ARTSMART ARCHIVE APP
QUICK GUIDE

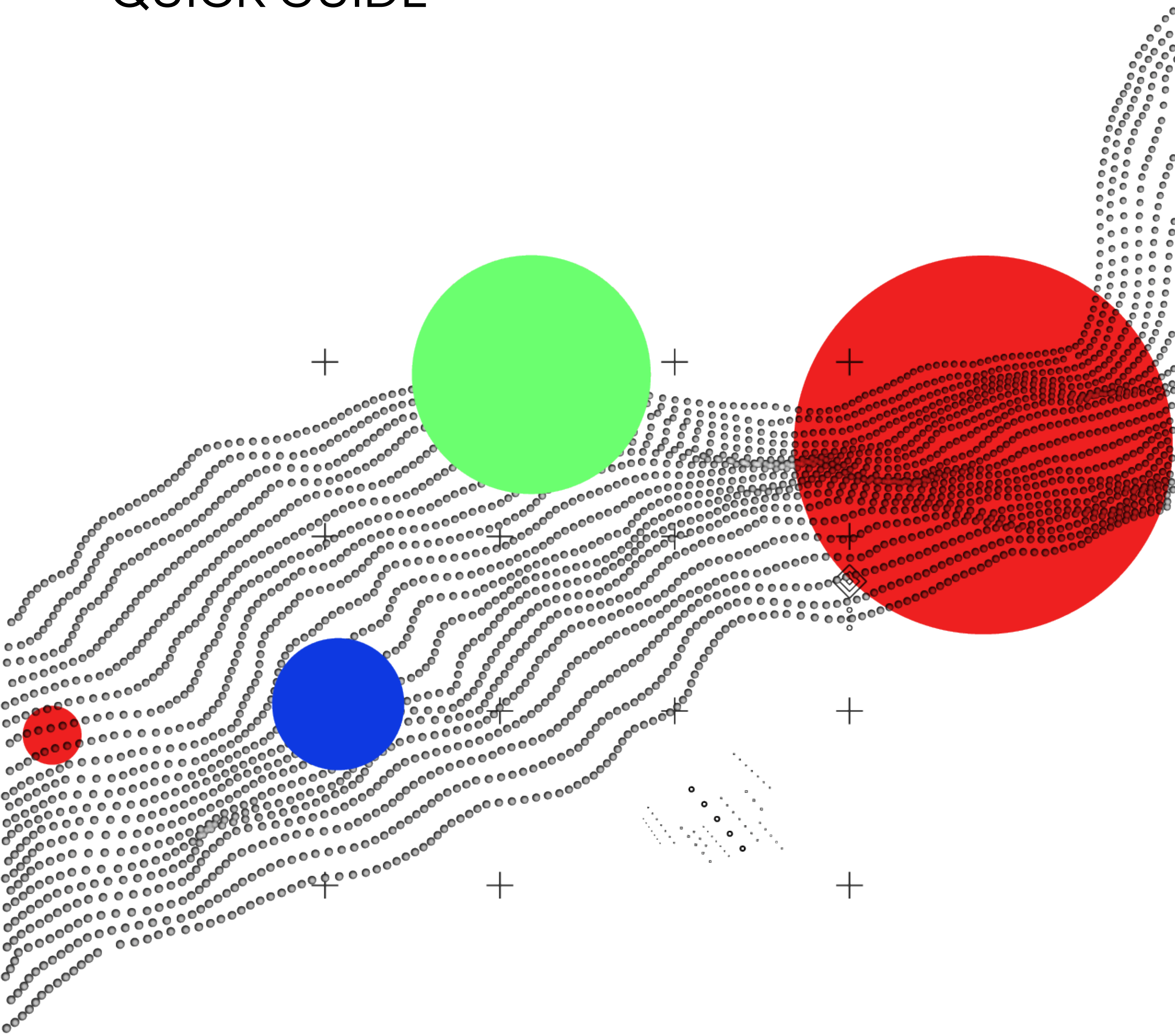
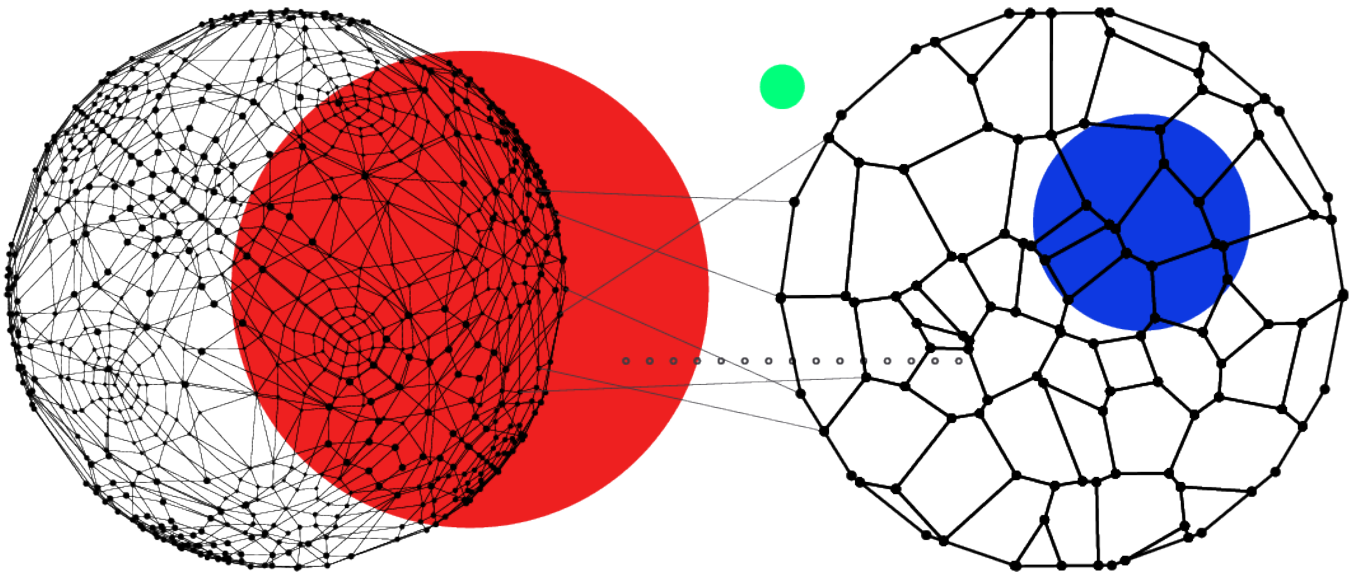


TABLE OF CONTENTS

YOUR COMPANY



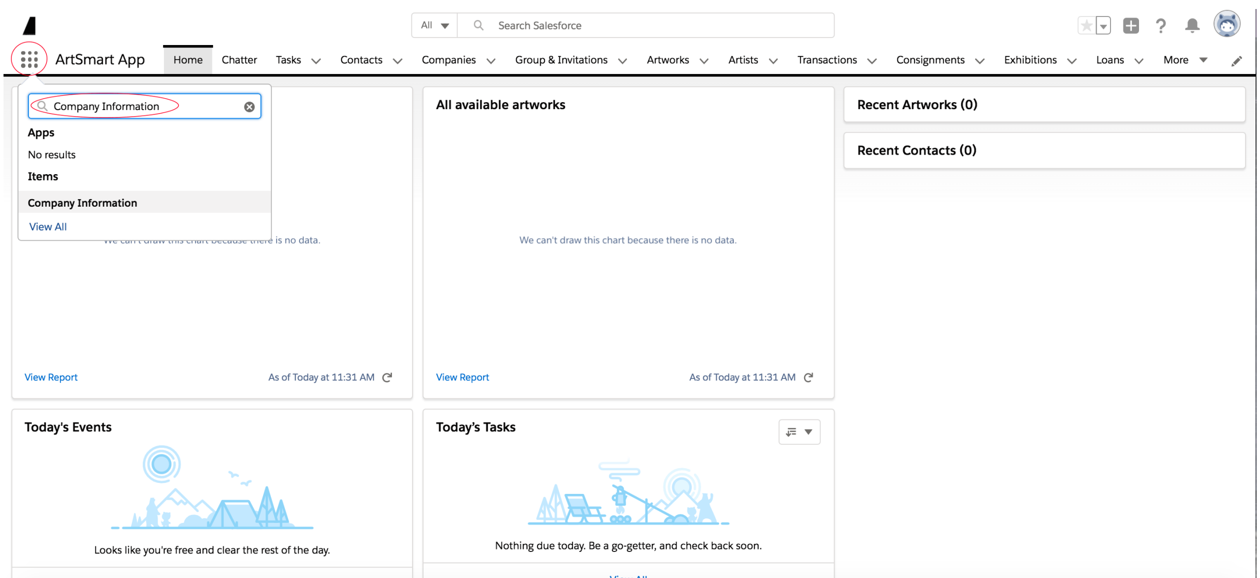
WITHIN THIS SECTION:

ACCESSING YOUR COMPANY INFORMATION

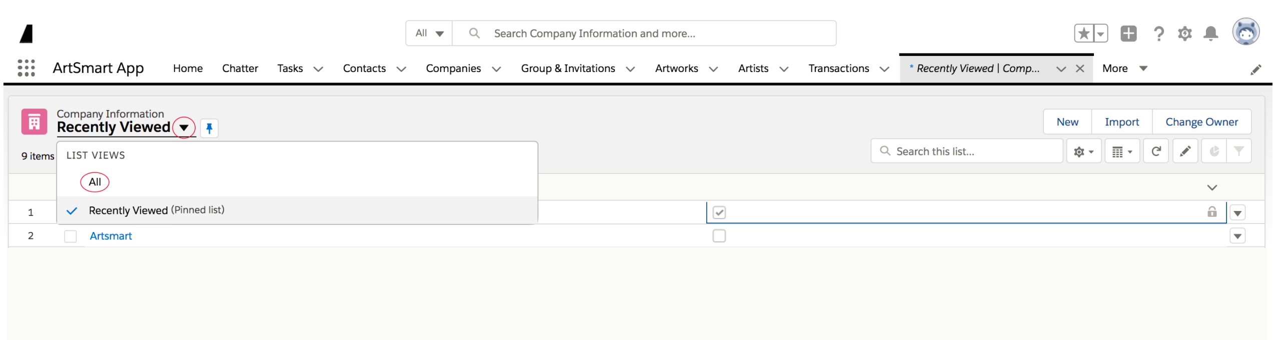
ADDING A LOGO

ACCESSING YOUR COMPANY INFORMATION

1. Go to the Company Information Object. This object is not usually available in the tab, so click on the 9 dots on the left of the navigation bar. Then type Company Information on the search bar and click on the Company Information Object.



2. When you arrive at the Company Information tab, select View All by using the arrow button next to Recently Viewed and clicking All.

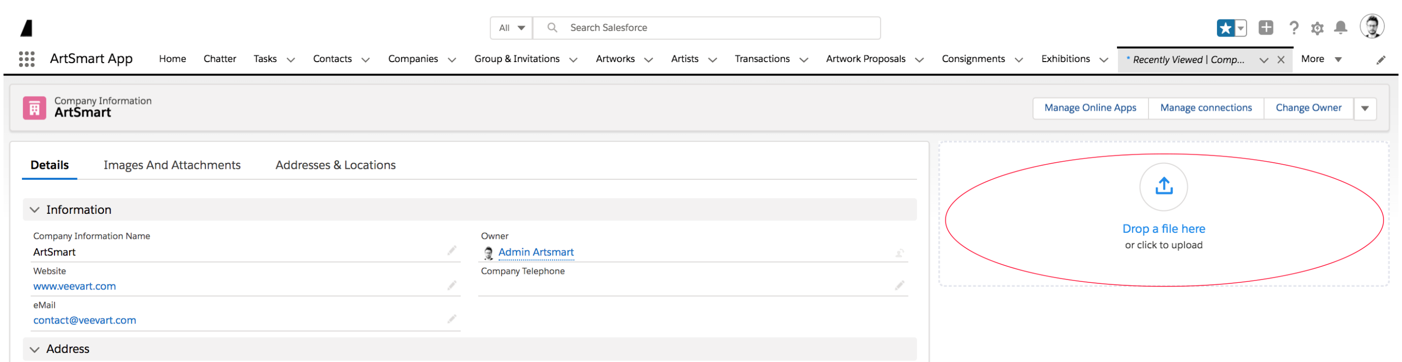


Once you've selected All, the record of your gallery should appear.

ADDING A LOGO

This section explains how to add your logo to all the documents generated by the application. In order to do this, the logo needs to be added as a file in ArtSmart Company Information record uniquely created for your organization

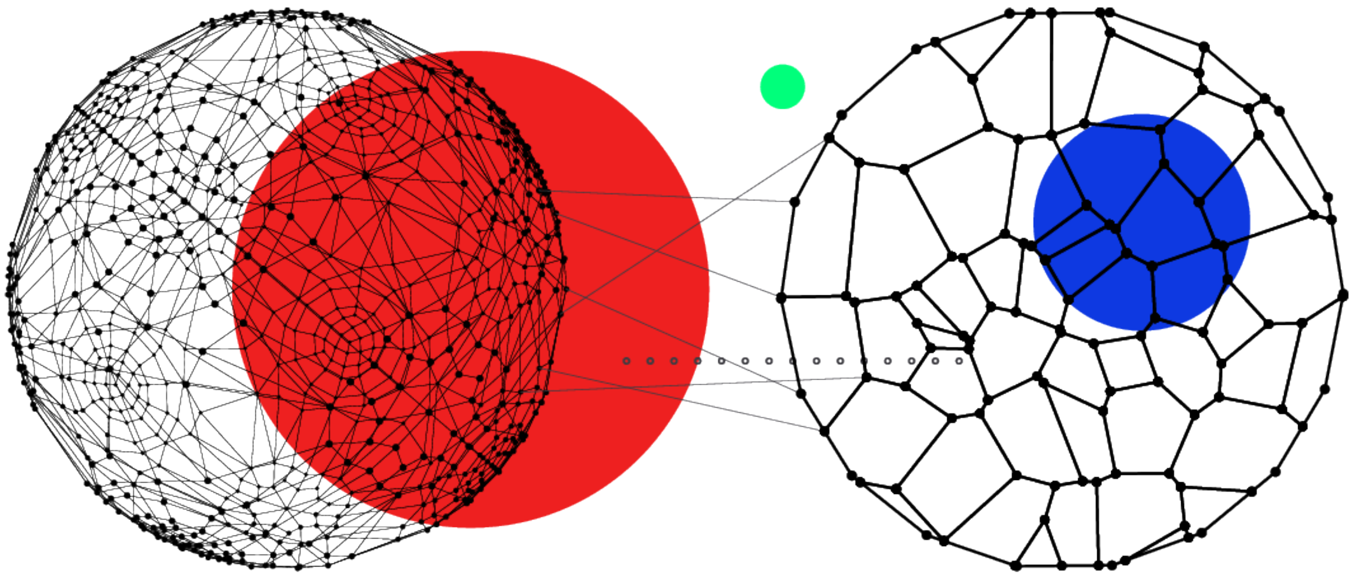
Once in your company information you just drag and drop your logo into the window:



Test the different documents to ensure the logo appears:

Artworks printout
Artworks lists
Artworks lists with price
Invoices

MANAGING COMPANIES AND CONTACTS



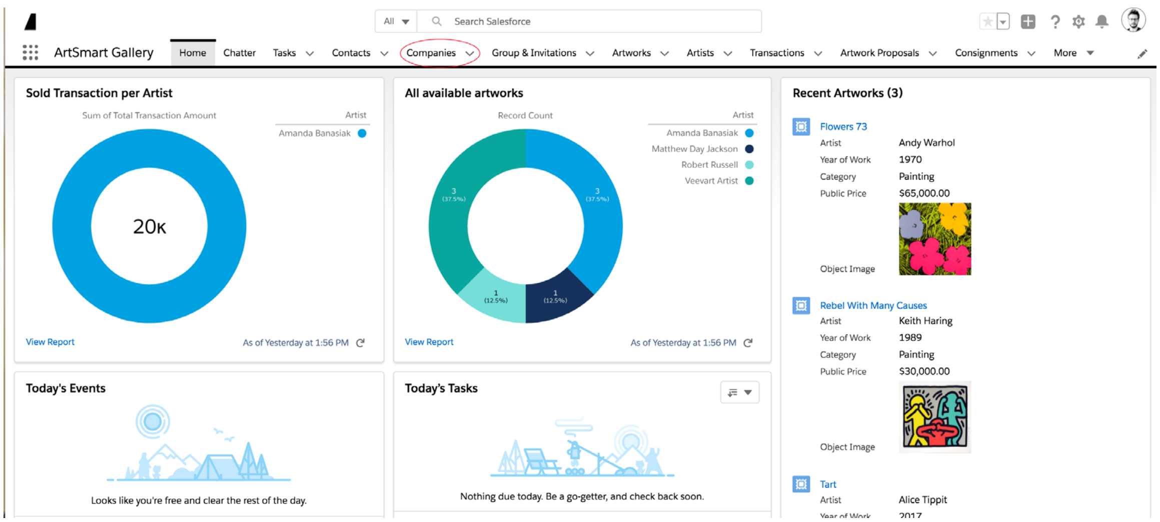
WITHIN THIS SECTION:

CREATE A COMPANY

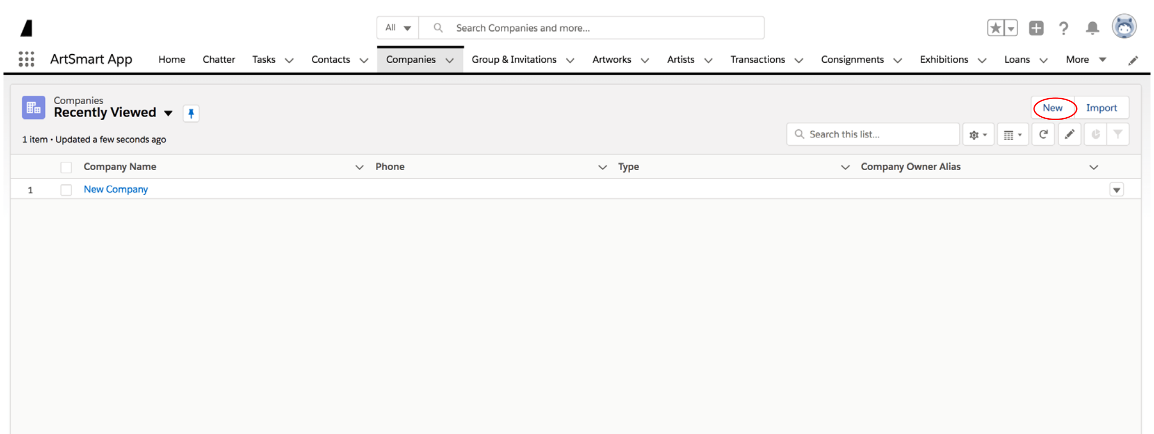
CREATE A CONTACT

CREATE A COMPANY

1. Click COMPANIES from the menu that runs along the top of your screen when logged into your account on your Home Dashboard.



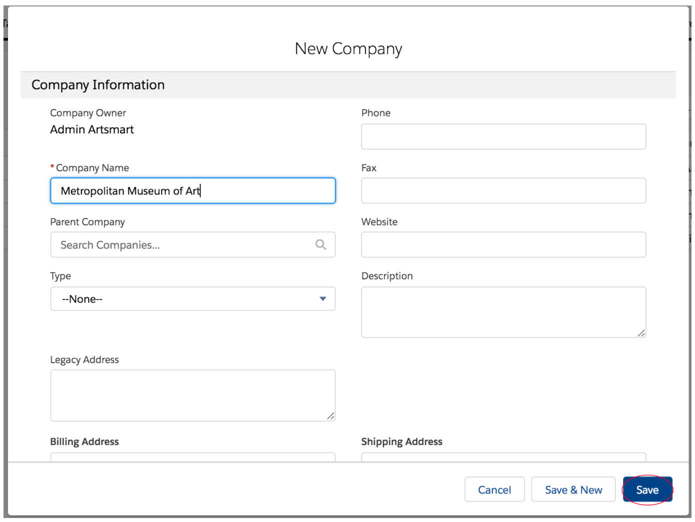
2. Then click the New button in the top right corner.



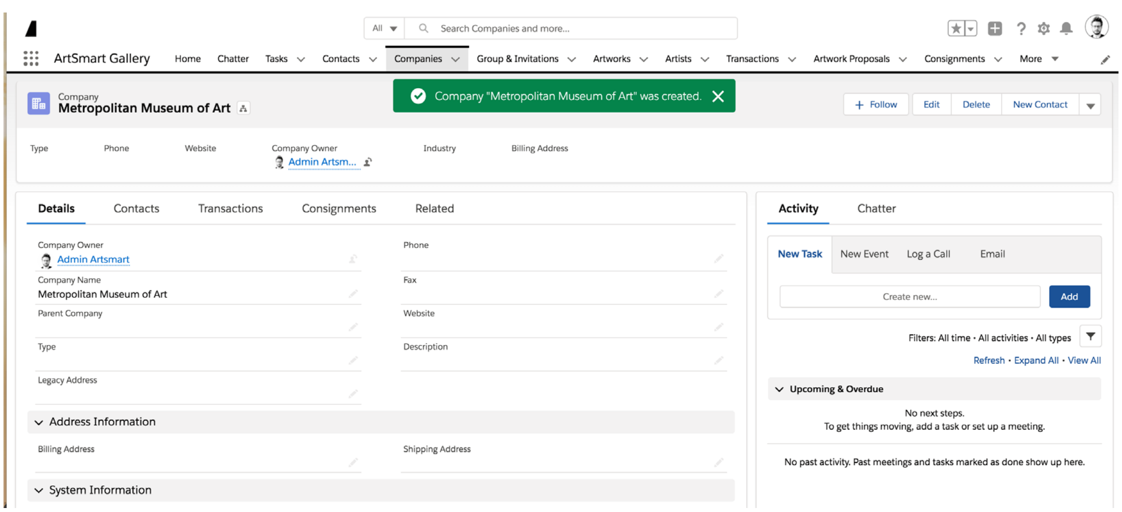
*It is important to enter the company first before any contacts.

CREATE A COMPANY

3. Enter the company information like the website, phone number, billing and street addresses and click save.

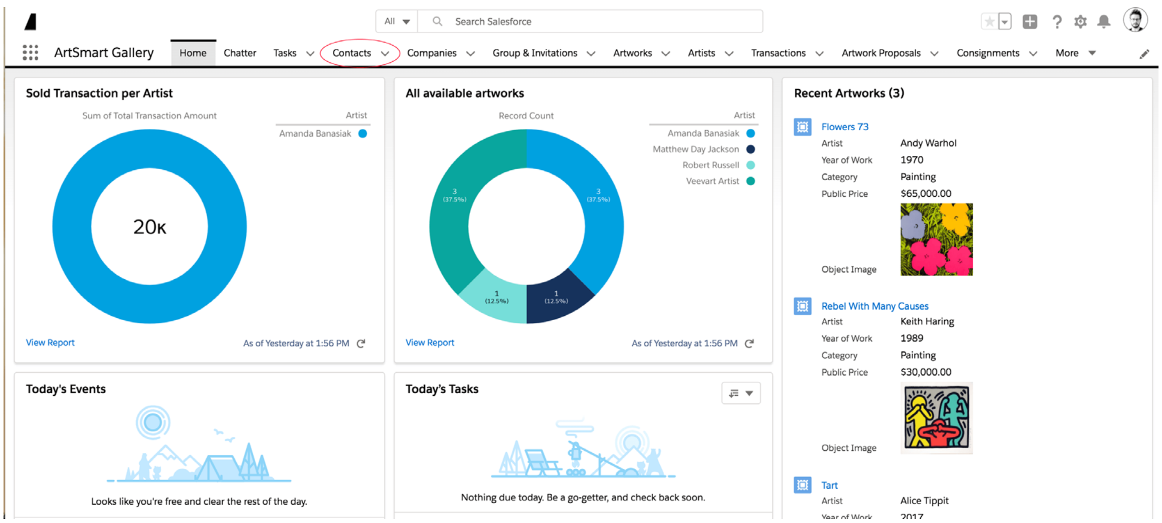


4. Now you can see the company's contact page which holds all of its information.

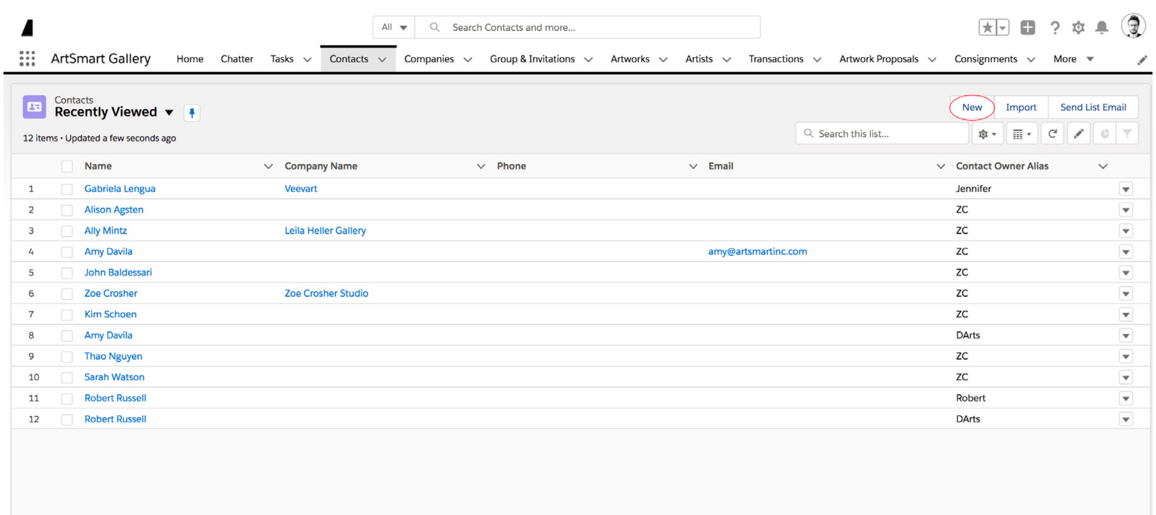


CREATE A CONTACT

1. Click CONTACTS from the menu that runs along the top of your screen when logged into your account on your Home Dashboard.

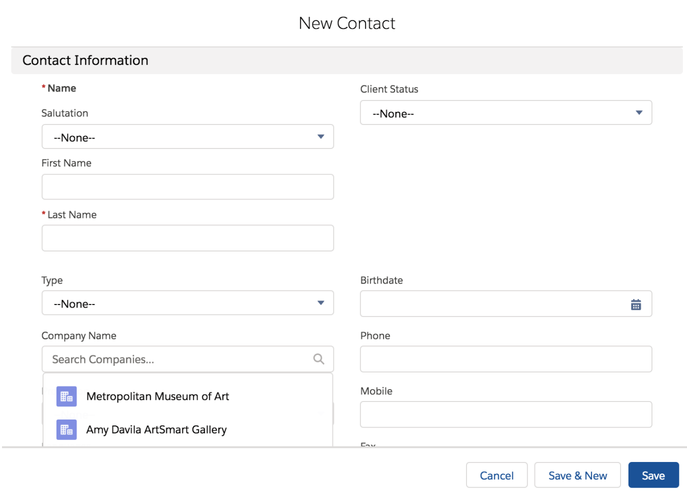


2. Then click the New button in the top right corner.

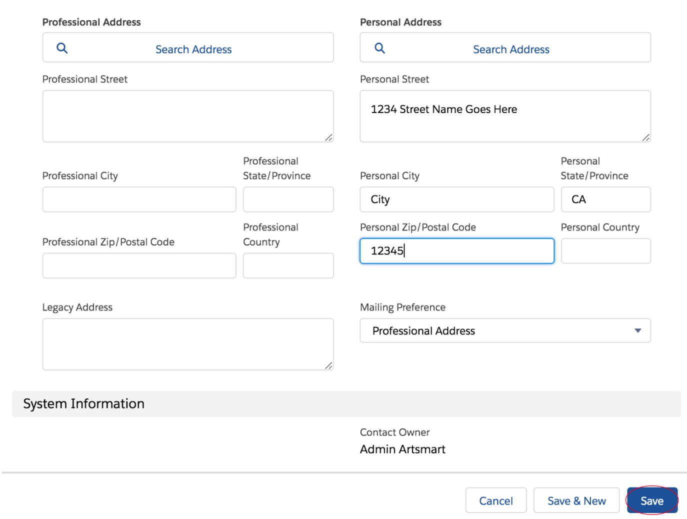


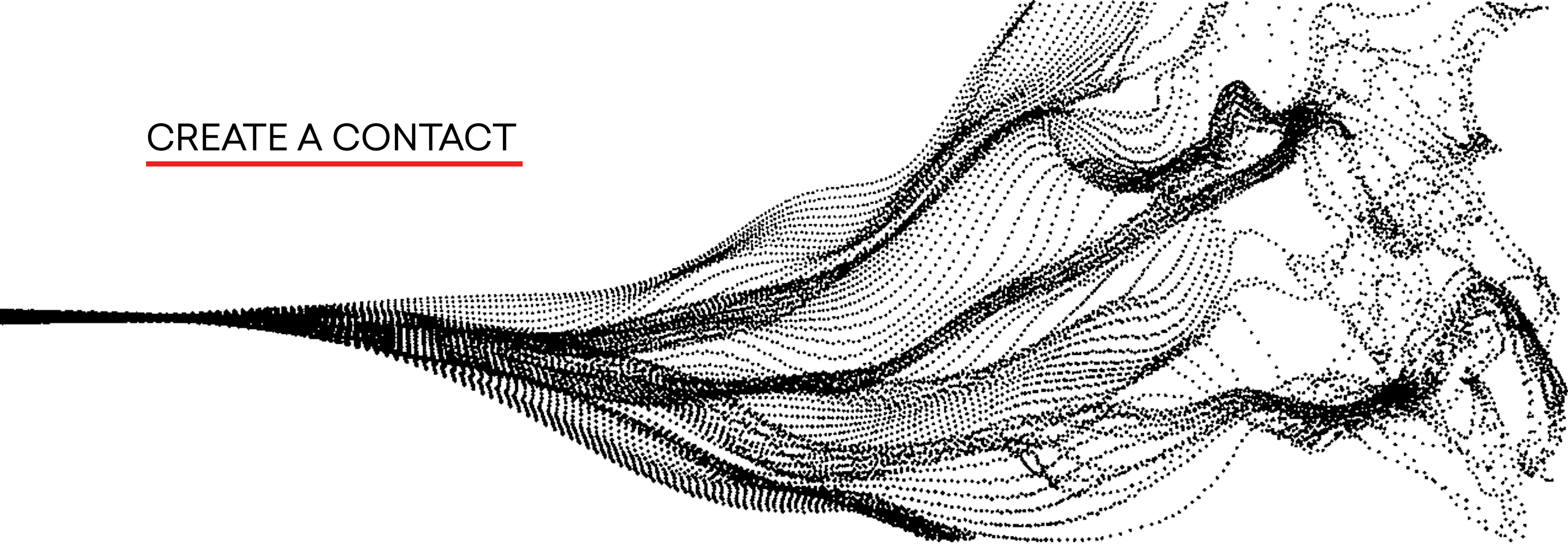
CREATE A CONTACT

3. Select the company that this contact works for.
*This is why it's important to enter the company first before any contacts.



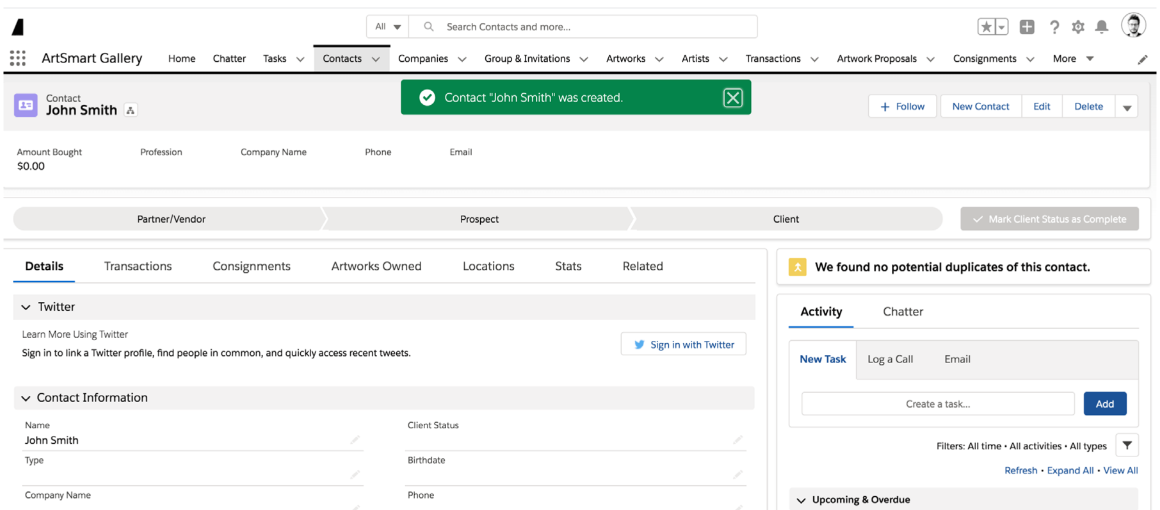
4. Enter the contact information like the email, phone number, personal address, and click save.



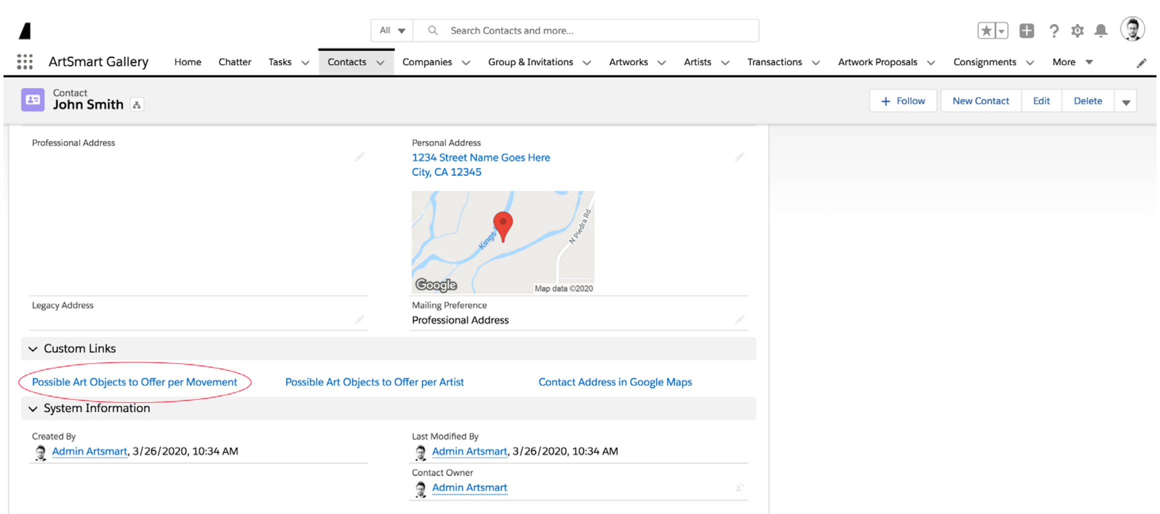


CREATE A CONTACT

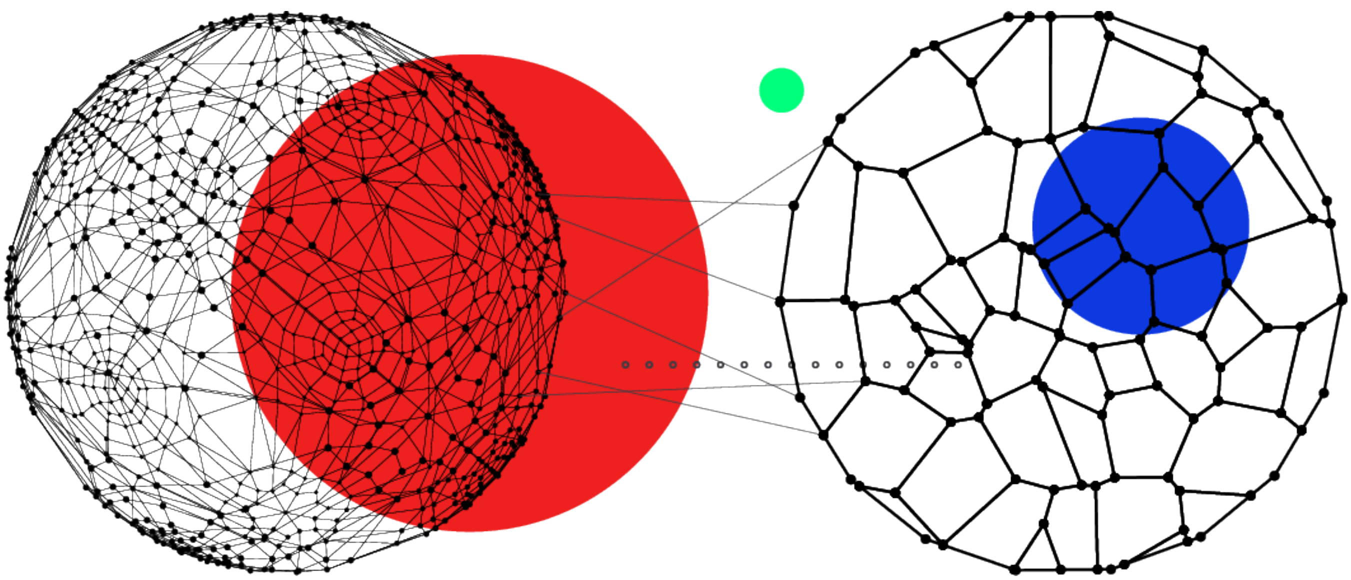
5. Now you can see the person's contact page which holds all of their information.



6. The information in the Artistic Preferences and Preferred Artists field will allow you to create quick lists of artwork to offer. These fields will automatically update as you work with your collectors.



ADDING AN ARTWORK TO INVENTORY

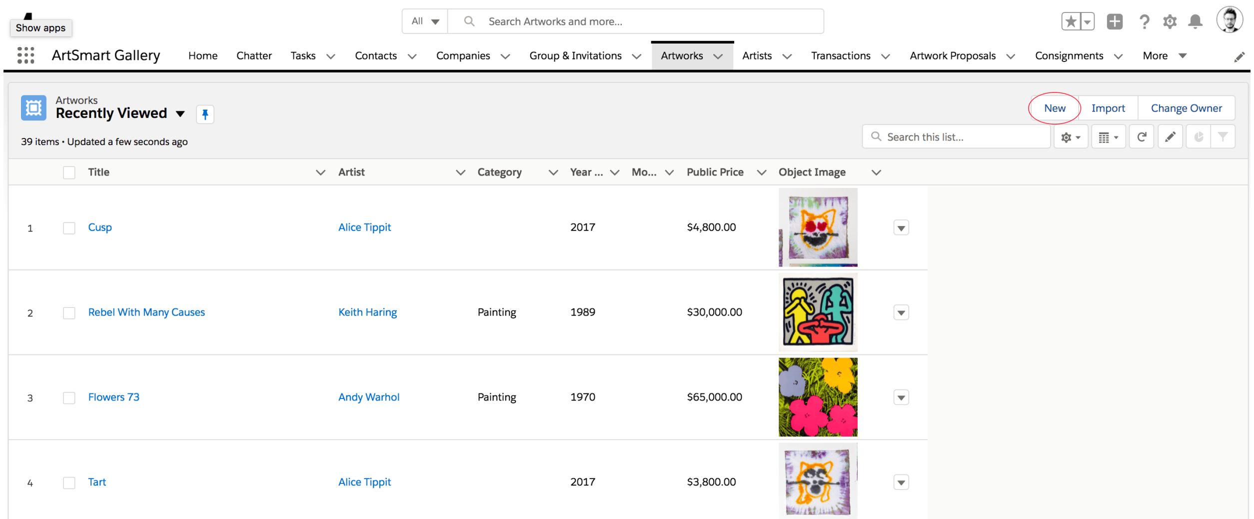


WITHIN THIS SECTION:

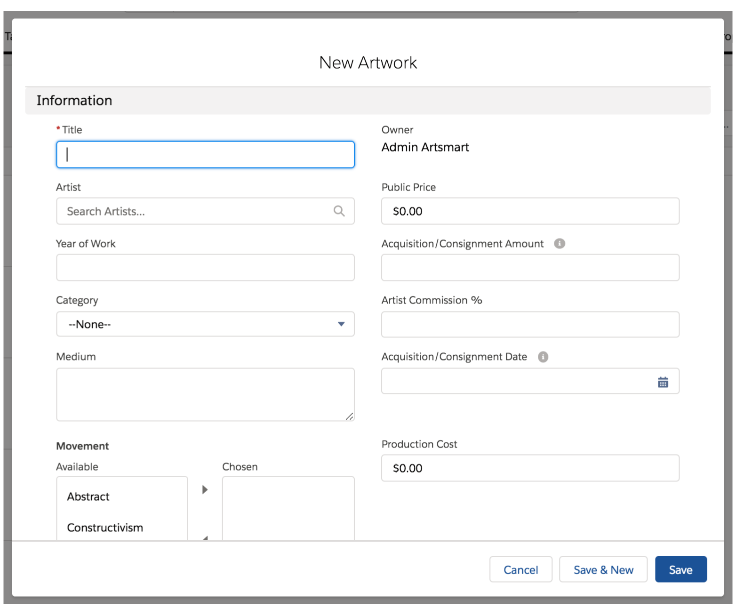
ADDING AN ARTWORK TO INVENTORY

ADDING AN ARTWORK TO INVENTORY

1. Click NEW under the Artworks tab.



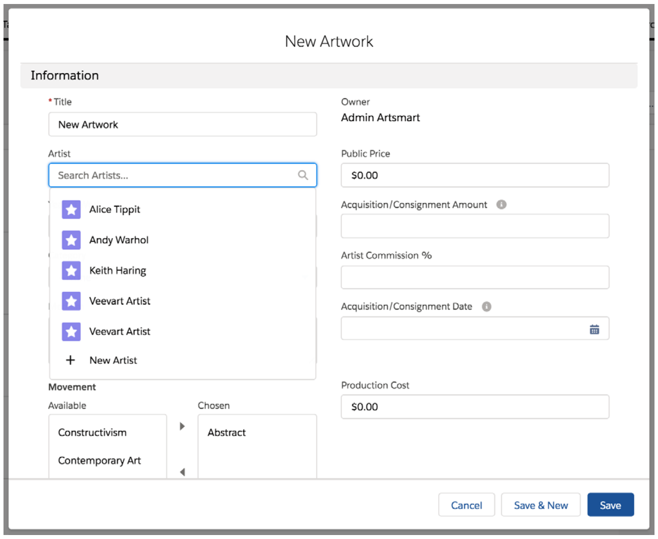
2. Fill in the desired fields:



These fields will have been previously customized by our team in order to match your needs.

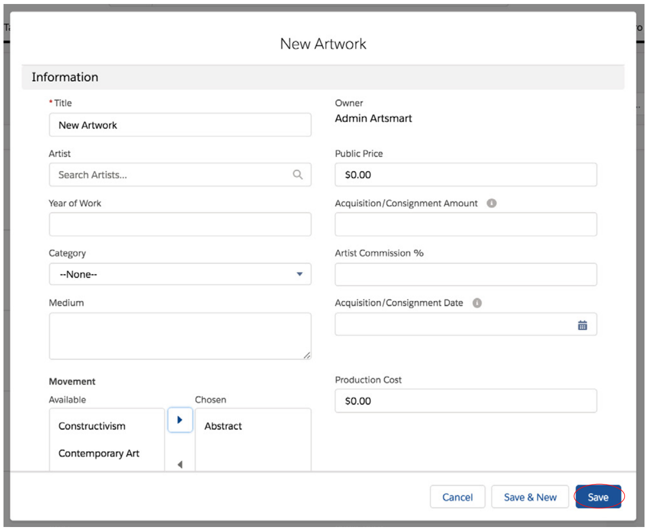
ADDING AN ARTWORK TO INVENTORY

3. Search for the artist you are looking for, or create a new artwork directly from the Artwork page.



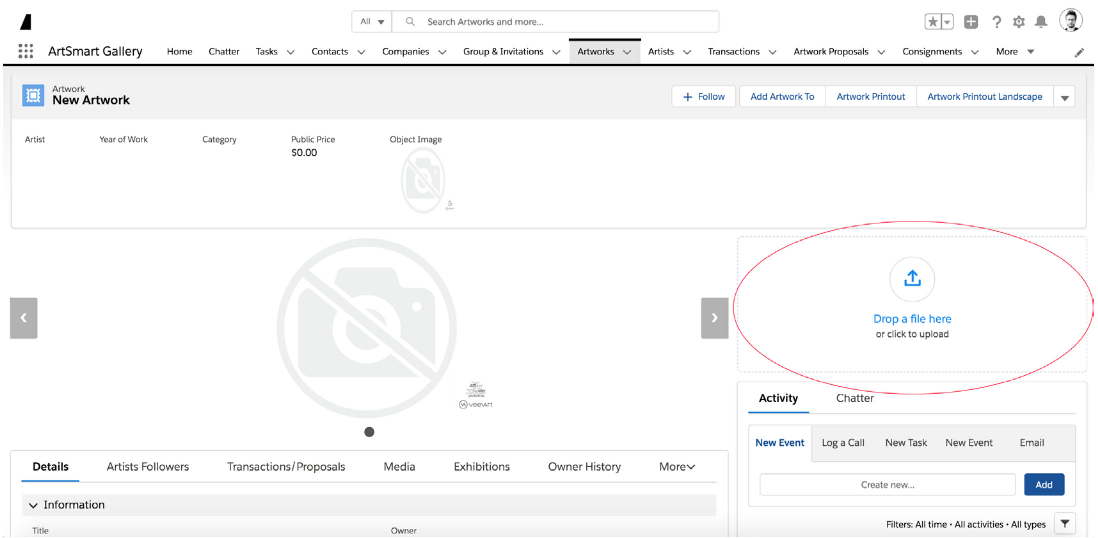
In order to ensure consistency, fields can be mandatory or only visible/editable by specific users.

4. Click save when you are done entering the information for the artwork.

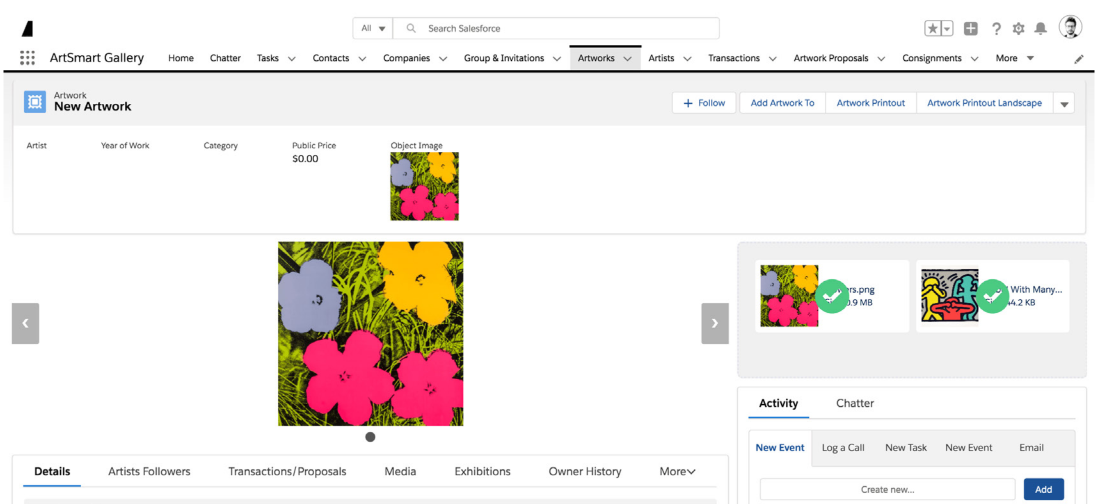


ADDING AN ARTWORK TO INVENTORY

5. To upload an image of the artwork, drag and drop the image file or click in the dedicated area. Any file format can be uploaded as well as several files at one time.

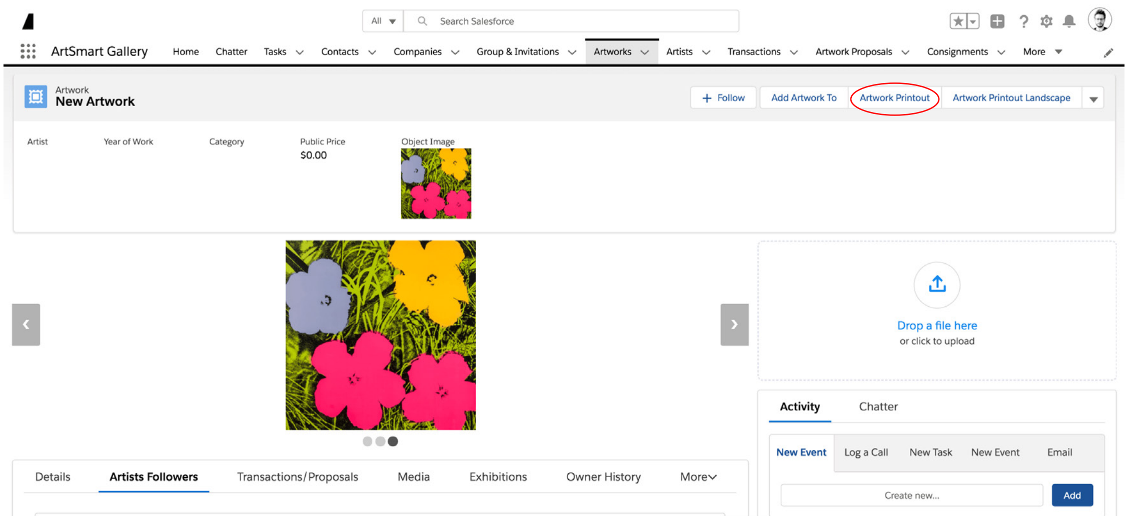


6. By default, the first file uploaded will be the primary one that is used in the automated documents.

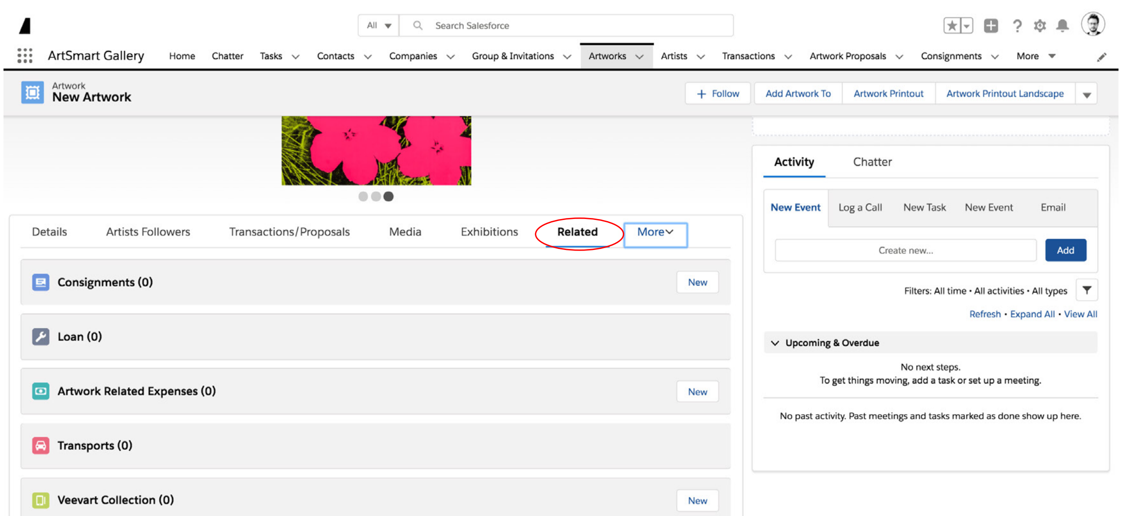


ADDING AN ARTWORK TO INVENTORY

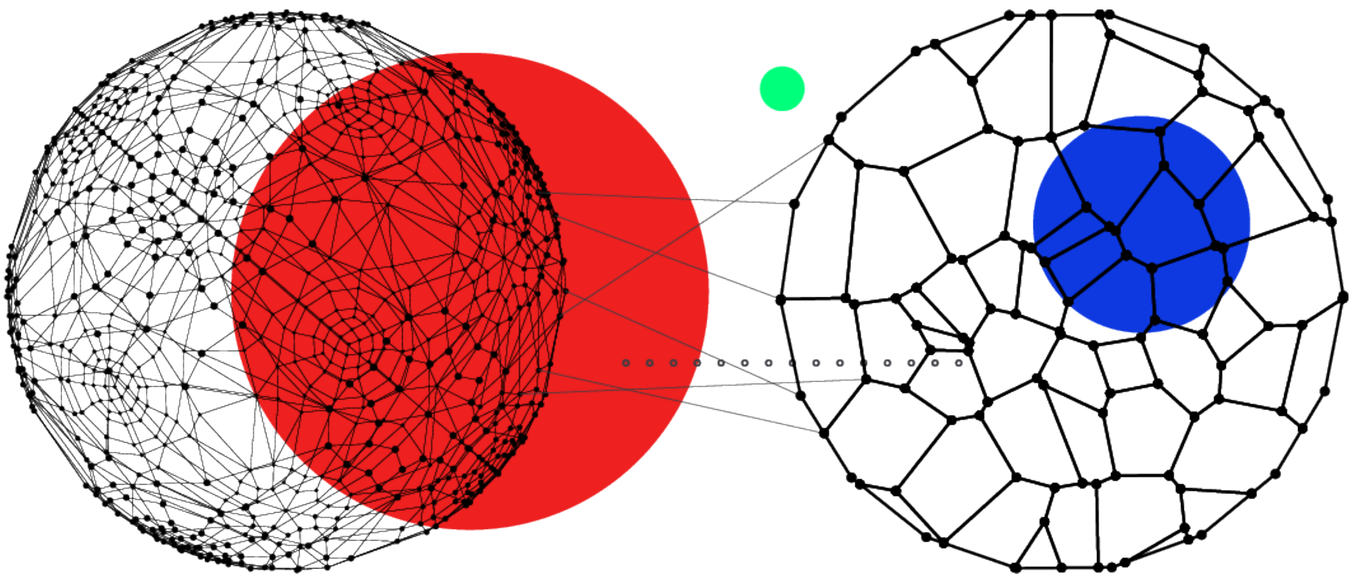
7. Use the PRINT OUT button to edit the artwork PDF.



8. Eventually, use the Related tab to see additional information such as Exhibitions, Transports and Loans.



GENERATING A LIST OF ARTWORKS

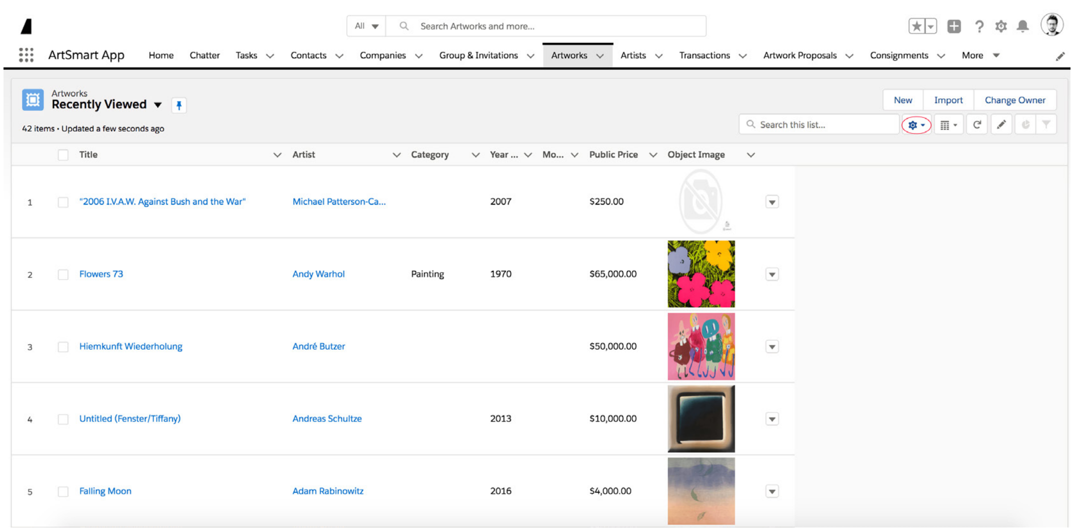


WITHIN THIS SECTION:
CREATING A LIST
MANAGING A LIST

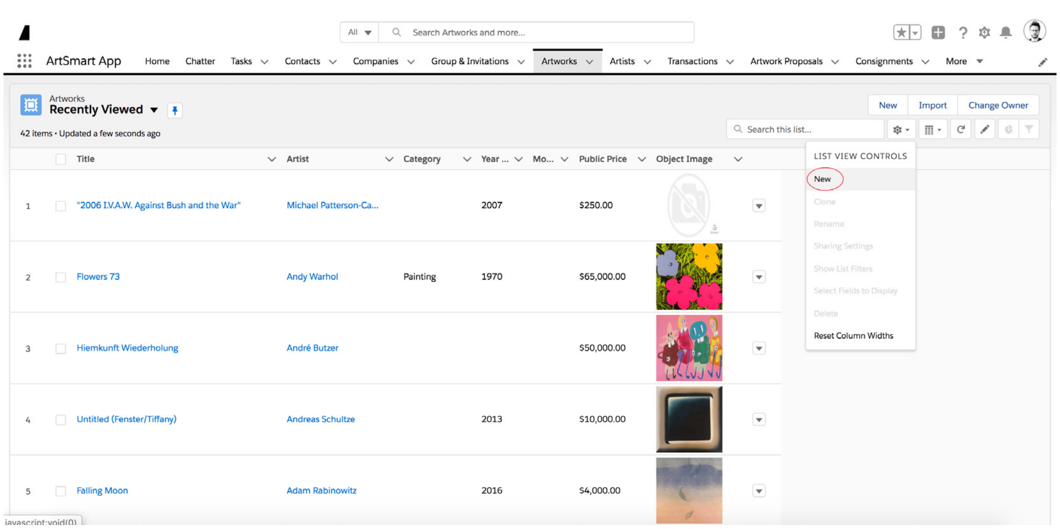
CREATING A LIST

This section will show how to create specific lists using the artwork that you previously added. After adding new Contacts and Artwork, you can click on the tab on the top menu and each category, by default, will present RECENTLY VIEWED items

1. Click gear button to the right of the Search Bar.

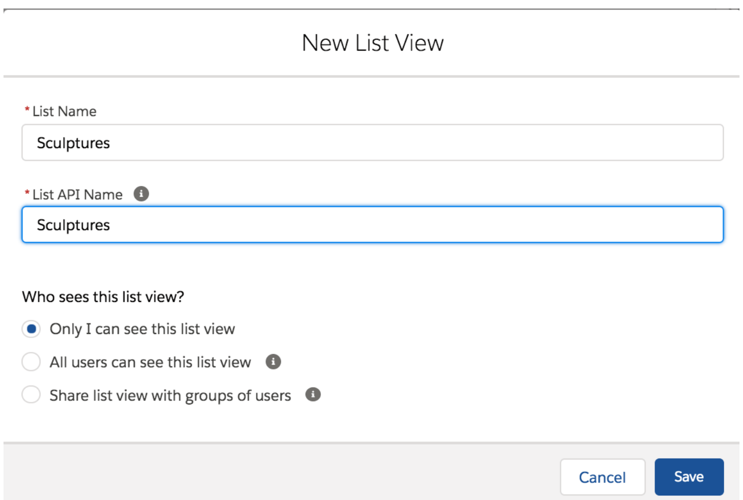


2. A drop down will appear and then click NEW.

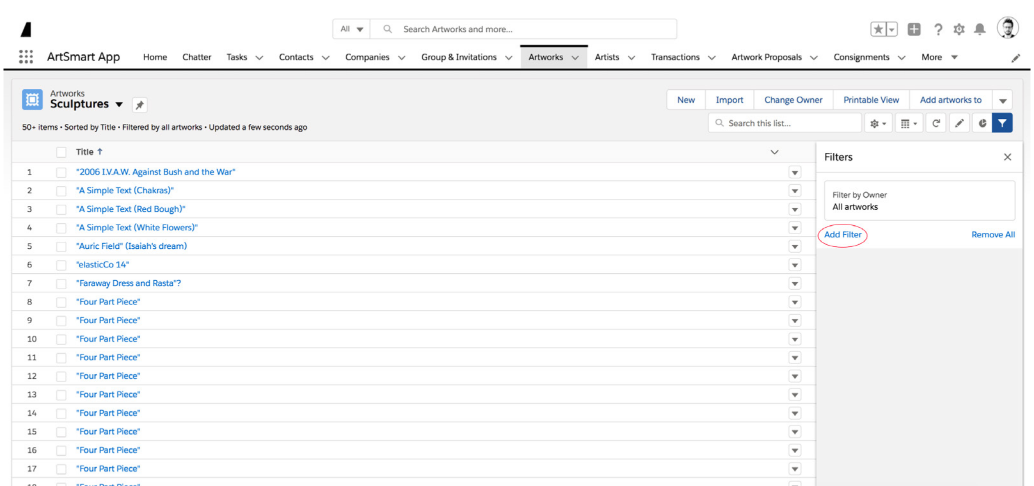


3. Under New List View create a List name. The List API name will populate itself using the list name as reference. If you'd like to change this, you can manually. Then press save.

* The List Name is what your users will see in SalesForce. The API name is the name of the list that the developers need when doing custom coding, etc.

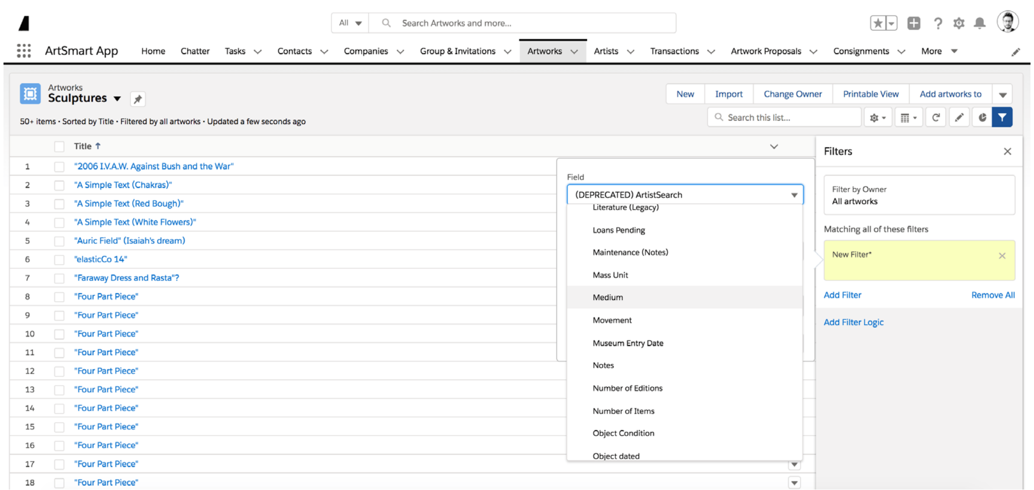


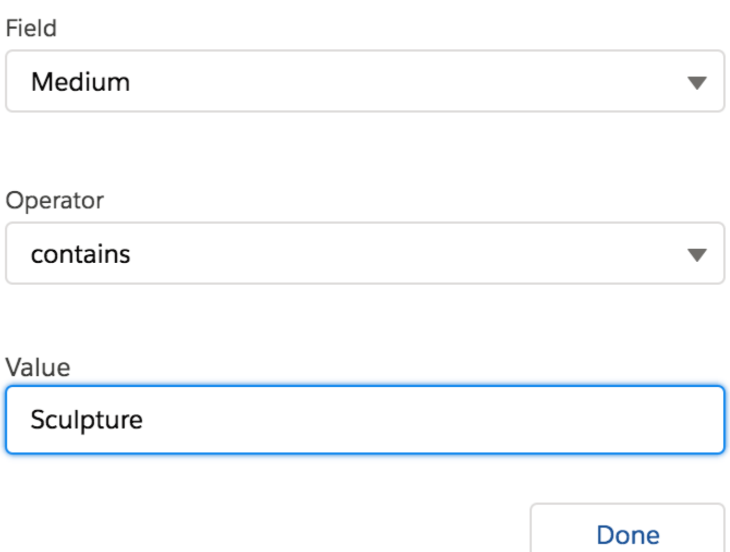
4.Once saved, the list will automatically populate with all artworks in your system. Press ADD FILTER to specify what will be in this list.



CREATING A LIST

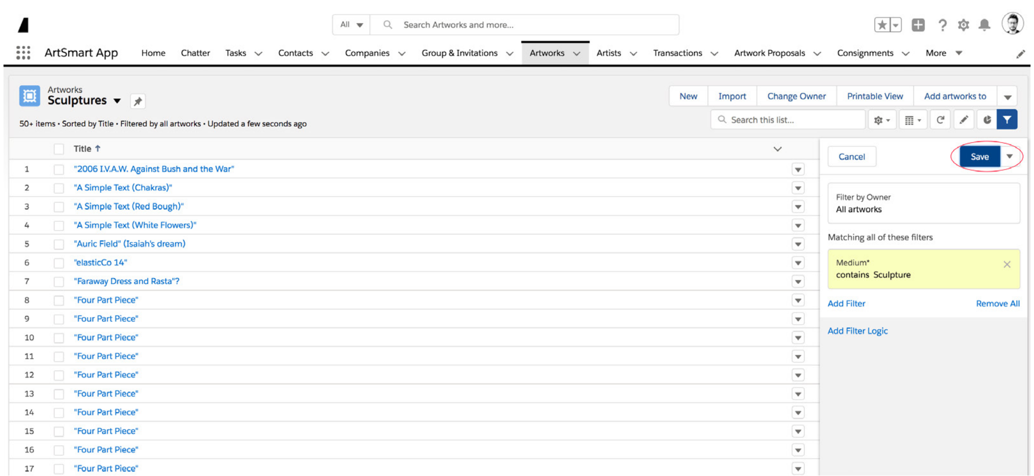
5. When adding a new filter, a box will come up where you will choose a Field, Operator and Value. For this example, we chose Medium as the Field, Contains as the Operator and Sculpture as the Value. This will change depending on what you'd like your list to contain. Once you've filled this out, press done to continue.



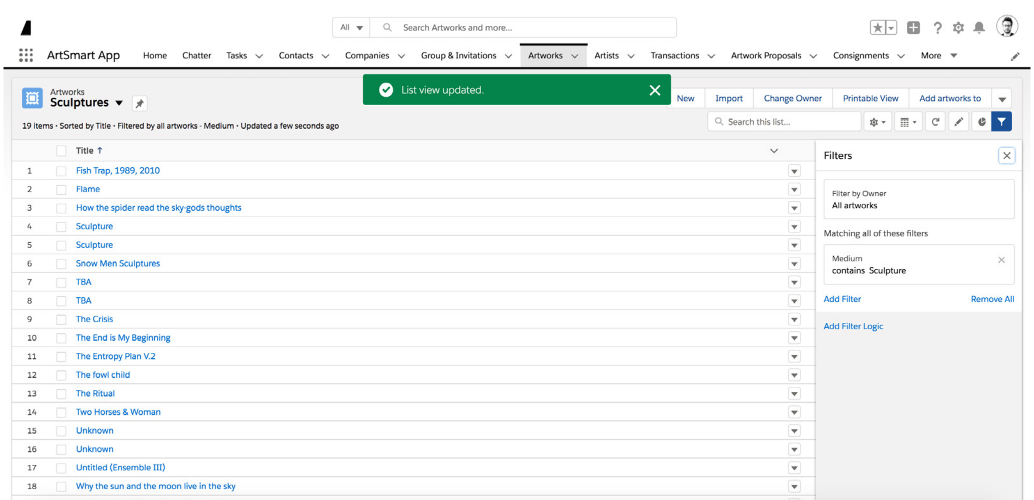


CREATING A LIST

6. Once you've created the new filter, you must press Save in the upper right corner in order for the system to repopulate your list.



7. Once saved, the list will populate all artworks that are relevant to your chosen filter.

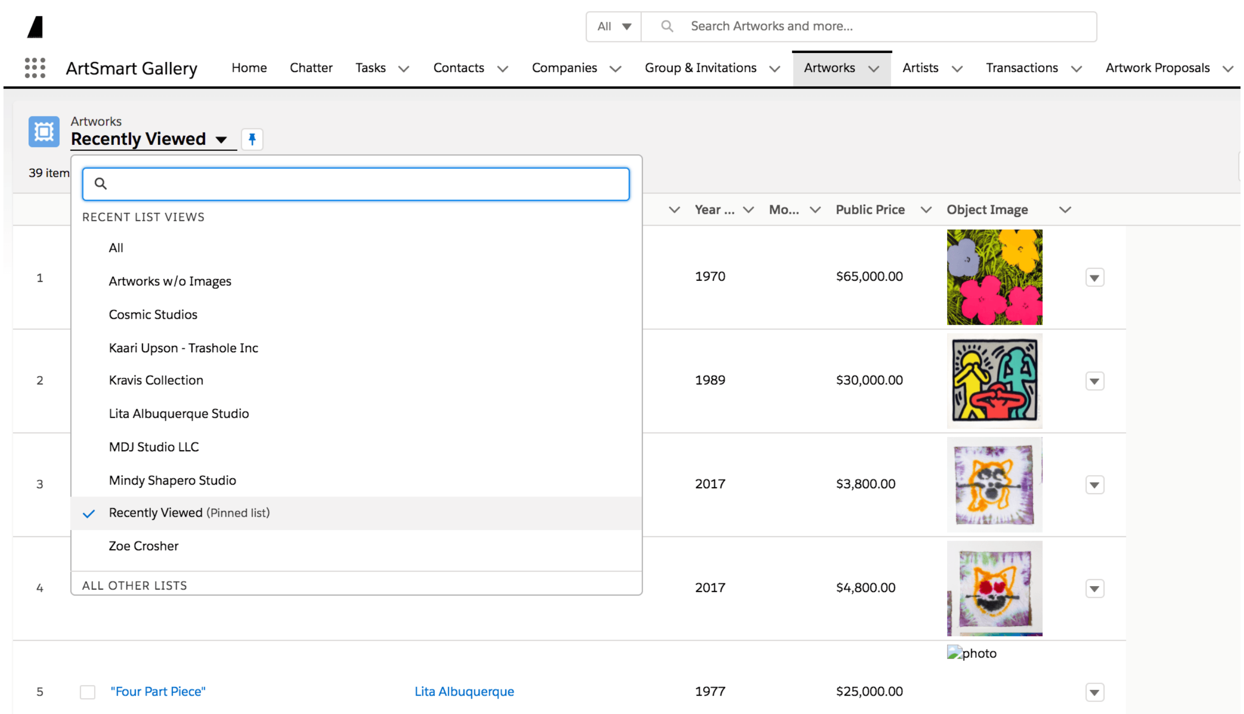


MANAGING A LIST

In addition to the lists you create, there's also automatically-generated lists. For example, you can also filter your artwork inventory by RECENTLY VIEWED. This can be helpful for different purposes:

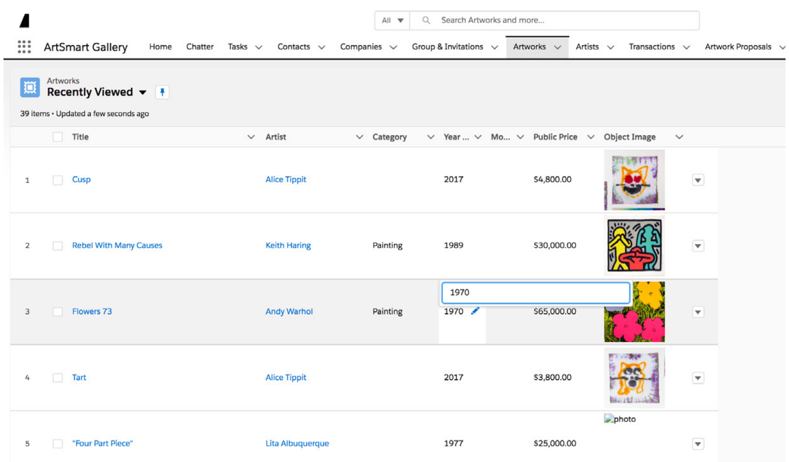
1. Filtering Data
2. Quickly Editing Data
3. Generating documents

Use the dedicated drop-down menu to access the lists you have created and the ArtSmart App has auto-generated.

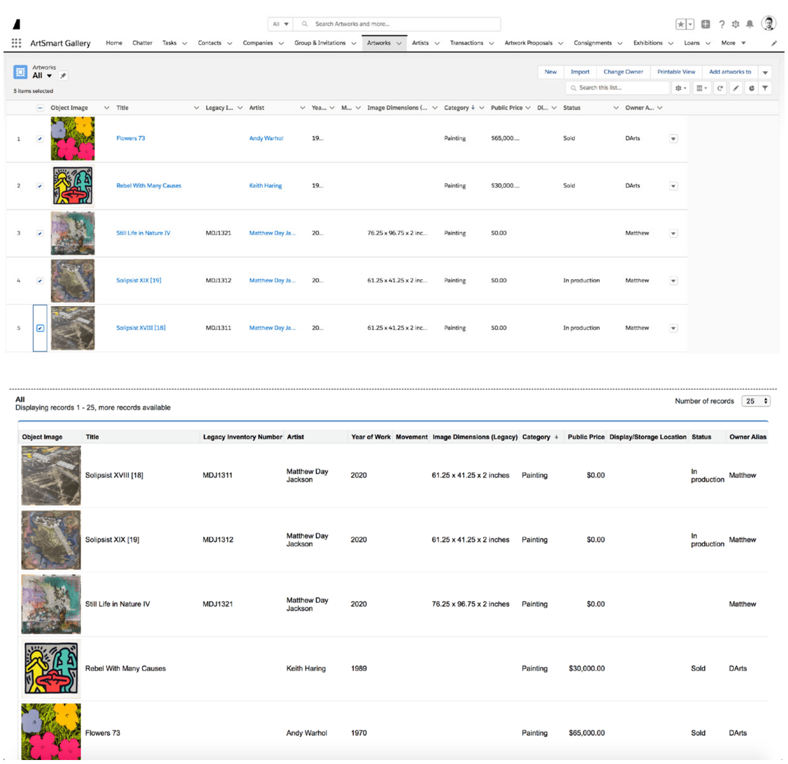


MANAGING A LIST

1. Click on the field you'd like to edit in order to update its information.
This simple operation will enable you to save time by editing multiple artworks at once.

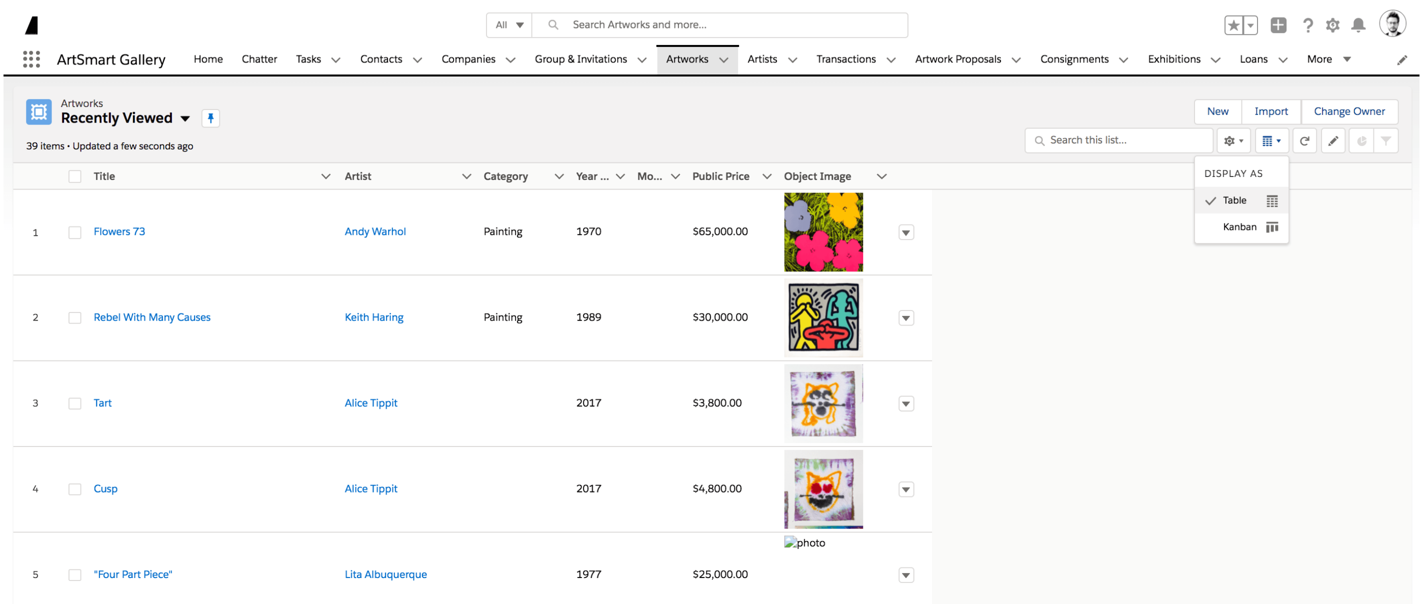


2. Use the left-hand check marks to select the artworks within your LIST, and
the PRINT LIST button to generate a document presenting the selected works.



MANAGING A LIST

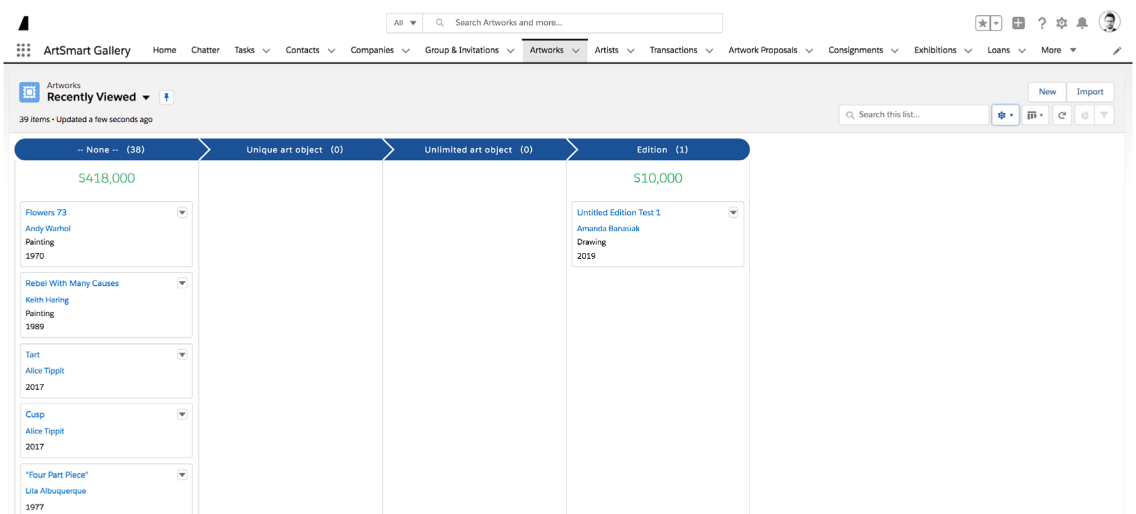
Views can be seen under 2 formats:
1. Grid
2. Kanban



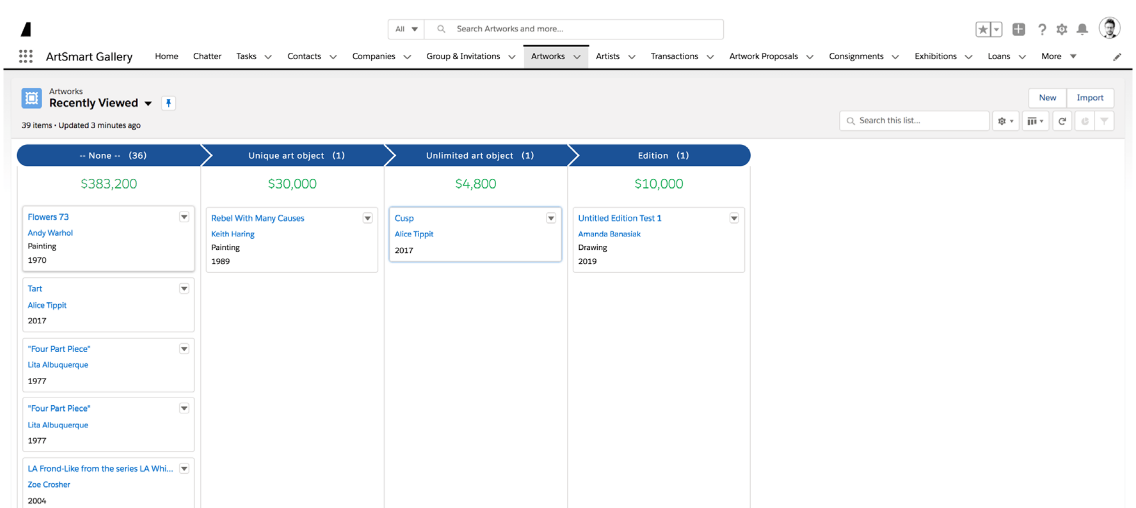
You can switch from one to the other using the display icon on the top right hand menu.

MANAGING A LIST

The Kanban display can be very useful when you need to visualize the status of your inventory.

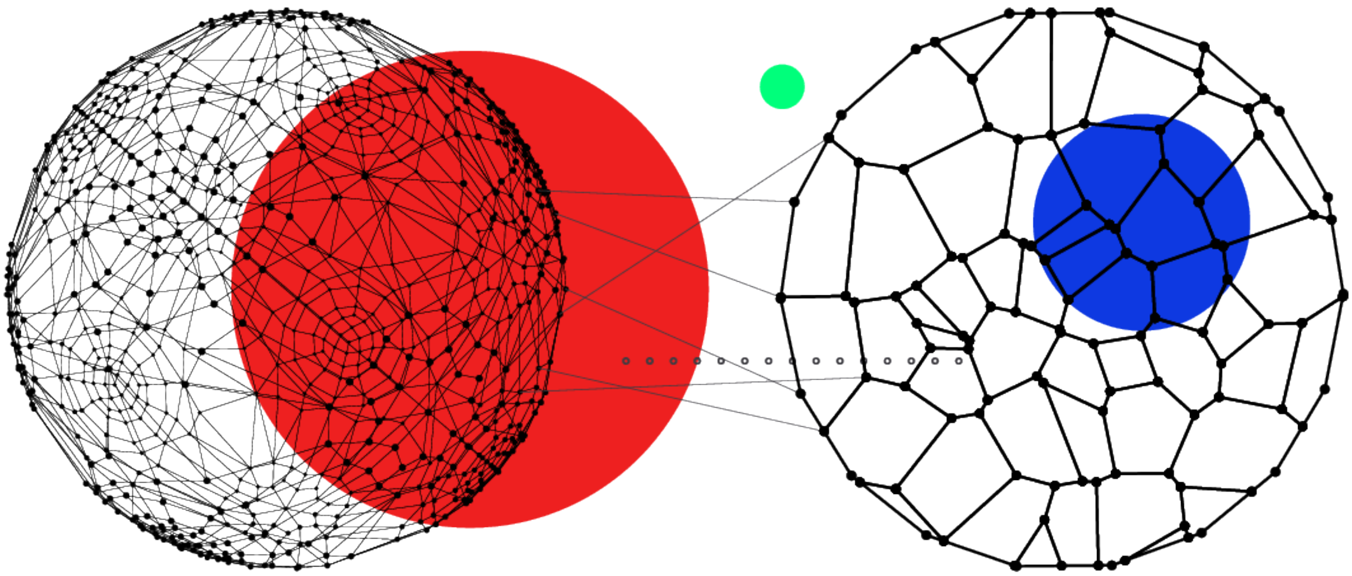


In this example, you can see the artworks based by their commercial status (consigned for sale, borrowed, owned by you), but you can also group artworks by medium types, locations, etc. and you can easily drag and drop the artwork from one category to another in this view if it needs to be moved.



You can click directly into the record of your choice from this view as well to see additional information, just click on the link/name to see the detail.

INTERACTIONS



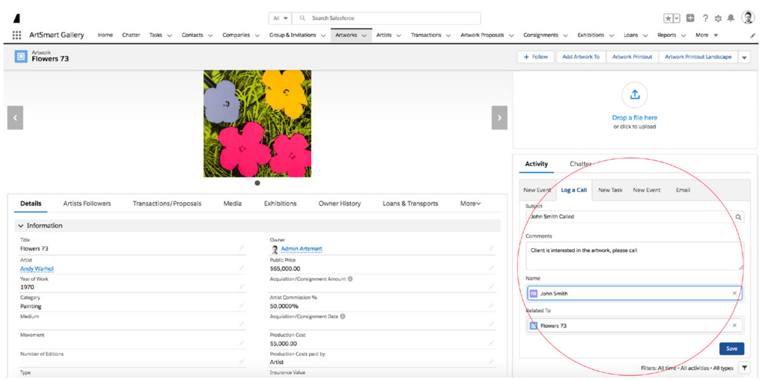
WITHIN THIS SECTION:

MANAGING INTERACTIONS WITH COLLECTORS/ GALLERIES / INSTITUTIONS

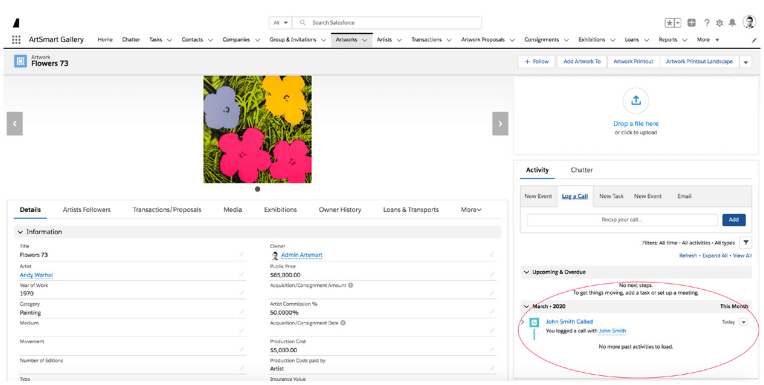
RECORD A TO-DO OR FUTURE ACTION

MANAGING INTERACTIONS WITH COLLECTORS / GALLERIES / INSTITUTIONS

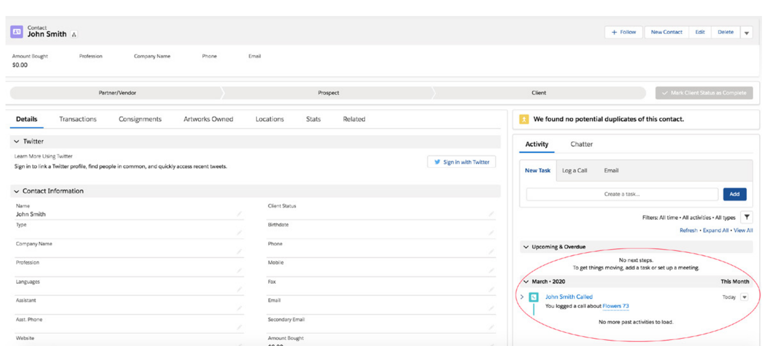
1. LOG A CALL related to an artwork by clicking on your artwork list from the top menu, clicking the artwork, and clicking LOG A CALL on the right hand side menu and inputting data about who the call was with, what it was about, and what needs to be done next.

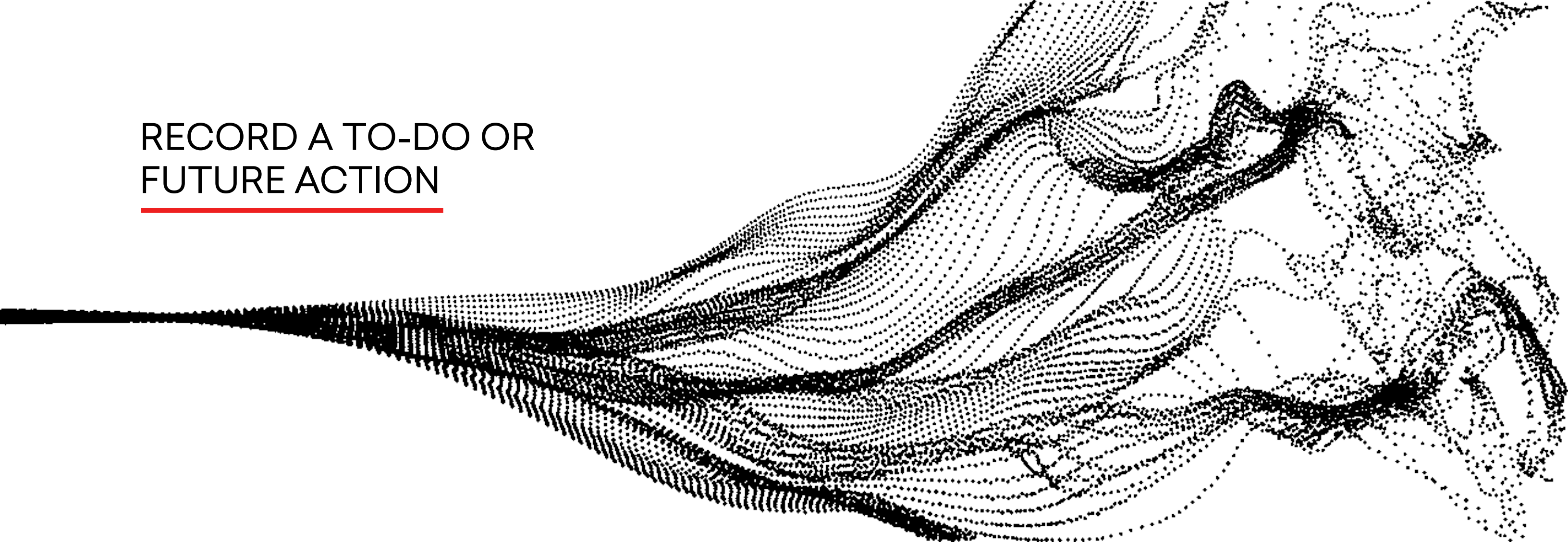


2. Click save to add this to your activity timeline for any given artwork.



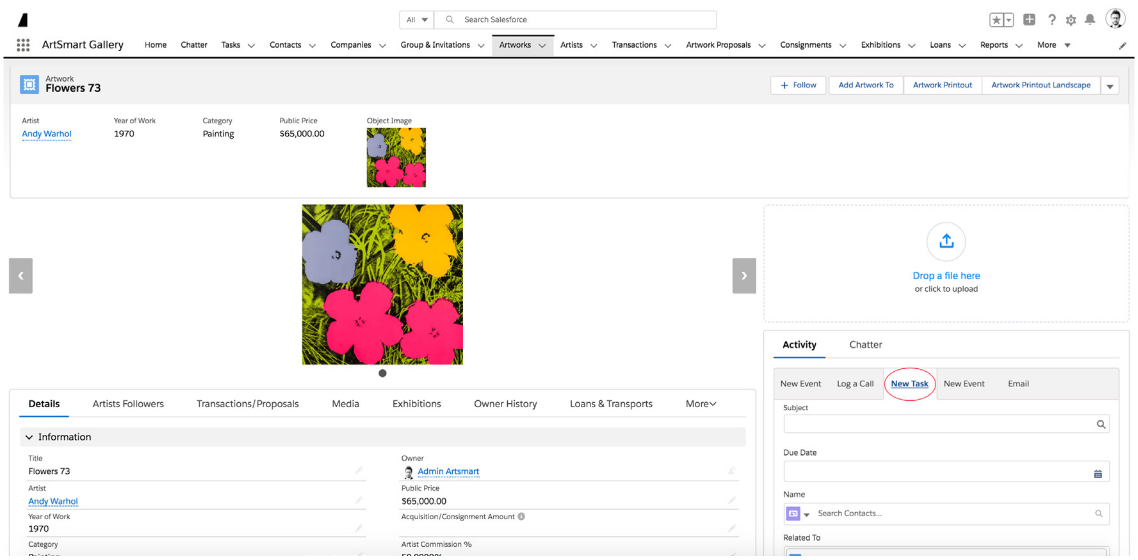
3. This activity will also be reflected at the contact level.



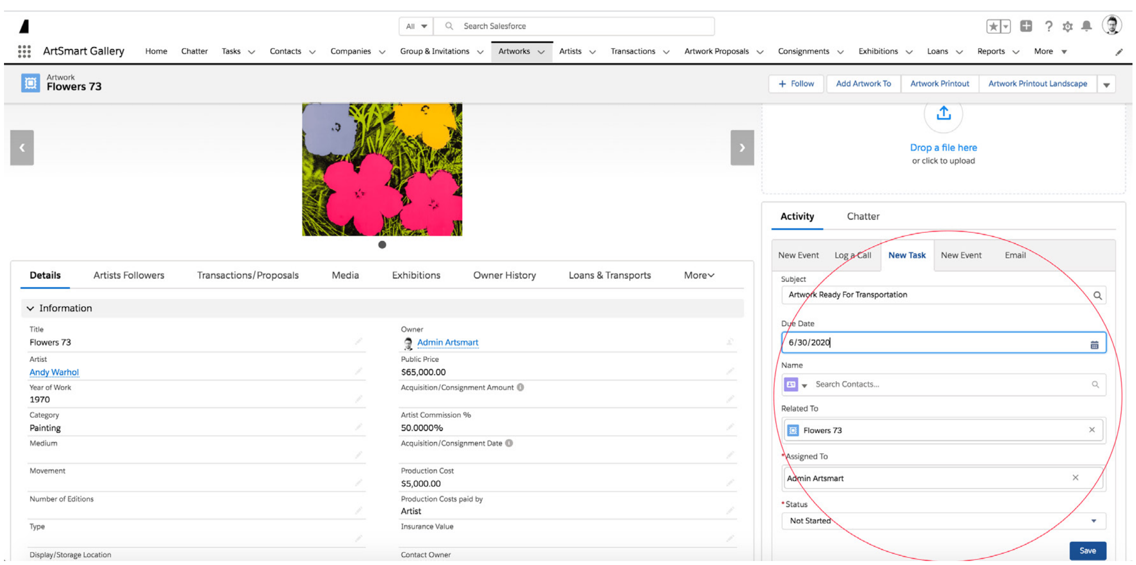


RECORD A TO-DO OR FUTURE ACTION

1. Click NEW TASK on the right hand side menu when you've clicked on a specific artwork.

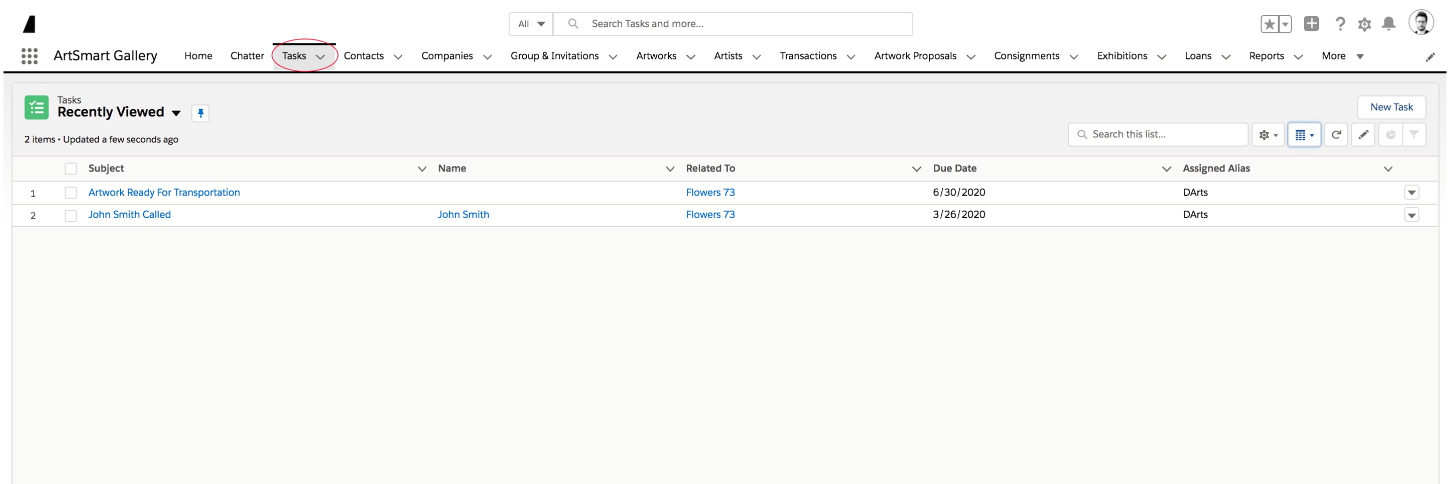


2. Enter the subject (for example, Get Artwork Ready for Transportation), due date, artwork it's related to and user the task has been given to (if you have multiple users on your ArtSmart App Account). Then click save.

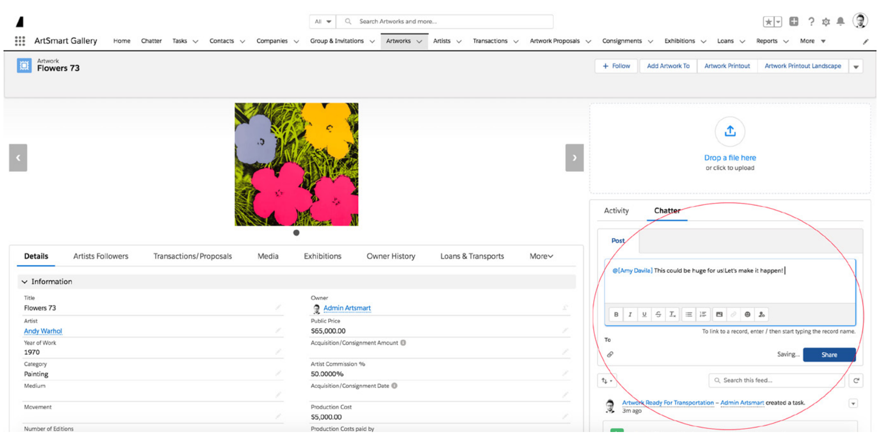


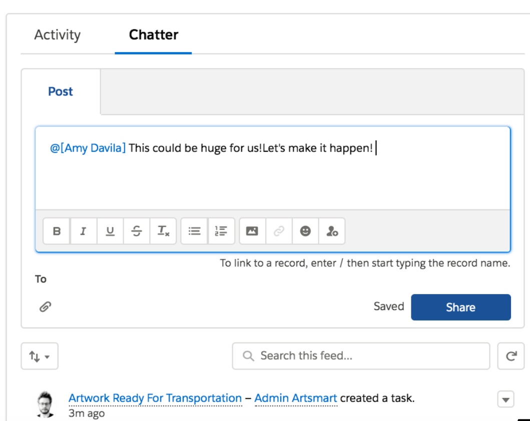
RECORD A TO-DO OR FUTURE ACTION

3. You can see a list of all your tasks by clicking TASKS button in your top menu.

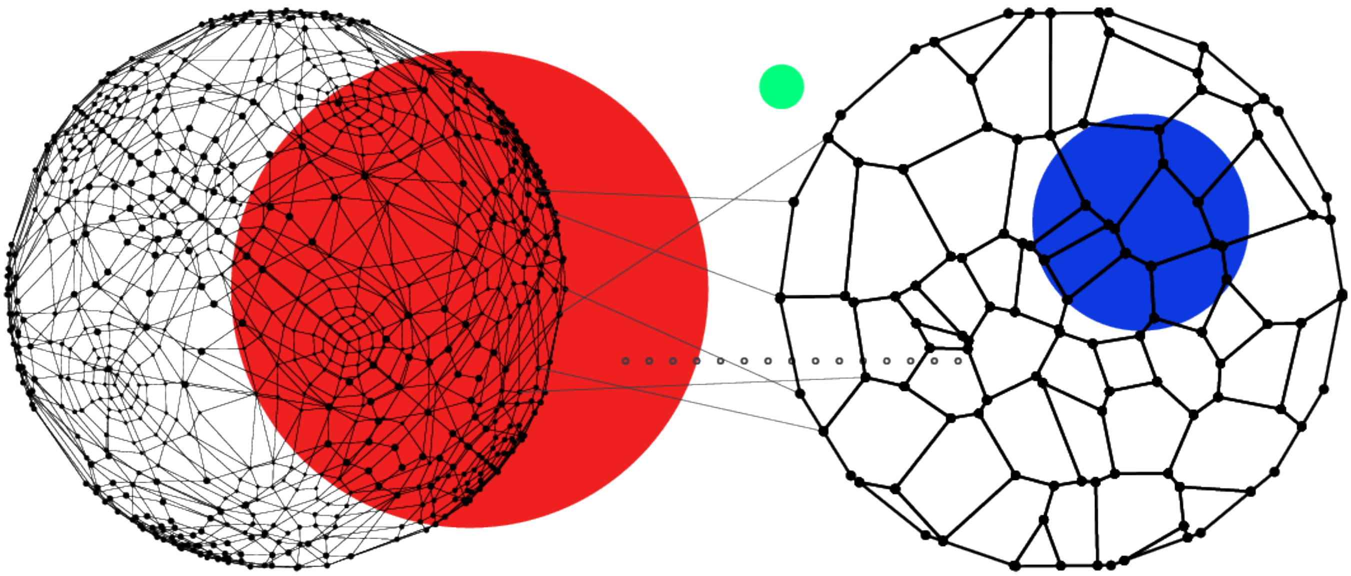


4. Once you have clicked on a specific artwork, in the Chatter Section, you can send messages to other administrators by typing @ before their name, selecting them, and writing them a message.





TRANSACTION MANAGEMENT

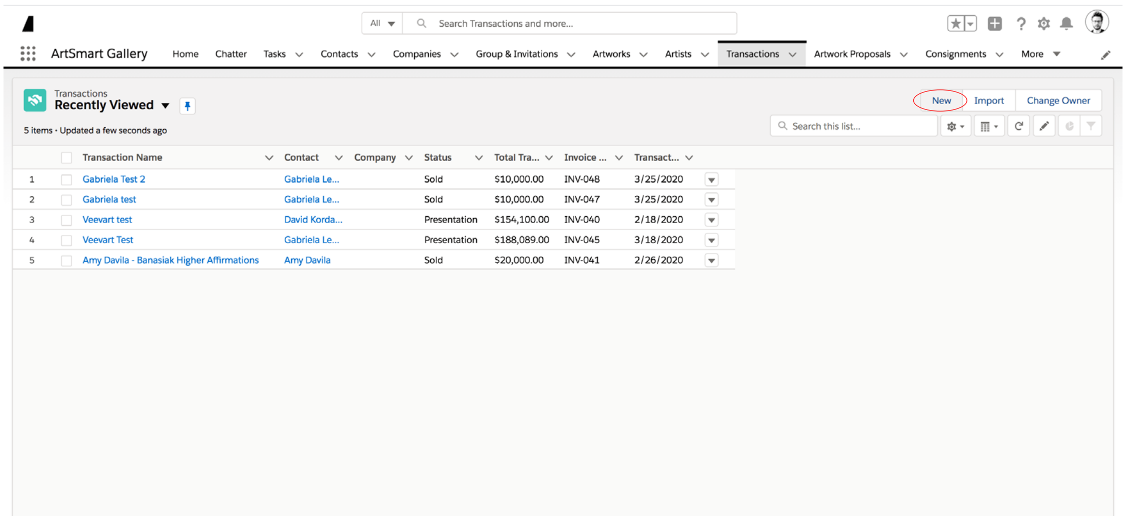


WITHIN THIS SECTION:

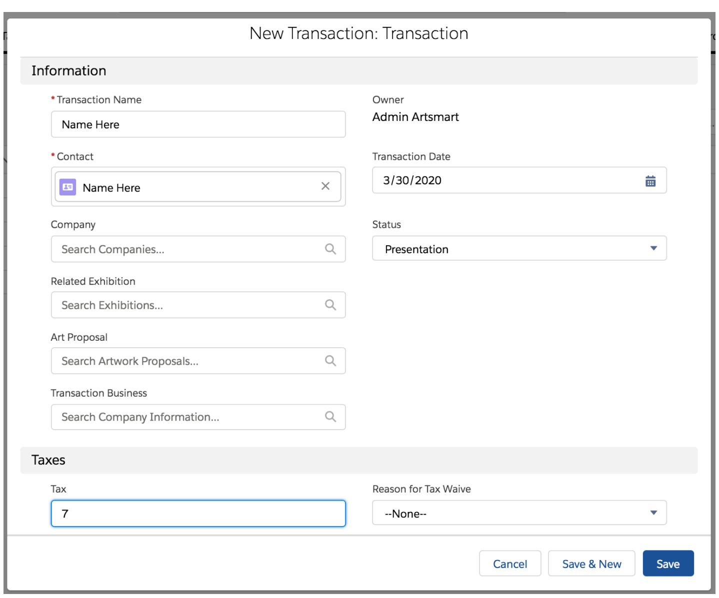
CREATE A TRANSACTION
ADD ARTWORKS
MODIFY PAYMENTS
MANAGE EXPENSES AND CHARGES
INVOICES
INVOICE SETTINGS
MARKED AS SOLD
PAYMENTS
ELECTRONIC INVOICES

CREATE A TRANSACTION:

1. Click NEW under the Transactions tab.



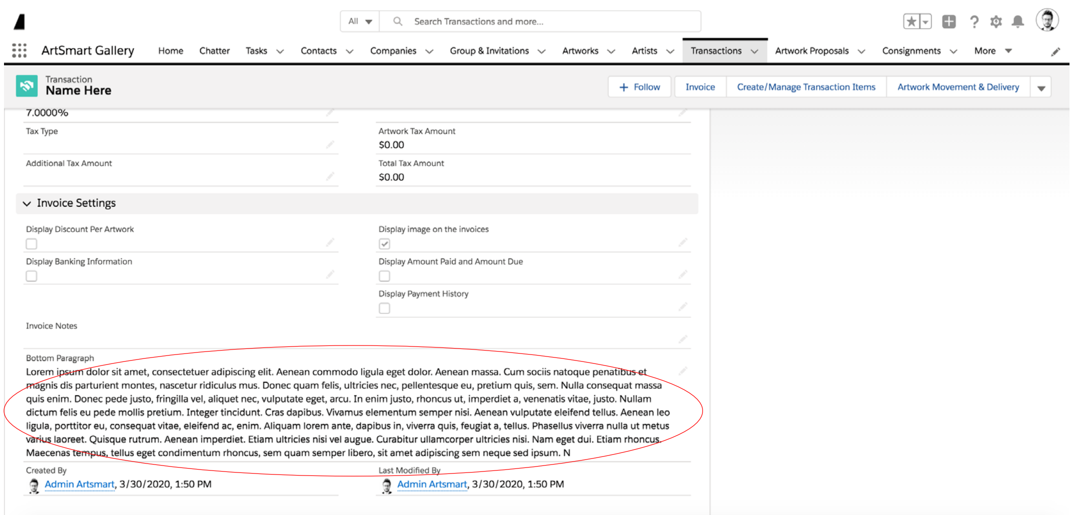
2. Fill in the desired fields:



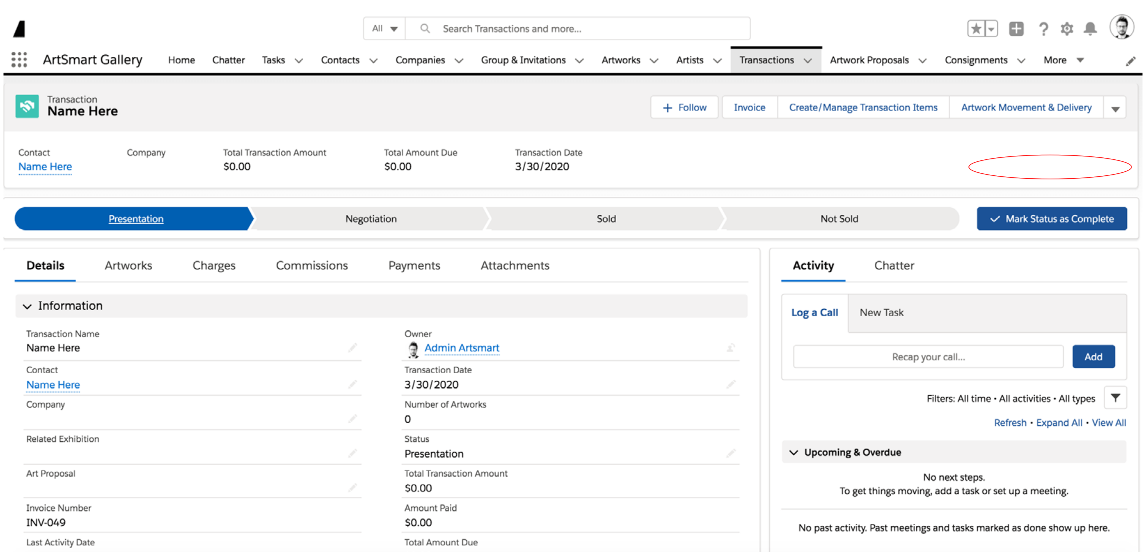
You must add a contact and tax rate to complete the form.
If this is a new client, you can create new contact from this form.

CREATE A TRANSACTION:

3. At the bottom of the page there is a paragraph that is a default disclaimer that appears on the invoice. This is prepared for you during the set up period.

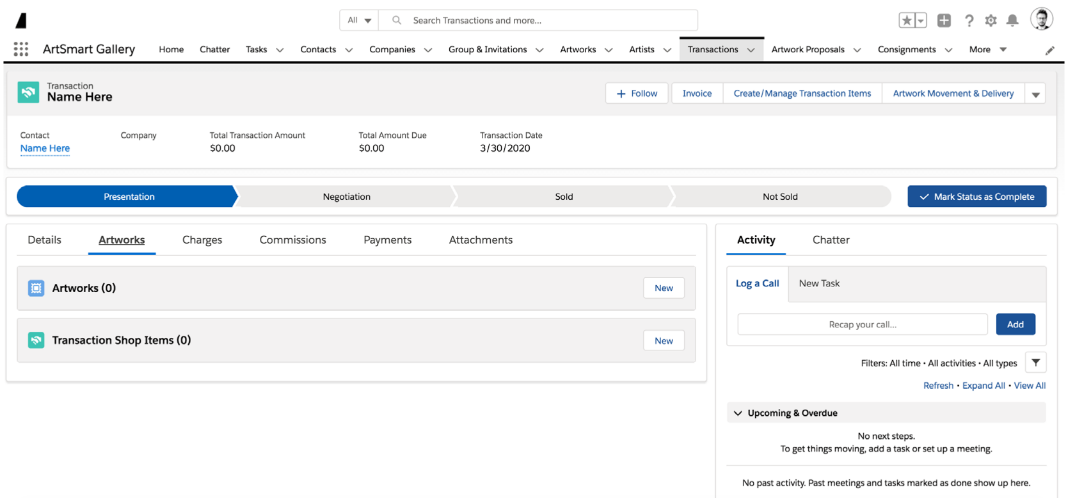


4. Within a Transaction you can see that there are phases which indicate the commercial status of the artwork. When you've reached each phase, you can mark each status as complete using this button. For example, the artwork can be in the presentation phase, negotiation phase, sold etc.

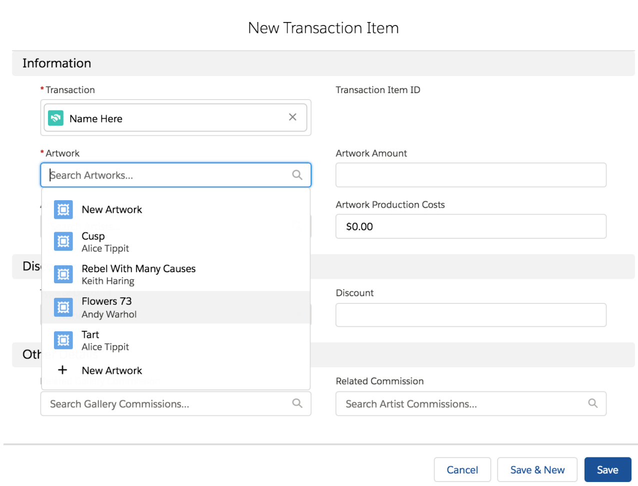


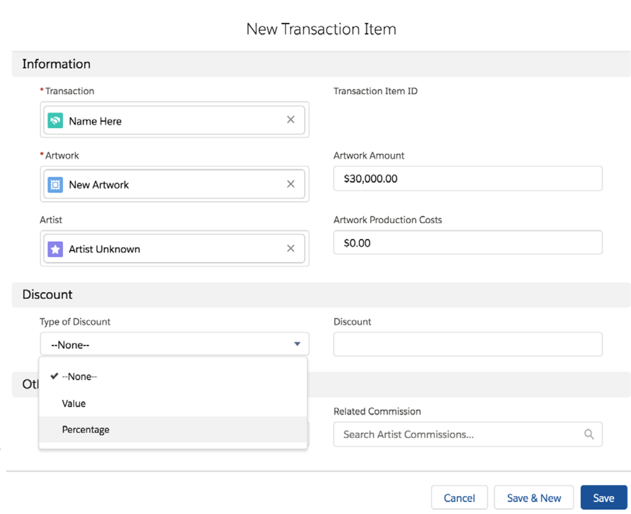
ADD ARTWORKS TO A TRANSACTION:

1. To add artworks, you must click the tab “Artworks” underneath the status bar. Click NEW to add artworks.

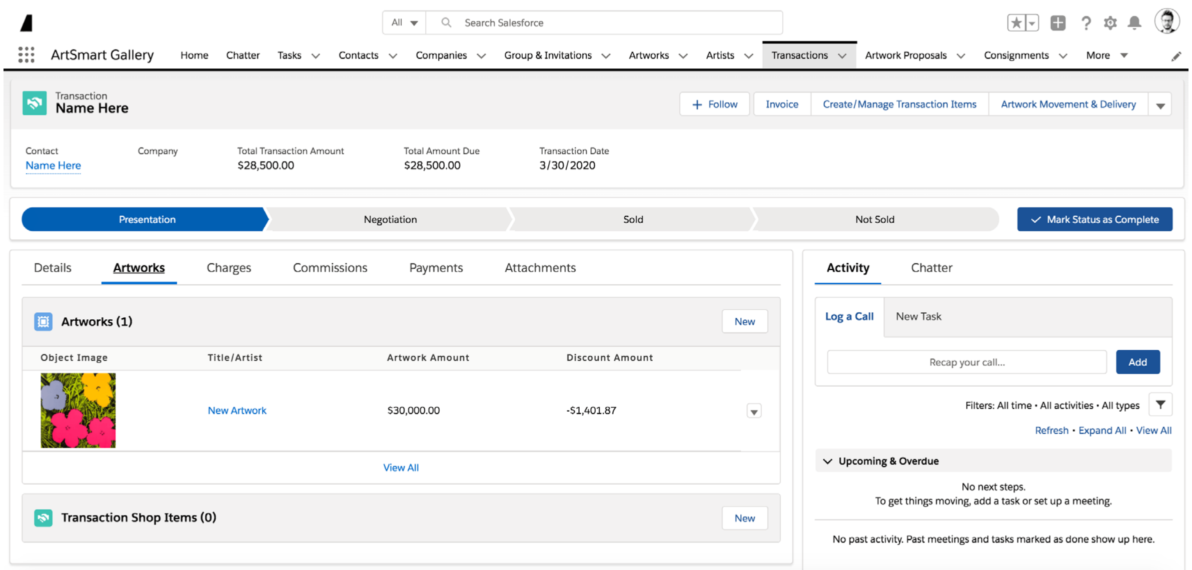


2. Fill out the New Transaction Item form by choosing artwork, artist, and price. Once you've chosen the artwork, you can add a discount using this feature which allows you to decide between discounting a value or percentage. Then save.

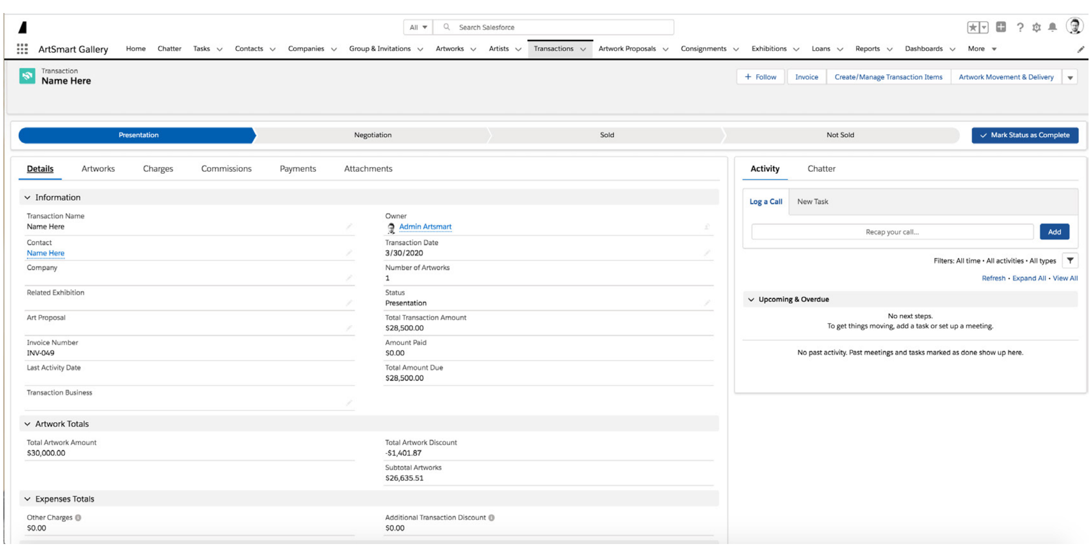




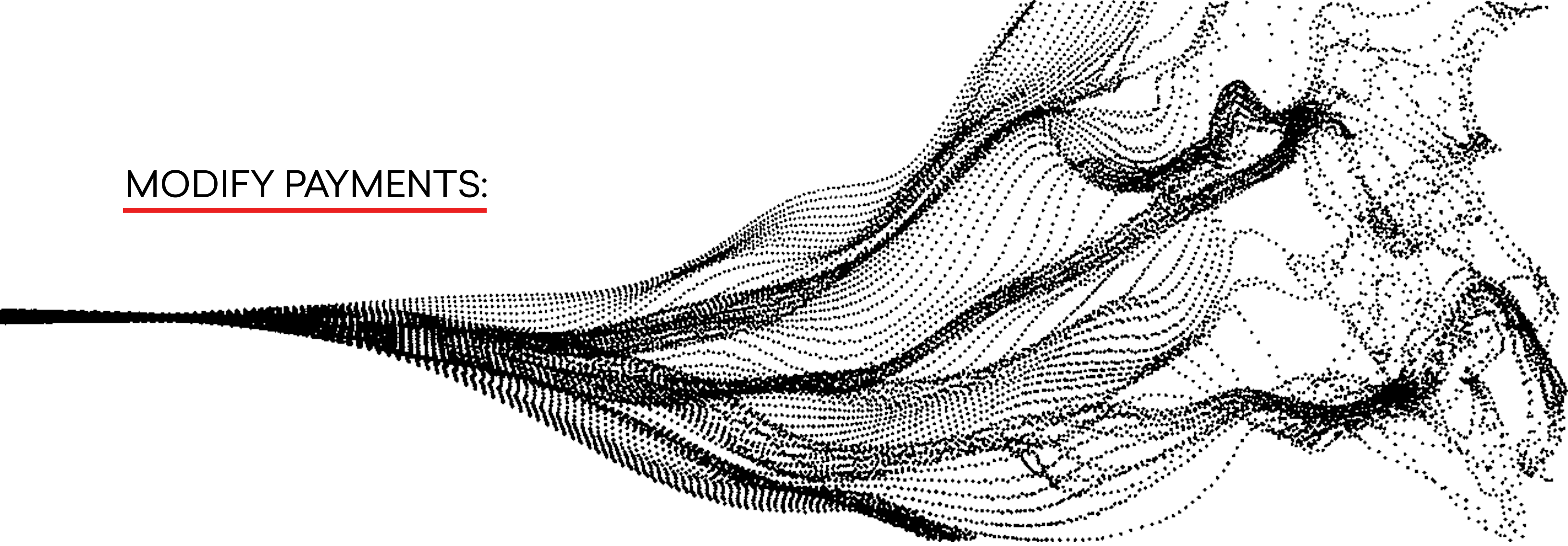
ADD ARTWORKS TO A TRANSACTION:



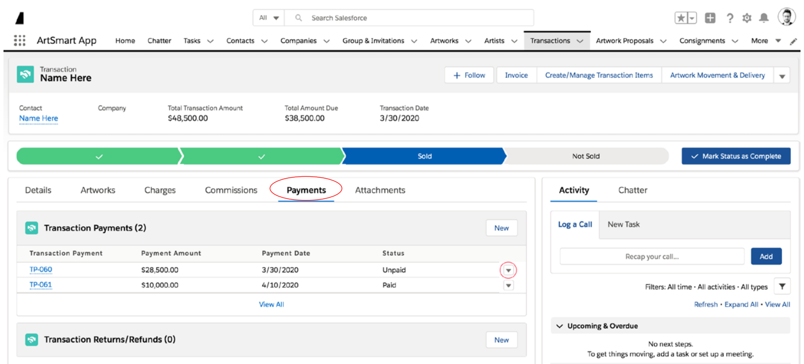
3. All information from artwork and contacts will be summarized and automatically updated in a Transaction. For example, when an item is added or deleted from the transaction, the default payment is automatically updated.



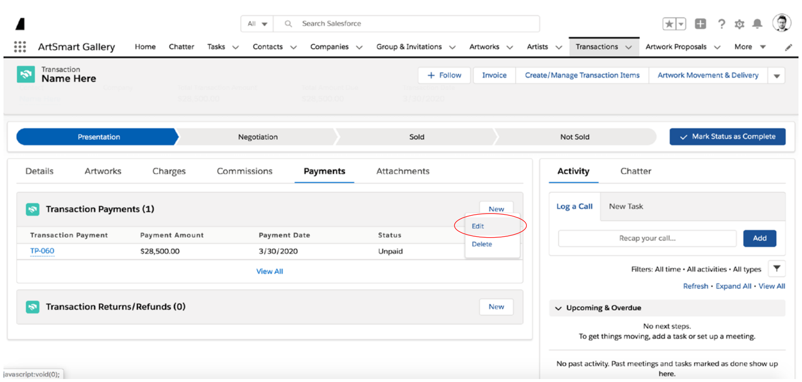
MODIFY PAYMENTS:



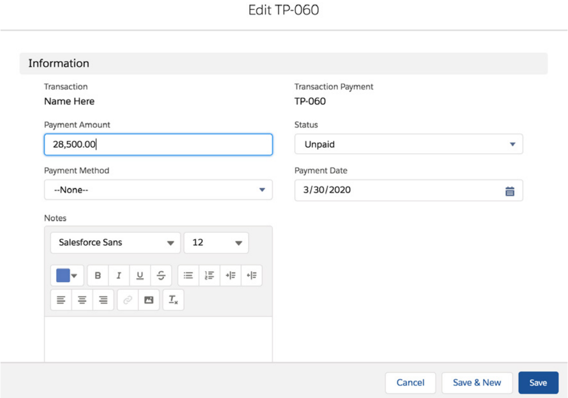
1. Start in the Payments tab under the status bar.
Click the arrow button to the right of the transaction's payment status.



2. Click edit from the drop-down presented on the screen.

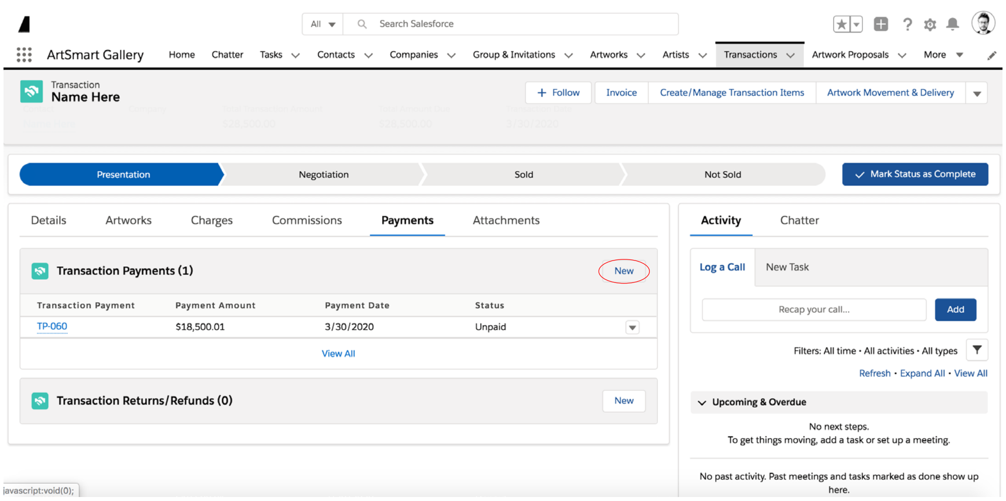


3. Edit the payment. Once completed, press save.

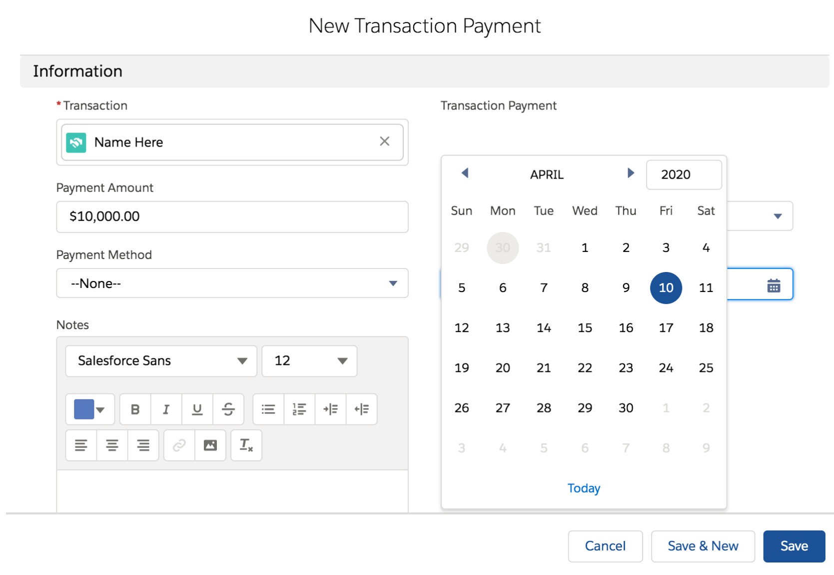


MODIFY PAYMENTS:

1. Create a new payment plan by clicking NEW.

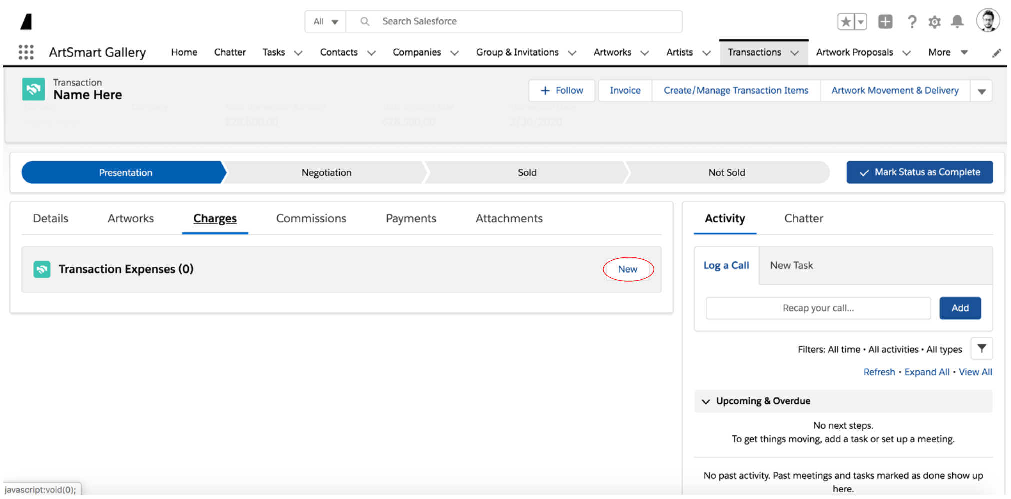


2. Fill out the remaining balance and set a date for when it should be paid.

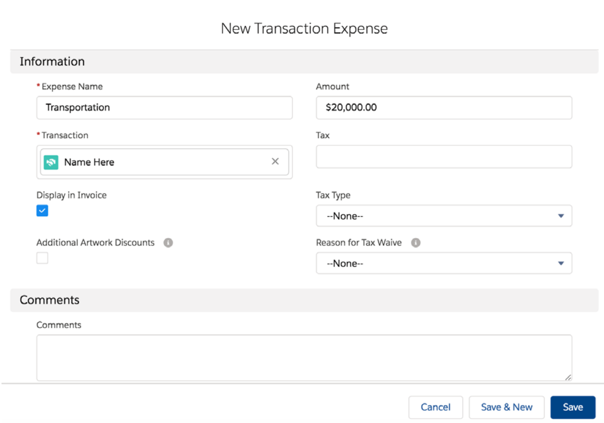


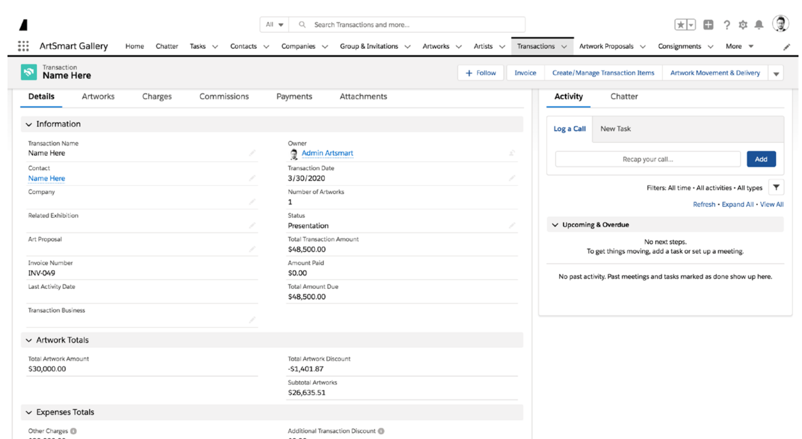
MANAGE EXPENSES AND CHARGES:

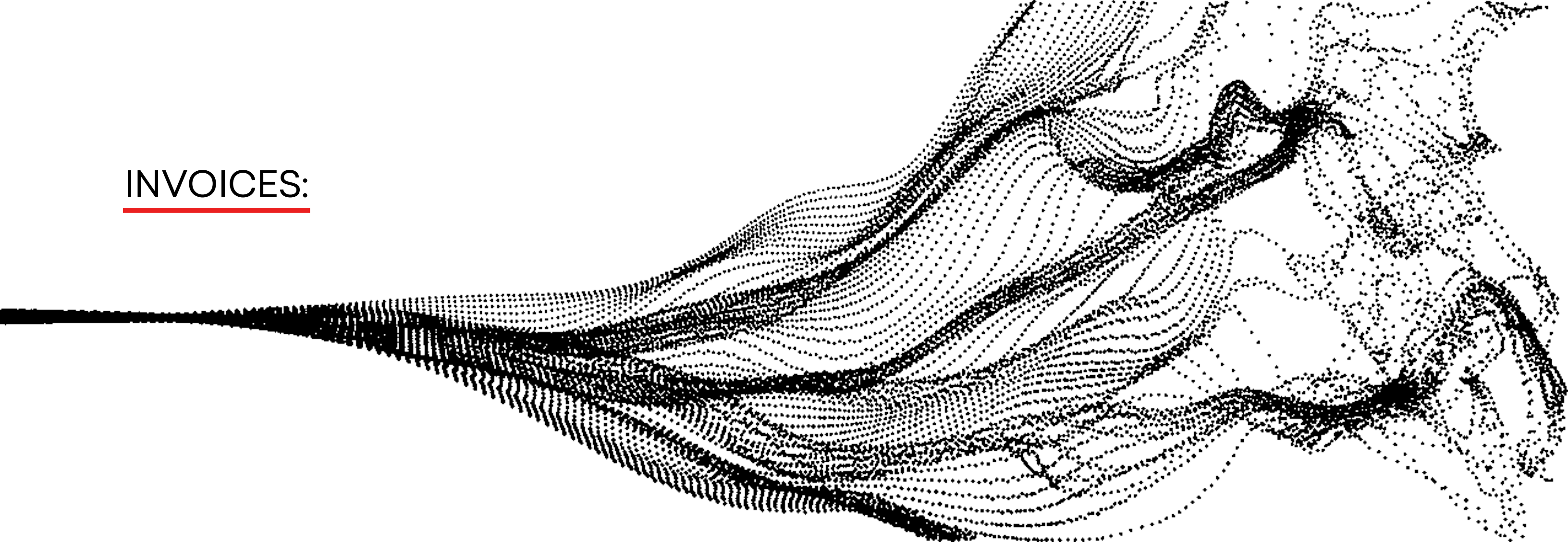
1. Start in the Charges tab underneath status bar.
Click NEW to add expenses.



2. Add an expense title and amount and press save.
You can create as many charges as necessary.
The expense is then summarized at the transaction level.

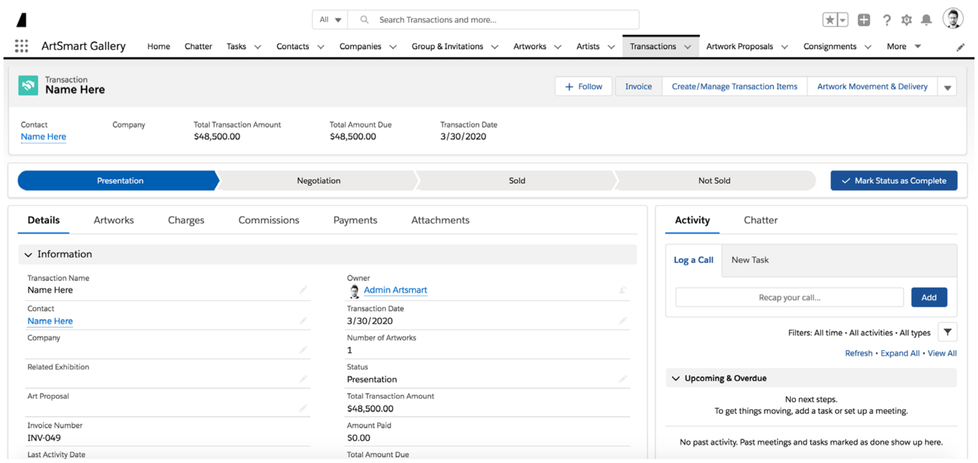






INVOICES:

1. Click INVOICE in the top right of the screen.



2. The invoice will include your company logo and your client's/artwork's information. It will also include subtotals, totals, and additional charges.

INVOICE: INV-049 **MARCH 30, 2020**

Company Information
ArtSmart
135 Boulevard Malesherbes
Paris, 75017, France

Client Information
Name Here
email@email.com

ARTWORK	PRICE
Title: New Artwork	**$30,000.00**

Total Artworks Amount	$30,000.00
Total Artworks Discount	-$1,401.87
Subtotal artworks	$26,635.51

Charges	Charge Amount
Transportation	$20,000.00
Subtotal Expenses	$20,000.00

Total Tax Amount	$1,864.49
Total transaction amount	**$48,500.00**

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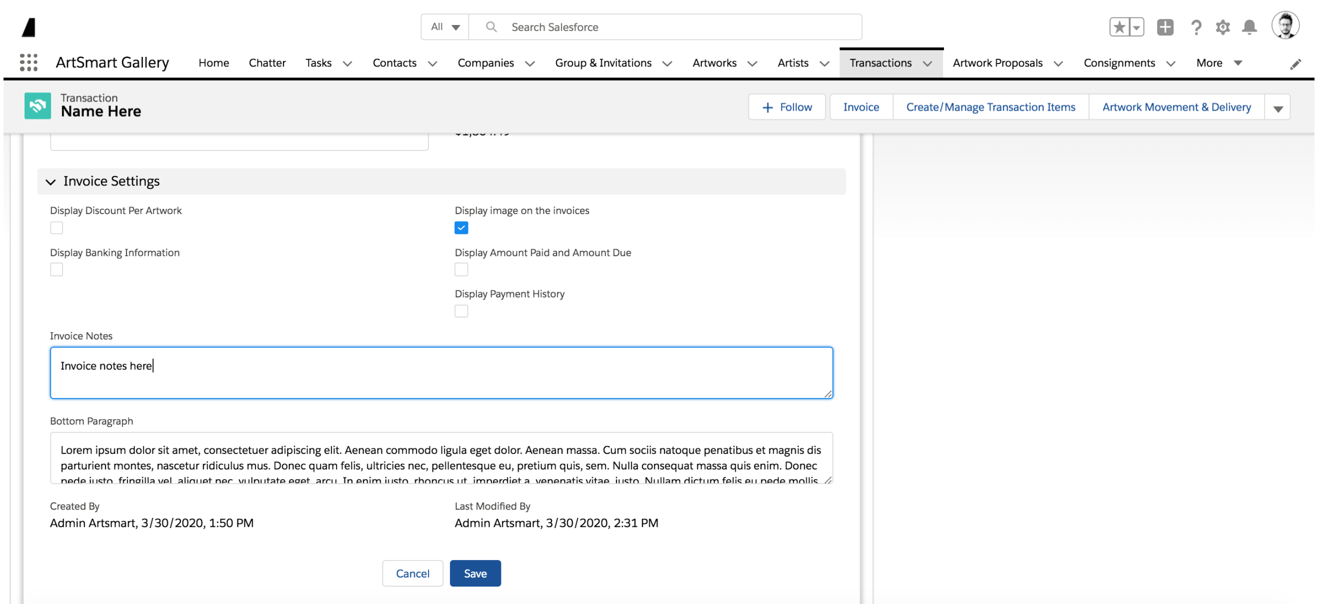
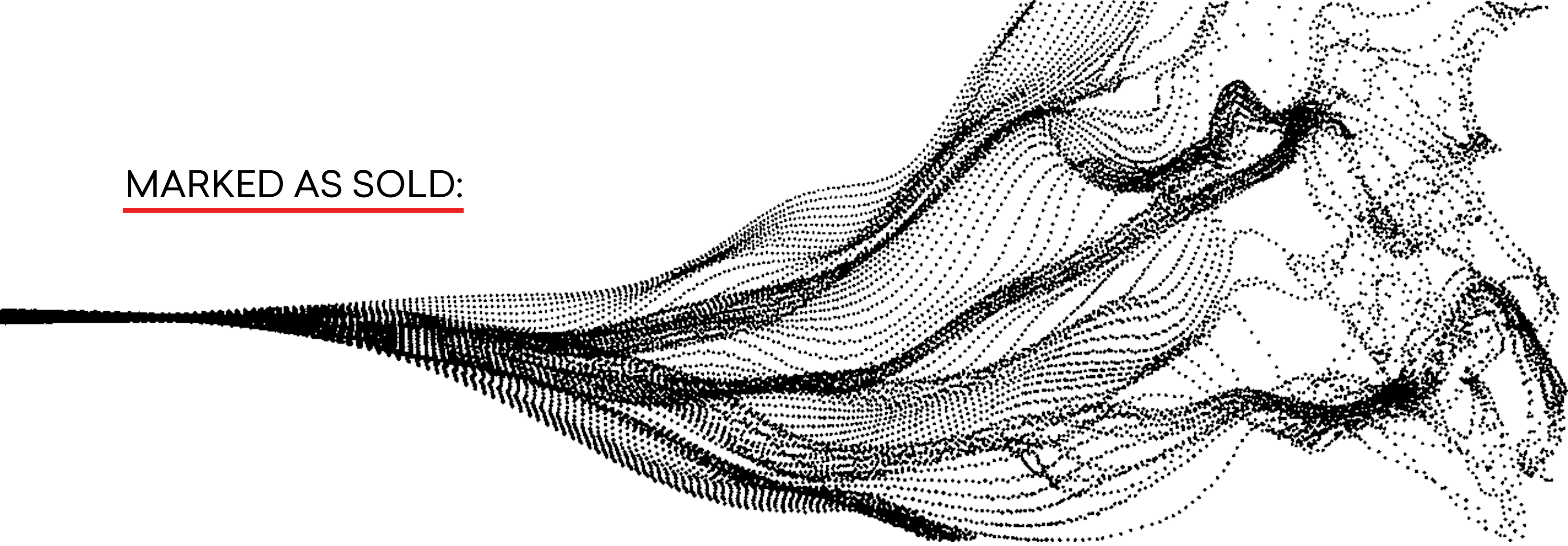
INVOICE SETTINGS:

There are several invoice settings to choose from:
- Discounts appear both in summary and by the artwork.
- Display images on your invoice, amount paid and amount due.
- Display payment plan or history, as well as your banking information.

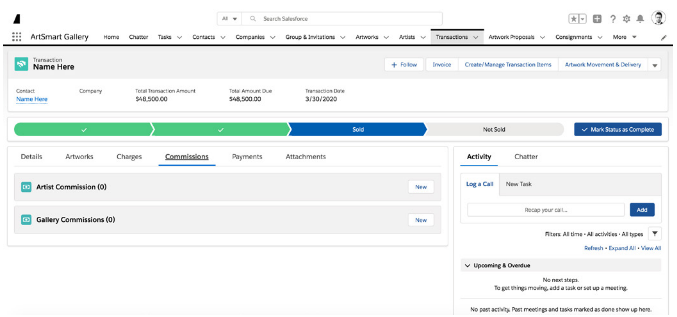
You can add invoice notes, and modify the disclaimer for specific transactions.

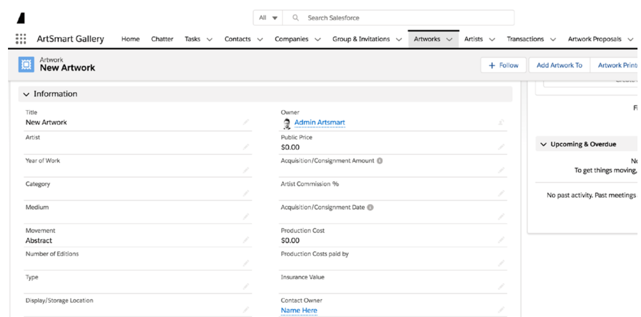




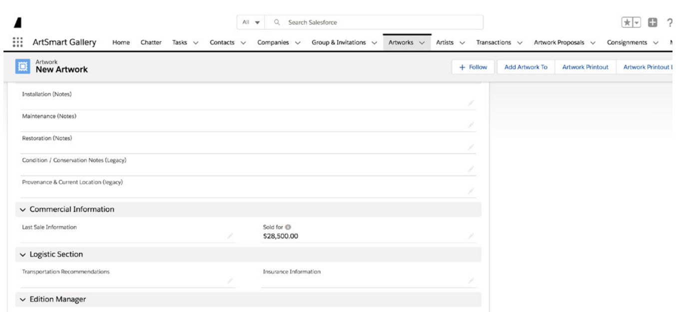
MARKED AS SOLD:

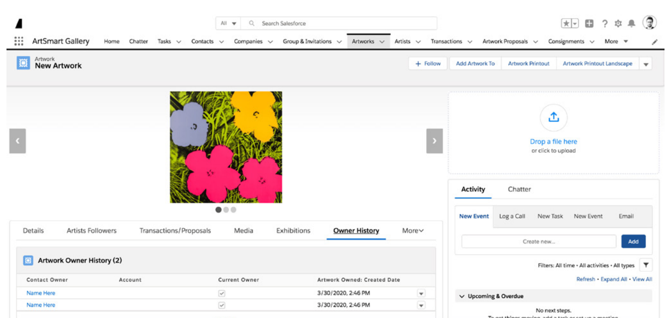
Once your transaction is marked as sold:
- Commissions are produced.
- Client now appears as owner of the artwork.



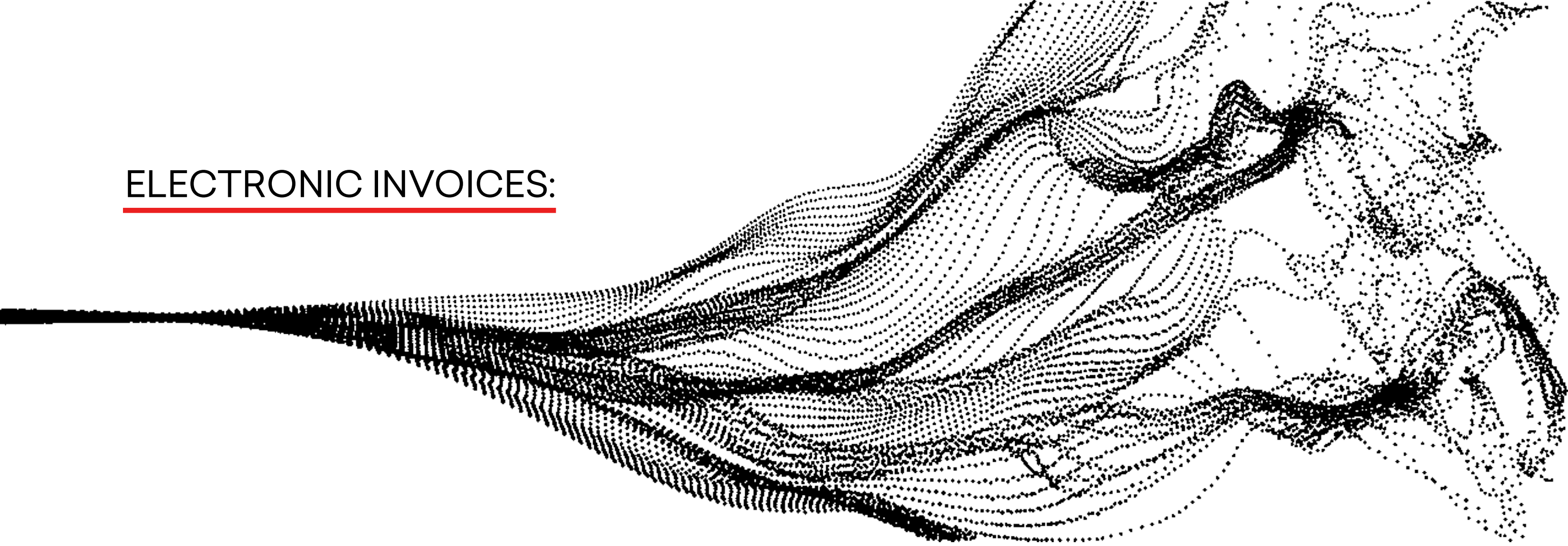


- The status of the artwork changes to sold and price is documented.
- Information is also recorded in the history of the artworks.



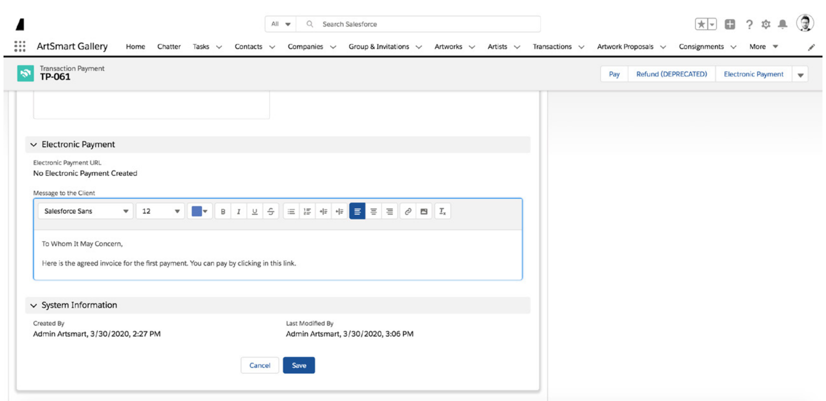


ELECTRONIC INVOICES:



You can send electronic invoices to your clients.
Contact your account executive to have this feature enabled.

1. Create a message to your client and then click save.



2. Click ELECTRONIC PAYMENT at the top right of the page.
Enter the email and send invoice. Client can pay via the email sent.