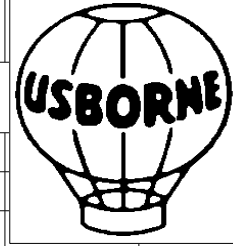# *Usborne Books*
# *At Home*

**Welcome to Debby McConnell's Spreadsheet Order Package for Microsoft Excel 5.0.  If you have a previous version of Excel or are working in either MS Works or Lotus 1-2-3, please call 800-727-1195 x55 or e-mail debbymac@aol.com for replacement files.**

**Important Note:**  The first time you open the various files, just insert your name, address, phone and consultant # where needed.   Then select "Save As" from the file menu.  Type in "Mystart.xls" or ("Myforms.xls and "Mymisc.xls") to keep a master with your info on it.

**Tax Rates:**  You will have to change the tax rate to your local one; both in the text area (I have put in ???? to remind you) and also in the formula. Save it as shown above as a master file.

**1.  First things first** - get all your customer and hostess order forms ready.  Grab a cup of coffee or cocoa and get started.  ***Close the office door and relax for a second.***

Click on the *"Re-Cap"* tab below and enter the appropriate info for each customer.  Since there are many variations in tax rates, whether you charged S/H, etc - please fill out these manually. The totals will be done for you.  Count the number of books each customer orders.

Depending on the total number of books ordered, you will use either the...

| # of Books | Form to Use | File Name |
|---|---|---|
| 20 | **- mini-summary form** | **(mini_shl)** |
| 58 | **- 3 page summary form** | **(summ_3pg)** |
| 95 | **- 4 page summary form** | **(summ_4pg)** |

Each form is totally self contained and includes the summary page with all calculations done automatically.  Just open the correct file and start

entering information, using either the **TAB** key & arrows or the move to move
to the correct cell. Where information needs to be added in some of the text
lines, just move to that cell and the line will appear up below the menu bar.
Use the mouse to move *(in that upper area - not on the actual spreadsheet)*
to the place needing info or correction, and either backspace or type over.

**2. Hostess Order** - Click on the "Host_Ord" tab below and fill in all the information:

(Use the tab key or the mouse to move to the proper column.)

List all the free *"merchandise credit"* books on this form (do not transfer these
same titles to the summary page or you will get duplicates!)

Scroll towards the bottom and fill in the merch. allow figure.  Since there
several combinations with date credit, etc.  you will have to figure this out and
enter it in yourself.  (Example:  '$20 + $5 date credit)  Typing the single apostrophe
before the sentence will negate the plus sign and keep it as written.

**3. Do you have charges that need to be authorized?**

For a single charge, click on the "***Cust_Ord***" tab below and fill
it out just like the paper form.  Titles and $$ info is not that
important but the charge card area is.  Make sure to call the
authorization agency phone number listed on the red sheet
in last month's newsletter.  Put down the number they give you
under **Auth No**.

For multiple charges, click on the "***Cdt_Auth***" tab below and fill in
all information.  Note the total charges down so you can include
this figure on the summary page of the order forms.  Remember to
include the authorization numbers - you can get multiple authorizations
by following the directions on the phone.

**4. Special Delivery Orders:**  Fill these out completely, listing all titles and prices.
*Do not re-list these on the summary order form.*  Manually enter the $2.50 for
the delivery charge, and remember to add it in again on the summary page -
$2.50 per special delivery order.

**5. Other Info:**

***PO Numbers*** - Since you are now computerized, you will have to give each order
your own PO number.  Any numbering system will do, but a good one is :
Year/Month/# Order for that Month.  So the second order placed in January

| | next year would be: | **960102** | That way, orders can be easily filed numerically | | | |
|---|---|---|---|---|---|---|
| | and will also be in date order.  There is a spot on each form for that number, so | | | | | |
| | please include it to make Tulsa's work easier! | | | | | |
| | | | | | | |
| | *Printing/Faxing* - Definitely save a hard copy of the order for your records! | | | | | |
| | But, one advantage to doing the forms on computer is the ability to fax directly | | | | | |
| | to Tulsa (if you have a fax/modem setup).  The orders come out crisp and clear. | | | | | |
| | | | | | | |
| | *Misc Other Forms* - These are included to help make everything easier for you. | | | | | |
| | I'll send out updates when the new supply order form comes out. | | | | | |
| | | | | | | |
| | | November Supply Order Forms | | | | |
| | | 25% and 50% Book Fair Order Forms | | | | |
| | | | | | | |

## OKAY - Go for it!

Any problems with the files, please contact Debby McConnell at 1-800-727-1105 x55

or - e-mail debbymac@aol.com

If you like this system and it makes your life easier, a donation of $10 would be greatly appreciated!

# *Usborne Books at Home*

## Show Re-cap Sheet

| **Show/Hostess Name:** | | | | | | | **Date:** |
|---|---|---|---|---|---|---|---|

| Customer Name | Retail Total | S/H | Tax | Total Amount | # of Books | Check | Cash |
|---|---|---|---|---|---|---|---|
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| **Hostess Orders** | | | | | | | |
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| | | | | | | | |
| Totals | | | | | | | |
| | | | | | | | |
| Notes: | | | | | | | |

| # Books Ordered: | | | | # of Books | | Form to Use | |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
| | | | | | | - mini-summar | |
| | | | | | | - 3 page summ | |
| | | | | | | - 4 page summ | |
| | | | | | | | |
| | | | | All forms are found in "forms | | | |

| Credit Card | CC Type |
|---|---|
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| USBORNE BOOKS AT HOME | | | HOSTESS ORDER FORM | | |
|---|---|---|---|---|---|
| | | | | | |
| **Hostess Name:** | | | **PO #:** | | |
| **Address:** | | | | | |
| **City/State/Zip:** | | | | | |
| **Phone:** | | | **Show Date:** | | |
| **Consultant:** | | | **ID#:** | | |
| | | | | | |

| Title | | Item # | Qty | Price | Amount |
|---|---|---|---|---|---|
| | | | 0 | 0.00 | 0.00 |
| | | | 0 | 0.00 | 0.00 |
| | | | 0 | 0.00 | 0.00 |
| | | | 0 | 0.00 | 0.00 |
| | | | 0 | 0.00 | 0.00 |
| | | | 0 | 0.00 | 0.00 |
| | | | 0 | 0.00 | 0.00 |
| | | | 0 | 0.00 | 0.00 |
| | | | 0 | 0.00 | 0.00 |
| | | | 0 | 0.00 | 0.00 |
| 1.  Transfer #1 to D on Summary Order Form | | **Merchandise Cost** | | | 0.00 |
| 2.  Subtract merchandise allowance earned or cost, **whichever is less** | | | | | 0.00 |
| 3.  Subtotal - If overage, transfer to E on Summary Order Form | | | | | 0.00 |
| 4.  Add 6% S/H on line #1 | | | | | 0.00 |
| 5.  Special Delivery Charge, add $2.50 | | | | | |
| 6.  Subtotal for tax - Add 3 + 4 + 5 | | | | | 0.00 |
| 7.  Add  ????% State Sales Tax | | | | | 0.00 |
| 8.  Add 6 + 7 | | | | **Total Due** | 0.00 |

| | = | | | | |
|---|---|---|---|---|---|
| Total Customer Sales | | Merchandise Allowance Credit Earned (refer to Credit Chart) | | | |
| This is the  ___  1st  ___  2nd  ___  3rd booking off of: | | | | | |
| | | (Previous Hostess) | | | |
| **Credit Card Information** | | | | | |
| ___  Disc ___  MC ___  VISA | | | | | |
| **Card # :** | | | | | |
| **Exp Date:** | | **Amt Paid:** | | | |
| **Name:** | | | | | |
| (Order faxed, keep signature on file for reference) | | | | | |
| **Authorization:** | | | | | |
| | | | | | |
| Special Delivery Information | | | | | |
| Ship to Name | | | | | |
| Address | | | | | |

| | | | | | |
|---|---|---|---|---|---|
| City/State/Zip | | | | | |
| Phone Number | | | | | |
| | | | | | |

| **USBORNE BOOKS AT HOME** | **CUSTOMER ORDER FORM** |
|---|---|

**Name:**                                               **Include with PO#:**

**Address:**                                       **Phone:**

**City/State/Zip:**

**Hostess Name:**                              **Show Date:**

**Consultant:**                                 **ID#:**

| Title | Item # | Qty | Price | Amount |
|---|---|---|---|---|
| | | 0 | 0.00 | 0.00 |
| | | 0 | 0.00 | 0.00 |
| | | 0 | 0.00 | 0.00 |
| | | 0 | 0.00 | 0.00 |
| | | 0 | 0.00 | 0.00 |
| | | 0 | 0.00 | 0.00 |
| | | 0 | 0.00 | 0.00 |
| | | 0 | 0.00 | 0.00 |
| | | 0 | 0.00 | 0.00 |
| Use this to figure "total customer sales" on hostess order form | | | A Total | $0.00 |
| Customer Specials | | | | |
| | | 0 | 0.00 | |
| | | 0 | 0.00 | |
| | | 0 | 0.00 | |
| | | | B Total | |

| | | |
|---|---|---|
| ***Submit only when*** | 1.  Subtotal A + B | |
| ***using Charge and*** | 2.  Add 6% S/H | |
| ***Special Delivery*** | 3.  Special Delivery Charge | |
| ***Information*** | 4.  Subtotal for Tax | |
| | 5.  Sales Tax  ??% of #4 | |
| | **6.  Total Due** | |

**Credit Card Information**

___ Disc ___ MC ___ VISA ___

       **Card #:**

       **Name:**

   **Exp Date:**                    **Amount Paid $:**

(Order faxed, keep signature on file for reference)

   **Authorization:**

**Special Delivery Information**

Ship to Name

Address

City/State/Zip _____

Phone Number _____

# Usborne Books at Home

## Charge Card Information Re-Cap Sheet

**Show/Hostess Name:** | | | **Date:**

| Customer Name | Total Charged | Exp Date | Credit Card Number | CC Type | Auth Code# |
|---|---|---|---|---|---|
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| **Total Charges:** | **$0.00** | | | | |

**Consultant:** | | **Show:**
**ID #:** | | **Attach to PO #:**