

ONLINE ORDERS

If you have a consumer enabled WebStore, orders placed online can be transferred instantly to your POS as a special Held sale. The WebStore aspect of an online order will be discussed in a separate document focusing on the WebStore, so for the purposes of this manual, only the BookManager software end of things will be outlined.

Before working with **NewOnline** orders, you will need to specify a few setup options. From **Setup**, select **v) WebStore**.

```
Webstore Setup
Enable communications with your Webstore at bookmanager.com? Y
Set the Connection ID for this computer's webstore (browser)? N
Include Pending Order qtys for webstore stock availability? Y
Online orders will be filled based on AvailOH (Yes/No/Always)? Y
Online prices will use customer's discount stored in BookManager? Y
```

You must have the first option **Enable communications with your Webstore at bookmanager.com?** set to **Yes**. The other options are personal preferences, but the settings above are our recommendations. Finally, under your **WebStore Settings** on the actual WebStore, you must enable an **Ordering** option called **Submitted orders will automatically generate a Held Sale in my BookManager system** in order to most effectively manage these transactions.

NewOnline orders will appear in your BookManager software as soon as they are placed online. Keep watch for new orders either in your email inbox, or by looking for **Online:X** (where the **X** is how many new Online orders you have) in the upper right hand corner of your BookManager software.

```
Mosaic Books F3:1-NotSent Online:2 w0
BookManager v10.3.160502 Wed May 4 2016 10:48a #16
Main options Orders are up for <R>evue Tools
```

To access NewOnline orders, go to **4 POS**, select **Search**, and under **Section**, enter **O** for Online, and press **Enter** on the blank **Filter** field. All new online orders will be listed, so select one and press **Enter** to view it.

```
Mosaic Books F3:1-NotSent Online:2 w0
4) Point-of-Sale Wed May 4 2016 10:48a #16
Browsing POS
Type-Inv# Date Cust Title ISBN Price-%
Onli H57943 May 4-16 Neill, Trevor Apathy and Other S 9780312352196 B 20.99
Onli H57943 May 4-16 Neill, Trevor Tuesday Nights in 9781501121043 32.00 20
Onli H57944 May 4-16 Neill, Trevor Highly Illogical B 9780525428183 23.99
```

There are three unique online order scenarios:

THE ONLINE ORDER IS FOR ITEMS YOU HAVE IN-STOCK

In this case, you don't even need to **Edit** the NewOnline order. Simply select **Print**, and type **L** for **Picklist** and press **PgDn** to send an itemized list of the order to your main printer. Use this printout

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to find the requested books, and tuck the printout in one of the books once all are found, as the printout also includes the customer's name and account number at the top. You can also view a Picklist on your mobile device (tablet, phone, etc.) if that is more convenient. Select **L** for **Picklist**, but instead of selecting **M** for your **Main Printer** as the destination, select **W** for **WebStore**, and **[PgDn]**. You will then be asked to select from a list which device you want to view the Picklist on. If you have not yet set up a **Connection ID** for your mobile device to communicate with BookManager and your WebStore, please refer to the WebStore manual or call BookManager support.

Set the books aside in your appropriate customer holds area, and head back to your BookManager software. The NewOnline order should still be up on your screen, and if not, you can easily **S**earch for it again. With the order up, select **P**rint again, but this time type **N** for **notice**. This will send an **order confirmation** back to you customer. If nothing on the order was out of the ordinary or needed clarification, press **[PgDn]** to send the confirmation. You can **[↓]** to the third **Print/Finalize Transaction** field and input an **E** for **Edit, Send & Save** if you would like to modify the default email notification before being sent.

NOTE: As soon as the customer places an online order, they will receive an emailed initial order confirmation. This initial confirmation is just there to explain that you have received the order, and will respond back once the order has been finalized or shipped. This is why it is necessary to send a second order confirmation once you are certain you can fulfill their order.

The last step is to mark the NewOnline order as done by pressing **L**ock. The **NewOnline** in red should disappear and all you will be left with is a standard Held transaction.

THE ONLINE ORDER IS FOR ITEMS YOU NEED TO ORDER (NOT IN-STOCK)

All the items in this order will have a **b** for **backorder** following the quantity wanted for each item. For example, **3b** means that the customer wants three copies of the item, but they need to be ordered.

Mosaic Books Online: 1 w0
4) Point-of-Sale Wed May 4 2016 11:53a #16

To	Neill, Trevor	Act	80596	Via	Pickup	Gp	00	cl	@
				Terms		Date	May	4-16	
				Items		Time	11:53am		
				Sub	0.00	Inv#	H57960		
						Stat	Held		
							NewOnline		
							Points		
							ThisSale	0	
							CurrTotal	40	
				Total	0.00				

PO# OL742626
OL742626

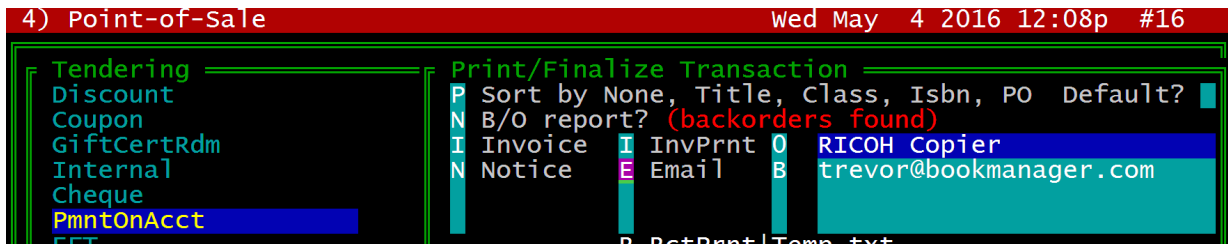
O/H	Clas	Title	CustPO	ISBN	Qty	Price	%	T	Pt	Total
	FICT	Dirk Gently's Ho	OL742626	9781447221098	3b	18.99		1	BOS	56.97

In this case, there is nothing to print right off the bat, as there is nothing to pick from your shelves. Instead, select **E**dit to get into the order. From here, highlight the item(s) needing to be ordered, and press **R**eserve. Type the number of copies requested by the customer (3 in the above example), and **[↓]** to the **Supl** field to input which source you are ordering from. Make sure to select the Supplier that results in the **Sell** price your customer was quoted on this order. You can also leave a note in the notes field if need be (such as "X-mas present, do not call!"). Press **[PgDn]** to save the order and

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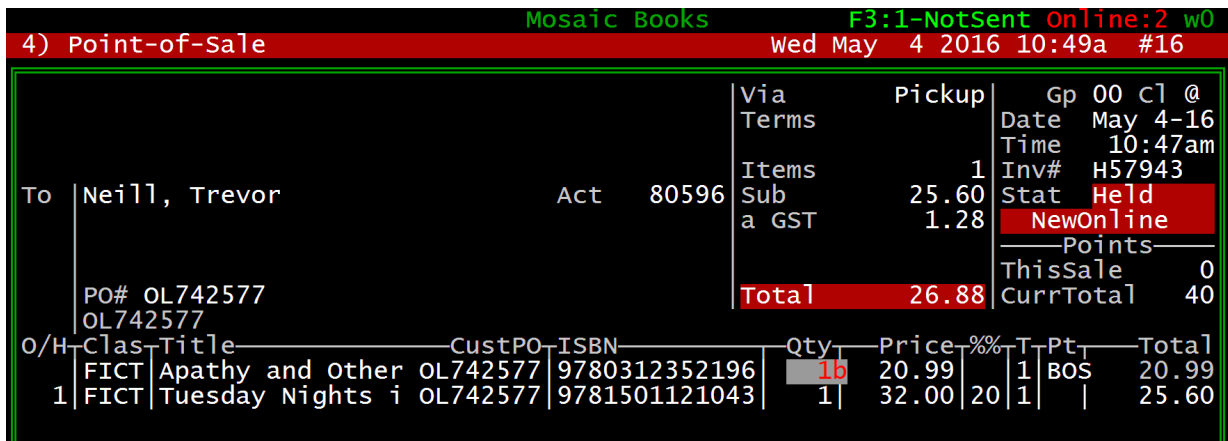
jump back to Point-of-Sale, where you can continue with this **R**eserve process for the remaining items needing to be ordered. Notice that the red **b** quantities will change to the standard green text once dealt with. **P**rice will appear in red if the order or stock **S**ell price is different from what the customer was quoted. This usually means you need to have a look at the order **S**ell price again to make sure you got the details correct.

Once all items are on-order, the order prices need to be locked in for Receiving, and the customer sent an order confirmation. Press **Enter** until you are at the **Tendering** screen. Here, select **OnAcct** or **Cash** and press **PgDn** (the amount should be zero dollars, and the tendering method is moot, as no payment is being taken). This will bring up the **Print/Finalize Transaction** box. Type **i** for **Invoice**, and **↓** twice and enter **0** for the number of copies to print. This step locks in the ordered prices, so the customer pays what they were quoted on your WebStore. On the next line below this Invoice line, enter an **N** for **Notice**, and **PgDn** to send an email to the customer notifying them that their items have been ordered. The **NewOnline** status will be cleared.



THE ONLINE ORDER IS A MIX OF IN-STOCK AND ITEMS TO BE ORDERED

In this situation, the above processes stay almost the same, with a few nuances at the end to separate the order.



First, deal with the items that need to be ordered. **E**dit into the NewOnline order, **R**eserve the back-ordered items, then **Esc** and choose **Hold transaction**. Now **P**rint a **L** Picklist so you can find the items in-stock. Once you have pulled (and confirmed) the in-stock items, head back to BookManager and select **P**rint again and send the customer a **N** Notice. BookManager will format the notice in a way that shows which items are ready for pickup (in-stock) and those that need to be ordered. [see screenshot]

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From orders@mosaicbooks.ca ✨ Reply Forward Archive Junk Delete More ▾

Subject **Mosaic Books: Ref#H57943** 10:51 AM

To Trevor Neill ✨

Dear Trevor Neill
Customer#80596

Thank you for ordering with Mosaic Books.
This is a status report for the items we have under Ref#H57943

** OL742577 **

The following are ready for pickup or delivery.

ISBN	Qty	Description	Price %	Net	Total	PO#
9781501121043	1	Tuesday Nights in 1980 Prentiss, Molly	32.00 20	25.60	25.60	OL742577 a

The following are being ordered specifically for you and are expected to be in stock shortly. Please advise us immediately if anything appears incorrect. Prices may vary unless we have given you a firm quote. We will notify you again as soon as stock arrives.

ISBN	Qty	Description	Price %	Status	PO#
9780312352196	1	Apathy and Other Small Neilan, Paul	20.99	On Order	OL742577 a
1 items billed			32.00		25.60 SubTotal
Tax# 115387854 a GST			5%		1.28
					26.88 Total*****

Please contact us if you have any questions.
Thank you for your business!

Mosaic Books
411 Bernard Avenue
Kelowna BC V1Y 6N8

Phone: 250-763-4418 Toll free: 1-800-663-1225
Fax : 250-763-5211
Email: mosaic@bookmanager.com
Web : www.mosaicbooks.ca (4 million titles online)

Store Hours:
Mon-Wed: 9:00am - 6:00pm
Thu-Fri: 9:00am - 6:00pm (in winter and until 9pm on Thursdays and Fridays for summer and fall)

With the items picked and ordered, the final step is to separate the Online order into items that have been ordered and those that are in-stock and ready for pick up. To do this, select **E**dit to once again get back into the order. One by one, highlight the items that are in-stock, and press **T**ransfer. For the first item, select **{create new invoice}** and press (Enter↵). For all subsequent in-stock items, press **T**ransfer and press (Enter↵) to group them all on the same, newly created held invoice. Once this is done and all in-stock items are transferred, you should only be left with items that have been ordered. (PgDn) to **Tendering** and (PgUp) on **Cash** or **OnAcct** (\$0.00) to finalize the transaction, lock in the ordered prices, and clear the **NewOnline** status of the order.

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Example of the first confirmation email a customer immediately receives when they place an online order:

From Mosaic Books <noreply@bookmanager.com> ☆

Subject **Your order #742577 at Mosaic Books has been received.** 10:47 AM

Reply to Mosaic Books <orders@mosaicbooks.ca> ☆

To Trevor Neill ☆



Hi, Trevor Neill, thank you for your online order.

We will contact you during normal business hours to confirm availability, final pricing, taxes or shipping charges (if applicable.) We can be reached by phone at 250-763-4418 or by email at orders@mosaicbooks.ca should you have any questions or concerns.

Title	ISBN	Qty	Price	Disc	Total Price
Apathy and Other Small Victories <i>(special order - about 4 days to obtain)</i>	9780312352196	1	20.99		20.99
Tuesday Nights in 1980 <i>(will reserve - in stock)</i>	9781501121043	1	32.00	20%	25.60

Order total (2 titles, 2 items.)
Subtotal: 46.59
Taxes: 2.33
Total: CAD \$48.92

Total discount savings: 6.40

Reference #: **742577**
May 4 2016 10:47 AM

Instructions to Mosaic Books
Delivery option: **Pick up at store**
Payment choice: **Pay at pick up**

Customer Details
u141435
Neill, Trevor
250-448-1427
trevor@bookmanager.com

REQUEST A QUOTE (WEBSTORE FEATURE)

If you have enabled a consumer WebStore and allowed your customers to make purchases there, they will be given three options after items have been added to their cart. The most common action, **Proceed to checkout**, results in a standard NewOnline order, as outlined in the previous section. Customers can also choose to **Request a quote**, which appears in BookManager very similarly to a standard NewOnline order with a few differences.

4) Point-of-Sale Mosaic Books Online:1 w0
Fri May 20 2016 1:47p #16

To Neill, Trevor Act 80596

PO# OL745137

QUOTE OL745137 This is for a special event I am doing on June 22. Alicia

O/H	Cls	Title	CustPO	ISBN	Qty	Price	%	T	Pt	Total
4		BFG, The	OL745137	9780141365428	1	12.99		1		12.99
5		Book of Speculat	OL745137	9781250055637	1	22.99		1		22.99
2		Born of Betrayal	OL745137	9781250080806	1	12.99		1		12.99
5		City of Mirrors,	OL745137	9780385669559	1	37.00	20	1		29.60
2		End of All Thing	OL745137	9780765376107	1	12.99		1		12.99
2	KIDS	Geronimo Stilton	OL745137	9781629914510	1	13.99		1		13.99
2	KIDS	Sea Change	OL745137	9781101918524	1	21.99		1		21.99
5	FICT	Smoke	OL745137	9781443440677	1	29.99	20	1		23.99
3	BIOG	So Sad Today: Pe	OL745137	9781455562725	1	19.49		1		19.49

Copy Delete @Edt Edit GftRct Lock Misc New Print Qsales Search Total Znosale

Totals for this transaction have been recalculated.


An online order quote will appear in BookManager the same way as a standard NewOnline order will, with an Online indicator appearing in the upper right portion of the screen. Quotes are searched and loaded in the POS the same way as standard online orders. The word **Quote** will appear in red in the **Via** field on the 4 POS Held transaction. The word ***Quote*** highlighted in red will also appear at the beginning of the invoice note field, along with the online order number; and if the customer added any special instructions, those will appear on the rest of this note line. You should always check your store's email after receiving a quote, as only so many characters of the customer's special instructions may appear in the invoice note field, whereas the email confirmation will show the complete message. [see screenshots on next page]

Many institutions and schools will find use of this Request a quote option on the WebStore, and it was previous confusion over the wording of online orders that instigated this alternate type of order. Though regular online orders are not finalized until they are done so by staff, your customers may rightfully assume that Submitting an online order means it is final. The quote allows for clear distinction to the customer that changes can be made, and that nothing is final.

Quotes can be changed or finalized the normal way using **E**dit. A quote is no different from a regular NewOnline order; it is the customer's perception and the simple wording change that differentiates this from a standard order.

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Below is a sample email the customer receives, and a sample email that the store receives:



Hi, Trevor Neill, thank you for your quote request.

We will contact you during normal business hours to confirm availability, final pricing, taxes or shipping charges (if applicable.) We can be reached by phone at 250-763-4418 or by email at orders@mosaicbooks.ca should you have any questions or concerns.

Title	ISBN	Qty	Price	Disc	Total Price
Bfg <small>(will reserve - in stock)</small>	9780141365428	1	12.99		12.99
Book of Speculation <small>(will reserve - in stock)</small>	9781250055637	1	22.99		22.99
Born of Betrayal <small>(will reserve - in stock)</small>	9781250080806	1	12.99		12.99
City of Mirrors <small>(will reserve - in stock)</small>	9780385669559	1	37.00	20%	29.60
End of All Things <small>(will reserve - in stock)</small>	9780765376107	1	12.99		12.99
Geronimo Stilton Graphic Novels #17 <small>(will reserve - in stock)</small>	9781629914510	1	13.99		13.99
Sea Change <small>(will reserve - in stock)</small>	9781101918524	1	21.99		21.99
Smoke <small>(will reserve - in stock)</small>	9781443440677	1	29.99	20%	23.99
So Sad Today <small>(will reserve - in stock)</small>	9781455562725	1	19.49		19.49
Sorcerer's Daughter <small>(will reserve - in stock)</small>	9780345540829	1	37.00	20%	29.60
Summer Guest <small>(will reserve - in stock)</small>	9781443446815	1	22.99		22.99
Tidy <small>(will reserve - in stock)</small>	9781447273981	1	24.99		24.99
Truth and Other Lies <small>(will reserve - in stock)</small>	9780143193425	1	18.00		18.00

Order total (13 titles, 13 items.)
Subtotal: 266.60
Taxes: 13.33
Total: CAD \$279.93

Total discount savings: 20.80

Quote Request (see instructions below)
Reference #: **745137**
May 20 2016 01:37 PM

Instructions to Mosaic Books
This is for a special event I am doing on June 22. Alicia will be getting back to you once the quote has been approved by the higher ups. Thanks!

Customer Details
u141435
Neill, Trevor
250-448-1427
trevor@bookmanager.com

If you would like to review this order, please [click here](#).

Mosaic Books
411 Bernard Avenue | Kelowna, BC V1Y 6N8, Canada
Phone: 250-763-4418 | Fax: 250-763-5211 | Email: orders@mosaicbooks.ca

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Mosaic Books
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Phone: 250-763-4418 | Fax: 250-763-5211 | Email: orders@mosaicbooks.ca