countersketch 2.5 STUDIO

# VERSION 2.5 User Guide Addendum

# What's New
# Version 2.5

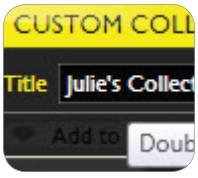
Welcome to CounterSketch Studio 2.5

## Inventory Mode

Take control of your library with custom jewelry collections exclusive to your store. This new feature allows you to easily create and manage multiple collections designed by any number of CounterSketch users within your store with each design customized and saved to your specifications. Publish the design to your searchable library rendered in any metal color and gemstone combination. Now when you search within CounterSketch Studio you are not limited to the stock Starting Point Inventory, but can choose to search your unique items saved the way you want them to display!

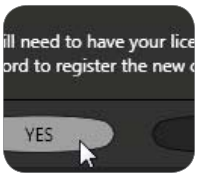
## Custom Prototypes

Order custom-designed prototype samples right from Inventory Mode. The corresponding design is saved in your Custom Collection so the prototype your client holds in their hand matches exactly what's on screen. The beautifully-crafted prototypes look like the real deal. And because they are 'brass and glass', if you choose to do so, you can allow customers to browse your jewelry independently and enjoy a stress-free shopping experience. Create your own display or purchase an interactive display from Stuller.




## Managing Portfolios

Clean up your old and out-of-date portfolios. View all of your Custom Collections as well as your Customer Portfolios at a glance and choose to copy, move, delete, or view favorites all from within the Manage tab within Inventory Mode. This new workflow allows you to easily organize and purge outdated files and information.




## Work Anywhere

Practice or work in CounterSketch Studio from your home computer. The new license transfer feature allows you to quickly unregister your license and transfer it to another computer.

## Backup and Restore

Rest assured knowing that your CounterSketch Studio information and designs are safely backed up. This new feature prompts a backup of your portfolios, collections, quote history, and catalogs that can be restored at any time.

# Get the most out of Version 2.5

An introduction from Gemvision and Stuller

Gemvision and Stuller are deeply committed to helping you be the best CounterSketch Studio user you can be. Even though we boast how easy it is to use CounterSketch Studio, a tool is only as good as how it is being used! We offer many resources to help you along your journey with CounterSketch Studio, but your success with CounterSketch Studio is up to you and you alone.

One of the greatest challenges you will face with CounterSketch Studio and what makes it a very powerful tool is the vast number of Starting Point Inventory models and the dissimilarity of the controls found within each design. When selling jewelry from your showcase, you must be familiar with your inventory. If you don't know what you have, you can't sell it. The same concept holds true for CounterSketch Studio. To be successful you must dedicate your time and energy to understanding your Starting Point Inventory.

This is no small task, but the new features found within CounterSketch Studio 2.5 will help you. With over 2,300 models and climbing, it may seem like a daunting task to become familiar with this amount of inventory, but fear not! Use Inventory Mode and locate 10-20 Starting Point Inventory models that are similar to the top sellers within your store. Practice modifying these designs and create a Custom Collection, saving the slider's default position to display the model the way you want. Then publish the collection and even order 'brass and glass' prototypes of the models for your showcase. Now in CS Mode you can limit the search results to models you are comfortable working with in your Custom Collection. CounterSketch Studio also gives you a visual cue if this item has been ordered and is available in your showcase. That way during a design consultation you can show your customers a physical example of the model.

Over time you can add designs to your Custom Collections until you are comfortable selling with the entire CounterSketch Studio library. Before you know it, you will feel at ease with CounterSketch Studio and this new approach to selling. Let's face it, retail jewelry is evolving. When you purchased CounterSketch Studio, this alone showed your level of commitment to growing your business and providing your customer with the latest and greatest retail buying experience. So dig deep and read on to learn about all of the exciting new tools available to you within CounterSketch Studio 2.5!

Gemvision STULLER
STRATEGIC PARTNERS

Gemvision offers a variety of different approaches to training:

- Training at Gemvision, Stuller, or one of our remote locations
- Online instructor-led training
- On-demand training module

If you have any questions about classes, contact:

**Shelly Ellis**
shelly_ellis@gemvision.com
1.800.357.6272 ext. 104

## Notes and Tips

Throughout the text there are User Tips and important Notes designed to call your attention to points of interest and information you will need to know.

***NOTES:*** *Appear in a red italic font. Notes are easy to pick out if you choose to skim through the User Guide and just read these important points.*

### USER TIPS

*User tips have a purple header and gray text. It's easy to skim through the User Guide and pick them out.*

*This addendum should be viewed as supplementary to the CounterSketch Studio 2.0 User Guide and not as a stand-alone publication. We recommend viewing the complete User Guide for an in-depth view of CounterSketch Studio and how to design and sell custom jewelry using all the program's functions.*

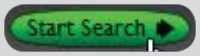
## Using the Online User Guide

The User Guide and Inventory Mode Addendum are always at hand! A printable Adobe PDF version can be found under ***Help*** in the CounterSketch Studio menu bar.

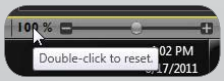
If the Adobe Acrobat Reader does not open properly, install it from the CounterSketch Studio install disk or download it online at **www.acrobat.com**.

### Here's a quick overview of a few changes you may notice when working within regular CS Mode:

- Under the Search tab, the *Go* button has now been replaced by a more obvious *Start Search* button.



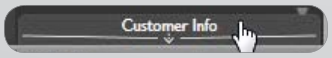

- If you have adjusted the user interface scaling and wish to have it reset to 100%, double-click on the number field next to the slider located in the bottom right-hand side of the interface.




- Under *Edit*, you now have the ability to copy and paste text fields.
- Within the Search Mode section, a new icon appears in the spot where the Browse and Catalog Views were previously located. This is the new Custom Collection Search Mode. Select this button to search your Custom Collections once they've been created.

- A new icon now lives next to the Hide/Show Designs icon. This icon houses the Browse and Catalog Views and acts as a toggle switching between the two.

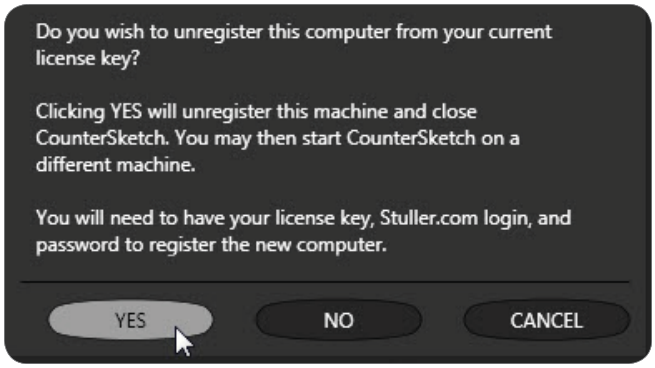
- The Customer Info pop-up menu is more noticeable and now you can select and add the client's ring size to their portfolio information.

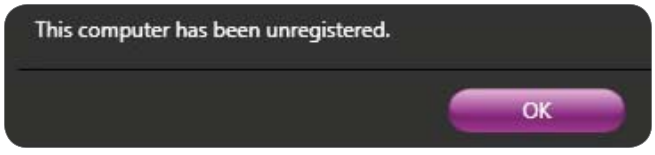



## License Transfer

Want to spend some time learning and practicing CounterSketch Studio after business hours? Need to prepare for an upcoming design consultation or want to spend some time creating a few Custom Collections and wish you could work from your home PC? Now you can transfer your CounterSketch Studio license quickly and easily from one computer to another. Follow these simple steps and walk the path to CounterSketch Studio freedom!

Install CounterSketch Studio onto the desired computer(s) using your original CounterSketch Studio 2.0 or the new 2.5 install disc. For details on the install process, see the Software Installation Instructions in the User Guide or the back of the 2.5 install disc. In order to move your license to a new machine, you will first need to unregister the old computer. To do this go to **File>Unregister Computer**. Clicking *Yes* will unregister the machine and automatically close CounterSketch Studio. Now you are ready to move your license.



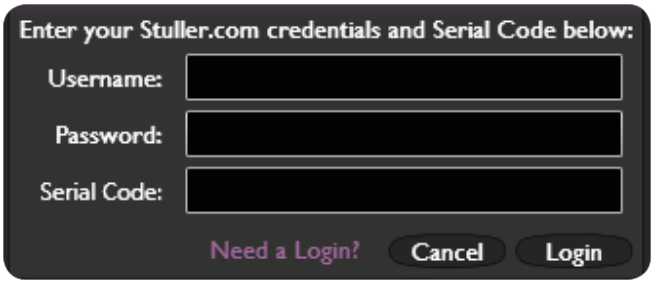

### License Transfer Checklist

- ☐ ***Original CounterSketch Studio 2.0 or 2.5 install disc***
- ☐ ***16-digit license key #***
  *Your 16-digit code appears as a sticker within the CounterSketch Studio CD case. For those users receiving 2.5 as an update, use the 16-digit code from your original install disc.*
- ☐ ***Stuller.com login***
- ☐ ***Stuller.com password***

*It is recommended that you set all CounterSketch Studio installed computers to Automatic Update (Located within the Preferences Section). This is so each machine keeps current with every CounterSketch Studio program and library update available. See the CounterSketch Studio manual for more details.*

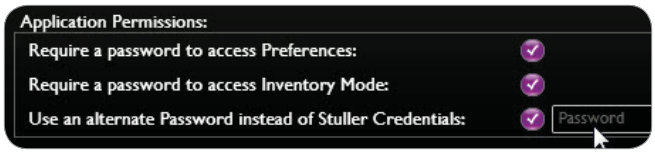
When opening CounterSketch Studio on the new computer you will receive a prompt to enter your 16-digit license key, Stuller.com login and Stuller.com password, so remember to keep this information handy. The first time you open CounterSketch Studio on the new machine you will have to set up your Account Information again including your markups. Enter your information in the appropriate fields and you're ready to go!

***NOTE:*** *Remember, CounterSketch Studio will only be usable on one computer per license at a time and will always need to be unregistered from the first computer before you are able to use it on the new machine. Don't forget to unregister before leaving work if you plan on using the program at home or vice versa!*



## Password Permissions

You now have the ability to customize the security settings to your store's personal preferences. Select **Edit>Account Info**, and you will receive a prompt to enter your Stuller.com password. Once entered, you will have access to the Account Info menu. Along the bottom of the Account Info menu, under Application Permissions, you may choose to add a prompt for a password when trying to gain access to the Preferences section and/or the Inventory Mode section of the program.




If you want to allow access to Inventory Mode and/or the Preferences menu, however you don't want to give out your Stuller account information (This is the same information you use to place orders on Stuller's website), just type a new password into the text box and it will be saved when you click ***Close***. Keep in mind, you will always use your original Stuller.com password to access the Account Info section itself as this is where proprietary markup information is stored.

## The New Backup/Restore Feature Helps You Sleep At Night

In the event you have hard drive failure or your CounterSketch Studio computer needs to go into the shop, you can restore your CounterSketch Studio files onto another computer and get up and running with CounterSketch Studio in no time with no loss of data by creating a copy or backup of CounterSketch Studio. Digital storage space is cheap in comparison to the countless hours you've spent during design consultations, creating Custom Collections and catalogs. Give yourself peace of mind and get in the habit of creating regular backups.

***NOTE:*** *Performing a backup or a Quick Backup can take 8-10 minutes or longer depending on your computer's processor speed. Plan ahead and perform them when your computer is not in use.*

The Backup feature will save your Quote History, Catalog History, Preferences, Custom Collections, and Customer Portfolios (Including your customer's personal information) – Basically everything of importance that you need.

To perform a manual backup, go to **Edit>Preferences**. Depending on your Account Info settings, you may be prompted to enter your password. In the Preferences menu, click on the new Backup & Restore tab.

Specify where you would like to store the backup file within the Backup Directory Location text field by clicking ***Browse***. Be sure to save to an external location instead of your hard drive. Select the folder you wish to save your data in, or click ***Make New Folder*** to create a new one. Name the new folder and click ***OK***. Next, click on ***Create Backup***. Underneath the Backup Log, CounterSketch Studio will fill you in on what's happening during the process. This backup information takes up a lot of hard drive space. We advise that you only keep the most recent two or three backups and delete the rest in order to save space on your computer. Wait until the backup is complete before you begin working and saving projects again, as this information may be lost during the process.

In the future, simply click ***Create Backup*** and CounterSketch Studio will automatically send the data to this location. At any time you may change the destination by clicking ***Browse*** again and specifying a new location or folder.

## Quick Backup

Quick Backup is just another way to access the Backup feature. Access it quickly and easily by going to **File>Quick Backup**. The backup will automatically be saved to your predefined location.

## Restore

Located below the Backup feature lives the new Restore feature. Click ***Browse*** to navigate to the folder where you previously created your CounterSketch Studio data backup. Once selected, click ***Restore***. As an added safety net, CounterSketch Studio will ask you if you want to perform a backup of the current CounterSketch Studio before performing the restore.

***IMPORTANT:*** *Using the Restore feature to restore from a previous backup point can potentially DELETE projects that were created after the date of the restored backup. Please use caution and only use restore when absolutely necessary. Please be advised, the restore process may take a long time depending on the size and amount of portfolios being restored.*

## Import/Export

In the event you contact Technical Support and need to send them a file or you need to load a file into CounterSketch Studio that was sent to you, use the Import/Export feature. Located within the File drop-down menu, hover your curser over the Import/Export option to activate the flyout menu. Here you can choose to either import or export a file.

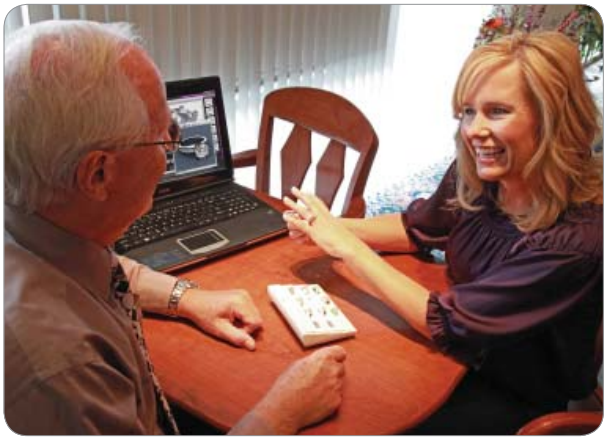
Use Import to load a .csg file into CounterSketch Studio by clicking ***Import***. Browse to the location on your computer where the file is saved and click ***Open***. Take note, importing a file will override any file that is currently active on the SketchPad. If you wish to save this file, make sure to Job Bag the active design prior to using the Import function.

Any design that is currently loaded onto the SketchPad can be exported and saved to your computer. To do so, choose the Export option. A new window will appear. Navigate to the location on your computer where you would like to store the file. In the File Name text box enter the desired name and click ***Save***. The file is now saved to the location you choose with a .csg file extension.

## CS Prototype Packages

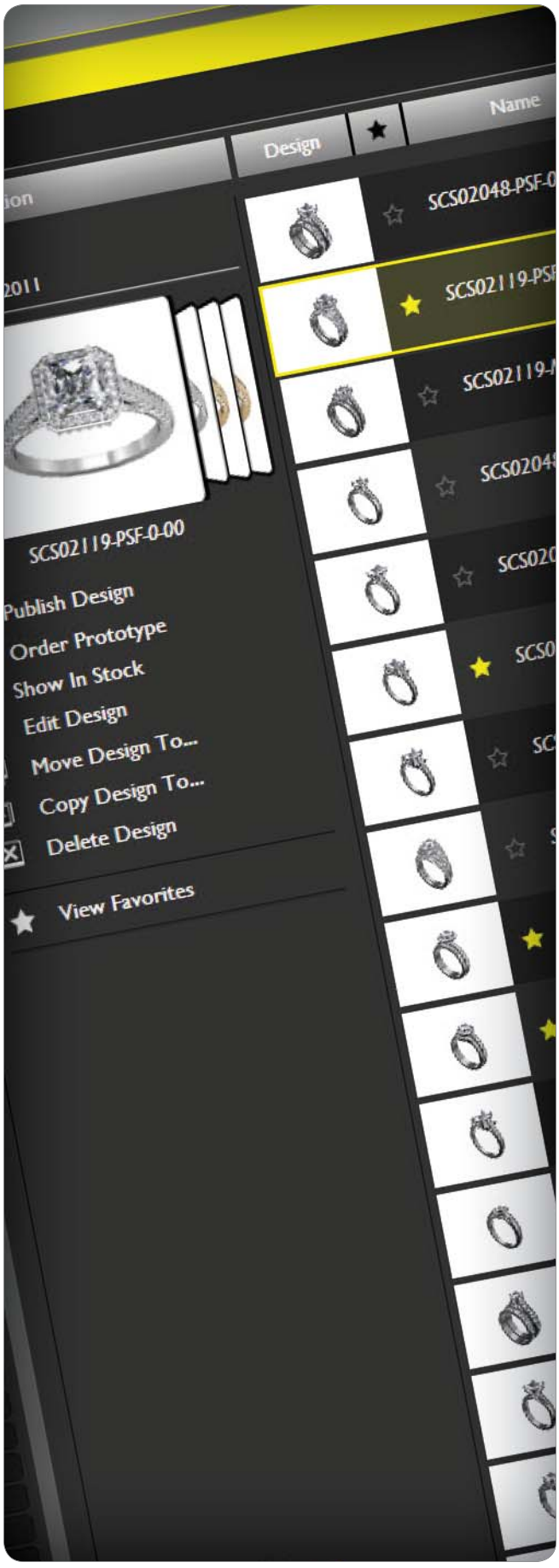
If you're a new CounterSketch Studio user, you may have purchased one of the four Starter Packages which include pre-selected prototypes. If you are an existing user, you received the Original CS Sample Kit. To help you get started with Inventory Mode, all of the models from the kits and packages have automatically been downloaded into the Custom Collection section and currently appear as; CS Package 1, CS Package 2, CS Package 3, CS Standard Package, and Original CS Sample Kit.

Identify which package level you have within your store and mark the items In Stock that you own. These items have already been published so they are automatically searchable in CS Mode. Some package levels include the purchase of customized prototypes. Be sure to order your customized prototypes, and once received, mark them as In Stock to indicate that they exist in your showcase. *Learn more about the Show In Stock feature later in this addendum.* Peruse these collections if you are interested in purchasing one of the CS Prototype packages. The models included within these packages represent current fashion trends and the individual stock prototypes within these packages are discounted heavily when purchased in their grouping. If you wish to purchase individual altered models, pricing starts at $150 but will vary in cost depending on model complexities. Contact Stuller for official pricing.



### Import Stuller Packages Button

If you delete, rename, or alter these collections in any way, you may download another copy of all five by clicking ***Import Stuller Packages***. Download as many copies as you wish at any time.




# How to Use
# Inventory Mode

Manage Your Digital Inventory

*With CounterSketch Studio and Inventory Mode you can:*

- *Optimize a Search*
- *Create Custom Collections*
- *Manage your portfolios*
- *Order customized prototypes that will exist only in your store!*
- *Host custom design consultations*
- *Price a custom job with the click of a button*
- *Show a client how an item will look when being worn*
- *Generate beautiful photorealistic renders*
- *Manage your digital inventory*
- *Build custom-print catalogs*
- *Specify manufacturing details and order your unique designs directly from Stuller*
- *Satisfy your customer with quick turnaround times*

**Never before in the history of retail jewelry has it been possible to do all of this from the comfort of your jewelry store's counter top – until now!**

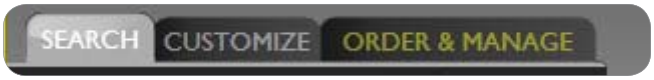
## A new way of business...

Introducing CounterSketch Studio 2.5 and the addition of Inventory Mode! Manage your virtual inventory with ease while you and your staff create custom lines of jewelry and prototypes exclusive to your store. Search the entire CounterSketch Studio library or choose to limit a search to your own Custom Collections.

Further differentiate yourself from your competition with this revolutionary upgrade to CounterSketch Studio. Create your own unique Custom Collections and easily publish them. Your designs will then be displayed in up to 576 metal and gemstone color combinations, making each custom design within the collection searchable to your clients specifications. Open any model within your Custom Collection and further customize the design to match your client's vision right before their eyes. These designs will be saved on your computer alone, and will be exclusive to your store!

# Getting Started in Inventory Mode

To switch over to the Inventory Mode section of CounterSketch Studio, click on ***CS Mode*** located along the top right-hand corner of the interface and select the ***Inventory*** option from the drop-down that appears. Unless you've changed your password protection settings within **Edit>Account Info,** you will receive a prompt to enter your password.




Notice that the entire interface becomes trimmed in yellow. This color change acts as a visual cue that you are working within this new area of the program. You will also notice the program automatically rolls you over to the new Order & Manage tab. Before we talk in detail about this area of the program you will need to find, alter and save some designs to manage - so let's perform a general search.

## Perform a Search

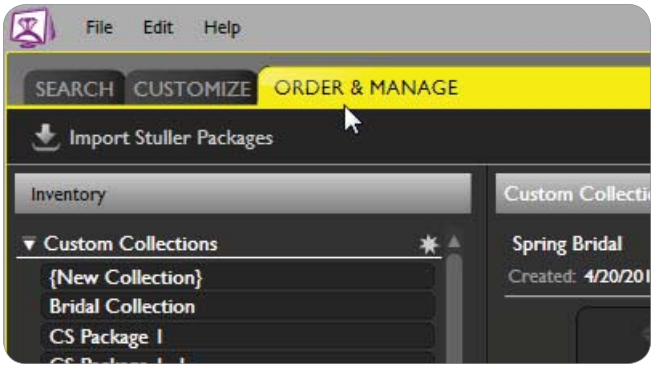
Along with the new Order & Manage tab, when in Inventory Mode, you still have access to all of the standard action tabs including Search and Customize. To get started, click on the Search tab and perform a simple search of the CounterSketch Studio library of models. Select your search criteria such as metal, stone color, stone shape, etc., and click on the green ***Start Search*** button at the bottom of the menu. CounterSketch Studio will pull up models that fall within these specifications. Double-click on a selected model to load it onto the SketchPad and customize the design to your satisfaction using the sliders and functionality available for that item.

Ready for your customized design to become searchable as a Starting Point model? Maybe even as a custom-designed 'brass and glass' prototype for your store? When you're satisfied with the design's new look and ready for it to be a part of your Custom Collections, you will need to save the model by adding it to a Job Bag just as you would in regular CS Mode. Simply click on the plus sign located directly below the Job Bag's thumbnail to capture and save the design.

Think of Inventory Mode, think yellow and management - not customers! This color-coding is designed to help you distinguish the two modes from one another so that you don't begin working and saving in the wrong mode by mistake.

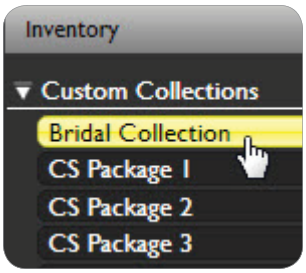
You will also need to name your new Custom Collection by double-clicking on the title's text field. When it becomes highlighted, type in the desired name. Be creative – this information will transfer to CS Mode where you will search in front of your customers. Press ***Enter*** on the keyboard to save. If you wish, you may also name or add a note to the individual Job Bag itself by typing into the text field located along the bottom right-hand side of the Job Bag.

Once you've saved a few designs within a Custom Collection to work with in the Manage section, you're ready to click on the Order & Manage tab.



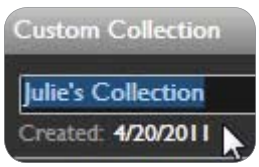

On the left side of the screen under the grey Inventory title bar, your entire saved inventory is divided into two main categories. These sections appear as Custom Collections and Customer Portfolios. These two sections are collapsible by clicking on the arrows located to the left of the headers. Click the arrows a second time to reopen them. Underneath Custom Collections live the other sub-categories – Published Designs, Ordered Samples and In Stock Samples. These sections will be explained in detail later in this addendum. First, it's important to understand the differences between these two main sections:

| Custom Collections | VS | Customer Portfolios |
|---|---|---|
| Created in Inventory Mode | | Created in CS Mode |
| Created by staff for your store's personal inventory | | Created during a design consultation with a customer |
| Job Bag only finalized designs | | Job Bag often to create a history of the design consultation |
| Can be published to become searchable | | Can't be published unless moved to a Custom Collection |
| Searchable in CS Mode as an SPI model | | Only found within portfolio (not searchable as an SPI) |




## Custom Collections

Click on the title of the Custom Collection of your choice to activate it. You will notice that the Custom Collections bar will become highlighted in yellow. The Custom Collection and a breakdown of all it's models and their corresponding information will appear in the center of the screen. Use the scroll bar on the right or the wheel on the mouse to scroll through your Custom Collection if it contains a lot of designs and is not viewable all at once. Click anywhere on an individual design's information line to select it.

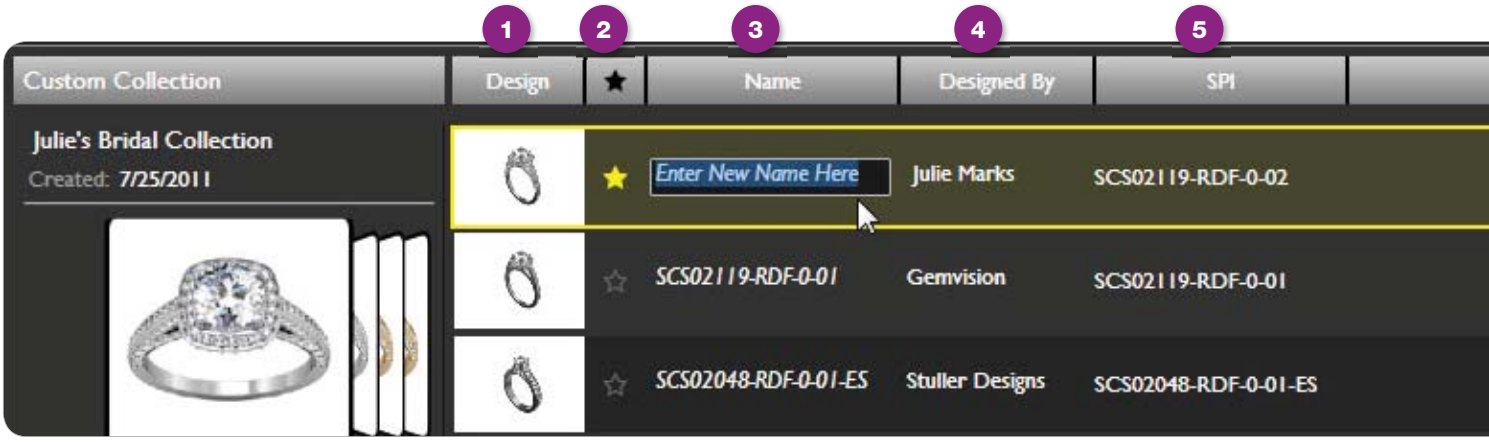



The name of each collection and the date it was created will appear in the top left-hand corner of each individual collection. If you wish to rename a collection, simply double-click on its title and the name will appear highlighted in blue. Type the new name into the field and hit ***Enter*** when done. The new title will be saved accordingly.

### Job Bagging Tips

*Although you are not limited to the amount of Custom Collections you may create nor the amount of items you may have within each Custom Collection, when you are in Inventory Mode it's best to only Job Bag final designs to keep things simple and organized.*

*In CS Mode the opposite is recommended. Switch to a "more Job Bagging the better" philosophy. As you are working with a client it is very important to save even slight variations of a design. If your customer decides they liked the design created a few modifications back versus the direction the consultation may be currently heading, you can quickly pull up that saved model.*




## Below is a breakdown of the information within the columns of each Custom Collection:

1 **Design:** The thumbnail image of the model composed as it was saved in its Job Bag within the Customize tab appears here.

2 **Favorites:** The star image here corresponds to the Favorites ability within CounterSketch Studio to view multiple designs simultaneously. *This is discussed further under View Favorites.*

3 **Name:** The original SPI model number will automatically appear here. If you like, you may change this by clicking in the field and typing a new name or description into the text box. Click anywhere outside of the field to save the information.

4 **Designed by:** In this section it automatically states the designer who created the original SPI. You have the option to insert your name here and take ownership over the new customized design.

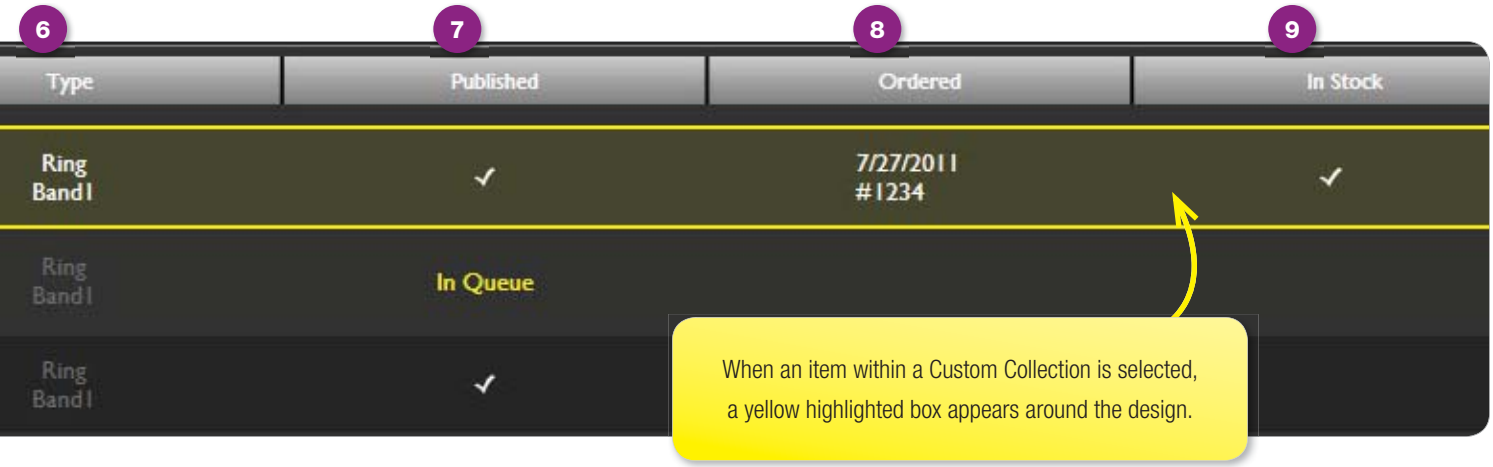
5 **SPI:** The original Starting Point Inventory number of the design appears in this section. This makes the model easily trackable if you wish to revisit the original model within Search.

6 **Type:** This description corresponds to the primary search criteria under CS Mode. If any additional components are available for the specific design they will appear here *(e.g. A ring and its accompanying bands)*.

Underneath the Custom Collection title bar you will notice a larger thumbnail image appears, corresponding to the design. If the item has not been published, a generic ring graphic will appear here with the text "Not Published" displayed. If published, rendered designs are arrayed in every metal combination available for that design. Click through them with the mouse to view each thumbnail. If any information was entered into the Job Bag's text field while in the Customize tab, it will appear below the image.

## Create New

If you are working within Inventory Mode's Order & Manage tab and you wish to create an entirely new Custom Collection, click the star-shaped ***Create New*** icon located to the left on the title bar. A text box appears prompting you to name the new item. Enter a name inside the text box and click ***Apply***. The new portfolio/collection is now listed.

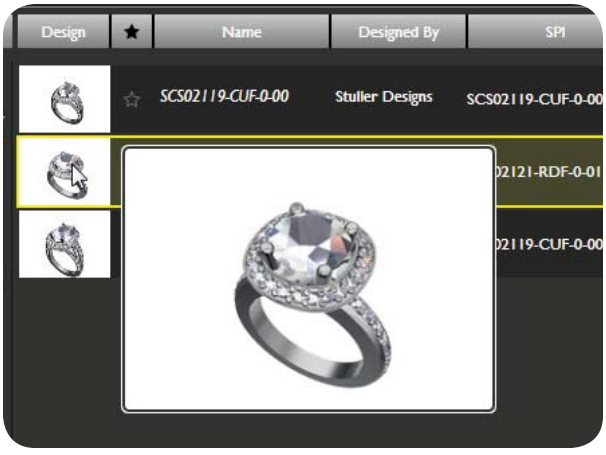



**7** **Published:** Published means the item has been rendered in every metal and gemstone combination possible. Once an item is published, a check mark will appear here indicating it is now searchable as a Starting Point model. If the design has been moved to the Publish Queue and is waiting to begin publishing, it will state "In Queue" here. *Visit the Publish Design section of this addendum for more info.*

**8** **Ordered:** If the design has been ordered as a 'brass and glass' prototype, the date in which the order was placed will appear here along with a 4-digit reference number.

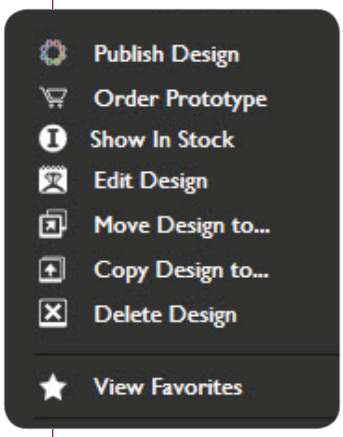
**9** **In Stock:** Use this feature to help track and manage which items you ordered and currently have in your store as 'brass and glass' prototypes. *See the Show In Stock section for more information on In Stock management.*

## Want to take a closer look?



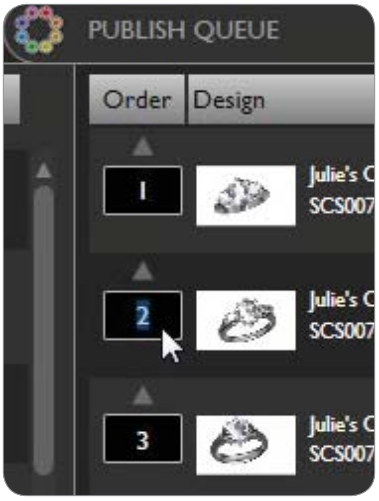

**Quick View:** Just need to take a quick look at the model instead? Simply hover your mouse over the thumbnail of the selected design to display a larger thumbnail image.

**Live Preview:** Rotate, zoom, and view your design from all angles by double-clicking on the selected model's thumbnail. To rotate the model, hold down the right mouse button. To zoom in and out, roll the mouse's wheel. Live Preview behaves in the same manner as does moving an item on the SketchPad and is a helpful tool, which allows you to revisit a design up close when managing your inventory.



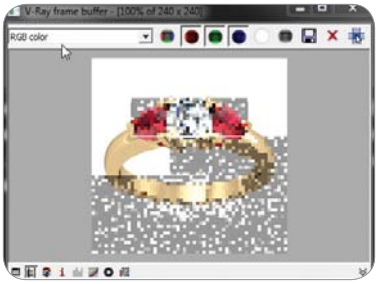

# Publish Design

Once you've customized a collection of designs that you are pleased with and saved them under Custom Collections, you will need to publish them so they become searchable within CounterSketch Studio as a Starting Point Inventory model. Publishing will render the design in every metal and gemstone combination available within CounterSketch Studio. This is to make sure the item will appear no matter what specific metal or gemstone color combination your client may decide they're looking for.




To get started, select an item and click on ***Publish Design***. This will transfer the design into the Publish Queue that will appear along the right-hand side of the interface. The numbers to the left of the thumbnail image correspond to the order in which they will be published. If you wish to change this order, swipe over the number(s) you wish to change to highlight them in blue. Type in the new number and click outside of the field to save. The numerical order will update accordingly. You may rearrange them as many times as you wish before you begin publishing.

If you decide that you want to delete a design from the Publishing Queue, simply click on the "*X*" to the right of the model's information. CounterSketch Studio will ask if you do in fact, wish to remove the design. If you wish to remove all items in the Publish Queue, click ***Clear All***. Deleting a design from the queue does not delete the item from the Collection. Remember however, that a design is not searchable in CS Mode until after it is published.



When you are done selecting designs and are ready to publish, click the ***Start*** button located in the top right corner of the queue. A dialog box will appear announcing that the publishing process has begun. Sometimes it can take a moment for the V-Ray Publishing Window to appear, so keep this in mind. If at any time you wish to stop the process hit ***Cancel***.

***NOTE:*** *Keep in mind that publishing renders each model in up to 576 metal and gemstone combinations. Although it's up to you, it's best to begin the publishing process at the end of the day. Depending on the number of items you have in the queue, publishing can take awhile. We strongly recommend hitting the Start button when you begin closing up shop. That way, the process will be complete when you arrive in the morning and your computer is never tied up when you need CounterSketch Studio for a design consultation with a customer.*

## USER TIP

*If you want to view all your published models at one time, click on the Published Designs section under Custom Collections located along the left-hand side of the interface to view them in a list.*

## Search For Designs in Your New Custom Collection

Congratulations! After your designs are successfully published, you can search for your custom designs during a design consultation within CS Mode. Click on the ***Custom Collections Search Mode*** icon when in the Search tab during a design consultation with a client. This will limit the search to only your published models. You have the added control to narrow your search down even further by clicking on the ***Custom Collections*** drop-down menu and selecting an individual collection. All of the Custom Collections you've named will appear in any metal or gemstone combination your customer is requesting.

## Order Prototype

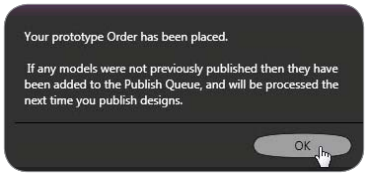
Another exciting feature within Inventory Mode allows you to take the Custom Collection models you've created and have these personalized designs manufactured into one-of-a-kind 'brass and glass' kit prototypes for your store's physical inventory. Prices starting at $150 allow you to keep your store's inventory up to date with the latest styling at a fraction of the cost.

With the item highlighted, click on ***Order Prototype*** to pull up the Mounting Sample metal and gem-stone color menu.

Select the Primary and Secondary Metal Color as the same color if you desire the piece to appear in one metal color only, or if you prefer a two-tone look, select different metal colors for different portions of the design. You will have the option of selecting the Center Gem Color, Side Gem Color, as well as the Accent Gem Color where applicable. Stuller offers you a variety of imitation gemstones to choose from.

***NOTE:*** *Primary Metal corresponds to the shank of a ring or the largest part of a design, while Secondary Metal corresponds to the smaller design element such as the setting. If in doubt, Render the item from within the Customize tab to determine which elements are Primary and Secondary.*

Once you've selected your metal and gemstone choice(s), click ***Order***. The program will tell you, "Please wait…" while it sends this order to Stuller. You should then receive the final phrase "Your prototype Order has been placed". Make sure to watch for this message. If you do not receive it, there may be an issue with your internet connection and your order was not received by Stuller! Click ***Cancel*** before placing the order to close the Order menu and void the selections made.



The Job Bag of the design is no longer overwritable once a design is ordered. When in the Customize tab, this is represented by a small yellow icon of a padlock appearing in the bottom right-hand corner of the Job Bag.

### Prototype Order Policy

All customized prototypes are alloy samples set with Cubic Zirconia and a heavy plating of gold and/or rhodium over a nickel plated base. Because of the individual nature of these models, it may take up to three weeks to receive the model from the time you've placed the order. Track your order through Stuller just as you would any CounterSketch Studio precious metal jewelry item, referencing the 4-digit code created when the order was placed. *See the CounterSketch Studio manual for details about order tracking.*

## USER TIP

*View all of your ordered prototypes simultaneously by clicking on Ordered Samples located under the Custom Collections header on the left-hand corner of the interface. Use this sub-category to track and manage your physical prototypes and to help utilize the Show In Stock feature explained below.*

## Show In Stock

With the Show In Stock feature, you have the ability to keep track of the items you have ordered and have in stock as physical prototypes. To mark an item as In Stock, select the item and click on ***Show In Stock***. A check mark will immediately appear on the item's line of information under the In Stock column. Remove an item from stock by clicking the ***Remove*** option that appears.

## USER TIP

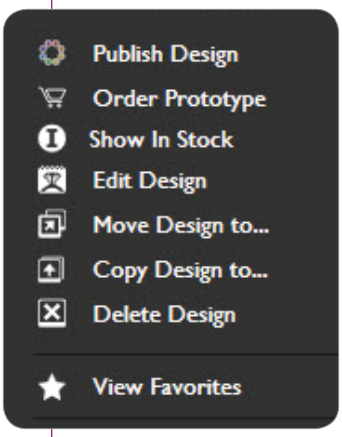
*Quickly view and manage your In Stock items simultaneously by clicking In Stock Samples under the Inventory header.*

*To keep things simple and organized, officially assign the task of managing your In Stock items to a member of your staff. When your prototype order comes in, have it be their job to manage marking within Inventory mode which items are now in your showcase.*

Once an item is selected as In Stock, a green icon will show next to the design when searching under that specific collection, notifying you that you own this specific prototype. That way you can reference it during a consultation with a client.

## Edit Design

If you wish to do further alterations to a design, click ***Edit Design*** to open the item onto the SketchPad. After you're done altering the design, you will need to save the new edited version. Select a portfolio from the drop-down or create a new portfolio if desired. If this new altered design is meant to replace the previous design from which it came, to keep things simple we suggest saving over the old design's Job Bag instead of to a new one. This is not possible however, if the previous design has been published. In this case, simply save the revised model in a new Job Bag.




## Move Design to...

If you wish to move an individual design to another collection or portfolio, select it and click on ***Move Design to...*** Choose the collection or portfolio you wish to move the design to from the drop-down menu that appears.

## Copy Design to...

Click on ***Copy Design to...*** in order to create a copy of the design selected. Choose the portfolio or collection you wish to move the copy to from the drop-down menu.

## Delete Design

Click on ***Delete Design*** to remove the model from the collection. You will receive a prompt asking if you do indeed wish to remove the design from the current project. If you choose to delete the design, this item will be permanently deleted from the Custom Collection, however it will still be searchable as an unedited SPI model within the program.

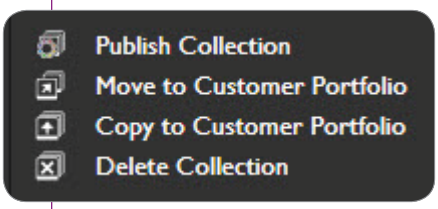
***NOTE:*** *Although the original SPI will still remain searchable within CounterSketch Studio, deleting an altered model or collection from the Manage section will permanently delete this specific information from your computer. Make sure you're ready to say goodbye!*

USER TIP

*Click on the star next to a design to turn it yellow and mark it as a favorite.*

## View Favorites

***View Favorites*** will allow you to view all starred designs within the same collection simultaneously. Use this method to verify that the collection is cohesive and just the way you want it. Within the Customize tab, verify that the item has been marked as a favorite. Simply click on the thumbnails at the bottom of the Favorites screen to view the designs and click on them a second time to deselect them. *Visit the CounterSketch Studio 2.0 manual for more information.*

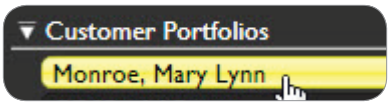


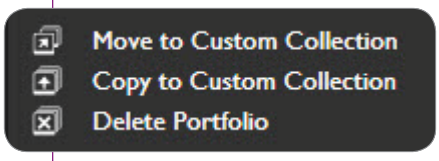

If you wish to perform the same function to an entire collection, choose from Publish Collection, Move to Customer Portfolio, Copy to Customer Portfolio and Delete Collection, located underneath the Custom Collection title bar at the bottom of the screen. These universal features help you save time when managing your digital inventory.

For example, when you wish to publish an entire collection, instead of adding each individual model to the Publish Queue one at a time, simply click ***Publish Collection*** and all models within the collection will be added simultaneously.

# Customer Portfolios

Within the Order & Manage tab, Customer Portfolios are displayed in the same way and have the same features and functionality that Custom Collections do, the only exception being the inability to publish or order prototypes of designs that are from the Customer Portfolios section. *See the Custom Collections vs. Customer Portfolios comparison box.* Copy or move the individual item or entire portfolio to the Custom Collection section in order to perform these functions.




You have the ability to move, copy and delete an entire Customer Portfolio with one click. If you choose the Move to Custom Collection option, the entire portfolio will be removed from the Customer Portfolio section of the program and will appear within Customer Collections. This feature is ideal if you have previously created and used portfolios for demonstrating CounterSketch Studio that do not relate to a specific customer. Maybe you or staff members have created demographic portfolios such as Bridal or Remount. Now with the addition of Inventory Mode, these portfolios may be better suited within the Custom Collections section of the program where they will become searchable as a collection.

## For Additional Help Using CounterSketch Studio 2.5

It's hard to believe that CounterSketch Studio released less than a year and a half ago and we are already on to Version 2.5. Whether you are a new user or have been around since the birth of CounterSketch Studio, we are very pleased that you decided to join us on this exciting journey. If you have any additional questions on how to use the new tools explained in this User Guide Addendum, please visit the CounterSketch Studio User Forum and view the tutorial movies and training materials. As always, happy clicking!

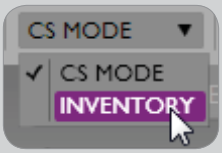
TUTORIAL

# Using Inventory Mode

Learn the fundamentals to design, publish and order a Custom Collection of jewelry, and search your Custom Collections.

Use Inventory Mode to manage and create your own customized SPI. Once each design is perfected by you, publish the item, making it searchable in CS Mode. Publish will render the design in up to 576 different metal and gemstone combinations. Take it one step further and order your customized prototype right from the CounterSketch Studio interface. During your next design consultation, search your exclusive Custom Collections and display them within CounterSketch Studio exactly the way you want. Help your customer visualize the design with custom 'brass and glass' prototypes which you can also order right from within the CounterSketch Studio interface.

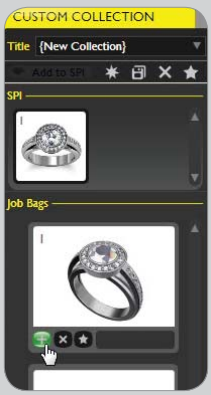
## 1 Inventory Mode




In the upper right-hand corner of the CounterSketch Studio interface, click on CS Mode and select Inventory Mode. Depending on your preferences under **Edit > Account Info**, you may be required to enter a password to access the tools within this section of the program. Once in Inventory Mode, the entire interface will be trimmed in yellow. The color change serves as a visual cue that you are now working within this new area of the program.

## 2 Search and Customize

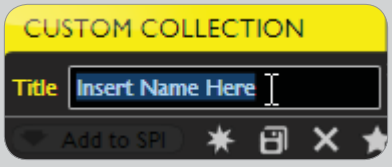
Use the standard arsenal of tools to search and customize a collection of like items. Save as many designs as you would wish in your collection within the Custom Collection's Job Bag column.




Within Inventory Mode, the best practice while designing a collection is to save only finalized designs to a Job Bag as opposed to CS Mode where you are encouraged to "storyboard" or save each step-by-step change during the consultation.

## 3 Name the Collection

Click the text box next to the Title field under Custom Collection and name your new Custom Collection. Be creative – this information will transfer to CS Mode where you will search in front of your customers.

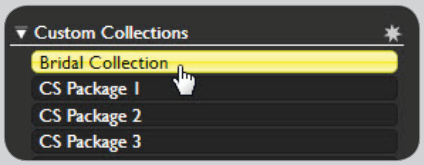



## 4 Order & Manage

Click the Manage tab to view your Custom Collections and Customer Portfolios at a glance, in list form along the left-hand side of the screen. You can manage all of your CounterSketch Studio designs within this tab, however for the purposes of this tutorial we will focus on making your Custom Collection searchable in CS Mode and demonstrate how to order prototypes.

## 5 Custom Collections

Click Custom Collections under the Inventory title bar along the left-hand side of the interface. Use the scroll bar to peruse all Custom Collections and locate the collection created in Steps 1-3.



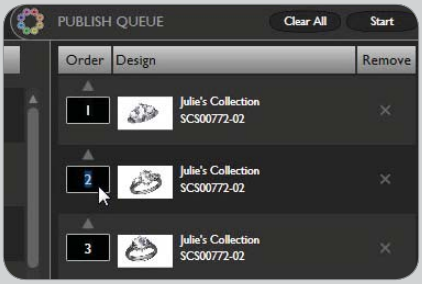

## 6 Make a Design Searchable

Each Job Bag within the collection is represented by a thumbnail image. To make these items searchable, click Publish Selected.

## 7 Publish Queue

The items you select to publish are then transferred to the Publish Queue located on the right-hand side

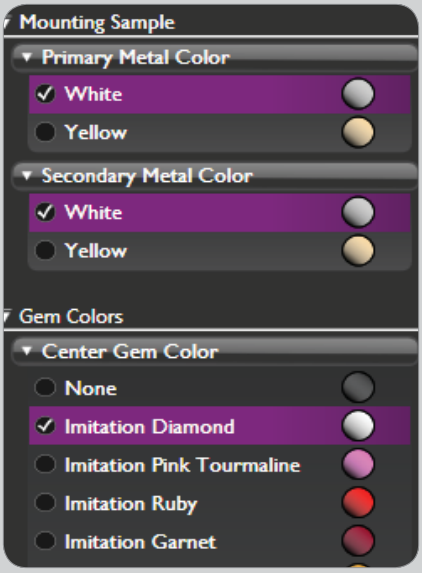
of the interface. To become searchable each design must first be published, or rendered in every metal and gemstone combination applicable for that model. This process will take time and during this process you will not be able to work within CounterSketch Studio. It is recommended to wait until the end of the day and publish the items overnight. To begin this process click Start. When complete, a small check mark will display under the Publish column within the Order & Manage tab. When you return to CS Mode, your item will now be searchable as a customized SPI model.




## 8 Order Prototypes

Order any customized design as a 'brass and glass' prototype from within Inventory Mode's Order & Manage tab. Select the model and click Order Selected.

The Mounting Sample order menu will appear. Choose the Primary and Secondary Metal colors as well as the Center, Side and Accent Gem colors. Click Order to proceed. A dialog box will appear reporting that the order has




been placed. In the event you have not already published the ordered items, they will automatically be added to the Publish Queue. CounterSketch Studio assumes you would like to make these exclusive customized prototypes searchable as Starting Point Inventory within CS Mode.

## 9 Mark as In Stock

Once your store receives the ordered prototypes, return to the Order & Manage section of

the program and click Show In Stock next to each corresponding model.

## 10 Search Custom Collections

Return to CS Mode. Located within the Search tab, choose from the options to search the entire CounterSketch Studio Library or choose to narrow the search to your Custom Collections by selecting the Custom Collections icon. Search all of your Custom Collections or filter the search criteria and confine it to a specific collection by selecting it from the drop down menu. Specify the metal type, center stone and side gem colors. Click Start Search. Viola! You and your customers can now view your exclusive line of jewelry the way you want it to appear!

When searching within a specific collection in which you've marked items that are in stock, a small green icon will appear next to the model for easy identification.

## Still have questions?

Visit the CounterSketch Studio User Forum to connect online with Gemvision staff and other users and to share information and resources. Access tutorials, tips, news, and up-to-the-minute announcements direct from Gemvision!
www.countersketchstudio.com/forum

Maximize your investment in CounterSketch Studio by promoting your custom design capabilities through the Consumer Marketing Program!
www.gemvisionadvertising.com/css

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