WordStock

Working with Data Files

Overview

WordStock is designed to help you to manage your business by managing information about your business more effectively. WordStock stores the information about your business in data files that define the essential categories needed to locate, order, and sell merchandise:

Products — what kind of merchandise is it?

Sections — what are special characteristics of it?

Vendors — who makes it?

Customers — who's buying it?

Inventory File pulls all these pieces together into one record and tracks the item's stock level, as well as its ordering, receiving, and selling history.

WordStock supports up to **99 Product**s and **999 Sections** categories that you can create yourself; *Product* and *Section* categories are equivalent to the *Department* and *Classification* terms often used in general retail. There's no practical limit, other than the capacity of your system's hard drive, to the number of vendors, customers, and items you can track.

WordStock is a *real-time* system, so all information is up-to-the-second. You don't have to wait until the end of the day to see what's going on because, as soon as an item is ordered, sold, received, or returned, the change is re-corded instantly throughout the system. Similarly, as items are received and "put on hand," their records show the new stock level, so that you have a reliable indication of stock availability when customers inquire.

All WordStock programs use the same commands, so that the **F4** key always enables you to modify information, the **F10** key is used to access the com-mand mode and save changes, *etc*. Finding information is fast and simple because WordStock uses intuitive commands, such as **T** for *title* and **A** for *author*. To keep things simple, commands are the same throughout, and every program has **help** screens to assist you.

Inside this document you'll find plenty of screen images that convey the functionality of WordStock's various data files, as well as expla-nations of how their many features can benefit you and make your job easier.
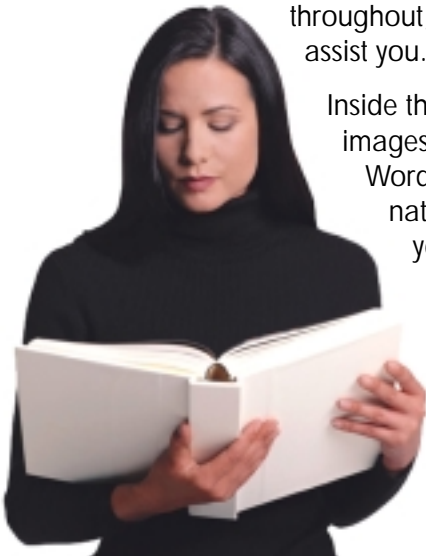
Integration & Workflow

WordStock is designed to emulate the way that real people really work by collecting information from several sources and melding it into one finished document.

In order to achieve this, we've designed WordStock's data files to connect to each other and to all operational programs, such as POS and ordering. so you can maneuver through the program without having to exit to the main menu

For example, from within the POS program, you can load the *Inventory File*; from within that, you can load *Keyword Search*; then, from within *Keyword Search*, you can find an item and place an order for it.

If need be, you can layer the *Customer File* program over the *Special Order* program, all from within *Keyword Search*. After you've made the special order, you can return to the *POS* program with a few keystrokes.

Finally, you can switch to *Ordering* and edit the order before transmitting it electronically.

Similarly, *Customer File* works interac-tively *with Mail Order, Customer Track-ing, and Customer Loyalty*, to minimize data entry and jumping around.

The ease-of-use of WordStock's basic functions make it very easy to learn. Yet, once you've mastered the basics, you'll find advanced features that we've designed to streamline the management of your store's operations.

Inventory Record

The *Inventory* record is the heart of WordStock: it's where the description and history of all items in inventory are maintained.

The top third of the record displays identifying information about the item. The *ISBN/SKU, Title,* and *Author* fields are indexed and support real-time lookups on all characters. WordStock calculates the ISBN's check digit to confirm its validity.

A separate *alternate SKU* field [not shown in the sample] allows you to assign a second identifier, such as a UPC or a vendor's stock number, to an item.

The middle third summarizes the item's ordering and receiving history: identifying numbers for the last four purchase orders are displayed, as well as the dates, invoices, and discounts of the last two receiving sessions. Sales, purchase, and return quantities are shown for the current and previous years, so you can compare performance at a glance.

The *Special Comments* field holds 22 characters and is completely searchable via *Keyword Searching.* An optional utility allows you to maintain, display, and print additional information about each item.

To simplify finding items in your inventory, and to save space, WordStock includes a unique built-in abbreviation dictionary for words that occur frequently, such as *introduction* [INTRO] and *American* [AMER]. You don't have to worry if an item's title or description was abbreviated, just enter the word and WordStock will find it.

As shown in the second set of screen images, the *Inventory Record* is functionally linked to other WordStock's programs, so you can perform several tasks from within the *Inventory Record*.

All of the commands shown are "executable" commands: you initiate the action by pressing the highlighted letter's key or by scrolling to a command and pressing *enter*.

Screen Terminology

NT: "new title/item indicator": interacts with receiving program to alert the receiver that an item will be in stock for the first time;

FRP & **FRQ**: "fixed reorder point" and "fixed reorder quantity": used for setting min/max levels for items that you want to stock

Q O/S: year-to-date "quantity over or short"

Date 1st: date first received

Date Last: the last date the item was sold

Alt Vnd: "alternate vendor": the identifying number for a second vendor; often used to indicate a distributor or wholesaler. Purchase orders can be configured to use the alternate vendor as the primary source.

Specs and **Holds** : "specials" and "holds": the number of pieces for which you've placed special orders, and the number of pieces of actual in-stor stock that's been committed to customers. These fields work interactively with the *Special Order* and *POS* programs and are updated automatically.

Rst Date Qty: "restock date and quantity" the number of pieces sold since the last restock report

Basic Inventory Record

The *Basic Inventory* record is a simplified version of the *Master Inventory* record and displays only the essentials identifying information about an item:

SKU;
Title;
Author;
Quantity on-hand and on-order;
Product/Section1/Section2, by both name and number;
Vendor name and number.

Note that *Product* and *Section* names are displayed, as well as stock on-hand and on-order.

Because of its simplicity and clarity, the *Basic Inventory* record is particularly useful for handling customer inquiries quickly.

In the *Basic* screen, records are view-only and cannot be modified.

Creating inventory records

In order to create an inventory record, you need to provide six key pieces of information:

An *ISBN* or *SKU*;
a *title* [or item description];
an *author* [or other lookup descriptor]
a *Product* [Department] category;
a *Section* [Class] category; and
a *Vendor*.

Once you've entered these pieces of information, you can order, receive, and sell the item.

NB: *If you don't have an in-store system, please contact Sales to discuss the various ways we can work with your wholesale supplier to creat an opening database for you. If you already have an inventory control system, and are considering switching to WordStock, please contact Sales to discuss data conversion options.*

Product File

WordStock *Products* are broad catego-
ries used to classify inventory items
according to their most general
characteristics, that is, the kind of items
they are, such as *Hardcover Books*,
Stationery, or *Jewelry*. *Products* are
analagous to "Departments".

WordStock supports up to **99** different
Products, so you can classify even the
broadest range of merchandise.

Sales, purchases, returns, as well as
transfers in/out of branch stores, are
shown in both units and currency the
current and previous two years, so you
can see instantly how a Product is
performing, compared to its historical
trend.

The *markup* and *discount* fields have
real-time interaction with WordStock's
POS program, so you can run seasonal
promotions, such as "20% off all
calendars" without having to re-ticket all
calendars: the sale price will ring through
automatically for the duration of the
promotion. Then, using Product File reports,
you can recap and analyze the promotion to
assess its success.

Product File Reports

With WordStock's report generator, you can quickly
analyze how your overall product mix is performing;
in this example, we've listed all *Products*, in
descending order, based on their total year-to-date
sales. We can see instantly that there may be
room for adjustment, by allocating more buying
funds for some product lines, while cutting back on
others.

Note that the report is shown on-screen, i.e., *it
does not have to be printed.*

Section File

WordStock's *Section File* is typically used to categorize merchandise according to more specific criteria than the *Product File*, so you can use it to:

- Describe the subject category of a book: "New Fiction;"

- Define the classification of a CD: "Gospel Music;"

- Track the type of metal used in a piece of jewelry: "Silverwork."

Some stores use the *Section File* to denote store locations, such as "Display Window 1" or "Tables in Front." WordStock suports up to **999** *Sections*, each of which you can define yourself.

```
Section          Section Name
50               FICTION
Lit  Section          Section Name
     546              SCIENCE/ MATH/ ASTRONOMY
On   Lit
     On   Section          Section Name
On   On   937              HEALTH ALTERNATIVE MEDICINE
On   On   Linear Feet          Category           Cur. Year   Last Year   Two Years
On   On   On Hand          Q   Sales                512       1,917
               375        T   Purchases            560       2,050
                          Y   Returns                4         140
On   On   On Hand ($)          Transfers In
               5,690.90         Transfers Out
Dis  Di   On Order         $   Sales            7,930.92   32,826.05
               143        $   Purchases        9,019.39   34,757.10
Comm  Di  On Order ($)     $   Returns            67.00    2,971.22
               2,128.35        Transfers In
                              Transfers Out
Comm      Discount %   Markup %   Comments:

Command: N   Message:                              Mode: DISPLAY
```

```
Listing of Sections & Sales                          Viewing #181 of 203

SEC SEC NAME                    OH QTY       OH_DOL    OO QTY      OO DOL

730 HISTORY US                     199      4053.33        26      491.35
750 HISTORY WORLD                  268      6370.17        95     1900.33
700 ART COLLECTIONS                624     25210.72       128     5120.71
702 ART ESSAYS                      38      1000.85
704 ART GRAPHIC ARTS               100      3455.08        21      700.58
703 ART HISTORY                    102      4043.05         7      282.05
701 ART INSTRUCTIONAL              218      4600.97       114     1636.20
 52 LITERARY CRITICISM              20       402.40         1       16.95
912 MYTHOLOGY AND FOLKLORE          60       903.72        14      270.24
040 ANTIQUES                       301      0974.09        72     1093.27
943 NATIVE AMERICAN                 27       454.75
 12 AUTOGRAPHED BOOKS               89      4173.90
837 AUTOMOTIVE                     262      4714.87        98     1875.33
915 ASTROLOGY                      166      1965.56        15      200.35
541 PETS GENERAL                   541      8941.45       120     2037.88
545 NATURE                         213      4391.50        55      941.64
544 NATURE/MARINE LIFE              65      1563.46        24      367.90
950 EDUCATION                      170      2482.52        31      519.55
TOTALS:                          98567   1273122.00     27864   375690.46
Messages:  _
PgUp PgDown Up Down Right Home End F9 F10
```

Section File Reports

Like the *Product File*, WordStock's *Section File* is completely accessible via report generation, so you can have the information you want in the format you prefer.

In this sample report, we've simply specified that we wanted to see all Section, arranged in order of Y-T-D sales performance.

As with other WordStock reports, the report can be viewed on-screen and saved.

Vendor File

WordStock's *Vendor File* is where information about all of your suppliers resides.

Vendor File supports the three addresses you need to manage vendor relationships: where the order is sent, where returns are sent, and contact information for your sales representative. Postal codes supported include US, Canadian, UK, and user-defined.

In addition to current stock and order status, *Vendor File* displays a real-time, 2-year history of key activity: sales, purchases, returns, and transfers, in both units and currency.

The *freight* field displays a summary of all shipping charges that have been logged through the *Receiving* program.

Vendor File provides a field for your store's account information and a separate place to list the *A/P* account number you've assigned to the vendor. The *AP Vendor #* field is handy if you export information from WordStock to an external accounting system that uses its own numbering scheme.

Vendor File Reports

With WordStock's report generator, you can see how your vendors are performing; in this example, we've listed all *Vendors*, in descending order, based on their total year-to-date purchases and sales, and have compared them to last year's purchases and sales. Therefore, we have a quick recap of "sell-through" and can determine quickly which vendors have the strongest line and which might need reassessment.

Customer File

Customer File is where WordStock stores contact and sales information about your customers. *Customer File* works interactively with *Mail Order*, as well as *Customer Tracking* and *Customer Loyalty*, so you don't have key in data repeatedly.

As the screen inage shows, you can classify customers according to *Type*, such as *Teacher* or *Senior,* and *Source*, such as *Catalogue* or *Web*. You can also assign a discount that works interactively with *Mail Order.*

You can assign customer numbers yourself, or have Wordstock automatically assign the next available number; the *number* field holds up to seven characters, so you can use customers' phone numbers to identify

Marketing with Customer File

Like other WordStock data files, *Customer File* works with WordStock's custom report generation, so you can sort the file according to your own criteria. Then, you can use the resulting report to market your store, by printing mailing labels to affix to your direct mail pieces.

For example, you can use *Customer File* to determine whom you should send newsletters, sales flyers, catalogues, *etc.* to customers, or whom to invite to special events, such as in-store signings or previews for new items.

When your customers are entered into your database, you can note their areas of expressed interes; this enables you to make your mailings more targeted.

Whenever you print customer labels, you have the option of appending a mailing code, so you can track the effectiveness of your promotions.

If you're using WordStock's *Customer Tracking* and/or *Customer Loyalty* programs, you can view summaries of customers' purchase activities.

You can assign customer numbers yourself or have WordStock automatically assign the next available number.

System Operation & Navigation

WordStock uses a simple menu structure with "hot keys" for each command: just press the hot key to be taken to that program. Alternatively, you can use the up and down arrow keys to move through menus.

WordStock uses a consistent set of commands from one program to another, so learning to use WordStock's primary functions is quick and easy for most people.
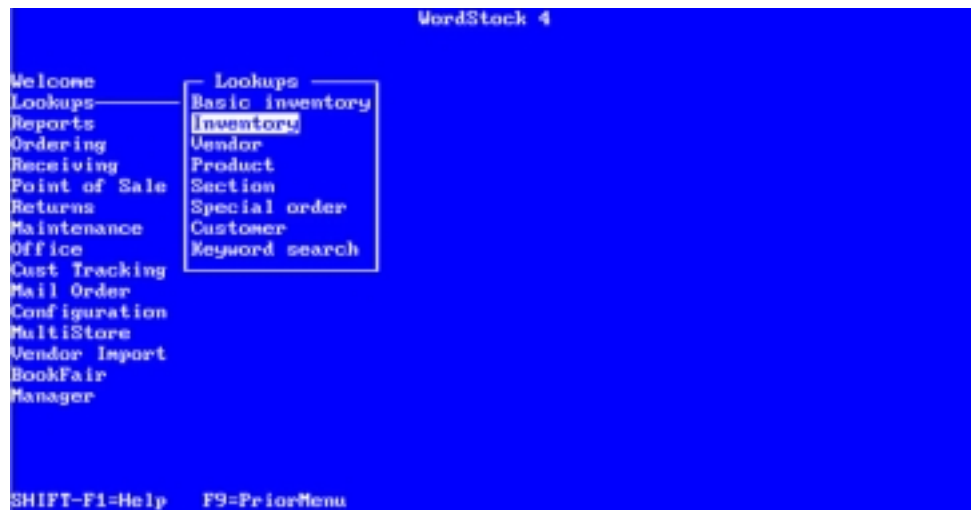
Within each program, **context-sensitive help** is a keystroke away: enter **a question mark** and WordStock displays a brief summary of the actions you can take in a given area. A second level of explanation, shown at right, is available by entering **shift-F1**.

Because different users have different levels of authority and responsibility, WordStock offers various levels of user access, including:

full access: the program can be displayed and activated and data fields can be modified;

view-only access: the program can be displayed and used, but can't be modified without a password;

no access: the program can't be displayed or activated without a password.

Please see our "System Installation & Training" *document for more information.*