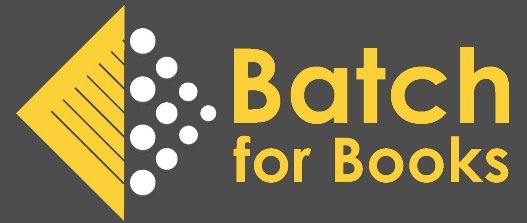


New User Checklist for June 2024



This checklist will guide you through all the steps you'll need to take during your first six weeks on Batch, from sending publisher confirmations to making your first payment.

Specific publisher notes are applicable only if you are adding that publisher to your Batch portal.

Questions? Email nathan.halter@batchforbooks.com or call 617-843-2490 for support.

Publisher Confirmations

- Macmillan*: Send email to MPS to confirm Batch participation.¹
- PRH*: Read FAQ and submit confirmation form.²

Accessing your Batch Portal

- Set up log-in to Batch for Books portal.
- Set up Batch log-in for other staff. (Optional)³
- Bookmark [login page](#).

Publisher Onboarding (*approx. activation dates*)

- HarperCollins* (~1st of month)
- Macmillan* (mid-month)
- PRH* (~10th of month)
- Gardners US* (~1st of month)

Next Page: Training, Payments, and QuickBook Integration

Training

- [Registered](#) for New User Orientation on June 6 at 2 pm Eastern.⁴
- Downloaded [Batch User Guide](#)

Payments

- Reviewed [Batch Payment Process](#)
- Set up process to transfer funds via ACH or wire.
- Make first payment to Batch!

QuickBooks Integration (optional)

Stores recommend to set up integration after all their publishers are on Batch but prior to their first payment..

- [Set up integration](#) between Batch and **QuickBooks Online** OR
- [Download and install BatchSync](#) to import invoices and payments into **QuickBooks Desktop**

Notes

^{1,2} Batch will provide MPS confirmation email address and PRH confirmation link. Failure to confirm will delay onboarding.

³ Email nathan.halter@batchforbooks.com the email address and name of the new login you'd like to set up.

⁴ One-on-one training is available if you're unable to make the New User Orientation.