

# booklog news

Summer Edition 2019

A Publication from ComputerWorks of Chicago, Inc.

## Scanner Rentals

Plan ahead to make reservations for our hand-held inventory scanners. These scanners allow you to move through your store and complete inventory by section with ease.

For more information or to schedule a scanner rental, contact Debi at 800-977-8212 ext. 221 or [debi@booklog.com](mailto:debi@booklog.com).

## Updating Our Records

If you received this newsletter in error or would like to unsubscribe from it, please contact us at [www.booklog.com](http://www.booklog.com) or 800-977-8212.



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## A Personal Message From the President

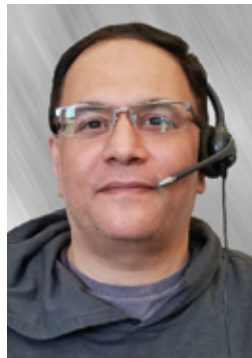
Greetings from Chicago and happy summer to all of you!

As you can read from the extensive list of New Features

outlined on pages 2 and 3, the wide range of upcoming classes being offered by our Training Department on the sidebar on page 2, and the ever helpful Tech Tips on page 4, our staff has been very busy throughout the winter responding to customer requests and to the changes in the technology associated with our industry.

Most of the older bookstores and now almost all of the new and expanding bookstores worldwide are already computerized, so we are constantly challenged to compete with other systems by providing current and prospective customers with the most state-of-the-art features and training to make selling and tracking as efficient and profitable as possible. Fortunately, we have been able to meet that challenge because of our loyal development, training, and tech support staff.

The most recent addition to our tech support staff is Yawer Ahmed, who joined us in October. Prior to joining us, he worked as a tech support analyst at Raja Foods and at Ernst & Young in the Chicago Tax Technology Department. Yawer obtained a B.A. in psychology from Loyola University Chicago and completed all the course requirements for an M.S. in management information systems from Webster University in Missouri.



Yawer is a first generation Indian American, born into a multi-cultural family of all faiths — Judaism, Christianity, Hinduism, and Islam. His grandparents migrated from Iran to India, and his parents, both of whom were born in Hyderabad, India, came to Chicago in the 1970s. His wife, Sireen, is a realtor, and together they have a 10-year-old daughter, Aliyana, and two 12-week-old kittens, Banjara and Chum Chum.

Yawer is a bit of a foodie and loves to experience new culinary adventures. He enjoys traveling, watching Bollywood movies, and playing sports, and hopes to ultimately retire in Hawaii.

When asked about his experience at Booklog, Yawer responded, "I am honored to be working with wonderful coworkers and bosses. They have been truly welcoming and very helpful. I feel like I am a part of a special family."

We are also pleased that Hale Keuthan has joined Wes Freeman in our Training and Implementation Department. The reorganization of that critical department is making a significant impact on the ability of new stores to get up and running on Booklog. It has also helped significantly in lowering the inevitable issues (and often frustrations) involved in learning a new system.

Should you ever have issues that you feel you'd like to address to me, personally, feel free to contact me.

My best wishes to each of you as we head into the summer 2019. I hope the uptick in the economy is having a positive effect on your business. Thanks for all of your support, and please continue to provide us with your feedback and suggestions for new features or just news of your store.

— Jean Fishbeck, president

## 2019 Booklog Online Training Classes

The Training and Implementation Department is proud to welcome Hale Keuthan, who previously worked in Booklog Tech Support for 11 years. On April 1, he began his new role, where he will be working with new customers during their implementation period. Hale will still be working with existing customers when they take online training classes or call with training issues. The Training and Implementation Department is lucky to have him!

Here is the online training schedule for the rest of the year. All class times are at 2:30 p.m. CDT. Classes are free to users with maintenance agreements; there is a \$100 charge per class for stores without a maintenance agreement.

### Sales, Inventory, and Customer Reports

July 25, 30; Nov. 26; Dec. 3

### Purchasing and Receiving

Sept. 3, 10; Oct. 15, 22

### Returns

July 9, 16; Oct. 1, 8;  
Nov. 26; Dec. 3

### Special Orders

Aug. 6, 13; Oct. 29; Nov. 5

### Customer Sales and Campaign Management

Sept. 17, 24

### Frequent Buyer Club

July 2; Nov. 12, 19

### Book Fairs

Aug. 20, 27

To sign up for any of these classes, please send an email to [training@booklog.com](mailto:training@booklog.com) and include:

- Your name
- The name of your store
- The class you would like to take
- The date on which you would like to take that class

## Booklog's New Features

Booklog version 16 is now available and contains many ease-of-use enhancements as well as options that will help keep your store up to date with customer technology usage patterns. In addition, there are a number of small enhancements not covered here. Please be sure to review the *What's New* and *Release Notes* documents for every release for a comprehensive list of changes. With a number of changes throughout the industry, Booklog version 16 has many improvements that are very important to keep your bookstore in line with these changes. We are devoting the majority of this newsletter to informing you about the many updates and new features.

### Emailing Enhancements

- When you click on the Email PDF icon from the PO Review report, the vendor's email address will automatically populate in the Email Report Confirmation window.
- When emailing receipts from the Receipt Reprint window, the Confirm Customer Email window will auto-fill the customer's email address associated with the sale.
- **Store Signature Lines** — You may designate default signature text that will be tacked onto any email sent (like when sending reports or receipt reprints). When the email confirmation dialog appears, the Message field will auto-populate with the signature.

### Text Message SO/MO Notifications

The Store Properties' SO/MO tab now has options to add text message notification to special orders and mail orders. This is independent of email notification, but complementary to it.

As long as you've collected cell phone and cell phone carrier data from your customer, you now have the option to notify them via text when their special order has arrived or their mail order is shipped or ready for pickup. The text message template, and the option to switch the feature on, is editable on the Store File SO/MO tab. Text messages are limited to 160 characters and, therefore, can't be customized by each order in as much detail as an email notification, but it will be a nice complement to email notification. The cell phone carrier is required to send a free text message, and fields on the Special Order and Mail Order headers have been opened up to enter/save the data to customer records, similar to the Cash Register Cell Phone and Carrier fields. Timber users will be able to collect this data from their website orders as well.

### Pre-Orders

Booklog now has a new process for managing pre-order items. These are items that you would order multiple copies of in advance of publication while continuing to accept customer pre-orders, which you would record in the Special Order module.

The new process isn't much different than the old in that you will still record customer pre-orders in the Special Order module. However, the change is that before you begin accepting pre-orders for this item, you would check a box in the inventory detail of the item to designate the item as a pre-order item. Then, as you receive customer pre-orders, the special orders will be marked as pre-order (mail orders are also pre-order aware). Auto-create PO has been modified to be pre-order item aware, and you may include or exclude pre-orders from any auto-create PO process. Finally, when you receive a pre-order item in receiving (receiving has also been made pre-order aware), it will ask if you'd like to fill pre-orders in an auto-allocate when you receive. Also, Allocate Stock to Orders has been modified so you may auto-allocate and include or ignore pre-orders.

### Cash Register

- The **Returns Not Allowed After...** setting in the Store File allows you to set a time period after which you do not accept returns. This setting only applies to customer returns made when using the scan-receipt/quick-return function or mail order returns. The default is 180 days. Change it in the Store File to match your store's return policy.
- **Require Customer for Payment Type** — If there is a particular payment type used (e.g., gift cards) that you want to require customer data to run the transaction, you may do so by setting this option on the payment type.
- Selecting a gift card in the Gift/Cert pick-list will now prompt the cashier for a confirmation. This should eliminate any problems with selecting the wrong card/certificate from this window.

### Frequent Buyer Programs — De-issuing Certificates With Customer Returns and Voids

Previously, Booklog would only deduct frequent buyer credits from pending values when a customer returned product or a transaction was voided. If a certificate was issued in a transaction, the certificate also was not reversed.

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## Booklog's New Features *(continued)*

With an option starting in version 16, Booklog can begin evaluating returned items in determining whether a certificate should be de-issued. If there are more returns on a transaction than sales, and/or the number of items in the return would trigger a certificate issue if the transaction were a sale, Booklog will look to de-issue the same number of certificates based on latest date issued. Since the rules and caveats regulating the de-issuing are somewhat complex, please review the *What's New* and *Release Notes* for version 16 for more comprehensive details regarding this important option. If this option is of value to you, our tech support can help you enable the feature.

### Mail Orders

- Scan ISBN window when fulfilling mail order items now takes into account alternate SKUs.
- The Ship field has been color coded and scripted to help ensure you do not over-ship items. The field will be red when you are currently shipping more copies than were ordered. The field will be grey when you already shipped all the ordered copies, and the field will be locked from further changes (except when refunding).
- When processing mail orders, you may now set default processing options that help eliminate the number of prompts and dialog boxes that pop up and auto-print reports. Options include eliminating the "Process Another Mail Order Sale?" dialog, auto-printing the shipment/fulfillment report, skipping email verification, and receipt preferences.

### Purchase Orders/Returns

- Users now have the ability to clone a PO from the PO pick-list. The state of the original PO isn't relevant to this feature, so you may duplicate any PO, whether it's still in draft, if it's in flux, or it's been closed for some time.
- **Reverse a PO to a Return** — PO reversals take all the items that were received on a specific purchase order and place them on a return. Use PO reversals when you accidentally posted a receiving session, or when all copies of items on a PO were received damaged.
- **PO By Item** — You can now set the Order From field to a single vendor for all items at once.
- You may now scan into returns.

### More Changes

- Import from Edelweiss into Returns.
- **The Customer Search window** has been changed to utilize a single phone field that will search all customer phone fields.
- **Utilities: Recalculate Out at Book Fair.** This utility will look at all finalized, non-returned books in book fairs, and recalculate the out at book fair totals in inventory.
- **Customer Reports:** Some customer reports that use a generic customer parameter window now have a new way to filter these reports by user-defined code. There is only one user-defined code field, but the report will search all four customer user-defined code fields. The selection field is also multi-selection aware, so you may select more than one user-defined code to filter by.
- **Retail pick-lists now refresh every two minutes.** This means that when other users in your store are adding documents and orders, like POs, mail orders, or special orders, you will begin to see these additions in the pick-list if you have these same pick-lists open. This should be particularly useful for Timber users, as new mail orders are added by Timber as they are created.
- **Campaign Management** — You can now pull transaction data by sales module.
- **End-of-Period Till Control Summary** — This has been available on the Register tapes, and now a new and slightly different summary has been added to the End-of-Period.
- **Memberships:** You can now edit the expiration date for an individual member's membership.
- **Customer email addresses** can now be up to 256 characters.
- **Special order deposit receipts** now show a total due after the deposit, as well as any applied discounts.
- **The Electronic Journal report** now has the option to view voided transactions on the report.
- **Promotions:** There is a new option for promotions — Always Use Master SKU. This makes quantity discounts more functional. If this option is selected, the promotion uses the master SKU to determine if items are eligible for the discount rather than using the item's own ISBN. This means that quantity discounts will accrue if you buy multiple items with the same master SKU.

- **Ability to run Tender Type, Credit Card Authorization, and Electronic Journal report by Remote Sales** only (requires the Remote add-in).
- **Special order/mail order notification** will not repeatedly notify customers when receiving in multiple receiving sessions.

### New Reports

- **Alt-SKU Listing** — Lists inventory that have alternate SKUs and their alternate SKU values.
- **Customer Bill-To Listing** — Shows customer bill-to relationships for store accounts.
- **Department/Category Sales and Inventory Summary** — Provides sales totals for Last Year, Year-to-Date, This Month, This Week, and Today as well as QOH and QOO totals by department and category (category only looks at the Category 1 value). The report is fiscal-year aware.
- **Return Discrepancy** — Shows the difference between the amount that you expected to receive back from a return and the amount that you actually received in all credit memos.
- **Security Profile** — Shows which features are permitted or restricted for each security profile.
- **All reports can be printed to a PDF.** This is handy when you want to email a report or don't want to use paper.

### Multistore Mail Orders and Timber

Multistore and Timber users now have the ability to automatically split web orders based on product availability over all sites, or selected designated fulfillment sites.

What this means is that when an order is received in Booklog Multistore from Timber, Booklog will evaluate the items on the order and choose the best site to fulfill each item on the order. The purpose of this is to eliminate the need to transfer stock between stores so orders can be fulfilled faster. In-store pickup orders will continue to be sent entirely to the chosen in-store pickup site, so some stock may still need to be transferred. However, this should help web orders flow more smoothly in a multi-store environment that fulfills web/mail orders — or wishes to fulfill web/mail orders — from multiple locations.

### Online Help Index

Help can be found under Help > Online Help Index. Also under Help you can find the instructions for any activated interface you have.





# booklog

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## Helpful Tips From the Booklog Tech Staff

Our tech support staff is constantly sharing with one another tips that they have passed on to customers. Below we would like to share some of these tips with all of you as a part of our commitment to helping you use Booklog as effectively and efficiently as possible.

**Windows Updates** — Keeping your operating system up to date is important. Please make sure that Windows updates are done on a regular basis. (Tech support suggests performing updates at least once a week.)

Check out the **Hide Closed** option for mail orders, special orders, and purchase orders.

**Create a PO From a Book Fair** — Go to the Book Fair pick-list and check the Book Fair. Click the Create PO icon and follow the instructions. All items will be added to the new PO.

Restrict cashiers from selling unreceived or unexpected copies with the **Sell Into the Negative QOH** setting in the security profile.

**The Register Sales tab** in Item Properties shows sales through the Mail Order window, not just the cash register. Use it to find what sold, to which customers, and in what quantities.

**The Staff Notes tab** in the Item Properties window tracks long, narrative information about a title, such as descriptions and recommendations.

**Are you looking to set up electronic ordering through Booklog with Ingram?** Just let your Ingram rep know that you would like to order with them through your POS system and they can set you up with the necessary credentials.

Managers should verify their staff's **security profiles** from time to time to make sure the appropriate areas of Booklog are visible or restricted.

Booklog has a **Standing Orders module** which integrates with the Mail Order module. The standing orders are requests from multiple mail orders, but can be used for many different types of repeat orders.

**Multi-Column Sort** allows you to sort Purchasing, Receiving, and Returns pick-lists by more than one column. This works like the Specify Sort Columns window in a report. It has a list of eligible columns from the pick-list on the left and a space for the sorted columns on the right. Drag a column from the right and drop it into the list on the left. The pick-list will sort by all of the values entered into the right-hand column, starting with the one on the top.

*Greetings from Chicago!*

