

Version 4.50 the Auto-Categorisation Update Including:

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

10 11	Shop Category =		Delete	MOVE	Titles Can	cel Stock	k List	ReCategorise	Exit	_		
11		Openbravo Categor	In Stock	On Order	Stock Records	Subjects Map	ped to C	Category				
	COOKERY	01 - Books	108	60	1497	WB,						
	CRIME	01 - Books	208	55	1995	FF,						
14	FICTION	01 - Books	991	177	8748	FB, FD, FG, FH	H, FJ, FP	FQ, FR, FS, FT,	FU, FV, FW	, FX, FY,	FZ,	
15	GARDENING	01 - Books	4	6	297	WM,						
17	HISTORY	01 - Books	203	43		N, WQ,						
	LOCAL	01 - Books	528	17	493	No subjects m	napped					
20	NATURAL HISTORY	01 - Books	197	61	1231	WN,						
21	NON FICTION OTHER	01 - Books	451	115	3535	C, DS, G, J, K	(, L, M, I	P, Q, T, U, V,				
22	CH PICTURE BOOKS	01 - Books	380	147	2490	YBC, YBL,						
25	SCIENCE FICTION	01 - Books	195	50	1452	FK, FL, FM, X,						
26	SPORT, ENTERTAINME	01 - Books	149	99	2039	AT, AV, S, WD	, WG, W	/Н,				
	KERY	No Qualifier		•	Clear Clear	lear All						
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	U: Compu U: Health	ology, Engineerin uting and Informa , Relationships a yle, Hobbies and <u>WB: Cooker</u> WC: Antique WD: Hobbie	ation Tech nd Person Leisure y / food a es, vintag	hnology nal devel and drink je and co	opment lectables	esses						
	1	WD: Hobbie	s, quizzes	s and gar	nes							

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:

	Additional Logic for: YF: Children's / Teenage fiction and true stories
maps to	+ Interest age: from c 5 years = CH 5 TO 8 + Interest age: from c 12 years = CH 9 TO 12
Undefined	
Assign Subject to Category No Qualifier Clear All SAC - Interest age: from c 3 year: SAD - Interest age: from c 4 year: SAC - Interest age: from c 5 years SAG - Interest age: from c 6 years SAG - Interest age: from c 7 years SAH - Interest age: from c 9 years SAK - Interest age: from c 9 years SAL - Interest age: from c 10 year SAL - Interest	learning concepts uals

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>

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

	(Ph			Cartonio	r Detail:	s De	elete					
AN	Import ISBN	🐹 Change ISBN	K Assign to Customer	Total Q	uantity :	17 To	tal RRP : 158	3.82				
		Qty: 1	Single Copy 💌	Damag	ed? 🕅							
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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 Stock Record Search Biblio Customer Urder Stock Urder Heserve Lash Sale Heturn Invoice Sale Record 1 of 1 Total Records: 1 ource : BDS with Gard Data 18/07/2021 00:00:00 ustom Detail Rpt Pub Date≔ SQOH Gard Promo End≔ DISC% P≔ SQAD SQOD RR≔ Phys C BDS RRP≔ Stk RRP Gard RRP Pub Name≔ EAN/ISBN13⊏ Title⊊ Author⊨ 781406379211 Where Football Saves the World Bellos, Alex 6.99 Walker Books Ltd 03/05/2018 46 14/ 6.99 6.99

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.

Print

Lite

Gardners Rights Restricted

<u>Custom</u> <u>D</u> etail																		
EAN/ISBN13⊏ T	[itle ∡	Author⊨	C١	BDS RRP⊨	Stk RRP	Gard RRP	Pub Name⊨	Rpt	Pub Date≔	SQOH	Gard	Promo End≔	DISC%	P⊨ S	QAD	SQOO	RR≔	Physical
▶ 9780834217270 M	fanaged Behavioral Health Care Handb	Ross, E. Clarke	0	233.99		233.99	Aspen Publishers	TOS	25/05/2001	0	0		-0.01		0	0	Y	Book
			-			200.00				Ť			0.01					

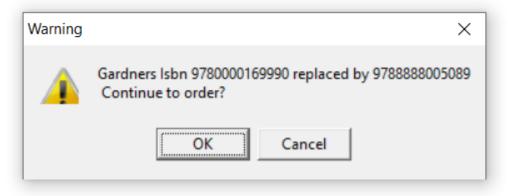
A second new field display whether a title is rights restricted. This the 'RR' field, which has a red background and a 'Y' if a title is rights restricted. Further information on individual titles can be found on the Gardners website.

Rights Restricted Country Settings

1	Address System Scanner Nielsen Order Currency F	Reports Security Email Settings SMS Config	
-	Shop Name Test Books	VAT Reg. 123 4567 12	
	Shop Address	Delivery Address	
	The Bookshop 8 High Street		
	Anytown Anyshire		
	Post Code AB1 2RF	Region (for rights UKI,UNITED KINGDON 💌	
	Modem Number 0123 456 789	E-mail Address testmail@testbook.com	
	Telephone Number 0123 436 789 Fax Number	ISAN 12344567	
		EAN 00306123406	

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.

ISBN Change



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

🜓 🌒 Sys	stem Configurat	ion				_	×
1	<u>S</u> . <u>E</u> dit	Prove Save	🕜 Cancel	Edit Internet Det	ails		
Addre	ss System Sca	anner Nielsen Ord	er Currency R	eports Security	Email Settings St	IS Config	
Fro	m Name:	The Test Bookshop					
Fro	m Address:	test@testbookshop.	co.uk				
Rep	ply to Address:	test@testbookshop	co.uk	Email Sub	oject: Book Order		
Hos	st Address:						
Log	jin Name:						
Log	jin Password:						
Em	ail Message	Dear Customer,					^
		Your order is ready f	or collection				
		Thank you					~
Ser	nd Copy To Self:			e-mail order to you Order transmission.	ur sending account.		
End	crypted?:	🔽 Email server requ	uires secure conne	ection. Only applica	able if using SMTP.		
L Em	ail Type:	SendGrid	•				

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	М	Ack
▶	19/07/2021	ALB	ORDER77709	N	1	1	9.99	9.99	0.00	0.00	Ρ	
	14/07/2021	GARD	ORDER77685	Y	2	2	40.00	26.00	35.00	0.00	В	
	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	В	
	12/07/2021	GBS	ORDER77651	Y	7	11	107.90	67.44	37.50	0.00	В	
	12/07/2021	HARCOL	ORDER77666	Y	2	2	13.98	8.44	39.60	182.00	В	
	12/07/2021	MACMIL	ORDER77667	Y	4	4	53.97	31.84	41.00	182.00	В	
	10/07/2021	HACH	ORDER77639	Y	12	12	154.91	100.69	35.00	0.00	В	A
	08/07/2021	TURN	ORDER77509	Y	1	1	19.99	19.99	0.00	0.00	М	F
	30/06/2021	JWILEY	ORDER77133	Y	5	5	48.95	48.95	0.00	0.01	М	
	08/05/2021	FSC	ORDER75831	Y	13	14	56.00	56.00	0.00	0.00	Ρ	

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				
Invoice/Credit days to check	7	Supplier PubEasy Affilia	te Id		505

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.

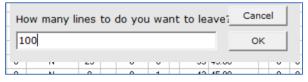
of Lines:	12 No. of Books:	12	Value:		154.91			Min Or	der Value: 0.0	0		
N 🗐	Title≔	Author≔	Pub≔	Bg	Info1	Info2	Info3	Nume	Reference≔	Ord Qty =	Qty In Stock	Gard
0708899427	The Nickel Boys: Winner of the Pulitzer I	Whitehead	Little, Browr	Ρ					RS210712	1	0	
0751576948	Still Life	Val	Sphere	Ρ					RS210710	1	0	
1408363171	Ten Little Monkeys	Brownlow	Orchard Bo	0					RS210712	1	0	
1408714645	Landslide	Wolff	The Bridge	Н					JONES210709	1	1	
1409158387	Magpie Murders: the Sunday Times best	Horowitz	Orion Publis	Ρ					RS210712	1	0	
1409183815	Being the Supervet	Fitzpatrick	Trapeze	Ρ					RS210712	1	0	
1409195818	A Day At the Beach Hut	Henry	Orion Book:	Ρ					RS210710	1	0	
1529369854	Vaxxers	Gilbert	Hodder & S	Н					RS210712	1	0	
1529379778	The Valleys of the Assassins	Stark	John Murra	Ρ					RS210712	1	0	
1529415278	Sista Sister	Brathwaite	Quercus	н					BS210712	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 <u>mail@batch.co.uk</u> for us to call you back about this option.

www.batch.co.uk