

# booklog news

Holiday Edition 2014

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## Upcoming Events

Booklog staff will be attending the following trade shows. Please stop by our booth to chat and ask any questions. We look forward to seeing you in 2015!

### **ABA's Winter Institute**

Asheville, North Carolina  
February 6–11, 2015  
Visit Booklog's Consultation Station:  
Tuesday, Feb. 10, 10 a.m.–4 p.m.  
Wednesday, Feb. 11, 10 a.m.–1 p.m.

### **BookExpo 2015**

May 27–29, 2015  
Javits Center, New York, New York  
Visit Booklog at booth #1946:  
Wednesday, May 27, 9 a.m.–5:30 p.m.  
Thursday, May 28, 9 a.m.–5:30 p.m.  
Friday, May 29, 9 a.m.–5:30 p.m.

### **International Christian Retailers Association**

June 28–July 1, 2015  
Orange County Convention Center  
Orlando, Florida  
Visit Booklog at booth #406

## Scanner Rentals

Our hand-held scanners allow you to move through your store and complete inventory by section with ease. These rent for \$300 per scanner for 10 days (plus overnight shipping).

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).



## A Note From the President

As I turned the page of my calendar from October to November, I paused for a moment and reflected upon how quickly 2014 was becoming history. Then I read the first draft of the New Features article in this newsletter, and thought, “hmmm, we’ve done a lot this year!” When I say we, I mean more than just our development staff. I mean *we* — Booklog and you, our loyal customers. For it’s only with your constant feedback of what works and doesn’t work, and your willingness and patience in working with us, that Booklog has been able to evolve over the past 31 years into the robust inventory management/point-of-sale system it is today.

“I thought of that” was the comment made by Matthew of Maryville University when he received the latest Booklog update. Matthew’s statement reflects exactly where the credit rests for so many innovations. In our mission statement, we “strive to help retailers maximize the effectiveness and efficiencies of their businesses ...” and are “dedicated to developing and maintaining a strong and satisfied customer base.” This can only happen when we, as the provider, and you, as the customers, work together. Thanks so much for all your input.

I want to thank our loyal and dedicated Booklog staff members as well, for they are the ones who listen to your suggestions and work hard and creatively to implement them. As I thought about our Booklog staff, I glanced

at the latest roll of employees and was pleased to have factual confirmation of that loyalty — 60% of our employees have been with the company for at least 10 years, and 85% of them have been with us for over five years. This has contributed to our ability to maintain, expand and innovate as much as we have.

Atop this list of long-term employees is David de Castro, who began working with Booklog back in 1993. Working for one company for 21 years in the technology industry is quite rare — a much-appreciated example of dedication and loyalty. From his role as a friend who just helped out answering the phones to director of sales and marketing then director of technology to his role as senior vice president, David has performed almost every role there is at Booklog. His work has been key to the long-term as well as day-to-day development and promotion of Booklog. Also, his ability to develop relationships with outside partners has been invaluable. Without David, Booklog would not be the software it is and the company might not have survived all these years.

Kudos, also, to every one of the other 22+ Booklog staff members who have provided so much knowledge and commitment to the Booklog software that you are all using today. Hardly a week goes by without our receiving comments from customers extolling the patience and commitment of our tech support staff. They listen, offer advice, and then pass on suggestions from their conversations with you to our development and quality assurance staff.

We have just celebrated Thanksgiving and I want to take this opportunity to thank all — you and our dedicated staff — for the wonderful partnership we have. And as we approach the upcoming holiday season and the arrival of a new year, my very best wishes to everyone. May 2015 be a good year for all!

— Jean Fishbeck, president

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## Booklog Tech Tips

- Do you need a report that lists all the transactions for a period of time? Check out the Electronic Journal report. It will list the transactions in one tidy report so that you don't need to do a number of receipt reprints.
- Have you ever found two items that you want to merge into one new, improved item, but you want to keep the sales and ordering history intact? You can do this now with the Manual Inventory Merge. Go to Utilities > Merge Inventory > Manual Inventory Merge. Enter the two ISBNs you want to combine and you can create an all-new ISBN (or use the same one). You'll even get a preview of how the new item will look.
- Did you know that in version 11 you can email copies of your reports directly from Booklog? After you've created a report, click on the envelope icon at the top of your screen. You'll be prompted to enter the recipient's email address and you can enter a short message to accompany the report. You need to have Booklog PDF Writer installed and have your SMTP information configured. Just talk to Booklog tech support if you have any questions.
- When running reports you can use the Parameter window to specify what you need; however, after the report is created, you can also use Filter and Sort to customize the report even further.
- Did you know that you can take a special order deposit and sell items to a customer at the same time? To do this from the cash register, click Edit > Add Special Order or ALT-F2. The Special Order window will come up so that you can enter the deposit amount. Then you can continue entering additional products to the cash register sale. This is especially handy when the customer wants to pay with a credit card.

## Customer's Corner

*In this issue of Booklog News, we are pleased to feature Phoenix Books, two stores located in Essex and Burlington, Vermont. The Essex store has been a Booklog customer since May 2007 and the Burlington store since March 2012.*

The event was so popular that the bookstore had to enlist the 500-seat First Unitarian Universalist Society Meeting House for its reading and book signing with Elizabeth Warren, the senior U.S. senator from Massachusetts and author of the recently released best-selling memoir *A Fighting Chance*. But that's not an uncommon occurrence for Phoenix Books, located in Essex and Burlington, Vermont. Phoenix's commitment to literacy and community involvement is noteworthy throughout the state of Vermont.



With approximately 8,000 square feet of selling space and over 10,000 titles over the two stores, Phoenix Books is the second-largest indie bookstore in the state of Vermont. The Essex store is smaller, but with its full-service café and art gallery, it has become a one-stop shopping center in the community of approximately 18,000 people. The larger Burlington store serves a community of a little over 42,000 — the largest city in the state of Vermont.

The 25 full- and part-time employees are committed to keeping dollars in the community, and making environmentally responsible choices in every step of the stores' choices. Each and every member of Phoenix's staff is passionate about books and about their community, and are always happy to make individualized recommendations, whether one is looking for a great read or a custom-made latte.

Owners Michael de Santo and Renee Reiner have been in the book business for over 20 years. They both worked at the former Bookrack and Children's Pages store, which they sold 10 years ago, and then at

the Essex and finally the Burlington stores. When the Burlington edition of Borders Books closed its doors about 2½ years ago, Michael and Renee sensed that Burlington was barren without a bookstore, and opened their second store using the community supported bookstore model. That model involved investments from a wide range of other community groups and individual supporters, and it resulted in Phoenix Books becoming the community center for literacy in Burlington. Phoenix Books also adds to the community by co-sponsoring a number of events with the public library and carrying a wide range of products from other local businesses. And it has become a part of the "buy local" effort, supporting the local purchase of food, beer and cheese.

Phoenix was voted the best book store for the last two years by the weekly entertainment publication *Seven Days*. Book clubs and other programs for readers of all ages fill the stores' weekly calendars. Phoenix Books for Kids, via a partnership with the Fletcher Free Library's summer reading program, will distribute free books to the approximately 1,400 children expected to take part in the summer reading program this year. Phoenix Books for Kids also aims to establish permanent libraries of 40 or so titles at each of the summer reading program's many satellite locations.

When asked about Booklog as its inventory management and point-of-sale system, Tod Gross, manager of the Burlington store, quickly responded, "We really appreciate the ease of the system and the wide range of reports offered by the software."

All of us at Booklog are pleased to have Phoenix Books as a part of our Booklog family. We wish Michael and Renee and their entire staff continued success as they provide the Essex and Burlington communities with opportunities to meet and learn from outstanding authors and artists, and serve as the literary centers for their respective citizenry. We hope you'll stop by if you're ever in the area.



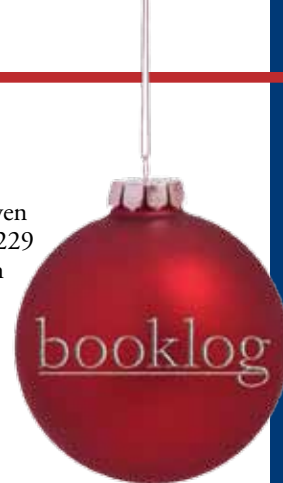
## Season's Greetings and Holiday Savings for Booklog Customers

All of us at Booklog wish you and your entire staff season's greetings and best wishes for a joyous New Year!

In appreciation of your support and encouragement throughout the past year,

we are pleased to offer you 10% savings on all Booklog standard version software purchases. This includes interfaces, additional licenses and upgrades purchased by December 31, 2014.

Please contact Gwen at 800-977-8212 ext. 229 or [gwen@booklog.com](mailto:gwen@booklog.com) for more information.



## Booklog's New Features and Enhancements

For a single-point release, version 11.1 of Booklog packs in a large number of features and enhancements.

### Membership Module

You can now set up and sell multiple membership programs in your store and tie the memberships to either a frequent buyer club or promotional pricing program. Memberships can be defined as having a duration of a specific number of days or years, along with an option for renewal behavior as well as the ability to alert the cashier of an expiring membership. This module has been fully integrated into campaign management, so you can target members for specific promotions or communications, alert them to their expiring and pending renewal dates, or thank them for their new membership or renewal. Customer reports are also filterable by membership.

The Membership Module is a paid, add-in feature. Please contact your Booklog representative for more information on how to purchase this new module.



### On Account Payments to Specific Invoices

A frequent request has been to tie payments on account to specific transactions. Enabling this feature in the store file will allow your cashiers to tie account payments and adjustments to a previous transaction ID from within the customer record. All payment, debit and credit activity is tracked by transaction ID so your customers will know when a specific transaction has been paid off. A new Customer Statements by Transaction report shows each outstanding transaction and any payments tied to the originating transaction.

### Non-decrementing Inventory Items

Inventory items can now be set as “non-inventory” items — when they are sold in the cash register, the quantity on hand will not increment or decrement. This is handy for any item you wish to track sales for but not inventory, such as ticket sales, bus passes, stamps — any item you may have previously sold as a department sale. You can still set a specific price and cost for the items in order to track income and COGS, but the quantity on hand will never change.

### Sell Gift Cards in Mail Order Module

Booklog now offers two ways to sell gift cards in the Mail Order Module. One is through sales originating on an ecommerce website that are then imported into Booklog and automatically added to a mail order. The other is through the standard gift card sales process, entered on new lines in the mail order. If you are familiar with gift card sales in the cash register, you will be familiar with this standard procedure.

Starting in version 11.1, you will be able to:

- Flag item records as gift card placeholders.
- Import gift card mail order placeholders from ecommerce sites.
- Convert the gift card placeholder items to active gift cards through the Mail Order Module.
- Sell standard gift cards in the Mail Order Module.
- Run a Gift Cards by Card Amount report.

### Direct-to-Home Ordering with Ingram

The new Direct-to-Home feature allows your customers to receive home shipments of books that you don't have in stock. It's an alternative to having the customer come back to the store to pick up a special order, or receiving the order into the store and then shipping it out. An advantage of Direct-to-Home is that the customer will get the books quickly because they are sent directly from Ingram's warehouse, rather than going to the store and then to the customer.

Direct-to-Home uses the Mail Order window to create orders that are electronically sent to Ingram. The books are sent directly from Ingram's warehouse to the mailing address that you designate in the Mail Order Entry screen. When the books are shipped, you will receive an email notification and an EDI response that will allow you to close out the PO. Ingram will invoice you for the books and the shipping.

### New Customer Record Features

- **Birthdays** — Record and track your customers' birthdays for in-house birthday promotions or targeting.
- **Special Orders Tab** — Review your customers' special order history and status from the customer record.
- **Multiple Notes** — Add more than one note to a customer record. Notes have their own tab in the customer record and the notes tab text will change to blue when a note exists for that customer.
- **Alert Cashiers With a Special Message** — When you add a message to the Alert Message box in the customer record, your cashiers will be prompted with that message each time that customer is added to a transaction.

### Miscellaneous Enhancements

- **Pick-list Window Enhancements** — All pick-list windows are now enabled for window minimizing and maximizing so that you can take advantage of full-screen space, column resizing and mouse-wheel scrolling.
- **Add Color to User-Defined Code Labels in the Cash Register** — You can set user-defined codes to use a specific label color in the cash register.
- **View and Print the To-Be-Ordered and To-Be-Returned Pick-lists** — The TBO and TBR pick-lists are now available for viewing at any time from the Inventory window. Print the lists from these pick-list windows as well.

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# booklog

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## Season's Greetings!

### Booklog's New Features and Enhancements *(continued from page 3)*

- **Require a Customer Entry in the Cash Register** — A new store file option allows you to require your cashiers to tie a customer to every sale, or sales that only involve gift cards, and/or only sales that include department sales. You can also set only certain departments to require a customer at the time of sale. This latter option also restricts any inventory item belonging to the department, rather than just department sales.
- **Refund Mail Orders to Pre-Authorizations** — If you pre-authorized a mail order, Booklog will not keep the credit card on file to process the refund to, but rather Verifone and Payware Connect will have a record of the token and Booklog can use that token to process the refund.
- **RedShelf Textbook eBooks** — College Edition users are now able to sell RedShelf textbook eBooks. Import, localize, adopt and sell the RedShelf catalog the same way you do the eFollett catalog. This new feature is a paid add-in. Please contact your Booklog sales rep for details.

#### New Reports

- **Frequent Buyer Detail by Customer Report** — This report displays all items that were counted toward a frequent buyer certificate.
- **Inventory Detail with Sales Report** — This is a hybrid report of the Inventory Detail and the Sales reports. It shows sales information for the specified period for all inventory — even those items that never sold during that period.

- **Gift Cards by Denomination Report** — This report shows gift cards purchased within a date range by denomination. You can see whether customers are buying smaller or larger denominations.
- **Vendor Performance Report** — This report shows sales, purchases, fill rate, turnover, gross margin dollars and gross margin percentage for a comparative period for a single vendor.

#### EMV Credit Card Processing

Booklog fully supports EMV NFC (near-field communication) contactless payment with Verifone Payware Connect and Verifone's MX 915 or 925 devices. We will be developing for EMV chip-and-pin on this platform in the coming year, and are exploring other options for stores where the Verifone solution is not cost effective. However, anyone with Booklog and the MX devices are currently able to process transactions with EMV NFC-enabled cards, Google Wallet, or any other NFC electronic wallet. (This supposedly includes Apple Pay, but we have yet to test Apple Pay ourselves.)

#### Payware Connect Alternate URL

It is a very rare occurrence when the primary Payware Connect URL goes down, but if it does, there is a backup URL that can be set in Booklog. When this URL is inserted into the Secondary URL field on each workstation that processes credit cards, Booklog will automatically utilize it if the primary URL is not accessible.

#### To configure your workstations:

- Select Maintenance > Workstation. The Workstation Pick-list will open.
- Locate the current workstation and double click to open it.



- Click to select the Payware tab.
- The Payment Engine Location field should already be populated with **<https://ipcharge.net/IPCHAPI/rh.aspx>**
- Go to the Secondary URL field and enter **<https://ipcharge2.net/ipchapi/rh.aspx>**
- Select OK to save the change and exit this screen.

#### Promotional Pricing Options

Especially during the holidays, promotional pricing options can allow your store more flexibility with automated sales. Remember that you have the ability to apply promotions based on customer attributes such as frequent buyer club, user-defined codes or customer purchase habits. Promotions also can join the Category/Department and Vendor tabs by And or Or options; and you can filter a promotion by current quantity on-hand values or an item's last sold date. Another option allows you to set a fixed price instead of a sale amount or price, so you could have a "bargain bin" where all the items in the bin are priced the same.

The combination of promotional pricing options should allow you to set up tiered promotions. For example, you could set up one promotion for 5% off for any customer, another promotion for 10% off for customers belonging to a frequent buyer club, and a third for 15% off for customers belonging to a frequent buyer club that also made a previous purchase in the last three months.