

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:

9781785947155	Delia's Complete Cookery Course	Smith, Delia	H	26.00	26.00	26.00	BBC Books
9780563539070	Delia's Complete How to Cook	Smith, Delia	H	45.00	37.00	45.00	BBC Books
9781409071921	Delia's Complete How to Cook	Smith, Delia	O	38.61			BBC Digital

Prompt:

Confirm

 Update stock price for 9780563539070 'Delia's Complete How to Cook'?
Current Rrp £37.00
Gardners Rrp £45.00

After:

	H	26.00	26.00	26.00	BBC Books
	H	45.00	45.00	45.00	BBC Books
	O	38.61			BBC Digital



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 available Gardners price.

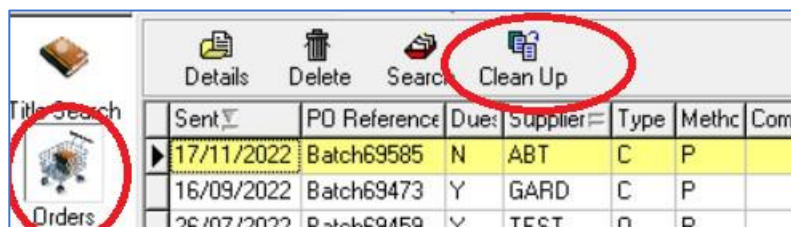
	C	RRP	Stk RRP	Gard RRP	Pub Na
	P	6.99	6.99	6.99	The Bit
	H	4.99	4.99	-	Queen
	H	12.99	12.99	12.99	BBC Bo
	H	6.69		12.99	BBC Bo
	H	12.99		12.99	BBC Bo
	P	19.00		-	Hachel
	P	16.99		-	Hodder
	O	14.99	14.99	-	BBC Bo

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.

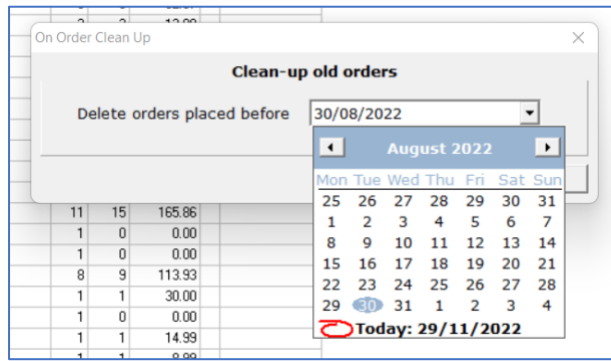
Note: Please consider doing a 'just in case' backup prior to this procedure. Give the back up a unique name such as 'orderCleanup'.

This new function is available as a button on the On Order tab of the Orders menu:

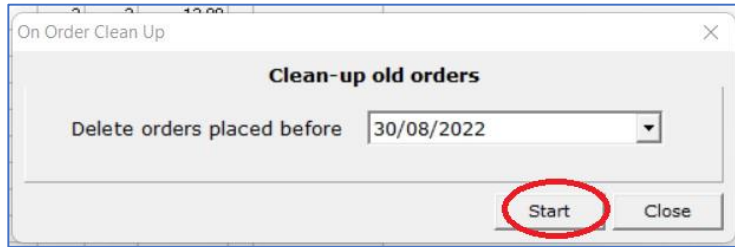


Clicking the button will display the 'Clean-up old orders' menu. By default, the date displayed is 3 months from today's date. It is not possible to select a date more recent than this date. To start the process:

- 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	<input checked="" type="checkbox"/>	Shop Order Type :		<input checked="" type="checkbox"/> Use Last Delivery Supplier										
CSQ#	Title#	Pub#	Author#	Bg	Price#	Sup	QTD	Core	Stat	QoH	C	SQaD	QoO	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	<input checked="" type="checkbox"/>	Shop Order Type :		<input checked="" type="checkbox"/> Use Last Delivery Suppl								
Pub#	Author#	Bg	Price#	Sup	QTD	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 Book	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	O	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:

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

Date	Supplier	PO Reference	Dues	Lines	Books	Value	Estimated Cost	Supplier Discount	Min-Ord	M	Ack	Shop Type	Promo ID	Comment	BNM	C	BT	Default
29/11/2022	GARD	Batch69589	Y	0	0	0.00	0.00	35.00	0.00	B							C	3

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:

The screenshot shows a 'Purchase Order' window with the following fields:

- Order Ref: Batch69546
- Shop Order Type: []
- Date Raised: 22/09/2022
- Order Type: [0]
- Dues Flag: [Yes]
- Transmission Method: [Email]
- Supplier: [Pearson]
- Default: [Not a Default Order]

The 'Default' dropdown menu is open, showing the following options:

- Not a Default Order
- Stock default Order
- Customer Default Order
- Single Default Order

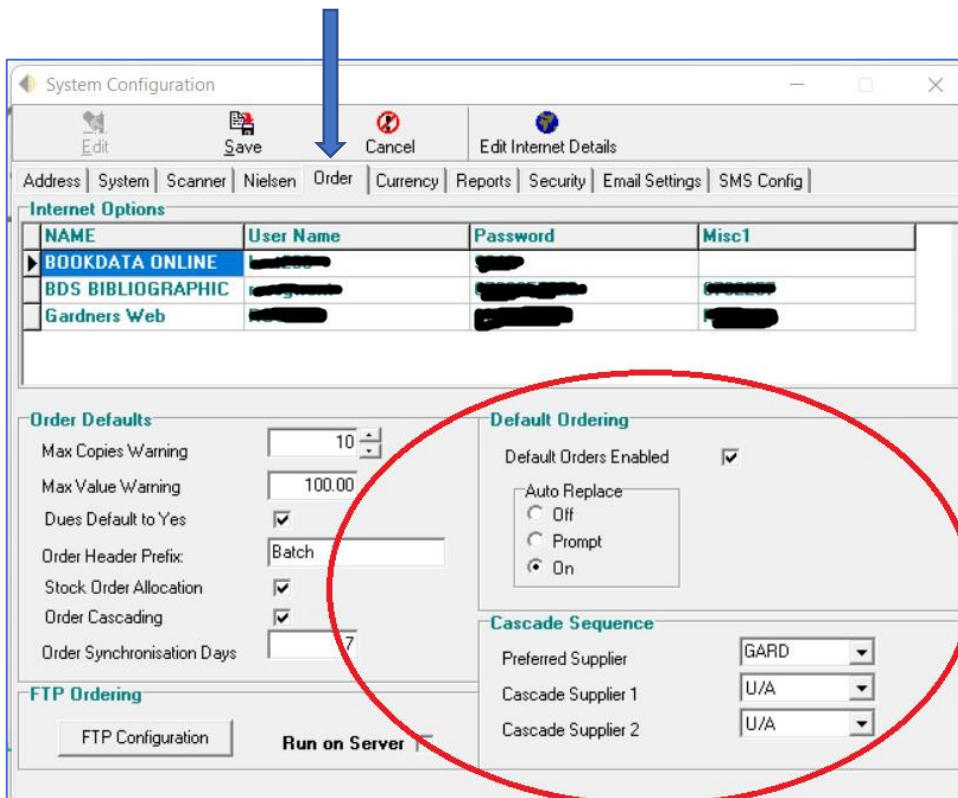
The 'Single Default Order' option is circled in red.

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.

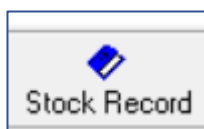
5. Stock History

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.

Date	Type	Qty. Change	Qty. Alter	Supp.	Customer	New Cost	Old Cost	Tran Ref	PO Ref	Invoice	RC	History Type	Description
29/11/2022 09:40	D	0	1	HACH				LS220409	69217			ORDERS	Deleted Order - Order Clean Up
09/04/2022 14:02	P	0	1	HACH				LS220409	69217			ORDERS	Order Placed With Supplier - Print
09/04/2022 14:01	D	0	1	HACH				LS220409	69217			ORDERS	Added To Order - ISBN List
25/06/2020 16:09	C	0	0	GARD				VIRAGO	59169			ORDERS	Cancelled - Order Header deleted
06/06/2020 13:26	P	0	0	GARD				VIRAGO	59169			ORDERS	Order Placed With Supplier - Print
06/06/2020 13:19	D	0	0	GARD				VIRAGO	59169			ORDERS	Added To Order - From Manual Order
06/06/2020 12:43	A		0								1	ADJUST	New Stock Record



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:

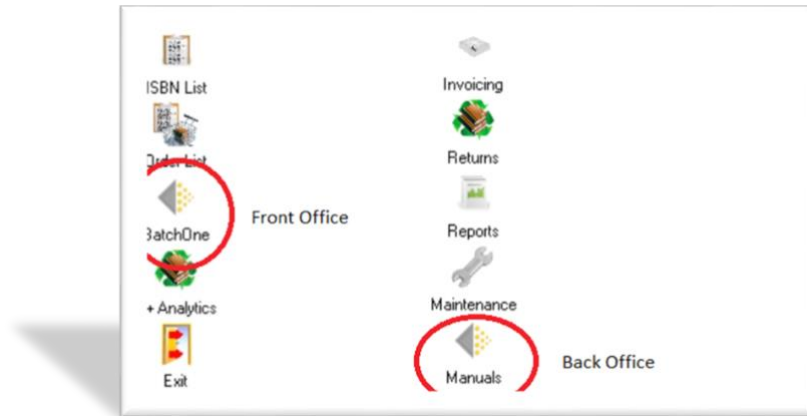
Stock Record					
New		Edit		Save	
Cancel		History		Loyalty Setup	
Stock Order	Customer Order	Sales History	History	Loyalty Setup	
Biblio	Orders	Awaiting Despatch	Allocations	Loans/Reservations	
EAN/ISBN13:	9781846077944	ISBN10:	184607794X	Stock No: 74070	

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:

<p>— Deliveries can be scanned and automatically checked against electronic copies of invoices.</p> <p>— Integration with Batch Payments makes sure you have the invoices before goods arrive.</p> <p>— Running in tandem with Batch Returns, returns can be sent and processed automatically.</p> <p>— Full stock control includes stocktaking, auto-categorisation, non-book stock options and more.</p> <p>— Reward customers with Gift and Loyalty cards.</p> <p>— Synchronise stock to e-commerce platforms with our low-cost web exporter.</p> <p>— Backed by the Booksellers Association, prices start at less than £10 a week with no onerous contracts.</p> <div data-bbox="480 1010 778 1193"> <p>BatchLine versions</p> <p>Latest version: Version 4.68 is perhaps the most significant one yet for booksellers, because it includes cost price plus a suite of cost and margin reports. Read the Release Notes here.</p> <p>⇒ Generic installation instructions for all updates</p> <p>To read about the features of each new version, download the release notes:</p> <ul style="list-style-type: none"> * BatchLine 4.22 (September 2020) * BatchLine 4.23 (October 2020) * BatchLine 4.24 (November 2020) </div>	<p>User guides</p> <p>General</p> <ul style="list-style-type: none"> * Find Batch Suppliers' GLNs here * Info for new bookshops <p>Stocktaking</p> <ul style="list-style-type: none"> * Hire a Koanatic 100 scanner * Download KTSync Software for your stocktake — Guide to installing and configuring the software * Stocktake instructions <p>Using Open Bravo and BatchLine</p> <ul style="list-style-type: none"> * Quick Guide - 1 Title Search and Ordering * Quick Guide - 2 Creating Returns * Quick Guide - 3 Direct Ordering * Quick Guide - 4 The Goods In Process * Quick Guide - 5 Web exporter (version 2) * Quick Guide - 6 National Book Tokens * Quick Guide - 7 Open Bravo * Quick Guide - 8 Loyalty and Gift Cards * Quick Guide - 9 Setting up standard till equipment * Quick Guide - 10 Auto-categorisation <p>Got a question? Check out the FAQs or watch the short instructional videos on our YouTube channel, which cover a range of topics. (Click on Playlist to see the videos available in the BatchLine and web exporter</p>
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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