

# Using Baker & Taylor Title Source 360 with grid templates

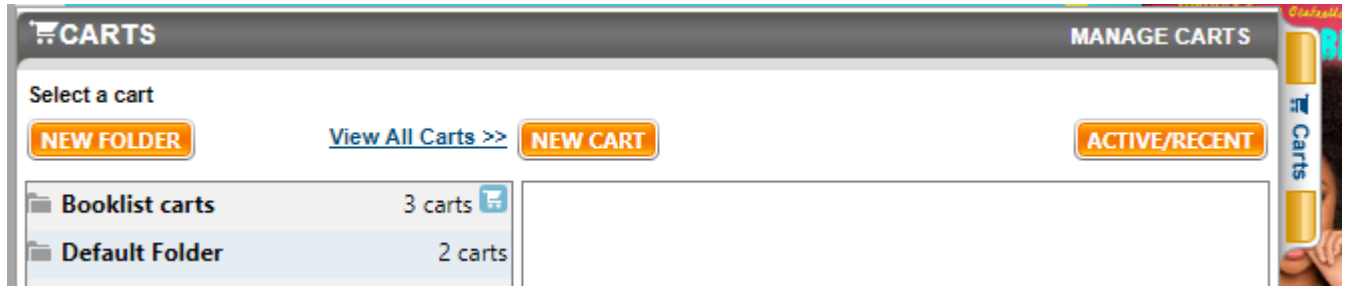
<https://ts360.baker-taylor.com>

Please use Google Chrome as your browser, per B&T instructions

## Creating a cart

Open the carts drawer at the left of the screen, just beneath the Home tab.

Click the New cart button at the top center of the pop-up box.



In the Create new cart box, type in your cart name;

Click Set as primary.

Make sure your Book account is correct.

Click the Grid template radio button to make sure your library's location appears. (This will allow you to add gridlines easily.)

Click the New cart button.

A screenshot of the 'Create New Cart' form. The form has a title bar with 'Create New Cart' and a close button. Below the title bar, there's a legend: '\* indicates required field'. The form contains several fields: 'Cart Name' (required) with the value 'Chris' trial cart', 'Set as Primary' (checkbox, checked), 'P.O. #' (empty), 'Choose Folder' (dropdown menu with 'Default Folder' selected) and a 'NEW FOLDER' button, 'Book Account' (dropdown menu with 'CLYMER' selected), and 'Entertainment Account' (dropdown menu with '75005418 - CHAUTAUQUA CATTARAUGUS' selected). Below these fields, there's a section titled 'Cart Default Grid Distribution' with a help icon. It contains four radio buttons: 'Use My Default Quantity - (currently - 0)', 'Use Zero Quantity - (title only)', 'Grid Template' (selected) with a dropdown menu showing 'CLYMER', and 'Grid Distribution'. At the bottom of the form, there are two buttons: 'CREATE CART' and 'CANCEL'.

## Searching and adding items to a cart

There are four main search methods:

1. If your grid templates are correctly set, you can add any item displayed on-screen to your primary cart by clicking the “ADD” button.
2. You can use B&T-generated lists under the Browse tab to choose titles.
3. Click Advanced search link at the top of the screen. The search screen will display.

Enter search criteria and click “Search” button.

View title info and reviews by clicking title links.

Click the orange “ADD” button to add the displayed title to your primary cart. If the Add button is not visible on your screen, cut and paste the ISBN into the Product search box at the top left of the page.

## Checking for duplicate orders

Click the “C” and “O” icons from each title record for a list of duplicate orders from B&T.

“C” means it exists in a cart already;

“O” means it has been ordered by a CCLS library. Open the link to see which libraries did.

## Adding gridlines to your cart

There are two main gridline methods:

1. If you have only 1 fund code:  
If you chose a Grid template when you created your cart, each title will be added to your cart with its template already in place.
2. If you have more than 1 fund code, add templates as you add titles:  
At the Item details page, click Grid at the middle left of the entry.  
From the Add gridlines menu, choose Paste default grid. Your grid codes will appear in the box below.  
Check the boxes at the left of the gridlines you do not want to use, leaving only the desired grid.  
From the Grid actions menu, choose Delete.  
Click the “ADD” button.
3. If you didn't follow the directions above for creating your cart, add gridlines individually:

At the Item details page, click Grid at the middle left of the entry. A box like this one will appear:

Grid (0)
Grid Actions Select Action
Add Grid Lines Select From

	QTY	MEMBER LIBRARY	HOLDING CODE	FUND CODE	ADDED/MODIFIED
<span style="color: blue; font-weight: bold;">+</span> Add	<input type="text" value="0"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

GRID DISTRIBUTION

You will need to fill in each field: quantity, member library, holding code, and fund code.  
 Click the “+” Add button in the box;  
 Click the orange Add button at the middle right of your screen.  
 Your gridline has been added.

Carts with gridlines added correctly will look like this:

	TITLE ▲	AUTHOR / ARTIST	ISBN/UPC	FORMAT	PRICE	PUBLISH / RELEASE DATE	QUANTITY
<input type="checkbox"/>	1.) <a href="#">An American Princess</a> Publisher: Amazoncrossing	Van Der Zijl, Annejet/ Hutchison, Michele	9781503951839	Hardcover	List: \$24.95 Net: \$13.70	05/01/2018	Qty: 1
<input type="checkbox"/>	2.) <a href="#">Cats!</a> Publisher: Blue Manatee Pr	Hutton, John, Dr./ Cenko, Doug	9781936669585	Board Book	List: \$7.99 Net: \$6.27	09/01/2017	Qty: 1
<input type="checkbox"/>	3.) <a href="#">The Good Girl</a> Publisher: Mira Books	Kubica, Mary	9780778319252	Paperback	List: \$9.99 Net: \$5.99	05/30/2017	Qty: 1
<input type="checkbox"/>	4.) <a href="#">Loud and Soft</a>				List: \$24.21		

Carts without gridlines look like this, and can't be ordered:

	TITLE ▲	AUTHOR / ARTIST	ISBN/UPC	FORMAT	PRICE	RELEASE DATE	QUANTITY
<input type="checkbox"/>	1.) <a href="#">A Christmas by the Sea</a> Publisher: Fleming H Revell Co	Carlson, Melody	9780800722715	Hardcover	List: \$16.99 Net: \$9.33	09/04/2018	Qty: <input type="text" value="0"/>
<input type="checkbox"/>	2.) <a href="#">The Darling Dahlias and the Poinsettia Puzzle</a> Publisher: Greenleaf Book Group Llc	Albert, Susan Wittig	9780996904070	Hardcover	List: \$25.95 Net: \$23.36	10/16/2018	Qty: <input type="text" value="0"/>
<input type="checkbox"/>	3.) <a href="#">Long Road to Mercy</a> Publisher: Grand Central Pub	Baldacci, David	9781538761571	Hardcover	List: \$29.00 Net: \$15.92	11/13/2018	Qty: <input type="text" value="0"/>
<input type="checkbox"/>	4.) <a href="#">Terra Firma</a>				List: \$22.99		

### Transferring a cart for ordering

- Locate the cart you want to order in the carts drawer. (Check the Default folder.)
- Double-click the cart name to open it.
- Sort the cart alphabetically by title.
- Click the Cart actions menu at the top right.

From the drop-down menu, choose “transfer”, and click “go”.

Find the name and account of the recipient (Chris Spink, CCLS575NY to submit a cart to order. You will likely need to scroll down to find it. Sometimes it takes time to load.)

Leave the Keep a copy... box unchecked. This will help to prevent duplicate orders.

Click the “transfer” button.

Please note: If you click Share cart, your cart will be visible, but can't be ordered. Only Transferred carts can be submitted for order.

## **Reports for MS Excel spreadsheet on-order files**

Make sure you are using Google Chrome as your browser.

Click the Carts tab at the top of the screen, then Manage carts. (Note: this will not work from the Carts drawer.)

A list of carts will display. Click the Select action menu at the right of your cart.

Choose Download/export cart.

A pop-up will appear, asking to choose the format of your report. Choose Lawson Excel, and then click Download.

Click Save.

Another pop-up window will appear with the Excel file attached.

## **TS3 tips & tricks**

### **TS360 navigation**

1. Be sure to click Add, Save or Update for each change you make to a gridline or cart.
2. You are welcome to use B&T-generated lists and publications to place orders. You can find them under the Home and Browse tabs.
3. In the Carts drawer, choose Ordered and submitted for a list of your ordered carts.
4. Following the “O” link will give you the status of an item you have previously ordered.

### **Grids**

5. There must be grid codes applied to every title ordered. Orders do not properly load at B&T without them, nor can they load into Koha.
6. The “notes” field in the grid template does not transmit to B&T. It is for your own use only.

### **CCLS**

7. To keep track of your orders, I will use this format for PO numbers: <delivery code>-<date> (OLE-120705).

8. Please keep CBA orders on separate lists, to minimize confusion in the CCLS business office.
9. Audio books can be ordered from B&T. Center Point and Thorndike large print can be ordered by slip.
10. Call Chris (716-664-6675 x 248) with questions, problems, etc.

Your favorite suggestions and tips are welcome, too! Contact Chris.

7/29/20