



Customer Service: Take Payment for a sale.

This task shows one way that an arts centre takes payment for a sale, using Artist Management System (AMS).

EQUIPMENT: What you will need

 <p>Selected items</p>	 <p>Computer sales system</p>
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SAFETY: How to stay safe

Understand the sales procedure at your art centre.
Keep records of all income and expense.

GLOSSARY: Words you need to understand

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|---------------------|--|
| Retail price | This is the cost that the Gallery or Art Centre sells the artwork for. |
| Sales System | The computer or paper system which is used to record all the information and produce a sale receipt or bill. |

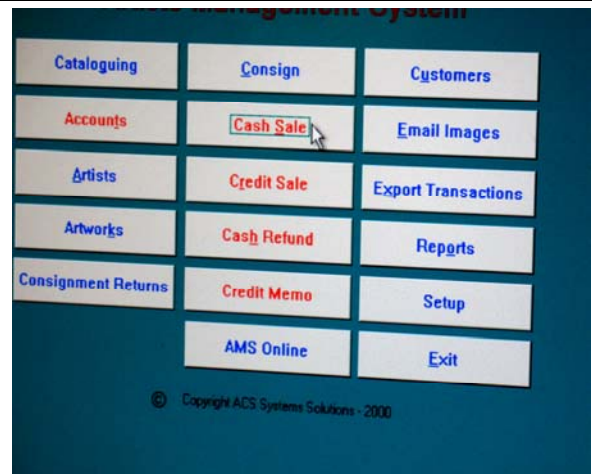
Processing a payment

Take the details of the customer's purchase to the office sales area.

Create a sales receipt or invoice. The example here uses Artist Management System (AMS).

Will the customer be paying for the art work now?

- If yes, you will create a **Cash Sale** or receipt.
- If no, you will create a **Credit Sale**, or invoice.



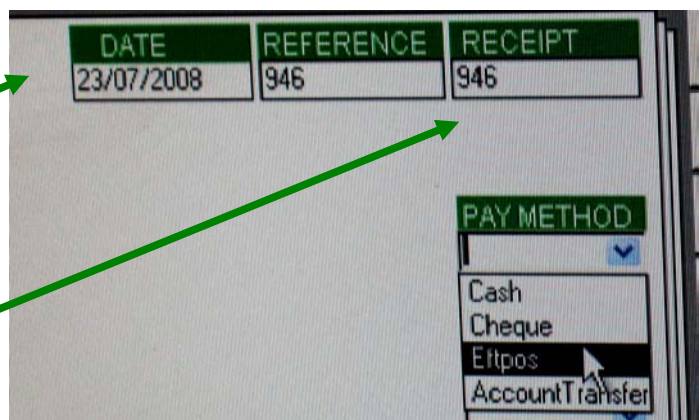
Cash Sale

Select and open **Cash Sale** in AMS.

A green receipt form will open.

Each receipt has the date on it.

Each time a receipt is made and saved, it is given a number. The next time the window is opened for a sale, it will show the next number.

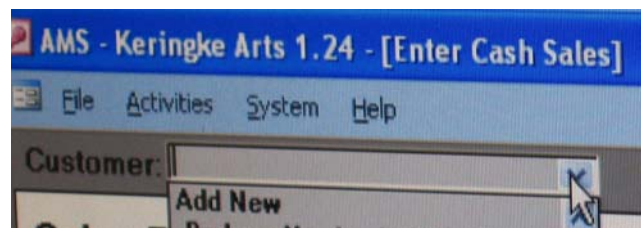


Cash Sale

The rest of the receipt needs your input. Who is your Customer?

Here you have choice of:

- Add New.
- Cash Sale.
- Someone already on the list.



Is your customer likely to buy a lot of times from you, or to need a credit sale?

- If Yes, use **Add New**.

Is your customer someone who has already bought from you in the past?

- If yes, they may already be listed by name in the Customer drop down menu.

Is your customer someone who may not buy again and who is not purchasing an important art work?

- If yes, choose the option from the drop down menu called **Cash Sale**.

Please remember that each art centre has their own system, so check with your manager first to make sure you are using the right options. Words and methods will vary between art centres.

Sale – new customer

If you have opened a Cash Sale receipt your form will be green and it will say:

Sell to:

If you have opened up a Credit Sale invoice your form will be blue, and it will say:

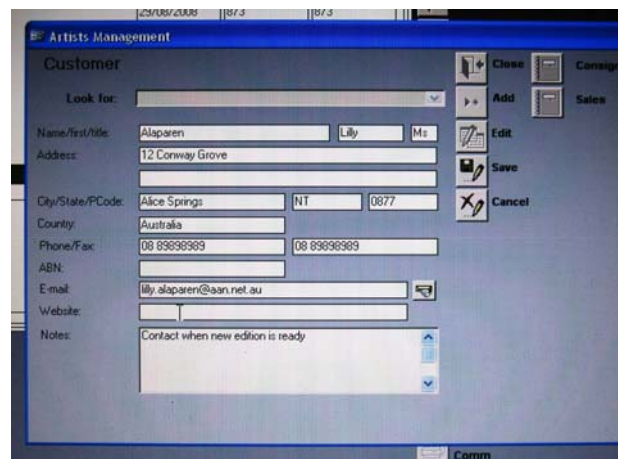
Bill to:

If the customer is new and you decide to save their name in your customer records you must put all their details in the next window:

- Select **Add New** under Customer.

A smaller window will pop open and you must fill all the details in that are important for the art centre to keep.

- **Do not** use the first line where the text reads **Look For : Add New**
- Fill out the name in the next line: Family name, first name, title



Credit Sale – existing customer

If your customer is already an existing customer and you have checked that they are allowed to make a Credit Purchase, proceed to make out the Bill in the same way as making out a Receipt.

You must have permission from the manager or through your art centre policy for giving credit accounts before you agree to let anyone purchase this way.

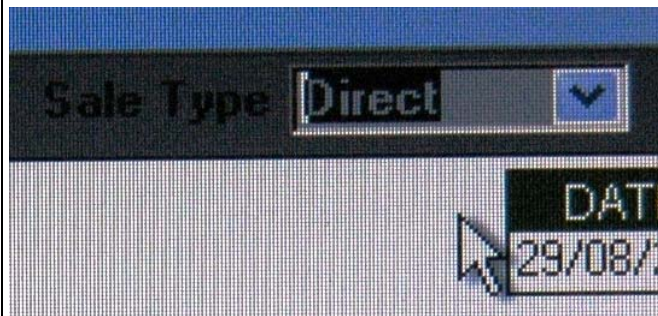
- Add existing customer name or new name from list.

The screenshot shows a software interface for creating an invoice. At the top, there are menu options: File, Activities, System, Help. Below the menu, there is a dropdown for 'Sale Type' set to 'Direct'. The main area is titled 'Invoice' and contains several fields: 'DATE' (30/08/2008), 'REFERENCE' (531), and 'INVOICE' (531). There is a 'BILL TO' field with a cursor. To the right, there are dropdown menus for 'PAY METHOD' and 'COMMISSION'. Below these is a table with the following columns: CATALOG ID, CATEGORY, DESCRIPTION, QTY, RATE, GST, GSTAMT, GSTCom, and AMOUNT. The table has one row with a '*' in the first column, '0' in the QTY column, '\$0.00' in the RATE column, a checked box in the GST column, '\$0.00' in the GSTAMT column, '\$0.00' in the GSTCom column, and '\$0.00' in the AMOUNT column. On the right side of the interface, there are buttons for 'Close', 'Add', 'Edit', 'Save', 'Cancel', 'Delete', 'Consmt', 'Invoice', and 'Print'. At the bottom right, there is a 'Balance Due:' field.

Type of Sale

Select **Type of Sale**: There may be a number of choices about the type of sale and it will depend on your art centre policy. Three common sale types are:

- Wholesale
- Direct
- Gallery



Refer to your art centre marketing policy or ask the manager which type of sale you should select if you are not sure. Each sale price will be different.

- Make sure you use the same sale price that is on the price tag, if works are priced in display area.

Sales from the art centre to a visitor who has travelled there are often called **direct sales**.

Less remote art centres with more public shop access will use a **retail or gallery sale** price list.

Wholesale prices are usually reserved for people who buy a lot and often, or for a gallery, before exhibition commission costs are put onto the art work.

Listing Purchases: Catalogued item.

CATALOG ID	CATEGORY	DESCRIPTION
193-08	Painting	Benita Cavenagh, Untitled,
*	Painting	
	Print	
	Publications	
	Miscellaneous	
	Freight	

Each column needs information if the purchase includes a catalogued item. The catalogue ID from the art work or the tag will then bring all the other information up.

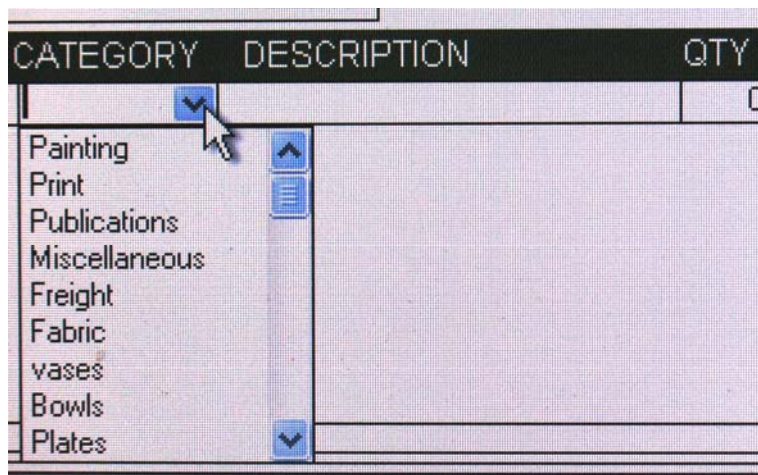
- Check that the information is correct and adjust the price if necessary

Listing Purchases: Uncataloged item.

Select the kind of item from the Category list.

The next steps are:

- Write something into the description.
- Put how many of each item.
- Put the price of each item.



The program will add them up and put a total in each line.

CATALOG ID	CATEGORY	DESCRIPTION	QTY	RATE	GST	GSTAMT	GSTCom	AMOUNT
*			0	\$0.00	✓	\$0.00	\$0.00	\$0.00

Finalising the Sale receipt or bill.

You might sell some items which are catalogued and some which are not catalogued at the same time. Each row on the form must be filled out for each different kind of item or catalogued art work.

- The program will add all the lines up to create the final sale amount at the bottom of the form.
- The form will also show how much GST (salestax) the customer is paying on the purchase.

When everything is listed correctly, **save** the sale.

Select **print** to make the customer a copy of the sales receipt or bill.

TIPS: Ideas that will help

A printed sales receipt or bill may look like this. It must include:

- The art centre name.
- The art centre ABN (business trading number).
- The amount of GST the customer is paying.

This information will be included on every receipt or bill you print because it is recorded onto the computer program and ready to use.

If you need to make a receipt or bill out by hand, you must write those things down and call it a TAX Receipt or TAX Invoice.

Item	Catalog ID	Description	Qty	Rate	GST	Sale Price
Freight		2 cartons	2	\$63.63	\$12.72	\$140.00
Publications		books	6	\$22.72	\$13.63	\$150.00
vases		game vases	4	\$45.45	\$18.18	\$200.00
Platters		triangle	1	\$130.00	\$13.00	\$143.00
vases		flat round	2	\$177.27	\$35.45	\$390.00
vases		med vase	3	\$101.81	\$30.54	\$336.00
Bowls		small bowl	3	\$43.63	\$13.09	\$144.00
Plates		small square	4	\$60.00	\$24.00	\$264.00
Plates		small round	6	\$43.63	\$26.18	\$288.00
Amount Payable					\$186.79	\$2,055.00
Sales Total						\$3,368.21
GST Total						\$186.79
Invoice Total						\$3,555.00

Getting used to the system that is being used at your art centre and knowing how sales work is very important.

Being comfortable talking to strangers can take some time, so practising with other people in the art centre is a good way to begin.