



# Collections

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## Introduction

The Edge Collections feature allows you to group items as part of a 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 POS can be set to prompt the salesperson to offer additional pieces in the collection. An item can belong to more than one collection.

One use for the Collections feature is to help identify items that were presented together as part of a sale flier or catalog. Another use might be to offer items from a vendor that were designed to coordinate with each other, such as a necklace and earring set.

## System Options

The only **System Option** needed for the Collections feature is in **POS Options, Show Collection Pop-Up**. If it is set to **True**, when an item that is part of a collection is scanned or entered at POS, a pop-up will appear offering other items in the collection. The inventory functions for grouping items into collections are enabled at all times and can be used regardless of whether you use the **Show Collection Pop-Up** option for suggestive selling.

## Creating Collections

To create a new collection:

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

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

<b>Collection Name</b>	The name for the collection.
<b>Collection Sub Name</b>	The name for a sub-collection, if desired.
<b>Start Date</b>	The date the items in the collection will begin to pop-up at POS. If this is left blank, the collection will start immediately.

<b>End Date</b>	The date the items in the collection will cease to pop-up at POS. If this is left blank, the collection will continue indefinitely.
<b>Add To Collection</b>	Used to add an item to the collection.
<b>Remove</b>	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 in the collection. 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.

**TIP!**

**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 POS, provided **System Options** are set accordingly.

## 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.

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

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

**Style** Returns collections that contain this style number.

**Collection** Returns collections with matching name or sub name.

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:

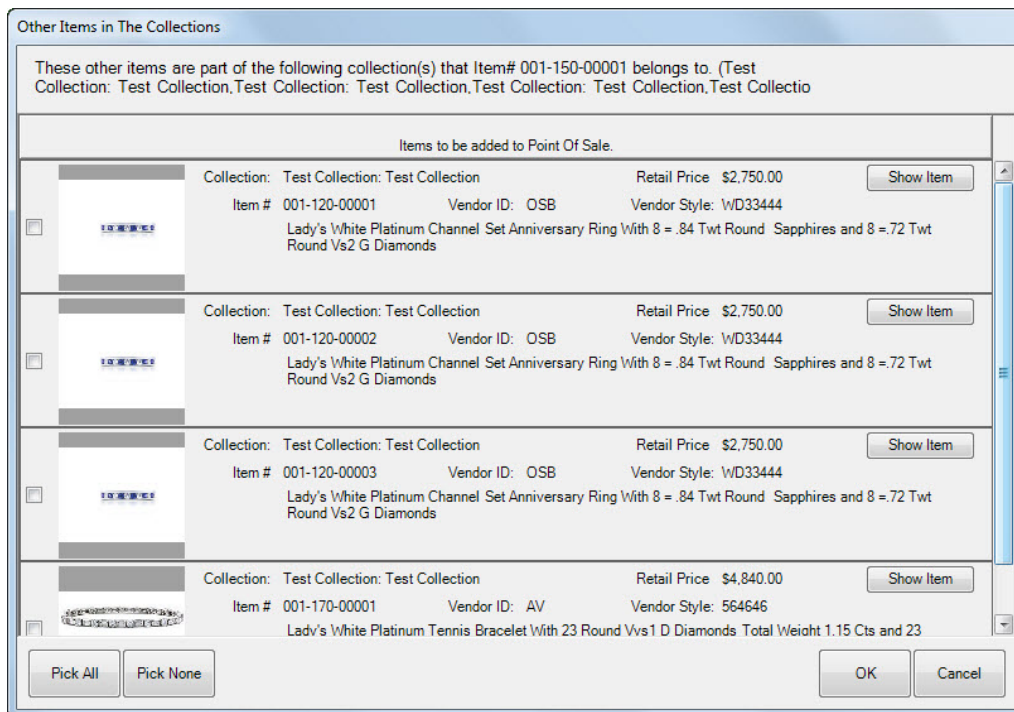
1. From the results provided by the **Collection Find** function, select a collection record and double click it or select **Edit**. The **Collection** screen will open; it will contain the same fields as described in the section entitled Creating Collections.

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

## Suggesting from Collections

Collections allow you to do some suggestive selling based on items created as a collection. To work with collection pop-ups:

1. If an item from a collection is sold at POS, a window will appear suggesting other items from the collection.



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.

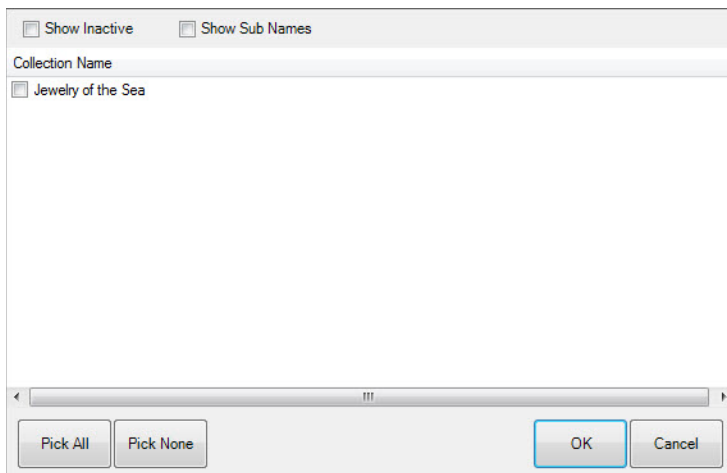
### TIP!

If a customer expresses interest in an item from the collection but does not plan to purchase it right away, you can save it in their Wish List.

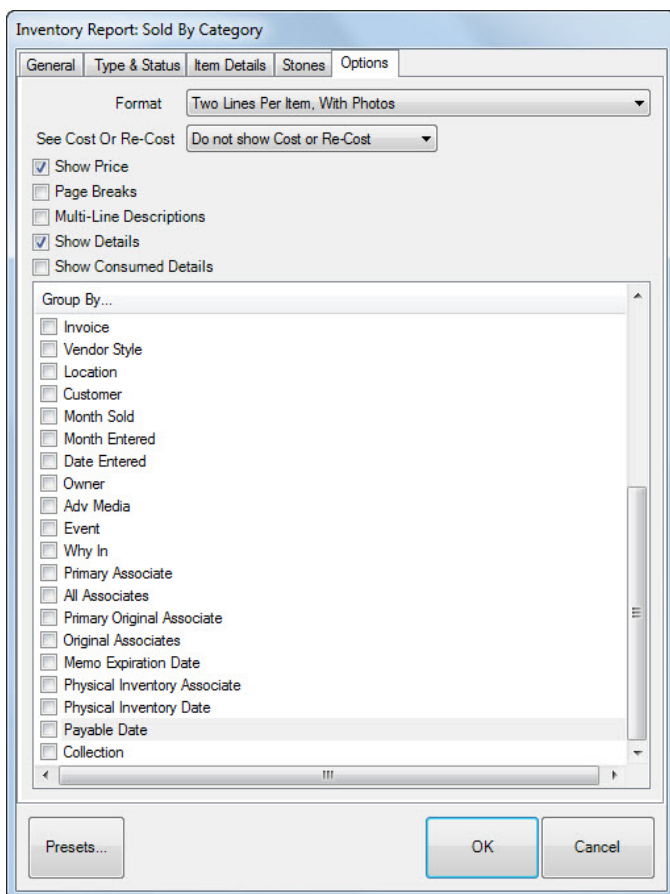
## Reporting

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. To run a report with collections in mind:

1. Select the inventory report you wish to run. The **Item Find** filter will appear.
2. From the **General** tab of the filter, select the **Collections** drop-down menu. You will be prompted to select the collection or collections you wish to work with.



3. Select the collections and select **OK**.
4. In some reports, you can group by collections; use the **Options** tab and check **Collections**.



5. Select report options as required.
6. Select **OK**. The report will run as usual.

**TIP!**

**If you use collections as a means to display product for marketing purposes, running sold items coupled with the collection filter will allow you to analyze how well that collection performed.**