an email. Greetings allow you to enter a salutation or greeting to the email. To create automated subject lines and email content:

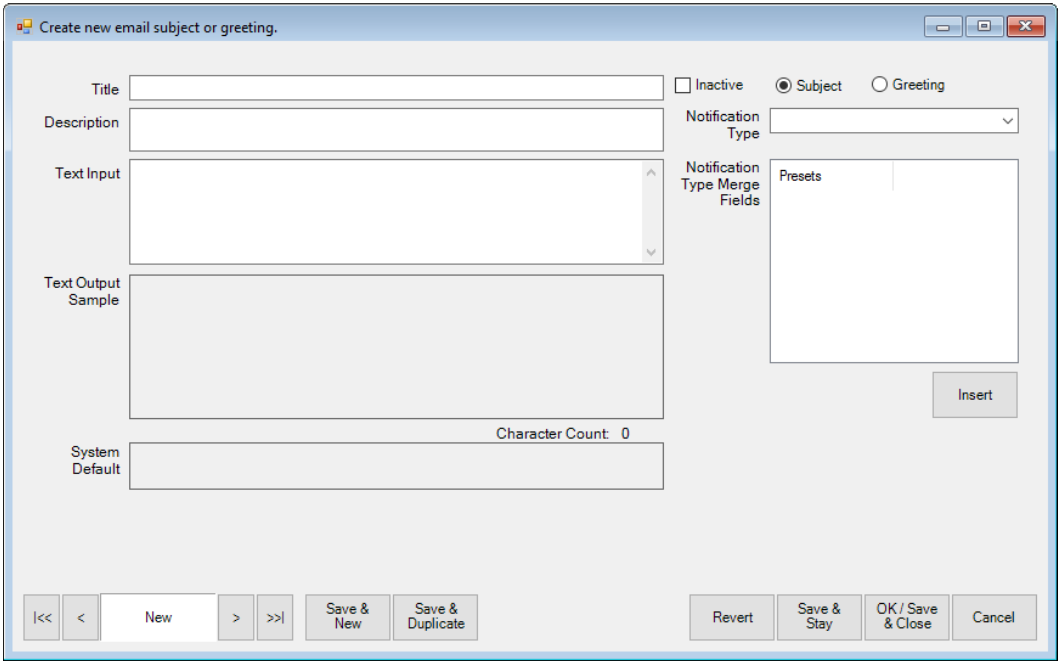
1. Select **Administrative ► Notifications ► Email Subjects and Greetings**. The **Email Subjects and Greetings** window will appear.



Name	Target	Description	Last Updated
Receipt Email Greeting	Receipt Subject	A greeting to go on each receipt email.	9/8/2016
Receipt Email Subject	Receipt Subject	Subject line for emailed receipts.	9/8/2016
Appraisal Ready Email Subject	Appraisal Done Subject	The default subject line for emails notifying customers of a completed appraisal.	9/8/2016
Appraisal Ready Email Greeting	Appraisal Done Greeting	The default greeting for emails notifying customers of a completed appraisal.	9/8/2016

☑ Show Inactive Items

2. Select **Add**. The **Create new email subject or greeting** window will appear.



☐ Inactive ● Subject ○ Greeting

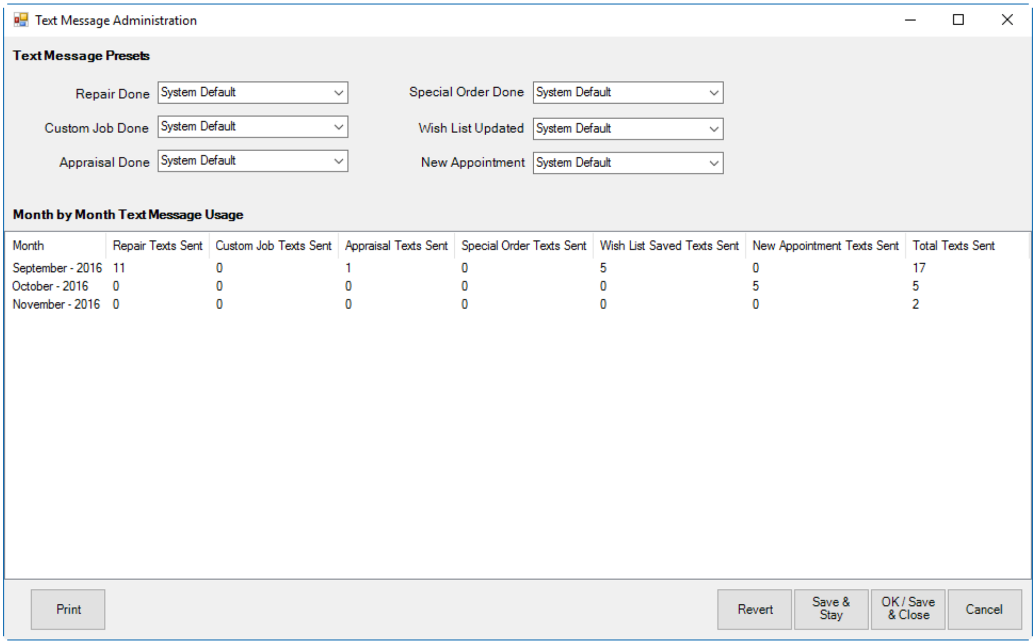
Character Count: 0

3. Enter a meaningful name of the subject or greeting in the **Title** field.
4. Enter a description of the subject or greeting in the **Description** field.
5. Enter the text for the subject or greeting in the **Text Input** field.
6. Select whether this is a subject or greeting.
7. On the right is a drop-down menu to select the **Message Type**. When you select a message type here, the available merge fields listed in the **Notification Type Merge Fields** will be populated with data fields appropriate for that notification.
8. Select merge fields from **Notification Type Merge Fields and select Insert**. The appropriate data for the transaction or customer will be dropped into the notification when it is sent.
9. Notice the system default is provided; this is what will be used if you don't create any messages.
10. Select **OK/Save and Close**. The subject or greeting will now be available in the **Email Administration** window.

13.11.6 Text Message Administration

To choose what messages to associate with types of notifications:

1. Select **Administrative ► Notifications ► Text Message Administration**. The **Text Message Administration** window will appear.



Text Message Presets

Repair Done: System Default
Custom Job Done: System Default
Appraisal Done: System Default
Special Order Done: System Default
Wish List Updated: System Default
New Appointment: System Default

Month by Month Text Message Usage

Month	Repair Texts Sent	Custom Job Texts Sent	Appraisal Texts Sent	Special Order Texts Sent	Wish List Saved Texts Sent	New Appointment Texts Sent	Total Texts Sent
September - 2016	11	0	1	0	5	0	17
October - 2016	0	0	0	0	0	5	5
November - 2016	0	0	0	0	0	0	2

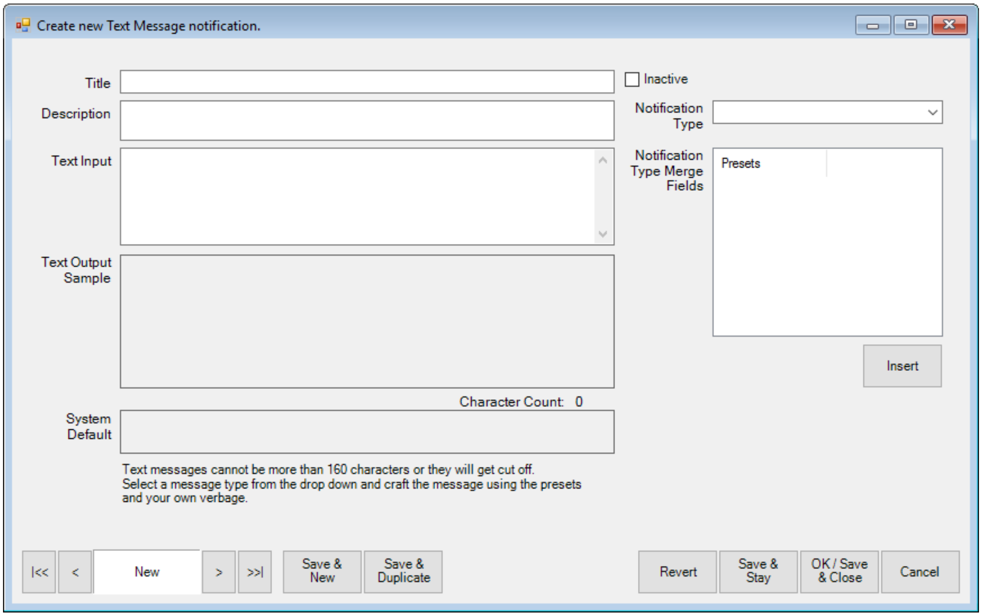
2. For each of **Repair Done**, **Custom Job Done**, **Appraisal Done**, **Special Order Done**, and New Appointment, select whether to use the system default message, or a pre-defined message.

To define messages, see the section entitled Text Messages.

13.11.7 Text Messages

To define text messages for use in the **Text Message Administration** window:

1. Select **Administrative ► Notifications ► Text Messages**. The **Create New Text Message Notification** window will appear.



Text messages cannot be more than 160 characters or they will get cut off.
Select a message type from the drop down and craft the message using the presets and your own verbage.

2. Enter a meaningful name of the message in the **Title** field.
3. Enter a description of the message in the **Description** field.
4. Enter the text for the message in the **Text Input** field.
5. Be sure to select what kind of notification with which this is to be associated from the **Notification Type** drop-down menu. This will populate the Notification Type Keywords with those appropriate to the notification type.
6. Use the **Insert** option to enter variable information such as your store name, the date, the envelope number, the number of jobs done, the number of repair jobs done, the number of jobs not done, etc.
7. Notice the system default is provided; this is what will be used if you don't define any messages.
8. Select **OK/Save and Close**. The subject or greeting will now be available in the **Email Administration** window.

13.11.8 Best Practices for Notifications

When setting up email or text message notifications, you'll want to consider what happens when a customer replies or tries to call the cell number. When setting up your email and text headers, footers, and default messages, you might consider indicating that the email or number is not monitored.

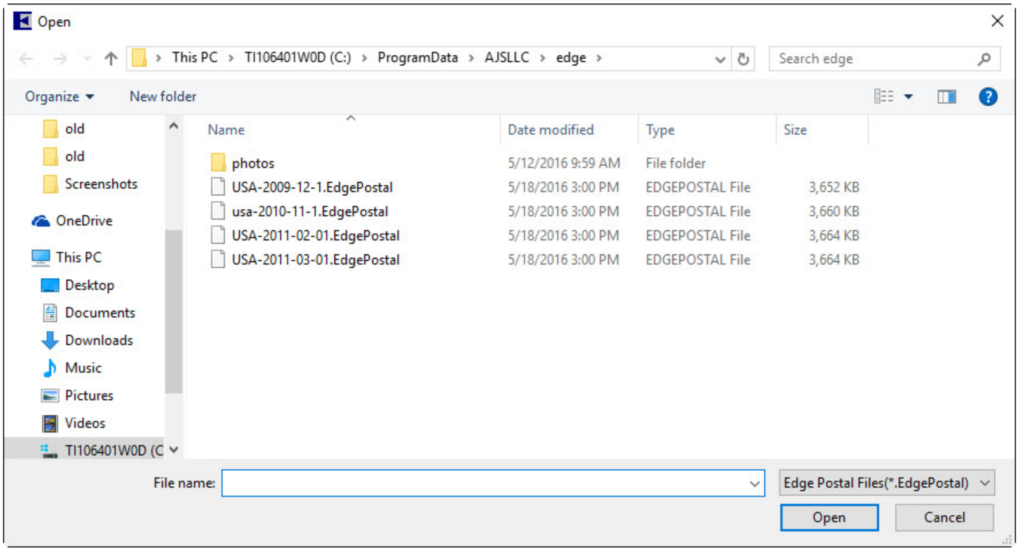
To find a job or appraisal by notification data, see the section entitled Service Job Notifications.

13.12 ZIP/Postal Codes

The Edge uses ZIP Codes in the USA and Postal Codes in Canada. The **ZIP/Postal Codes** function offers a way to update the ZIP/Postal Code database automatically at your convenience.

To update ZIP/Postal Codes:

1. First, download the zip code file from http://www.edgeuser.com. It can be found under **Downloads ► DataDownloads**. Use the **Save As** option when prompted by Windows. Be sure to make a note of where you save the file.
2. Select **Administrative ► ZIP/Postal Codes ► Import File**. You will be prompted to provide a file to import.

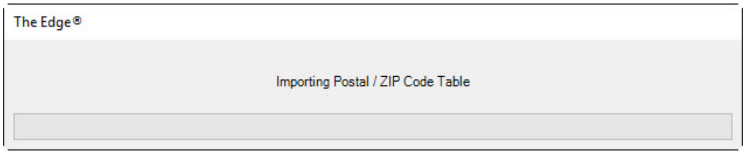


Name	Date modified	Type	Size
photos	5/12/2016 9:59 AM	File folder	
USA-2009-12-1.EdgePostal	5/18/2016 3:00 PM	EDGEPOSTAL File	3,652 KB
usa-2010-11-1.EdgePostal	5/18/2016 3:00 PM	EDGEPOSTAL File	3,660 KB
USA-2011-02-01.EdgePostal	5/18/2016 3:00 PM	EDGEPOSTAL File	3,664 KB
USA-2011-03-01.EdgePostal	5/18/2016 3:00 PM	EDGEPOSTAL File	3,664 KB

File name:

Edge Postal Files(*.EdgePostal)

3. Locate the file saved in step 1 and select **Open**. The **Import Status** will appear.



Importing Postal / ZIP Code Table

4. When the download is complete, a confirmation dialog will appear.

There are significantly more postal codes in Canada than ZIPS in the USA (855,000 vs 43,000). For this reason the Canadian Postal Code import will take a long time to complete, particularly if you are running an Access database. Consider performing this import procedure overnight.

To delete the ZIP/Postal Code file:

1. Select **Administrative** ► **ZIP/Postal Codes** ► **Delete All**.

Important! **Selecting OK will cause the ZIP/Postal Code file to be deleted without further confirmation.**

2. To proceed, complete the **Need Override** fields and select **OK**. The ZIP Code file will be deleted.

13.13 Task Automation Rules

Task Automation Rules give you the ability to create rules that will automatically generate tasks when trigger conditions are met. This allows you to create task workflows.

Many triggers include filters that let you specify additional criteria. For instance, the **Inventory Sold** trigger includes an item filter that allows you to set specific item parameters.

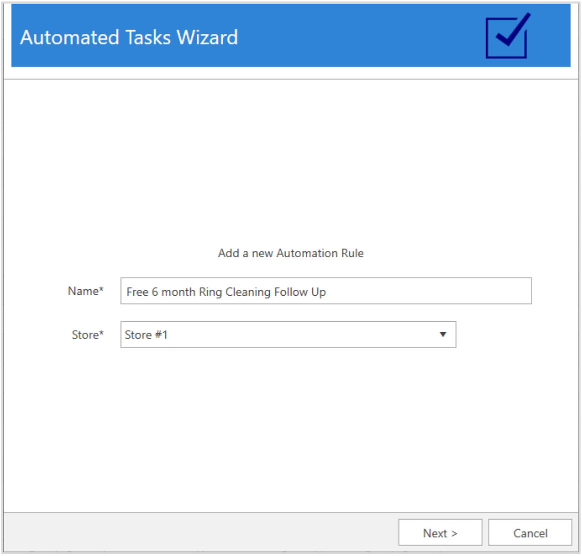
Important!

Task Automation Rules are not compatible with Microsoft Access databases. You must be running a SQL database.

13.13.1 Create Rule

To create a rule:

1. Click **Administrative > Tasks > Automation Rules**. The **Automation Task Rules** list will appear.
2. At the bottom, click **Add Rule**. This will open the **Automated Tasks Wizard**.
3. Enter a **Name** for this rule and click **Next**. Note if you are a multi-store user you will also need to choose a **Store**.

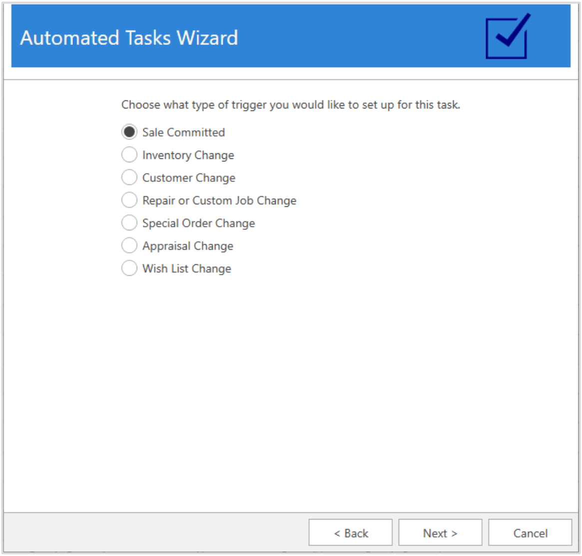


Add a new Automation Rule

Name* Free 6 month Ring Cleaning Follow Up

Store* Store #1

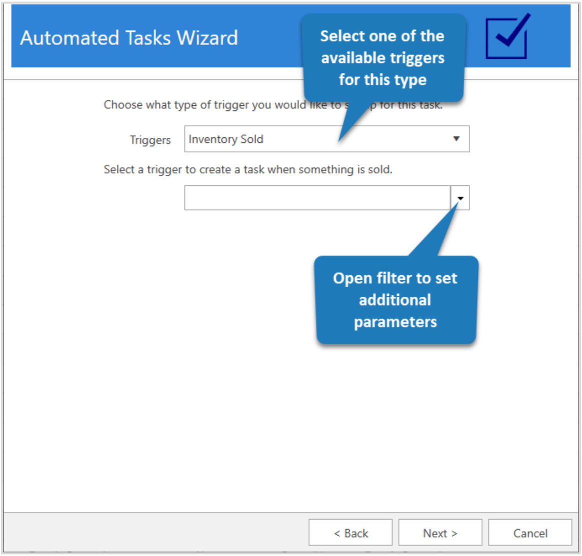
4. Choose the type of trigger and click **Next**.



Choose what type of trigger you would like to set up for this task.

● Sale Committed
○ Inventory Change
○ Customer Change
○ Repair or Custom Job Change
○ Special Order Change
○ Appraisal Change
○ Wish List Change

5. Click the **Triggers** drop-down to see available triggers for this type. After selecting a trigger, use the drop-down below it to open the filter. The filter will vary depending on the type of trigger, e.g. **Inventory Sold** will include an item filter that lets you specify inventory criteria.



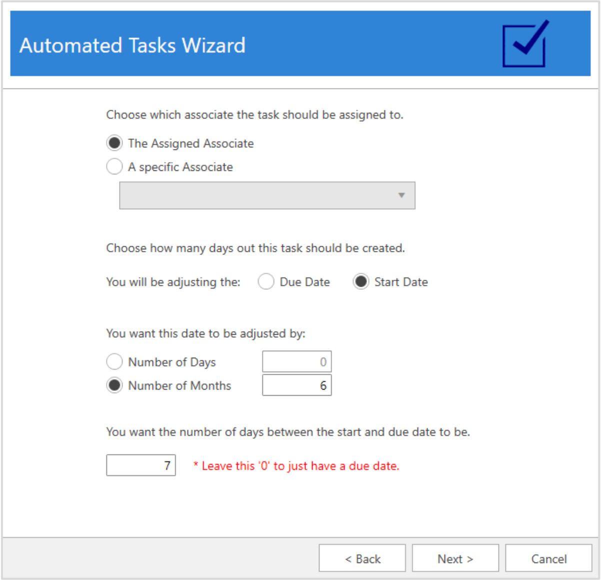
Choose what type of trigger you would like to set up for this task.

Triggers: Inventory Sold

Select a trigger to create a task when something is sold.

6. After defining criteria, click **OK** to save the filter and then click **Next**.

7. At the top of this window, choose the associate for this task.



Choose which associate the task should be assigned to.

● The Assigned Associate
○ A specific Associate

Choose how many days out this task should be created.

You will be adjusting the: ○ Due Date ● Start Date

You want this date to be adjusted by:

○ Number of Days 0
● Number of Months 6

You want the number of days between the start and due date to be.

7 * Leave this '0' to just have a due date.

Assigned Associate will use the associate that triggered the rule. For example, if this is an **Inventory Sold** rule, **Assigned Associate** would be the person who rang out the transaction. Use **Specific Associate** if you always want to assign the task to the same person

8. Use the bottom half of this window to specify whether you want this task to use a **Due Date** or **Start Date**, then choose how many days or months out you want that date to be. If using a **Start Date**, use the bottom field to specify how many days between **Start** and **Due Date**. Click **Next** when done.

9. Finally, enter the task details and **Finish** adding the rule.

13.13.2 Edit a Rule

Existing rules can be edited at any time. Note that this will not update any tasks that were already generated by this rule.
To edit a rule:

1. Click **Administrative > Tasks > Automation Rules**. The **Automation Task Rules** list will appear.
2. Select the rule you want to edit and click **Edit Rule**. Alternatively, you can double click on the rule.
3. Step through the wizard by clicking **Next** and make any desired changes.
4. Complete the wizard by clicking **Finish** at the end.

13.13.3 Delete a Rule

Rules are never truly deleted. Instead, they get marked inactive and will not show in your list unless you check **Show Deleted** at the bottom. Note that deleting a rule will not delete any tasks that it already generated.
To delete a rule:

1. Click **Administrative > Tasks > Automation Rules**. The **Automation Task Rules** list will appear.
2. Select the rule you want to delete and click **Delete Rule**.
3. You will see the rule turns red and the **Is Active** column will change to **No**.

13.13.4 Un-Delete a Rule

To un-delete a rule:

1. Click **Administrative > Tasks > Automation Rules**. The **Automation Task Rules** list will appear.
2. Check the **Show Deleted** box at the bottom.
3. Double click or edit the rule you wish to make active again.
4. Click **Next** all the way until the wizard completes. Once you click **Finish** the rule will be active again.

13.13.5 Examples

Thank you on new purchases

Rule	New purchase – thank you		
Trigger Type	Sale Committed		
Trigger	Inventory Sold		
Filter	Item Filter	**General tab** Defaults (all blank)	**Type & Status tab** Pricing Methods: Item Pricing Inventory Type: Inventory
Task Associate	The Assigned Associate		
Date Adjustment	7 days		
Task Details	Thank you follow up on new purchase		

Notify customer repair ready

Rule	Repair ready – notify customer

Trigger Type	Repair or Custom Job Change		
Trigger	Repair Marked Done		
Filter	Job Filter	**General tab** Job Type: Repair	**Status/Dates tab** Defaults (all dates)
Task Associate	The Assigned Associate		
Date Adjustment	0 days		
Task Details	Repair ready – notify customer		

Engagement ring 6 month inspection/cleaning follow up

Rule	Engagement Ring – 6 month inspection/cleaning		
Trigger Type	Sale Committed		
Trigger	Inventory Sold		
Filter	Item Filter	**General tab** Category: 100	**Type & Status tab** Inventory Type: Inventory
Task Associate	The Assigned Associate		
Date Adjustment	6 months		
Task Details	6 month engagement ring follow up – offer inspection/cleaning		

New customer referred, thank referrer

Rule	New customer referral – thank referrer		
Trigger Type	Customer Change		
Trigger	Customer Created		
Filter	Customer Filter	**Rewards/Referral tab** Has Been Referred	**All Other Tabs** Defaults
Task Associate	The Assigned Associate		
Date Adjustment	0 days		
Task Details	New customer referral – thank referrer		

New repair needs to be completed

Rule	New repair needs to be completed		
Trigger Type	Repair or Custom Job Change		
Trigger	Repair Created		
Filter	Job Filter	**General tab** Job Type: Repair	**Status/Dates tab** Defaults (all dates)
Task Associate	Specific associate: your jeweler		
Date Adjustment	0 days		
Task Details	New repair needs to be completed		

Care plan annual follow up

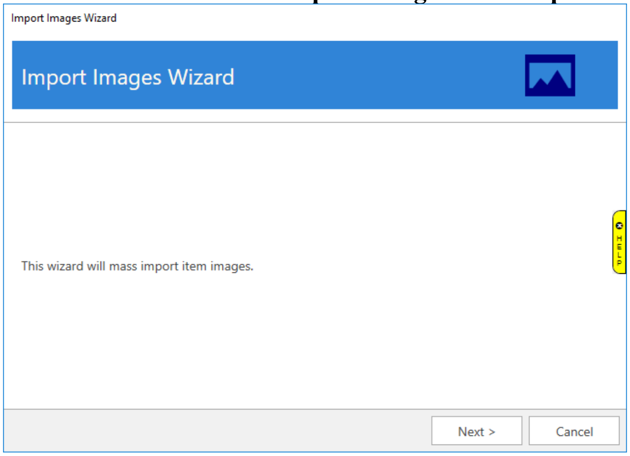
Rule	Care plan sold – annual follow up		
Trigger Type	Sale Committed		
Trigger	Care Plan Sold		
Filter	Item Filter	**General tab** Defaults (all blank)	**Type & Status tab** Defaults
Task Associate	The Assigned Associate		
Date Adjustment	12 months		
Task Details	Care plan sold – annual follow up		

13.14 Import Images

The **Import Images** wizard allows you to mass import images from a vendor. These images are then matched to your inventory based on the style number. Note that this only works if the images are named after the vendor's style number.

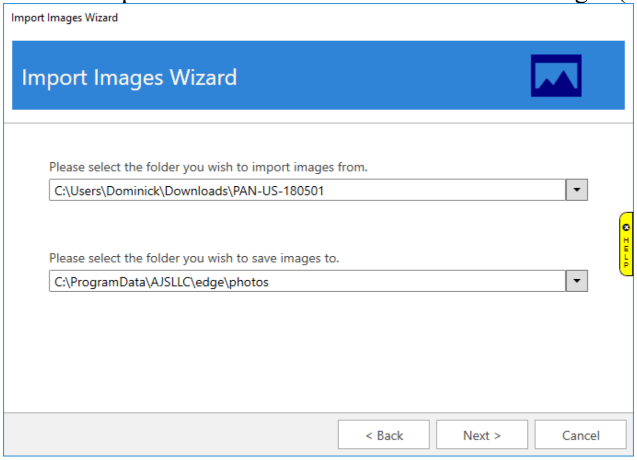
To use this wizard:

1. Click **Administrative ► Import Images**. The **Import Images Wizard** will appear.



This wizard will mass import item images.

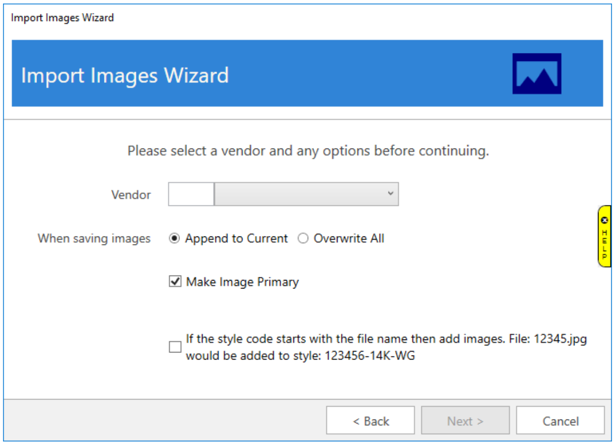
2. Click **Next**. Use the top drop-down to select the folder containing your vendor images. Use the bottom drop-down to select the folder to save the images (this defaults to your Edge photos folder).



Please select the folder you wish to import images from.
C:\Users\Dominick\Downloads\PAN-US-180501

Please select the folder you wish to save images to.
C:\ProgramData\AJSLLC\edge\photos

3. Click **Next**.



Import Images Wizard

Please select a vendor and any options before continuing.

Vendor

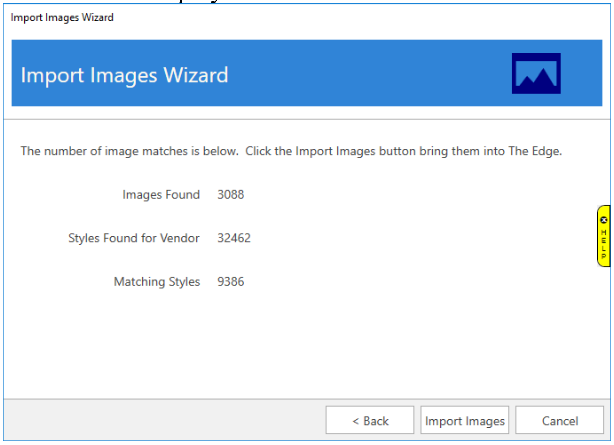
When saving images ● Append to Current ○ Overwrite All

☑ Make Image Primary

☐ If the style code starts with the file name then add images. File: 12345.jpg would be added to style: 123456-14K-WG

Vendor	Use this drop-down to select the vendor for these images.
When savings images	**Append to Current** will add new images and keep any existing. **Overwrite All** will remove existing images and add new (images are removed from Edge, but not deleted from your computer).
Make Image Primary	When appending, check this to make the newly imported image the primary.
If the style code starts with the file name then add images	Check this to match images of the beginning of the file name matches the beginning of the vendor style (e.g. file 12345.jpg would match to style 123456-14K-WG).

4. Specify your criteria and click **Next**. The software will compare the images to the items in your database and display the number of matches found.



Import Images Wizard

The number of image matches is below. Click the Import Images button bring them into The Edge.

Images Found 3088

Styles Found for Vendor 32462

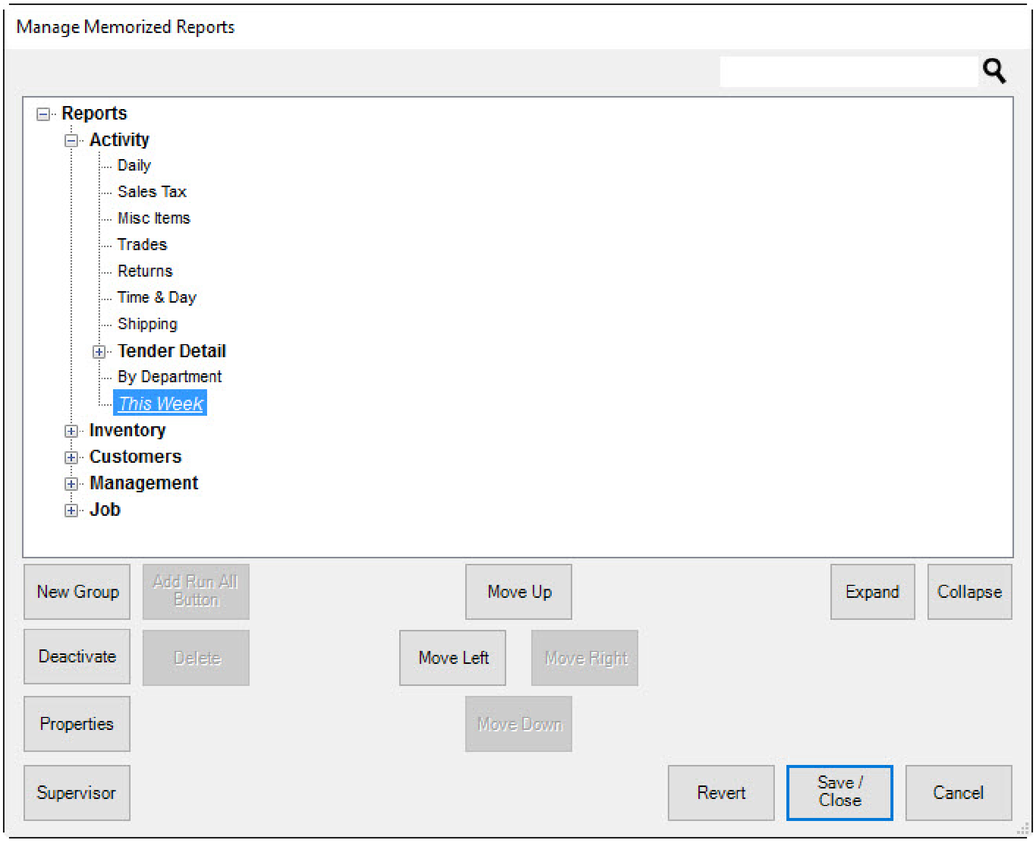
Matching Styles 9386

5. Use the **Import Images** button to import the matching styles. Depending on the number of images this may take a few minutes to complete.

13.15 Manage Reports Menu

Memorized reports appear in the **Reports** window navigation bar. By default, reports will be saved at the bottom of the **Reports** menu for that report section. For example, if you created a report based on any of the **Activity** reports, your memorized report will be saved at the bottom of the **Activity** reports list. To change how those items appear and manage other settings:

1. Select **Administrative ► Manage Reports Menu**. The **Manage Memorized Reports** window will appear.

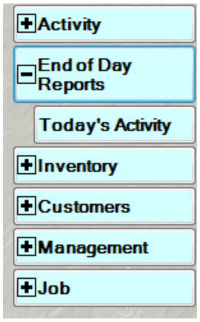


The hierarchy of reports shown will mirror what is shown in the main **Reports** window. Also notice that the reports you created are in italics. What you arrange here is what will appear in the **Reports** window. Options in the **Manage Memorized Reports** window include:

Expand	Expands the hierarchy to show the whole list of reports.
Collapse	Collapses the hierarchy to show only the top-level list.
New Group	Allows you to create a new category of reports.

Add Run All Button	Allows you to add a button to the **Reports** menu to run all reports in that section. Important! **The Run All feature may constitute a lot of reporting and will consume system resources for some time.**
Deactivate/Activate	Allows you to mark the report inactive or active according to whether you want it to appear in the **Reports** window. If you select **Deactivate**, it will be saved, so you can mark it active at a later time.
Delete	Deletes the report. A backup file will be saved; this can be used to reactivate the report using **Import** option described below.
Properties	Shows the settings for the button, but does not permit editing of the report filter.
Supervisor	Provides options such as: • **Import Memorized Report**: Allows you to import memorized reports exported by The Edge or other stores. This also allows you to recover a deleted report. • **Export Memorized Report**: Allows you to export memorized reports for use in sharing with other stores. • **Reset to Program Defaults**: Returns the Report menu to those initially provided with The Edge.
Move Up/Move Down/Move Left/Move Right	Allows you to move the memorized report button relative to others in the hierarchy. For example, to place a button in the **Activity** report section, move it up to the **Activity** section, select **Move Right** or **Move Left** to position it under a different level.
Revert	Reverts the hierarchy to the state it was in since the last save.
Save/Close	Saves the changes made to hierarchy and closes the window.
Cancel	Closes the window without saving changes.

2. Make changes to the structure as desired and select **Save/Close**. The **Report** will reflect that structure.



To erase memorized reports and go back to the pre-packaged reports, select Administrative ► Manage Reports Menu ► Supervisor ► Reset Reports to System Defaults.

13.15.1 Creating Groups of Reports

To create a group of reports to run regularly:

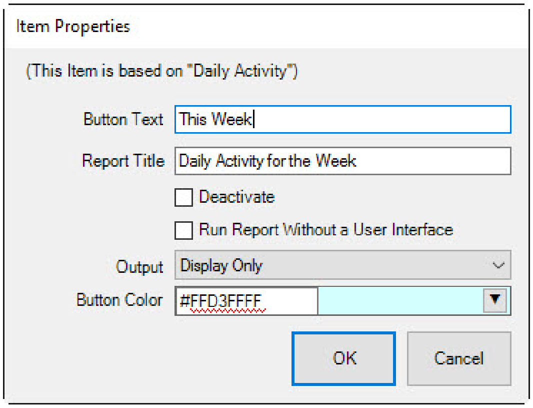
1. Create reports to be run in the group. For each one, decide whether they should run without further filtering using the **Run Report without a User Interface** option.
2. Using the **Administrative** ► **Manage Reports Menu**, select **Create Group**.
3. Name the group as desired.
4. Using the **Move Up**/**Move Down**/**Move Right**/**Move Left** buttons, move the group to the desired location in the hierarchy, then move the newly memorized reports under the group.
5. Optionally, add a **Run All** button under the group.

The Run All command will apply to the group under which it is located. If it is at the top of the hierarchy, it will run ALL!

13.15.2 Changing Report Button Properties

To change memorized report button properties (not report filters):

1. Using the **Administrative** ► **Manage Reports Menu**, select the report and select **Properties**.



(This Item is based on "Daily Activity")

Button Text: This Week

Report Title: Daily Activity for the Week

☐ Deactivate

☐ Run Report Without a User Interface

Output: Display Only

Button Color: #FFD3FFFF

2. Make changes as needed and select **OK**.

13.16 Care Plan Administration

The Edge has integrated jewelry care programs for you to offer your customers at point of sale. The true beauty of these programs is that there is no up-front cost to you.

13.16.1 Program Coverage

Programs are offered by type of merchandise: jewelry and watches. These vary by provider, however. See your contract with your provider for details. Note that The Edge offers associated plans based on the item's category. See the section entitled Care Plan Category Options. For more about working with categories, see the section in The Edge User Guide entitled Categories (http://docs.edgeuser.com/NetHelp/Documents/categories.htm).

13.16.2 Licensing

Here's how to get started:

1. Contact The Edge Customer Service team at service@ajsllc.com.
2. You'll be referred to a care plan provider who can license you for one of The Edge's care plans.
3. Your Edge license will be updated to show your enrollment and the programs you wish to offer your customers. Care plans are tied to the store license, but there is a flag at the account level.
4. After you have set up your account with the care plan partner, The Edge Customer Service team will update your license and send it to you. Install your license and reboot The Edge.

It is through the license information that your care plan provider will bill you for the cost of the plans.

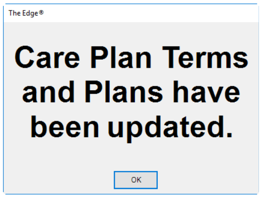
13.16.2.1 Partner Contact Information

Your care plan provider will provide you with access to a portal where you can view activity and make claims for repair reimbursement.

13.16.3 Setting Care Plan Updates – Initial Setup

Some providers offer terms to be kept in your system. To download pricing rows and terms as well as care plan repair SKUs, use the **Care Plan Updates** feature. This is usually only needed when you first start with a care plan. To do so:

1. Go to **Administrative** ► **Care Plan Administration** ► **Care Plan Check for Updates**.
2. The Edge will contact your care plan provider and update your plan files.



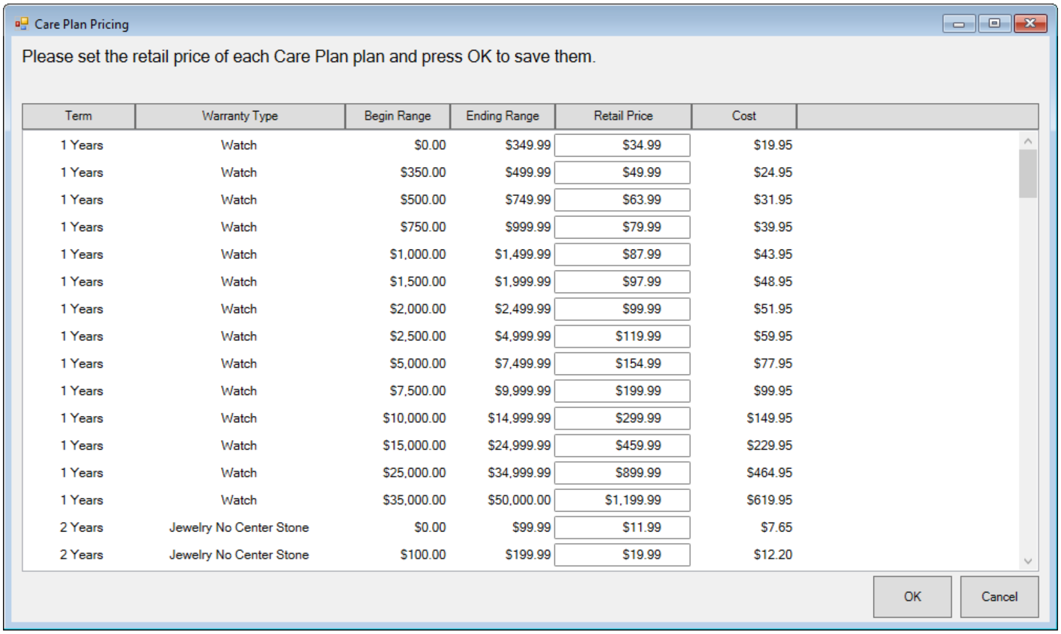
Care Plan Terms and Plans have been updated.

3. You're up to date.

13.16.4 Care Plan Pricing Customization

Once you have the plans and initial pricing downloaded, you can edit them to suit your needs. To do so:

1. Go to **Administrative ▶ Care Plan Administration ▶ Care Plan Pricing**. The **Care Plan Pricing** window will appear.



Please set the retail price of each Care Plan plan and press OK to save them.

Term	Warranty Type	Begin Range	Ending Range	Retail Price	Cost
1 Years	Watch	$0.00	$349.99	$34.99	$19.95
1 Years	Watch	$350.00	$499.99	$49.99	$24.95
1 Years	Watch	$500.00	$749.99	$63.99	$31.95
1 Years	Watch	$750.00	$999.99	$79.99	$39.95
1 Years	Watch	$1,000.00	$1,499.99	$87.99	$43.95
1 Years	Watch	$1,500.00	$1,999.99	$97.99	$48.95
1 Years	Watch	$2,000.00	$2,499.99	$99.99	$51.95
1 Years	Watch	$2,500.00	$4,999.99	$119.99	$59.95
1 Years	Watch	$5,000.00	$7,499.99	$154.99	$77.95
1 Years	Watch	$7,500.00	$9,999.99	$199.99	$99.95
1 Years	Watch	$10,000.00	$14,999.99	$299.99	$149.95
1 Years	Watch	$15,000.00	$24,999.99	$459.99	$229.95
1 Years	Watch	$25,000.00	$34,999.99	$899.99	$464.95
1 Years	Watch	$35,000.00	$50,000.00	$1,199.99	$619.95
2 Years	Jewelry No Center Stone	$0.00	$99.99	$11.99	$7.65
2 Years	Jewelry No Center Stone	$100.00	$199.99	$19.99	$12.20

Fields and option in the **Care Plan Pricing** window include:

Term	The length of coverage on the plan.

Warranty Type	The category of coverage. Options include:
	`Watch`
	`Jewelry No Center Stone`
	`Jewelry with Center Stone`

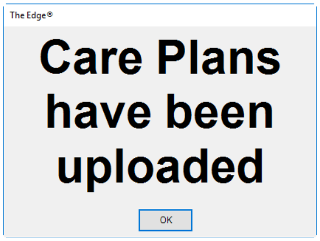
Begin Range	The lower end of the item retail price range within this plan.
Ending Range	The upper end of the item retail price range within this plan.
Retail Price	The suggested amount you should charge for the plan.
Cost	The cost to you from your care plan provider for the coverage. Keep this in mind if you change the pricing; you'll want to make sure you cover this cost.

2. If desired, edit the **Retail Price** of each plan.
3. Select **OK**. The prices will be saved.

13.16.5 Uploading Care Plan Transactions

Transactions are collected in The Edge and then sent to you care plan provider on a daily basis. If you must perform a manual upload:

1. Go to **Administrative** ► **Care Plan Administration** ► **Care Plan Upload Data**.
2. The transactions will be uploaded and recorded by your care plan provider.



Care Plans have been uploaded

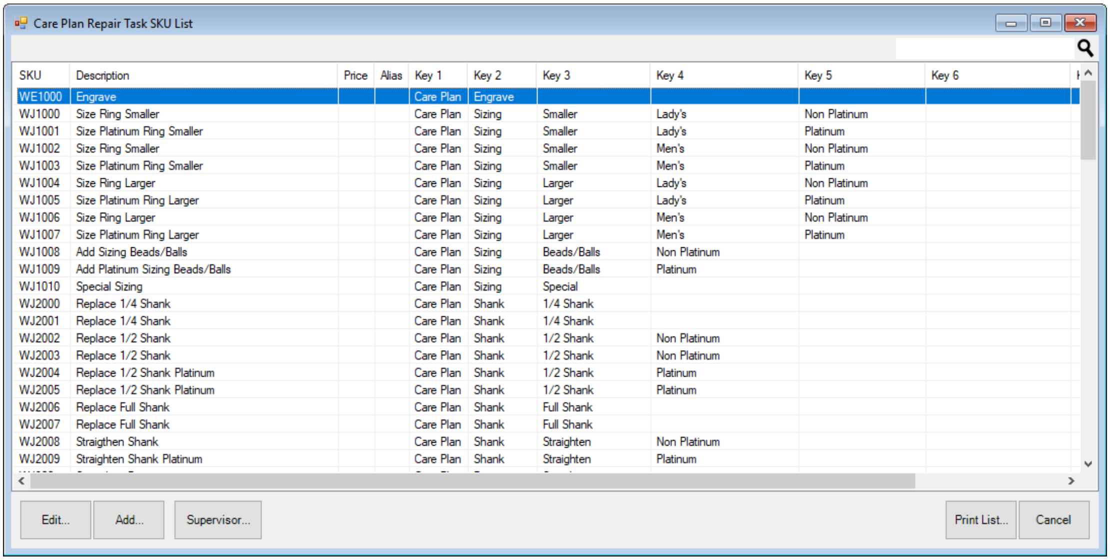
This data may take up to 48 hours to show up on your care plan provider's records and be reflected in bills.

13.16.6 Printing Care Plan Terms

Some providers offer plan terms to be kept in your system. When you update your license, terms are stored as PDF files in your shared data folder, for example, `C:\ProgramData\AJSLLC\edge\CarePlanTerms`. Open them and print as needed.

13.17 Care Plan Repair SKUs

Care plan repair SKUs will be downloaded into The Edge when you do Care Plan Update. See the section entitled Getting Care Plan Updates. These will be needed to ensure repairs done on covered items are uploaded to your care plan provider correctly. After that, to see the list of SKUs for care plan repairs, go to **Administrative ► Care Plan Administration ► Repair SKUs**.

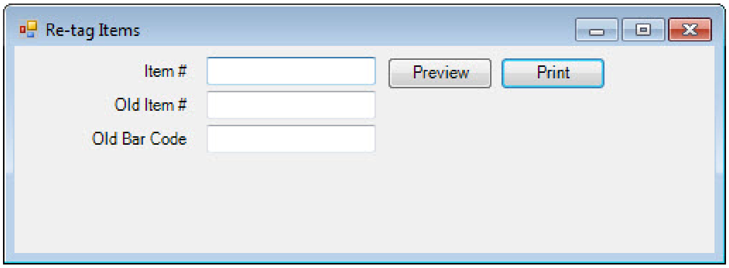


SKU	Description	Price	Alias	Key 1	Key 2	Key 3	Key 4	Key 5	Key 6
WE1000	Engrave			Care Plan	Engrave				
WJ1000	Size Ring Smaller			Care Plan	Sizing	Smaller	Lady's	Non Platinum	
WJ1001	Size Platinum Ring Smaller			Care Plan	Sizing	Smaller	Lady's	Platinum	
WJ1002	Size Ring Smaller			Care Plan	Sizing	Smaller	Men's	Non Platinum	
WJ1003	Size Platinum Ring Smaller			Care Plan	Sizing	Smaller	Men's	Platinum	
WJ1004	Size Ring Larger			Care Plan	Sizing	Larger	Lady's	Non Platinum	
WJ1005	Size Platinum Ring Larger			Care Plan	Sizing	Larger	Lady's	Platinum	
WJ1006	Size Ring Larger			Care Plan	Sizing	Larger	Men's	Non Platinum	
WJ1007	Size Platinum Ring Larger			Care Plan	Sizing	Larger	Men's	Platinum	
WJ1008	Add Sizing Beads/Balls			Care Plan	Sizing	Beads/Balls	Non Platinum		
WJ1009	Add Platinum Sizing Beads/Balls			Care Plan	Sizing	Beads/Balls	Platinum		
WJ1010	Special Sizing			Care Plan	Sizing	Special			
WJ2000	Replace 1/4 Shank			Care Plan	Shank	1/4 Shank			
WJ2001	Replace 1/4 Shank			Care Plan	Shank	1/4 Shank			
WJ2002	Replace 1/2 Shank			Care Plan	Shank	1/2 Shank	Non Platinum		
WJ2003	Replace 1/2 Shank			Care Plan	Shank	1/2 Shank	Non Platinum		
WJ2004	Replace 1/2 Shank Platinum			Care Plan	Shank	1/2 Shank	Platinum		
WJ2005	Replace 1/2 Shank Platinum			Care Plan	Shank	1/2 Shank	Platinum		
WJ2006	Replace Full Shank			Care Plan	Shank	Full Shank			
WJ2007	Replace Full Shank			Care Plan	Shank	Full Shank			
WJ2008	Straigthen Shank			Care Plan	Shank	Straighten	Non Platinum		
WJ2009	Straighten Shank Platinum			Care Plan	Shank	Straighten	Platinum		

13.18 Retagging Items

If an item requires a new tag, either because of an item ID change or data conversion, use the **Retag** function. To retag an item:

1. Select **Administrative ► Retag**. The **Re-tag Items** window will appear.



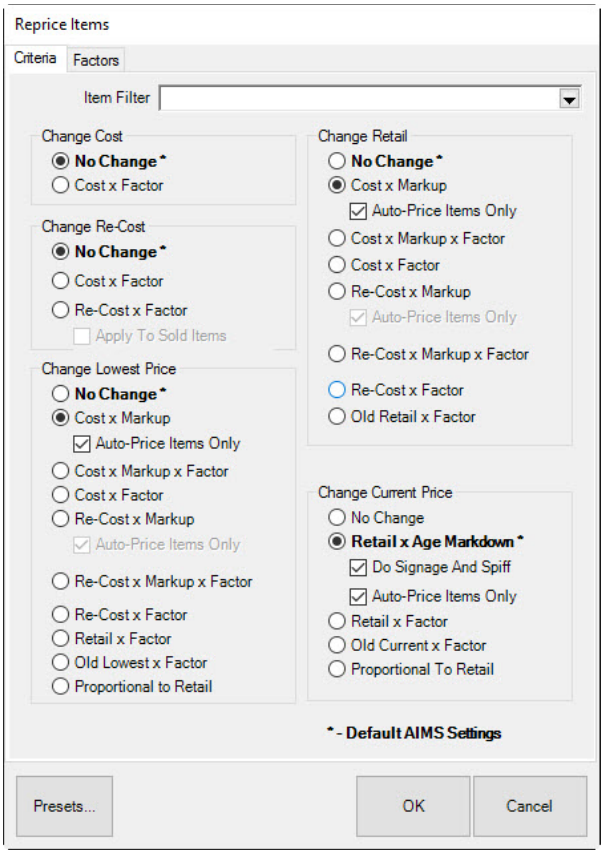
2. Select the field in which to enter the appropriate type of item number.
3. Enter the new item number or scan the old tag.
4. To see the tag before you print it, select **Preview**.
5. Select **Print**.

If you wish to convert a number or all of your tags to a new format, contact The Edge Support Team for assistance.

13.19 Reprice Items

The **Reprice Items** section allows you to reprice a selection of items based on specific criteria. It is very flexible in its use and selection criteria, and also generates a pricing preview. This preview is useful in examining price changes before committing to them. To reprice an item:

1. Select **Administrative ► Reprice.** The **Reprice Items** window will appear.



Change Cost
● **No Change***
○ Cost x Factor

Change Re-Cost
● **No Change***
○ Cost x Factor
○ Re-Cost x Factor
☐ Apply To Sold Items

Change Lowest Price
○ **No Change***
● Cost x Markup
☑ Auto-Price Items Only
○ Cost x Markup x Factor
○ Cost x Factor
○ Re-Cost x Markup
☑ Auto-Price Items Only
○ Re-Cost x Markup x Factor
○ Re-Cost x Factor
○ Retail x Factor
○ Old Lowest x Factor
○ Proportional to Retail

Change Retail
○ **No Change***
● Cost x Markup
☑ Auto-Price Items Only
○ Cost x Markup x Factor
○ Cost x Factor
○ Re-Cost x Markup
☑ Auto-Price Items Only
○ Re-Cost x Markup x Factor
○ Re-Cost x Factor
○ Old Retail x Factor

Change Current Price
○ No Change
● **Retail x Age Markdown***
☑ Do Signage And Spiff
☑ Auto-Price Items Only
○ Retail x Factor
○ Old Current x Factor
○ Proportional To Retail

*** - Default AIMS Settings**

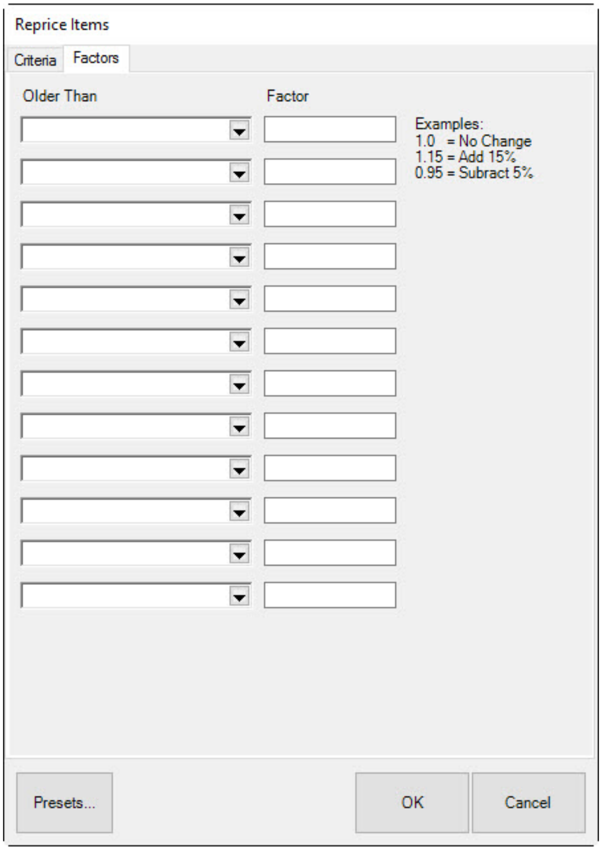
The repricing function includes two tabs: **Criteria** and F**actors**. Options in the **Criteria** tab include:

Item Filter	**Presents a standard item filter to aid in narrowing down include inventory.**
Change Cost	**No change** – Cost is not changed. **Cost x Factor –** Multiplies cost by the factor specified on the factors tab.

Change Re-Cost	For more about re-costing, see the section entitled Re-Costing Multiple Items. **No change – Re-cost** is not changed. **Cost x Factor –** Recalculates re-cost by the multiplying cost by the factor specified on the **Factors** tab. **Re-Cost x Factor –** Recalculates re-cost by multiplying re-cost by the factor specified on the **Factors** tab. **Apply to sold Items –** Indicates that sold items should be included in the re-costing.
Change Retail	**No change** – Retail is not changed. **Cost x Markup** - Recalculates retail price based on the cost multiplied by the markup defined on the category **Pricing** tab. **Auto-Reprice Items Only** – Indicates that only items that have the **Auto** option enabled should be affected. **Cost x Markup x Factor** – Recalculates retail price based on the cost multiplied by the markup multiplied by an additional factor specified on the **Factors** tab. **Cost x Factor** – Recalculates retail price based on the cost multiplied by a factor specified on the **Factors** tab. **Re-Cost x Markup –** Recalculates retail price based on the item re-cost multiplied by the markup defined on the category **Pricing** tab. **Auto Price Items Only –** Indicates that only items that have the **Auto** option enabled should be affected. **Re-cost x Markup x Factor –** Recalculates retail price based on the re-cost multiplied by the markup multiplied by an additional factor specified on the **Factors** tab. **Re-cost x Factor** – Recalculates retail price based on the re-cost multiplied by a factor specified on the **Factors** tab. **OldRetail x Factor** – Recalculates retail price based on the old retail price multiplied by a factor specified on the **Factors** tab
Change Lowest Price	**No change** –Lowest price is not changed **Cost x Markup** - Recalculates lowest price based on the cost multiplied by the minimum markup defined on the category **Pricing** tab **Auto Price Items Only –** Indicates that only items that have the **Auto** option enabled should be affected. **Cost x Markup x Factor** – Recalculates lowest price based on the cost multiplied by the markup multiplied by an additional factor specified on the **Factors** tab. **Cost x Factor** – Recalculates lowest price based on the cost multiplied by a factor specified on the **Factors** tab. **Re-Cost x Markup** – Recalculates lowest price based on the re-cost multiplied by the minimum markup defined on the category **Pricing** tab **Auto Price Items Only –** Indicates that only items that have the **Auto** option enabled should be affected.

	Re-Cost x Markup x Factor – Recalculates lowest price based on the re-cost multiplied by the markup multiplied by an additional factor specified on the **Factors** tab. **Re-Cost x Factor** – Recalculates lowest price based on the re-cost multiplied by a factor specified on the **Factors** tab. **Retail x Factor** – Recalculates lowest price based on the retail price multiplied by a factor specified on the **Factors** tab **OldLowest x Factor** – Recalculates lowest price based on the old lowest price multiplied by a factor specified on the **Factors** tab **Proportional to Retail** – Recalculates lowest price in such a way as to keep it proportionally equal to a new retail.
Change Current Price	**No Change** – Current price is not changed. **Retail x Age Markdown** – Calculates current price based on the retail price multiplied by the markdown defined on the category **Pricing** tab. **Retail x Factor** – Recalculates current price based on the retail price multiplied by a factor specified on the **Factors** tab. **OldCurrent x Factor** – Recalculates current price based on the old current price multiplied by a factor specified on the **Factors** tab. **Proportional to Retail** – Recalculates current price in such a way as to keep it proportionally equal to a new retail.

2. Select the **Factors** tab.



Examples:
1.0 = No Change
1.15 = Add 15%
0.95 = Subract 5%

Options in the **Factors** tab include:

Older Than	Allows you to specify inventory age.
Factor	Specifies a multiplier to use for repricing and re-costing inventory. It only works in conjunction with repricing and re-costing options that utilize a factor.

3. Specify your criteria by using the radio buttons to select what price change is to occur. Additionally, use the item filter to define which items this repricing will apply to.
4. Use the **Factors** tab, if necessary, to include a factor and an age range to apply that factor to.
5. Select **OK** to run the repricing. You will be presented with a list of items matching your repricing criteria. This list will show the old pricing information as well as the new pricing information for you to review. If it is satisfactory, select **OK** to finalize these price changes.

Be sure to review the changes carefully. Repricing cannot be undone.

13.19.1 Re-Costing Multiple Items

The **Re-Cost Item** feature allows you to change the replacement cost of an inventory item without affecting the actual cost paid. This way, a retailer can consider what the cost of an inventory item would be if they purchased it again. Some reports have been optimized so you can choose to print either cost or re-cost. A retailer can recalculate certain business decisions based on a new value of the inventory, e.g., commissions or inventory stock reports.

To re-cost items, do so from the **Administrative** menu:

1. Select **Administrative** ► **Reprice.** The **Reprice Items** window will appear with the **Criteria** tab open.
2. From the **Criteria** tab, use the **Item** filter identify the items to re-cost. This could include narrowing to items that have been re-costed previously or not at all.
3. From the **Change Re-Cost** area, select **Re-Cost x Factor**, which recalculates the cost by multiplying the original cost for a factor to be specified on the **Factors** tab.
4. Select the **Factors** tab. Options for specifying cost ranges will appear.
   The left column allows you to select a date for items older than which to re-cost. The right column allows you to enter an amount by which to change the cost.
   For example, if you select a date 30 days in the past from **Older Than** and then enter 1.2 under **Factor**, items older than 30 days will have a cost increased by 20 percent. That is, The Edge will multiply the existing cost by the current amount plus/minus the change.
5. Select **OK**. You will be presented with a list of all items matching the criteria. This list will show the old information as well as the new information for you to review. If it is satisfactory, select **Check All** to finalize these changes. Alternatively, select those which you wish to change.

Important!

Be sure to review the changes carefully. Recosting cannot be undone. As a backup, it may be prudent to use Print List for future reference.

Note!

- **When dealing with bulk items, the re-cost is associated with the master SKU record by default.**
- **When running the Commission report, look for the field Calculate Commission, which allows you to use this amount to determine commission, as opposed to cost or sale line.**
- **This has no bearing on your QuickBooks accounts or financial records.**

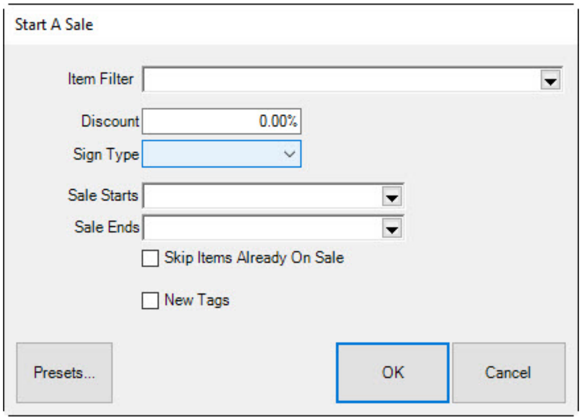
Tip!

A specific Re-Cost report is available to show cost and re-cost along with the difference.
The inventory item find function now offers re-cost-related filters as well. A number of inventory-related reports allow you to choose between inventory cost vs. inventory re-cost.

13.20 Start a Sale

The Edge makes it easy to categorically reduce the price of items for a special event. This feature can be used for fine-item pricing and bulk UPC item pricing. To start a sale:

1. Select **Administrative ► Start a Sale**. The **Start a Sale** window will appear.

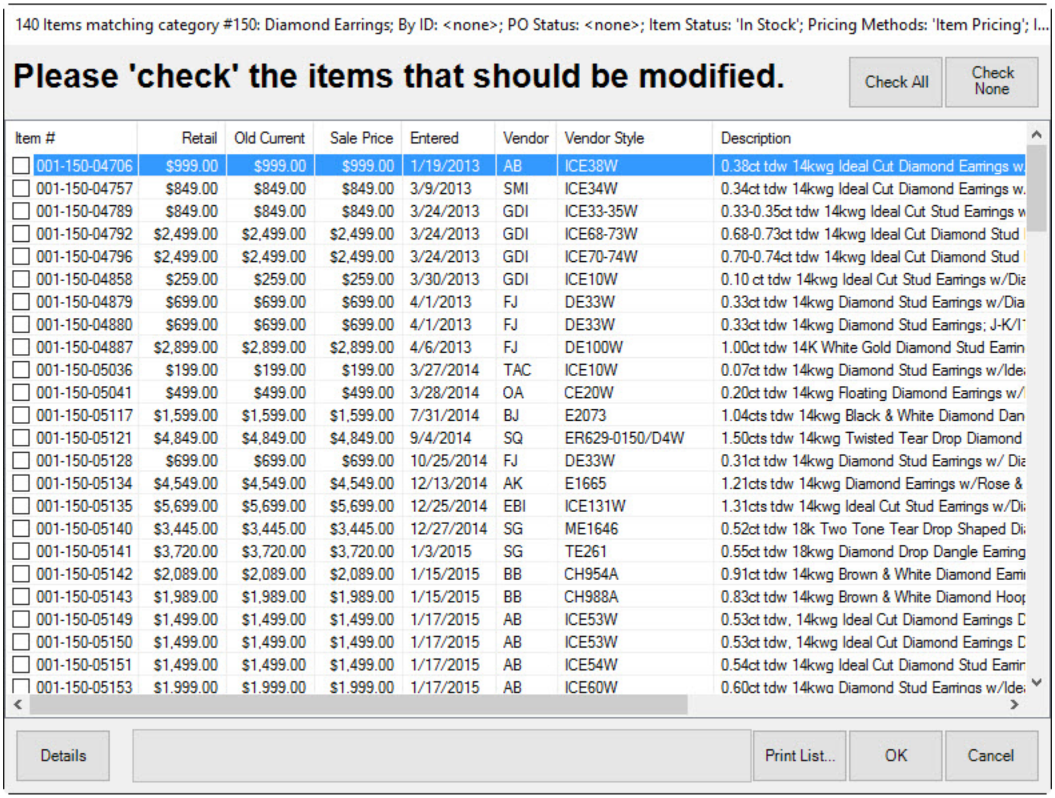


Discount 0.00%

Fields and options in the **Start a Sale** window include:

Item Filter	Presents a standard item filter to aid in narrowing down results.
Discount	The percentage discount to apply
Sign Type	The type of sign to generate for items put on sale
Sale Starts/Ends	The dates this sale will run (optional).
Skip items already on sale	If running multiple sales, items already on sale will not be affected by this new sale.
New Tags	Defines whether to generate new inventory tags for items put on sale.

2. Complete the fields as desired and select **OK**. The results window will appear.



140 Items matching category #150: Diamond Earrings; By ID: <none>; PO Status: <none>; Item Status: 'In Stock'; Pricing Methods: 'Item Pricing'; I...

Please 'check' the items that should be modified.

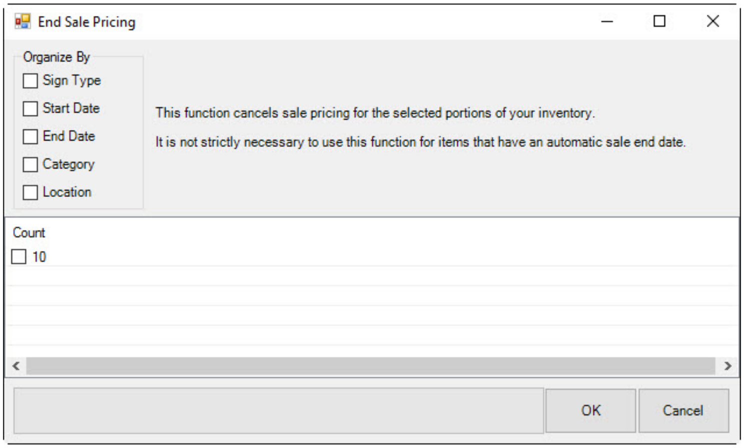
Item #	Retail	Old Current	Sale Price	Entered	Vendor	Vendor Style	Description
☐ 001-150-04706	$999.00	$999.00	$999.00	1/19/2013	AB	ICE38W	0.38ct tdw 14kwg Ideal Cut Diamond Earrings w
☐ 001-150-04757	$849.00	$849.00	$849.00	3/9/2013	SMI	ICE34W	0.34ct tdw 14kwg Ideal Cut Diamond Earrings w.
☐ 001-150-04789	$849.00	$849.00	$849.00	3/24/2013	GDI	ICE33-35W	0.33-0.35ct tdw 14kwg Ideal Cut Stud Earrings w
☐ 001-150-04792	$2,499.00	$2,499.00	$2,499.00	3/24/2013	GDI	ICE68-73W	0.68-0.73ct tdw 14kwg Ideal Cut Diamond Stud
☐ 001-150-04796	$2,499.00	$2,499.00	$2,499.00	3/24/2013	GDI	ICE70-74W	0.70-0.74ct tdw 14kwg Ideal Cut Diamond Stud
☐ 001-150-04858	$259.00	$259.00	$259.00	3/30/2013	GDI	ICE10W	0.10 ct tdw 14kwg Ideal Cut Stud Earrings w/Di
☐ 001-150-04879	$699.00	$699.00	$699.00	4/1/2013	FJ	DE33W	0.33ct tdw 14kwg Diamond Stud Earrings w/Dia
☐ 001-150-04880	$699.00	$699.00	$699.00	4/1/2013	FJ	DE33W	0.33ct tdw 14kwg Diamond Stud Earrings; J-K/I
☐ 001-150-04887	$2,899.00	$2,899.00	$2,899.00	4/6/2013	FJ	DE100W	1.00ct tdw 14K White Gold Diamond Stud Earrin
☐ 001-150-05036	$199.00	$199.00	$199.00	3/27/2014	TAC	ICE10W	0.07ct tdw 14kwg Diamond Stud Earrings w/Ide
☐ 001-150-05041	$499.00	$499.00	$499.00	3/28/2014	OA	CE20W	0.20ct tdw 14kwg Floating Diamond Earrings w/
☐ 001-150-05117	$1,599.00	$1,599.00	$1,599.00	7/31/2014	BJ	E2073	1.04cts tdw 14kwg Black & White Diamond Dan
☐ 001-150-05121	$4,849.00	$4,849.00	$4,849.00	9/4/2014	SQ	ER629-0150/D4W	1.50cts tdw 14kwg Twisted Tear Drop Diamond
☐ 001-150-05128	$699.00	$699.00	$699.00	10/25/2014	FJ	DE33W	0.31ct tdw 14kwg Diamond Stud Earrings w/ Di
☐ 001-150-05134	$4,549.00	$4,549.00	$4,549.00	12/13/2014	AK	E1665	1.21cts tdw 14kwg Diamond Earrings w/Rose &
☐ 001-150-05135	$5,699.00	$5,699.00	$5,699.00	12/25/2014	EBI	ICE131W	1.31cts tdw 14kwg Ideal Cut Stud Earrings w/Di
☐ 001-150-05140	$3,445.00	$3,445.00	$3,445.00	12/27/2014	SG	ME1646	0.52ct tdw 18k Two Tone Tear Drop Shaped Di
☐ 001-150-05141	$3,720.00	$3,720.00	$3,720.00	1/3/2015	SG	TE261	0.55ct tdw 18kwg Diamond Drop Dangle Earring
☐ 001-150-05142	$2,089.00	$2,089.00	$2,089.00	1/15/2015	BB	CH954A	0.91ct tdw 14kwg Brown & White Diamond Earri
☐ 001-150-05143	$1,989.00	$1,989.00	$1,989.00	1/15/2015	BB	CH988A	0.83ct tdw 14kwg Brown & White Diamond Hoo
☐ 001-150-05149	$1,499.00	$1,499.00	$1,499.00	1/17/2015	AB	ICE53W	0.53ct tdw, 14kwg Ideal Cut Diamond Earrings D
☐ 001-150-05150	$1,499.00	$1,499.00	$1,499.00	1/17/2015	AB	ICE53W	0.53ct tdw, 14kwg Ideal Cut Diamond Earrings D
☐ 001-150-05151	$1,499.00	$1,499.00	$1,499.00	1/17/2015	AB	ICE54W	0.54ct tdw 14kwg Ideal Cut Diamond Stud Earrin
☐ 001-150-05153	$1,999.00	$1,999.00	$1,999.00	1/17/2015	AB	ICE60W	0.60ct tdw 14kwg Diamond Stud Earrings w/Ide

3. Select items to include on the sale and select **OK**.

13.21 End a Sale

Though you can set the end date of a sale in **Start a Sale**, you can end sale pricing here as well. This can be useful to end sale pricing for items that are to be marked back up outside of the dates marked in the **Start a Sale** function. Like **Start a Sale**, this feature can be used for fine-item pricing and bulk UPC item pricing. To do so:

1. Select **Administrative ► End a Sale**. The **End a Sale** window will appear.



This function cancels sale pricing for the selected portions of your inventory.

It is not strictly necessary to use this function for items that have an automatic sale end date.

Fields and options in the **End Sale Pricing** window include:

Organize by	Indicates how ending prices should be selected. The items selected here will appear as columns to be selected from below.
Sign Type	Because sales often have a sign made for their particular event, the sign type may contain the appropriate association.
Start Date	Allows you to select items by sale start date.
End Date	Allows you to select items by sale end date.
Category	Allows you to select items by category.
Location	Allows you to select items by location.

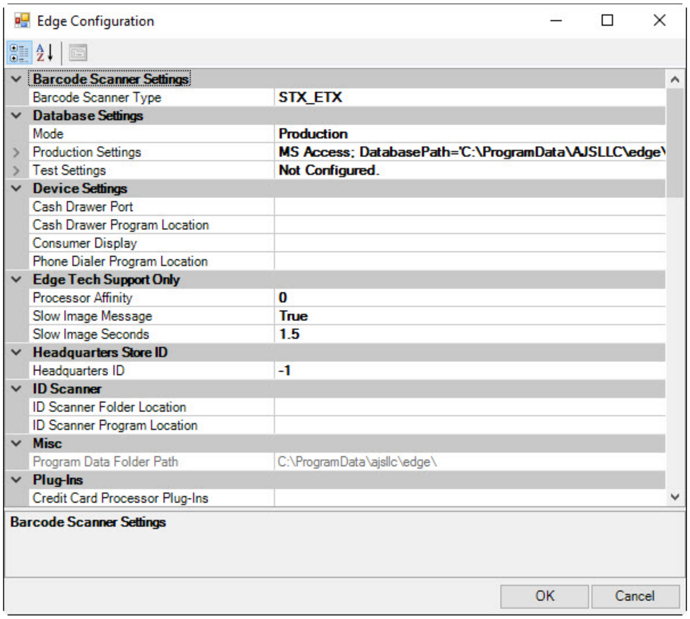
2. Select the items for which the sale price is to end and select **OK**. A confirmation window will appear.
3. Select **OK**.

13.22 Configuration Options

The Edge **Configuration** window contains settings that allow you to make hardware selections and make file location and data selections.

To access The Edge Configuration, select **Administrative ► Configuration**. The Edge **Configuration** window will appear. Alternatively, you can access **The Edge Configuration** through **Windows Start ► All Programs ► Abbott Jewelry Systems ► Administrative ► Configuration**.

For any of the sections that appear, select the plus sign to expand the options or the minus sign to collapse the listing. Notice that at the bottom of **The Edge Configuration** window, there is a description of the selected item along with applicable suggestions. Double-click on the data field to the right to either change the value or obtain a drop-down list of settings.



Barcode Scanner Settings	
Barcode Scanner Type	STX_ETX
Database Settings	
Mode	Production
Production Settings	MS Access; DatabasePath='C:\ProgramData\AJSLLC\edge\
Test Settings	Not Configured.
Device Settings	
Cash Drawer Port	
Cash Drawer Program Location	
Consumer Display	
Phone Dialer Program Location	
Edge Tech Support Only	
Processor Affinity	0
Slow Image Message	True
Slow Image Seconds	1.5
Headquarters Store ID	
Headquarters ID	-1
ID Scanner	
ID Scanner Folder Location	
ID Scanner Program Location	
Misc	
Program Data Folder Path	C:\ProgramData\ajsllc\edge\
Plug-Ins	
Credit Card Processor Plug-Ins	

Barcode Scanner Settings

13.22.1 Barcode Scanner Settings

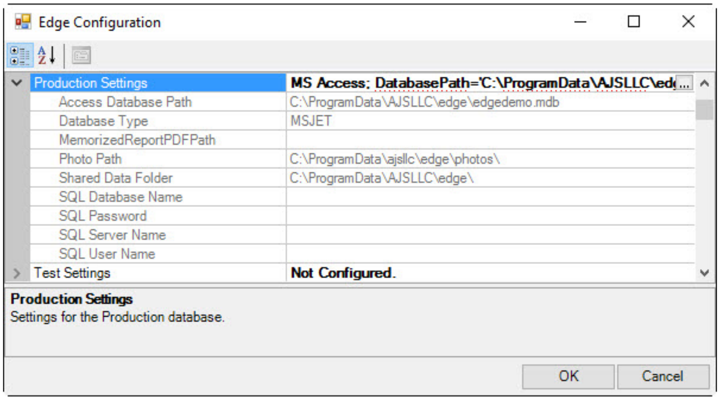
Barcode Scanner Type	Allows you to select a different scanner from the one prescribed in the setup instructions. Most scanners should use `SX/ETX`.

13.22.2 Database Settings

Mode	Specifies whether to start The Edge in Production or Test mode. If you have not selected a mode, you may be prompted to select a database at login.

Production Settings

Contains a number of options to specify the database and other file locations. If you expand the **Production Settings** entry, several options appear.

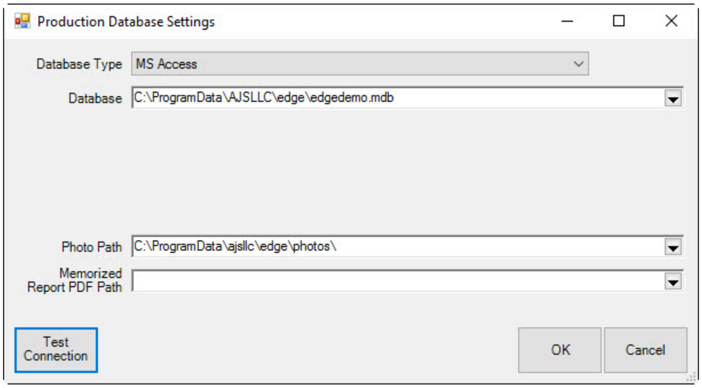


Production Settings	MS Access; DatabasePath='C:\ProgramData\AJSLLC\ed
Access Database Path	C:\ProgramData\AJSLLC\edge\edgedemo.mdb
Database Type	MSJET
MemorizedReportPDFPath	
Photo Path	C:\ProgramData\ajsllc\edge\photos\
Shared Data Folder	C:\ProgramData\AJSLLC\edge\
SQL Database Name	
SQL Password	
SQL Server Name	
SQL User Name	
Test Settings	Not Configured.

Production Settings
Settings for the Production database.

- **[Database Type] Database Path**: The database path as specified in the Production Database Settings window.
- **Database Type**: The type of database as indicated by the settings.
- **MemorizedReportPDFPath**: The folder to which memorized report PDFs should be saved.
- **Photopath**: The photo database path as specified in the **Production Database Settings** window.
- **Shared Data** folder: The path to shared data for synchronization purposes.
- **SQL Database Name**: If MSSQL, the database name.
- **SQL Password**: If MSSQL, the server password.
- **SQL Server Name**: If MSSQL, the server name.
- **SQL User Name**: If MSSQL, the user name.

Use the browse icon on the right to access the dialog that allows edits to these fields.



Database Type: MS Access
Database: C:\ProgramData\AJSLLC\edge\edgedemo.mdb
Photo Path: C:\ProgramData\ajsllc\edge\photos\
Memorized Report PDF Path:

Test Settings	Contains the path to the test database. See above for details.

File Locations specifies where The Edge should retrieve and store information. **DatabasePath** is used to direct The Edge to use a particular database. **PhotoPath** is used to direct The Edge to use a particular image folder.

The server computer should have local paths for these locations (e.g., `C:\Program Files (x86)\AJSLLC\EDGE\Edge.mdb`) while the workstations should have network paths (e.g., `\\[servername]\edge\edge.mdb`).

13.22.3 Device Settings

Device Settings contains settings for configuring a cash drawer to work with the software in an integrated fashion.

Cash Drawer Port	Used for drawers connected via a serial cable and references the serial port (e.g., `com1`) used.
Cash Drawer Program Location	The location of the program to open the cash drawer. For example: `c:\program files\cashdrawer\open.exe`.
Consumer Display	If you provide a monitor for the consumer to see the transaction, use this field to select it from the list.
Phone Dialer Program Location	The location of the program to dial the phone. If you have a fax/modem device configured for Windows on your machine, leave this blank, and The Edge will use that by default. If you have your own dialer program, then use this field to specify that. For example, it might read `c:\program files\MyPhoneSystem\DialThisNumber.exe`. This program must accept the phone number as the first argument on the command line.

13.22.4 Edge Tech Support Only

These options are to be configured by The Edge Support Team only. Do not change them unless directed to do so by an Edge representative.

13.22.5 Headquarters Store ID

This option specifies headquarters location for a multi-store environment. Do not change this unless directed to do so by The Edge Support Team.

13.22.6 ID Scanner

ID Scanner Folder Location	This is to indicate the folder to which scans are saved. For example: `c:\temp\idscan`.

ID Scanner Program Location	The location of the scanner program executable. For example: `c:\program files\idscan\idscan.exe`.

13.22.7 Misc

Program Data Folder Path	The location of the program data folder.

13.22.8 Plug-Ins

Credit Card Processor Plug-Ins	The plug-in for credit card processing, e.g., `c:\program files (x86)\ajsllc\edge\AcmeCreditCards.dll`.

13.22.9 Postcards

Name or IP Address of the Postcard Server	The name or path to the Postcard Server. Leave this blank unless told to do otherwise by The Edge Support Team.

13.22.10 RFID

RFID Config File Path	The location of the RFID configuration file. Use the standard Windows **Open File** window to find the file.
RFID Maintains Connection	Whether the RFID device maintains a connection while scanning.
RFID Server Type	The type of server for the RFID device.

13.22.11 Station ID

Each workstation in the store must have a station number so the system can report transactions. Likewise, each store has a store ID. You must set a unique station number for each station.

Station Number	The unique identifier of the workstation as determined at installation.
Store Number	The unique identifier of the store as determined at server installation.
Store Number Host	The store number of the store that houses the server. Use `-1` unless otherwise directed.

13.22.12 TagPrinter 1 Settings

The tag printers print to very small paper. Therefore, The Edge allows you to adjust printer settings to ensure proper printing on the tag.

Center Adjustment	Allows you to adjust the center space between ends of the dumbbell tag.
Left Edge Adjustment	Allows you to adjust the left edge of the label. Bigger is more to the right.

Number of Retries to Open Port	The number of times to retry opening the printer port before showing an error.
Port Number	The tag printer port, e.g., LPT1.
Special Strings to Begin Batch Print	Special strings to send before a batch of tags. Not supported by all tag printer models. Might override other settings.
Special Strings to End Batch Print	Special strings to send at the end of a printer batch. Not supported by all tag printer models.
Special Strings to Send on Individual Tag Print	Special strings to send before each tag. Not supported by all tag printer models.
Tag DPI	The dots-per-inch capability of tag printer 1.
Tag Printer Burn Settings	This allows you to adjust the burn setting. Higher is darker. Not all printer types allow this.
Tag Printer Make & Model	The make and model of the tag printer, e.g., `Eltron_2742`.
Tag Sensor Mode	The method by which the tag printer senses the start of the label.
Tag Stop Position	Millimeters to advance the tag printer after printing, to be pulled back before the next tag begins. Applies to Zip Tape only.
Top Edge Adjustment	Allows you to adjust the space to the top.

13.22.13 TagPrinter 2 Settings and 3 Settings

In the event you have more than one tag printer set up on your system, settings are made as described above.

13.22.14 Video Surveillance

These settings control the use of third-party video surveillance software/hardware with The Edge.

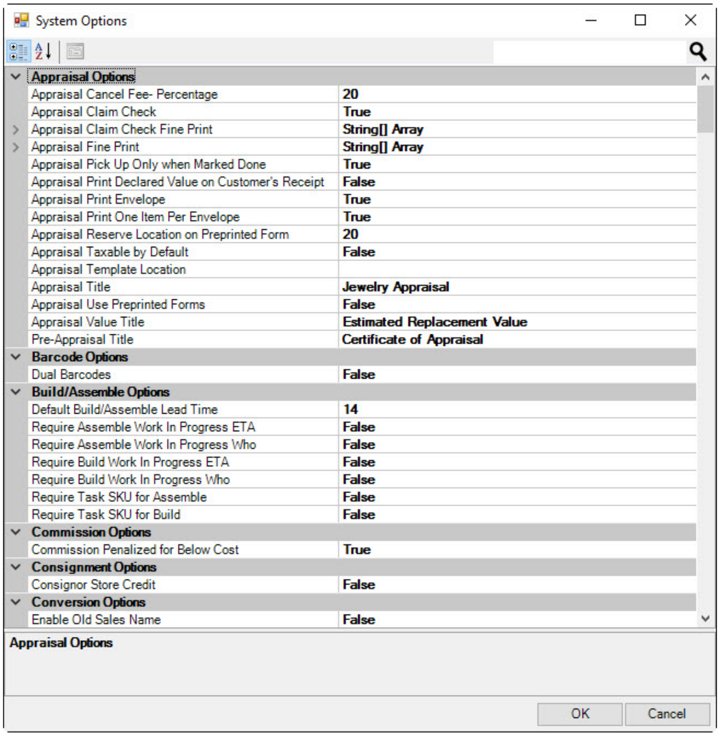
Video Surveillance Port Number	The port number of the video surveillance server.
Video Surveillance Server Name or IP Address	The server name or IP address of the video surveillance server.
Video Surveillance Server Type	The type of video surveillance server.

13.22.15 Vis Server

Name or IP Address of the Vis Server	The name or IP address of the Vis Server. Leave this blank unless otherwise directed by Edge Tech Support.

13.23 System Options

While **Configuration** handles hardware and file location settings, **System Options** is where transaction settings, default values, and data settings are handled.



Appraisal Options	
Appraisal Cancel Fee- Percentage	20
Appraisal Claim Check	True
Appraisal Claim Check Fine Print	String[] Array
Appraisal Fine Print	String[] Array
Appraisal Pick Up Only when Marked Done	True
Appraisal Print Declared Value on Customer's Receipt	False
Appraisal Print Envelope	True
Appraisal Print One Item Per Envelope	True
Appraisal Reserve Location on Preprinted Form	20
Appraisal Taxable by Default	False
Appraisal Template Location	
Appraisal Title	Jewelry Appraisal
Appraisal Use Preprinted Forms	False
Appraisal Value Title	Estimated Replacement Value
Pre-Appraisal Title	Certificate of Appraisal
Barcode Options	
Dual Barcodes	False
Build/Assemble Options	
Default Build/Assemble Lead Time	14
Require Assemble Work In Progress ETA	False
Require Assemble Work In Progress Who	False
Require Build Work In Progress ETA	False
Require Build Work In Progress Who	False
Require Task SKU for Assemble	False
Require Task SKU for Build	False
Commission Options	
Commission Penalized for Below Cost	True
Consignment Options	
Consignor Store Credit	False
Conversion Options	
Enable Old Sales Name	False

Appraisal Options

Note that the bottom of the **System Options** window contains a description of the selected option and suggestions for settings.

13.23.1 Appointment Options

How to Notify Associates of a New Appointment	When creating a new appointment, this will be the method for notifying the assigned associate of the task. Select from `Text` or `Email`.
Number of Next-Up Records Listed	Number of records to be listed for appointments to be worked. It is sorted by **End Date**.
Send Daily Email of Upcoming Appointments	Whether to send an email on a daily basis to each associate to inform them of the day's appointments.

13.23.2 Appraisal Options

Appraisal Cancel Fee – Percentage	How much should still be charged in the event someone cancels an appraisal request, as a percentage of appraisal fee.

Appraisal Claim Check	Whether a claim check should be issued for appraisal items.
Appraisal Claim Check Fine Print	The fine print that should appear on the appraisal claim check.
Appraisal Cost for New Appraisals	When intaking a new appraisal this is the default cost filled in.
Appraisal Fine Print	The fine print to appear on the bottom of the finished appraisal form.
Appraisal Pick Up Only when Marked Done	Allow only complete appraisals to be picked up as opposed to allowing unfinished items to be picked up.
Appraisal Print Declared Value on Customer's Receipt	Whether the estimated value of the item before appraisals will be printed on the customer's receipt.
Appraisal Print Envelope	Whether to automatically generate an item envelope.
Appraisal Print One Item Per Envelope	Whether each item in an appraisal request should be assigned its own envelope or all a customer's items can be grouped.
Appraisal Reserve Location on Preprinted Form	If you are printing an appraisal on a pre-printed form, this specifies the amount of space, in inches, to reserve at the top of the form.
Appraisal Taxable by Default	Whether appraisals are taxable by default.
Appraisal Template Default File	The location of the appraisal template file, e.g., `\\[servername]\data\appr.htm`. Leave this field blank to use the AJS built-in template. We recommend you speak with The Edge Support Team before changing this option.
Appraisal Template Folder Location	The location of the appraisal template file, e.g., `\\[servername]\data`.
Appraisal Title	The title of the appraisal document, e.g., "Jewelry Appraisal."
Appraisal Use Preprinted Forms	Whether to print appraisals on pre-printed forms. If `True`, The Edge will not print your store name and address.
Appraisal Value Title	The label the appraised value, e.g., "Replacement Value."
Pre-Appraisal Title	The title of the appraisal document for pre-appraised items, e.g., "Certificate of Sale."

13.23.3 Barcode Options

Dual Barcodes	Set to `True` if you have barcodes from an older system that are 8 digits long, and overlap Edge barcodes.

13.23.4 Build/Assemble Options

Default Build/Assemble Lead Time	The default number of days a build or assembly will take to complete.
Require Assemble Work In Progress ETA	Require that an ETA be entered for assemble jobs that are a work-in-progress.
Require Assemble Work In Progress Who	Require that the job **Who** field be completed for assemble jobs that are a work-in-progress.
Require Build Work In Progress ETA	Require that an ETA be entered for build jobs that are a work-in-progress.
Require Build Work In Progress Who	Require that the job **Who** field be completed for build jobs that are a work-in-progress.
Require Task SKU for Assemble	Whether to require that all tasks have a SKU in assembling items.
Require Task SKU for Build	Whether to require that all tasks have a SKU in building items.

13.23.5 Care Program

Can Discount Care Plans	Whether care plan fees can be discounted at POS. Options are: `Requires Override`: Requires an override to allow the discount. `Permission Check Only`: The Edge will check to see if the associate has permission to do this. `No Discounting`: No discounting will be allowed by anyone. `No Permission Checks`: Allows complete discounting without any checks.
Care Plan Max Return Period	The number of days that can pass before a care plan can no longer be returned. Check with your care plan provider for this information.
Care Plan POS Reminder	Text to appear in a reminder to your associates to ask the customer about a care plan. The default is `Did you talk to the customer about our Jewelry Care Program?` If you don’t wish to have a reminder pop up, then leave this field blank.

13.23.6 Commission Options

Commission Penalized for Below Cost	Whether to penalize commission if an item is sold below cost.

13.23.7 Consignment Options

Consignor Store Credit	Whether to create a store credit in the consignor’s account when the consigned item sells.

13.23.8 Conversion Options

Enable Old Sales Name	Enables finding converted cash customer sales by name. This does not work for all conversions.

13.23.9 Credit Card Options

Account Number Required (Last 4 Digits)	Require the last four digits of a credit card number when processing offline.
Address Verification System Copy from Customer	Set to `True` if you want to initialize the Address Verification System data from the customer record.
Authorization Code Required	Whether the authorization code is required when performing an offline entry of the credit card.
Authorization Code Visible	Whether the authorization code is visible when performing an offline entry of a credit card.
Batch Error Additional Emails	If there is an error in batch settlement, an error message will go to whoever is listed on The Edge license. This field allows you to list additional recipients. Use a new line for each recipient email address.
Customer Name Compare	Set to `True` if you want to compare the name on the credit card to what is on the magnetic strip when swiping.
Customer Name Required	Set to `True` if you want to require manual entry of the cardholder name when offline.
Customer Name Visible	Set to `True` if you want the **Cardholder Name** fields to appear on the tender window when offline.
Customer on File Required	Set to `True` if you require a customer to be in our database before you will accept a credit card.
Expiration Date Required	Set to `True` if you want to require manual entry of the expiration date when offline.
Expiration Date Visible	Set to `True` if you want the expiration date field to be visible when offline.
Signature Text	The text that appears under the signature line to indicate agreement to the terms of sale.
When is Address Verification System Required	Select the option for when customer's billing address is required for address verification: `Unknown`, `AlwaysOptional`, `RequiredForCNP`, `AlwaysRequired`.
When is the CVV Code Required	Select the option for when the CVV code is required: `Unknown`, `AlwaysOptional`, `RequiredForCNP`, `AlwaysRequired`.

13.23.10 Custom Job Options

Auto Fill Custom Job ETA	Prefill the **ETA** field for customer jobs to be this number of days, by default, after the take-in. To disable this feature, `enter -1`.
Custom Job Claim Check Fine Print	The fine print to appear on the bottom of the custom job claim check.
Custom Job Envelope for “Estimate Only” Jobs	Whether to print an envelope for an estimate-only custom job.
Custom Job is “Estimate Only” on Job Detail Sheet Fine Print	The fine print to appear on the job sheet if the custom job is only an estimate.
Custom Job Is “Estimate Only” Receipt Fine Print	The fine print to appear on receipts if the customer job is only an estimate.
Custom Job Require Photo on Intake	Whether a photo is required at intake.
Custom Job Tax With Custom Job Item	Whether to print job taxes with the customer job line, as opposed to the receipt subtotal.
Custom Jobs on Reports	How custom jobs should appear on the sales tax and activity reports.
Enable Custom Jobs	Whether to enable custom job features.
Place Cursor in Description Field on Start	When adding a task to a custom job, make sure the cursor stats in the description field instead of the SKU field.
Print Claim Check on Customer Section of Custom Job Envelope	Whether to print the claim check on the customer side of the custom job envelope. If **Print JLRC on Customer Section of Custom Job Envelope** is set to true, it will not print.
Print JLRC on Customer Section of Custom Job Envelope	The JLRC is the jeweler's commission, i.e., what you pay the goldsmith. This setting determines whether to print the JLRC slip on the customer side of the custom job envelope. If set to `True`, it overrides the claim check.
Require a Task SKU for Custom Job	Whether to require that each task have a SKU in custom jobs.
Tax Custom Job “Other”	Whether “other” custom job charges are taxable by default.
Tax Custom Job Labor	Whether custom job labor is taxable by default.
Tax Custom Job Parts	Whether custom job parts are taxable by default.
Use Time of Day for Custom Job ETA	Whether to record the time of day for the ETA.

13.23.11 Customer Options

Balances to Primary on Split	When splitting linked customer accounts (Spouse/Partner), whether all balances go to primary or are split between the two.

Convert Customer Name and Address on Receipts to Mixed Case	Whether to convert the customer name and address to mixed case on receipts.
Custom Field Names	Labels for custom fields.

Customer Duplicate Check	What action to take with regard to check for duplicate customers before adding a new one. Options are:
	`Check All Relevant Fields`
	`Check on Phone and Email Only`
	`Disable Only.`

Enable Customer Activity Tab Green Dot	Allows you to activate or deactivate the green dot indicating activity in the **Customer Activity** tab. The feature does demand database activity, so it might not be desired.
Guess Gender if Not Specified	Whether to try to guess the gender when not specified on a customer record.
Include Spouse/Partner Column on Customer List Views	Whether or not to include extra column for spouse information on customer list windows.
Include Spouse/Partner Name	Whether to include the spouse/partner's name throughout The Edge.
Lock Customer Notes After Save	Whether to prevent customer notes from being edited after saving.
Phone Number Format	Template that controls how phone numbers are formatted. Use 'x' in place of numbers, e.g. (xxx)xxx-xxxx, xxx.xxx.xxxx, xxx-xxx-xxxx. Note this option can potentially conflict with the **Validate That Phone Numbers Have 10 Digits** option if your phone number template contains less than 10 digits.
Show Dial and Email buttons on contacts screen	Show Dial and Email buttons on contacts screen next to the Edit controls.
Title Case Names	Whether to automatically set title case (capitalization) on names, addresses, and titles throughout the program.
Use Comma After City and Before State in Mailings and on Reports	Whether a comma should appear after the city and before the state in mailings and reports.
Use Period After Title in Customer's Name in Mailings and on Reports	Whether a period should appear after the title of part of a customer name on mailings and reports.
Validate That Phone Numbers Have 10 Digits	Validate that phone numbers have 10 digits in them. This is important if you will be using texting/SMS features.

13.23.12 Department Defaults

Default Appraisal Department	The appraisal department to which to default.
Default Custom Department	The custom work department to which to default.
Default Inventory Department	The inventory department to which to default.
Default Misc. Item Department	The miscellaneous department to which to default.
Default Repair Department	The repair department to which to default.
Default Trade Department	The trade department to which to default.

13.23.13 General Options

Ask "Are You Sure?" on Cancel	Whether to prompt "Are you sure?" when canceling an edit window where changes have been made, but not saved.
Enable ETA Is Estimated on Receipts	ETA will always print as estimated.
Enable Export Raw Report Data	Enables the ability to export raw data from the report viewer.
Enable Spell Checker	Enable spell-checking capability in all text fields.
Form Defaults Require Permission	Setting a form's defaults require permission.
Logo File Location	The location of the logo file for areas such as Receipts and Appraisals. It is best to keep the file in the configured photo folder. It can be .bmp, .jpg, .gif, or any other standard Windows image format. Because the logo will appear in a 2.25" x 2" rectangle, your logo file may be shrunk to fit in that space. Logo resolution should be the same as that for your receipt printing, usually 300 pixels per inch.
Maximum Number of Days Back for Sale/Sold Dates Searched Without Permission	The maximum number of days back an associate can conduct searches on sales dates without permission. Enter a value of `0` to always search without permission.
Print Non-Stock Job Envelopes to Report Printer	Print other (non-stock) job envelopes to the report printer.

Report Criteria Cover Page Default Setting	Set this to `True` to enable the **Report Criteria Cover Page** checkbox on the report query form by default. Set this to `False` to disable the **Report Criteria Cover Page** checkbox on the report query form; this will generate criteria headers on the top of the first report page.
Require Notes on Override	Whether to require an explanatory note when an override is made.
Show Background Texture	Whether to show background texture on the windows. Turn this to **False** for remote access.
Show Lines on Rapid Reorder Report	Set this to `True` to enable vertical column separators for the last 3 columns of the Rapid Reorder report.
Where to Place Help Button	Where on the form/window to place the **Help** button.

13.23.14 Gift Certificate Options

Enable Gift Certificate Button at POS	Set this to **True** to enable the **Gift Certificates** button in the **Point of Sale** window. Set to **False** if you do not use gift certificates.
Gift Certificate Border Options	What type of border should be printed on gift certificates.
Gift Certificate Font Used at POS	In what font the gift certificate will print out.
Gift Certificate Form Used at POS	The type of form on which gift certificates should be printed.
Gift Certificate Print Envelope	Whether to print a gift certificate envelope insert.
Number of Days a Gift Certificate Expires	How many days for which the gift certificate is valid.

13.23.15 Inventory Options

Allow User to Assemble Items	Whether to allow the user to assemble item in inventory.
Allow User to Build Items	Whether to allow the user to build item in inventory.
Allow Zero Costs	Whether to allow the cost of an item to be entered as zero.
Enable Master Vendor IDs	Whether to enable The Edge **Master Vendor ID** field.
Inventory Change Sold Item	Controls whether you need a manager override or just permission to make changes to sold items. Set to **Override** to require a manager override or **Permission** to only require the ability to edit items.

Inventory Item Description Auto Suggest	Controls whether a new description is automatically suggested when an item is edited and saved. Set to **True** to suggest a new description automatically or **False** to not suggest any changes (description can always be manually changed).
Inventory Protect Changes	Controls whether permission is required to save changes to existing items. Set to **True** to require permission or **False** not to require it.
Prompt Reprint Assembled/Built Item Envelope With a Status of Work In Progress	Prompt to reprint a built or assembled item envelope on save while it is a work in progress.
Protect Inventory Reports	Whether permission is required to run inventory reports.
Save and New Maintains Stock Type	If enabled, when selecting **Save & New** from an item record to create a new item record, the stock type will be carried over to the new item.
Trade Category	The default category for traded-in items. Use `0` to disable and allow them to remain uncategorized. For accounting purposes, we recommend a default.
Trade Vendor	The vendor to which traded-in goods will be attributed by default.
Trades Reduce Sales Tax Due	Whether a trade-in reduces the sales tax due.
Validate Retail Price Greater Than Cost	Whether to validate that the retail price of an item is greater than cost.
Vendor Style Number Minimum Length on Searches	The minimum length for a vendor style code in the use of searching for like items.

13.23.16 Layaway Options

Layaway Cancellation Fee – Percentage	The fee for a canceled layaway order in percentage of purchase price.
Layaway Claim Check Fine Print	The fine print to appear on the layaway claim check.
Layaway Minimum Deposit – Percentage	The minimum percentage of purchase price to collect for a deposit.
Layaway One Item Per Envelope	Whether each layaway item requires its own envelope or if all of a customer’s items can be grouped together.
Layaway Pay Commission on Layaway Creation	Whether commission should be paid when layaway is initiated or on pickup.

Layaway Print Claim Check on Customer Section of Envelope	Whether to print a claim check for the item on the customer section of the layaway envelope.
Layaway Print Envelope	Whether to print a layaway envelope insert.
Layaway Sales Tax is Collected When Layaway is Created	Whether tax should be collected when the layaway is first created.

13.23.17 Memo Out/On Approval Options

Memo Cancellation Fee – Percentage	The percentage charged on the cancellation of a memo out.

13.23.18 News Feed Options

RSS Feeds	Any RSS news feeds, one per line. Edit this ONLY at the direction of an Edge Support representative.

13.23.19 Notifications Options

Notification Field Displayed on Special Order Intake	Set to `True` if you want the **Notifications** field to be visible on special order intake. When used, notifications are sent to the customer when the item is entered into inventory. For more notification control, you may wish to do this manually on a case-by-case basis, in which case this value would be `False`.
Require Notifications on Appraisals	Set this to `True` if you want the Notifications field to be required on all appraisals.
Require Notifications on Custom Job	Set this to `True` if you want the Notifications field to be required on all custom jobs.
Require Notifications on Repairs	Set this to `True` if you want the Notifications field to be required on all repairs.
Require Notifications on Special Orders	Set this to `True` if you want the Notifications field to be required on special orders.

13.23.20 Physical Inventory Options

Display "Are You Sure?" on Partial Scan Bulk Change	Turns on a prompt to confirm the changing of bulk quantities during a physical inventory partial scan.
Require Physical Location For Inventory	Whether location is required on an inventory record for physical inventory.
Show Case List	Makes the Location list visible on the bottom of the **Physical Inventory** window.

13.23.21 Podium Options

Podium Contact Method	Contains options for sending texts and emails via Podium. Options are: `Only Send Correct Phone Email:` Without offering options at POS, Podium will automatically request a review provided correctly formatted information is provided. `Open Phone Email Selector Every Time:` Offers the prompt at POS with every customer transaction asking for verification of data and whether to send text or email. `Open Phone Email Selector When Defaults Not Correct:` If a phone number or email address is not available or in the correct format, the selector window will appear for further action.

Podium Retry Period	To ensure that your customers are not sent too many requests, this option allows you to select how many days should pass between requests. Podium sets the minimum at 60 days, but you can use this setting to increase the number of days.
Podium Send Always	If `True` then Podium will always send a request for any transaction. If `False`, then Podium will only send requests on appraisal pickup, customer job pickup, layaway pickup, memo pickup, repair pickup, gift cert sale, tender card sale, item sale, special order pickup, and trade in. It will not send requests for interim transactions such as repair intake. The default is `False`.
Use Podium for SMS	If True then text messages (SMS) for notifications will use the Podium platform. Marketing messages are never sent through Podium.

13.23.22 POS Options

Ask "Are You Sure?" When Cancelling an Order	Whether to include an **Are You Sure** prompt for canceling an order.
Cash Drawer Button	Controls the behavior of the cash drawer button.
Cash Drawer Options	Defines when to open the cash drawer.
Customer Add Screen	Select which customer add window to use in the **Point of Sale** window: `Fast` `Full`.
Display a Menu on Service Scan	Whether to enable scanned service action menu at POS. `True` enables a menu that will provide possible actions (payment / pick up / cancel) for this envelope when scanned. `False` will act immediately on the scanned envelope bringing it up for pick up if available, otherwise payment.
Enable Adding New Customers at POS	Whether to enable the **New Customer** button in the **Point of Sale** window.
Fast Customer Find Preferred Contacts Only	When using the fast customer find at POS, whether to return only preferred contact methods. `True` returns only preferred contact methods; `False` returns all matching contact methods. The Edge default is `True`.
Fast Customer Find Return Options	When searching using the fast customer find at POS, the results that will be returned. Options include: `Individual`: Returns only matching individual records `Couple`: Returns matching records from either individual in the couple.

Fast Customer Find Starting Field	When searching using the fast customer find at POS, what should be the default starting field, i.e., cursor placement. Options include:
	`Last name`
	`First name`
	`Phone`
	`Email`.

Flash Sale Line Buttons	Flash buttons on the sale line when indicated by certain pop-ups, flags, or other indicators.
Giveaway Threshold Amount – Percentage	If a giveaway exceeds this percentage of the other merchandise on the sale, an override is required.
Inventory Item Pop-Up at POS	Pop-up notes for inventory items when placed on a sale line.
Item Tax Override	Whether to enable the checkbox to allow an entire sale to be taxed as if it were a single item. This is useful in some states for "trade up" sales. This item is always set to **True** for stores located in Tennessee.
No Address on File	Defines the text to display at point of sale if the customer has no address on file.
No Email Address on File	Defines the text to display at point of sale if the customer has no email on file.
No Mailing Address	Defines the text to display at point of sale if the customer has one or more addresses on file, but none specified for as a mailing address.
No Phone Number on File	Defines the text to display at point of sale if the customer has no phone number on file.
No Preferred Email Address	Defines the text to display at point of sale if the customer has no preferred Email address selected.
No Preferred Phone	Defines the text to display at point of sale if the customer has no preferred phone number on file.
Occasion Days	If an occasion is within this many days, it will appear at point of sale.
Pay in Full Without Pick Up Options	Level of security needed to allow a job to be paid in full without picking it up. `No Check`: Anyone can pay in full without picking up. `Prompt`: Prompt when an attempt is made to pay in full without picking up. `Override`: An override is necessary when an attempt is made to pay in full without picking up.
Refund Limit Requires Override	Any refund, other than credit memo, great than this amount requires an override. Use `-1` to disable.
Require Address when Entering New Customer	Whether to require a customer address when a customer is added at point of sale.

Require Email when Entering New Customer	Whether to require that an email address be entered with a new customer record at POS. An override can allow the customer to decline.
Require Permission to Allow Tax Changes at POS	Level of security needed to change the change whether a sale is taxable. `No Permission Required:` Anyone can change tax. `Requires Permission:` Associate must have permission, but will not otherwise be prompted. `Requires Override:` Associate must have permission & will be prompted with an override window if trying to change taxable status.

Require Permission to Sell Item from Another Store	Whether to require permission when selling an item located in another store. Options are:
	`Do Not Require`
	`Ask Are You Sure?`
	`Require Override.`

Require Permission to Sell to Cash Customer	Require a permission check to make sales to the cash customer.
Require Phone Number when Entering New Customer.	Whether to require that a phone number be entered with a new customer record at POS. An override can allow the customer to decline.
Require Why In for Every Sale	Whether the **WhyIn** field is required.
Require Why In for New Customers	Whether the **WhyIn** field is required for new customers.
Restocking Fee for Returned Merchandise – Percentage	How much as a percentage of purchase price, if any, to charge for a restocking fee in a return transaction.
Returned Items when on a Sale with a Giveaway Item Options	Level of security needed to validate a return that has a giveaway as part of the sale. `No Check`: Anyone can perform this action. `Prompt`: Prompt when an attempt is made to perform this action. `Override`: An override is necessary when an attempt is made to perform this action.
Sell or Use Out of Stock Bulk Options	Controls what to do when a user attempts to sell or use an out-of-stock bulk item. There are three options: Ignore it, Ask "Are you sure?" and require an override.
Show Collection Pop-Up	If an item that is part of a collection, this option will enable a pop-up at point of sale to prompt the associate to suggest other items in the collection to the customer.
Show Customer Activity Summary at POS	Whether to show an activity summary at point of sale.
Show Customer Email at POS	Whether to show customer email at point of sale.

Show Customer Phone Number at POS	Whether to show customer phone number at point of sale.
Show Number of Items to be Picked Up or Make Payments at POS	Whether to show the number of transactions available for pickup/payment next to the corresponding button.
Show Only Selected Customer's Services	For linked customer accounts (spouse/partner), whether to show layaways, special orders, repairs, memos, and custom jobs on the Payment & Pickup buttons/screens for just the selected customer or for both the customer & their spouse.
Tax Refunded on Returns With No Receipt or Sale Record	Whether taxes are to be refunded on a return of an item with no receipt or sale record.
Update Sold Item SKUs from Other Stores	If enabled, if an item recorded as being in one store is sold in another, The Edge will update the item number to reflect the selling store.
Use Fast Customer Find at POS	When searching for customer as POS, this will bring up an abbreviated Customer Find window.
Use Small Task Lines for Repairs and Custom Jobs	Use small task line for repairs and custom jobs on intake at point of sale.
Why In Allow Typing	Set to `True` to allow users to type in the why-in reason. Otherwise they can pick from the list.
Why In is Optional if Sale Includes a Cancellation	Whether the **WhyIn** field is optional if the sale contains an order cancellation.
Why In is Optional Payment if Sale Includes a Payment on Account	Whether the **WhyIn** field is optional if the sale contains a payment on account.
Why In is Optional if Sale Includes a Pickup	Whether the **WhyIn** field is optional if the sale contains a pickup.
Why In is Optional if Sale Includes an Adjustment to Repair or Custom Job	Responding to the **WhyIn** field is optional if the sale contains an adjustment to a repair or custom job.
Why In is Optional if Sale Includes a Return	Whether the **WhyIn** field is optional if the sale contains a return.
Why In is Optional if Sale Includes an Intake	Whether the **WhyIn** field is optional if the sale contains an intake.

13.23.23 Postcard Options

Delete Temporary Postcard Job Files After Upload	Whether to delete postcard job files after a successful upload.

13.23.24 Pricing Options

Auto-Pricing Default Value	Specifies the default value of the **Auto-Price** option on the **Item** window.
Enable Auto-Pricing	Whether the auto-pricing features in **Automatic Markup** and **Automatic Markdown** should be enabled.
Enable Auto-Pricing for Item Edit	Whether auto-pricing occurs when you edit an item.
Round All Pricing to the Dollar	Rounds all pricing calculations to the nearest dollar.
Use Replacement Cost for Auto Markup	Whether to use Re-Cost for AutoMarkup.

13.23.25 Purchase Order Options

Open Previous Non-Submitted Purchase Orders	When starting a new purchase order for a specified vendor, any non-submitted purchase orders will be opened for additional items.
Purchase Order BCC Email Address	Email address(es) to use by default in the BCC email field in **Purchase Order Settings**. If there is more than one, separate them by semi-colons (;).
Purchase Order Email Address	The email address of the store when sending an email on a purchase order.
Purchase Order Most Recent Item Cost	If set to `True`, The Edge will use the most recent cost for the vendor style in the purchase order.
Save Most Recent Purchase Order Settings	If set to `True`, The Edge will save settings in **Purchase Order Settings** for future purchase orders.
Show Images by Default on Purchase Orders	If set to `True`, item images will be shown on the **Purchase Order** window.
Show Images by Default on Receive Invoice	If set to `True`, item images will be shown in the **Receive Invoice** window.

13.23.26 Receipt Options

If you obtain pre-printed forms on your own, you must do a test proof with The Edge and send it to us to be verified. This will ensure your pre-printed forms will fit our receipt layout. It may help to work with an Edge-approved vendor who will guarantee compatibility.

Ask Before Printing Receipt	Whether to offer a prompt or preview of a receipt before printing. `True` results in a prompt at point of sale with **Yes**, **No**, and **Preview** options.
Ask to Print Gift Receipt	Whether to remind the associate to offer the customer a gift receipt.
Description Length Limit	Because repair and appraisal descriptions can get quite long, this option allows you to limit the length of long description that will appear on the receipt.
Description Maximum Height	The maximum height of the printed description in inches. Repair and appraisal descriptions can get very long.
Donation Disclaimer	If desired, enter the text for a disclaimer printed with a donated item description.
Enable Emailing of Receipts	Enable receipt emailing.
Giveaway Disclaimer	If desired, enter the text for a disclaimer printed with a giveaway item description.
Number of Receipt Copies	Number of copies of the receipt to print.
Number of Repair Photos to Print	The number of photos to print on the repair receipt; the limit is eight.
Omit "Receipt" from Receipts	Whether the receipt should have the word "Receipt" on the top or not.
Preprinted Receipt Paper	Indicates whether receipts are preprinted with artwork or forms.
Print Associate's Last Name	Whether the sales associate's last name should appear on the receipt.
Print Barcodes	Whether barcodes containing such information as transaction IDs, item IDs, or customer IDs should be included.
Print Notifications on Envelopes	Whether to print notifications on envelopes.
Print Store Name on Preprinted Receipts	If receipt paper is preprinted, then print store name on store copy.
Print Tear Guide	Whether a dashed line indicating where the receipt should be torn off should appear.

Receipt Disclaimer	Disclaimers (e.g., warranty limitations, etc.) that should be included on the receipt. This can be used for marketing or other messages as well. To enter such text, select the **…** button in the **Disclaimer** field. A text editor will appear in which to enter the message. Select **OK** to save it. **To enter a blank line, type `[blank]` (including the brackets) for each line. You can add additional lines before preprinted items to push text up or after preprinted items to push text down.**
Receipt Preview	Whether the receipt should appear in print preview before being printed.
Repair Price Breakdown	Whether to breakdown repair prices between parts/labor/other on the receipt.
Repair/Custom Job Tax With Line Item	Whether to print repair taxes with the repair, not with the receipt subtotal.
Reserve Height for Preprinted Name and Address	Height of the preprinted name and address.
Show Balances on Receipts	Whether the customer's balances should appear on the receipt.
Show Customer's Address and Phone Number on Receipt	Whether the customer's address and phone number should appear on the receipt.
Show Customer's Email Address on Receipt	Whether to print a customer's email address on printed receipts.
Show Discount Percentage Threshold	If discount exceeds this amount, the discount will be printed on the receipt.
Show Discounts on Each Line	Whether the discounts on each item should appear on the receipt.
Show Expired Rewards on Receipts	Set to `True` to show expired rewards card balances on receipts with the expiration date.
Show Photos	Whether to print item images on the receipt.
Show Store Credit Balance on Receipts	Whether to show the store credit balance, if any, on each receipt.
Special Order Tax with Special Order Item	Print special order tax with the order, not with the receipt subtotal.
Where to Print Anti-Piracy ID	Where to print anti-piracy ID for preprinted paper. We insist that your name and store number be used on all pre-printed forms. To accommodate a variety of designs, we give you a choice as to where this information will appear.

13.23.27 Repair Options

Enable Repairs	Whether to enable the repair job features.
Enforce See Cost on Jobs	Requires permission see costs and adjust cost on repairs.
Job Envelope Due Date Adjustment	Number of days to subtract from actual due date when printing repair due date on repair envelope.
Match Partial Repair Task SKU	If the user types in a task SKU that matches one SKU exactly, but is also a partial match for others, whether to list all results or just the matching one.
Maximum Height in Inches for JLRC Task Description	The maximum height, in inches, of the task description. This also applies to custom jobs.
Move Services Permission Check Only Once	If set to True, the system will only require you to login when the Move Envelope screen is first opened and will not time out. It remains logged in until you close out of this screen.
Number of Days to Auto-Fill Repair ETA	Prefill the ETA field for repairs to be this number of days after take-in. To disable this feature, enter `-1`.
Preprinted Envelope for Repairs/Custom Jobs	Whether the envelope has a preprinted image for repairs and custom jobs.
Print Balance Due on Repair/Job Envelope	Whether to print the balance due on the repair/job envelope.
Print JRLC on Customer Section of Envelope	Whether to print JLRC slip on the customer side of the repair envelope. This overrides the claim check.
Print Repair Envelope for “Estimate Only” Repairs	Whether to print an envelope for an “estimate only” repair job.
Print Repair Information on Each Page of Envelope When Multiple Pages	When printing a multi-page repair envelope, whether to repeat the repair information at the top of each page.
Repair “Other” Taxable by Default	Whether to include applicable tax on other charges of a repair.
Repair Claim Check	Whether to generate a claim check for the repair.
Repair Claim Check Fine Print	The fine print to appear on the bottom of the repair claim check.
Repair Envelope Print Customer Name and Phone Number	Whether the envelope should include the customer’s name and phone number.

Repair Express Service Labor Charge – Percentage	Percentage to increase labor cost for express service. For example, enter `25` to pay your goldsmith 25 percent more for express service.
Repair Express Service Markup – Percentage	The percentage markup, if any, on a rush order.
Repair Job Sheet Fine Print for when Repair is an "Estimate Only"	If the repair is only an estimate, the fine print to appear on the job sheet.
Repair Labor Taxable by Default	Whether to include applicable tax on the labor of a repair.
Repair One Item Per Envelope	Whether only one item to be repaired can be included in an envelope or all of the customer's repairs can be grouped together.
Repair Parts Taxable by Default	Whether to include applicable tax on the parts of a repair.
Repair Price Printed on Envelope	Whether to include the price of the repair on the envelope.
Repair Print Declared Value on Customer's Receipt	Whether to include the declared value of the item on the envelope.
Repair Print Envelope	Whether a repair envelope should be generated.
Repair Print Store Address on Repair Envelope	Whether the envelope should include the address of the store where the repair was initiated.
Repair Receipt Fine Print for when Repair is an "Estimate Only"	If the repair is only an estimate, the fine print to appear on the receipt.
Repair Require Cost When Marking Task Done	Whether cost is required in order to mark a repair as done.
Repair Require Declared Value at Repair Intake	Whether a declared value must be included in the record.
Repair Require Part Status when Marking a Task Done or Cancelled	When marking a task done or cancelled, require all parts be either received or cancelled.
Repair Require Who on Done	The **Who** field is required to list the task as `Done`.
Repairs Displayed on Reports	Indicates how repairs should appear on sales tax and activity reports.
Repair Pickup Only when Marked Done	Allow only completed repair items to be picked up.

Repairs With Negative Values Requires Override	If a task value is negative on a repair, an override will be required.
Require "Condition" at Repair Intake	Whether condition of the item is to be required at intake.
Require Declared Value for Customer Owned Parts	Whether it is require to include declared value of customer-owned parts that are used on repairs and customer jobs.
Require ETA at Repair Intake	Whether to require ETA at repair take-in.
Require ID & Password on Repair Intake	Whether repair intake transactions require an ID.
Require Photo at Repair Intake/Edit	Whether a photo is required at intake or edit.
Require Reason Code from Repair Adjustment List	Whether to require a reason code when adjusting a repair or custom job.
Require Repair Deposit when Declared Value is Below this Dollar Amount	Items to be repaired that have a declared value lower than this amount will require the user to enter a deposit amount, which could be `$0`.
Require a Task SKU for Repairs	Whether to require that each task have a SKU for repairs.
Silently Mark All Tasks Done	When scanning a job done, silently mark all tasks done without asking (also applies to custom job).
Start Cursor in Repair Task Description Instead of SKU	When adding a task to a repair, make the cursor start in the **Description** field instead of the **SKU** field.
Use Time of Day for Repair ETA	Record the time of day for ETA.

13.23.28 Service Options

See Cost on Job Details Email	Level of security needed to view Cost on the Job Details email: `Warn`: Warn before sending email with Cost displayed. `Do Not Warn`: Do not warn before sending email with cost displayed. `Override`: Override is necessary to send cost on email.

13.23.29 Special Options

This is a collection of keywords that we may define for special purposes. Do not enter anything here unless directed to do so by The Edge Support Team.

13.23.30 Special Order Options

Special Order Cancellation Fee – Percentage	The amount, if any, in percentage of purchase price, should be charged if a special order is canceled.
Special Order Claim Check Fine Print	The fine print to appear on the special order claim check.
Special Order Enable Sales Tax by Default on Special Order Intake	The default value of the sales tax checkbox at special order intake.
Special Order Minimum Deposit – Percentage	The amount, if any, in percentage of purchase price, should be required for a deposit.
Special Order One Item Per Envelope	Whether only one special order item can be included in an envelope.
Special Order Print Claim Check on Customer Section of Envelope	Whether to print claim check on customer section of the special order envelope.
Special Order Print Envelope	Whether a special order envelope should be generated.
Special Order Start Date	The date after which special order will be available for purchase orders.
Special Order Store Address Prints on Envelope	Whether to print the store address on the special order envelope.
Special Order Suggest Description Contains Equal Signs	When doing a special order intake, whether the suggested item description generated by The Edge from the item details shows a listing using details labels, equal signs, and values.
Special Order Vendor ID Required	Whether the vendor information must be included in the record.

13.23.31 Statement Options

Generate Statement for Customers With Activity but a Negative Ending Balance	Whether to generate a statement for a customer who did have activity in the period, but now has a negative balance. Make sure you comply with any legal requirements in your jurisdiction.
Generate Statement for Customers With Activity but a Zero Ending Balance	Whether to generate a statement for a customer who did have activity in the period, but now has a zero balance. Make sure you comply with any legal requirements in your jurisdiction.

Statement "From Address" Location Adjustment	When statements are printed, the amount, in 1/1440ths of an inch, the "from address" value should be moved up, down, in overall width, and in overall height.
Statement "To Address" Location Adjustment	When statements are printed, the amount, in 1/1440ths of an inch, the "to address" value should be moved up, down, in overall width, and in overall height.
Statement Closing Date	The day of the month for statement closing date (1-31). Will automatically use the last day of February if 29, 30, or 31 is selected.
Statement Due Date Days After Statement End Date	Due date calculated by adding this number of days to the statement end date.
Statement Wording For Dates Outside the Current Period	Wording used in override message and in statement footer when the dates do not conform to the posting dates. The default text is "The dates used to print this Statement do not conform to the current closing / print dates."
Statement Wording Interest	Wording for interest and average balance. Ensure that your wording meets legal requirements.
Statement Wording Minimum Amount Due	Wording for minimum payment and due date. Ensure that your wording meets legal requirements. This field is limited to 110 characters.
Statement Wording When House Account Balances Have Been Estimated	Used primarily when upgrading to v. 6.1 and initially using the Aging function, indicates the wording to be used on statements that have been generated using an estimated balance.
Statement Wording When Running Without Closing	Wording used in the override message and in the statement footer when the statement has been printed before closing the current period.
Statement Wording When Store Charge Account Balance Thresholds Are Set	If using account balance thresholds to waive interest if a customer pays a specified amount of balance, this is the message that displays on the statement informing the customer how much must be paid in order to avoid the finance charge.

13.23.32 Store Charge Options

Everybody Can Charge	Set this to `True` to allow all customers to use a store charge or house account. Set this to `False` to check if the customer is set up for a store charge or house account before allowing it at point of sale.
Store Charge Account Balance Threshold Dollar Amount	Works in conjunction with Store Charge Account Balance Threshold Percentage. Allows you to waive the monthly finance charge if a payment was made. Payment must meet threshold percentage or dollar amount entered here, whichever is greater. This does NOT work unless you also set Store Charge Account Balance Threshold Percentage.

Store Charge Account Balance Threshold Interest Waived Message	If set to True, the statement will show a line item showing the interest being waived.
Store Charge Account Balance Threshold Percentage	Allows you to credit the last monthly finance charge if a payment on the store charge account balance is at least this percentage of the full balance.
Store Charge Interest Rate – Percentage	The interest rate to be charged on outstanding store charge balances as a percentage.
Store Charge Minimum Fee – Dollar Amount	Store charge minimum fee (finance charge) as a dollar amount. Note this only applies to store charge balances.
Store Charge Minimum Payment Due – Dollar Amount	The minimum payment expected on outstanding store charge balances, expressed as a flat dollar amount. **If both Store Charge Minimum Payment Due – Percentage and Store Charge Minimum Payment Due – Dollar Amount are specified, then the greater of the two calculations will be used. If the minimum payment calculation returns an amount higher than the outstanding balance, then the outstanding balance amount will be used as the minimum payment amount.**
Store Charge Minimum Payment Due – Percentage	The minimum payment expected on outstanding store charge balances, expressed as a percentage of the outstanding balance.
Waive Interest if Balance is Zero Anytime During Period	Whether to charge interest on a store charge (house account) if the balance was zero at any time during the billing period.
Waive Interest if Ending Balance was Zero	Whether to charge interest if the balance was zero at the end of the billing cycle.
Waive Interest if Starting Balance was Zero	Whether to charge interest if the balance was zero at the beginning of the billing cycle. Also known as a grace period.

13.23.33 Store Options

Store Number	Sets the store number within the system for identification purposes.

13.23.34 Task Options

Add Task Screen	When adding a task, choose whether to use the **Add Task Form** or **Add Task Wizard**. Additional options allow you to use the Form with a link to the Wizard and vice-versa.

Add Tasks on Start Date to Daily Email	Set this to True to have tasks appear on associate's daily email on the task's Start Date, otherwise it will show on the task's Due Date.
Send Daily Email of Tasks	Set this to True to send each associate a daily email of tasks due or starting today. If the Edge is running, the daily email is sent once each morning, otherwise it will send the next time the software is started.
New Task Default Notify	The default notification method used when creating a new task. Choose between email, SMS (text), both, or neither.
Task Lead Time	Task **Due Date** will default to this number of days in the future, e.g. enter 1 to always default due date to tomorrow.

13.23.35 Tender/Rewards Cards Options

Earned Rewards Reduced on Return Receipt Wording	How to word returned deduction from rewards earnings on the receipt.
Enable Rewards Cards	Whether to enable rewards cards.
Enable Tender Cards	Whether to enable tender cards.
House Card Wording POS Button	A general phrase that describes either a tender card or rewards card. Used only on the tender buttons on the **Point of Sale** window.
Referral Card Wording	How you refer to the card you give to a customer to in turn give to another.
Referral Wording	What you call the credit you give a customer for referring someone.
Rewards Cap Earned Per Item	Caps how much can be earned in rewards per sale item. Set this to `-1` if you do not want a cap.
Rewards Cap Per Sale	The total amount that a sale can earn in a single rewards transaction. For example, if a sale is supposed to earn $350 in rewards, but a cap of $250 is set, then the sale will earn $250. If set to `-1`, the cap will be ignored.
Rewards Card Maximum Initial Bonus	Maximum initial bonus that can be given without an override.
Rewards Card Prefixes	Prefixes that identify rewards cards.
Rewards Card Wording	How you refer to your Rewards or Loyalty cards.
Rewards Earned Wording	How to word reward earnings on a receipt. It might be best for sales tax purposes to word it as some kind of future discount. For example, "This purchase has earned you ___ in future rewards discounts" where the blank is replaced by some dollar amount.
Rewards Redemption Receipt Wording	How to word reward card redemption on the receipt. It might be best for sales tax purposes to word it as some kind of discount.
Rewards Use Vendor Filters	Allows for items that pay out rewards to be filtered by vendor.

Tender Card Prefixes	Prefixes that identify tender cards.
Tender Card Wording	How you refer to your tender/give/refund cards.
Use Category Filters With Rewards	Allows for items that pay out rewards to be filtered by category.

13.23.36 Time Card Options

Show Elapsed Time as Hours and Minutes	Whether to show time as hours and minutes or just hours with decimals. Values are true or false. For example, `True` would indicate you wish to show hours and minutes, e.g., 3 hours and 30 minutes. `False` indicates the time should be shown in decimal hours, e.g., 3.5 hours.

13.23.37 Wish List Options

Wish List Commission Split	How to split the commission on items sold from a wish list. `0` means all commission goes to the associate who enters the item on the wish list. `100` means that all commission goes to the associate(s) who sell(s) the item. Enter a number between `0` and `100`.
Wish List Deletion Options	Level of security required to delete a wish list entry. `Any`: Anyone can delete a wish list entry. `Permission`: Permission is required to delete a wish list entry. `Override`: An override is necessary to delete a wish list entry.

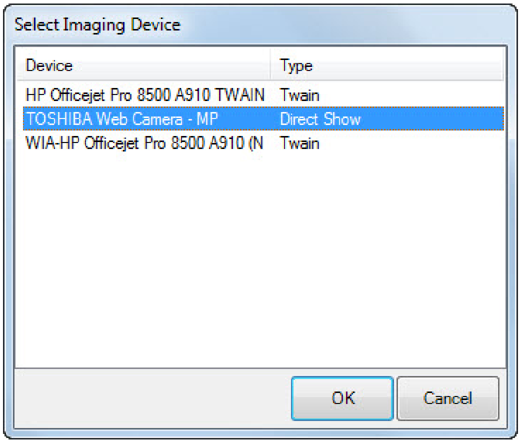
13.23.38 Wording Options

"No Sale" Tracking Wording	How you wish to label the **No Sale Tracking** button.
Credit Memo Wording	What you wish to call a credit when issued in lieu of a cash refund.
Discount Wording	How you refer to a customer credit in lieu of a cash refund.
Giveaway Wording	How giveaways should be worded in the **Point of Sale** window and on receipts.
House Account Wording	What you wish to call the use of a house account or store charge.
No Image Available Wording	Wording displayed on an image when the image is not available. If this value is left blank, nothing will show where the image would appear. This affects reports only.
Shipping & Handling	What you wish to call shipping and handling charges on a receipt.

13.24 Select Photo Device

In **Select Photo Device**, you select the twain compliant device to use as your default camera. To select a photo device:

1. Select **Administrative ► Select Photo Device**. The **Select Source** window will appear.



Select Imaging Device

Device	Type
HP Officejet Pro 8500 A910 TWAIN	Twain
TOSHIBA Web Camera - MP	Direct Show
WIA-HP Officejet Pro 8500 A910 (N	Twain

There will usually be only one device from which to select. If you have more than one device installed, however, all device options will appear.

2. Select the desired device.
3. Select **Select**.

13.25 Credit Cards

The Edge Integrated Payment Processing system allows you to process credit and debit card payments right at your Edge workstation, using magnetic strip cards, EMV cards (chip on card), NFC wireless payment methods such as Apple Pay and tap-and-go cards, and manual key. This saves time, improves customer service and eliminates errors associated with keying dollar amounts into two different devices.

This solution consists of several components. There is the merchant services provider, the “middleware,” the terminal devices, and The Edge integrated payments feature.

Merchant Services Provider

A merchant services provider (or “processor”) establishes your merchant account and provides for credit and debit authorizations. Merchant services providers fall into three categories: Edge Certified Partners; Jewelry Industry Group Members; and Bring Your Own (BYO). We recommend Edge Certified partners for a number of reasons.

We have special relationships with several national merchant processors. We urge you to consider using them because we work closely and often with each of them and can therefore provide you with the most satisfying integration experience, especially when it comes to setup and troubleshooting.

In most cases, Edge Certified Partners will cover the cost of the middleware, The Edge integrated payments feature, and one or more EMV devices (exact number of devices depends on your transaction history). Please contact us to ask about the Edge Certified Partner most appropriate for you.

Middleware

The middleware is third-party software that provides a consistent interface to a variety of different processing platforms and plays the biggest part in compliance with PCI (payment card industry) regulations. The exact middleware installed in your store will depend on your choice of merchant service provider.

EMV/Terminal Device

You will need an EMV capable device. This device consists of a pin pad, display, EMV slot, magnetic strip slot and NFC capability for Apple Pay and other wireless payment methods. Some EMV devices connect directly to your workstation via USB, others connect to your local area network via an Ethernet cable.

The Edge Integrated Payments Feature

Because payment processing requirements are subject to change, we provide the Edge integrated payments feature on an annual subscription basis.

Other Requirements

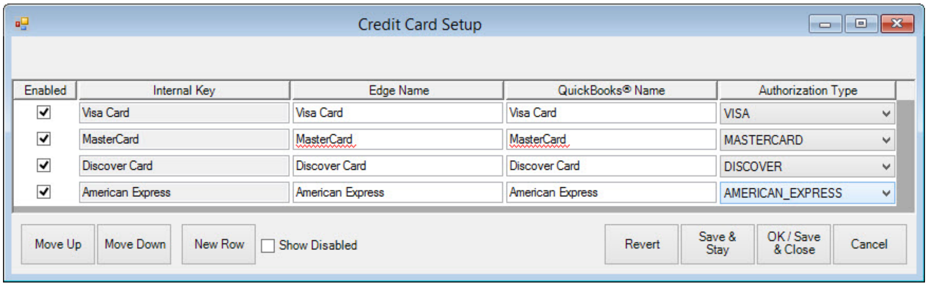
- Windows 7 or higher is required.
- Authorizations are obtained over the internet; you must have reliable internet service in the store.
- If your EMV device is USB-connected, your workstation must have an open USB port (USB version 2.0 or higher).
- If your EMV device is Ethernet-connected, you may need additional cables and/or Ethernet switches.

Contact The Edge Customer Service Team so we can help select the best solution for you.

13.25.1 Credit Card Types

In this section, we will discuss adding card types to your system. To accept credit cards as payment, see the section entitled Tender Options. To set up a credit card in The Edge:

1. Select **Administrative ► Set Up Card Types**. The **Credit Card Setup** window will appear with a list of currently recorded cards.



Enabled	Internal Key	Edge Name	QuickBooks® Name	Authorization Type
☑	Visa Card	Visa Card	Visa Card	VISA
☑	MasterCard	MasterCard	MasterCard	MASTERCARD
☑	Discover Card	Discover Card	Discover Card	DISCOVER
☑	American Express	American Express	American Express	AMERICAN_EXPRESS

Fields and options in the **Credit Card Setup** window include:

Enabled	Whether the card is enabled in The Edge.
Internal Key	The unique name for the credit card. It can be the same as The Edge name or the QuickBooks name, but must be unique.
Edge Name	The name for the card as it appears on The Edge **Point of Sale** window.
QuickBooks Name	The name used for mapping to QuickBooks.

If integrated with QuickBooks, there must be a payment method that matches the QuickBooks name exactly (with case sensitivity).

Move Up/Move Down	Used to reorder the list.
New Row	Used to create a new credit card record.

2. Select **New Row**. A blank row will appear at the bottom of the list.
3. Complete the fields as required.
4. Select **OK/Save & Close**.

To edit an entry:

1. Select the field to edit.
2. Make changes as required.
3. Select **OK/Save & Close**.

13.25.2 Credit Card Settlement

To receive payments from credit card transactions, settlement is required. Credit card settlement varies greatly based on the type of integration your credit card system has within The Edge and your processing company. Contact your credit card processing company for instructions on settlements. If there is an error in batch reconciliation, an error message will go to whoever is listed on The Edge license. **System Options** may allow additional recipients.

If you're working with one of our integrated partners, The Edge support can also provide guidance.

For TSYS, each PAX S300 card reader is independent of the others and each has its own batch. If you must void a transaction, it must be done at the same workstation/device. If you want to manually process a batch settlement, you must do so at the workstation where the transaction originally took place. There is no need to do a batch settlement at all as these devices will automatically settle at 11:30 to 12:00 midnight local time. To manually settle the batch:

1. Go to **Administrative ►Credit Cards ► Daily Settlement**. Unsettled amounts will appear.
2. Verify that the dollar amount in the batch matches activity for the period to be settled.
3. Select **Close the Batch**. You'll be prompted to confirm.
4. Do so. Credit card transactions since the last settlement will be settled.

13.25.3 Credit Card FAQs

Question: Where do I batch out at the end of the day?
Answer:
To receive payments from credit card transactions, settlement is required. Most credit card processors set up clients to automatically settle batches at a specific time of day. In addition, most processors support manual settlement. Please contact your processor to see how your account is setup. Note that processors may charge a fee for multiple daily settlement. See the section entitled Credit Card Settlement for instructions on manual batch settlement.

Question: I have a new credit card device I need to add to my existing credit card setup. What do I do?
Answer:
Contact your credit card processor to set up a time for configuration of the new system.

Question: I'm replacing my server; will we be able to process credit cards?
Answer:
During the time of replacement, you will not have access to credit cards; you should contact your credit card processor for a temporary solution. Once your new server is in place and the processor software is reinstalled and configured, you can continue to process credit cards.

13.25.4 Credit Card Troubleshooting

Contact information for your processor is available from the Credit Card window.

Problem: Cannot Connect to Credit Card Server
Cause(s)/Solution(s):

- NETePay is not open. Open NETePay.
- A card reader is not connected to the workstation. Check card reader connection.
- Firewall issue. Check firewall settings to ensure they permit reader transactions.
- Internet access is down. Troubleshoot the Internet connection.
- IP Address is not static. Check server name or server IP address to make sure it is static. If necessary, contact your Internet Service Provider and request a static IP.

Problem: Maximum Number of Lanes Already Reached
Cause(s)/Solution(s):

- Maximum number of licensed lanes has been reached. Call The Edge sales for additional lanes.

Problem: Declined Card
Cause(s)/Solution(s):

- For VX805, use date YY/MM not MM/YY.
- Card declined by card issuer. Try another card.

Problem: Card Swipe Does Not Respond
Cause(s)/Solution(s):

- Not selecting **OK** in The Edge **Credit Card Tender** window before beginning the swipe, insertion, or tap. Select **OK** before processing the card; this tells The Edge to start interacting with the terminal device.
- The terminal device may not be properly connected. Check the connection.

Problem: There Was an Error on a Transaction Causing "AP Dupe"
Cause(s)/Solution(s):

- Brief network issue that caused the transaction to authorize successfully with card processing company but not communicated back to The Edge: Look at batch totals to determine what was approved on card processor side and verify against sale causing error. Enter the transaction into The Edge using the **Offline** tab.

Problem: Main Workstation Crashed
Cause(s)/Solution(s):

- System crash: If it's a total system crash, call The Edge. If it is only credit cards that are crashed, call your processor for emergency support. You may need to do both.

Problem: Internet is Down
Cause(s)/Solution(s):

- Internet is down: Call voice authorizations into card processor and enter transactions into The Edge using the **Offline** tab.

Problem: Batches Don't Match
Cause(s)/Solution(s):

- When closing the batch, the batch totals between the processor's server and The Edge records don't match. Call The Edge Technical Support.

Problem: Merchant ID Does Not Match License
Cause(s)/Solution(s):

- Merchant ID in The Edge **Credit Card Setup** doesn't match that in your Edge license. Check the license file and update it if necessary. It may be necessary to contact the processor to verify an accurate MID.
- Internet service is down: Reestablish connection.
- NETePay is not running: Restart NETePay.

Problem: Track 2 Error
Cause(s)/Solution(s):

- The card may have been processed through the terminal device too quickly or too slowly. Swipe, insert, or tap again.

Problem: Component with SLSID Failure
Cause(s)/Solution(s):

- The active control (DSIPDCX) that talks to NETePay was not installed. Call The Edge Technical Support to have DSIPDCX reinstalled and retested.

Problem: ComPort Not Found in XML Document
Cause(s)/Solution(s):

- The user is not logged in the account that was set up in for credit cards: Log out and log into the account they were set up under (usually the ADMIN account) and call the processor to have them set up under the other user account.

Problem: Error: Unable to find an entry point when trying to process (TSYS)
Cause(s)/Solution(s):

- This error is because of a Windows incompatibility. The computer receiving this error was a Windows XP, which is not supported on the TSYS platform. Upgrade the operating system to at least Windows 10.

Problem: Error: EMV pad reset failed, transaction not complete, failed on com port access (VX805)
Cause(s)/Solution(s):

- A Windows update has caused the VX805 driver to drop. Reinstall the VX805 driver.

Problem: A transaction showing at the processor, but sale is not in The Edge
Cause(s)/Solution(s):

- The merchant should ring the sale “Offline” in The Edge to record the sale but not process the payment a secondary time.
- For VX805, commonly the driver must be reinstalled or the station workstation is looking at the wrong com port for the device. Com9 is the default. Re-install the driver.

Problem: A sale exists in The Edge, but is not showing with the processor

- Contact processor to be certain they are unaware of the funds.
- Void the sale and reenter ensuring the merchant does not choose “Process Offline.”

Problem: Socket errors

1. Reboot NETePay. (Go to NETePay and click File>Exit, then double click to restart.)
2. Browse to the server computer over the network (or computer that has NETePay) be sure you can access it without needing network credentials.
3. Make sure The Edge and NETePay connection is through FW and AV.
4. Reboot the computer.

Problem: Can’t process Amex

- Likely needs an update of the CC software (NETePay and DSI possibly).

- Must be on release version `DSIEMV` Version 5.06.10 or higher.
- Not licensed for CC processor, could that be an old license is installed; re-send and install newer license.

Problem: No connection to any server

- Again, make sure NETePay is up and running; if it is, reboot it.
- Access to the path needs permission to the folder location. The store needs to reach out to the CC processor.

Problem: PAX Troubleshooting

- If manually processing with a PAX, you must PRESS **OK** in The Edge and immediately start entering the card # directly on the device. You will time out if more than 60 seconds passes
- For any access denied error, make sure they have full permissions to The Edge folder and are signed in as an admin.

Problem: Not Licensed for Plugin

- License file is incorrect OR the wrong DLL has been selected

Problem: Connect Error

- Edge workstation is failing to communicate with the IP address of the PAX device. If persistent, Processor will set the merchant up for Static IP.
- DHCP support was added to the Edge in 17.1.

13.25.5 General Tips for Smooth Processing

- The processor server name should be device name rather than a static IP. If you use an IP address, make sure it is the correct server and make sure it is static.
- If something is wrong with connection between The Edge and the processor, the first step should be to check your Internet connection, then ping the server.
- The NETePay folder must have read/write permission for everyone. Processing permissions in The Edge will protect against unauthorized activity.
- NETePay should have firewall access.
- When looking for NETePay for the purposes of restarting it, look for the NETePay icon.
- To restart NETePay, minimizing the window is not sufficient. Open the application window and select **File ► Exit**.
- If you use multiple Windows logins to ring up credit card transactions, provide them to your processor.

13.26 Email Settings

In an effort to save paper, customers can opt to receive receipts by email. This option is known as Green Receipts. This document outlines the steps required to get you started with Green Receipts.

13.26.1 Green Receipt System Options

For green receipts to work, it must be configured in **System Options**. To do so:

1. Select **Administrative ► System Options** and scroll down to **Receipt Options**.
2. Set **Enable Emailing of Receipts** to `True`.
3. Select **OK**.

13.26.2 Configuring Email Settings for Email Receipts and Job Details Sheets

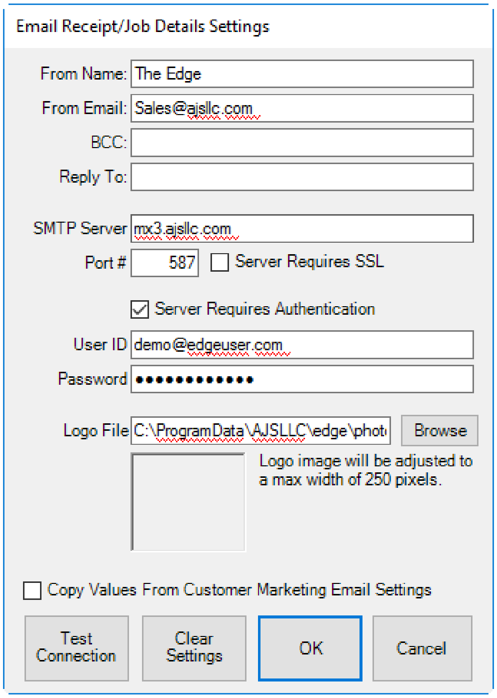
To send email receipts and job details sheets, The Edge must be configured to use the email settings associated with your store email account. The fields marked with an asterisk below are specific to your email account. You should contact your email vendor or ISP (Internet service provider) and ask them specifically for this information.

Some web-based email applications such as Yahoo mail, Hotmail, AOL mail may not work well from within The Edge.

If you complete the email settings for Customer Marketing first, you can copy those settings to this area.

The Edge email server must be configured to send messages. To do so:

1. Select **Administrative ► Email Settings ► Receipts/Job Details**. The **Email Receipt/Job Details Settings** window will appear.



Email Receipt/Job Details Settings

From Name: The Edge

From Email: Sales@ajsllc.com

BCC:

Reply To:

SMTP Server mx3.ajsllc.com

Port # 587 ☐ Server Requires SSL

☑ Server Requires Authentication

User ID demo@edgeuser.com

Password ●●●●●●●●●●●●

Logo File C:\ProgramData\AJSLLC\edge\phot

Logo image will be adjusted to a max width of 250 pixels.

☐ Copy Values From Customer Marketing Email Settings

Fields and options to complete in the **Email Receipt/Job Details Settings** window include:

From Name	The name that you want to appear as the sender of the receipt. This will probably be your store name. This also serves as the “reply to” email address.
From Email	The email address from which the receipt is being sent. This will be your store email account.
SMTP Server*	The outbound server as provided by your email provider. It will probably be an SMTP account.
Port #*	The port number with which your email interacts.
Server Requires SSL*	Whether the outgoing server requires a secure socket layer.
Server Requires Authentication*	Whether the outgoing server requires authentication.
User ID*	The email account’s user ID.
Password*	The password for the email account.
Logo File/Browse	Optionally you can supply a logo file (image) containing your store’s logo. If you do, the image will appear at the top of the email receipt

Copy Values from Customer Marketing Email Settings	Allows you to copy the settings you used in setting up customer marketing emails as discussed in the section entitled Configuring Email Settings for Customer Marketing.
Test Connection	Sends a ping though the system to make sure settings are correct.
Clear Settings	Allows you to clear email settings, which will effectively disable automated emails.

2. Complete these fields with user and server settings (SMTP) provided by your email provider.
3. Select **Test Connection** to have a test email sent to you to verify set up is correct.
4. Select **OK**.

13.26.3 Configuring Email Settings for Customer Marketing

You can use different email settings for different purposes. To configure email settings for customer mailings that are different from those of receipts or notifications, select **Administrative ► Email Settings ► Customer Marketing**. Complete the fields as described in the section entitled Configuring Email Settings for Email Receipts and Job Details Sheets.

13.26.4 Configuring Email Settings for Notifications

You can use different email settings for different purposes. To configure email settings for customer mailings that are different from those of receipts or notifications, select **Administrative ► Email Settings ► Notifications**. Complete the fields as described in the section entitled Configuring Email Settings for Email Receipts and Job Details Sheets.

13.26.5 Configuring Email Settings for Internal Notifications

You can use different email settings for different purposes. To configure email settings for internal communications that are different from those of receipts or notifications, select **Administrative ► Email Settings ► Internal**. Complete the fields as described in the section entitled Configuring Email Settings for Email Receipts and Job Details Sheets.

13.27 Log Off

Allows one user to log off the system, thereby removing his or her permissions, so the next user will only be permitted his or her own access.

When a user logs in, they have 5 minutes of idle time before they are automatically logged off. The clock in the lower left corner counts down this time. With each keystroke, the clock is reset to 5 minutes.

To abort the remaining time, use **Log Off**. For example, if you logged on and then must take a phone call and leave the workstation, use **Log Off** to ensure that no one performs tasks under your ID.

14 User Resources

You have questions? We have answers! You're always welcome to call for support, but to get the most from The Edge, take a look at the variety of user resources available from Abbott Jewelry Systems.

Associate and Management Training

With knowledge comes the ability to unleash the full potential of The Edge and your business. Take advantage of the variety of regional training classes, classroom work at our Shelton, Connecticut, headquarters, or the numerous webinars that you can take from anywhere. Visit www.theedgeforjewelers.com/calendar.

To find out how you can get free, unlimited training, contact service@ajsllc.com.

Help at Your Fingertips

The most convenient and all-encompassing reference tool is The Edge's On-Line Help System, which is built right into The Edge interface and available on-line. From there, you can browse a topic, search the index, or do a full key-word search. When working in The Edge, many screens contain a yellow Help button built right in; it will automatically open to the topic for that screen.

EdgeUser.com

At EdgeUser.com, you'll see:
- New user videos (good for a brush up, too!)
- Specific feature videos
- Tip sheets on getting the most from new and even not-so-new features
- An extra link to The Edge User Guide in PDF (which is also installed on your desktop)
- We also have a Downloads area where you can get the most recent Vendor Catalogs, ZIP Code files, and of course, the latest version of The Edge.

Specifically available on EdgeUser.com, following is a list of tip sheets and videos available to help you work with specific features of The Edge.

15 Glossary

Acronym	Term	Definition
AIMS	aged inventory management system	A process designed to take a proactive approach to aging inventory. The goal of AIMS is the reduction and elimination of old inventory. This is accomplished by using a tiered system of assigning spiff and price markdowns to items dynamically as they age.
	bulk master record	An inventory record that serves as the item record for all bulk items of that style number.
	bulk quantity record	Bulk quantity records are a subset of bulk master records, but are based on shipments. For example, if you receive 10 of a particular bulk item, a bulk quantity record is created.
	bulk instance record	Bulk instance records are created when a bulk item is sold or otherwise used individually. Creation of an instance record depletes the quantity record for that item.
	bulk pricing methods	• General Merchandise, UPC/SKU: Appropriate when an item is carried in quantity and carries the same cost and price each, e.g., charms, batteries, and bead lines. • Buy and Sell Item by Unit of Measure, IUOM: Appropriate when an item is carried in quantity that includes a physical count and a measure and sold per measure, e.g., melee diamond parcels. • Buy and Sell by Measure Only, UOM: Appropriate when an item is carried in measure and sold per measure, e.g., gold stock. • Mixed Retail Pricing, PRE: Appropriate when an item represents a group of like-items of differing costs and prices but consistent markup, e.g., watchbands.
COGS	cost of goods sold	The direct costs attributable to the production of the goods sold by a company. This amount includes the cost of the materials used in creating the good along with the direct labor costs used to produce the good. It excludes indirect expenses such as distribution costs and sales force costs.
	consignment	Items owned by a customer that reside at and are to be sold by the store, at which time the customer will receive payment. Also see memo items.
GROI	gross return on investment	An inventory profitability evaluation ratio that analyzes a firm's ability to turn inventory into cash above the cost of the inventory. It is calculated by dividing the gross margin by the average inventory cost and is used often in the retail industry.

	customer account types	**CH:** House Account **Reward Card:** Reward Card **L:** Layaway **R:** Repair **CR:** Store Credit.
	inventory types	**A:** Assembled **P:** Take-Off **U:** Custom **S:** Stock **M:** Memo **C:** Consignment **O:** Special Order **T:** Trade-In **B:** Built **E:** Template **V:** Virtual Model **I:** Internet Model approved **J:** Internet Model Browse not yet approved **F:** Faux Model **L:** Live Model
	item statuses	**I:** In stock **L:** On Layaway **S:** Sold **A:** Memo Out **V:** Returned to Vendor **M:** Missing **D:** Disassembled **U:** Consumed here (i.e. as a part) Consumed gone (no status letter, determined by sold or in stock) **X:** Scrapped **G:** Giveaway **N:** Donation **W:** Work in Progress **C:** Cancelled **E:** Template. Purchase Order Statuses: **Q:** Queued **E:** Entered **B:** Backordered **O:** On Order **C:** Cancelled.

IUOM	item unit of measure	Bulk item pricing method; see bulk pricing methods above.
	levels	In concert with Rapid Reorder, a designation of the minimum number of an item to be kept in stock at all times.
	memo item	Items owned by a vendor that reside at and are to be sold by the store, at which time the vendor will receive payment. Also see consignment.
PRE		Bulk pricing method; see bulk pricing above
	purchase order statuses	• **New** P/O line added, not saved or ordered. • **Entered** P/O line added and saved, but not ordered. • **Ordered** P/O line entered and ordered. • **Received** Full quantity for this P/O line received to inventory • **Canceled** Order has been canceled • **Back Order** Items ordered but unavailable for shipping.
	reprice/re-cost	The repricing feature allows you to change the price of an item or several items. Re-cost allows you to change and track replacement cost of an item.
RFID	radio frequency identification	A technology that allows reading of tags by radio frequency. The tag contains a chip which the wand can interact with. They do not require line-of-sight with text or a barcode.
	server	A computer that may or may not serve as a workstation, but in any case, houses the databases.
	special order status	• **Need More Info** • **Need to Order** • **Waiting on Vendor** • **All Here** • **Part Here** • **Complete or Canceled.**
TROI	true return on investment	The return on investment taking account how long the item has been in inventory.
UOM	unit of measure	Bulk pricing method; see bulk pricing above
UPC/SKU	universal product code/stock keeping unit	Bulk pricing method; see bulk pricing above
WIP	work in progress	A build or assembly that has been initiated but has never added a SKU and does not have a completed task.
	work station	A computer running The Edge that does not house the databases.

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