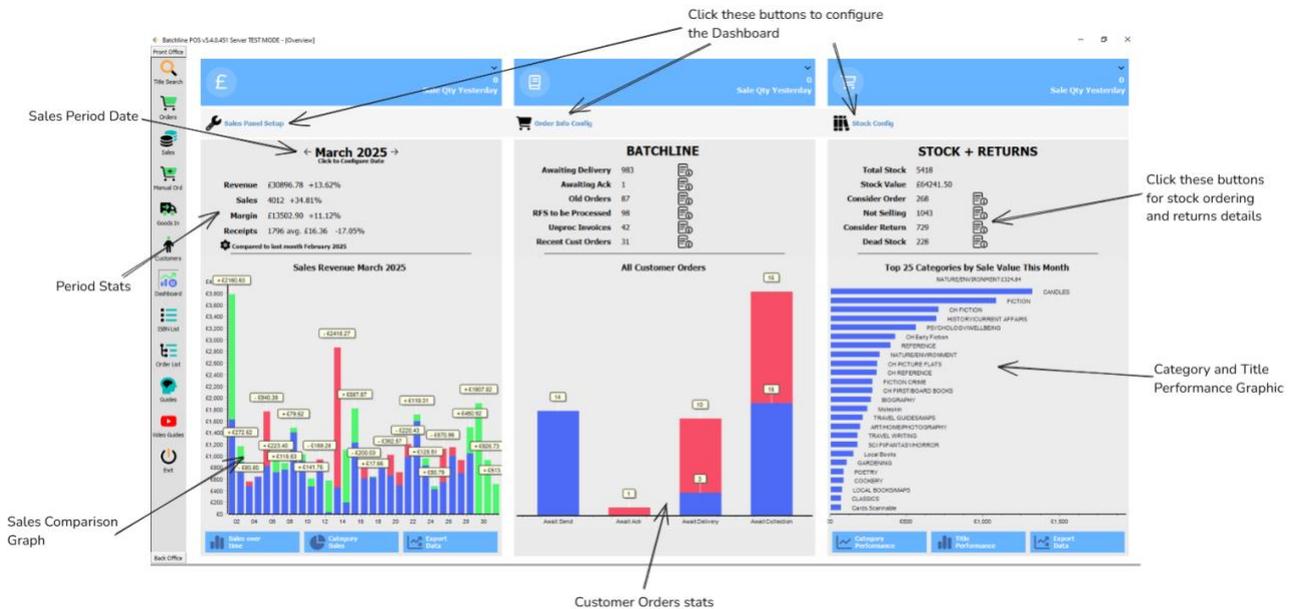
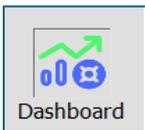


Introducing the BatchLine 5.4 Dashboard



How do I access the new Dashboard?

Once version 5.4 is installed on your machine, you will see a new button labelled 'Dashboard' on the left-hand side of BatchLine in the front office menu. Just click this button:



What does the new Dashboard do?

The Dashboard is designed to:

- Help you visualise sales and profits over time and compare time periods against each other.
- Allow you to see how categories and titles are performing.
- Help manage and stay on top of customer orders.
- Suggest possible titles to order if they are missing from stock or running out.
- Suggest possible returns for titles that are not selling.
- Allow you to export detailed data on sales and titles.

How can I learn how to use the Dashboard?

We have created a series of videos showing you how to use the Dashboard, which are available on the BatchLine YouTube channel: <https://www.youtube.com/@batchlineposstockmanagemen1854>

A lot of the Dashboard is very interactive so we encourage you to click on things (both right and left click) and play about with the menus that pop up. You shouldn't be able to break anything! If you need any help please email mail@batch.co.uk or call the switchboard number to speak to a technician or request support: +44 (0)203 832 2430.

What are some example tasks that the Dashboard can help me with?

- Try left clicking on different bits of the customer order graph to see what orders should be chased up. If you have clicked any of the bars in the 'Awaiting Collection' part of the graph you can click the 'Cust Collect' button to tell BatchLine that the order has been collected.
- Click on the 'Consider Return' detail button to get a list of titles per supplier that you can compile returns for – highlight titles with the enter key and then click 'compile return'.
- Click on the 'Consider Order' detail button and go down the list highlighting books with the return key or by double clicking them. When you've selected the books you want to order click 'Compile Order'.
- To get lists of bestsellers, click on 'Stock Config' and choose 'Title Performance' from the 'Stats Graph' drop down. Select the time period you are interested in with the 'Show Stats for' drop down. Click the tick icon to apply these settings. Once the stats have loaded right click on the graph to choose how many titles to see and whether to filter them by category. Left click on the graph to get a detailed view of these titles.
- To see what customers have been ordering recently, click on the 'Recent Cust Ords' detail button in the central BatchLine tab. You can define what 'recent' means by clicking 'Order Info Config' and changing the 'Recent Customer Orders are less than X days' config.
- To get acknowledgments for orders click 'Awaiting Ack' in the central BatchLine tab. From here you can click 'Get Ack' for a particular order or just click 'Get all Acks' to try to download all Acknowledgments for outstanding orders.
- To clean up old orders Click on 'Old Orders' in the central BatchLine tab and go down the list selecting old orders to delete with the return key. Click 'Cancel or Delete' and then choose either 'Order Arrived Delete' or 'Order Cancelled Delete' for each line that pops up.

What do I have to configure for the Dashboard to work correctly?

You don't *have* to configure anything. However, to get more accurate profit stats you should go to Back Office → Maintenance → System Config and put in default discounts for book and non-book products as shown below so BatchLine can make good estimates for profits on sales where a reasonable cost price for a product is not available.

The screenshot shows the 'System Configuration' window with the 'System Defaults' tab selected. The 'Default Discounts' section is visible, with the following settings:

Field	Value
Search Threshold	50
Default Search Database	BDS LIVE
Default Search View	Search List
Default Discounts - Book%	43
Default Discounts - Non Book%	50

The values 43 and 50 are circled in red in the original image.

You can also go into Back Office → Maintenance → Categories and mark categories as 'Set Not Returnable' if you don't want products in these categories to be included in suggested returns.

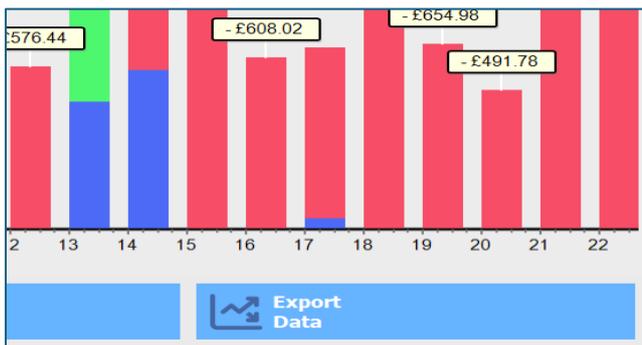
Shop Category Management							
Shop Category	Openbravo Category	In Stock	On Order	Stock Records	Subjects Mapped to Category	Not	
Undefined	Books	8	98	5768			
BIOGRAPHY	Books	131	27	4649 D,			
TRAVEL GUIDES/MAPS	Books	53	16	1685 1,			
HISTORY/CURRENT AFFAI	Books	274	51	6296 N,			
REFERENCE	Books	244	8	3638 G, 4,			
SPORT	Books	45	17	1309 S,			
POETRY	Books	61	8	1471 DC,			

What do the colours on the Dashboard mean?

In terms of sales, revenue or margin the colours mean either up, down or the same when compared to another period. In terms of orders, the colours denote age – green is new, blue is overdue and red is old.

How do I get data out of the Dashboard?

If you are looking at a grid of data on the Dashboard, you can right click and choose 'Make Excel Doc' to export the data to a spreadsheet. If you want as much data as possible click the 'Export Data' button at the bottom of the sales or stock and returns tabs to create spreadsheets of everything.



How do I access more information?

The best way to get more guidance is to follow the YouTube video guides.

- To learn how to visualise sales data, watch the 'Comparing Sales', 'Understanding Sales Periods' and 'Understanding Sale Data' videos.
- To understand how to use the central BatchLine tab, look up the 'Dashboard Order Management' and the 'Customer Orders' videos.
- To learn how to view and configure stock and category performance, choose the 'Configuring Stock and Returns' and 'Visualising Stock Performance' videos.
- To learn how BatchLine can help with returns and ordering suggestions watch the 'Working with Dashboard Returns' and 'Understanding Ordering Suggestions' videos.

See next page for **Further configuration options**: sales, BatchLine data (orders), stock and returns.



Select type of time period for sales stats

Configure Sales Panel

Time Period:

Compare:

Date Type:

Graphic:

Highlight change at: %

Select what you want to compare to

Select Sales Comparison or Category Sales Comparison

Select how you want to define what is a 'Normal', 'Overdue' and 'Old' order

Configure Batchline Data

Unsent Orders are
Overdue at days Old at days

Awaiting Ack Orders are
Overdue at days Old at days

Awaiting Delivery Orders are
Overdue at days Old at days

Awaiting Collection Orders are
Overdue at days Old at days

Ignore Invoices older than
 months

Recent Customer Orders are less than
 days old

Define what 'All Of Time' means for stock and category performance

Stock and Returns

Oldest Data of Interest years

Show Stats For

Stats Graph

Returns Window
Pub Date > Months Ago
Received no more than Months Ago
Include Core Stock In Returns

Not Selling
Never sold and had for at least months
Paperbacks that haven't sold in months
Hardbacks that haven't sold in months

Dead Stock
Cant return and not sold any for months

Running Out Soon
Predicted to Runout in less than days

Missing good titles
Sold over in the past months and none in Stock

What time period should the Dashboard show stats for?

Show Title or Category Performance?

What to include in possible returns

How to define what is "Not Selling"

Help Batchline suggest titles to order

www.batch.co.uk

For support contact: mail@batch.co.uk or call +44(0)203 832 2430