

# BookMine Basics Catalogues/Lists

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## Catalogues/Lists

**What is a catalogue or list?** A catalogue/list is a collection of stock items that can be manipulated as a group and recalled easily. For instance you might set up a catalogue that contains all the marked down stock items from the biography section; all the new arrivals in a certain period; or all the books on a particular subject. The combinations are endless. You may want to print a list of every item that you currently have more than 15 copies on hand.

The terms catalogue and list are used interchangeably in BookMine. The word **catalogue** has the connotation that it will be printed in hardcopy form. List does not have this connotation. List just refers to a grouping of items that may be used for printing a catalogue but may have other uses.

In fact you can use catalogues/lists for lots of reasons but most commonly catalogues or lists are set up so that you can manipulate groups of records easily and simply recall financial and other sales data relating to this grouping. Catalogues/Lists can be emailed, printed, output to Excel for sending to customers by email, in printed form, or uploading to your website. The number of ways of outputting and using catalogues or lists is long – and really only confined by your imagination! In a nutshell, catalogues/lists are the most powerful way to manage groups of inventory records.

Once you learn how to compile catalogues you are most of the way to handling all the tasks required to manage your data for marketing through BookMine, for sending items to your website and for sending them on-line to other third party Online Bookstores on the Internet.

In fact a special and very important catalogue called the **Standard Online Catalogue** is used to keep all your online records up to date. See **Online catalogues** for handling the output to your website and for any online bookstores you subscribe to.

## Creating a Catalogue – or adding records to an existing catalogue

Creating a catalogue is a simple process which requires only that you add records either singularly or as a group to a catalogue or list.

1. **Go to the main stock/inventory form and use the view/find function** to choose either a single record or a view (group) of records that you wish to add to the catalogue or list.
2. You will notice that in the lower left section of the stock form there is a grouping of buttons headed **Add/Delete from Catalogues and Lists** this is the section of the form that you will use and become familiar with as we make up a catalogue or list.
3. **To add a single item to a catalogue or list** make sure the stock item is showing on the stock/inventory form and click the Add to button (found in the Add/Delete from Catalogues and Lists section of the form as mentioned above).
4. A window asking you to **select the catalogue or list you wish to add to** will appear. At this point you can either add to an existing catalogue by choosing from one of the catalogues named in the drop down box or if you wish to create a new catalogue simply type the name of the new catalogue you wish to create into the box.

5. If you enter the name of a catalogue that is not in the dropdown box (that is you have chosen to create a new catalogue) a window will appear asking if you wish to **generate a new catalogue** having this name. If you wish to create a new catalogue click Yes or AltS.
6. **The new catalogue has now been created** and you can add more records by repeating the process just described.
7. It is **highly advisable to publish or lock the catalogue/list** you have just completed if you have finalised it. If the catalogue or list is still in draft form it is possible that you may wish to make changes but once it is finished it is important to publish or lock the catalogue. Publishing or Locking the catalogue/list prevents further changes being inadvertently made to it without explicitly unlocking it. This means you retain an accurate representation of what the catalogue had in it. Items that are invoiced from a locked catalogue retain the link, and financial reporting relating to the list will be accurate.
8. **To publish (ie lock) a catalogue/list** click on the Lock button in the main catalogue interface. Alternatively when outputting the catalogue/list you can publish (ie lock it) by clicking the button beside publish this catalogue in the Catalogue Specific Options section of the Confirm/Set Output Options form.

**Adding a group or view of records from stock/inventory** is very similar to adding a single record. Select the records you wish to add by using the view/find function on the main stock/inventory form. When you have the view of items you wish to add to the catalogue or list displayed on the stock form click View or Alt= to add all of the records in the view to the catalogue or list.

**Adding one catalogue/list to another.** Similar to adding a view of records to a catalogue/list it can also be very useful to add one existing catalogue/list to another which is either already existing or new. A good example of an occasion when adding one catalogue/list to another is useful is when adding a catalogue/list to the Standard Online catalogue prior to outputting a BoldInfo list attachment (see instructions on BoldInfo attachments for full details).

**To add one catalogue/list to another** from the main stock/inventory form click the **Add List button or AltI**. A window will appear asking that you **Select the Catalogue/List Source** from which records are to be selected or in other words the source. Choose the catalogue/list name from the dropdown box. A second window will appear asking you to Select the Catalogue to Add to (ie the destination). Select the name of the catalogue you wish to add the first catalogue to and the records will be added.

For example if you wish to add all of the records in a catalogue called Japan to the standard online catalogue you would

- Click add list/AltI on the main stock form
- Select Japan as the source from the dropdown list of catalogues/lists
- Choose Standard Online catalogue as the destination

## Removing items from Catalogues/Lists

Removing a single item from a catalogue can be easily done from either the main catalogue interface or just as easily from the main stock/inventory form. It is also a simple matter to remove a group or even all of the books in a catalogue using the main catalogue interface.

### How to Remove a Single Item from a Catalogue/List – Main Catalogue Interface

1. Go to the main catalogue interface form by clicking Catalogues/Lists (AltL) from the main switchboard.
2. Go to the record you wish to remove. Click Remove/AltM. (You will find the remove button in the Records section of the navigation buttons on this form - central lower section of the window).

### **Removing a Single Item from a Catalogue/List – Stock/Inventory Interface**

You can also remove a single item from a catalogue/list from the main stock/inventory form. Using the View/Find function/AltV go to the record you wish to remove and click Remove/AltM. This will remove this item from the catalogue.

### **Removing Groups of Items from a Catalogue/List**

1. Go to the main catalogue interface form by clicking Catalogues/Lists (AltL) from the main switchboard.
2. Call up the group of records you wish to remove from the catalogue/list using the View/Find/AltV function.
3. When the group of records you wish to remove is shown on the screen (note the number of items indicator on the bottom margin of the screen which is a good way of checking if you are still in the full catalogue or list or if you have a lesser number of items showing and thus you are in a view) click the Clear button and this will remove the items in this view from the catalogue/list.

### **Important Note on Removing Items from Catalogues/Lists**

If the item/s you wish to remove is in a catalogue that has already been published you will be warned before you carry out this action that by performing this removal you will be reactivating or unlocking the catalogue. It is very important that you do not do this lightly particularly if you have already sent this catalogue/list out as the history of this item being in this catalogue will be lost. This could lead to serious confustons and mistakes if this catalogue has been given out to customers.

### **Viewing Catalogues – Catalogue Central**

**Catalogues are most commonly viewed from either the stock form or from the main catalogue interface.**

- From the main Switchboard – Click the **Catalogues/List** button.
- From the main Stock or Contact interface Click the **Cat/Lists** button.
- On the main catalogue/list interface items can be removed from a catalogue, the total financial amount of one copy of each item in the invoice can be reviewed and a number of other actions can be performed. Viewing the catalogue through the main stock interface means that you are able to use all of the functions that you can usually access through this interface – for instance viewing a full history of all of the catalogues/lists that a particular stock item has been in, its previous sales etc however you will not be able to view financial totals etc. Both interfaces have their uses and commonly people use one or the other depending on their particular requirements at the time.

**Fig: The main Catalogue/List Maintenance Interface**

The screenshot shows the 'Standard Online Catalogue' interface. At the top, it displays 'Bookmine Enterprise V8 Licensed to Infomining Pty Ltd'. Below this, there are fields for 'Current Contact' (ContactId 95 KAREN ABBOTT, 45 STOCKMANS DRIVE) and 'Select Cat (F3)' (Standard Online Catalogue). A 'Refresh Display (F4)' button is also present. The interface is divided into several sections: 'Stock Details...' (On Hand 1, Adjust...), 'Section in this catalogue' (ASTROLOGY), 'Price in this catalogue' (17.95), and 'Status of item' (Status, StockID 327880, Withdraw, Refresh). The main entry details include Title (Astrology), Author (Harvey, Charles, Harvey, Suzi), Alternate (Colour Photos, Line Drawings), Publisher, Place (UK), Pub Date (2000), Binding (Paperback), Pages (96), and a Summary. At the bottom, there are navigation and action buttons for 'Catalogues', 'Requests/Requesters', 'Form Navigation', 'Records', and 'Invoices/Transactions'. Yellow callout boxes provide the following explanations:

- Display a catalogue. Select from the drop down list:** Points to the 'Select Cat (F3)' dropdown menu.
- Availability or Online status of this item:** Points to the 'Status' and 'Online?' checkboxes.
- Maintain a catalogue/list with this group of commands:** Points to the 'Catalogues' action buttons (Summary, Cat/List, Del Cat, Clear, Sec Order, Lock, Rename).
- Add to a request fro the current customer:** Points to the 'Requests/Requesters' action buttons (Requested By, Make, Reqs).
- Add this items to an invoice for the current customer. Show current active invoice for the current customer.** Points to the 'Invoices/Transactions' action buttons (Summary, Include in Active, Show Active).

## Outputting Catalogues

Now that you have your catalogue completed you will want to output it. You can output the catalogue/list in very many ways – in text directly into an email, in a text or word file for printing or attaching to an email, into Excel, into a CSV file etc, etc.

To output a catalogue you will need to go to the Output section of Bookmine. The only exception to this is if you wish to output directly a text file directly into an email which you do from within the email itself.

1. Choose **Output/F6** from the main switchboard.

2. This will take you to the **General Output section** of Bookmine (note the tabs along the top of the window indicating the different areas with the output section).
3. Navigate to the **Select an Output Format** dropdown box and choose the catalogue/list you wish to output. The choices available are those of the output formats that come with Bookmine or that you have created. These formats or templates can easily be modified by clicking Preview/Modify Output formats and making the required changes or additions.
4. Click the **Start Output** button.
5. Choose from the options on the **Confirm/Set Output options window** which will be shown following clicking on the Start Output button. In most cases you will probably not want to change these options but the choices are here to enable you to do so if required.
6. When you are happy with your choices click **Proceed with Output**
7. The **Windows navigation box** will be displayed. Choose where you would like the file to be stored on your system. Be aware that you will need to be able to retrieve this file easily so it is important to correctly name the file and put it into a central easily locatable folder.

## Standard Online Catalogue – Controlling your online listings

The Standard Online Catalogue is a unique catalogue. Your Standard Online Catalogue reflects the stock you have listed on your website and on any of the Online Bookstores if you subscribe to them (such as ABE, Alibris etc). In the exactly the same way that you can add or remove a single item or groups of items to other catalogues you add and remove items from the Standard Online Catalogue – see explanation **Creating a Catalogue – or adding records to an existing catalogue** and **Removing items from Catalogues/Lists**.

If you have a website the Standard Online catalogue is the catalogue you will use the most so to make it very quick there is also a shortcut to add an item online for sale. In the stock/inventory form simply go to the record you wish to add on-line and click **Add Online for Sale**. This will add this item to the queue for adding to your website the next time you Refresh Online catalogues. Refreshing Online catalogues is the equivalent of outputting the catalogue in the case of the Standard Online Bookstores. (See Refreshing/Uploading to Online Bookstores).