New User Checklist

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Introduction

Welcome to The Edge! The following checklist outlines steps required to become operational with The Edge software. Whether you are starting new or converting from a previous software system, you should complete this checklist to fully prepare yourself to start using The Edge on a daily basis.

Be aware that this is a checklist; it is not intended to instruct you in how to perform each of the tasks listed. Each of these tasks has detailed a section in The Edge User Guide. Also, please contact the support department if you have any questions or need guidance. We ask that you communicate with us as needed to continue making forward progress in getting these steps done.

TIP!

Pressing F1 while working in a specific area of The Edge will bring up Help on that topic.

The Edge Technical Support: Phone: 877-844-0002
Fax: 203-926-1643
Email: support@ajsllc.com

Hardware and Software Setup

- ☐ Complete software/network installation on all PCs. If more than one PC, they should be networked by your local computer technician.
- ☐ Install The Edge on all PCs and configure server/workstations.
- ☐ Complete all peripheral hardware installations.
- ☐ Test all hardware with the program to ensure proper setup and function.

NOTE!

If you ordered peripheral hardware from us (scanner, tag printer, camera, or cash drawer) and have not received them, contact sales@ajsllc.com.

Edge Administrative Menu

Associate Setup

Administrative ► Associates

- ☐ Add all associates; each associate must be assigned an ID (number) and password.
- ☐ Visit the **Commission** tab and choose a type of commission, even if you do not pay it. You must also enter a commission percentage; zero percent is acceptable.
- ☐ Visit the **Security** tab to setup what functions this associate is permitted to do. The owner of the store should be setup to do every function; you can check all by right clicking in the list and selecting **Check All**. Even with no security settings checked, an associate can still make a basic sale.

NOTE!

There is no need to labor over this section. It can be modified in the future as you determine responsibilities of your staff.

Sales Tax Setup

Administrative ► Sales Tax ► Tax Definitions

Add any applicable sales tax(es). When adding a tax, it will ask you to give it an ID (an internal Edge reference/field name) and description (how it will appear on receipts and reports). The following applies in most cases.

- ☐ Enter your tax rate as a number (e.g., 6 and ½ percent as 6.5). The Edge will convert it to a percentage automatically.
- ☐ Set your rounding to .005; this instructs The Edge when to round up when dealing with calculated cents change.
- ☐ Set Qualifying Customers to **Shipping to (or walk into store located in)**, then enter your state code. This ensures that tax is NOT charged when shipping out of state.
- ☐ Visit the **Categories** tab and check all taxable categories. (Check **ALL**.)
- ☐ Visit the **Stores** tab and check **Store** (The Edge allows multiple tax rates for locations under different jurisdictions.)
- ☐ Visit the **MISC** tab and apply a checkmark to taxable transactions types.
- ☐ Visit the **Other** tab and check any taxable services.

Repair SKUs

Administrative ► Repair ► Repair SKUs/Import SKU Table

- ☐ If you have purchased the Geller SKU table, import them. If you already own the book, you can contact Jeweler Profit to purchase the SKU table import for The Edge. They can be reached by email at dgeller@bellsouth.net or by phone at (404) 255-9565.

- ☐ Optionally, add your own custom repair SKUs. Repair SKUs offer a way to predefine repair tasks, but are not necessary to process repairs. You can always skip the SKU field on a repair intake and manually type in the task and cost/price amounts. Custom repair SKUs are an advanced administrative task and not recommended for everyone when they are first starting.

System Options

Administrative ► System Options

- ☐ Modify system options to match your store’s policies. You can highlight a system option to see a short description that will appear on the bottom of the window defining what this option controls. There is no need to labor over this section for now; these settings are available and control many of the behaviors in the program.

Other Administrative Items

Promotions/Why-in

- ☐ This defines the **Why-In** option list at POS. It is used to track why a customer has come into your store to use in reporting the effectiveness of ads, promotions, etc.

Misc. Sale Lines

- ☐ This defines miscellaneous line entries available at POS. Miscellaneous charges can reflect a wide variety of possibilities such as selling non-inventoried items (debit) or discount coupons toward a sale (credit).

Lists

- ☐ This works in conjunction with your **Categories**. It allows further definition of category details such as metal finishes, color, type, size, etc.

Category Maintenance

Inventory ► Category ► List

Review the entire category list carefully. This is an area you want to spend sufficient time now because it is the organizational basis of your inventory setup for your store.

- Remove unwanted categories by highlighting that line and selecting **Delete**. The category must be emptied of items to be deleted. If you are unsure if it is needed, mark the category **Inactive**.
- Add categories that are needed but do not currently exist. Categories should be broadly defined by the type of inventory they will contain. For example, if you carry watches from multiple vendors, do not create a separate category for each vendor. Instead, create a single category titled Watches or perhaps two categories titled Men’s Watches and Lady’s Watches. The watch vendor or manufacturer is a selectable field within the category. Modify each category on file; there are five tabs for each category. Press F1 (Help) for detailed information on each.
- **General** tab – Describe the category by name, type, and general description (used by The Edge to suggest descriptions for adding items to this category).
- **Pricing** tab – Controls how The Edge marks up new inventory or marks down old inventory at an age you determine. These price points are also used by the performance reports to analyze your available merchandise.
- **Details** tab – Sets up detail fields to better describe the item that will reside in these categories. Each detail can be linked to a list of choices and can be printed on tags.

NOTE!

Standards like vendor style, date entered, cost, price, and case location already appear on every item by default. It is not necessary to make categories based on these characteristics.

- **Tags** tab – Sets up the tag layout for this category.
- **Taxes** tab – Select the taxes applicable to this category.

NOTE!

Use Copy From on each tab respectively to copy any pricing, detail, or tag layout from one category to another (this will save data entry tasks).

Inventory Management

Inventory ► Items ► Find/Add

- ☐ Add all items into inventory. If they were converted from previous software, you should verify that inventory in The Edge reflects that from your previous software.
- ☐ Print tags. Tags can be printed individually or in batches. From the item record, select the **Tags** tab and print. To print in batches, select **Inventory ► Print Tags**.
- ☐ Complete a physical inventory. Press F1 and search for Physical Inventory.

NOTE!

Once you have finished entering your inventory or when you start with converted inventory from a file, this is a crucial step. It ensures that what is in The Edge matches what is in your store.

Edge Customer Balance Maintenance

Customer balances and pending transactions such as layaways, repairs, custom jobs, special orders, and appraisals must be entered into The Edge.

Statement Balances

Previous customer balances, both credits and debits, must be entered into The Edge manually.

Customer ► Find

- ☐ You must set starting balances for applicable customers:
  1. To obtain figures to be entered, pull a balance report from your old system.
  2. Find the customer using **Customer Find**.
  3. Select the **Balances** tab.
  4. Select **Credit Memo** and adjust the balance by typing the balance in the **New Balance** field.
  5. Select **House Account** and adjust the balance by typing the balance in the **New Balance** Field (money owed to the store entered as a POSITIVE value).
  6. Be sure to enter deposits made as a POS transaction.

The Edge adjustment feature will allow these transactions to reflect a prior date and reason, so as not to affect current business and accounting totals. When doing a balance adjustment, be sure to back date the adjustment and record a reason (i.e., conversion). Leaving the default date will flag the transaction as if it happened that day. This is especially important if your intent is to print statements and calculate interest and aging for these adjusted balances.

Entering Service Records

For most service records such as repairs, custom jobs, special orders, and appraisals:

1. Pull a record of such transactions from your old system.
2. At The Edge POS window, pull up the customer record for each transaction.
3. Specify a deposit equal to all funds collected for this service so far. These payments can also be backdated if needed.
4. Select a payment method and complete the sale.

Layaways are slightly different because you can't enter them without an item number. Make sure the item is tagged as part of inventory. For layaways:

1. Ensure the item is in inventory or add it if necessary.
2. Locate the customer and scan or find the item to sell.
3. Select **Layaway** as the tender method.
4. Specify a deposit equal to all funds collected for this layaway so far. These payments can also be backdated if needed.
5. Select a payment method and complete the sale.

If you're a converted store and sales data was converted, your pending layaways may have converted as completed sales. This must be corrected manually.

1. Find the transaction.
2. Select **Supervisor ► Void**. This will delete the old record so you can create a fresh, correct record as described above.

These are best practices. Manually re-entering these transactions is for reference and easy transition into The Edge.

See the section in the User Guide entitled Working with Point of Sale Transactions for more about working with these transactions.

Balances and Pending Services Records After a Conversion

If you had a conversion, it is quite common for some customer balances to be incomplete. This is because not all kinds of data are converted from all other systems into The Edge. We strongly recommend that you take a complete balance report from your old system just prior to conversion, and from The Edge right after conversion, and identify which balances need to be adjusted.

For converted pending service and layaway transactions, it is possible for a discrepancy to arise because the conversion process cannot always tell deposits from payments in full. Sometimes pending transactions are seen as complete; they should be voided and re-entered.