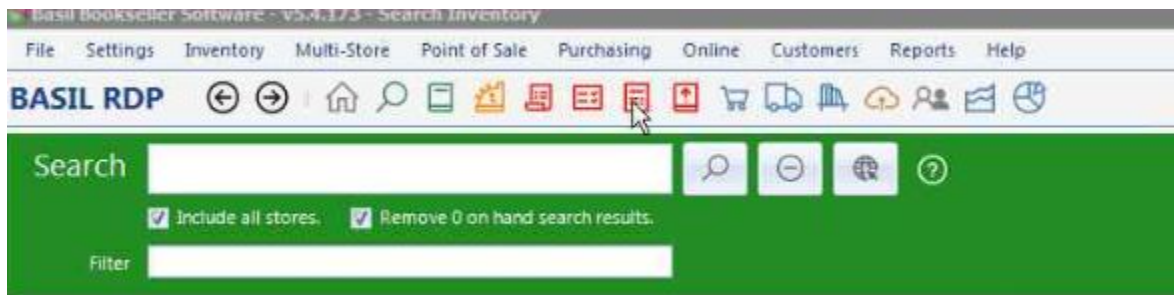# Receiving Quick Start

- Open a new receipt in Basil.
- In the **Vendor** field, enter the publisher's name.
- In the **Supplier Invoice Number** field, enter the invoice number from the packing slip.
- In the **Invoiced** field, enter the shipment date from the packing slip.
- Scan a book.
    - In the book details screen, enter the quantity of that title to be received, and make sure that the **Retail Price** and the **Store Price** match. Hit **ESC** to return to the receiving screen.
- Continue scanning until all books in the shipment have been received.
- Make sure that the overall **Retail Price** and **Store Price** match, and that the **Cost** field on the Basil receipt more or less matches the net amount due from the packing slip.
- Stamp the packing slip and write your initials, the date, and the receipt number.

General Receiving

- **Creating a New Receipt**
  To enter the receiving screen, click the **Receipts** icon. <mark>NOTE: Be sure not to use the Receipts-In-Progress icon.</mark>

  To create a new receipt, click **New Receipt**.

  This will open the receipt details screen.
  Enter the vendor's name (e.g. Penguin Random House, Simon and Schuster) in the **Vendor** field. This should auto-fill after a few characters.
  In the **Supplier Invoice Number** field, enter the invoice number from the packing slip, followed by your initials.
  Enter the date that the shipment was sent in the **Invoiced** field.

Once all the necessary fields have been filled in, move your cursor to the **ID** field, and begin scanning the books. After you scan, a new detail screen will appear. On this screen, you can confirm and adjust the price points of the book you've just scanned, as well as adjust the quantity of this title that you would like to receive.

- **Confirming Price Points**
  The book detail screen displays two price fields: the **Retail Price** and the **Store Price**. It's important that these amounts match. If they are mismatched, and you are not sure which price is the correct one, check the price on the invoice, or on the back of the book itself. This price is the one that should be used in both fields.

- **Large Quantities of the Same Title**
  In order to receive more than one copy of the same title, simply enter the quantity you would like to receive into the **Quantity field** of the book detail screen. Make sure that this quantity matches the **Qty** line of the **Purchase Order** box.


Once you have confirmed that the price points match, and that you are receiving the correct number of books, you can exit the detail screen by pressing **Enter** or clicking **Done**. The book you just scanned will appear in your **receiving grid**. You can now continue scanning the rest of the books in the shipment.

- **Adjusting Discounts**
  Sometimes, the default discount amount on the Basil receipt and the discount amount on the packing slip will not match. This can occur for an entire receipt, or on a book-by-book basis. When this happens, select the book or books that need adjusting, and click the **Cost Calculation** icon in the **Actions** section of the receipt screen.

Select **Percent** from the drop-down menu, and enter the discount amount from the packing slip in the **Value** field.
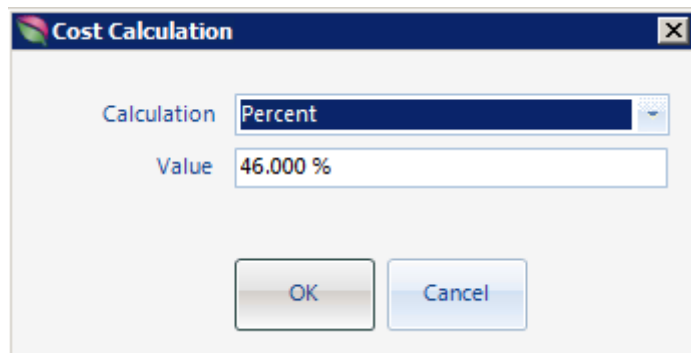
- **Shelving**
  Place the book on the back room receiving shelf, to the right of the corresponding section tag.

- **Closing a Receipt**
  Once you've scanned all the books in the shipment, make sure that the **Retail Price** and **Store Price** amounts on the receipt page match. If they don't, and you're sure you've entered all the amounts correctly on the details page, click the **Cost Calculation** icon and then immediately hit **OK**. This should refresh the amounts; sometimes Basil just needs a bit of a nudge.

  Another thing to check is that the **Cost** field more or less matches the net amount due from the packing slip. If it's off by under $1, and you're sure you've entered the discounts correctly, then it's fine. If it's off by a larger amount, double check to make sure all your discounts are correct.

  Lastly, make sure the **Quantity** on the Basil receipt matches the quantity from the packing slip. If it doesn't, that's an indication that you've overlooked a book, or that a book has been short-shipped.

  When you're sure that the receipt has been received correctly, stamp the packing slip with the RECEIVED stamp. Write your date and the initials on the appropriate lines of the stamp, and then write the receipt number. The receipt number can be found at the top left of the receiving screen.
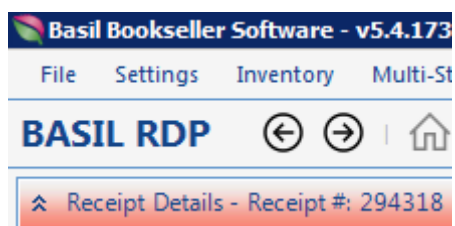
To exit the receiving screen, simply hit **Done** or **ESC**. ==**NOTE: Do not check the "Receipt is Complete" checkbox.**==
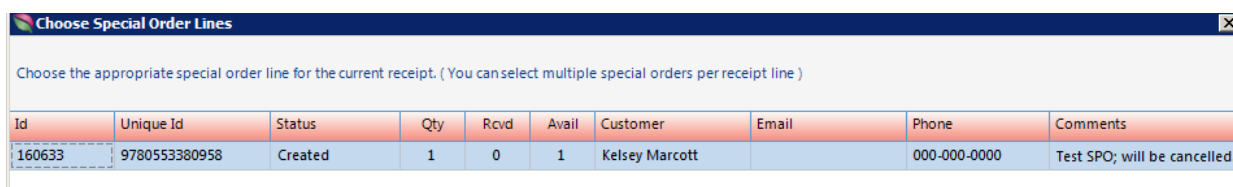
Receiving Street Dates

Often, publishers will require that a book not be sold before a certain date. These books are called **Street Dates** or **Strict on Sale.** Sometimes a box containing street dates will be marked with a sticker. Often, however, you'll have to look at a packing slip to see if the books are strict on sale. Each vendor marks street dates differently on their packing slips, so be on the lookout.

Receiving street dates is no different from receiving any other book in Basil. Once they've been received they should be rubber-banded to a small strip of paper displaying their section and the date they can be shelved.

Receiving Special Orders

While receiving, you will occasionally encounter special orders or **SPO**s. If a book is part of a special order, you will receive a pop-up prompting you to choose a line for a recipient. Usually, there is only one recipient. If there is more than one, choose the topmost one.

Continue with the rest of the receipt as usual, choosing recipients for SPOs as you encounter them. Before closing the receipt, select your entire receiving grid by clicking on a row and then pressing **CTRL-A**. Once you have everything selected, press **Email SPO**.
==**NOTE: If the SPO is street-dated, do not email the recipient. Print the SPO and put the print-out with the book on the Customer Street Dates shelf.**==

If there are SPOs for a recipient who doesn't have their email on file with us, you will get a pop-up alerting you that some recipients could not be emailed. These recipients will need to be called.
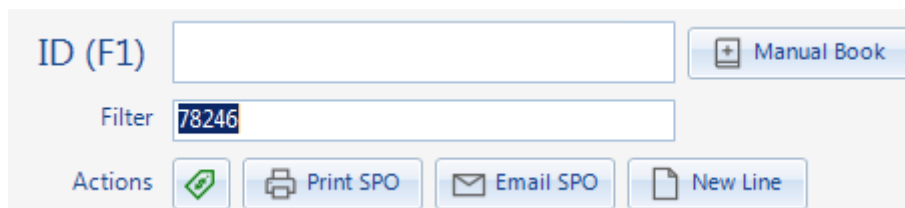

After you've dismissed this pop-up, press Print SPO. This will print information about each SPO, including customer contact information, and whether or not the book has been paid for. If the print-out indicates the book has been ==Paid-In-Full==, highlight this before contacting the recipient.

Receiving Short-Ships, Damages, and Other Issues

- **Short-Ships**

If you are one or two books short at the end of a receipt, this often means that a book has been **short-shipped**. This will take a little detective work. If you are missing a book which you should have received a single copy of, you'll have to go through the packing slip to find out which book was not included in the shipment. To make this a little easier, you can use the **Filter** field in Basil.
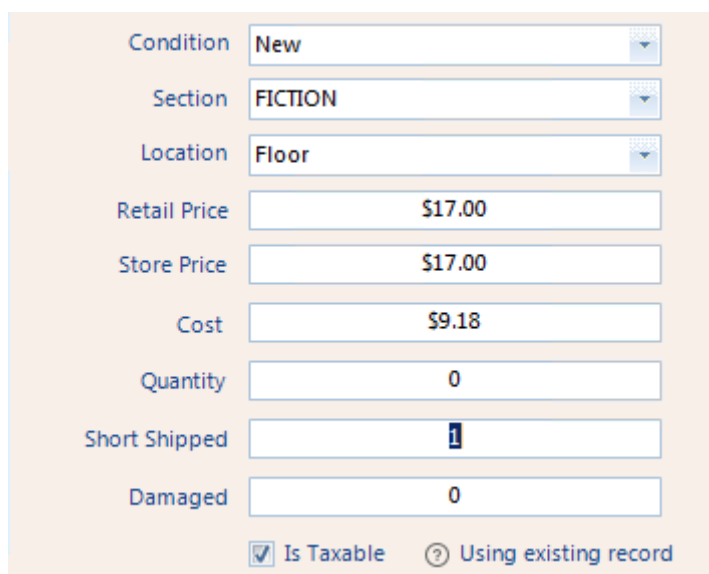

Enter the last 5 digits from the ISBN of each book on the packing slip into the **Filter** field until you find an ISBN for which no results are returned, or for which the quantity received does not match the quantity on the packing slip; this is your short-shipped book.

Single Copy Short Ships
Clear the Filter field and move your cursor to the **ID** field. Enter the full ISBN of the book that you are missing from the packing slip. On the book details screen, change **Quantity** to 0, and enter the number of books that should have been in the shipment in the **Short Shipped** field.

Multiple Copy Short Ships
Sometimes, you will be missing one or two copies of a title out of several that should have been shipped. In this case, click on the line with the short-shipped title in your receiving grid to open the book details screen. In the **Quantity** field, enter the number of books that you actually received. In the **Short Shipped** field, enter the number of books that were left out of the shipment. For example, if you should have been sent 5 copies of a title, but only received 4, then you will enter 4 in the Quantity field, and 1 in the Short Shipped field.

If your receipt involves short-ships, you must print a return document before closing the receiving screen. To do this, click **Receipt Actions**, then **Print Return (Damaged/Short).**
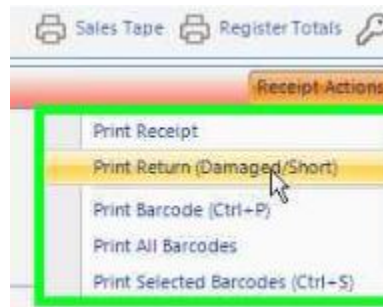
Click **Print** on the document that this generates, and staple this document to the original packing slip.
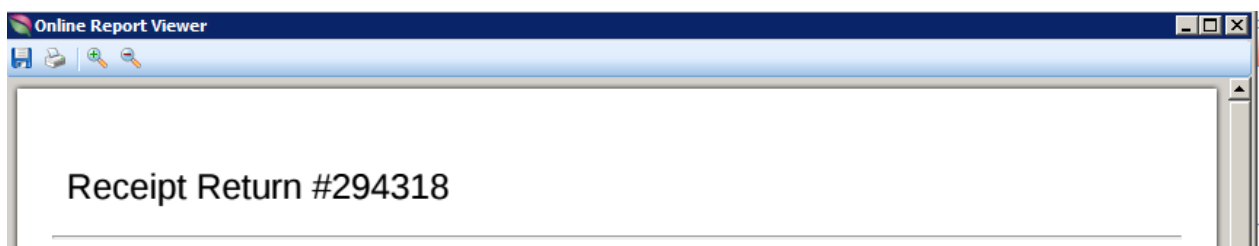
On the packing slip itself, find the line for the title that was short-shipped and highlight it. After stamping the document, write "1 ss" or "1 short-shipped," next to the receipt number and highlight this as well.

- **Damages**

The procedure for documenting damages is very similar to documenting short-ships. If you receive a book that is not in sellable condition, simply scan the book and change the **Quantity** to 0 (or, if there are multiple copies, the number of copies received that are in sellable condition). Then, enter the number of titles that were received damaged in the **Damaged** field.

Condition	New
Section	FICTION
Location	Floor
Retail Price	$17.00
Store Price	$17.00
Cost	$9.18
Quantity	0
Short Shipped	0
Damaged	1

☑ Is Taxable   ⑦ Using existing record

Before closing the receipt, print a return document. To do this, click **Receipt Actions**, **then Print Return (Damaged/Short)**. On the packing slip itself, find the line for the title that was damaged, and highlight it. After stamping the document, write "1 da" or "1 damaged," next to the receipt number, and highlight this as well.

When a title has been received damaged, the vendor must be notified in order to receive credit for the book. At the receiving station in the back room, there is a list of our vendors and their customer support phone numbers. When it is convenient, call the vendor for credit for the damaged book. Make sure that you have the invoice number, the ISBN of the book, and our account number with the vendor, if applicable (this can be found next to the vendor's phone number on the document at the receiving station.) Customer support will ask you if you would like a replacement for the book or credit. Always choose credit.

Once the vendor has been contacted, and credit has been issued, make a note on the return document that you generated earlier. Write "Vendor contacted, credit issued," then the date, and your initials, and file this with the rest of the receipts. Put the book on the ARCs shelf, in the box of a coworker that you know would just love it, in your backpack, or, if it's damaged beyond readability, or was sent by Harlequin, in the recycling.

- **Wrong Title Sent**

On rare occasions, a book that was not ordered will be sent instead of one that was. If the book that was sent is similar in price to the one that was ordered, simply receive the book that was sent. There is no need to document a short-ship. If the discrepancy is more substantial, the vendor may need to be contacted.

Receiving Checklist

1. Vendor field filled out?
2. Supplier Invoice Number field filled out?
3. Invoiced field filled out?
4. Do the quantities on the Basil receipt and on the packing slip match?
5. Do the Retail Price and Store Price match?
6. Does the Cost more or less match the net amount due on the packing slip?
7. Have you stamped the packing slip and made a note of the receipt number?
8. If there were damages or short ships:
   a. Have you generated a return document?
   b. Have you made a note of the issues on the packing slip?

Receiving Tips and Tricks

- If you feel confident in your ability to receive without the details screen, you can turn it off by going to **Settings/User Settings/Buy Back & Sales Settings** and checking the box that says "**Add scanned items directly to grid rather than showing the details screen**." You can always access the details screen by double-clicking a title, and you will still need to access the details screen if any issues arise with the receipt. However, adding titles directly to the receipt is faster than checking the details screen for every book.

- The order of the columns that you see on your receiving grid can be changed. If you would, for example, rather see the **Title** before the **PO#**, or if you would like **Store Price** and **Retail Price** next to each other, simply click the top of the column that you would like to move, and drag it to where you would like it to go.

Returns Quick Start

- Open a new return in Basil.
- Enter the publisher's name.
- Scan all books to be returned.
- Pack all books to be returned.
- Enter the number of boxes, number of books, and cumulative weight of all boxes in the **Notes** field.
- Hit **Mark as Returned.**
- Alphabetize the return by title.
- Print 3 copies of the return. Staple each copy and place them in a manila envelope.
- Sticker each box.

Returns

- **Creating a New Vendor Return**
  To begin a vendor return, click the **Returns** icon, then click **New Return**.
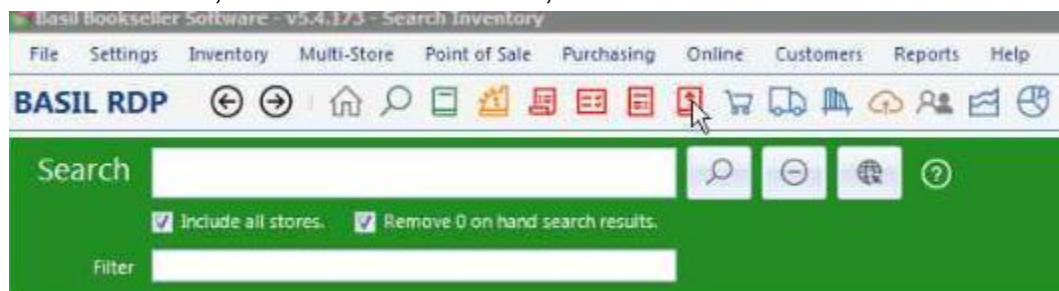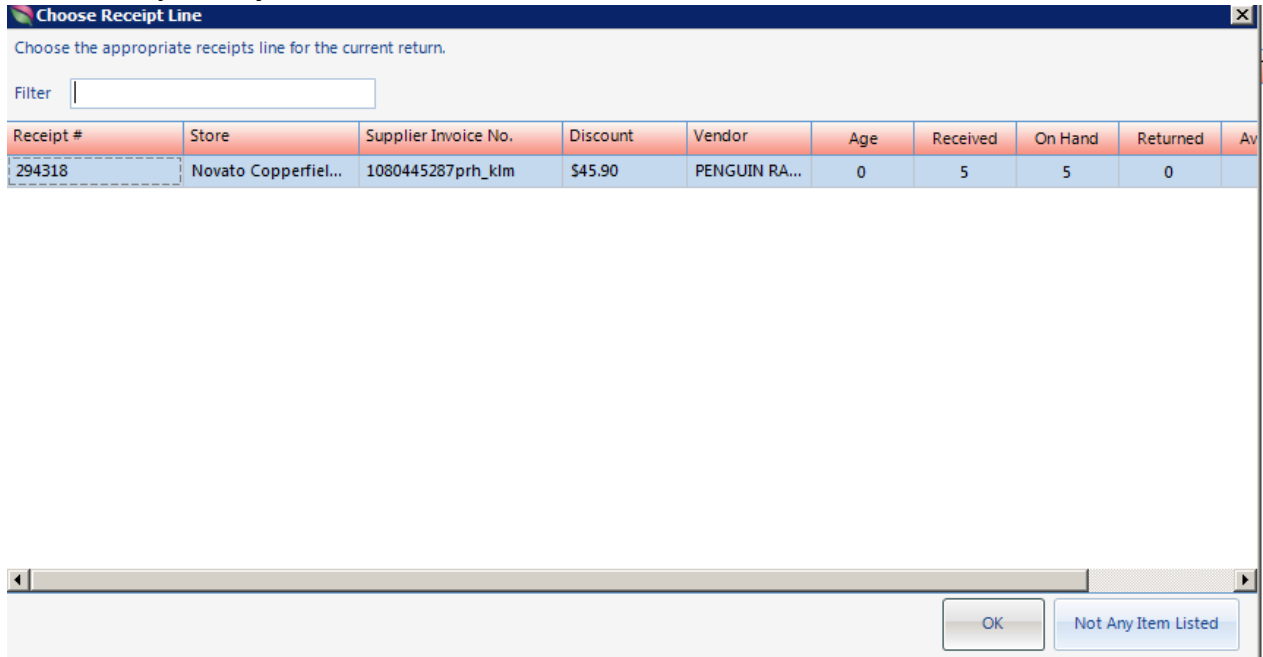
In the pop-up that follows, enter the vendor's name, and click **Continue.**

- **Entering Books Into a Return**
  Scan a book into the **ID** field. A pop-up will appear prompting you to choose a receipt line for the book that you've just scanned.

  Sometimes, there will be only one receipt line. Other times, there will be several. When you have a choice, choose the line closes to the bottom, with the lowest number in the **Age** column. This will populate your return grid with the scanned title.
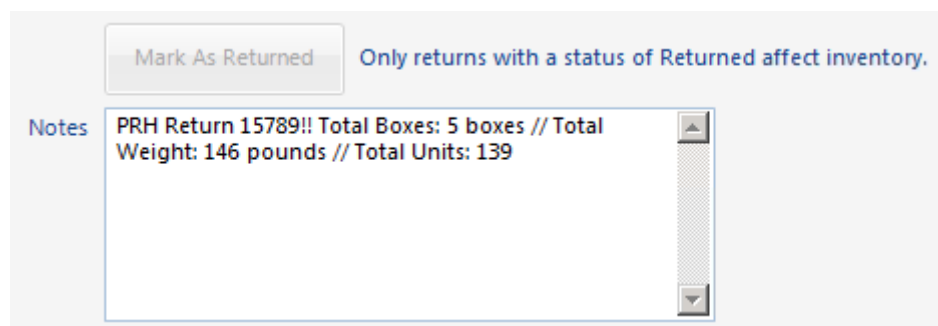
  To add more than one copy of a title, scan each copy individually, or hit **Enter** until all the copies to be returned have been entered. All copies of a title from a single receipt will occupy one line. A new line for an identical title is only added when all books originally received from the chosen receipt line have been returned.

- **Packing a Return**
  Once all the books have been scanned, stack them on the island in the back room. Turn on the scale, place a box on it, and start packing. **The weight of the box should not exceed 34 pounds.** Make a note of the box number and the weight in sharpie on the side of the box.

- **Closing a Return**
  When all the books have been found, scanned, and packed, click **Mark as Returned** on the return screen in Basil. This removes the scanned books from the inventory.

In the **Notes** field, indicate the return number, as well as how many boxes are included in the return, the quantity of books returned, and the cumulative weight of all boxes. The return number can be found in the top left of the return screen.

Return Details - Return #: 15789

Alphabetize the return by title. To do this, simply click the header of the **Author** column on your return grid.

Isbn	Title	Authors	To Return	On Hand
9781684057108	Alien Invasions! The Histor...		1	0
9780593135280	Humor, Seriously	Aaker, Jennifer,B...	1	0
9781984801197	Little Devil in America	Abdurraqib, Hanif	1	0
9781984806130	Crazy Stupid Bromance	Adams, Lyssa Kay	2	0
9780593139684	South Beach Diet	Agatston, Arthur	1	0

Once the return has been alphabetized, print 3 copies of the return. To do this, click on the three dots in the top right of the return screen, and select **Print Return**. Click **Print** in the pop-up that appears, and make sure to change the number of copies to 3.
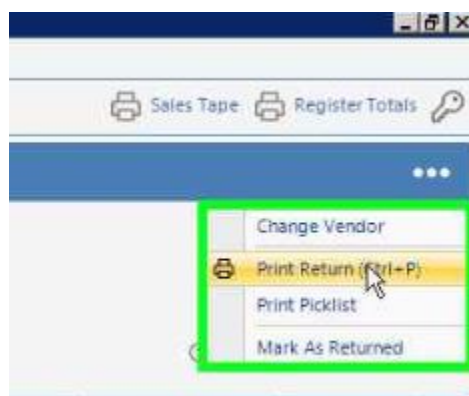
All three copies will go in a manila envelope addressed to the warehouse. Place the envelope on top of the stack of boxes.

Each box should also have a yellow multi-store sticker that specifies:
- That the boxes are being sent to the warehouse
- Where they are from
- The number of each individual box/Number of boxes total
- The publisher's name
- The return number
- The weight of the box rounded up to the nearest pound
- The date that the box was packed

To: Whs

From: Nov

¹/Total

Notes:

Publisher Name
Return Number

Box Weight
(round up to
   nearest pound)

Date: date boxed

Specials Enclosed ☐

Return Checklist

- All books scanned?
- All books packed?
- Marked as returned?
- Alphabetized by title?
- Total boxes, book quantity, and cumulative weight in **Notes**?
- 3 copies of return in manila envelope?
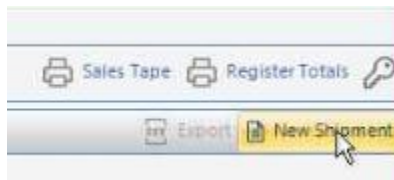- Each box stickered?
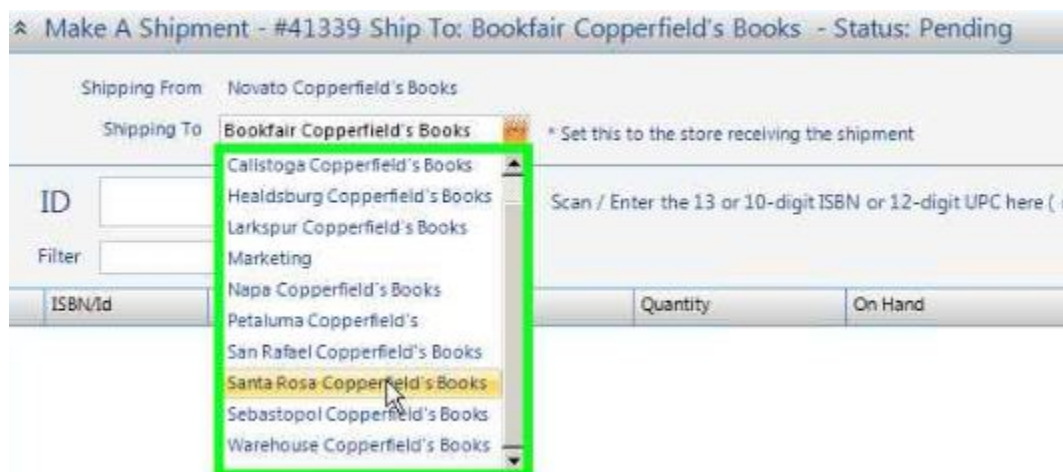
Multi-Store

- **Creating a New Multi-Store Shipment.**
  Click **Multi-Store** and select **Shipments** from the drop-down menu.
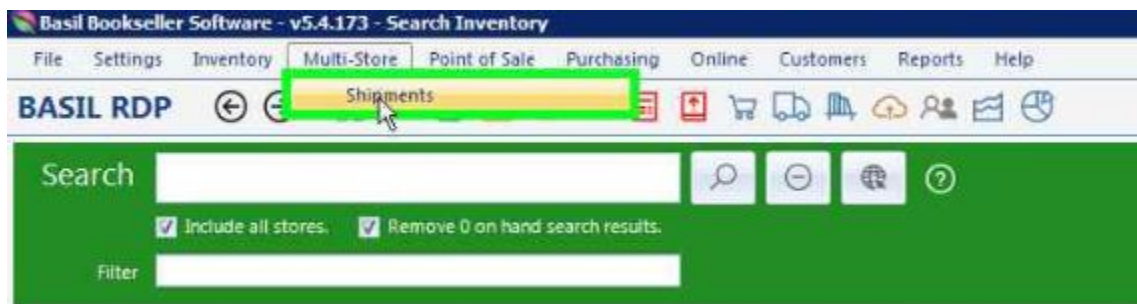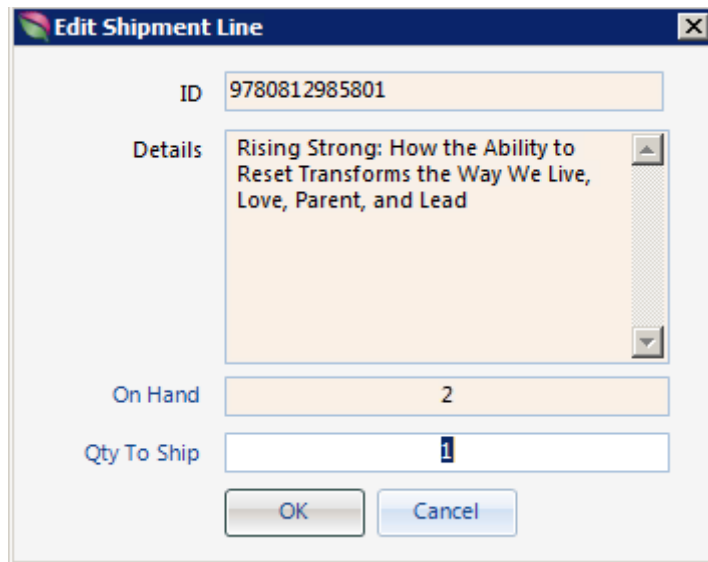
Click **New Shipment.**

In the shipment screen that follows, select the store that you want to ship to from the **Shipping To** field. <mark>NOTE: The Montgomery Village location will appear as Santa Rosa Copperfield's Books.</mark>

Scan the book you want to ship into the ID field. In the pop-up that follows, enter the number of items you want to ship in the **Qty To Ship** field.
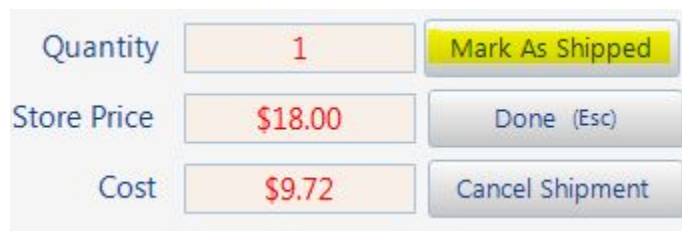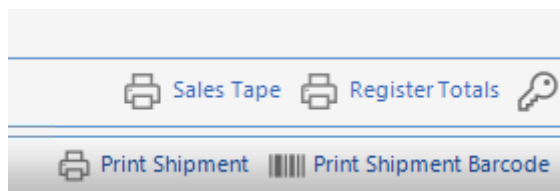
Click **Mark as Shipped.**

Click **Print Shipment** and print 1 copy of the multi-store shipment.

On the print-out, make a note of the recipient customer's name and phone number, as well as the shipment number. The shipment number can be found at the top left of the multi-store shipment screen.

Pack the book and the shipment document in a white magazine return bag, or in an appropriately sized box or bag from the recycling. Sticker the shipment with a multi-store sticker corresponding to the recipient store. These are:
- Grey – Novato (NOV)
- Orange – San Rafael (SRF)

- ○ White – Petaluma (PET)
- ○ Green – Sebastopol (SEB)
- ○ Blue – Montgomery Village (MV)
- ○ Yellow – Warehouse (WHS)
- ○ Red – Healdsburg (HBG)
- ○ Purple – Napa (NAPA)
- ○ Neon – Calistoga (CAL)
- ○ Pink – Larkspur (LKS)

Label the sticker with:
- ○ The receiving store's acronym
- ○ The sending store's acronym
- ○ The customer name and phone number
- ○ The shipment number
- ○ The date of shipment
- ○ Check the **Specials Enclosed** box

To: MV (make sure you have the right color)

From: Nov

Notes:

Customer Name

Customer Phone

Shipment Number

Date: date shipped

Specials Enclosed ☑

Place the package in the grey multi-store tote to the right of the back door.