



INVENTORY COMMITTEE GUIDELINES

ABSTRACT

These Guidelines are designed to provide consistency in our Inventory system, insure that data is entered correctly and insure that artists get paid for their sold artwork.

December 25, 2018

INVENTORY COMMITTEE GUIDELINES

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1. Overview

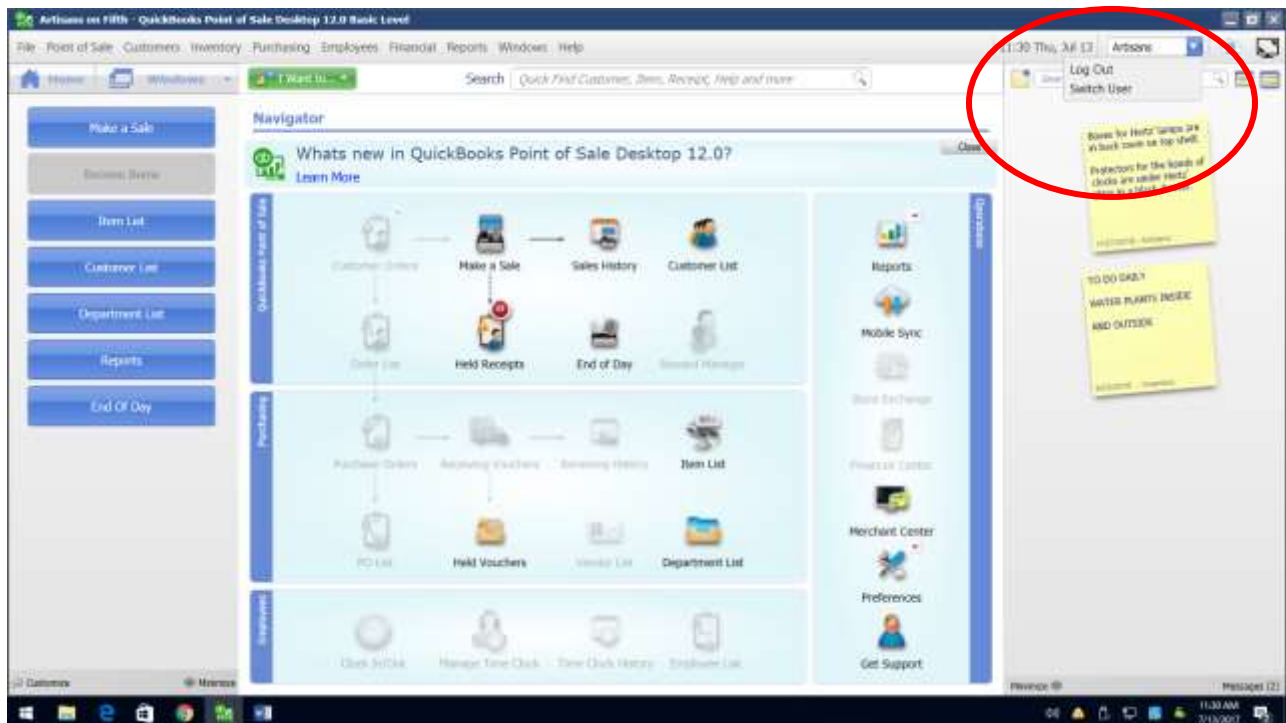
Artisans on fifth uses a point-of-sale computer system for inventory of all items sold in the shop. Each item must be entered manually into the inventory system and a price tag printed and attached to the item, before it can be put on the sale floor. Certain Associates, on the Inventory Committee, have been trained and given the password to access the inventory system. They are the only people who may use this procedure. There must not be any duplication of Item Names in this system. The 3-letter initials for the artist cannot be duplicated.

2. New Associate or Consignor

- a. The **Finance Committee** must add the new Associate or Consignor as a Vendor and set up their 3-letter Item Name Code before Inventory Committee can enter the inventory in the POS system. This is not done until a contract is signed and money is paid.
- b. Once the Finance Committee has set up the new Vendor, this procedure can be followed to add the inventory for the new member.

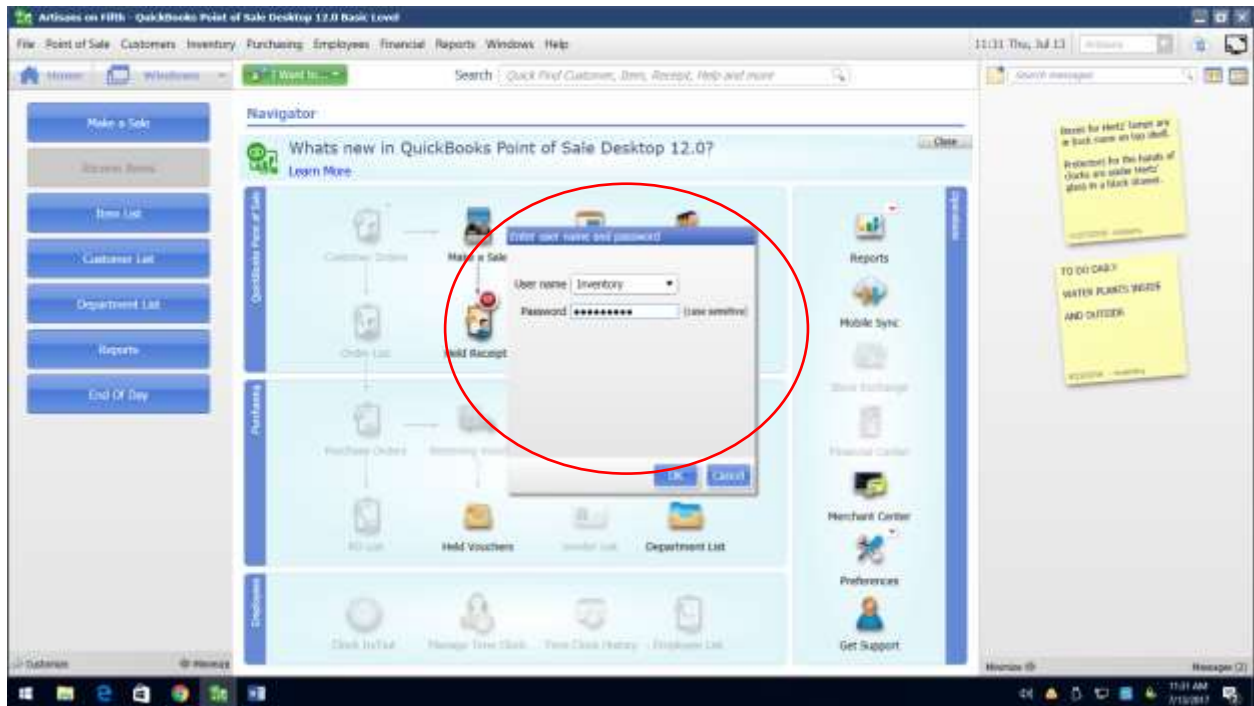
3. Logging In

- a. Associates who are on the Inventory Committee and have been trained on how to use it will be given the password.
- b. Select the pull-down box in upper right corner that should say “Artisans”, then “Switch User”



- c. Select “Inventory” and enter the password.

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4. Price Tag Information

a. The price stickers (tags) look like this. They are comprised of several parts:

- 1) MDH = Artist's initials/3-letter code. This is part of the Item Name with a space after initials
- 2) MDH 25 = This is the full Item Name assigned by Inventory Team. It is the assigned initials followed by a space then price or other identifier (See "Item Name" for instructions).
- 3) \$25.00 = Price the item is to be sold for
- 4) 11513 = System-generated Item Number with corresponding bar code.



5. Search for Existing Item

a. It is very important to not duplicate Item Names. To prevent a duplicate from being entered into the system, enter in the Search box the Item Name from the Inventory Entry Form to see if it is already in the system. This search is very specific, so if a space was entered previously and you search for an Item Name without the space, it will not find it.

- 1) This illustrates a search for all Item Names for a specific artist whose initials are MDH (Gwen and Mike Hertz) that start with "4".

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Item #	Item Name	Department	Vendor Name
11427	MDH 40	Misc	Gwen and Mike Hertz
11421	MDH 4	Misc	Gwen and Mike Hertz
11664	MDH 49	Misc	Gwen and Mike Hertz
11663	MDH 45	Misc	Gwen and Mike Hertz

- 2) If it is in the POS system, determine from the Inventory Entry Form if the artist wants: a new item, a price change or more price tags. Follow the steps below for each request. If they want a New Item, that Item Name cannot be entered again. In this case the Inventory Committee member will have to determine what the Item Name will be. Follow the Guidelines below. Note the new Item Name on the Inventory Entry Form so the artist knows you changed the Name.
- 3) If it is NOT in the POS system, follow the procedure for Adding a New Item with New Item Name.

6. Adding a New Item with New Item Name

- a. **From the TOP menu, select "Inventory".** **Note: Do not use left menu, use the "Inventory" in the TOP menu only.** Selecting "Inventory" from the left menu will cause the new item to be put on Hold, which we do not want.
- b. Select from the left menu "New Item". The Add Inventory Item screen appears.



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- c. **ITEM NAME:** The Item Name is the most important part of this entire process. It is one of the keys to finding records in the inventory system. There are very specific instructions below about how to enter this name. The Item Name is made up of the 3 Letter Artist's Initials plus numbers or letters. Enter a space after the 3 Letter Artist's initials, always use this standard format.

Inventory Chair will speak with all new Artists to determine which option from below will be used. All numbers will be created by the Inventory Committee.

- 1) The **preferred** method for setting up Item Names is Artist's initials followed by a space, then the price of the item (without any description). This may work well for those with large inventories or those who want an even simpler system. For example: AAA 10, AAA 15, AAA 20, etc. depending upon the prices the artist assigns to their artwork. Do not enter cents. Using this method is very easy for the Inventory Committee and for the artist who may need to print more price tags later. These are easy to find and identify in the POS system and are unique Item Names because all the initials are unique.

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- 2) The second option is to use the Artist's initials followed by a space, then the category within each medium with the price as the last part of the inventory number. For example: **Pottery**: AAA Bowl-25, AAA Bowl-50, AAA Cup-15, AAA Cup-18, etc. **Jewelry**: AAA Neck-180, AAA Brac-125, AAA Ear-55, AAA Ear-60, AAA Ear-65, etc. **Wall Art**: AAA F810M-50, AAA F1114NM-65, etc.

The screenshot shows a software window titled "Add Inventory Item". The "Inventory Item Info" section has an "Item Name" field containing "MDH 59" with a red asterisk. The "Basic Info" section includes "Type" (Inventory), "Department" (Jewelry), "Item Description", "Size", "Attribute", "Reg Price" (59.00), "Avg. Unit Cost", "On-Hand Qty" (500), "Tax" (Tax), "UPC", and "Quick Pick Group". The "More Info" section includes "Vendor" (Gwen and Mike Hertz), "Item No." (12184), "ALU", and "Sync to Mobile" (unchecked). The "QuickBooks Options" section includes "COGS" (Artist Consignment Paymer), "Income" (Merchandise Sales), and "Asset" (Inventory Asset). At the bottom are "Save & New", "Save", and "Cancel" buttons.

- d. DEPARTMENT.: The Inventory Committee member will need to determine the correct Dept. that is appropriate for the item being entered. There are many "Departments" that relate to the type of artwork i.e. Photography, Oil Painting, Jewelry – Bracelet etc. This should be on the Inventory Entry Form, but artists don't have access to the full list of Departments, so it is up to the Inventory Committee member to select the correct Department.

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- e. **ITEM DESCRIPTION:** Enter the description the artist put on the Inventory Entry Form. It should be brief. This field is optional.
- f. **SIZE:** This is used only for wall art. Enter the size of the wall art piece that the artist put on the Inventory Entry Form. If there isn't a size, skip it.
- g. **ATTRIBUTE:** Skip this
- h. **REG PRICE:** Enter the regular price the artist has noted on the Inventory Entry Form. Be very careful with this entry to make sure it is accurate so that someone's artwork is sold for the correct price. "00" will automatically be entered if no decimal point is entered. Most prices will be in whole dollars.
- i. **AVG. UNIT COST:** Skip this
- j. **ON-HAND QTY:** Enter 500 always.
- k. **TAX, UPC, QUICK PICK GROUP, ITEM NO. ALU:** Skip all of these.
- l. **VENDOR:** Scroll down the drop-down menu for the artist's name. If the name is there more than once, ask the Treasurer which Vendor name to select. Do not select any names that say "Expense". For artwork by Gwen Hertz, select the Vendor Name "Gwen and Mike Hertz".
- m. Select "Save and Next" at the bottom left corner of the screen to add more inventory items, or "Save" if no more items are to be entered.

7. Price Change for Existing Item

- a. A price change is done when an artist wants to change the price of an item. The artist or cashier may do this themselves and the instructions for doing it are in the Cashier Manual.

The screenshot shows the 'Edit Inventory Item' form. The 'Item Name' field contains 'MDH 49'. Under the 'Basic Info' section, the 'Reg Price' field is highlighted with a red circle and contains the value '49.00'. Other fields include 'Type' (Inventory), 'Department' (Misc), 'Item Description' (Anything \$49), 'Size', 'Attribute', and 'Avg. Unit Cost'.

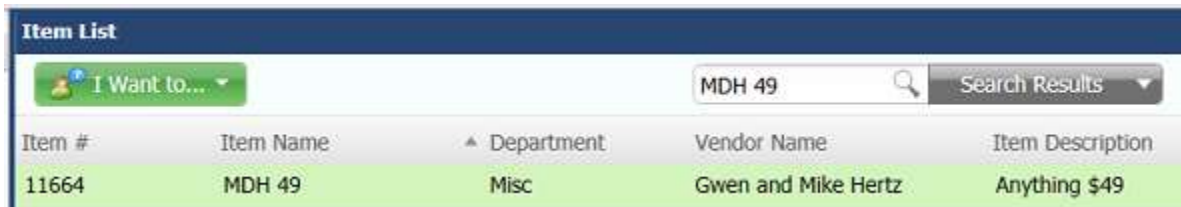
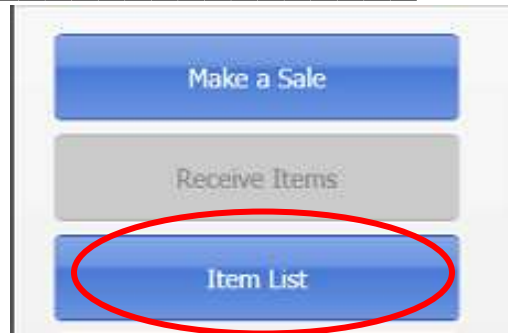
- b. To do this from within the Inventory System, follow the steps above to Search for the item in the system.
 1. Select the desired item.
 2. Select "Edit" from the far right
 3. Select the "Reg Price" and change it to the new price.
 4. Select "Save"



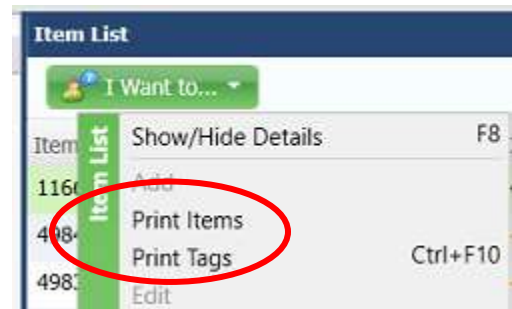
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8. Printing Square Price Tags

- a. Associates can print their own tags for items that have already been entered into the Inventory system. If they are new, the Inventory Committee prints them the first time.
- b. Click on Item List on the Desktop or on the left menu (shown).
- c. In the Search box at the top of the screen, enter the Item Name of the item for which you need a sticker.
- d. A list of your items will be displayed and the desired item should be at the top of the list.
- e. Select the green box that says “I Want to....” and from the list select “Print Tags”.



- f. The Print screen will be displayed as shown below. All of the default settings are correct for printing a standard price sticker.
- g. Enter the number of stickers you need in the “Copies” box. The select “Print”. They will print on the small printer.
- h. If you run out of stickers in the printer, there are more in the supplies box in the back room. If you install the last roll of stickers, add “Price Stickers” to the Office Supplies List.
- i. Install the stickers the same way the previous ones were installed.



9. Item Too Small or Too Numerous for Tag

- a. If the item is too small or numerous for a price tag to be attached, the price tag should be put in the “Price Tag Notebook.” Check to see if the tag is already in the notebook, if not, put it in with a description of the item and the artist’s name. Each artist has their own page(s) in the notebook. When entering inventory for

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items that have their price tags in the notebook, make a note on the Inventory Entry Form for the artist to let him/her know the tag is in the Price Tag Notebook, so they will not be looking for the tags.

Print

Printer

Name: ZDesigner LP 2824 Plus (ZPL) Properties

Status: Ready Calibrate

Type: ZDesigner LP 2824 Plus (ZPL)

Where: USB002

Comment: Print Quality

Print

All - Print all items

Selected - Print only the selected items

Copies

1 Copies

On Hand Quantities

Hide Options

Options

Item Template: Intuit Label (small) Preview Template

Use black bar indexing for jewelry tags [What is this?](#)

Adjust start position for jewelry tags [What is this?](#)

Help Print Preview Cancel

10. Logging Out of the Inventory System

- a. Sales can be done while the computer is set to the “Inventory” user, however when you are finished with the inventory system, you **MUST LOG OUT** of it. Select the drop-down box in the upper right corner that says “Inventory”. “Switch User” then “Artisans”.