

Customer Tracking

Retailers are facing fierce competition these days, so many are protecting their local markets by building better relationships with their customers. One fundamental way of doing this is to track and analyze customer purchases, not only to stay in stock of similar and related merchandise, but also to market actively to customers.

WordStock 4's *Customer Tracking* program enables you to track customer purchases and generate reports so you can determine the source of sales and take steps to increase that business by identifying repeat customers and making sure your store meets their expectations. With *Customer Tracking*, you can define customer groups, such as Bookclubs, Reading circles, and professional memberships.

The main *Customer Tracking* functions operate through the POS program and are very simple to use: at the beginning of a transaction, the cashier types "track" and is prompted to enter the number you've assigned to the customer. (If you expect to track most sales, you can configure your system to use tracking as the default, so you don't have to enter "track.")

In case customers don't know their membership numbers, or don't have their membership cards, you can search the *Customer File* and grab their names on the fly. If customers aren't members, you can enroll them through the POS program; because WordStock is a real-time system, memberships become effective as soon as the data entry is complete.

Customer Tracking includes a complete suite of report generation tools; customer sales history can be viewed on-screen as well as printed.

Getting Started

If you're new to customer tracking, there are several things you need to consider:

How will you let customers know that you're starting your program?

Will you have WordStock assign customer numbers sequentially, or will you use an alternative scheme, such as using customer phone numbers?

How will you sign up customers—at the POS or at a customer service area?

Will you allow more than one person to use a customer tracking account?

If you have more than one store, how will you minimize duplicate enrollment?

Will you require a membership card? If so, what happens if the customer doesn't have the card?

What will your privacy policy be and how will you inform customers about it?

What It Costs

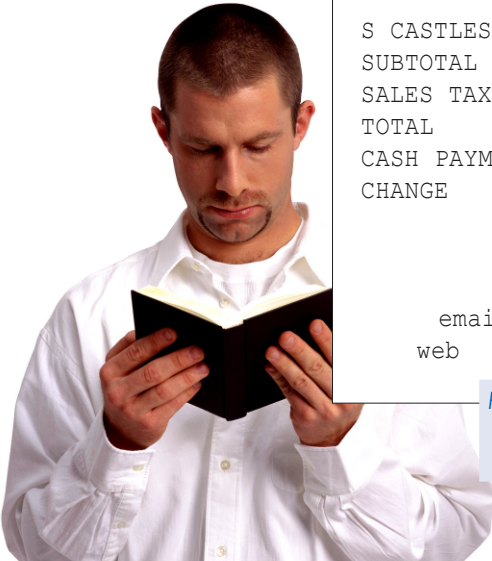
Customer Tracking sells for \$7.50/month

Customer Privacy

WordStock endorses the American Booksellers Association's "Booksellers Statement on Customer Privacy," adopted August 17, 1998:

The owners of this bookstore consider it our responsibility to you, and to the First Amendment, to respect the privacy of your choice of books, magazines and other material. We will not sell information identifying your purchases to a third party without your permission or otherwise disclose it to anyone, including the government, on our own initiative.

used with permission



CHEERY VALLEY BOOKS		
21 Eisenhower Avenue		
339 Reg80 12:15 03/17/11		
Sales for Customer 3241		
S CASTLES OF THE LO 1 @	24.95	24.95
SUBTOTAL		24.95
SALES TAX - 5%		1.25
TOTAL		26.20
CASH PAYMENT		30.00
CHANGE		3.80
tel 617-921-1476		
email cheeryvalley@isp.com		
web www.cheeryvalleybooks.com		

Receipts confirm that transactions have been logged into customers' purchase histories.

Tracking Customer Purchases

Tracking a customer's purchase is as easy as entering the word "track," followed by the customer's number, in the command line of WordStock's POS program.

If you prefer, your system can be modified so that it's default mode is that all sales are tracked.

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Enter a customer# or one of the following commands:
NS - Search the customer file by name
NEW - Create a new customer record
ACN - Assign a new customer number
Q - Quit, cancel customer tracking
Up, Down, F9, ENTER

Total
scent SellPrc Qty Extend

Reg# 2 Items in
ISBN/SKU Title
0684850265 FALL

Commands
Today's date is 03/26/99 O.K.? Y
Enter your cashier number : 1
Enter customer# of customer to track: ?

Messages:

Commands
Enter a command, SKU, or ISBN : 0684850265
Enter a command or quantity :

Messages:
Tracked
    
```

Viewing Customers' Purchase History

Customer Tracking allows you to view sales data that has been tracked. There are 3 ways to look at the data: by customer record, by inventory record, by Section.

A customer search can be done by customer name or number. Once you have chosen a customer, you may look at expanded customer information, or go right to viewing their purchase history. Purchase history may be viewed by section, receipt, or title. Searching by customer number will match only that one customer. Searching by name allows you to scroll through customers to find the correct one.

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PROGRAM TO VIEW CUSTOMER PURCHASE HISTORY
Purchase History searches: Customer
CUST# 2356: JOHNSON,DONNA E C/O CAMBRIDGE EDITING ASSOC. CAMBRIDGE MA 02138
Browsing - [Press <F9> to stop browsing]

Section          #Sale #Retn  Total   Total   Total   Total   Date
                  Rcpts Rcpts  Units   List$   Sell$   Disc$   LastSold
TRAVEL EUROPE    2     0      3      54.00   54.00           09/08/98
PETS GENERAL     1     0      1      24.95   24.95           09/28/98
End

PROGRAM TO VIEW CUSTOMER PURCHASE HISTORY
Purchase History searches: Customer
CUST# 2356: JOHNSON,DONNA E C/O CAMBRIDGE EDITING ASSOC. CAMBRIDGE MA 02138
Browsing - [Press <F9> to stop browsing]

Reg  RcptNum   Date      Time          Total  Total $  Total $  Total  Payment
  1    5 09/08/98 04:15 PM    Qty   at List  at Sell  Disc $
  1    6 09/08/98 04:18 PM    1    18.00   18.00           CASH
  1    7 09/28/98 09:50 PM    2    36.00   36.00           CASH
  1    1    7 09/28/98 09:50 PM    1    24.95   24.95           CASH
End

F9=Stop
    
```

An inventory search may be done by *Title*, *Author*, or *ISBN/SKU*. Searching by *ISBN/SKU* will match only that one inventory record. Searching by title or author allows you to scroll through inventory records to find the correct one.

You may want to know who purchased a particular book because the author has a new title coming. Simply enter the title and a listing of all customers who purchased it will be displayed.

```
PROGRAM TO VIEW CUSTOMER PURCHASE HISTORY
Purchase History searches: Item
Item Search: Title Author ISBN/SKU Quit
Search through inventory records by title
```

```
PROGRAM TO VIEW CUSTOMER PURCHASE HISTORY
Purchase History searches: Item
- Inventory file information -
TITLE : PARIS GREEN GUIDE          SKU: 2-06-135503-X
AUTHOR: MICHELIN                   ON HAND:      7
UND: MICHELIN TRAVEL PUBLICATIONPUB DATE: 10/96 NT:  ON ORD:      0
SEC1: TRAVEL EUROPE                PRICE1 : 18.00
SEC2:                                PRICE2 :
PROD: TRADE PAPERBACKS             IMPRINT:
SPECIAL COMMENTS: KEEP ON COUNTER

Press F8/F10/ENTER to select the displayed item or use arrow keys to search
```

```
PROGRAM TO VIEW CUSTOMER PURCHASE HISTORY
ISBN/SKU: 206135503X   Title: PARIS GREEN GUIDE
Author: MICHELIN      Price1: 18.00
Press F8
Browsing - [Press <F9> to stop browsing]

Reg#  Receipt#  Date      Qty  List  Sell  Cust#  Customer Name(Last,First)
-----
1      5      09/08/98   1   18.00 18.00  2356  JOHNSON,DONNA E
1      6      09/08/98   2   18.00 18.00  2356  JOHNSON,DONNA E
1      10     03/31/99   1   18.00 18.00   27   BABS,BETTY
1      11     03/31/99   1   18.00 18.00   22   GRAVES,THOMAS
End

F9=Stop
```

```
PROGRAM TO VIEW CUSTOMER PURCHASE HISTORY
Purchase History searches: Section
Section Search:

Sections
TRAVEL AFRICA AND MIDEAST  512
TRAVEL ASIA AND AUSTRALIA  513
TRAVEL CANADA
TRAVEL CA
TRAVEL EA
TRAVEL EU
TRAVEL MA
TRAVEL ME
TRAVEL PA
TRAVEL UN
ENTER=Se

PROGRAM TO VIEW CUSTOMER PURCHASE HISTORY
Purchase History searches: Section
Section #: 511, TRAVEL EUROPE
Browsing - [Press <Enter> for more information or <F9> to stop browsing]

CustNum  Customer Name  #Sale #Retn  Total  Total  Total  Total  Date
          Name    Rpts Rpts   Units List$  Sell$  Disc$ LastSold
-----
2356     JOHNSON,DONNA  2     0     3     54.00  54.00         09/08/98
End

Enter=Expanded  F9=Stop
```

You can also find all customers who've purchased anything from a given *Section*, simply by scrolling down the displayed listing of your *Sections*, choosing the one you want to examine, and pressing enter.

You'll immediately see a listing that includes the customer's number and name, the number of purchases and returns, the total units purchased, and the value of those sales in list price, sell price, and discount.

Finally, the last date the customer purchased from the *Section* is shown.

Customer Tracking Reports

Like all WordStock programs, *Customer Tracking* supports custom report generation, so you can view information about your customers in ways that are most meaningful to you. You can either view reports on-screen or print them.

The top examples show a listing of all customers, arranged according to their customer numbers, and clearly shows a summary of each customer's purchases.

Alternatively, you might want a report of *all* the purchases that *all* of your customers have made, as shown in the second sample.

Customer Report of Section sales								Viewing # 1 of 39	
CUST#	SRC	SEC	SALES	REFUND	TOT LIST\$	TOT QTY	TOT SELL\$	TOT DISC\$	LASTDATE
1	1	999	1		45.90	2	39.02	6.88	19960517
2	1	999	1		45.90	2	39.02	6.88	19960517
4	1	220	1		15.00	1	15.00		19960623
4	1	221	1		10.95	1	10.95		19960623
5	1	555	1		39.75	5	31.80	7.95	19970613
6	1	126	1		12.95	1	12.95		19960220

Customers & Sections						Viewing #22 of 39			
CUST#	LAST NAME	SEC	SEC NAME	TOT QTY	TOT SELL\$				
24	PRESTON	800	COOKING/GENERAL	4	63.84				
24	PRESTON	820	SCIENCE FICTION/FANTASY	1	6.99				
27	BABS	555	BUSINESS MANAGEMENT/LEADE	21	133.56				
29	SMITH	50	FICTION	1	12.00				
32	BENNO	25	HARDCOVER NON FICTION	2	49.90				
32	BENNO	820	SCIENCE FICTION/FANTASY	1	6.99				
1234	SMITH	555	BUSINESS MANAGEMENT/LEADE	4	25.44				
2356	JOHNSON	511	TRAVEL EUROPE	3	54.00				
2356	JOHNSON	541	PETS GENERAL	1	24.95				
12345	FRANCO	25	HARDCOVER NON FICTION	3	37.44				
22844	MCCAMLEY	104	NEW FICTION	2	11.66				
22844	MCCAMLEY	996	SPECIAL ORDERS STOP ORDER	8	36.00				
22844	MCCAMLEY	101	TRAVEL GENERAL	2	19.35				
22844	MCCAMLEY	705	GREETING CARD AREA	11	27.50				
22844	MCCAMLEY	820	SCIENCE FICTION/FANTASY	3	20.97				
22844	MCCAMLEY	95	CALENDARS MISC	5	175.00				
22844	MCCAMLEY	999	NEW STUFF	18	32533.29				
22844	MCCAMLEY	501	REFERENCE COLLEGE GUIDES	9	19.32				
TOTALS:								188	41918.59

Messages:
PgUp PgDown Up Down Home End F9 F10

You can create a wide variety of reports by defining your own custom report formats

WordStock Customer Purchases Customer

CUST# 8: SMITH, JANE 18 MAIN STREET CAMBRIDGE MA 02138

Browsing - [Press <F9> to stop browsing]

Section	#Sale Rents	#Retn Rents	Total Units	Total List \$	Total Sell \$	Total Disc \$	Date Last Sold
FICTION							
CLASSICAL HISTORY							
COMPUTERS - HARDW							
EDUCATION							
MISCELLANEOUS							
End							

WordStock Customer Purchases Customer

CUST# 8: SMITH, JANE 18 MAIN STREET CAMBRIDGE MA 02138

Browsing - [Press <F9> to stop browsing]

ISBN/SKU	Title	Author	Sell Price	Date Last Sold
0471641979	BUTTERFLY CUSTOMER	ODELL, PAJUNEN	22.36	06/30/10
0300000316	DAILY LIFE IN ANCIENT ROME	CARCOPINO, J	15.00	07/30/10
1566041309	MACWORLD & EXCEL DESKTOP	LICHTY, T	24.95	07/30/10
			5.95	05/30/10
			19.00	07/30/10
			19.00	07/30/10
			5.95	07/30/10
			5.95	07/30/10

WordStock Customer Purchases Customer

CUST# 8: SMITH, JANE 18 MAIN STREET CAMBRIDGE MA 02138

Browsing - [Press <F9> to stop browsing]

Reg	RcptNum	Date	Time	Total Qty	Total at List	Total at Sell	Total Disc \$	Payment
80	37	06/30/10	10:10 AM	1	27.95	22.36	5.59	NONE
80	38	07/30/10	6:15 PM	4	60.90	60.90		NONE
80	39	07/30/10	2:37 PM	4	43.95	43.95		NONE
End								