E-Book Module Installation & Usage: RedShelf

Introduction to E-Books

E-Books

E-books are downloadable copies of books and other media that have only a minor physical presence in the store. Generally a store will have a stack of display cards that a customer can carry to the register if they wish to have an e-book rung up for them.

- E-books will nearly always be imported from the E-books Catalog, however you can manually enter them provided that you have all of the correct vendor information.

- In order to sell E-books in the Booklog CE Retail Module, you may need to purchase an E-book module for the Retail Module.

- E-books can be adopted through the Maintain Courses and Adoptions window or directly from the eBook to Adoption Comparison Report.

Important Facts About E-Books

- E-book items maintain no quantity on hand.

- E-book sales will not decrement quantity on hand.

- E-books use UPCs, not ISBNs, even though they are often digital copies of physical books with ISBNs.

- E-books will never have records for a used copy of the book. There is no such thing as a used e-book.

- Some vendors may take unused e-books in buyback. Ask your vendor about e-books during buyback.

- Booklog College Edition currently supports four e-book vendors: Brytwave/CafeScribe, RedShelf, Campus eBookstore, and VitalSource. New vendors are added as the opportunity to partner with them comes about.

- You can not use Avery labels for VitalSource e-books.If you plan on printing barcodes for VitalSource e-books, you must have a dedicated barcode printer. Alternately, use the EBook Scan Card Report.

Selling E-Books Online

- You may sell e-books through your online eCommerce website the way that you sell any other title, as long as your eCommerce site sends orders to Booklog's Mail Order module.

- If you have a Timber website, you have the additional option of activating the e-books through Timber. This option is called the Timber/ Ebook Interface.

Timber/Ebook Integration

The Timber/Ebook integration is optional. Even if you use a Timber website for your web orders, you do not need to use the Timber/Ebook integration to activate your e-books.

Neither Timber nor Booklog can process refunds for e-books activated through the Timber website. See https://timberforum.bookstorewebsoftware.com/thread/100/refunding-redshelf-e-books for more information, and contact Herkimer media if you have questions.

If you use the Timber/Ebook integration, notify purchasers that e-books purchased through the website can not be returned to the store.

Chart of Timber/Ebook Integration Features

Tasks	Without Timber/Ebook integration	With Timber/Ebook integration
Sell e-books through Booklog Cash Register	Generate PIN through Cash Register; PIN is on receipt	Generate PIN through Cash Register; PIN is on receipt
Refund e-books through Booklog Cash Register	Cancel PIN through Cash Register	Cancel PIN through Cash Register
Take e-book orders through Timber: Customer pays with credit card	Generate PIN through Mail Order module; PIN is on Mail Order Fulfillment Report	Customer gets email with activated e-book.
Refund e-books sold through Timber; Customer pays with credit card	Cancel PIN through Mail Order module	Use instructions from Timber Forum.
Take e-books orders through Timber: Customer pays with financial aid or other non-credit card payment type	Generate PIN through Mail Order module; PIN is on Mail Order Fulfillment Report	Generate PIN through Mail Order module; PIN is on Mail Order Fulfillment Report
Refund e-books sold through Timber: Customer pays with financial aid or other non-credit card payment type	Cancel PIN through Mail Order module	Cancel PIN through Mail Order module
Sell e-books on a non-Timber Mail Order	Generate PIN through Mail Order module; PIN is on Mail Order Fulfillment	Generate PIN through Mail Order module; PIN is on Mail Order Fulfillment

	Report	Report
Refund e-books on a non-Timber Mail Order	Cancel PIN through Mail Order module	Cancel PIN through Mail Order module

E-Book Module Configuration

The E-Book module allows you to sell downloadable content products such as e-books, audiobooks and videos. E-books, audiobooks and videos often have only a minor physical presence in the store. They might be identified by a stack of display cards or tokens that customers can carry to the register if they wish to purchase an e-book.

This document will explain how to set up and use RedShelf. Each vendor has its own requirements. If you are working with a different vendor, contact Booklog Technical Support for the appropriate documentation.

> IMPORTANT NOTE:
> Full vendor support for the e-books module as described in this document requires version 14.0 or higher of Booklog CE. Users below this version must update before proceeding with installation.

Setting Up Firewall Exceptions

Make sure that the following exceptions have been opened on your firewall:

23.92.21.119

97.107.129.69

66.175.211.174

34.196.10.62

34.206.13.124

35.171.101.186

35.169.7.198

54.85.154.96

redshelf.com

alphassl.com

akamai.com

Port: 443

Contacting RedShelf for Credentials

RedShelf requires three types of credentials:

- PIN request credentials that allow you to sell e-books.
- FTP credentials to download the catalog.
- Web Service User credentials to coordinate the catalog.

You will need all of them when you configure Booklog to use RedShelf e-books. Contact your RedShelf representative to ask for your credentials.

Configuring Booklog to Use E-Books

Follow these basic installation steps before moving on to configure the RedShelf vendor. Contact Booklog Technical Support if you do not have the E-Book and Redshelf access keys and encrypted keys.

1. Login to the Retail Module as "Admin."
2. Make sure you have entered your Store SAN under Maintenance | Store | Address.
    2.1. Select Maintenance | Store from the main menu.
    2.2. Type your store's Standard Address Number in to the Store SAN field.
    2.3. Click Save.
    2.4. Click Close to close the window.
3. Select Maintenance | Add Ins. The Add Ins Pick List will open.
4. Double click the eBook add in. The Add Ins Properties [eBook] window will open.
5. Booklog will give you two codes when you purchase the module.
    5.1. In the Access Key field, type or paste the unencrypted code.
    5.2. In the Encrypted Key field, type or paste your personalized encrypted key.
6. Uncheck the box for Log PIN Requests and Responses. This feature is only used for troubleshooting problems and will slow your transactions if left on.
7. Click OK to save your changes. The Add Ins Properties [eBook] window will close.
8. Double click the RedShelf add in. The Add Ins Properties [REDSH] window will open.
9. Booklog will give you two codes when you purchase the module.
    9.1. In the Access Key field, type or paste the unencrypted code.
    9.2. In the Encrypted Key field, type or paste your personalized encrypted key.
10. Type the ftp credentials provided by your RedShelf representative into the Username and Password fields.
11. Type "ftp.redshelf.com" (without the quotes) into the Server field.
12. Type 21 into the Port field.
13. Add the Web Services User and Web Service Password/Token that you received from your RedShelf representative.

14. Click <u>OK</u> to save your changes. The Add Ins Properties [REDSH] window will close.

15. Log out of Booklog and log back in.

16. Verify that the e-book vendor has been added to your database:

 16.1. Select Maintenance | Vendors from the main menu.

 16.2. Search for the RedShelf vendor record.

RedShelf Configuration

RedShelf provides unique URLs and passwords to each store that sells their titles. Ask your RedShelf representative for the following information:

- Store Network ID
- Password
- Authorize URL
- Void URL

 Your Authorize URL will look something like this:

 https://*yournamehere*.redshelf.com/api/transaction/authorize/

 Your Void URL will look something like this:

 https://*yournamehere*.redshelf.com/api/transaction/void/

 Before entering the URL's into Booklog, you will need to change the last character from a forward slash (/) to a question mark (?).

1. Select Maintenance | Vendors from the Main Menu.
2. Locate and select the RedShelf vendor record.
3. Click <u>View</u> to open the RedShelf vendor record. The vendor's Detail Update window will open.
4. Select the eBook tab.
5. Enter the Authorize URL that you received from RedShelf into the <u>Request PIN URL</u> field:

   The URL should end with "authorize?"(without the quotes.)

6. Enter the Void URL that you received from RedShelf into the <u>Refund PIN URL</u> field:

   The URL should end with "void?" (without the quotes.)

7. Ensure both URLs have been entered correctly, and that there are no trailing spaces before or after the URL.

8. Enter your store's branded redemption URL into the **Redeem URL** field. This will appear on receipts when customers purchase e-books. If your store does not have a branded URL, enter RedShelf's URL.

9. In the <u>Store Network ID</u> field, add your RedShelf network ID. This will correspond to your Store SAN.

10. In the <u>Password</u> line, add your RedShelf password. (Your RedShelf representative will be able to provide your password.)

11. Click <u>Save</u> to save your changes. You may now begin selling RedShelf e-books.

Register Components

Register Booklog files on <u>each</u> client computer. The SOCK_RSA_COM.bar file contains communication files for many different parts of Booklog.

1. Log into Windows as a local administrator.
2. Navigate to the Booklog directory with Windows Explorer.
   2.1. Click Start | Computer.
   2.1. A Windows Explorer window will open.
   2.2. Double click <u>Local Disk (C:)</u>.

   2.3. Double click the **C:\Blwin32** directory.

> **NOTE**
> If you have installed on a disk drive other than C:\ then you must navigate to that location instead to locate the Blwin32 directory.

3. Locate SOCK_RSA_COM.bat and **right** click it.
4. Select **Run as Administrator** from the context menu. If you do not have a Run as Administrator option, select Run.

Manually Register SFTP System Files

Booklog uses Secure File Transfer Protocol (SFTP) to transmit information to other companies such as Verba and RedShelf. If you originally installed Booklog CE from a

disk older than 11.0.409, you must manually register the system files used for SFTP.

1. Log into Windows as an administrative user.
2. Navigate to the Booklog directory with Windows Explorer.
    2.1. Click Start | Computer.
    2.1. A Windows Explorer window will open.
    2.2. Double click Local Disk (C:).

    2.3. Double click the **C:\Blwin32** directory.

> **NOTE**
> If you have installed on a disk drive other than C:\ then you must nav-
> igate to that location instead to locate the Blwin32 directory.

3. Right click on register_wod_dll.bat and select Run as Administrator from the con-
   text menu. If you do not have an option to run as administrator, just click Run.

   You should receive notification that the DllRegister Server succeeded.

4. Click OK to close each RegSvr32 window as it appears.
5. Restart Booklog and login.
6. Repeat these steps on any other client computers that will run End of Day Pro-
   cessing.

> **NOTE**
> If you have successfully registered the SFTP system files and correctly
> installed any software for your connection type, yet still receive error mes-
> sages when performing End of Day Processing, please contact Booklog
> Technical Support at (773) 275-4439 x260.

Establishing E-book Adoption Settings

Choose an e-book adoption setting, which controls the Req (required) field in
Maintain Courses and Adoptions. The value you select will be automatically loaded
into the Req field whenever you adopt e-books through the eBook to Adoption Com-
parison Report or through the Ebook tab.

If you adopt an e-book by typing or scanning it into the Maintain Courses and Adoptions windows, Booklog will not use this default.

1. Go to Maintenance | Store.
2. The Store Properties window will open.
3. Go to the Defaults tab.
4. In the Adoptions section, find the Ebook Adopt Type field.
5. Select an option from the pull-down.
6. Save your changes.

Establishing E-book Pricing Settings

When you download and localize most titles, Booklog loads the cost of the e-book into the Vendor List/ Vendor Cost field, then uses the pricing factor to calculate the Selling Price.

Agency-priced e-books are different. They load with a default price and cost. The selling price will not be processed through the pricing factor. If the item is agency priced, the Agency Priced checkbox will be checked.

To set your pricing, create an e-book pricing factor that matches your contract with the e-book vendor. If necessary, you can also set up a vendor discount so that newly localized e-books show the correct average cost and invoice cost.

Assign a Default Pricing Factor to E-Books

Ensure that your e-book pricing is correct by setting up a default pricing factor that matches your e-book contract. For example, you may have a markup of 10% on all e-books. Create a pricing factor with this markup, and assign it as the override pricing factor for the e-book item type.

1. Go to Maintenance | Store Group.
2. The Maintain Store Group Properties window will open.
3. Go to the Default Selling Departments tab.
4. Find the row for the Ebook item type.
5. Go to the Default Pricing Factor field.
6. Select a default pricing factor from the pull-down list. This pricing factor will be used whenever you localize or create e-books.
7. Save your changes.

Edit the E-Book Vendor Default Discount

The vendor default discount is used to calculate the Average Cost and Invoice Cost of newly localized items.

1. Open the vendor record for the e-book vendor.
1. Set the vendor to <u>Text</u>.
2. The Vendor Default Discount & Cost Estimates section will become active.
3. Enter a vendor default discount in the <u>New</u> field.
4. In the <u>Round To:</u> field, select Penny from the drop-down list.
5. In the <u>Direction:</u> field, select Nearest from the drop-down list.
6. Save your changes.

Load & Coordinate the RedShelf E-Book Catalog

The RedShelf *Catalog* is a list of e-book titles. When you load the catalog into Book-log, Booklog incorporates it into catalog tables. Once the catalog is loaded, you can localize individual e-books into your system.

RedShelf has two different ways of providing the catalog. One is restricted by term: you send a list of adopted titles to RedShelf and RedShelf provides a tailored catalog that only addresses the titles that are currently adopted. Load the catalog once a term and coordinate it weekly to ensure that your pricing remains up-to-date.

The other is not restricted, and is recommended by both RedShelf and Booklog. RedShelf sends you the entire catalog, including titles that are not currently adopted. Load the catalog once or twice a year, and coordinate it weekly to ensure that your pricing remains up-to-date. If you'd like to use this process, notify RedShelf by sending an email to bookstorehelp@redshelf.com. RedShelf will put the catalog in your folder on their FTP site.

Coordination compares existing Booklog prices and UPC's with the prices and UPC's in the RedShelf catalog. Booklog searches the catalog for your localized e-book titles, and makes a note if the price or UPC has changed since the time you localized the title. When you save the coordination screen, Booklog updates your records to match the RedShelf catalog.

- Imported items are added to the catalog tables and must be later localized.
- You will be automatically prompted to coordinate your existing e-book records each time you load a catalog.
- When you import new catalogs or coordinate an existing catalog, titles not found in the catalog will be automatically flagged for deletion.
- RedShelf e-books have fixed list prices set by the publisher that cannot be changed and are unaffected by your pricing factors.
- In Coordination, outdated UPC codes are moved to the Alternate SKU tab of the Item Properties window.
- You can load the files from RedShelf's FTP site, or you can receive them from RedShelf via email and load them from a location on your computer. The RedShelf FTP site is faster and more accurate.
- Loading the complete RedShelf catalog may take up to two hours.
- The About Booklog window (found under Help | About) will show you when the RedShelf catalog was last updated.

Load the E-Book Catalog from the FTP Site

Load the e-book catalog from the RedShelf FTP site if possible.

1. In the Text Managment module, select File | Import | eBook Catalog and Coordinate from the main menu. In the retail module, go to File | Import | eBook Catalog.
2. You will be prompted to select an e-book vendor. Select RedShelf.
3. The RedShelf Booklist Import window will open.
4. To load the entire catalog, check Download Full Catalog.

   -or-

   To load a catalog for a specific term, choose the Campus and Term that will use this catalog.
5. Choose a Retrieve Method of FTP.
6. Click the Import button.
7. Booklog will automatically connect to RedShelf's FTP site and will pull down the new catalog.
8. If you are loading the entire catalog, the load will take an hour or more.
   8.1. The catalog is loaded row by row. If there is an error in one row, choose to continue with the load. All of the rest of the e-books in the catalog will be added to Booklog.
9. Once the load is done, the Load eBook Catalog window opens.
10. Continue with coordination of existing local e-book titles. Alternatively, you can close the window without coordinating - this will not affect the catalog you just updated.
    10.1. If an item's price has changed, the New Retail field will be highlighted in pink.
    10.2. If an item is no longer in the catalog, it will be highlighted in gray and flagged for deletion.
    10.3. Items with a changed UPC code will not be highlighted.
    10.4. Click the DEL box to remove any active item you do not want added to the catalog. To clear the deletion, press the Undelete All button.
    10.5. Do not make any other changes to the Coordination window.
11. The imported e-book titles will now appear on the Item Search Window in green text. They can be localized just like titles from a wholesaler Buying Guide.

    Use the eBook to Adoption Comparison report to locate adopted titles that have an available e-book version, and to adopt them directly from the report. The eBook to Adoption Comparison report can be accessed via the Reports Pick List.

Load the E-Book Catalog from a File Import

If you can not load the catalog from the RedShelf FTP site, ask RedShelf for an import-able catalog file.

1. In the Text Managment module, select File | Import | eBook Catalog and Coordinate from the main menu. In the retail module, go to File | Import | eBook Catalog.
2. You will be prompted to select an e-book vendor. Select RedShelf.
3. The RedShelf Booklist Import window will open.
4. To load the entire catalog, check <u>Download Full Catalog</u>.

   -or-

   To load a catalog for a specific term, choose the <u>Campus</u> and <u>Term</u> that will use this catalog.
5. Choose a <u>Retrieve Method</u> of File Import.
6. The Select an Ebook Catalog Import File window will open.
7. Navigate to the directory where you saved the catalog import file.
8. Select the file and click <u>Open</u>.
9. If you are loading the entire catalog, the load will take an hour or more.
   9.1. The catalog is loaded row by row. If there is an error in one row, choose to continue with the load. All of the rest of the e-books in the catalog will be added to Booklog.
10. Once the load is done, the Load eBook Catalog window opens.
11. Continue with coordination of existing local e-book titles. Alternatively, you can close the window without coordinating - this will not affect the catalog you just updated.
    11.1. If an item's price has changed, the <u>New Retail</u> field will be highlighted in pink.
    11.2. If an item is no longer in the catalog, it will be highlighted in gray and flagged for deletion.
    11.3. Items with a changed UPC code will not be highlighted.
    11.4. Click the <u>DEL</u> box to remove any active item you do not want added to the catalog. To clear the deletion, press the <u>Undelete All</u> button.
    11.5. Do not make any other changes to the Coordination window.
    11.6. Click <u>Save</u> to coordinate your local e-book titles.
12. The imported e-book titles will now appear on the Item Search Window in green text. They can be localized just like titles from a wholesaler Buying Guide.

Use the eBook to Adoption Comparison report to locate adopted titles that have an available e-book version, and to adopt them directly from the report. The eBook to Adoption Comparison report can be accessed via the Reports Pick List.
(See **eBook to Adoption Comparison** on page 28)

Coordinate the E-Book Catalog

RedShelf periodically changes e-book prices and UPC's. To ensure that your prices and UPC codes are accurate, regularly coordinate your e-books with the e-book catalog.

1. In the Text Managment module, select File | Import | eBook Catalog and Coordinate from the main menu. In the retail module, go to File | Import | eBook Catalog.

2. You will be prompted to select an e-book vendor. Select RedShelf Coordinate Only.

3. The Load eBook Catalog window will open.

   3.1. If an item's price has changed, the New Retail field will be highlighted in pink.

   3.2. If an item is no longer in the catalog, it will be highlighted in gray and flagged for deletion.

   3.3. Items with a changed UPC code will not be highlighted.

4. The Current Adoptions portion of the window shows all of the sections that a title is adopted to. Click on a title to see its adoptions.

5. The Hide Deleted button allows you to hide items scheduled to be deleted, so you can focus on items that are still in the catalog. Hidden items will be revealed and deleted when you save changes to the window.

6. Click the DEL box to remove any active item you do not want added to the catalog. To clear deletion of active items, press the Undelete All button.

7. Click Save to complete the coordination.

8. If any titles were deleted, you will be asked if you want to print the deletion report.

9. Click Yes to print the report.

> ### WHY DOES THE WINDOW DELETE ITEMS THAT ARE NO LONGER IN THE CATALOG?
> You are not allowed to sell e-books that are not part of the most current catalog. Use the Ebook Coordination Deletion report to update your adoptions records.
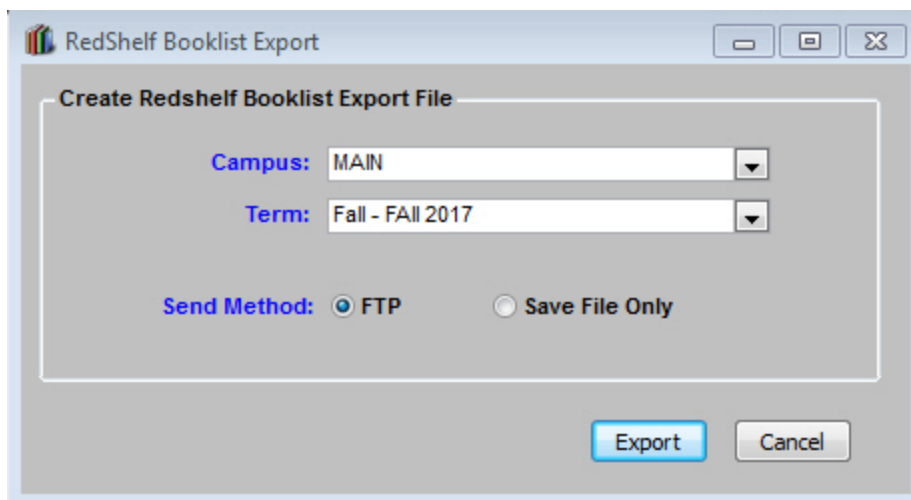
Send a Booklist to RedShelf

Most stores download the entire RedShelf catalog and then adopt e-book titles through one of the various adoption methods. This method is preferable because you can simply adopt new e-books as you receive adoptions from instructions.

However, you can also ask RedShelf to generate targeted catalogs for each of your terms. This helps speed up the catalog load process To do this, RedShelf requires a list of books adopted to your upcoming terms.

You can transmit the file to RedShelf via FTP (recommended) or by email. RedShelf prefers the FTP transmission because it is faster and less prone to error.

1. Log into Booklog's Text Management module.
2. Go to File | Export | RedShelf Booklist Export.
3. The RedShelf Booklist Export window will open.

4. Select the Campus and Term that you want to export.
5. Select a Send Method.
6. Click the Export button.
7. You will get a message that the file has been saved to your Booklog directory.
8. If you sent the files via FTP, you do not need to do anything more.
9. If you chose Save File Only, find the file and email it to your RedShelf representative.

RedShelf will generate your catalog from this file. Generally, the FTP site takes a day to create a catalog. Once a day passes, you can download your catalog from the FTP site.

Add E-Books to Booklog

There are many possible ways to add e-books to Booklog. You will see best results if you localize your e-books from a catalog, rather than entering the titles manually.

Permitted for RedShelf:

- Localize e-books through the Item Search window.
- Localize and adopt e-books through the Maintain Courses & Adoptions window's Ebook tab.
- Localize and adopt e-books through the eBook to Adoption Comparison report.

Localize E-Book Items

Localize e-books one at a time through the Item Search Window. You may also localize e-books through the Ebook tab of the Maintain Courses & Adoptions window.

- The ISBN field in the Item Search window will search all of an item's e-book identifiers, including Digital ISBN and Print ISBN.

1. Open the Item Search Window.
2. Uncheck Local Items Only.
3. Enter your search criteria (title, UPC, etc) and click Find Now. E-book records from the e-book catalog will be displayed in the Search Results pane in green text.
4. Select your e-book item and click View or double click.
5. You will be prompted to add the item to the local inventory, click Yes.
6. Save the item. **Do Not** make any changes to the vendor, or the e-book will not properly process in your register!

Manually Enter E-Book Items

Manual entry of e-books allows you to sell the e-books, but not coordinate them. Manually enter e-books only when you need to sell them immediately and there is no other way to add them to your system.

E-books that are manually entered will not connect with the physical, adopted title, as the related physical ISBN is not a visible field in Booklog. It's only available if the title is loaded from a catalog.

Likewise, e-books that are manually entered will not be coordinated, as they have no physical ISBN or duration. This means that you will not be able to update their prices automatically.

Because e-book UPC codes are so long, always manually enter e-books into Booklog's Retail module. Then, move to the Text Management module and assimilate the e-book as a text book.

Some e-books' UPC codes may be too long to enter into even the Retail module. In that case, you can not manually enter the e-books. The only way to add them is through the catalog.

Once the e-book is assimilated, make sure to check the book properties for the following:

- The Type must be set to eBook.

- The Identifier must be the **UPC** used by the vendor.

- The Imprint **and** Order From values must be set to the e-book vendor.

> **WARNING**
> Do not use the eBook item type if the e-book item does not authenticate through Booklog! You will encounter errors at the register when Booklog reaches out to the e-book vendor's server to authorize an e-book that does not exist there!

The Ebook Tab in Maintain Courses & Adoptions

The Ebook tab in Maintain Courses & Adoptions lets you immediately adopt e-books.

Adoption for a Specific Print ISBN

When you select an adopted item and open the Ebook tab, the tab will populate with a list of every e-book that corresponds with the print book. Some print books will have five or more unique e-books associated with them, because each e-book will have a different time period when it is valid. For example, a single print book might be associated with a 30-day e-book, a 60 day e-book, a 90-day e-book, a 120-day e-book, and an e-book with a "lifetime" or "perpetual" time frame. Each e-book will be priced differently.

1. Open the Maintain Courses & Adoptions window.

2. Highlight an adopted item.

3. Click on the Ebook tab.

3.1. If there are not any e-books in your system that match this title, you will get the message "No ebook data available for this title at this time".

3.2. If the item is an e-book, you will get a message reminding you that it is an e-book.

3.3. If there are any e-books in your system that match this title, you will see them listed in the tab. Titles that have already been localized into your system will be highlighted in orange.

4. Click on the Adopt button next to a row.

5. The e-book will be adopted to the section. The Req field will be set to the value you selected in the Store Properties window.

Adoption Without a Print ISBN

Use the Ebook Tab's Search Identifier field to find e-books without first adopting the print title. It searches the catalog and also pulls localized titles.

1. Open the Maintain Courses & Adoptions window.

2. Put your cursor in a blank row in the Adopted Items section of the Maintain Courses and Adoptions window.

3. Enter a print ISBN, digital ISBN, or UPC into the Search Identifier field.

4. Press the Search button, which looks like a green magnifying glass.

5. All e-books associated with the identifier will appear in the lower part of the tab.

6. Click on the Adopt button next to a row.

7. The e-book will be adopted to the section. The Req field will be set to the value you selected in the Store Properties window.

Sell E-Book Items in the Cash Register

E-books are sold just like regular items at the register. Note that you can only sell items in Booklog College Edition if you have purchased the Retail Module.

Selling E-Books

Scan the card or token for your e-book item into the register just like a regular item. You may also manually type the UPC, or use the Inventory Search window to locate the e-book item.

Each vendor will have its own procedures for capturing the e-book authorization and printing the receipt:

- Brytewave, RedShelf and VitalSource receipts will display both a redemption code (PIN) and a URL for the customer to redeem the book.

How Does the Cash Register Know to Sell an Item as an E-Book?

Booklog identifies e-books using two fields in the inventory record. The first is the e-book flag. In the Retail module, it is found on the Miscellaneous tab of Item Properties. In the Text Management module, it's found on the Title Detail tab of the Item Maintenance window.

The e-book flag triggers Booklog to look for an e-book vendor in the Vendor or Order From field. The Vendor will tell Booklog which URL to hit when it asks for the redemption code.

Sell E-Book Items in Mail Orders

There are two ways to sell e-books through the Mail Order module. In the first way, e-books are sold just like regular items in Mail Orders. Process your mail order as you normally would. Just like the cash register, the Mail Order module uses the e-book flag and the vendor information to obtain a redemption PIN.

The e-book redemption code (PIN) and redemption URL appear on the Mail Order Fulfillment Report and the receipt.

The second way requires setup with a Timber website and the Timber/Ebook integration module.

Using the Timber/Ebook Integration Module, Timber activates the book for students immediately. Students receive an email with the activated e-book from a Timber web site as soon as the order is processed and the credit card has been authorized. (Orders that are not paid for with a credit card - such as financial aid orders - can not be activated through Timber.)

Timber transmits a placeholder to Booklog, which stores the information with the mail order. When you process the mail order and collect payment, Booklog moves the placeholder to the e-book tables. The placeholder will appear on all reports in place of the redemption PIN.

- Students who pay with credit cards have immediate access to their e-books and do not need to activate them with a PIN.
- Students who pay with financial aid do not have immediate access to their e-books. You must process the e-books through the Booklog Mail Order module.

Consult Herkimer Media at info@bookstorewebsoftware.com for more information about the Timber/Ebook interface.

Refund and Void E-Book Transactions

E-books can be refunded or voided if you sell the wrong one or the customer changes their mind about the purchase. Performing the refund or void will invalidate the customer's PIN.

Refunding Through Quick Return

Quick Return is the best way to refund e-books because it pulls the PIN and the transaction number automatically. There is no possibility that you will mis-type the PIN or the transaction number.

- E-books sold through a Mail Order must be returned through the same mail order. See Refunding E-Book Transactions in Mail Orders for instructions.

1. Login to the Retail module.
2. Click the Register icon to open the Cash Register window.

3. The Cash Register window will open.
4. Click the Quick Return icon.

5. The Scan Receipt window will open.
    5.1. Scan the barcode on the customer receipt.

    -or-

    5.1. Locate the **Trns. #** on the receipt.
    5.2. Type the number into the Transaction # field.
6. Click OK. The register window will be populated with the items on the receipt.
7. Delete any items not being returned.
8. Click Process.
9. The Payment window will open.
10. Click the button for your desired refund tender.
11. The Enter Amount for Payment type window will open.
12. Click Plug-In Total or type an amount into the $ field. If you type an amount, click the -/+ button to make the amount negative.
13. Press Enter or click Process to process the payment.

14. Pay the customer back their cash if the refund is tendered in cash. If the customer prefers refund to a credit card, campus card or Financial Aid, follow the instructions for performing refunds provided with those interfaces.

Refunding with the Ref Checkbox

It's possible to refund e-books by checking the Ref checkbox in the cash register. However, you should be very cautious when using this method.

You will be prompted to enter a PIN and transaction number. **The PIN and transaction number you enter must be accurate, and must be copied off the original receipt.** If they are not accurate, you will not void the correct PIN.

- If you enter the correct PIN but an invalid transaction number, Booklog will process the transaction but the PIN will not be voided. In most cases, you will receive a message saying that the transaction number and PIN do not match. However, if you type a number that is *smaller than your smallest transaction number* (for example, you enter the number 1), you will not get a warning. The transaction will process without error, but the PIN will not be voided. Entering an invalid transaction number is as easy as skipping a number when typing in the number.
- If the customer purchased more than one e-book in the same transaction, it's possible to enter the PIN of a different e-book purchased in the same transaction. In this case, the wrong e-book would be refunded. Again, there is not warning that the expected PIN was not voided, and that an unexpected PIN was voided.
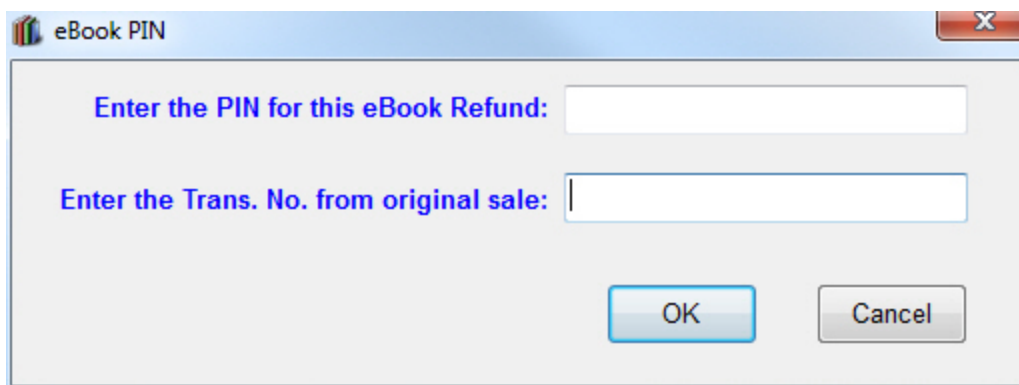
> **NOTE:**
> Refund e-books with the Ref checkbox at your own risk. If you fail to void a PIN, or if you void the wrong PIN, you must call the vendor and ask them to void the PIN. If you are unsure whether the PIN was voided, call the vendor.

1. Login to the Retail module.
2. Click the Register icon to open the Cash Register window.

3. The Cash Register window will open.
4. Scan the e-book into the register.
5. Click the Ref checkbox.
6. The eBook PIN window will open.

7. Enter the PIN from the receipt.

8. Enter the transaction number from the receipt.

9. Double-check both numbers! If the numbers are not accurate, it's possible to refund money without voiding the PIN. There is no way to track the voided PIN in Booklog.

10. Click Process. Click Process.

11. The Payment window will open.

12. Click the button for your desired refund tender.

13. The Enter Amount for Payment type window will open.

14. Click Plug-In Total or type an amount into the $ field. If you type an amount, click the -/+ button to make the amount negative.

15. Press Enter or click Process to process the payment.

16. Pay the customer back their cash if the refund is tendered in cash. If the customer prefers refund to a credit card, campus card or Financial Aid, follow the instructions for performing refunds provided with those interfaces.

Refunding E-Book Transactions in Mail Orders

Refunding e-books through the Mail Order window is similar to refunding them through the Quick Return icon. Booklog pulls the PIN and transaction number, so you do not need to type them.

1. If you use the Timber/Ebook interface module, check to see if the e-book was activated through Timber before attempting to process the refund in Booklog.

    1.1. Look at the receipt or the Mail Order Fulfillment Report. If you do not have a copy in front of you, run the report in Booklog.

    1.2. Each e-book will have a PIN. If the PIN is "INET_SOURCED" (for "Internet Sourced"), you may not return this e-book through Booklog.

Item #	Location	Qty	Cond	Prior	Ship	B/O	Author	Title	Unit Price	Total
129861848640361		1	New	0	1	0	Kimberly Van Meter	Sworn To Protect	$9.40	$9.40
	URL:						PIN:	INET_SOURCED		

     1.3. If the PIN is "INET_SOURCED", do not attempt to refund the e-book in Book-log. Follow the instructions provided by Herkimer media.

2. Login to the Retail module.

3. Go to Sales | Mail Order, or click the 📑 icon. The Mail Order Pick List will open.

4. Click the 🔄 icon for Refund. The Mail Order Refund window will open.

5. Type the number of the mail order that you are refunding.

6. Click OK.

7. Set the Ship amount to 0 for any items not being returned.

8. Click Process. Click Process.

9. The Payment window will open.

10. Click the button for your desired refund tender.

11. The Enter Amount for Payment type window will open.

12. Click Plug-In Total or type an amount into the $ field. If you type an amount, click the -/+ button to make the amount negative.

13. Press Enter or click Process to process the payment.

14. Pay the customer back their cash if the refund is tendered in cash. If the customer prefers refund to a credit card, campus card or Financial Aid, follow the instructions for performing refunds provided with those interfaces.

Voiding E-Book Transactions

Perform your void just as you would on any other transaction. Refer to the help documentation in the Retail module for help with voids.

> **NOTE:**
> Remember that transactions can only be voided on the day they are performed! Once End of Period Processing has been performed, you must perform a refund instead of a void.

Reports

Ebook Coordination Deletions Report

The Ebook Coordination Deletions Report shows all RedShelf and VitalSource e-books that were deleted through the Coordinate eBook Catalog window. E-books that were deleted using a different process, such as pressing Ctrl+Delete (Control + Delete) in the Item Search window, are not included in this report.

- Enter the date rage for the report into the Date From and To fields. The report will show e-books deleted between the entered dates.
- Use the radio buttons to limit or expand the number of items on the report. The All Data option includes items that were never adopted to a term.

When to Run this Report

Run the report from the report picklist any time you need to review your deleted titles or update your adoptions to remove deleted titles.

If any titles were deleted during an e-book coordination, this report will automatically print to the screen.

Ebook Sales Report

The Ebook Sales Report shows customers who bought e-books during a selected period of time. If the book was refunded to the store, the report will show the refund date. If the e-book was purchased as a textbook, the report will also show the term associated with the sale.

- The report is grouped by e-book vendor, then by title.
- Select a term in the report parameter to restrict the report to only books purchased for that term.
- Each transaction shows the associated transaction PIN.

When to Run this Report

Run this report to track your e-book sales. You can use it to review specific trans-actions or to see trends in your e-book sales across days, months, or terms.

Ebook Scan Card Report

The Ebook Scan Card Report creates printable cards that stores can put on the floor to remind students that an e-book is available.

Students pick up the cards and bring them to the register. Cashiers can scan the ISBN barcode on the card just as they would scan the barcode on a book. The e-book is loaded into the Cash Register for sale.

The cards print four to an 8 1/2 by 11 inch page. The report shows the Course, Term, Title, Author, Edition, copyright date, publisher, vendor, and ISBN. Price and Instructor are optional.

- Use the Qty Type radio buttons to select how many copies of each scan card you want to print.
- To include the price, check the Include Price option.
- To include the instructor's name, check the Include Instructor option.

When to Run this Report

Run this report to produce a group of printable cards for the e-books that your store sells.

eBook to Adoption Comparison

The eBook to Adoption Comparison Report compares your e-book catalog with your upcoming adoptions. If it finds a match between your adoptions and the catalog, the report suggests the e-book as a possible addition to your adoptions. You can also adopt them directly from the report, saving time and effort.
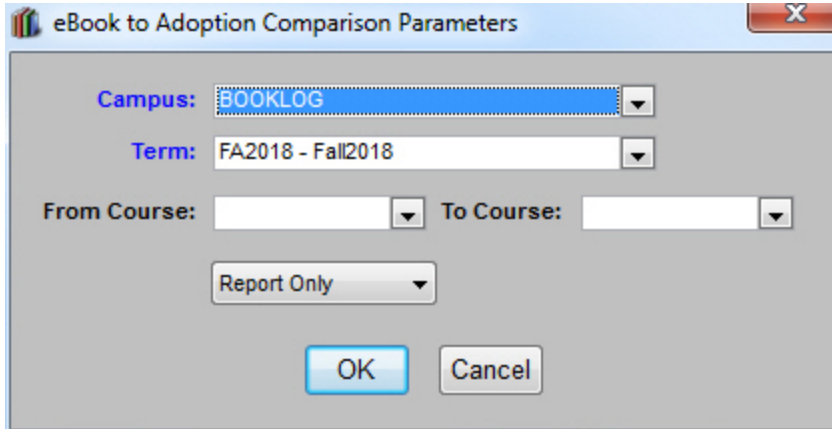
> **NOTE**
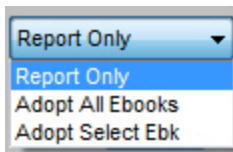> This report can take several minutes to generate!

- You must load an e-book catalog into your local database to use this report. If you have not, it will have no data to compare to.
- Titles shown in the comparison report are not localized yet.
- Titles shown with no price can be priced however you like once localized.
- Titles shown with a price are agency titles that must be sold for the list price.

- The report allows you three choices: to simply see the report, to adopt all e-books, or to adopt selected e-books.

- If you choose either of the adoption settings, you can adjust the adoptions before saving them.

1. Open the Reports Picklist.
2. Select the eBook to Adoption Comparison Report.
3. The parameter window will open.

4. Go to the pull-down immediately above the <u>OK</u> button. You have three options:

   4.1. **Reports Only**: Runs the report.

   4.2. **Adopt All Ebooks**: Includes the "Adopt?" column in the report. The check-box in the "Adopt?" column is checked for each item.

   4.3. **Adopt Select Ebk**: Includes the "Adopt?" column in the report. The checkbox in the "Adopt?" column is unchecked for each item.

5. Click the <u>OK</u> button.
6. The report will run. If you selected either of the "adopt" options, note the <u>Adopt?</u> column to the far right of the report.
7. Check the box for each e-book that you would like to automatically adopt.

eBook to Adoption Comparison							Term: Spring2016
							Courses: Beginning to End
UPC	Digital ISBN	Author	Title	Ed	CY	Cost	Price
College/Course/Section						Adopted ISBN	Adopt?
5407625968419330	9781118476697	CAY S. HORSTMA	JAVA CONCEPTS (EXPIRES IN 120 DAYS)	7		$45.00	$50.00
CPSC-17200 00		HORSTMANN	JAVA CONCEPTS (P)	7TH	2014	9781118431122	☑
1740606027486665	9781118476697	CAY S. HORSTMA	JAVA CONCEPTS (EXPIRES IN 180 DAYS)	7		$50.63	$56.25
CPSC-17200 00		HORSTMANN	JAVA CONCEPTS (P)	7TH	2014	9781118431122	☑
0786744103947965	9781118476697	CAY S. HORSTMA	JAVA CONCEPTS (EXPIRES IN 90 DAYS)	7		$42.19	$46.88
CPSC-17200 00		HORSTMANN	JAVA CONCEPTS (P)	7TH	2014	9781118431122	☑
3621320098206596	9781118476697	CAY S. HORSTMA	JAVA CONCEPTS (LIFETIME)	7		$56.25	$62.50
CPSC-17200 00		HORSTMANN	JAVA CONCEPTS (P)	7TH	2014	9781118431122	☑
2158547171111998	9780077760618	HUGHES	LEADERSHIP: ENHANCING THE LESSONS OF EXPERIENCE (EXPIRES IN 130 DAYS)	8		$134.82	$149.80
OB MGMT-36700 51		HUGHES	LEADERSHIP	8TH	2015	9780077862404	☑

8. Close the report.

9. You will get a prompt asking if you want to save your changes.

    9.1. Select <u>Yes</u>: The checked items will be adopted. Saving the changes may take several minutes.

    9.2. Select <u>No</u>: Nothing will be adopted. Any changes that you made to the report will be lost.

When to Run This Report

Run the eBook to Adoption Comparison report after you have entered all or a significant portion of your adoptions.

Troubleshooting RedShelf E-books

You get a "Failed to Open File" message.

If you get the "Failed to Open File" message when downloading the catalog via FTP, it's most likely that the file isn't available on RedShelf's FTP site.

1. If you are downloading the entire catalog, confirm that RedShelf has put the file called *current_rs_full_catfile.txt* on the ftp site. If not, ask RedShelf to change the file name to *current_rs_full_catfile.txt*.
2. If you are downloading a catalog for a specific term, wait a day after uploading the booklist to RedShelf. The file is generated overnight.
3. Check to make sure that you are downloading the file for the correct term.
4. Booklog matches the files on Term Code (in the Academic Term window) and Store SAN (in the Store Properties window). Make sure that these values have not changed since you sent your catalog, and that there are no blank spaces.

If you get the message when loading the catalog using the File Import method, there is something wrong with the catalog. Refresh the file on your computer. If that doesn't help, contact Booklog or RedShelf for troubleshooting help.

You get a "One or more of the parameters required to communicate with RedShelf are missing" message.

You do not have the FTP parameters required to download the e-book catalog. Enter these into the RedShelf add-in window.

One or more titles failed to retrieve their new pricing from the web service.

There are two possible reasons for this message:

1. You are not connecting to the e-Book Catalog Coordination web service. Review your Web Service User and Web Service Password values in the RedShelf Add In Parameter Detail window.
2. One or more titles is missing a Print ISBN or Duration. Pricing is determined by Print ISBN and Duration, not by UPC.   When the coordination window opens, check for records without Print ISBN or Duration values.

You get the message "Error accessing External object property blocking at line 11 in constructor event of object tm_u_sftp"

You need to register some of your files. Run register_wod_dll.bat, which is found in your Booklog directory.

You get the message, "Error calling external object function getfile at line 14 in function of_get_file of object tm_u_sftp".

The catalog file that you attempted to download is not available on Redshelf's FTP site. Contact Redshelf to ask for the catalog file.

You get the message "The following errors were detected: The submitted titleid cannot be found in system."

The ISBN/SKU of the book you are attempting to sell is not registered in RedShelf's catalog. The ISBN/SKU may have changed to reflect a change in the item's price.

1. Make sure that the item is a RedShelf e-book.
2. Coordinate your RedShelf catalog to pull the current ISBN/SKU for the item.

You get the message, "Error occurred while creating PIN request details: PIN was auto-retrieved and is unable to be refunded through Booklog" when trying to refund an e-book.

The e-book was auto-activated through Timber, and can not be refunded through Booklog. See https://timberforum.bookstorewebsoftware.com/thread/100/refunding-redshelf-e-books for more information, and contact Herkimer Media if you have questions.

You get the message "Error Text: Error calling external object function checkdir at line 14 in function of_check_directory of object tm_u_sftp"

Check the cfclog for the error "Failed to change directory." If you find this, your RedShelf mailbox does not contain the correct directory. Ask RedShelf to create the */files/adoption_matches/* directory and to place your downloadable catalog in that directory.

You get the message "The store has not been registered with the eBook Vendor" when trying to sell a e-book.

Go to the Redshelf vendor record, and open the eBook tab. Confirm that the Store Network ID matches your RedShelf ID, and that there are no extra spaces before or after the ID code.

You get the message "Error accessing external object property is_url at line 24 in function of_query_isbn of object n_bo_redshelf"

You need to register the communication files. Go to C:\blwin32 and find the file called SOCK_RSA_COM. Right-click on it and choose "Run as administrator". Follow the instructions in the running file.

You get the message "Error calling external object function connect at line 10 in function of_connect of object tm_u_sftp" and/ or the message "Login incorrect".

The fields for Username, Password, Server, or Port in the Redshelf Add In Paramter Detail window are missing or incorrect.

You get the message "The eBook service was not configured correctly. There are no register PIN providers for the following "UPC(S)"

The item or items listed below the text are not assigned to the RedShelf vendor record, and thus no PIN was generated. The vendor code for RedShelf e-books must be "REDSH". Refund the items, then open the item record. Change the code to "REDSH", save your changes, and re-sell the item.

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