CUSTOM RESELLER INVENTORY & WORKFLOW SYSTEM

Illustrative Client Sample

Harbor Lane Vintage & Resale

This sample uses a fictional business and fictional data. It demonstrates the structure and level of customization a client may receive; the actual system is built around each client's operation.

Sample deliverables shown: diagnosis • system design • workbook architecture • workflow rules • implementation plan

1. Executive Diagnosis

Harbor Lane Vintage & Resale is a fictional one-person resale business selling mostly one-of-one vintage home goods, books, ephemera, and small collectibles through eBay and occasional local markets. The owner can usually locate listed inventory, but unlisted merchandise and aging stock are difficult to see at a glance.

Finding	Evidence	Design Decision
What is working	Numbered storage bins make sold-item retrieval reliable.	Preserve the existing location method.
Primary bottleneck	New purchases accumulate before photography and listing.	Track pre-listing inventory by batch, not item-by-item.
Cost tracking	Bulk purchases make exact item-level cost allocation burdensome.	Track source-lot cost and estimate unit cost only after quality control.
Aging inventory	Older listings have no consistent review process.	Create aging bands tied to specific actions.
System risk	Previous spreadsheets required too much maintenance.	Keep required manual fields minimal and automate derived fields.

System objective: Create a low-maintenance inventory operating system that shows where merchandise is in the workflow, where listed items are stored, which inventory needs attention, and what happened when an item left active inventory.

2. What Should Not Change

- Do not replace a storage system that already allows reliable picking.
- Do not require detailed records for every unlisted object before photography.
- Do not force exact historical acquisition cost onto every item in a bulk purchase.
- Do not build accounting or tax functionality into an operational inventory system.

3. Customized Workbook Architecture

The workbook is modular. Only the pieces that solve this client's operating problems are included.

Module	Purpose
Action Center	Highlights work requiring attention now rather than presenting decorative charts.
Inventory Master	Holds durable item identity, marketplace reference, status, location, and aging information.
Acquisition Lots	Tracks auction/estate/source-level spend without forcing false precision.
Unlisted Batches	Makes backlog visible while avoiding item-by-item entry before photography.
Aging Review	Turns listing age into a prioritized decision queue.
Disposition Log	Records eBay sales, flea-market outcomes, donations, discards, and relisting events.
Locations & Settings	Stores controlled dropdown values, aging rules, and storage conventions.

4. Sample Action Center

Example only - these figures are fictional and would be driven by the client's workbook.

842 Active listings	**14** Unlisted batches	**286** Approx. items waiting
117 2+ year listings	**46** Items needing stale review	**8** Items out to local market

5. Sample Inventory Identity & Location Rules

Permanent item identity should remain separate from physical location. A location can change; the internal inventory ID should not.

Inventory ID	eBay Item ID	Storage Location	Status
HL-0038-014	123456789012	B12	Active Listed
HL-0040-006	123456789055	E04.117	Active Listed
HL-0041-002	—	Photo Area	Needs Photography

6. Acquisition-Lot Cost Method

For bulk purchases, the operational objective is to create a useful estimate without turning inventory management into an accounting project.

Example: A source lot costs $180 plus $27 in buyer premium and fees. After cleaning and quality control, 46 items remain suitable for resale. The system records total lot cost of $207 and an estimated acquisition cost of $4.50 per quality-passed item.

This is an operational estimate for inventory management. It is not presented as authoritative tax COGS or bookkeeping treatment.

7. Workflow SOP - From Acquisition to Sale

Step	Action	Rule
1	**Create the source lot**	Record where the merchandise came from and the total acquisition cost.
2	**Create one or more batches**	Group unlisted inventory by auction, tote, category, or another useful processing unit.
3	**Process and quality-check**	Count only merchandise that survives cleaning/testing and remains saleable.
4	**Move to photography**	Change the batch stage instead of creating detailed records for every object.
5	**Create item record at listing readiness**	Assign a permanent internal ID, storage location, and marketplace reference.
6	**Review aging inventory**	Use the aging queue for price, listing, promotion, bundling, channel, or liquidation decisions.
7	**Record final disposition**	Preserve whether the item sold online, sold locally, returned to stock, was donated, or was discarded.

8. Local-Market / Flea-Market Flow

1. End the online listing before the item leaves for the market.
2. Change the internal status to Local Market - Out while keeping the same inventory ID.
3. After the event, record Sold Locally, Returned - Needs Relist, Donated, Discarded, Bulk Sold, or Other.
4. If it returns, relist it and update the marketplace item ID without creating a new internal identity.

9. Aging Rules & Decision Logic

Age is a review signal, not an automatic liquidation order. Thresholds are configured to the client and can be tightened after the oldest backlog is under control.

Age	Classification	Default Action
0-365 days	Normal	Leave alone unless another issue exists.
366-730	Aging	Monitor and consider a listing or price check.
731-1,095	Stale	Review title, item specifics, photos, price, offers, and promotion.
1,096+	Critical stale	Make an active disposition decision: revise, bundle, move channel, clearance, donate, or discard.

Important safeguard: Recent sales evidence should override an age-only liquidation recommendation. An old listing that still sells is not automatically dead stock.

10. 30-Day Implementation Plan

Period	Implementation Focus
Week 1	Set up source lots, storage locations, statuses, and begin using the system for all new acquisitions.
Week 2	Track unlisted batches through cleaning, photography, and listing. Adjust any fields that create unnecessary work.
Week 3	Begin gradual migration of legacy inventory only as listings are touched, revised, relisted, or physically moved.
Week 4	Work the oldest inventory review queue and confirm that the system is helping prioritize action rather than creating administration.

11. What the Paid Client Receives

- Customized Excel inventory & workflow workbook
- Client-specific operating guide/SOP
- Current-system diagnosis and recommendations
- SKU/location and lifecycle design where needed
- Aging and disposition rules
- Implementation/migration plan
- Testing with up to 25 representative records
- One revision within the original project scope

This sample is intentionally abbreviated. Actual client deliverables are built from the buyer's intake, files, inventory, workflow, storage system, and operating problems rather than from a fixed template.