Version 4.69

Including:

1. Auto price change
2. Old order clean-up
3. Reorder from Sales option – order from last delivery supplier
4. Goods In AutoNoPo Prompt option
5. Stock History plain text update

Fixes

Update to default order logic to avoid blank order creation
Fix to auto no po process creating incorrect stock on order values

For information and guidance on previous releases, notes are available on:
https://www.batch.co.uk/web/batchline/batchline-pos

1. Auto Price Change

Price changes have become a greater problem than they were in the past, resulting in more shops reporting issues with incorrect pricing. Until now the two ways of updating prices have been:

- Goods in via an electronic invoice via a link to a Batch Payments account. Any difference between stock and invoice price are detected and a prompt to update is displayed.
- Secondly, there is a BatchLine stock update tool which can be used to check and update prices against the BDS system. This update will put a shortcut to the update on your server Desktop called StockUpdate

It has become obvious that we need a better method and therefore we have introduced a third method in title search. The process will identify any difference between a reported Gardners RRP and the local stock price. If there is a difference you will be prompted to change the price:

Before:

Prompt:

After:

If you wanted to update some prices for a given author or series, it is possible to invoke the price change without ordering. Just click on either stock or customer order, the price prompt will appear, click OK, the price will change. Cancel order

Gardners No Price:

A minor change to the title search grid is that now a dash is displayed where there is no avalable Gardners price.


C	RRP	Stk RRP	Gard RRP	Pub Na
P	6.99	6.99	6.99	he Bib
H	4.99	4.9	-	Queen
H	12.99	12 99	12.99	BB C Bo
H	6.69		12.99	BB C Bo
H	12.99		12.99	BB C Bo
P	19.00		-	H chel
P	16.99		-	odder
O	14.99	14.99	-	BBC Bo

2. Old Order Clean-up

It has become apparent that old orders which are never going to be fulfilled plus customer orders that may have been sold as stock can cause problems with 'on order' figures. To date the deletion process has been completely manual and time consuming. This version has added the option to delete all orders before a selected date. This will get rid of any order line that is on order and customer orders that are still showing as uncollected. It will **not** return an uncollected customer order to stock as is normal for a deleted customer order. The overall effect is to zero anything that is showing as on order or uncollected. As a safeguard the process will only delete orders that are over 3 months old.

Note: Please consider doing a 'just in case' backup prior to this procedure. Give the back up a unique name such as 'orderCleanup'.

This new function is available as a button on the On Order tab of the Orders menu:
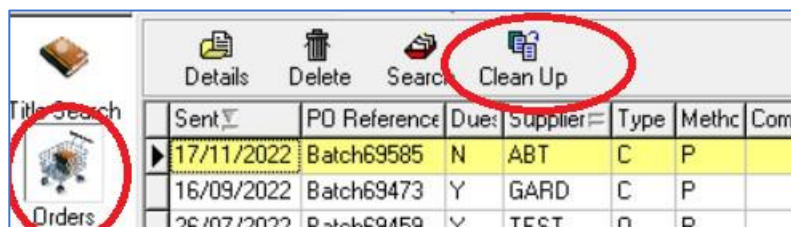
Clicking the button will display the 'Clean-up old orders' menu. By default, the date displayed is 3 months from today's date. It is not possible to select a date more recent than this date. To start the process:

- The default date can be accepted or
- Select an alternative date
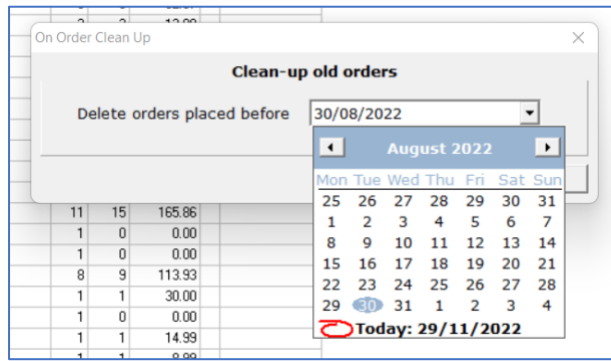
- Click on Start to continue or Close to cancel.
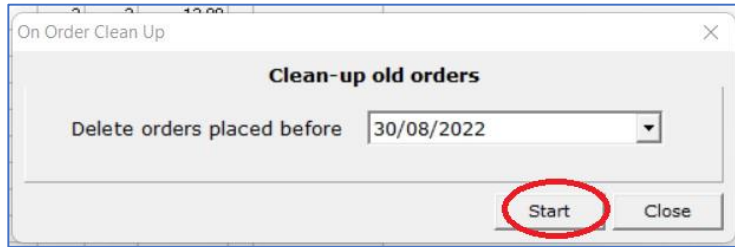
Prior to running, a warning will be displayed. Press OK and the procedure will start. All deleted orders will disappear on completion.

3. Reorder from Sales – Order from last delivery supplier

Since the introduction of electronic ordering from suppliers such as PRH, Macmillan, HarperCollins etc, it is much more common to want to reorder direct from those suppliers. The multi-supplier selection process has always been problematic, each line requiring a change to the supplier drop down before ordering. The new version gives an additional option to automatically change the supplier to the last delivery supplier and therefore speed up the process of ordering from non-default suppliers:

- To use this option, tick the box against 'Use Last Delivery Supplier'.

No. of Items Sold: 31   Retail Value of Sales: 406.77

Ref : RS221129   Supplier : GARD   Dues ✓   Shop Order Type :   ✓ Use Last Delivery Supplier

CSQ		Title	Pub	Author	Bg	Price	Sup	QtO	Core	Stat	QoH	C	SQaD	QoU	S	Gard	Gard Disc	P	Cost
21	0	Again, Rachel	Michael Josepl	Keyes	H	20.00		0	N		1		0	0		99	35.00		11.00
42	0	The Power of the Dog	Vintage Classic	Savage	P	8.99		0	N		2		0	0		99	35.00		4.94

- Press enter on each line as per normal ordering and the supplier will be the last delivery supplier:

: GARD   Dues ✓   Shop Order Type :   ✓ Use Last Delivery Suppl

	Pub	Author	Bg	Price	Sup	QtO	Core	Stat	QoH	C	SQaD	QoO	S	Gard	G
	Michael Josepl	Keyes	H	20.00	GARD	1	N		1		0	0		99	3
	Vintage Classic	Savage	P	8.99	GARD	1	N		2		0	0		99	3
	HarperCollinsP	Taylor	P	8.99	GARD	1	N		1		0	0		19	3
k Sta	Penguin Books	James	H	20.00	PENG	1	N		2		0	0		83	3
	Pushkin Press	Boschwitz	P	8.99	TBS	1	N		-6	×	2	0		99	3
	Viking	McKay	H	20.00	TBS	1	N		1		1	0		99	3
d Do	Ebury Publishir	Rees	P	10.00	GBS	1	N		-214		4	1		2	3
	BBC Books	Smith	0	14.99	ABT	1	N		0	×	0	0		0	3

If you want to go back to the standard method, untick the Last Delivery Supplier box. Both methods can be used during one session.

4. Goods In Change

The introduction of AutoNoPO has been generally accepted as speeding up the scanned goods in process. However, a few shops have asked to be warned before creating an AutoNoPO. We have added an option to warn the user of titles where there is no outstanding Purchase Order, therefore avoiding the creation of an AutoNoPo. This is an optional feature, to enable it follow the method(s) below:

- On creating a Scanned Goods In (SGI) session:

The AutoNoPo tick box when ticked means that an AutoNoPo will be created without prompting. Unticked you will get a prompt whenever no matching order can be found:

Clicking 'No' will ignore that title, clicking 'Yes' will create an AutoNoPo.

- A second way to turn off AutoNoPo and to be prompted is to tick the new 'AutoNoPo' prompt on the SGI Header:

4

Default Orders

The logic behind how a default order is always available has been changed. If default ordering is enabled (see below) a new blank default order will be created at start up if no default order exists. If default order is not enabled, no order will be created.

What is a default order?

To avoid adding order lines to random orders, a default order would normally be present. In this situation, even if many orders exist the default order will be the order displayed when ordering. Other orders can be selected or created manually but, if nothing is done, an order line will go to the default. The default order can be identified by a '3' in the final column

Transmitting the default order:

Once a default order is transmitted a new order with the same settings is created and replaces the previous.

Setting up or changing the default order.

If there is a need to change the default order from one order to another, either create a 'New' or 'Edit' an existing order. In the 'Default' drop down select Single Default Order:

Setting Default Options

The setting for how default ordering works is in:

- Back Office
- Maintenance
- System Config

Once in System Config select the 'Order' tab:
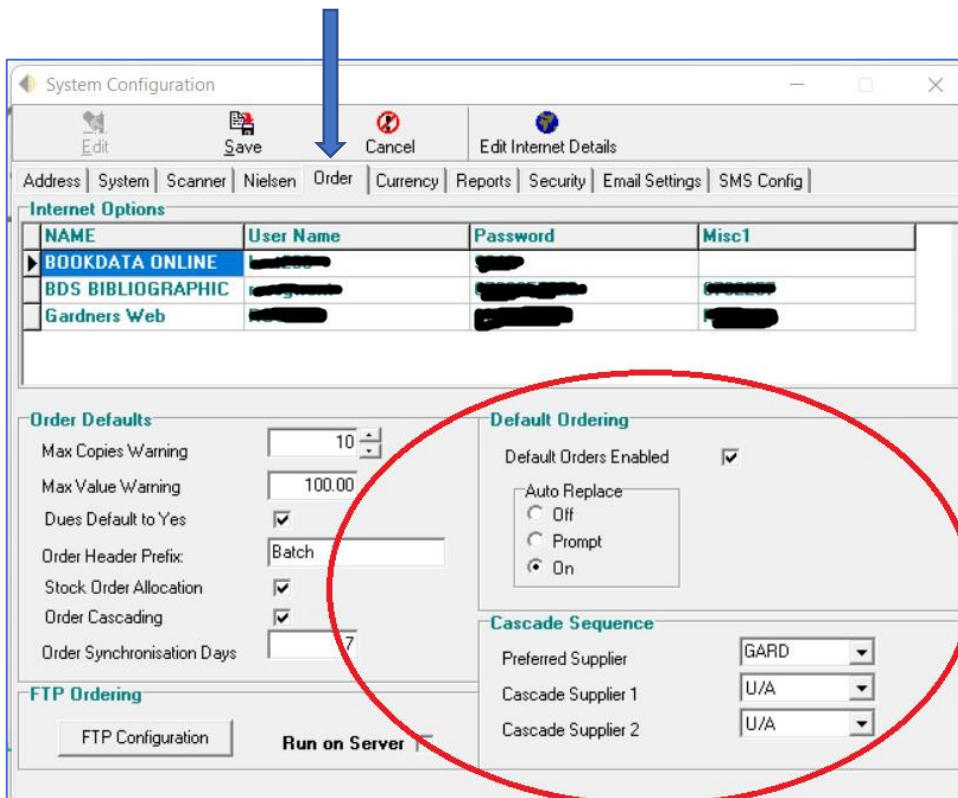
There are three settings:

1. **Default orders enabled**. If this is unticked no default orders will be created automatically and the option to create them is removed.
2. **Auto Replace.**
   a. When set to 'On' a default order will be automatically replaced on transmission.
   b. When set to 'Prompt', as soon as the order transmission is complete a prompt to create a new order will be displayed
   c. When set to 'Off' no order is created.
3. **Preferred Supplier.** The preferred (or default supplier) can be selected from this drop down. This will usually be Gardners.

Remember to click on 'Edit' to make changes in System Config.

5. Stock History

For each stock record in BatchLine there is an associated stock history. This can be useful for helping to understand the current status of a stock record. In the past the different types of transaction have been represented by a single letter, for example and S for a sale a G for goods in. This version has an additional description field to help make transactions easier to understand.

If you want to view stock history, go to the stock record of a title. The stock record is generally viewable from wherever you can see a title and the icon is always the same:
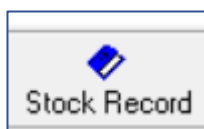
Once you are in a stock record, the stock history can be viewed via the History button:

And finally…

Shortcuts to BatchOne and Manuals

Two shortcuts have been added to the vertical menu in both Front and Back Office. 'BatchOne' links directly to the BatchOne portal, from where you can access Batch Payments, Batch Returns and BatchLine updates. The Manuals short cut links to the BatchLine area of the main Batch website (https://www.batch.co.uk/web/batchline/batchline-pos):

New icons
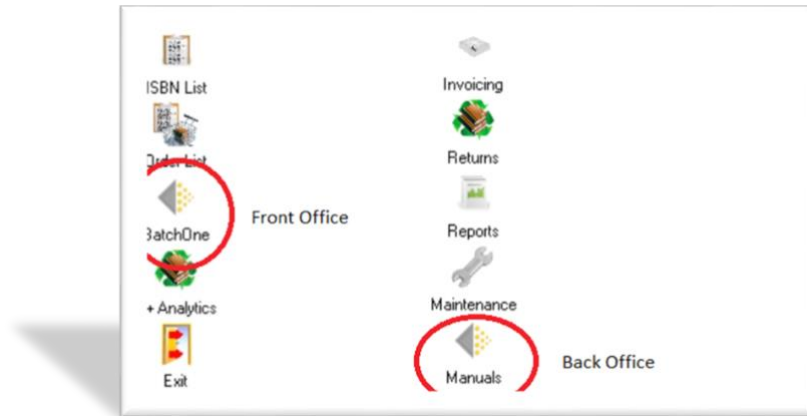
Clicking on BatchOne connects to your accounts at Batch, including Payments and Returns. The Manuals Icon connects to 'Batchline Features and User Guides', where we have manuals, guides and release notes:

New! This version includes BatchLine 4.68, which enables free integration of Open Bravo with **Dojo** Credit Card Machines for seamless customer payments.

Email mail@batch.co.uk **for details**

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

www.batch.co.uk