Version 4.50 the Auto-Categorisation Update
Including:

1. Auto-categorisation with Thema Codes
2. 'No purchase order' goods-in process streamlined
3. Easy reprint of customer slips
4. Display of Gardners promotional, rights restricted and ISBN change data
5. New method for email notification
6. Estimated cost price of an order awaiting despatch
7. Stock on hand value displayed in order detail
8. Reorder from sales line deletion
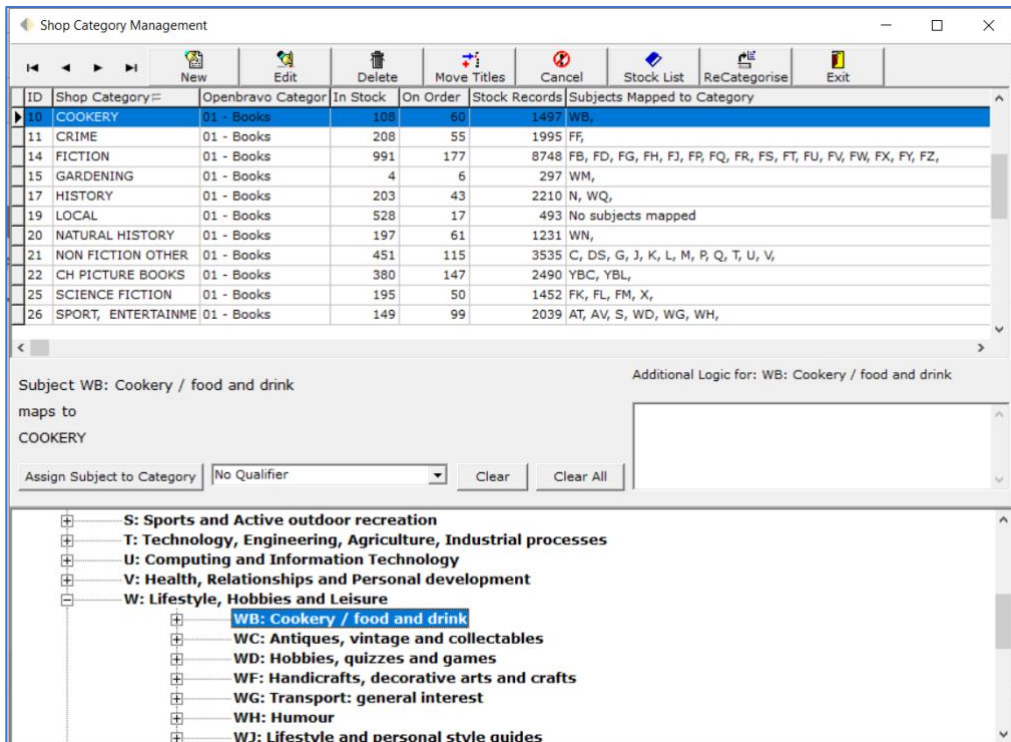9. Mobile phone format error checking
10. Old order clean up

For information and guidance on previous releases, notes are available on:
https://www.batch.co.uk/web/bertline-BatchLine/bertline-BatchLine-pos
We also have a new dedicated YouTube Channel and short videos about how to use the new version
https://www.youtube.com/channel/UCiNvzATEjSfT11uDbNOKDQQ

1 Auto-categorisation with Thema Codes

Auto-categorisation is a function that we believe will be a major improvement in ease of use for BatchLine users. It will take about 15 – 30 minutes to set up. Once set up:

- Categorise any new or existing title that is in the undefined category.
- Auto-categorisation happens when ordering, goods in or adding to an ISBN list.

- The new ability to auto-categorise provides us with a new seamless goods in process for 'No Purchase Order (No Po) goods in – see later in this document.
- Provide a means of bulk updating titles that are in the undefined category or bulk moving from one category to another.
- Categories can match not just with Thema codes but also Age Qualifiers meaning it is possible to link children's fiction (YF) with more than one shop category for example Children's 0-5 and Children's 6-10, etc.

How To:

In the graphic above, Thema code WB which equates to 'Cookery/food and drink' in the bottom of the screen is linked to the Shop Category '*Cookery*'. This is done simply by highlighting the Thema code and the Shop Category and clicking on @assign Subject to Category'. Once done any title with a Thema code of WB will be automatically linked to Shop Category 'Cookery'.

By clicking on the "+" sign next to a Thema code, distinct codes can be selected to refine even further. For example, if there is a requirement to auto match against a Wine Shop Category there is a sub code of '*Cookery/food and drink*' which is WBX which covers alcoholic and non-alcoholic drinks that further sub-divides into alcoholic and non-alcoholic beverages.

Readership codes are selected via the 'Assign Subject to Category' plus selecting a Readership Code from the drop down next to the button:
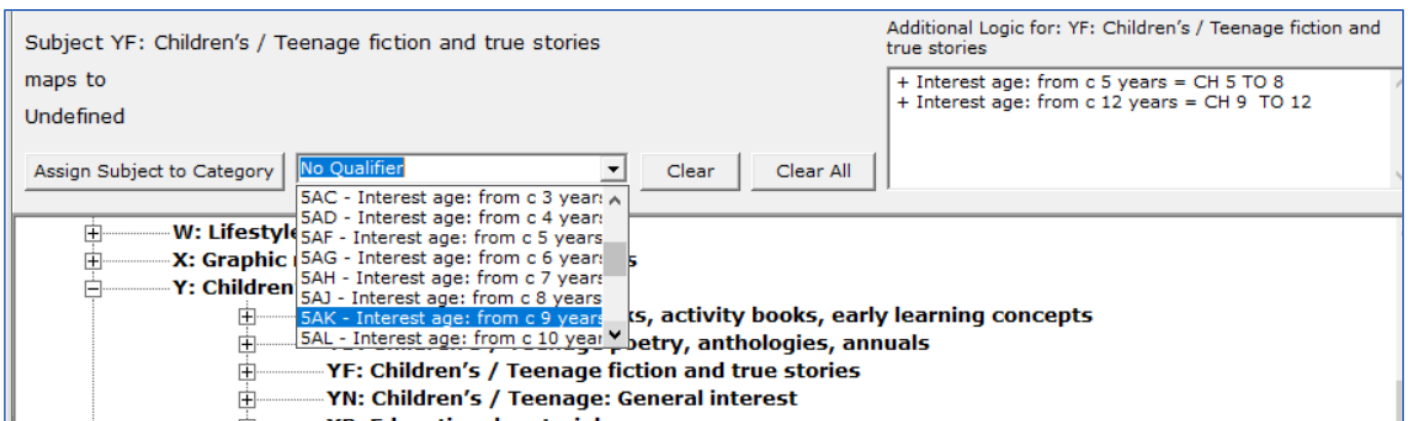
For a more in depth look at auto-categorisation and the subject of Thema codes please look at the BatchLine You Tube Channel https://www.youtube.com/channel/UCiNvzATEjSfT11uDbNOKDQQ where there are a number of short videos covering background and usage.

The following is a link to the Thema Code Website for in-depth information on the subject
https://ns.editeur.org/thema/en

2 Changes to Goods In

Now we are able to auto-categorise it became quite clear to us that it was no longer necessary to pop up the NO PO warning commonly seen in Scanned Goods In when BatchLine is not able to match an order line. This version includes two big changes to the process.

No Purchase Order

When scanning or importing into Scanned Goods In, whenever a title scanned is not outstanding against a Purchase Order in the past BatchLine would have popped up a No PO warning, resulting in the user having to open a window, select a category and then update to record the title. Now we do it differently. The category is automatically updated but instead of the No PO box previously shown we add 'AutoNoPo' to the line. As can be seen above, the two lines have been found and the remainder are 'AutoNoPo'. Those lines are highlighted in red to flag the 'No PO' status of the lines to draw attention to that status in case this is a genuine mistake.

The significance of this is that now we can deal with orders such as 'Subs' and 'Rep Orders' that have traditionally been placed outside of the system and have always caused extra work. These can be brought into stock very easily.

If there is an invoice for the order, this can also be processed using the 'Import Lines' option which will pull in an electronic invoice and process it either as a found invoice or as 'No PO' invoice.

Everything about processing the invoice once scanned or imported is the same as before.

Mismatches

We expect that importing invoice lines will become the preferred and more accurate method of dealing with an electronic invoice, since this method will not mismatch as so often happens when processing an invoice with changed line references such as is seen with a Gardners Dues release.

3 Reprinting Slips
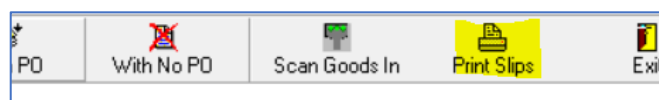
Another important change to Goods In is the way that Customer Slips are dealt with. In the past the process of printing slips has always ended in 'Do you wish to delete the printed slips'. For both our customers and from a support perspective this has been a problem.

This version no longer prompts you to delete slips. Instead, if for any reason the slips fail to print there is a new button in Goods In called 'Reprint Slips'. This permits slips to be reprinted for any date including today's date.

4 Gardners Promotions, Rights Restricted and ISBN Changes

This version of BatchLine is now able to display:

Gardners Promotions

There is a new field in Title Search called Promo End which gives the end date for a promotion, and the DISC% field displays the promotional discount.

Gardners Rights Restricted

A second new field display whether a title is rights restricted. This the 'RR' field, which has a red background and a 'Y' if a title is rights restricted. Further information on individual titles can be found on the Gardners website.

Rights Restricted Country Settings

On the address tab of System Config (Back Office\Maintenance) there is a new Rights Restricted Region which, once selected, will make sure RR information is pertinent your location.
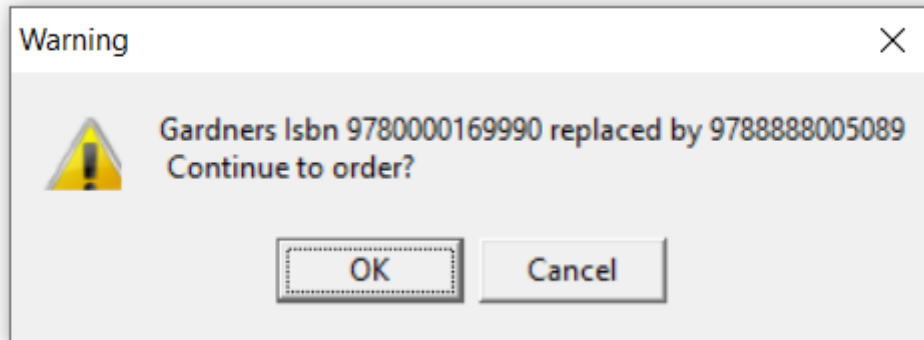
When an ISBN is selected from ordering in Title Search a message will pop up to indicate that a title has been replaced by a different EAN.

Note: Firm Sale

At this time, we are unable to display full firm sale data due to the very large size of that data and the means Gardners have to supply us with that data. Our best advice is to check whenever a discount is short.

5 Email Customer Notifications

A lot of BatchLine customers may have found that over time the ability to send emails directly from the system has become more and more difficult. We are not sure why a perfectly working system will move from working to not working without any changes, but we believe it comes about by security setting changes by service providers. Therefore, we have added a new email method which, at this time, is only available for notifications but soon hope to make available for other uses. In order to use this notification method please select the 'SendGrid' option as shown in the above diagram as well as From Name, From Address, Reply to Address, Email Subject (should remain static) and the email message you would like to send.

6 Order Value Option

Date	Supplier	PO Reference	Dues	Lines	Books	Value	Estimated Cost	Supplier Discount	Min-Ord	M	Ack	S
19/07/2021	ALB	ORDER77709	N	1	1	9.99	9.99	0.00	0.00	P		
14/07/2021	GARD	ORDER77685	Y	2	2	40.00	26.00	35.00	0.00	B		
14/07/2021	GARD	ORDER77684		0	0	0.00	0.00	35.00	0.00			
13/07/2021	PENG	ORDER77682	Y	1	1	10.99	10.99	0.00	0.01	B		
12/07/2021	GBS	ORDER77651	Y	7	11	107.90	67.44	37.50	0.00	B		
12/07/2021	HARCOL	ORDER77666	Y	2	2	13.98	8.44	39.60	182.00	B		
12/07/2021	MACMIL	ORDER77667	Y	4	4	53.97	31.84	41.00	182.00	B		
10/07/2021	HACH	ORDER77639	Y	12	12	154.91	100.69	35.00	0.00	B	A	
08/07/2021	TURN	ORDER77509	Y	1	1	19.99	19.99	0.00	0.00	M	F	
30/06/2021	JWILEY	ORDER77133	Y	5	5	48.95	48.95	0.00	0.01	M		
08/05/2021	FSC	ORDER75831	Y	13	14	56.00	56.00	0.00	0.00	P		

Above is displayed a standard 'Orders Awaiting Despatch Screen'. This version displays an estimated cost of the order as well as the standard 'RRP' (Value) field and the supplier discount. The discount and calculated discount are based on a new field available on every supplier form (Back office\maintenance\suppliers).

Suppliers screen discount field
The new field is highlighted in yellow.

| Gardners Books Ltd			Record Dues (Default)	S
Default Transmission Method	EDI via Batch		Min Order Value: STG	0.00
Supplier SAN	0117765		Max Order Value: STG	1000.00
Ordering EAN/GLN	5030670117765		Order Check Value: STG	500.00
Returns EAN/GLN	5013546113245		Default Discount:	35.00
Invoicing EAN/GLN	5013546113245		Supplier PubEasy Affiliate Id	505
Invoice/Credit days to check	7			

7 Stock Quantity Displayed in Order Detail Screen

This version displays current stock from within a purchase order awaiting transmission, meaning that the stock can be easily checked without having to exit to another screen to check.

of Lines:	12	No. of Books:	12	Value:	154.91		Min Order Value:	0.00			
N	Title		Author	Pub	Bg	Info1	Info2	Info3	Num	Reference	Ord Qty	Qty In Stock	Gard

N	Title	Author	Pub	Bg	Info1	Info2	Info3	Num	Reference	Ord Qty	Qty In Stock	Gard
0708899427	The Nickel Boys: Winner of the Pulitzer I	Whitehead	Little, Browr	P					RS210712	1	0	
0751576948	Still Life	Val	Sphere	P					RS210710	1	0	
1408363171	Ten Little Monkeys	Brownlow	Orchard Bo	O					RS210712	1	0	
1408714645	Landslide	Wolff	The Bridge	H					JONES210709	1	1	
1409158387	Magpie Murders: the Sunday Times best	Horowitz	Orion Publis	P					RS210712	1	0	
1409183815	Being the Supervet	Fitzpatrick	Trapeze	P					RS210712	1	0	
1409195818	A Day At the Beach Hut	Henry	Orion Book:	P					RS210710	1	0	
1529369854	Vaxxers	Gilbert	Hodder & S	H					RS210712	1	0	
1529379778	The Valleys of the Assassins	Stark	John Murra	P					RS210712	1	0	
1529415278	Sista Sister	Brathwaite	Quercus	H					RS210712	1	0	

8 Deleting or Weeding Reorder from Sales

To address a common request to do with Reorder from Sales (Sales) we have now added a 'Clear Up Button'. This button prompts you for the number of lines to be left following a clear up.
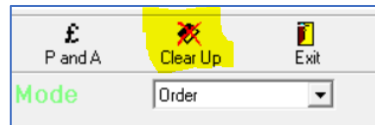
In this case the 100 most recent lines would be left once the OK button has been clicked and a secondary 'Are You Sure' confirmation.
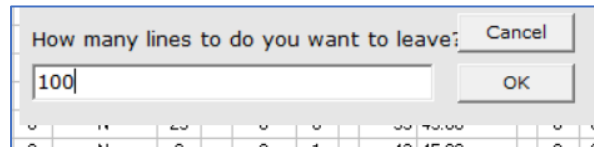
9 Mobile Phone Number Error Checking

We now check mobile phones for potential formatting errors before transferring to Clickatell. This means we check the number is a mobile phone by checking it begins '07' and is 11 characters long. Spaces are OK as we don't count those as characters so '0777 123 4567' is OK. If an error is found it will be displayed but will not stop the remaining numbers being sent. Any overseas numbers are excluded so numbers prefixed 00353 etc will not pass the test.

10 Order Clear Up

We now have a tool that will remove old orders and which works on a simple date basis. At this time, we have not released this option as a general part of BatchLine but can run it for you on request. Email mail@batch.co.uk for us to call you back about this option.

www.batch.co.uk

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