Vitrine.

Onboarding & User Guide

Everything you need to run your museum, *online*.

A complete, step-by-step walkthrough of Vitrine — from creating your account to cataloguing objects, publishing your public website, selling event tickets, managing staff, and meeting collections-documentation standards.

The all-in-one Collection Management System
for museums & heritage collections of every size

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vitrinecms.com

Contents

This guide is a concise, task-oriented reference. Each chapter pairs numbered how-to steps with an annotated diagram of the real interface.

Chapter 1

Orientation

What Vitrine is, and how the dashboard is laid out.

Vitrine is an all-in-one Collection Management System (CMS) and public platform for museums and heritage collections of every size. It joins three jobs that usually need three separate tools — cataloguing your collection, running your website, and selling event tickets — into one place. No technical knowledge is required.

The six things Vitrine does

⬡

Collection

A rich catalogue record for every object — metadata, photos, documents, status, provenance, conservation and rights.

◉

Public website

A fast, searchable, mobile-ready site at `yourslug.vitrine.app`, live from day one.

◫

Site Builder

Logo, colours, templates, homepage text, About & Visit pages — no code, no designer.

▦

Analytics

First-party visitor stats: page views, top objects and traffic sources. No cookie banner.

★

Ticketing

Create events, set capacity and take bookings (free or paid via Stripe) on your own site.

◆

Compliance

Track documentation across the collection with a live, Spectrum-aligned score.

The dashboard at a glance

When you sign in you land on the dashboard. The left sidebar is your main navigation; the main panel shows a live summary of your collection and the full objects list. The exact sidebar items you see depend on your plan.

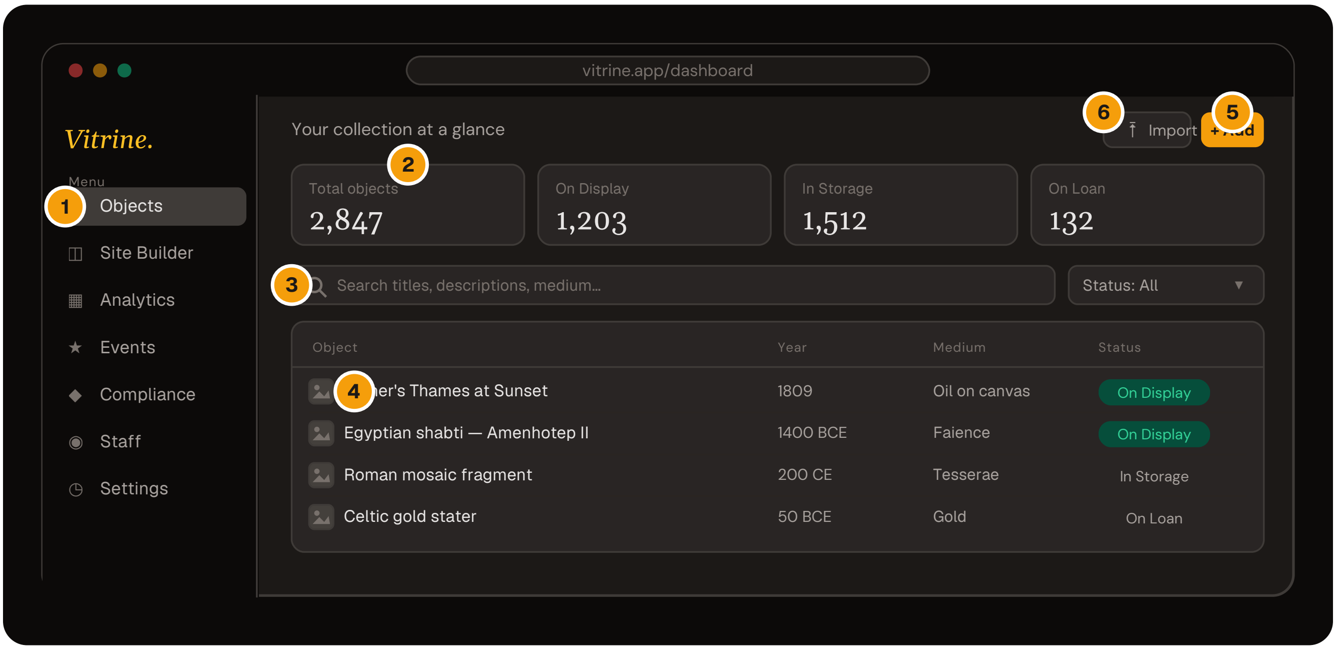

Fig. 1 The dashboard — your home base. Counts update live and the sidebar takes you everywhere.

1. Sidebar — your main navigation. Every area of Vitrine is one click away; the highlighted item is the page you're on.
2. Collection summary — live counts by status (total, on display, in storage, on loan) so you see the shape of your collection at a glance.
3. Search & filter bar — type to search titles, descriptions and medium in real time; use the Status dropdown to narrow the list.
4. Object row — click an object's title to open its full detail page for editing.
5. + Add object — opens a blank object record (top-right of the Objects page).
6. Import — bulk-import objects from a CSV spreadsheet (Professional and above).

Good to know. Vitrine adapts to your plan. Community and Hobbyist run a streamlined interface focused on objects and your website; Professional and above reveal the full toolkit — analytics, events, compliance and staff. Everything in this guide is labelled with the plan it needs.

Plans at a glance

Plan	Price	Objects	Images / object	Staff	Headline features
Community	Free	100	1	1	Public site, QR codes, wishlist, value tracking
Hobbyist	£5/mo	1,000	5	1	+ Analytics, CSV import/export, all templates, 100 MB docs
Professional	£79/mo	5,000	10	10	+ 21 Spectrum procedures, ticketing, Visit/About pages, 1 GB docs
Institution	£349/mo	100,000	10	∞	+ Unlimited staff, 10 GB document storage
Enterprise	Contact	∞	10	∞	+ SSO, dedicated support & SLA, unlimited storage

★ **Tip.** Start free on Community and upgrade only when you bump into a limit. Every object, image and setting carries over automatically when you upgrade — nothing is re-entered.

Chapter 2

Getting started

Create your account and set up your museum in minutes.

Two short tasks stand between you and a live museum site: create an account, then run the three-step setup wizard.

Create your account

1. Go to `vitrinecms.com/signup`. Enter your name and email and choose a password, then click **Create account**.
2. Open the verification email from Vitrine and click the confirmation link. (Check spam if it hasn't arrived within a minute.)
3. You're taken straight into the setup wizard.

Set up your museum (the wizard)

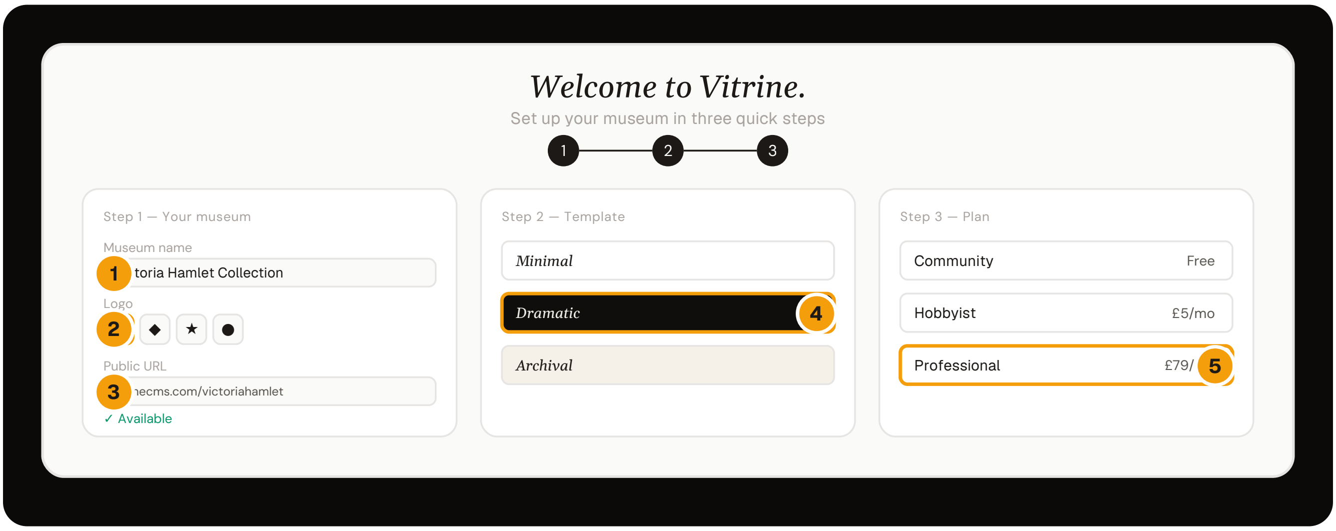

Fig. 2 The three-step setup wizard — name & URL, a starting template, then your plan.

1. Museum name — appears on your public website and in every automated email. You can change it later in Settings.
2. Logo emoji — a quick visual identity for the dashboard; you can upload a real logo image afterwards in Site Builder.
3. Public URL (slug) — your permanent web address, e.g. yourslug.vitrine.app. Vitrine checks availability live and suggests an alternative if it's taken.
4. Template — pick a starting look (Minimal, Dramatic, Archival). Everything is customisable later in the Site Builder.
5. Plan — choose Community (free) up to Enterprise. Paid plans go to secure Stripe checkout; you can upgrade or downgrade any time.

1. **Your museum.** Type your museum name, pick a logo emoji, and choose your public URL (slug). Vitrine checks the slug live and offers an alternative if it's taken.
2. **Template.** Choose a starting look — Minimal, Dramatic or Archival. You can change everything later in the Site Builder.
3. **Plan.** Pick Community (free) or a paid tier. Paid plans go to secure Stripe checkout; on success you land on your dashboard, ready to add objects.

▲ **Important.** Your URL slug is your permanent public address (e.g. `mattscoins.vitrine.app`). On Community it can't be changed afterwards, so pick something short and recognisable that will still fit as your collection grows. (Paid plans can change it later in Settings; or email hello@vitrine.app.)

Find your way around

The sidebar is always visible on desktop; on mobile, tap the menu icon (three lines) top-left. The items, top to bottom:

Sidebar item	What it's for	Plan
Objects	Your collection catalogue — add, edit, search, import	All
Site Builder	Your public website's look and content	All
Analytics	Visitor statistics for your public site	Hobbyist+
Events	Create events and manage ticket bookings	Professional+
Compliance	Documentation score across the collection	Professional+
Staff	Invite team members and set their roles	Professional+
Settings	Profile, plan, billing and museum details	All

Chapter 3

Your collection

Add, edit, import and organise the objects in your collection.

The Objects section is the heart of Vitrine. Every physical item gets its own record; the more detail you add, the richer your public pages become. Capacity ranges from 100 objects on Community to unlimited on Enterprise.

Add an object

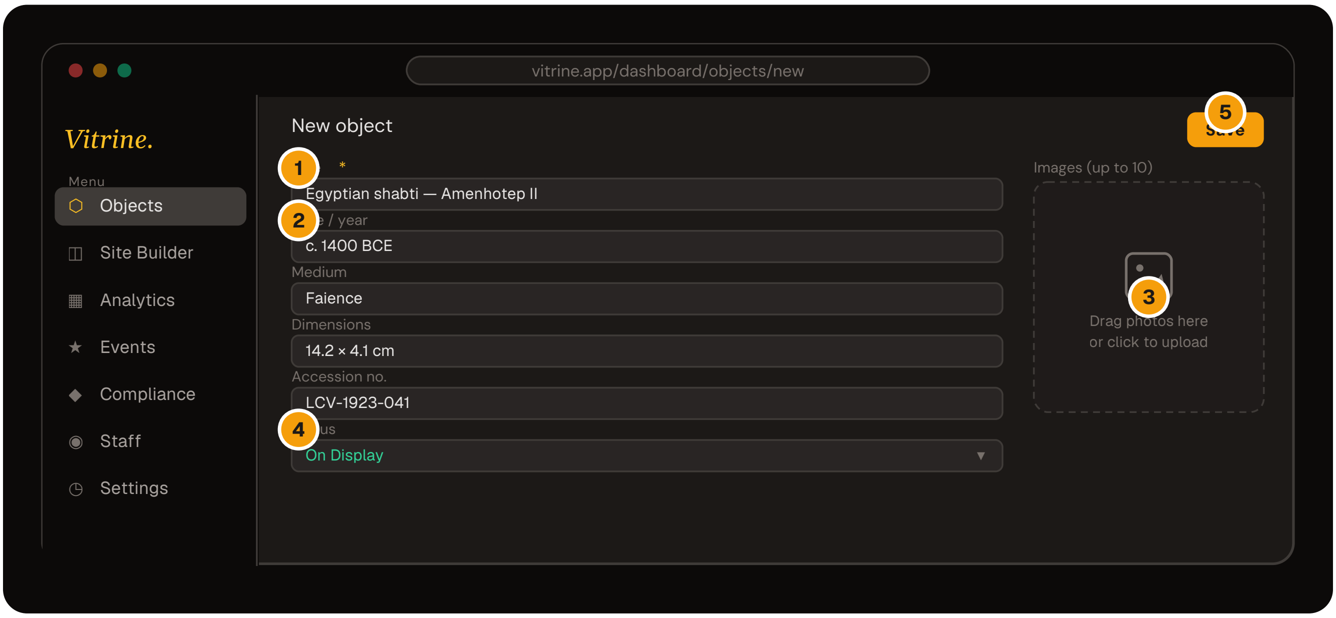

Fig. 3 The new-object form. Only Title is required — add what you have and refine later.

1. Title — the only required field (marked *). Everything else is optional; add what you have now and fill in the rest later.
2. Descriptive fields — date, medium, dimensions, accession number and a free-text description. The more you add, the richer your public pages.
3. Image panel — drag photos or click to upload (JPG/PNG/WebP). Drag to reorder; the first image becomes the primary display image. 1 image on Community, up to 10 on Professional.
4. Status — controls public visibility. On Display = live on your website; any other status hides it from visitors.
5. Save — adds the object. If it's On Display, it appears on your public site immediately.

1. Click **Objects**, then **+ Add object** (top-right).
2. Type the **Title** (the only required field).
3. Fill in any of: date/year, medium, dimensions, accession number and a free-text description.
4. Add photos in the image panel — drag & drop or click to upload (JPG/PNG/WebP). Drag to reorder; the first image is the primary one shown in your catalogue and site.

5 Set the **Status** (see the table below), then click **Save**.

★ **Tip.** Don't let perfect be the enemy of good. A record with just a title and a photo now beats a blank you keep meaning to fill in. You can edit any object at any time.

Object statuses

An object's status controls both how it's organised and whether the public can see it. **Only** On Display **objects appear on your website** — there is no separate publish button.

Status	Meaning	Public?
On Display	Currently shown and live on your public site	**Visible**
In Storage	In the collection but not shown publicly	Hidden
On Loan	Lent to another institution	Hidden
Restoration	Undergoing conservation work	Hidden
Deaccessioned	Permanently left the collection; kept in your archive view	Hidden

Edit, find & organise

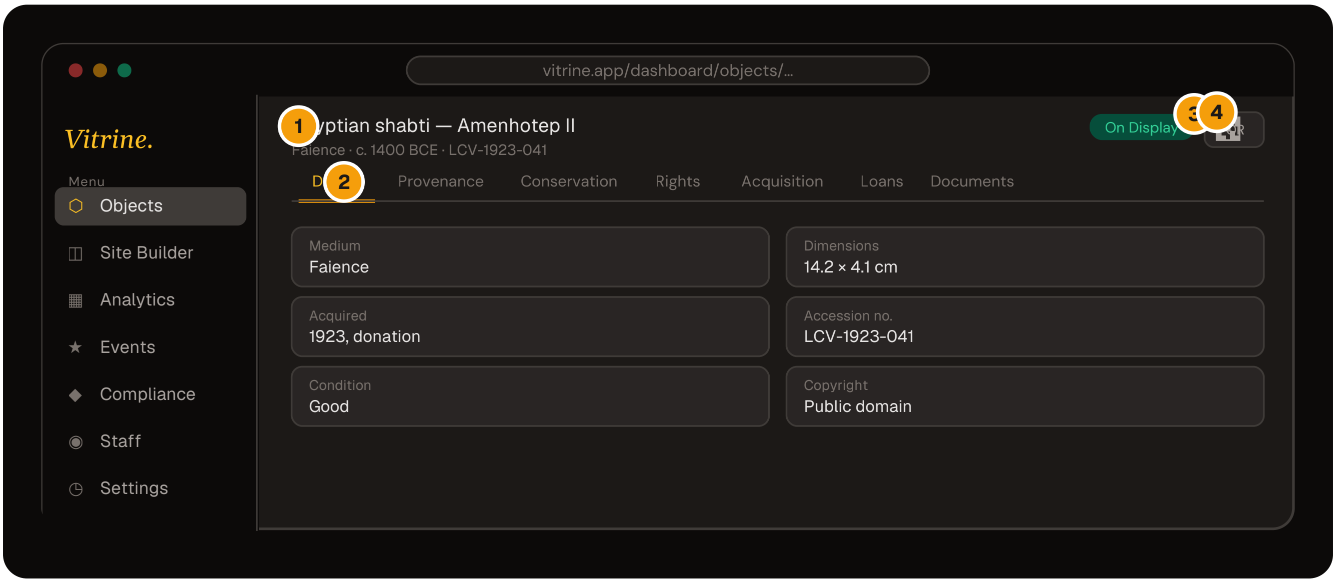

Fig. 4 An object's detail page. Tabs group the record; compliance tabs appear on Professional+.

1. Identity header — title, key facts and accession number stay visible while you work through the tabs.
2. Record tabs — each tab holds a slice of the record: Details, Provenance, Conservation, Rights, Acquisition, Loans and Documents. (Compliance tabs appear on Professional and above.)
3. Status badge — shows and lets you change public visibility at a glance.
4. QR label — generate a printable QR code that links straight to this object; ideal for gallery labels and storage tags.

1 **Edit:** click an object's title in the list to open its detail page, change any field or image, then **Save changes**. Updates to On Display objects are live instantly.

2. **Search:** type in the search bar — Vitrine matches titles, descriptions and medium as you type. Clear with the × in the bar.
3. **Filter:** use the **Status** dropdown beside the search bar to show, say, only objects On Loan.
4. **Hide vs. delete:** change status away from On Display to hide an object while keeping the record. To delete permanently, scroll to the bottom of the detail page and click **Delete object**.

> ▲ **Important.** Deletion is permanent — the record and its images are removed for good. If there's any chance you'll want it again, use `Deaccessioned` instead.

Bulk import from a spreadsheet Professional+

1. Click **Objects → Import** (the upward-arrow icon in the toolbar).
2. Click **Download CSV template** and fill it in — only the **Title** column is required.
3. Save as CSV and drag it onto the import drawer (or click to upload).
4. Review the validation preview — rows with errors are highlighted in red with an explanation.
5. Fix and re-upload, or dismiss bad rows, then click **Confirm import**.

> ★ **Tip.** Import in batches of 500–1,000 rows — errors are easier to spot, and you can review each batch before the next. Import creates new records; it doesn't update existing ones.

Documents, depositors & QR labels Professional+

1. **Attach a document:** open an object → **Documents** tab → **+ Attach document**, choose the file, add a short label (e.g. "Acquisition receipt 1962"), then **Upload**. Storage counts toward your plan quota.
2. **Record a depositor/acquisition:** on the **Acquisition** tab, enter depositor details, acquisition method (Purchase, Donation, Bequest, Transfer, Field collection, Unknown), date, GDPR-consent and receipt-issued toggles.
3. **Print a QR label:** click the **QR label** icon (top-right of the detail page), choose a format (tag, card or A5 sheet), then **Print** or **Download PDF**. Scanning it opens the object's page.

Chapter 4

Your public website

Publish your collection online — live from day one.

Every account has a live public site at `yourslug.vitrine.app` from the moment you sign up — nothing to switch on. It's fast, mobile-optimised and accessible out of the box.

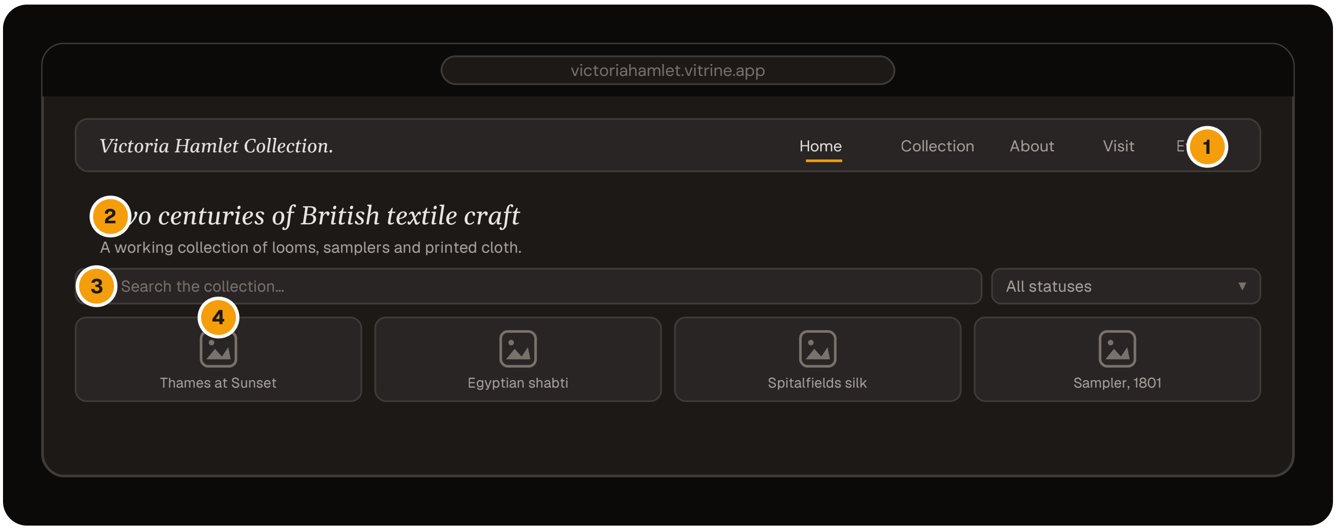

Fig. 5 Your public site. On Professional+ it's a full multi-page website with About, Visit and Events.

1. Page navigation — visitors move between Home, Collection, About, Visit and Events. About/Visit/Events appear on Professional and above.
2. Hero — your tagline and description, set in Site Builder → Content.
3. Search & filter — visitors search and filter your published objects exactly as you do in the dashboard.
4. Object grid — every object set to On Display appears here; clicking one opens its public detail page.

What visitors see

Page	Contents	Plan
Home	Museum name, tagline, description and featured objects	All
Collection	Searchable, filterable browser of every On Display object, with per-object detail pages	All
About	Your story, mission, team and facilities	Professional+
Visit	Opening hours, admission, address, accessibility, directions	Professional+
Events	Upcoming events with online booking	Professional+

Publishing & visibility

An object's **Status** is the single switch that controls public visibility — set it to On Display and save, and it's live immediately; set it to anything else and it vanishes from the site at once. There's no cache to wait for.

1. **Show an object:** open it, set Status to **On Display**, **Save changes**.
2. **Hide an object:** set Status to anything else (e.g. In Storage) and save.
3. **View your live site:** click **Site Builder → View live site** to open it in a new tab — exactly what visitors see. Bookmark and share the URL anywhere.

★ **Tip.** Your public URL works for anyone, no account needed. Put it on printed labels, email signatures and social media to drive people to your collection.

Chapter 5

Customisation & Site Builder

Make your public site look and feel like yours — no code.

The Site Builder is where your site becomes yours — logo, colours, template, homepage text, featured objects and (on Professional+) full About and Visit pages. No design skill or code needed. Changes preview live and go public only when you click **Publish**.

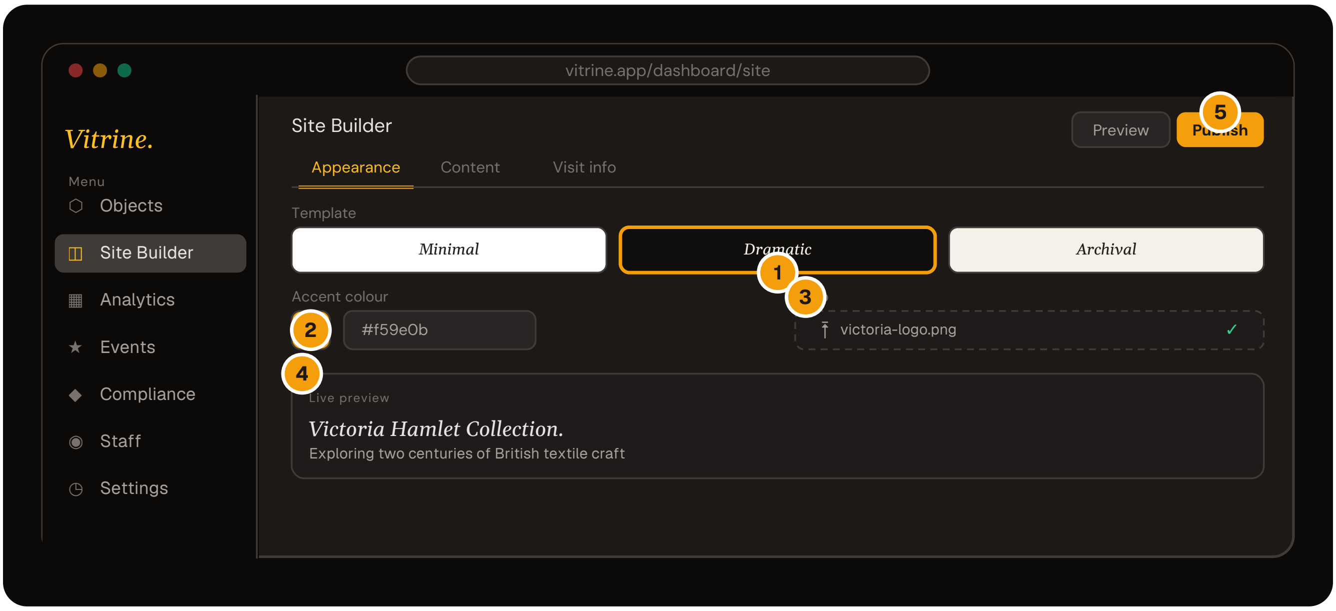

Fig. 6 The Site Builder. Tabs organise the controls; the live preview shows changes before you publish.

1. Template — switch the whole site layout & typography (Minimal, Dramatic, Archival, and premium templates on paid plans).
2. Accent colour — set the colour used for buttons, links and highlights; type a hex code or use the picker to match your brand.
3. Logo — upload a PNG or SVG (transparent background recommended) to replace the emoji in your site header.
4. Live preview — every change is shown here before it goes live, so you can experiment safely.
5. Publish — pushes your changes to the live public site. Nothing is visible to the public until you click it.

Appearance — template, colour, logo

1. **Template:** Site Builder → **Appearance**, click a template preview (Minimal, Dramatic, Archival; premium templates on paid plans).
2. **Accent colour:** click the swatch and pick a colour, or type a hex code (e.g. `#1a3c6e`). It styles buttons, links and highlights.
3. **Logo:** upload a PNG or SVG (200px wide or larger; transparent background recommended) in the Logo area.
4. Click **Publish** to push changes live.

Content — tagline, featured objects, social

1. **Tagline & description:** Site Builder → **Content**. Write a one-line tagline and an optional short description shown beneath it.
2. **Featured objects:** in the Featured objects section, click **+ Add featured object** and start typing a title to add it. Feature up to 6; drag the ⠿ handle to reorder, click × to remove (this doesn't affect the catalogue record).
3. **Social links:** paste full profile URLs for Instagram, Facebook, X and YouTube; icons appear in your site footer.
4. Click **Publish**.

About & Visit pages Professional+

1. **About:** Site Builder → Content → **About**. Write your story (headings, bold, italic and lists supported) and an optional Facilities list (café, shop, accessible toilets, hearing loop…).
2. **Visit:** Site Builder → **Visit info**. Fill in opening hours, admission, full address, an honest accessibility note, and a "Getting here" travel/parking note.
3. **Temporary notices:** use the Special notices field for closures (e.g. "Closed 24–26 Dec"); it shows prominently atop the Visit page. Clear it and publish when over.

> ★ **Tip.** Out-of-date visit information is the most common complaint on museum websites. Set a calendar reminder to review hours around holidays and temporary closures.

SEO — being found on Google Professional+

1. Site Builder → Content → **SEO**.
2. Set a **Meta title** — format "Museum Name | Short description" (shown as the headline in search results).
3. Set a **Meta description** — 1–2 sentences, under 160 characters.
4. Click **Publish**. Search engines may take a few days to re-index.

Chapter 6

Analytics Hobbyist+

Understand who visits your site and what they look at.

Analytics shows how people find and use your public site. All data is collected first-party by Vitrine — no third-party cookies, no Google Analytics, no consent banner on your site.

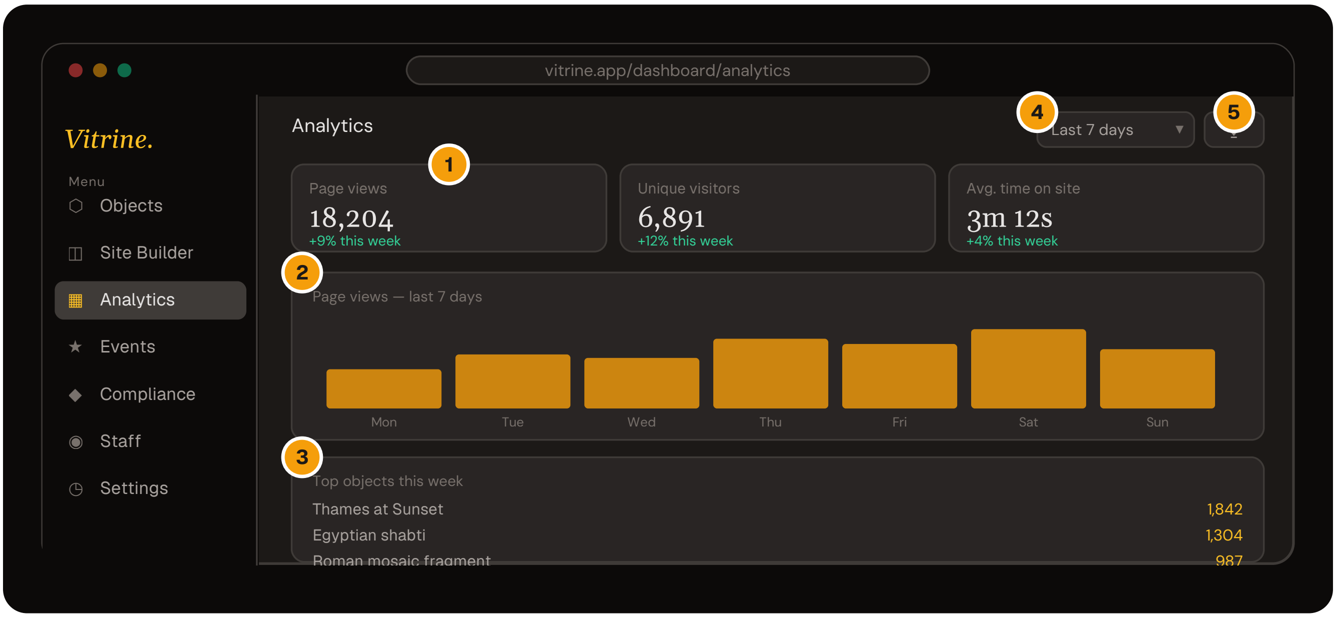

Fig. 7 The Analytics page. Headline numbers, a daily chart, your top objects and traffic sources.

1. Headline numbers — page views, unique visitors and average time on site, each with the change vs. the previous period. (First-party data — no cookie banner needed.)
2. Daily chart — page views per day across the selected range; spot the effect of social posts, press or school holidays.
3. Top objects & traffic sources — your most-visited object pages and whether visitors arrived direct, via search, or from social.
4. Date range — switch between Last 7 / 30 / 90 days or a custom range.
5. Export — download the selected period as a CSV for spreadsheets or reports.

1. **Read the headline numbers:** page views, unique visitors and average time on site, each with the change vs. the previous period.
2. **Change the range:** use the selector (top-right) — Last 7 / 30 / 90 days, or a custom range via the calendar, then **Apply**. Everything updates.
3. **Find popular objects:** scroll to **Top objects**; click any title to jump to its detail page and improve it.
4. **See where visitors come from:** the **Traffic sources** breakdown splits Direct, Search and Social — low Search suggests improving SEO; low Social suggests sharing object pages.
5. **Export:** click the download icon by the date selector and choose **CSV**.

★ **Tip.** Your top-objects list is the most actionable data here. Invest in those records — better photos, fuller descriptions, deeper provenance — and your whole collection looks stronger.

Chapter 7

Ticketing & events Professional+

Create events and sell tickets directly on your own site.

Create events, manage capacity and take bookings directly on your own site — no Eventbrite. Free events work instantly; paid events use Stripe and pay out to your bank.

How it works, end to end

You create an event → it appears on your public Events page → visitors book with name & email (paid events are charged via Stripe) → both sides get an automatic confirmation email → you track attendance on the day from the dashboard.

Good to know. Vitrine charges a **2% platform fee** on paid ticket sales; standard Stripe processing fees (typically 1.4% + 25p for UK cards) also apply. Free events are entirely free.

One-time payment setup (paid events only)

1. Click **Events → Payouts** tab.
2. Click **Connect with Stripe** and complete the Stripe-hosted form (legal name, address, organisation type, UK bank sort code & account number).
3. When verified, you return to Vitrine showing a green **Connected** status. You can now create paid events.

★ **Tip.** Free-entry events need no Stripe connection — you can start taking bookings for them right away.

Create an event

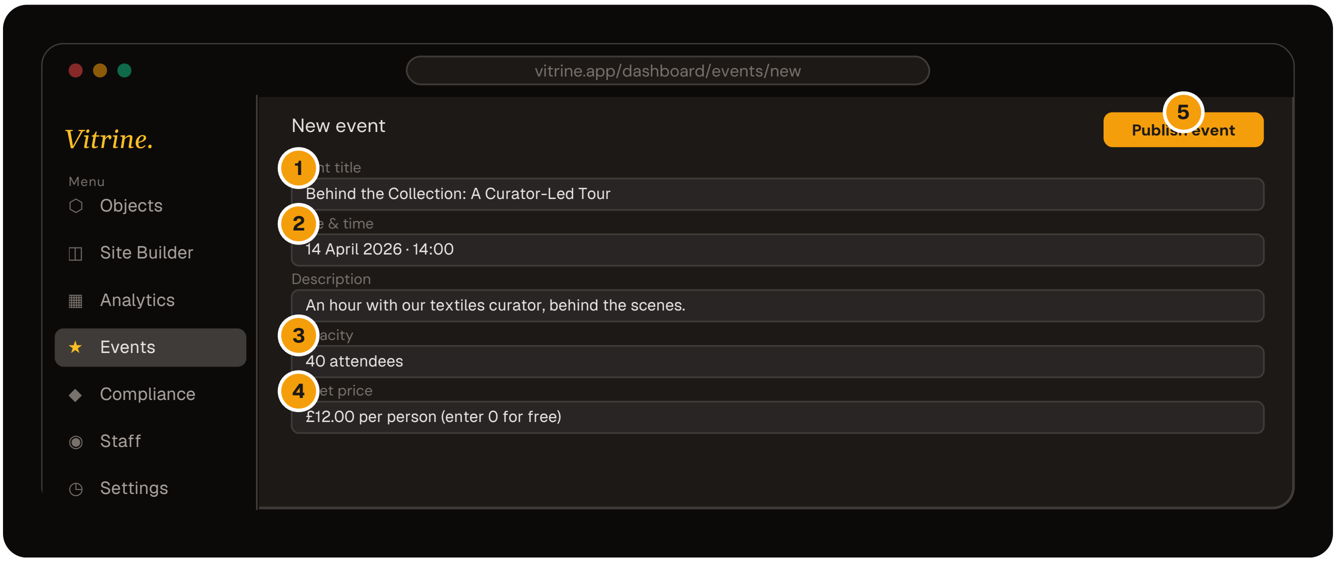

Fig. 8 The new-event form. Enter 0 for the ticket price to make an event free.

1. Event title & description — shown on the public Events page and in the confirmation email each attendee receives.
2. Date & time — set the start (and optionally end) with the date picker.
3. Capacity — the booking form closes automatically once this many tickets are taken.
4. Ticket price — enter 0 for a free event (no payment setup needed). Paid events require a one-time Stripe Connect bank setup on the Payouts tab; Vitrine charges a 2% platform fee plus Stripe's fees.
5. Publish event — it appears on your public Events page immediately and starts taking bookings.

1. Click **Events → + New event**.
2. Enter a clear **title** and a **description** (shown on the booking page and in the confirmation email).
3. Set **date & time** with the picker (optional end time).
4. Set **capacity** — the form closes automatically when it's reached.
5. Set the **ticket price** (`0` = free; otherwise price per person in pounds).
6. Click **Publish event** — it goes live on your Events page immediately.

Manage bookings, attendance & refunds

1. **See bookings:** open the event → **Bookings** tab (name, email, time, payment status; capacity bar at the top).
2. **Check people in:** on the day, use the **Attendance** tab — tick names as they arrive (rows turn green), or tap **Scan tickets** to read each attendee's QR code.
3. **Refund one booking:** Bookings tab → **Refund** on that row → **Confirm**. The attendee is emailed automatically; money returns in 5–10 business days.
4. **Cancel the whole event:** open it → **Cancel event**. All paid bookings are auto-refunded and everyone is emailed.
5. **Edit an event: Edit event** → change details (you can't cut capacity below current bookings) → **Save changes**.

▲ **Important.** Refunds don't return Stripe's processing fee — the customer receives the net amount you were paid. Also, editing an event does not auto-email existing attendees; if you change the date or time, message them from the Bookings tab.

Chapter 8

Staff & roles `Professional+`

Invite your team and control exactly who can do what.

Give each team member their own login with a role that precisely controls what they can see and do. Professional supports 10 staff; Institution and Enterprise are unlimited.

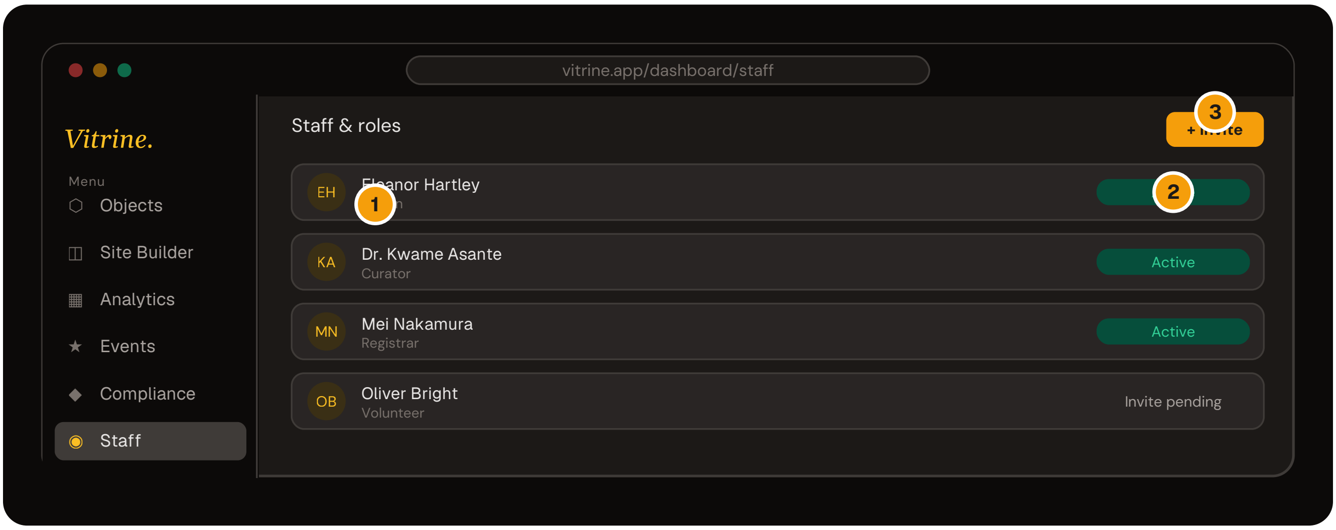

Fig. 9 The Staff page. Each person has an individual login, a role, and an active/pending status.

1. Role — every member has one of four roles that precisely controls access: Admin, Curator, Registrar or Volunteer. Click a name to change role or remove the person.
2. Status — shows whether an invitation is still pending or the member is Active. Invitations are valid for 7 days and can be resent.
3. + Invite — add a teammate by email and assign a role; they get a link to create their own login (10 staff on Professional, unlimited on Institution/Enterprise).

Invite & manage

1. **Invite:** Staff → **+ Invite** → enter their email → choose a role → **Send invitation**. The link is valid 7 days; they show as “Invite pending” until they accept.
2. **Resend:** click a pending person's name → **Resend invitation**.
3. **Change role:** click their name → pick a new **Role** → **Save changes** (takes effect immediately).
4. **Remove:** click their name → **Remove from museum** → confirm. Access ends at once; their Vitrine account itself isn't deleted.

Roles & permissions

Capability	Admin	Curator	Registrar	Volunteer
View objects	✓	✓	✓	✓
Add & edit objects	✓	✓	✓	—
Manage compliance data	✓	✓	✓	—
Attach documents	✓	✓	✓	—
Edit site content	✓	✓	—	—
Manage events & bookings	✓	✓	—	—
View analytics	✓	✓	—	—
Invite & remove staff	✓	—	—	—
Access billing & plan	✓	—	—	—

★ **Tip.** Use **Volunteer** (read-only) for researchers and temporary helpers — they can look anything up with zero risk of accidental edits. Reserve **Admin** for the few who manage the account itself.

Chapter 9

Compliance Professional+

Provenance, rights, conservation and loans — with a live score.

The Compliance section helps you build and keep the documentation responsible museum practice requires. Vitrine tracks five areas across the whole collection and gives a live score — the share of objects with complete documentation.

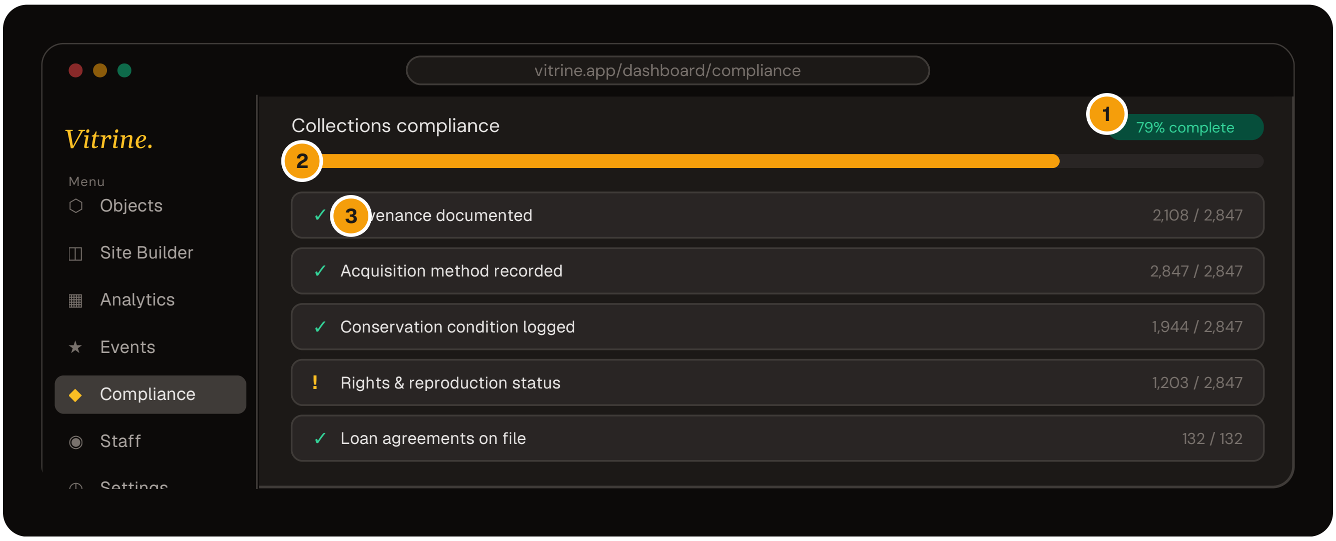

Fig. 10 The compliance dashboard. A live score, a progress bar, and a per-category breakdown with gaps flagged.

1. Compliance score — the share of your whole collection with all five key fields documented (Spectrum-aligned; supports Arts Council England accreditation).
2. Progress bar — your overall documentation completeness at a glance.
3. Category breakdown — provenance, acquisition method, conservation condition, rights and loans. A ✓ means complete; an amber ! flags gaps — click a category to see exactly which objects are missing data.

Good to know. Vitrine's compliance tools are built around the UK's Spectrum collections-management standard and align with the documentation requirements for Arts Council England accreditation.

Check your score

1. Click **Compliance**. The overview shows your overall percentage and a progress bar.
2. Each of the five categories shows its own completion (e.g. “Provenance documented: 131/142”). A green ✓ means complete; an amber ! flags gaps.
3. Click a category to list the exact objects missing that data; click an object title to jump in and fill it.

Record each area (on the object's tabs)

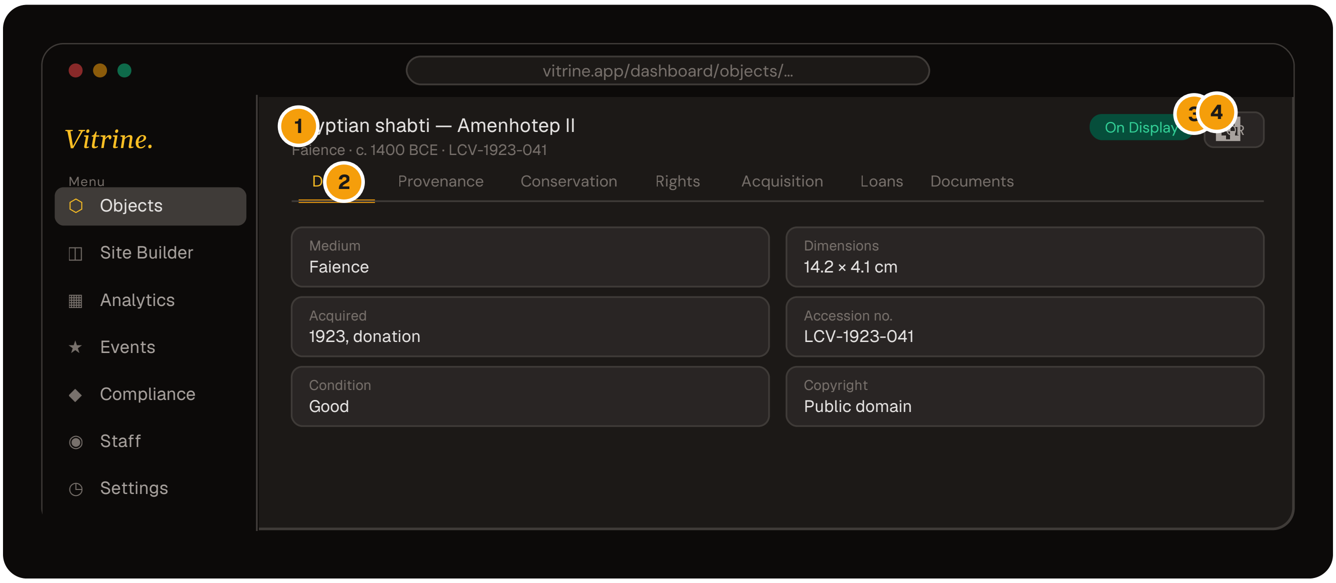

Fig. 11 Compliance data lives on the object's own tabs: Provenance, Acquisition, Conservation, Rights and Loans.

1. Identity header — title, key facts and accession number stay visible while you work through the tabs.
2. Record tabs — each tab holds a slice of the record: Details, Provenance, Conservation, Rights, Acquisition, Loans and Documents. (Compliance tabs appear on Professional and above.)
3. Status badge — shows and lets you change public visibility at a glance.
4. QR label — generate a printable QR code that links straight to this object; ideal for gallery labels and storage tags.

Area	Tab	What to record
Provenance	Provenance	**+ Add provenance entry** for each stage: date/range, description, and the person or institution. Build a chain from origin to today.
Acquisition	Acquisition	Method (Purchase, Donation, Bequest, Transfer, Field collection, Unknown), date, and notes (vendor, donor, funding).
Conservation	Conservation	Condition rating (Excellent → Critical), descriptive notes, and assessment date. Attach a formal report in Documents.
Rights	Rights	Copyright status (In copyright, Public domain, Unknown, Orphan work), rights holder, licence terms and restrictions.
Loans	Loans	**+ Add loan record**: type (Loan in/out), institution, start/end dates, conditions. Also set Status to **On Loan**.

★ **Tip.** Even partial provenance beats none. Record what you know confidently and flag gaps explicitly (e.g. “Ownership 1910–1962 unverified”) — a documented acknowledgement of uncertainty is more credible than a blank.

▲ **Important.** When a loan ends, update both the object's status (back to On Display or In Storage) and the loan record's end date, so your compliance dashboard stays accurate.

Chapter 10

Collections-management procedures

All 21 Spectrum 5.1 procedures, step by step. Professional / Institution

This is what sets Vitrine apart from a simple catalogue: it implements all **21 Spectrum 5.1 procedures** — the UK collections-management standard. Each procedure has a central register in the sidebar and/or a tab on the object record, and feeds the live compliance score from Chapter 9. Procedures 1–8 are available on Professional; the rest on Institution and above.

Good to know. You don't have to use every procedure. Start with the ones your accreditation or insurer needs (entry, location, loans, condition) and grow into the rest. Every register supports document attachments and is isolated to your museum.

Object entry & intake

The front door of the collection: log objects the moment they arrive, before they're formally accessioned.

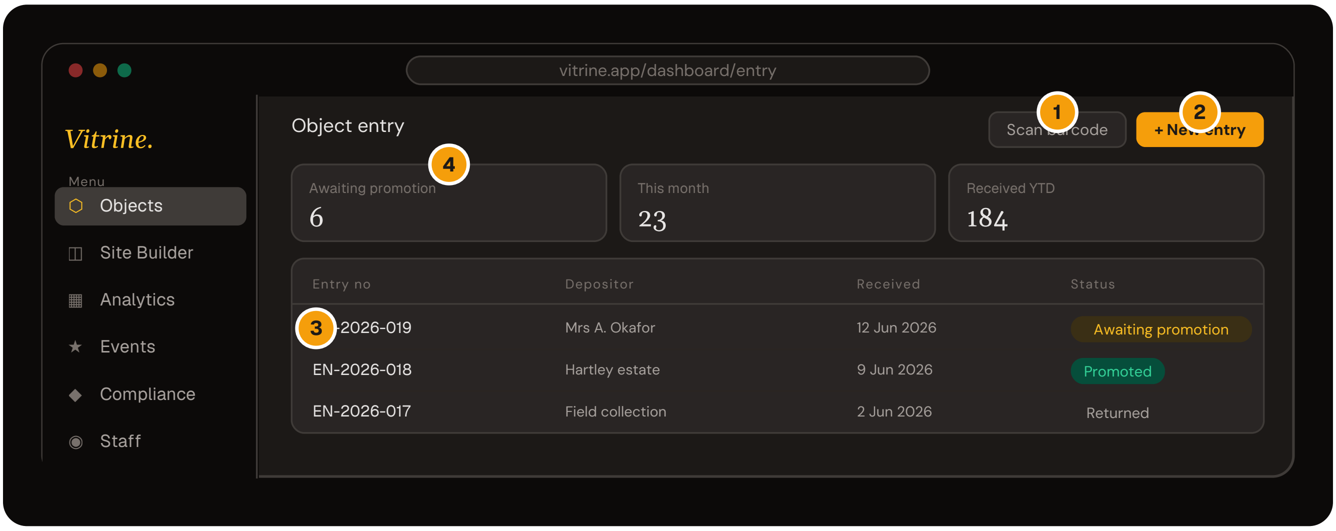

Fig. 12 Object entry (Procedure 1) — the entry register, with barcode scanning and 'promote to object'.

1. Scan barcode — look up or pre-fill an entry from a printed barcode using your device camera.
2. + New entry — log an object the moment it arrives: depositor, GDPR consent, condition on entry, terms and receipt.
3. Each entry gets an auto entry number (EN-YYYY-NNN). Open one and click Promote to turn it into a full catalogue object with an accession number.
4. See what's awaiting promotion and your intake over time at a glance.

1 Click **Objects → Entry** (or press N). Click **+ New entry**, or **Scan barcode** to pre-fill from a label.

2. Record the depositor, condition on entry, GDPR consent, terms accepted and whether a receipt was issued. An entry number (EN-YYYY-NNN) is generated.
3. When the object is accepted, open the entry and click **Promote** to create a full catalogue object with an accession number.

Accession & accessioning

The formal, permanent register of everything accepted into the collection.

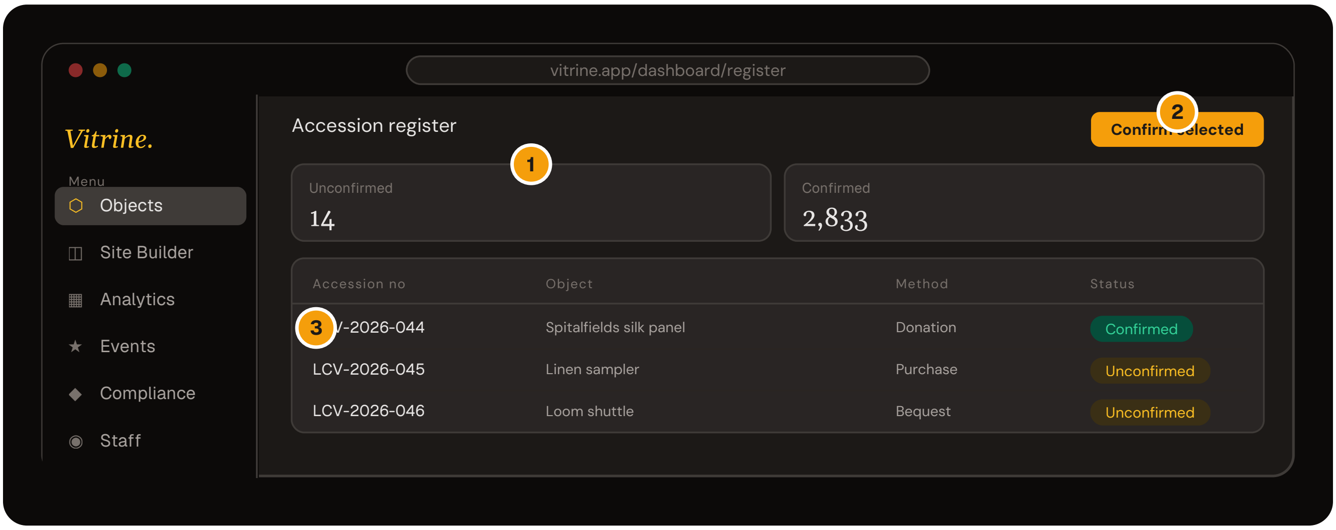

Fig. 13 Accession register (Procedure 2) — confirm accessions only when their records are complete.

1. The register shows how many accessions are formally confirmed versus still incomplete.
2. Confirm selected — the register blocks confirmation until every required field is filled, keeping accessions complete.
3. Unconfirmed rows flag missing data; open an object to complete it, then confirm it into the permanent register.

1. Open **Objects → Accession register**. Unconfirmed rows flag records that are still missing required data.
2. Open an object to complete its acquisition details (method, source, justification, value), then **Confirm** it into the permanent register.

Location & movement control

Always know where every object is, and never lose track of a temporary move.

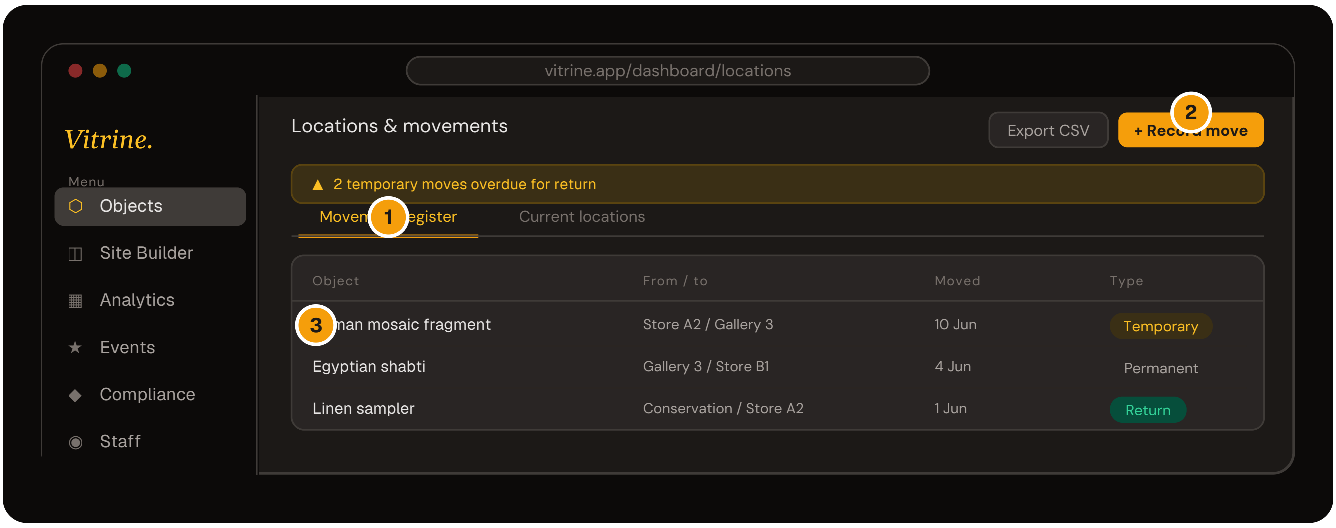

Fig. 14 Location & movement (Procedure 3) — movement register, current locations, and overdue-move alerts.

1. Two views: a Movement register (every move, filterable) and Current locations (objects grouped by where they are now).
2. + Record move — log a move with from/to location, mover, type and an expected return for temporary moves.
3. Locations use structured codes (building / floor / room / unit / position) so anything can be found fast.

1. Go to **Objects → Locations**. The **Movement register** lists every move; **Current locations** groups objects by where they are now.
2. Click **+ Record move**, choosing from/to (structured location codes), type (permanent/temporary/return) and an expected return date for temporary moves.
3. Overdue temporary moves are flagged at the top of the page so they're chased up.

Object exit

A controlled record of anything leaving the building — for loan, conservation, photography, research or disposal.

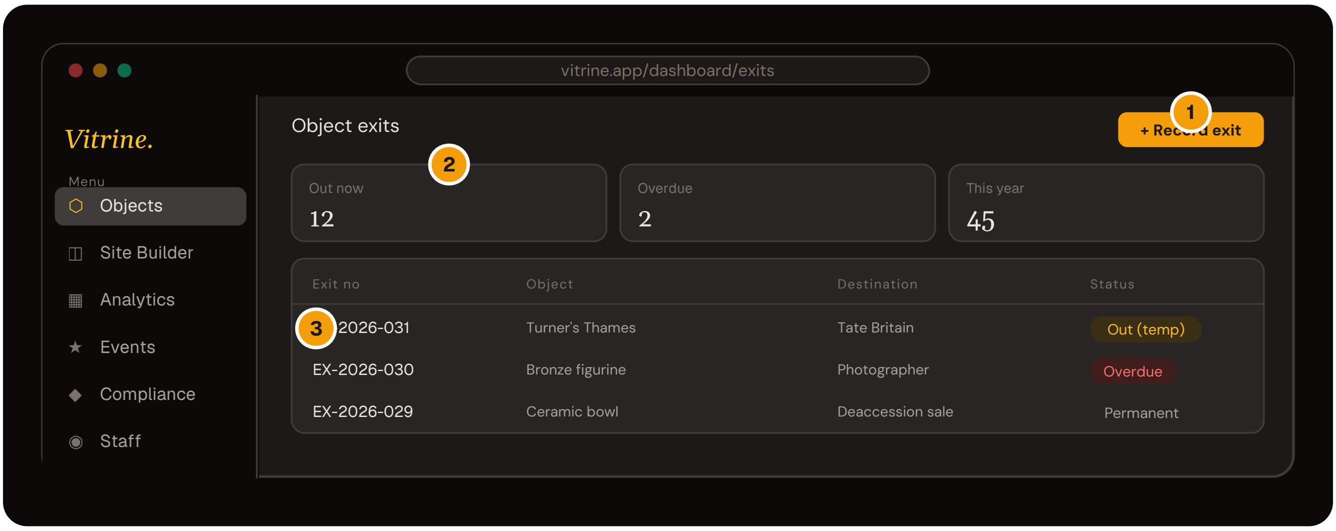

Fig. 15 Object exit (Procedure 6) — what's out, where it went, and what's overdue back.

1. + Record exit — log anything leaving the building (loan, conservation, photography, research, disposal) with recipient, transport and insurance check.
2. See what's out now and, crucially, what's overdue back.
3. Temporary exits track an expected return date; overdue ones turn red so nothing is forgotten.

1. From an object, open the **Exits** tab and **Record exit**: reason, recipient, destination, transport, insurance check and (if temporary) an expected return.
2. The **Objects → Exits** register shows everything currently out; overdue returns turn red.

Loans in & out

Full lifecycle for borrowing and lending, with agreements, insurance values and due-date alerts.

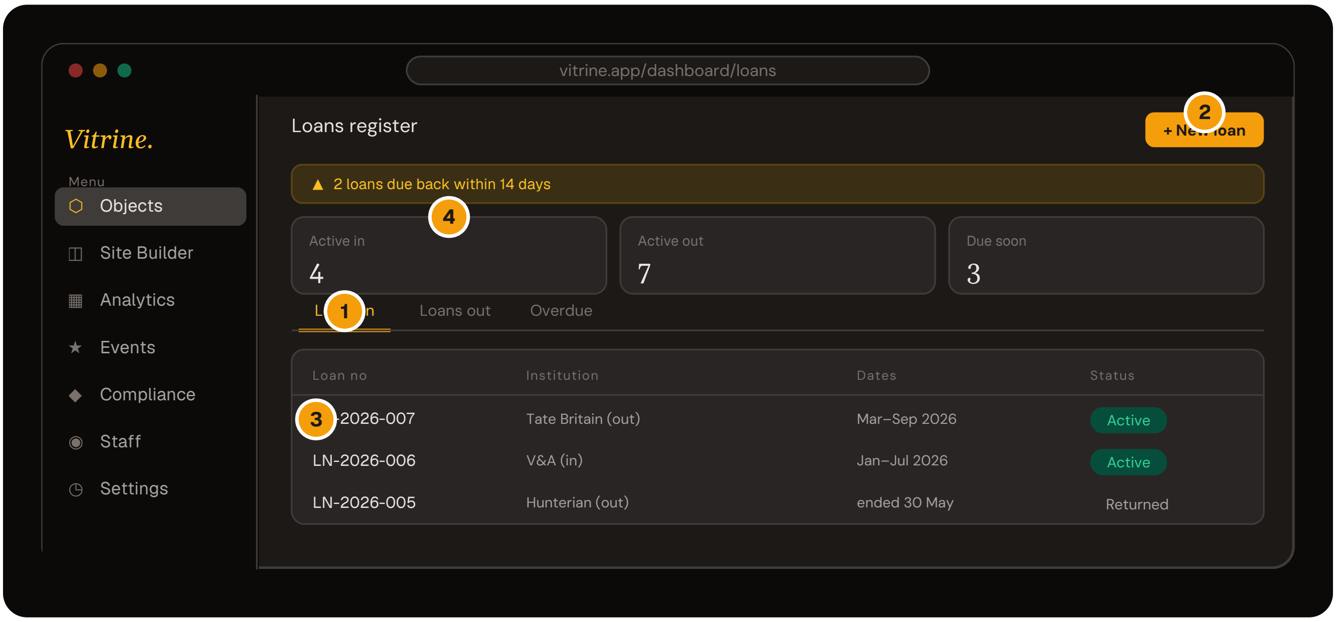

Fig. 16 Loans (Procedures 7 & 8) — one register, filtered by direction, with due-soon alerts.

1. Filter by Loans in, Loans out, or Overdue. Each loan tracks agreement, insurance value, conditions and dates.
2. + New loan — record a loan in or out with the institution, dates, purpose, insurance value and conditions.
3. Loan numbers auto-generate (LN-YYYY-NNN); open a loan to add documents or run the return workflow.
4. Headline counts of active loans in/out and any due back soon.

1. Open **Objects → Loans** and click **+ New loan**. Pick direction (in/out), institution, dates, purpose, insurance value and conditions.
2. Use the **Loans in / Loans out / Overdue** tabs to track status; attach the signed agreement in Documents.
3. For a loan out, set the object's status to **On Loan**; run the return workflow (with return condition) when it comes back.

Inventory & audit exercises

Prove you know what you hold with planned counts and discrepancy reporting.

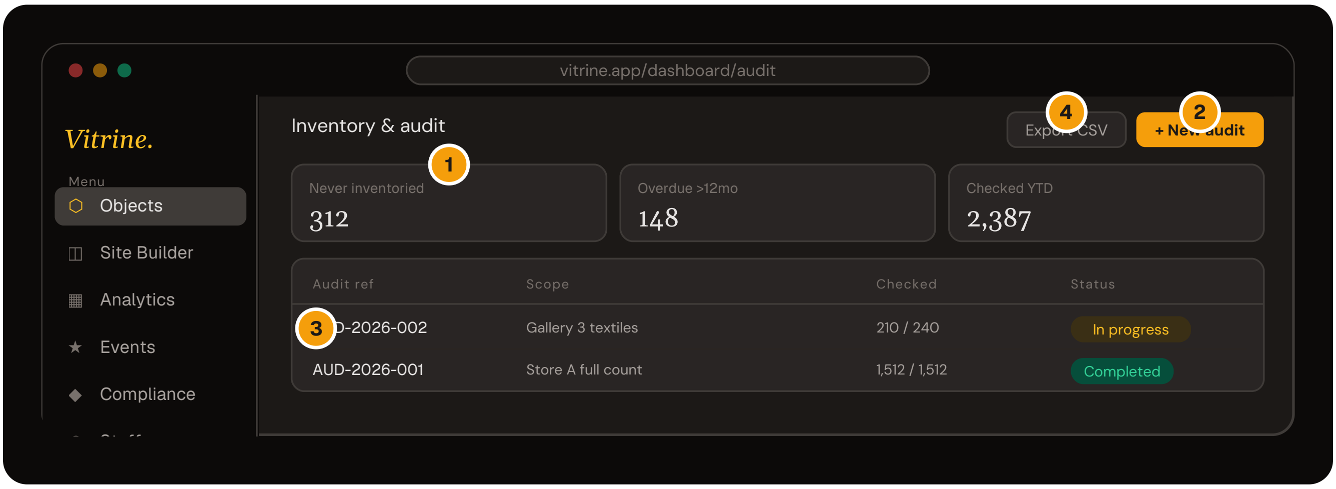

Fig. 17 Inventory & audit (Procedures 4 & 21) — find never-checked and overdue objects, run audit exercises.

1. Surfaces the objects never inventoried and those overdue a check (>12 months), so you can prioritise.
2. + New audit — start a planned inventory exercise: scope, method, auditor, and record discrepancies as you go.
3. Each exercise tracks objects checked vs. discrepancies and produces a governance-ready report.
4. Export the inventory to CSV for spreadsheets or trustees.

1. Open **Objects → Audit**. The stats surface objects never inventoried and those overdue (>12 months).
2. Click **+ New audit** to start an exercise (scope, method, auditor); record each object as checked, noting any discrepancy.
3. On completion you get a governance-ready report; export the inventory to CSV any time.

Condition checking

Dated technical assessments of an object's physical state, separate from active treatments.

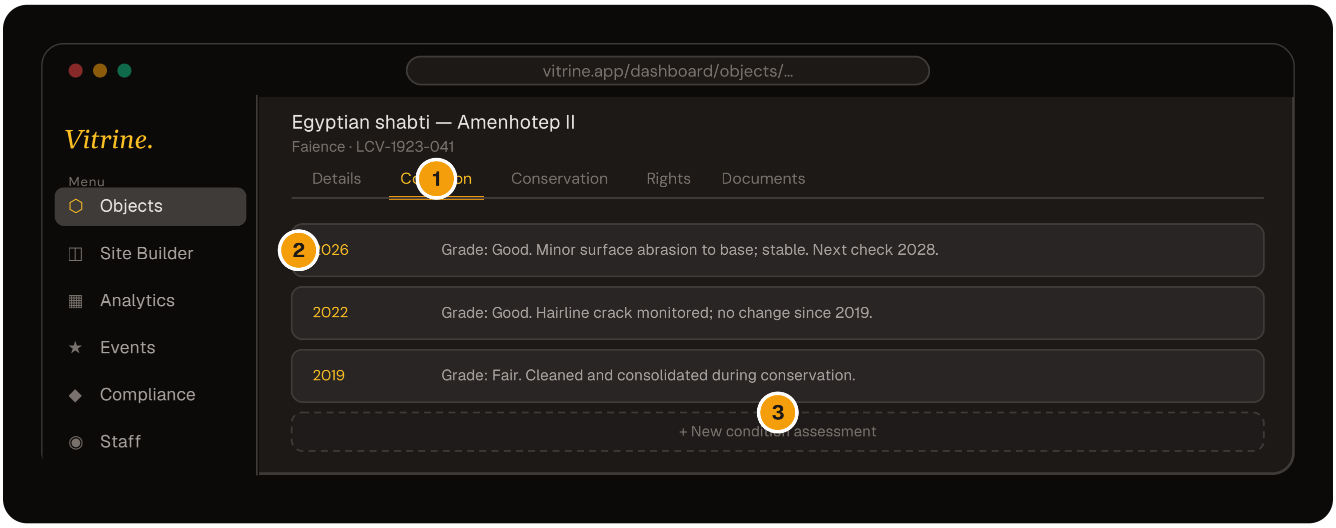

Fig. 18 Condition checking (Procedure 11) — grades and notes over time, on the object's Condition tab.

1. The Condition tab holds dated technical assessments separate from active treatments.
2. Each assessment records a grade (Excellent → Critical), specific issues, hazards and a next-check date.
3. + New condition assessment — log the current state so future staff can see how condition changes over time.

1. Open an object → **Condition** tab → **+ New condition assessment**.

2. Record a grade (Excellent → Critical), specific issues, any handling hazard, recommendations and a next-check date.

Conservation & collections care

Treatment history with before/after images and costs.

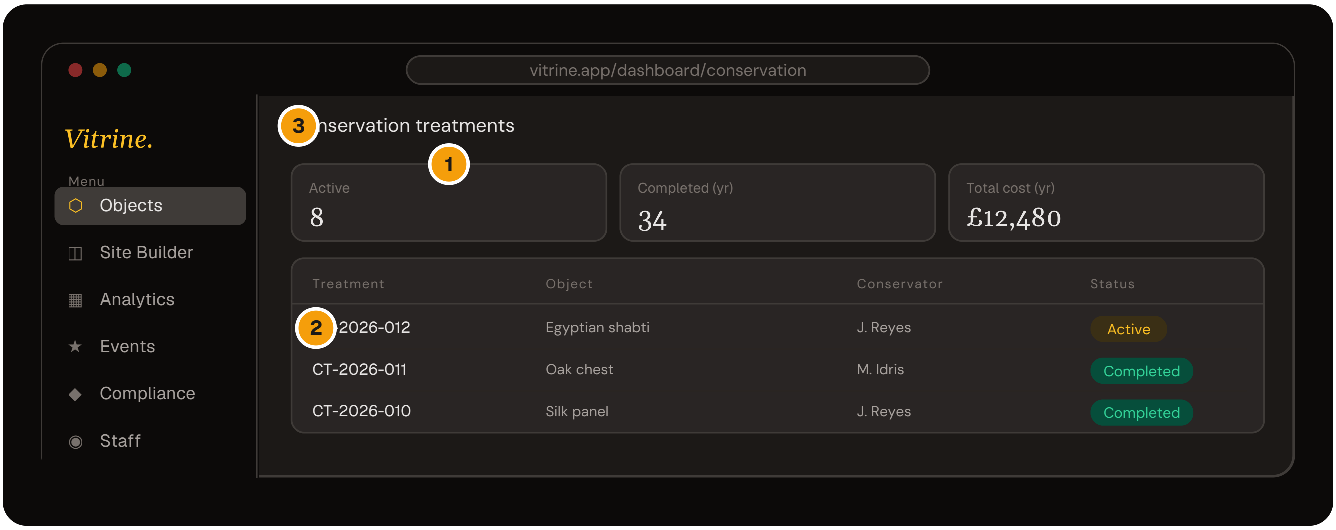

Fig. 19 Conservation (Procedure 12) — the treatments register; treatments are created from an object's Conservation tab.

1. Live counts of active treatments, completions this year and total treatment cost.
2. Treatments (auto ref CT-YYYY-NNN) record type, materials, cost and before/after images. Created from an object's Conservation tab.
3. The register collects every treatment across the collection; open one for full detail and documents.

1. From an object's **Conservation** tab, log a treatment: type, conservator, dates, materials, cost and before/after images.
2. The **Objects → Conservation** register collects every treatment with active/completed status and yearly cost totals.

Loss & damage

A governance record of incidents, with severity, claims and notification tracking.

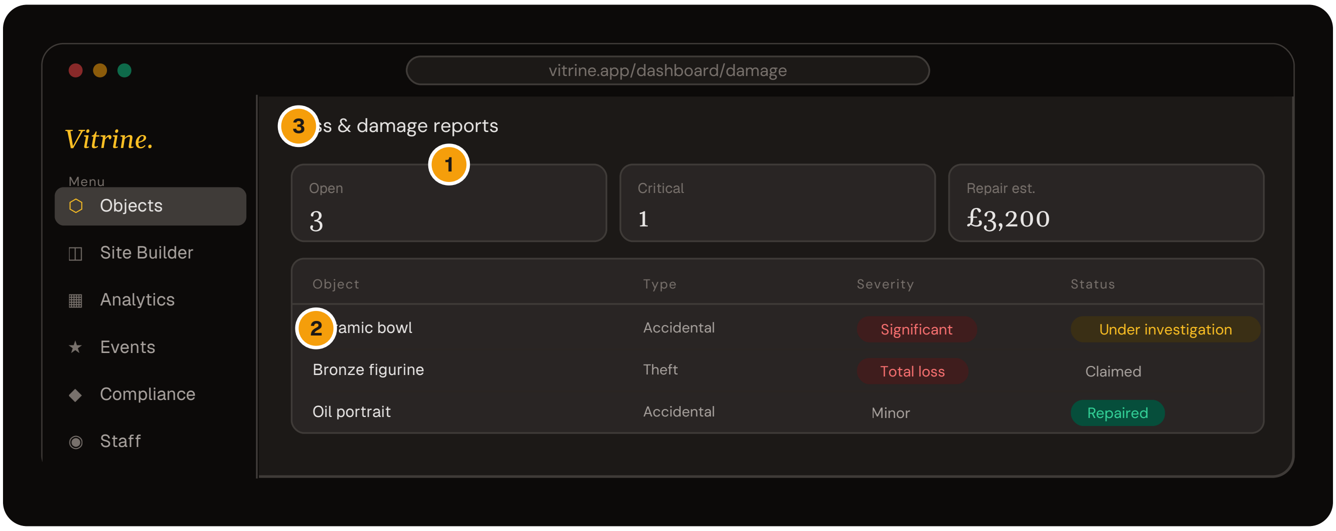

Fig. 20 Loss & damage (Procedure 16) — incidents by severity, with police reference and claim outcome.

1. Open reports, critical cases and the running repair estimate at a glance.
2. Reports capture incident/discovery dates, severity, police report reference and the insurance-claim outcome. Filed from an object's Damage tab.
3. Damage and loss is tracked for governance — including whether the governing body was notified.

1. From an object's **Damage** tab, file a report: incident/discovery dates, type, severity, repair estimate and police reference.
2. Track it through Open → Under investigation → Repaired/Claimed/Closed, and flag when the governing body was notified.

Valuation

Current values for insurance and board reporting, with a live total collection value.

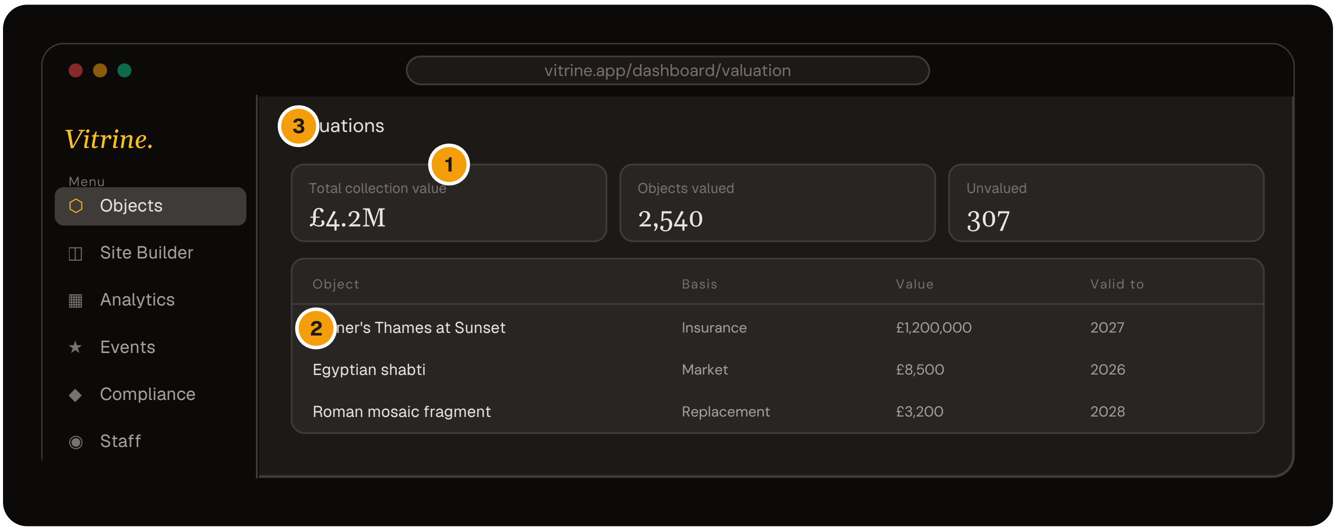

Fig. 21 Valuation (Procedure 13) — every current valuation, plus total value and unvalued count.

1. Aggregates the total collection value and counts how many objects still lack a valuation.
2. Valuations record valuer, basis (insurance / market / replacement), amount, currency and an expiry date. Added from an object's Valuation tab.
3. A central view of every current valuation, useful for insurance and board reporting.

1. From an object's **Valuation** tab, add a valuation: valuer, basis (insurance / market / replacement), amount, currency and expiry.
2. The **Objects → Valuation** register aggregates the whole collection's value and lists what's still unvalued.

Insurance & indemnity

Policies, what they cover, and which objects they protect.

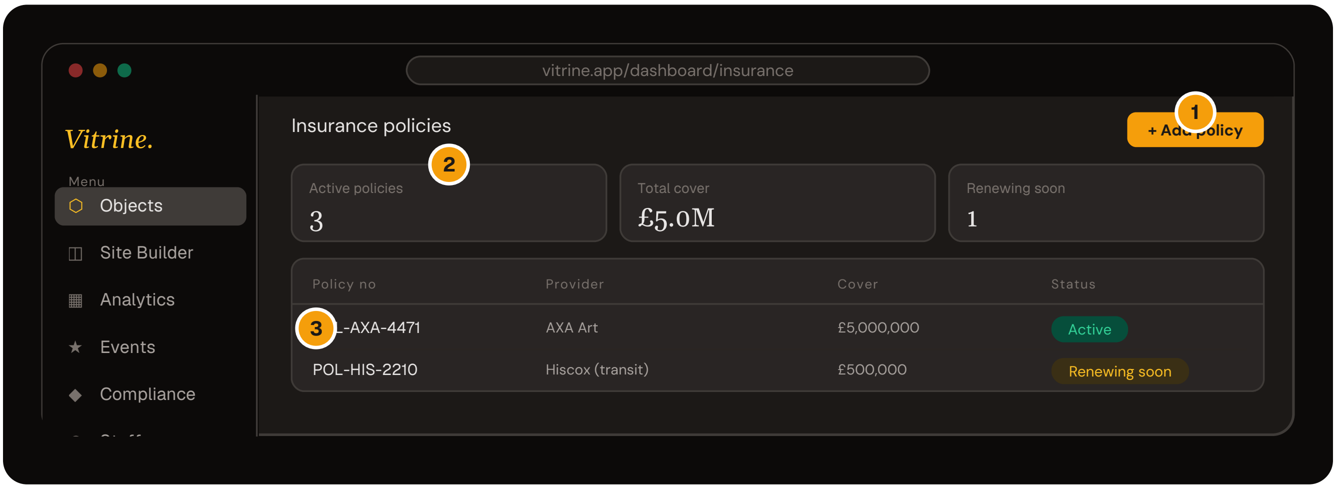

Fig. 22 Insurance (Procedure 14) — policies with coverage, renewals and linked objects.

1. + Add policy — record provider, coverage amount, excess, dates and what it covers (loans, transit, exhibitions).
2. Track active policies, total cover and any renewals coming up.
3. Expand a policy to link the specific objects it covers, and attach the certificate as a document.

1. Open **Objects → Insurance** → **+ Add policy**: provider, coverage amount, excess, dates and what it covers (loans, transit, exhibitions).
2. Expand a policy to link the specific objects it covers, and attach the certificate. Renewals due soon are flagged.

Risk management

Identify, rate and mitigate risks to objects or the whole collection.

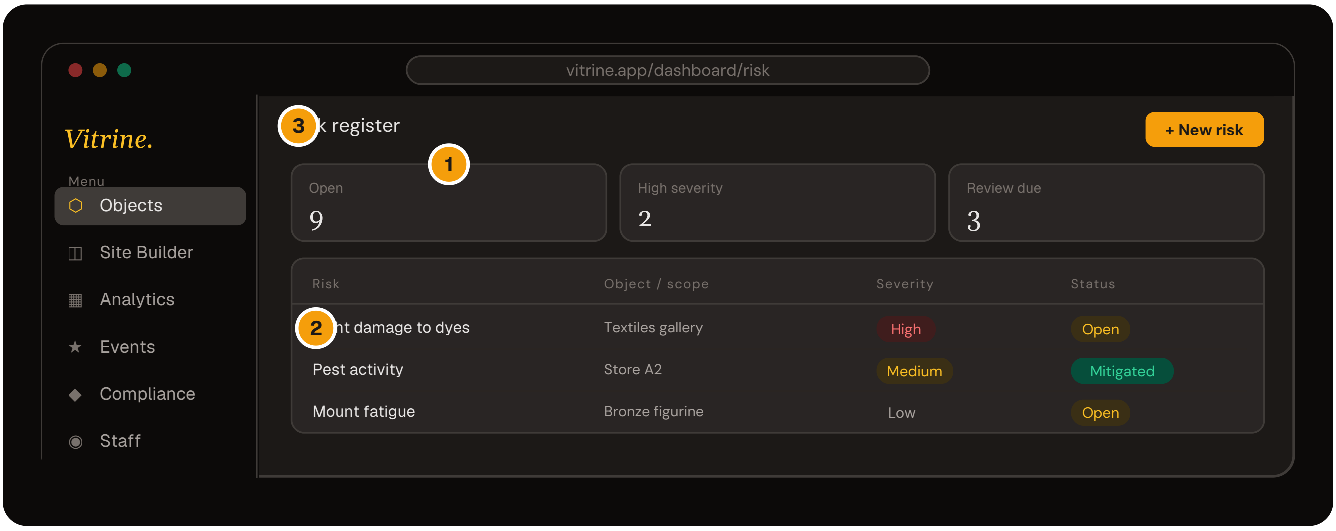

Fig. 23 Risk register — severity, mitigation and review dates for preventive conservation and security.

1. Open risks, high-severity items and any risks due for review.
2. Risks capture severity, mitigation and a review date; raise them against a specific object or the whole collection.
3. The register keeps preventive-conservation and security risks visible and actively managed.

1. Open **Objects → Risk** → **+ New risk** (or raise one against a specific object).
2. Set severity and mitigation, and a review date; track each risk through Open → Mitigated → Closed.

Emergency planning

Be ready for fire, flood or theft — with salvage priorities and incident logging.

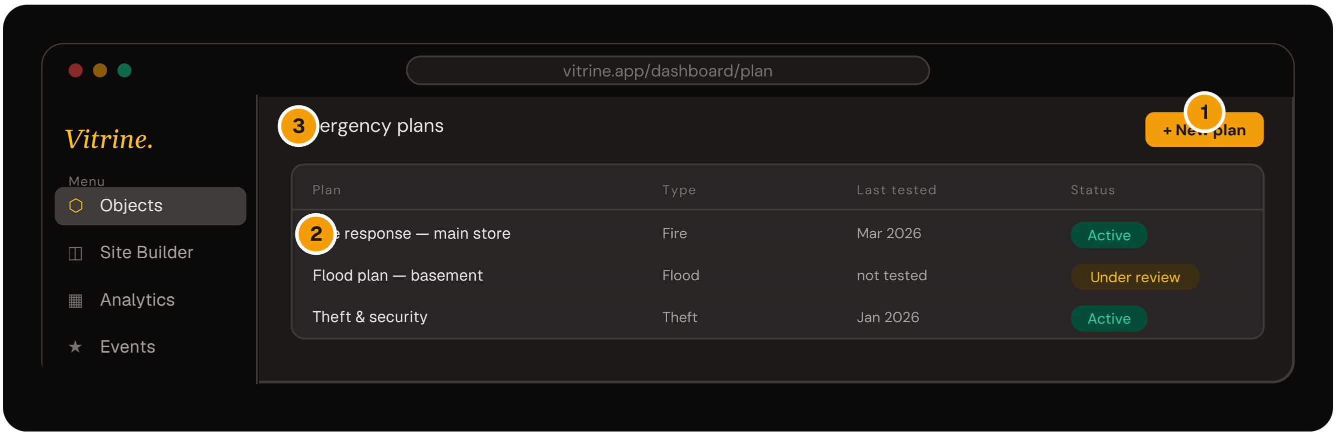

Fig. 24 Emergency planning (Procedure 15) — response plans with ranked salvage priorities.

1. + New plan — write a response plan with contacts and the location of salvage equipment.
2. Each plan holds a ranked salvage-priority list — which objects to rescue first if the worst happens.
3. A companion Incident register (/emergency) logs real events and the objects they affected.

1. Open **Objects → Plan** → **+ New plan**: plan type, contacts and salvage-equipment location.
2. Add a ranked **salvage-priority** list — which objects to rescue first.
3. Log real incidents and the objects they affected in the companion **Emergency** (incident) register.

Use of collections

Manage research, exhibition, education and photography requests through an approval workflow.

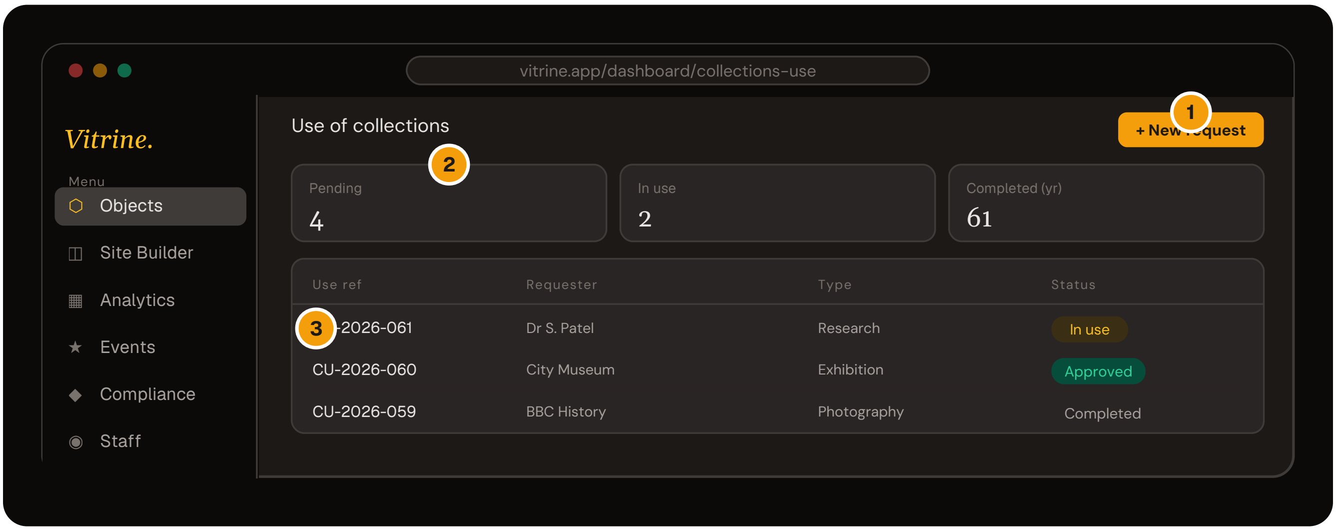

Fig. 25 Use of collections (Procedure 10) — requests from Pending through to Completed.

1. + New request — log a request to use an object for research, exhibition, education or photography.
2. See pending, in-use and completed requests at a glance.
3. Each request runs an approval workflow (Pending → Approved → In use → Completed) and can link to a reproduction request.

1. Open **Objects → Collections use** → **+ New request**: requester, organisation, type and purpose.
2. Approve and progress it (Pending → Approved → In use → Completed); link a reproduction request where relevant.

Reproduction rights

Decide and record requests to reproduce images of an object, checked against its copyright status.

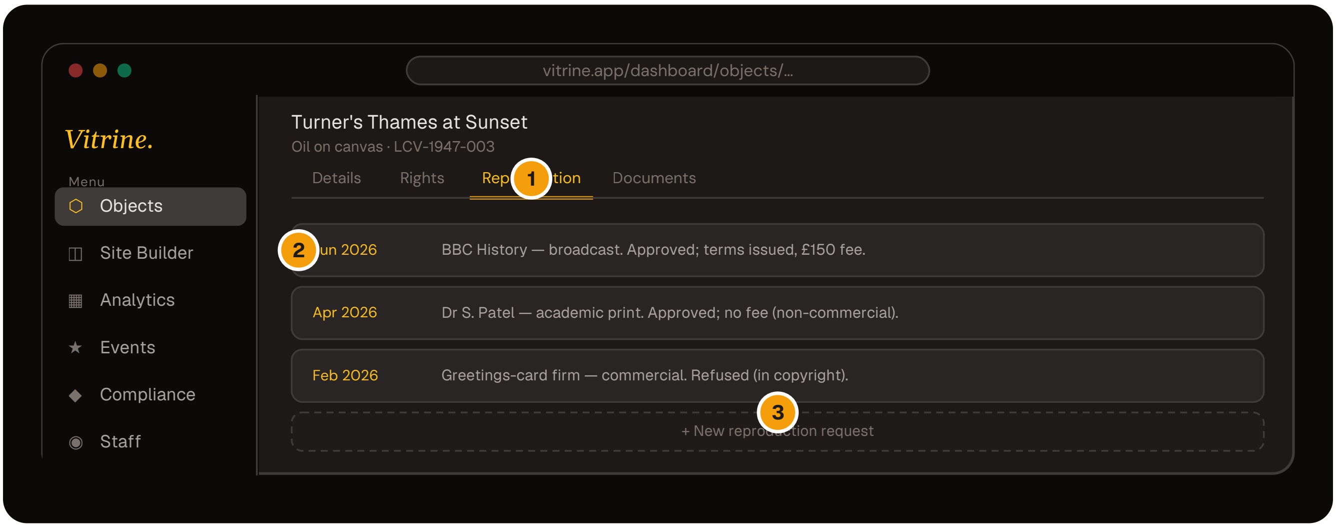

Fig. 26 Reproduction rights (Procedure 19) — requests and decisions on the object's Reproduction tab.

1. Reproduction requests sit alongside the object's Rights records.
2. Each request tracks requester, intended use, the decision (Approved / Refused / Pending), terms and any fee.
3. + New reproduction request — decisions are checked against the object's recorded copyright status.

1. On an object's **Reproduction** tab, click **+ New reproduction request**.
2. Record requester, intended use, the decision (Approved / Refused / Pending), terms issued and any fee.

Collections review

Formal, mission-aligned reviews of parts of the collection — the basis for responsible rationalisation.

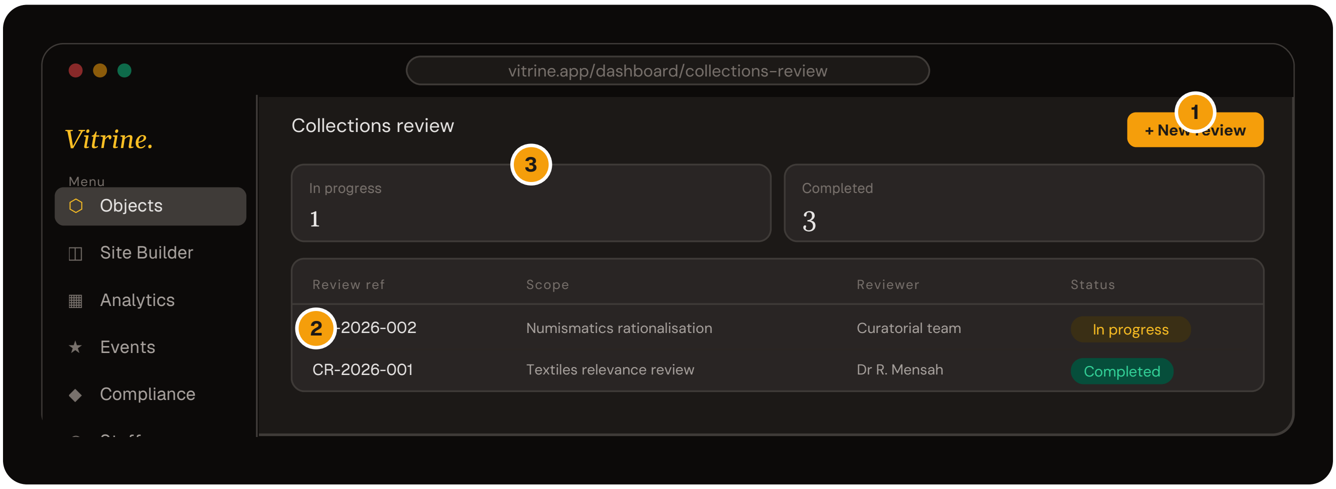

Fig. 27 Collections review (Procedure 20) — scope, criteria and disposal recommendations.

1. + New review — define scope and criteria for a formal collections review against your mission.
2. Reviews record how many objects were assessed and how many are recommended for disposal, with governance reporting.
3. Track reviews in progress and completed.

1. Open **Objects → Collections review** → **+ New review**: scope, criteria and reviewer.
2. Record objects assessed and any recommended for disposal, with governing-body reporting.

Disposal & deaccession

A governed workflow for removing objects from the collection, with full justification.

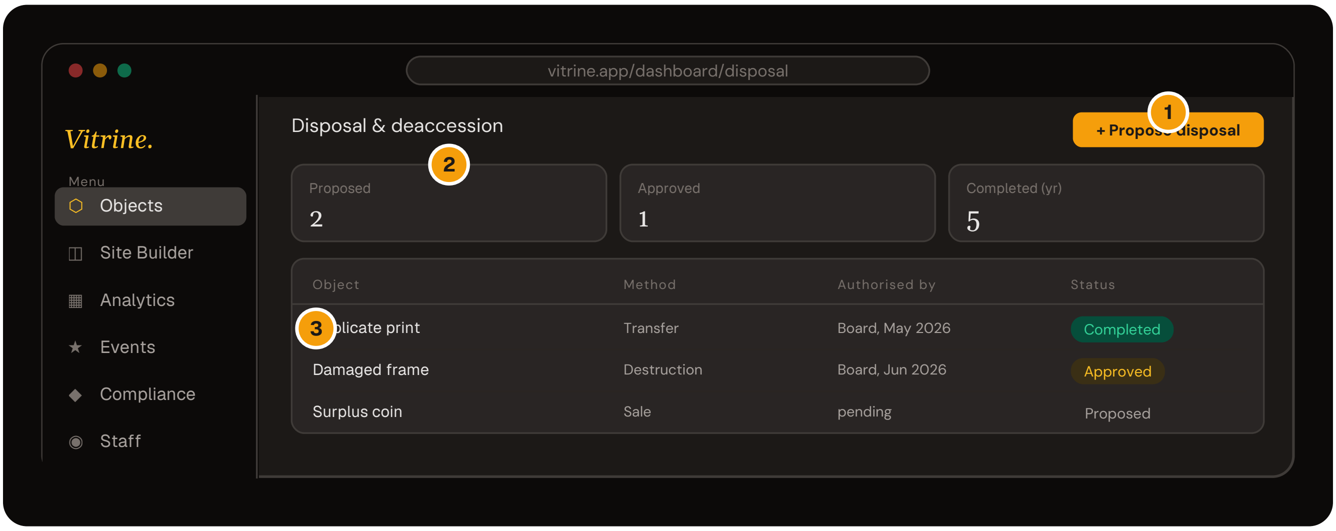

Fig. 28 Disposal (Procedure 17) — Proposed → Approved → Completed, with governance sign-off.

1. + Propose disposal — start the formal workflow: method, reason, justification and governing-body approval.
2. Watch items move through Proposed → Approved → Completed.
3. Completing a disposal sets the object's status to Deaccessioned. A deaccession-protected flag guards against accidental disposal.

1. Open **Objects → Disposal** → **+ Propose disposal**: method, reason and detailed justification.
2. Record governing-body approval, then complete it — the object's status becomes **Deaccessioned**.

◆ **Note.** A **deaccession-protected** flag on important objects prevents accidental disposal. Documentation planning (Procedure 9) lives in your dashboard settings rather than a register page.

Chapter 11

Everyday tools

Wishlist, private share links, trash, export and more.

Beyond the formal procedures, a handful of tools make day-to-day work easier and safer.

Wishlist / wanted items `Community & Hobbyist`

Track objects you'd like to acquire — and turn them into real records when you do.

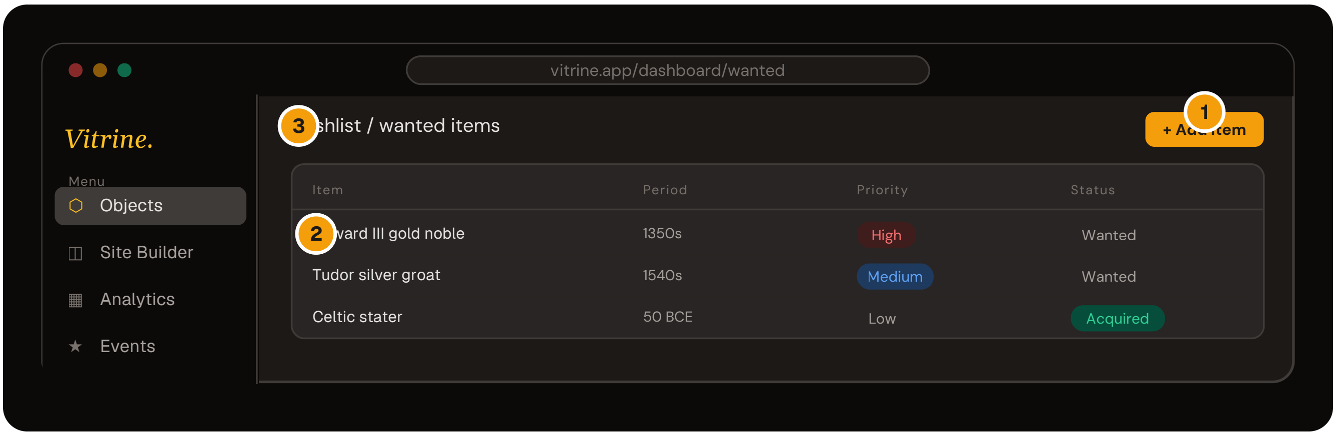

Fig. 29 The wishlist — desired acquisitions with priority, convertible to objects, optionally public.

1. + Add item — note something you'd like to acquire, with a priority and free-text notes.
2. When you get one, click Mark acquired and it converts straight into a new catalogue object.
3. Optional: publish your wishlist on your public site so donors and sellers can see what you're seeking. (Community & Hobbyist.)

1. Open **Objects → Wishlist** → **+ Add item**: title, period, priority and notes.
2. When you acquire one, click **Mark acquired** to convert it into a new catalogue object.
3. Optionally publish the wishlist on your public site so donors and sellers can see what you're seeking.

Private share links

Give insurers, trustees or grant assessors a private view of your collection without creating logins.

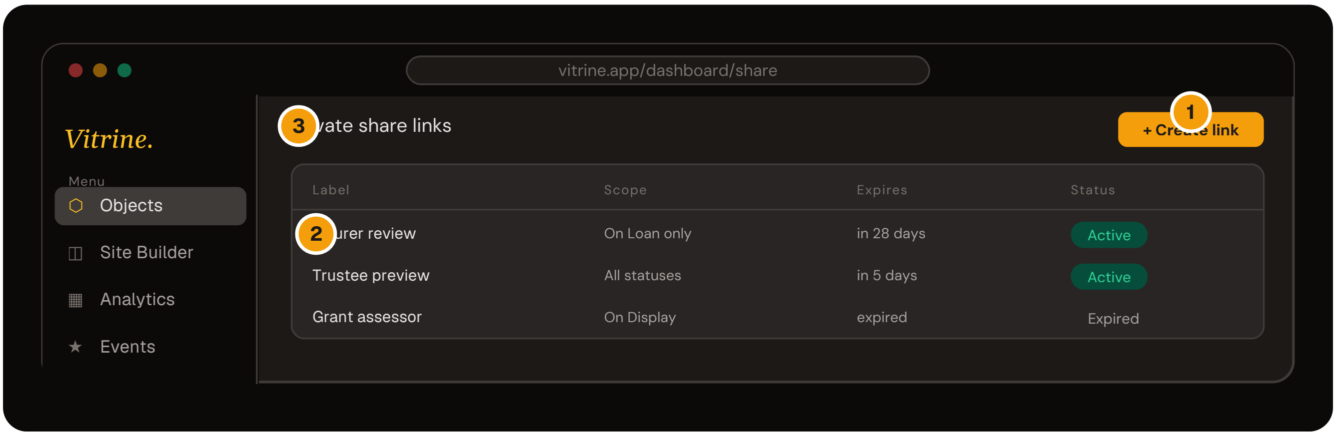

Fig. 30 Share links — passcode-protected, time-limited, scoped views of your collection.

1. + Create link — generate a passcode-protected link to a private view of your collection without giving anyone a login.
2. Set an expiry (1/7/30/90 days or never), an optional view limit, and scope it to certain object statuses. Revoke any link instantly.
3. Great for insurers, trustees and grant assessors. Community includes 1 active link; paid plans, unlimited.

1. Open **Objects → Share** → **+ Create link**. Set a passcode (4+ characters, shared separately).
2. Choose an expiry (1/7/30/90 days or never), an optional view limit, and scope it to certain object statuses.
3. Send the link and passcode; **revoke** it any time. Community includes 1 active link; paid plans, unlimited.

Trash & restore

Deleting an object isn't instantly permanent — there's a safety net.

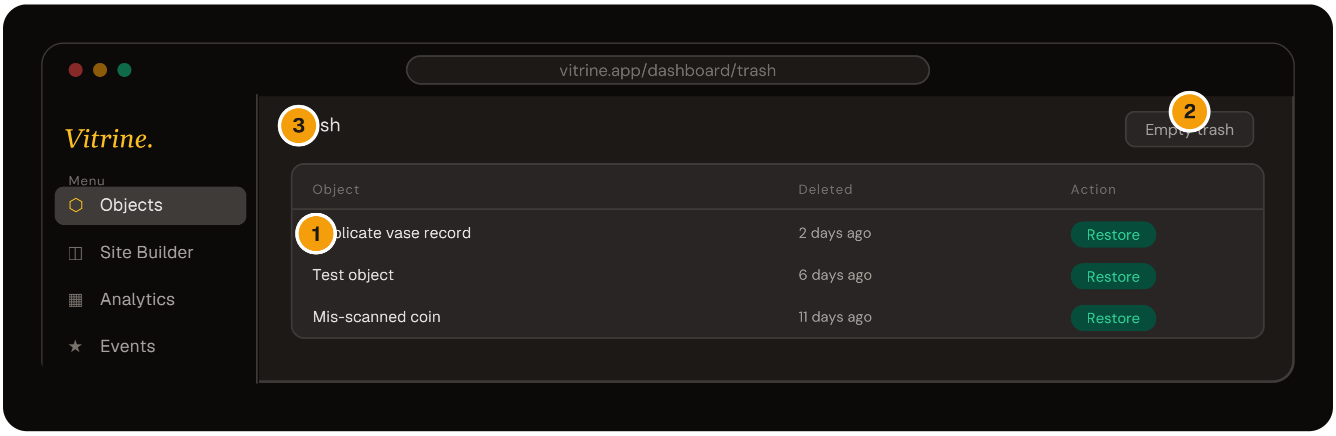

Fig. 31 Trash — restore a deleted object, or permanently empty the bin when you're sure.

1. Deleted objects land here first. Click Restore to bring one back (subject to your plan's object limit).
2. Empty trash — permanently delete everything here. Permanent deletion can't be undone.
3. A safety net between hiding/deleting and losing a record for good.

1. Deleted objects move to **Objects → Trash**. Click **Restore** to bring one back (subject to your plan's object limit).
2. Click **Empty trash** to permanently delete — this can't be undone.

CSV export & duplicate detection

1. **CSV export:** most registers (objects, locations, audit, analytics) have an **Export CSV** button for spreadsheets, reports and backups.
2. **Duplicate detection:** Vitrine flags likely duplicate objects (matching titles/makers) so you can merge or clean up — useful after a bulk import.

Chapter 12

Settings, plans & billing

Your account, subscription, storage and museum details.

Settings holds your profile, security, plan, billing history, document storage and museum details. Reach it via **Settings** at the bottom of the sidebar.

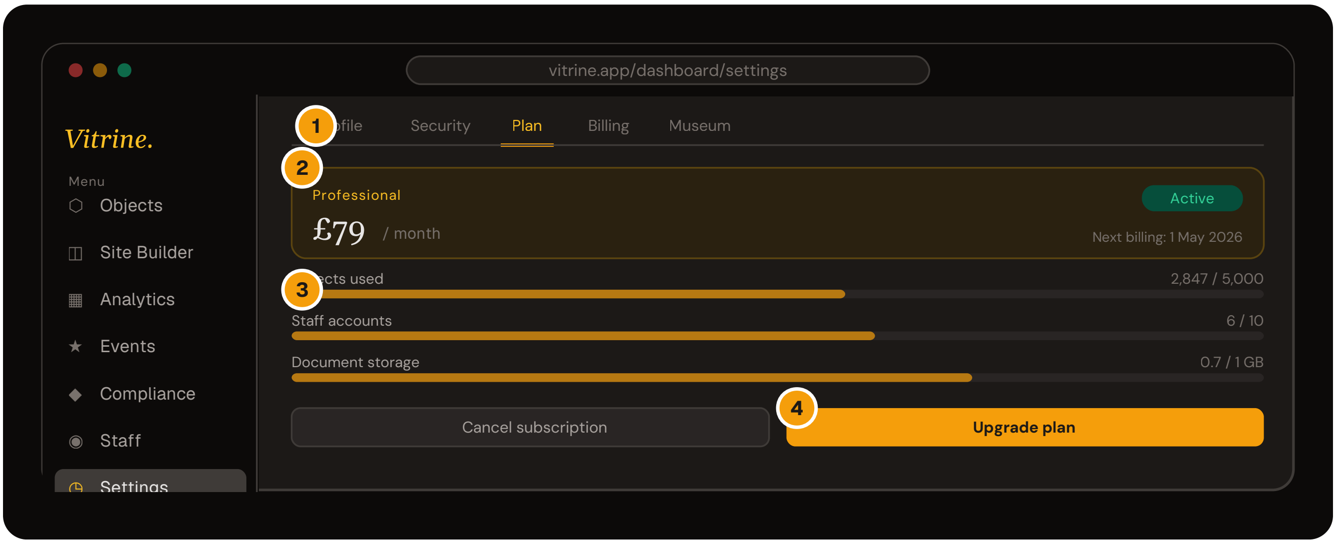

Fig. 32 The Plan tab. Your tier, usage bars, and the buttons to upgrade, downgrade or cancel.

1. Settings tabs — Profile (name/email), Security (password), Plan, Billing (download invoices) and Museum (name & details).
2. Current plan — your tier, monthly price, status and next billing date.
3. Usage — how much of your object, staff and document-storage allowance you've used. Upgrade before you hit a limit.
4. Cancel / Upgrade — change plan any time. Cancelling keeps access until the period ends, then reverts to free Community; nothing is deleted.

Account & security

1. **Profile:** Settings opens to Profile — edit Name or Email, then **Save changes**. Changing email sends a verification link to the new address; the old one stays active until you click it.
2. **Password:** Settings → **Security** → **Change password**; enter current then new (min 8 characters). Other sessions are signed out.
3. **Museum details:** Settings → **Museum** — the name here appears on your site and in every automated email.

Plan, usage & billing

1. **See plan & usage:** Settings → **Plan** — current tier, price, next billing date, and usage bars for objects, staff and document storage.

2. **Upgrade/downgrade:** click **Upgrade**, choose a plan (you're billed pro-rata for the rest of the period). Enterprise opens a contact prompt instead of a payment form.
3. **Invoices:** Settings → **Billing** — click **Download** beside any charge for a PDF.
4. **Document storage:** the Plan tab shows usage vs. allowance (1 GB Professional, 10 GB Institution, unlimited Enterprise). Free space by deleting files from an object's Documents tab, or upgrade.

Cancelling & deleting

1. **Cancel subscription:** Settings → Plan → **Cancel subscription** → confirm. You keep paid access until the period ends, then revert to free Community. Nothing is deleted.
2. **Delete account:** Settings → Account → bottom of page → **Delete account**, type your museum name to confirm, then **Confirm deletion**.

> ▲ **Important.** Two reversions to know: dropping below a plan that supports fewer objects lets you keep all existing records but blocks new ones until you're under the limit; and reverting to Community (single account) signs out extra staff until you re-upgrade. **Account deletion is irreversible** — everything is erased permanently.

Chapter 13

Power tips & shortcuts

Work faster: command palette, scanning, Learn mode, Discover.

A few features that make Vitrine fast to live in — well worth learning early.

Command palette

The quickest way to get anywhere or find anything.

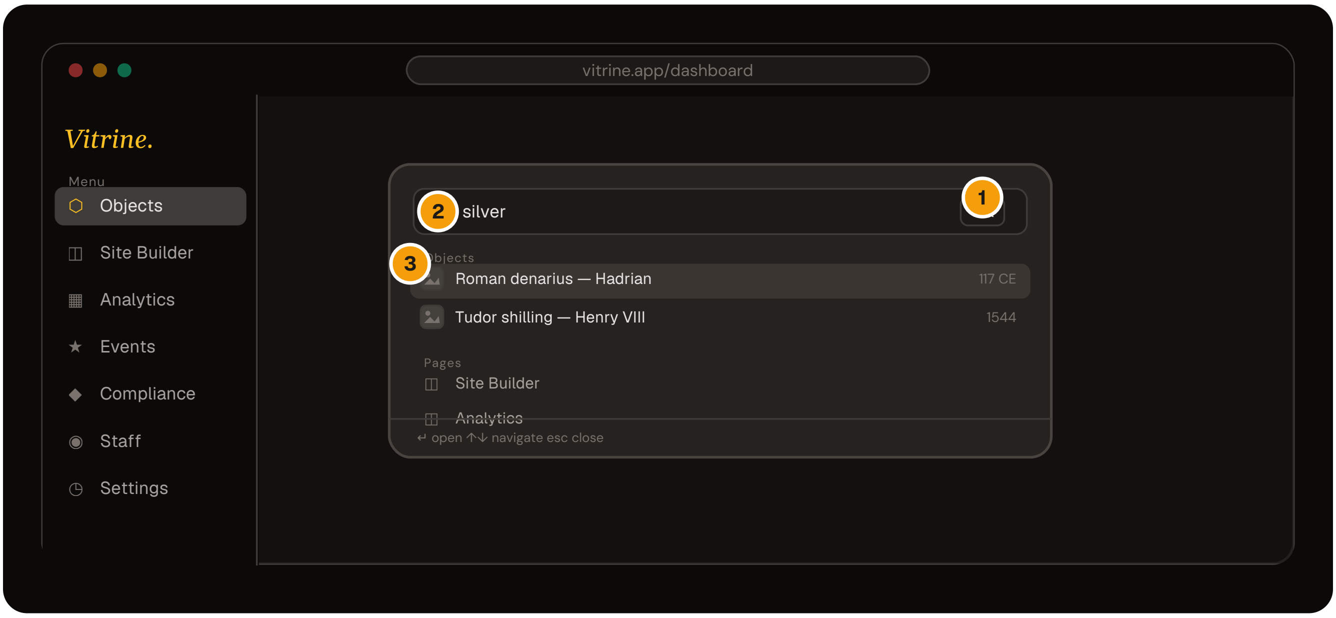

Fig. 33 The command palette — search every page and object from one box.

1. Open from anywhere with ⌘K (Mac) or Ctrl+K (Windows) — the fastest way to move around Vitrine.
2. Type to search both your objects (by title, maker or accession number) and the dashboard's pages at once.
3. Use ↑ ↓ to highlight a result and ↵ to jump straight to it; esc closes. No mouse needed.

1. Press ⌘K (Mac) or Ctrl+K (Windows) anywhere in the dashboard.
2. Type to search your objects (title, maker, accession number) and the dashboard's pages at once.
3. Use ↑ ↓ to highlight a result and ↵ to open it; esc closes.

Keyboard shortcuts

Fig. 34 Press ? to see the full shortcut cheat-sheet at any time.

1 Press ? at any time to open this cheat-sheet of keyboard shortcuts.

2 Two-key 'G then …' chords jump between sections (G O = Objects, G E = Events, and so on); N starts a new entry.

Press ? for the full list. Highlights: ⌘K search, N new entry, and two-key 'G then …' chords to jump between sections (G O Objects, G E Events, G L Loans, G S Site Builder, G P Plan).

Barcode scanning

Speed up intake and stock-takes with your device camera.

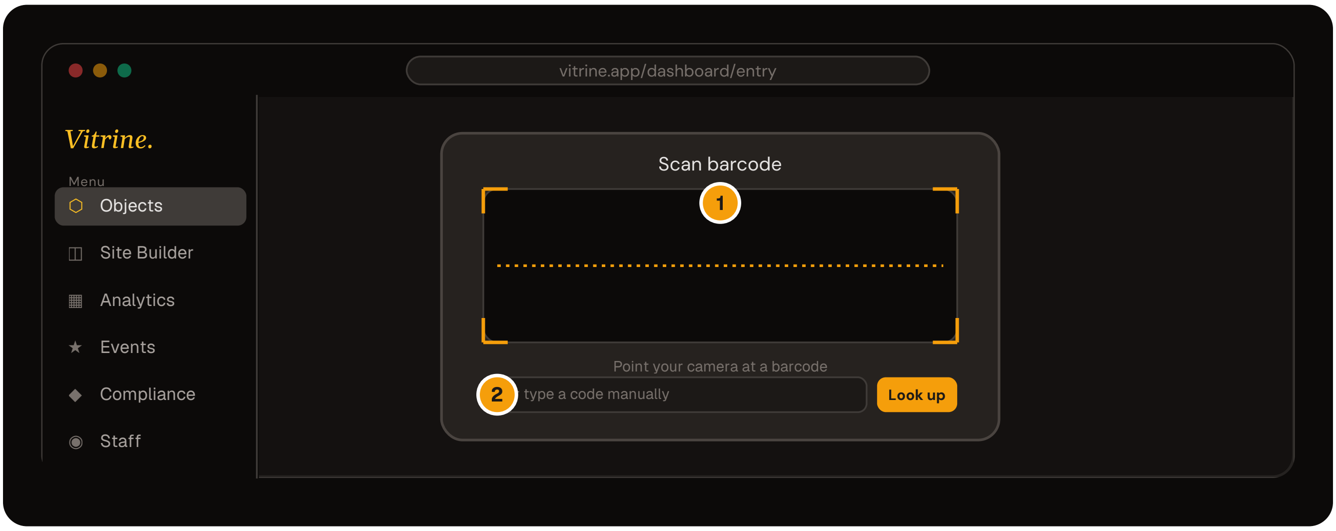

Fig. 35 The barcode scanner — auto-detects the format, with manual entry as a fallback.

1 From an entry record (or the Entry page) tap Scan barcode to use your phone or tablet camera — it auto-detects the format and looks the object up.

2 No camera, or prefer typing? Enter the code by hand and click Look up. Either way it pre-fills or finds the matching record.

1. On the **Entry** page (or an entry record) tap **Scan barcode** and point your phone/tablet at the code.
2. It looks the object up or pre-fills a new entry. No camera? Type the code and click **Look up**.

Learn mode

A built-in tutor for everyone on your team — especially new volunteers.

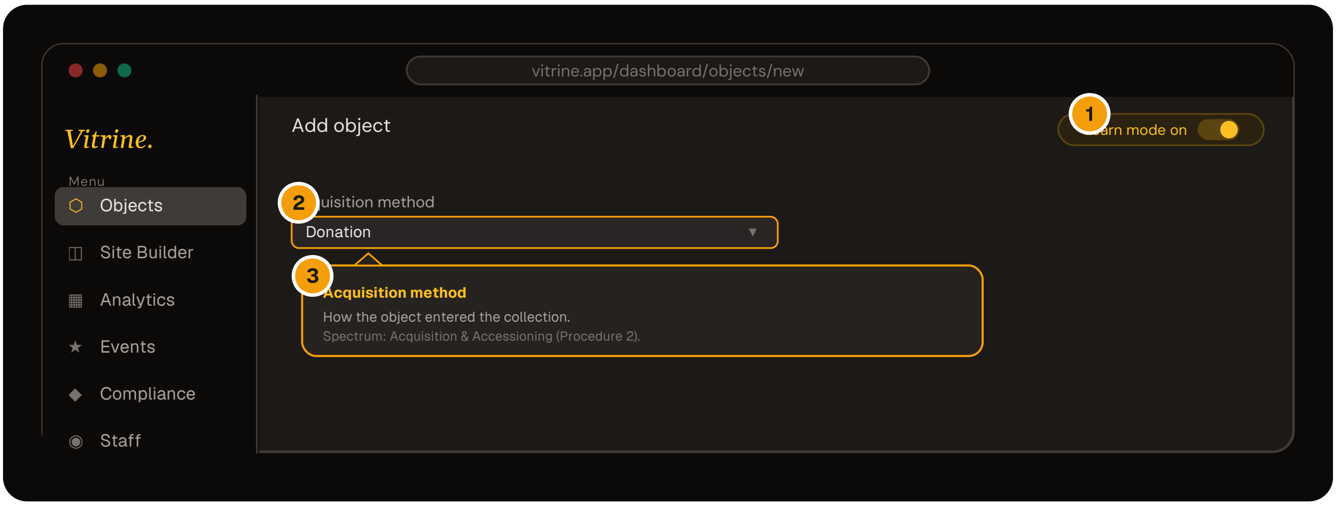

Fig. 36 Learn mode — hover any field label for an explanation and its Spectrum relevance.

1. Turn on Learn mode from the sidebar (or with the toggle shown). Your preference is remembered.
2. With it on, every form field label across the dashboard becomes interactive.
3. Hover a label to see a plain-English explanation of the field and which Spectrum procedure it supports — like a built-in tutor while you catalogue.

1. Toggle **Learn mode** on from the sidebar (your choice is remembered).
2. Hover any form-field label to see what it's for and which Spectrum procedure it supports — guidance exactly where you need it.

Vitrine Discover

Opt in to a free public directory and reach new visitors.

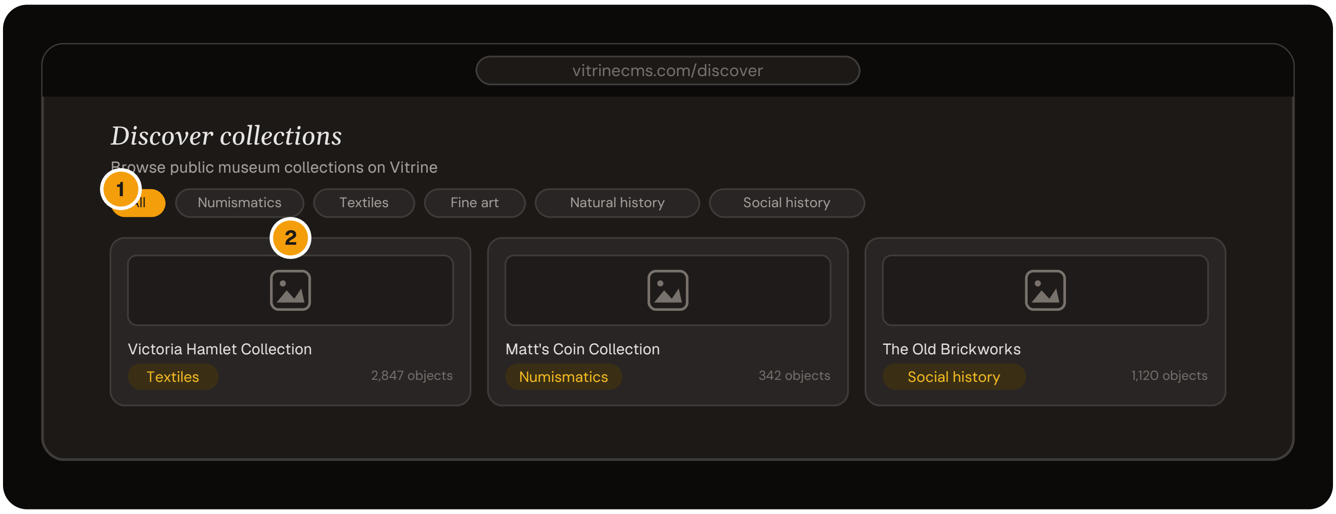

Fig. 37 Vitrine Discover — opted-in collections, browsable by category at vitrinecms.com/discover.

1. Discover is Vitrine's public directory of opted-in collections. Turn it on from your dashboard (set a collection category) and your museum appears here for the public to find — a free way to reach new visitors.

2. Visitors filter by category and click any collection to open its public site. Every plan, including Community, can opt in.

1. From your dashboard, mark your collection as discoverable and pick a category.
2. Your museum then appears in the public Discover directory, where visitors browse by category and click through to your site. Available on every plan.

Dark mode, map & timeline

1. **Theme:** switch between System, Light and Dark from the sidebar; your preference is saved per device.
2. **Map & timeline views:** where objects have location or date data, visualise the collection geographically on a map and chronologically on a timeline.

Chapter 14

Quick reference

Statuses, a first-week checklist, FAQ and where to get help.

Status & public visibility

Status	On public site?	Typical use
On Display	**Yes**	Anything you want the public to browse
In Storage	No	Catalogued but not currently shown
On Loan	No	At another institution (pair with a Loan record)
Restoration	No	Undergoing conservation work
Deaccessioned	No	Left the collection; kept in your archive

A sensible first-week checklist

1. Create your account and choose a memorable URL slug.
2. Add 5–10 of your best objects with a good photo each, set to On Display.
3. In Site Builder: upload your logo, set your accent colour and write a tagline.
4. Feature your 3–6 strongest objects on the homepage.
5. Open your live site, check it on your phone, and share the URL.
6. (Professional+) Fill in your Visit page, invite staff, and start your compliance records.

Where things live

I want to…	Go to
Add or edit an object	Objects → + Add object / click a title
Change my site's look	Site Builder → Appearance
Edit homepage text & featured objects	Site Builder → Content
Set opening hours & admission	Site Builder → Visit info
See visitor stats	Analytics
Create an event / take bookings	Events → + New event
Invite a colleague	Staff → + Invite
Check documentation gaps	Compliance
Change plan or download invoices	Settings → Plan / Billing

Frequently asked questions

Is my data backed up?
Yes — Vitrine runs on managed cloud infrastructure with regular backups. Your records and images are stored securely; deleting an object or account, however, is permanent and not recoverable by support.

Can visitors see objects that aren't On Display?
No. Only objects with the On Display status appear publicly. Everything else is private to you and your staff.

Do I need a website or domain already?
No. Every account includes a free, fast public site at yourslug.vitrine.app the moment you sign up. Custom domains are on the roadmap.

How do paid ticket payouts reach me?
Through Stripe Connect, straight to your bank account. Vitrine takes a 2% platform fee; standard Stripe fees also apply. Free events are free.

What happens to my data if I downgrade?
Nothing is deleted. You keep all records and images but lose access to higher-tier features and can't add new objects beyond the lower plan's limit until you're back under it.

How do I get help?
Email hello@vitrine.app, or browse the in-app guides at vitrinecms.com/guide (Essentials and Professional editions).

Need a hand? Email `hello@vitrine.app` or read the in-app guides at `vitrinecms.com/guide`. Welcome aboard — we can't wait to see your collection online.