Quick Guide to Tracking Claims on Batch

This document will go over how to determine whether or not a publisher has processed and transmitted a claim you made via your Batch portal. Claims can be tracked via Advanced Search by setting different parameters based on the publisher.

Publisher	Search by	Advanced Search Parameters
HarperCollins	Invoice number	• Vendor: *HarperCollins* • Status: *All* • Transaction Type: *Credit Note, Claim, Invoices* • Search Parameter: *Invoice # in Invoice, Credit Note, Claim No field (first field)*
Gardner's US	Invoice Number	• Vendor: *Gardner's US* • Status: *All* • Transaction Type: *Credit Note, Claim, Invoices* • Search Parameter: *Invoice # in Invoice, Credit Note, Claim No field (left box)*
Macmillan	ISBN, Invoice Date	• Vendor: *Macmillan* • Status: *All* • Transaction Type: *Credit Note, Claim, Invoices* • Search Parameter: *ISBN of one of the books in the claim in ISBN field (right box)* • Transaction Date: *Invoice date* (enter in the From field)
Penguin Random House*	Invoice Number	• Vendor: *Penguin Random House* • Status: *All* • Transaction Type: *Credit Note, Invoice* • Search Parameter: *Invoice # in Invoice, Credit Note, Claim No field (left box)*

Stores cannot make PRH claims through Batch (stores should continue using the PRH .biz site for claims). Even though stores can't submit claims through Batch, it is possible to see on Batch if credit has been issued for claims made through the PRH .biz site.

Advanced Search Screen

1. **Vendor** - select the vendor from the dropdown

2. **Status** - always to set to All

3. **Transaction type**

   a. Harper, Macmillan, and Gardner's - must select credits and claims (selecting invoices is optional but recommended)

   b. PRH - must select credits and invoices (selecting claims is optional)

4. **Invoice #** - enter invoice # for Harper, Gardner's US, and PRH searches

5. **ISBN** - enter ISBN for Macmillan searches

6. **Transaction date** - enter invoice date into From field for Macmillan searches

Example Result Screen

Store makes a claim against HarperCollins invoice 82398532 for 4.58 and wants to see if they received the credit for the claim. Using the advanced search parameters outlined above, they see that a credit was issued:

TRANSACTION DATE ↓	TYPE	INVOICE NO	CN, CLAIM OR INV REF#	DUE DATE	VALUE	OUTSTANDING
← Set all transactions on this page to the same status						
26-OCT-2023	Claim	82398532	242233	18-JAN-2024	4.58	4.58
26-OCT-2023	C/N	8239853271015	82498256	26-OCT-2023 C	-4.58	-4.58
20-OCT-2023	Inv	82398532		18-JAN-2024	1,041.05	1,036.47

Store could run the same search but not select Invoices as one of the Transaction Types but would still see they received credit for the claim

TRANSACTION DATE ↓	TYPE	INVOICE NO	CN, CLAIM OR INV REF#	DUE DATE	VALUE	OUTSTANDING
← Set all transactions on this page to the same status						
26-OCT-2023	Claim	82398532	242233	18-JAN-2024	4.58	4.58
26-OCT-2023	C/N	8239853271015	82498256	26-OCT-2023 C	-4.58	-4.58