



# Jewelry Care Plans: Jewelers Mutual

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## Introduction

Along with Jewelers Mutual Insurance Corporation (JMIC), The Edge has integrated jewelry care programs for you to offer your customers at point of sale. The true beauty of these programs is that there is no up-front cost to you.

## Program Coverage

Programs are offered by type of merchandise: jewelry and watches. Note that The Edge offers associated plans based on the item's category. See the section entitled Care Plan Category Options. For more about working with categories, see the section in The Edge User Guide entitled Categories (<http://docs.edgeuser.com/NetHelp/Documents/categories.htm>).

Coverage may include services such as those described in the sections that follow.

## Jewelry Care

- Accent stones lost because of defective mounting\*
- Pearl restringing
- Soldering
- Shank repair
- Prong Retipping
- Clasp & chain repair
- Earring back replacement
- One re-sizing
- Rhodium replating
- Protects against kinks or knots, dents, chips, breaks, cracks, thinning ring bands, gouges and scratches.

\* Center stones are covered under Lifetime coverage.

## Watch Care

- Movement repair
- Crystal repair/replacement
- Crown repair
- Stem replacement
- Water damage
- One strap replacement per calendar year
- One-time refurbishment for case, bracelet, or clasp
- Protects against mechanical failure and covered refurbishment of watches.

## Program Terms

Currently, JMIC offers a 3-year plan and a lifetime plan. You will have the option to choose between the two plans at POS.

## Licensing

Here's how to get started:

1. Contact The Edge Customer Service team at [service@ajsllc.com](mailto:service@ajsllc.com).
2. You'll be licensed by one of The Edge's care plan partners, in this case, JMIC.
3. Your Edge license will be updated to show your enrollment and the programs you wish to offer your customers. Care plans are tied to the store license, but there is a flag at the account level.
4. After you have set up your account with the care plan partner, The Edge Customer Service team will update your license and send it to you. Install your license and reboot The Edge.

It is through the license information that JMIC will bill you for the cost of the plans.

## Partner Contact Information

JMIC will provide you with access to a portal where you can view activity and make claims for repair reimbursement.

## Setting Up the Care Program

After your license is set up, follow the steps below to set up your care program.

## System Options

Product care System Options are found in **Administrative ► System Options ► Care Program**.

<b>Can Discount Care Plans</b>	Whether care plan fees can be discounted at POS. Options are: <i>Requires Override</i> : Requires an override to allow the discount. <i>Permission Check Only</i> : The Edge will check to see if the associate has permission to do this. <i>No Discounting</i> : No discounting will be allowed by anyone. <i>No Permission Checks</i> : Allows complete discounting without any checks.
<b>Care Plan Max Return Period</b>	The number of days that can pass before a care plan can no longer be returned. Check with your care plan provider for this information. Also, state laws may affect this setting.
<b>Care Plan POS Reminder</b>	Text to appear in a reminder to your associates to ask the customer about a care plan. The default is <i>Did you talk to the customer about our Jewelry Care Program?</i> If you don't wish to have a reminder pop up, then leave this field blank.
<b>Require Email Address when Entering a New Customer</b>	If using a care program, we recommend this be set to <i>True</i> .

## Associate Commissions

In the **Commission** tab of associate records, there is an option to set commission rates for care plan sales. To work with these commissions:

1. Go to **Administrative ► Associates**.
2. Open the associate with which you wish to work and select the **Commission** tab.
3. From the **Commission on Care Plans** area, select the type of commission to enable.

4. Select either % of Price, which gives commission as a percentage of the price of the plan or Flat Rate, which gives a specified amount.
5. For % of Price, set the percentage to give.
6. For Flat Rate, set the dollar amount.
7. Select a **Save** option.

Provided the **Commission on Care Plans** field is not left blank, these values will appear in the **Commissions** report as well as **Activity** reports.

## Security Options

There are three options related to care plans in associate records under the **Security** tab:

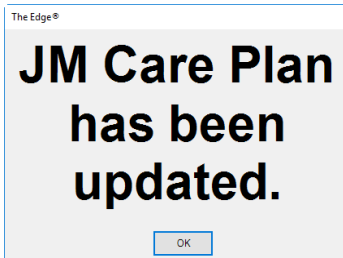
- Administer Care Plans
- Discount Care Plans at POS
- Run JM Care Plan Report.

Enable these permissions as needed.

## Getting Care Plan Updates – Initial Setup

To download pricing rows and terms as well as care plan repair SKUs, use the **Care Plan Updates** feature. This is usually only needed when you first start with JMIC. To do so:

1. Go to **Administrative ► JM Care Plan Administration ► JM Care Plan Check for Updates**.
2. The Edge will contact JMIC and update your plan files.

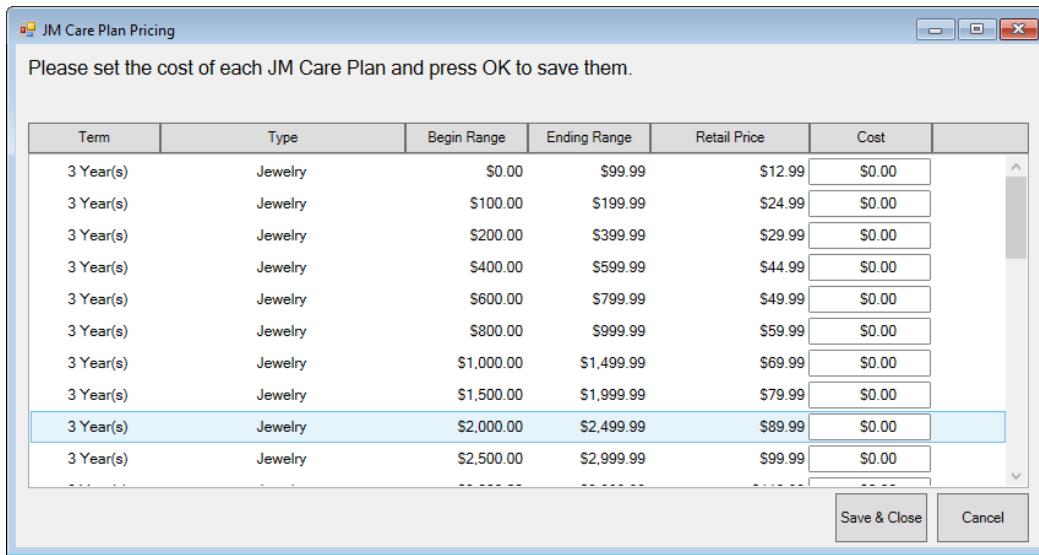


3. That's it! You're ready to go.

## Care Plan Pricing Customization

Once you have the plans and initial pricing downloaded, you can edit them to suit your needs. To do so:

1. Go to **Administrative ► JM Care Plan Administration ► JM Care Plan Pricing**. The **Care Plan Pricing** window will appear.



Fields and option in the **JM Care Plan Pricing** window include:

- Term**                      The length of coverage on the plan.
- Type**                      The category of coverage. Options include:  
Watch  
Jewelry
- Begin Range**              The lower end of the item retail price range within this plan.
- Ending Range**              The upper end of the item retail price range within this plan.
- Retail Price**              The pricing of plans is fixed by JMIC.
- Cost**                        The cost to you from JMIC for the coverage. This is set by arrangement between you and JMIC. The data is not automatically populated; you must enter the costs here. This data must be entered to have correct sale line data written to the database and for accurate sales reporting.

2. Enter the costs into the **Cost** fields for each type and range.
3. Select **OK**. The prices will be saved.

## Care Plan Repair SKUs

Care plan repair SKUs will be downloaded into The Edge when you do Care Plan Update. See the section entitled Getting Care Plan Updates – Initial Setup. These will be needed to ensure repairs done on covered items are uploaded to Montage correctly. After that, to see the list of SKUs for care plan repairs, go to **Administrative ► JM Care Plan Administration ► Repair SKUs**.

SKU	Description	Price	Alias	Key 1	Key 2	Key 3	Key 4
WJ2003	Replace 1/2 Shank			Care Plan	Shank	1/2 Shank	Non Platinum
WJ2004	Replace 1/2 Shank Platinum			Care Plan	Shank	1/2 Shank	Platinum
WJ2005	Replace 1/2 Shank Platinum			Care Plan	Shank	1/2 Shank	Platinum
WJ2006	Replace Full Shank			Care Plan	Shank	Full Shank	
WJ2007	Replace Full Shank			Care Plan	Shank	Full Shank	
WJ2008	Straighten Shank			Care Plan	Shank	Straighten	Non Platinum
WJ2009	Straighten Shank Platinum			Care Plan	Shank	Straighten	Platinum
WJ300	Straighten Prong			Care Plan	Prongs	Straighten	
WJ301	Re-Tip Prong			Care Plan	Prongs	Re-Tip	
WJ302	Replace Prong			Care Plan	Prongs	Replace Prong	
WJ303	Replace "V" Prong			Care Plan	Prongs	Replace "V" Prong	
WJ4000	Tighten Stone(s)			Care Plan	Stone	Tighten	
WJ4001	Set Round Stone in Existing Seat			Care Plan	Stone	Round	Set
WJ4002	Set Fancy Stone, Cut New Seat			Care Plan	Stone	Round	Set
WJ4003	Set Round Stone in Existing Seat			Care Plan	Stone	Round	Set
WJ4004	Set Fancy Stone, Cut New Seat			Care Plan	Stone	Round	Set
WJ4005	Set Round Stone in Existing Seat			Care Plan	Stone	Fancy	Set
WJ4006	Set Fancy Stone, Cut New Seat			Care Plan	Stone	Fancy	Set
WJ4007	Set Round Stone in Existing Seat			Care Plan	Stone	Fancy	Set
WJ4008	Set Fancy Stone, Cut New Seat			Care Plan	Stone	Fancy	Set
WJ4009	Set Channel Set Stone			Care Plan	Stone	Channel Set	
WJ4010	Set Invisible Set Stone			Care Plan	Stone	Invisible Set	
WJ5000	Re-stringing - 7"			Care Plan	Re-stringing	7"	
WJ5001	Re-stringing - 15"			Care Plan	Re-stringing	15"	

## Setup Tax Definitions

If your tax jurisdiction(s) require sales tax to be collected on care program fees, you'll need to review all your tax definitions.

1. **Administrative ► Sales Tax ► Tax Definitions.**
2. Create or go to any necessary tax definitions as described in The Edge User Guide (<http://docs.edgeuser.com/NetHelp/Documents/taxdefinitions.htm>).
3. Go to the **Other** tab and check the **JM Care Plan** checkbox.

Sales Tax Definition 'CT Sales'

General Categories Stores Misc. Other

Appraisals  
 Repair Parts  
 Repair Labor  
 Repair Other  
 Custom Parts  
 Custom Labor  
 Custom Other  
 Shipping  
 Restocking And Cancellation Fees  
 JM Care Plan

All None

1 of 1

- Sales tax will be applied at POS as described in the section entitled Working with Care Plans at POS.

## Care Plan Category Options

Qualification for item coverage happens at the category level and according to your license. Some item categories can never be qualified such loose stones and component parts. You can exclude other item categories from care plans. To do so:

- Go to **Inventory ► Categories ► List** to locate the category with which you wish to work.
- Go to the **General** tab of the category record.

The screenshot shows the 'Category 100 Diamond Engagement Rings' window. The 'General' tab is selected. The 'Inactive' checkbox is unchecked. The 'ID, Name' field contains '100 Diamond Engagement Rings'. The 'Department' is 'Diamond Engagement Rings', 'Type' is 'RING', and 'Gender' is 'Female'. The 'Generic Description' is 'Engagement Ring'. The 'Commission Adjustment' is '100.00%'. The 'Default Pricing Method For Items In This Category' is 'Fine Jewelry, Individual Item Pricing'. The 'Unit Of Measure' is empty. The 'Category Lead Time for Jobs' is empty. The 'Exclude Category From JM Care Plan' checkbox is circled in red. The window has a status bar at the bottom with navigation and action buttons.

- Select **Exclude Category from JM Care Plan**. Only loose stone and component categories are excluded by default.
- Select a **Save** option.

## Setting Up Care Plans in QuickBooks

You'll need to map accounts for care plan activities in QuickBooks. To do so:

- Create a Care Plan account in QuickBooks.
- From **Administrative ► QuickBooks ► Set Up QuickBooks Integration**, select the **Accounts** tab.
- Select an account from the account hierarchy.
- Select a QuickBooks account from the drop-down list at the bottom of the window.


## Working with Care Plans at POS



We recommend that your associates introduce the care plan during the sales process, when showing the piece and talking about the benefits and pricing before getting to point of sale. That way it's not sold as an add-on or interpreted as an upsell.


To work with product care programs at POS:

1. When making a sale at POS, after you have entered the associate, found the customer, scanned the item, you'll see that each sale line contains an option to add the care program.

1	001-100-00726 Delete Line More...		Lady's White 14 Karat Prong Set Engagement Ring Size 6.5 With 52=0.65Tw Round I I1 Diamonds	\$1,995.00	\$1,995.00
				0.00%	\$134.66
				\$0.00	\$2,129.66
				<input checked="" type="checkbox"/> Include Care Plan	\$0.00

3 Year Jewelry Care Protection Plan for \$79.99  
 Lifetime Jewelry Care Protection Plan for \$224.99

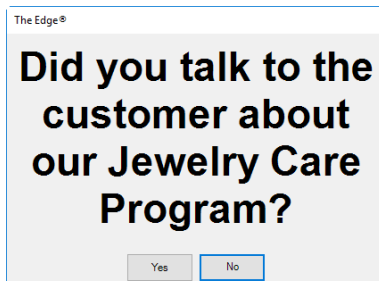
2. Explain the care program to your customer and ask if they would like to purchase it.
3. When the customer agrees, select the appropriate plan and check the **Include Care Plan** box.
4. The care plan price will appear in the sale line below the final item price. Change it if desired.

1	001-100-00726 Delete Line More...		Lady's White 14 Karat Prong Set Engagement Ring Size 6.5 With 52=0.65Tw Round I I1 Diamonds	\$1,995.00	\$1,995.00
				0.00%	\$134.66
				\$0.00	\$2,129.66
				<input checked="" type="checkbox"/> Include Care Plan	Lifetime Jewelry Care Protection Plan for \$224.99



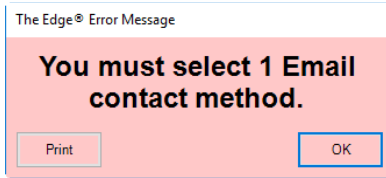
- If you're selling more than one of the same quantity, but the customer only wants protection on one or some of them, sell the items in separate sale lines and indicate the care plan in only the desired sale line.
- If the customer wants to add the plan after the sale is complete, return the item and resell it with the plan.

5. The transaction total will include the fee and, if applicable, sales tax on it. Talk with your accountant and see the section entitled Setup Tax Definitions if your tax jurisdiction requires tax on such fees.
6. Complete the sale as usual.
7. Depending on your **System Options**, if you select **Done** without checking the **Include Care Plan** checkbox, you will be prompted to confirm that you talked with the customer about it.

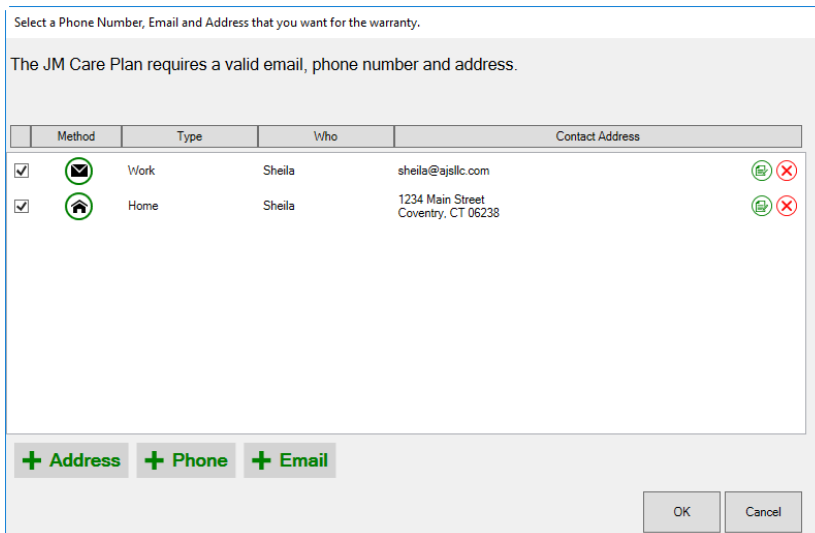


8. Select **Yes** or **No** and discuss the plan with the customer.
9. Continue with the sale.
10. When you select **Done**, if the customer does not have an address, phone number, and email address on record, you will be prompted to provide this information:

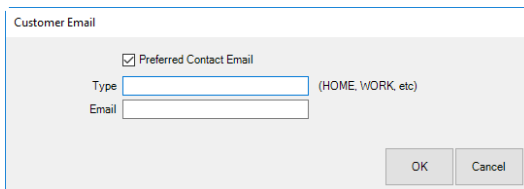




- a. Select **OK** to see the **Select a Phone Number, Email and Address that you want for the warranty** window.

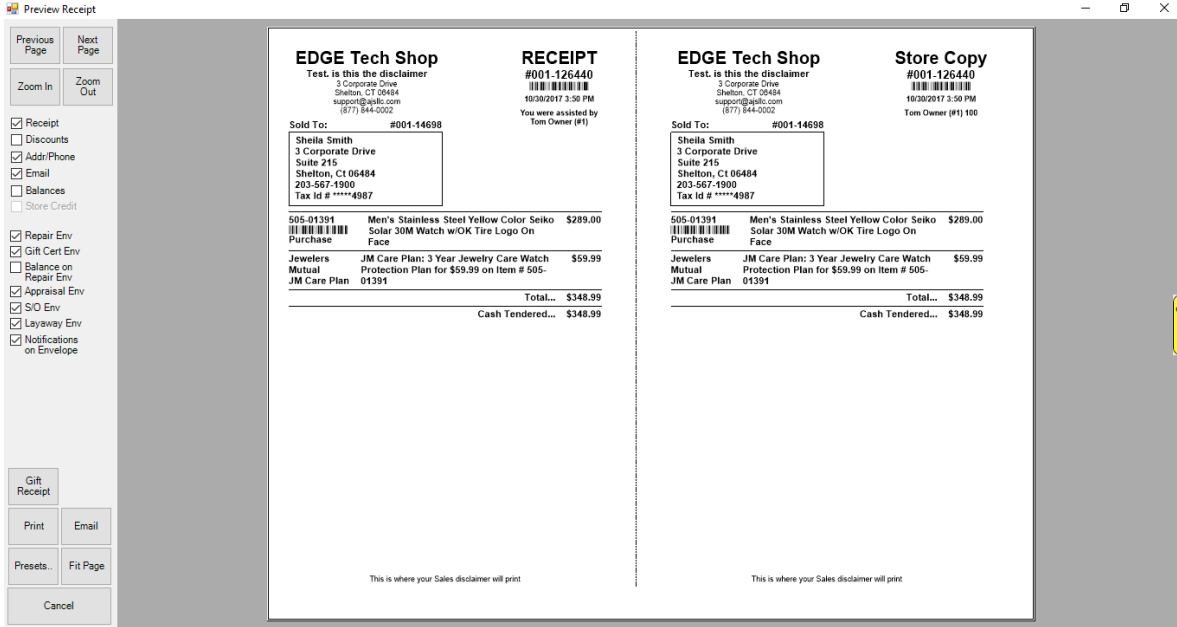


- b. Select **+ Address**, **+ Phone**, or **+Email** as requested and enter the desired information.



- c. Select **OK**.
- d. Select **Done** again to complete the sale.

11. The receipt will show the plan.



- Your sales data should be reported to JMIC on a daily basis using the process described in the section entitled **Uploading Transactions** and you will be billed accordingly. Be sure this data matches that in the **JM Care Plan Report**.
- There is no sales tax shown on the sale line in POS, but it will be added to the total and on the receipt.

## Care Plan Returns



Sales that contain care plans cannot be voided or altered.



Return data should be uploaded daily from The Edge to JMIC along with sales data.

## Item with Care Plan Return

If an item with a care plan is returned within the care plan return period, the care plan is returned as well. The care plan return period is specified in **System Options ► Care Plan Max Return Period**. Check with your state's laws on this. To do such a return:

1. At point of sale, find the customer.
2. Select **Return/Adjust**. A list of transactions for that customer 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	Description
10/30/2017	JM Care Plan	001-505-01391 JM Care Plan	\$59.99	JM Care Plan: 3 Year Jewelry Care Watch Protection Plan for \$59.99 on Item # 505-013
10/30/2017	Inventory	001-505-01391	\$289.00	Men's Stainless Steel Yellow Color Seiko Solar 30M Watch w/OK Tire Logo On Face
9/22/2017	Donation	001-445-05319	\$0.00	18" - Black Satin Cord
9/7/2017	Inventory	001-500-01130	\$279.00	Ladies Stainless Steel Watch w/White Face & Wimmer's Logo
9/7/2017	Inventory	001-100-05083	\$18,070.00	1.464ct tdw 18kwy Repertoire Select Diamond Shank Solitaire Engagement Ring By HC

Presets.

3. Select the item to return.
4. Select **OK**. The Edge will automatically populate two line items, one for the item to return and one for the care plan to return.

1	001-505-01391 <input type="button" value="See Sale"/>	(RETURNING) Men's Stainless Steel Yellow Color Seiko Solar 30M Watch w/OK Tire Logo On Face	(\$289.00) \$0.00 (\$289.00) Fee \$57.80
2	JM Care Plan Retu <input type="button" value="Delete Line"/> <input type="button" value="See Sale"/>	(Returning) JM Care Plan: 3 Year Jewelry Care Watch Protection Plan for \$59.99 on Item # 505-01391	<del>\$59.99</del> \$0.00 (\$59.99)

5. Continue with the return transaction as usual.

## Care Plan Only Return

The plan alone can be returned as well. To receive a refund for the plan, it must be returned within the care plan return period. To do so:

1. At point of sale, find the customer.
2. Select **Return/Adjust** and locate the desired line care plan to return.

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

SKU...  
Job #...

Date	Type	SKU	Price	Description
10/30/2017	JM Care Plan	001-505-01391 JM Care Plan	\$59.99	JM Care Plan: 3 Year Jewelry Care Watch Protection Plan for \$59.99 on Item # 505-013
10/30/2017	Inventory	001-505-01391	\$289.00	Men's Stainless Steel Yellow Color Seiko Solar 30M Watch w/OK Tire Logo On Face
9/22/2017	Donation	001-445-05319	\$0.00	18" - Black Satin Cord
9/7/2017	Inventory	001-500-01130	\$279.00	Ladies Stainless Steel Watch w/White Face & Wimmer's Logo
9/7/2017	Inventory	001-100-05083	\$18,070.00	1.464ct tdw 18kwtg Repertoire Select Diamond Shank Solitaire Engagement Ring By HC

Presets... OK Cancel

- The Edge will populate the return line item.

1	JM Care Plan Retu	(Returning) JM Care Plan: 3 Year Jewelry Care Watch Protection Plan for \$59.99 on Item # 505-01391	\$59.99
			\$0.00
			(\$59.99)

Delete Line See Sale

- Process the return as usual.

## Care Plan Returns Outside of Return Period

If the item or care plan return is outside the care plan return period, check with JMIC. The care plan fee may be prorated. It cannot be returned through The Edge.

## Working with Care Plan-Covered Repairs

Before charging the customer for repairs, be aware of what types of repairs are covered and for how long. JMIC will provide a list of places where customers can take their repairs, but we feel they will most likely come to you. If a customer brings in an item for repair and the item was bought from your store, at intake:

- Bring up the customer at point of sale.
- Select **Repair Intake**.
- From the **Item #** drop-down menu, select **Bought**. A list of items purchased by the customer will appear.

Items - 4 matching Sold to Smith, Sheila (001-14698).

Item #	Old #	Retail	Current	Status	Status Date	Type	Location	Price Method	Qty	Entered	Vendor	Vendor Style	S
<input type="checkbox"/> 001-100-05083		\$18,070.00	\$18,070.00	S	9/7/2017	S	case 4			4/1/2015	DI	HBSSRRD050...	
<input type="checkbox"/> 001-445-05319		\$20.00	\$20.00	N	9/22/2017	S	case 11			11/9/2016	SR	CH1007:102:P	
<input type="checkbox"/> 001-500-01130		\$279.00	\$279.00	S	9/7/2017	S	case 12			8/30/2016	BL	A8060--SIL	
<input type="checkbox"/> 001-505-01391		\$289.00	\$289.00	S	10/30/2017	S	case 2			1/25/2016	SE	SNE036	

Presets... Details Supervisor... Print List... Select Cancel

- Select the item to be repaired. The **Repair Intake** window will show that the item has a care plan.

Repair Intake

**Describe The Item To Be Repaired**

Item Description: (For Customer Receipt)  
 0.47ct tdw 14kwyg Semi-Mount Engagement Ring to hold 1ct Stone (Item #140-01605)

Declared Value: \$1,499.00

Private Notes: [Enter optional private notes]

Condition Notes:

Who: [Dropdown]

Already Finished

Express Service

Estimate Only

Notify: [Dropdown]

Show All Associates

Item #: 001-140-01605

**JM Care Program: 3 Year Warranty until (11/7/2020)**

Tasks Parts History

**Describe the Tasks to be Performed**

Task	SKU	Description	Price	Tx
1	[Dropdown]	[Dropdown]	Parts	<input checked="" type="checkbox"/>
			Labor	<input checked="" type="checkbox"/>
			Other	
			Total	

Who: [Dropdown]

ETA: [Dropdown]

ETA Is Estimated

Price Is Estimated

Subtotal: \$0.00

Tax: \$0.00

Total: \$0.00

Deposit: [Input]

Due At Pickup: \$0.00

Buttons: Move Task Up, Add Task, Task Details, Move Task Down, Cancel / Uncancel Task, Save & New, OK / Save & Close, Cancel

- Complete the repair intake fields as usual.
- When you get to the repair SKU, select **Find SKU**. The **Repair SKU Lookup** window will appear, and because this item has a care plan, the **Care Plan SKU** option will appear on the bottom of the window.

Repair SKU Lookup - 1795 matching SKUs.

Task Keywords: [Input]

Task Desc: [Dropdown]

SKU: [Dropdown] [Prev] [Next]

Buttons: Start Over, Pick..., Care Plan Sku, OK, Cancel

7. Select **Care Plan SKU**. The keywords `Care Plan` will appear in the keywords field.
8. The **Task Desc** and **SKU** drop-down menus will be populated with services available for covered repairs or services.
9. From the **Task Desc** drop-down menu or **SKU** drop-down menu, select the desired repair.
10. Select **OK**.
11. Complete the repair intake as usual. Notice that costs to the customer are all 0.

1	Repair	Ladies Stainless Steel Watch w/White Face & Wimmer's Logo (Item #500-01130) Tasks:[WW1003] [Covered by: Care Plan] Clean, Oil, Adjust - Quartz Watch.	Env. 1	\$0.00
	<input type="button" value="Delete Line"/> <input type="button" value="Modify"/>			\$0.00
				\$0.00
			Deposit...	\$0.00



**At some point you must visit the JMIC portal to confirm that the customer is eligible for the repair. We recommend that it be after a brief initial intake before the work is performed. Then we recommend that you obtain a verbal approval to proceed before doing the work. Finally, at some point, the customer will be asked to sign off that they understand they have used that benefit.**

## Care Plan References

Options and evidence of the Care Program appear throughout The Edge. The following sections outline them.

## Customer Record Care Plan Data

The **Activity** tab of the customer record will show items sold along with a line for the care program. There is an option to filter activity results containing jewelry care plans.

Edit Customer - Zachary, Mike (001-00652)

General Other Keys Balances Wish List Activity Notes Pop-Ups Options Rewards Appointments

Criteria

- Merchandise
- Repairs
- Custom Jobs
- Appraisals
- Layaway
- Special Orders
- Postcards
- Tender
- Store Credit
- House Account
- Returns
- Trade-In
- Misc Items
- Notifications
- Other
- Care Plan

Joint Account

- Mike Only
- Stacey Only
- Couple

See Sale... See Item/Service Return Item... Print List... Presets...

Date	Sale #	Item #/Service #	Sold	Retail	Who	Description
11/7/2017	001-126442-004		\$398.61		Mike	CASH
11/7/2017	001-126442-002		\$69.99		Mike	JM Care Plan: 3 Year Jewelry Care Watch Protection Plan for \$69.99 on Item #
11/7/2017	001-126442-001	001-500-01132	\$309.00	\$309.00	Mike	Description Ladies Stainless Steel Yellow Watch w/MOP Face & Wimmer's Lo
10/9/2017	001-126438-004		\$357.34		Mike	CASH
10/9/2017	001-126438-002		\$49.99		Mike	Montage: 2 Year Jewelry Care Watch Protection Plan for \$49.99 on Item # 50
10/9/2017	001-126438-001	001-500-01109	\$289.00	\$289.00	Mike	Description Ladies Stainless Steel Watch w/White Face w/"Wimmer's" Logo
8/28/2017	001-126432-003		\$211.64		Mike	CASH
8/28/2017	001-126432-001	001-150-05036	\$199.00	\$199.00	Mike	Description 0.07ct tdw 14kwtg Diamond Stud Earrings w/Ideal Cut Diamonds
8/28/2017	001-126431-003		\$211.64		Mike	CASH
8/28/2017	001-126431-001	001-150-05054	\$199.00	\$199.00	Mike	Description 0.055ct tdw 14kwtg Diamond Stud Earrings w/Ideal Cut Diamonds
8/14/2017	001-126428-003		\$74.45		Stacey	CASH
8/14/2017	001-126428-001	001-330-00058	\$70.00	\$70.00	Stacey	Description Freshwater Cultured Button Pearl Bracelet Set (3)
8/14/2017	001-126427-003		\$93.59		Mike	CASH
8/14/2017	001-126427-001	001-645-00003	\$88.00	\$88.00	Mike	Description Lady's White Sterling Silver Button Earrings With 10= Various Shap
8/9/2017	001-126426-003		\$530.69		Stacey	CASH

<< < 3 of 3 > >> Save & New Save & Duplicate Supervisor Switch to Spouse Revert Save & Stay OK / Save & Close Cancel

### Item Record Care Plan Data

The **History** tab of item records that have care programs on them will show the plan.

ITEMS - 001-505-01391

General Stones Tag Quantities Notes Pop-Ups Disassembled Pre-Appraise History Website

JM Care Program: 3 Year Warranty until (10/30/2020)

See Service See Sale See Customer

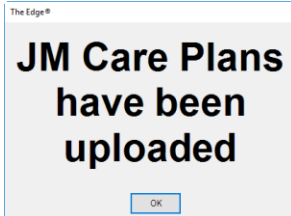
Date/Time	Sale #	Customer	Associate	Store #	Description
1/25/2016 3:52 PM			Unknown(#87)	1	Item Created
1/25/2016 3:53 PM			Unknown(#87)	1	Item Edited
1/25/2016 3:54 PM			Unknown(#87)	1	Item Edited
1/25/2016 4:30 PM			Gem, Nancy(#10)	1	Physical Inventory, Location (>>DTsaferoom- Ok Tire)
5/17/2016 10:06 AM			Unknown(#68)	1	Physical Inventory, Location (DTsaferoom- Ok Tire>>DTbackroom)
10/8/2016 1:59 PM			Unknown(#90)	1	Physical Inventory
12/22/2016 11:56 AM			Unknown(#26)	2	Item Edited, Type(O>>S)
1/16/2017 3:50 PM			Unknown(#0)	1	Item Edited
10/30/2017 3:50 PM	001-126440	Smith, Sheila (001-14698)	Owner, Tom(#1)	1	PURCHASE Men's Stainless Steel Yellow Color Seiko Solar 30M Watch w/OK Tire Logo On Face
10/30/2017 3:50 PM	001-126440	Smith, Sheila (001-14698)	Owner, Tom(#1)	1	WARRANTY JEWELERS MUTUAL JM Care Plan: 3 Year Jewelry Care Watch Protection Plan fo

<< < 1 of 1 > >> Save & New Save & Duplicate Supervisor Save & Print Revert Save & Stay OK / Save & Close Cancel

## Uploading Transactions

Transactions are collected in The Edge and then sent to JMIC on a daily basis. If you must perform a manual upload:

1. Go to **Administrative ► JM Care Plan Administration ► JM Care Plan Upload Data**.
2. The transactions will be uploaded and recorded by JMIC.



This data may take up to 48 hours to show up on JMIC's records and be reflected in bills.

## Reporting

### Care Plan Report

The **Care Plan** report is available under **Reports ► Management ► Care Plan**. The **Care Plan** report lists care plans sold, the items associated with them, and their status.

JM Care Plan Report								11/7/2017	
7 Days (11/1/2017 to 11/7/2017); Sort By: JM Care Plan Date Sold;								Page 1 of 1	
Customer Name	Sale ID	Date Sold	Who Sold	Care Plan Name	Term	Status	Retail	Cost	
Sheila Smith	001-126441	11/7/17	#1: Owner, Tom	JM Care Plan: 3 Year Jewelry Care Protection Plan for \$69.99 on Item # 140-01605	3 Year(s)	Active	\$69.99		
Mike Zachary	001-126442	11/7/17	#1: Owner, Tom	JM Care Plan: 3 Year Jewelry Care Watch Protection Plan for \$69.99 on Item # 500-01132	3 Year(s)	Active	\$69.99		
<b>Grand Totals</b>							<b>#2</b>	<b>\$139.98</b>	

Fields and option in the **Care Plan** report include:

<b>Customer Name</b>	The customer name.
<b>Sale ID</b>	The transaction ID for the sale.
<b>Date Sold</b>	The date the item and care plan were sold.
<b>Who Sold</b>	The associate who conducted the transaction.
<b>Care Plan Name</b>	The name of the plan that was sold.
<b>Term</b>	The length of the plan.
<b>Status</b>	The status of the plan, i.e., whether the plan is still in effect.
<b>Retail</b>	The price paid for the plan.
<b>Cost</b>	The cost to the merchant for the plan.

Care plan data will appear in **Daily Activity** reports as well, under **Misc** and marked with a **W**.





Be sure to match this data with your billing statement from JMIC.

## Care Plan Repair SKU Report

The **Care Plan Repair SKU** report lists repair SKUs used for care plan-covered repairs during the specified time period.

JM Care Plan Task SKU Report							11/17/2017	
Today (11/17/2017); Sort By: JM Care Plan Task SKU;							Page 1 of 1	
Repair #	Customer	Item #	SKU	Desc	Status	Total Cost	Rate	
001-126441-001	Smith, Sheila (001-14698)	001-505-01391	WW1011	Overhaul, Rolex, Daytona	Cancelled	\$0.00	\$0.00	
<b>Grand Totals</b>						<b>1</b>	<b>\$0.00</b>	<b>\$0.00</b>

Data fields in the **Care Plan Task SKU** report include:

- Repair #**            The transaction number for the repair.
- Customer**        The customer name and ID.
- Item #**            For repairs on items sold by the store, the item number.
- SKU**                The repair task SKU for the repair.
- Desc**              A description of the repair.
- Status**            The status of the repair.
- TotalCost**        The cost to the store for the repair.
- Rate**                The amount the care plan company has agreed to pay for the repair.