QUICK START GUIDE
WELCOME TO THE BOS

Preparing Your Database:

☐ **Check Local Program Partner Profile**

Check the information on your local program partner profile (LPP) 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 > Program Partners > Edit Profile

☐ **Set Coverage Area**

Be sure to add all combinations of each postal code your local progam covers. Each city, state, zip and county need to be listed in this section to correctly route online registration and transfers. There are options to add multiple areas at once, options vary by country.

Steps: Login to the BOS > Daily Operations > Program Partners > Coverage Areas

☐ **Add(ing) Users**

Remember, only one person can be the main coordinator for your local program. Your main coordinator 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 Support Articles. Every person responsible for managing the database should have their own username and password.

Steps: Login to the BOS > Daily Operations > BOS Users > Click the Plus Sign "+" to Add

☐ **Finalize Your Payment Option**

When you submitted your paperwork to your Regional Director in the early stages of the process, you selected your preferred payment method. The three options are: 1. Auto-Pay 2. ACH Transfer & 3. Pre-Pay. More detailed information about these options can be found in our payment policy. 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 change from Committed to Operating.**

This request will publish your program 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.
** DWF must have your Nonprofit Postage Authorization (NPA) number on file before your status can be changed. If you have not completed this process, please see Nonprofit Mailing Rates (USA Only).

When you are ready to change your status to Operating, email help@imaginationlibrary.com

Managing Registrations

Now that you are an operating LPP, 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. 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 registrations.

☐ Add a Child

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

Or go to Daily Operations > Child Management > Add.

☐ Edit/Delete an Existing Child

To edit or delete a child's record, 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 button beside each result on the following page.

Or go to Daily Operations > Child Management > Search/Edit > Registrations

☐ Approve Pending Records

To approve the pending registrations, 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.

Or go to Daily Operations > Child Management > Pending

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 8 - 10 weeks after a child is entered or approved.

Ready for More?

We have a wealth of knowledge in our Customer Service Support 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