BookHound 8.7 Manual

1.1 Installation

GETTING STARTED

On a Mac, **double-click** the BookHound_8.zip file that you downloaded. **Drag** the unzipped BookHound 8 folder to any permanent location of your choice.

To create a convenient startup icon for Mac users, **single-click** the BookHound 8.app application icon inside the BookHound 8 folder and **choose** "Make Alias" from the Finder's "File" menu. **Drag** the Alias to the Desktop (make sure you drag the alias and NOT the original application icon to the Desktop). You may also drag the application icon directly to your Dock.

On a Windows computer, **double-click** the BookHound_8_setup.exe file. The BookHound 8 folder will be installed in your Documents folder and a shortcut will be created on your Desktop. It is recommended you do not move this folder from its original location.

1.2 Backing Up

GETTING STARTED

While BookHound periodically reminds you to make a copy of the database, it does not provide true automatic back-ups. You are responsible for routinely backing up your "data.fmpur" (single-user version) or "home.fmp12" (multi-user version) file.

Since your "data" file is located inside your BookHound 8 folder, **drag** the entire BookHound 8 folder (not the shortcut or alias on the desktop) to the backup medium of your choice (an external hard drive or portable flash drive are convenient solutions). Alternatively, you can just drag the "data" file (located inside your BookHound 8 folder) to the backup medium of your choice.

Each subsequent time you back up in this manner, your computer will ask you if you wish to replace the folder (or file, if you are just backing up the "data" file) of the same name on your back-up disk. Choose "Replace" (Macintosh) or "Yes to All" (Windows). In this manner, you will be consistently overwriting your old backup.

You may wish to create two folders on your back-up medium and name them "Backup 1" and "Backup 2". Now, copy your BookHound 8 folder to "Backup 1" on one day and "Backup 2" on another. With this method you will always have two back-ups separated by one day. You may also wish to use a third disk to back up monthly and store in an off-site location.

1.3 Inside the BookHound 8 folder

GETTING STARTED

Inside your BookHound 8 folder are several other files and folders that are necessary for the proper function of BookHound. DO NOT RENAME OR MOVE ANY OF THE FILES OR FOLDERS LOCATED INSIDE THIS DIRECTORY.

Normal operation of BookHound will result in some files being automatically placed in some of these folders. For example, printed lists will be saved in the "my_catalogs" folder. Upload files created from BookHound will be saved in the "my_uploads" folder, and want upload files will be saved in the "my_wants" folder.

DO NOT rename these folders or move them to another location or the reliability of some functions will be compromised.

Launch BookHound by **double-clicking** the shortcut (or alias) icon, or double-click the original application icon located in the BookHound 8 folder.

To uninstall BookHound, drag the entire BookHound 8 folder to the Recycle Bin or Trash Can. Windows users can use the Uninstall feature of their Control Panel.

When BookHound is launched you will be presented with the *start screen*. When launching for the first time, **choose** "guest" from the drop-down USERNAME field provided at the center of the screen, then **click** GO.

You can edit usernames on BookHound's PREFERENCES screen; the name you select at startup will be attached to all new inventory, customers, and invoices enabling you to identify each record's creator.

1.4 Entering Data

GETTING STARTED

There are 3 ways to *create new inventory records, customers, and invoices*:

• **click** the blue button labeled NEW in the appropriate section of the *home* screen.

• **choose** New Customer, New Item, or New Invoice from the Actions menu at top of your computer screen (or use the keyboard equivalents indicated in this menu).

• **click** the blue NEW button at right of any inventory or customer screen. Tip: the quickest way to create a new customer invoice is to click the INVOICE button on that customer's entry screen.

Creating a new record using any of these techniques will result in a new, empty *detail screen* with a unique, sequential id number. Your cursor will be placed in the first available field awaiting data entry. *You cannot change this number once created but you can adjust your starting number (see Preferences).* If an item is deleted, its id number goes with it.

Move from field to field by hitting the **tab** key or the **enter** key on your keyboard or simply **mouse-click** into the desired field. Tip: Hit **Shift-tab** to reverse direction.

When you complete a record, you may click the NEW button to create another record or click any other button to initiate another task; you do not need to save your work as BookHound will automatically save your new record every few seconds.

1.5 Drop-down fields (1)

GETTING STARTED

Drop-down fields are designed to make data entry faster, insure consistency and reduce errors. There are drop-down fields throughout BookHound's *entry* screens. Each drop-down field stores a list of choices from which you can make a selection.

Customize a drop-down field's menu to accommodate your own data-entry preferences by **mouse-clicking** the *down-facing triangle* at right of the field to display its drop-down menu of values. **Scroll** to the last value and **choose** “Edit…”, then...

• Enter new values by **typing** them in the desired position(s) in the list. Be sure to separate values by carriage returns.

• Delete unwanted choices by highlighting the choice, then hitting the **backspace** key (Windows) or the **delete** key (Mac).

Click OK when finished.

Note: only fields displaying the down-facing triangle are drop-down menu fields.

1.6 Drop-down fields (2)

GETTING STARTED

There are several ways to select data in a drop-down field:

First, click or tab into the field, then

• begin typing; BookHound will reveal choices that match the characters you type. When the desired entry is revealed hit the **Return** or **Enter** key on your keyboard.

• click the downward-facing triangle at right of the field to reveal your choices. When the field drops down use your mouse to **scroll** down the list and **click** the desired choice.

• manually override the list's choices by **typing** any word or words into the field. BookHound will accept your data but it will not add it to the list of choices.

2.1 The Home Screen

NAVIGATING BOOKHOUND

BookHound always starts with the *home* screen. You can begin any action from this screen by clicking a button or selecting a choice from the menu at the top of the computer screen.

The main portion of the *home* screen is divided into three sections: INVENTORY, CUSTOMERS, and INVOICES. Each of these sections contains buttons that perform basic actions specific to that section.

If you wish to add a new item into inventory, **click** the blue NEW button in the inventory section. If you wish to find a specific customer, **click** the light-gray SEARCH button in the customers section, and so on.

At bottom left of the *home* screen is a blue UPLOADS button; **click** this button to initiate the creation of files suitable for uploading to online marketplaces (see BookHound and the Web).

Reports based upon the data from invoices can be accessed by **clicking** the REPORTS button at bottom right of this screen.

To access secondary features of BookHound, such as the *consignors*, *preferences*, or *lot* screens, **use** the "Go" menu at extreme top of your computer screen.

Tip: All other screens in BookHound have a HOME button at lower right which will return you directly to this screen. Clicking the BookHound 8 logo at top left of any screen will also return you home.

2.2 The Navigation Bar

NAVIGATING BOOKHOUND

At the bottom of most BookHound screens is a *navigation bar*. **Click** on the appropriate button in this bar to quickly jump to the screen identified by the button.

Thus, if you are viewing a list of customers, you can click the INVENTORY button in the *navigation bar* to go directly to the *inventory* screen.

At far left of the *navigation bar* is the BACK button; **click** this button to go back to the previous screen (Note: the BACK button will toggle back and forth between the current and the previous screen; it does not "step" backward indefinately).

At far right of the navigation bar is the HOME button; **click** this button to go directly to the *home* screen (early on you will probably use this button often until you familiarize yourself with the navigation techniques which take you directly to where you want to go; in other words, if you get lost, click the HOME button).

Tip: If you search for a group of inventory records and the list view screen displays 17 records, those same 17 records will remain when you return to the screen using the Navigation Bar.

2.3 Menus

NAVIGATING BOOKHOUND

All screens trigger context-sensitive menus at the extreme top of your computer screen. Go and Actions menus appear above *all* screens. The Go menu replicates the basic areas in the Navigation Bar (and, unlike the Navigation Bar, includes LOTS, CONSIGNORS, PREFERENCES, and the UPLOADS screen).

The Actions menu replicates the buttons on each of the three sections on the home screen, such as **New Item, Find Item, New Customer, Find Customer**, and so on.

The *inventory* and *customer* screens have two additional menus: the Special menu and the Records menu, where operations such as text cleanup, web searching, and import and export of records reside (see the appropriate help section for more information on these functions).

These menus also contain keyboard shortcuts (displayed at right of the menu choice) so that you can use your keyboard to, say, find a customer while on the invoice screen without returning to the home screen.

2.4 Entry Screen vs. List View

NAVIGATING BOOKHOUND

There are two basic ways to view your inventory, customers, and invoices in BookHound: an *details* screen and a *list view* screen.

A *details* screen displays most of the basic fields to enter data for a *single* record (customer, inventory, invoice, consignor, and lot). A *list view* screen displays *multiple* records in a summary-style vertical list.

From an *entry* screen you can access the *list view* screen by **clicking** the LIST button located at the right of all *entry* screens.

From any *list view* screen, you can access a single record's *detail* screen by clicking anywhere on the row in the list view. **Toggle** between *detail* screens and *list view* screens in this manner.

Note: Data cannot be entered in a *list view*; it can only be entered on an *entry* screen.

The records that appear in a *list view* are determined by your last search result (see searching for Records).

Thus, the list view is fluid, usually containing only a subset of your records. To display ALL your records, **click** the LIST ALL button at the top of any *list view* screen. **Click** the LIST STOCK button to display just your available inventory (i.e., only those item records that have a quantity of at least 1).

Tip: You can sort a group of records in a list view by clicking any of the list's column heading names. Shift-click to reverse the sort order.

2.5 The List View (1)

NAVIGATING BOOKHOUND

Buttons affecting *all* (and only those) records appearing in the list view are located along the top of the *list view* screen.

• In the *inventory list view*, the following buttons, in order, are available: **search, list stock, list all, copy list, print list,** and **save list.**

• In the *customers list view*, the following buttons are available: **search, list active, list all, email list, print list**, and **print labels**.

• In the *invoices list view* the following buttons are available: **search, list today**, and **list all**.

To temporarily remove an item from the list (but *not* permanently delete it) **click** the corresponding blue word "omit" at right of the record. The record will be removed from the list, and thus, not affected by any of the functions of the *list view* buttons.

Note: omitting a record from a list view does not delete it from your database—it is only temporarily removed from the current group of records.

The number of records in your current list is indicated at top right of the list view screen. The total number of records in your database, regardless of what is showing in your list is also displayed here. For example, if you have 1,200 inventory items and have just searched for all items with the author, Hemingway (for which you have a dozen items), the top right of the list view screen will show: "viewing 12 of 1,200."

Tip: To add a new record without leaving the list view, use the "Actions" menu.

2.5.1 The List View (2)

NAVIGATING BOOKHOUND

If you are viewing a list of items in the inventory list view and want to preview its full description without going to its entry screen, **click** the MAGNIFYING-GLASS icon in front of the item's id number to reveal that item's full description at the bottom of the screen.

You can sort a group of records in a list view by **clicking** any of the list's column heading names. **Shift-click** to reverse the sort order.

Tip: **Click** the "bar-chart" icon (in the left-most position of the *list view* header) to do a "smart" sort of your list. A "smart" sort will arrange items without an author according to the first letter of the title, rather than place such items at the top of the lest.

Note: BookHound will ignore leading articles alphabetizing titles.

2.6 The Entry Screen

NAVIGATING BOOKHOUND

At the top right of an *inventory*, *customer*, or *invoice entry screen* are four circular buttons containing left- and right-facing triangles.

Clicking these buttons will navigate backwards and forwards among the multiple records in the current *list view*.

Note: If you have only one record in your *list view* and click to its *entry screen*, the four buttons will appear to do nothing as the one record is the first, next, previous, and last record.

• **Click** the inner right-facing triangle button to move forward to the *next* record in the group.

• **Click** the inner left-facing triangle button to move backward to the *previous* record.

• **Click** the outer triangle button(s), left-facing (or right-facing), to move to the *first* (or the *last*) record in the group.

Alternatively, you can **click** the LIST button and scroll down to the desired record in the *list view screen*.

2.7 Sub Navigation Bar

NAVIGATING BOOKHOUND

Unlike the Navigation Bar at the bottom of all screens (which navigates *among* the basic sections of BookHound – *inventory, customers, invoices*, and *catalogs*), the Sub Navigation Bar at the top of any *detail* screen navigates *within* that particular section and pertains only to that record.

Click any button in the Sub Navigation Bar to reveal additional screens for that particular record. Some of these screens contain additional fields for entering data (such as catalogs or private notes); others display information related to that customer or inventory item, such as displaying a history of sales or a list of wants.

The button relating to the screen that you are currently on is orange.

Tip: some of these buttons will display in italics if there is important information there.

You can return to the basic *detail* screen of a particular record by **clicking** the button labeled *details*. All screens have a list button at right so you can directly access the *list view* screen.

Note: The buttons at the top of the invoice screen are not navigation buttons, they perform actions instead.

2.8 Searching for records (1)

NAVIGATING BOOKHOUND

One of the most important functions of BookHound is the ability to locate and display records matching specific criteria, either simple or complex.

To *find* a group of records (customers, invoices, or inventory) **click** on the gray SEARCH button in the respective section on the *home screen*. You can also perform a search by clicking on the gray SEARCH button located in the top bar of any *detail* or *list view* screen.

Tip: these search commands are also located in the Actions menu at the top of your computer screen, allowing you to search for any item, invoice, or customer no matter where you are.

A *search* screen will be displayed containing all the fields available in which to select and locate various groups of records in the particular section (*customers, invoices*, or *inventory*) within which you are searching.

Type your search criteria in one or more of the fields on the *search* screen then **click** the blue GET RESULTS button (or hit the **enter** key on your keyboard).

Note: If you wish to cancel your search, **click** GET RESULTS and you will be returned to the screen where you started.

The group of records found following a search are referred to as the "found set" (or "found group)" of records.

Note: If BookHound finds *more than one* matching record, your results will be displayed in the *list view screen*. If only *one* record matches your search criteria, BookHound will display that record's *detail* screen.

2.8.1 Searching for records (2)

NAVIGATING BOOKHOUND

You may enter data into more than one field for complex searches. For example, **enter** [first] (no brackets) in the EDITION field and [>0] in the QTY field to find all your stocked, first editions.

You can use symbols to aid in your searching:

• Enter an **equals sign** [=] in any field to find all those records that contain *nothing* in that field (this is useful for finding records for which you failed to enter, for example, a publisher).

• Precede a number with the **greater-than** [>] or less-than [<] symbol to find records with data greater than (or less than) the number entered (for example, enter, >345 in the ITEM ID field to find all your records with id numbers that are 346 and greater).

• Enter an **asterisk** [*] in any field to find all those records with *anything* in that field (for example, you wish to find just your international customers: assuming you do not enter anything in the COUNTRY field for domestic customers, you can enter an asterisk in the COUNTRY field on the *customer search screen* to find all your customers for whom *any* country has been entered).

• Enter **three dots** (…) between prices or dates to find records with prices or dates within (and including) the specified range (for example, enter 01/31/16...03/25/16 in the ENTRY DATE field to find all those records entered during the specified range).

2.8.2 Searching for records (3)

NAVIGATING BOOKHOUND

You may also search for records that contain the desired search criteria **or** satisfy a different search criteria:

For example, **type** your first set of criteria such as [first] in the EDITION field and [>45] in the price field, then **click** the small, blue PLUS-SIGN button at top right; a new, blank search screen will result.

Type your second criteria such as [second] in the EDITION field and [>99] in the PRICE field.

When you **click** the GET RESULTS button BookHound will display all your first editions with prices that are greater than $45 *as well as* your second editions valued at $100 or greater. Note: this is commonly referred to as an "or" search.

You can now use the buttons at the top of the resulting *list view screen* to sort, print, save, or e-mail this list.

3.1 Default item fields

INVENTORY

Some fields on an *detail* screen of a new item automatically receive values when created. These values are called “default” values.

When a new record is created the QTY (quantity) field automatically receives a value of 1. To increase or decrease this value **click** into the QTY field and adjust the number accordingly. A 0 indicates that you no longer have the item; records with a positive quantity are available for sale and upload.

Note: when a record’s QTY field is adjusted, the record will be re-queued for inclusion in the next upload file, either as an *add* or a *remove*, depending on the value of the quantity.

The TYPE field automatically receives the value "Book." The *default value* for this field can be changed in the *preferences screen*. Note: This field is included in the upload file for online marketplaces.

If you entered your name in the CURRENT USER drop-down field on the *home screen* BookHound will automatically apply that name to every new record created during that session (appearing at the bottom right of all screens except *list view* screens).

The ENTRY DATE field automatically receives the date the item was created.

3.2 Adding new items

INVENTORY

There are four ways to add an item to your inventory:

• Click the NEW button on the home screen in the inventory section.

• Click the NEW button at right of any inventory entry screen.

• Choose NEW ITEM from the Actions menu.

• Click the CLONE button at right of any inventory screen.

Each of these buttons (with the exception of the CLONE button) will immediately create a blank record with a new, unique ITEM ID number (one greater than the last existing ITEM ID number in your database).

The CLONE button will duplicate the current record and assign the next highest available ITEM ID number to the newly duplicated record.

When a new blank item record is created your cursor will automatically be placed in the *author* field.

Tip: To achieve best results when sorting records by author type the author's name in the following format: *last name, first name*. To enter more than one author, the following format is acceptable: *Flaubert, Gustave and George Sand*

Note: A new item record is saved the moment it is created so you do not need to do anything to save a record. When you have finished entering data for a record, simply click the new button to add another record or click any other button to perform a different task.

3.3 Menus: Special (1)

INVENTORY

Most routine functions of BookHound can be done without using the *menu* at the top of the computer screen. Many of the functions in this menu are redundant but there are several which can only be found here:

Special | **clean up text**

If you have copied and pasted text from another source such as a Microsoft Word document or a Web page, *Clean up Text* will remove unwanted line breaks and undesirable formatting.

Special | **check spelling**

Checks all the fields on a particular entry screen.

Special: **web search:author/title**

If you have entered an author, title, or author and title BookHound will search the Web for more information on that title. You will have the choice of the meta-search engine, *viaLibri*, or the current listings of *Biblio.com*. Whichever you select, BookHound will automatically launch your default web browser and perform the search.

3.3.1 Menus: Special (2)

INVENTORY

Special: **web search:isbn**

If your record has an isbn number in the isbn field BookHound will launch your default web browser and search *Biblio.com* for records matching your isbn number.

Special: **show hit list**

Recalls (as the "found group") all items which you have added to your *hit list* (by **clicking** the empty box at right of an item in the *list view* screen).

Special: **add group to hit list**

Adds the entire "found group" in the *list view* to your Hit List. Each item in the list will display the hit list symbol at its right. This *hit list* can now be recalled at anytime by choosing Show Hit List. Items can be individually added to and from the hit list by clicking the area at right of the item row (beneath the white cross/green circle icon).

Special: **add item to existing invoice**

Adds the item to the currently open invoice.

3.4 Menus: Records (1)

INVENTORY

Records: **value report**

Displays a report totaling the prices (qty x price) and amount paid (qty x cost) of the items in the current list. For example, to get a value report of all your in-stock items, click the LIST STOCK button on the *home* screen or the LIST STOCK button at the top of the *list view* screen before selecting Value Report.

Records: **uploads/smart upload**

Choose Smart Upload to initiate creation of an upload file withoout going to the Uploads screen. This performs the same function as clicking the UPLOADS button at the bottom of the *home* screen. For more information on creating upload files, see BookHound and the Web.

Records: **uploads/from current list**

Overrides BookHound's Smart Upload process and creates an upload file containing only those items in the *current* list, regardless of what is queued on the uploads screen. Rarely used but useful when correcting or calibrating online listings. After choosing From Current List select the file name of the file you wish to upload (a-books, b-books, c-books, or amz).

Records: **maintenance/find blank titles (prices)**

Displays all records for which you have not entered a title (price).

3.4.1 Menus: Records (2)

INVENTORY

Records: **maintenance/delete current Item**

Permanently deletes an item. To delete all the items in the current llist, hold down the Shift and Alt keys (Windows) or the Shift and Option keys (Macintosh) while selecting Records/Maintenance/Delete Current Item.

Tip: Do not delete an item record when it is sold. If you do, BookHound cannot indicate this sale to your online marketplaces. Instead, use the invoice feature or drop the QTY field from 1 to 0; the record will then be included in the next upload file, earmarked for removal from online marketplaces.

Records: **maintenance/global edit current records**

Replaces data in *one* field for all the records *currently being viewed* in the *list view* screen.

THERE IS NO UNDO FOR THIS FUNCTION SO ALWAYS BACK UP YOUR Data.fmpur FILE PRIOR TO PERFORMING A GLOBAL EDIT.

The Global Edit function applys to the field in which your cursor resides so t**ype** the desired value in the field and leave your cursor blinking there.

Then, **select** Global Edit from the Records menu. In the next window, **click** “It is” when asked if your cursor is still in the field you edited (if you are not sure about this, click "Ooops").

In the next window, **click** the REPLACE button.

3.5 Sub Navigation Bar: Subjects

INVENTORY

SUBJECTS

You may earmark individual inventory records by using the SUBJECT field on the *details* screen. You may also use up to four different subject fields for more sophisticated categorization. SUBJECT 2 and SUBJECT 3 use the same *drop-down* menu as the main SUBJECT field. SUBJECT 4 and SUBJECT 5 have their own respective drop-down menus. Each of these fields can be considered as major category fields or simple keyword fields, it is your choice.

Once you have earmarked your records in this way (i.e., by giving them some value in the SUBJECT field on the *details* screen, and/or selecting one or more subjects on the *subjects* screen) subsets of your inventory can easily be found by using the *search* screen. Note: all 5 SUBJECT fields are included in the file that is created for upload to online marketplaces.

PREVIEW

At the bottom of the subjects section is a preview of how your item record will look when printed from BookHound. This field cannot be edited. To copy your full item description **click** the COPY DESCRIPTION button. You can then **paste** this full description into the document of your choice, such as the body of an email, a Microsoft Word™ document, TextEdit, etc.

In most cases this is also how your record will appear when uploaded to online listing services, however, each online service displays records differently so there is no guarantee that your record will look exactly like it does in the *preview* field.

3.6 Sub Navigation Bar: Web (1)

INVENTORY

The *web* section contains information pertaining to the item's Internet status such as when this item was last included in an upload file and whether this item is ok to be uploaded at all (yes or no).

BookHound can create up to three separate files suitable for upload to online marketplaces such as Biblio.com, Antique Book, TomFolio, ABAA/ILAB, Alibris, Advanced Book Exchange and others.

One special upload file can be created specifically for upload to Amazon™ Marketplace.

OK TO UPLOAD?

The OK TO UPLOAD? field receives a default value of "yes". Thus, every new item you enter is automatically queued for inclusion in the next upload file.

If you do not want an item to be uploaded, **change** this item's OK TO UPLOAD? value from yes to no.

Tip: you can change the *default* setting for this field in BookHound's preferences screen so that all newly entered items will receive a no (and thus *not* automatically be included in your upload files). You can then manually change desired records to yes if/when they are determined to be ready for upload.

3.6.1 Sub Navigation Bar: Web (2)

INVENTORY

If you store images of your records online and wish to upload the url for this image along with the rest of the bibliographic data, click the plus-sign button at right of the image path field.

You must first enter the internet path of your online storage location on the preferences | web screen. Make sure your images are named after your item id numbers (e.g. if your record id is 345 your image name should be 345.jpg).

RESENDING THIS ITEM

If you make a change to an item that is *already* online **click** the RESEND THIS ITEM link at right of the last upload file date. This record is now ready to be included in your next upload file (where it will overwrite the existing record that is online with your new, edited one).

As you sell items (either by using the invoice function or manually changing the qty from 1 to 0) BookHound automatically queues these records for "removal" in your next upload file. The main reason to use this section is, as discussed above, to resend an item to which you have recently made changes or to prevent an item from being uploaded regardless of its quantity.

Tip: BookHound will also re-queue an item for inclusion in the next upload file when the qty field is clicked, whether the quantity is changed or not.

AMAZON DEFAULTS

BookHound will default to allow international shipping and expedited shipping unless you change these settings on the *preferences* | *web* screen.

3.7 Sub Navigation Bar: History

INVENTORY

The *history* screen stores information from invoices on which the particular item has been sold. To jump directly to the invoice on which an item has been sold, **click** the green, right-facing arrow in front of the *invoice id* field.

Beneath the sales section is a similar section indicating all the saved catalogs in which this item has been included. You may add an item to an existing catalog by selecting the catalog name from the drop-down menu located under CATALOG NAME.

PRIVATE NOTES

You may enter anything you like in the *private notes* field. Data entered in this field is not printed or uploaded so it can be used as an internal, "for-your-eyes-only" field. This field is, however, included on BookHound's *search* screen.

CUSTOM FIELDS

Three CUSTOM fields are also provided or further organization of inventory. Data in these fields will not appear in the bibliographic display of an item, nor are they uploaded to online book selling services, however, they all appear in BookHound's *search* screen. Unique about these three fields is the ability to rename them. Simply **click** the blue field names and **select** a choice from the resulting drop-down menu. If the choices are not to your liking, edit the list as you would a normal drop-down menu.

CONSIGNMENT AND LOT FIELDS

See Consignments & Lots for information on how to use these fields.

3.8 Hit Lists

INVENTORY

A *hit list* is a group of temporarily earmarked (but otherwise unrelated) records that can easily be recalled and assembled into a printed (or e-mailed) list.

CREATING A HIT LIST

To add items to your *hit list* **click** the small box at right of any title when viewing records in the *list view screen*.

A green and white icon will appear indicating the item is now part of your hit list (note the column is also identified by the similar icon at the top of the column).

To remove a single item from your hit list, **click** its green and white icon again (the icon will disappear). Tip: To add the entire "found group" to your hit list, choose ADD GROUP TO HIT LIST from the “Special” menu.

RETRIEVING A HIT LIST

Click the green and white icon at the head of the *hit list* column (or select Show Hit List from the “Special“ menu). You can now sort, print, copy or save this list by using the appropriate buttons at the top of the *list view screen*.

Remember, you only have one *hit list* to work with so be sure to clear it out when you are done with it. Tip: Once you have retrieved your completed *hit list* you can **click** SAVE LIST to permanently save it, freeing up your *hit list* for future use.

To remove all items from your hit list, **shift-click** the green and white icon at the top of the column. Note: this action is not reversible so be sure you no longer need this hit list before completing this action.

3.9 Working with LIsts

INVENTORY

Once you have assembled your desired records in the *list view* screen, you can remove unwanted items by **clicking** the blue word, OMIT at right of the record.

Click the appropriate column header to sort the list by the desired criteria. If you click PRINT LIST BookHound will ask you if you want to sort the list; if you click COPY BookHound will copy the list as-is.

Click the PRINT LIST button at the top of the list view screen. Name your list in the next window then **click** ok.

You can then choose to print a detailed, catalog-style document (based on your display preferences), a short, non-descriptive list, or export a standard catalog-style Microsoft Word-ready document (which will be automatically saved in BookHound's "my_catalogs" folder).

COPYING A LIST

Click the COPY LIST button. If your list contains less than 1000 records BookHound will copy the list, in the catalog-style based on your display preferences.

You can now PASTE this list into the body of an email or any text-editing or page-layout document, where you can refine your document, add images, etc.

If your list is larger than 1000 records, it is recommended that you export the list using the print list button (see above) instead of the copy list button.

4.1 Creating a Catalog

CATALOGS

In BookHound, a *catalog* is simply a saved list. Once a catalog has been created (containing at least one item record), items can be added or removed and the catalog can be recalled, printed, copied, or merged with another catalog.

Click the SAVE LIST button at top of the *list view* screen to create a catalog containing all the items that are currently being viewed (you can also create a new catalog with a single record, then add items to that catalog later).

Name your catalog in the field provided on the next screen, then **click** the SAVE CATALOG button (or choose a catalog name from the drop-down menu if you are adding this group to an existing catalog).

Remember, the save list button acts upon all the records in the current list so be sure you are not inadvertantly creating a catalog of all your inventory records!

To create a *sectioned* catalog, **type** the name of the section in the field indicated and **select** the postion of this section from the POSITION field before **clicking** SAVE CATALOG. Repeat the SAVE LIST process with each new "found group" to create additional sections. You can change an item’s section later.

Tip: you can create a catalog with just one item: search for the item then **click** the LIST button on its *entry screen* to view that single item in the *list view* screen. **Click** the save list button and proceed as above. You now have a catalog containing one item, to which you can add additional items one-by-one, as described in the next section.

4.2 Working with Catalogs (1)

CATALOGS

To add items to an existing catalog, **click** the item's HISTORY button in the Sub Navigation Bar. In the lower portion of this screen labelled CATALOGS **select** the desired catalog from the catalog name field. The item will be added to that catalog.

If this is a sectioned catalog, be sure to select the section (position) and section name.

Remove an item from a catalog by clicking the red-circle icon at right.

THE CATALOG MANAGER

When you save a catalog BookHound will show you the *catalog manager* screen.

Access the *catalog manager* screen at any time by **clicking** the CATALOG MANAGER button on the item's *history screen*, by choosing CATALOGS from the Go menu, or by clicking CATALOGS in the navigation menu at bottom of any screen.

From the *catalog manager* screen you can locate and remove duplicates (whose titles will be blue), alphabetize and serialize the catalog, delete an entire catalog and output a catalog.

To view items in any saved catalog, **select** the desired catalog from the MY CATALOGS field at top left. **Click** the RED CIRCLE icon at right of the item you want to remove from a catalog (removing a duplicate will change its twin record to the standard black, indicating there are no more twins for this item).

When you are satisfied with the composition of your catalog **click** the SERIALIZE button at right to sort the catalog (first, by section, if relevant) and add serial numbers (choose to not display serial numbers from the *preferences* | *display* screen).

4.2.1 Working with Catalogs (2)

CATALOGS

If you have been compiling your catalog over time, some items may have sold in the interim. **Click** the blue QTY column heading to update the quantities shown in the *catalog manager* screen. You can now locate the items with zero QTY and remove them prior to clicking the SERIALIZE button.

You can reposition catalog items after serialization by manually changing the serial value in their NUMBER field. For example, change 3 to 2 and 2 to 3 then click outside of the field and these items will change places. Note: clicking the SERIALIZE button again will undo these changes!

To print this catalog directly from BookHound, **click** the PREVIEW | PRINT button. To insert the formatted catalog into the editing software of choice (or just the body of an email) **click** the COPY button.

How the catalog appears when printed or copied depends on the selections you make in BookHound's *preferences* | *display* screen.

Click the green arrow icon next to the item to jump to that item's *inventory details* screen (click the back button in the Navigation Bar to return to the *catalog manager* screen).

Permanently **delete** an entire catalog by choosing DELETE THIS CATALOG from the Records menu.

5.1 Adding new customers

CUSTOMERS

There are four ways to add a customer in BookHound.

• **Click** the blue NEW button on the *home* screen in the customer section.

• **Click** the blue NEW button on any *customer* screen.

• **Select** NEW CUSTOMER from the *Actions* menu.

• **Click** the CLONE button at right of any *customer* screen.

Each of these buttons (with the exception of the CLONE button) will immediately create a blank record with a new, unique CUSTOMER ID number (one greater than the last existing CUSTOMER ID number in your database).

The CLONE button will duplicate the current record and assign the next highest available customer id number to the newly duplicated record.

When a new blank customer record is created your cursor will automatically be placed in the PREFIX field.

Choose a PREFIX or hit the **tab** key to move to the next field.

If the shipping information is the same as the billing address, click the blue words *same as billing.*

5.2 Special customer fields

CUSTOMERS

The TITLE field will appear on the same line as the customer name when printed on labels, so you may wish to abbreviate lengthy titles.

Use the TYPE field to earmark a customer, such as vendor, private, dealer, or library. The default value, "private", can be changed in the *preferences* | *customers* screen. Note: the TYPE field is used in creating sales reports *by customer type*.

Use the INVOICEE field on the customer’s entry screen to indicate whether you want BookHound to use the *customer name* or the *company name* when creating invoices for this customer.

The STATUS field indicates whether the customer is active or not. When you click the LIST ACTIVE button from the *home* screen or at the top of the *list view* screen only those customers with "active" in this field will be displayed.

The SOURCE field indicates where you acquired this customer from.

Choose a TAX ZONE from the drop-down field and the TAX RATE associated with that zone will automatically be entered (add tax zones by clicking the EDIT TAX RATES button on the *preferences* | *invoices* screen. If a customer receives a routine discount, enter it in the DIS% field. Note: both tax and discount rates will be automatically entered in an invoice created from the customer screen.

Enter the customer's dealer resale number (if any) in the *resale num* field. This field can be toggled to appear (or not appear) on invoices by checking the box next to *display resale num* on the *preferences* | *invoices* screen.

5.3 Customer Sub Navigation Bar

CUSTOMERS

HISTORY

There are no data entry fields in this section. The top section displays a list of all items purchased by the customer. The bottom section lists all invoices attributed to this customer.

Click the right facing arrow preceding a purchase or invoice row to jump to that invoice.

To print a report of all purchases for this customer or a statement of outstanding invoices click the PRINT CUSTOMER PURCHASES and PRINT CUSTOMER STATEMENT buttons, respectively.

WANTS

Enter keywords, topics, authors, etc in the TOPICS field at the bottom of this screen. This field can then be searched using BookHound's *customer search* screen.

To create a customer *want* which can be uploaded to online marketplaces **enter** the AUTHOR and TITLE in the upper section of this screen. You may further refine the *want* by using the additional fields provided. Note: If the WANT is not to be uploaded, select "No" in the UPLOAD field.

NOTES

The PRIVATE NOTES field is for internal use and can be searched. ENTRY DATE automatically receives the date the customer record was created. UPDATE automatically changes each time the record is edited.

5.4 Customer list view screen

CUSTOMERS

The customer *list view* screen behaves in the same way as the *inventory* and *invoice list view* screens: buttons along the top affect the current "found group" of records. **Click** a row to reveal the *customer details* screen. **Click** a column heading to sort the list by that criteria. **Click** the OMIT link at right to temporarily remove the customer from the list.

To preview a customer's billing and shipping addresse without jumping to its *entry* screen, **click** the MAGNIFYING-GLASS icon at far left.

Tip: You can then **click** the blue words BILL TO (or SHIP TO) to copy the entire address to your computer's clipboard and take advantage of thermal label printers that can print single labels from information stored on the clipboard. This is also a convenient technique when using third-party postage software which can access your clipboard.

Click PRINT LIST to print a list of the customers' contact information.

Click EMAIL LIST to export the email addresses of the "found group" into a text file suitable for uploading to professional bulk-mailing services such as ConstantContact™ or MailChimp™.

5.5 Printing mailing labels

CUSTOMERS

BookHound comes with pre-set formats for the commonly used Avery 5160 thru 5164, 5663 and 6464 label formats. **Set** your default label format on the *customers | preferences* screen.

First, **click** the appropriate column heading in the *list view* to **sort** your customers by zip code or customer name (**shift-click** to reverse the sort order).

Then, **click** PRINT LABELS to print Avery™ brand (or compatible) sheet-fed labels for the "found group" of customers.

Select the type of address you want to print (billing or shipping) in the next window.

BookHound will preview your addresses on screen; **click** the light-blue CONTINUE button at extreme top-right to activate your printer's setup window (cancel printing to returne to the *list view* screen).

6.1 Creating an invoice (1)

INVOICES

There are three ways to create an invoice:

• **Click** on the NEW INVOICE button at the right side of any c*ustomer* screen.

• **Click** on the NEW button in the invoice section on the *home* screen.

• **Select** NEW INVOICE from the Actions menu.

STARTING AN INVOICE FROM THE CUSTOMER SCREEN

This is usually the best way to create an invoice. Tip: **search** for the customer first to avoid re-entering an already existing customer. If no results are found, you can then enter the new customer and **click** the NEW INVOICE button. That way, you can be sure that all invoices for a particular customer are associated with only that customer record.

STARTING AN INVOICE FROM THE HOME SCREEN

When you start a new invoice from the *home screen* you will be prompted to create either a "shop" or a "customer" invoice.

A "shop" invoice is a generic invoice without a specific "customer." Use this type of invoice when there is no need to personalize the sale, such as over-the-counter transactions where you do not need information about the customer. All Shop invoices will aggregate under the "General Sales" (customer id: 0) identity.

6.1.1 Creating an invoice (2)

INVOICES

A "customer" invoice is an invoice assigned to a specific customer that you have previously entered into BookHound. Use this type of invoice for a specific customer, company, or institution. All invoices of this type will be permanently associated with the customer, enabling you to view all purchases or invoices for that customer over time, as well as generate useful sales reports.

If you choose "customer" a new invoice will be created and your cursor placed in the top left field awaiting a customer name. **Start typing** the customer name (or company), then select the desired customer from the list of customer names matching what you type.

If the customer does not appear in the drop-down field, a warning in red text will appear at the top of the invoice. Click this warning to enter your new customer.

BookHound will take you to a new, blank customer record where you can enter this customer's contact info. When finished, click the INVOICE button at right and BookHound will create a new invoice for this customer (since this customer is now in your customer file, they will appear in the invoice drop-down menu for all future invoices).

6.2 Completing an invoice (1)

INVOICES

When you create a new "shop" invoice, your cursor begins in the ITEM NUM field in the first row of the new blank invoice.

When you create a new "customer" invoice, your cursor begins in the SOURCE field of the new blank invoice. **Choose** the source of this sale from the drop-down menu and your cursor will jump to the first ITEM NUM field.

Enter the inventory item id number of the item you wish to sell and hit the **tab** key on your keyboard. BookHound will automatically fill in the AUTHOR, TITLE, and PRICE information and assume you wish to sell one copy. If you wish to sell more than one copy, **change** the QTY field in the line-item row to the desired quantity. If you attempt to sell more than are currently on hand, the line item will turn red.

Hit the **tab** key a few more times to send your cursor to the ITEM NUM field on the next row and type the next item id number.

After you finish entering your last item in the line-item portion of the new invoice hit the **tab** key on your keyboard several times to move your cursor to the invoice totals section at bottom right.

6.2.1 Completing an invoice (2)

INVOICES

Usually, you will **tab** through the PERCENTAGE DISCOUNT and TAX ZONE fields as they are auto-filled from data entered on the *customer entry* screen.

Choose a shipping method in the SHIP VIA drop-down field. Your cursor will then move to the next field where you can enter your shipping & handling charges in the SHIPPING field.

Hit the **tab** key or **mouse-click** to the *payment method* field and make a selection from the list of drop-down values. Note: If payment has not yet been received leave this area blank; you can return to this invoice when your payment is received and record the payment at that time.

If you enter a payment in error **click** the RED CIRCLE icon at left of the payment to delete it.

The current DATE PAID and the AMOUNT will automatically be entered. Change this AMOUNT if a partial payment was received (a new available payment row will be created allowing you to enter a second payment later, if necessary).

Click the green APPLY PAYMENT button (now appearing at right) to apply this amount to the invoice total.

6.3 Posting an invoice

INVOICES To properly record your invoice **click** the large blue POST THIS INVOICE button at bottom right.

Posting an invoice does two things:

• commits the invoice for inclusion in sales reports.

• decrements the inventory quantity for each line-item by the quantity sold.

When an inventory items' QTY field drops to zero it will automatically be included in the next upload file (and subsequently removed from online marketplace listings).

You can post an invoice *before* receiving payment or *after* you enter the payment amount. An un-posted invoice will remain in BookHound but it will not be included in reports, nor will the quantities of the sold items be reduced in inventory (thus, items on an un-posted invoice will not be considered "sold" until the invoice is posted).

After clicking the POST THIS INVOICE button you will be prompted to print the invoice. If you choose "No" you can return to this invoice and print it at any time by clicking the PRINT button at top of the invoice.

6.4 Deleting an invoice

INVOICES **Choose** *Delete this Invoice* from the Records menu.

When a *posted* invoice is deleted, BookHound will readjust upward the quantities of the items on that invoice, effectively adding them back into stock; these items will be included as additions to online stock in the next upload file.

If you delete an invoice that has *not* been posted, the items' inventory quantities are unaffected (since these items' quantities were not affected in the first place).

To void (but not delete) an invoice select "void" from the TYPE drop-down field at top center of the invoice. A "void" invoice will remain in your BookHound list of invoices but it will not be included in any sales reports.

6.5 Advanced Invoicing (1)

INVOICES To apply a percentage discount to a particular line-item **click** into the DIS% field at right of the item and choose a percentage discount from the list of drop-down values.

To apply a discount to the *entire* invoice, **click** into the PERCENTAGE DISCOUNT field in the invoice totals section and select an amount from the drop-down menu.

To apply a *non-percentage* discount for a particular item or the entire invoice, *create a new line item* by **clicking** in the DESCRIPTION field of the next available row. **Type** a brief explanation for the discount, then **click** into the price field and **enter** the discount amount p*receded by a minus sign*. The discount will appear as a line item with a negative extended amount.

Click the blue EDIT | NOTE link above the shipping address label at lower left of the invoice screen to enter a brief note that will appear on the printed invoice.

You may also edit BILLING or SHIPPING addresses here, useful for drop-ship arrangements. Note: changing an address on a particular invoice does not change the original address for that customer as the change is stored with the invoice only. Permanent changes to a customer address need to be made on the *customer details* screen.

Use the PO NUM field at top of the invoice; the number will appear at the top of the printed invoice. To enter a purchase order number for *each* line item, enter it in the AUTHOR-PO field in place of the author.

6.5.1 Advanced Invoicing (2)

INVOICES

To add items that have *not* been entered into your BookHound inventory **click** into the AUTHOR-PO and/or DESCRIPTION fields and enter the desired information. **Click** into the PRICE field and enter the desired price. The quantity is automatically set to 1. If necessary, edit this quantity by clicking into the QTY field and enter the number being sold.

To delete a particular line item on an invoice, **click** the RED CIRCLE icon at right of the line item.

To jump to a line item's *inventory detail* screen, **click** the right-facing arrow at left of the item.

Tip: If you do not know the ITEM NUM of the item you wish to invoice, **choose** FIND AN ITEM from the Actions menu, then search for the item in the resulting *inventory search screen*. When you find your item **choose** ADD ITEM TO EXISTING INVOICE from the Special menu. You will be returned to your invoice and the item will automatically be entered into the next available row.

If you choose not to use the invoice functions in BookHound, you can sell an item simply by **clicking** the SELL button located above the item's QTY field. If this results in a zero quantity the item will be included in the next upload file (and subsequently removed from your online marketplace inventory).

This is the quickest method to "sell" an item. If you do not want a sale to be recorded in the report functions, **mouse-click** into the QTY field and manually adjust it instead of clicking the SELL button.

6.6 Processing a return

INVOICES To process a return first **create** a new invoice for that customer.

Enter the ITEM NUM of the returned item on the invoice and hit the **tab** key on your keyboard (just as you would if you were selling this item).

Click into the QTY field and change the quantity from 1 to -1. By entering minus-1 in the QTY field you are, in effect, receiving the item back into stock.

Choose "Return" as the payment method then click POST THIS INVOICE. The item's quantity will be decremented by minus 1 which, in effect, will *add* the item back into stock (and thus include the once-sold item in the next upload file).

To create a credit memo choose "Credit" from the TYPE field at top center of invoice.

Enter the PAYMENT METHOD as "Refund" or "Return", and **click** the APPLY PAYMENT button, then **click** POST THIS INVOICE (just as you would when completing a regular invoice). The title of the printout will indicate Credit Memo. Note: BookHound does not store or manage customer credit.

6.7 Changing invoice date or invoicee

INVOICES CHANGING AN INVOICE DATE

To change the date of an invoice, **click** into the DATE field at top right of the invoice and **select** the desired date (past or future) from the drop-down calendar. Note: changing invoice dates may change report totals as sales may, for example, migrate from one month to another.

CHANGING AN INVOICE CUSTOMER

To change the customer associated with an invoice, **click** on the customer name at top left of the invoice. **Click** "Yes" in the resulting prompt window.

The *customer name* field will become highlighted. **Start typing** the name of the new customer and select the matching customer from the list. Hit the **tab** key on your keyboard to exit the field.

To complete the change, **click** the red text: *click here to complete change,* to the right of the new customer name. Your existing invoice will now be associated with the new customer.

6.8 Emailing an invoice

INVOICES To create a .pdf file to attach to an email, **click** the PDF button at top of the *invoice entry* screen. A message will appear prompting you to name the file and choose a destination on your computer. **Click** OK.

Name your file (e.g., "Jones_Inv"), select a destination (e.g., Desktop) and **click** save.

Note: this feature is available for network versions of BookHound only. Single-user versions of BookHound must click PRINT, then use the printer dialog box to save the invoice as a .pdf document.

Tip: Macintosh users have this feature built-in; Windows users must download .pdf creation software.

7.1 Online book-listing marketplaces

BOOKHOUND AND THE WEB

Once you have established an account with an online marketplace you will need to send an email to these services informing them what they can expect your upload files to look like.

From the *preferences* | *web* screen **click** the blue word COPY at top right. This will copy the information an online marketplace needs to prepare your account to accept a BookHound 8-created upload file.

You can now **start an email** to your respective marketplaces and use your computer's **paste** command to insert this information into the body of your email.

Wait for confirmation from these marketplaces before uploading your first file.

Note: Internet marketplaces accept many different types of files generated from a variety of sources. If you attempt to upload a file before these services have been notified of the source of your file you may experience unwanted errors and delay.

7.2 Understanding upload files (1)

BOOKHOUND AND THE WEB

In BookHound, you will routinely create (and upload) *tab-delimited* text files, which will contain both your newly entered stock (those items not yet uploaded with a quantity greater than zero) and stock that has been recently sold.

Thus, you have only to enter new inventory records and "sell" them using the invoice function (or manually reduce the qty field of a sold item from 1 to 0) to maintain an accurate online stock.

When you create an *upload file*, BookHound will automatically name it and save it in the "my_uploads" folder located in your BookHound 8 folder (DO NOT MOVE OR RENAME THIS FOLDER). It is then your responsibility to use the tools on your online listing services' web page to properly upload these files.

You can create up to three standard upload files and one upload file suitable for Amazon Marketplace™.

Most often, you will only create the *a-books* file and, if you have an Amazon Pro Merchant account, an *amz* file. You can send the *a-books* file to most services (Biblio.com, Alibris, Advanced Book Exchange, Tom Folio, your own website, etc.).

Tip: Use the *b-books* file (and/or the *c-books* file) if you wish to adjust prices for a particular service to whom you would send only that file.

By using each file's respective OK TO UPLOAD? field on individual item records you can control which records go to different sites.

7.2.1 Understanding upload files (2)

BOOKHOUND AND THE WEB

Every new item record you enter into BookHound is, by default, queued for inclusion in your next upload file, that is, it automatically receives a "yes" value in its OK TO UPLOAD? fields.

Change these defaults (so, for example, all newly entered items in BookHound will *not* be included in an upload file) on the *preferences* | *web* screen.

Select "No" for each of the three possible upload files beneath the OK TO UPLOAD? heading, otherwise, leave this setting at "Yes."

To manually include (or exclude) an individual item from an upload file, **click** the WEB button on the Sub Navigation Menu for that item. **Select** "Yes" under the OK TO UPLOAD? heading to include this item in your next upload file; click "No" to exclude this item from any upload file.

Should you edit an item that is already online and wish to include this modification in your next upload, **click** the blue RESEND THIS ITEM link.

Note: Do not click "No" when an item is sold. If you do so, the item will not be included in the next upload file for removal. Click "No" only when you don't want the item to be uploaded in the first place.

7.3 Creating upload files

BOOKHOUND AND THE WEB

Once you have created an account with one or more online listing services and notified them (you do not need to notify Amazon) of BookHound's upload file structure, you are ready to create an upload file.

From BookHound's *home* screen, **click** the blue UPLOADS button at bottom left of the screen.

In the *uploads* screen **click** the blue "create a-books-1.txt" button.

A message will follow alerting you that your upload file has been created and stored in your "my_uploads" folder. The name of the file will be the same name as the button you clicked. Thus, in the above example, your most recent upload file will be named "a-books-1.txt." The button's name will then change to show the next sequential number, in this example, "a-books-2.txt".

Note: the name of the upload button will change as your create subsequent upload files (for example, if you already have created 4 upload files this button will be named "create a-books-5.txt").

7.4 Uploading your file(s)

BOOKHOUND AND THE WEB

Once the upload file creation procedure finishes, you will want to transfer your files onto your online listing service's web site.

Each service has its own method for handling such file transfers (consult the Members section of the marketplace's website, or the instructional email that many marketplaces send their new members).

Generally, each service provides tools on their respective web pages that allow you to "Browse" your computer and locate the files to upload (find them in the "my_uploads" folder where BookHound originally saved them).

Once you locate your most recent upload file, use your online listing services directions for uploading the file.

New items will be added to your online listings and recently sold items will be removed. Re-sent items will replace the already-online item with the same id number.

7.5 Purging your online listings

BOOKHOUND AND THE WEB

Most services have a "purge" option that allows you to delete all existing online records so that you can replace them with an upload file containing *all* your available items.

A "purge" file is simply a file containing all your in-stock inventory that has a value of "Yes" in its OK TO UPLOAD? field regardless of whether the inventory item as been previously uploaded.

Note: items without titles or prices are never uploaded.

To create an upload file of all your stock, **check** the PURGE? box for the corresponding upload file on the *uploads screen*, then **click** the blue create A-BOOKS-1.TXT button at right.

In a few moments you will receive a message that your "purge" file has been created and stored in your "my_uploads" folder.

After creating a "purge" file, be sure to select the online listing services' purge function before uploading your file.

Note: if you have a large inventory, the purge process is not recommended as your routine online record management procedure. However, it is useful to do every 6 months or so to insure that your inventory on multiple listing services is up-to-date.

7.6 Managing Amazon™ uploads

BOOKHOUND AND THE WEB

To upload to Amazon, you must use the AMZ upload file button. This creates a specially designed upload file for Amazon and contains several Amazon-only fields. These fields can be edited in the WEB section for a particular inventory item. Most of these special fields are pre-set from default settings you can adjust on the *preferences | web* screen.

If you wish items to be prevented from being shipped internationally, change the will ship internationally field from "Yes" to "No."

Once you have created your AMZ upload file (it is automatically stored in your "my_uploads" folder just like all the other upload files), upload it using Amazon's upload tool located on your Seller Account page then follow Amazon's instructions for uploading multiple items.

Tip: choose "Standard Book Loader" in the "Select Your File Type" field. (If you do not select "Standard Book Loader" your Amazon upload file will not load successfully).

7.7 Uploading selected items

BOOKHOUND AND THE WEB

At times, you may wish to override BookHound's automatic selection of records to upload. To do this, find your desired group of records using BookHound's *search* screen.

Once you are viewing the desired items in the *inventory list* screen, **click** the Records menu and choose UPLOADS --> FROM CURRENT LIST, then select the desired upload file name (a-books, b-books, c-books or amz). BookHound will create an upload file and save it in your "my_uploads" folder. You can now login to your online account and upload this file using your service's upload link.

Note: regular records queued for upload will be unaffected by this process and will be uploaded using the buttons on the *upload* screen.

8.1 Importing data (1)

IMPORTING & EXPORTING

Before importing records from another source be sure you have a valid *tab-delimited* (or tab-separated) text file and be aware of its field order (i.e., the sequence of the fields in your text file).

If your BookHound is currently empty of inventory records, **click** the orange INVENTORY or CUSTOMER button on the *home screen*. Then, from the Records menu choose EXPORT/IMPORT/ IMPORT INVENTORY (or CUSTOMERS).

In the resulting OPEN FILE window, locate the tab-delimited text file you have previously prepared, and click the file's name, then **click** the "open" button (or double-click the file name).

In the resulting *Import Field Mapping* screen you will see the data from the first record in your tab-delimited text file displayed at left (each field will be displayed vertically with the first field in the top position, field 2 in the second position beneath it, and so on). On the right are BookHound *field names* into which you will import your data shown at left of the screen.

Align the appropriate fields on the right with the data shown at left by dragging. **Click** between aligned fields to make sure a right-facing arrow is present (click again to remove the arrow to prevent importation into that field).

Click the IMPORT button at lower right of this screen.

In the next window, **check** the "perform auto-enter options…" box and **click** Ok. BookHound will import your data into the fields to which they were mapped.

8.1.1 Importing data (2)

IMPORTING & EXPORTING

When importing is finished, **reset** your next highest id number by **clicking** the RESET ITEM (or CUSTOMER) ID button on the *preferences* | *general* or *preferences* | *customers* screen and choose "highest" when prompted.

Note: you may also select "choose" and enter a new starting id number of your choosing; just make sure it is higher that any existing id number, otherwise the inevitable duplication of id numbers will occur.

8.2 Exporting

IMPORTING & EXPORTING

The records that will be exported from either the *inventory* file or the *customer* file will *always* be just those records in the current "found group" of records. Always perform a **search** for the desired records before exporting.

After you are satisfied with the "found group" in your list, **choose** "Export/Import"/ Export Inventory from the Records menu. From the resulting "Export Records to File" window **choose** a location on your hard drive and **name** the file to your liking.

Choose the export format you wish to use from the TYPE: drop-down field (tab-delimited for Macintosh; tab-separated for Windows) and **click** SAVE.

The fields that will be exported are shown in the next window at right. By default, the basic bibliographic fields will be exported. To export only desired fields, **click** the CLEAR ALL button at center of the screen.

Select "Current Table (Items)" from the drop-down menu at top left, then add the fields you wish to export from BookHound's list of fields in the left portion of this window by scrolling through the list and **double-clicking** the desired field. This will copy them to the right side.

Once your fields are listed on the right, you can reorder them by clicking on them and **dragging** up or down. Remove a particular field from your Export order by clicking on it to highlight it—then click the CLEAR button in the center of the window.

When you are satisfied with your export field order, click the EXPORT button at bottom right of the screen.

8.3 Exporting customer data

IMPORTING & EXPORTING

Once you have found the customers you wish to export **choose** EXPORT CUSTOMERS from the Records menu.

To export customer addresses, click the address button in the next window. Select "shipping" or "billing" in the next window to export only shipping (or billing) addresses.

You will then be prompted to name your export file and choose the type of file. Usually the default type of file, tab-separated (or tab-delimited) is sufficient for 3rd party processors such as a printer or postal service but you may select CSV as the *file type* if so directed.

Choose to save to your Desktop and **click** SAVE.

In the Specify Field Order for Export window which follows you can see the order of the fields that will be exported. Tip: make a note of the fields and their position in the order as it is helpful to the recipient of this file to know what the fields are and in what order they appear.

Click the EXPORT button at bottom right.

In a few moments your file will be created and saved in the location you specified.

You can now attach the file and email it to a 3rd-Party bulk email or newsletter service (such as ConstantContact™).

9.1 Adding a want

MANAGING WANTS

Click on the customer's WANTS button in the Sub Navigation Bar at top of a *customer screen*.

Click into the first available AUTHOR field and enter the wanted author. Add a TITLE and other distinguishing characteristics using the fields provided (author and title are required if you intend to upload the *want* but you may refine the *want* as much as possible to avoid unwanted notifications by listing services).

You can enter as many *wants* for a particular customer as you wish. Each time you enter a *want* a new row with blank fields will appear beneath the completed want.

If you prefer NOT to upload a particular *want*, change the UPLOAD field from "Yes" to "No."

Only those wants entered with a "Yes" in the UPLOAD field on the *customer want* screen will be available for upload from BookHound's *upload screen*.

Tip: To create a *bookseller* (i.e., your) *want*, add yourself as a new customer and follow the instructions for adding a *want* for a customer. In other words, treat yourself as you would a customer. Thus, you can track your own bookseller wants under your own name.

9.2 Uploading (and offloading) wants

MANAGING WANTS

From the *home* screen, **click** the blue UPLOADS button at bottom left. On the resulting *uploads screen*, **click** the gray "create add-wants-1.txt" button at bottom left of screen.

BookHound will create a *wants file* and save it to your "my_wants" folder in your BookHound 8 folder. The file is now ready for upload to Biblio.com or other online marketplaces that accept *want files*.

To remove a want from an online marketplace locate the customer with whom the want is associated. Click on the WANT button in the Sub Navigation Bar and change the

UPLOAD field for the want in question to "remove."

When you've set these wants to "remove" return to the *home screen* and **click** the blue UPLOADS button. Finally, **click** the "create delete-wants.txt" button in the *wants* row at bottom of screen. BookHound will create a *wants file* containing your *wants,* earmarked as removals.

To re-upload all your *wants* **click** the REPLACE ALL WANTS button on the wants row. BookHound will create a file of all your *wants* marked as "Yes" in their UPLOAD field.

9.3 Finding and printing wants

MANAGING WANTS

On the *customer search screen* use the KEYWORDS, AUTHOR|TITLE, or CUSTOMER fields under the section labeled, CUSTOMER WANTS. BookHound will display the list of customers that match your search request.

To print a list of *all* wants, use the REPORTS section of BookHound (see Reports).

10.1 Using the reports screen

REPORTS

To access BookHound’s report screen, **click** the REPORTS button at lower right of the *home screen*.

All reports include data only from *posted* invoices. If you have created invoices and not posted them, they will not be included in your reports.

To generate a report, **select** the desired report type in the CHOOSE A REPORT field.

Select start and end dates in the fields provided (some reports will require you enter a month and year instead) then **click** the blue VIEW REPORT button.

BookHound will display a preview of the report as it would appear when printed. To view subsequent pages of the report, if any, click the "forward" PAGE ICON at top left of screen.

To exit the preview or print your report, **click** the blue CONTINUE button at top right of the screen (depending on your operating system, this button may be at the *bottom* right). Clicking this button will prompt you to return to the reports screen (cancel) or print the report.

When you print some reports you will first be asked whether you want to print a detailed or summary version of the report. A detailed version will itemize your sold items whereas the summary version will provide totals only.

Whenever you are previewing a report in BookHound, the only way to exit and/or print the report is to click the blue CONTINUE button.

11.1 Preferences

PREFERENCES

This is where you can set your general company information, *auto-entry* data defaults and other preference information.

The BookHound preferences screens can be accessed by choosing Preferences from the GO menu at top of all screens. You can also access the *preferences* screen by clicking the PREFERENCES button at bottom right of the *home* screen.

For convenience, the BookHound preferences are organized by function, indicated by the appropriately-named buttons at the top of the screen. You can access each of these area-specific preferences by **clicking** the appropriately named button along the top.

11.2 General Preferences (1)

PREFERENCES

Enter your company name and contact info in the fields provided. This information will appear on your invoices and printouts. **Uncheck** the boxes next to each field to prevent the information from appearing (a preview will appear at right).

AUTO INSERT

The text you enter here will be inserted automatically into the field in which your cursor resides (on an inventory screen) when you **click** the INSERT button located at right of any inventory entry screen. This technique is useful for adding routine text to entries without having to type it over and over again.

IMAGE PATH

If you want an image to appear with your online listings you must first upload your images to some location on the Internet (often, this is your own e-commerce website). Then, **enter** the path to your online image directory.

For example, if your online images are stored in a folder named "images" enter http://www.domainname.com/images/ (always end your path string with a "/").

Then, when an inventory item has an image, **click** its WEB button on the Sub Navigation Bar and click the PLUS-SIGN button at right of its IMAGE PATH field; this will insert the full path of the image which will be included in your uploaded data. (Note: if you have a Bibliopolis-hosted website, there is no need to populate this image path field).

11.2.1 General Preferences (2)

PREFERENCES

TYPE

On a new item record, this value will be automatically entered in the TYPE field for every inventory record. Note: this field *is included* in upload files and is used by certain services, such as ABE, to further categorize your stock. For most items, you will simply ignore this field and leave the default value of "book".

SCREEN SIZE

If you wish to use a larger BookHound screen, change the SCREEN SIZE field from "normal" to "large" (changes will take place after relaunching BookHound). Tip: If you want to increase or reduce screen size at any time, click the small plus- or minus-sign symbols, respectively, at extreme lower left of any screen.

BACKUP DATA FILE EVERY

BookHound will prompt you to save a copy of your “Data” file after the number of launches in this field. (See Protecting your Database for safer backup methods).

RESET ITEM ID

Reset BookHound’s item id sequence by clicking the RESET ITEM ID button at right.

USE SUB-TOPICS

Select "Yes" if you want to used a tiered system of major and minor topics, otherwise leave at "No."

11.3 Customer preferences

PREFERENCES

CUSTOMER TYPE

Similar to item type, set this field to the type of customer you most often enter into BookHound.

LABEL TYPE

Change this field to match the style of your Avery labels when printing labels from your customer file.

STATEMENT FOOTER

Enter text you want to appear at the bottom of a customer statement. Customer statements are generated from the HISTORY section of a *customer* screen by clicking the PRINT CUSTOMER STATEMENT button.

RESET CUSTOMER ID

Reset BookHound’s customer id sequence by clicking the RESET CUSTOMER ID button at right.

11.4 Web preferences (1)

PREFERENCES

BookHound will automatically include your newly entered items in any (or all) of four possible upload files.

If you wish to prevent your new items from being automatically uploaded change each file’s respective OK TO UPLOAD? field to "No."

If you set these defaults to "No" you must then change this field for each item you want uploaded by changing its respective OK TO UPLOAD? field from "No" to "Yes." Once an item is set to "Yes" it will be included in the next upload file.

Conversely, if you leave these preferences at "Yes" you must locate each item you do *not* want uploaded and change each’s OK TO UPLOAD? field to “No."

Most often you will create only one upload file but you have the option of creating additional upload files (b-books, c-books) as you might wish to adjust the prices of each file by a percentage (managed on the upload screen), then send each file to their respective online listing service(s). Each upload file has its own yes/no default setting.

11.4.1 Web preferences (2)

PREFERENCES

INTERNET FIELD ORDER

The upload files exported by BookHound contain data from the fields on each *inventory screen* and are in a particular order, called the *upload field order*. Most online marketplaces need to know this field order before you upload your files.

Copy the BookHound *field order* by **clicking** the blue link COPY at top right of this screen. You can then start an e-mail to your online marketplace and use your computer's **paste** command to insert the field order information into the body of your message.

AMAZON DEFAULTS

Set the default Amazon Marketplace™ condition in the ITEM CONDITION CODE field. All newly entered items in BookHound will receive this code (the BookHound default is 2: Very Good). Be sure to change it on an individual inventory screen if the item condition differs from your default setting.

You may also set the defaults for whether you will allow expedited shipping or ship an item abroad. Change these settings on individual items as desired.

Note: Amazon Marketplace requires its own special upload file; thus, it is not necessary to alert Amazon of the *upload field order* for this file as BookHound's AMZ upload file is automatically understood by Amazon.

11.5 Invoice preferences (1)

PREFERENCES

Choose the "Short" option in the STYLE field to display only author and title as 2 lines on the invoice. This is the standard option as more items can appear on a single page of an invoice.

Choose the "Long" option if you want your invoices to include all the item's bibliographic data in presentation format.

Uncheck TURN OFF PACKING LIST PRINT OPTION if you want to be prompted to print a packing list along with your invoice.

SHIPPING/FIRST AND SHIPPING/EA

Amounts you enter here are used to calculate the shipping & handling charges on an invoice when you click the blue field label SHIPPING in the totals section of an invoice. Often, this amount needs to be adjusted on the invoice but it can be useful for estimating basic shipping charges.

SORT INVOICE ITEMS BY

The line-items on an invoice will be automatically sorted by the criterion chosen here. Leave at "none" to display invoice items as entered.

DISPLAY RESALE NUM and DISPLAY EID

Check/uncheck these fields' boxes to toggle the appearance (at the bottom of printed invoices) of your resale and employer identification number.

11.5.1 Invoice preferences (2)

PREFERENCES

INVOICE FOOTERS

Enter the text you want to appear at the bottom (footer) of unpaid and paid invoices in the fields provided. Due to space considerations, you may wish to print test invoices as you edit these boilerplates.

RESET INVOICE ID

Reset BookHound's invoice id sequence by clicking the RESET INVOICE ID button. When choosing your own id number, make sure it is greater than your highest existing id number.

EDIT TAX RATES

Click the EDIT TAX RATES button at top right to access the *tax rates* screen.

There are two default tax zones: "Local" and "Non-taxable." Change the "Local" tax rate to your local tax rate.

If you use multiple tax zones, enter new zones by clicking the ADD RATE button at top. Give the TAX ZONE a name and enter a tax rate associated with this zone.

Tip: When you enter new customers, the TAX ZONE field's drop-down menu will contain each of your new zones. When you select a zone, the associated tax rate will be entered. When you create a customer invoice this tax rate will be carried over into the totals section of the invoice (where you can manually edit it if desired).

11.6 Display Preferences

PREFERENCES

Your selections on this screen affect how your bibliographic entries appear in printed or copied lists and catalogs.

Most of the fields are self-explanatory and the BookHound defaults have been set to approximate the most customary appearance of a catalog listing.

The preview beneath the display fields will automatically update as you change these defaults.

Besides adjusting font and formatting, you can choose to display (or not to display) the item ID, PRICES, ISBN, and SUBJECT by toggling these respective yes/no fields.

12.1 Adding a consignor

CONSIGNMENTS & LOTS

Select CONSIGNORS from the Go menu at top of screen.

If you have not yet entered any consignors, a blank consignor list view screen will be displayed. Select NEW CONSIGNOR from the Actions menu. Tip: after you create your first consignor you can create new consignors by clicking the NEW button on any existing consignor screen.

Enter the Consignor's name, address and any special notes in the fields provided. Be sure to enter the percentage of the sale that the consignors will receive on sold items in the % TAKE field(s).

When you create a new consignor, a consignor code is generated. This is the code you will assign your consigned item when you enter it into your inventory file.

After entering into inventory a consigned item, click on the HISTORY button in the Sub Navigation Bar then select the appropriate consignor in the CONSIGNOR drop-down field at upper right. Note: all consignors created in the consignor file will automatically be displayed in this drop-down menu.

Next, enter the number of copies consigned in the CONSIGNED QTY field (enter at least 1 in this field). Repeat this process for all items for a particular consignor.

Important: Always create a consignor record first. Next, tag your inventory records by assigning the consignor to the record. Only then will a consignor sale be recorded on an invoice.

12.2 Managing consignment sales

CONSIGNMENTS & LOTS

When a consigned item is sold on an invoice, the consignor code will appear in blue at right of the line item. **Click** on this consignor code if you need to change the consignor or de-assign this sale from the consignor. Generally, the consignor code here is used as a visual indicator that a consigned item is being sold.

On the *consignor list* screen there are two numbers at left; the first in blue, the second in gold. The blue number indicates how many of these consignor's items are due for compensation (i.e., sold on an invoice), the gold number indicates how many are on temporary hold (i.e., sold but you are not yet planning compensation).

Click on a consignor with a blue number to reveal the *consignor history screen*. All items for this consignor that have been sold will be shown in a list with the word UNPAID at right (make sure the Unpaid choice is selected at top right of the list).

To *settle* the entire group of "Unpaid" items, click the blue SETTLE button at right. If you wish to remunerate only a selection of the "Unpaid" items, click on the drop-down field at right of the item indicating "Unpaid" and change it to "Hold" – only items designated "Unpaid" will be included in the settlement.

A preview screen showing an invoice containing the "Unpaid" items will be displayed. Click the blue CONTINUE button at top right.

A dialog window will appear with the choice to commit (or not) this invoice. If you click "No" you will be returned to the history screen and all "Unpaid" items will remain as such. If you click "Yes" the invoice will be printed and the consigned items previously listed as "Unpaid" will now be shown as "Paid" and will not be included in future settlements.

12.3 Recording purchases by lot

CONSIGNMENTS & LOTS

To enter a purchase of a “lot” you must first create a new Lot record.

From any screen select NEW LOT from the Actions menu at the top of your computer screen.

Enter the amount paid for this *lot* in the cost field at top left and provide a brief description of the purchase in the description field. Enter the desired vendor information in the fields provided in the lower portion of the screen.

Once you have entered your lot purchase you are now ready to earmark entered items as belonging to this *lot*.

When you add items from this *lot* into inventory, **click** the HISTORY button in the Sub Navigation Bar at top. Select the appropriate lot from the LOT NUMBER field (the drop-down values in this field will automatically be populated by the lots you entered on the lot screen). BookHound will then enter the cost you recorded for this lot in the LOT COST field.

This is a similar process to recording consignment sales: always create the lot first, then tag the inventory item using the respective lot number fields on the HISTORY section of the item.

Track your profit (or loss) for respective lot purchases by selecting "Lot report" from the CHOOSE A REPORT field on the *reports screen*.

13.1 Restoring damaged files (1)

PROTECTING YOUR DATABASE

In rare circumstances a computer freeze (or crash) may force BookHound to unexpectedly quit or exit.

If this occurs reboot (restart) your computer before attempting to relaunch BookHound. In most cases, a re-launch of BookHound (after rebooting from a crash) will cause BookHound to perform a consistency check as it begins to open. This will only take a few minutes, and you can use BookHound normally once you arrive at the start screen.

In rare instances, you might be notified that your “data” file is damaged and cannot be opened.

If you receive this message, exit BookHound immediately. You will now need to recover the damaged “data” file.

On a Windows computer, recover the damaged file by holding down the **Ctrl** and

Shift keys on your keyboard while double-clicking the BookHound application icon (or shortcut).

On a Macintosh, hold down the **option** and **command** keys while double-clicking the BookHound application icon (or alias).

Keep these keys depressed until you see the "open damaged file" dialog box, then release the keys.

13.2 Restoring damaged files (2)

PROTECTING YOUR DATABASE

In the next window locate the damaged “data” file (it will be inside your "BookHound 8" folder) and double-click it. BookHound will begin the recovery process which, depending on the size of your database and speed of your machine, may take several minutes.

When recovery is complete, **click** ok, then cancel the remaining “open damaged file” dialog box if any. Your repaired BookHound should now open normally.

An extremely rare occurrence is when BookHound is unable to recover a damaged file.

In this case, it may be an indication of real structural damage, perpetrated by a flawed operating system, third-party software conflicts, or just plain bad mojo.

Since you have been backing up regularly (!), the best solution in this case is to insert your backup disk and copy the “data” file from this disk back into your BookHound 8 folder. Choose to replace the damaged same-named file when prompted.

If you back up consistently, you will only lose the work done between your last back up and the time of the crash.

13.3 Technical support

PROTECTING YOUR DATABASE

Bibliopolis will provide free support for the first 30 days after purchase. Subsequent telephone support time will be billed in 30 minute increments.

Help with downloading, installation, and getting started will be supported free of charge.

14.1 Field Display

FAQ

Why are some fields displayed with dashed line?

Fields outlined with dashed lines indicate data that will not, under any circumstances, be included in upload files. Thus, these fields are safe to use for internal purposes only.

14.2 Invoice Line Items (1)

FAQ *Can I add line-items to an invoice that is already posted?*

Yes, however these items will not automatically have their inventory quantities deducted nor will they automatically be queued for inclusion in the next upload file since this is the function of the "post this invoice" button (which can only be clicked once). This distinction is indicated by the yellow OH (on hand) field at right of the new line-item’s price field. Click this numeral once to “post” the individual, newly added line-item; the numeral will change its color to blue, matching the other, already posted, line items.

14.3 Invoice Line Items (2)

FAQ *Why is the line-item on an invoice red?*

If the quantity you are invoicing is greater than the OH (on hand) quantity, the line item will turn red. This is an indicator to double-check your stock before completing the invoice. It is a warning only and you can continue to post the invoice normally.

14.4 Inventory Quantities

FAQ *Will an inventory item with a quantity less than zero be uploaded?*

An item’s quantity may drop to -1 if it is sold on an invoice when its *on hand* quantity was zero at the time the invoice was posted. To insure the item is not added to online stock (since some online marketplaces interpret non-zero quantities as additions to stock, BookHound will not include such items in upload files. To correct this situation, simply locate the item in inventory (Do a search for < 0 in the quantity field) and adjust the quantity to zero; the item will now be included in your next upload file, designated as a removal from stock.

14.5 Consignments (1)

FAQ *Why, on the list of sold consigned items for a particular consignor are some invoice numbers shown in red.*

Red invoice numbers indicate that the invoice on which this consigned item was sold has not yet been posted. You may still settle such consigned items but be aware that, because the invoice was not posted, the item’s quantities were not accordingly decremented. You may use this indication as a warning and choose to investigate why the invoice was not posted.

14.6 Consignments (2)

FAQ *Why, on the list of sold consigned items for a particular consignor are some* sold at *numbers shown in orange?*

Orange *sold at* numbers indicate that there is a balance due that is greater than zero for the invoice on which the consigned item was sold. You may still settle such consigned items but be aware that the item for which you are paying your consignor may not yet be fully paid for.

14.7 Formatting

FAQ *Do I need to use the condition and/or binding fields?*

No. If you prefer to use your own language (and placement of such language in the body of your bibliographic descriptions) you may leave these fields blank. Note, however, that Amazon requires a valid binding entry and most online services allow customers to constrain searches "by binding," an advantage which would no longer be available.