SpreadWiseCo™

Spreadsheets Reimagined

ETSY INVENTORY
MANAGEMENT
GUIDE

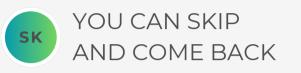5.1 - 1/26/2025

BUILT WITH
MICROSOFT
EXCEL

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.

DOWNLOAD THIS GUIDE ANYTIME AT HTTPS://SPREADWISECO.COM

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 LIST & CURVE DETAILS

ASSIGNMENT & CURVE LOG

SELECTION MENU

CLASS DETAILS, SYLLABUS CATEGORIES AND WEIGHT

INPUTS

STUDENT TABS **(X40)

STUDENT NAME

STUDENT ROSTER AND GRADE DATA TABLE

DASHBOARD

LINK FEATURE

STUDENT GRADE DATA

RESULTS

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)

PRODUCT FEATURES & LEARNING TIME

PRODUCT FEATURES

- LIST OF UP TO **150 RAW MATERIALS**

- LIST OF UP TO **150 FINISHED PRODUCTS**

- AUTO TRACKS **MATERIALS** AS YOU **RECIEVE AND USE** THEM.

- AUTO TRACKS **FINISHED PRODUCTS** AS YOU **MAKE AND SHIP** THEM

- BUILT IN FEATURE TO **QUICKLY CHECK** ANY SPECIFIC **RAW MATERIAL OR FINISHED GOOD INVENTORY** QUANTITY AND DOLLAR VALUE
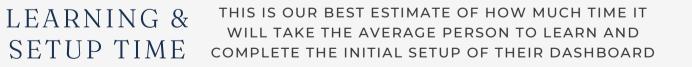
- ABILITY TO **CYCLE COUNT** AND EASILY CORRECT YOUR INVENTORY LEVELS

- **INSIGHT** INTO YOUR INVENTORY AND FINISHED GOODS **USAGE**

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

- BUILT IN **GUIDE NOTES**

LEARNING & SETUP TIME

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

15MIN	30MIN	45MIN	1HR	1.5HR	2HR

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

- ✓ INVENTORY SUMMARY
- ✓ INVENTORY TRENDING
- ✓ PDF GUIDE
- ✓ MATERIAL INVENTORY
- ✓ INVENTORY DASHBOARD
- ✓ TOOL FLOW CHART
- ✓ FINISHED PRODUCT INVENTORY

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

Enjoy Your Dashboard!

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 | 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

250	
200	204
150	
100	
50	
-	10
	Received Used

Finished Products

500	
400	420
300	
200	
100	60
-	
	Ready Shipped

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

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*

USD

Inventory Trigger **Yes**

#	Material Inventory List	Units	Typical Receive Quantity	Cost	Cost Per Quantity	Inventory Value	Inventory Quantity	Trigger Value	Finished Product List	Sale Price Per Unit	Inventory Value	Inventory Quantity	Trigger Value
1	Wax	Lbs	50	$ 60.00	$ 1.20	$ 56.40	47.0	50	12 oz Candle	$ 18.00	$ 144.00	8.0	5
2	Candle Wick	Ft	100	$ 22.00	$ 0.22	$ -	0.0	10	16 oz Candle	$ 24.00	$ 216.00	9.0	10
3	12 oz Glass Jars	Ea	12	$ 72.00	$ 6.00	$ 138.00	23.0	20	24 oz Candle	$ 30.00	$ -	0.0	
4	Scent	Pouch	50	$ 15.00	$ 0.30	$ -	0.0	10		$ -	$ -	0.0	
5	Labels	Roll	100	$ 22.00	$ 0.22	$ -	0.0	10		$ -	$ -	0.0	
6				$ -		$ -	0.0			$ -	$ -	0.0	
7				$ -		$ -	0.0			$ -	$ -	0.0	
8				$ -		$ -	0.0			$ -	$ -	0.0	
9				$ -		$ -	0.0			$ -	$ -	0.0	
10				$ -		$ -	0.0			$ -	$ -	0.0	
11				$ -		$ -	0.0			$ -	$ -	0.0	
12				$ -		$ -	0.0			$ -	$ -	0.0	
13				$ -		$ -	0.0			$ -	$ -	0.0	
14				$ -		$ -	0.0			$ -	$ -	0.0	
15				$ -		$ -	0.0			$ -	$ -	0.0	
16				$ -		$ -	0.0			$ -	$ -	0.0	
17				$ -		$ -	0.0			$ -	$ -	0.0	
18				$ -		$ -	0.0			$ -	$ -	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

INVENTORY SUMMARY — My Candle Shop

USD

Inventory Trigger	Yes

#	Material Inventory List	Units	Typical Receive Quantity	Cost	Cost Per Quantity	Inventory Value	Inventory Quantity	Trigger Value	Finished Product List	Sale Price Per Unit	Inventory Value	Inventory Quantity	Trigger Value
1	Wax	Lbs	50	$ 60.00	$ 1.20	$ 56.40	47.0	50	12 oz Candle	$ 18.00	$ 144.00	8.0	5
2	Candle Wick	Ft	100	$ 22.00	$ 0.22	$ -	0.0	10	16 oz Candle	$ 24.00	$ 216.00	9.0	10
3	12 oz Glass Jars	Ea	12	$ 72.00	$ 6.00	$ 138.00	23.0	20	24 oz Candle	$ 30.00	$ -	0.0	
4	Scent	Pouch	50	$ 15.00	$ 0.30	$ -	0.0	10		$ -	$ -	0.0	
5	Labels	Roll	100	$ 22.00	$ 0.22	$ -	0.0	10		$ -	$ -	0.0	
6				$ -		$ -	0.0			$ -	$ -	0.0	
7				$ -		$ -	0.0			$ -	$ -	0.0	
8				$ -		$ -	0.0			$ -	$ -	0.0	
9				$ -		$ -	0.0			$ -	$ -	0.0	
10				$ -		$ -	0.0			$ -	$ -	0.0	
11				$ -		$ -	0.0			$ -	$ -	0.0	
12				$ -		$ -	0.0			$ -	$ -	0.0	
13				$ -		$ -	0.0			$ -	$ -	0.0	
14				$ -		$ -	0.0			$ -	$ -	0.0	
15				$ -		$ -	0.0			$ -	$ -	0.0	
16				$ -		$ -	0.0			$ -	$ -	0.0	
17				$ -		$ -	0.0			$ -	$ -	0.0	
18				$ -		$ -	0.0			$ -	$ -	0.0	

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

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

YOU WILL ALSO SEE A NOTIFICATION ON YOUR INVENTORY DASHBOARD

INVENTORY SUMMARY — My Candle Shop

USD

Inventory Trigger	Yes

#	Material Inventory List	Units	Typical Receive Quantity	Cost		Cost Per Quantity		Inventory Value		Inventory Quantity	Trigger Value
1	Wax	Lbs	50	$	60.00	$	1.20	$	56.40	47.0	50
2	Candle Wick	Ft	100	$	22.00	$	0.22	$	-	0.0	10
3	12 oz Glass Jars	Ea	12	$	72.00	$	6.00	$	138.00	23.0	20
4	Scent	Pouch	50	$	15.00	$	0.30	$	-	0.0	10
5	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	
14				$	-			$	-	0.0	
15				$	-			$	-	0.0	
16				$	-			$	-	0.0	
17				$	-			$	-	0.0	
18				$	-			$	-	0.0	

Finished Product List	Sale Price Per Unit		Inventory Value		Inventory Quantity	Trigger Value
12 oz Candle	$	18.00	$	144.00	8.0	5
16 oz Candle	$	24.00	$	216.00	9.0	10
24 oz Candle	$	30.00	$	-	0.0	
	$	-	$	-	0.0	
	$	-	$	-	0.0	
	$	-	$	-	0.0	
	$	-	$	-	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?

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

Value On Hand	$	-
Received	$	-
Used	$	-

USD

*Initial Set
*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

CURRENT VALUE AND QUANTITY OF ON HAND INVENTORY

*SEE STEP 10 FOR MORE DETAILS

QUANTITY ADDED OR SUBTRACTED FROM INVENTORY

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

DETAILS AND COMMENTS

DATE

FINISHED PRODUCTS

My Candle Shop

Value On Hand	$	-			USD			*Initial Setup
Received	$	-						*Inventory Correc
Used	$	-		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

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	

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!

d	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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