ARTLOOK

SOFTWARE

for Galleries & Dealers

Artlook Software

Quick Start Guide

Artlook Software – A Quick Start Guide

In this guide you will learn how to accomplish the basic tasks of setting up an inventory database together with:

- Configuring and personalising the system
- Setting up artist records
- Creating events and exhibitions

For further assistance in using Artlook, email us at support@artlooksoftware.com

Use the on line help system within Artlook for further information.

1. Getting Started

Once Artlook has been installed on your system you can start the program by clicking on the desktop icon.

The main screen is divided into four areas:

The Menu

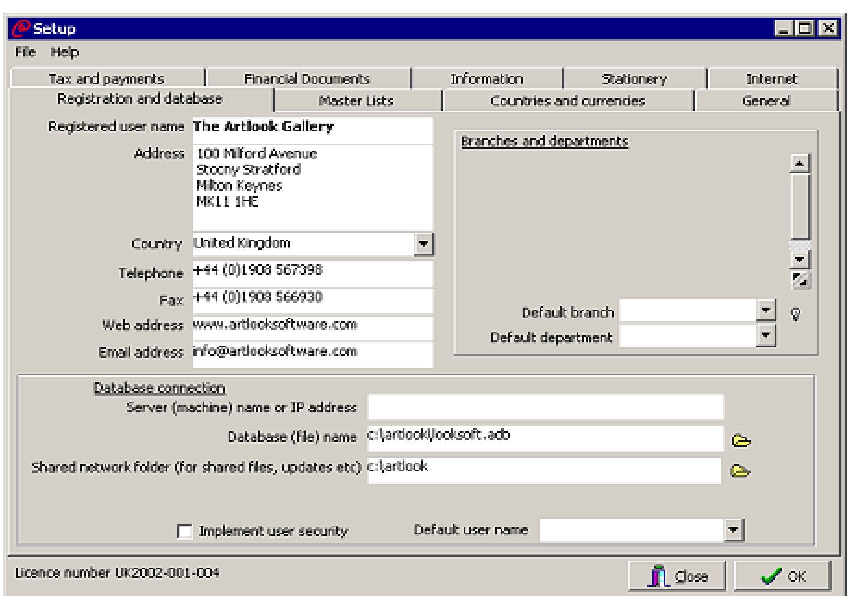
The Program Icons, Search and Filter Boxes

The Shortcut Panel

The Display Area

As a first step, before you begin to enter any stock items, there are various program settings which we recommend that you review and change as necessary to suit the way you work.

All general settings are contained in the Preferences section of Artlook. To access this area click on Tools from the Menu and then select Preferences. The screen that you will see will be similar to that illustrated below. At the top of the screen the various Preference sections are shown on “tabs”,



There are many configuration options available– for the purposes of this guide we will be looking only at those which are immediately relevant to setting up a basic database

Setting your preferences

Work through the following sections.

a. Your details

The first Preferences screen is headed "Registration & Database". The only settings which need to be changed here are your company's name and address details.

Start by clicking in the field labelled "Registered User Name". If there is already text in this field click or position your cursor at the beginning of the field and hit Delete until the field is empty. Enter your company name. Now click on the address box. Again, if there is already text here hit Delete until it is empty. Now enter your address details hitting Return/Enter after each line.

The Country field will automatically default to United Kingdom – change this as required. Continue entering details for your telephone and fax numbers, principal email address and web site address.

All of these details which you have entered can be changed at any time.

b. Master Lists

Artlook enables you to maintain Master Lists of items which you use repeatedly. These can be selected from drop down boxes and make entering data much faster as well ensuring consistency. Examples of Master List items are Medium, Stock Types, Artist Styles etc.

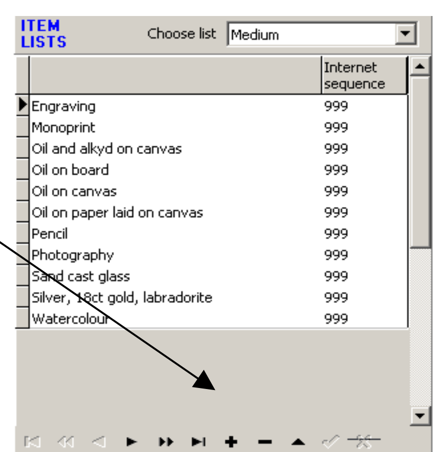
In many cases it is possible to create new Master List items "on the fly" but it is a good discipline to set up some lists before you begin entering stock. You can change or add to these lists at any time.

Choose the Master Lists tab. There are two list sections – Contact Lists and Item Lists. Contact Lists are not relevant unless you are maintaining a client database. To the right of "Item Lists" there is a drop down list headed "Choose List". Click on the drop down arrow to see the various list types available to you. The process of adding, changing and deleting entries is the same for all lists.

As an example we shall put some entries in the list for Medium. Choose Medium from the drop down list and you will see a screen similar to this.

To enter a new list item click on the + symbol. This will open a new line in the list.

Type your entry and when ready click on the black tick symbol just to the right of the + sign. To delete an entry click on the minus sign.



The Internet Sequence number is set automatically and does not need to be changed

Tip:

The way in which you enter any item in a list will influence its display on your web site. Consistency and accuracy is therefore important. For instance, if you want all items to be displayed in lower case you should enter them like that in the list. The initial letter of each item is important from the point of view of how the list is displayed within Artlook– ensure that all entries start with a letter in the same case.

Please ensure that you make some entries in the list labelled “Stock Type” – these should be relatively generic descriptions for stock (Painting, Engraving, Furniture, Sculpture etc.). A stock type must be applied to all items and can be used to determine the sorting of displayed items.

c. General Settings

Click on the Preferences tab marked General.

There are only two settings here which may need to be changed. The first is the “Units of Measure”. Your choice from the drop down list is either metric or imperial. Be aware that Artlook automatically converts from one format to another but still needs to know the base setting which you will be using. For reasons which shall become clear when you begin entering stock we would recommend that you choose Imperial since this gives greater control over the display of fractions.

The only other setting which may need changing on this tab is the “Inventory Method” field. This determines the basic sorting order for your stock items – again this can be changed or overridden at any time. The default setting is to sort items for display by Artist name and this is the most commonly used method. The alternative method is “Category” – this refers to the Stock Type as described above.

Before leaving the General tab you may wish to place a tick against the field labelled “Save position and size of main form” – this ensures that Artlook remembers your choice for how you view the program, either full screen or in a window, and will save you having to resize each time you start.

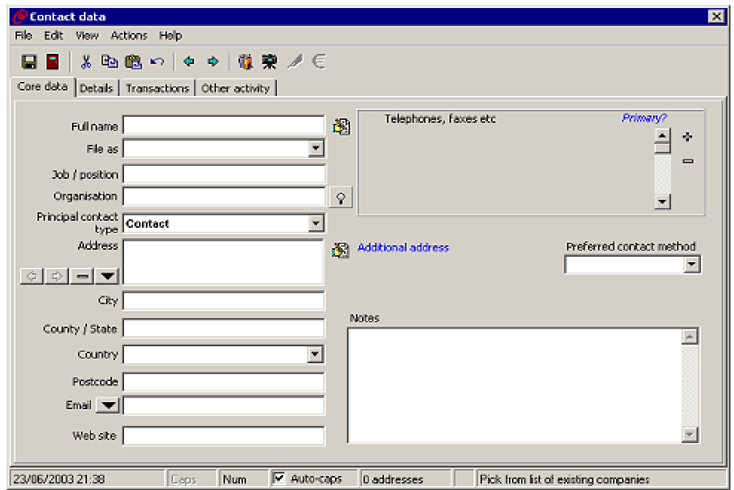
Once you have completed these changes within the Preferences section click on the green OK button to be returned to the main Artlook screen. You should quit and re-start the program to ensure that all of your changes are in effect. To do this, either click on the cross at the top right of the screen or choose File | Exit.

2. Setting up artists and basic contact records

Each artist for whom you have a stock item must be created as a new Contact record together with any ancillary information such as biographies, exhibition histories etc. Additionally it is necessary to set up some "generic" contact records for use when creating stock items.

To begin, click on Contacts from the Shortcut Panel on the left. The main display will change to show any contact records already on the system (a basic installation includes some examples).

a. Setting up an artist



Click on File | New | Contact (or click on the Insert a New record icon). An empty contact record screen will appear as below:

Click first on the drop down arrow to the right of the "Principal contact type" field and select Artist from the list.

Now click in the Full Name and type the name of the artist. This name should be as you would wish it to appear on on any print outs.

Include in the full name any "title" (such as Lord, Sir etc.) but do <u>not</u> include any honorifics or qualifications (such as Bt, FRSW, RA etc.) While you can of course enter up any additional details if you wish no more is necessary at this stage. Artlook will automatically enter a "File As" value which determines the sequence for displaying this entry. The default is almost invariably appropriate but you change this by selecting an alternative, or even by entering in your own value.

Click now on the Details tab. The only field which may need completing here is that labelled "Suffix or qual" – enter here RA, FRSW, BA etc. if relevant.

At the simplest level the record can now be saved and you will have sufficient information to link this artist with a new stock item, However, it is worth spending some time looking at the Artist specific information which can be attached to their contact record by clicking on the Artist Data tab.

To save your work and put the new artist into the Contacts database click on the Save and Close icon. <u>Closing the record in any other way risks losing your work!</u>

Once saved you will be returned to the main Contacts screen. If you do not see your new artist listed it is possible that you have a "filter" in operation. The filter box is the right hand of the two text boxes on the same line as the Program Icons. Click on the down arrow and select the blank entry at the top of the list. This will ensure that you are seeing all contacts regardless of their type.

b. Setting up a buyer and a seller record

Before moving on to set up stock items there are two basic contact records which should be created. These will be used when you set up a new stock item and if you wish to mark an item as sold on the system. You obviously do not need to do this if you have already started entering your own contacts or a database has been imported for you.

The process is very simple. Click on File | New | Contact (or click on the Insert a New record icon). In the Full Name field type "Supplier A" (without the quotation marks). In the Address box type "Unknown" (without the quotation marks) No further details need to be entered – click on the Save and Close icon.

Repeat the process and this time type "Buyer A" (without the quotation marks) in the Full Name field and in the Address box type "Unknown" (without the quotation marks). Click on the Save and Close icon.

The system is now ready for you to start setting up stock items.

3. Setting up stock items

Start by clicking on Inventory from the shortcut panel on the left. The main display will change to show any current inventory items (the basic installation of Artlook will include some examples which can subsequently be deleted). If you have some examples take some time to look at the details contained within each item. Double click on a stock item to go into the Stock Details screens and review the type of information which can be recorded. To return to the main display click on File | Exit from within a detailed stock item view.

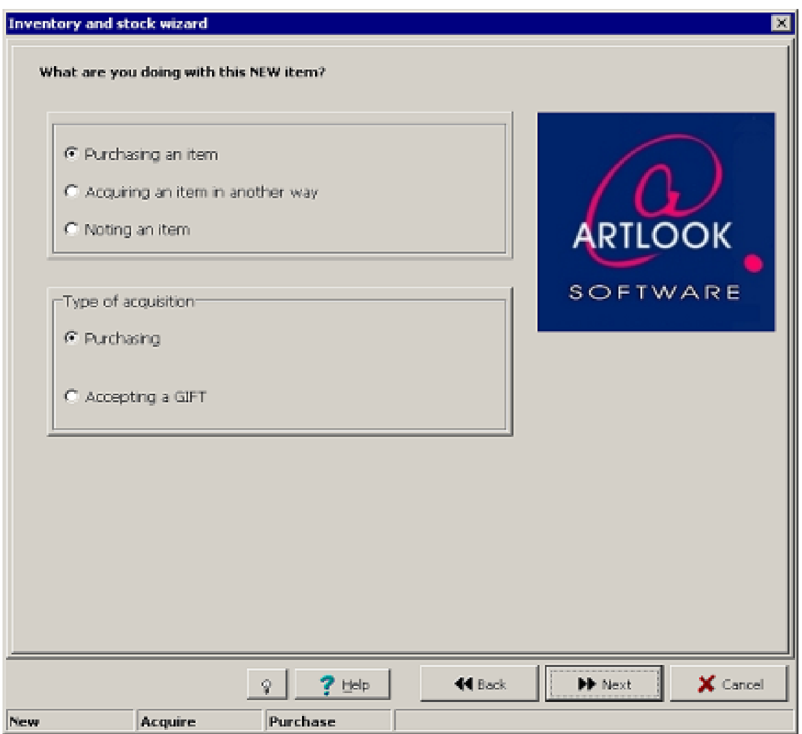
a. Setting up your first item

Putting a stock item into Artlook is accomplished through the Inventory and Stock Wizard. This is a set of screens which will guide you through each necessary step.

Step 1

There are many ways of starting the wizard but perhaps the most straightforward is to right click any where on the main display and choose the fourth menu item marked "New Item".

The first screen appears. The defaults here are that you are "Purchasing a new item". If you are consigning an item in you would choose "Acquiring an item in another way".



Step 2

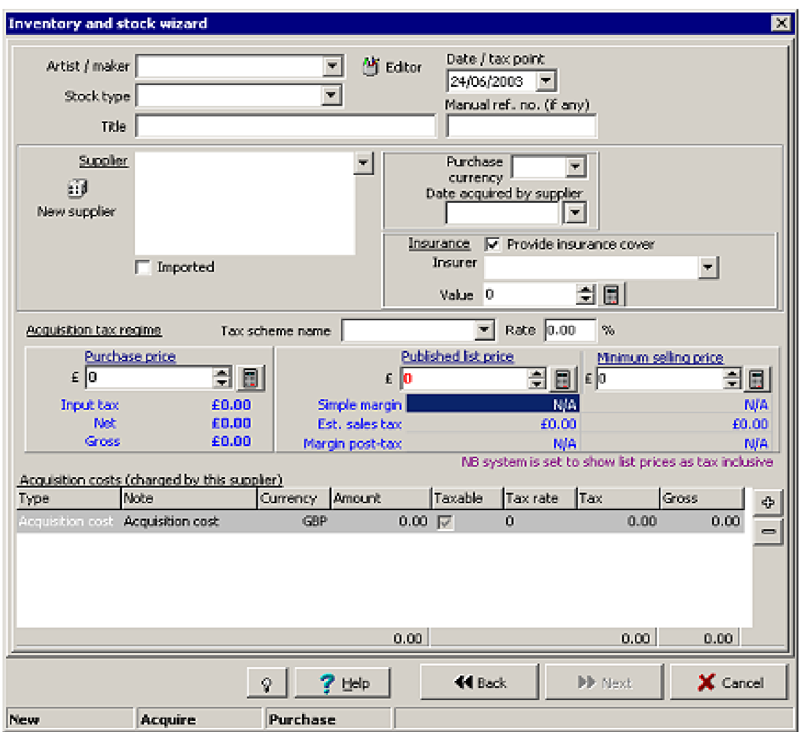
The second screen now appears. This is where you fill in some basic information about your stock item. Note that when you start on this screen the "Next" button at the bottom of the screen is greyed out. This button will not be enabled until you have entered the basic details.

This simplest way of proceeding is to start from the top of the form and work your way down.

Click in the Artist/Maker field. A list will immediately appear showing all the Artists which you created previously. You can search within this list (which is ordered by Surname, Firstname) by typing the first letter or letters of the surname – the more you type the closer you will get to your choice. If the artist you require is not in this list you should Cancel the operation (click on Cancel at the bottom of the screen) and return to the Contacts display to set up the artist – you need do no more than enter their full name to cause them to appear in the list and can always return to their record at a later date to fill in further relevant details.

If you are consigning an item you will need to make your choice between a "fixed price" or commission based consignment.

If your artist is in the list, click on them and their name will appear in the Artist/Maker box.



Step 3

Now click in the Stock Type field. Again a list will immediately appear showing the Stock Types you set up previously. These types are the very general categorisations of your stock. You can of course use any categories but do so on the basis of how you may wish to see stock arranged on your web site – a typical category list may well include just the following items: Painting, Sculpture, Prints. Once again if the item you require is not in the list we would advise you to cancel your work and return to the Preferences | Master Lists section to set these up.

If your required item is in the list click on it and it will appear in the box.

Now enter the title of the piece. We would advise against including catalogue numbers and/or year of creation within the title since these can be entered elsewhere.

Step 4

Your artist will probably be automatically recognised as the supplier of the item (if they have been given an address) but you can select any Supplier from the drop down list.

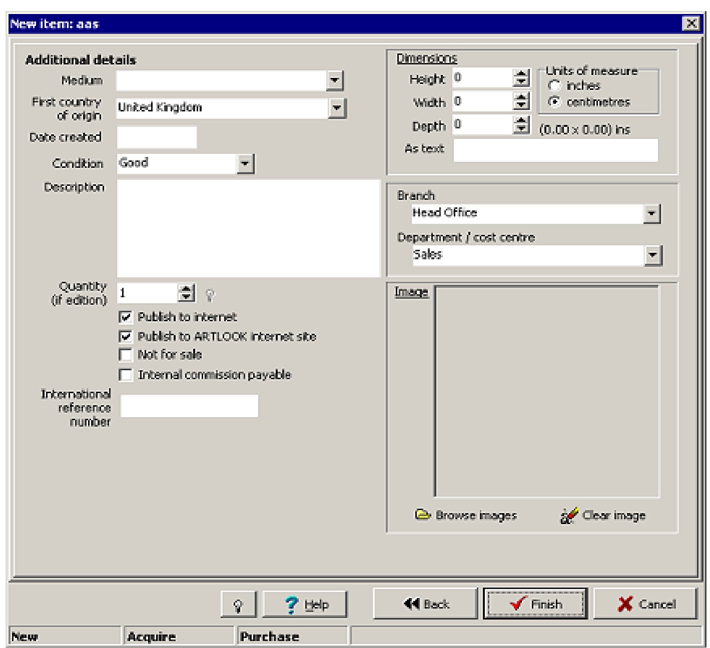
Step 5

Locate the box titled "Published List Price" and enter a value here.

Step 6

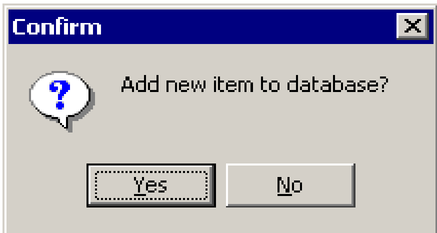
A little below and to the right of the Supplier box you will see a tick mark to the right of a label titled "Insurance". Click once in the box to remove the tick mark. If you do want to record insurance details you should ensure that you have set up at least one Contact record with the Contact Type set to Insurer.

The effect of this last step is to enable the Next button at the bottom of the screen. Click this button and the following screen will appear:

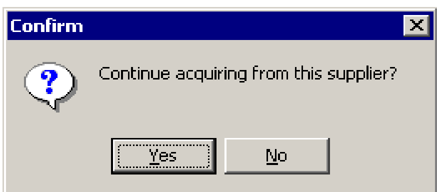


Although this screen clearly shows important fields for Medium, Dimensions etc it is more straightforward to enter this information <u>after</u> the item has been set up so at this point simply click on the red “Finish” button.

Click OK when you see the following box:



And click No when you see the following box:

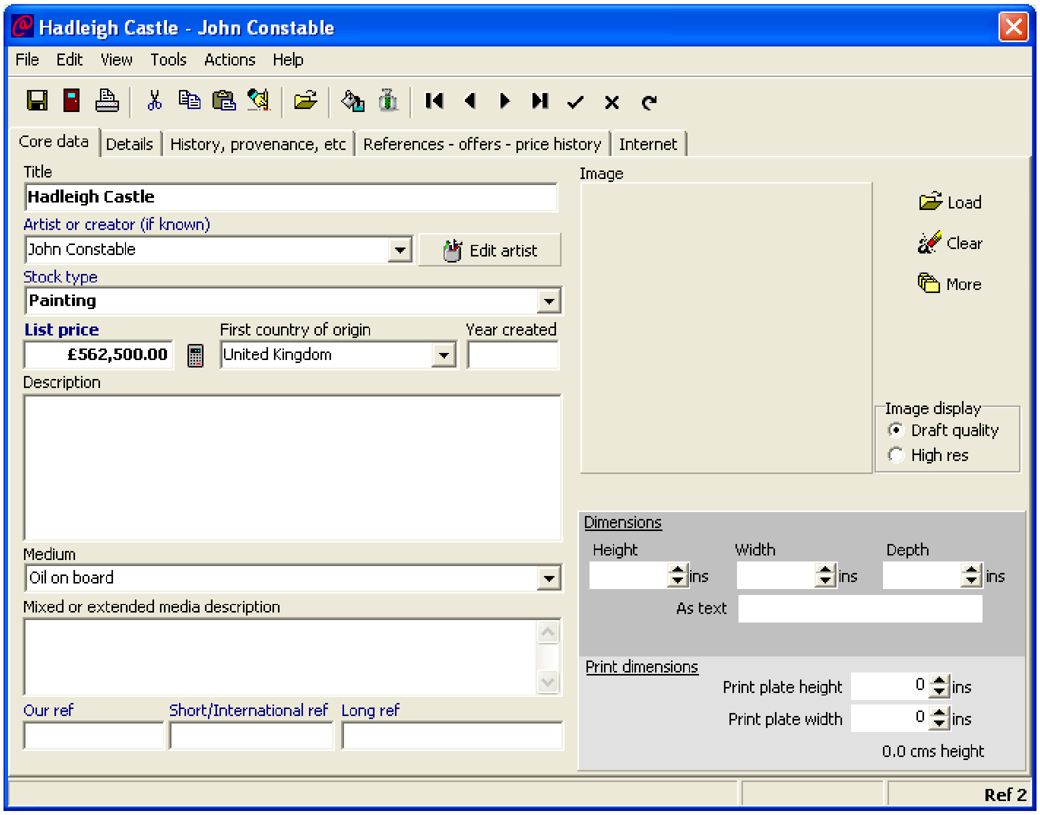


> Tip:
>
> When you are used to the process of setting up items you can click Yes on the above box to significantly speed up the whole process when you are setting up multiple items.

You will now be returned to the main stock display and you should see your new item clearly listed. The next steps involve setting up the details for the new item. If you are entering a lot of items we would advise that you repeat steps 1 through 6 above and then work through each new item in detail adding additional information as required.

Step 7

Double click on your new stock item in the main stock display. This loads the Stock Details screen as below:



As before this guide focuses on the critical data elements only – you are of course entirely at liberty to enter any data which you require. Within the Stock Details screens you can, of course, also edit any of the entries you made previously while "acquiring" the item.

You will see that the screen is divided up into different "Tab" sections. The first section is headed "Core Data". On this screen we need to enter a Medium for the piece, its Date of Creation (if known), its Image and dimensions.

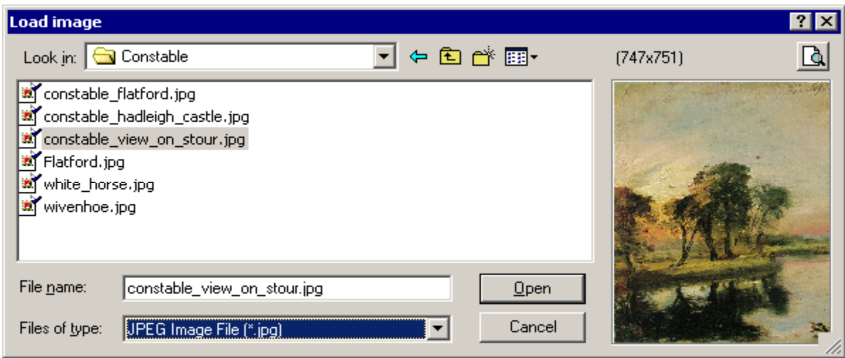
Click in the Medium field to see a list of previously entered medium types. You should always be able to find your required choice in this list. If it is not there you can either cancel your work and set up the new medium type in the Preferences | Master Lists section or you can use the "New Master Item" function. If the item is not in the list right click on the Medium field and choose "New Master Item". Now type your entry in the Medium box and hit Enter/Return.

Now click in the Date Created box and enter the year of creation (if known). You can preface this year with "C.", "C", "c.", "c" if desired.

On the right hand side of the screen click on the "Load new image" button. This will open an Explorer box from within which you can navigate to the location of your image file for this item.

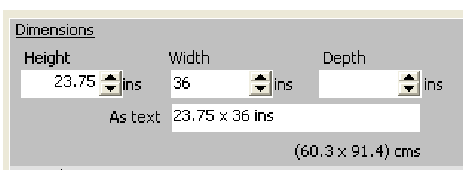
Tip:

You are strongly advised to save any image files that you will be using as JPG format files using a third party imaging application. Keep the image file below 100k wherever possible.



Left click on the file name to see a Preview of the image. Click on the Preview icon at the far right to see a larger version of the image. When you have found the correct file click Open.

Locate the "Dimensions" box. By default the Height, Width and Depth will be set to 0. Enter the correct dimensions in each relevant box. Assuming that you are working in inches and you have entered a Height of 23.75 and a Width of 36 the box will look as below:



Note that on the far right Artlook has automatically provided a metric conversion. Note also that an entry has been made in the "As Text". This field can be edited in any way required – you may for instance want to remove "s" from "ins" or replace "x" with "by". Any changes are permitted. Most frequently, however, you will wish to change the decimal setting to a fraction. To do this, right click on the "As Text" field and choose "Fraction Conversion" from the menu which appears. This will convert all decimal settings in the field to fractions.

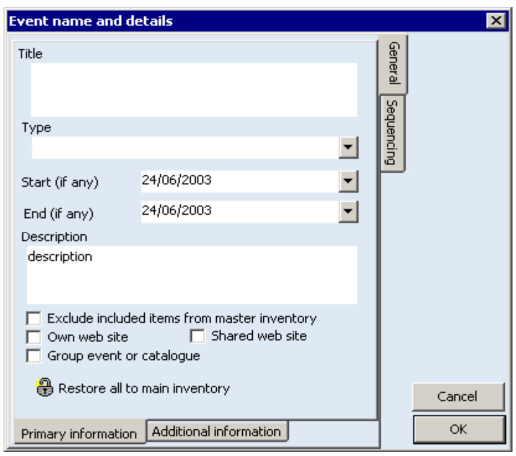
6. Setting up an event

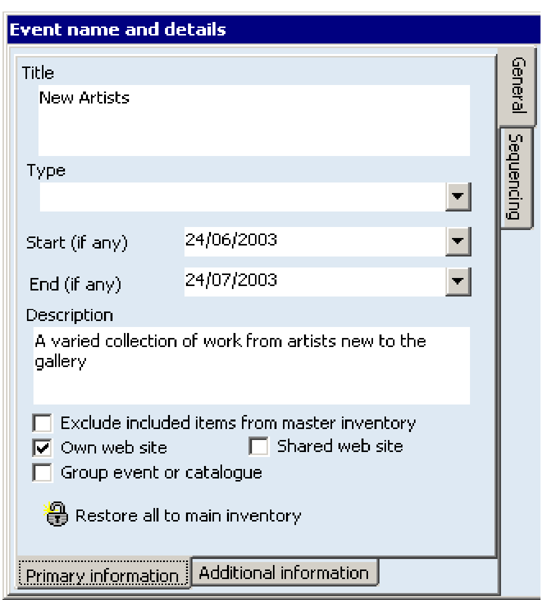
Before working through this section ensure that your web site has been configured to list exhibitions. If you will be showing exhibitions on the site ensure that you have previously created some stock items before continuing.

Step 1

The first step in creating an event is to enter up the basic information (title, date etc.). To do this right click on “Events” in the shortcut panel on the left and choose “New Event”.

The new event box appears:





Enter the title of the event as you would wish to see it displayed on your web site. Enter a start and end date for the event and any more general description you wish to include.

The box on the left contains the basic details for an Exhibition entitled – New Artists.

Click on the OK box when ready.

In the shortcut panel on the left you will now see a small + sign to the left of Events. Click this and the display will expand to show your new event in the Event list. Left click once on the new event name to select it. The main display area will be blank because no items have yet been associated with the event.

Step 2

To attach items to an event proceed as follows.

Make sure that you have previously "expanded" the event list as described above and the name of your event is visible. Click on Inventory from the shortcut panel on the left and ensure that you are viewing your stock in "memo view" style (with images). Locate an item you wish to include in the event. Point at the item with your mouse and hold down the left click button – now drag the item onto the event name. You should now see the name of the stock item beneath the event name. To remove an item from an event – right click on the stock item name in the event list on the left and choose "Remove item from event".

This describes the basic mechanism for creating an event. Artlook provides a wealth of further options for the management of events – refer to the on line Help system for further information.

7. Some common questions

1. *How do I search for an item?*

Artlook provides several options for searching for stock. Use either the Quick Search, Field Search or Advanced Search options from the top of the screen. Quick search can be set to look for Artist or Title. Change it to Title and type the first few letters of the required item – Artlook will immediately locate the item for you.

2. *Not all my stock items are displayed*

Check that the Filter View box at the top of the screen is set to blank so that all items are included.

Check that you have not restricted the view in any other way – right click anywhere and choose View | Restrict View to. Ensure that neither "This Artist" or "This Category" have a tick against them.

3. *How do I delete a stock item?*

There will inevitably be times when you want to delete a stock item. To do this, right click on the item in question. From the menu choose "Inventory and stock wizard". From the first screen which appears choose “Sell, dispose or remove item(s)”. This causes additional options to appear below. From these choose “Deleting – entered in error”. Click on “Yes” to confirm the deletion.

4. *What files should I back up every night?*

You need only backup one file and this is called LOOKSOFT.ADB. To find the location of this file choose Tools | Preferences. On the first General screen you will see an entry labelled “Database file name”. This shows the path and name of the file. This file should be backed to removable media (such as a CD or Zip drive) every day.