

SB INVENTORY MANAGEMENT DASHBOARD GUIDE

4.0 - 4/1/24



SpreadWiseCo™

Spreadsheets Reimagined

BUILT WITH
MICROSOFT
EXCEL

GUIDE OVERVIEW

These tools are designed to be easy to use, with minimal inputs from you, and many outputs from us. Follow each tool guide closely. There are normally only a few true steps within the guide, but the rest is information to help you along the way.

GUIDE LEGEND


GUIDE POINTERS

NEED TO KNOW

NICE TO KNOW

FOR THOSE READY TO JUMP IN QUICKLY



YOU CAN SKIP AND COME BACK 



DON'T SKIP!

USER INPUTS

INPUT BOX

DROP DOWN MENU

REVISION INFORMATION

Latest Inventory Management
Dashboard Revision: 4.0

PASSWORD

- Tabs are locked to prevent accidental formula errors. Password: "swc"
- Use with discretion. Formulas and setups are extremely complex.

1 - GETTING STARTED



THIS JOURNEY BEGINS WITH FILLING OUT THE DASHBOARD

INVENTORY MANAGEMENT				<i>My Candle Shop</i>															
<i>Dashboard Inputs</i>	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																
<i>Dashboard Results</i>	Materials	Received	\$ 204	Finished Products	Completed	\$ 420													
		Used	\$ 10		Shipped	\$ 60													
<i>Inventory Check</i>	Materials	Wax		Finished Products	12 oz Candle														
	Value	\$	56	Value	\$	144													
	Quantity	47.00		Quantity	8.00														
<p><i>Materials</i></p> <table border="1"> <caption>Materials Data</caption> <thead> <tr> <th>Category</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>Received</td> <td>204</td> </tr> <tr> <td>Used</td> <td>10</td> </tr> </tbody> </table>				Category	Value	Received	204	Used	10	<p><i>Finished Products</i></p> <table border="1"> <caption>Finished Products Data</caption> <thead> <tr> <th>Category</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>Completed</td> <td>420</td> </tr> <tr> <td>Shipped</td> <td>60</td> </tr> </tbody> </table>				Category	Value	Completed	420	Shipped	60
Category	Value																		
Received	204																		
Used	10																		
Category	Value																		
Completed	420																		
Shipped	60																		

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2 - DASHBOARD INPUTS



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*

Dashboard Inputs

Business Name	
My Candle Shop	
Choose Your Currency	USD

Select Your Dashboard Data Date Range			
From (mm/dd/yyyy)	1/1/24	To (mm/dd/yyyy)	3/30/24

Dashboard Results

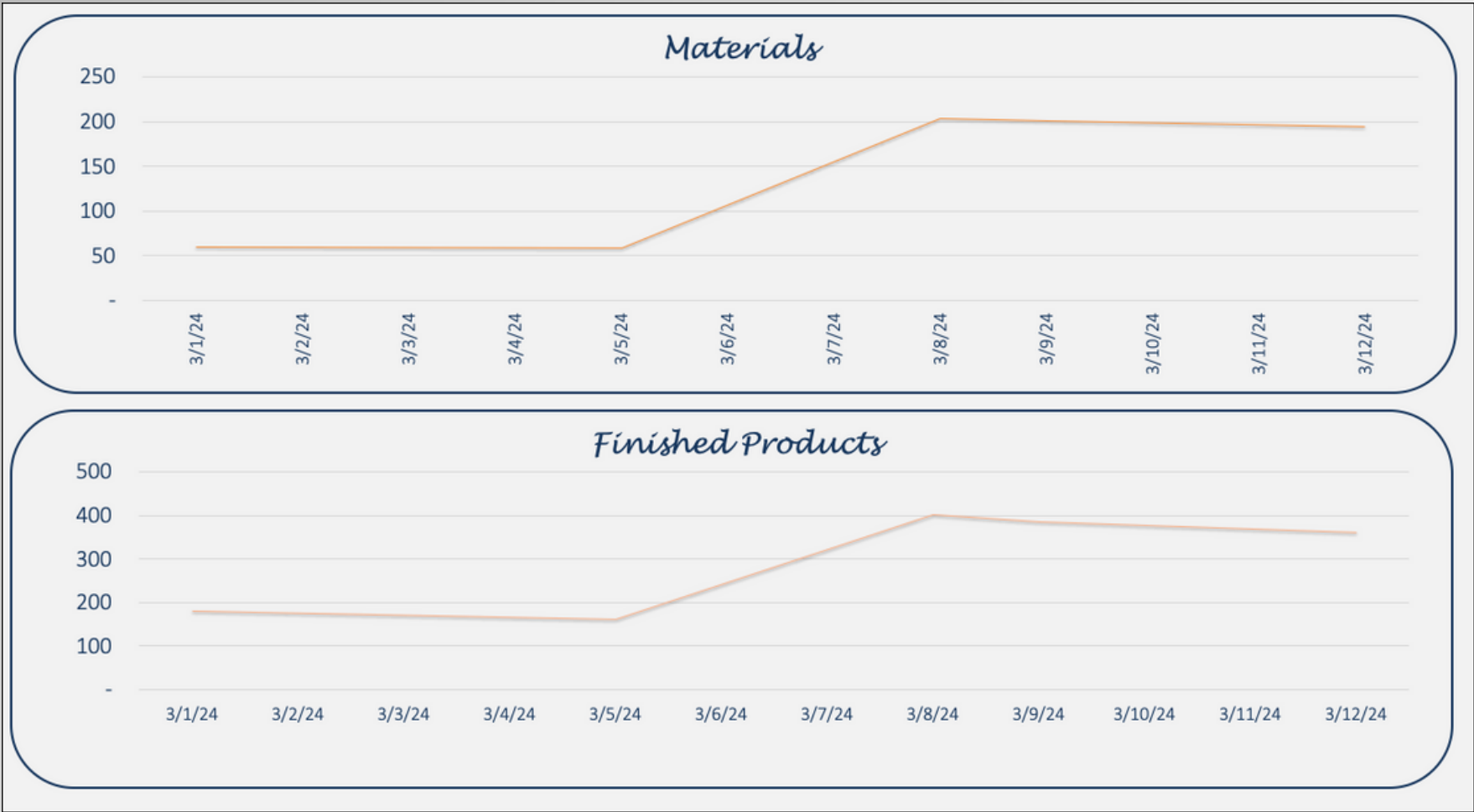
Materials	Received	\$	204	Finished Products	Completed	\$	420
	Used	\$	10		Shipped	\$	60



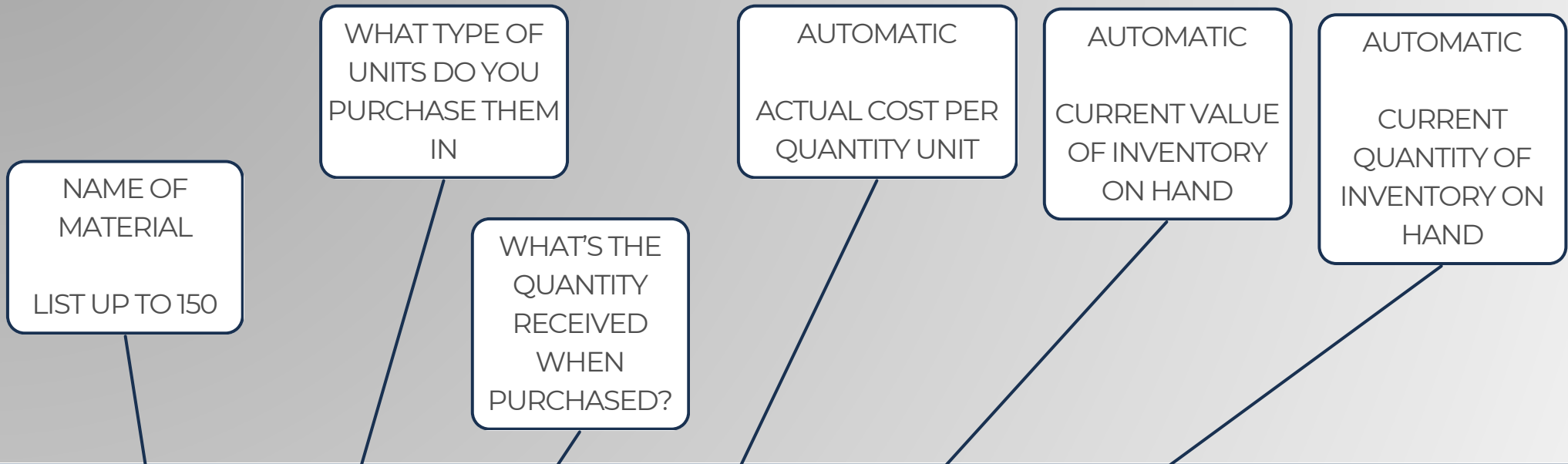
3 - TRENDING



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



4 - INVENTORY - MATERIALS



INVENTORY SUMMARY

My Candle Shop

Choose Your Currency **USD**

#	Material Inventory List	Units	Typical Receive Quantity	Cost	Cost Per Quantity	Inventory Value	Inventory Quantity
1	Wax	Lbs	50	\$ 60.00	\$ 1.20	\$ 56.40	47.00
2	Candle Wick	Ft	100	\$ 22.00	\$ 0.22	\$ -	0.00
3	12 oz Glass Jars	Ea	12	\$ 72.00	\$ 6.00	\$ 138.00	23.00
4	Scent	Pouch	50	\$ 15.00	\$ 0.30	\$ -	0.00
5	Labels	Roll	100	\$ 22.00	\$ 0.22	\$ -	0.00
6				\$ -		\$ -	0.00
7				\$ -		\$ -	0.00
8				\$ -		\$ -	0.00
9				\$ -		\$ -	0.00
10				\$ -		\$ -	0.00
11				\$ -		\$ -	0.00
12				\$ -		\$ -	0.00
13				\$ -		\$ -	0.00
14				\$ -		\$ -	0.00
15				\$ -		\$ -	0.00
16				\$ -		\$ -	0.00

Finished Product List	Sale Price Per Unit	Inventory Value	Inventory Quantity
12 oz Candle	\$ 18.00	\$ 144.00	8.00
16 oz Candle	\$ 24.00	\$ 216.00	9.00
24 oz Candle	\$ 30.00	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00



5 - INVENTORY - FINISHED PRODUCTS

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

INVENTORY SUMMARY

My Candle Shop

Choose Your Currency

USD

#	Material Inventory List	Units	Typical Receive Quantity	Cost	Cost Per Quantity	Inventory Value	Inventory Quantity
1	Wax	Lbs	50	\$ 60.00	\$ 1.20	\$ 56.40	47.00
2	Candle Wick	Ft	100	\$ 22.00	\$ 0.22	\$ -	0.00
3	12 oz Glass Jars	Ea	12	\$ 72.00	\$ 6.00	\$ 138.00	23.00
4	Scent	Pouch	50	\$ 15.00	\$ 0.30	\$ -	0.00
5	Labels	Roll	100	\$ 22.00	\$ 0.22	\$ -	0.00
6				\$ -		\$ -	0.00
7				\$ -		\$ -	0.00
8				\$ -		\$ -	0.00
9				\$ -		\$ -	0.00
10				\$ -		\$ -	0.00
11				\$ -		\$ -	0.00
12				\$ -		\$ -	0.00
13				\$ -		\$ -	0.00
14				\$ -		\$ -	0.00
15				\$ -		\$ -	0.00
16				\$ -		\$ -	0.00

Finished Product List	Sale Price Per Unit	Inventory Value	Inventory Quantity
12 oz Candle	\$ 18.00	\$ 144.00	8.00
16 oz Candle	\$ 24.00	\$ 216.00	9.00
24 oz Candle	\$ 30.00	\$ -	0.00
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	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00
	\$ -	\$ -	0.00



6 - MATERIALS TRACKING



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*

MatInventory	\$	194.40
Received	\$	204.00
Used	\$	(9.60)

Choose Your Currency **USD**

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

Date (MM/DD/YYYY)	Received	Used	Material Inventory Selection	Units	Quantity Received/Used	Cost	Quantity +/-	Running Inventory Quantity	Running Inventory Value	Cummulative Value	Details & Comment
3/1/24	Yes		Wax	Lbs	50.00	\$ 60.00	50.00	50.00	\$ 60.00	\$ 60.00	Regular Shipment
3/5/24		Yes	Wax	Lbs	1.00	\$ (1.20)	-1.00	49.00	\$ 58.80	\$ 58.80	
3/8/24	Yes		12 oz Glass Jars	Ea	24.00	\$ 144.00	24.00	24.00	\$ 144.00	\$ 202.80	
3/9/24		Yes	Wax	Lbs	2.00	\$ (2.40)	-2.00	47.00	\$ 56.40	\$ 200.40	
3/12/24		Yes	12 oz Glass Jars	Ea	1.00	\$ (6.00)	-1.00	23.00	\$ 138.00	\$ 194.40	

7 - MATERIALS TRACKING - AUTOMATIC



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

CUMALTYVE VALUE OF ALL CURRENT INVENTORY

MATERIAL INVENTORY

My Candle Shop

MatInventory	\$	194.40
Received	\$	204.00
Used	\$	(9.60)

Choose Your Currency **USD**

From **1/1/24**
To **3/30/24**

Date (MM/DD/YYYY)
3/1/24
3/5/24
3/8/24
3/9/24
3/12/24

Received	Used
Yes	
	Yes
Yes	
	Yes
	Yes

Material Inventory Selection	Units	Quantity Received / Used	Cost
Wax	Lbs	50.00	\$ 60.00
Wax	Lbs	1.00	\$ (1.20)
12 oz Glass Jars	Ea	24.00	\$ 144.00
Wax	Lbs	2.00	\$ (2.40)
12 oz Glass Jars	Ea	1.00	\$ (6.00)

Quantity +/-	Running Inventory Quantity	Running Inventory Value
50.00	50.00	\$ 60.00
-1.00	49.00	\$ 58.80
24.00	24.00	\$ 144.00
-2.00	47.00	\$ 56.40
-1.00	23.00	\$ 138.00

Cummulative Value
\$ 60.00
\$ 58.80
\$ 202.80
\$ 200.40
\$ 194.40

Details & Comment
Regular Shipment

8 - FINISHED PRODUCTS TRACKING



WAS THE PRODUCT MADE OR SHIPPED?

WHAT WAS THE QUANTITY YOU MADE / SHIPPED?

SELECT WHICH PRODUCT IT WAS
THIS IS A QUICK SELECTION LIST BASED ON YOUR INVENTORY LIST

DETAILS AND COMMENTS

DATE

FINISHED PRODUCTS *My Candle Shop*

Finished Products	\$	360.00
Received	\$	420.00
Used	\$	(60.00)

Choose Your Currency: USD

From: 1/1/24 To: 3/30/24

Date (MM/DD/YYYY)	Completed	Shipped	Finished Product Selection	Quantity Completed / Shipped	Value	Quantity +/-	Running Inventory Quantity	Running Inventory Value	Cumulative Value	Details & Comments
3/1/24	Yes		12 oz Candle	10	\$ 180.00	10.00	10.00	\$ 180.00	\$ 180.00	
3/5/24		Yes	12 oz Candle	1	\$ (18.00)	-1.00	9.00	\$ 162.00	\$ 162.00	
3/8/24	Yes		16 oz Candle	10	\$ 240.00	10.00	10.00	\$ 240.00	\$ 402.00	
3/9/24		Yes	12 oz Candle	1	\$ (18.00)	-1.00	8.00	\$ 144.00	\$ 384.00	
3/12/24		Yes	16 oz Candle	1	\$ (24.00)	-1.00	9.00	\$ 216.00	\$ 360.00	

Built With Microsoft Excel

NOT Optimized For Use With Google Sheets

\$ USD, € EUR, £ GBP



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9 - FINISHED PRODUCT TRACKING - AUTO



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

CUMALTYVE VALUE OF ALL CURRENT INVENTORY

FINISHED PRODUCTS

My Candle Shop

FinishedProducts	\$	360.00
Received	\$	420.00
Used	\$	(60.00)

Choose Your Currency: USD

From: 1/1/24
To: 3/30/24

Date (MM/DD/YYYY)	Completed	Shipped	Finished Product Selection	Quantity Completed / Shipped	Value	Quantity +/-	Running Inventory Quantity	Running Inventory Value	Cumulative Value	Details & Comments
3/1/24	Yes		12 oz Candle	10	\$ 180.00	10.00	10.00	\$ 180.00	\$ 180.00	
3/5/24		Yes	12 oz Candle	1	\$ (18.00)	-1.00	9.00	\$ 162.00	\$ 162.00	
3/8/24	Yes		16 oz Candle	10	\$ 240.00	10.00	10.00	\$ 240.00	\$ 402.00	
3/9/24		Yes	12 oz Candle	1	\$ (18.00)	-1.00	8.00	\$ 144.00	\$ 384.00	
3/12/24		Yes	16 oz Candle	1	\$ (24.00)	-1.00	9.00	\$ 216.00	\$ 360.00	

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\$USD, €EUR, £GBP



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10 - RUNNING INVENTORY VALUE / QUANTITY



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!

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



IMPORTANT

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