# Quick Guide to Getting Started with Batch

Welcome to Batch for Books. This guide is to help you quickly get started with the basic functions of using Batch and will include information on:

- Logging into your Batch web portal
- Accessing your invoices and credit notes
- Authorizing invoices for payment
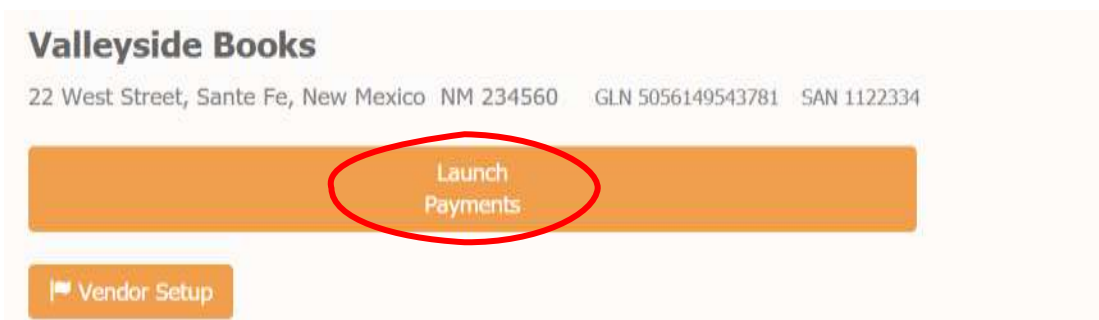- Preparing your payment

Throughout, there are links to related resources if you want more in-depth information on a topic. All related resources are clickable links and can also be found with our How-To Guides (https://batchforbooks.com/web/how-batch-works/how-to-guides).
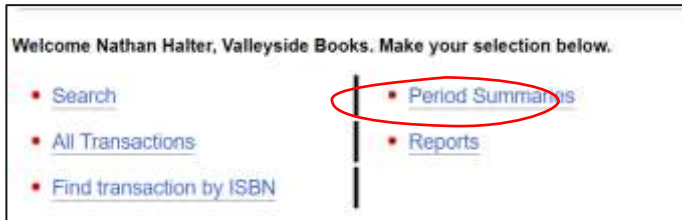
Logging into your Batch web portal

Go to batchforbooks.com and click on the BatchOne Login in the upper right corner of the screen OR go to batchforbooks.com/batchone. *We recommend bookmarking the latter URL.*
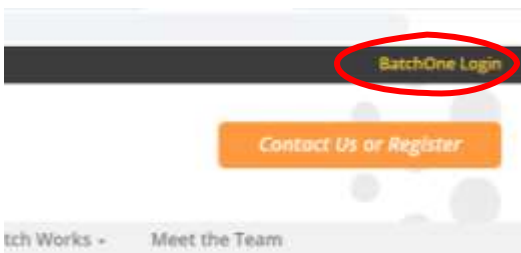
After you enter your e-mail address and password and log-in, click on the Launch Payments for your site.

Accessing your invoices and credit notes

Welcome Nathan Halter, Valleyside Books. Make your selection below.

- Search
- All Transactions
- Find transaction by ISBN
- Period Summaries
- Reports

From the main menu, click on Period Summaries

The **period summary table** shows invoices and credit notes based on their due date. You can set the period filter to show invoices already paid (Past), invoices due now (Current), or invoices due later (Future).

To see your list of transactions, choose the period you want to see and click the number on the table for the publisher and status you want to view.

A note about the different periods that you can view….

The underlined date is the next Batch remittance date. This date dictates what's considered current (due now).

Past – shows invoices already paid through Batch.

Current – this is the default and will show you all open invoices that are due BEFORE the remittance date. (Due Now)

Future/Future by Week – shows all open invoices due AFTER the remittance date (Due Later).

Related resources to accessing your invoices:

Searching in Batch

Authorizing Invoices

After you click through from the period summary table, you will see a list of your invoices and credit notes. Batch will only remit a credit note or invoice once it's been authorized, so the next step is to authorize your transactions.

To authorize, click on the radio button in the 'A' column for all the invoices and credit notes you want to authorize, then go to the bottom of the screen and hit Update.

You can view transactions based on their statuses by using the 'Filter Transaction by Status' dropdown at the top of the transaction list.
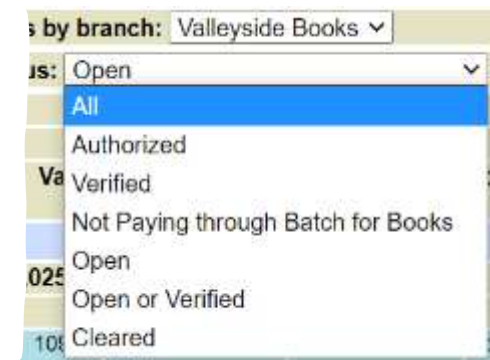
Related resources to authorizing invoices:

▶ **Authorizing Invoices**

🗎 **Understanding Transaction Statuses**

▶ **Navigating the Transaction Screen**

Setting up a payment

You've located and authorized invoices and credit notes. Now it's time to make a payment.

First, identify the amount of your payment in Period Summaries.

Period Summary for Valleyside Books
Invoices Due By 31-May-2021

Remittance date

Make sure the period filter is set to current.

Show Period: Current

Currency : USD

Company Name	Open Transactions	Outstanding	Authorize All	Verified Transactions	Authorized Transactions		Amount to be paid to Batch
Aries Distribution - Demo account	35	7,269.71		21	24	940.78	940.78
Chieftan Distributors - Demo Account	133	18,739.88		0	11	627.76	627.76
Cosmos Distributors - Demo Account	225	42,083.75		3	0	0.00	0.00
Totals	393	68,093.35		24	35		1,568.54

Amount to be paid to Batch

Batch only remits authorized invoices that are due now (Current). You can authorize invoices that are due later at any time, but they won't get remitted until they become current.

Next, send your payment to Batch

Payments to Batch happen outside of your Batch web portal. After you find the total you owe, you will send your payment to Batch through your bank.

Important! Your payment must be deposited into Batch's bank account two business days BEFORE the remittance date. *Example: If the remittance date is Friday, May 28th, your payment must be deposited in Batch's account by the evening of Wednesday, May 26th for it be included with the remittance on May 28th.*

Payment Tips

Payment methods: You can send money to Batch in one of two ways: Wire Transfer (any amount) or Bank Transfers via ACH (up to $30,000) using Batch's banking details below. Batch does not accept payment by check or credit card at this time.

Bank fees: If your bank charges you a fee to transfer funds, Batch will cover one bank fee per month for at least the first six months you use Batch.

Alternatives: A free alternative to sending a payment via bank transfer is Melio Payments (meliopayments.com).

Batch for Books Bank Account Details

Wells Fargo Commercial Banking | 90 State House Square – 11th Floor | Hartford, CT 06103-3708
Account Name: Batch for Books Inc. | Account Number: 4969799527 | Routing Number: 121000248

Related resources to making a payment:

Bookstore Payment Status Report

Making a Payment to Batch

Making a Payment to Batch