

# HANDS ON WITH ANTHOLOGY

Your guide to Anthology

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## Welcome

Welcome to Anthology, the smart system for booksellers and other specialty retailers. This handbook will be your guide as you install and then explore your Anthology software. Anthology combines a wealth of features with an intuitive and easy to use interface. With Anthology you can:

- Have up-to-the-minute information about the state of your inventory at any moment.
- Sell books and other non-book items.
- Take, track, and fulfill Special Orders.
- Make mail order sales.
- Print bar code labels.
- Produce purchase orders that will get you the books you need at the best possible discounts.
- Generate reports on a wide variety of topics.
- Quickly search your inventory by ISBN, title, author, etc.
- Automatically generate returns in such a way as to keep your inventory lean and profitable.
- Move quickly and easily from one part of the software to another.
- And much, much more.

Also learn how you can use this training data to greatly decrease your startup time. After you work through this workbook, at the end of the lessons are instruction for you to follow that will easily allow you to use the standard setup you've been working with to launch your own store – saving you hours of set up time.

Are you ready to begin? Let's get started.

## Getting started

In order to start exploring Anthology, there are a few important steps you must take. We have tried to make these instructions as clear and simple as possible; however, if you have questions, please don't hesitate to contact Anthology at 800-819-0095 x104

### Install your training copy of Anthology

Anthology provides a self-extracting zip which contains all the information and installations you'll need to get started on your training. If you have not received file please contact us and we'll arrange for you to download it.

1. Open Windows Explorer navigate to the location of the HandsOnWithAnthology.zip. If you downloaded it will most likely be in your Downloads folder.
  2. Double click on the zip file to extract the necessary files. By default a folder called Anthology Training will be created in the current folder, the necessary files and folders will be extracted into that folder.
  3. Move to the Anthology Training folder then open the Anthology Installation folder.
  4. Locate the Install.exe and double click it. This will start the installation process and display a series dialog windows that will guide you through the process.
    - a. Choose Next to move off the Welcome screen.
    - b. You'll need to accept the License Agreement and then choose Next to move on.
    - c. Accept the suggested installation folder by clicking Next. This should be C:\Program Files (x86)\Anthology. If not you may change it now.
    - d. Choose Next to allow the installer to create a desktop icon for the Anthology Training program.
    - e. Click on Install to begin the installation process.
    - f. Choose Finish to complete.
- To try using your Anthology program, simply double click on the Anthology Training icon on your desktop.
  -

### Set up Fetch

One of Anthology's most powerful features is the Fetch functionality which allows you to access information about books in print from within Anthology. Currently Anthology supports four internet-based books in print services: Content Café from Baker & Taylor, BooksInPrint.com from Bowker, content@ingram from Ingram, and Anthology's own Simple Fetch.

The Anthology software you have just installed ships with test credentials for BooksInPrint.com, content@ingram, and Simple Fetch. You can select the database you want to test with by taking the following steps:

1. Launch Anthology by double-clicking on the Training Copy icon on your Windows desktop. Once Anthology is launched, select the Tools | Options menu option from the main menu in Anthology.
2. Select the External Data tab.
3. In the drop down list labeled External Inventory Source, select BooksInPrint.com, content@ingram, or Simple Fetch.




You must have an active internet connection to use one of these external data sources.

We'll come back to Fetch a little later to see how you can use it to increase your productivity.

## Set up your printers

If you have a printer available you may want to take a moment to configure it to work with your training system.

1. In Anthology, go to Master Files | Stations and click on the Details tab. On this page you can set up the printers to be used for printing cash register receipts and for printing reports, purchase orders and other documents.
2. Click the ellipsis button  at the end of each of the Receipt Printer and Report Printer fields and select a local printer. In a real store setting, you would probably use a special receipt printer for the cash register receipts and a laser printer for reports. For now, you can use any printer to which you have access.

With these tasks out of the way, let's take a look at Anthology.

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## Using the Cash Register

### Overview

For many booksellers, the Cash Register function will be one of the most important in the Anthology system. The Anthology Cash Register is powerful and yet easy to use. It supports a wide variety of tender types including credit and debit cards, gift cards, and even user-definable tenders. With Tax Profiles and Customer Discounts, Anthology's Cash Register can handle even the most demanding tax and discounting situations.

There are a wide range of special functions available to you when using the Cash Register. For example:

- You can optionally identify your customer at any point during the sale, capturing information about their purchase history and preferences
- You can take or sell special orders, sell gift certificates, or accept returned merchandise.
- Problem sales may be temporarily suspended allowing you to continue selling while the issue is resolved. You can easily come back to the suspended sale at any time to complete it.

In addition, there are many special receipt options available to handle a variety of selling situations.

- Multiple register receipts can be printed for a single sale.
- Gift Receipts for holidays and special occasions can be used to suppress pricing information.
- You may choose to send your Accounts Receivable sales to your report printer in the form of an invoice.

And much more.

Before we begin, let's take a look at Cash Register, so that you can be familiar with the basic layout of the screen. To open the Cash Register, select the Sales menu, and then Cash Register.



The screenshot shows the 'Cash Register - Sale # 101946 (Scan Mode)' window. The interface is divided into several sections:

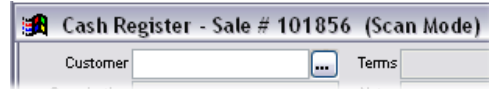
- Header Section:** Contains fields for Customer, Organization, FBC total (0), Discount (No discount), FBC bal (0.00), and Tax Profile (Resident).
- Current Line Section:** Located on the left, it includes fields for Title / Desc, ISBN / SKU (highlighted in red), Qty (0), UOM, Sale price (0.00), Disc % (0.000), and a Taxable checkbox.
- Tape Section:** A table on the right side with columns: Type, ISBN / SKU, Qty, Price, Tax, Disc %, and Ext.
- Totals Section:** Located at the bottom right, showing Tax (0.00), SubTotal (0.00), and Total (0.00).
- Button Bar:** At the bottom, it contains function keys: F1 Help, F2 Lookup, F3 Take Tenders, F4 Sell Gift Certifict, F5 Take SPO, F6 Charge Shipping, F7 Delete Line, F8 Accept Return, F9 Cancel Sale, F10 Open Drawer, F11 Suspend Sale, and F12 Resume Sale.

- At the top of the screen is the Header Section. This contains fields for Customer, Organization, Discounts and Tax Profiles, as well as other information pertaining to the current sale.
- On the right side of the screen is the Tape Section. This provides a list of the items contained in the current sales transaction.
- Located below the Header Section, on the left of the screen, is the Current Line section. This is where the work of the Cash Register is done. The fields in this section allow you to identify the items you are selling, as well as optionally to edit pricing and sale quantities, and to apply discounts.
- Below the Tape Section and on the right side of the screen is where the sale totals are recorded – showing Tax, Sub-total, and Total.
- The Button Bar at the bottom of the screen provides easy access to some of the more common functions within Anthology.
- The ellipsis buttons located to the right of the ISBN/SKU and Customer fields are used to launch their respective Assistant screens, making lookups quick and easy.

Now that we have a general idea of where things are on the Cash Register, let's put it to work.

## Making a simple sale

If the Cash Register screen is not already open, please open it by selecting the Sales menu, followed by Cash Register. Our Cash Register should be set in Scan Mode by default. This can be quickly verified by looking at the title bar for the Cash Register window – you should see the words (Scan Mode) in the display next to the Sale #. If this is not the case please select the Actions | Scan Mode On/Off menu option to turn it on.



Typically, sales are made through the Anthology Cash Register using a barcode scanner. When training with Anthology, you probably do not have one of these devices connected to your computer. However, we can easily simulate the scanner's behavior. Scanners not only read the barcode, they also send a carriage return to the program. When you play the part of the scanner, you will enter the item number (read the barcode) and then press the **Enter** key (send the carriage return).

To make a sample sale, please take the following steps:

1. If the Cash Register screen not already open, please select the Sales | Cash Register menu option from the main menu. The cursor will be blinking in the ISBN/SKU field, waiting for you to enter a SKU.
2. In the ISBN/SKU field enter 0618152539 and press the **Enter** key. You should now see the book *Curious George in the Big City* has been added to the Tape Section with the quantity of 1.


If your computer is equipped with speakers, you probably heard a “click” sound when the last item was entered. This audible feedback helps your clerks know when things are going as they should; in the same way, a warning sound lets them know when there is a problem. You can change these sounds or turn them off altogether; see the section on customizing the Cash Register at the end of this chapter.

Please also note that although this title has a 13-digit ISBN associated with it in the Inventory file, we were able to identify it with its ISBN-10 equivalent. Anthology knows all about ISBN-10s and ISBN-13s and converts freely between them.

## Selling non-book items

Anthology handles non-book items as well as books. We can sell a copy of our local paper, the Meteor-Gazette, by taking the following steps:

1. In the ISBN/SKU field, enter NEWS.
2. Press **Enter**.

 You can also print labels through Anthology for merchandise that does not come with its own barcode. Sticker the merchandise directly, or keep a sheet of frequently-scanned items handy at the point of

Your Bookstore

Meteor-Gazette (daily) **\$1.00**  
NEWS



sale.

For applications like an in-store café or newsstand, the optional Anthology Touchscreen Cash Register makes it easy to enter frequently-sold items.

Cash Register - Sale # 101870 (Scan Mode)

Customer:  Discount: No discount Tax Profile: Resident

ISBN / SKU \*  Enter line

Type	ISBN / SKU	Qty	Price	Tax	Disc %	Ext
Sale	SAND_CHIK Chicken Sandwich	1	6.00	✓	0.000	6.00
Sale	TEA_CHAI Chai Tea	1	3.50	✓	0.000	3.50
Sale	TEA_GRN Green Tea	1	3.50	✓	0.000	3.50
Sale	BISCOTTI_CH Chocolate Biscotti	1	3.50	✓	0.000	3.50

SubTotal: 16.50 Tax: 0.99 Total: **17.49**

For more information on the Touchscreen Cash Register, please contact Anthology Sales.

### Taking tenders and completing a sale

Let's wrap up this sale. To do so, please take the following steps:

1. Press F3, or click the F3 Take Tenders button at the bottom of the Cash Register screen.
2. The left side of the Cash Register screen changes to display the tender list. Double click the tender Cash to select it.



You can also select a tender by navigating to it with the arrow key and pressing the **Space** bar, or simply typing the number shown before each tender.

Keyboard shortcuts like these are used throughout Anthology for rapid data entry.

3. Since few customers pay with exact change let's enter a different amount. Type \$10.00 in the Amount Tendered field and press enter to accept it.
4. Notice that the Change Due is shown in the lower left.
5. A message screen appears confirming the action you are about to take. Click the Complete button or simply press enter.



Note that one of your options here is the Edit the sale. You can always edit a sale in Anthology, adding or removing line items, changing the tender, etc., right up until the moment the sale is completed.

The receipt will print. It should look something like this, depending on your printer:

## Your Bookstore

100 Anystreet  
PO Box 1  
Anytown, MI 12345  
(000) 555-1212

---

Transaction #:00101991

Original station:Station One, 1 Clerk:  
Original receipt printed: 6/8/2014 5:49:13 PM  
Reprint station:Station One, 1 Clerk:STEVE  
Receipt reprinted: 6/8/2014 5:50:33 PM

---

SALES:

1@ 7.95 0618152539	7.95
Curious George in the Big City	
1@ 1.00 NEWS	1.00
Meteor-Gazette (daily)	

SUBTOTAL	8.95
----------	------

TAX:

Sales tax	0.54
-----------	------

TOTAL TAX	0.54
-----------	------

GRAND TOTAL	9.49
-------------	------

TENDER:

Cash	10.00
------	-------

TOTAL TENDER	10.00
--------------	-------

CASH CHANGE	\$0.51
-------------	--------

*Thank you*



00101991



If you get an error message when trying to print the receipt you might need to make sure you've configured your printers correctly. Please refer to the Printer Setup section above.

- After the receipt prints and the sale is completed, a small message box will display in the upper right corner saying, "Press any key to continue". Anthology holds the last sale on

the screen to give the clerk a chance to view the Change Due field. Once the change is given you can simply press the spacebar to ready the Cash Register for the next sale.

### Summary: Making a simple sale

In this section, we saw how to make a simple sale in the Anthology Cash Register, and how items can be entered by scanning their ISBN or by typing in their Title/Description. We also saw how Anthology can handle non-book items as well as books.

### Tender options: The example of InHouse gift cards

At the conclusion of our last sale, we accepted cash as tender for the merchandise sold. Anthology lets you accept a wide variety of tenders, including checks, credit cards, debit cards, and gift cards—both the Booksense cards from the American Booksellers Association and in-house gift cards that are exclusive to your store. In addition, you can accept multiple tenders in any combination.

As an example, let's focus on InHouse gift cards. If your system is equipped with the optional InHouse Gift Card module, you can have gift cards printed with your store's name and logo. You can sell gift cards and redeem them, and also use them to issue store credits on returns and other similar transactions.

Let's demonstrate the use of InHouse gift cards by creating a new sale:

1. If the Cash Register screen not already open, please select the Sales | Cash Register menu option from the main menu. The cursor will be blinking in the ISBN/SKU field, waiting for you to enter a SKU.
2. In the ISBN/SKU field type in 006029003X and press **Enter**. As you recall, this is what a scanner would do. You should see the book 'Daddy's Little Boy' in the Tape area with the Qty of 1. The cursor is positioned in the ISBN/SKU field ready for the next entry.
3. Let's suppose this sale contains only this item. To begin taking tenders we can press the **F3** key or click on the F3 Take Tenders button at the bottom of the screen. But the easiest way to take tenders is simply to press **Enter** when the cursor is blinking in the empty ISBN/SKU field. The program will surmise that you want to take tenders and give you the opportunity to do so.

Using the mouse and the menus is convenient and easy, especially for beginners. But when you want to go fast, as at the Cash Register, nothing beats using the keyboard. For this reason, Anthology has keyboard shortcuts throughout to enable you to perform even complex tasks with just a few keystrokes.

We should now have the Take Tenders screen open. Let's suppose that our customer has an InHouse gift card that they want to use. To accept this tender, take the following steps:

1. Looking at the list of usable tenders on the left side of the screen, you will see InHouse gift card as the third option. We can select this tender by clicking in the box to its left with the mouse; by moving the highlight down with the **Down** arrow key and pressing **Enter**; or (easiest) by pressing **3**.

2. A text entry box labeled Card Number will open, waiting for you to specify the number of the gift card to be used. InHouse gift cards can be printed with bar codes that can be read by the Cash Register scanner; with magnetic stripes that can be read by the credit card swiper, and with a human-readable number. For now, let's just type in 12345 and press **Enter**.
3. This particular card has an outstanding balance of \$7.50. Since the total amount of the sale is \$15.89, the gift card cannot cover the whole amount due. Anthology applies the amount available on the card to the transaction (you can see a Tender line has been added to the Tape area on the right to reflect this). Then the program focus is returned to the list of tenders at the upper left so that you can select another tender. Let's choose to pay the balance with cash. To do so, press **1**.
4. The focus moves to the Amount Tendered field. The Total Due at this point is 8.39 (as shown in large red figures immediately above the Amount Tendered field). Probably in this situation the customer would give us a ten dollar bill, so enter 10.00 and press **Enter**.



To enter a whole dollar amount like this one, you don't need to type the decimal. Simply enter a 1 followed by three zeroes.

5. Choose Complete to complete the Sale.

As you can see, Anthology allows you to use more than one tender on a sale. In fact, you can have as many tenders as you like on a transaction.



You can also set rules for what



Allow change

Cash change limit

1.00

kinds of change are allowed for each tender. For example, you can specify a change amount above which store credits are given.

To see how useful and flexible house gift cards can be, let's see how they can be used to minimize cash out on returns:

1. If the Cash Register screen not already open, please select the Sales | Cash Register menu option from the main menu. The cursor will be blinking in the ISBN/SKU field, waiting for you to enter a SKU.
2. Suppose our customer wants to return an item. Click on the button labeled F8 Accept Return at the bottom of the screen. Notice how the button color changes to highlight the fact that the next item scanned will be treated as a return.
3. In the ISBN/SKU field, type in 1888889519 and press **Enter**. Note that the Total Due shown at the bottom right of the screen is a negative number.
4. Click on F3 Take Tenders. The Take Tenders screen opens.
5. Let's choose to issue our refund in the form of an InHouse gift card. To do so, press **3**.

6. At this point you will be asked if you want to activate a new card or increment an existing one. We might choose the second option if the customer already had a card; for now let's assume they don't. Choose the Activate option.
7. The Activate Gift Card window will appear. At this point, you would pull a card from your stock of unused gift cards and scan, swipe, or hand-enter its number in the Card Number field. Let's enter 9999 and press **Enter** to move to the Amount field. Since the amount to be returned to the customer has been pre-filled for you, simply press Enter again to move to the F12 Process button, and once more to accept the values entered.
8. The Complete/Edit/Cancel dialog will appear, allowing you to complete the sale and print a receipt. You then give the card to the customer to be used on a future occasion at your store.

Gift cards are popular with both customers and retailers. For customers, they offer an attractive and convenient way to store credits. For the retailer, they minimize cash refunds and, with the Anthology InHouse gift card, ensure that the customer will return to your store to use the card. And in contrast to other gift card alternatives, the Anthology InHouse cards do not carry transaction fees of any kind apart from the cost of the cards themselves.

## Other Cash Register features

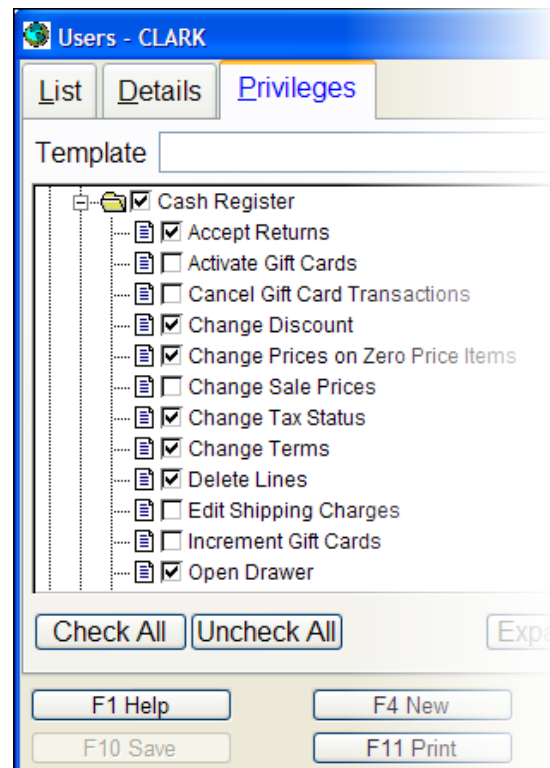
### Staying secure at the Cash Register

Especially at larger stores, managers may want to control which employees are able to perform which kinds of operations at the Cash Register and elsewhere. For convenience's sake, we have turned off the security settings in this copy of Anthology, but the program gives managers a powerful set of tools to control who can do what at the cash register and elsewhere.

The Users screen allows you to assign privileges to system users, optionally using templates to define shared sets of privileges for common roles like sales clerk.

### Receipt printing options

Anthology gives you options when it comes to printing receipts at the Cash Register. You can print a gift receipt like this one by selecting Gift Receipt from Actions menu at any time during the sale:



# Your Bookstore

100 Anystreet  
PO Box 1  
Anytown, MI 12345-1234  
(000) 555-1212

Transaction #:00101923  
Station:tem, 14 Clerk:STEVE  
Sunday, March 8 2009 1:14 PM

SALES:  
1 9747315661  
Woven Mystery : Old Tibetan Rugs

*Thank you*

Gift Receipt -- Save for Exchanges



00101923

The barcode printed at the bottom of the receipt makes it easy for your clerk to pull this transaction if an exchange is made. This ensures that you don't issue a full-price refund for an item purchased at a discount!

### Attaching a note to a sale

It can be handy sometimes to associate a note with a sale—for example, when taking special orders. Selecting Attach a Note from the Actions menu lets you attach a comment which you can optionally print on the receipt and which is permanently associated with the sale:

The screenshot shows a software interface for a sale. At the top, there are fields for 'Customer' (Brown, Sue) and 'Organization'. To the right, there are labels for 'FBC total \$' and 'FBC bal'. Below these is a table with columns 'Type', 'ISBN / SKU', and 'Qty'. The table contains one entry: 'SPO', '6305982651', and '1'. Below the table, there is a field for 'Title / Desc' and an 'ISBN' field. An 'Attach Note' dialog box is open in the foreground, displaying the text: 'This is a gift for her husband...don't call the house when it comes in!'.



## Sales on account

Anthology allows you to accept sales on account for those customers to whom you want to grant this privilege. If you have added the QuickBooks Accounting Links for Accounts Receivables, information about sales on account can be exported to your QuickBooks® software or to an Excel® spreadsheet. This allows you to track and age your customer accounts without the hassle of entering the data a second time.

If you choose, you can print the receipts for account sales in a full-page invoice format on your report printer.

In addition the Sales History Report gives you the option to filter on Account Sales, allowing you to see only those sales where Account Sale was used as a tender.

**A/R sales summary**  
For period beginning 2/5/2003 thru 2/28/2003  
Totals By Customer Name, Title/Descript

SKU	Description	Units	Retail \$	OH	00
0064472299	Extra Innings	1	5.99	9	0
0060291613	Meow : Cat Stories From Around The World	1	20.01	9	0
0023150602	Personal Financial Planning : Your Guide To A	1	21.95	-1	0
	Totals for Customer Name: <b>Adams Larry</b>	3	47.95		
1563708558	200 Best Jobs For College Graduates	1	16.95	9	0
	Totals for Customer Name: <b>Maule Tom</b>	1	16.95		
<b>Total books sold:</b>		4	64.90		

## Suspending and resuming sales

Sometimes it can be useful to put a sale on hold. You may have experienced a customer realizing they have forgotten their checkbook in the car after you have just finished ringing in their purchases. In this situation you wouldn't want to cancel the sale and you surely don't want the other customers in line to wait while the first customer retrieves their checkbook. Anthology allows you to temporarily suspend sales and come back to them at a later time.

Let's take a quick run through the process and see how it all works.

1. Enter SKU # 0060094737 for the book *Claws*.
2. Press enter to accept the default quantity of one (1).
3. Press F11 function key to suspend this sale. A message asking, "Do you want to suspend this sale?" appears. Choose Yes. This sale is removed from the Cash Register screen and you are ready to begin another sale. For this example we will not start a new sale at this time.
4. Press F12 function key to resume a sale.
5. The Resume Suspended Sale screen appears.



You may suspend more than one sale at a time. When you resume a sale you will be shown a list of the suspended sales to choose from.

6. Select the sale you're interested in from the list and press F12 or click the Select button.

7. The selected sale is now in the Cash Register ready to continue.
8. Go ahead and complete the sale.

### Accepting returns

It's a regrettable necessity. Sometimes customers will bring an item back for exchange or refund. You have to deal with it. Anthology makes the process as painless and accurate as it can be.

One thing you never want to do is to accept a return at full-price of an item that was sold at a discount or marked down. Even when the customer has the original receipt for the purchase, it's all too easy to miss. (And though you will always read the receipt carefully, will your employees?)

Let's see how the Anthology Returns Manager helps.

1. If you don't have it open already, open the Cash Register.
2. Click on the Actions menu and select Returns Manager.

If the customer has their cash register receipt, there will be a barcode printed at the bottom.

SALES:	
1@ 7.95 0618152539	7.95
Curious George in the Big City	
1@ 1.00 NEWS	1.00
Meteor-Gazette (daily)	
SUBTOTAL	<u>8.95</u>
TAX:	
Sales tax	<u>0.54</u>
TOTAL TAX	0.54
GRAND TOTAL	9.49
TENDER:	
Cash	<u>10.00</u>
TOTAL TENDER	10.00
CASH CHANGE	<u>\$0.51</u>

*Thank you*




00101991

Scanning the barcode will bring up the original transaction. Simulate the scan by taking the following steps:


1. In the Transaction Number field located at the bottom left of the Returns Manager window, enter the transaction number: 101991
2. Click on the Set button at the right of the screen.

Transaction 101991 will appear in the Returns Manager window. Reading across, we can see the item (or items) on the sale, the customer name, and the discount that was given, if any.

 If there had been a discount associated with the original sale, that discount would be automatically applied to the return as well.

3. Select this sale by pressing the **F12** key or clicking on the F12 Select button at the bottom of the screen.

We are returned to the Cash Register screen, with the selected return ready for entry.

 The F8 Accept Return button at the bottom of the buttons, providing a visual cue about the action that is about to be performed

Sometimes you may want to allow a return from a trusted customer who does not have their sales receipt. The Returns Manager also allows you search for past sales by customer or by ISBN/SKU.

### Giving discounts at the Cash Register

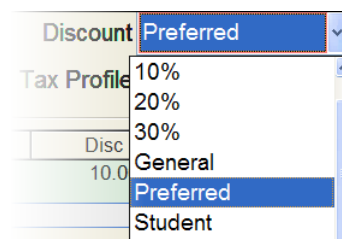
Anthology gives you powerful tools to manage a variety of discounts at the Cash Register. You can apply discounts to a whole transaction or to individual line items. In addition, you can set up permanent or temporary discounts for individual Inventory items, or for Departments or Sections of merchandise.

To see how discounts work, please take the following steps:


1. Open the Cash Register from the Sales menu if it is not already open.
2. If you have a sale in progress, please cancel it using F9 Cancel Sale.
3. Enter 0671042742 and press Enter.

The book *The Honourable Schoolboy* should be added to the tape. Notice that there is no discount associated with the line as yet.

4. Click on the down arrow button next to the Discount field in the upper right of the screen. A list of discount schedules will drop down.
5. Choose Preferred.




When you do, the Preferred discount (10%) will be applied to the line you already entered.

 You can specify a discount schedule at any point in the transaction—at the beginning or any point thereafter.

- Let's add another book to the transaction. To do so, key in *0060254920*. Notice that the new item receives the 10% discount that was specified in the header.

Often, a particular discount will be associated with a customer. Anthology automatically assigned the discount when the customer is specified. To see this:

- Click on the Lookup button  located to the right of the Customer field. When the Customer Assistant screen appears, type in JEAN in the Search field at the bottom of the screen and press **Enter**.
- The Assistant will find and select the customer Amanda Jean. Notice in the header area of the Customer Assistant screen that Amanda is entitled to the Student discount. Students are entitled to a 15% in this example.
- Press **F12** to select the customer Amanda Jean.


Disc Sched Student

- When you do, you will be returned to the Cash Register screen. Notice that now the discount schedule for the transaction has changed to Student, and 15% has been assigned to both line items.

On occasion, you may want to assign discounts at the line item level. Perhaps you want to give a discount on an ad hoc basis for a single item, or perhaps you want to exclude an item from being discounted. To see how this is done:

- Use your mouse to click on the line for *Where the Wild Things Are* in the "tape" area on the right of the Cash Register screen.
- Notice that this line gets a blue highlight and notice also that it has become available for editing in the data entry area to the left. Click once in the Disc % field in the data entry area on the left of the screen.

Sale price \* 17.95  
Disc % 0.000

- Type **0** and press **Enter**.
- The line will be entered with a 0.00% discount on the tape area, and a small lock icon  will appear next to the discount to show that it has been locked in at the line level—that is, that any discount assigned to the transaction as a whole will not affect this line.

Anthology gives you other tools to manage discounts as well. You can specify that a given Inventory item never be discounted, or a discount which it will always receive. You can even put a whole category of merchandise (a Department or Section) on sale for a specific time. Discounts applied and taken can be tracked in a variety of reports and are reflected in calculations of margins, profit, and other sales metrics.

Sales Discount

Start date 3/10/2009 ...

End date 3/17/2009 ...

Discount Schedule

10%

## Dealing with sales tax

What's that they say about death and taxes? Anthology can't make you immortal, but it can make dealing with collecting and reporting sales tax a little easier.

Anthology can support an unlimited number of local, state, national and other taxes.

Departments	Included
Audio Books	<input checked="" type="checkbox"/>
Book	<input checked="" type="checkbox"/>
Cafe	<input checked="" type="checkbox"/>
Calendar	<input checked="" type="checkbox"/>
Map	<input checked="" type="checkbox"/>
Music/Recordings	<input checked="" type="checkbox"/>

Departments of merchandise can be defined in terms of their taxability or non-taxability, and persons or institutions that enjoy special tax statuses can easily be handled by using Anthology's tax profiles.

Of course, Anthology can help with your tax reporting as well, since all information about every aspect of your sales is saved until you decide you don't need it any more.

## Customizing the Cash Register

The Anthology Cash Register, like the rest of the program, is highly customizable. To see some of the options available, open the Options screen on the Tools menu. As you can see, there are dozens of Cash Register behaviors that you can control and modify,

including:

- The message that prints on sales receipts
- Whether invoices for account sales are printed to the receipt printer or to a report printer
- Whether to track customer sales history
- Default deposits and other options for handling special orders
- Elements of the Cash Register screen to show or to hide.

You can also control not only which tender types you accept, but rules for the kinds of change allowed for each type.

To view the Tenders management screen, please take the following steps:

- Click on the Master Files

Allow change      Cash change limit   
 Bankable       Pop drawer  
 Ztape detail  
 Give store credit above cash change limit  
 Accept on web

menu and select Tenders.

2. Click on the record for GIFTC (Gift Certificate).
3. Click on the Details tab.

You can see that when a gift certificate is used for payment on a sale, if the face value of the gift certificate is less than one dollar more than the sale total, the program will suggest returning change in cash. It will suggest using a store credit or house gift card for amounts above one dollar in change.

Specifying rules in this way reduces confusions and mistakes at the Cash Register.

## Building relationships with your customers

For independent booksellers, it's all about building community. When customers feel that they are known and appreciated, they will come back again and again. Anthology offers a number of ways to help you build loyalty among your customers. In this section, we will explore some of these ways.

### Frequent buyer clubs

For many retailers, the keystone of their customer relationship marketing is their Frequent Buyers Club (“loyalty program”). By giving rewards to your best customers, you encourage them to return again and again to your store, and you give them an incentive to identify themselves to you at the time of the sale. In Anthology you can have multiple clubs, with rules that you define yourself. You can count items sold, dollars spent, or number of sales. You can give rewards either in the form of dollar premiums or discounts. And you can either print coupons or let the program keep track of and apply rewards at the time of sale.

The Frequent Buyer Club that is set up in the program, customers will get a reward of a \$10 premium once they spent \$100 dollars in the store. The program is set to “remember” such rewards and to apply them automatically on the next eligible sale. To see how this all works, let's make a sale to a customer participating in this Frequent Buyer Club.


1. If the Cash Register screen not already open, please select the Sales | Cash Register menu option from the main menu. The cursor will be blinking in the ISBN/SKU field, waiting for you to enter a SKU.
2. To reach the Customer field at the top of the screen, either click in the field with the mouse or press **Shift-Tab** twice.

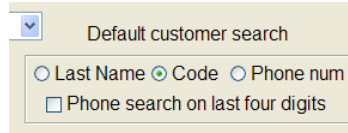


If most of your sales begin with identifying a customer, you can set the Cash Register to begin each new sale with the cursor waiting in the Customer field instead of ISBN/SKU. Please note that you can identify your customer at any point

during the sale—not just at the outset.

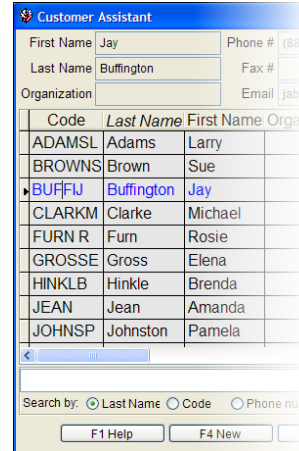
- Let’s suppose the current customer is Jay Buffington. To select him as the current customer for the sale, simply type all or part of his last name in the Customer field and press **Enter**.

 Anthology gives you several ways to identify customers. If you have customer cards printed with serialized numbers, you can simply scan the code; or you can use the customer’s phone number (full 7-digit number or the last 4 digits only) as an identifier. Although you can configure Anthology to make one or the other of these methods the default method of searching, you can always fall back to one of the others for hard-to-locate customers.



- The Customer Assistant screen pops up. The record for Jay Buffington is ready for selection, as indicated by the tick mark in the leftmost column next to his name. As you can see, all the methods mentioned above are available at the bottom of the window. In this case, however, the program was able to successfully locate the customer based on what we typed in the Customer the Cash Register screen, and we can select Jay by pressing the F12 key or clicking on F12 Select with mouse. The focus will return to the main Cash Register screen, ready to accept an ISBN or SKU in ISBN/SKU field.

The record search




Code	Last Name	First Name	Organ
ADAMSL	Adams	Larry	
BROWNS	Brown	Sue	
• BUFFJ	Buffington	Jay	
CLARKM	Clarke	Michael	
FURN R	Furn	Rosie	
GROSSE	Gross	Elena	
HINKLB	Hinkle	Brenda	
JEAN	Jean	Amanda	
JOHNSP	Johnston	Pamela	

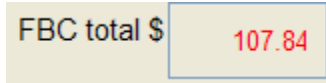
field of the the the screen have

We can see in the FBC Total field in the upper part of the that Jay’s current total is 83.89. Since he does not currently any reward on file, his FBC Balance is zero. Now let’s sell him another book.


- Key in 0307264238 and press **Enter**.

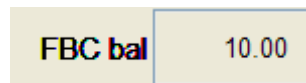
 If your computer is equipped with speakers, you may hear a “ta-da!” when this line is entered. This reward sound a good way to let your customer (and other customers in the store) about the rewards earned in your program. You can customize the sound that plays (or specify no sound at all) on the Options screen.

- When the line has been added, the FBC Total value on the top of the screen will change to reflect the new total Jay will reach at the completion of the sale; and the number turns red so that you can give Jay the good news that he has passed the \$100 threshold set for this club and will be entitled to \$10 off on his next sale.



If we complete this sale, the program will remember that Jay is now entitled to a reward, and the next time he shops that reward will be automatically applied to his total.

 The next time we make a sale to Jay, the FBC Balance



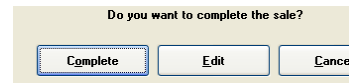
field in the header will show the reward in store for Jay.

To complete the sale, take the following steps. Or, if you prefer, you can simply press the **Esc** key to cancel the sale.

7. Click on the F3 Take Tenders button at the bottom of the screen, or just press the **F3** key.
8. Let's accept a check as payment. To do so, you can click in the box next to the CHECK tender type; or just type **2**, as indicated to the left of the tender name. Press **Enter** or click on the Enter Line button.



9. Choose to complete the sale, and wait for the receipt if you have a printer set up.



receipt

### Viewing customer sales history information

Knowing what your customers have purchased in the past is good for you and good for them. Customers may want advice on what to purchase next; or a good customer may want to return an item but have lost their sales receipt. Let's see how Anthology can help.

1. If you are following on directly from the previous exercise, you should still have Jay Buffington identified as the current customer. If not, please open the Cash Register from the Sales menu. Click with your mouse in the Customer field, and type in BUFF. Press **Enter**. When the Customer Assistant opens, press **F12** to choose Jay Buffington. The focus will return to the ISBN/SKU field on the main Cash Register screen.
2. To find out about Jay's sales history, please click on the Actions menu. Locate Customer Sale History near the bottom of the menu.




Every screen in Anthology has its own Actions menu, providing you with easy access to the many actions and features of that screen. Please note that when a hotkey combination is associated with a given function, Anthology shows that hotkey combination on the Actions menu to help you learn these time-savers.

3. Choose Customer Sales History, either by selecting it from the Actions menu or by pressing **Alt-F11**. The Customer Sales History screen will open, showing you a list of all of Jay's purchases.


Source	Tran #	ISBN / SKU	Title / Description	Qty	UOM	Date	Price	Disc%
CO	0000004-1	0316666343	Lovely Bones	1	EA	4/5/2008	21.95	0.000
CR	101671	0007133073	Rossllyn : Guardians Of The Secrets	1	EA	12/5/2007	15.95	0.000
CR	101684	0631232761	Learning By Design : Building Sust	1	EA	1/4/2008	55.01	0.000
CR	101788	0374199698	Middlesex	1	EA	9/4/2007	20.01	0.000
CR	101801	6306696091	My Sacrifice	1	EA	8/4/2007	9.98	0.000
CR	101801	6306864504	Human Clay	1	EA	8/4/2007	28.98	0.000
CR	101857	6305672822	Best of Beethoven	1	EA	1/10/2009	6.98	10.000
CR	101857	6306776931	Reggae Mix	1	EA	1/10/2009	12.98	10.000



 Like all such “grid” displays in Anthology, you can easily rearrange this one to help you find what you are looking for. For example, clicking once on the Date column heading will sort the display by date, while clicking on Title/Description will sort on that column.

<u>Date</u>	
8/4/2007	
8/4/2007	
9/4/2007	
12/5/2007	
1/4/2008	Sales

Suppose that Jay wants to return a copy of *Most Wanted Man* that he recently bought, but does not have a receipt. Since Jay is a good customer, we would like to accommodate him. Viewing the Customer History display we can see that he did recently buy the book.


 You may need to scroll down in the list to find *Most Wanted Man*.

Note also that when he did, it was at a 20% discount. To accept this return, please take the following steps:

1. Use your mouse to put the cursor on the line for *Most Wanted Man*.
2. Choose F12 Accept for Return. You will be returned to the Cash Register screen, with *Most Wanted Man* showing in the data entry area to the left.
3. Press **Enter** or click on the Enter button to add this line to the transaction.

The book will be added to the Tape area at the right. Note that the line Type is Return, and that the extension for the line is a negative value. Most important, notice that the correct discount was carried over from the original transaction:

Type	ISBN / SKU	Qty	Price	Tax	Disc %	Ext
Retur...	1416594884	1	28.00	✓	20.000	-22.40
	<i>Most Wanted Man</i>					


 Please note that different types of lines can all be handled in a single Anthology Cash Register transaction, which can contain lines for sales, return, and special orders—no need to do a separate transaction for each.

You can complete this sale using the F3 Take Tenders option as shown above, or you can cancel it by pressing **Esc**.

## Customer relationship marketing

The information you capture at the point of sale can help you communicate better with your customers about sales, book signings, and other store events.

Let’s take a look at the Customer Relationship Marketing Tools (“CRMT”), on the Reports menu. To open the screen, take the following steps:

 You don’t have to close the Cash Register screen in order to open another screen in Anthology. You can have multiple screens open at the same time on your Anthology desktop, and you can resize and arrange those screens for your maximum convenience.

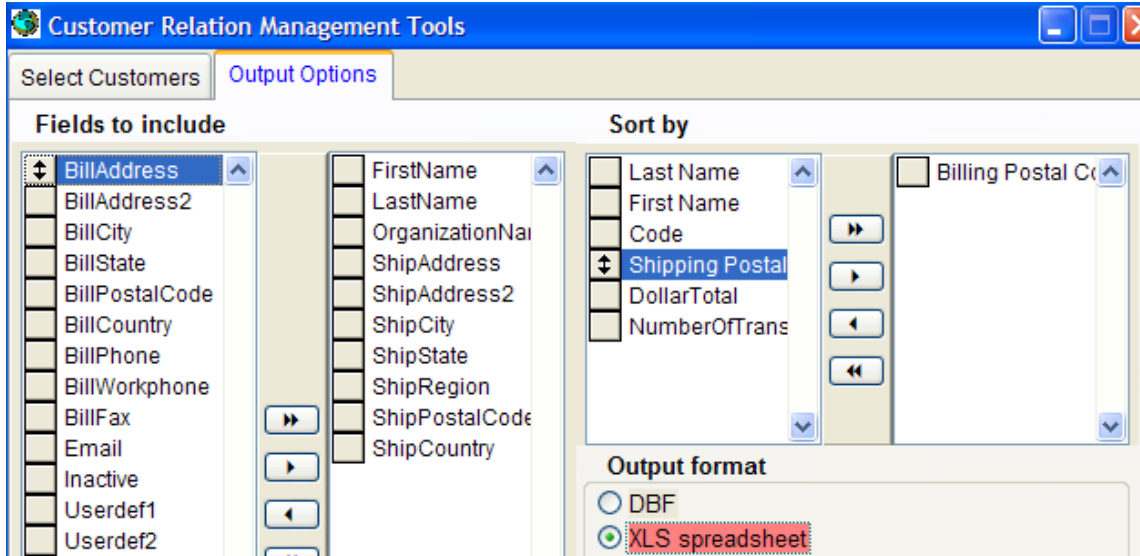
1. Click on Reports on the Anthology main menu at the top of the screen.

- Note the wide variety of reports available to you in Anthology. Many of these reports are highly customizable; and you can create your own custom reports using the powerful Query screens associated with the Inventory, Custom, and Vendors screens.
- For now, please choose Customer Relationship Marketing Tool, located fourth from the bottom of the Reports menu.

The CRMT screen allows you to select groups of customers based on their sales history, geographical locations, and other criteria, including User Defined Fields (UDF) which you can define for your own special needs. Below you can see a selection of all customers who have purchased a J.K. Rowling book during the last two years being prepared. You could also prepare a list based on a particular title or Section (shelving category):

The screenshot shows the 'Customer Relation Management Tools' window. It has two tabs: 'Select Customers' (active) and 'Output Options'. Under 'Select Customers', there are several filter categories: 'Sales Areas', 'Postal Codes', 'Customer Types', 'New / Lost Customers', 'UDF 1', 'UDF 2', and 'UDF 3'. A 'Mailing list only' checkbox is present. The 'Sales:' section shows a date range from '01/01/2012' to '1/1/2014' and a 'More Than' checkbox with a value of '\$10'. Below this, a note states: 'If no dates are specified then all customers will be included, subject to other conditions'. There are two main sections: 'Authors' and 'Titles'. Under 'Authors', a list of names is shown, with 'Rowling, J. K./ Grandpre,' selected. Under 'Titles', 'Rowling, J. K.' is listed. A note at the bottom of the sections area states: 'If no Authors are selected, all customers will be included. If one or more Authors are selected, then only customers who have purchased books by those Authors will be selected.' At the bottom of the window, there is a 'Save settings' checkbox.

Once you have defined the group of customers you want to communicate with, you can print mailing labels or prepare an export file to provide to a popular email marketing program like Constant Contact®:



There are many ways in which Anthology lets you use the information it collects to better serve your customers and promote your store. For more ideas, you can visit the Customer Zone at [www.anthology.com](http://www.anthology.com), or discuss these and other ideas with your fellow booksellers at the Anthology Message Board.

You can take some time now to explore the Customer Relationship Marketing Tools screen if you choose. When you're done, please close the screen by clicking on the X in the upper right hand corner of the screen.



## Summary

We've only just scratched the surface of the Anthology Cash Register. Among other functions, the Cash Register lets you:

- Take and sell special orders (covered below)
- Apply sophisticated discount and tax scenarios
- Print multiple receipts or gift receipts, and print receipts from earlier transactions
- Sell gift certificates
- Charge for shipping
- And much more

Feel free to explore these and other functions found on the Cash Register Actions menu. For more information on them, consult the Help system (available from the Help menu), or contact Anthology Sales (at 800-819-0095 x103; [sales@anthology.com](mailto:sales@anthology.com)) with specific questions.

## Using the power of the Internet: The example of special orders

### Overview

There's no doubt that the internet is changing the way booksellers do business. On the supply side, it provides a wealth of information about books, vendors, and stock availability. On the customer service and sales side, it greatly increases your ability to stay in touch with customers. More than that, email and other tools help you to build communities of readers and customers centered on your store.

In this section, we will illustrate some of the ways in which Anthology lets you leverage the power of the internet by showing you how Anthology helps you manage the crucial business of taking, managing, and filling special orders for your customers.

### Introduction to Fetch

Before we dive into SPOs, let's take a look at one of Anthology's richest and more powerful features: Fetch. Please take the following steps:

1. Open the Cash Register screen from the Sales menu if it is not already open.
2. In the ISBN/SKU, let's enter the ISBN of a book that is not in the Inventory file of the sample store of the copy you are working with, 0393312445, and press **Enter**



Remember, entering an ISBN in this way is just like scanning the book's barcode.

You could have entered this book using an ISBN-13 as well -- Anthology understands and converts freely between the two formats

After a moment a dialog will appear: "ISBN found in external inventory, add to your inventory?"

Let's take a moment to stop and understand what has happened here. When you entered the ISBN 0393312445, Anthology searched the Inventory file of the sample "Your Bookstore" data that comes with the training copy of Anthology.



Your Inventory file is the authoritative list of all the items that you stock or have stocked in your store.

When 0393312445 was not found in the Inventory file, Anthology switched over to search the specified external database of books in print. (Please see the section on Set Up Fetch on p. 2 above for more information on databases of books in print.)

3. Choose Yes by pressing **Enter**.

When you do, the Fetch screen will open. The Fetch screen gives you a chance to review and, if necessary, to edit the record you are about to enter into your Inventory.

Let's stop and take a look at the Fetch screen a little more closely:

The Fetch screen is the gateway through which information from your external database enters your system. Although it is possible to set Anthology up so that books which have been found in the external database are entered directly and automatically into the Anthology Inventory file, most users prefer to have a chance to review and edit this data first.

This is, among other reasons, because the categories of the external database may not correspond exactly to the categories you use. For example, the Ingram content@ingram database we are now using (assuming you have not changed over to Bowker or Simple Fetch) provides a Subject category of "Fiction | Historical | General" for this title. (You can see the values that come from the external database along the bottom of the Fetch screen).

Most stores will not have a separate shelving category for General Historical Fiction. In smaller stores, there may only a single category of Fiction. The Fetch screen allows you to make adjustments of this kind, keeping your data clean, consistent, and useful.

In the case at hand, you can see that Anthology has already pre-selected "Fiction" in the Section1 field in the center of the Fetch screen. It was able to do this by using an Anthology-

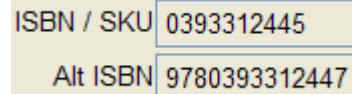
exclusive technology called Learning. Just as the name implies, when you assign the Anthology Section label of "Fiction" to a book whose external,

native Ingram Subject value is "Fiction | Historical | General ", Anthology learns and remembers that association. The next time you import a book with that Subject value (as in the present case), Anthology is able to suggest the appropriate Anthology Section label so that you do not have to enter it again. The same holds true, as you can see, for Publisher, Department, and Media/Binding.

Another tool for rapid, accurate data entry is provided by the lock icons that you see next to a number of fields on the Fetch screen. When you are doing sustained data entry of new inventory, certain settings will typically carry over from item to item. Clicking on a lock icon (go ahead and try one now) "locks" that setting so that it will reappear on all new records until you unlock it. Just one more way Anthology makes data entry easy.

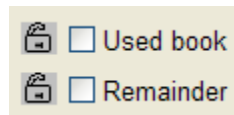
A few other fields and features:

- Anthology supports both the ISBN-10 format which is still common on most books in print as well as the ISBN-13 that will eventually replace it. You can decide which form to make primary, either for individual books or for your inventory as a whole. Try clicking on the "Make ISBN-13 primary" checkbox in the center of the screen to switch back and forth between the two forms.



ISBN / SKU 0393312445  
Alt ISBN 9780393312447

- If you are importing a book whose Publisher is not already in your database of vendors, simply check the "Add Publisher" checkbox immediately above the Publisher field. Anthology will create a record for the publisher in the Vendor file automatically.
- Anthology handles non-book items as well as books. The Item/UPC field allows you specify a UPC barcode number or manufacturer's part number for such items.
- Retail, List, and Web prices can all be specified.
- Web prices are adjusted according to criteria you specify on the Options screen.



- Anthology allows you to categorize items as used books or remainders, to distinguish them from new copies you may own. For more information on specialized functionality for used and remainders booksellers, see below.

Fetch is a feature that is available to you throughout Anthology. Any place you can enter an ISBN, you can Fetch. As you'll see below, Fetch simplifies and enhances the process of taking special orders or creating purchase orders, receiving books and a host of other important tasks.

Now that we've reviewed the Fetch screen, let's add this item to our inventory:

4. Select **F12 Save** .

You will be returned to the Cash Register screen. You can go on to complete the sale as described above or cancel it by pressing **Esc**.

## Taking a special order: Finding books and checking availability with Web Resources, Fetch and Internet StockCheck

Special orders are important tool for building a strong customer base for independent bookstores. It's important that your customers know they can get any book from you, and quickly. And special order customers tend to be good customers, who come back again and again.

But special orders have traditionally been difficult for booksellers. They involve tracking detailed information not only about the books ordered and the customers ordering them, but also stock availability, order status, deposits, etc.

In this section, we'll show you how Anthology can make the process of dealing with special orders easier, with special emphasis on the internet tools and resources that Anthology gives you access to. To see how easy it can be, please take the following steps:


1. If you don't have the Cash Register open, please open it now from the Sales menu. The cursor should be blinking on the ISBN/SKU field.

Your good customer, Donna Milton, greets you at the register. She has been searching the shelves of your fiction section for Patrick O'Brian's novel *Post Captain*.

Your instinct is that you don't stock this title, but you want to make sure whether the title is perhaps simply out of stock but on order. To do so, let's use the Inventory Assistant:


2. Choose the F2 Lookup button at the bottom of the screen, either by clicking the button with the mouse or by pressing the F2 function on the top of the keyboard.

The Inventory Assistant opens a sortable, searchable list of all the items in your Inventory. The easiest way to look for a book like this is via the Quick search.

 The Inventory Assistant provides you with several ways to search your Inventory. In addition to the Quick search, you can search by Title, Keyword, Author, or Reverse ISBN. The last search lets you enter the last few characters of the ISBN to do a quick lookup.

The cursor should be blinking in the coral-highlighted field at the bottom of the screen, and as you can see Quick has already been selected for you as the default search.

3. Please enter "POST CAPTAIN" and press Enter.

 You don't need to enter all the words in the title for a Quick or a keyword search, and the words need not be in any special order. However, the more words you enter the narrower and more accurate your search result will be.

A dialog appears, showing us that the item was never part of our inventory and offering us the options to add it now on the fly, cancel the search, or to search again.

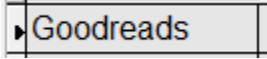
We would like to quickly and easily find out if the book is in print, and if so, how quickly we can get it for our customer. To do so, let's use Web Resources, one of the most powerful new features in Anthology v8.

4. Choose Search Again, either by clicking on the button or by entering the letter S.

Back at the Inventory Assistant screen, we should still have "POST CAPTAIN" in the search text box.

5. Click on the F5 Web button at the right, or simply press the F5 key.

Anthology supports several different Web Resources, including Goodreads and, if you have one of these sites, IndieCommerce or Anthology Webstore. In this demonstration data we have enabled both Goodreads and IndieCommerce, and so we are given a choice here of which resource we want to search. Let's try Goodreads.

6. If it is not already selected (as indicated by the tick its left in the list), click on the line for Goodreads and F12.  mark to press

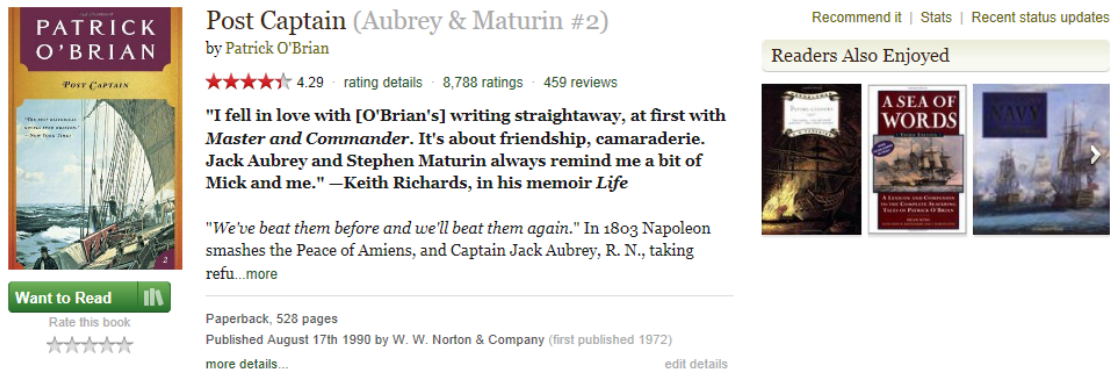
A browser window opens on a list of books in Goodreads, with *Post Captain* listed at the top. This looks like a good possibility.

7. Hover your mouse over the title *Post Captain (Aubrey/Maturin, #2)*.

An underline will appear, indicating that this is a link to another page (in this case, the detail page for this listing.)

8. Click on the title link.

We are taken to a detailed page for *Post Captain*, with a cover image and a brief description of its content. If you have a monitor that swivles or are working on a tablet, you can show your customer the cover art for the book. (Hover your mouse over the cover art in this display to get a larger image.)



**Post Captain (Aubrey & Maturin #2)**  
by Patrick O'Brian

★★★★☆ 4.29 · rating details · 8,788 ratings · 459 reviews

"I fell in love with [O'Brian's] writing straightaway, at first with *Master and Commander*. It's about friendship, camaraderie. Jack Aubrey and Stephen Maturin always remind me a bit of Mick and me." —Keith Richards, in his memoir *Life*

"We've beat them before and we'll beat them again." In 1803 Napoleon smashes the Peace of Amiens, and Captain Jack Aubrey, R. N., taking refu...more

Paperback, 528 pages  
Published August 17th 1990 by W. W. Norton & Company (first published 1972)  
more details... [edit details](#)


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Readers Also Enjoyed

Let's go ahead and bring it into our Anthology system for purposes of creating a special order. To do so, click on the Fetch icon at the top of the browser window.

The Fetch screen will now appear, allowing us to edit the bibliographic information that will be added to our database.



 If you would like to try this same exercise with an IndieCommerce site (example provided courtesy of The Book Table of Oak Park, IL), simply press Esc here to return to the Inventory Assistant. Choose F5 Web again, but this time select IndieCommerce from the list of Web Resources. To learn more about Web Resources, please view our YouTube video at [tinyurl.com/lql2r6t](http://tinyurl.com/lql2r6t).

Since Anthology's Learning technology has already suggested appropriate Sections, Publisher information and so on, we don't need to make any edits on the Fetch screen.

9. Instead, choose the F3 Send to SPO button at the bottom of the window.



You will be returned to the Cash Register screen, with *Post Captain* shown in the "tape" area at the right of the screen.

Note that the line Type (leftmost column in the Tape) is "SPO". You could add other line types, including sales, to the same transaction. The Ext column should show 7.98.


SPO	0393307069 Post Captain	1	15.95 ✓	0.000	7.98
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This test data is set up to collect 50% of the retail cost of the book (in this case \$15.95) as a deposit for special orders. You can configure the program to charge 100%, nothing, or anything in between as the default amount for the deposit. (You can also edit the deposit charged on any individual transaction.)

**Special Order**

Default deposit

Last SPO #

 The PrePay option on the Actions menu will calculate the total amount of the special order including taxes if any, so that customers can pre-pay the total amount of the purchase when placing the special order.


At pickup, any deposit collected is automatically applied to the Total Due on the sale.

- To wrap up the transaction, choose F3 Take Tenders.

When you do, you will be reminded that a customer must be specified on a Special Order.

- Press **Enter** to choose OK.

The Customer Assistant will open, allowing you to choose a customer (or add a new one, if necessary). We can locate our customer by searching on last name, on customer code, or by phone number.

 You can specify in the Options screen which default search will be pre-selected when you open the screen will be, but all the searches are always available to you.

**Default customer search**

Last Name  Code  Phone num

Phone search on last four digits

In this case, we are pre-selected to search by last name.

- Type the first few letters of our customer's last name--say 'MIL' and press **Enter**.

The record for Donna Milton will appear selected in the grid area above.

LYNCHL	Lynchburg	Laura		(888) 555-1212	545 Si
▶ MILTOD	Milton	Donna	Long Road High School	(888) 555-1212	105 H
NEVINT	Nevinson	Tom	Saginaw Harbor Yacht Club	(888) 555-1212	710 Si
PATTEM	Patterson	Meg		(888) 555-1212	27 Co
RUSHTJ	Rushtorn	John		(888) 555-1212	21543

Search by:  Last Name  Code  Phone num  Phone search on last four digits

Notice that if Donna provides us with updated information about her phone, email or other data, we could edit her record by choosing **F6 Edit**. Or if it turned out that Donna was not yet in our system we could add her by using **F4 New**.

2. Since this is the customer we want to identify, choose F12 Select.
3. When asked to confirm that you want to take tenders, press **Enter**.
4. Let's take a check in payment. Either use your mouse to check the box to left of the CHECK tender, or simply press **2** on the numeric keypad.

When you do, the amount of the Total Due will be pre-filled in the Amount Tendered field.

5. Since the customer is writing her check for the exact amount, we can press **Enter** to accept.
6. Choose Complete to conclude the sale.

As you can see, Anthology gives you the tools to give your customers superior service on special orders. You can:

- a. Using either Simple Fetch or a subscription to a database of books in print, quickly and easily find out whether or not a given title is in print.
- b. With Internet StockCheck, quickly find out in real-time the availability of titles you are interested in at major distributors or, for publishers participating in Instant Response, at the publisher's.
- c. Create a special order for the book, associating it with an existing or new customer
- d. Add the book to your inventory, making sure when you do that its bibliographic data will be useful in the future.

## Tracking and managing special orders

Tracking and managing your special orders is essential. In this section, you'll see how Anthology's CBO Manager screen allows you to get full information on the status of all your special orders--new SPOs, those on order with vendors, and even those which are already complete.



“CBO” stands for customer back orders, which include not only special orders but also books ordered but not yet shipped through the Customer Orders screen that manages mail, telephone, and web orders.

Along the way, you’ll see how Anthology helps you to stay in touch with your customers.

To explore the CBO Manager, please take the following steps:

1. Close the Cash Register or any other Anthology screens you may have open, and then go to the Sales menu and choose CBO Manager.

The grid in the center of the CBO Manager screen shows all the items that match the checkboxes selected immediately below. The top and bottom of the screen show detailed information about the currently selected item.


You can see the special order for Donna Milton we took earlier at the bottom of the list.

Source	Item Status	Date	CustCode	Customer	Phone	ISBN/SKU	Title/Descrip
▶ SPO	Draft	1/4/2014	JOHNSP	Johnston, Pamela	(888) 555-1212	0345449746	Fall from Grace
SPO	In	1/4/2014	GROSSE	Gross, Elena	(888) 555-1212	1885173598	Deadly Kin
SPO	OnOrder	12/25/2013	VANCED	Vance, Diane	(888) 555-1212	037540516X	Random House Chinese to E
SPO	New	6/8/2014	MILTOD	Milton, Donna	(888) 555-1212	0393307069	Post Captain

If the focus is not already on the line (indicated by triangular "tick" mark in the leftmost column) click on the line with Donna Milton's name to put it there.

The Item Status of 'New' for Donna's book tells us that it has not yet been ordered. Let's fix that right now.

The toolbar at the top of the screen, immediately below the main menu, has buttons for a number of commonly used functions like opening the Cash Register or Inventory screens, printing, or querying Internet StockCheck.

Two buttons to the right of the Internet StockCheck button is a button with two right-pointing  arrows. If you "hover" your mouse over the button (that is, put the mouse pointer there without yet clicking), you'll see a label appear: "Send to PO".


2. Click on the Send to PO button.

The Pick PO window will appear, with all the current Draft (that is, unsent) POs listed. At the top is listed the PO Corral, a special place to hold suggestions and other items whose ultimate disposition you haven't decided yet.

In this case, however, we want to get this title ordered as quickly as possible for our customer. For most booksellers, the best way to do that is to place it on the next order to their distributor.

Remember, our Internet StockCheck query on this item showed us who has the item in stock at this time.

Let's suppose that we order from Baker & Taylor as a regular practice.

 It's a good practice to keep a draft order for your main distributor available to hold special orders and other books you need quickly. Of course, that distributor could be Ingram, Partners, or any other distributor you do business with.


3. Click with the mouse to put the highlight on Baker & Taylor and choose F12 Select.

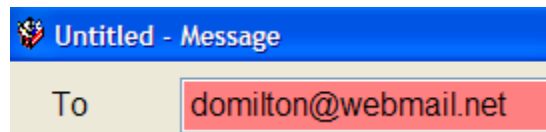
You will be returned to the CBO Manager screen, but now the Item Status of Donna's order is Draft, showing us that the item is on a Draft PO waiting to be sent out.


▶ SPO	Draft	6/8/2014	MILTOD	Milton, Donna	(888) 555-1212	0393307069	Post Captain
-------	-------	----------	--------	---------------	----------------	------------	--------------

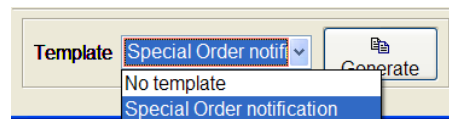
Once the PO is actually sent, the Item Status will change again to On Order, and when it is received it will be On Hand. In this way, you can always see at a glance the current status of all your special orders.

Looking over in the grid (or at the screen header, where the same information is available), we can see the PO number, vendor, and (once it has been posted) date.

At the top of the screen, in the toolbar, you may notice a button with a green envelope.  . When the email icon lights up in green in this way, it means that an email address is on file for this customer you can send them email directly from the CBO Manager from or from other screens where it will be useful to do so. You can use either Microsoft Outlook (but not Outlook Express) or an SMTP email provider like Gmail.



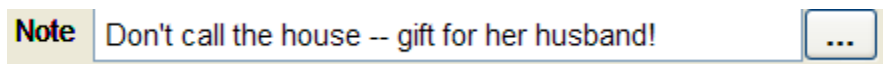
 You can select from a number of pre-defined templates or even define your own templates for the emails you send in different situations.



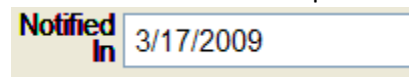
Notes can be attached to special orders (or, indeed, to any sale); and these notes can be seen on the CBO Manager screen. To see an example of a note:

1. Click on the special order for Elena Gross, a few lines above Donna Milton's.

You'll see a note in the header area at the top of the screen:



You can also see in the Notified In field in the header when Elena was notified that her special order has arrived. (Please note: the date in your copy of the data may differ):



You can, if you like, experiment some more with the CBO Manager screen. Sort by different columns by clicking on their headings; experiment with different filtering options available with the checkboxes below the grid; or send some more items to POs.

When you are done exploring the CBO Manager screen, press **Esc** to close it, or click on the X in its upper right corner.

## Summary

In this chapter, you've seen how Anthology helps you with the important task of dealing with special orders. Along the way, we showed you some powerful and unique tools that Anthology provides to help you:

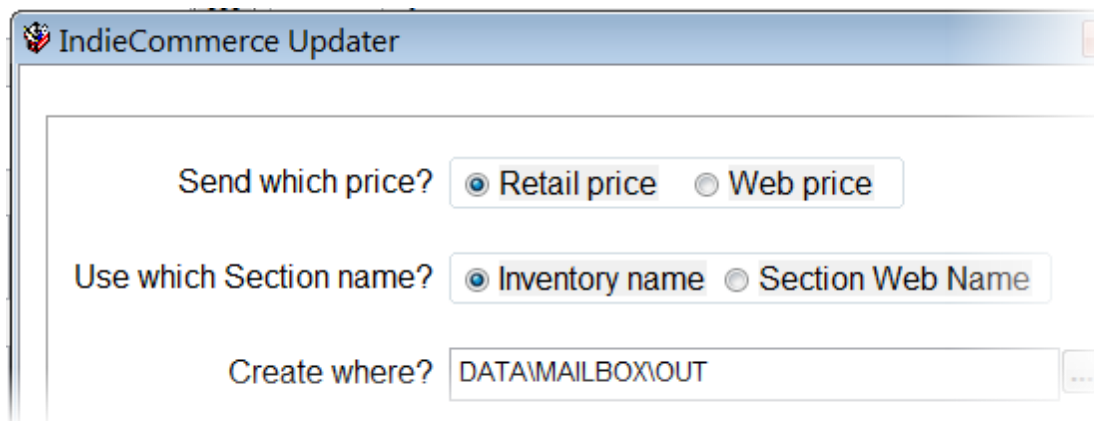
- Quickly and transparently add new inventory items to your Inventory through Fetch
- Instantly get real-time information on stock availability, order and back order status from a range of vendors
- Communicate quickly and easily with your customers via email

## More ways to sell

Successful booksellers have discovered that they need to reach outside the four walls of their bricks and mortar stores to find new markets. Anthology provides powerful tools for letting you make sales outside the box. Here are a few:

### Web sales

Anthology provides robust support for the IndieCommerce sites from the American Booksellers Association, as well as other third-party sites.



### Book fairs

Schools, churches, conventions and other venues can provide lucrative opportunities for booksellers to bring their inventory to new markets. The Book Fair function in Anthology (Sales

menu) allows you to create lists of books to be taken offsite. When these lists are checked out, Anthology keeps track of what inventory is out at which venue.

The sample data set included with your Anthology program includes several book fairs in different stages of the process.

To take a look at Book Fairs, take the following steps:

1. Go to the Sales menu and select Book Fairs. The screen will open to the List page, showing you a list of all book fairs currently being prepared (Draft status) or out (Open status).
2. Let's view the details for the first book fair, currently checked out to Donna Milton at the Long Road High School. To do so, either click on the Details tab or press **Alt-D**.

The display shows us all the books included in this Book Fair, with their quantities Sent and Out:

Type	ISBN / SKU	Title / Description	UOM	Sent	Out C
Sale	0812543602	Mysteries of the Lost and Hidden Treasure	EA	5	5
Sale	1893577090	Speechless in New York	EA	5	5
Sale	0531163806	Energy Projects For Young Scientists	EA	5	3

Some titles, like *Energy Projects for Young Students*, may have fewer copies Out than were originally sent, either because some were transferred back to the store or because the book fair has already been updated with sales information.



If we look at the Inventory file record for any of these books, we will see that the copies currently out to a book fair are treated as On Hold: that is, belonging to

the store's Inventory but not currently available for sale over the counter.

OnHand	1
OnHold	5

When the book fair is completed, you can update the Anthology main system by counting the books returned or by entering sales. Book fair lists can be archived and cloned for re-use.



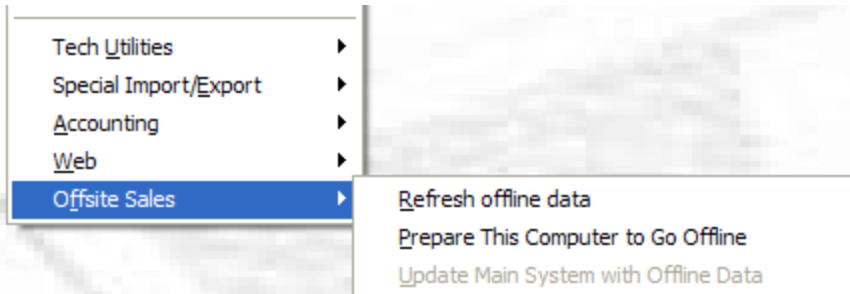
The Book Fair screen's Scan Mode option allows you to use a barcode scanner for super-fast counting.

Book fairs can be made even easier with the optional Offsite Sales module described just below.

When you're done exploring the Book Fair screen, press **Esc** to close the screen.

## Offsite sales

Booksellers who sell at book fairs, author signings, conventions, seminars and other venues away from the main store will want to consider the optional Anthology Offsite Sales module. With the Offsite Sales module in place, a laptop or other portable computer can be updated with information about the store's current Inventory as well as inventory to be taken to the book fair or other venue.

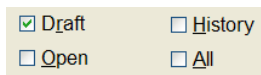


While at the book fair, you can make sales through the familiar Anthology Cash Register interface. New customers or even new inventory can be added, and you can take special orders for fulfillment back at the main store. When the offsite computer is reattached to the main network on return from the event, the main system’s inventory, customer and sales information are updated automatically.

### Web, mail, and phone orders: The Customer Orders screen

Orders placed when the customer is not physically present—orders from the web, mail orders, or phone orders—involve special challenges like back orders, multiple shipments and cancellations. The Anthology Customers Orders screen has the specialized functionality to deal with these and all the other issues such sales entail. Additional fields for separate billing and shipping information; invoicing information and special printing options, even special handling of deposits are all available in Customer Order. To see what the Customer Order screen can do, please take the following steps:

1. Open Customer Order by selecting the Sales | Customer Order menu option, if you have not already done so.
2. The screen opens on the List page. The List page provides a sortable overview of your Customer Orders. By selecting the checkboxes at the bottom right of the screen, you can choose to see Draft, Open, or All Customer Orders. You can also sort for a particular



order by Customer Name or Code, or by an item contained on the CO. A few more noteworthy features on the List page:

- Orders that have not yet been reviewed (for example, an order just downloaded from your website) are shown in bold face.

Status	CO #	Shpmt Quote	Created	CustCode	Customer	Item
Draft	0000010		6/4/2007	CLARKM	Clarke, Michael	
<b>Draft</b>	<b>000011</b>		<b>6/23/2009</b>	<b>JOHNSP</b>	<b>Johnston, Pame</b>	

- The Summary section at the bottom of the List page gives a quick overview of totals for COs in the status or statuses selected.

3. Select CO#000010 and click on the Header tab to move on to the Header page. This page shows detail about the order as a whole and the customer who placed it. In addition to standard information like billing and shipping addresses, historical information is also available. There are fields for Creation, Printing and Cancellation Dates, along with document and internal notes fields.
4. Click on the Details tab to move to the Details page.

The Details page shows essential header information about the order as a whole at the top of the screen.

Below the header, the grid area shows a list of all the items on the order, including quantity ordered, shipping, back ordered, etc.

Type	ISBN / SKU	Title / Description	UOM	Ord	Open	Ship	B/O	Cancel
Sale	0062517074	Angel Signs : A Celestial Guide to the Powers of Your Own Guardian Angel	EA	1	1	1		0
Sale	1401900828	Born Knowing : A Medium's Journey-Accepting and Embracing My Spiritual Gifts	EA	1	1	1		0

The data entry area just below the grid allows us to add items to the order or to edit existing items. To see how this works, please take the following steps:

1. If necessary, click on the F5 New Line button at the bottom of the screen.



2. Enter **0809324180** in the ISBN/SKU field and press Enter.

3. The cursor will move to the Ord (ordered) field, and a 1 will be suggested.

quantity of

4. Press Enter again. Now the focus has moved to the Ship field, and the program has once again suggested a quantity of 1. To see why, take a look at the InfoPanel area at the bottom of the screen. The InfoPanel provides detailed information about the current item; and as we can see from the OnHand field, we have 5 in stock—enough to fill this order. Press Enter one more time to move to the Enter line button and then Enter once again to add this item to the grid and to the order.

5. Now let's see what happens when we don't have the stock to fill an order. The cursor should be waiting for the next item on the ISBN/SKU field. Enter **0671042742** and press Enter.

6. Once again the focus moves to the Ord field; accept the default offered of 1 by pressing Enter.

7. Now the cursor moves to the Ship field. However, this time the Ship quantity suggested is 0. If we look down to the On Hand field in the InfoPanel, we can see why: this item is out of stock.



Note that the next field to the right B/O (back order) shows a 1 value. The program assumes that we (and the customer) want to back order this book. Of course, on some orders the customer may specify that no back orders are allowed, or it may be that this item is no longer available. In such a case, we could enter a 0 in the B/O field; the Cancel field  Allow BO  would then show a value of 1. Please note also that there is an Allow B/O checkbox in the header; if this box were unchecked then all out of stock items would be cancelled by default.

- Let's finish adding this item as a back order. To do so, press Enter twice to add the line to the order.

Anthology manages every aspect of complex orders including back ordered and cancelled items. You can ship the items you do have, while keeping the order open until the back ordered items become available; or you can put the existing stock On Hold while you wait to ship the entire order at once. The entire history of an order, including all its associated shipments, is always readily available.

The

Complete	0000010			6/4/2007	CLARKM	Clarke, Michael	3	3	0.00
Shipment	0000010	1		6/27/2009	CLARKM	Clarke, Michael	3	3	21.15
Shipment	0000010	2		6/27/2009	CLARKM	Clarke, Michael	3	3	17.97
Shipment	0000010	3		6/27/2009	CLARKM	Clarke, Michael	3	3	16.95

Customer Orders screen also provides for a wide variety of printing options. For example, you easily accommodate those cases where your customer needs a pro forma invoice or quote. Shown below is an example of a Pro Forma Invoice. Notice that item number two is a back order item.

*Pro forma invoice*

CO# 0000008 - 1

Your Store Name  
 100 Anystreet  
 PO Box 1  
 Anytown, MI 12345-1234

**IMPORTANT:** please refer to above number on all correspondence and packages

**B I L L T O** Amanda Jean  
 1453 Burdock Dr.  
 Kingston, NY 10011  
 USA

**S H I P T O** Amanda Jean  
 1453 Burdock Dr.  
 Kingston, NY  
 USA

ATTN:  
 CODE: JEAN

DATE	CUST PO	TERMS	WEIGHT				SHIP VIA		
3/4/2003									
	SKU1	Title/Description	Ord	UOM	Ship	B/O	Price	Disc	Extension
Sale	1860942296	Imperial College Handbook Of Maternal	1	EA	1	0	62.00	15.000	52.70
Sale	0070701830	Differential Diagnosis Of Chronic Pain :	1	EA	0	1	65.00	15.000	55.25
<b>Shipping</b>									0.00
<b>Sub-total</b>									107.95
<b>Tax</b>									6.48
<b>TOTAL</b>									114.43
<b>Total Tendered</b>									0.00
<b>Total Due</b>									114.43

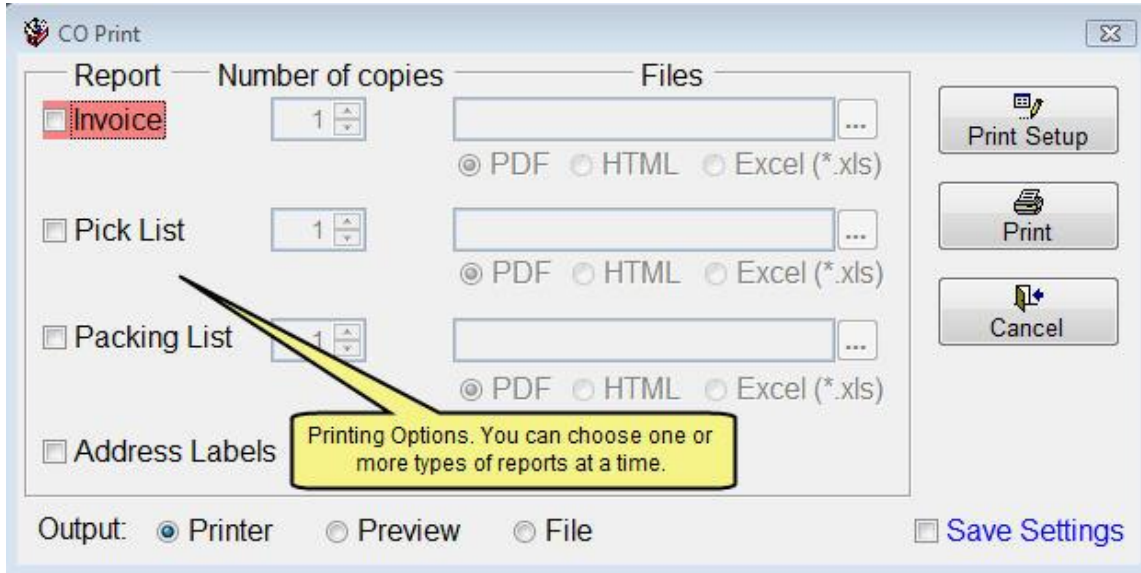
Whether your order comes from the web, or via phone, email or fax, Anthology offers printing options for every stage of the order. You can print invoices for billing, pick lists for pulling orders, packing lists to accompany your orders, or address labels to affix to packages.




Anthology allows you to print labels on special, dedicated label printers or on your laser printer.

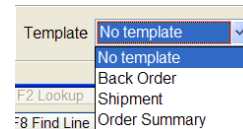
These printing options may be selected individually or combined to suit your needs. To see the Print options:

1. Click the F11 Print button on the screen.



2. To close the CO Print screen, click on the Cancel button.

If you have Microsoft Outlook on your computer, you can also communicate with your customers via email. When the customer for a given order has an email address on file with you, the email icon in the Anthology tool bar lights up green . When you select the email option, you can choose among customizable templates to inform your customer about back ordered items, shipments, or an order summary.



Finally, let's post this order so that all our changes are recorded.

3. Press F12 Post, and when queried say that you don't want to ship now.

If you are done exploring Customer Orders, press the Esc key to exit the screen.

## Inventory control



Having books available when your customers want them and returning slow moving items to their publishers or other vendors is vital to maintaining a healthy inventory. Anthology has the tools you need to keep your inventory stocked up and to evaluate the productivity of the items already on the shelf.

In the next sections we'll be talking about building Purchase Orders and how to get them to your vendor. We'll be looking at the Auto-generate and Manual generation methods and point out

some useful features to make life a little easier. We'll also discuss electronic ordering, including sending your orders via the internet. Then we'll talk about how to receive items into inventory as well as how to most efficiently prepare overstock returns to your vendors.

## Purchase orders

Let's begin by constructing a PO from scratch. Although Anthology gives you a number of ways to automate restocking or frontlist POs, building a PO from the ground up is a common operation; and creating a simple PO will give us a chance to see some of the important basic functionality in the Purchase Order screen. To see how it works, please take the following steps:

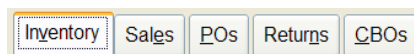
1. Open the Purchase Orders screen from the Inventory Control menu if you have not already done so.
2. Press the F4 function key or click on the **F4 New PO** button at the bottom of the screen  to create a new Purchase Order. You will be given the option to accept the next number in Anthology's stack or to create a number yourself. Choose Apply to accept the number suggested by the program.
3. The "Ord by" field should be highlighted blue. You can click on the button with a down-pointing arrow  to the right of the field to see a list of users of the system, or you can just type **Bob**. The system will suggest Bob Buyer as the creator of the PO. Press **Enter** to select, and then **Enter** again to move the focus to the Vendor field.



You maintain the list of users of the system, assigning them different privileges as you choose. See the section on *Staying Secure at the Cash Register* on p. 11 above for a fuller discussion.

4. Since we will send this PO to Baker & Taylor, simply type **baker** in the Vendor field and press **Enter**. Anthology will suggest Baker & Taylor (Test Account) as the vendor. Press **Enter** to select your choice.
5. There are a number of other fields that you can use in the header area: shipping instructions, a note to yourself about the PO, discount and shipping information, and so on. Since we are creating a simple PO, you can simply press the **Tab** key or the **Enter** key to move through the header fields until the focus reaches ISBN/SKU below; or you can simply click into the ISBN/SKU field with your mouse.
6. Let's begin by entering a book that is already in the sample inventory. Key in **037540516X** and press **Enter**. The cursor moves to the Ord (Order) field, and a quantity of 1 is suggested.

When making purchasing decisions, it's important to have up-to-date, accurate information about the titles you are considering. This is provided on the Purchase Orders screen (and many other Anthology screens as well) by the tabbed InfoPanel display located at the bottom of the screen:



- The Inventory page shows

general information about the current title, including On Hand, On Hold and On Order quantities; how many sold Last Week, Last Month, etc.; and when last received and last sold. The CustBO field shows us that there is a special order outstanding for this title.

- The Sales page shows more detailed information about the sales history for this title on either a weekly or a monthly basis. You can see the Sales page by clicking on its tab, or by pressing **Alt-E**.
- If we have this book on order or if we want to see more detail about current and past purchase orders containing this book, we can press **Alt-P** to see the POs page, or just click on the tab header.
- Overstock returns history (did we already have this book and return it as a poor seller? If so, when?) is available on the Returns page (**Alt-N**).
- Information about current and past customer back orders (including special orders) can be found on the CBOs tab (**Alt-C**). If you go to the CBOs page, you will see that we have special order outstanding for this book for Diane Vance. To get more detail about this special order, right click with your mouse on the line for Diane Vance, and select **Go to Parent**. You will be taken to the CBO Manager page, where you can see all the details concerning this special order. Close the CBOs Manager screen to return to your PO.



This ability to jump to a parent transaction is available in many other places in

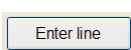
Anthology. For example, you can jump to a parent PO from the POs tab on the InfoPanel.

CustCode	Customer	Phone	Order	Qty	Date	PO #
VANCED	Vance, Diane	(888) 555-1212	SPO # 000005	1	5/27/2011	4-11-13 DM 0000010

- Suppose that we want 3 copies of this book. Click into the Qty field, and simply enter **3** from the numeric keypad, or when you are in the field use the **Up** and **Down** arrow keys to change the quantity to be ordered.
- There are still a number of values that can be set for this line item. We can change its list price, the discount we expect to receive, or whether or not back orders are allowed for this line; these fields can be reached using the **Tab** key while the focus is on Ordered. Typically however these values have already been set correctly in the header or by default settings. Press **Enter** once to move to the Enter Line button and then **Enter** again to actually add the line to our PO.



This



Notice that the discount field in the Detail Grid shows 40%. value is automatically supplied based on the discount

schedule entered in the Vendor master file record for the Baker & Taylor.

Now let's add an item that is not in the inventory, and see how Anthology's powerful Fetch technology can make the job of entering new titles easy.


1. In the ISBN/SKU field, type in **067003469X** and press **Enter**. After a brief pause, a message box appears informing you that the item has been found in the external database and asking if you want to add the item. Choose **Yes**.


What just happened? Anthology looked at your inventory and could not locate the ISBN for this book, *War and Peace*. The program then searched the external database and found it. This new title is now displayed on the Fetch screen.

The screenshot shows the 'Fetch' window with the following details:

- ISBN / SKU: 067003469X
- Item / UPC: [Redacted]
- Retail: 40.00
- List: 40.00
- Web: 32.00
- Alt ISBN: 9780670034697
- Title/Description: War And Peace
- Author: Tolstoy, Leo/ Briggs, Ant
- Preferred Department: Book
- Media: (None)
- Publisher: Penguin Group USA
- Distributor: Baker & Taylor (Test)
- Section1: (None)
- Section2: (None)
- Published: 1/11/2006
- Status: (None)
- Sales discount: 0.00
- Keywords: [Empty]
- Notes: [Empty]
- Text: [Empty]
- Make ISBN-13 primary:
- Stock Item:
- Used book:
- Web Exclude:
- Remainder:
- Trade:
- Short:
- No discount:
- User defined field 1: [Empty]
- User defined field 2: [Empty]
- User defined field 3: [Empty]
- Publisher: Penguin Group USA
- Binding: HRD
- Subject: Literature: Classics
- Skip initial screen:
- Serialize:
- Buttons: F1 Help, F6 Inet Stock Check, F9 Cancel, F12 Save

As you can see, the Learning functionality in Fetch has matched the external database's Publisher, Binding, and Subject data with our test inventory's Publisher, Department, Media and Subject categories. No edits need to be made there.

 There are a variety of settings available on the Fetch screen, and some of these settings can be "locked" for future titles imported in this session. For example if you were entering the day's special orders you might choose to lock the setting for Stock Item as unchecked. All items entered in this way will go into the Inventory as non-stock items and thus optionally excluded from inclusion when auto-generating POs based on sales (see below for more on the auto-generate process).

2. You may often find it useful when making purchasing decisions to be able to get up to minute stocking information from your vendors. You can always do so in Anthology simply by clicking on the Internet StockCheck icon on the toolbar  —or, on the Fetch screen, by pressing **F6** or clicking on the **F6 Internet Stock Check** button.

3. Close the Internet StockCheck screen either by clicking on the **F9 Cancel** button at the bottom of the form, or by pressing the **Esc** key.



The **Esc** (“escape”) key will close most Anthology screens.

4. You will be returned to the Fetch screen. Let’s add this record by choosing **F12 Save**. As you can see, the book has been added to the PO; at the same time, a record has been added to the Inventory master file with a zero on hand value.
5. To specify the quantity you want to order, press **Enter** to move to the Order field.
6. Suppose that we want 3 copies of this book. You can simply enter **3** from the numeric keypad here, or you can use the **Up** and **Down** arrow keys to change the quantity to be ordered.
7. You may want to experiment a bit more with Fetching and adding to your PO.



You may want to check the Skip Initial Screen checkbox on the Fetch screen to suppress the “ISBN found in external inventory, add to your inventory?” message on future Fetches.

8. Here’s a list of ISBNs not in the current Inventory and thus available to be Fetched:

141657168X

9781416594987

9781416549994

1439152926


1439129657



If the PO screen is not ready to add a new line, simply choose F5 New Line

Of course, you can enter any ISBN here, either from books you have in hand or from a publisher’s catalog.

9. When you are done adding records, you can press the **F10** function key to save your changes.

Although we have saved our changes, our PO has not yet been sent to the vendor. The best way to send your orders is via electronic ordering (discussed below; see p. 47); but some vendors don’t yet support electronic ordering. For such vendors, you can send the order via email  if you have Microsoft Outlook and an email address on file for the vendor:

Anthology PO #000002 - Message

To: btinfo@btol.com

Subject: Anthology PO #000002

Purchase Order 000002

Baker & Taylor (Test Account)  
 251 Mt. Olive Church Rd.  
 Commerce GA 30599 USA  
 Phone: (800) 775-1100  
 Fax: (800) 775-7480

B Your Store Name  
 I The Manager/Owner  
 L 100 Anystreet  
 L PO Box 1  
 Anytown MI 12345-1234  
 T Phone: (000) 555-1212  
 YOuFax: (000) 555-1212  
 TS14737

S Your Store Name  
 H The Manager/Owner  
 I 100 Anystreet  
 P Anytown MI 12345-1234  
 T Phone: (000) 555-1212  
 O Fax: (000) 555-1212

#	QTY	UOM	SKU	B/O OK?	DESCRIPTION	UNIT PRICE	DISC. %	EXTENSION
1	2	EA	0060087730	Y	Blt Cookbook : An American Passion	20.01	40.000	\$24.01
2	1	EA	1885173598	Y	Deadly Kin	23.95	40.000	\$14.37

DATE / / ACCT # SHIP VIA TERMS 2% 10 NET 30

Template: PO notification

Buttons: Generate, Send

Or, of course, you can print the PO and fax or mail it.

## Auto-generating purchase orders

Creating a frontlist or other PO with Fetch and the other Anthology data entry tools is fast and easy, but nothing compared to auto-generating purchase orders. PO auto-generation does just what the name implies: creates suggested purchase orders for so that you don't have to do the laborious research and data entry of creating your POs from scratch. You can create restock-type POs based on sales history or you can create POs based on a comparison of your on hand quantities with Min and Max values that you set for each item. You can also create POs that contain all your currently unprocessed special orders and other customer back orders. To see how auto-generating POs works, please take the following steps:

1. Close any Anthology screens that you may have open from an earlier exercise.
2. From the Inventory Control menu, choose Generate Purchase Orders.
3. Choose the Generation Method "Restock based on sales" from the drop-down list.
4. Choose a vendor to order from. Let's suppose we want to order from the Ingram Book Company.

Generate Purchase Orders

Generation method: Restock based on sales

Order from:
 

- Publisher
- Last vendor
- Preferred vendor
- Choose a vendor: Ingram Book Co. (Test Acc ...)

Adjust order quantity:
 

- Reduce requirement for:
  - Qty on hand
  - Qty already on order
  - Qty on draft POs

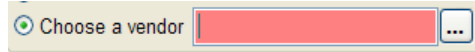
Filters:
 

- Restock with qty sold between: 1/12/2009 ... and 1/16/2009 ...
- Stock item only
- Ignore used books
- Sections: All
- Departments: All



5. Click with the mouse in the Choose a Vendor field.

6. Key in **ING** and press **Enter**.




7. Press F12 Select to select Ingram Book Co.



Instead of specifying a vendor to order from, we could have selected to place the titles we need to restock on POs for their publishers or for the last vendor they were received from; or for their preferred vendors as specified on the Inventory master file record for the title.

8. Now select a date range for your restock.

9. You can either type dates directly into the fields, or you can select dates by clicking on the Assistant controls  for the two date fields just below “Restock with qty sold between”. This will bring up the Anthology calendar control.



10. Enter a range of dates using either of the methods described above.



Choosing today's date for the ending date and a date a month or so earlier for the beginning one will usually give a good result. If your Anthology program was installed some time ago, you may have to set the beginning of the date range back further. Or contact Anthology Sales ([sales@anthology.com](mailto:sales@anthology.com)) for a fresh copy.

Let's also specify that we only want to reorder Stock items (that is, don't want to include titles that have been flagged as non-stock items; and of course there's no point in trying to reorder used books from a distributor like Ingram). Put a checkmark in the “Stock item only” checkbox.

11. To create the PO, choose **F12 Run**.

12. Confirm that you really do want to auto-generate a PO and the click on the **OK** button when the Process Complete message appears.

13. When the process has completed, close the Generate Purchase Orders screen by pressing **Esc** or clicking on **F9 Cancel**. Then open the Purchase Orders screen from the

Inventory Control menu. Our new PO should show up on the bottom of the List, with today's date and perhaps a different PO#:

Draft	000035	Ingram Book Co. (Test Account)	136	2,770.40	1,592.99
-------	--------	--------------------------------	-----	----------	----------

14. Double-click with your mouse on the line for the PO you just created for Ingram Book Company (Test Account).

15. The details for the PO we just created will be shown on the Details page.



You may have to scroll up to see all the titles on the PO. Simply use the **Pg Up** key, or move the scroll bar at the right of the grid to the top.

The books selected for this PO include titles from Random House, Simon, and other large publishers. Many booksellers prefer to order directly from large publishers because they can get a better discount by ordering directly instead of through a distributor. Let's move the Random House titles on this auto-generated Ingram PO to one for Random. To do so, please take the following steps:

1. The Publisher column should be visible in the Details grid on the Details page. If it is not, drag the scroll bar at the bottom of the grid to the right until you can see the Publisher column.
2. The PO should already be sorted by Publisher, as indicated by the italicized *Pub* column heading. If it is not, just click once with your mouse on the Pub column heading.
3. There should be 2 Random titles (Pub code "RANDO") on this PO. If they are not visible, you may have to scroll up or down in the alphabetized list of Publishers to find them.
4. Hold down the Control key, and click on the first Random House title. Then, continuing to hold down the Control key, click on the next Random title. The selected titles should

ISBN / SKU	Title / Description	Pub	CBO	Ord	List	Disc%	DiscLock	B/O	OK	Ext	TotRecv	Status	Sect1	Trc
031666343	Lovely Bones	LITLC		1	21.95	41.000		✓		12.95	0		FICT4	Trc
0375401202	Raising America: Experts, Parents, And A Century O	RANDO		1	27.50	41.000		✓		16.23	0			Trc
0375400354	Gift of Southern Cooking: Recipes and Revelations fr	RANDO		1	29.95	41.000		✓		17.67	0		COOK	Trc
1416594884	Most Wanted Man	SIMON&S2		1	28.00	41.000		✓		16.52	0		FICT4	Trc

show a dark blue highlight like this:

1. Click on the Actions menu at the top of the screen and choose **Move to Another PO** (about halfway down the list).
2. When you do, a screen will appear allowing you to select the PO you want to move the currently selected items to. Double-click on the line for the Random House PO#000003.

The selected items are removed from the current Ingram PO and added to the selected Random PO. The process can be repeated for other vendors from whom you order directly.

As you can see from the Actions menu, in addition to **Move to Another PO** there are a number of functions that Anthology provides to allow you to manage and reorganize your POs:

- **Merge** allows you merge the entire contents of the current PO into a selected PO; the current PO goes away.

- **Copy to Another PO** sends copies of the currently selected lines to another PO without deleting them from the current PO; you can specify the number of copies to add on the new PO. (This is useful if you want to get a couple of copies of a fast-selling title from your distributor but to order the bulk of your requirement from the publisher.)
- **Regroup** takes all the items on a PO and reassigns them to POs for their publishers. Use this function when a PO has gone through a process of cascaded electronic orders with several distributors; the books that are left must be ordered directly from their publisher.

Anthology provides you with a host of tools for creating and editing purchase orders. Please feel free to explore the purchase order functionality using the sample data provided. Then, when you're ready, let's move on to one of Anthology's most powerful and useful features, electronic ordering.

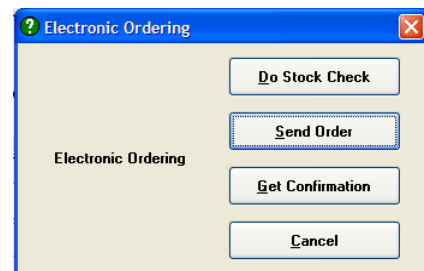
## Ordering electronically

"Just in time" inventory management has transformed bookselling, and a key element is electronic ordering. Placing orders electronically has many advantages for a bookseller:

- Quicker turnaround times allow you to reduce inventory levels.
- Orders transmitted electronically receive better discounts from the vendor.
- Electronic ordering allows for faster turn-around times on orders. Combined with Anthology's knowledge about what you have, what you've sold and what you need, that means you don't have to keep as many copies of a title in stock—instead, you can order them just in time as you need them.
- And fewer copies of each title means you free up inventory dollars to increase the number of titles in your inventory.
- Confirmation documents are received from the vendor and applied to the PO. Cancelled items are cascaded to a new PO so you can order elsewhere if needed.
- And finally, electronic orders are just easier to do than old-fashioned print POs

The electronic ordering process works as follows:

- You create a PO in Anthology, either by entering it manually or by auto-generating it.
- You use Anthology to send the PO to a vendor who supports electronic ordering: a big distributor like Ingram or Baker & Taylor or a publisher like Random House or Simon (either directly or via a service like Pubnet/Pubeasy).



Anthology supports most major vendors providing electronic ordering services.

- In a short time—usually a matter of seconds or minutes—the vendor returns a confirmation file stating what they intend to ship, what to back order, etc.
- Anthology applies this confirmation file at your command to the original PO and “cascades” the items that could not be ordered (or back ordered) to a new PO for you. You can merge this order with another or reorganize it or edit it as you please.
- You electronically send the cascaded PO to another vendor, receive a confirmation file for that PO, cascade the balance, and so on until all books have been either ordered or cancelled.
- When the books arrive at the store, a receiving memo has already been prepared by the processing of the confirmation file so that receiving can be done with little or no data entry.



One area that is key in managing the cascading process in electronic orders has to do with whether or not back orders are permitted. Anthology provides you with fine-grained control at the line item level whether to allow back orders for a given title or not. Default values can also be set for the PO as a whole as well as for the vendor.

Disc %	Lock	B/O OK
21.95	<input type="checkbox"/>	<input checked="" type="checkbox"/>

## Receiving inventory

Receiving is detail work. It needs to be done quickly and accurately, without tying up a lot of time on the part of you or your staff. Anthology gives you the tools you need to manage your receiving tasks, including the new Quick Receive.

Anthology Purchase Orders start life as drafts. A draft purchase order (or other document) has no standing: the items on it are not yet on order (and may never be). It’s only when a draft PO has been posted—either explicitly by the user or automatically as part of the electronic ordering process—that it becomes an open PO, ready to be received against. In receiving, we work with open POs. Purchase Orders that have been posted and are waiting to be received are referred to as Receiving Memos when we work with them through the Receiving screen.

To begin with, let’s take a look at a PO that was sent electronically to a distributor, in this instance Ingram.

(Anthology does electronic ordering with dozens of vendors, including major distributors Baker & Taylor, Ingram, and Partners as well as publishers like Random House, Hachette, and Simon)

To do so, please take the following steps:


1. Select the Inventory Control menu and then Receiving. The receiving screen List page will appear.



The Receiving screen opens with the Open POs only option already selected. If

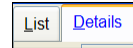
you want to research a PO that is completed, simply uncheck this box. Note also that you can search for POs by Vendor, by PO #, or by the ISBN/SKUs contained on POs.

When the Receiving List page opens, the focus is on PO#000010.

 The currently selected document is indicated here as elsewhere throughout Anthology by the small tick mark in the leftmost column of the grid.

Status	PO #	Sh
Open	0000010	


2. Click on the Details page tab to see the details of this purchase order.



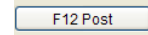
From the EO Sent field in the header, we can see that this order was placed electronically. Looking in the Notes, we can see that PO#000010 was created as the result of a cascaded EO at some earlier point.

EO sent 2/29/2008 2:36:

On the grid of purchase order details, we can see how the receiving memo has already been updated with information gleaned from the Baker & Taylor electronic ordering confirmation file. We can see, for example, that while most of the items on the order will ship in full, the first one shown, *Human Clay* (ISBN 6306864504) was not available and has been backordered.

 Remember from the discussion of POs above that you tell your vendors whether back orders are allowed or not on the POs screen before you send your electronic order.

When the order arrives, if there are no exceptions you can simply post the receiving memo as it stands using the F12 Post button. All On Hand and On Order numbers get updated correctly, and information that *Human Clay* is on back order is saved away as well.



Before going on to Quick Receive, let's see how Anthology helps you manage your special orders and other customer back ordered items at this crucial juncture. Please take the following steps:

1. Open the Inventory Control | Receiving screen, and select PO#000010 by double-clicking on its line to see the Details page, if you don't already have it open.
2. Click once with the mouse on the column heading labeled CBO



When you do, the display will sort with items with CBOs at the top:

ISBN / SKU	Title / Description	CBO
037540516X	Random House Chine	

3. Click on the CBOs tab on the InfoPanel on the bottom of the screen (or just press Alt-C).
4. Select the item with an associated CBO in the grid above, ISBN 037540516X.

You will see detailed information about the customer, including contact information like phone number, as well as any notes associated with the CBO. To see the full note associated with this special order, just click on the Assistant

Inventory	Sales	POs	Returns	CBOs
CustCode	Customer	Phone	Order	
VANCED	Vance, Diane	(888) 555-1212	SPO # 000005	

control  in the Note column on the CBO tab

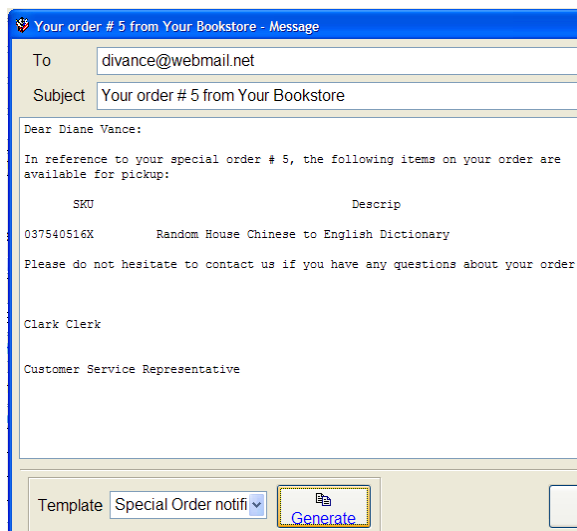
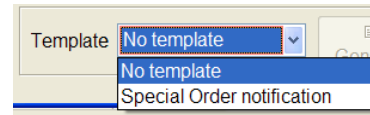
display.

5. Click on the line for Diane Vance, if you have not done so already.

Because this customer has her email address on file with us the email icon on the toolbar lights up green:



6. If you have the option, click on the green email icon on the toolbar.
7. Click on the Template box at the bottom left of the message screen and select Special Order notification. Then click on the Generate button. You will see editable email that looks something like this:



You can edit individual emails like this one if you like; and you can also redefine the email templates themselves on the Email Templates screen on the Master

Files menu.

Or perhaps you prefer to phone your customers when their special orders arrive. To do so:

1. If you still have the email message screen open, close it by press the **Esc** key or clicking on the **F9 Cancel** button.
2. Click on the **F11 Print** button or just press the **F11** function key on the keyboard.

3. Choosing from the options generate a list of

Printed: 7/4/2009 5:17:32 PM PO # 0000010 Baker & Taylor (Test Account)  
Customer Back Order Info

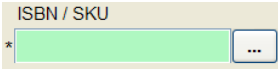
SKU	CBO qty	Reed qty	Title	Author	Ret
Customer: Vance, Diane					
1253 Pinewood Trail					
Trumbull					
USA					
CT Northeast					
06611					
Voice: (888) 555-1212					
divance@webmail.net					
Assigned customer(s)					
SPO # 5 6/28/2009 4:42:05 PM					
037540516X	1		1 Random House Chinese to English Dictionary	Random House, Inc. Staff	

Diane is buying this dictionary for her son, so don't leave a message with him!

**CBO Info**  
list of  
will  
compact  
crucial

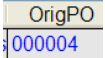


1. Please close any Anthology screens you may have open, and then choose Quick Receive from the Inventory Control menu.
2. Click on **F4 New QR**
3. Let's suppose we are receiving a shipment from Baker & Taylor. Enter **baker** in the Vendor field and press **Enter**. When the Vendor Assistant screen opens, press **F12** to select Baker & Taylor.

4. The cursor should now be blinking in the ISBN/SKU field, which should have a pale green background color.  The green ISBN/SKU field is used throughout Anthology to indicate that you are in scan mode.



Scan mode is a method of data input optimized for use with a barcode scanner which greatly reduces the amount of keyboard data entry that must be done, leaving both hands free to scan and handle books

5. Quick Receive is optimized for use with a barcode scanner. Since you probably don't have one of these devices available, we will have to simulate its behavior. You can do so by keying in **188539456X** and pressing **Enter**.
6. When you do, the item is added to the Quick Receive memo grid above. Please note the OrigPO column, which shows that this item was originally on PO# 000004. Note also that the Recd (Received) column shows 1. 
7. Let's receive a second copy of the same book. Once again, key in **188539456X** and press **Enter**. If you look closely in the grid, you'll see that the Recd quantity has changed to 2.

Of course, keying in ISBN numbers in this way is not particularly fast. But you can easily see that with a bar code scanner in hand, you or your employee can go through a pile of books in a hurry.

8. Now let's add another book from another PO. Key in **0060394420** and press **Enter**. The item is added to the grid with a quantity of 1 but with PO# 000005 shown in the OrigPO field.

When we post this Quick Receive, both PO# 000004 and PO# 000005 will be updated to reflect the fact that these books were received. If a PO is completed as a result of Quick Receiving, its status changes to Complete.

You can see that Quick Receive simplifies receiving, making what was a relatively skilled and time-consuming task one that can be performed by almost anyone, in very little time.




## Overstock returns

Efficient inventory management is not just about ordering and receiving the books you want. It's also about trimming out the deadwood—sending those books that haven't sold back to your vendors, thereby generating valuable credits that reduce your accounts payable obligations.


Let's begin by taking a look at how to create an Overstock Return memo in Anthology. To do so, please take the following steps:

1. Close any Anthology screens that you may have open.
2. On the Inventory Control menu, choose Overstock Returns.
3. The Overstock Returns screen will open on its List page.

The Overstock Returns screen is almost identical to the Purchase Order and the Receiving screens and functions much the same way.

 Anthology uses a consistent interface throughout that conforms to familiar Windows standards. This approach makes it easier for you and your employees to learn to use the program.

4. On the List page select return invoice #000002 and click on the Details tab.
8. In the ISBN/SKU field enter **0023150602** and press **Enter**. The cursor will move to the **Qty** field. If you look down at the InfoPanel at this point, you will see that the On Hand field to right shows you have 12 on hand. Let's return all copies of this book. In the **Qty** field, enter **12**. Press **Enter**.

 Some vendors require that a list be sent and permission granted before books can be returned. When the "Vendor permission required" field is checked and the return memo is posted, Anthology puts the quantities set aside On Hold until

Vendor \* Baker & Taylor (Test Account) ...  
 Vendor permission req'd

permission is granted and the books are actually sent out to the vendor.


9. The cursor will move to the Reason field. We can choose here from a list of possible reasons to return this book. Click on the Reason field and select OVR (Over Stocked) as the reason for the return. Press **Enter**.

Reason	Invoice	Inv
OVR		/
DEF	Defective	
DI	Damaged Item	
MIS	Short shipped	
NOR	Not ordered	
OVR	Overstock	
OVS	Overshipment	
WRO	Wrong book	

10. The cursor will now move to the Invoice field. Many vendors will provide better terms if the bookseller can specify the vendor invoice number and date on which book appeared. Fortunately, with Anthology you have this information at your fingertips. Move to the InfoPanel and select the Invoices tab. You should see three

Inventory	Sales	POs	Invoices				
Invoice	InvDate	Vendor	Qty	List	Disc %	Amount	
1000-200	2/25/2007	Ingram Book Co. (Test Account)	9	21.95	42.50	1622.63	
1000-007	12/9/2005	Bookazine (Test Account)	4	21.95	42.00	3356.05	
4000-10	12/8/2005	Baker & Taylor (Test Account)	10	21.95	42.00	1340.31	

invoices that this book was received on. Let's select Return Invoice 4000-10 from the list. Right click and choose "Associate this Invoice" or simply double click the line.

11. Please note the **Del** checkbox. If you select this option, then the  book in question is not only returned to the vendor, but also removed from your Anthology inventory.


Click the **Enter line** button. You can now experiment with adding more lines to the return memo if you choose. When you are ready to move on, please press **Esc** to close the screen.

## Auto-generating overstock returns

Creating a return memo as described above is quick and easy if you have a pile of books you know you want to return. Sometimes you will want to use the power of Anthology and the rich data store it has accumulated about your inventory to suggest items for return. The Generate Overstock Returns screen does just that. To see how, take the following steps:

Choose Generate Overstock Returns from the Inventory Control menu.

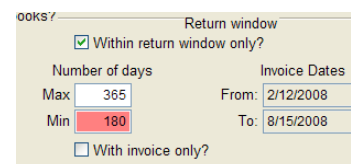
Return Invoices can be merged with other Return Invoices to pad shipments and reduce costs.

1. As with the Generate Purchase Orders screen, we can make the focus of this operation as wide or as narrow as we choose. For example, we could choose to thin a given subject category by selecting it in the Sections field. Or we may choose to return to a particular vendor to improve our payables status with them. Let's do a return to Baker & Taylor. In the "Return to" section let's select the "One Vendor" option. Click on the ellipsis button  and choose Baker & Taylor from the Vendor Assistant.
2. In the section labeled "Vendor Source", select the All Vendors option. This means we will be considering books from all publishers for return to this distributor.
3. We won't be defining a return window at this time, so we can leave the fields in the "Return window" section of the screen blank.



You can define your vendor's return window (the period, usually defined in days, during which a title can be returned at the best terms) on the vendor's master

file record. The Auto-generate Overstock Returns screen can use this information to define which of your books are eligible for return.



The Auto-generate Overstock Returns screen can use either of several options for deciding which books should be returned:

- It can select for books that have not sold since a certain date (while filtering out recent arrivals)
- It can compare the current on hand quantity with a requirement based on sales history
- It can compare the current on hand quantity with a Max (maximum) value defined on the inventory screen



You can also define your own conditions for selecting books for return by using the powerful Query feature described elsewhere in this manual.

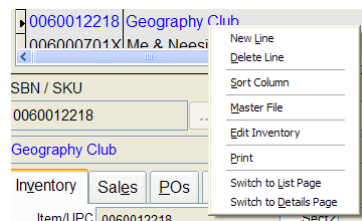
4. Let's choose the "On hand > Max" and "Reduce to Max" options.

On hand > Max       Return all       Reduce to Max

5. Press the **F12** function key to run.
6. Answer Yes to confirm that you want to generate Return Invoices.
7. Click OK on the "Process Complete" message box.
8. Click **F9 Cancel** to close the Generate Overstock Return screen.

Let's take a look at the newly created Return Invoice. To do so, please take the following steps:

1. Choose Overstock Returns from the Inventory Control menu.
2. Locate the newly created Return Invoice. It should be #000003. If not, it will have the current date listed as the creation date.
3. Click on the Details tab.
4. In the grid, click on the line with the title *Geography Club*. The program has suggested that we return 16 copies of this title. As we can see from the Inventory tab on the InfoPanel, we currently have 26 of this title on hand. By returning 16, we will reduce the on hand quantity to 10—the Max value which has been established for the title on its master file record. Of course, you can edit this or any other record on the return memo before posting.
5. To see more detail about this title, its Min and Max settings, click with your mouse button on the title in the grid, and Edit Inventory from the shortcut menu appears.



including right choose that



Anthology uses shortcut menus throughout the program to give you fast access to important functions. In this case, the Edit Inventory screen allows you not only to see more detail about the current record, but also to make changes to it.

6. Click **F12** to post our changes. The program will offer you an opportunity to print if you have done so already. Choose **No**.
7. Close the screen.

We have only scratched the surface of this versatile and powerful tool. A complete discussion of this screen can be found in the Anthology help system. To view this please select the Help menu option and locate *Using Anthology | Inventory Control | Overstock Returns | Auto-generating Overstock Returns*.

## Other inventory control tools in Anthology

In addition to purchasing, receiving, and managing overstock returns, Anthology provides you with a number of other tools to manage your inventory. Here are a few other screens also found on the Inventory Control menu:

### Transfers in and transfers out

Merchandise can come in and out of your inventory without passing through a “normal” process like sales, receiving, or overstock returns. For example, you may receive promotional copies of a book at no cost; or you may make a donation of merchandise to a local library or charity. In the former case, the Transfers In screen lets you specify the items and quantities you are adding:

ISBN / SKU	Title / Description	CBO	Req	Recd	List	Retail	Ext
9990818401	Biology : Visualizing Life		1	1	41.26	41.26	41.26

In the same way, the

Transfers Out screen helps you track stock that is leaving the store without having been sold or returned to a vendor. A useful application is the case where you want to restock a book fair currently in progress:

### Physical inventory

Making sure that your on hand quantities are correct is essential. Shrinkage, mistakes, and other factors can all result numbers that are incorrect. Many retailers’ business rules require that they periodically count their inventory for accounting and other purposes.

Anthology’s built in Physical Inventory module makes the task of counting your books as easy as it can be, with support for small, portable scanners, partial inventories, etc., as well as a wizard to guide you through the creation of the physical inventory.

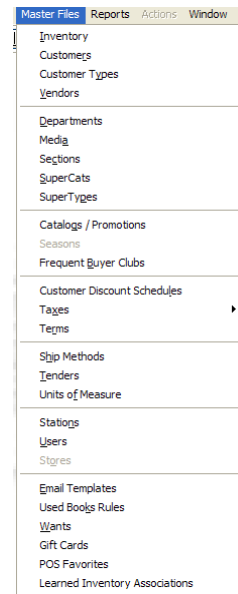


Anthology has portable scanners suitable for taking physical inventories for rent or sale. Please contact Anthology Sales for details.

## Master files

Anthology’s master files store essential information about your inventory, customers, vendors, and a number of other important business entities. All the Anthology master files are available for viewing and maintenance on the Master Files menu.

All the master files screens share certain features: for example, each has a List page and a Details page. Some, like the Inventory screen, also have a number of other pages offering information on sales history, POs and PO history, overstock returns and so on. Many have links allowing you to “drill down” for more information about purchase orders, special orders and the like.

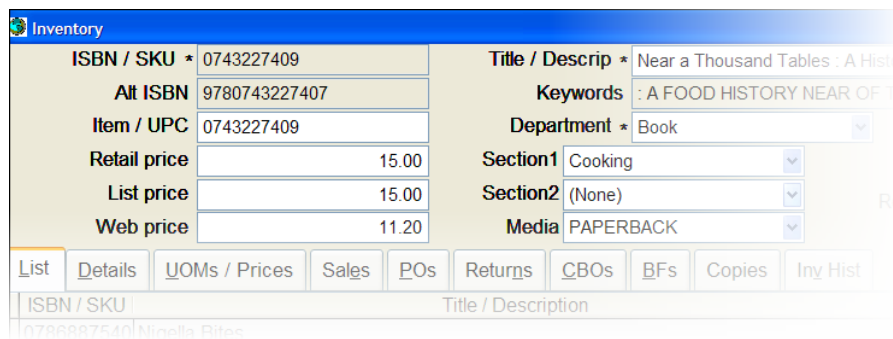


## The Inventory screen

The Inventory master file screen is one of the system’s most important. To begin exploring it, please take the following steps:

1. Choose Inventory from the Master Files menu. The screen will open to the List page.

At the top of the page is a header area with essential details about the current record. Below the header, a row of tabs allow you focus in on specific aspects of your inventory, such as Sales, POs, CBOs and the like:



When you first open the Inventory screen, you will be on the List page. The List page presents a sortable list of your entire inventory.

2. Click once on the Title/Description column heading. When you do, the heading will show italicized, and the titles will sort in ascending order.

<i>Title / Description</i>
Natural Pharmacist : Everything You Need to Know
Natural Pharmacist : Relief for Anxiety and Insomnia
Natural Weight Loss : The Complete Guide
Nature Projects For Young Scientists

as

3. Click again on the Title/Description column heading. The heading will show as underlined, and the titles will sort in descending order.

<u>Title / Description</u>
New Book Of Salvias : Sages For Every Garden
Nevada
Netherland
Neighbors Respond : The Controversy over the
Nebraska
Near a Thousand Tables : A History of Food
Nature-Speak : Signs, Omens and Messages in

4. Try clicking and sorting on some of the other columns, like Author. Note that they all behave the same way: you can always choose either ascending or descending order, and you can always move around in the list by using the

<i>Author</i>
Lawton, Wendy
Le Carre, John
<u>Le Carre, John</u>
Leclair, Normand
Lee, Carol

same way: order, and type-ahead



feature.

In addition to sorting columns, you can also resize them and even change the order in which they appear in the grid. Anthology remembers your preferences and restores them the next time you open the screen

ISBN / SKU	Author	Title / Description
0802436374	Lawton, Wendy	Almost Home : A Story Based on th
1416594884	Le Carre, John	Most Wanted Man

Sorting and using the type-ahead

feature is a quick and intuitive way to find an item, but sometimes you will want the power of a more robust search.

The Search field, located at the bottom

Search by:  Keywords  Author  ISBN / SKU  Title / Description  Reverse ISBN / SKU  Show inactive records

of the screen, allows you to search by keyword, title, author, ISBN and even reverse ISBN—or to use Quick search, which includes all of the above.

For most users of the program, the keyword search is the easiest and most-commonly used search. With a keyword search you can enter any combination of words (or part of words) from the title, in any order. To try the keyword search, do the following:

1. Click once in the long field at the bottom of the screen, below the caption “Search by:”

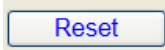
Search by:  Quick  Keywords  Author  ISBN / SKU  Title / Description  Reverse ISBN / SKU

Search Reset

The field will show a coral color that means it is ready to accept a search. Quick search should be selected by default. Suppose we want to find David Sedaris’s book *When You Are Engulfed in Flames*.

2. Enter the following: **YOU FLAMES** and press **Enter**. The grid displays with *When You Are Engulfed in Flames* as the selected item.

The use of the Author and ISBN searches is apparent. The Reverse ISBN is not as obvious, but very useful in this ISBN-13 world. To see it in action, take the following steps:

1. Click on the Reset button to get ready for a new  search.
2. Enter **004** and press **Enter**. The display will show those items whose ISBN/SKUs end in **004**. Entering more numbers will result in a smaller and more accurate search result.

ISBN / SKU	Author	Title / Description
0345495004	Horan, Nancy	Loving Frank : A Novel
0763815004	Arford, Joanne Marschke/	Microsoft Advanced Word 2002 :
6306541004	Beethoven Quartet	Alyabiev:Quartet No. 1/Quartet No

If you want to specify that only keywords, author names, titles, or reverse ISBN numbers be searched, simply select the search type desired by clicking on it.



In addition to the keyword and other searches, you can create complex searches and queries by using the Construct a Query function on the Inventory screen Actions menu described below.

Now that we've explored the List page, let's take a look at some of the information available on the Inventory screen. Please take the following steps:

1. Click on the Reset button to clear your last search, if you have not already done so, and select the Keyword search again. Enter **ROSSL** and press **Enter**.

You should see two records for *Rosslyn: Guardians Of The Secrets Of The Holy Grail*. One, ISBN/SKU 0007133073-03, is a used copy of the title. We'll discuss used books in more detail below.

2. For now, please click on the line for ISBN/SKU 0007133073, the new, unused version of *Rosslyn: Guardians Of The Secrets Of The Holy Grail*.
3. Click on the Details tab.

Let's take a look at some of the features of the Inventory screen, starting with the header area at the top. In the topmost left corner of the screen are a series of identifiers for your items. As shown in our demo data, the ISBN is given as 0007133073. Immediately below in the Alt ISBN field we see the ISBN-13 equivalent form, 9780007133079.



Anthology switches freely between ISBN-10s (still the predominate form found in the bookselling world) and the newer ISBN-13s. We have referred mostly to ISBN-10s in this manual simply because they are easier to type. If you would like to see the data with ISBN-13 as the primary form and ISBN-10 as the Alt ISBN, you can do so for this book by choosing Make ISBN-13 Primary from the Actions menu; or you can globally change the entire inventory from the Options screen.

The third identifier available is labeled Item/UPC . This field is available for the cases when, as often is the case with non-book merchandise, the barcode printed on the packaging encodes a UPC number instead of the manufacturer’s own identifier. This field lets Anthology recognize a scan at the Cash Register, while reserving the primary identifier (used on POs, etc.) for the vendor’s SKU.

ISBN / SKU *	DEP-56.56810	Title / Descrip *	LEGO LITTLE BUILDERS
Alt ISBN		Keywords	BUILDERS LEGO LITTLE ...
Item / UPC	3440919164	Department *	SEASONAL MERC
		Used	<input type="checkbox"/>

You can assign a web price distinct from the standard retail price, as well as the list price that is used on POs and other vendor invoices.

Retail price	16.95
List price	16.95
Web price	12.76

You can also manage more complex pricing allowing for multiple units of measure (UOMs).

- Click on the UOMs/Prices tab.


UOMs allow you to buy by the box and sell by the card (or to sell by the box or by the card). (For more information on UOMs and how to use them, see the topic “Setting Up Units of Measure” in the Help system.)

List	Details	<b>UOMs / Prices</b>	Sales	POs	Returns	CBOs	BFS	Copies	Iny_Hist
UOMs									
UOM	Name	Select	Purch Default	Sales Default	Retail Price	List Price			
BOX	Box of 10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8.00	4.00			
DOZ	DOZEN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
EA	EACH	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1.00	0.40			
Condition					Retail price	8.00	List price	4.00	

- Click on Details to return to the Details tab.

Inventory items can be assigned a Department (Books, Toys, Café, etc); two Sections (Religion, History, etc) and a Media value (paperback, hardcover, e-book, etc).

Department *	Book
Section1	Religion
Section2	History World
Media	PAPERBACK

 Departments, Sections, and Media are user-defined, so that you can categorize your store’s inventory in a way that makes sense to you.

Books that are on reserve (held for special order pickup, committed on a customer order, waiting to permission to return, etc.) are shown as On Hold. These are deducted from the quantity owned (“On Hand”) to show the quantity Available for sale.

Available	3	Sta
OH	8	OO
OnHold	5	

Looking down on the Details page proper, we find key dates:

Dates	
Created	6/8/2008
Published	6/10/2003 ...
First recv'd	2/11/2008
Last sold	1/12/2009
Out of stock	/ /


- The date the record was created
- The publication date for the book
- When it was first received
- When it was last sold
- When it went out of stock


Last Receipt	
Date	2/29/2008
Cost	9.17
Discount	42.50
Vendor	INGRA
Invoice #	1000-200



Detailed information about the last receipt of the book is also available, including date, cost, discount received, vendor, and invoice number.

For more detailed information on the purchasing history of this item:

- Click on the POs tab 

- Check the box labeled 'Shipments' at the bottom of the  screen

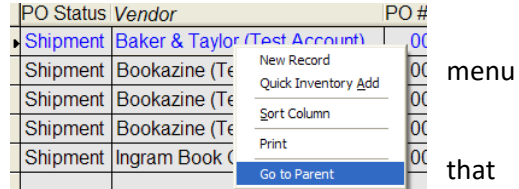
A sortable list of all shipments including this book shows in the grid.

You can, if you choose, see the whole receiving memo associated with each of these shipments. To do so, please take the following steps:


PO Status	Vendor	PO #	PO Date	Rec Date	Ord	TotRec	Open	InvDate	Ext Ord	ExtRecd	Invoice	Recd
Shipment	Baker & Taylor (Test Account)	0000008	2/22/2008	2/22/2008	10	0	10	12/8/2005	92.50	92.50	4000-10	10
Shipment	Bookazine (Test Account)	0000006	2/11/2008	2/11/2008	2	0	2	12/8/2005	18.50	18.50	1000-006	2
Shipment	Bookazine (Test Account)	0000007	2/12/2008	2/12/2008	8	0	8	12/9/2005	74.00	74.00	1000-007	8
Shipment	Bookazine (Test Account)	0000009	2/29/2008	2/29/2008	10	0	10	1/15/2006	92.50	92.50	1000-100	10
Shipment	Ingram Book Co. (Test Account)	0000011	2/29/2008	2/29/2008	14	0	14	2/25/2007	128.38	128.38	1000-200	14


- Right-click with your mouse on the first line, the Baker & Taylor shipment associated with PO #000008.

- Choose Go to Parent from the shortcut that appears.




- You will be taken to the receiving memo documents this shipment, with the line item you are researching selected. When you are done looking at the RM, press **Esc** to close the Receiving screen and return to the Inventory screen.

 Depending on the checkbox selected on the POs tab, you can view draft POs, open POs, or all types of PO activity.


- When you close out the Receiving screen, you will be returned to the Inventory, POs page. Click on the Details tab. 

At the bottom right of the Details page, you can see summary information about the sales history of this item.

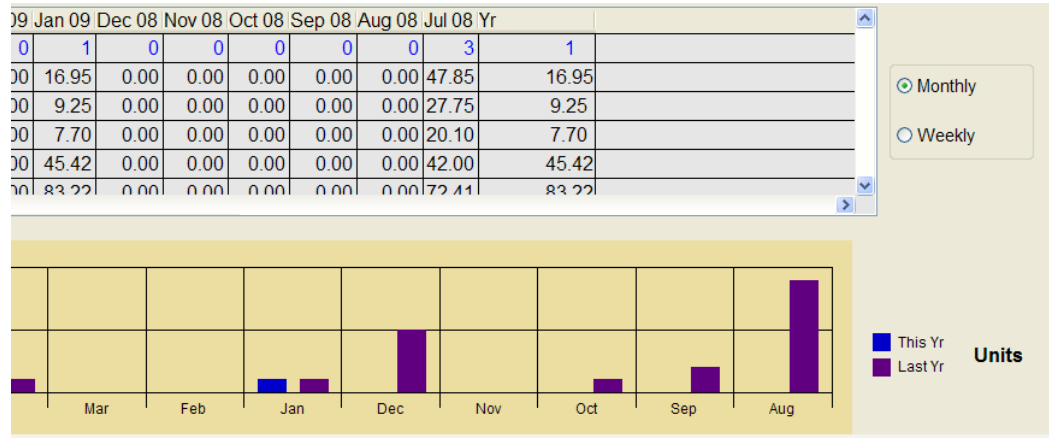
Sold Lst Wk	0
Sold Lst Mo	0
Sold Lst Yr	26
Sold This Wk	0
Sold This Mo	0
Sold This Yr	1

 The figures you actually see in this display will vary according to when you run the software.

Once again, we can get more detailed information elsewhere on the Inventory display. To do so:

- Click on the Sales tab. 

- The Sales page shows information about sales in both spreadsheet and graphic form, on either a weekly or a monthly basis.



There are many other ways to get sales historical information which we'll be discussing below. For now:

3. Click on the Details tab to return to the Details page of the Inventory screen.

Continuing our exploration of the Inventory Details page, we can note three user-definable fields at the bottom of the page. While the Inventory screen has fields to store most kinds of information that most booksellers want to track, it also allows for the possibility that users will want to create their own categories of information. For example, you might want to track which of the newsletters from your regional booksellers' association a title appeared in. In that case, we would want a field labeled "Regional newsletter" or something of the sort. To see how we would create such a field, please take the following steps:


User defined field 1
User defined field 2
User defined field 3

1. Close the Inventory screen, either by pressing **Esc** or by clicking on the **X** in the upper right hand corner. Also close any other Anthology screens you may have open (but not the Anthology application itself).
2. On the Tools menu, choose Options.
3. Click on the tab labeled "UDF".




The UDF page allows us to specify the names we want to use for user-definable fields on the Inventory, Customers, and Vendors screens. The cursor should be blinking in the "User defined field 1" field under Inventory.

4. Press **Ctrl-A** to highlight the contents of this field, and then assign a name of your own choosing to the user-defined field: for example, "Regional newsletter".
5. Press **F10** to save your changes, and then **Esc** to close the Options screen.


 You will be warned that you must close and restart Anthology for your changes to take effect. In a real, production environment we would take this step, but today we can ignore it.

- Return to the Inventory screen by choosing Inventory from the Master Files menu.

 The focus should still be positioned on the record we were looking at when we last closed the Inventory screen. Anthology “remembers” this kind of information about selected records and documents to make it easier for you to pick up where you left off.

- Click on the Details tab. You should see the label you on the Options screen now attached to the first user-field.


Regional newsletter	assigned
<input type="text"/>	defined
User defined field 2	
<input type="text"/>	
User defined field 3	
<input type="text"/>	

 You can use the information stored in the user-defined fields in sales history reporting, queries, and other reports.

There are a number of other noteworthy fields on the Details page (publisher and vendor information on the left, web information on the right), but let’s take a look at some of the other pages on Inventory screen.

- If you are still on the record for *Roslyn: Guardians Of The Secrets Of The Holy Grail* simply click on the Inv Hist tab.

[Inv Hist](#)

 If you are on another record, click on the List tab and make sure Keyword search is selected. Type in **ROSSL** and press **Enter**. Then choose the Inv Hist tab.

The Inv Hist (Inventory History) shows just what its name suggests: all the Anthology transactions that have affected the On Hand quantities of this item. You can focus in on one type of transaction by choosing Sales or one of the other checkboxes at the bottom of the display, or you can use All (the default) to see all types of transactions.

RM	2/22/2008	0000008-1	10	EA	15.95	42.000	Baker & Taylor (Test Account)	BAKER	
RM	2/29/2008	0000009-1	10	EA	15.95	42.000	Bookazine (Test Account)	BKAZN	
RM	2/29/2008	0000011-1	14	FA	15.95	42.500	Ingram Book Co. (Test Account)	INGRA	

Sales
  Buys
  SPOs
  Receiving
  Overstock Returns
  Transfers Out
  Transfers In
  OnHand Edits
  All

Other Inventory screen pages worth exploring include:

- **Returns** shows overstock returns history, including draft, open, and completed return memos.
- **CBOs** shows information on all customer back orders, including special orders, for this item.
- **BFs** shows information about all book fairs containing this item.
- The **Copies** page is enabled when the optional used book module is in use and is discussed below in connection with used books. It shows on hand and sales history information about all the serialized copies of the current title.

## Some special Inventory screen functions and actions

### Cloning Inventory records

Fetch and Quick Inventory Add make adding new books fast and easy. But what about adding large numbers of non-book items? There are no standardized external databases of toys, cards, and other such items. Anthology's Clone function can help.

Let's suppose you entering a line of cards produced by a local studio. Take the following steps:

1. Go the List page on the Inventory screen, if you are not already there.
2. Select the Keywords search, key in **DOWN CARDS**, and press **Enter**.
3. Click on the Details tab.

You should see the record for SKU #AC-203, *Downtown historical photo cards*, from Oakville Designs. Let's suppose we want to add some more items from the same line. Most of the

ISBN / SKU *	AC-203	Title / Descrip *	Downtown historical photo cards
Alt ISBN		Keywords	CARDS DOWNTOWN HISTOF ...
Item / UPC	339992235	Department *	Stationary <input type="checkbox"/> Used <input type="checkbox"/>

particulars of these items—the vendor, probably the price and description—will be the same or similar. We should not

have to re-type all this information!

4. On the Actions menu, choose "Clone this record".

You will now have a new record which is an exact copy of the original, except that the ISBN/SKU field is blank.

ISBN / SKU *		Title / Descrip *	Downtown historical photo cards
Alt ISBN		Keywords	
Item / UPC		Department *	Stationary <input type="checkbox"/> Used <input type="checkbox"/>

You can now enter a new SKU for

the

new item, tweak the description and other information as necessary, and save your changes. You're ready to create the next item in the series.

### Merging records

It sometimes can be useful to merge Inventory records. Suppose for example that you have stocked *Frommer's England 2008*. Now it is being replaced by *Frommer's England 2009*. You won't be carrying the 2008 edition any longer; but you would like to carry its sales history and other information forward to the new edition. To do so, take the following steps:

1. Open the Inventory screen from the Master Files menu.
2. Select the Keywords search if it is not selected already, and enter ENGLAND 2008 in the search field. Press **Enter**.

*Frommer's England 2008*, ISBN 047013819X, will be selected.

3. Open the Actions menu and select "Merge this record with another".
4. You will be asked for the idInv of the record you want to merge this one into. Enter 1706 and then press F12.

The sales, purchasing and other history of *Frommer's England 2008* will now be associated with *Frommer's England 2009*.

### The Customers screen

The Customers screen on the Master Files menu is the central repository of information about your customers. You can easily get information about every aspect of your customers' business with you, including sales history, frequent buyer club status, special orders and the like. You can also get information about groups of customers by using the Construct a Query tool on the Actions menu.

To explore the Customers screen, please take the following steps:

1. Select Customers from the Master Files menu.



Click on Master Files, then Customers if you prefer using the mouse; or simply press **Alt-M**, then **R** to open the Customers screen. All Anthology screens and most Actions can be opened using keyboard shortcuts in this way.


The Customers screen will open on the List page. You can search for customers by their last name, by a customer code, by their full phone number, or by the last four digits of the phone (very effective).



You can specify on the Options screen which search should be pre-selected as your default search.

2. Let's look at the record for Sue Brown. Since the customer search is already set to search by last name, simply key in **Brown** and press **Enter** twice.

3. Click on the Details page or enter **Alt-D** to see the details for this customer.
4. As you can see, there is space here for important information, including:
  - Full billing and shipping address information, including phone and fax numbers and an email address.

 If you have listed an email address for your customer and if you have Microsoft Outlook installed, you can send emails to your customer directly from within a number of Anthology screens, using templates that you can customize and edit. Please see the discussion at p. 37.

- A discount schedule can be specified here and will automatically be selected when a sale is made to this customer.

Disc sched 10%

- A tax profile can also be specified and is applied by default on new sales.

Tax profile Resident

- A note of any length can be added.

Note  
4 grandchildren:  
Kayle (b. 2000);  
Andre (b. 1998);  
Renee (b. 1996); and

- As on screen, there are three user-defined fields for your use.

Reading club  
Mystery Mavens  
User defined field 2

the Inventory three user-defined

- You can specify whether or not a customer is to be included on your mailing list.
- Customers can be categorized by Type. The list of Customer Types is maintained by you; and sales history can be reported upon by Customer Type.

Type (None)  
(None)  
Mail  
Seasonal  
Walk-in  
Web

## Other pages on the Customers screen

### The Sales page

The Sales page provides summary information about the current customer’s sales history in both spreadsheet and graphic form. To view the Sales page:

1. Click on the Sales tab; or press **Alt-E**.

The Sales page shows a number of important metrics in a spreadsheet-style display, including units, dollars at retail, dollars at cost of goods sold, margin expressed in dollars, margin expressed as a percent value, and markup expressed as a percent.

	Units
	Retail \$
	Cost \$
	Margin \$
	Margin %
	Markup %

The display shown below graphs the currently selected row. For example, if you click on the Margin % row, the area below will graph Margin %. You can also view sales history by month or by week. To change to see weekly data:

2. Click on the radio button labeled “Weekly”. To return to a month-by-month view, click “Monthly”.

	07/12/09	07/05/09	06/28/09	06/21/09	06/14/09	06/07/09	05/31/09	05/24/09	05/17/09	05/10/09	05/03/09	04/26/09	Total
Units	2	0	0	0	0	0	0	0	0	0	0	0	2
Retail \$	10.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.16

### The Inv Detail page

The Inv Detail (Inventory Detail) page shows all sales history for the current customer in detailed form. To view the details of Sue Brown’s purchases, returns and other transactions, click on the Inv Detail tab.

The “CR sales” (Cash Register sales), “CO sales” (Customer Order sales), and “SPOs” (special orders) checkboxes should be selected by default. If they are not, please select them and check “Save settings”. Examples of each type of sale can be seen in the display.

Source	Date	Tran #	ISBN / SKU	Title / D
CR	12/5/2007	101657	0316866343	Lovely Bones
CR	1/4/2009	101683	068982937X	What Sisters Do Best/ What Broth
CR	1/4/2009	101683	0399234985	When It's the Last Day of School
CR	9/4/2007	101800	0023150602	Personal Financial Planning : Your
CR	9/4/2007	101800	6306864504	Human Clay
CO	3/17/2008	0000002	0446611778	Last Man Standing
CO	3/17/2008	0000002-1	0446611778	Last Man Standing
SPO	7/5/2007	000002	0060007028	Me & Neesie

### The Buyer Clubs page

The Buyers Club page lists all the Frequent Buyer Clubs this customer is enrolled in, with their current and cumulative balances.

### The Trade Credits page

If the optional used books module is installed, this page displays all transactions involving trade credits. Please see p. 78 for more on this page and trade credits generally.

## Reporting and access to information

Reports are essential. Anthology provides you with literally dozens of different reports, many highly customizable. It also provides information in a form that can be used—not just as printed reports, but also as graphs, spreadsheets, pdf files and other formats.

We’ll begin by taking a look at the Sales History Report in some depth, so you can get a feel for how Anthology’s reports work. Then we’ll look at the powerful custom report-creating functionality of Inventory, Customer, and Vendor queries.

### The Sales History report


Without a doubt one of the most useful and powerful of Anthology’s reports is Sales History. With the Sales History report, you can:

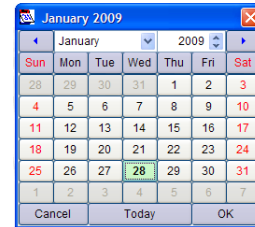
- Report on any range of sales history by date or even by time of day
- Filter by department, section, customer, vendor, user defined fields, and many other options
- Specify sorts with sub-totals up to three levels deep
- Print in a variety of formats
- Export reports to a spreadsheet or Anthology purchase order.
- Use special bestseller, slow sellers and other options


Let's take a look at what the Sales History Report can do. To do so, please take the following steps:

1. Open the Sales History report from the Reports menu.

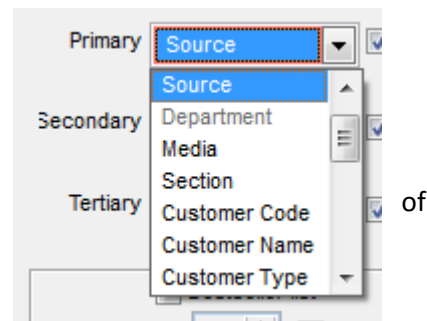
When the report form first opens, it should be set to report on a range of recent dates. (These dates may vary, depending on when you installed the program.)


2. Let's change the ending date for the report. To do so, please click on the ellipsis control  to the right of the later ("To") date field.
3. The Anthology Calendar control should open. Let's change the "To" date to today's date by clicking on the Today button on the control, and clicking **OK**.



 You can even specify a given time of day for the beginning or ending period of the report. This can be useful with quickly turning items, when you want to restock for all the merchandise sold since the last PO was created.

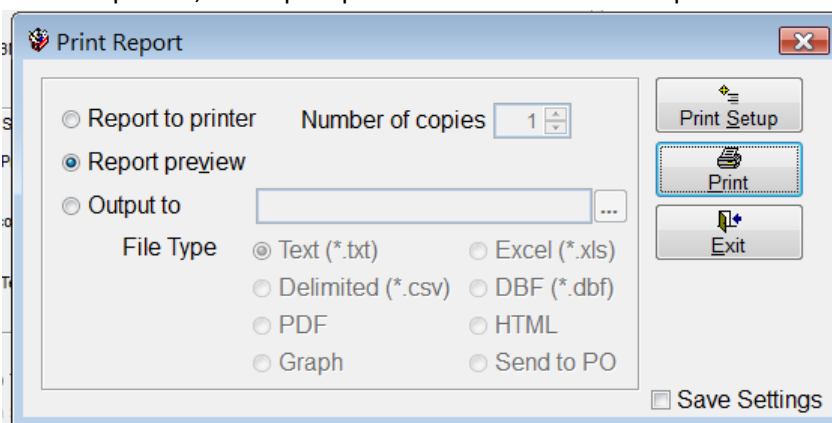
The report should be set to sort first by Source (e.g., Cash Register, Web orders, or Book Fairs). If Source is not selected as the Primary sort, or if you want to pick another category to sort on:



1. Click on the down-arrow button  to the right of the Primary Sort field to pick from a list of sorts.
2. The Secondary sort should be pre-set to Department. If not, or if you prefer a different sort, you can change the selection as described above.
3. Check the Total boxes next to each sort, so that we can see sub-total values on our report.
4. Click on the Save Settings checkbox in the lower right corner of the screen. This makes it easier to go back adjust our settings as we try to get a report just right.
5. To run the report, click on the Print button at the bottom of the screen.

The Print Report screen will appear. You can choose "Report to printer" to send the report to your attached printer, or "Report preview" to see what the report will look like without actually

a  
for



printing it. The Print Report screen also offers number of options exporting your reports, as we will see below. You



can choose “Report to printer” to send the report to your attached printer, or “Report preview” to see what the report will look like without actually printing it.

6. For now, let’s choose “Report preview”. Select that option, and click on the Print button.
7. A preview of the report will appear on screen. You can use the <Page Up> and <Page Dn> keys to navigate through the report. When you are finished viewing the report, click on the red X in the upper right corner of the preview window.

### Your Bookstore

Sales History Report										
For period beginning 1/1/2009 thru 1/30/2009										
Totals By Department, Section1										
Dept	Sect1	Media	SKU	Description	Units	Retail \$	Cost	Profit	Margin %	Mar
AUDIO	CMD	0553713272		Love Of My Own	1	29.95	29.95	0.00	0.00	
Totals for Section1:					1	29.95	29.95	0.00	0.00	
Totals for Department:Audio Books					1	29.95	29.95	0.00	0.00	
BOOK	HRD	0030646294		Biology : Visualizing	1	55.01	31.90	23.10	42.00	
BOOK	HRD	0030650364		United States :	1	19.60	11.36	8.23	42.00	
BOOK	HRD	0060012226		Geography Club : A	1	16.89	10.13	6.75	40.00	
BOOK	PAP	0060087730		Bit Cookbook : An	1	20.01	11.60	8.40	42.00	
BOOK	HRD	0130214973		Sybase Edm	1	59.00	35.40	23.60	40.00	
BOOK	HRD	0252024753		Soulstepping :	2	49.90	29.94	19.96	40.00	
BOOK	HRD	0375401202		Raising America :	3	82.50	49.50	33.00	40.00	
BOOK	PAP	0609808567		Mom, I Hate You :	1	6.99	0.00	6.99	100.00	
BOOK	PAP	0609810375		Official Price Guide	2	15.98	9.58	6.39	40.00	
BOOK	HRD	0631232761		Learning By Design :	1	55.01	33.00	22.00	40.00	
BOOK	HRD	0670031682		Carb Careful Diet :	3	60.03	36.01	24.01	40.00	
BOOK	HRD	0688168809		Watch Me Grow :	5	100.05	60.03	40.02	40.00	
BOOK	PAP	0764518305		Adobe Premiere 6.5	1	49.99	29.99	19.99	40.00	
BOOK	PAP	0810034628		Wall Street Journal	1	6.05	5.07	0.98	16.00	

You should be returned to the Print Report screen. Let’s explore some further possibilities:

1. Please choose the “Output to” option.

As you can see, you can send the report to a pdf file or an Excel spreadsheet, or even to a Anthology Purchase Order.



Most Anthology reports and documents will have a similar set of Print options.

2. Press **Esc** to return to the Sales History report screen

As you can see, the Sales History report is highly customizable: not only in terms of the data reported upon and the format of its presentation, but also what you can do with it.

### An Anthology reports sampler

The Sales History report is just one of the many customizable reports built right into Anthology. Here’s a sample of the other reports you can find on the Anthology Reports menu:

## A/R Sales Summary report

The A/R Sales Summary Report allows you to see those sales made on account to a customer:

**A/R sales summary**  
For period beginning 2/5/2003 thru 2/28/2003  
Totals By Customer Name, Title/Description

SKU	Description	Units	Retail \$	OH	OO
0064472299	Extra Innings	1	5.99	9	0
0060291613	Meow : Cat Stories From Around The World	1	20.01	9	0
0023150602	Personal Financial Planning : Your Guide To A	1	21.95	-1	0
Totals for Customer Name: <b>Adams Larry</b>		3	47.95		
1563708558	200 Best Jobs For College Graduates	1	16.95	9	0
Totals for Customer Name: <b>Maule Tom</b>		1	16.95		
<b>Total books sold:</b>		4	64.90		

## Customer Back Orders report

The Customer Back Orders report can report on one customer or all customers; on customer order back orders or special orders only, or both.

**Customer Back Orders**  
Date: 7/13/2009

Customer	Type	Tran #	Date	SKU	Title / Description	B/O	Deposit	OH	OO	ItemSttus	PO #	Vendor
Vance, Diane	SFO	5	6/28/2009	037540516X	Random House Chinese to English Dictionary	1	14.98	1	1	OnOrder	0000010	Baker &
Williams, SPO	SFO	6	6/29/2009	0743227409	Near a Thousand Tables : A History of Food	1	7.50	0	0	New		

## Daily Sales report

The Daily Sales report gives a quick snapshot of the day's sales. Sort by vendor, section, ISBN, etc.;

**Daily Sales Report**  
Totals By Publisher, ISBN/SKU  
Date: 1/11/2009

ISBN/SKU	Title/Descrip	Author	Pub	Sect Media	OH	OO	Day	Retail	CrrMnth	LstMnth	YR
6311612704	A Salsa Tribute To The Beatles	Various Artists	B & t		5	0	1	12.98	0	0	0
0345485793	Charlemagne Pursuit	Berry, Steve	Ballantine Books	FICT4 HRD	6	0	1	26.00	0	0	0
0345495004	Loving Frank : A Novel	Horan, Nancy	Ballantine Books	FICT4 PAP	3	0	1	14.00	0	0	0
0385340990	Guernsey Literary and Potato Peel	Shaffer, Mary	Bantam Dell	FICT4 HRD	3	0	1	22.00	0	0	0
038534239X	Going To See the Elephant	Fishburne,	Bantam Dell	FICT4 HRD	6	0	1	22.00	0	0	0
0385342586	Lima Nights	Arana, Marie	Bantam Dell	FICT4 HRD	6	0	1	25.00	0	0	0
0385526199	Blindspot	Kamensky, Jane	Bantam Dell	FICT4 HRD	6	0	1	24.95	0	0	0
0553806793	Face at the Window	Graves, Sarah	Bantam Dell	MYST2 HRD	6	0	1	22.00	0	0	0
0553807137	Your Heart Belongs to Me	Koontz, Dean R.	Bantam Dell	FICT4 HRD	6	0	1	27.00	0	0	0
0425224988	Defending Angels	Stanton, Mary	Berkeley Pub	MYST2 PAP	6	0	1	7.99	0	0	0

## Inventory Status report

The Inventory Status report can produce a wide variety of reports, including total value of inventory at both cost and retail; out of stock books, on order books; books received after a certain date, etc.

**Inventory Status Report**  
Totals By Section

SKU1	Description	Publisher Dept	Sect	Media	Author	OH	OO	List Price	Retail Price	Ext Retail
0811837122	Chicken Salad : 50 Favorite Recipes	Chronicle	BOOK	COOK2 HRD	Lauterbach, Barbara	5	0	18.95	18.95	94.75
0375400354	Gift of Southern Cooking : Recipes	Random	BOOK	COOK2 HRD	Lewis, Edna/ Peacock,	4	0	29.95	29.95	119.80
1580401368	Soul Food Selections : Quick &	McGraw-Hill	BOOK	COOK2 PAP	Weaver, Ronnie/	5	0	19.95	19.95	99.75
1580628389	Church Potluck Supper Cookbook :	Adams	BOOK	COOK2 HRD	Robinson, Elaine	5	0	15.95	15.95	79.75
1400054354	Barefoot Contessa Back to Basics :	Random	BOOK	COOK2 HRD	Garten, Ina	2	0	35.00	35.00	70.00
Totals for Section: COOK2						71	0			1870.75
0303894348	It Matters To Me		MUSIC	COUNT	CASM Hill, Faith	10	0	3.49	3.49	34.90
0303703046	Sixteen Tons		MUSIC	COUNT	CASM Ford, Tennessee Ernie	10	0	7.98	7.98	79.80
0300849481	I'm Movin On		MUSIC	COUNT	CASM Snow, Hank	10	0	7.98	7.98	79.80
0302295599	Jolly Mon		MUSIC	COUNT	CASM Buffet, Jimmy	10	0	20.98	20.98	209.80
0301654802	All Time Greats		MUSIC	COUNT	CASM Snow, Hank	10	0	9.98	9.98	99.80
Totals for Section: COUNT						50	0			504.10
1892514796	Nineties Crossword		BOOK	CROSS	PAP	4	0	12.00	12.00	48.00
1580635859	Big Book Of Tv Guide Crossword		BOOK	CROSS	PAP	5	0	9.95	9.95	49.75
Totals for Section: CROSS						9	0			97.75

### Purchase Order Status report

Report on draft POs, open POs, or completed POs. Report shows quantities and dollar values at both cost and retail.

Filter by vendor, department and PO status.

**PO Status Report**  
For period beginning 6/1/2009 thru 7/13/2009  
Totals By Vendor, PO #  
PO Status: Draft

Vendor	PO #	ShpmDate	Status	SKU1	SKU2	Title	Department	Pub Date	Qty Ord/UOM	Qty Rec	Outst	Unit Cost	Total Cost	Open Bal	Retail Price
Random	0000003	06/28/09	Draft	0312305125	6306152794	New York Times Daily	Book	05/11/03	10EA	0	10	9.95	99.50	99.50	9.95
Random	0000003	06/28/09	Draft	0399526229	6306152794	Charles Fraxton's Giant	Book	05/11/03	10EA	0	10	11.95	119.50	119.50	11.95
Random	0000003	06/28/09	Draft	0743232695	6306152794	Sim on And Schuster	Book	06/10/03	10EA	0	10	9.95	99.50	99.50	9.95
Random	0000003	06/28/09	Draft	0812934261	6306152794	Chicago Tribune Daily	Book	07/11/03	10EA	0	10	9.95	99.50	99.50	9.95
Random	0000003	06/28/09	Draft	081293427X	6306152794	Chicago Tribune Sunday	Book	07/11/03	10EA	0	10	9.95	99.50	99.50	9.95
Random	0000003	06/28/09	Draft	0812934601	6306152794	New York Magazine	Book	05/11/03	10EA	0	10	9.95	99.50	99.50	9.95
Random	0000003	06/28/09	Draft	0812934636	6306152794	Wall Street Journal Crossword	Book	05/11/03	10EA	0	10	9.95	99.50	99.50	9.95
Random	0000003	06/28/09	Draft	0812934652	6306152794	Dell Crossword Puzzles	Book	09/08/03	10EA	0	10	9.95	99.50	99.50	9.95
Random	0000003	06/28/09	Draft	0812934857	6306152794	Boston Globe Sunday	Book	09/08/03	10EA	0	10	9.95	99.50	99.50	9.95
Random	0000003	06/28/09	Draft	0812935047	6306152794	Stanley Newman's Literary	Book	08/11/03	10EA	0	10	8.95	89.50	89.50	8.95
Random	0000003	06/28/09	Draft	0812935063	6306152794	Dell Sunday Crossword	Book	08/11/03	10EA	0	10	9.95	99.50	99.50	9.95
Random	0000003	06/28/09	Draft	1596635859	6306152794	Big Book Of Tv Guide	Book	04/10/03	10EA	0	10	9.95	99.50	99.50	9.95
Random	0000003	06/28/09	Draft	1598180506	6306152794	Dog Lovers Crossword	Book	01/08/04	10EA	0	10	12.00	120.00	120.00	12.00
<b>Overstock Returns Report</b>															
For period beginning 6/1/2007 thru 7/13/2009															
Totals By RI#, Date															
													30	120.00	120.00
													30	120.00	120.00
													30	120.00	120.00

### Overstock Returns report

Track overstock returns; filter on draft returns, open returns (out to the vendor for approval), or completed returns. Reports show either summary or details, with units, value at cost, and value at retail.

**Overstock Returns Report**  
For period beginning 6/1/2007 thru 7/13/2009  
Totals By RI#, Date

Status	Date	RI #	Vendor	Qty	Sub-total	ISBN/SKU	Title/Describe	Dept	Sect	Media
Draft	7/13/2009	0000002	Baker & Taylor (Test Account)	10	185.00	1570901805	Hollywood Lip Prints : Lip	BOOK		PAP
Draft	7/13/2009	0000002	Baker & Taylor (Test Account)	10	265.00	1570901813	Hollywood Lip Prints : Lip	BOOK		HRD
Draft	7/13/2009	0000002	Baker & Taylor (Test Account)	5	4000.00	1571131035	Camden House History of	BOOK	LITE2	HRD
Draft	7/13/2009	0000002	Baker & Taylor (Test Account)	5	450.00	1571131736	German Literature OfThe	BOOK	LITE2	HRD
Draft	7/13/2009	0000002	Baker & Taylor (Test Account)	5	450.00	1571132368	Literature of German	BOOK	LITE2	HRD
Draft	7/13/2009	0000002	Baker & Taylor (Test Account)	5	425.00	1571132406	German Literature of the	BOOK	LITE2	HRD
Draft	7/13/2009	0000002	Baker & Taylor (Test Account)	5	450.00	1571132465	German Literature of the	BOOK	LITE2	HRD
Draft	7/13/2009	0000002	Baker & Taylor (Test Account)	5	550.00	1571132473	Early Modern Geman	BOOK	LITE2	HRD
Draft	7/13/2009	0000002	Baker & Taylor (Test Account)	5	450.00	157113249X	Literature of Weimar	BOOK	LITE2	HRD
<b>Total :</b>				55	7,225.00					

### Historical Ztapes report

The Historical Ztapes report allows you to reprint Ztapes for any day or any range of days; useful for sales tax reporting, credit card tenders reporting, and research.

### Receiving History / Co-op report

The Receiving History / Co-op report can be used to report on totals received from any given vendor; it also can be used to generate direct and indirect totals for any given publisher (i.e., totals of a given publisher's books purchase directly from the publisher and indirectly through distributors); these numbers will show the size of the co-op pool for the publisher

Sort

Primary      Secondary

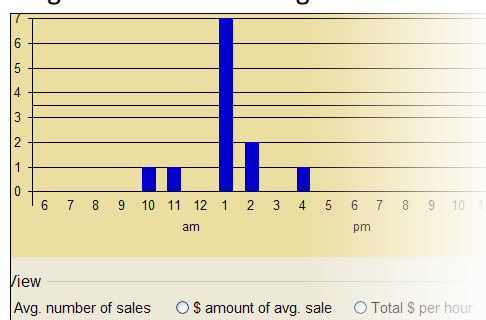
Vendor      None

Total       Total

Print Direct / Indirect totals

### Hourly Sales Graph

The Hourly Sales Graph report shows averages in terms of average number of sales, average amount of sale, and total dollars per hour for any specified range of dates. Very useful for planning staffing.



## Comparative Sales History report

The Comparative Sales History report makes possible the comparison of year-over-year comparisons of a given department, section, or media type

<b>Department: Music/Recordings</b>		
Wednesday, October 01, 2008 - Friday, October 31, 2008		\$0.00
Monday, October 01, 2007 - Wednesday, October 31, 2007		\$140.84
<b>Totals for Department: Music/Recordings</b>	<b>TOTAL:</b>	<b>\$140.84</b>
	<b>CHANGE:</b>	<b>\$-140.84</b>
	<b>PERCENT CHANGE:</b>	<b>-100.00%</b>

Totals for Section:

## Business Center

The Business Center provides a central focal point for tracking every aspect of your business: inventory levels, sales, receiving, and more

Business Center				
Overview		Sales/Inventory		
Inventory				
	# of items	@Cost	@Retail	
OnHand	14245	252349.94	383218.70	
Onhold	67	1189.16	1542.32	
OnOrder	21	556.57	423.55	
Purchase Orders				
	# of POs	# of line items	# of units	@Co
Draft	3	154	380	536
Open	2	6	21	24
Receiving				
	# of Shipments			
Today	0			
Yesterday	0			
This Wk (05/24/09 - 05/30/09)	0			
Lst Wk (05/17/09 - 05/23/09)	0			
This Mo (05/09)	0			
Lst Mo (04/09)	0			
13 months ago (05/08)	0			

And dozens of other reports, including Daily Sales, Inventory Levels, Used Books, Sales and Returns, Gift Cards, New Books, On Order, Sales and Receiving Analysis, and Book Fairs.


## Creating your own reports with queries

Anthology has a wide variety of reports, able to provide information on every aspect of your business. It also provides tools to let you create your own reports, and to create data sets that you can work with in a variety of ways: Queries.

To see how Queries work, please take the following steps:

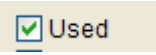
1. Close any Anthology screens you may have open.
2. Go to the Master Files menu and choose Inventory.
3. From the bottom of the Actions menu, choose Construct a Query.



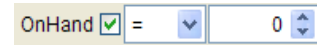
You can also open the Inventory screen by clicking on the books icon  on the toolbar.

The Query screen will open. On the Query screen, you can define the conditions that define the set of records you want to work with. Let’s create a simple query that will show us all our used books currently in stock.

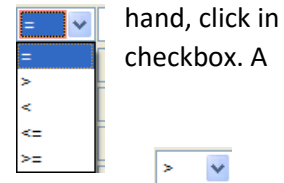
1. Click in the “Used” checkbox in the lower part of the screen to select it.



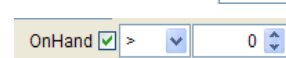
2. Click in the “On Hand” checkbox in the upper right.



3. Since we want to see only those titles we actually have on the operator control just to the right of the OnHand display of operators will drop down.



4. Choose the “more than” symbol second from the top:



The OnHand control should now look like this.

5. Click on the **F12 Run** button at the bottom of the Query screen.
6. You will be asked if you want to name and save the query. Since this is a query we will often want to use, answer Yes.
7. The Save Query screen will allow you assign a name to this query to make it easy to find and run again in the future. Let’s call this “Used books on hand”. Click on **OK**.

At this point, we are returned to the Inventory List page, with only those items that met the conditions of our query showing. Note that the title bar of the Inventory screen shows us that a query is in force.

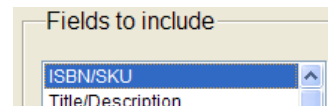
Inventory (Query applied: Used books on hand)




Note that we can work with these records just as we ordinarily can work with records on the Inventory List page. For example, we can select “Flag for Update on Web” from the Actions menu. We can Reassign Department, Section, and other values for one or all of these records (for more on Reassign, please see below in the Anthology Toolbox section). With a different selection of records, we could send them to a PO or to a return memo, or even delete the records. More than a simple printed report, Query gives you a set of live records to use in any of many ways.

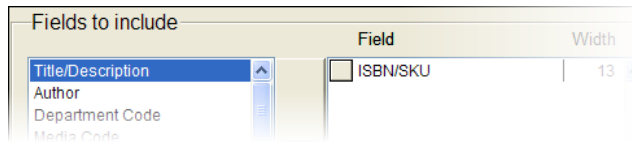
Of course, we can print a report about this selection as well. To see some of our options here, please take the following steps:

1. Choose **F11 Print**.
2. The Report Format screen will appear, allowing us to define how our report should look.
3. We can begin by defining the fields we would like to see on our report. In the “Fields to include” section of the screen, locate and click on “ISBN/SKU”.
4. Now click once on the right-pointing arrow-head



button between the two windows. 


“ISBN/SKU” will be moved from left window to the right.




the

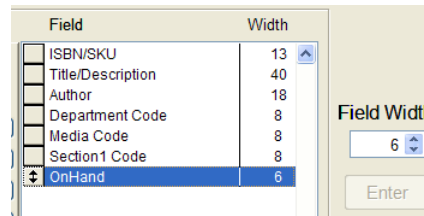
5. Back in the “Fields to include” window, and click on “Title/Description”.

locate

6. Click on the arrow control  once more. “Title/Description” will be moved to the right window.

7. In the same way, select Author, Department Code, Media Code, and Section1 Code, and any other fields you might like to see. Finally, double-click on “On Hand” to select it as well.

 Sometimes you will want to shorten a field’s default width so that all your selected fields will fit on a single line in a report. You can do so using the Field Width control to the right of the screen.



8. Click **F11 Print**.
9. You will be given the option to name and save the format. If we give it the same name as our query, “Used books on hand”, then the next time we run the query the report format will be automatically selected. Click **OK**.

The Print dialog will come up, allowing us to either send the report to the printer, to preview the report, or to send the report to a file in any of several formats.

As you can see, Query is a powerful tool for creating your own custom reports and exports, as well as for working with sets of records you define. In addition to the Inventory Query, there are also Construct a Query options available on the Actions menu for the Customers and Vendors master file screens.

10. When you are done experimenting with Query, keep pressing **Esc** to return to the main menu.

## Optional modules

### Used books

Used books are becoming more and more important for booksellers. Even stores that primarily sell new books are finding that adding used books to their inventory can improve their sales and their margins.

Anthology's optional used book module provides a suite of powerful tools for booksellers. With the used book module, you can:

- Get real-time information about sales history, online pricing, and availability, enabling you to make the best decisions about buying used books
- Track and price each individual copy of a given title as a "serialized" record. See on hand and sales information for all serialized records sharing the same ISBN.
- Track customer requests ("wants"), and receive notification about potentials wants when you consider whether or not to buy a title
- Upload some or all of your used books to online marketplaces like Amazon or Alibris, or to services like Fillz
- Issue, track and accept as payments trade credits

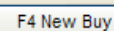
### Buying books

Making good decisions about which books to buy and what to pay for them is crucial. Anthology gives you key information about the books you are considering, including:

- Onhand and sales information about any copies of a given title that you currently own or have owned, including sell-through dates
- Real-time information about current pricing, availability, and sales rank from Amazon.com, the largest online marketplace for used books (requires Amazon sellers' account)
- Information about outstanding customer requests for the book you are considering


To see how the Anthology Book Buyer screen works, we will want to begin by doing some simple setup.

1. After first closing any other windows within Anthology that you might have open, go to the Tools menu and choose Options.
2. Select the tab labelled "Used Books / Remainders".
3. Enter values into "Cash buy price as a percentage of list" and "Credit buy price as a percentage of list" (for example, 20.00 and 30.00). These can help serve as starting points for calculating the price you want to pay for a given Buy.
4. Click on **F10 Save**. A message will appear suggesting that you restart Anthology to see your changes. In this case, a restart is not necessary.
5. Exit the Options screen.
6. Click on the Sales menu, and then choose Buy Books
7. Click on the button labeled F4 New Buy. The Buy Books screen is ready to enter books with the focus on the ISBN/SKU field.



- Before we begin, please make sure that "Get web prices" is checked in the lower part of the screen. If not, please check and check "Save Settings" while you are at it.

Note that there is a Customer field at the top of the screen. If your business model involves giving and tracking trade credits for customers, you would want to specify the customer here. If not, please skip to Step X below.

Customer: JEAN, AMANDA 

- To assign a customer, click on the Assistant button to the right of the Customer field and select Amanda Jean from the list that appears.
- The cursor will move to the Note field. Press Enter one time to move to the ISBN/SKU field..



Remember, entering an ISBN and pressing **Enter** in this way mimics the same behavior you would see if you scanned this book's bar code.

- If the coral focus color is not in the ISBN/SKU field, please put it there by clicking with your mouse. Key in **0316043133** and press **Enter**

The Quick Inventory Add screen will appear, showing the serialized SKU that will be assigned to this copy should you decide to buy it.

- Choose Save. There will be a brief pause while information is gathered from the web on the ISBN you just entered.



If you do not want or need this information, simply uncheck the "Get web prices" checkbox

Let's take a moment to review the information we have at this point.

At bottom of the screen is tabbed display known in Anthology as the InfoPanel. The InfoPanel displays a variety of useful information about the current line item; there are InfoPanels for purchasing, receiving, overstock returns and many other screens.

At the far right of the current, Inventory page of the InfoPanel, you should see information about offers of used copies of this title on Amazon. Because the data is gathered in real-time, your display may differ from the one shown here, but will include:

- The lowest price at which the title is currently offered on Amazon
- The "Avg Low Price" -- really not an average, but the mean of the 10 lowest Amazon prices (using the mean instead of a true average prevents skewing by outliers like copies offered for \$0.01 or \$100).
- The highest price offered
- The Amazon sales rank

Low Price	6.96
Avg Low Price	10.00
High Price	11.21
Sales Rank	564

You may want more detail about one or more of these offers. To see that, simply click on the



ellipsis button located the right of the Memo field.



Scrolling the window above the Amazon logo and disclaimer will let you see all of the details of all of the offers for this book.



If you want even more detail, you can click on the link below the scrolling window to be taken to the main page on Amazon for this title.

Full information: <http://www.amazon.com/Twilight-Complete-Illustrated-Movie-Companion/dp/0316043133%3FSubscriptionId%3D14YVVS6V931FCRYKBTR2%26tag%3Dws%26linkCode%3Dsn1%26camp%3D2025%26cr>

The same link is also available to the right of the ellipsis button on the InfoPanel page.

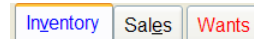
- When you are done reviewing the information on the Amazon Info window, just click the Cancel button

Reading to the left of the display of Amazon information, you will see a spreadsheet-style display (a "grid") showing information about all the used copies of this title that have already acquired, including their buy date, prices, sold date, and the number of they took to sell.

SKU1	Buy date	Buy price	Retail	Sold date	Sell thru
0316043133-01	3/17/2009	4.25	8.50	3/27/2009	10
0316043133-02	3/17/2009	4.25	8.00	3/25/2009	8
0316043133-03	3/17/2009	4.25	7.70	4/17/2009	31

you  
days

Finally, at the very left of the InfoPanel you can see a tab labeled Wants. The fact that the Wants text is highlighted in red is your cue that you have recorded a request by a customer to be notified if and when you acquire a copy of this book.



The Wants screen is maintained on the Master Files menu.

- Click on the Wants tab. You will see a listing for our customer Larry Adams, who said on 3/17/09 that he was interested in the title.

Want #	Date	Customer	ISBN/SKU	Title/Descrip
000002	3/17/2009	Adams, Larry	0316043133	Twilight : The Complete Illustrated Movie Companion

By this time we may have decided to buy this book, since it's both popular and wanted by one of our customers. We need to decide how much we want to pay for this book and, optionally, how much we plan to sell it for

The program suggests a Buy price as well as a Retail price to sell it at, depending on the percent values defined in the Used Books section of the Options screen. Of course, you can adjust the buy and sell prices at the time of purchase. To do so, please take the following steps:


- Click in the Buy Price field one time.
- Now you can enter a new price. To make it \$3.00, simply type 300 (no decimal needed) and press Enter

3. The Enter Line button now should have the dotted highlight. Press **Enter** once more to add the line

To conclude the transaction, please take the following steps:

1. Click on the F3 Payment button on the bottom of the screen or just press **F3**.

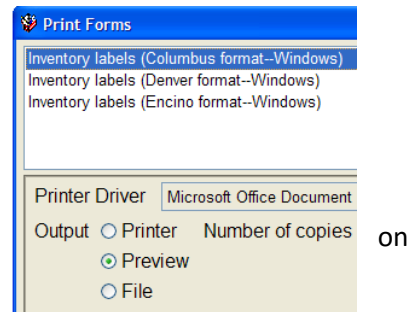
A list of the pay types as defined in your Tenders screen will appear. Let's issue a trade credit to pay for this buy.

 When a customer has been identified for a buy and a trade credit is issued, Anthology will increment that customer's trade credit balance. When they next make a purchase, the trade credit can be applied as payment according to rules you define.

2. Choose Trade Credit  Max trade credit as percentage of sale total  from the list of tenders, either by clicking in the checkbox next to "Trade Credit" or by typing the number 8.
3. Press **Enter** to confirm the amount, and then **Enter** twice more.
4. You will be given the opportunity to edit the transaction or to post (i.e., to complete) it. Press **Enter** to choose Post.

A receipt for the transaction will print, and then you will be given the opportunity to print labels for the books you have purchased.

If you choose to print labels, you will be given the choice of several pre-defined formats. If you would like to view these labels without actually printing them, simply choose Preview the print dialog.



### Serialized records

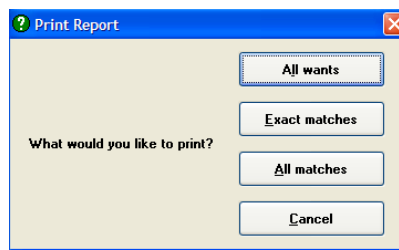
With the optional used books module, you can track multiple copies of the same ISBN, assigning each its own price and tracking its buy and sales history. The Copies page on the Inventory screen provides you with a convenient overview.

List	Details	UOMs / Prices	Sales	POs	Returns	CBOs	BFs	Copies
ISBN / SKU	Item / UPC	Title / Description						OH
0316043133		Twilight : The Complete Illustrated Movie Companion						1
0316043133-01	0316043133	Twilight : The Complete Illustrated Movie Companion						0
0316043133-02	0316043133	Twilight : The Complete Illustrated Movie Companion						1
0316043133-03	0316043133	Twilight : The Complete Illustrated Movie Companion						1
0316043133-04	0316043133	Twilight : The Complete Illustrated Movie Companion						1
0316043133-05	0316043133	Twilight : The Complete Illustrated Movie Companion						1
0316043133-06	0316043133	Twilight : The Complete Illustrated Movie Companion						1

The Wants screen on the Master Files menu allows you to identify and track items that your customers have expressed in interest in purchasing.

### Wants

Want #	ISBN	Title	Author	Qty	Last name	First name	Note	Status
000002	0316043133	Twilight : The Complete Illustrated Movie Companion	Vaz, Mark Cotta	1	Adams	Larry		
000004	0743227409	Near a Thousand Tables : A History of Food	Fernandez-armesto, Felipe	1	Brown	Sue		



When you buy a copy of a wanted title you will be notified; you can also print reports of all recently acquired books that match wants requests from your customers.

## Uploading items for sale on the internet

Anthology allows you to upload your inventory to popular 3rd-party sites like Amazon, ABE, Fillz, or any other site that uses the standard UIEE or tab-delimited formats. You can control which inventory items get uploaded at the level of department, section, or individual inventory items; and you can choose to upload all eligible items or only those which have changed their on hand status since the last upload.

## Trade credits

Many used book sellers offer their customers the option of trade credits rather than cash when buying merchandise. Trade credits are good for your cash flow and good for repeat business.

In Anthology, trade credits can be used as a payment type at the conclusion of a buy. The amount of trade credit that each customer is entitled to is tracked on the Customers screen on

List	Details	Sales	Inv Detail	Buyer Clubs	Credit Card	Trade Credit
	Date	Type	Amount	User	TransNo	Comment
	6/12/2009 11:26:10 AM	Earned	4.25		101958	
	7/12/2009 11:32:25 AM	Earned	3.39		101962	
	7/12/2009 11:42:47 AM	Used	-2.69		101966	

the Master Files menu. You can control how much trade credit can be used on any given purchase, and the program will show you how much trade credit

is eligible for any given customer at the time of check out. Trade credits can be given special sales tax treatment if your state's laws allow this.

## Using the training data for my store

### Overview

During this training session we have been using a fully functional copy of Anthology and a sampling of data that is typical for most independent bookstores. Using this data in your "live" installation would have many benefits –

- It can greatly decrease the time needed to configure Anthology for use.
- You are already familiar with data from the training you have just completed.

- Training new staff with a copy of data that matches your own is invaluable.

Let's take a look at what we would need to change in order to use this data.

## Options

In the options screen "Tools | Options" there are several tabbed pages with a lot of choices. Many of these may not apply to your situation. Let's walk through the tabs and make some modifications.

### General

There are a couple of things here that might be changed:

- The "Default Customer Search" section. Choose the option that best suits your business.
- Run Quick Backup after Ztape. We recommend that this be set to "Always" – it is purposely turned off for training.
- Run Scheduler after Ztape. We recommend this be checked.
- Populate Item with ISBN/SKU. We recommend this be checked.

### Addresses

You should modify all three sub tabs with your store's information.

### Cash Register

There are few items of interest here

- Receipt message. You may modify this to something more to your liking.
- If you'll be using a Frequent Buyers Club you may want to check "Credit gift cards and gift certificates to purchaser" this way your customers will get the credit on the FBC.
- You should look at the Special Order section. We recommend you review this in your Anthology help system for a full description of each option.

### CO's

This is pretty much the standard setup and most people don't change anything except to set the Customer Service Contact to (None).

### PO's

This is also pretty standard.

### Accounting

There is nothing to change here. This screen is used if you are purchasing the AR/AP accounting links.

### WebStore

This product is no longer available – this tab will be removed at point.

### Credit Cards

Your implementation technician will address this screen with you.

### UDF

This does not require any immediate action. You may enter label values to any or none of these fields.

### External Data

This is where you credentials for the different vendors you work with will be entered. You may not know any of these values at this time but will need to at least be familiar with where to enter them as you get them.

### Used Books / Remainders

If you did not purchase the Used Book module then this page needs no attention. However, if you did, you should review this section in the Help system for a full explanation of each option.

### Email

This is a very handy option to set up. If you have Outlook setup on your server simply check this option. If not you'll need to modify this information to include yours.

That's if for this section – remember you revisit this any time. The Anthology “Help on the web” – Setup and Configuration section has a full explanation of these options.

## Master Files

Now let's move to the Master Files menu. Here you'll find a number of sub-menus that you'll use as you add and edit data. Only a few require your attention today.

### Departments

In the departments screen we included a standard set of BISAC department names. You may keep these, change their name, or delete them altogether. You can add new as well.

### Sections

The same applies to sections. We have included many “typical” section names that may use all or part of.

### Media

We've included a list of media choices – again you may use all, part or none.

### Taxes (tables and profiles)

This is one that will most likely need to be changed. We recommend you read the section in the help system and make the necessary changes. Again, if your store uses a single tax then all that is necessary is that you change the tax rate in the “Tax Table” screen to match your states tax laws. A full description of this is available in the help system.

### Tenders

This is a standard list of tenders but your location may require additional options. If these tender options will meet your needs then there is nothing to change. You may add or remove them at any time.

## Vendors

This section is mainly about Electronic Ordering. When setting up the vendors you want to order from there are only a few steps left for you to do. We have filled in the data for you and you only need to change the account numbers to make them work. Naturally you'll need these numbers and will be contacting these vendors to get them.

## Frequent Buyers Clubs

You may use or edit the one we have created, which is fairly typical, or create a new one using this as an example.

## Final Steps

This completes the basic set up of your Anthology software. Your implementation technician will move this over to the new server or stand-alone computer and run a special utility that will reset such data as Purchase Order, Sales, Inventory, etc. only the data we've modified here will remain.