Bookmanager
Always thinking.

CHOOSE YOUR OWN ONLINE ORDER ADVENTURE

YAY! A new online order arrives!

Press Lock to change the lock on a order to Unlock or Mine

Are the titles on this order...

All items are **IN STOCK**
(this would include: Click & Collect orders)

Print --> L) Picklist
We like to print this as a receipt as it clearly shows the customer name at the top, shows if it is pickup/ship as well as a barcode to quickly jump to this sale after the fact.

Log --> Picking

Once the items are picked
How did they want to pay?

Pay at Pickup

Print --> Notice via email or text

File the books on your hold shelf, using the Picklist as bookmark to log customer info etc. You may wish to Log any future correspondence with the customer, and any reminders.

When the customer comes to PICK UP their order...

Scan the barcode on the held receipt to bring up the held, or search by the customers phone number/name. Edit the Held and tender it with the payment they provide

Pay by Credit Card

When viewing the Held, press Xtra to clone the transaction. This will copy the PO, notes, payment method etc. into a new transaction, to keep the payment and the original order linked.

PgDn to the tendering screen and do a **PmtOnAcct** of the amount to the payment method they provided.

Newer version of Bookmanager will move the note that shows the amount and payment type to the right of the tendering popup for you to quickly reference.

Press Kard once highlighted on the payment type (i.e. Pinpad, VISA, MC, Square) so you can see the credit card information. Complete the sale by manually typing the card into your payment device/app.

Did the payment method approve?

Yes :)

You may decided to email your customer a receipt of this payment. You can do so on the tender print menu by choosing Receipt --> Email

No :(

Darn! Let's Log that (Log --> f) PmntNeeded) and then reach out to the customer for an alternative method

let's try that again... did it approve now?

Pay by PayPal

As long as you have the option enabled, the Paypal payment will automatically post to the customer account as a credit waiting for you to use as their order completes.

This order will be...

Picked up

File the books on your hold shelf, using the Picklist/special order slips as a bookmark to log customer info etc. You may wish to Log any future correspondence with the customer, and any reminders.

The customer arrives!

Scan the barcode on the Picklist to bring up the held, or search by the customers phone number/name. Tender the transaction as a **CreditRdm** against the original payment made on account by credit card or Paypal.

Shipped

Scan the barcode on the picklist to bring up the held, or search by the customers phone number/name. Tender the transaction as a **CreditRdm** against the original payment made on account by credit card or Paypal.

Pack up the box and complete the shipping portion with the carrier of your choice. You can then Log --> S) Shipped - Completed.

You made it!
You completed the online order!
HIGH FIVE!!!

Items are a mix of IN STOCK and OUT OF STOCK at the store

First, let's take care of the in stock items...

Print --> L) Picklist
We like to print this as a receipt as it clearly shows the customer name at the top, shows if it is pickup/ship as well as a barcode to quickly jump to this sale after the fact.

Log --> Picking
Now go around and pick the items in stock

File the books on your hold shelf, using the Picklist as bookmark to show customer contact info etc. You may wish to Log any future correspondence with the customer.

Now, let's put those out of stock items on order...

Pay at Pickup

Keep the online order as a held and wait for the books to arrive.

Yay! Books start arriving... what's next?

As the books arrive, the BO status on the special ordered items will update to show in-stock and ready to sell. This will happen automatically through the exit receiving menu "***Add S/Os to POS***"

The **Log** will also update as each item is received letting you know how many more items you are still waiting to arrive (if applicable).

As each item arrives.... Print --> Notice via email or text to let the customer know what items are ready for pickup.

Customers may ask to pickup items as they arrive. In these cases, Edit the original held and Transfer the items that are ready into a new held. This held can then be Edited and tendered as each item is picked up.

File the books on your hold shelf, using the Picklist as bookmark to log customer info etc. You may wish to Log any future correspondence with the customer, and any reminders.

The customer arrives!

Scan the barcode to bring up the held, or search by the customers phone number/name. Edit the Held and tender it with the payment they provide.

All items are OUT OF STOCK at the store

Tab or Edit the online order. You may have to merge the customer with an existing account, follow the prompt that come up to do so. Once you are back at the online order transaction, press **PgDn** to get into the lines of the invoice. On each line that has a red **qty** next to a **b** (to note this is a backorder,) press Reserve to put each item on order. Follow the prompts to put the item on order with the supplier of your choosing. Work your way through the invoice until all items that are BO'd have a blue **qty** next to the b.

**** If there were any titles that were showing as in stock that you couldn't find when picking the titles (if applicable), you can also put them on order in this step. ****

Press **ESC** to Hold the transaction

Print --> Notice via email to confirm order has been received and dealt with.

Log --> i) **MoreToCome** to note that the order is not complete and you are waiting for the titles to arrive. You can also add a little note to the log if anything requires extra explanation.

Now that the items are picked/ordered
How did they note they want to pay?

Pay by Credit Card

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Shipped

File the books on your shipping hold shelf, using the Picklist/special order slips as a bookmark to log customer info etc. You may wish to Log any future correspondence with the customer, and any reminders.

Yay! All the books have now arrived and the order is ready to ship...

Scan the barcode on the picklist to bring up the held, or search by the customers phone number/name. Tender the transaction as a **CreditRdm** against the original payment made on account by credit card or Paypal.

Pack up the box and complete the shipping portion with the carrier of your choice. You can then Log --> S) Shipped - Completed.