# THE EDGE®

Departments

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Introduction

In addition to categories, The Edge allows you to create custom departments, an additional way to group items and services that is especially useful for reporting purposes. Departments can include not only inventory (by category), but also repairs, appraisals, custom jobs, and miscellaneous sale lines.

Department Setup

To work with departments:

1. Select **Administrative ► Lists**. This will open the **List of Lists** screen.
2. Open the **Department** list. The departments in the list will appear. These are departments that are available.
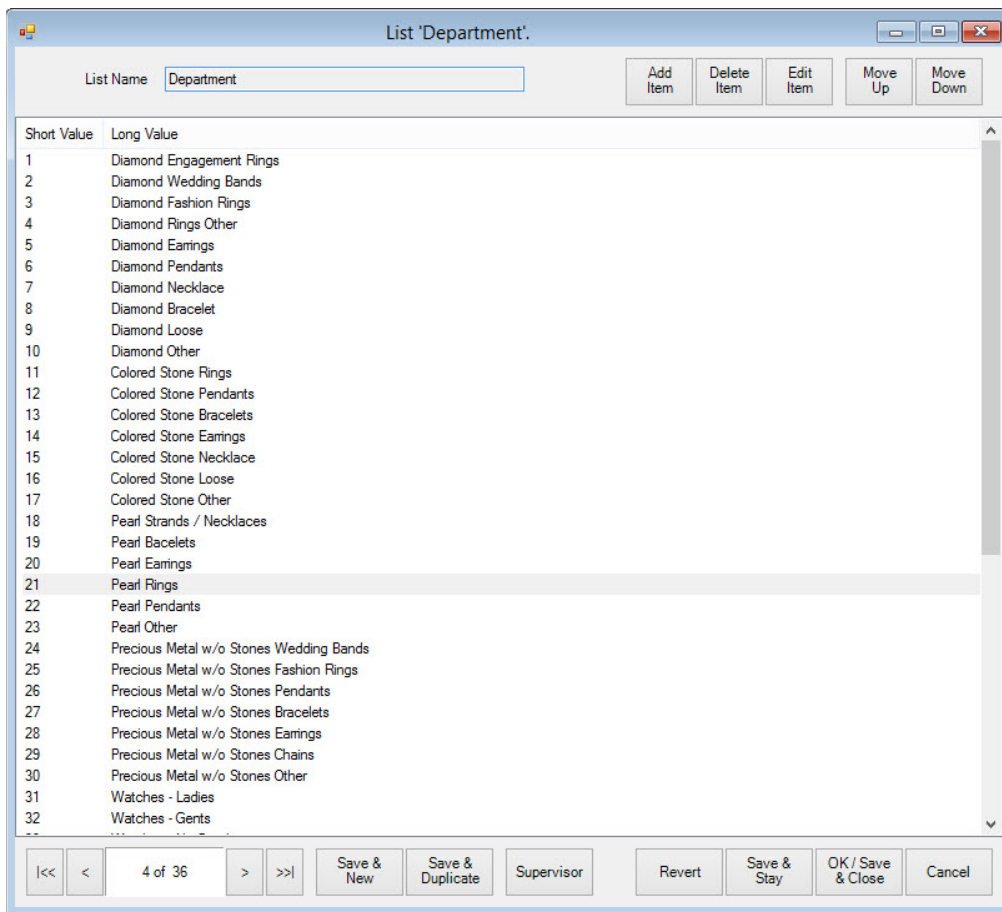
To edit a department record, double-click the department record. The **List Item** screen will appear.

Fields in the **List Item** screen include:

Short Value	An abbreviation or code for this department (e.g., 001, DIA, 1001).
Original ID	The same as **Short Value**.
Long Value	A description for this department.

3.   Make changes in the **List Item** screen as needed and select **OK/Save & Close**.

For instructions on putting items in departments, see the section entitled Populating Departments.

TIP!
If you have no departments defined and where possible, The Edge will automatically create departments based on your category setup.   Your System Options will be modified to ensure default departments are created.

Populating Departments

By Category

Inventory can be assigned to a department by category. Specifying a department in a category will override the default department system option assignment (if any).

To assign a category to a department:

1.   Select **Inventory ► Categories ► List**. A list of categories will appear.
2.   Double click or edit the category you want to assign.
3.   From the **Department** drop-down menu on the **General** tab, select the department to which you want this category assigned. All items in the category will be assigned.

4.   Select **OK/Save & Close** to save your changes.

By Repair SKU

Services such as repair tasks can be assigned to a department, but they must be predefined repair SKUs. Specifying a department on a service will override the default department system option assignment (if any).

To assign a service to a department:

1. Select **Administrative ► Repair ► Repair SKUs**.
2. Double click or edit the repair SKU you want to assign.
3. From the **Department** drop-down menu on the **General** tab, select the department to which you want this service assigned.
4. Select **OK/Save & Close**.

By Miscellaneous Sale Line

Miscellaneous sale lines can be assigned to a department. Specifying a departmentin a miscellaneous sale line will override the default department system option assignment (if any).

To assign a miscellaneous sale line to a department:

1. Select **Administrative ► Misc Sale Lines**.
2. Double click or edit the miscellaneous sale line you want to assign.
3. From the **Department** drop-down menu on the **General** tab, select the department to which you want this miscellaneous sale line assigned.
4. Select **OK/Save & Close**.

Department Defaults

Though not required, default departments can be setup for appraisals, custom jobs, inventory (categories), miscellaneous sale lines, and repairs. The default department will be used if one is not otherwise specified on the category, repair SKU, etc.

To setup default departments:

1. As described in the section entitled Department Setup, set up departments to act as the defaults for appraisals, customer jobs, inventory, miscellaneous items, and repairs.
2. Select **Administrative ► System Options**.
3. Scroll down to the **Department Defaults** section.

⊟ Department Defaults	
Default_Appraisal_Department	**Appraisals**
Default_Custom_Department	
Default_Inventory_Department	
Default_Misc_Item_Department	
Default_Repair_Department	

4. Use the drop-down menus for each area to select a default department.
5. Select **OK** to save your changes.