

# Auto-categorisation with Thema Codes and Changes to Goods In

| H                 | 4 F F   | New                                  |  | Si Edit  | Delete  | Mov   | Titles  | (2<br>Can  | cel               | Stock List       | ReCategorise       | Exit      |          |           |          |
|-------------------|---|--------------------------------------|--|--|---|---|---|------------|-------------------|------------------|--------------------|-----------|----------|-----------|----------|
| D                 | Shop Category =   | 0                                    | penbrav  | Categor  | In Stock  | On Order  | Stock Rec   | cords      | Subje             | cts Mapped to    | Category           |           |          |           |          |
| 10                | COOKERY   | 0                                    | 1 - Books  | 5  | 108   | 60  |   | 1497       | WB,               |                  |                    |           |          |           |          |
| 11                | CRIME   | 0                                    | 1 - Books  | 5  | 208   | 55  | 5   | 1995       | FF,               |                  |                    |           |          |           |          |
| 4                 | FICTION   | 0                                    | 1 - Books  | 5  | 991   | 177   | 7 1   | 8748       | FB, FD            | ), FG, FH, FJ, I | FP, FQ, FR, FS, FT | , FU, FV, | FW, FX,  | FY, FZ,   |          |
| 5                 | GARDENING   | 0                                    | 1 - Books  | 5  | 4   | 6   | 5   | 297        | WM,               |                  |                    |           |          |           |          |
| 7                 | HISTORY   | 0                                    | 1 - Books  | 5  | 203   | 43  | 3 :   | 2210       | N, WQ             |                  |                    |           |          |           |          |
| 9                 | LOCAL   | 0                                    | 1 - Books  | 5  | 528   | 17  | 7   | 493        | No sub            | bjects mappe     | đ                  |           |          |           |          |
| 0                 | NATURAL HISTORY   | 0                                    | 1 - Books  | 5  | 197   | 61  | 1   | 1231       | WN,               |                  |                    |           |          |           |          |
| 1                 | NON FICTION OTHER   | R 0                                  | 1 - Books  | 5  | 451   | 115   | 5   | 3535       | C, DS             | , G, J, K, L, M  | , P, Q, T, U, V,   |           |          |           |          |
| 2                 | CH PICTURE BOOKS  | 6 0                                  | 1 - Books  | 5  | 380   | 147   | 7 :   | 2490       | YBC,              | YBL,             |                    |           |          |           |          |
| 5                 | SCIENCE FICTION   | 0                                    | 1 - Books  | 5  | 195   | 50  | ) :   | 1452       | FK, FL            | , FM, X,         |                    |           |          |           |          |
| 6                 | SPORT, ENTERTAIN  | ME 0                                 | 1 - Books  | 5  | 149   | 99  | 9 3   | 2039       | AT, AV            | , S, WD, WG,     | WH,                |           |          |           |          |
| ıbj               | ect WB: Cookery /<br>s to   | foo                                  | d and d  | lrink  |   |   |   |            |                   | Additiona        | l Logic for: WB:   | Cookery   | / food   | and drink | 1<br>c   |
| ubj<br>ap:<br>20  | ect WB: Cookery /<br>s to<br>KERY<br>gn Subject to Catego   | foo                                  | d and d<br>No Quali  | lrink  |   | •   | Clear   | c          | lear All          | Additiona        | I Logic for: WB:   | Cookery   | / food a | and drink | 2        |
| ubj<br>ap:<br>DO  | ect WB: Cookery /<br>s to<br>KERY<br>gn Subject to Catego<br>S: Sport<br>S: Sport<br>T: Tech<br>U: Com                        | ry<br>ts an<br>nolo<br>puti          | d and d<br>No Quali<br>nd Actir<br>gy, Eng<br>ng and   | fier<br>ve outd<br>jineerin<br>Informa   | oor recrea<br>g, Agricul<br>ation Tech  | ation<br>lture, In<br>nology  | Clear<br>dustrial p   |            | lear All          | Additiona        | l Logic for: WB: I | Cookery   | / food i | and drink | 2        |
| ap:<br>500        | ect WB: Cookery /<br>s to<br>KERY<br>gn Subject to Catego<br>S: Sport<br>C T: Tech<br>U: Com<br>U: Com<br>W: Life             | ry<br>ts an<br>nolo<br>puti<br>th, F | d and d<br>No Quali<br>nd Actin<br>gy, Eng<br>ng and<br>telation<br>e, Hobb<br>WC:                   | fier<br>ve outdo<br>gineerin<br>Informa<br>ies and<br>Cooker   | oor recrea<br>g, Agricul<br>ation Tech<br>nd Person<br>Leisure<br>y / food a<br>s vintan  | ation<br>lture, In<br>hnology<br>nal deve   | Clear<br>dustrial p<br>clopment   |            | lear All          | Additiona        | l Logic for: WB:   | Cookery   | / food a | and drink | <b>`</b> |
| ap:<br>>O         | ect WB: Cookery /<br>s to<br>KERY<br>gn Subject to Catego<br>S: Sport<br>C T: Tech<br>U: Com<br>U: Com<br>V: Heal<br>W: Lifes | ry<br>ts an<br>nolo<br>puti<br>th, F | d and d<br>No Quali<br>nd Actin<br>gy, Eng<br>and<br>telation<br>s, Hobb<br>WB:<br>WC:<br>WD:<br>WD: | fier<br>ve outdo<br>jineerin<br>Informi<br>isei sand<br>Cooker<br>Antique<br>Hobbie<br>Handici                     | oor recrea<br>g, Agricul<br>ation Tech<br>nd Perso<br>Leisure<br><b>y / food</b><br>es, vintag<br>s, vintag<br>s, vintag<br>s, vintag | ation<br>Iture, In<br>Innology<br>nal deve<br>and drint<br>e and cc<br>s and ga<br>orative                  | Clear<br>dustrial p<br>clopment<br>cloplectable<br>mes<br>arts and o      | C<br>proce | lear All<br>esses | Additiona        | l Logic for: WB:   | Cookery   | / food a | and drink | 2        |
| ubj<br>ap:<br>SSI | ect WB: Cookery /<br>s to<br>KERY<br>gn Subject to Catego<br>S: Sport<br>S: Sport<br>T: Techt<br>U: Com<br>U: Com<br>U: Lifee | ry<br>ts an<br>nolo<br>puti<br>th, F | d and d<br>No Quali<br>nd Actin<br>gy, Eng<br>and<br>telation<br>s, Hobb<br>WB:<br>WC:<br>WD:<br>WF: | fier<br>ye outdo<br>gineerin<br>Informa<br>ships a<br>ies and<br>Cooker<br>Antique<br>Habbie<br>Handico<br>Transpu | oor recrea<br>g, Agricul<br>ation Tech<br>nd Perso<br>Leisure<br>y / food a<br>ss, vintag<br>s, quizzes<br>s, quizzes<br>ort: gener   | ation<br>Iture, In<br>Innology<br>nal deve<br>and drink<br>e and co<br>s and ga<br>orative a<br>ral interco | Clear<br>dustrial p<br>clopment<br>cliectable<br>mes<br>arts and c<br>est | <br>proce  | esses             | Additiona        | l Logic for: WB:   | Cookery   | / food a | and drink | 2        |

# Available from BatchLine version 4.50 onwards

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:

| Subject YF: Children's / Teenage fiction and true stories    | Additional Logic for: YF: Children's / Teenage fiction and true stories |
|--|---|
| maps to  | + Interest age: from c 5 years = CH 5 TO 8                              |
| Undefined  |   |
| Assign Subject to Category No Qualifier  Clear All           |   |
| 5AC - Interest age: from c 3 year: A                         | ,   |
| W: Lifestyle SAF - Interest age: from c 4 year:              |   |
| X: Graphic (5AG - Interest age: from c 6 year: 5             |   |
| SAH - Interest age: from c 7 years                           |   |
| 5AK - Interest age: from c 9 years is, activity books, early | / learning concepts   |
| ⇒ 5AL - Interest age: from c 10 year betry, anthologies, ann | uals  |
| YF: Children's / Teenage fiction and true stories            |   |
| 🕀 YN: Children's / Teenage: General interest                 |   |
|  |   |

For a more in depth look at auto-categorisation and the subject of Thema codes please look at the BatchLine You Tube Channel <u>https://www.youtube.com/channel/UCiNvzATEjSfT11uDbNOKDQQ</u> 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 <u>https://ns.editeur.org/thema/en</u>

### 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

| <ul> <li>Scanned Goods I</li> <li>Edit</li> </ul> | n - Scanned Iten  | ns                    |                                      |          |             |            |                 |     |             |           | - |            | ×      |
|---|-------------------|-----------------------|--------------------------------------|----------|-------------|------------|-----------------|-----|-------------|-----------|---|------------|--------|
| 9<br>Process                                      | ➡<br>Import Lines | Stock record          | )<br>Details                         | Customer | )<br>Detail | s De       | <b>i</b> lete   |     |             |           |   |            |        |
| Add ISBN/EAN                                      | Import ISBN       | 🐹<br>Change ISBN      | <mark>≮</mark><br>Assign to Customer | Total Q  | uantity     | : 17 Tot   | al RRP : 158    | .82 |             |           |   |            |        |
| ISBN/EAN:   |                   | Qty: 1                | Single Copy 💌                        | Damage   | ed? 🗆       |            |                 |     |             |           |   |            |        |
| No. EAN/ISBN13=                                   | Title≔            |                       | Author⊨                              | RRP⊨     | Rpt≔        | Rpt Date≔  | Category⊨       | Qty | P0 =        | Line Ref⊏ | C | Cust Foren | ame: , |
| 186 9780861540495                                 | i Trans           |                       | Joyce, Helen                         | 16.99    |             | 29/07/2021 | NON FICTION OTI | 1   | ORDER77615  | ST210710  | н |            |        |
| 186 9788868609511                                 | The Age of Dino   | saurs - 3D Stegosa    | auri Bonaguro, Valent                | 14.98    |             |            | CH REFERENCE    | 1   | RS210-12142 | AutoNoPo  | н |            |        |
| 186 9781788161220                                 | Signs of Life     |                       | Fabes, Stephen                       | 10.99    | WH          |            | Travel2         | 1   | RS210-12142 | AutoNoPo  | Р |            |        |
| 186 9781786498335                                 | The Great Imper   | ial Hangover          | Puri, Samir                          | 9.99     | WH          |            | HISTORY         | 1   | RS210-12142 | AutoNoPo  | P |            |        |
| 186 9781786499783                                 | Why the German    | ns Do It Better       | Kampfner, John                       | 9.99     |             |            | NON FICTION OTI | 1   | RS210-12142 | AutoNoPo  | Р |            |        |
| 186 9781788161176                                 | A Cheesemonge     | er's History of The B | riti: Palmer, Ned                    | 9.99     |             |            | COOKERY         | 1   | RS210-12142 | AutoNoPo  | P |            |        |
| 186 9781783352067                                 | Shadow State      |                       | Harding, Luke                        | 9.99     |             |            | NON FICTION OTI | 1   | ORDER7743   | RS210707  | P |            | _      |
| 186 9781800750302                                 | Nomadland         |                       | Jessica, Bruder                      | 8.99     |             |            | NON FICTION OTI | 1   | RS210-12142 | AutoNoPo  | Р |            |        |
| 186 9781788165754                                 | Murder Takes a    | Holiday               | Gayford, Cecily                      | 8.99     |             |            | CRIME           | 1   | RS210-12142 | AutoNoPo  | Р |            |        |
| 186 9780571273713                                 | Mayflies          |                       | 0'Hagan, Andrew                      | 8.99     | WH          |            | FICTION         | 1   | RS210-12142 | AutoNoPo  | P |            |        |
| 186 9781912650736                                 | Dino Knights      |                       | Norton, Jeff                         | 6.99     |             |            | CH 9 TO 12      | 1   | RS210-12142 | AutoNoPo  | Р |            |        |
| 186 9781800900011                                 | Tea Party Parad   | le 🛛                  | Sharratt, Nick                       | 6.99     |             |            | CH 5 TO 8       | 1   | RS210-12142 | AutoNoPo  | P |            |        |
| 186 9781781129289                                 | Clever Cakes      |                       | Rosen, Michael                       | 6.99     |             |            | CH 5 TO 8       | 1   | RS210-12142 | AutoNoPo  | P |            |        |
| 186 9781781129517                                 | Madam Squeake     | er                    | Jones, Pip                           | 6.99     |             |            | CH 5 TO 8       | 1   | RS210-12142 | AutoNoPo  | P |            |        |

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.

Contact for all BatchLine queries: mail@batch.co.uk