

ARTSMART ARCHIVE APP QUICK GUIDE

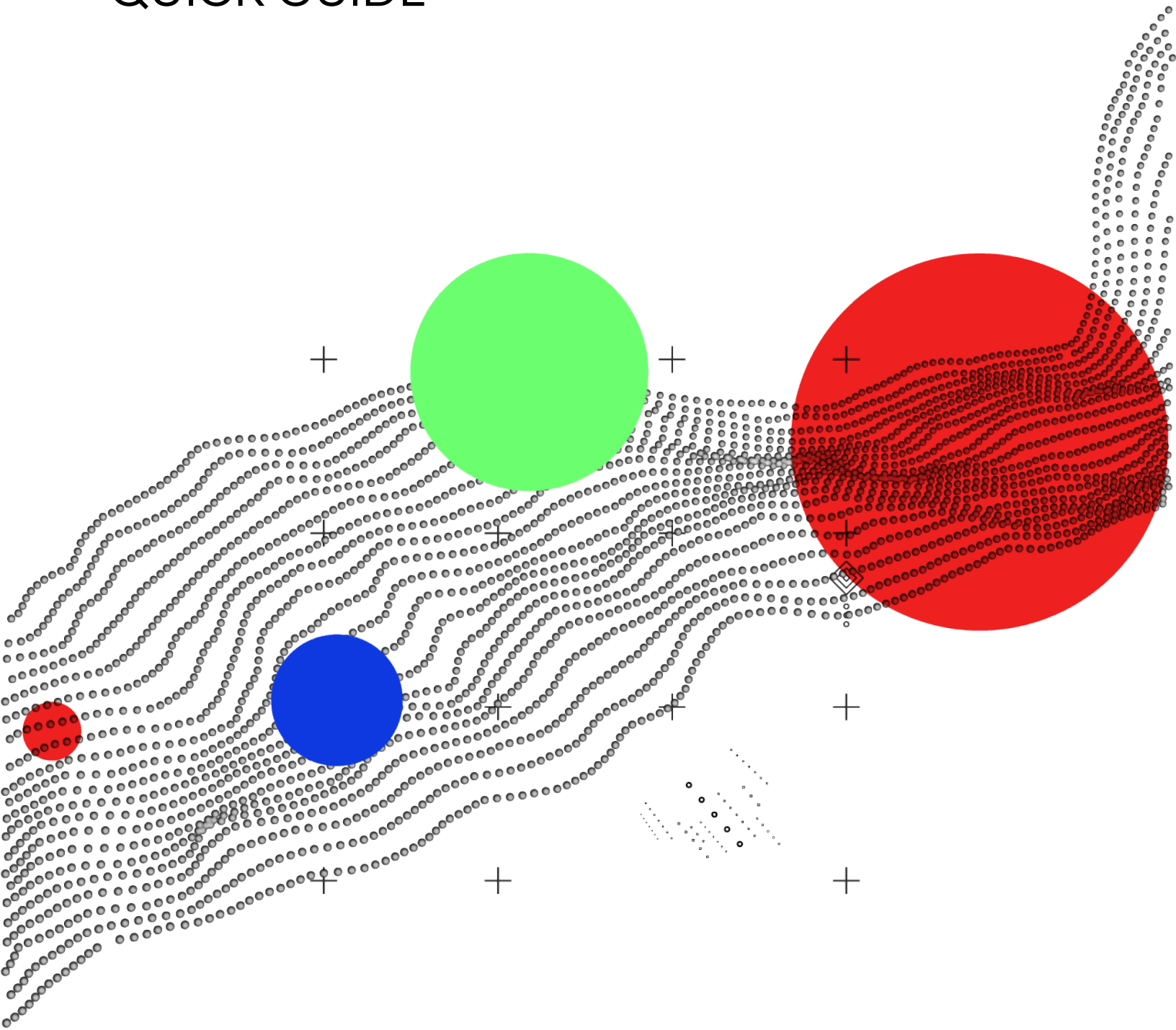
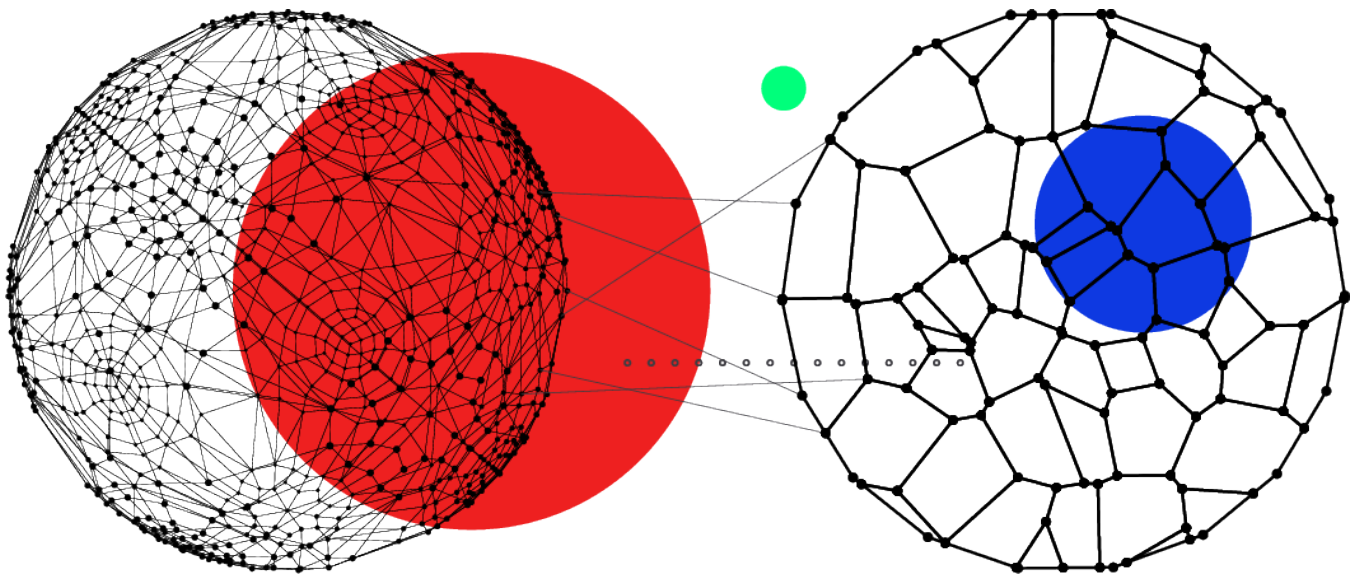


TABLE OF CONTENTS

YOUR COMPANY	3
- ACCESSING YOUR COMPANY INFORMATION	4
- ADDING A LOGO	5
MANAGING COMPANIES AND CONTACTS	6
- CREATE A COMPANY	7
- CREATE A CONTACT	9
ADDING AN ARTWORK TO INVENTORY	12
GENERATING A LIST OF ARTWORKS	17
- CREATING A LIST	18
- MANAGING A LIST	22
INTERACTIONS	26
- MANAGING INTERACTIONS WITH COLLECTORS/ GALLERIES / INSTITUTIONS	27
- RECORD A TO-DO OR FUTURE ACTION	28
TRANSACTION MANAGEMENT	30
- CREATE A TRANSACTION	31
- ADD ARTWORKS TO A TRANSACTION	33
- MODIFY PAYMENTS	35
- MANAGE EXPENSES AND CHARGES	37
- INVOICES	38
- INVOICE SETTINGS	39
- MARKED AS SOLD	40
- ELECTRONIC INVOICES	41

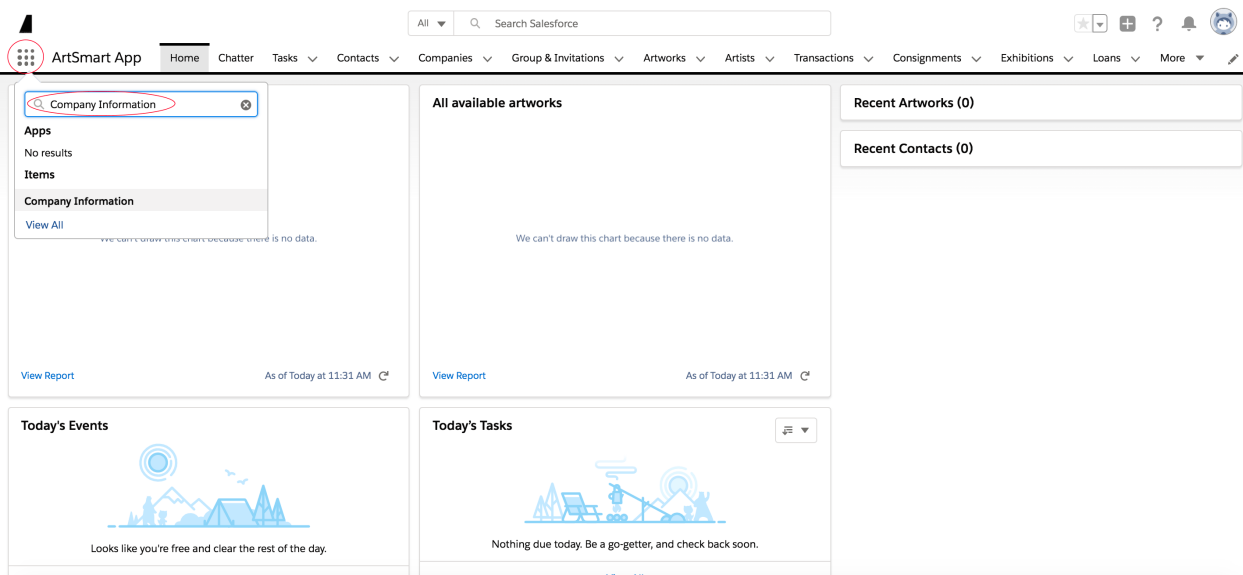
YOUR COMPANY



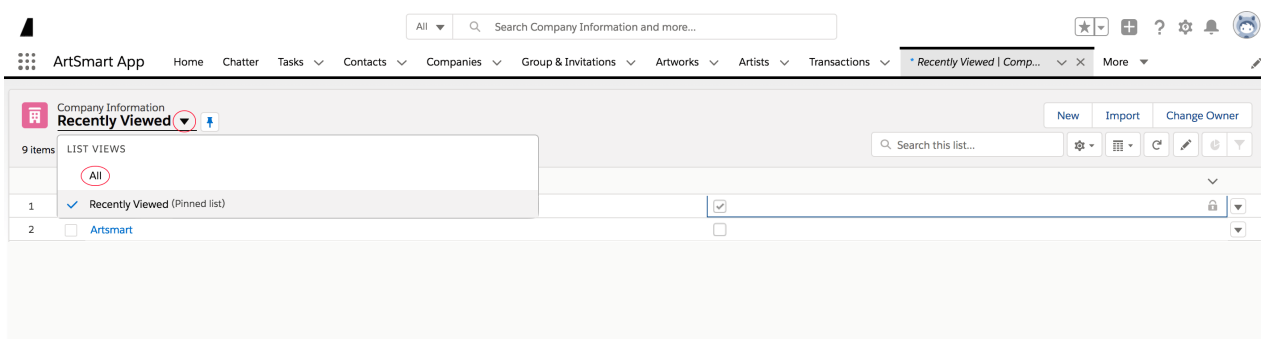
WITHIN THIS SECTION:
ACCESSING YOUR COMPANY INFORMATION
ADDING A LOGO

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.

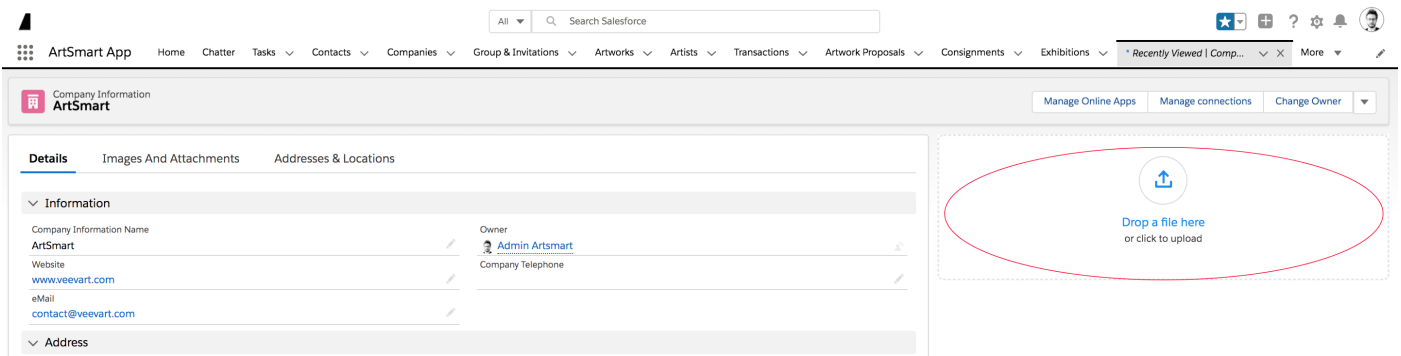


Once you've selected All, the record of your gallery should appear.

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

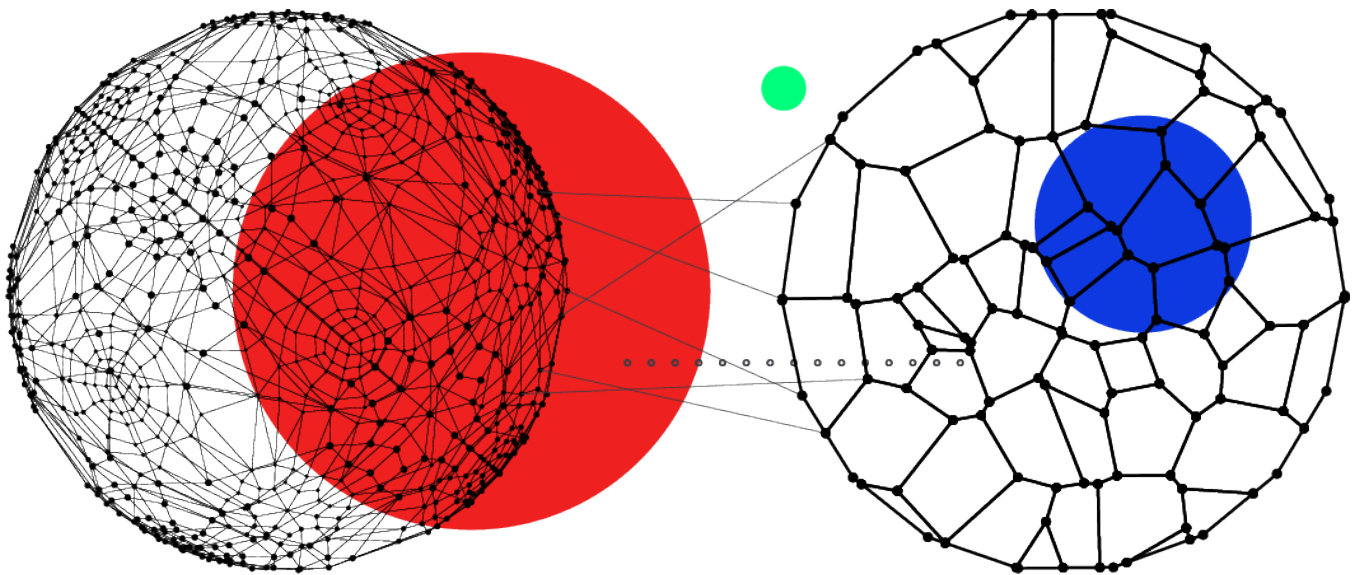
Once in your company information you just drag and drop your logo into the window:



Test the different documents to ensure the logo appears:

- Artworks printout
- Artworks lists
- Artworks lists with price
- Invoices

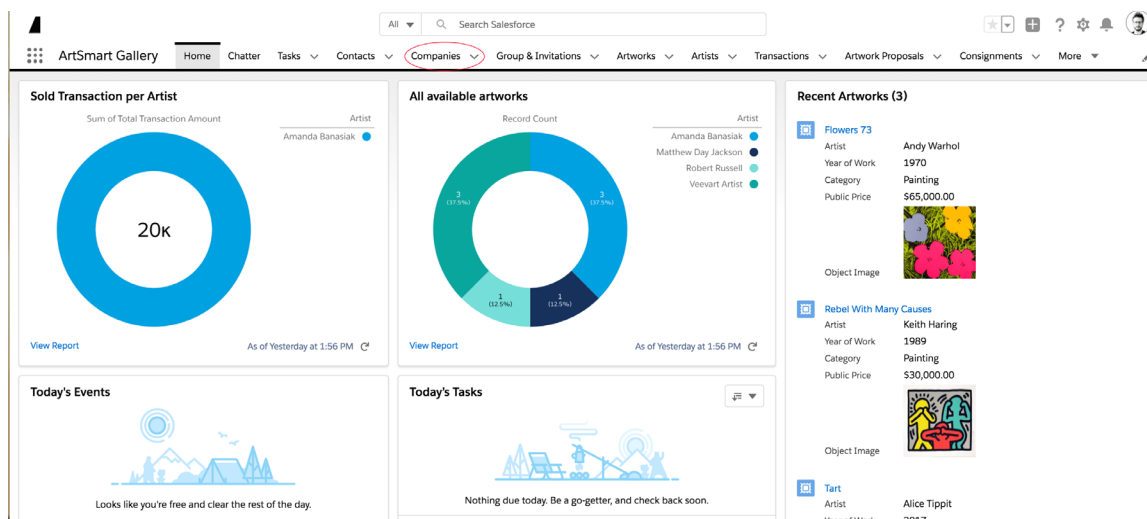
MANAGING COMPANIES AND CONTACTS



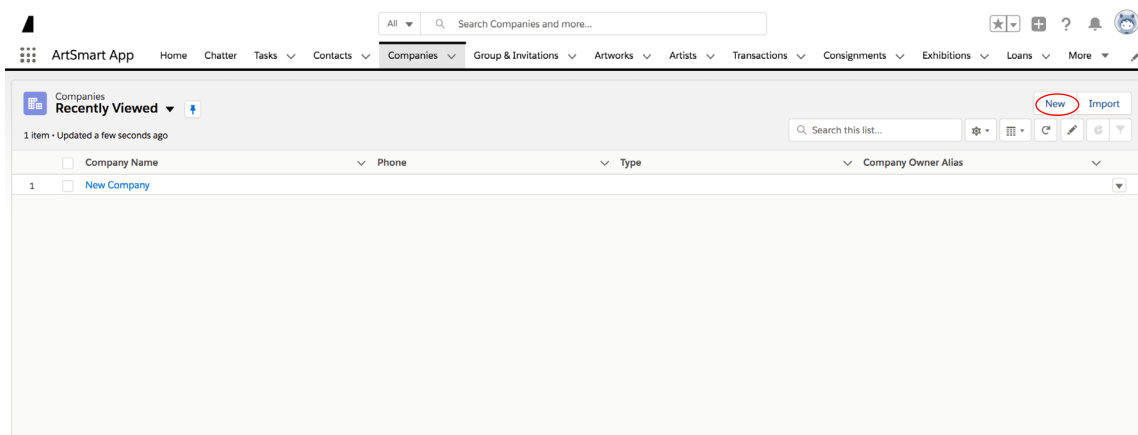
WITHIN THIS SECTION:
CREATE A COMPANY
CREATE A CONTACT

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.



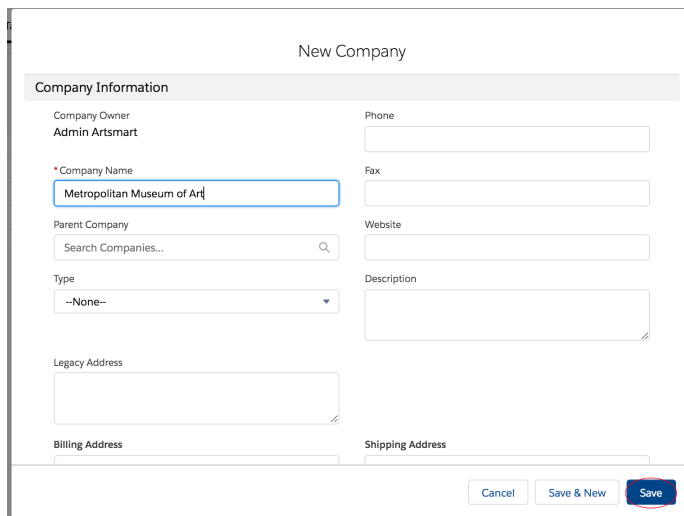
2. Then click the New button in the top right corner.



*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.

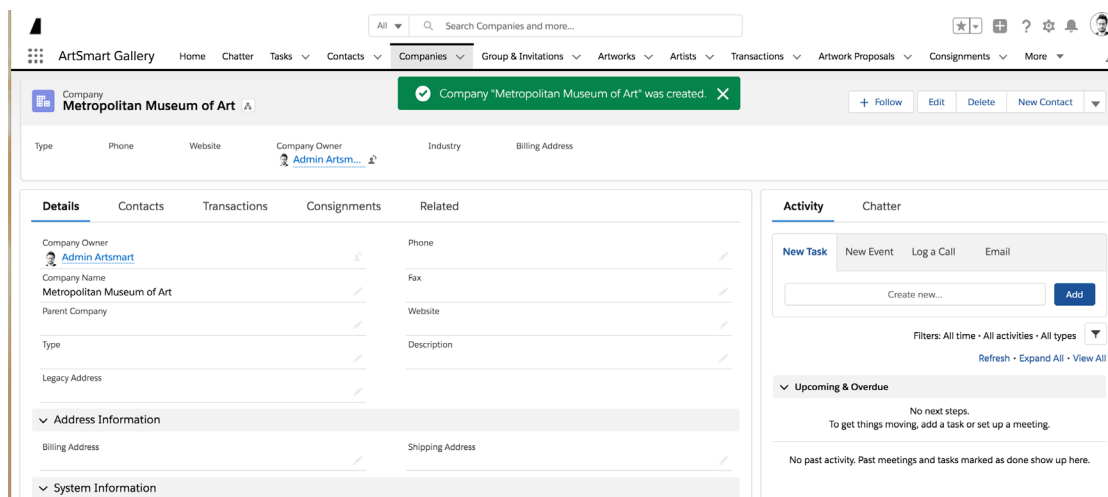


The screenshot shows the 'New Company' form in the ArtSmart Gallery application. The form is titled 'New Company' and contains several sections for data entry:

- Company Information:**
 - Company Owner: Admin Artsmart
 - * Company Name: Metropolitan Museum of Art
 - Parent Company: Search Companies...
 - Type: --None--
- Phone:** (Empty field)
- Fax:** (Empty field)
- Website:** (Empty field)
- Description:** (Empty text area)
- Legacy Address:** (Empty text area)
- Billing Address:** (Empty text area)
- Shipping Address:** (Empty text area)

At the bottom right, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

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

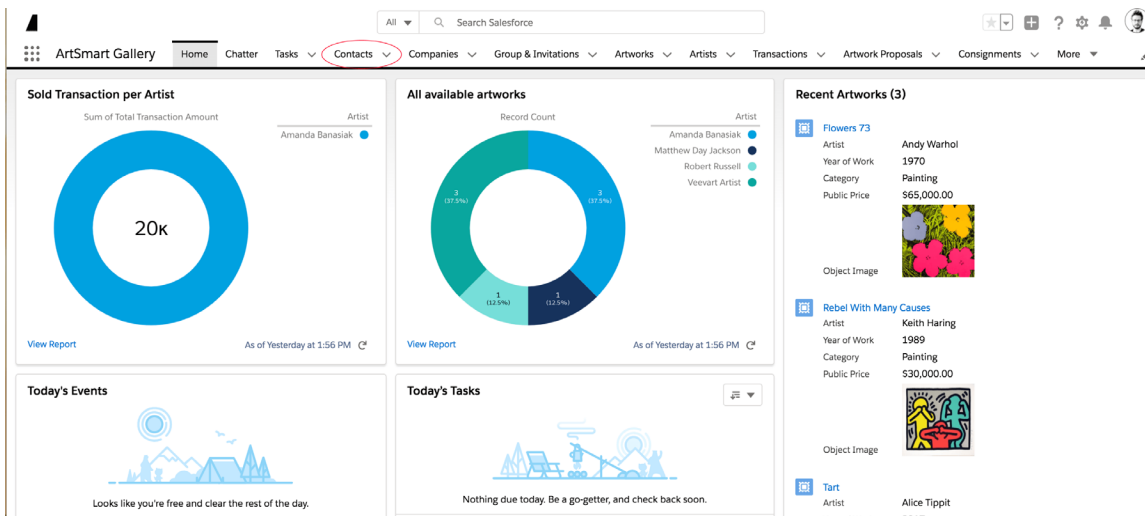


The screenshot shows the company contact page for 'Metropolitan Museum of Art' in the ArtSmart Gallery application. The page has a navigation bar at the top with various tabs like 'Home', 'Chatter', 'Tasks', 'Contacts', 'Companies', etc. The main content area is divided into two columns:

- Details:**
 - Company Owner: Admin Artsmart
 - Company Name: Metropolitan Museum of Art
 - Parent Company: (Empty field)
 - Type: (Empty field)
 - Legacy Address: (Empty field)
 - Address Information:**
 - Billing Address: (Empty field)
 - Shipping Address: (Empty field)
 - System Information:** (Empty field)
- Activity:**
 - Chatter: (Empty field)
 - Filters: All time • All activities • All types
 - Upcoming & Overdue: No next steps. To get things moving, add a task or set up a meeting.
 - Past activity: No past activity. Past meetings and tasks marked as done show up here.

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.

The screenshot shows the ArtSmart Gallery Contacts page. The top navigation bar includes 'Home', 'Chatter', 'Tasks', 'Contacts' (highlighted with a red circle), 'Companies', 'Group & Invitations', 'Artworks', 'Artists', 'Transactions', 'Artwork Proposals', 'Consignments', and 'More'. The page displays a list of 12 contacts under the 'Recently Viewed' tab. The 'New' button in the top right corner is highlighted with a red circle.

	Name	Company Name	Phone	Email	Contact Owner Alias
1	Gabriela Lengua	Veevart			Jennifer
2	Alison Agsten				ZC
3	Ally Mintz	Leila Heller Gallery			ZC
4	Amy Davila			amy@artsmartinc.com	ZC
5	John Baldessari				ZC
6	Zoe Crosher	Zoe Crosher Studio			ZC
7	Kim Schoen				ZC
8	Amy Davila				DArts
9	Thao Nguyen				ZC
10	Sarah Watson				ZC
11	Robert Russell				Robert
12	Robert Russell				DArts

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.

New Contact

Contact Information

* Name	Client Status
Salutation --None--	--None--
First Name	
* Last Name	
Type --None--	Birthdate
Company Name Search Companies...	Phone
Metropolitan Museum of Art	Mobile
Arny Davila ArtSmart Gallery	

Cancel Save & New Save

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

Professional Address	Personal Address
<input type="text"/>	<input type="text"/>
Professional Street	Personal Street
<input type="text"/>	1234 Street Name Goes Here
Professional City	Personal City
<input type="text"/>	City
Professional State/Province	Personal State/Province
<input type="text"/>	CA
Professional Zip/Postal Code	Personal Zip/Postal Code
<input type="text"/>	12345
Professional Country	Personal Country
<input type="text"/>	<input type="text"/>
Legacy Address	Mailing Preference
<input type="text"/>	Professional Address

System Information

Contact Owner
Admin Artsmart

Cancel Save & New Save

CREATE A CONTACT

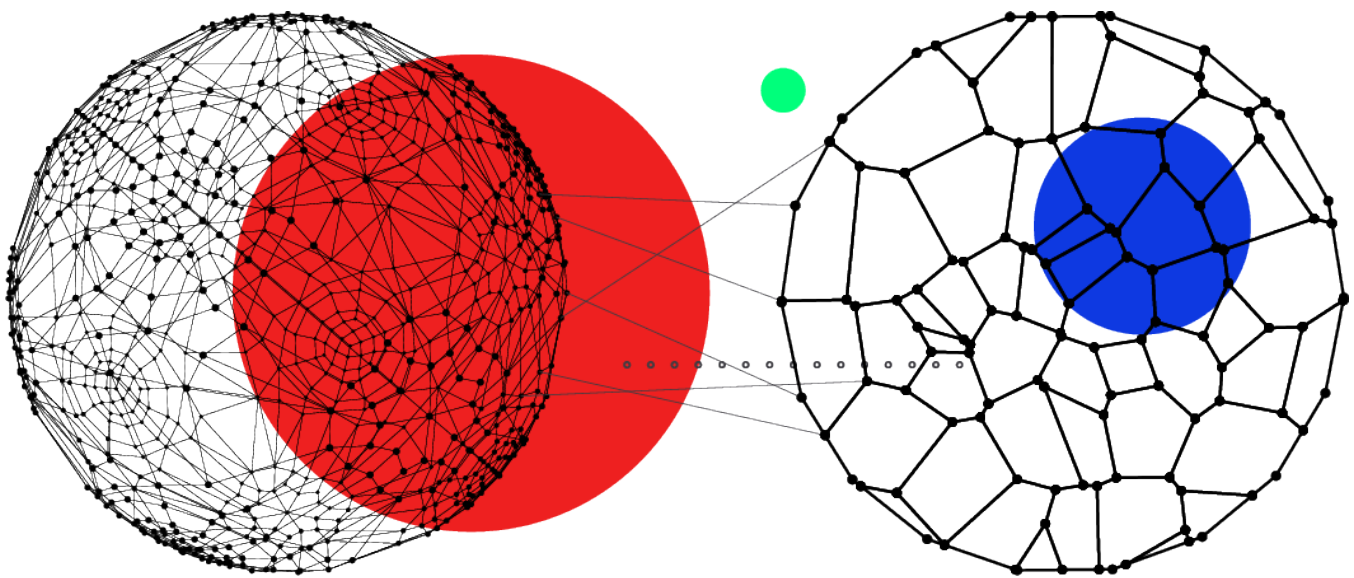
5. Now you can see the person's contact page which holds all of their information.

The screenshot shows the 'Contact John Smith' page in the ArtSmart Gallery interface. At the top, a green notification bar states 'Contact "John Smith" was created.' Below this, there are tabs for 'Partner/Vendor', 'Prospect', and 'Client'. The 'Details' tab is active, showing fields for Name (John Smith), Type, Company Name, Client Status, Birthdate, and Phone. There are also sections for 'Twitter' and 'Contact Information'. On the right side, there's a 'New Task' section with a 'Create a task...' input field and an 'Add' button. Below that, there's a 'Filters' section with options for 'All time', 'All activities', and 'All types'. At the bottom, there's a 'Upcoming & Overdue' section.

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.

This screenshot shows the same contact page for John Smith, but with the 'Custom Links' section expanded. It contains three links: 'Possible Art Objects to Offer per Movement' (highlighted with a red circle), 'Possible Art Objects to Offer per Artist', and 'Contact Address in Google Maps'. Below this, the 'System Information' section is visible, showing 'Created By' and 'Last Modified By' as 'Admin Artsmart' on 3/26/2020 at 10:34 AM. The 'Contact Owner' is also listed as 'Admin Artsmart'. The 'Professional Address' and 'Personal Address' fields are also visible at the top.

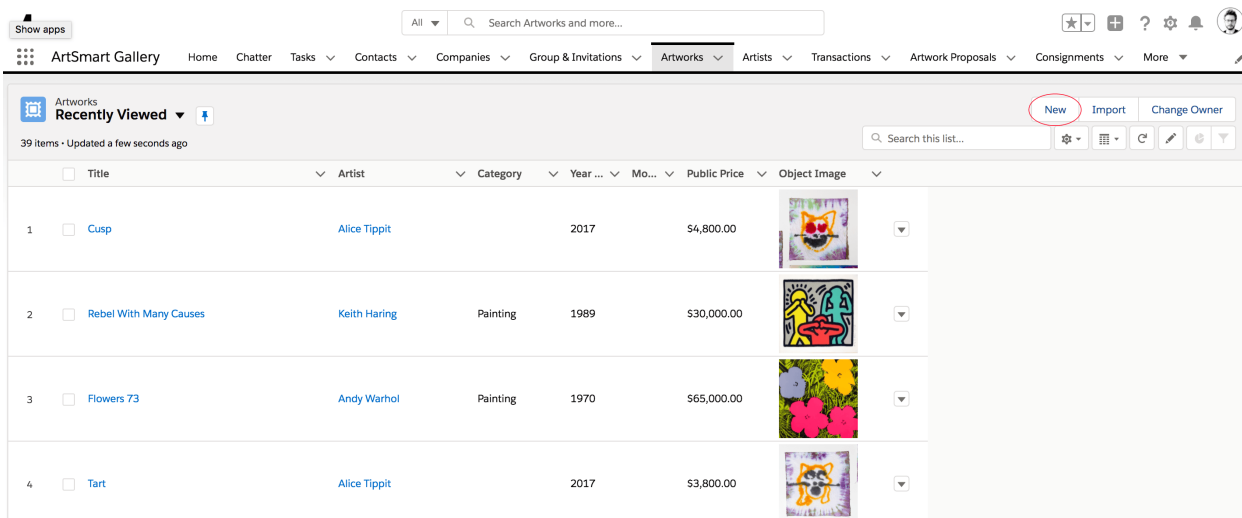
ADDING AN ARTWORK TO INVENTORY



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:

A screenshot of the 'New Artwork' form in the ArtSmart Gallery application. The form is titled 'New Artwork' and has a section labeled 'Information'. It contains several input fields and dropdown menus. The 'Title' field is empty. The 'Artist' field has a search bar with 'Search Artists...' and a magnifying glass icon. The 'Year of Work' field is empty. The 'Category' field is a dropdown menu with '--None--' selected. The 'Medium' field is empty. The 'Movement' section has two columns: 'Available' and 'Chosen'. The 'Available' column has two options: 'Abstract' and 'Constructivism'. The 'Chosen' column is empty. The 'Owner' field is set to 'Admin Artsmart'. The 'Public Price' field is set to '\$0.00'. The 'Acquisition/Consignment Amount' field is empty. The 'Artist Commission %' field is empty. The 'Acquisition/Consignment Date' field is empty. The 'Production Cost' field is set to '\$0.00'. At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

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.

The 'New Artwork' form is displayed with the 'Information' tab selected. The form contains the following fields and options:

- Title:** A text input field with the placeholder 'New Artwork'.
- Artist:** A dropdown menu with a search icon. The search results list includes Alice Tippet, Andy Warhol, Keith Haring, Veevart Artist, and Veevart Artist, each preceded by a star icon. A '+ New Artist' option is at the bottom.
- Owner:** A text input field with the value 'Admin Artsmart'.
- Public Price:** A text input field with the value '\$0.00'.
- Acquisition/Consignment Amount:** A text input field with a help icon.
- Artist Commission %:** A text input field.
- Acquisition/Consignment Date:** A date picker field with a calendar icon.
- Production Cost:** A text input field with the value '\$0.00'.
- Movement:** Two columns: 'Available' and 'Chosen'. Under 'Available' are 'Constructivism' and 'Contemporary Art'. Under 'Chosen' is 'Abstract'.

At the bottom of the form are three buttons: 'Cancel', 'Save & New', and 'Save'.

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.

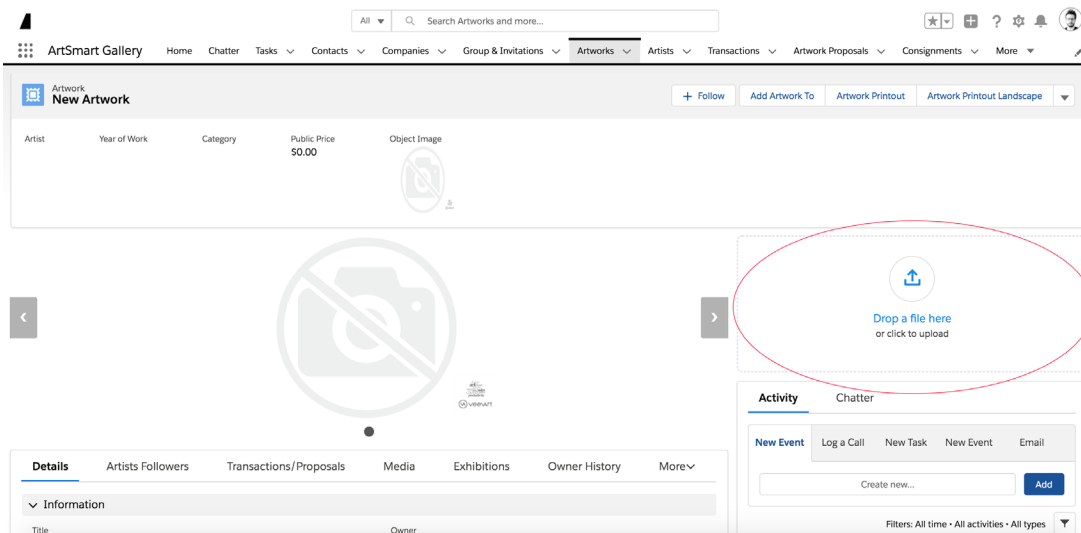
The 'New Artwork' form is displayed with the 'Information' tab selected. The form contains the following fields and options:

- Title:** A text input field with the placeholder 'New Artwork'.
- Artist:** A dropdown menu with a search icon. The search results list includes Alice Tippet, Andy Warhol, Keith Haring, Veevart Artist, and Veevart Artist, each preceded by a star icon. A '+ New Artist' option is at the bottom.
- Year of Work:** A text input field.
- Category:** A dropdown menu with the value '--None--'.
- Medium:** A text input field.
- Owner:** A text input field with the value 'Admin Artsmart'.
- Public Price:** A text input field with the value '\$0.00'.
- Acquisition/Consignment Amount:** A text input field with a help icon.
- Artist Commission %:** A text input field.
- Acquisition/Consignment Date:** A date picker field with a calendar icon.
- Production Cost:** A text input field with the value '\$0.00'.
- Movement:** Two columns: 'Available' and 'Chosen'. Under 'Available' are 'Constructivism' and 'Contemporary Art'. Under 'Chosen' is 'Abstract'.

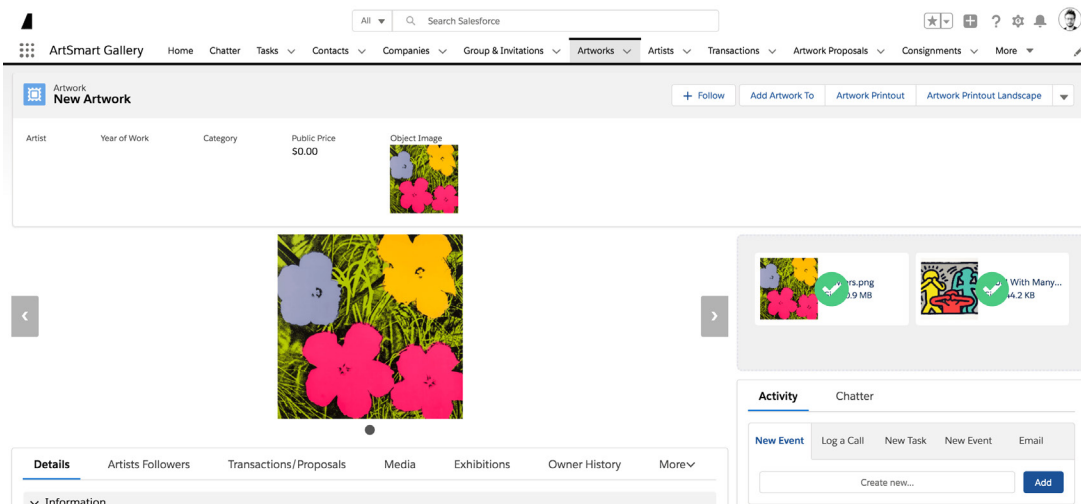
At the bottom of the form are three buttons: 'Cancel', 'Save & New', and 'Save'.

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.

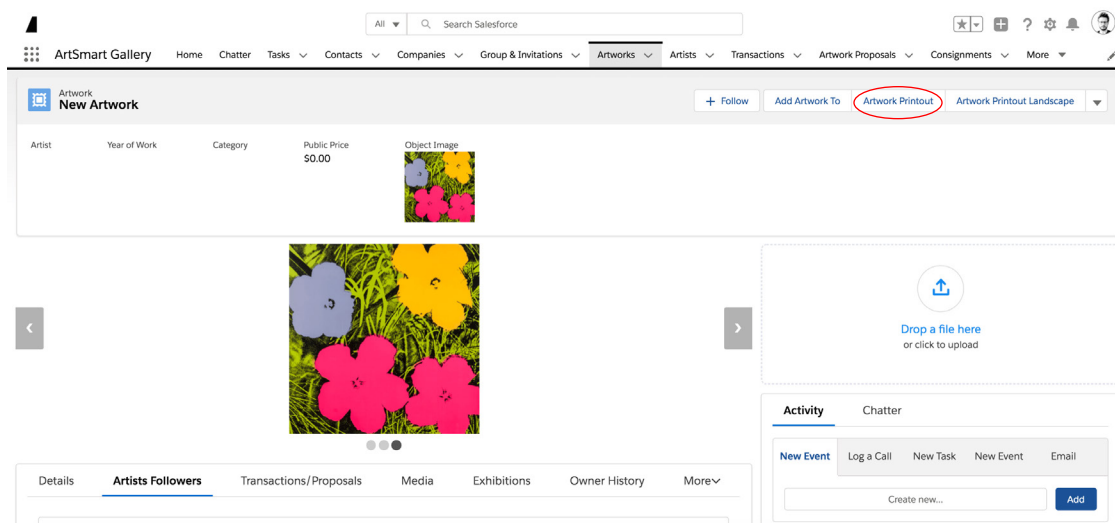


6. By default, the first file uploaded will be the primary one that is used in the automated documents.

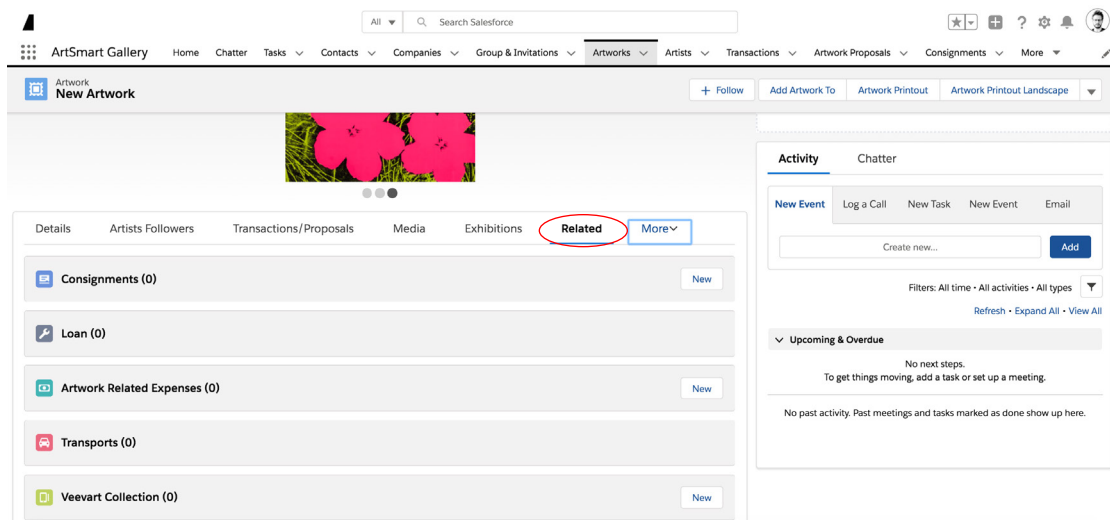


ADDING AN ARTWORK TO INVENTORY

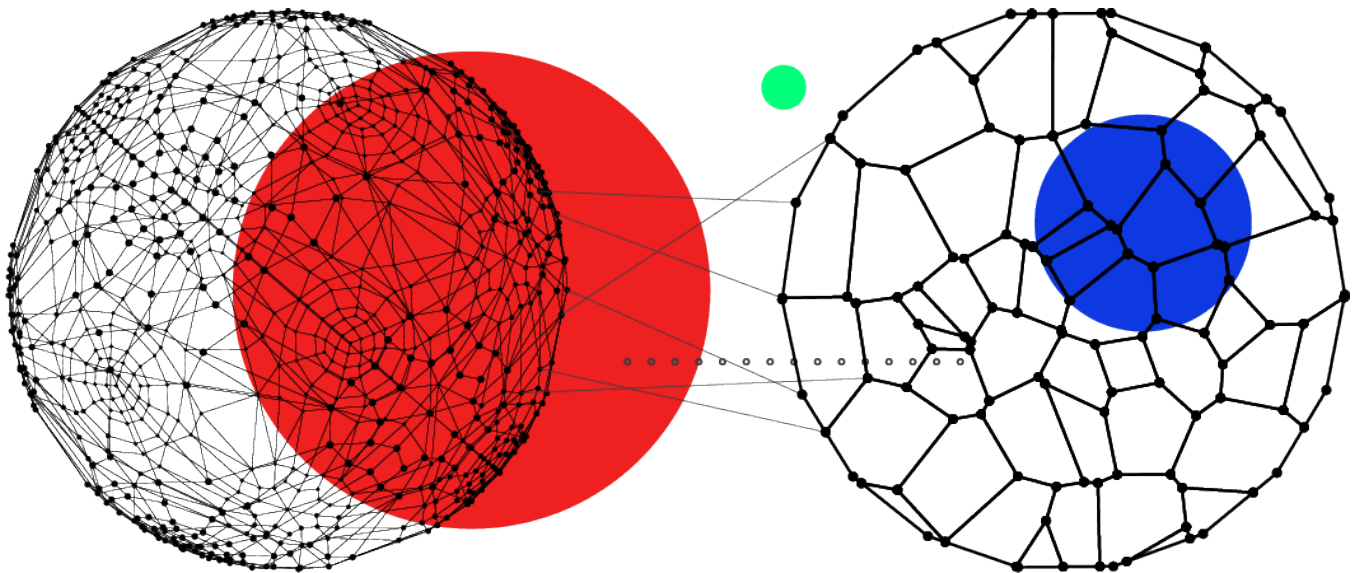
7. Use the PRINT OUT button to edit the artwork PDF.



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



GENERATING A LIST OF ARTWORKS

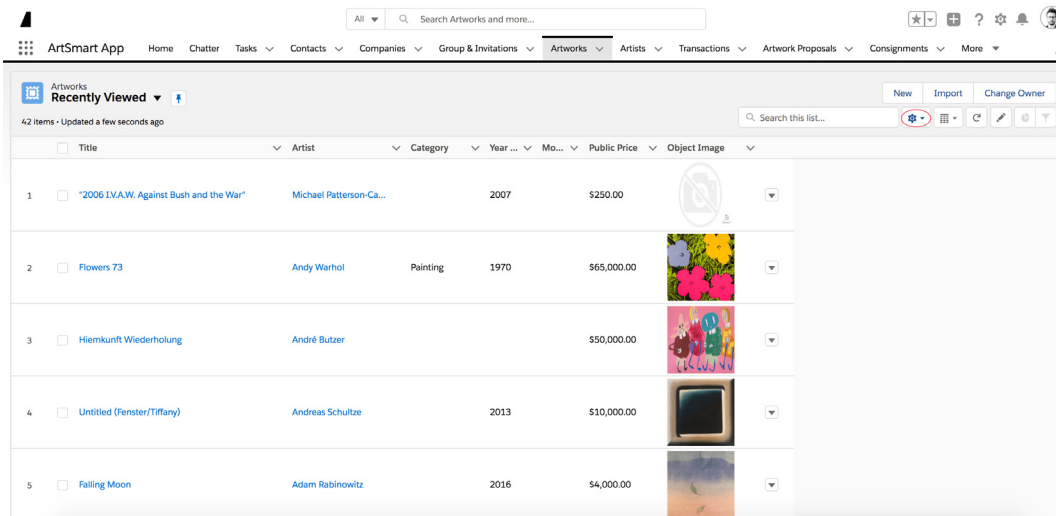


WITHIN THIS SECTION:
CREATING A LIST
MANAGING A LIST

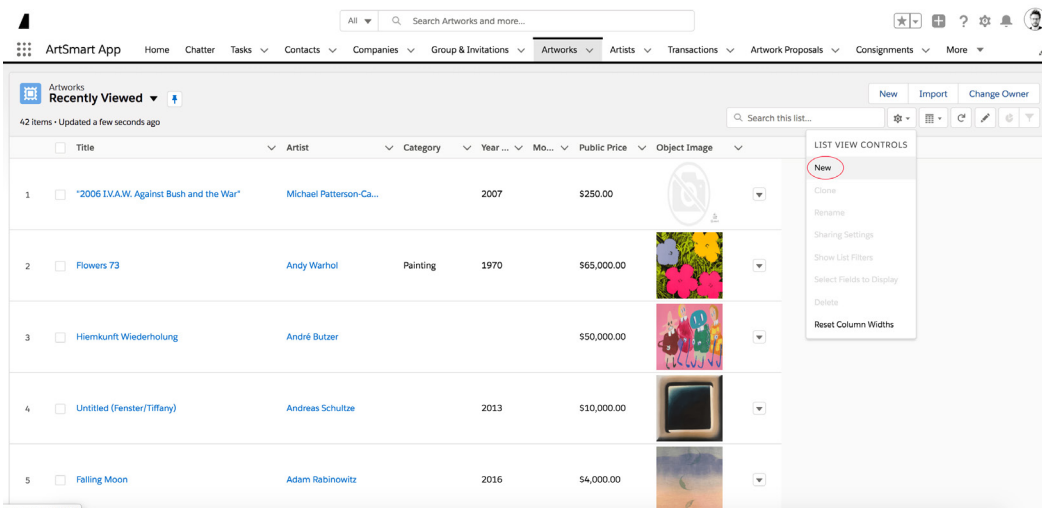
CREATING A LIST

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.



CREATING A LIST

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.

New List View

* List Name

Sculptures

* List API Name ⓘ

Sculptures

Who sees this list view?

☒ Only I can see this list view

☐ All users can see this list view ⓘ

☐ Share list view with groups of users ⓘ

Cancel

Save

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.

ArtSmart App

Home Chatter Tasks Contacts Companies Group & Invitations Artworks Artists Transactions Artwork Proposals Consignments More

Artworks Sculptures

50+ Items • Sorted by Title • Filtered by all artworks • Updated a few seconds ago

New Import Change Owner Printable View Add artworks to

Search this list...

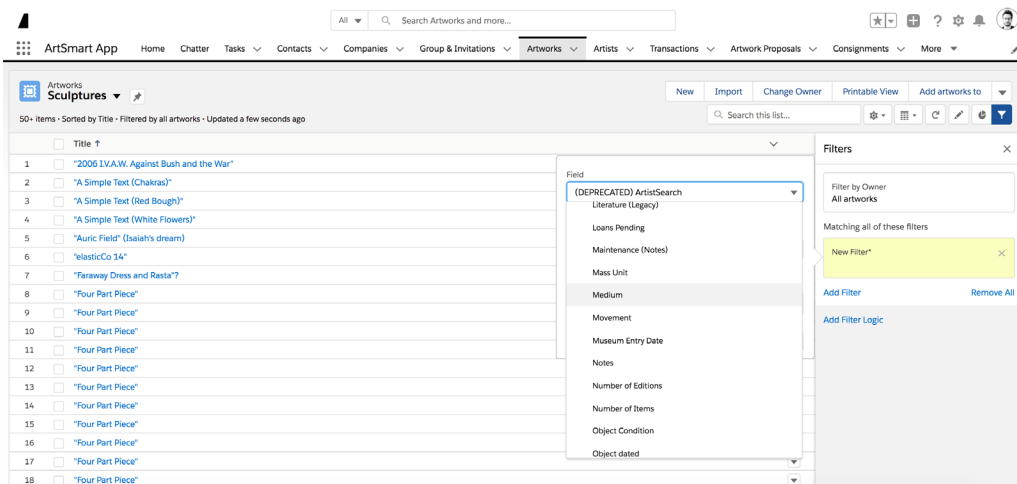
Filters

Filter by Owner
All artworks
Add Filter Remove All

<input type="checkbox"/>	Title ↑	
1	<input type="checkbox"/>	"2006 I.V.A.W. Against Bush and the War"
2	<input type="checkbox"/>	"A Simple Text (Chakras)"
3	<input type="checkbox"/>	"A Simple Text (Red Bough)"
4	<input type="checkbox"/>	"A Simple Text (White Flowers)"
5	<input type="checkbox"/>	"Auric Field" (Isaiah's dream)
6	<input type="checkbox"/>	"elasticCo 14"
7	<input type="checkbox"/>	"Faraway Dress and Rasta?"
8	<input type="checkbox"/>	"Four Part Piece"
9	<input type="checkbox"/>	"Four Part Piece"
10	<input type="checkbox"/>	"Four Part Piece"
11	<input type="checkbox"/>	"Four Part Piece"
12	<input type="checkbox"/>	"Four Part Piece"
13	<input type="checkbox"/>	"Four Part Piece"
14	<input type="checkbox"/>	"Four Part Piece"
15	<input type="checkbox"/>	"Four Part Piece"
16	<input type="checkbox"/>	"Four Part Piece"
17	<input type="checkbox"/>	"Four Part Piece"
18	<input type="checkbox"/>	"Four Part Piece"

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.



Field

Medium

Operator

contains

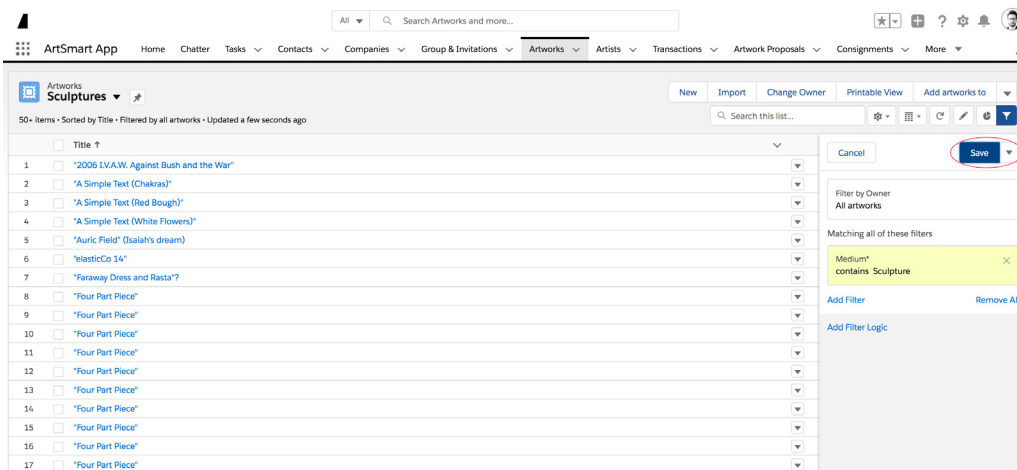
Value

Sculpture

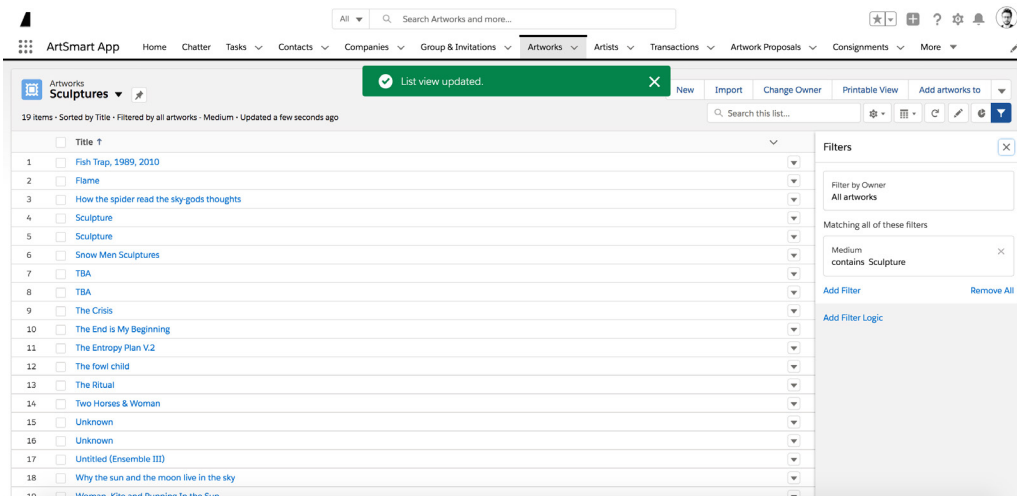
Done

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.

ArtSmart Gallery

Home

Chatter

Tasks

Contacts

Companies

Group & Invitations

Artworks

Artists

Transactions

Artwork Proposals

All

Search Artworks and more...

Artworks

Recently Viewed

39 item

Q

RECENT LIST VIEWS

1

All

2

Artworks w/o Images

3

Cosmic Studios

4

Kaari Upson - Trashole Inc

5

Kravis Collection

6

Lita Albuquerque Studio

7

MDJ Studio LLC

8

Mindy Shapero Studio

9

Recently Viewed (Pinned list)

10

Zoe Crosher

11

ALL OTHER LISTS

Year ...


Mo...

Public Price

Object Image


1970

\$65,000.00




1989

\$30,000.00




2017

\$3,800.00



2017

\$4,800.00



photo

5

☐ "Four Part Piece"

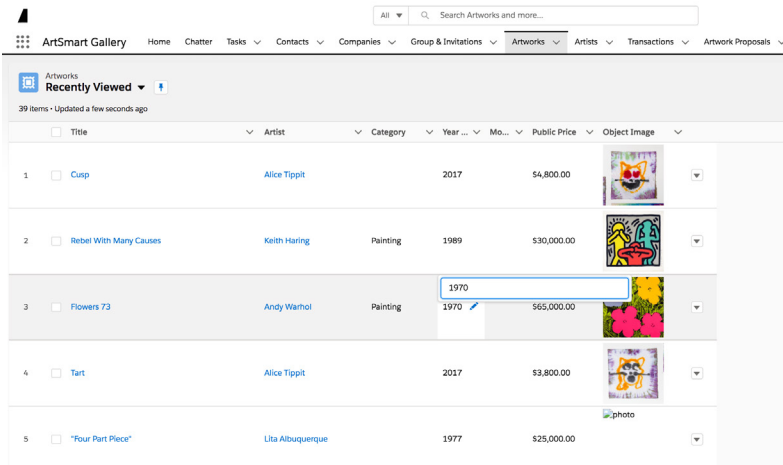
Lita Albuquerque

1977

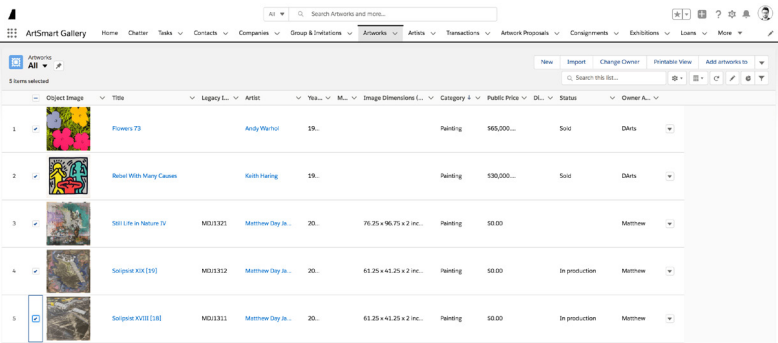
\$25,000.00

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.



All
Displaying records 1 - 25, more records available

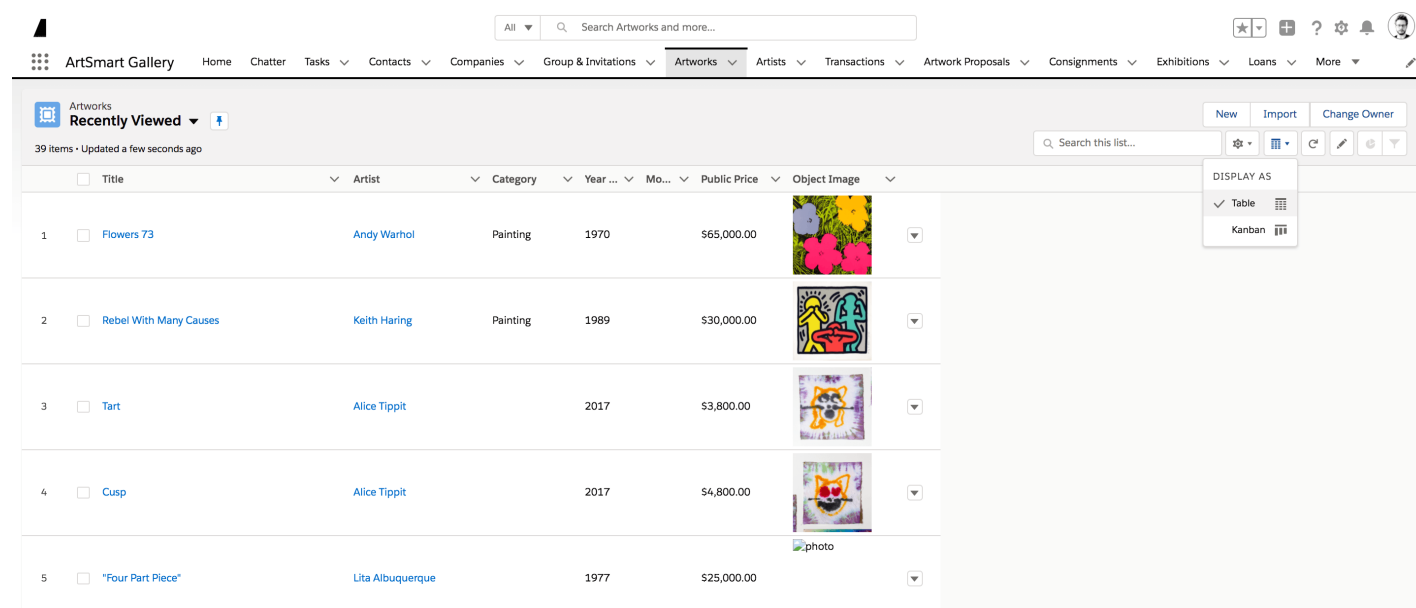
Number of records 25

Object Image	Title	Legacy Inventory Number	Artist	Year of Work	Movement	Image Dimensions (Legacy)	Category	Public Price	Display/Storage Location	Status	Owner Alias
	Still Life in Nature IV	MDJ1321	Matthew Day Jackson	2020		75.25 x 96.75 x 2 inches	Painting	\$0.00		In production	Matthew
	Solipais XIX (18)	MDJ1312	Matthew Day Jackson	2020		61.25 x 41.25 x 2 inches	Painting	\$0.00		In production	Matthew
	Solipais XVIII (18)	MDJ1311	Matthew Day Jackson	2020		61.25 x 41.25 x 2 inches	Painting	\$0.00		In production	Matthew
	Rebel With Many Causes		Keith Haring	1989			Painting	\$30,000.00		Sold	DActs
	Flowers 73		Andy Warhol	1970			Painting	\$65,000.00		Sold	DActs






MANAGING A LIST

Views can be seen under 2 formats:

1. Grid
2. Kanban



The screenshot displays the ArtSmart Gallery application interface. At the top, there is a navigation bar with the following items: ArtSmart Gallery, Home, Chatter, Tasks, Contacts, Companies, Group & Invitations, Artworks (selected), Artists, Transactions, Artwork Proposals, Consignments, Exhibitions, Loans, and More. A search bar is located next to the navigation bar. Below the navigation bar, the main content area shows a list of artworks under the 'Recently Viewed' tab. The list contains 39 items, updated a few seconds ago. The list is displayed in a grid view, with columns for Title, Artist, Category, Year, Mo., Public Price, and Object Image. The first five items are:

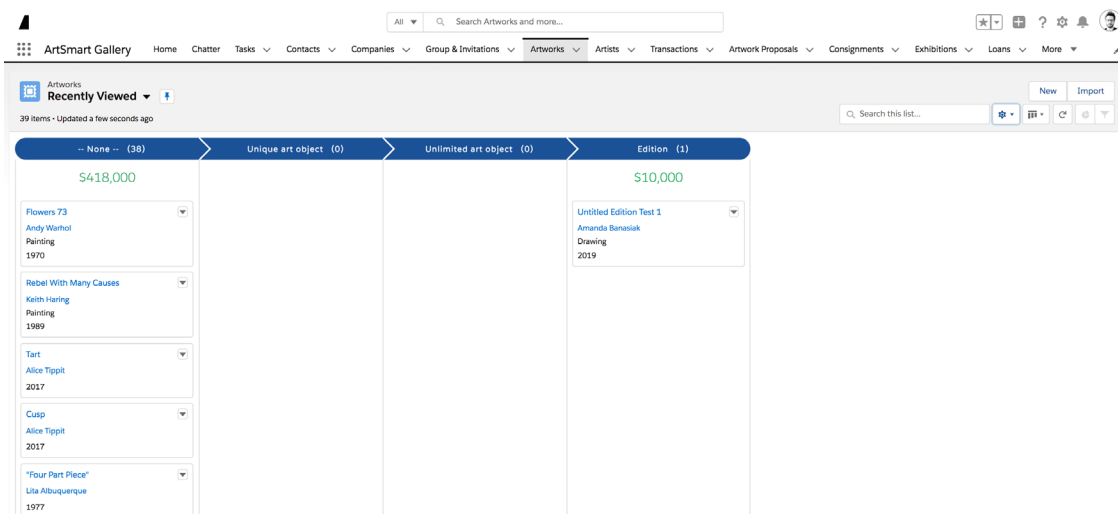
	Title	Artist	Category	Year	Mo.	Public Price	Object Image
1	Flowers 73	Andy Warhol	Painting	1970		\$65,000.00	
2	Rebel With Many Causes	Keith Haring	Painting	1989		\$30,000.00	
3	Tart	Alice Tippit		2017		\$3,800.00	
4	Cusp	Alice Tippit		2017		\$4,800.00	
5	"Four Part Piece"	Lita Albuquerque		1977		\$25,000.00	

A dropdown menu is open on the right side of the list, showing options to 'DISPLAY AS' Table or Kanban. The 'Table' option is selected.

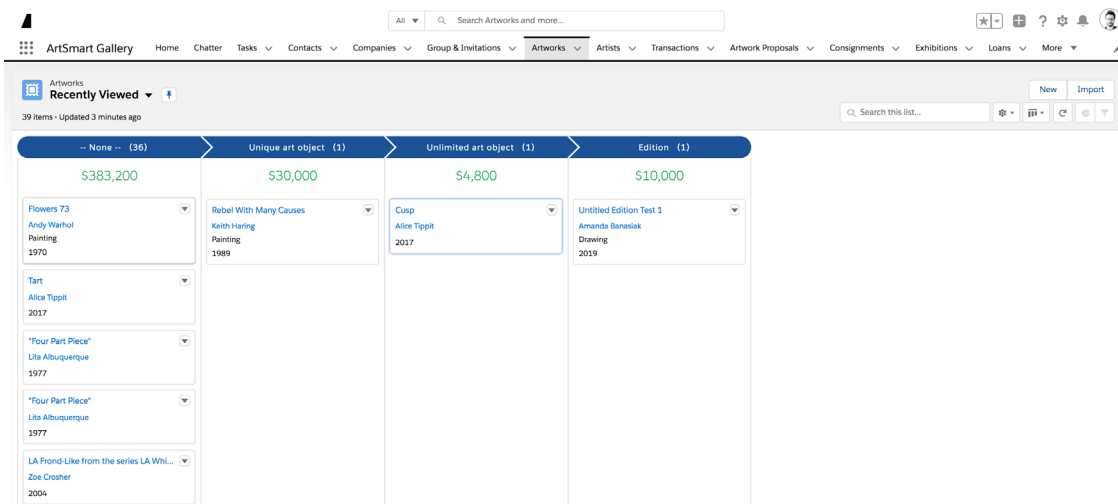
You can switch from one to the other using the display icon on the top right hand menu.

MANAGING A LIST

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

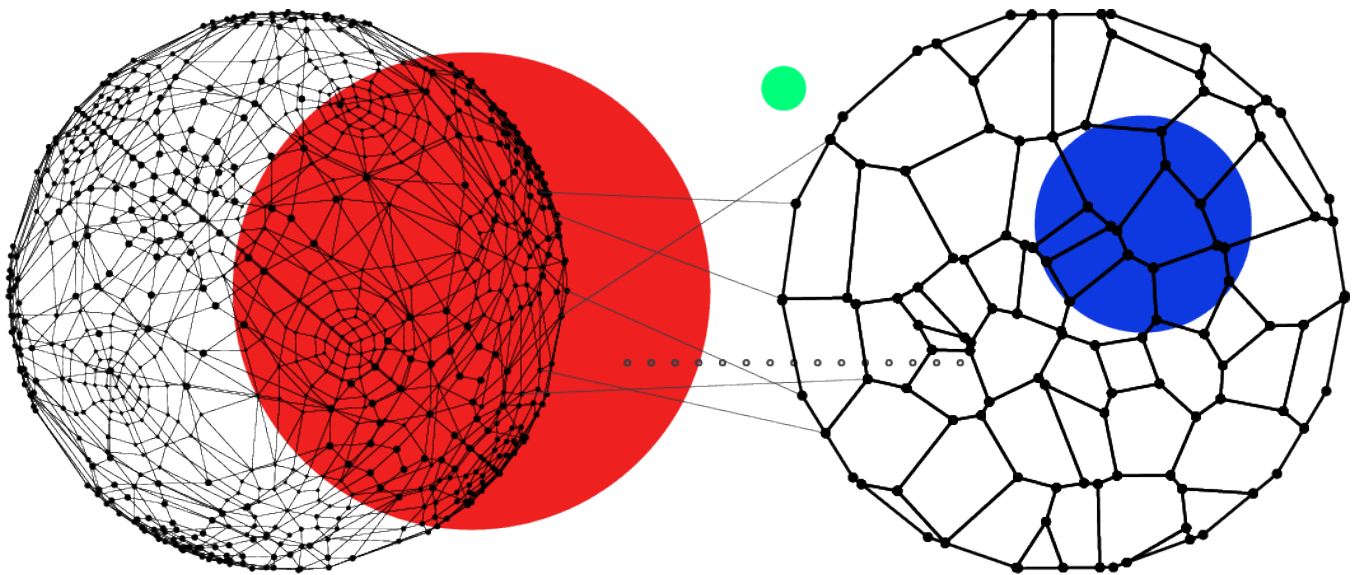


In this example, you can see the artworks based by their commercial status (consigned for sale, borrowed, owned by you), but you can also group artworks by medium types, locations, etc. and you can easily drag and drop the artwork from one category to another in this view if it needs to be moved.



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



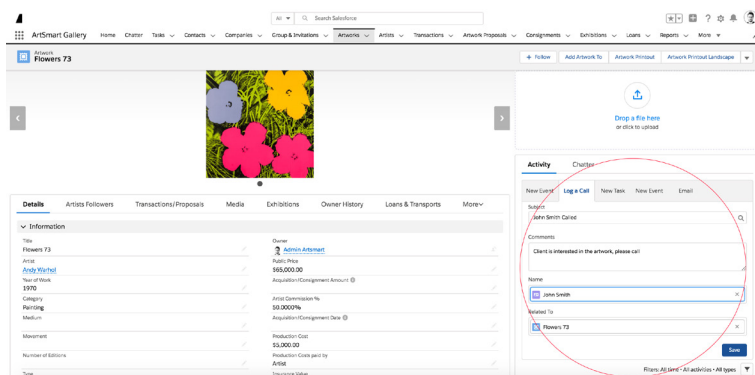
WITHIN THIS SECTION:

MANAGING INTERACTIONS WITH COLLECTORS/ GALLERIES / INSTITUTIONS

RECORD A TO-DO OR FUTURE ACTION

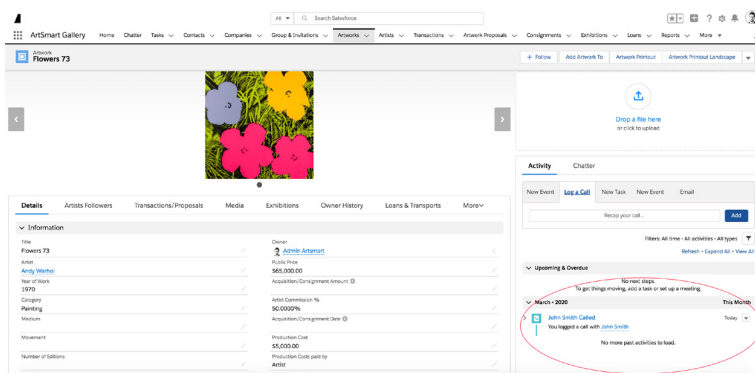
MANAGING INTERACTIONS WITH COLLECTORS / GALLERIES / INSTITUTIONS

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.



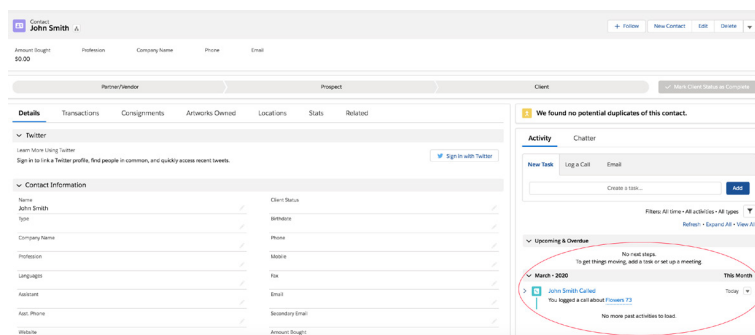
The screenshot shows the ArtSmart Gallery interface. The top navigation bar includes links like Home, Charter, Tools, Contacts, Companies, Group & Institutions, Artworks, Artists, Transactions, Artwork Proposals, Commissions, Exhibitions, Loans, Reports, and More. The main content area displays the 'Flowers 73' artwork, including its image and details. The 'Activity' tab is selected, and the 'Log a Call' button is highlighted with a red circle. The 'Log a Call' form is open, showing fields for Name (John Smith), Related To (Flowers 73), and a description field.

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



The screenshot shows the ArtSmart Gallery interface. The top navigation bar includes links like Home, Charter, Tools, Contacts, Companies, Group & Institutions, Artworks, Artists, Transactions, Artwork Proposals, Commissions, Exhibitions, Loans, Reports, and More. The main content area displays the 'Flowers 73' artwork, including its image and details. The 'Activity' tab is selected, and the 'Log a Call' button is highlighted with a red circle. The 'Log a Call' form is open, showing fields for Name (John Smith), Related To (Flowers 73), and a description field.

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



The screenshot shows the ArtSmart Gallery interface. The top navigation bar includes links like Home, Charter, Tools, Contacts, Companies, Group & Institutions, Artworks, Artists, Transactions, Artwork Proposals, Commissions, Exhibitions, Loans, Reports, and More. The main content area displays the 'John Smith' contact, including their profile picture and details. The 'Activity' tab is selected, and the 'Log a Call' button is highlighted with a red circle. The 'Log a Call' form is open, showing fields for Name (John Smith), Related To (Flowers 73), and a description field.

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.

The screenshot shows the ArtSmart Gallery interface. The top navigation bar includes 'ArtSmart Gallery', 'Home', 'Chatter', 'Tasks', 'Contacts', 'Companies', 'Group & Invitations', 'Artworks', 'Artists', 'Transactions', 'Artwork Proposals', 'Consignments', 'Exhibitions', 'Loans', 'Reports', and 'More'. The main content area displays the artwork 'Flowers 73' by Andy Warhol, created in 1970, categorized as a Painting, with a public price of \$65,000.00. The artwork image is a vibrant floral print. On the right-hand side, there is a 'NEW TASK' button circled in red, along with other options like 'New Event', 'Log a Call', 'New Event', and 'Email'. Below the artwork image, there is a 'Details' tab with various information fields.

Details	Artists Followers	Transactions/Proposals	Media	Exhibitions	Owner History	Loans & Transports	More
Information							
Title	Flowers 73						
Artist	Andy Warhol						
Year of Work	1970						
Category	Painting						
Medium	Medium						
Movement	Production Cost						
Number of Editions	Production Costs paid by						
Type	Insurance Value						
Display/Storage Location	Contact Owner						

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.

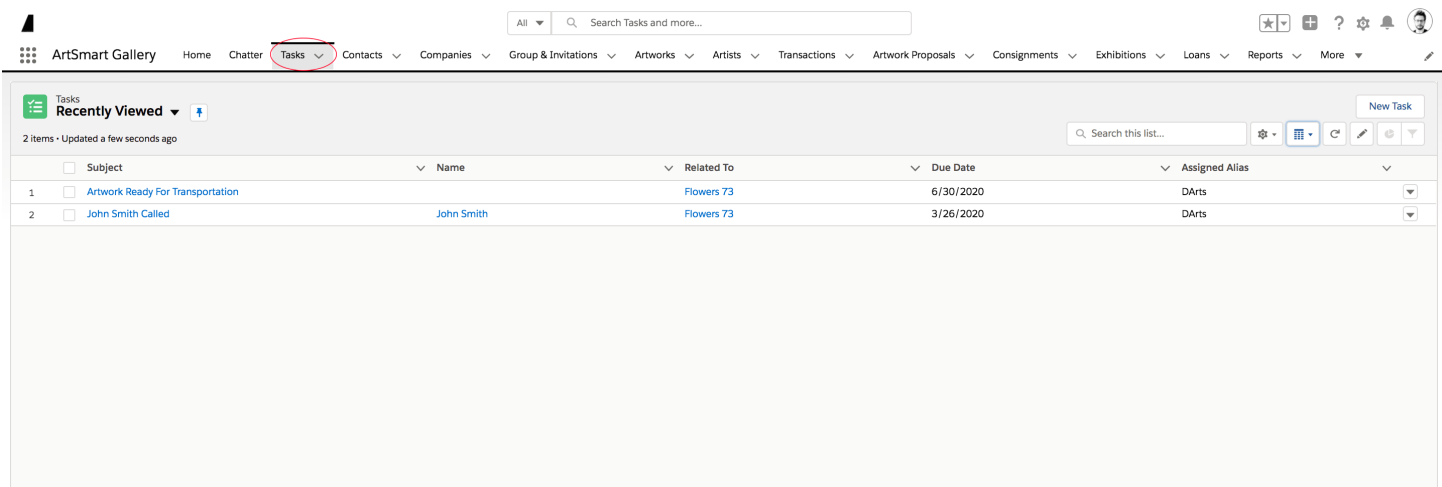
The screenshot shows the ArtSmart Gallery interface with the 'Flowers 73' artwork page. The 'NEW TASK' button in the right-hand menu is circled in red. The task details form is filled out with the following information:

- Subject: Artwork Ready For Transportation
- Due Date: 6/30/2024
- Name: Search Contacts...
- Related To: Flowers 73
- Assigned To: Admin ArtSmart
- Status: Not Started

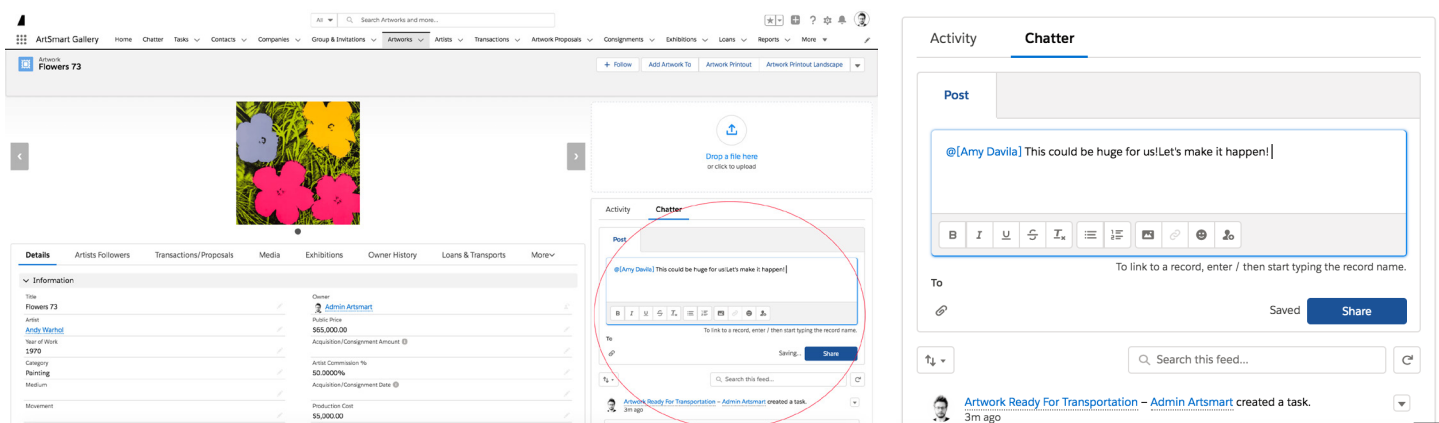
The 'Save' button is visible at the bottom right of the task form.

RECORD A TO-DO OR FUTURE ACTION

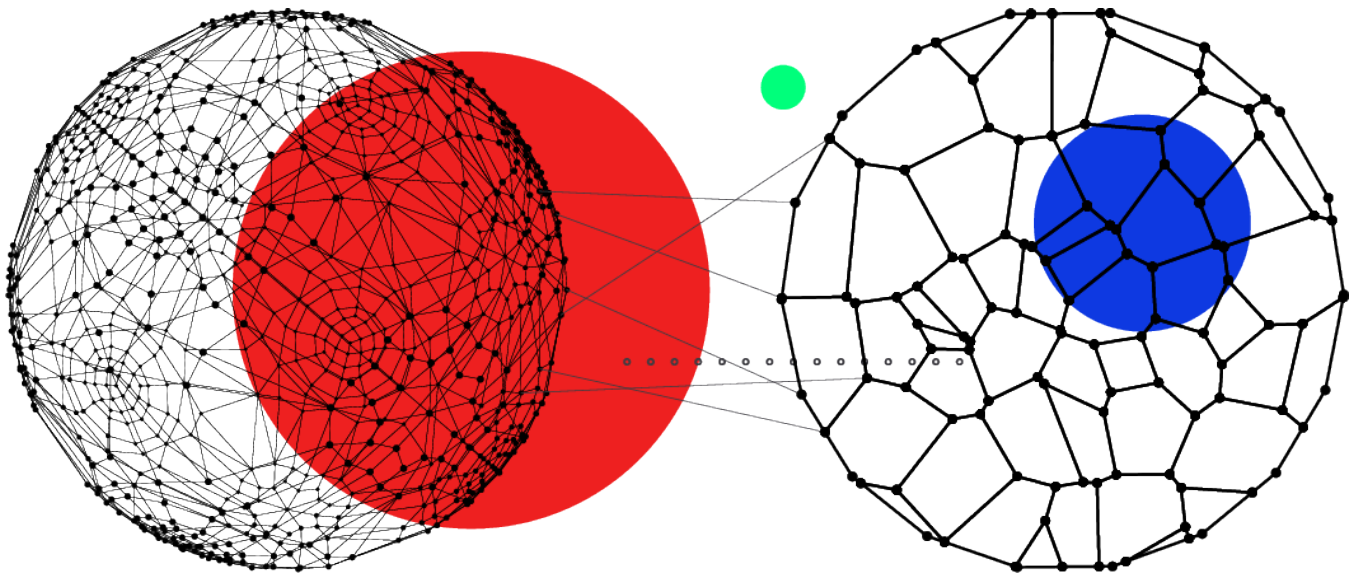
3. You can see a list of all your tasks by clicking TASKS button in your top menu.



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

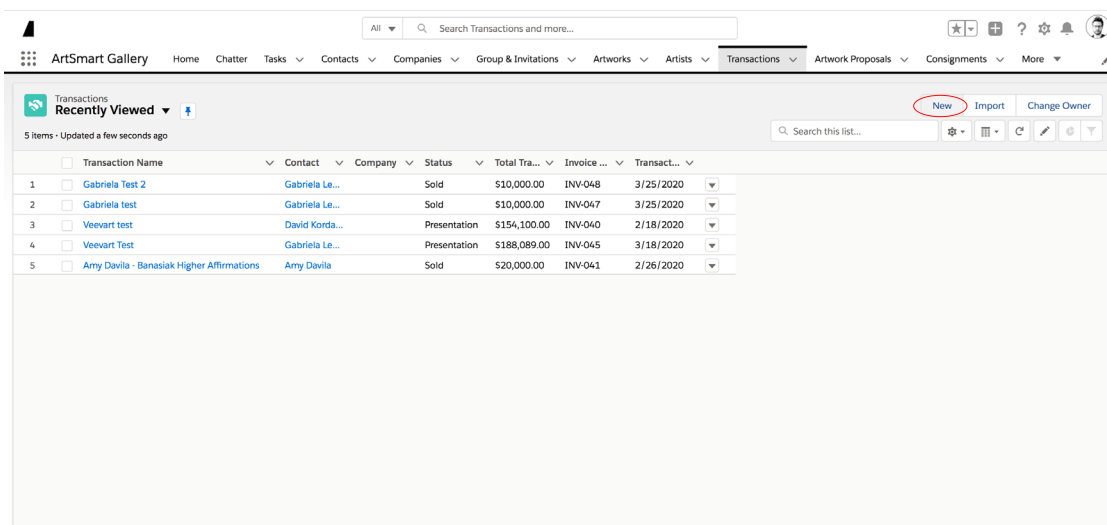
MARKED AS SOLD

PAYMENTS

ELECTRONIC INVOICES

CREATE A TRANSACTION:

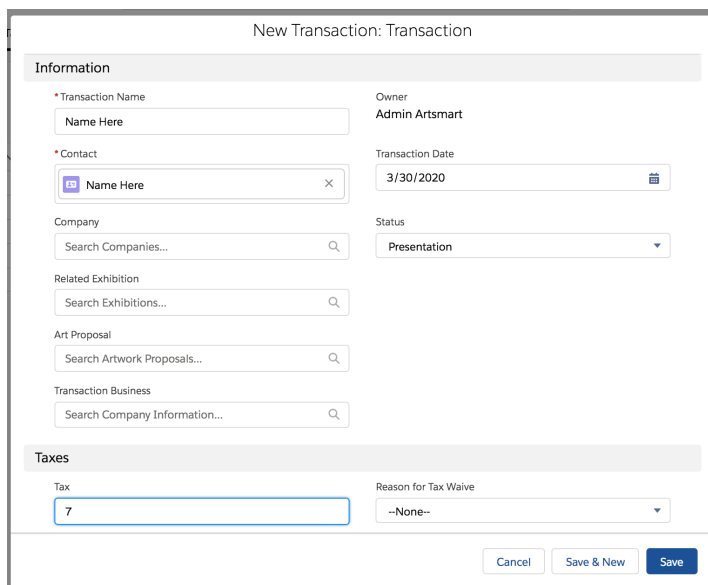
1. Click NEW under the Transactions tab.



The screenshot shows the ArtSmart Gallery interface. The 'Transactions' tab is selected in the top navigation bar. Below the navigation bar, there is a search bar and a list of transactions. The 'New' button is highlighted with a red circle. The table below shows a list of transactions with columns for Transaction Name, Contact, Company, Status, Total Tra..., Invoice..., and Transact....

	Transaction Name	Contact	Company	Status	Total Tra...	Invoice ...	Transact...
1	Gabriela Test 2	Gabriela Le...		Sold	\$10,000.00	INV-048	3/25/2020
2	Gabriela test	Gabriela Le...		Sold	\$10,000.00	INV-047	3/25/2020
3	Veevart test	David Korda...		Presentation	\$154,100.00	INV-040	2/18/2020
4	Veevart Test	Gabriela Le...		Presentation	\$188,089.00	INV-045	3/18/2020
5	Amy Davila - Banasiak Higher Affirmations	Amy Davila		Sold	\$20,000.00	INV-041	2/26/2020

2. Fill in the desired fields:



The screenshot shows the 'New Transaction: Transaction' form. The form is divided into two main sections: 'Information' and 'Taxes'. The 'Information' section contains fields for Transaction Name, Contact, Company, Status, Transaction Date, Related Exhibition, Art Proposal, and Transaction Business. The 'Taxes' section contains fields for Tax and Reason for Tax Waive. The form is currently empty, with placeholder text like 'Name Here' and 'Search Companies...'. The 'Status' dropdown is set to 'Presentation'. The 'Transaction Date' is set to '3/30/2020'. The 'Tax' dropdown is set to '7'. The 'Reason for Tax Waive' dropdown is set to '--None--'. The form has 'Cancel', 'Save & New', and 'Save' buttons at the bottom.

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.

The screenshot shows the 'Transaction' page in the ArtSmart Gallery interface. The page has a navigation bar at the top with links like Home, Chatter, Tasks, Contacts, Companies, Group & Invitations, Artworks, Artists, Transactions, Artwork Proposals, Consignments, and More. The 'Transaction' section is active, showing a 'Name Here' transaction. Below this, there are sections for 'Invoice Settings' and 'Invoice Notes'. The 'Invoice Settings' section includes checkboxes for 'Display Discount Per Artwork', 'Display Banking Information', 'Display image on the invoices', 'Display Amount Paid and Amount Due', and 'Display Payment History'. The 'Invoice Notes' section contains a 'Bottom Paragraph' with a default disclaimer text, which is circled in red. The disclaimer text is: 'Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem. Nulla consequat massa quis enim. Donec pede justo, fringilla vel, aliquet nec, vulputate eget, arcu. In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Nullam dictum felis eu pede mollis pretium. Integer tincidunt. Cras dapibus. Vivamus elementum semper nisi. Aenean vulputate eleifend tellus. Aenean leo ligula porttitor eu, consequat vitae, eleifend ac, enim. Aliquam lorem ante, dapibus in, viverra quis, feugiat a, tellus. Phasellus viverra nulla ut metus varius laoreet. Quisque rutrum. Aenean imperdiet. Etiam ultricies nisi vel augue. Curabitur ullamcorper ultricies nisi. Nam eget dui. Etiam rhoncus. Maecenas tempus, tellus eget condimentum rhoncus, sem quam semper libero, sit amet adipiscing sem neque sed ipsum. N'.

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.

The screenshot shows the 'Transaction' page in the ArtSmart Gallery interface, displaying the transaction status phases. The page has a navigation bar at the top with links like Home, Chatter, Tasks, Contacts, Companies, Group & Invitations, Artworks, Artists, Transactions, Artwork Proposals, Consignments, and More. The 'Transaction' section is active, showing a 'Name Here' transaction. Below this, there are sections for 'Transaction Summary' and 'Transaction Phases'. The 'Transaction Summary' section includes fields for 'Contact', 'Company', 'Total Transaction Amount', 'Total Amount Due', and 'Transaction Date'. The 'Transaction Phases' section shows a progress bar with four phases: 'Presentation', 'Negotiation', 'Sold', and 'Not Sold'. The 'Presentation' phase is currently active. A 'Mark Status as Complete' button is circled in red. Below the phases, there are sections for 'Details' and 'Activity'. The 'Details' section includes a table with columns for 'Transaction Name', 'Contact', 'Company', 'Related Exhibition', 'Art Proposal', 'Invoice Number', and 'Last Activity Date'. The 'Activity' section includes a 'Log a Call' button, a 'New Task' button, and a 'Recap your call...' button. The 'Activity' section also shows a list of 'Upcoming & Overdue' activities.

ADD ARTWORKS TO A TRANSACTION:

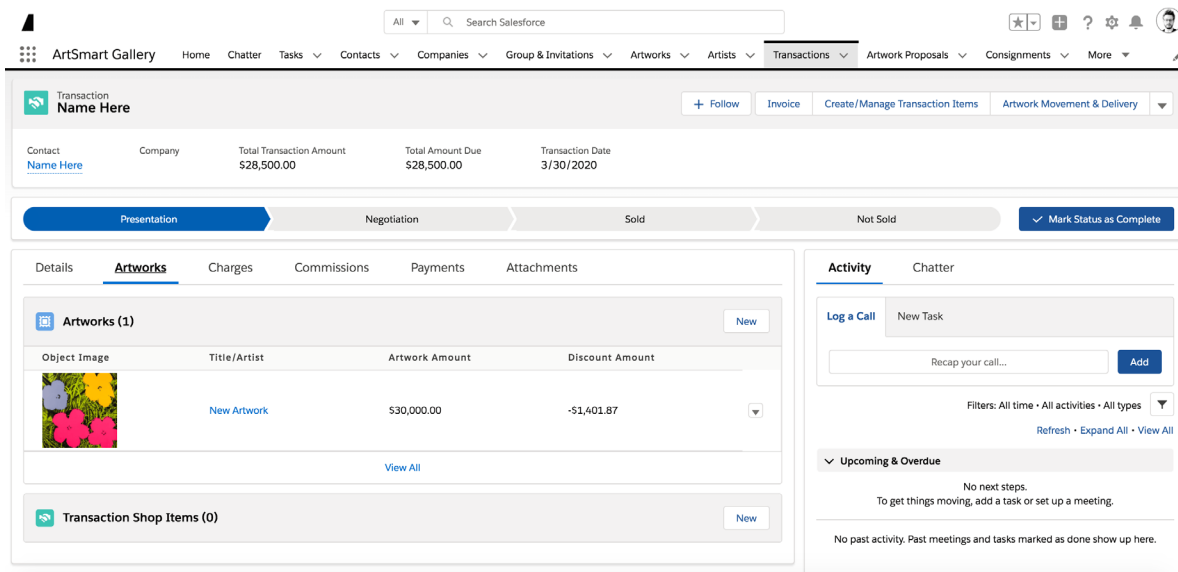
1. To add artworks, you must click the tab “Artworks” underneath the status bar. Click NEW to add artworks.

The screenshot shows the ArtSmart Gallery interface. At the top, there's a navigation bar with tabs like Home, Chatter, Tasks, Contacts, Companies, Group & Invitations, Artworks, Artists, Transactions, Artwork Proposals, Consignments, and More. The 'Transactions' tab is active. Below the navigation bar, there's a search bar and a status bar with tabs: Presentation, Negotiation, Sold, and Not Sold. The 'Presentation' tab is selected. Underneath, there's a section for 'Transaction Name Here' with fields for Contact, Company, Total Transaction Amount (\$0.00), Total Amount Due (\$0.00), and Transaction Date (3/30/2020). Below this, there's a section for 'Artworks' with a 'New' button. To the right, there's an 'Activity' section with a 'Log a Call' button and a 'New Task' button. Below the 'Artworks' section, there's a 'Transaction Shop Items (0)' section with a 'New' button.

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.

The first screenshot shows the 'New Transaction Item' form. The 'Information' section has fields for Transaction, Transaction Item ID, Artwork, Artwork Amount, Artwork Production Costs, Artist, and Artist Production Costs. The 'Discount' section has a dropdown for Type of Discount (None, Value, Percentage) and a field for Discount. The 'Related Commission' section has a search bar for Search Artist Commissions... The second screenshot shows the same form with the 'New Artwork' button selected in the Artwork dropdown, and the 'Artist Unknown' button selected in the Artist dropdown. The Artwork Amount is set to \$30,000.00 and the Artist Production Costs are set to \$0.00. The 'Discount' section is also visible.

ADD ARTWORKS TO A TRANSACTION:



Transaction Name Here


+ Follow Invoice Create/Manage Transaction Items Artwork Movement & Delivery

Contact	Company	Total Transaction Amount	Total Amount Due	Transaction Date
Name Here		\$28,500.00	\$28,500.00	3/30/2020

Presentation Negotiation Sold Not Sold Mark Status as Complete

Details Artworks Charges Commissions Payments Attachments

Artworks (1) New

Object Image	Title/Artist	Artwork Amount	Discount Amount
	New Artwork	\$30,000.00	-\$1,401.87

View All

Transaction Shop Items (0) New

Activity Chatter

Log a Call New Task

Recap your call... Add

Filters: All time • All activities • All types

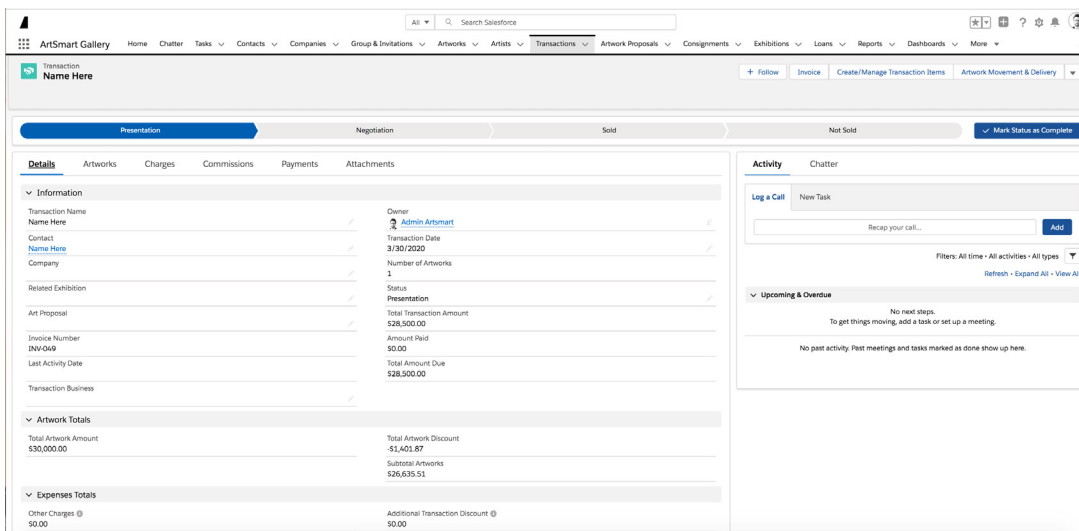
Refresh • Expand All • View All

Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

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.



Transaction Name Here

+ Follow Invoice Create/Manage Transaction Items Artwork Movement & Delivery

Presentation Negotiation Sold Not Sold Mark Status as Complete

Details Artworks Charges Commissions Payments Attachments

Information

Transaction Name	Name Here	Owner	Admin ArtSmart
Contact	Name Here	Transaction Date	3/30/2020
Company		Number of Artworks	1
Related Exhibition		Status	Presentation
Art Proposal		Total Transaction Amount	\$28,500.00
Invoice Number	INV-049	Amount Paid	\$0.00
Last Activity Date		Total Amount Due	\$28,500.00
Transaction Business			

Artwork Totals

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

Expenses Totals

Other Charges @	\$0.00	Additional Transaction Discount @	\$0.00
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Activity Chatter

Log a Call New Task

Recap your call... Add

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

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.

The screenshot shows the ArtSmart App interface. At the top, there's a navigation bar with tabs like Home, Chatter, Tasks, Contacts, Companies, Group & Invitations, Artworks, Artists, Transactions, Artwork Proposals, Consignments, and More. The 'Transactions' tab is selected. Below the navigation bar, there's a section for 'Transaction Name Here' with buttons for '+ Follow', 'Invoice', 'Create/Manage Transaction Items', and 'Artwork Movement & Delivery'. A status bar shows 'Sold' and 'Not Sold' options. The 'Payments' tab is selected, showing a table of 'Transaction Payments (2)'. The table has columns for Transaction Payment, Payment Amount, Payment Date, and Status. The first row is 'TP-060' with a payment amount of \$28,500.00 and a status of 'Unpaid'. The second row is 'TP-061' with a payment amount of \$30,000.00 and a status of 'Paid'. A red circle highlights the 'Edit' button next to the 'Unpaid' status of TP-060. There are also buttons for 'View All' and 'New'.

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

This screenshot is similar to the previous one, but it shows the 'Edit' button highlighted with a red circle. The 'Edit' button is located next to the 'Unpaid' status of the 'TP-060' transaction. The interface is the same as the previous screenshot, showing the ArtSmart App navigation bar, the 'Transactions' tab, and the 'Payments' sub-tab.

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

The screenshot shows the 'Edit TP-060' form. At the top, it says 'Edit TP-060'. Below that, there's a section for 'Information'. The 'Transaction' section has a 'Name Here' field. The 'Transaction Payment' section has a 'TP-060' field. The 'Payment Amount' field is set to '28,500.00'. The 'Payment Method' is set to '--None--'. The 'Status' is set to 'Unpaid'. The 'Payment Date' is set to '3/30/2020'. There's a 'Notes' section with a text area and a 'Salesforce Sans' dropdown. At the bottom, there are buttons for 'Cancel', 'Save & New', and 'Save'.

MODIFY PAYMENTS:

1. Create a new payment plan by clicking NEW.

The screenshot shows the ArtSmart Gallery interface. At the top, there's a navigation bar with 'ArtSmart Gallery' and various menu items like Home, Chatter, Tasks, etc. Below this, a transaction is selected, showing tabs for Details, Artworks, Charges, Commissions, Payments, and Attachments. The 'Payments' tab is active, displaying a table of 'Transaction Payments (1)'. The table has columns for Transaction Payment, Payment Amount, Payment Date, and Status. One payment is listed: TP-060, \$18,500.01, 3/30/2020, Unpaid. A 'New' button is visible next to the table header. Below the table, there's a section for 'Transaction Returns/Refunds (0)' with another 'New' button. On the right, there's an 'Activity' section with 'Log a Call' and 'New Task' buttons, and a 'Recap your call...' button. At the bottom, there's a 'Mark Status as Complete' button.

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

New Transaction Payment

The screenshot shows the 'New Transaction Payment' form. It has a header 'Information' and a sub-header 'Transaction Payment'. The form includes a 'Transaction' dropdown menu with 'Name Here' selected. Below this, there's a 'Payment Amount' field with '\$10,000.00' entered. The 'Payment Method' dropdown is set to '--None--'. There's a 'Notes' section with a text area and a 'Salesforce Sans' font dropdown. To the right, there's a calendar widget for April 2020, with the 10th selected. At the bottom, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

MANAGE EXPENSES AND CHARGES:

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

The screenshot shows the Salesforce ArtSmart Gallery interface. The top navigation bar includes 'Home', 'Chatter', 'Tasks', 'Contacts', 'Companies', 'Group & Invitations', 'Artworks', 'Artists', 'Transactions', 'Artwork Proposals', and 'More'. The 'Transactions' tab is selected, showing a transaction named 'Name Here'. Below the transaction name, there are buttons for '+ Follow', 'Invoice', 'Create/Manage Transaction Items', and 'Artwork Movement & Delivery'. The status bar shows 'Presentation', 'Negotiation', 'Sold', and 'Not Sold'. The 'Charges' tab is selected, showing 'Transaction Expenses (0)' with a 'New' button circled in red. The right sidebar shows the 'Activity' tab with a 'Log a Call' button and a 'New Task' button. Below these are filters for 'All time', 'All activities', and 'All types', and a section for 'Upcoming & Overdue' with a message: 'No next steps. To get things moving, add a task or set up a meeting.' and 'No past activity. Past meetings and tasks marked as done show up here.'

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.

The screenshot shows the 'New Transaction Expense' form. It has two main sections: 'Information' and 'Comments'. The 'Information' section includes fields for 'Expense Name' (Transportation), 'Amount' (\$20,000.00), 'Transaction' (Name Here), 'Tax' (None), 'Display in Invoice' (checked), 'Additional Artwork Discounts' (unchecked), 'Tax Type' (None), and 'Reason for Tax Waive' (None). The 'Comments' section has a 'Comments' field. At the bottom, there are buttons for 'Cancel', 'Save & New', and 'Save'.

The screenshot shows the Salesforce ArtSmart Gallery interface. The top navigation bar includes 'Home', 'Chatter', 'Tasks', 'Contacts', 'Companies', 'Group & Invitations', 'Artworks', 'Artists', 'Transactions', 'Artwork Proposals', and 'More'. The 'Transactions' tab is selected, showing a transaction named 'Name Here'. Below the transaction name, there are buttons for '+ Follow', 'Invoice', 'Create/Manage Transaction Items', and 'Artwork Movement & Delivery'. The status bar shows 'Presentation', 'Negotiation', 'Sold', and 'Not Sold'. The 'Charges' tab is selected, showing a list of charges. The right sidebar shows the 'Activity' tab with a 'Log a Call' button and a 'New Task' button. Below these are filters for 'All time', 'All activities', and 'All types', and a section for 'Upcoming & Overdue' with a message: 'No next steps. To get things moving, add a task or set up a meeting.' and 'No past activity. Past meetings and tasks marked as done show up here.'

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		Client Information	
ArtSmart 135 Boulevard Malesherbes Paris, 75017, France		Name Here email@email.com	

ARTWORK		PRICE
Title: New Artwork		\$30,000.00

Total Artworks Amount	\$30,000.00
Total Artworks Discount	-\$1,451.87
Subtotal artworks	\$28,548.13

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

Total Tax Amount	\$1,854.49
Total transaction amount	\$48,500.00

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem. Nulla consequat massa quis enim. Donec pede justo, fringilla vel, aliquet nec, vulputate eget, arcu. In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Nullam dictum felis eu pede mollis pretium. Integer tincidunt. Cras dapibus. Vivamus elementum semper nisi. Aenean vulputate eleifend tellus. Aenean leo ligula porttitor eu, consequat vitae, eleifend ac, enim. Aliquam lorem ante, dapibus in, viverra quis, dui. Phasellus viverra nulla at metus varius laoreet. Quisque rutrum. Aenean imperdiet. Etiam ultricies nisi vel augue. Curabitur ullamcorper ultricies nisi. Nam eget dui. Etiam rhoncus. Maecenas tempus, tellus eget condimentum rhoncus, sem quam semper libero, sit amet adipiscing sem neque sed ipsum. Nam

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.

The screenshot displays the Salesforce interface for ArtSmart Gallery. The top navigation bar includes the ArtSmart Gallery logo, a search bar, and various menu items: Home, Chatter, Tasks, Contacts, Companies, Group & Invitations, Artworks, Artists, Transactions (selected), Artwork Proposals, Consignments, and More. The main content area shows the 'Transaction Name Here' record page. The 'Invoice Settings' section is expanded, revealing several options: 'Display Discount Per Artwork' (unchecked), 'Display Banking Information' (unchecked), 'Display image on the invoices' (checked), 'Display Amount Paid and Amount Due' (unchecked), and 'Display Payment History' (unchecked). Below these settings is a text area for 'Invoice Notes' containing the placeholder text 'Invoice notes here'. At the bottom, there is a 'Bottom Paragraph' section with a disclaimer text. The footer of the form shows 'Created By: Admin Artsmart, 3/30/2020, 1:50 PM' and 'Last Modified By: Admin Artsmart, 3/30/2020, 2:31 PM'. At the very bottom are 'Cancel' and 'Save' buttons.

Transaction Name Here

Follow Invoice Create/Manage Transaction Items Artwork Movement & Delivery

Invoice Settings

Display Discount Per Artwork ☐

Display Banking Information ☐

Display image on the invoices ☒

Display Amount Paid and Amount Due ☐

Display Payment History ☐

Invoice Notes

Invoice notes here

Bottom Paragraph

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem. Nulla consequat massa quis enim. Donec pede justo, fringilla vel, aliquet nec, vulputate eget, arcu. In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Nullam dictum felis eu pede mollis.

Created By
Admin Artsmart, 3/30/2020, 1:50 PM

Last Modified By
Admin Artsmart, 3/30/2020, 2:31 PM

Cancel Save

MARKED AS SOLD:

Once your transaction is marked as sold:

- Commissions are produced.
- Client now appears as owner of the artwork.

The screenshot shows the 'New Artwork' page in the ArtSmart Gallery system. The top navigation bar includes links for Home, Chatter, Tools, Contacts, Companies, Group & Invitations, Artworks, Artists, Transactions, Artwork Proposals, and Commissions. The main content area displays transaction details for a company, including 'Total Transaction Amount' (\$48,500.00) and 'Total Amount Due' (\$48,500.00). A progress bar at the top indicates the status is 'Sold'. Below this, there are tabs for Details, Artworks, Charges, Commissions, Payments, and Attachments. The 'Commissions' tab is active, showing a table with columns for 'Artist Commission (0)' and 'Gallery Commissions (0)'. On the right, there is an 'Activity' section with a 'Log a Call' button and a 'New Task' button. Below that, there is an 'Upcoming & Overdue' section with a 'No next steps' message.

The screenshot shows the 'New Artwork' page in the ArtSmart Gallery system. The top navigation bar includes links for Home, Chatter, Tools, Contacts, Companies, Group & Invitations, Artworks, Artists, Transactions, Artwork Proposals, and Commissions. The main content area displays information for a new artwork, including 'Title', 'Artist', 'Year of Work', 'Category', 'Medium', 'Movement', 'Abstract', 'Number of Editions', 'Type', and 'Display/Storage Location'. On the right, there is an 'Owner' section with fields for 'Owner', 'Public Price', 'Acquisition/Consignment Amount', 'Artist Commission %', 'Acquisition/Consignment Date', 'Production Cost', 'Production Costs paid by', 'Insurance Value', and 'Contact Owner'. Below this, there is an 'Upcoming & Overdue' section with a 'No next steps' message.

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

The screenshot shows the 'New Artwork' page in the ArtSmart Gallery system. The top navigation bar includes links for Home, Chatter, Tools, Contacts, Companies, Group & Invitations, Artworks, Artists, Transactions, Artwork Proposals, and Commissions. The main content area displays installation and commercial information for a new artwork. The 'Installation (Notes)' section includes fields for 'Maintenance (Notes)', 'Restoration (Notes)', 'Condition / Conservation Notes (Legacy)', and 'Provenance & Current Location (Legacy)'. The 'Commercial Information' section includes fields for 'Last Sale Information' and 'Sold For @ \$28,500.00'. The 'Logistic Section' includes fields for 'Transportation Recommendations' and 'Insurance Information'. The 'Edition Manager' section includes fields for 'Edition Manager' and 'Edition Model'.

The screenshot shows the 'New Artwork' page in the ArtSmart Gallery system. The top navigation bar includes links for Home, Chatter, Tools, Contacts, Companies, Group & Invitations, Artworks, Artists, Transactions, Artwork Proposals, and Commissions. The main content area displays the 'Owner History' section, which includes a table with columns for 'Contact Owner', 'Account', 'Current Owner', and 'Artwork Owned: Created Date'. Below this, there is an 'Activity' section with a 'Log a Call' button and a 'New Task' button. Below that, there is an 'Upcoming & Overdue' section with a 'No next steps' message.

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.

Transaction Payment
TP-061

Pay Refund (DEPRECATED) Electronic Payment

Electronic Payment

Electronic Payment ID:
No Electronic Payment Created

Message to the Client

Salesforce Sans

To Whom It May Concern,
Here is the agreed invoice for the first payment. You can pay by clicking in this link.

System Information

Created By:
Admin Artsmart, 3/30/2020, 2:27 PM

Last Modified By:
Admin Artsmart, 3/30/2020, 3:05 PM

Cancel 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.

Electronic Payment

PAYMENT NO: TP-060

* SEND TO

email@email.com

AMOUNT DUE	AMOUNT	BILLED TO	PAYMENT DATE
\$38,500.00	\$48,500.00	Name Here	March 30, 2020

LINK: No Electronic Payment Created

Create Invoice Send Invoice

Cancel