

booklog news

Holiday Edition 2017

A Publication from ComputerWorks of Chicago, Inc.

Upcoming Booksellers Events

WINTER INSTITUTE

Sheraton Hotel and Memphis Cook Convention Center, Memphis, Tenn. January 22–25, 2018

BOOKEXPO AMERICA (BEA)

Javits Convention Center, New York City, N.Y. May 30–June 1, 2018

CHILDREN'S INSTITUTE

Sheraton New Orleans, New Orleans, La. June 19–21, 2018

INTERNATIONAL CHRISTIAN RETAIL SHOW (ICRS)

Gaylord Opryland Hotel & Convention Center, Nashville, Tenn. July 8–11, 2018

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.

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A Personal Message From the President

Booklog is celebrating its 35th anniversary in 2018. From a program that ran on a 5-1/4" floppy in the a:drive to one that is communicating with credit card companies and vendors via the cloud, there's been a significant transformation. I still remember the faces and names of our first 100 customers, and how pleasurable it was to discover what special people went into bookselling. One of our first customers was Gail See from the Book Case in Wayzata, Minnesota. As president of the ABA, she felt that she should help lead the way to a new era, while the majority of booksellers adamantly shied away from computerizing, as they believed that using a computer would alienate customers. (It probably did initially.) I'm happy to say that many of our earliest users are still with us today, and to them we will always be grateful.

Through some strange quirk of fate, though Booklog is 35 years older, I personally only aged ten years since 1983. Keeping this in mind, I am led to share the following story of my latest adventure.

Last December I discovered pickleball. For those not familiar with it, it's a sport that's a cross between tennis and table tennis. It's played on a court much like a tennis court but a third smaller, using a racquet the size of a racquetball racquet but solid like a ping pong paddle (no strings). The ball is like a wiffle ball and just a little larger than a tennis ball. I've come to love the game. It's fast and challenging, a lot of fun, and pretty good exercise!

So I got home from the U.S. Open tennis tournament in NYC late Wednesday night on Sept. 6. As a former tennis player, I was very energized from a week of watching terrific tennis. Though we didn't play any

tennis ourselves, we got a lot of exercise by walking as much as eight miles a day. I spent Thursday recovering from the trip and getting back to my normal Chicago routine. By Saturday, I was anxious to translate what I had seen on the tennis court onto the pickleball court. I woke up at 6:30, fed and walked the dogs, and headed to the pickleball courts. It was a beautiful, sunny day.

My regular pickleball partner introduced me to two young Northwestern students and we took to the courts. They won the first two games 11–1 and 11–2. Though we were getting beaten badly, I felt that my game had definitely improved from all the tennis watching. Someone suggested we mix up the teams, one senior with one youngster. About seven points into the game, I went back for a lob, essentially running backwards. As I was stretching to reach the ball, I realized and thought, "oh, oh, I'm falling." I put my hands behind me and began my, I assume, less-than-graceful fall. The next thing I knew, I was in the E.R. of the closest hospital with two broken wrists and a fractured back. All I could think about was that I wouldn't be able to play pickleball on Monday. Little did I realize that there were countless numbers of things I wouldn't be able to do in more than just the following week! After surgery on both wrists and a temporary brace for my back, I began the journey to recovery.

I am hoping that sometime after the holidays, I will have completed enough physical and occupational therapy to at least begin hanging out with my pickleball friends again. The Moral of the Story: "You can teach an old dog new tricks, but don't run backwards to hit an overhead lob!"

All that said, I want to take the opportunity to wish you all very Happy Holidays and a Joyous New Year, and thank you for all your support over these 35 years. Your suggestions throughout the years have made Booklog what it is today (along with a few technological innovations!). And I want to express particular best wishes to our Booklog family of booksellers and their customers living in those states and territories impacted by hurricanes Harvey, Irma and Marie.

— Jean Fishbeck, president



Training Tips

Slow Sellers Report

Booklog has many sales reports, but over the years many customers have asked us for a report that would show what items in their inventory AREN'T selling. In the past, we could always recommend running an auto-created return using the "slow sellers" selection method and using that as a report. But ever since version 13, slow sellers have their own report. When you run the Slow Sellers report, you can see all the items in your inventory you haven't received in a while that haven't sold well over the last few months. The report lets you choose how old the items are that you report on, how few you have sold, and over what amount of time. You can even sort the items by ISBN, title or author.

POs by Item

What if you could make a grocery list of items you need to order, then push a button and have Booklog turn your list into purchase orders. If you haven't used the POs by Item function yet, then that's just what you're missing. To use POs by Item, go to Inventory > POs by Item. Then start making your list. You can save the list and build it up over time. As each item goes on the list, Booklog shows your Vendor 1 selection as the vendor from which you would like to order, but you can change that so that you're ordering from a distributor instead of a wholesaler, or vice versa. When you're ready to start ordering, click the Create POs button and Booklog will create a PO to each vendor in the list. You can also make a POs by Item list by running the Restocking Worksheet and sending the items you need to restock to POs by Item.

Loading a List of Titles Into a Promotion

Looking for ways to speed up creating promotions? When creating promotional pricing events, you can now load a list of items from a text file. Click on the Import button in the Titles tab of the Promotional Pricing Detail, and Booklog will allow you to select your list. Booklog will automatically skip any items that are already attached to a running promotional pricing event. If it runs into a new item, Booklog will give you the option to auto-import the title information.

Customer's Corner

In this issue of Booklog News, we are pleased to feature BookStacks, located in Bucksport, Maine. BookStacks has been a Booklog customer since December 1999.

Andy Lacher, the founder and owner of BookStacks bookstore, remembers well the words of Andrew Young, the U.N. Ambassador under President Jimmy Carter, at a book convention in Chicago a number of years ago. Young stated to the conventioners, "people who write and people who read change the world. And you people, you booksellers, are instrumental. You put the two together." Ambassador Young's statement indeed represents a significant part of what independent booksellers such as Andy do every day.

BookStacks is among the bookstores across the country who serve as local institutions that bring together "those who write and those who read" through their ongoing schedule of author readings and book signings, and in so doing, stimulate the intellectual dialog that so often fosters individual and community change.

Even though there is a large independent bookstore — with many more titles — in Bangor, Maine, just 15 miles north of Bucksport, many locals looking for a new book, a good cup of coffee, or a bottle of fine wine prefer to shop in their own backyard. Many of them actually come in just to pet Andy's cat, Leo.

The town of Bucksport is located on the rugged coast of Maine and has a population of around 5,000. Historically, Bucksport was known for its papermaking industry, but coincident with the increase in virtual communication, that industry is no longer present. A major feature of the town is the downtown waterfront area, which offers many recreational and business opportunities. A recently opened Lighthouse Arts Center is drawing more visitors and prospective customers to the downtown area.

Andy is a longtime bookstore enthusiast. He started selling books in 1984 as a clerk at Mr. Paperback in Brewer, Maine. He eventually became a store manager and then the book buyer for the whole chain of Mr. Paperback stores. Soon after Andy returned from the booksellers convention in Chicago, he saw a notice on a vacant storefront on Main Street in Bucksport and mused to himself that he just had to try owning his own bookstore. He made plans, borrowed money from his family and a local bank, and, as is often said, "the rest is history."

In 2003 he started selling coffee at a little coffee bar, and in 2013 opened a fine wine section. Last May, Andy purchased the building — a clear indication that he is committed to continuing his long-lasting love of bookselling and his commitment to the Bucksport community.



The brightly decorated bookstore includes approximately 1,600 square feet of display space for over 8,000 book titles, the coffee bar and the wine shelves. Andy and his three part-time employees are always eager to find just the right book or the right wine for the right customer in their small community — and for visitors looking for a good book and bottle of wine while on summer vacation. Among the featured is an interesting section of books about the state of Maine and books by Maine authors.

A monthly book club and holiday gatherings for children, such as the Scary Stories at Halloween and a visit from Mrs. Santa at Christmas, are among the fun times for the store's readers of all ages. Mystery writer Tess Gerritsen and novelist Richard Russo are among the authors who visit the store for author readings and book signings. Andy commented, "Tess visits the store every time she has a new book."

Andy chose to install Booklog 20 years ago when he opened the store because "I knew that I didn't want to keep track of my inventory on cards, and Booklog seemed like a good fit for me." The staff at Booklog truly values its longstanding relationship with BookStacks, and wish Andy and his staff the best as they continue to do what they love doing — selling books. It's our pleasure to support local indie bookstores such as BookStacks.

(Some information for this article was taken with permission from a July 11, 2017, article on BookStacks 20th anniversary by David Roza of the Ellsworth American newspaper.)

Booklog's New Features

Booklog version 14.0 is our fall 2017 release and its focus is primarily on trade market functionality. It is packed with many small tweaks and a lot of impactful new features. Be sure to read the Release Notes and What's New documents for complete listings of new features and enhancements.

Merge Specific Customer Records

Select specific customer records to merge together. Rather than a "blind" merge of two customers based on customer ID through the Merge Customers utility, use the new Manual Merge Customer feature to select two records to merge.

Min/Max Quantity for Discount in Promotions

This new promotion feature allows for buy one/get one type functionality. A discount is applied only when a minimum quantity of an item is purchased or until a maximum quantity is reached. An example of this new feature would be when you want to implement a promotion such as "buy 3 pencils and get 1 pencil free." Your cashier would enter a total quantity of 4 pencils and a 25% discount would automatically be applied, or she would scan each pencil separately, and on the fourth scan, a 25% discount would be applied to each line with that pencil to give an effective 100% discount on one item. Another use case is the maximum quantity option, where you want to limit the quantity a customer can purchase at the discounted price. In this scenario, after 4 pencils have been scanned, you no longer give a 25% discount — the fifth pencil (of the same SKU/ISBN) is sold at full price.

Email Customer Statements

You are now able to specify in the customer record if a customer will accept emailed customer statements. When you generate your statements as you normally would, the Mail icon in the toolbar of the Customer Statement Report Preview will pop up a dialog box notifying you that customers who have elected to receive emailed statements will receive them electronically. Customers whose records do not have this option selected or do not have email addresses will be printed at the end of the process.

There's also a new Statements tab in the Store File that allows you to customize the default introductory email message sent to your customer along with their attached statement. In addition, you can define the default for new customer records to either send emailed statements or not (initially,

the default is no). One last option is the ability to limit the number of emails sent out so that you can avoid spam filters and detectors. (This feature requires your SMTP settings in the Store File to be active.)

Correcting Average Cost

Booklog version 14.0 includes a new function that will allow you to correct an average cost by simply adjusting the average cost in the inventory detail, and then saving the change. If you enter a corrected average cost in the Average Cost field, Booklog will use the corrected value when recalculating the average cost going forward. This corrected value overrides the receiving cost for all invoices on the same day as the adjustment or before.

IndieCommerce Booklist Export

(paid add-in feature)

This feature allows you to export a booklist to upload to your IndieCommerce site and/or FTP it directly to IndieCommerce. IndieCommerce recently came out with a non-book inventory upload as well, which we are currently in development to support. The non-book upload from Booklog is not available at this time, but will be included with this add-in feature when complete.

Standing Orders Module

(paid add-in feature, currently in beta)

A standing order is an on-file customer order that repeats on a schedule, like a Book of the Month Club. With this new functionality, you have the option to add a standing order placeholder item that stands in for a product that you'll use to fulfill your orders (e.g., "Batman comic" or "Book of the Month"), or you can simply create orders that always repeat with the same items (e.g., a paper towel refill). For standing order types that have placeholder items, you can specify which item replaces the placeholder item when the orders are fulfilled (e.g., "Batman vol. 2 no. 22" or "To Kill A Mockingbird"). You can also specify a standing order type's schedule as being monthly, bi-monthly, or even every third Tuesday of the month, etc., or simply as on-demand. In addition, you are able to set how long the standing order should remain in effect before it is auto-expired.

Once you have set up these configurations, you may begin accepting standing orders from your customers. When you do, you can accept a credit card for card-on-file, or charge to on-account when they are shipped. You can also specify that a customer will pick up in-store when their standing orders are fulfilled. Periodically, at your discretion, you can generate all the

standing orders that have been scheduled, only the standing orders of a particular type (i.e., subscription), those that have been scheduled for a specific ship date, or generate a single order. All standing orders create finalized mail orders which you can process through the Mail Order Module, or through a mass-process window that automatically processes to the card-on-file and/or on-account, and generates the required receipts, picking lists and packing lists.

Other Miscellaneous Changes:

- The Change Password utility was moved out of the Maintenance menu and into the File menu for more appropriate access by any user, rather than granting all users access to the Maintenance menu in security.
- Binding Types is now a defined pick-list available in the Maintenance menu, and a fixed pull-down menu in the inventory detail.
- The Frequent Buyer Program can now be set to withhold the application of remaining credits to "pending" when a certificate is triggered.
- Search and sort line items in a book fair.
- The Square export now has an option to export the QTY to Square.
- Special orders have the Discount and Tax icons added to the toolbar.
- The To Be Ordered Items window includes list and cost.
- Load a scanned/compiled list of ISBNs/SKUs into POs by Item.
- Add a stock number to received items in the Receiving Invoice & Packing List Wizard.
- Line consolidation options in returns.
- Mail Order Summary report, when sorted by Item + Status, includes an open-to-buy field showing how many copies you will need to fill from on-hand that are stocked or out.
- Handheld Device report includes more filter options. Particularly, if you're using the Ad Hoc Inventory window, there is now an option to run your Handheld Device report by location.
- Sales reports now have a taxable option that allows you to choose items based on whether or not they were taxed at the time of sale.
- The new Comprehensive Financial report shows a summary of activity that your store has tracked in Booklog. It aggregates the transactions by either department or category, and shows you any discrepancies between the expected value and the actual value captured in the end-of-month processing.



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Season's Greetings!

What's New From Our Tech Staff

Looking for Information on How to do Something in Booklog?

Check out the online help files by going to Help > Online Help Index or Help Index.

Booklog Has a Control & Scroll Feature

This allows the size of the text in most fields to be zoomed in or zoomed out. You can use this feature when in a window in Booklog by putting your cursor in a field, holding down the CTRL key on your keyboard, and using the mouse scroll to make the text bigger or smaller.

Check Out Some of These Reports:

- **Unsold Items by Department** — This report shows which departments have sold poorly over a date range. The report counts the number of items in the department and then shows how many of those items did not sell during the selected period.

- **Void Audit** — This report shows all the transactions that were voided within a selected time period. The report shows the name of the cashier who processed the void, the register, and the reason for the void. It also shows information about the original transaction, such as the customer name and the items' ISBNs and titles.
- **Returns Eligibility Expiring** — This report shows all retail items that are eligible to return to the vendor. You can use the parameter filters to identify which items need to be returned first, based on the date that they will become ineligible to return to the vendor.
- **Customers to Merge** — This report is a list of all customers' records that will be merged using the Merge Customers by Student ID feature. Use this report before merging customers.

- **Register Refunds** — This report shows all refunds (items returned to the store through the register) within a selected date range. Grand totals at the end of the report show the number of refunded items and the value of the refunded amount.

Manually Changing Quantity on Hand
This should **NOT** regularly be done in Booklog. However, sometimes it's necessary. If a reason is required to be given at the time of adjusting the quantity, it makes reconciling quantity discrepancies that much easier. To turn on this feature, go into Maintenance > Store and on the Defaults tab, make sure Require Inventory Adjustment Reason is turned on. When this is checked, you'll be prompted to enter a reason for changing the quantity on hand and you'll also see a new tab in inventory called Adjustments.

Season's Greetings and Year-End Savings for our Very Special Booklog Customers

In appreciation for your support and encouragement throughout the past year, we are pleased to offer you a 10% savings on all Booklog standard version software purchases, interfaces*, additional licenses and upgrades made until January 31, 2018. For more information, contact Gwen at 800-977-8212 ext. 229 or gwen@booklog.com.

* Note: this offer excludes the purchase of any EMV-related interface.

