ETSY INVENTORY MANAGEMENT GUIDE

4.0 - 8/17/24

SpreadWiseCo™

Spreadsheets Reimagined

BUILT WITH MICROSOFT EXCEL

ABOUT THIS GUIDE

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

SK — YOU CAN SKIP AND COME BACK

DSK — DON'T SKIP!

TOOL USER INPUTS

INPUT BOX

DROP DOWN MENU

**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.

ABOUT TAB

DSK

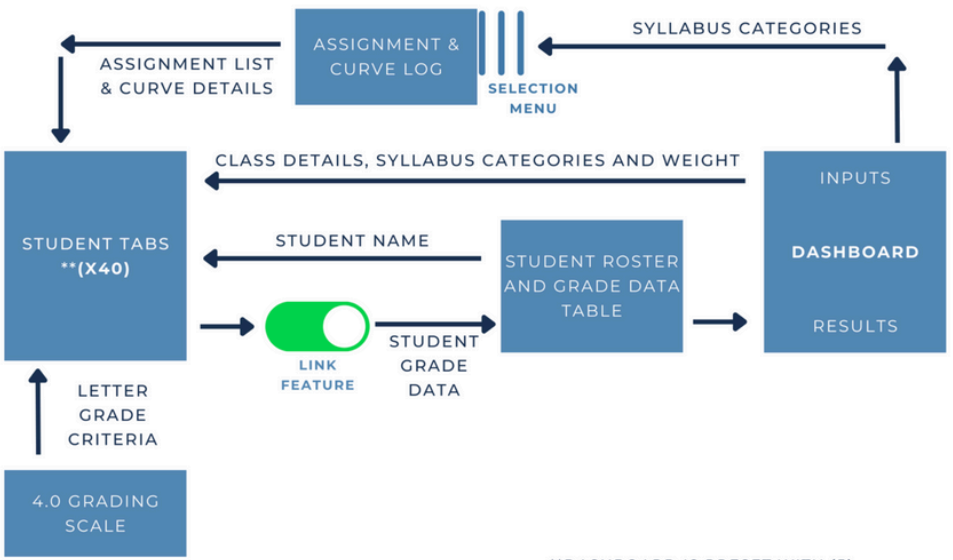
THERE IS AN ABOUT TAB IN EVERY WORKBOOK THAT INCLUDES IMPORTANT INFORMATION ABOUT YOUR DASHBOARD, AND USEFUL LINKS.

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



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PRODUCT SPECIFICATIONS

DSK

BUILT WITH

Microsoft Excel 365

COMPATABILITY

All Microsoft Excel Versions

Not Compatible with Google Sheets

PRODUCT GUIDES

Detailed PDF Guide

Detailed Tool Flow Chart

VIDEO TUTORIALS

Not Yet Available

CURRENCY

$USD
€EUR
£GBP
CAD

Four Integrated Currencies

TABS

- About & Flow Chart
- Inventory Dashboard
- Inventory Trending
- Inventory Summary
- Material Inventory
- Finished Product Inventory

SETUP/LEARNING CURVE

DSK

THIS JOURNEY BEGINS WITH FILLING OUT THE DASHBOARD

INVENTORY MANAGEMENT

My Candle Shop

Dashboard Inputs

Business Name	
My Candle Shop	
Choose Your Currency	USD

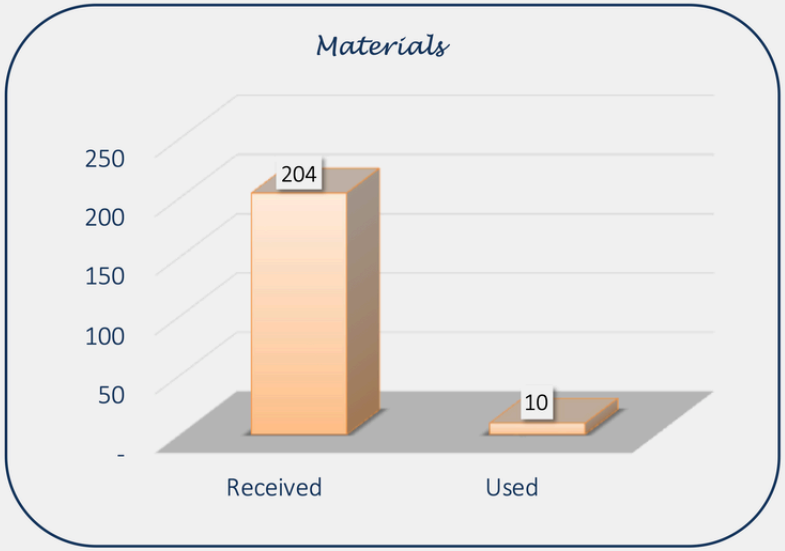
Select Your Dashboard Data Date Range			
From (mm/dd/yyyy)	1/1/24	To (mm/dd/yyyy)	3/30/24

Dashboard Results

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

Inventory Check

Materials	Wax	Finished Products	12 oz Candle
Value	$ 56	Value	$ 144
Quantity	47.00	Quantity	8.00



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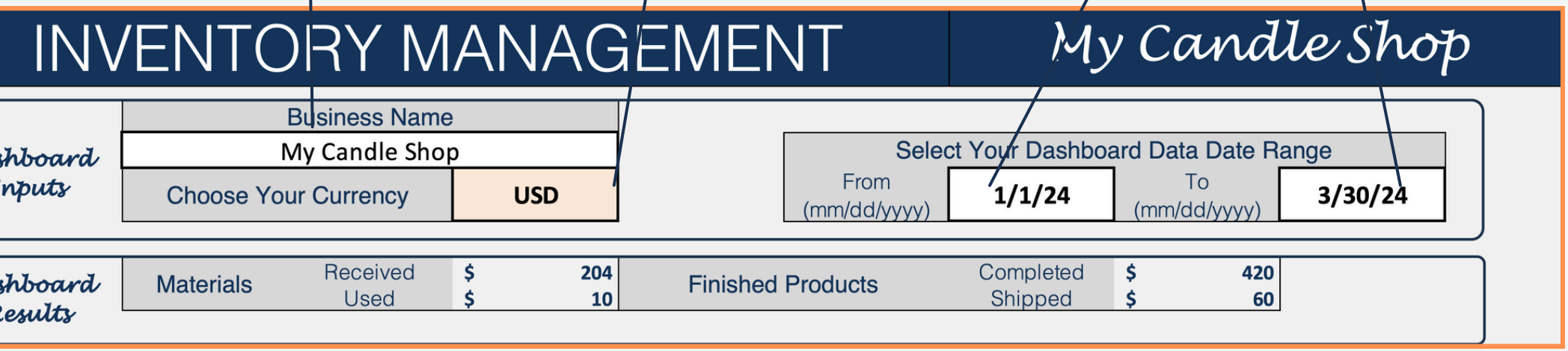
2 - DASHBOARD INPUTS

DSK

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

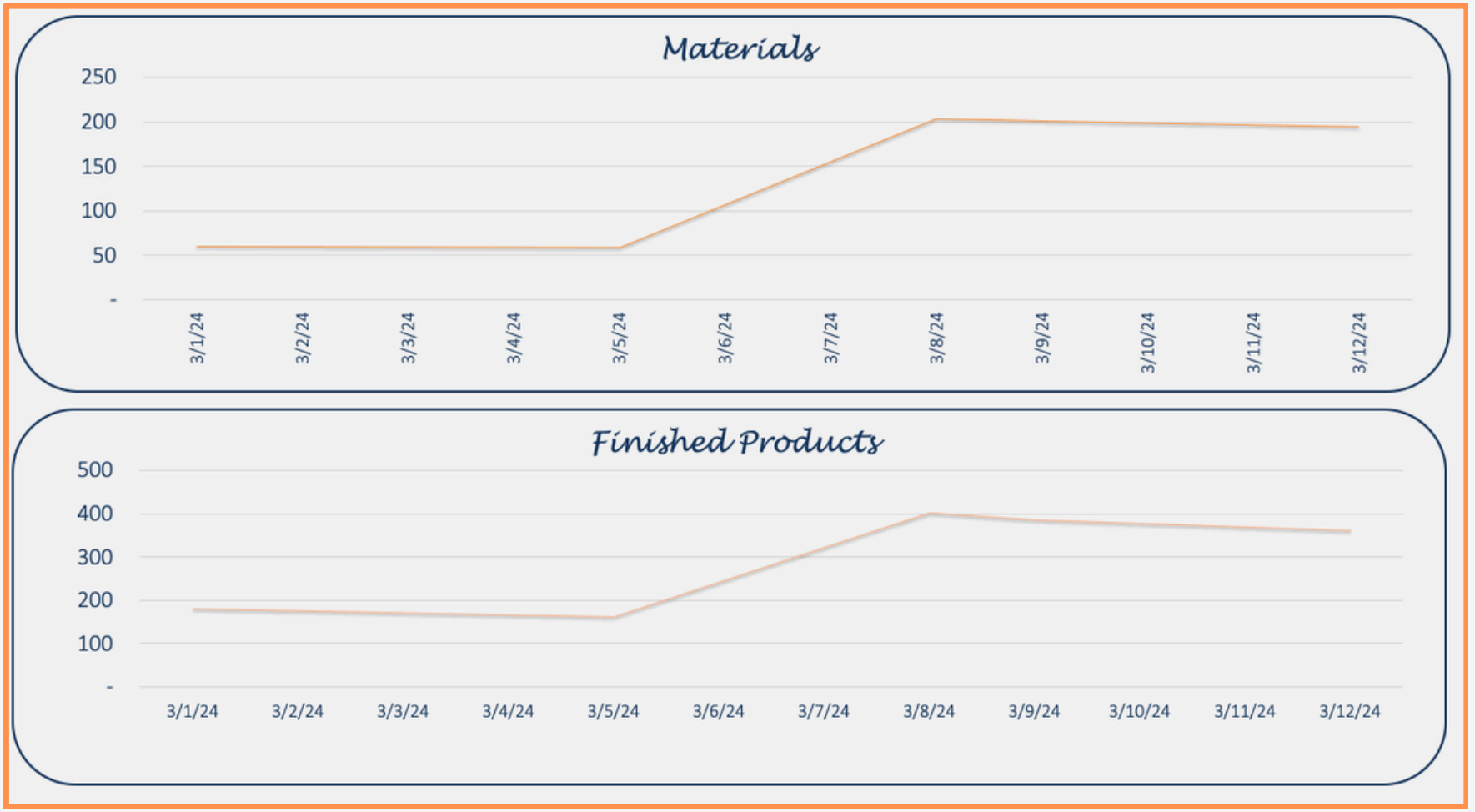
SET YOUR CURRENCY. THIS WILL SELECT YOUR CURRENCY TYPE ON ALL TABS

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



3 - TRENDING

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



4 - INVENTORY - MATERIALS

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

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

5 - INVENTORY - FINISHED PRODUCTS

DSK

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
	$ -	$ -	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

DSK

WAS THE MATERIAL RECEIVED OR USED?

WHAT WAS THE QUANTITY YOU USED?

DATE

SELECT WHICH MATERIAL IT WAS

THIS IS A QUICK SELECTION LIST BASED ON YOUR INVENTORY LIST

DETAILS AND COMMENTS

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)	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

DSK

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

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)	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	

8 - FINISHED PRODUCTS TRACKING

DSK

WAS THE PRODUCT MADE OR SHIPPED?

WHAT WAS THE QUANTITY YOU MADE / SHPPED?

DATE

SELECT WHICH PRODUCT IT WAS

THIS IS A QUICK SELECTION LIST BASED ON YOUR INVENTORY LIST

DETAILS AND COMMENTS

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 & Com
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	

9 - FINISHED PROUDCT TRACKING - AUTO

DSK

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

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 & Com
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	

10 - RUNNING INVENTORY VALUE / QUANTITY

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!

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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