



Making Claims through Batch

This document will discuss:

- Advantages of submitting claims through Batch
- Making a claim
- Making a claim through Penguin Random House
- Understanding the Claims status
- Claim FAQs

Advantages of Submitting a Claim through Batch

If there are problems such as shortages or damages with a shipment, you can submit a claim to the vendor directly through Batch. The advantages of using Batch to make claims are that it saves you time and keeps a record of your claims on Batch.

Making a Claim

Find your transaction that you want to make a claim against and click on the Claim link

31-Mar-2021	Inv	0958638768		62.37	62.37	29-Jul-2021	Open	Claim
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Select the reason and quantities for the impacted titles

Title	Quantity	Reason	Unit Price	Total Price		
One Family	62632	Zero	9.87	Supplied item received damaged	18.99	1
Chirp	62632	Zero	9.35		8.99	2
Find Your F cking Happy	62632	Zero	7.79		14.99	1
I Shall Not Want (Min Sig Ed)	62632	Zero	5.19		9.99	1
Red, White, and Royal Blue	62632	Zero	8.83		16.99	1
Silent Patient	62632	Zero	84.21	Shortage - quantity invoiced not supplied in full	26.99	2

Validate at the bottom of the page after the reason and quantities have been entered.

7	Silent Patient	62632	Zero	84.21	Shortage - quantity invoiced not supplied in full
2	Too Good to Be True	62632	Zero	14.55	
1	Wise Blood	62632	Zero	8.32	

Rate	Net Value	Tax Value
0.00	148.11	0.00



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Review the claim and then press confirm

Order No. Cust Ref	Currency	Invoice Date
62632	USD	31-Mar-2021

Title	Order No. Cust Ref	Reason	Unit Cost	Qty	Disc. %
One Family	62632	Supplied item received damaged	18.99	1	48.00
Silent Patient	62632	Shortage - quantity invoiced not supplied in full	26.99	2	48.00

te	Net Value	Tax Value
10	37.94	0.00
10	0.00	0.00

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After the claim has been submitted

Batch will send a file to your vendor with the details of your claim. After the vendor processes the claim, they will transmit a credit note to Batch for you to apply to a payment at your discretion.

Understanding the Claims Status

When you submit a claim, a new transaction is created within Batch and is assigned Claim as a transaction type. You can click on the Claim Number (circle below) to see the details of your claim.

26-Feb-2021	Inv	0955235603		918.94	910.64	26-Jun-2021	Open	
12-Mar-2021	Claim	0955235603	169510	8.30	8.30	26-Jun-2021	Open	Sent to Vendor

The claim and the original invoice are assigned the same invoice number within Batch and are linked together. If you authorize the invoice, the claim will also be authorized and vice versa.

26-Feb-2021	Inv	0955235603		918.94	910.64	26-Jun-2021	Open	
12-Mar-2021	Claim	0955235603	169510	8.30	8.30	26-Jun-2021	Open	Sent to Vendor

Because the claim and invoice are linked together, you never need to update the status of a claim. That will happen automatically upon updating an invoice. Also, linking them together makes it easy to search by the invoice # to be able to easily view claim and invoice side by side.

Making a Claim through Penguin Random House

Making claims through Penguin Random House is different than the other vendors. Instead of submitting the claim through Batch, you'll continue to submit claims through their .biz site.

Find your transaction that you want to make a claim against and click on the Claim via PRH link and you'll be directed to their .biz site.

20-Apr-2021	Inv	1089352786		87.48	87.48	30-Jul-2021	Open	Claim via PRH
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Claim FAQs

What should I do with damaged books?

If a credit note appears on Batch after you submit your claim, that is an indication that any damaged copies can be donated or destroyed. If the publisher would like you to do something different with them, they will contact you directly before posting the credit note to Batch.

Who will the publisher contact if there is an issue with the claim?

The publisher will reach out to the email listed on the primary Batch account. At the present time, we are unable to specify a different recipient.

How long does it take for credit notes to appear on Batch?

It varies from publisher to publisher. HarperCollins and Penguin Random House tend to post credits within 1-3 business days from submitting the claim. Macmillan processes and posts their credits within a few weeks.

Who do I contact if I can't find a credit note?

If you've made a claim and a credit note hasn't appeared on Batch within 30 days, please email support@batchforbooks.com. If possible, include the original invoice # and the claim #. Both can be found on Batch.

How long do I have to make a claim through Batch?

You have 30 days to make a claim through Batch. After 30 days is up, the 'Claims' link will no longer appear with that transaction.

Will Claims transactions get transmitted to QuickBooks if I'm using BatchSync?

No. The invoice will be transmitted with its original value and will not be altered. The corresponding credit note will also be transmitted to QuickBooks.

Do I have to authorize claims?

No. Claims are linked with their original invoice. When you authorize and submit payment for the original invoice, the claim will also be authorized. We recommend not updating the status on a claim and instead make all updates on the original invoice.

Can I make multiple claims against the same invoice?

Yes. There is no limit to how many claims you can make against an invoice.