

POS Implementation Committee Meeting

Thurs, Nov 9, 2023

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

Items Reviewed/Discussed:

- Is Patty getting the reports she needs? She was able to process October without issue and to get the info she needs as of now (per her update to us via email)
 - Amanda noticed that some HM items that are categorized in Rose as “holiday market” are showing up after being sold as “uncategorized” on reports – confirmed no category on those items – corrected in meeting
- How did the payouts process go at the end of October? Payouts were successful for the month of October – there were some issues identifying Square items but members have started using their initial codes again
- How is the batching going? Do we need to make any adjustments to the process thus far? Amanda has been running it about every 3 days – some of us have been helping when things looks like they are matching up – when we have online sales, we would like to make sure the 90% is identified in the batch before it is posted – Amanda’s preference would be to do the batching and she’ll let them team members know if she needs any assistance with running the batch
- PBP sales - Square vs. Rose - where will we capture the sales? How will we enter the artists/print tags, etc.? The variable tile method seems to be the most efficient and the quickest way to proceed – Amanda will add PBP as a category to support this method – there will be a single bar code sticker per artist that can be used to prompt bringing up the variable tile & entering of a price OR the cashier can scroll to find the “variable tile” for that particular artists – Square reports are going to be available for Patty to sort by the artist – visiting artists will have a contract number in Rose
- We had a lengthy discussion re: entering visiting artists only in Square vs. entering in Rose & we’ll need to test this further down the road
- Accessing reports from Report Manager in Square (where does this sit? Mike didn't reply to my last email re: him running the report for us – Tina sent another request to Mike the week of 11/6 – Frank is going to contact Mike about this again and will let us know
- Contacting Mike again about our list of outstanding issues/feature requests – Tina sent another request the week of 11/6
- Frank heard from Mike re: his printing from home issue – Kathy tried it and was successful – the bar codes can be read but they are still not centered
- Amanda is going to try a test of a Square 20% discount for members to use when purchasing other members items and we’ll attempt to give this option to members starting during the holidays and the only “con” to this item would be that the portal reports may not be 100% accurate BUT the members will be paid correctly due to Amanda’s and Patty’s manual adjustments they will be doing on the back-end

To Do:

- 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 if quantities can be set at zero