

booklog news

CAMEX Edition 2018

A Publication from ComputerWorks of Chicago, Inc.

Booklog Travels to CAMEX 2018

We look forward to seeing you at the Kay Bailey Hutchison Convention Center Dallas in Dallas, Texas, for CAMEX 2018. We will be in room D225 for the Booklog POS sessions and in booth #2317 for the trade show. We hope to see you there!

BOOKLOG POS SESSIONS

Room #D225

Thursday, March 1

1:00–2:00 p.m.

Reaching Your Customers Online

2:15–3:15 p.m.

Selling Outside Your Store

3:30–4:30 p.m.

What's New in Version 15.0

TRADE SHOW SCHEDULE

Booth #2317

Sunday, March 4

9:00 a.m.–5:00 p.m.

Monday, March 5

9:00 a.m.–5:00 p.m.

Tuesday, March 6

9:00 a.m.–2:00 p.m.

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.

In December 2016, 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, 2017. 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 soon I will have completed all of my 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 this opportunity to wish you and your entire staff a very prosperous 2018 and thank you for all of 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 college stores living in those states and territories impacted by hurricanes Harvey, Irma and Marie. We'll see you in Dallas!

— Jean Fishbeck, president



Training Tips

Prepaid Orders

Schools who sell graduation and nursing kits often have a prepaid option for those kits. Some stores even require prepayment with those items as some of them may not be returnable. If you would like to track prepaid orders in Booklog, it's simple. Our Special Orders Module allows you to take full and partial deposits on items you don't have available for sale yet. To create one, go to Sales > Special Orders, then use the Insert key or icon to add a new one. Enter the student's name, then the items that you want prepayment on. Enter the deposit amount in the deposit field, then process the order just like you would a sale. You can import the order into a retail purchase order. When you receive the item or items, you can send the customer an email to let them know it's available. When the customer comes to pick up their item, put their name in the register and Booklog will remind you that their item is available for pickup. Double-click on the item and it will pop into the sale. Process the sale and Booklog will remember to subtract the deposit they already paid on it.

Sorting Payment Types

One way to streamline the cashiering process is to arrange payment types in a useful order. Payment types are the tenders you take at the register after ringing up items and clicking the Process button. Most stores prefer to have their most commonly accepted tender (e.g., Financial Aid or Visa) at the top of the list, followed by their second-most used tender and so on. To sort your list, go to the Maintenance menu on the retail side of Booklog and click Payment Types and then the Sort button. You can sort tenders by clicking on one and dragging it to a new place in the list. You'll also see a number of tenders you don't use or need (e.g., Change, Jenzabar, Redeemed Mail Order Credit) but you don't have to do anything with them. They won't show up in your list. Once you're done sorting the list, click the Save button. Note: Any time you add a new payment type, the list re-sorts itself. Be sure to sort the list accordingly after adding a new payment type.

Customer's Corner

In this issue of Booklog News, we are pleased to feature Westmoreland County Community College, located in Youngwood, Pa. Westmoreland has been a Booklog customer since July 2005.

Westmoreland County Community College was founded in 1970 and began offering evening classes in the Jeannette High School in 1971. By the fall of 1972, the college established a permanent residence in a former Westinghouse plant in Youngwood, Pa., and expanded its offerings to include day classes.

Westmoreland's location on the suburban fringe was designed to attract students from both the Westmoreland County suburbs of Pittsburgh and the Monongahela Valley. The college has also extended its outreach to provide services to students from surrounding counties. Westmoreland's original Youngwood campus has now expanded to include four buildings, and the college has opened additional centers in Murrysville, Uniontown, Indiana, Latrobe, New Kensington and Smithton.

Westmoreland currently offers 64 associate degree programs, 13 diploma options, and 49 certificate programs to prepare students for careers or to transfer to baccalaureate degree programs at four-year institutions. The college also offers continuing education courses for adults, displaced workers, non-traditional students and college for kids. Throughout all this growth, Westmoreland has maintained the lowest tuition among all Pennsylvania colleges.

In recent years, Westmoreland has begun offering both online and distance education classes and degrees at the same cost as the onsite fees. These modes of learning allow students from any location to use state-of-the-art interactive web conferencing technologies (Blackboard Collaborate) and a course management system (Blackboard Learn) at convenient times and locations for the student. Westmoreland is ranked #1 in Pennsylvania for two-year online colleges.

Westmoreland offers intercollegiate sports for both men and women, and a range of intramural sports for its student body of approximately 4,000 students, all of whom are commuting students.

Located on the Youngwood campus in Founders Hall (the college's original building), the college bookstore provides textbooks, supplies, computers and other electronic devices, stationery, Westmoreland signature clothing, and a wide array of gift items for students,

faculty, staff and alumni. The store occupies 6,700 square feet of display and selling space that supports all of the college's face-to-face, online and web conferencing classes. The bookstore sells used books and also rents books for many of its classes.

Chad Seibel is the bookstore manager who is joined by five full-time, two part-time and several casual staff members. Chad began working at Westmoreland part time in 1982 and transitioned to full time 30 years ago — so most of the efficiencies and advances in technology at the store have been initiated under his leadership.

In addition to his role at the college store, Chad, a real golf enthusiast, teaches all of the non-credit golf courses at the college. His students include 13-year-olds and many retirees who are just looking for some hints on how to improve their golf game. Several years ago, Chad won a contest, which awarded him and a couple of his friends a trip to Myrtle Beach. Then in 2016, he went to the Masters Golf Tournament in Atlanta, which turned out to be "an unbelievable experience" and allowed him to cross off one of the items on his bucket list!

When Westmoreland decided to computerize its operations in 2005, Chad reviewed several point-of-sale/inventory management systems and decided that Booklog was the best fit for his store. All of us at Booklog have enjoyed working with Chad and his staff over the last 10+ years, and we look forward to continuing our relationship as we work to develop more cutting-edge technology.



Booklog's New Features

Version 15.0 will be our spring/summer release, and it has a significant number of new features and enhancements. There's not enough space here to list them all, so here are some of the highlights. We should have some additional significant changes by CAMEX, so absolutely stop by our training sessions and/or our booth, if you're attending!

ICBA REPORTING ENHANCEMENTS

We have a number of colleges with membership in the ICBA (Independent College Bookstore Association, www.icbainc.com), and we have moved to make it much easier to comply with their reporting requirements:

- **Sales Report Parameters:** Added new option for mail order source.
- **Booklist Report by Course:** Added totals at the end of the report.
- **Average Gross Sales Report:** Added option to show average transaction size by cat/dept.
- **Buyback Audit Reports:** Added option to run report by dates rather than by schedule.
- **Register Refunds Report:** Added option to filter by cat/dept.
- **EOP:** Separate MO taxable and non-taxable by mail order source.
- **New:** Rental Fees Collected report.
- **Electronic Journal:** Added Sales Module filter option.
- **Rental and Sales Report:** Added Sales Module filter option.

Rental Enhancements: Multiple Defaults by Term, New Lost Fee Option

Very significantly, we've added the ability to create separate (multiple) rental default parameters by term. This allows you to specify different pricing and due/grace periods/lost dates by term, and not affect parameters for concurrent terms. For example, if your graduate classes are in a term of their own, you may have different due dates from the undergraduate terms that may be running at the same time.

We've also added a much requested option for calculating the lost fee as the full price less rental fee plus late fee. In other words, the new lost fee option allows you to add a late fee charge to the lost book while discounting the price of the book the amount that you've already collected in rental fees.

Maintain Courses and Adoptions Enhancements

There are a couple of major enhancements to the MC&A window that are of note: First, we've added a prompt to notify the user that an adopted item is flagged as an old edition in the bluebook. Second, we've expanded the section notes to allow 100

characters. Third, we've added the ability to add choice group designations.

Choice Groups allow faculty and adoption managers to designate adoption items, e.g., "Choose 3 from Group A and 2 from Group B." You should be able to add as many items and groups to choice options, so shelf tags could, for example, show something like: Choose 1 from Group A, Choose 2 from Group B, and Choose 1 from Group C.

Choice Group options have also been added to Adoption Forms, if you are still printing out forms for your faculty and staff.

Buyback Enhancements

We've added some options to buyback for colleges that like to have more control over their buybacks, like those that run continuous buybacks or their own non-wholesale buys:

- **Buyback Hotkey:** Allow users to enter 290 items as hot key items.
- **Buyback Register:** Option to always ask if a 0.00 wholesale item should be returned to student.
- **Buyback Register:** Added process for changing customer midway through buy with possible rentals.

For the last option, the buyback register will prompt you to clear the transaction when changing the customer. The problem is that when items are added to a buyback transaction, multiple checks are made, not just regarding rental return eligibility, but whether items are bought new or used, etc. Rather than prompt the buyer all over on each item they've already scanned in, it makes more sense to rescan the items. The option to not clear the items is there in the event that not that many items were scanned in, and none would be rental returns when a customer is actually added to the transaction.

RedShelf Enhancements

You may now upload your booklist directly to RedShelf via FTP, and overnight, your customized catalog file will be ready to download, also via FTP. This new process is semi-automated within Booklog and automated on Redshelf's end, so once you add in your FTP credentials from RedShelf, you should be able to upload and download your lists/catalog at your leisure. The RedShelf catalog generation is automated on the backend so there shouldn't be catalog format mismatches.

We also have a new coordination process with RedShelf so you only need to load and adopt your catalog items from RedShelf once. Later, if you need to update your ebook pricing, you only need to select a new coordination-only option in the

Load and Coordinate Ebook Catalog window. The coordination process checks each book by print ISBN for the new price, and updates the UPC if the UPC has changed (and puts the old UPC in alternate SKUs); so you never have to re-adopt ebooks again after running coordination.

Both features are available in version 13.5 and 14.0, but are finally out of beta.

Miscellaneous CMM Enhancements

- **CMM Inventory Search:** Search by ISBN will search the print ISBN of (RedShelf catalog) ebooks, too.
- **CMM Inventory Search:** Allow users to assimilate items directly from search window.
- **Inventory Detail:** Double-click to open POs and Returns from Purchasing and Receiving and Returns tabs.
- **CMM PO by Item:** Added QOH, QOO, and OTB.
- **New Report:** Sales Tax Report by Date.
- **Label Printing:** Allow users to select a printer when printing labels in receiving, the search window, and item detail.
- **Coordinate Blue Book:** Imprint is added to list of items to choose to update.
- **Want List Detail:** Added toolbar option to update all rows as N/U/Either.
- **Global Inventory Changes:** Added pricing factor change.

RETAIL ENHANCEMENTS

User Defined Lists

We've had many requests from customers to add new category fields — but we've also had requests to add flags to items for things like seasonal merchandise. We're also aware that a lot of users don't use their categories for actual item categorization, but for other, unique situations. In response, we've created a way to add items to as many lists as you wish to create. So you may have a list of items that are specific to your Christmas season, your homecoming season, or your end-of-year season. Or you may wish to add items to a location list like a special, end-of-aisle promotional display. Lists can be added to promotions; items on lists can be searched by list in the inventory search; and you can report on Sales and Inventory reports by lists as well.

Inventory Item Alerts

Version 14.0 introduced the ability to add an alert whenever a specific customer is added to a transaction. Version 15.0 adds the ability to designate an inventory item

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See you in
Dallas!

What's New From Our Tech Staff

Manual Customer Merge

You can select two or more customer records and merge them into a single record. Unlike the Merge Customer by Customer ID feature, the Manage Customer Merge lets you pick which records to merge. You can use any criteria, not just customer ID. The manual merge also lets you pick which record's information and settings will remain in Booklog.

Booklog Has a Control and 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.

Special Orders

In the Cash Register screen a special order payment can be taken in addition to a sale. Use the ALT - F2 option.

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's New Features *(continued from page 3)*

alert in the cash register whenever the item is added to a transaction. These might be reminders about including items on special discounts, or checking that all the parts of an item are together.

Auto-refunded Items

Inventory items can now be designated as "auto-refund." When these items are scanned into a transaction, the refund box is automatically checked on these items. Use this designation for any item that you want to always have a negative price — for example, a custom store coupon.

Suspended Sale Enhancements/Options

We've added a new report for the items on suspended sales. We've also added the option to print the suspended sales shelf tag to the receipt printer from the regular cash register (previously touchscreen only), and the ability to print the report-layout from the touchscreen register (previously cash register only) by choosing the default suspended sale shelf tag receipt printer in the workstation properties. If you have a café in

your store and need a way to accept tips, you may also add a tip line, a tip-reminder message, and/or calculated tip suggestions to your suspended sale receipt layout so customers may add a tip BEFORE processing their credit/debit card.

Till Control Reconciliation

You may now run the till control reconciliation for any workstation from any workstation. When the Till Control Reconciliation wizard is opened, there is now a dialog box to choose which workstation you will be reconciling. The default will be the workstation you are working from.

Min/Max Quantity Discount Promotions Now Accumulate by Master SKU

Version 14.0 introduced the Min/Max Quantity Discount option to Promotions, but it is hampered by the limitation that items must have the same SKU/ISBN. We've changed the method by which we calculate the min/max quantity to use the master SKU instead. For example, if you have a min/max quantity discount on a

T-shirt item, you would only need to put the master item on the promotion, and all its sub-SKU items would count toward the promotion, like different sizes/colors with different SKUs, but the same item.

Security Enhancements

We've added a number of new restriction options, many to help you lock down cashier options in the cash register:

- Ability to add admin role/security level to non-admin users (this was introduced in version 14.0).
- Restrict store credit payment type.
- Restrict changing the Cat1 field in inventory detail.
- Restrict department sales in cash register.
- Restrict changing department field in cash register.
- Restrict selling into the negative.
- Restrict changing the sales tax in cash register.
- Restrict changing the customer discount in customer detail.
- Show the security description that is triggered on the Function/Security Override dialog.