Conversion Standards

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Conversion Standards

Customers

A customer conversion includes name, addresses (home, office, vacation, etc.), phone numbers, email addresses, spouse, birthdays, anniversary, and notes.

NOTE!

Eight user-defined fields may be used to contain some of your special mailing flags or information. You must alert and identify these to us.

Inventory

All in-stock inventory will be converted into appropriate Edge categories. If available and if the stone data resides in identifiable fields, stone information will be converted as a part of the process. A minimum of stone type, count, and shape is needed to satisfy The Edge requirements; however, fields for all stone information required right up to the certification are provided.

Review Edge default category mapping by downloading the category spreadsheet here:
Edge Categories

Sales History

All inventory, sold and in-stock, will be converted. We will link customers to the products they purchased from sales records produced by your current system. When finished, these records will look like they were created in The Edge.

All systems track repairs, special orders, appraisals, open layaways, and the balances on these transactions differently from the way in which The Edge does. It would be impractical to attempt to convert these records as if they were entered in The Edge natively. See the appropriate section below for more detail.

Sales history should be relied on for historical reference. Financials such as accounting, sales tax reporting, and commissions should be concluded using original software.

The next few pages will detail some of the fields referenced above.

Customer Conversions

The following fields will be populated during customer conversions, source data permitting.

Primary
- Gender
- Title
- First Name
- Middle
- Last Name
- Suffix
- License Number
- Employer
- Birthday

Spouse/Partner Gender
- Gender
- Title
- First Name
- Middle
- Last Name
- Suffix
- License Number
- Employer
- Birthday

Addresses
- Home (street, city, st, zip)
- Work
- Vacation

Phones
- Home
- Work
- Cell

Email Addresses
- Home
- Work

Date Entered

Date Created

Anniversary

Notes

Inventory Conversions

The following fields will be populated, source data permitting, during the inventory conversion. Some new data, such as category and stock number, will be generated during the conversion. Some data may require us to agree on a default value if the field is required for entry in The Edge. For example, The Edge requires an Entered Date on all inventory items. If your present data doesn't keep date entered, depending on which software you are converting from we will use -365 days or the first day of the calendar year or 1/1 of the current year.

Data Elements

- *Category ID
- *Item Number
- *Old Stock #
- *Vendor ID
- *Invoice Number
- *Vendor Style
- *Stock Type
- *Store Number (for multi-store clients)
- *Status (in stock, sold, on layaway, consignment, memo)
- *Date Entered
- *Description
- *Cost

*Required fields

- *Retail Price
- *Current Price (if not used in current system we'll set to retail)
- *Lowest Price (lowest price to an sell item for- may not be used)
- Image (if you have images- we will pull a copy of the images.txt to convert)
- Notes
- Metal
- Type
- Metal Color
- Style of Item
- Size or Length

Stone Fields

We will convert individual stone information if these records are stored in identifiable fields consistently. We cannot responsibly convert stones by parsing descriptions.

The Edge requires a minimum of stone type, shape, and count for each stone record. If this minimum is not met, the stone record will not be converted. Be prepared to assist us in identifying stone abbreviations known in your current data. Typical Stone Fields are: Type/Count/Weight & Size/Shape/Clarity/ Color/Make/Cost&CT/Cut.

Available Catalogs/Bulk Inventory

We offer supplier catalog downloads such as: Pandora, Lafonn, INOX Men's, Chic Pistachio. A full list of available vendor catalogs can be found on The Edge newsfeed under "Catalog Update". If you carry one or more of these lines, or a similar line, you will need to specify the name of the line, vendor name, and where in your system these items reside. This will help us to convert these items and ensure they are marked as bulk inventory to categorize appropriately.

Sales History Conversions

Purchase History

Purchase history will link sold items to the customers who bought them using the sales records from your current system. The result will look as though the sales were made through The Edge. You can use the mailing features, analytical reports, and operational reports from these records as if they were created in The Edge.

Service Records

We will attempt to convert service records such as repairs, appraisals, special orders, and custom jobs whenever possible. These jobs will not convert as if they were entered as native service records in The Edge, but instead will convert as completed miscellaneous sales transactions.

NOTE!
Pending jobs, if converted, will appear as completed sales. These jobs must be voided and reentered into The Edge as new.

The Edge POS screen contains a "Back-Date" feature to make these transactions historically accurate. Payments to date should be applied to establish an accurate outstanding balance on the individual repair record.

Layaway History

Pending layaways, if converted, are converted as finished sales. These transactions should be voided and reentered as pending.

The Edge POS screen contains a "Back-Date" feature to make these transactions historically accurate. Payments to date should be applied to establish an accurate account balance on the individual record.

Customer Balances

We do not convert store credits, gift certificates, or in-store charge balances. These balances must be established for each customer as soon as possible after the final conversion is completed. Run the appropriate reports from your existing system for use in The Edge adjustment feature. In The Edge, select **Customers>Find**, locate the customer, and select **Edit**. Then look for the **Balances** tab, in which adjustments can be made.

NOTE!
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.

EXPECTATIONS – IMPORTANT! PLEASE READ

For Customer Contact & Inventory Analysis

Sales history conversions enable you to use the powerful marketing and analytical features in The Edge as though the data originated in The Edge. The source data must contain these essential data elements for in order for a complete set of data.

For Sales Tax

Do not rely on converted sales history to report and pay sales tax for past periods. This is important! Finalize your sales tax for a past period on your previous system. You can rely on The Edge for tax purposes going forward from the conversion date.

For Sales Commission

Converted sales history may not include commission data at all. It is important to complete historical sales commissions using the prior method of calculation.

QuickBooks Integration

The Edge integrates with QB Pro for accounting purposes. If you plan to integrate, understand that historical/converted data should not be posted to QB. Instead plan the QB integration once the post conversion cleanup is completed, and all your staff is proficient with The Edge's daily operations. Then use a QB Start date that includes transactions entered directly into The Edge.

For Payment Types

It is not always possible to capture payment type from the sales records during conversion. We will make every attempt to capture payment type when it is part of the sales transaction but in those instances where it is not we will default to CASH. If you know that the payment type is captured when it is not obvious to us, please let us know where it can be found.