

POS Implementation Committee Meeting

Thurs, Aug 31, 2023

Attendees: Tina, Val, Joy, Amanda, Lance, Jean

Agenda/Items Discussed

Purchasing & Installation:

- Purchase hardware (COMPLETED – delivery arrived 8/10/23 – cash box 8/11 – other items 8/16 (receipt printer/bar code scanner)
- Subscription has been purchased
- Installation activities (8/18) – Frank to set up square system on 8/18 – can also try to scan existing bar codes with the new system – COMPLETED (8/14)

Prep for Demo System for Training

- Any activities to be completed to prep Demo system? Frank clarifying the following with Rose:
 - Confirm process to “synch demo data” – does that mean synching data in Rose with Square? COMPLETED last week – our inventory is now in Square
 - Notify Rose as to when we’re getting hardware - COMPLETED
 - Clarify with Rose the ability to bring over Intuit “Item Name” for reference in register and portal – COMPLETED & loaded this week of 8/21
 - At cutover, do we work with Rose resources on that day? What time? Duration? Etc. (overall procedure) – set up con-call with Tina, Amanda, Rose consultant to start planning go live?
 - Frank has a demo procedure for data migration to review with Tina - reviewed
 - Mike suggested we prepare our spreadsheet of Intuit data on Monday evening, email to him when done, and he would load Tuesday morning – plan to enter shop early that Tues to check live system and inventory for accuracy – we confirmed our planned go live date with Mike & have a plan in place for cutover on Monday eve/Tues morn, 9/24 & 25
- This committee is hoping to have demo system we can start training the core training team with by the end of the week of Aug 21 – demo database availability? It’s available - COMPLETED

Training session for this core group

- Preferring in-person training for this core group - train in back room if possible – scheduled for Friday, 8/25, at 11:00 am
 - Frank coordinated a Zoom training session with Mike at Rose at the same time as this in-person training session – Frank will attempt to schedule the Square session with Mike (11 MT) – training session confirmed by Frank 8/18 – COMPLETED (recording is available)

- Another Zoom training session with Mike (for Rose software) has been scheduled for Tues, 8/29, at noon MT – COMPLETED (recording is available)

Training sessions for membership

- Topics:
 - Open shop
 - Credit, Debit, Cash transactions
 - Shift change
 - Close shop
 - Print tags
 - Work with remote app
 - Process for producing necessary accounting reports (admin)

Tina/Frank have a first draft of a guide to be reviewed/updated with details/expanded upon – would like to review with this team during this 8/31 meeting
- Training methodology:
 - Videos – shortly after festival (week of Sept 11) – need to get done next week!
 - Frequency/Schedule
 - In person
 - Frequency/Schedule – schedule multiple sessions across 2 weeks (week of Sept 11 & 18?) – Jean available for training week of 9/18 – can someone lead this activity to set the schedule?
 - Number of attendees in each session – limit to 5 per session – hold multiple sessions & membership can sign up to come to in person training (week of Sept 11 & 18?) – can someone lead this activity to offer training slots to members (same person coordinating the schedule?)?

Implementation

- Date of existing inventory migration
 - Need to plan to perform knowledge transfer from Frank to other members on this committee to perform the “go live” data transfer/final mapping/synching of existing inventory with Rose resources – KTM completed with Tina & Tina was successful at loading inventory week of 8/21
 - Need to introduce those managing the data transfer to the Rose contacts - COMPLETED
- Go live date on Rose Square in shop – week of Sept 25 (download data from Intuit, manipulate Intuit spreadsheet into required Rose format, deliver formatted spreadsheet to Rose, Rose resource uploads spreadsheet) – planning go live on on Tues, Sept 26

- Currently not planning to close shop for go live
- Currently planning go live on 9/24 & 9/25
- Jean mentioned that she may be able to come into the shop for AM and PM shift starts times the week of September 25 for post go-live support – still an option?
- “Freeze data” for inventory entry to start communicating to membership – end of business on Sunday, Sept 24

Open Items (in order of priority):

- Training Items listed above (material development, training schedule, member sign-up)
- Can the festival NOT give out our prior paper gift certificates and, instead, take prize winners email addresses for future e-gift cards? We need to confirm this before this weekend!
- Follow-up with Mike re: being able to use our current printer (TSC TTP-244CE) (using templates from Zebra - ZDesignerTLP2844) – can someone tackle trying to print labels from the Rose portal and confirm what label templates we need (and/or confirm if we need a different printer so we could get it ordered ASAP)?
- This team needs to formulate a plan for gallery show inventory entry:
 - For Oct show - Use take-in function/who performs entry
 - Long-term solution – who performs entry (committee formed, gallery committee, visiting artists?)
 - Confirm steps involved:
 - Enter visiting artist as “Contract”
 - Enter visiting artist items in Take-In – then post to Inventory
 - Run Inventory Report, sort XLS by Contract, delete all inventory NOT belonging to visiting artists, give to Kathy to test import into her card-creation application
 - After show is over, set visiting artist contracts as “inactive” (suggestion from co-op in Fort Collins (Frank inquired))
- Need to consider vendor naming conventions (i.e., PBPxxxx, HMxxx) – checking w/ committees to confirm which vendor info needs to xfer to Square – Amanda heard back from Holiday Market Joy was to check with PBP – do we have this confirmed?
- Need to assess how to handle physical gift cards that are out in the public right now – maybe an manual discount can be applied to the purchase if someone comes in with – can someone research how this can be done (we may have a prior gift certificate come in at any time)?

PARKING LOT:

- Brand field holding different data – Tina suggesting we “parking lot” this item for now

- Gift certificates – need to formulate plans for deploying e-gift cards – Tina suggesting we “parking lot” this item for now
- Need to start looking at how discounts work in the system for member discounts, etc. – reviewed with Mike – some limitation to what we can do – Tina suggesting we “parking lot” this item for now

UPDATES RE: COMPLETED ITEMS:

- Ask Mike about limit on # of consigners in system at 1-time – there are no limits to # of vendors/contracts in Rose
- Need to start scanning our labels – we successfully scanned labels
- Need to address multiple item discounts (Helen, Ray, Kelly, Tina, Joy) – we would like to suspend the multi-item discount program to revisit in 2024 – Joy sent notification of suspension to these artists
- Need to discuss AOM program – we would like to suspend the AOM to revisit in 2024