PRODUCT FEATURES & LEARNING TIME

PRODUCT FEATURES

TRACK INVENTORY FLOW FOR 150 RAW MATERIALS & 150 FINISHED PRODUCTS

- ✓ COMPREHENSIVE **RAW MATERIAL** INVENTORY SYSTEM

- ✓ **FINISHED PRODUCT** INVENTORY MANAGEMENT

- ✓ DETAILED **ITEMIZED INVENTORY TRACKING** SYSTEM

- ✓ AUTOMATED FINISHED PRODUCT **PRODUCTION** TRACKING

- ✓ INSTANT **INVENTORY CHECK** & EASY **CYCLE COUNTING**

- ✓ **EASY TO FOLLOW** INVENTORY DASHBOARD & **ANALYTICS**

- ✓ AUTOMATED INVENTORY **QUANTITIES & FINANCIAL VALUE**

- ✓ PROFESSIONAL **INVENTORY WORKFLOW** INTEGRATION

- ✓ FIVE INTEGRATED CURRENCIES *(USD, EUR, GBP, CAD, AUD)*

- ✓ BUILT IN **GUIDE NOTES**

DASHBOARD LEARNING & SETUP CURVE

THIS IS OUR **BEST ESTIMATE** OF HOW MUCH TIME IT WILL TAKE THE AVERAGE PERSON TO **LEARN** AND COMPLETE THE **INITIAL SETUP** OF THEIR DASHBOARD

SAVVY ▽   ▽ BEGINNER

| .5HR | 1HR | 2HR | 3HR | 6HR | 12HR |

COMPATIBILITY

SOFTWARE APPLICATION

MICROSOFT EXCEL	GOOGLE SHEETS	APPLE NUMBERS
✓	✗	✗

OPERATING SYSTEMS
- ☑ MICROSOFT WINDOWS
- ☑ MAC OS *PRODUCT WAS BUILT WITH MS EXCEL 365 FOR MAC*

DESKTOP OR LAPTOP
- ☑ **RECOMMENDED:** OUR PRODUCTS ARE OPTIMIZED FOR DESKTOP / LAPTOP USE

MOBILE
- ☑ MICROSOFT 365 SHAREPOINT / ONE DRIVE
- ☑ PHONE OR TABLET WITH EXCEL APP

- *SOME FONTS MAY SHOW UP DIFFERENTLY*
- *BUILT IN GUIDE NOTES*
  - *LOSE SOME OF THEIR FORMATTING THAT HELPS EMPHASIZE KEY POINTS*
  - *NOTE BOXES MAY LOOK SMALL, AND HARD TO READ WITHOUT ZOOMING IN*
- *SOME CELL TEXT MAY APPEAR TO NOT FIT THE CELL WIDTH*

TABS & GUIDES

- ✓ MATERIAL LIST & SUMMARY
- ✓ FINISHED PRODUCT LIST & SUMMARY
- ✓ MATERIAL INVENTORY
- ✓ FINISHED PRODUCT INVENTORY
- ✓ INVENTORY TRENDING
- ✓ INVENTORY DASHBOARD
- ✓ PDF GUIDE

LEARN MORE ✓ ≫ *ETSY LIMITS PRODUCT PHOTOS. LEARN MORE ABOUT THESE ITEMS & FEATURES @ HTTPS://SPREADWISECO.COM*

Enjoy Your Dashboard!

ABOUT THIS GUIDE

GUIDE POINTERS

NEED TO KNOW

NICE TO KNOW

FOR THOSE READY TO JUMP IN QUICKLY

SK YOU CAN SKIP AND COME BACK

DSK DON'T SKIP!

**PASSWORD

- THE FILE PASSWORD IS INCLUDED IN THE FIRST TAB OF YOUR WORKBOOK.
- USE WITH DISCRETION. FORMULAS AND SETUPS CAN BE EXTREMELY COMPLEX, EVEN FOR THE MOST SAVVY SPREADSHEET USERS.

YOUTUBE TUTORIALS

IF THERE ARE YOUTUBE TUTORIALS AVAILABLE FOR THIS PRODUCT, YOU CAN ACCESS THEM BY CLICKING ON THE YOUTUBE LOGO.

FREQUENTLY ASKED QUESTIONS

YOUTUBE TUTORIALS
CLICK THE LOGO TO WATCH OUR SHORT TUTORIALS

▶ Using the Provided Passcode to Unlock Tabs In Your Dashboard

▶ Edit Your Tab Names Without Impacting Workbook Function

▶ Correcting "####" & Other Text Visibility With Column Width Adjustments

▶ Adding Tabs That Will Link to Your Data Table & Dashboard

DSK

THERE IS AN ABOUT TAB IN EVERY WORKBOOK THAT INCLUDES IMPORTANT INFORMATION ABOUT YOUR DASHBOARD, AND USEFUL LINKS.
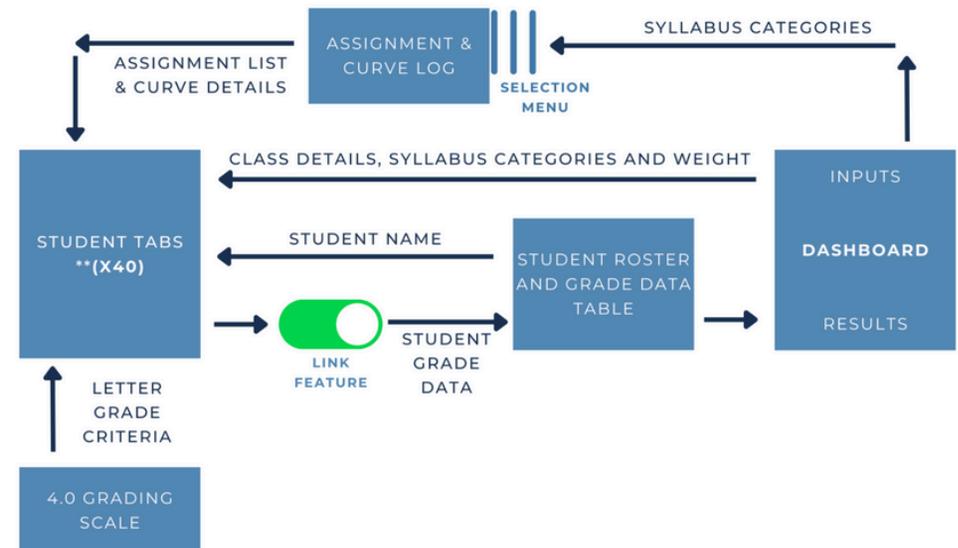
WE PROVIDE A HIGH LEVEL FLOW CHART FOR EVERY TOOL FOR A QUICK REFERENCE OF HOW IT ALL WORKS!

STUDENT GRADEBOOK AND ASSIGNMENT DASHBOARD — REVISION: 4.5

1	Password	Tabs are **locked** to prevent accidental errors to formulas: Password Key: "**swc**"
2	Tool Inputs	**Your Inputs** are the White Boxes With A Border!
3	Tool Inputs	Peach boxes are **drop down menus**
4	PDF Guide	**Use the downloaded guides to help you through the tool. You can Also visit our website anytime to view & download the
5	Site Link	https://spreadwiseco.com/
6	Google Sheets	This Dashboard is Not optimized for use with Google Sheets.
7	Support	**For support, message us on Etsy directly from your order, or send an email to Sales@SpreadWiseCo.com. Pictures are
8	Review	LOVE IT? CLICK & LEAVE US A REVIEW!

TOOL FLOW CHART

SYLLABUS CATEGORIES

ASSIGNMENT & CURVE LOG

SELECTION MENU

ASSIGNMENT LIST & CURVE DETAILS

CLASS DETAILS, SYLLABUS CATEGORIES AND WEIGHT

INPUTS

STUDENT TABS **(X40)

STUDENT NAME

STUDENT ROSTER AND GRADE DATA TABLE

DASHBOARD

RESULTS

LINK FEATURE

STUDENT GRADE DATA

LETTER GRADE CRITERIA

4.0 GRADING SCALE

**DASHBOARD IS PRESET WITH (5) STUDENT TABS. BY SIMPLY MAKING A COPY OF THE TAB, YOU CAN QUICKLY LINK UP TO (40)

DSK

THIS JOURNEY BEGINS WITH FILLING OUT THE DASHBOARD

INVENTORY MANAGEMENT — *My Candle Shop*

Dashboard Inputs

Business Name	Select Your Dashboard Data Date Range		
My Candle Shop		From (mm/dd/yyyy)	1/1/24
Choose Your Currency — USD		To (mm/dd/yyyy)	3/30/24

Dashboard Results

Materials	Received	$	204	Finished Products	Ready	$	420
	Used	$	10		Shipped	$	60

Inventory Check

Materials	Wax	Finished Products	12 oz Candle
Value	$ 56	Value	$ 144
Quantity	53.00	Quantity	12.00

Low Inventory: Check Inventory Values In Inventory Summary

Materials

	Received	Used
Value	204	10

(Chart y-axis: 250, 200, 150, 100, 50, -)

Finished Products

	Ready	Shipped
Value	420	60

(Chart y-axis: 500, 400, 300, 200, 100, -)

Spreadsheets Reimagined — EXPERIENCE THE SPREADWISECO DIFFERENCE

SET YOUR BUSINESS NAME. THIS WILL UPDATE THE BUSINESS NAME IN ALL HEADERS

SET YOUR DATE RANGE FILTERS. THIS WILL FILTER THE DATA ONCE YOU BEGIN TO FILL OUT THE OTHER TABS

SET YOUR CURRENCY. THIS WILL SELECT YOUR CURRENCY TYPE ON ALL TABS

INVENTORY MANAGEMENT

My Candle Shop

Business Name		Select Your Dashboard Data Date Range			
My Candle Shop		From (mm/dd/yyyy)	1/1/24	To (mm/dd/yyyy)	3/30/24
Choose Your Currency	USD				

Dashboard Inputs

Materials	Received	$	204	Finished Products	Ready	$	420
	Used	$	10		Shipped	$	60

Dashboard Results

NOTHING REQUIRED HERE. THIS WILL BEGIN TO POPULATE AS YOU UPDATE THE INVENTORY TRACKING TABS

Materials

Finished Products

DSK
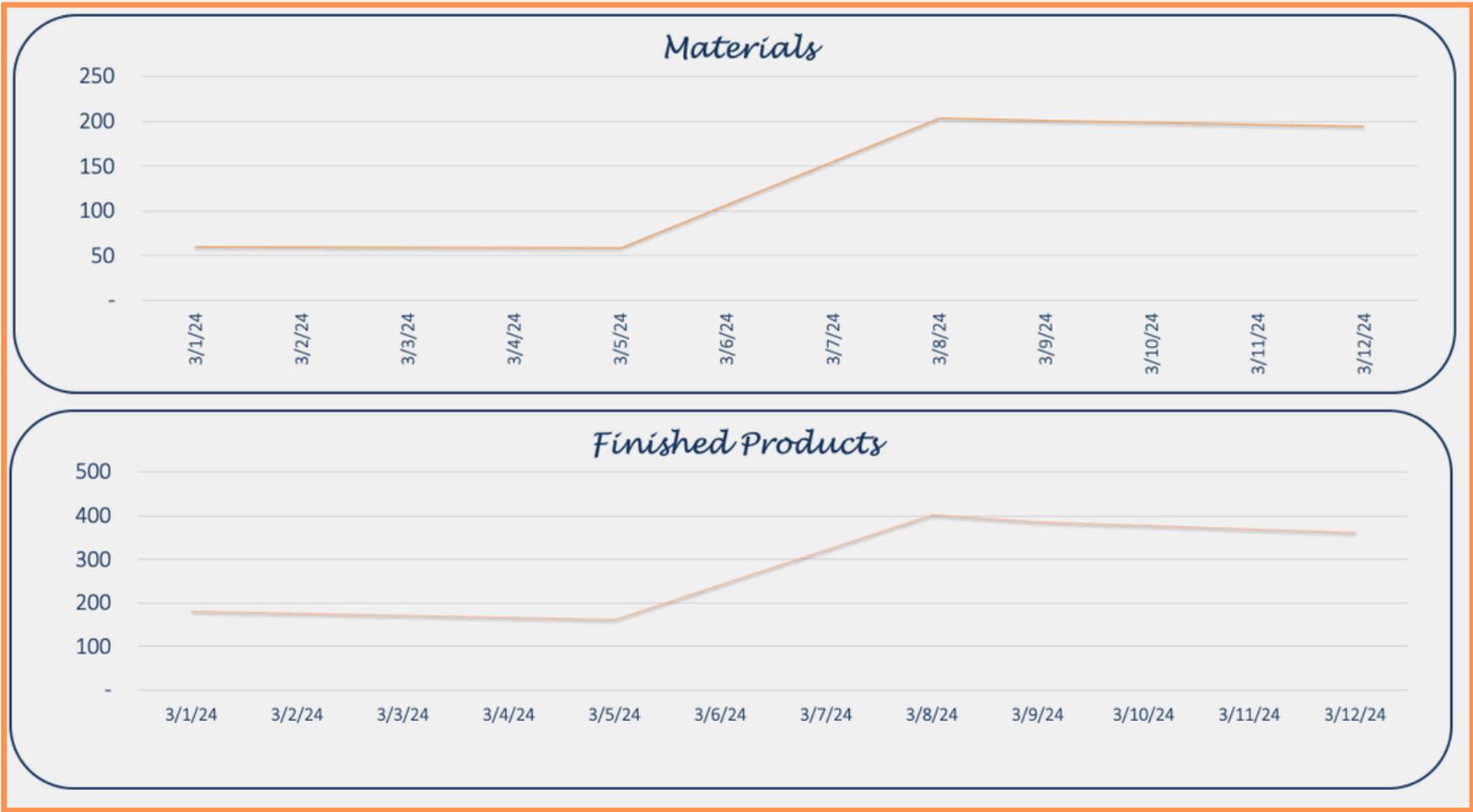
NAME OF MATERIAL

LIST UP TO 150

WHAT TYPE OF UNITS DO YOU PURCHASE THEM IN

WHAT'S THE QUANTITY RECEIVED WHEN PURCHASED?

AUTOMATIC

ACTUAL COST PER QUANTITY UNIT

AUTOMATIC

CURRENT VALUE OF INVENTORY ON HAND

AUTOMATIC

CURRENT QUANTITY OF INVENTORY ON HAND

MATERIAL LIST & SUMMARY

My Candle Shop

USD

Inventory Trigger	Yes

#	Supplier	Attributes	Short Description	Automated Description	Units	Typical Receive Quantity	Cost	Cost Per Quantity	Inventory Value	Inventory Quantity	Trigger Value
1	Key Wax	Low Melt Blue	Wax	Key Wax - Low Melt Blue - Wax	Lbs	50	$ 60.00	$ 1.20	$ 56.40	47.0	50
2			Candle Wick	- - Candle Wick	Ft	100	$ 22.00	$ 0.22	$ -	0.0	10
3			12 oz Glass Jars	- - 12 oz Glass Jars	Ea	12	$ 72.00	$ 6.00	$ 138.00	23.0	20
4			Scent	- - Scent	Pouch	50	$ 15.00	$ 0.30	$ -	0.0	10
5			Labels	- - Labels	Roll	100	$ 22.00	$ 0.22	$ -	0.0	10
6				- -			$ -		$ -	0.0	
7				- -			$ -		$ -	0.0	
8				- -			$ -		$ -	0.0	
9				- -			$ -		$ -	0.0	
10				- -			$ -		$ -	0.0	
11				- -			$ -		$ -	0.0	
12				- -			$ -		$ -	0.0	
13				- -			$ -		$ -	0.0	

NAME OF FINISHED PRODUCT

LIST UP TO 150 DIFFERENT ONES

CURRENT SALE PRICE

THIS IS USED TO DETERMINE THE VALUE OF FINISHED PRODUCTS YOU HAVE

AUTOMATIC

CURRENT VALUE OF INVENTORY ON HAND

AUTOMATIC

CURRENT QUANTITY OF INVENTORY ON HAND

FINISHED PRODUCT LIST & SUMMARY

My Candle Shop

USD

Inventory Trigger	Yes

Attributes	Short Description	Automated Description	Sale Price Per Unit	Inventory Value	Inventory Quantity	Trigger Value
Blue	8 Oz Candle	Blue - 8 Oz Candle	$ 18.00	$ 306.00	17.0	5
	10 Oz Candle	- 10 Oz Candle	$ 24.00	$ -	0.0	10
	16 Oz Table Candle	- 16 Oz Table Candle	$ 30.00	$ -	0.0	
16"	Scent Stick Bundle	16" - Scent Stick Bundle	$ -	$ -	0.0	
		-	$ -	$ -	0.0	
		-	$ -	$ -	0.0	
		-	$ -	$ -	0.0	
		-	$ -	$ -	0.0	
		-	$ -	$ -	0.0	
		-	$ -	$ -	0.0	
		-	$ -	$ -	0.0	
		-	$ -	$ -	0.0	
		-	$ -	$ -	0.0	
		-	$ -	$ -	0.0	

1) FOR BOTH RAW MATERIALS AND FINISHED PRODUCTS, SET AN INVENTORY TRIGGER VALUE.

2.) WHEN THIS VALUE IS REACHED, THE TABLE WILL FLAG THOSE ITEMS AND INVENTORY LEVELS FOR YOU.

YOU WILL ALSO SEE A NOTIFICATION ON YOUR INVENTORY DASHBOARD

FINISHED PRODUCT LIST & SUMMARY | My Candle Shop

USD

Inventory Trigger | Yes

Attributes	Short Description	Automated Description	Sale Price Per Unit	Inventory Value	Inventory Quantity	Trigger Value
Blue	8 Oz Candle	Blue - 8 Oz Candle	$ 18.00	$ 306.00	17.0	5
	10 Oz Candle	- 10 Oz Candle	$ 24.00	$ -	0.0	10
	16 Oz Table Candle	- 16 Oz Table Candle	$ 30.00	$ -	0.0	
16"	Scent Stick Bundle	16" - Scent Stick Bundle	$ -	$ -	0.0	
		-	$ -	$ -	0.0	
		-	$ -	$ -	0.0	
		-	$ -	$ -	0.0	
		-	$ -	$ -	0.0	
		-	$ -	$ -	0.0	
		-	$ -	$ -	0.0	
		-	$ -	$ -	0.0	
		-	$ -	$ -	0.0	
		-	$ -	$ -	0.0	
		-	$ -	$ -	0.0	

WAS THE MATERIAL RECEIVED OR USED?

WHAT WAS THE QUANTITY YOU USED?

SELECT WHICH MATERIAL IT WAS

THIS IS A QUICK SELECTION LIST BASED ON YOUR INVENTORY LIST

DETAILS AND COMMENTS

DATE

MATERIAL INVENTORY | My Candle Shop

Value On Hand	$	-
Received	$	-
Used	$	-

USD

*Initial Setu
*Inventory Corr

| From | 1/1/24 |
| To | 3/30/24 |

Date (MM/DD/YYYY)	Received	Used	Material Inventory Selection	Units	Quantity Received / Used	Cost	Quantity +/-	Running Inventory Quantity	Running Inventory Value	Cumulative Value	Details & Co
3/1/24	Received		Wax	Lbs	50.00	$ 60.00	50.00	50.00	$ 60.00	$ 60.00	Regular Shipment
3/5/24		Used	Wax	Lbs	1.00	$ 1.20	1.00	51.00	$ 61.20	$ 61.20	
3/8/24	Received		12 oz Glass Jars	Ea	24.00	$ 144.00	24.00	24.00	$ 144.00	$ 205.20	
3/9/24		Used	Wax	Lbs	2.00	$ 2.40	2.00	53.00	$ 63.60	$ 207.60	
3/12/24		Used	12 oz Glass Jars	Ea	1.00	$ 6.00	1.00	25.00	$ 150.00	$ 213.60	

UNIT TYPE FOR THAT MATERIAL

VALUE ADDED OR SUBTRACTED FROM INVENTORY

QUANTITY ADDED OR SUBTRACTED FROM INVENTORY

CURRENT VALUE AND QUANTITY OF ON HAND INVENTORY

*SEE STEP 10 FOR MORE DETAILS

CUMALTIVE VALUE OF ALL CURRENT INVENTORY

MATERIAL INVENTORY

My Candle Shop

Value On Hand	$	-
Received	$	-
Used	$	-

| | USD |

| From | 1/1/24 |
| To | 3/30/24 |

| | *Initial Setup |
| | *Inventory Correct |

Date (MM/DD/YYYY)	Received	Used	Material Inventory Selection	Units	Quantity Received / Used	Cost	Quantity +/-	Running Inventory Quantity	Running Inventory Value	Cumulative Value	Details & Comm
3/1/24	Received		Wax	Lbs	50.00	$ 60.00	50.00	50.00	$ 60.00	$ 60.00	Regular Shipment
3/5/24		Used	Wax	Lbs	1.00	$ 1.20	1.00	51.00	$ 61.20	$ 61.20	
3/8/24	Received		12 oz Glass Jars	Ea	24.00	$ 144.00	24.00	24.00	$ 144.00	$ 205.20	
3/9/24		Used	Wax	Lbs	2.00	$ 2.40	2.00	53.00	$ 63.60	$ 207.60	
3/12/24		Used	12 oz Glass Jars	Ea	1.00	$ 6.00	1.00	25.00	$ 150.00	$ 213.60	

WAS THE PRODUCT MADE OR SHIPPED?

WHAT WAS THE QUANTITY YOU MADE / SHPPED?

SELECT WHICH PRODUCT IT WAS

THIS IS A QUICK SELECTION LIST BASED ON YOUR INVENTORY LIST

DATE

DETAILS AND COMMENTS

FINISHED PRODUCTS

My Candle Shop

Value On Hand	$	-
Received	$	-
Used	$	-

USD

| From | 1/1/24 |
| To | 3/30/24 |

*Initial Setup
*Inventory Correc

Date (MM/DD/YYYY)	Ready	Shipped	Finished Product Selection	Quantity Ready / Shipped	Value		Quantity +/-	Running Inventory Quantity	Running Inventory Value		Cumulative Value		Details & Comm
3/1/24	Ready		12 oz Candle	10	$	180.00	10.00	10.00	$	180.00	$	180.00	
3/5/24		Shipped	12 oz Candle	1	$	18.00	1.00	11.00	$	198.00	$	198.00	
3/8/24	Ready		16 oz Candle	10	$	240.00	10.00	10.00	$	240.00	$	438.00	
3/9/24		Shipped	12 oz Candle	1	$	18.00	1.00	12.00	$	216.00	$	456.00	
3/12/24		Shipped	16 oz Candle	1	$	24.00	1.00	11.00	$	264.00	$	480.00	

VALUE ADDED OR SUBTRACTED FROM INVENTORY

QUANTITY ADDED OR SUBTRACTED FROM INVENTORY

CURRENT VALUE AND QUANTITY OF ON HAND INVENTORY

*SEE STEP 10 FOR MORE DETAILS

CUMALTIVE VALUE OF ALL CURRENT INVENTORY

FINISHED PRODUCTS

My Candle Shop

Value On Hand	$	-
Received	$	-
Used	$	-

USD

*Initial Setup
*Inventory Correc

| From | 1/1/24 |
| To | 3/30/24 |

Date (MM/DD/YYYY)	Ready	Shipped	Finished Product Selection	Quantity Ready / Shipped	Value	Quantity +/ -	Running Inventory Quantity	Running Inventory Value	Cumulative Value	Details & Comm
3/1/24	Ready		12 oz Candle	10	$ 180.00	10.00	10.00	$ 180.00	$ 180.00	
3/5/24		Shipped	12 oz Candle	1	$ 18.00	1.00	11.00	$ 198.00	$ 198.00	
3/8/24	Ready		16 oz Candle	10	$ 240.00	10.00	10.00	$ 240.00	$ 438.00	
3/9/24		Shipped	12 oz Candle	1	$ 18.00	1.00	12.00	$ 216.00	$ 456.00	
3/12/24		Shipped	16 oz Candle	1	$ 24.00	1.00	11.00	$ 264.00	$ 480.00	

DSK

AS A SPECIFIC MATERIAL IS ADDED OR USED, THAT SPECIFIC INVENTORY VALUE IS UPDATED AFTER EACH ROW ENTRY.

THIS ALLOWS YOU TO KNOW EXACTLY WHERE YOU STAND ON MATERIALS AND PRODUCTS AS MAKE EVERY ENTRY!

	Material Inventory Selection	Units	Quantity Received / Used	Cost	Quantity +/-	Running Inventory Quantity	Running Inventory Value	Cumulative Value
	Wax	Lbs	50.00	$ 60.00	50.00	50.00	$ 60.00	$ 60.00
	Wax	Lbs	1.00	$ (1.20)	-1.00	49.00	$ 58.80	$ 58.80
	12 oz Glass Jars	Ea	24.00	$ 144.00	24.00	24.00	$ 144.00	$ 202.80
	Wax	Lbs	2.00	$ (2.40)	-2.00	47.00	$ 56.40	$ 200.40
	12 oz Glass Jars	Ea	1.00	$ (6.00)	-1.00	23.00	$ 138.00	$ 194.40

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