

Quick Start

Advanced Book Exchange Inc.

HomeBase

Rare, Out-of-Print and Antiquarian Bookshop Management Program

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1 Welcome to HomeBase

Thank you for selecting HomeBase.

Whether you are new to computing or a seasoned veteran, HomeBase will make the job of managing your bookstore inventory easier and helps you conserve those precious commodities, time and money. Our goal in designing HomeBase and its supporting materials is to make learning and using the product as effortless and enjoyable as possible.

Since we introduced HomeBase, we've been listening and talking to you. We took your good ideas about new features and added them to our own. The result is a logical extension of the original product. Like the dashboard of a well-designed car, the design of HomeBase is direct and intuitive - everything is where you would expect it to be. So, you can focus your energies on managing your bookshop rather than on how to use the product.

This manual contains basic information about HomeBase and it's use as well as a step-by-step quick start tutorial to get you up and going as quickly as possible.

Enjoy using HomeBase; as always, we welcome your comments and suggestions. Please send along any you have to:

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Or email us at:

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Discussion

The basics covered in this chapter give you a foundation for working with HomeBase, including an overview of the information managed by the program and an introduction to its interface. If you are new to HomeBase, we recommend that you read this chapter before you begin.

Information Managed by HomeBase

HomeBase allows you to use your computer to manage the following types of bookshop information:

- **Books.** You may store the following pieces of information about each book in your inventory:
 - title;
 - author;
 - publisher information;
 - keywords describing the book;
 - price;
 - details, such as condition, content, size, number of pages, illustrator or any other pertinent information about the book;
 - an inventory number which can be automatically generated by HomeBase or set by you to conform to your own inventory numbering system.

Author, title, publisher information and other descriptive keywords are all keyword searchable in HomeBase. These keywords are also used to match wants when your books are loaded onto the Advanced Book Exchange system.

- **Catalogues.** HomeBase allows you to organize your books into groups called catalogues. For example you can create catalogues to:
 - identify which books you would like to list on the World Wide Web in the Advanced Book Exchange;
 - produce a printed catalogue to send to your non-computerized customers;
 - organize your inventory by specialty areas such as books on the American Civil War, Antarctic Expeditions or Gardening.

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How you manage your catalogues is up to you!

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- **Clients.** HomeBase allows you to keep track of a clients' name, address, phone numbers or even an Email address. In addition, clients may be assigned a client type. You can create client types on an as -needed basis to organize your clients into groups. For example you could create a group of customers, booksellers or book scouts. You have the flexibility to create and use your own client types however you like.
- **Client Wants.** You can keep track of your client's wants in HomeBase. Want requests consist of one or all of the following pieces of information:
 - author;
 - title;
 - publisher information, for example Michael Joseph, London, 1979;
 - other descriptive keywords;
 - a comment, to store extra information the client has provided to you, for example a signed copy is wanted;
 - an inventory number which is automatically generated for you by HomeBase

Author, title, publisher information and other descriptive keywords are all keyword searchable in HomeBase. These keywords are also used to match books when your wants are loaded onto the Advanced Book Exchange system.

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Getting Around in HomeBase

HomeBase was written for computers which run the Windows operating systems. All the graphical features which come with these operating systems can be found in HomeBase. These features include clipboard copy and paste, pull down menus, pick lists, push buttons and radio buttons.

When HomeBase starts up, you will see the HomeBase Command Center Window and a menu bar along the top of the HomeBase window. The command center allows you to perform common tasks with the click of a button. The menu bar allows you run any of the HomeBase program features. You can list or manipulate information about your bookshop by selecting a pull down menu choice from the HomeBase menu bar or by clicking on a button in the HomeBase Command Center window.

Each type of information in HomeBase can be managed using its own list window. A list window consists of areas where you can review, select or manipulate the information displayed. The book search list for example consists of the following areas:

- a **Filter** area allows you to choose list searching and sorting criteria;
- the **List** of information satisfying the search and sorting criteria;
- some **Detail** about the currently selected piece of information;
- push buttons which cause some **Action** to be performed on information displayed.

When a push button is clicked, some action relating to the information in the window is taken. For example when the <Update> button is pressed for a highlighted book in the List area of the Book Search List window, the Book Maintenance window is displayed.

When you are finished changing or viewing the information in the window, press the <Finished> button to return to the previously displayed window.

Getting Help

HomeBase has a context sensitive help system. You can get help by

- pressing a <Help> button in any HomeBase window;

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- pressing the F1 function key;
- clicking the Help-Contents menu pick in the HomeBase main menu.

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Reports

HomeBase allows you to print reports about your bookshop information in several different ways. A report window consists of a number of areas where you can select a report and choose sorting criteria for the list. The Book Report window consists of the following areas:

- the **Type** of report you would like to create;
- the fields you would like the report **Sorted By**;
- report information **Selection Criteria**;
- push buttons which when clicked perform an **Action** relating to the report.

Once the report style, sort order and selection criteria have been chosen, you may print, preview or export the results of the report to an external file format by clicking the <Send> button in the Route Report window.

Warnings

HomeBase requires a confirmation if you try to remove information from the databases or run a system utility. A Warning window is displayed when this happens. Clicking the <OK> button tells HomeBase to go ahead with the operation (i.e. delete a book), clicking the <Cancel> button stops the action.

A Tutorial

This chapter presents a HomeBase tutorial. Each section of this tutorial provides a step-by-step explanation of how to perform a common task using HomeBase. Each example assumes you will begin with the HomeBase Command Center Window in view.

Creating a Catalogue

HomeBase uses the simple grouping feature found in many bookshops; catalogues to manage books. This section of the tutorial provides a step-by-step explanation of how to create a catalogue that will be used to “attach” books to.

Step 1, Click the <Catalogues> button in the Manage Your Store area in the HomeBase Command Center Window. The Manage Book Catalogues window will be displayed with the first in the list catalogue highlighted (if you have no catalogues in HomeBase yet the list will be empty)

Step 2, Click the <Create> button in the Manage Book Catalogues window. The Book Catalogue Maintenance window will be displayed. Enter any name you like i.e. Westerns and a description of what is contained in the catalogue.

Step 3, Click the <Add> button. The Manage Book Catalogues window is displayed and your new catalogue is listed in the Catalogue List.

Step 4, Click the <Finished> button. You are finished creating a catalogue.

FYI:

- Sold books can be moved from one catalogue to another by pressing the <Move Sold Books To..> button. This way you can create a historical list of sold books in a “sold” catalogue.
- You can copy an entire catalogue from one catalogue to another by pressing the <Copy From> button.

3 Hard Facts

Adding a New Book to a Catalogue

This section of the tutorial provides a step-by-step explanation of how to add a new book to HomeBase and “attach” it to a catalogue of your choice.

Step 1, Click the <Catalogue> button in the Manage Your Store area in the HomeBase Command Center Window. The Manage Book Catalogues window will be displayed with the first catalogue in the list highlighted.

Step 2, Click on the catalogue you wish to add a book to.

Step 3, Click the <Add> button in the Manage Book Catalogues window and the Book Maintenance window will be displayed. The name of the catalogue you chose in the previous window is displayed in a small list at the top right hand corner of the window. This indicates that the book will be “attached” to this catalogue when it is added to the book inventory.

Step 4, Choose a book from your physical inventory and type in the information describing it. You can move from field to field by using the <tab> key on your keyboard or by clicking in the field with your mouse. Notice that the Book # field has been left blank. If you leave this field blank HomeBase will automatically generate a book inventory number for you.

Step 5, Click the <Add> button. The book inventory number will be displayed in a message in the top right hand corner of the window. Note, if you have your own book numbering system, you may enter that number into the Book # field in the Book Maintenance window before clicking the <Add> button. HomeBase will use your number instead.

Step 6, Press any key and part of the information you previously entered will be carried forward so you can add the next book. The catalogue name you originally selected is still displayed.

Step 7, Click the <Finished> button. The Manage Book Catalogues window will display the book you just added, “attached” to the catalogue you originally selected.

Step 8, Click the <Finished> button. You are finished adding a new book to a catalogue.

FYI:

3 Hard Facts

- A book can be attached to several catalogues at the same time but only one copy of the book exists.

3 Hard Facts

Adding Wants

In order to upload a want to the Advanced Book Exchange on the World Wide Web, the want must be added to the HomeBase want inventory. In addition the want must be “owned” by a client. This section of the tutorial provides a step-by-step explanation of how to create a new client and attach a new want to that client.

Step 1, Click the <List Wants> button in the Manage Your Book Shop area in the HomeBase Command Center Window. An empty Want List window will be displayed.

Step 2, Click the <Add> button in the Want List window and the Want Maintenance window will be displayed.

Step 3, Enter the client and want information into the fields on Want Maintenance window and click the <Add> button when you are done. The want you just added will be displayed in the Want List window.

FYI:

- If you know the client exists in HomeBase already, you can click the Get Client button to select an existing client.
- A client can be added to HomeBase with as little information as a name and phone number. If you would like to add more client information for a client, use the client button on the Command Center window.

Step 4, Press the <Finished> button in the Client List window to return to the HomeBase Command Center window. You are finished adding a new want to a new client.

Exporting Books to ABE

Once you have added your books and wants to HomeBase you can copy the same information to the Advanced Book Exchange system on the World Wide Web using the Export facility. Your exported Books will be searchable by author, title, publisher information and other keywords on the World Wide Web. Your exported wants will be matched against the book inventories of all other ABE book seller members.

This section of the tutorial provides a step-by-step explanation of how to export book catalogues to the Advanced Book Exchange on the World Wide Web.

Step 1, Click the <Export> button in the Manage Your Store area in the HomeBase Command Center Window. The Export window will be displayed. You must decide which book catalogues and wants will be sent to ABE. For the purpose of this tutorial we will send one book catalogue to ABE.

Step 2, Click on a catalogue in the Available Catalogues list and press the <Select> button. The catalogue name will be copied to the Catalogues to export list.

Step 3, Click on the first <Create> button located just below the Catalogues to export list. A Save As window will be displayed with a file name containing today's date in the form dbYYMMDD.txt.

Step 4, Click the <Save> button. A series of brief messages will be displayed as HomeBase creates the export file for you. (Note: you may change the name of the export file if you choose but please leave the extension name as txt) A message will appear telling you how many records will be exported.

Step 5, Click any key to continue.

Step 6, Connect to the INTERNET.

Step 7, When your connection has been established return to the Upload Books/Wants window and click the <FTP> button in the Export window. This will start the File Transfer Protocol (FTP) program. This program will actually copy the export file you created in Step 3 to the ABE computer for processing. The FTP Session Profile window will be displayed.

Step 8, Be sure that the current profile in the Session Profile window is set to your ABE account name and that the Host Name is set to www.abebooks.com. Click the <OK> button.

3 Hard Facts

Note: YOU MUST BE SIGNED ONTO THE INTERNET before you can send an upload file to the ABE computer.

Step 9, Enter your ABE password. After a few messages scroll by at the bottom of the WS_FTP transfer screen, files in your computer (Local System) and files in your directory on the ABE computer (Remote System) will be listed. In the Local System list highlight the file you want to copy to ABE (the same one you saved in step 3) and click the --> button (an arrow). The file will be copied to the Remote System. When the name appears in the Remote System file list, the transfer has completed.

Step 6, Click the <Exit> button to exit the FTP program.

Step 7, Click the <Cancel> button in the Upload Books/Wants window to return to the HomeBase Command Center window. You are finished uploading a book catalogue to ABE.

FYI:

- When you export books or wants in the ABE Format, a “changed since” date and time is maintained and displayed on the export screen. The next time you export to ABE, you can click the Changed Since check box and the previous date and time will appear. If this date and time are present, HomeBase will export only those books that have been changed since that date and time.
- If you feel your HomeBase book or wants lists are becoming out of sync with the same lists on ABE, click the Purge Books check box. This will cause your existing books and/or wants to be purged on ABE and to be replaced with the file you create with the Export function.