



Adjust a Repair or Custom Job

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. Perhaps a customer decides on 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. Perhaps a customer is dissatisfied with work performed and you decide to refund them the money paid. This could be done as an adjustment in a similar to performing a return of merchandise.

NOTE!

Adjustments made to repair or custom jobs do not render the job as OPEN.

The following steps will guide you through a simple adjustment to refund money to a customer.

1. From **POS**, locate the customer record.
2. Select **Return/Adjust**. A list of the customer's activities will appear.

Return / Adjust

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	Desc
2/27/2013	Inventory	001-200-00003	\$3,000.00	Testing 1,2,3 to be traded for
2/25/2013	Repair	001-00006-001	\$230.00	Pickup Repair #001-00006-001 ordered on 2/25/2013: Test Repair. Declared value: \$500.00. Tasks:Test T
1/21/2013	Inventory	001-300-00001	\$1,500.00	Test of a 500 item with cost change
1/18/2013	Inventory	001-200-00001	\$2,500.00	This is the first item in the database

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 POS screen will open the repair record.

Adjust Repair #001-00006-001

Describe the Item to be Repaired

Item Description: (for customer receipt)
14k Gents Wedding Band

Adjustment Reason: [Dropdown] Image...

Adjustment Description: [Text Area]

Private Notes: [Text Area] Condition Notes: [Text Area]

who: [Dropdown] Show All Associates

Tasks Parts History

Describe the Tasks to be Performed

Step	SKU	Description / Details	Parts Labor Other Price	Tx
>1		Size Ring Up one size to 11	\$100.00	<input checked="" type="checkbox"/>
		[Enter optional private notes about the task]	\$30.00	<input type="checkbox"/>
		Completed 2/25/2013 11:31:02 AM	\$130.00	<input type="checkbox"/>

who: [Dropdown]

Move Task Up Add Task Task Details Set All to Zero

Move Task Down Cancel / uncancel Task

Done 2/25/2013 11:31:02 AM Picked up 2/25/2013 11:31:37 AM

Subtotal	\$130.00
Tax	\$6.35
Total	\$136.35
Original Total	\$136.35
Adjustment Total	\$0.00

Revert OK / Save and Close Cancel

- 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**.

Tips and Notes:

- All adjusted fields 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 screen.
- If the job was previously adjusted, "previously adjusted by (assoc) and date" will appear in red
- Original total and adjustment total will appear on the screen
- Any money due back to or from the customer will be tendered at the POS screen after saving the adjustment.

Adjust Repair #001-00006-001

Describe the Item to be Repaired
 Item Description: (for customer receipt)
 14k Gents Wedding Band

Adjustment Reason: Price adjustment
 Adjustment Description: Decided no charge

Private Notes: [Enter optional private notes]
 Condition Notes: [Enter notes about the condition of the item to be repaired]

who: [dropdown] Show All Associates

Tasks | Parts | History

Describe the Tasks to be Performed

Step	SKU	Description / Details	Parts Labor Other Price	Tx
>1		Size Ring Up one size to 11	\$0.00	<input checked="" type="checkbox"/>
Find SKU		[Enter optional private notes about the task]	\$0.00	<input type="checkbox"/>
		Completed 2/25/2013 11:31:02 AM	\$0.00	<input type="checkbox"/>

who: [dropdown]

Move Task Up | Add Task | Task Details | Set All to Zero
 Move Task Down | Cancel / uncancel Task

Done: 2/25/2013 11:31:02 AM
 Picked up: 2/25/2013 11:31:37 AM

Subtotal: \$0.00
 Tax: \$0.00
 Total: \$0.00
 Original Total: \$136.35
 Adjustment Total: (\$136.35)

Revert | OK / Save and Close | Cancel

5. Select a reason for the adjustment from the **Adjustment Reason** drop-down menu. This is required.

NOTE!

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.

Adjustment Reason: [dropdown]
 Adjustment Description: [text area]

NOTE!

This text from both the **Adjustment Reason** field and **Adjustment Description** field will appear on the customer's receipt.

TIP!

All adjustments are logged with brief description, date, and associate on the history tab.

Adjust Repair #001-00006-001

Describe the Item to be Repaired
Item Description: (for customer receipt)
14k Gents Wedding Band

Adjustment Reason
Adjustment Description

Image...

Private Notes:
[Enter optional private notes]

Condition Notes:
[Enter notes about the condition of the item to be repaired]

who

Show All Associates

Tasks Parts History

Date	Who	Notes
2/25/2013 11:10 AM	#1: Carrano, Joe	Intake Price:none>>\$30.00 ETA:none>>2/27/2013
2/25/2013 11:10 AM	#1: Carrano, Joe	Edit Task #001-00006-001-001 Price:\$30.00>>\$130.00
2/25/2013 11:11 AM	#1: Carrano, Joe	Edit Price:\$30.00>>\$130.00
3/26/2013 11:39 AM	#1: Carrano, Joe	Adjustment to Price and Taxes. Reason: Price adjustment Notes: Decided no charge Task #001-00006-001-001 Price:\$130.00>>\$130.00

Add Note Edit Note Hide / unHide Note Show Hidden

Revert OK / Save and Close Cancel

7. Select **OK/SAVE and Close** to return to POS where you can finish the transaction.

Other Notes /Tips

The repair filter has a new set of fields to query for **Adjustments** and **Adjustment Date**. This filter only applies to picked up jobs as you can only adjust a picked up job at POS. The filter options allows you to search as follows:

- Don't care about adjustments – search with no regard of adjustments
- Exclude adjustments – exclude adjusted repair jobs
- Only adjustments – find only adjusted jobs
- Positive adjustments – find only adjustments where more was charged
- Negative adjustments – find only adjustments where money was returned.

Repair/Custom Job adjustments have been added to the Refunds report under Reports=> Activity=> Refunds.

Repair/Custom Job adjustments have been added as appropriate to all Activity Reports in The Edge.

Adjustments Report is a new report was added to the Repair/Custom report set; it details or summarizes all adjustments. The report can be filtered just like all repair reports including the new Adjustments filter (see above).