

POS Implementation Committee Meeting

Thurs, Oct 19, 2023

Attendees: Tina, Lance, Kathy, Valarie, Amanda, Joy, Patty, Frank

Items Reviewed/Discussed:

- Square reports for Patty/reconciling
 - Lance led Patty to her reports under “bank” in Square and she got the info she needs specific to the Square reports
 - Patty wants to be sure that at the end of Oct she can get matching reports out of Square and Rose to make sure everything matches for commission payments
 - Patty would like to see a report of everything sold from Oct 1 through Oct 18 to see what the data looks like (in Excel) – Amanda ran this report and she’ll email to Patty for review
- Batching
 - Amanda can handle batching on a regular basis (may be weekly)
 - Patty asked that we send her a downloaded report (via email) *after* any edits are made to the batch and *before* we process the batch – if anyone is filling in for Amanda to run batching, we need to remember to run this downloaded report for Patty before posting the batch (and, again, after any necessary edits have been completed)
- Payouts
 - We discussed the payout option to report to members what they are paid monthly and looked at the payout screen – we reviewed a video during the meeting and Patty may try the payouts with the members of this team at the end of Oct to see how labor intensive the process is & to confirm if this process can be done for all members going forward each month
 - Amanda confirmed we still have some training sales and she will go in and delete those sales prior to our date of go live
- Patty needs a report in Square that identifies items sold with the 4-digit Rose number – Tina to ask Mike if there is a way to get this information for her. Lance suggested maybe setting up everyone as a “vendor” in Square or we can continue to use the old code in the description line.
 - Depending on Mike response, we can send an email to the membership to ask them to continue to use the old Intuit codes in the beginning of each items “description” field
- Printer status
 - Dymo printer is cutting off the SKU when printing multiple stickers – Amanda is looking into this issue currently (the bar code is readable, however)
 - Currently the Dymo printer is being used for 1x1 labels and jewelry labels – we discussed that, for now, we’ll keep the old TSC printer in use for printing old inventory labels from the Intuit

- Lance suggested a second Dymo printer for a dedicated jewelry printer
- Lance mentioned that you can print your Rose stickers to the TSC printer from Square (and you do have to be logged in to Square to do so)
- Documentation updates
 - Amanda recently added updated to the bar code print instructions
 - Amanda added shipping instructions (including printing 2 receipts)
 - Amanda added instructions on tax exempt sales
 - Amanda added instructions on how to process split payments
- Contract (artist) & inventory entry for upcoming shows (HM & PBP)
 - Is Jean doing ok with contract (artist) & inventory entry?
 - For PBP, Lance & Frank & Amanda were discussing using a tile for each vendor (vs. entering inventory)
 - Lance & Frank to test this in advance of January
 - Request was made if Frank to confirm how a variable tile can be tied to a Rose 4-digit code – or – can we do these payments straight out of Square?

To Do:

- Formulate plan for ongoing visiting artist/visiting artist inventory entry into Rose
 - Formulate a plan for deleting contracts/inventory after show is complete
- Let membership know that “e” gift cards are electronic (there is no physical gift card)
- Address discounts for future use (AOM?, member to member sales?, multi-item discounts) or do we end these programs?
- Continue asking Mike about discount functionality in Rose (option to take discount from CW vs. from artist)
- Continue asking Mike about ability to run batches on same day (vs. waiting til after midnight ET)
- Continue asking Mike about progress with label designer
- Continue asking Mike about ability to choose contract numbers for contract entries in Rose (for example, all visiting artists get a 9000 series number)
- Continue asking Mike about updates to printing to make Rose compatible with our “old” Zebra printer (or is this a non-issue now?)
- Continue asking Mike if quantities can be set at zero

