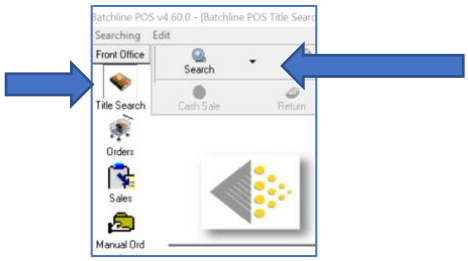
Quick Start Guide to Running Your Bookshop with BatchLine

1 Searching for and ordering books

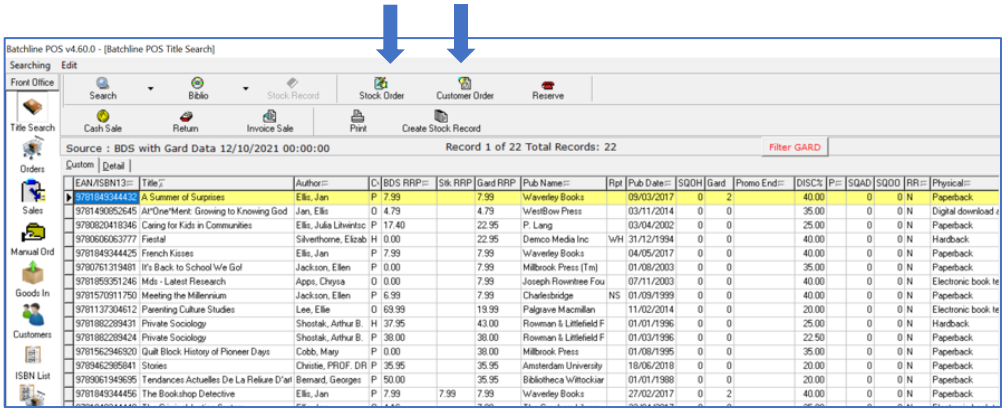
1. Title Search

1. Click on the Title Search icon in the left-hand menu under Front Office to open up the Title Search screen, then select Search at the top of the page. (The default database is BDS Online.)



2. Enter information in the appropriate field(s) using key words then press Return or click on Search.

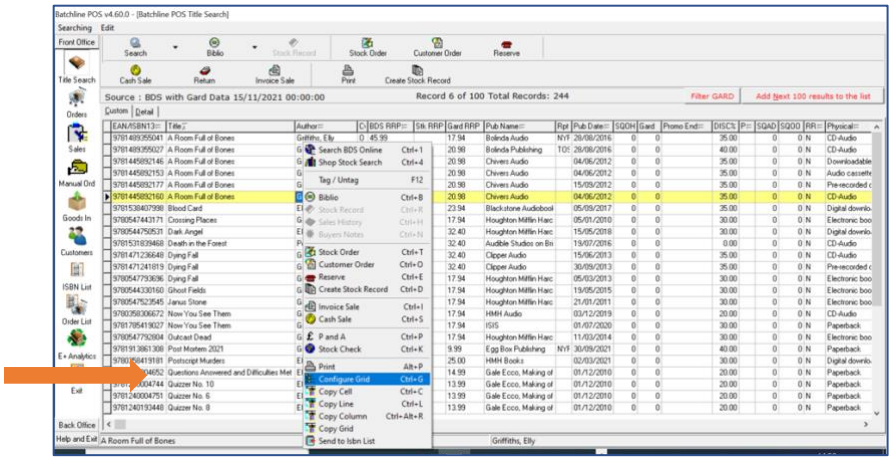
3. The search results will be displayed on a grid. Highlight the item and right click on the mouse to select Stock Order or Customer Order. You can also use the icons at the top of the screen.

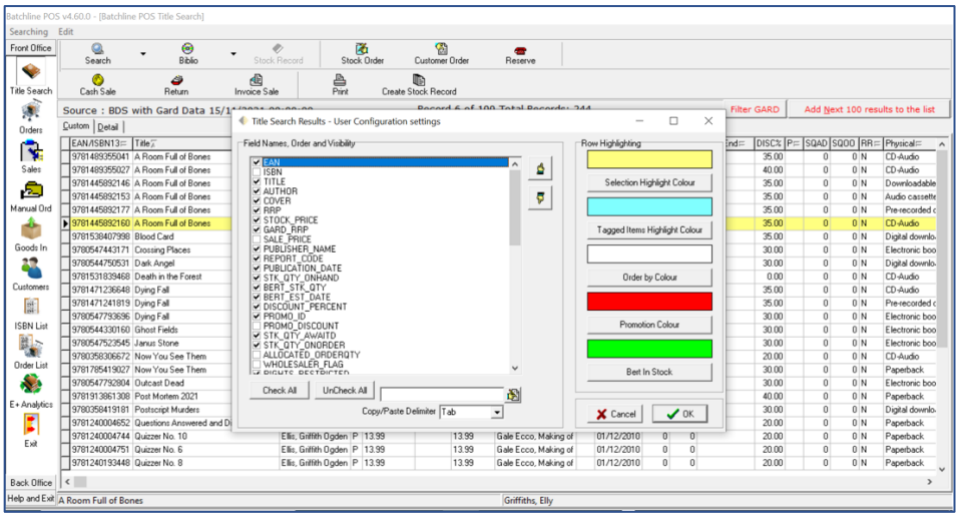


Search TIPs

* The Availability dropdown menu at the bottom of the Search box is set to Active or Forthcoming. Select Show All to include OP Titles, etc.
* Previous Searches at the bottom of the search screen will bring back the last 100 searches that have been performed.
* If you're unsure of a title or the spelling, use the wild card * at the end of the information or spelling eg. Dost* if you are not sure how to spell Dostoevsky.

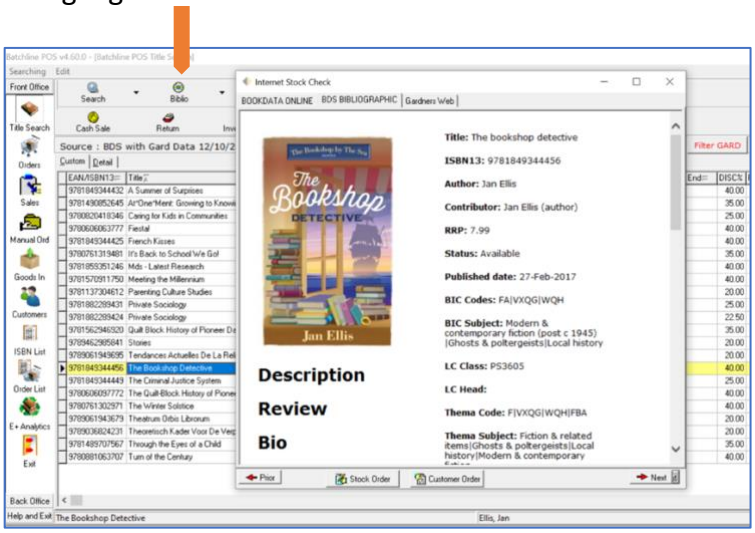
* Right click on the Title Search page to Configure Grid and add or remove columns.





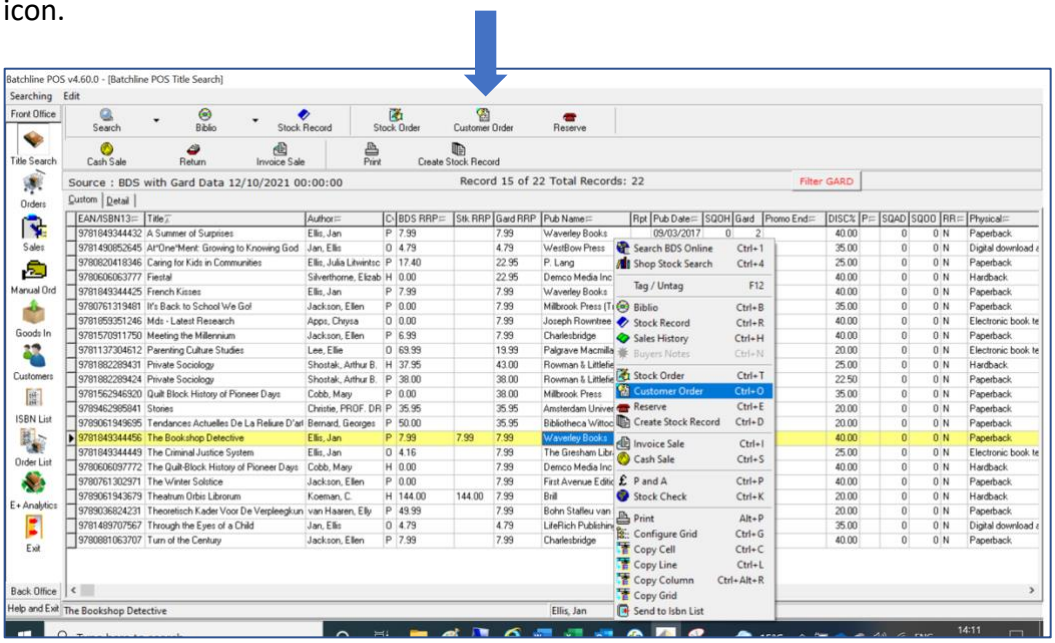
Biblio Tool

1. Highlight the book then click on the Biblio icon to see all the bibliographical details for that title.

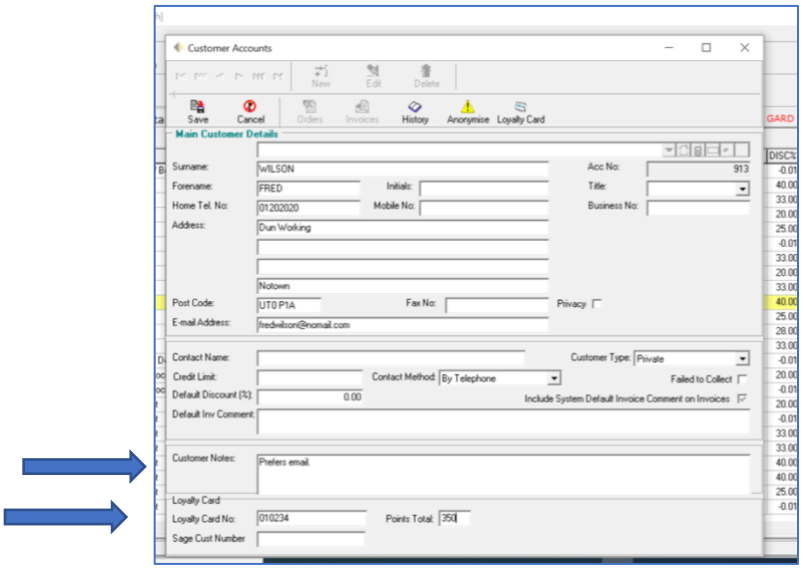


2. Customer Orders

1. From the Title Search results grid, highlight the book then right click or select the Customer Order icon.



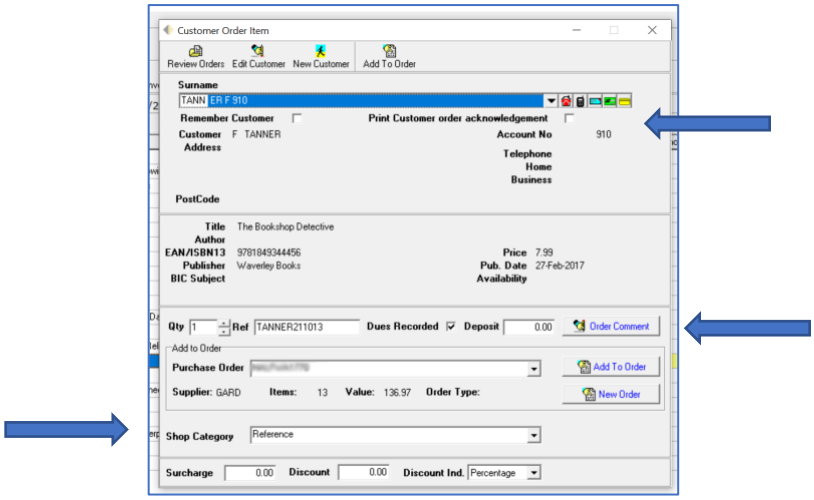
2. For a new customer, click on the New Customer icon at the top of the screen and enter the customer details, including any Notes and their Loyalty Card number. You can use the tab key to move round the screen. Select Save.



3. For an existing customer, begin typing the surname into the blue Surname field. Alternatively, click on the down arrow at the end of the surname field and scroll through the customer list to locate the correct customer. Left click on the customer to select.

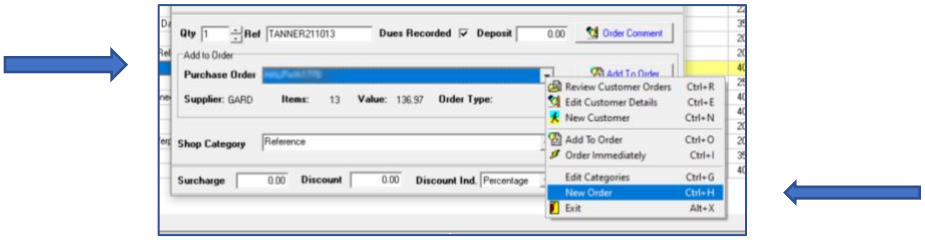
The quantity on the Customer Order Item screen will default to 1. Edit quantity if required. You have the option to add an Order Comment and select Print Customer order acknowledgement.

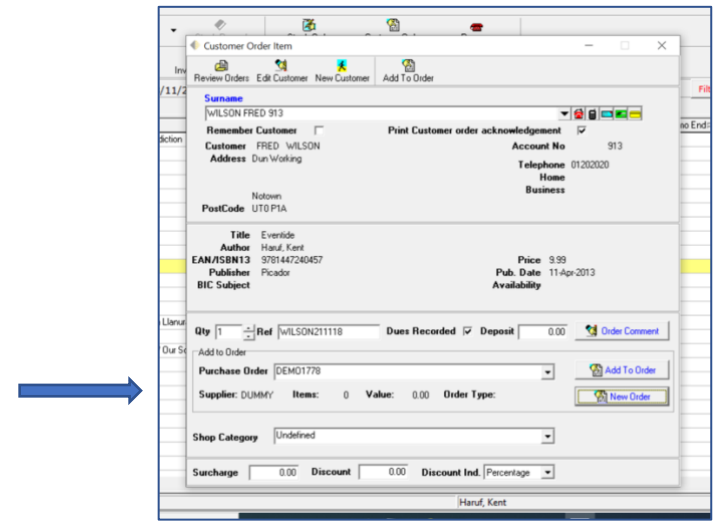
Select a category, if necessary, by clicking on the down arrow at the end of the Shop Category field to display available options. Use the cursor key to highlight the required category. To create a new category, right click on Shop Category to open a link and select Edit Categories.



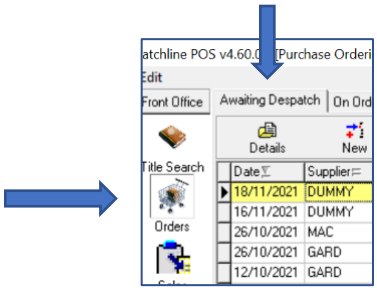
4. To add the book to an existing order, first check that the correct Purchase Order and Supplier are selected: the default is Gardners. To change the selected Purchase Order, click on the down arrow at the end of the Purchase Order field to display available orders. Select Add to Order.

5. To create a new Purchase Order, right click on the mouse and select New Order or click on the Purchase Order field (blue) to open a link.

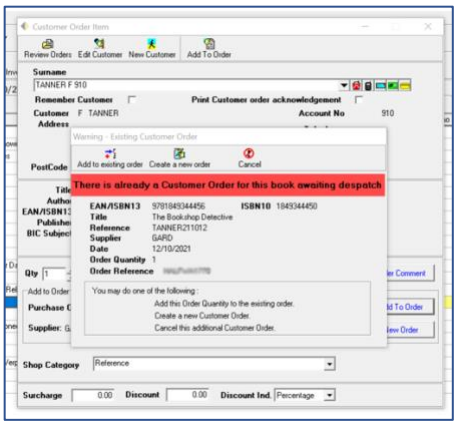




6. When an order has been placed, the screen will return to the Title Search grid. To view your order, select Orders from the left-hand menu then the Awaiting Despatch tab.



Tip: A warning box will come up to asking you to confirm this order if the book is already on order elsewhere.

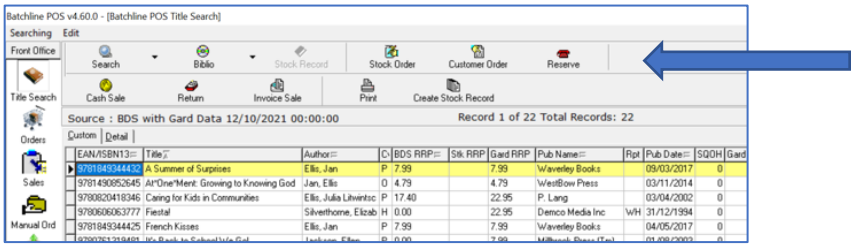


3. Ordering Multiple Titles for Customer or Stock

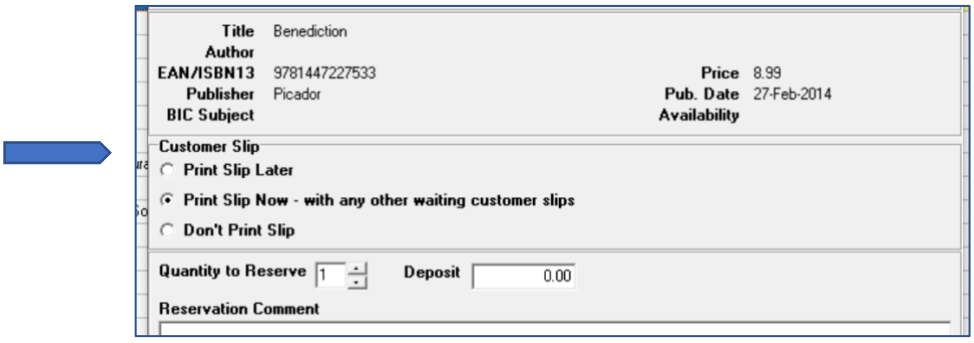
1. To select titles to be ordered from a list on the Title Search result grid, highlight a line, right click and select Tag/Untag. Tagged lines will remain highlighted and can then be ordered for stock or a customer. The lines can be added to an existing order or ordered immediately.

4. Reserving Items for a Customer from Shop Stock

1. Highlight the book from the Title Search result grid, then select Reserve.



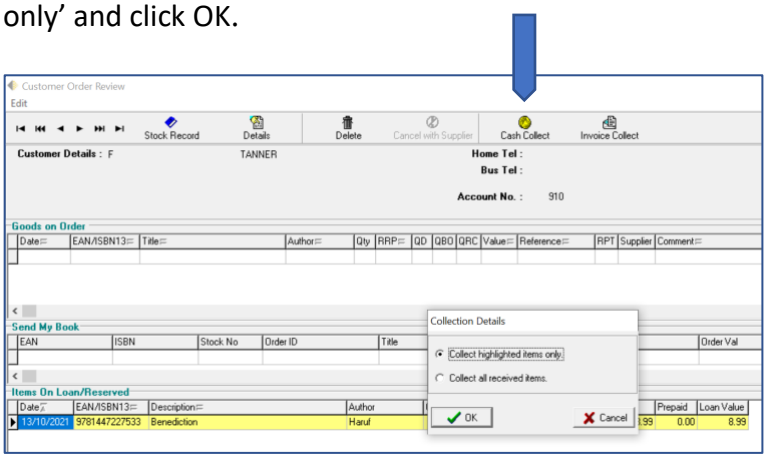
2. Select the customer or create a new customer record in the Reserve Item box. (See 2. Customer Orders.) You have the option to print a customer slip for this item later or now so the title can be sold by scanning the slip. There is also a Don't Print Slip option. Choose your print option then select Reserve Item to send to print or create a PDF.



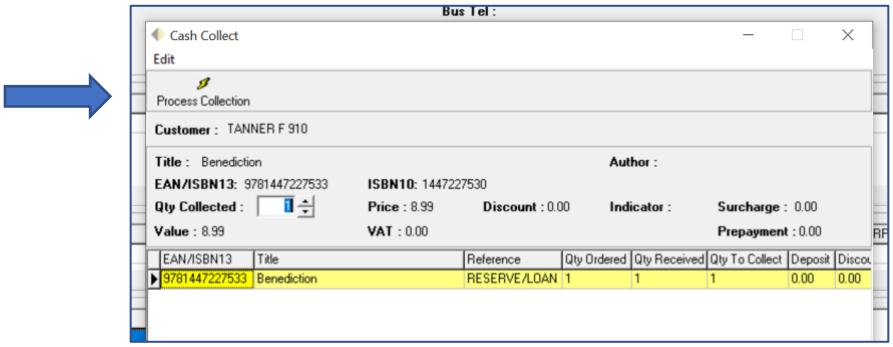
Note: If you choose not to print and scan the slip when the book is sold it will become a stock sale and the reserve item will remain on the customer account.

3. To sell the book to the customer if there is no customer slip, do not scan the book when selling, but click on the Customers icon on the left-hand (Front Office) menu bar.

4. Choose the customer then select Orders. Highlight the line showing under the green heading Items On Loan/Reserved. Select Cash Collect and a pop-up box will appear. Select 'Collect highlighted items only' and click OK.



5. When the Cash Collect window appears, select Process Collection.

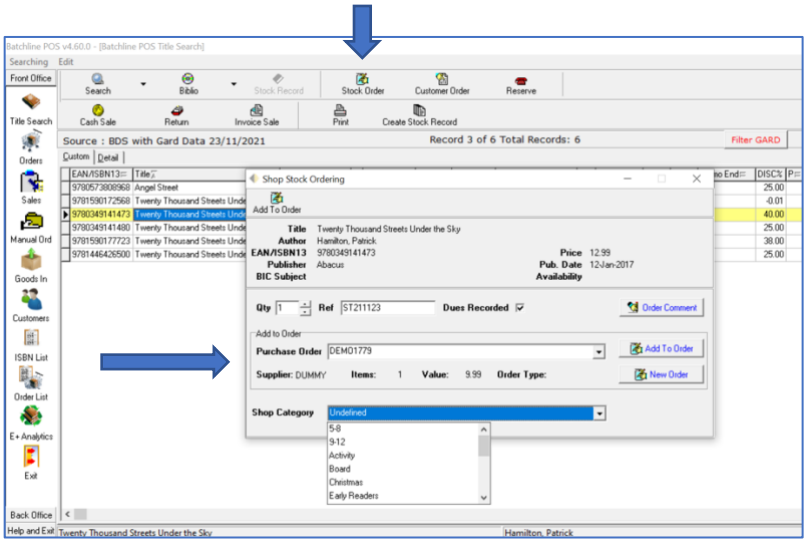


6. The green heading Items On Loan/Reserved will turn red and a record of the sale will appear on your Sales list. Click on the X in the top right-hand corner to exit the screen.

5. Stock Order

1. From the Title Search results grid, highlight the book and select Stock Order from the top of the page. The Quantity will default to 1, but can be edited if more are required.

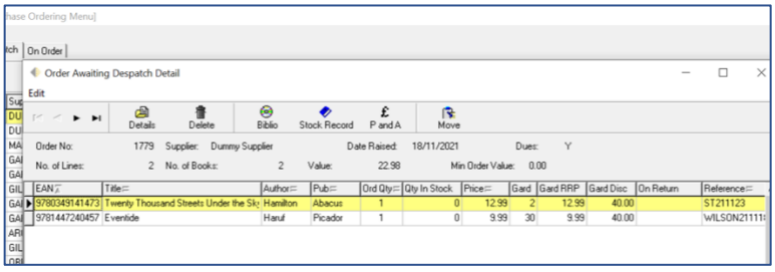
Click on the down arrow at end of the Shop Category field to display available Categories and use the cursor key to highlight the one required. To create a new category, clicking on Shop Category (blue text) will open an Edit link.



2. To add to an existing order, first check that the correct purchase order and supplier have been selected. Click on the down arrow at end of the Purchase Order field to display the available orders.

3. Select the New Order button to create a new Purchase Order then select Add to Order.

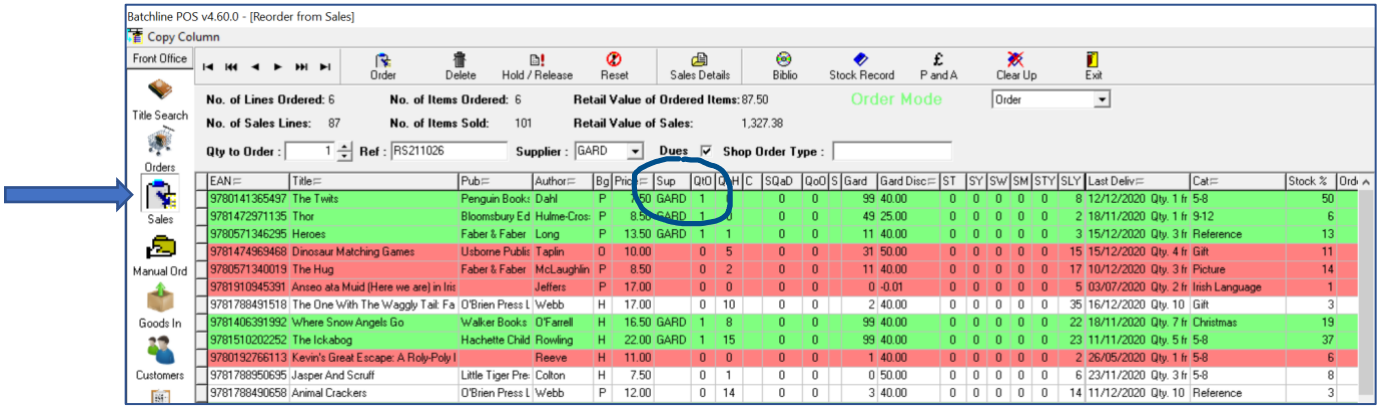
4. When the order has been placed the screen will return to the Title Search grid, and the order can be viewed in Orders/Awaiting Despatch.



6. Reordering from Sales

View

1. To view your sales, click on the Sales icon from the left-hand menu (under Front Office).



2. The Reorder from Sales grid shows all the titles that have been sold and need to be ordered or deleted from the reordering process. The fastest way to do this by is using the keyboard:

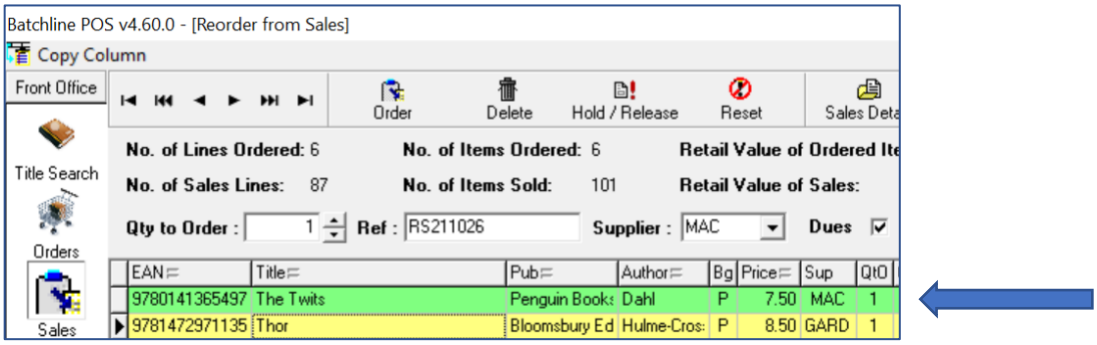
– Use the arrow keys to move up and down the grid.
– Press the return key to select titles to reorder.
– Remove titles from the grid by pressing the delete key.

Note: Titles are only deleted from the grid, not from the sales history.

Select

1. Select the supplier using the dropdown box at top of screen. (The default is set to Gardners, but direct ordering is available from a number of leading publishers.)

2. Use the mouse to click on the first title to be ordered. Press the return key and the line will change to green and a quantity of 1 will appear in the **QtO** column. The supplier's name will appear in the **Sup** column and the next line will be highlighted in yellow.



3. To order multiple copies, highlight selected line, update the quantity from 1 and press return.

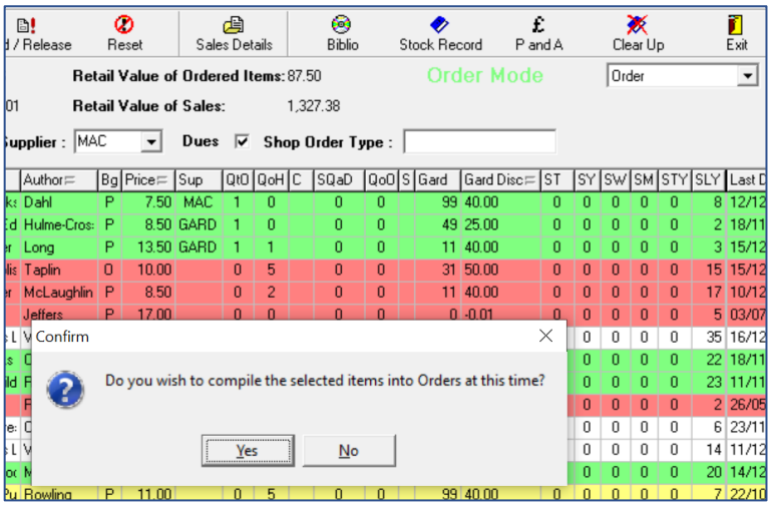
4. Work through the list selecting lines to order, remembering to change the supplier where necessary.

Delete

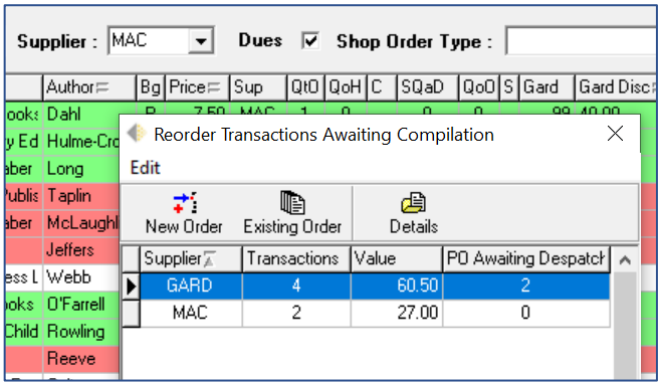
1. Highlight the title to be removed and press the Delete key. The line will change to red and the next line will be highlighted. The deleted line will be removed from the grid when you leave the Reorder from Sales screen.

Compile sales into an order

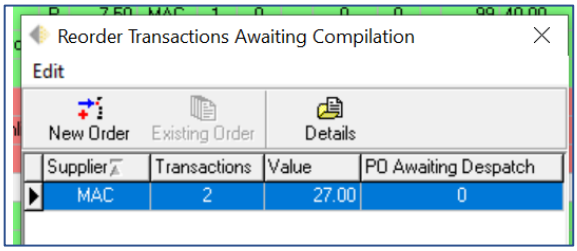
1. To compile Reorder from Sales into an order, select Exit and a confirmation box will appear with the message 'Do you wish to compile the selected items into Orders at this time?'. Select Yes.



2. A window with the message Reorder Transactions Awaiting Compilation will open listing by supplier the number of titles selected for reorder. On it are option to add lines to an Existing Order already open for that supplier or to create a new order.

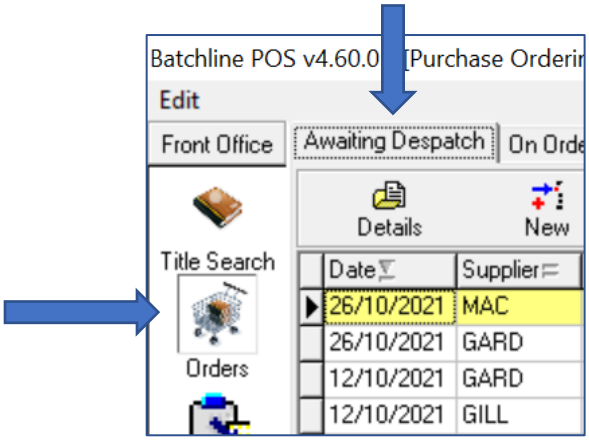


3. Highlight the supplier and select New Order to add everything to a new order or select Existing Order.



4. Repeat this with each supplier until the Reorder Transactions Awaiting Compilation grid is empty.

5. Orders can be viewed in Orders/Awaiting Despatch



<u>Sending Orders</u>

1. Click on Orders from the left-hand side bar (Front Office). Orders will always open on the Awaiting Despatch screen
2. Highlight the order to be despatched. To check the order before sending it, right click on the mouse and select Details. If there are errors, these can be edited at this stage. Double click to open and correct the order, then select Save. Exit Order Awaiting Despatch Detail.
3. To send the order, right click on the mouse or select Transmit and the Order Transmission Window will appear.
4. Confirm Transmit Order and the order progress will be displayed on the screen.
5. On completion, acknowledgements will be displayed. Print a copy if required.