Locations and Move

Table of Contents

Introduction

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 or the move feature as described in the section entitled Moving Inventory between Locations.

NOTE!

If you're working with locations for the first time in The Edge v. 6.1, 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. If a location is not appearing in the Locations drop-down menu, change the location record as described below in Finding a Location.

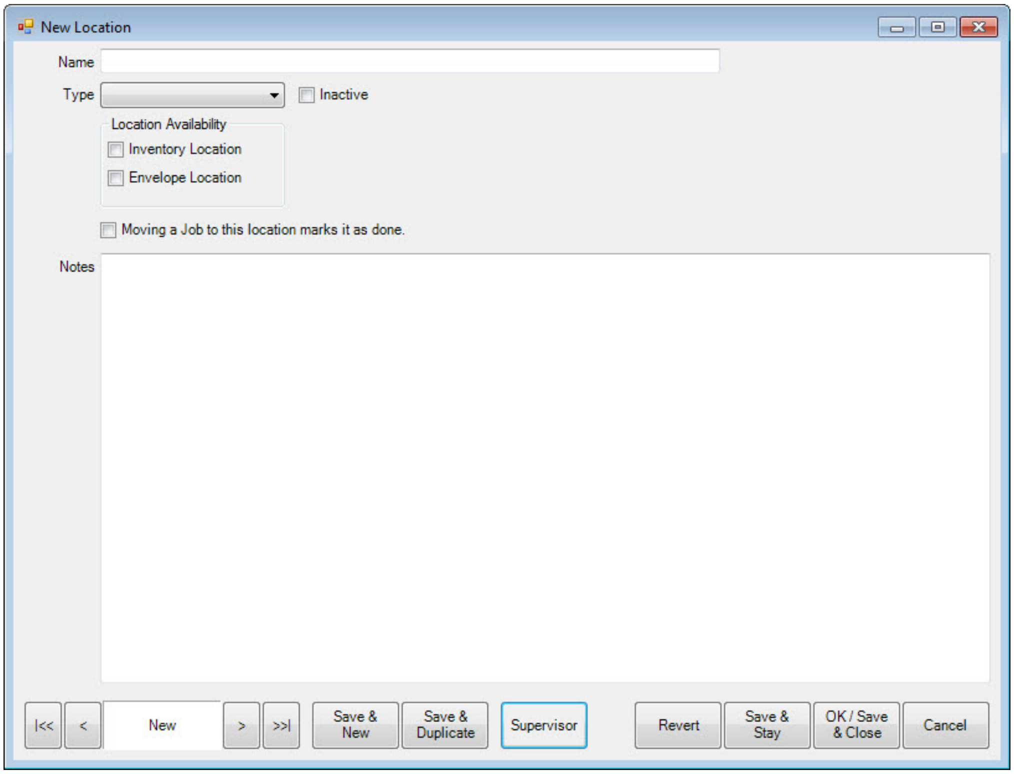
MULTI-STORE NOTE!

If The Edge determined that a location of the same name appears in more than one store, The Edge will append the name with the store number in parentheses.

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** screen will appear.



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

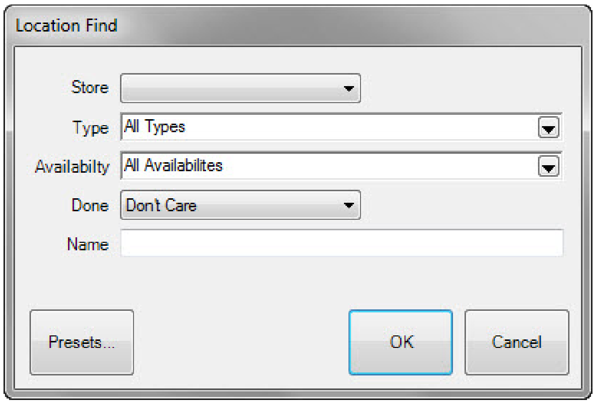
Name	The name of the location.
Type	The type of location: • **Back Stock** • **Bin** • **On Display** • **Outside Vendor** • **Station**.
Inactive	Whether the location is active and available for use.
Location Availability	What kind of availability the location has: • **Inventory Location** • **Envelope 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** screen as needed.
3. Select a save option. The location will appear in the **Location** drop-down menu.

Finding a Location

To work with existing location records:

1. Select **Administrative** ► **Locations** ► **Location Find**. The **Location Find** screen will appear.



Filters in the **Location Find** screen 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:

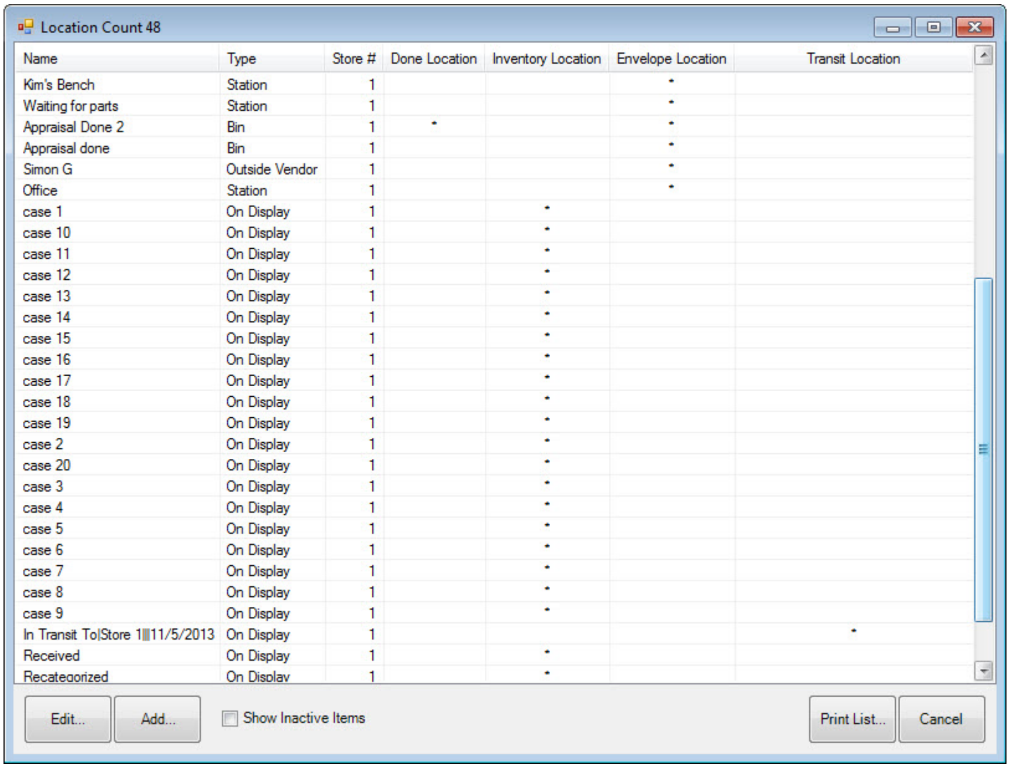
- **Envelope**
- **Transit**
- **Inventory.**

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		*		

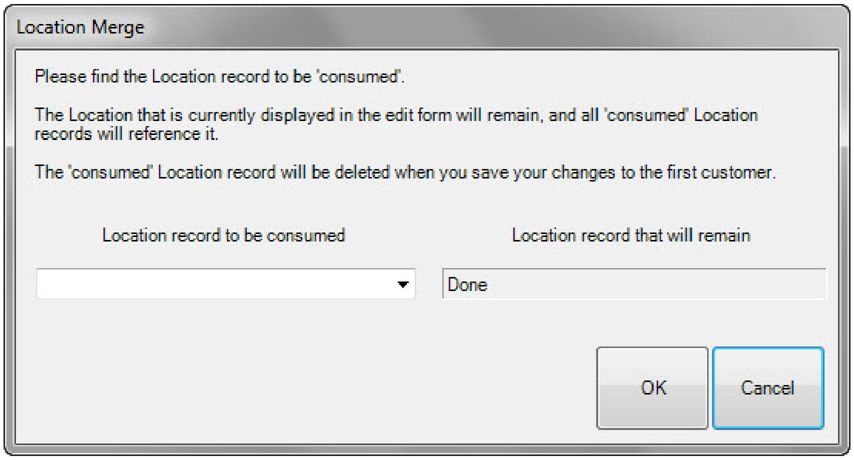
In these results, notice that the location's status as to done and its availability is marked with an asterisk.

4. Select a location record and edit it as necessary.

Merge Locations

Found in the **Supervisor** menu of the **Location** screen, **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** screen will appear.

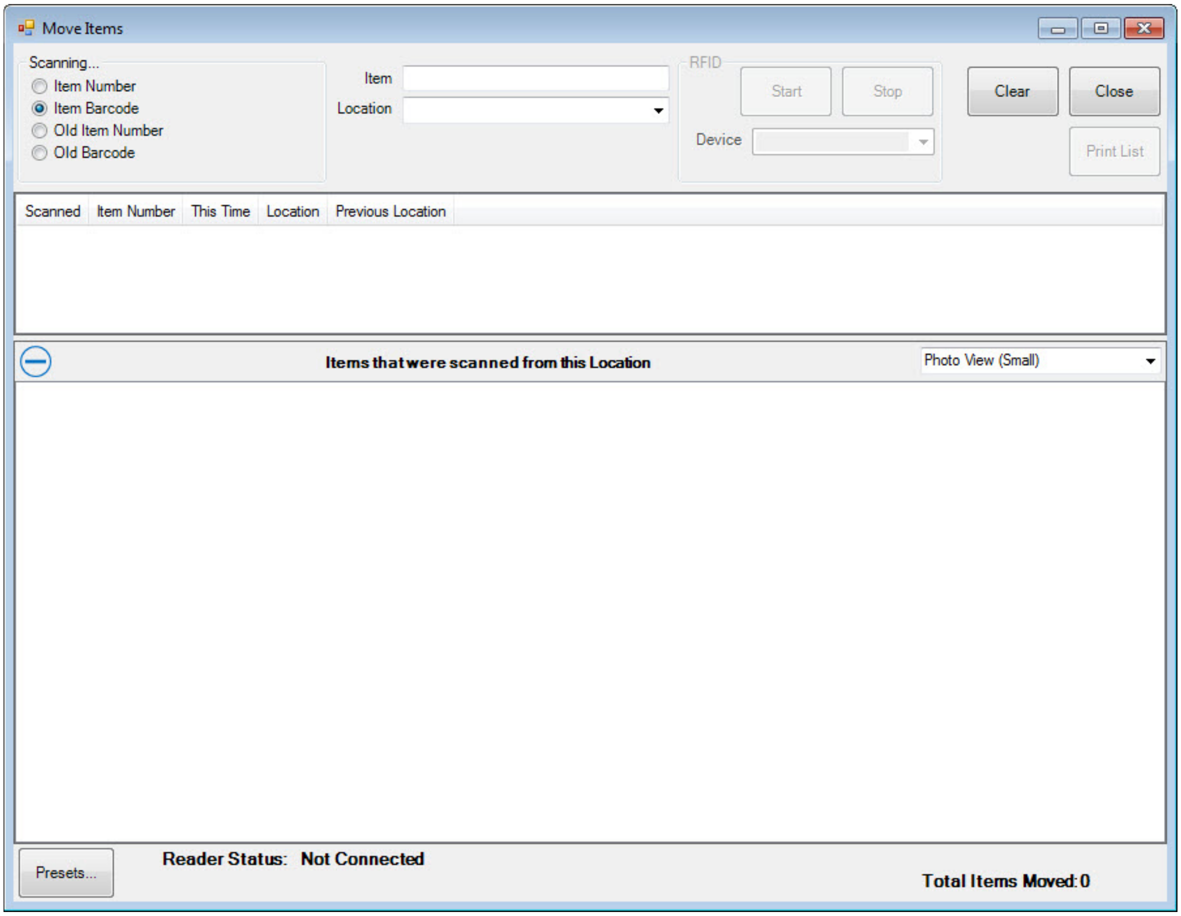


2. On the left, select the location to be merged from the **Location record to be consumed** drop-down menu. You can select more than one location.
3. On the right, the location from which you used the function will be listed in the **Location record that will remain** field. This is the destination location.
4. Select **OK**. The **Location** screen will return, showing the locations that are to be absorbed.
5. To complete the merge, from the **Location** screen, select a **Save** option.

Moving Inventory between 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** screen will appear.



The **Move Items** screen 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** screen 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 Adding a Location.
Clear	Clears the screen. This does not clear the move activity, it just refreshes the screen.
Close	Items are saved as you scan. This closes the **Move Item** screen.
Print List	Prints a hard copy list of the inventory. You will be prompted to indicate which portion of the screen 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** screen 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.

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.