



Multi-Store for Users

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Introduction

The Edge contains a robust set of features for jewelers that operate more than one store. Multi-store allows you to track, sell, and receive inventory between stores. This document is provided as an overview of the benefits of multi-store configurations and how they work.

Depending on your corporate structure, tax structure, and preferences, multi-store may or may not be appropriate for your business. This document will help you decide.

If you wish to establish a relationship with a store that is under separate ownership and not part of the same corporate entity, multi-store configuration may not be appropriate for you. You should discuss this with your accountant.

Numbering System

In a multi-store environment, it is important to understand how stores, items, customers, transactions, and tasks are numbered in The Edge. The numbering system includes how numbers are assigned for item records during intake, how to transfer items to other stores, and report on inventory most efficiently. The same applies to transactions such as sales transactions, repairs, etc. Each of these things has an ID number assigned to it, the first part of which is the store number. With multi-store configurations, the transaction number takes on the store number of the location where the transaction took place.

When searching for records of items or transactions at a particular store, use the store number in the search filter.

For a more detailed explanation of numbering in The Edge, see the tip sheet entitled [Numbering Conventions](#).

Customer Management

As mentioned above in Numbering, customers are identified in the database by customer ID. When a customer is added in a multi-store environment, the store at which he or she was entered will be part of the customer ID, but The Edge allows access to all customer records in all stores. This shared customer base provides seamless customer service. For example, if a customer buys an item in one store, it can be returned in another. For items that are housed in one store, they can be transferred to another store. In another example, a customer may drop off a repair at one store, and you can transfer it so he or she can pick it up at a different store. Processing this pick-up is possible because The Edge tracks the record in a synchronized database.

As described in The Edge User Guide, customer records can contain a variety of contact information. If a record is created in one store, it can be found using the Customer Find feature in another store.

Credits/Balances/Pickups/Payments

Credits, balances, pickups, and payments can be managed from any store. You can even ship items to be picked up. A customer could buy something and return it to the other store or buy gift cards and use them at another store.

Accounts Receivable/Statement Generation

With customer records being shared between stores, a single customer may have receivable balances originating from multiple locations. Running receivable statements or reports for a single store may not show an accurate balance. Don't specify a store number when running any kind of statement or balance report.

Marketing and Postcards

Because customer records are synchronized between all stores, you can see how customer sales vary from location to location. For marketing based on purchase history and patterns such as amount spent, by vendor, etc., we recommend managing marketing campaigns from a central location, without a store filter, to ensure that customer criteria produce accurate results.

The postcard program was designed to be run from a central location. By default, multiple stores share a single postcard account. If you have multiple stores, and you want to have separate postcard accounts, (e.g., you want your postcards to have different return addresses), contact postcards@ajsllc.com to discuss this special configuration.

A scheduled task will automatically run only in the store where it was created, even though the scheduled task definition will be transferred to the other stores.

Inventory Management

In a multi-store environment, one location is designated as headquarters, and this location should be the place where most inventory is received and then allocated to other stores. Usually this location would be store 1. When you add items in a multi-store configuration, the **Allocation** screen will prompt you to distribute them to stores. Inventory can also be added at any other store location, and a modified numbering system will be applied automatically.

The primary inventory location will have a numbering system that contains a category ID followed by a five-digit item ID number. For example, it might be 100-00001. When items are entered at any other location, The Edge will automatically expand the item number to include the store and an extra digit before the five-digit number, e.g., 100-2000001. This way, no one item number is used twice. For more about allocating items to other stores, see the section in the User Guide entitled Allocate Inventory.

If it is common practice for you to add product at another store, be sure to test the item barcode to ensure that it scans properly with the expanded numbering system. Your tag layout may require adjustment to fit the expanded numbering.

Categories/Vendors

A single set of categories and vendors are shared across stores. This includes data associated with categories and vendors such as:

- tag layouts
- pricing
- details.

Printing Tags

Typically, in a multi-store environment, all tags are printed at a central location and then distributed to other stores with the item. However, if you commonly enter items at another location and wish to print tags, you may purchase additional tag printing equipment and supplies.

IMPORTANT!

The inventory tag layout is shared among all stores. Therefore, it is best for all stores to have the same make and model tag printer and must use the same tag type and layout. Your tag layout should accommodate all item number lengths.

Inter-Store Transfers

The Inter-Store feature allows you to ship and track items moving from one store to another. To ship an item to another store, select **Administrative ► Inter-Store ► Ship**. To receive an item coming in from another store, select **Administrative ► Inter-Store ► Receive**. Make sure you do this on both sending and receiving sides, otherwise the in-transit report will not be accurate. Item locations are automatically updated with statuses of “in-transit” and “received from store X.”

In the event that an item was not properly transferred but somehow physically resides in a store, you can still sell it. At POS, you will be prompted to confirm the action. For example: Item 100-00001 is still on record as being in store 1. The item is sold at store 2. The sales associate is asked for an override, which is provided, and proceeds with the sale. This results in a store 2 sale of a store 1 item. This is one area in which it may cause a problem if the stores are separate business entities.

Depending on **System Options**, the item number may be automatically changed to reflect the selling store number.

In Transit Report

The In-Transit report displays all in-stock inventory where the item location has a value of “in-transit.” We recommend that you use the **Inter Store ► Receive** feature to update the item locations as items are received from another location.

Physical Inventory

Physical inventory processes are detailed in the section of The Edge User Guide entitled Physical Inventory. For the purposes of a multi-store environment, note that during physical inventory, you may encounter items that were not properly transferred between stores, and therefore, The Edge still reflects the old location. When such an item is scanned, The Edge will warn you that the item belongs to a different store and then updates the store number to the present location.

System Options

To accommodate businesses that span different states or that have differing disclaimer needs, system options do not transfer between stores. Be sure to set system options for each store.

Reporting

Because of the way The Edge's database is set up, you have access to records of everything from every location. This is a big benefit of the multi-store configuration. Based on security settings, all records can be accessed from any location. Most report filters include a **Store** field; to include data from all stores, leave this field blank. Most report filters include a **Group by** field; to see subtotals by store, use this option.

QuickBooks

The Edge QuickBooks integration is designed for businesses that are part of a single corporate tax entity. The Edge employs the use of "Classes" in QuickBooks to create some separation of store data, but this does not constitute a separate taxable business. We would advise against integrating with QuickBooks if you use The Edge multi-store setup for the convenience of transferring records between two separate businesses. If you are unsure how to setup QuickBooks Classes or to find out if this is right for you, contact your accountant.

Maintenance

System Configuration

We will support your IT technician in configuring The Edge. We discourage changing configuration settings without consulting The Edge Support Team. More detail is available in the tip sheet entitled [Multi-Store for Technicians](#).

Version Updates

Updating The Edge in a multi-store environment is similar to updating in a single store with one exception: You must synchronize and disable multi-store transfers before updating. See the tip sheet entitled [Updating The Edge in a Multi-Store Environment](#).

Backing Up

We recommend backing up your databases in each location frequently, even as often as every day. For more information about backing up, see the section in the User Guide entitled [Backing Up the Database](#).

Synchronizing between Stores

In a multi-store environment, each location has a local database. The specialized synchronizing software runs many times throughout the day to keep these databases current. For the technical details about how this works, see the tip sheet entitled [Multi-Store for Technicians](#).

You should always be aware when something is offline and not syncing properly. If you suspect you're not seeing activity from another store, contact The Edge Support Team.

If you wish to transfer a record without waiting for the scheduler to cycle, you can manually synchronize The Edge by running the synchronization program: `\ProgramFiles (x86)\ajsllc\edge\txclient.exe`. Do this at both the sending and receiving stores.

Example: If you added a brand new item at store 1 and need it to be available right away at store 2, do the following:

1. At store 1, add the item.
2. At store 1, run the program: `\ProgramFiles (x86)\ajsllc\edge\txclient.exe`.
3. At store 2, run the program: `\ProgramFiles (x86)\ajsllc\edge\txclient.exe`.
4. At store 2, look up the item, it should now be available.