Custom Job Items

Introduction

The Edge features the ability to create **Custom Items** for finished custom jobs. This is an optional feature that is **off** by default. When enabled, the **Custom Item** will be created automatically when the job is marked **Done**.

This allows you to:

- Use **Join Item** at POS to combine multiple items and pick ups into one piece.
- Attach **Care Plans** to custom job items.
- Offer **Insurance Quotes** on custom job items.

System Options

There is one system option for **Custom Items**.

Custom Item on Job Done	Whether to create a custom item when the job is marked **Done**. Options include **Automatically Create** or **Do not Create**.

> 🗒️ **NOTE: This option is OFF by default and must be enabled to use this feature.**

Setup

In order to create **Custom Job Items,** you must have at least one vendor setup with the **My Brand** box enabled. To do so:

1. Click **Inventory > Vendors** and **Find** or **Add** a vendor record.
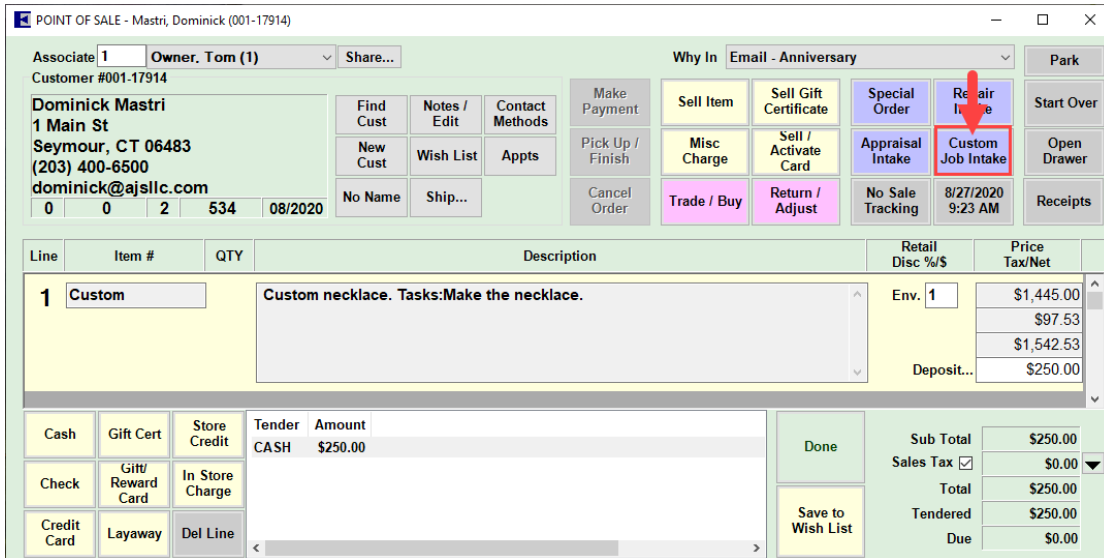2. Check the **My Brand** box.

> 🗒️ **NOTE:** You will not be able to create **Custom Job Items** unless you have a vendor setup with the **My Brand** box enabled.
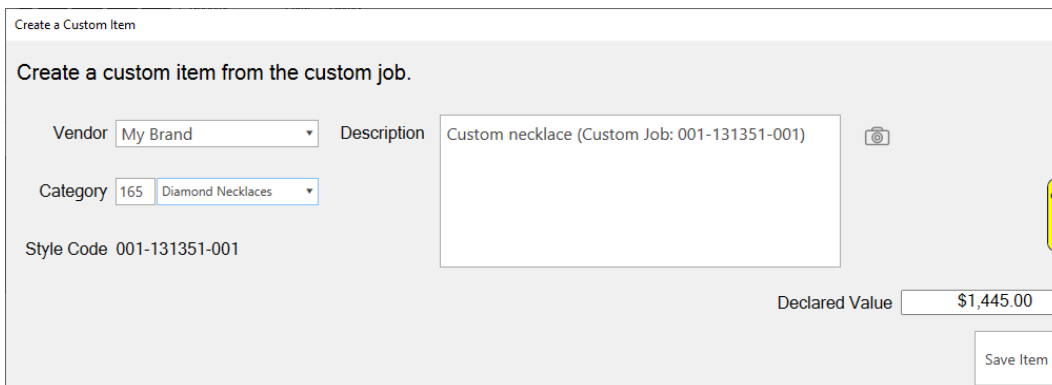
Creating Custom Job Items

To create a **Custom Job Item**:

1. Complete the **Custom Job Intake** at **POS**.

2. Complete the job and mark it **Done**. There are 4 ways to do this from the main Edge menu:

    i. Click **Services > Done** and enter/scan the job envelope or all the individual tasks.

    ii. Click **Services > Find > Job,** enter criteria to find the job, and fill in the **Done** date.

    iii. Click **Services > Find > Job**, enter criteria to find the job, and mark all tasks completed.

    iv. Click **Services > Move Envelope** and move the job to a location that has the 'Moving a Job to this location marks it as done' box checked.

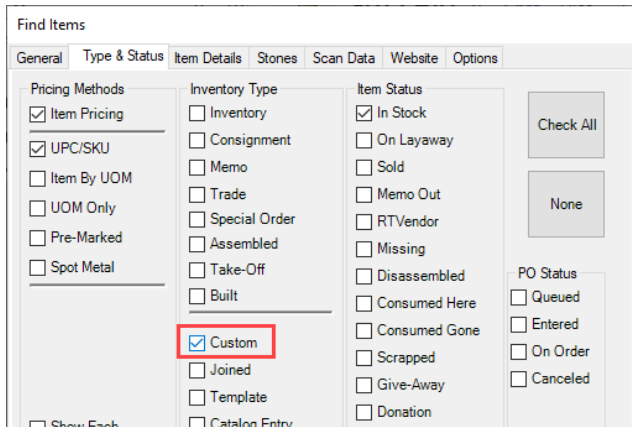3. The **Create Custom Item** window will automatically appear.

4. Select the **Vendor** and **Category** for the item. Optionally, update the **Description**, **Image**, and **Declared Value**.
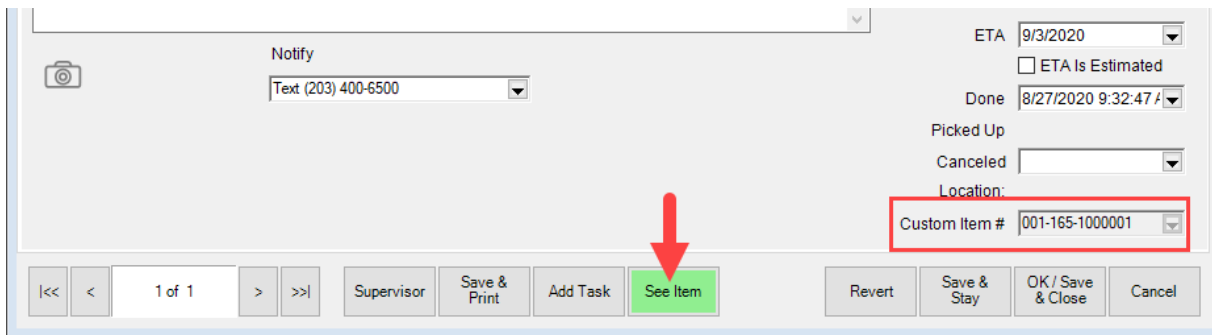
5. Click **Save Item**.

> **NOTE:** The default **Declared Value** will be the sum of all tasks on the job. Changing it on the item record will **not** change any values on the original job. The value from the item record is used for **Care Plan**, **Insurance**, **Appraisal**, and **Repair** purposes.

Editing Custom Items

Items created from custom jobs can be found and edited like other items. You will see **Custom** as an option on the inventory filter **Type & Status** tab.

Additionally, the **Custom Job** will retain a link to the item at the bottom.

Custom Items can be edited, but there are some restrictions:

- **Vendor Style** cannot be changed. This will always be the **Custom Job** number.
- **Cost** cannot be changed. This is derived from the **Custom Job**.
- **Stock Type** cannot be changed and must remain **Custom**.
- The **Pricing Method** cannot be changed.

Custom Items at POS

When picking up a **Custom Job** that has a **Custom Item** linked to it, the item will automatically appear.

From here it is possible to attach a **Care Plan** or **Insurance Quote**.

Additionally, the **Custom Item** will be available when using the **Join Item** feature to combine multiple items into one piece.

Create a Joined Item

Join multiple items together to create a joined item.

001-190-00612	Loose Diamond 0.56Ct Round Treated Light Blue Si1 Diamond	$1,345.00	⊗
001-165-1000001	Custom necklace (Custom Job: 001-131351-001)	$1,445.00	⊗

Vendor My Brand

Category 165 Diamond Necklaces

Suggest

Description Custom necklace (Custom Job: 001-131351-001) Loose Diamond 0.56Ct Round Treated Light Blue Si1 Diamond

Selling Price $2,790.00

Add Items From POS

Save Item   Cancel

See the **Join Item** document and video for more information on using this feature.

Custom Item Reporting

Custom Items can be included on reports.

Category 165: Diamond Necklaces

Store #1

MY:001-131351-001 001-165-1000001	Custom Sold	Custom necklace (Custom Job: 001-131351-001)	0	0.00
	Store #1		1	0	0.00
	Category 165: Diamond Necklaces		1	0	0.00

NOTE: Sold **Custom Items** will appear as $0 on reports. These figures are included in **Service** reports and do not impact **Inventory** report figures as this would lead to duplication when comparing reports.