



# Jewelry Care Plans: Montage

## Table of Contents

- Introduction ..... 2
- Program Coverage ..... 2
  - Jewelry Care ..... 2
  - Watch Care ..... 2
- Program Terms ..... 2
- Licensing ..... 3
  - Partner Contact Information ..... 3
- Setting Up the Care Program ..... 3
  - System Options ..... 3
  - Associate Commissions ..... 3
  - Security Options ..... 4
  - Getting Care Plan Updates – Initial Setup ..... 4
  - Care Plan Pricing Customization ..... 4
  - Care Plan Repair SKUs ..... 5
  - Setup Tax Definitions ..... 6
  - Care Plan Category Options ..... 7
  - Setting Up Montage in QuickBooks ..... 7
- Working with Care Plans at POS ..... 7
- Care Plan Returns ..... 11
  - Item with Care Plan Return ..... 11
  - Care Plan Only Return ..... 12
  - Care Plan Returns Outside of Return Period ..... 12
- Working with Care Plan-Covered Repairs ..... 12
- Care Plan References ..... 14
  - Customer Record Care Plan Data ..... 14
  - Item Record Care Plan Data ..... 15
- Uploading Transactions ..... 15
- Printing Terms ..... 16
- Reporting ..... 16
  - Care Plan Report ..... 16
  - Care Plan Repair SKU Report ..... 17
- FAQs ..... 18

## Introduction

Along with Montage Jewelry Care, 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

Available program terms break down as follows.

- Merchandise:
  - 2-year coverage
  - 3-year coverage
  - 5-year coverage
  - Lifetime – includes center stone
- Watches:
  - 1-year coverage
  - 2-year coverage
  - 3-year coverage
  - 5-year coverage

## Licensing

Here's how to get started:

1. Contact The Edge Customer Service team at [service@ajsllc.com](mailto:service@ajsllc.com) or Montage Jewelry Care Sales Support at (888) 652-9970.
2. You'll be licensed by one of The Edge's care plan partners, in this case, Montage.
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 Montage will bill you for the cost of the plans.

## Partner Contact Information

Montage 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: <b>Requires Override:</b> Requires an override to allow the discount. <b>Permission Check Only:</b> The Edge will check to see if the associate has permission to do this. <b>No Discounting:</b> No discounting will be allowed by anyone. <b>No Permission Checks:</b> 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 <code>Did you talk to the customer about our Jewelry Care Program?</code> 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 <code>True</code> .

## 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 Warranties** field is not left blank, these values will appear in the **Commissions** report as well as **Activity** reports.

## Security Options

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

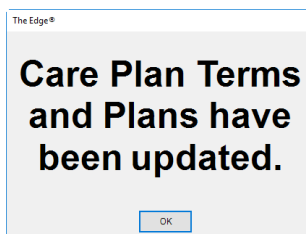
- Administer Care Plans
- Discount Care Plans at POS

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 Montage. To do so:

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

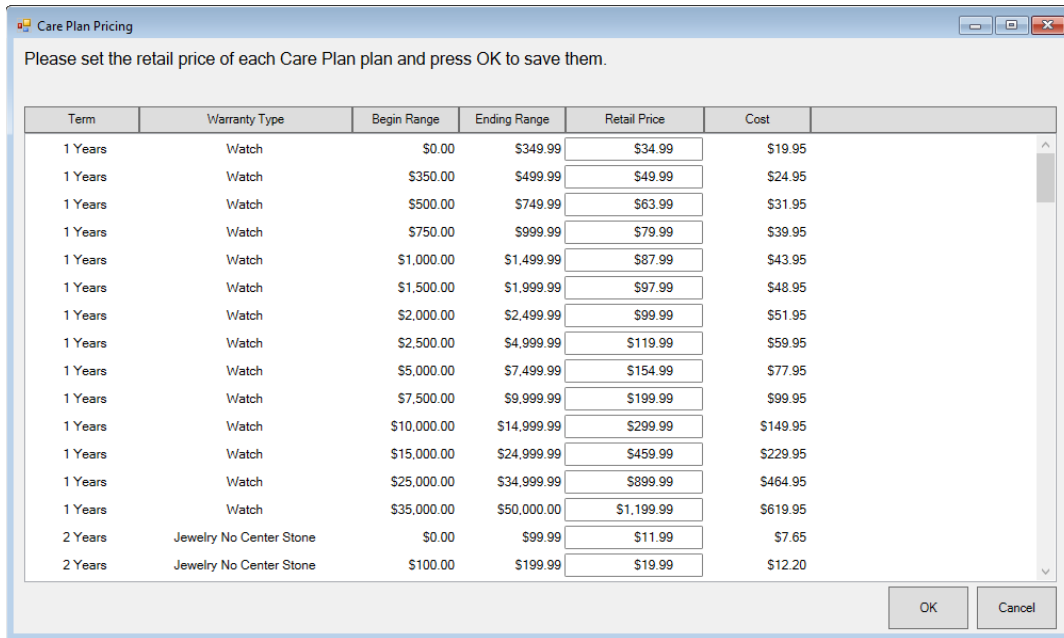


3. That's it! You're ready to go.

## 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 ► Care Plan Administration ► Care Plan Pricing**. The **Care Plan Pricing** window will appear.



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

- Term** The length of coverage on the plan.
- Warranty Type** The category of coverage. Options include:  
 Watch  
 Jewelry No Center Stone  
 Jewelry with Center Stone
- 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 suggested amount you should charge for the plan.
- Cost** The cost to you from Montage for the coverage. Keep this in mind if you change the pricing; you'll want to make sure you cover this cost.

2. If desired, edit the **Retail Price** of each plan.
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 ► Care Plan Administration ► Repair SKUs**.

SKU	Description	Price	Alias	Key 1	Key 2	Key 3	Key 4	Key 5	Key 6
WE1000	Engrave			Care Plan	Engrave				
WJ1000	Size Ring Smaller			Care Plan	Sizing	Smaller	Lady's	Non Platinum	
WJ1001	Size Platinum Ring Smaller			Care Plan	Sizing	Smaller	Lady's	Platinum	
WJ1002	Size Ring Smaller			Care Plan	Sizing	Smaller	Men's	Non Platinum	
WJ1003	Size Platinum Ring Smaller			Care Plan	Sizing	Smaller	Men's	Platinum	
WJ1004	Size Ring Larger			Care Plan	Sizing	Larger	Lady's	Non Platinum	
WJ1005	Size Platinum Ring Larger			Care Plan	Sizing	Larger	Lady's	Platinum	
WJ1006	Size Ring Larger			Care Plan	Sizing	Larger	Men's	Non Platinum	
WJ1007	Size Platinum Ring Larger			Care Plan	Sizing	Larger	Men's	Platinum	
WJ1008	Add Sizing Beads/Balls			Care Plan	Sizing	Beads/Balls	Non Platinum		
WJ1009	Add Platinum Sizing Beads/Balls			Care Plan	Sizing	Beads/Balls	Platinum		
WJ1010	Special Sizing			Care Plan	Sizing	Special			
WJ2000	Replace 1/4 Shank			Care Plan	Shank	1/4 Shank			
WJ2001	Replace 1/4 Shank			Care Plan	Shank	1/4 Shank			
WJ2002	Replace 1/2 Shank			Care Plan	Shank	1/2 Shank	Non Platinum		
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		

## 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 **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

Care Plan

1 of 1

Save & New Save & Duplicate Revert Save & Stay OK / Save & Close Cancel

4. 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:

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

The screenshot shows the 'Category 140 Diamond Semi-Mount Rings' window. The 'General' tab is selected. The 'Inactive' checkbox is unchecked. The 'ID, Name' field contains '140 Diamond Semi-Mount Rings'. The 'Department' is 'Diamond Rings Other', 'Type' is 'RING', and 'Gender' is 'Unisex'. The 'Generic Description' is '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 Care Plan' checkbox is checked and circled in red. The bottom of the window shows navigation buttons and a status bar indicating '7 of 64' items.

3. Select **Exclude Category from Care Plan**. By default, only loose stone and component categories have this option checked.
4. Select a **Save** option.

## Setting Up Montage in QuickBooks

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

1. Create a Montage account in QuickBooks.
2. From **Administrative ► QuickBooks ► Set Up QuickBooks Integration**, select the **Accounts** tab.
3. Select an account from the account hierarchy.
4. 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.
2. If your license allows more than one kind of plan, use the drop-down menu to see care plan available. If not, the default will show.


a. Multiple Plans Available

1	001-100-03582		14kwt Solitaire 5.5mm Engagement Ring Mounting - 6 Prong 1/2 Ct. Head	\$599.00	\$599.00
				0.00%	\$38.04
				\$0.00	\$637.04
				<input type="checkbox"/> Include Care Plan <div style="border: 1px solid black; padding: 2px;">                     3 Year Jewelry Care Protection Plan for \$74.99                      5 Year Jewelry Care Protection Plan for \$79.99                      Lifetime Jewelry Care Protection Plan for \$139.99                 </div>	

b. Single Plan Available

1	001-200-01767		14kyg Created Green Garnet Medium Lens Cut Ring	\$900.00	\$900.00
				0.00%	\$57.15
				\$0.00	\$957.15
				<input type="checkbox"/> Include Care Plan <div style="border: 1px solid black; padding: 2px;">                     2 Year Jewellery Warranty for \$74.99                 </div>	

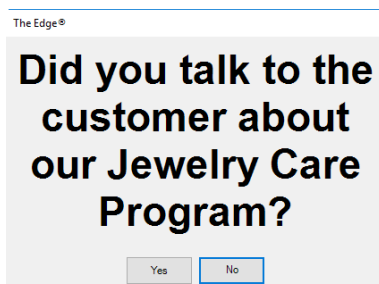
3. Explain the care program to your customer and ask if they would like to purchase it; you can refer to the drop-down menu to offer various programs and prices.
4. When the customer agrees, select the appropriate plan and the **Include Care Plan** checkbox.
5. The care plan price will appear in the sale line below the final item price. Change it if desired.

1	001-200-01767		14kyg Created Green Garnet Medium Lens Cut Ring	\$900.00	\$900.00
				0.00%	\$57.15
				\$0.00	\$957.15
				<input checked="" type="checkbox"/> Include Care Plan <div style="border: 1px solid black; padding: 2px;">                     2 Year Jewellery Warranty for \$74.99                 </div>	



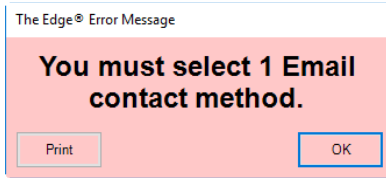
- If you're selling more than one of the same quantity, but the customer only wants protection on one or some of them, sell the items in separate sale lines and indicate the care plan in only the desired sale line.
- If the customer wants to add the plan after the sale is complete, return the item and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

6. 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.
7. Complete the sale as usual.
8. 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.

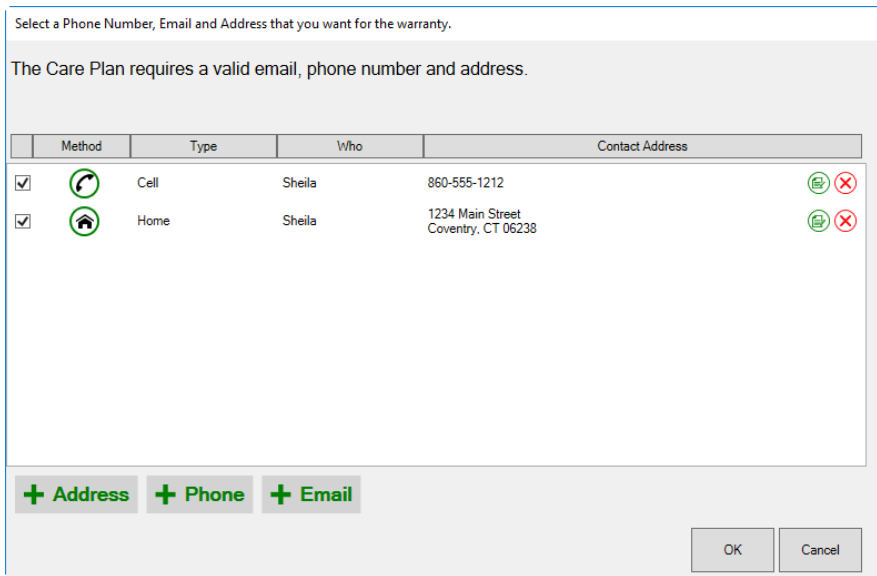


9. Select **Yes** or **No** and discuss the plan with the customer.
10. Continue with the sale.
11. When you select **Done**, if the customer does not have an address, phone number, and email address on record, you will be prompted to provide this information:

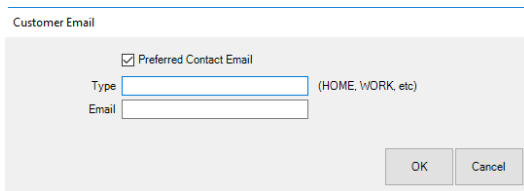




- a. Select **OK** to see the **Select a Phone Number, Email and Address** that you want for the warranty window.



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



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

12. The receipt will show the plan.

Preview Receipt

Previous Page Next Page

Zoom In Zoom Out

Receipt  
 Discounts  
 Addr/Phone  
 Email  
 Balances  
 Store Credit

Repair Env  
 Gift Cert Env  
 Balance on Repair Env  
 Appraisal Env  
 S/O Env  
 Layaway Env  
 Notifications on Envelope

Gift Receipt **Care Plan** Print Email

Presets... Fit Page

Cancel

<p><b>EDGE Tech Shop</b> Test. is this the disclaimer 3 Corporate Drive Shelton, CT 06484 support@ajslc.com (877) 844-0002</p> <p><b>RECEIPT</b> #001-126433 9/7/2017 8:34 AM You were assisted by Tom Owner (#1)</p> <p>Sold To: #001-14698 Sheila Smith 1234 Main Street Coventry, CT 06238 860-555-1213 Sheila@Ajslc.Com</p> <p>100-05083 Purchase </p> <p>1,464ct tdw 18kwg Repertoire Select Diamond Shank Solitaire Engagement Ring By HOF w/ideal Cut Diamonds of G-HVS-S11</p> <p>\$18,070.00</p> <p>Montage Care Plan Montage: 3 Year Jewelry Care Protection Plan for \$579.99 on item # 100-05083</p> <p>\$579.99</p> <p>SubTotal... \$18,649.99 CT Sales Tax... \$1,147.45 Total... \$19,797.44 Cash Tendered... \$19,797.44</p>	<p><b>EDGE Tech Shop</b> Test. is this the disclaimer 3 Corporate Drive Shelton, CT 06484 support@ajslc.com (877) 844-0002</p> <p><b>Store Copy</b> #001-126433 9/7/2017 8:34 AM Tom Owner (#1) 100</p> <p>Sold To: #001-14698 Sheila Smith 1234 Main Street Coventry, CT 06238 860-555-1213 Sheila@Ajslc.Com</p> <p>100-05083 Purchase </p> <p>1,464ct tdw 18kwg Repertoire Select Diamond Shank Solitaire Engagement Ring By HOF w/ideal Cut Diamonds of G-HVS-S11</p> <p>\$18,070.00</p> <p>Montage Care Plan Montage: 3 Year Jewelry Care Protection Plan for \$579.99 on item # 100-05083</p> <p>\$579.99</p> <p>SubTotal... \$18,649.99 CT Sales Tax... \$1,147.45 Total... \$19,797.44 Cash Tendered... \$19,797.44</p>
--	--

This is where your Sales disclaimer will print

13. To view and print the care plan terms, select **Care Plan** from the receipt window. If the receipt is to be emailed, the terms will go out with the email. You can also go to the shared folder (e.g., C:\ProgramData\AJSLLC\edge\CarePlanTerms) and print them out ahead of time.

Administrator: [Montage  
4035 Park East Court, Suite 300 | Grand Rapids, MI 49546  
(888) 807-2249]

**3 Year AGREEMENT**  
Extended Service Plan - Jewelry & Watches

PLEASE READ THIS AGREEMENT CAREFULLY. AS IT DESCRIBES THE PROTECTION YOU WILL RECEIVE IN RETURN FOR YOUR PAYMENT OF THE PURCHASE PRICE OF THIS AGREEMENT. YOU MUST KEEP THIS AGREEMENT AND YOUR SALES RECEIPT FOR THE PRODUCT YOU PURCHASED. THEY ARE INTEGRAL PARTS OF THIS AGREEMENT AND YOU MAY BE REQUIRED TO PRODUCE THEM TO OBTAIN SERVICE UNDER THIS AGREEMENT. YOU MUST MAINTAIN THE COVERED PRODUCT AS RECOMMENDED BY THE MANUFACTURER'S OWNER MANUAL AND/OR WARRANTY.

**NOTICE:** The Selling Retailer may be retaining a portion of the purchase price you paid for this Agreement. The purchase of this Agreement is not required to either purchase the Covered Product or to obtain financing. This Agreement does not replace the manufacturer's warranty for the Covered Product.

**I. DEFINITIONS**

- (1) "Buyer," "We," "Us" and "Our" mean the company obligated under this Agreement. Awaranty Corporation, [10151 Deerwood Park Blvd., Building 100, Suite 500, Jacksonville, FL 32256 (800-467-2216)] in all states except in Florida and Oklahoma where it is Lyndon Southern Insurance Company, [10151 Deerwood Park Blvd., Building 100, Suite 500, Jacksonville, FL 32256 (800) 888-2738], Florida License No. 03698, and in Wisconsin where it is The Service Dec Inc., [10151 Deerwood Park Blvd., Building 100, Suite 500, Jacksonville, FL 32256 (800) 867-2216].
- (2) "You" and "Your" mean the original purchaser of the Covered Product and any authorized transferee/assignee of the original purchaser, including the Lessee, if the Covered Product was acquired under an RTO Transaction.
- (3) "Administrator" means [Montage, 4035 Park East Court, Suite 300, Grand Rapids, MI 49546 (888) 807-2249].
- (4) "Selling Retailer" means the entity selling or leasing the Covered Product and this Agreement.
- (5) "Covered Product" means the consumer item which You purchased or leased concurrently with and is covered by this Agreement.
- (6) "Agreement" means this service plan, which You have purchased for the Covered Product shown on the Original Sales Receipt provided by the Selling Retailer.
- (7) "Rent To Own (RTO) Transaction" means a transaction evidenced by a written agreement identifying the Lessor and You identified as the Lessee, where You have use of the Covered Product and You will become the owner of the Covered Product at the completion of the RTO Transaction. No purchase will be treated as an RTO Transaction unless the Lessor is indicated on Your sales receipt.
- (8) "Lessor" means the party extending an RTO Transaction. Any cash settlement or refund payable while the RTO Transaction is in force will be payable to the Lessor.
- (9) "Lessee" means the party obligated to the Lessor under an RTO Transaction. Unless otherwise authorized by the Lessor, a Lessee is not entitled to the cash settlement or refund otherwise payable while an RTO Transaction is in force; and
- (10) "Original Sales Receipt" means the sales receipt provided by the Selling Retailer at the time of purchase and which details the Selling Retailer, the purchase date, the Agreement purchased, the Lessor (if the purchase is for an RTO Transaction), the items covered by the Agreement purchased and their Purchase Price.

**II. TERM:** The term of this Agreement begins on the date of purchase and continues for 3 year period following the date of purchase as specified on the Original Sales Receipt.

**III. COVERAGE:** THIS AGREEMENT PROVIDES CERTAIN ADDITIONAL BENEFITS DURING THE TERM OF THE MANUFACTURER'S WARRANTY. LOSSES COVERED BY THE MANUFACTURER DURING THE MANUFACTURER'S WARRANTY PERIOD ARE NOT COVERED UNDER THIS AGREEMENT. We agree to provide service consisting of parts and labor necessary to repair or replace the Covered Product in the event of structural or mechanical breakdown or defects in workmanship and/or materials, from normal wear.

Isabelle Products: This Agreement covers the maintenance of the Covered Product in the event of a loss of or part thereof if loss is due to a defect in



- Your sales data should be reported to Montage 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 **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 warranties cannot be voided or altered.



Return data should be uploaded daily from The Edge to Montage 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** and locate the desired line item.

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

All None

SKU... Job #...

Date	Type	SKU	Price	Description
9/7/2017	Care Plan	001-500-01130 Care Plan	\$34.99	Montage: 1 Year Jewelry Care Watch Protection Plan for \$34.99 on Item # 500-01130
9/7/2017	Inventory	001-500-01130	\$279.00	Ladies Stainless Steel Watch w/White Face & Wimmer's Logo
9/7/2017	Care Plan	001-100-05083 Care Plan	\$579.99	Montage: 3 Year Jewelry Care Protection Plan for \$579.99 on Item # 100-05083
9/7/2017	Inventory	001-100-05083	\$18,070.00	1.464ct tdw 18kgw Repertoire Select Diamond Shank Solitaire Engagement Ring By HOF w/ld

Presets. OK Cancel

3. 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	001-500-01130	(RETURNING) Ladies Stainless Steel Watch w/White Face & Wimmer's Logo	(\$279.00) (\$17.72) (\$296.72)
			Fee \$55.80
2	Care Plan Return	(Returning) Montage: 1 Year Jewelry Care Watch Protection Plan for \$34.99 on Item # 500-01130	-\$34.98 \$0.00 (\$34.99)

4. 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

Date	Type	SKU	Price	Description
9/7/2017	Care Plan	001-500-01130 Care Plan	\$34.99	Montage: 1 Year Jewelry Care Watch Protection Plan for \$34.99 on Item # 500-01130
9/7/2017	Inventory	001-500-01130	\$279.00	Ladies Stainless Steel Watch w/White Face & Wimmer's Logo
9/7/2017	Care Plan	001-100-05083 Care Plan	\$579.99	Montage: 3 Year Jewelry Care Protection Plan for \$579.99 on Item # 100-05083
9/7/2017	Inventory	001-100-05083	\$18,070.00	1.464ct tdw 18kwg Repertoire Select Diamond Shank Solitaire Engagement Ring By HOF w/Ideal

3. The Edge will populate the return line item.

1 Care Plan Return (Returning) Montage: 1 Year Jewelry Care Watch Protection Plan for \$34.99 on Item # 500-01130

Delete Line See Sale

-34.99  
\$0.00  
(\$34.99)

4. 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 Montage. 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. Montage 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 from repair and the item was bought from your store, at intake:

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

Items - 3 matching Sold to Smith, Sheila (001-14698).

Item #	Old #	Retail	Current	Status	Status Date	Type	Location	Price Method	Qty	Entered	Vendor	Vendor Style
<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

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.

**Describe The Item To Be Repaired**

Item Description: (For Customer Receipt)  
 Ladies Stainless Steel Watch w/White Face & Wimmer's Logo  
 (Item #500-01130)

Declared Value: \$279.00

Already Finished  
 New Envelope  
 Express Service  
 Estimate Only

Private Notes: Condition Notes:

Who:   Show All Associates Item # 001-500-01130

Care Program: 1 Year Warranty until (9/7/2018)

**Describe the Tasks to be Performed**

Task	SKU	Description	Price	Tx
>1	<input type="text"/>	[Enter required task description]	Parts	<input checked="" type="checkbox"/>
			Labor	<input checked="" type="checkbox"/>
			Other	
			Total	

Who:

ETA:   ETA Is Estimated  Price Is Estimated

Subtotal: \$0.00  
 Tax: \$0.00  
 Total: \$0.00

Deposit:   
 Due At Pickup: \$0.00

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.

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.

12. After the daily upload to Montage takes place, consult their website to follow up on eligibility and status. These are NOT automatically approved.



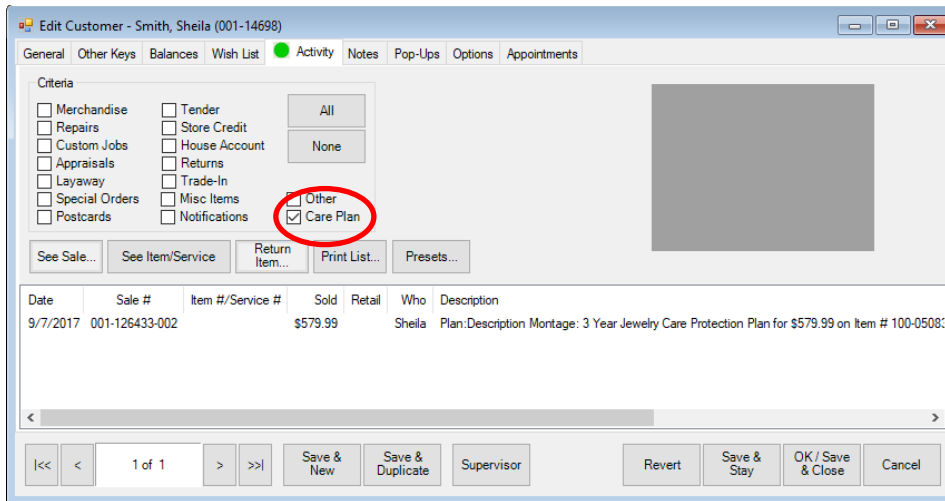
**At some point you must visit the Montage portal to confirm that the customer is eligible for the repair. We recommend that it be after a brief initial intake before the work is performed. Then we recommend that you obtain a verbal approval to proceed before doing the work. Finally, at some point, the 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.

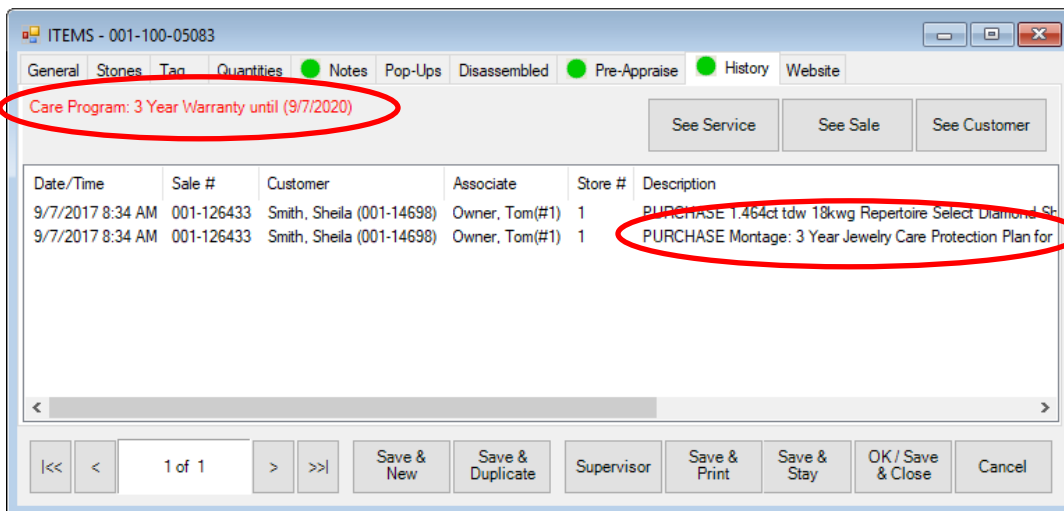
## Customer Record Care Plan Data

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.



## Item Record Care Plan Data

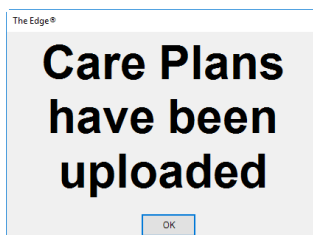
The **History** tab of item records that have care programs on them will show the plan.



## Uploading Transactions

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

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



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

## Printing Terms

When you update your license, terms are stored as PDF files in your shared data folder, for example, C:\ProgramData\AJSLLC\edge\CarePlanTerms. Open them and print as needed.

## 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.

Care Plan Report								9/25/2017	
Sort By: Care Plan Date Sold;								Page 1 of 1	
Customer Name	Sale ID	Date Sold	Who Sold	Care Plan Name	Term	Status	Retail	Cost	
Kyle Bowstring	001-126429	8/14/17	#1: Owner, Tom	Montage: 1 Year Jewelry Care Watch Protection Plan for 1 Years \$34.99 on Item # 505-01446	1 Years	Active	\$34.99		
Sheila Smith	001-126433	9/7/17	#1: Owner, Tom	Montage: 3 Year Jewelry Care Protection Plan for \$579.99 on Item # 100-05083	3 Years	Active	\$579.99		
Sheila Smith	001-126434	9/7/17	#1: Owner, Tom	Montage: 1 Year Jewelry Care Watch Protection Plan for 1 Years \$34.99 on Item # 500-01130	1 Years	Active	\$34.99		
<b>Grand Totals</b>							<b>#3</b>	<b>\$649.97</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 Montage.**



## 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.

Care Plan Task Sku Report						10/9/2017	
Sort By:Care Plan Task Sku;						Page 1 of 1	
Repair #	Customer	Item #	Sku	Desc	Status	TotalCost	Rate
001-126439-001	Smith, Sheila (001-14698)	001-500-01130	WW2008	Refinish Dial	Not Complete	\$0.00	\$0.00
<b>Grand Totals</b>						<b>1</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.

## FAQs

**Question:** New watches come with a manufacturer warranty, so would this be for older watches? Or does this offer something more than a warranty would cover?

**Answer:** The Care Plan covers scratches, dents, movement, etc.. Also, each customer gets a free strap/bracelet replacement for any brand of watch per each year for the term of their plan. Therefore, if they had a five-year plan, the customer would be able to receive five new bands/straps (regardless of the band or strap).

**Question:** Can we decide to give away the Care Plan at point of sale? Do we simply change price to zero?

**Answer:** Yes. You control the price of the Care Plane. You can give it away or change the price. The cost to you for the plan remains the same.

**Question:** How much of the regular retail repair pricing are we reimbursed?

**Answer:** There is a schedule of reimbursements that you will be sent.

**Question:** If they customer doesn't have an email or refuses to give it, can we use a store email?

**Answer:** There has to be an email on the customer record.

**Question:** If we normally just print the receipt, will the Care Plan document print immediately after the receipt or do we need to go back in to print the Care Plan separately?

**Answer:** If the option to print directly is selected for receipts, when you print a window will pop open for each agreement that has been sold. You can decide to print the agreements or close the window(s).

**Question:** Is it possible to incorporate custom work into the care program?

**Answer:** There is currently no way to do that in The Edge.

**Question:** Can you sell the plan after the sale? For example, when customer is picking up an item?

**Answer:** For layaway, special orders and memo outs, the Care Plan is sold at pickup.

**Question:** How are costs to repair/replace paid? By whom?

**Answer:** If the store is repairing the item, Montage will reimburse the store based on the schedule of repair reimbursements. If you are using a Montage repair depot, montage pays the repair depot.

**Question:** Does the receipt show how much the customer saves on each repair?

**Answer:** Currently it does not. This is a planned enhancement. (However, Montage can provide sample marketing materials to illustrate proposed savings.)

**Question:** What is covered?

**Answer:** Please see the Montage document MJC-Program Overview.

**Question:** Does the watch portion cover Rolex overhauls?

**Answer:** Yes.

**Question:** Is there any requirement for customers come in for inspection on a regular basis?

**Answer:** Montage does not require regular inspections.

**Question:** Can the plan be offered on a layaway?

**Answer:** Yes, when the item is picked up.

**Question:** How often does Montage reimburse the retailer?

**Answer:** Depends on the situation; it is usually within 30 days.

**Question:** Would it cover ring sizing up at purchase?

**Answer:** It does not cover the initial sizing. It will cover one sizing any time after that.

**Question:** Do we get reimbursed the retail amount for the repair?

**Answer:** There is a schedule of reimbursements that you will be sent.

**Question:** If an item is returned later, is there a refund for the program?

**Answer:** Care plans are fully refundable in The Edge within the first 30 days. After 30 days, the item can be refunded from The Edge, but the customer must call Montage for a pro-rated refund of the Care Plan.

**Question:** How are the jewelers certified to sell Care Plans?

**Answer:** Jewelers do not need to be certified in order to sell the plans. Montage only requires each jeweler to sign our retailer agreement to sell Care Plans on our behalf.

**Question:** Is there an incentive to offer employees for selling this program?

**Answer:** You can offer a percentage of the Care Plan as commission or a flat rate for commission for each Care Plan sold.

**Question:** Are the plans and pricing on Montage site. Is there also information on what is covered?

**Answer:** Montage will provide separate plan pricing and coverage overviews.

**Question:** What are the options if we do not use in house jeweler; where would repair go?

**Answer:** Montage will supply a list of approve repair depots.

**Question:** Does the Care Plan agreement need to be printed on plain paper or The Edge receipt?

**Answer:** Plain paper. When printing from the agreement screen, it will ask you what printer to print to.

**Question:** Is there coverage for diamond replacement? Lost items? Stolen?

**Answer:** The Care Plan will cover replacement or reimbursement for a lost stone due to accidental damage or a manufacturer defect. The Care Plan will not replace or reimburse for lost or stolen merchandise.

**Question:** How will QuickBooks integration work with this with the funds that come in to pay for warranty repairs?

**Answer:** There is a new option in the QuickBooks setup that will let you point it to the correct QuickBooks account.

**Question:** Can Care Plans be added after the purchase?

**Answer:** You would need to refund and resell the item in The Edge.

**Question:** Can a store sign up to sell the program but not do the repairs?

**Answer:** Yes. Repairs would be sent to a Montage approved repair depot.

**Question:** Do the customers get automatic emails to remind them to bring in to have their pieces checked?

**Answer:** Montage does not require scheduled inspections. However, Montage can supply this feature if we have collected the appropriated information and permission.

**Question:** Does it cover watch crystal replacement?

**Answer:** Yes

**Question:** What would be a few common examples of stuff that would not be covered for jewelry?

**Answer:** Lost, stolen, theft, fire, or intended damage.

**Question:** How will we invoice Montage for Care plan covered repairs?

**Answer:** All repairs need to be reported through the Montage website before the repair is processed. Montage will reimburse each retailer back based on our repair agreement schedule.

**Question:** Is payment for repairs paid to the store or the vendor that did the repair?

**Answer:** If the store has a shop, the store is reimbursed. If the store is using an approved repair depot, the repair depot is paid.

**Question:** The state of Texas (and most states) has requirements about selling insurance. How does montage deal with that?

**Answer:** This is not insurance. It is truly a service plan and Montage and its underwriter assumes all the risk and compliance of the plans offered and sold.

**Question:** If the ring was accidentally stepped on and squished, most diamonds fell out, would replacement of ring and resetting stones be covered?

**Answer:** Yes.

**Question:** How long do repairs take at the depot?

**Answer:** There are many factors that will determine the length of time. Within 30 days in most cases.

**Question:** Is there a maximum of number of claims that can be replaced in a year?

**Answer:** No.

**Question:** I assume there is NO outside cost from The EDGE or Montage to get started with the program up. Correct? We simply pay Montage their share of each plan sold (or given away).

**Answer:** Correct! There are no costs to sign up or offer the Care Plans. You only pay Montage for the plans you use.

**Question:** Can we sell the Care Plan on previously purchased merchandise?

**Answer:** No. You would need to refund and resell the item in The Edge.

**Question:** If I don't repair the item in house, can I send it to my local jeweler?

**Answer:** They would need to be an approved Montage repair center.

**Question:** Can a customer extend a warranty when it runs out?

**Answer:** No.

**Question:** Is the watch strap/bracelet per year included even with Rolex?

**Answer:** Yes.

**Question:** Are there any plans available for items that were not purchased in our store?

**Answer:** Not through The Edge.

**Question:** What is the cost of the lifetime warranty on jewelry?

**Answer:** It depends on the item being sold. Montage can supply this information.

**Question:** How long has Montage been in business?

**Answer:** 40 years.

**Question:** Is this program available to Canadian jewelers?

**Answer:** Not currently.

**Question:** Does this typically replace a jewelers' basic warranty?

**Answer:** It does not. However, it goes above and beyond the basic warranty.

**Question:** What if the customer buys an item November 1 and gives it at Christmas, but then their wife returns it.

**Answer:** They would need to call Montage for a prorated refund after 30 days.

**Question:** Is there a brochure that shows things covered for watches and jewelry that would be simple enough to show a customer?

**Answer:** Yes. Montage will supply this.

**Question:** If we want to proceed, what is our next step?

**Answer:** Contact Andre at Montage Email: [andre.kwasnik@montagefs.com](mailto:andre.kwasnik@montagefs.com)

**Question:** What if they decide to add the plan a few days later?

**Answer:** You would refund the sale in The Edge and resell it.

**Question:** How does a jeweler get certified to perform Care Plan work?

**Answer:** No certification is required to perform Care Plan repairs. You will need to fill out the Jeweler Self Service Addendum.

**Question:** Do you have a service center near Seattle?

**Answer:** Not currently.

**Question:** Can you replace name brand watch bands?

**Answer:** Yes.

**Question:** Can you delay the start date of the plan on gifts?

**Answer:** No. Plans start at time of sale.

**Question:** Do you offer rush job and is there an additional cost?

**Answer:** Rush jobs are available. There is no additional cost.

**Question:** In the case of a lost major diamond do to accidental damage, are you replacing the diamond or reimbursing?

**Answer:** It can be either. It is based on the customers' requirements.

**Question:** Could you return an item and resale with Montage after Christmas?

**Answer:** Yes.

**Question:** Is shipping covered both ways to the repair center?

**Answer:** Yes.