

Quick Start Guide



Let's get set up and operating!

Getting Your Database Ready:



Check Affiliate Profile

Check the information on your affiliate profile within the Book Order System (BOS). This information will appear on the public Imagination Library website, so this step is very important. Some changes require approval before they can be seen on the system, so don't worry if you don't see all changes reflected immediately. We will aim to make all changes requiring approval within 24 hours.

Steps: Login to the BOS->Daily Operations->Affiliates->Edit Profile



Set Coverage Area

Be sure to add all combinations of each postal code your affiliate covers. For the USA, each city, state, zip and county needs to be listed in this section to correctly route online registration and transfers.

Steps: Login to the BOS->Daily Operations->Affiliates->Coverage Areas



Add(ing) Users

You may add any additional coordinators, data clerks or associates. Each user type has different access to the BOS and you can view the permissions in the Customer Service Center. Every person responsible for managing the database should have their own username and password.

Steps: Login to the BOS->BOS Users-> Click the Plus Sign "+"



Finalize Your Payment Option

When you submitted your paperwork back to your Regional Director in the early stages of the process, you selected your preferred payment method. While we have your payment method on file, we may need your account information or vice versa. Please reach out to us to finalize the option if you haven't done so already. Finance: invoice@dollyfoundation.com

Status Change:



Request a status change from Committed status to Operating.

This request will publish your affiliate on our public website and start routing registration requests based on the coverage area you set in step 1.

*Please note that you must move from Committed status to Operating within 6 months.

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Managing Registrations:

Now that you are an operating affiliate, online registrations and child transfers will be routed to you. These will be located in the pending area of the BOS. There are several different types of pending records such as Parent Edits, Transfers, Registrations & NCOA Flagged Records (if applicable). They can all be accessed on the left sidebar of the BOS under the Registration Alerts heading. The following three functions will allow you to add new records manually, edit or delete existing records and approve pending records.



Add a Child

To add a child, simply click add on the left sidebar and complete the required fields.



Edit/Delete an Existing Child

To edit or delete a child's record, simply click Search/Edit in the left sidebar then complete the searchable fields to locate the record. Then you can either makes changes or delete the matching results by clicking the blue edit button beside each result on the following page.



Approve Pending Records

To approve the pending records, click on one of the pending records in the left sidebar. You can locate these under the Registration Alerts section at the top of the sidebar.

Congratulations!

You have now completed all of the steps needed to be included in the next mailing. We process our mailings one month in advance so books should start arriving 6-8 weeks after a child is entered or approved.

Ready for more?

We have a wealth of knowledge in our **Customer Service Center** which is available 24/7 by visiting support.imaginationlibrary.com. It's amazing - go ahead, ask it a question!

You can also visit the welcome page of the BOS for quick access to other key documents. Can't find what you need? Please reach out to us at help@imaginationlibrary.com