

WordStock

Mail Order

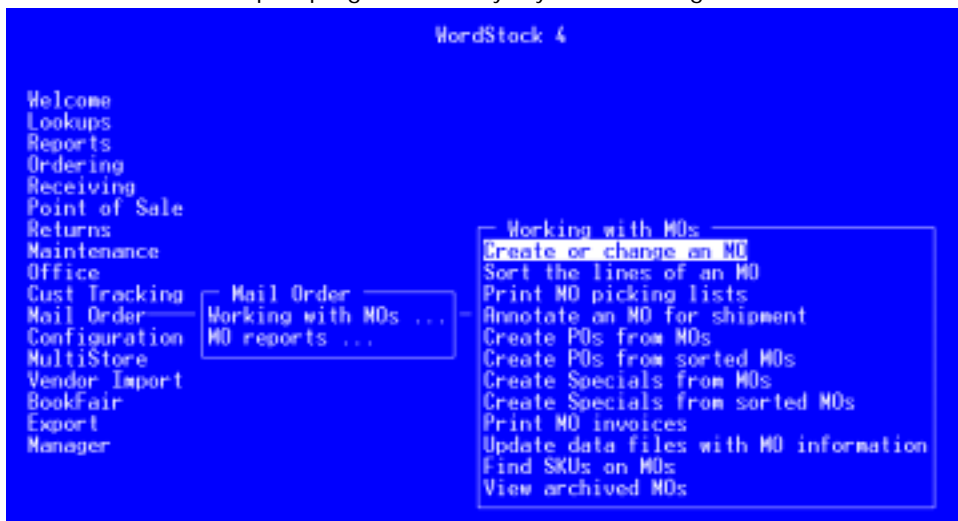
Overview

WordStock's *Mail Order* program makes fulfilling customer mail and phone orders quick and easy. *Mail Order* is ideally suited for stores that produce catalogues, newsletters, or other direct mail listings of items carried.

Mail Order works interactively with other WordStock data files, including the *Customer* and *Inventory* files, so data entry is kept to a minimum. For example, if you receive an order from a customer who's known to you, all you have to do to make a new mail order for that customer is to key in his or her name and the address information and order preferences, *e.g.*, credit card account info, will auto-fill.

Mail Order provides comprehensive tools to help you to manage the entire process. Look up orders by:

- customer name,
 - customer purchase order number,
 - order date,
 - order number,
 - delivery status, or
 - your own comments about the order.
- Quickly fill backorders by making special orders and/or purchase orders from mail orders.
 - Sell books and other merchandise by catalogue numbers that you assign.
 - Use electronic or voice authorization for credit card sales.
 - Print picking lists, packing slips, shipping labels, and invoices;
 - Manage orders with multiple shipments by maintaining a running payment history.
 - Use *Mail Order*'s report program to analyze your marketing efforts.



WordStock's main **Mail Order** menu

Summary of Mail Order process:

1. Enter the customer's number, from Customer File, or search Customer File for the customer by name, and select the customer with one keystroke;
2. Scan items into the order; alternatively, locate items via real-time lookup and add to the order with one keystroke;
3. Print a packing list to simplify assembling the order;
4. Annotate the order, noting which items will be sent immediately and which will have to be ordered;
5. Complete the order by noting any payment(s) received and printing a packing list and a mailing label;
6. Order any unfulfilled items, by making either special orders or purchase orders for them.

Mail Order and Credit Card Authorization

Most customers pay for mail ordered items with a credit card, so WordStock's Mail Order program includes full support of our Integrated Credit Card Authorization program.

When you're ready to ship an order, you can obtain an authorization electronically, using the CCA command, or get voice authorization with the VCE command.

Please note that Bank America Merchant Services, like most credit card processors, charges a slightly higher fee for authorizing mail orders because the customer is not present when the authorization is obtained.

Making a new mail order

To start a mail order, you first need to tell WordStock who the customer is. If the customer is new to you, you can make a new customer record, using WordStock's *Customer File* program from within *Mail Order*. After you've created the new customer record, you can return to *Mail Order* with one keystroke.

Alternatively, if the customer is already known to you, just enter the customer's last name, or the first few letters, and you can scroll alphabetically through the file. When you find a match, you can select the customer with one keystroke.

If you don't know the customer's number, type "cust" in the customer number field and a small window pops out, as shown at right.

Cu #:

Mail To:

1st:

Init:

Addr1:

City:

Taxbl:

State:

Region:

Country:

PC Type:

PC Code:

Customer file information

CUST# : 2 NAME: KELLY

ADDR1 : 57 HIGHLAND STREET

ADDR2 :

CITY : LYNN

STATE : MASSACHUSETTS

COUNTRY: USA

HOME :

COMMENT:

1ST: JEAN

PRE:

TITLE:

TAX: #:

PC CODE: 02144

REGION:

PC TYPE:

WORK :

Press F8 to select displayed customer

SKU/CAT#	Qty	S	I	T	Disc%	Price	Author	Title	O/H	O/O
----------	-----	---	---	---	-------	-------	--------	-------	-----	-----

COMMAND: NEW MESSAGE:MODE: DISPLAY

Add *Customer File* information with one keystroke

Adding items to the order

If you know the item's ISBN, SKU, or Catalogue number, enter it and WordStock will automatically fill in the item description and calculate all charges. If you don't know it, you can search the *Inventory File* by Title or Author; when you find the item you need, add it to the order with one keystroke.

If you use barcode scanners in your store, you have the option of collecting the order's merchandise from shelves and stockrooms and adding them to the order by scanning their barcodes.

Cu #:

2 Mail To: KELLY

1st: JEAN

Init:

Addr1: 57 HIGHLAND STREET

Taxbl:

City: LYNN

State: MA

Region:

Country: USA

PC Type:

PC Code: 02144

Cu # :

2 Name: KELLY

1st: JEAN

Init:

Addr1: 57 HIGHLAND STREET

City: LYNN

State: MA

Comm:

Ph#1:

TX:

M.O. #:

74 Date:05/29/02 Disc:

Type:

Status: 0 Rate:

Can Date:

Pmt :

Comm:

TX:Y

Meth Pmt:NONE

Act#:

Exp Date:

Lines:

Approval:

Cust POW:

Taken By:B

Line1:

Ship Via:UPS

Ship Chg:

Tax:

Sub:

Tot:

Ship Date:

SKU/CAT#	Qty	S	I	T	Disc%	Price	Author	Title	O/H	O/O
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COMMAND: NEW MESSAGE:MODE: MODIFY

Mail Order enables you to search your inventory and add items with one keystroke

Picking Lists

Printing a picking list gives you the opportunity to assemble the items for the order: just walk through the store or stockroom, and check off items as you collect them.

Annotating Mail Orders

Using the picking list, you annotate the order to confirm that the merchandise was in stock and will be sent.

Alternatively, if you don't want to use picking lists and/or know that the merchandise is available, you can use a 'ship as ordered' command in lieu of annotation.

Cu #:

2 Mail To: KELLY

1st: JEAN

Init:

Addr1: 57 HIGHLAND STREET

Taxbl:

City: LYNN

State: MA

Region:

Country: USA

PC Type:

PC Code: 02144

Cu # :

2 Name: KELLY

1st: JEAN

Init:

Addr1: 57 HIGHLAND STREET

City: LYNN

State: MA

Comm:

Ph#1:

TX:

M.O. #:

74 Date:05/29/02 Disc:

Type:

Status: 0 Rate:

Can Date:

Pmt :

Comm:

TX:Y

Meth Pmt:NONE

Act#:

Exp Date:

Lines:

Approval:

Cust POW:

Taken By:B

Line1:

Ship Via:UPS

Ship Chg:

Tax:

Sub:

Tot:

Ship Date:

SKU/CAT#	Qty	S	I	T	Disc%	Price	Author	Title	O/H	O/O
0516263250	B				I 10.00	9.95	KENT,D	BOSTON		5

COMMAND: TI MESSAGE: Press F8 to add displayed recordMODE: DISPLAY

Real-time *on-hand* and *on-order* units are shown

Making Purchase Orders from Mail Orders

If a customer wants an item that's not in stock, you can order it by creating a special order.

More typically, however, you'll work in batches and will create a purchase order, or individual special orders for all out-of-stock items in a given batch of mail orders.

WordStock streamlines both processes by enabling you to create purchase or special orders from outstanding mail orders with a few keystrokes: just enter the mail order number(s) or select 'All' and WordStock will create orders for all backordered items.

Payment History - M.O.N 78					
THIS SHIPMENT			ORDER HISTORY		
Shipment Total		45.95	Original Order Total		45.95
Unposted Pmts.		45.95	Shipped To Date		
		-----	Posted Non-A/R Pmts.		
Balance Due		0.00	Accounts Receivable		
Date	Posted	Amount	Method	Account	Exp Approval
06/05/02	No	45.95	VISA	4326267598127575	03/05
<u>Browse</u> New Quit					

The order's payment history is updated automatically when a credit card transaction is authorized.

Recording Payments

Credit card payments are recorded when you have the transaction authorized.

Sales taxes and shipping charges are auto-matically added, or not, as indicated by your system's set-up and the customer's tax status. (This means that you don't have to worry about accidentally charging tax-exempt customers.)

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When you're ready to ship an order, you can obtain an authorization electronically, using the **CCA** command, or get voice authorization with the **VCE** command.

Note: Bank America Merchant Services [BAMS], like most credit card processors, charges a slightly higher fee for authorizing mail orders because the customer is not present when the authorization is obtained.

MAIL ORDER CREATION COMMANDS			
OLD - Look up old MO by number	LMO - Display last MO		
NEW - Create a new MO	PRI - Print pick list		
AMO - Assign a new MO number	SRI - Sort the lines for MO		
MOD - Modify current MO	I - Search lines for ISBN		
ANO - Annotate MO shipment	A - Search lines for author		
DEL - Delete current MO	T - Search lines for title		
BEG - Go to the beginning of MO	C - Search lines for catalog#		
END - Go to the end of MO	S - Invoke MO search menu		
PRE - Show previous page of MO	TI - Search inventory by title		
NEK - Show next page of MO	AI - Search inventory by author		
STA - Change MO's status	MTA - Add MAIL TO as customer		
TAX - Recalculate MO's tax	CUN - Create new customer record		
CHK - Check title,auth,price	CUO - Modify an existing customer		
PR1 - Inv price1 to all lines	NC - Search by customer name		
PR2 - Inv price2 to all lines	NCS - Continue customer name search		
P - Record new payment	CS - Search by customer #		
PH - View payment history of MO	CCS - Continue customer # search		
PPH - Print payment history of MO	CCA - Authorize Credit Card purchase		
IH - View invoice history of MO	CCV - Void Credit Card purchase		
PIH - Print invoice history of MO	VCE - Voice Authorize Credit Card		
IND - Insert DISC, all lines	S1 - Toggle Order# / taxDisc% screen		
CLD - Clear DISC, all lines	SS - Search Special Order by SKU		
KW - Load keyword search program	FMO - Find Mail Orders for an ISBN/SKU		
INV - Load inventory screen	Q - Quit this program		
SPC - Load Special Order screen			

Each command shown has an assigned 'hotkey' that executes the command with one keystroke

Mail Order Reports

As shown in the top illustration, *right*, *Mail Order* offers the same free-form report generation as other WordStock programs so you can tailor reports to your exact needs.

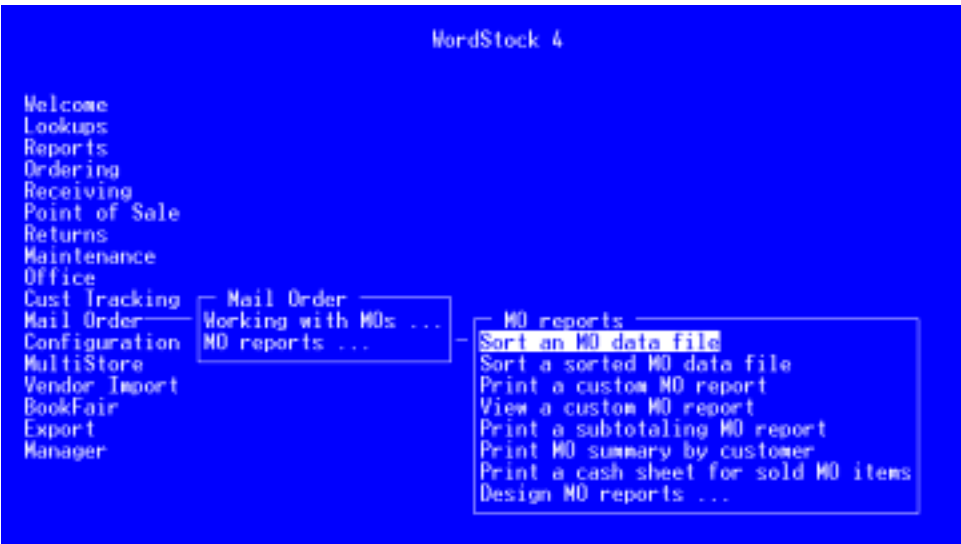
Mail Order reports fall into two broad categories: “header reports” which tell you about customers and their orders, and “detail” reports which you tell you about the items customers ordered.

The center illustration displays the fields available in header reports. Since reports are completely user-defined, you can combine these fields in ways that are meaningful to you.

For example, you can make a report of all customers living within a certain postal code who spent more than a specified amount in the last year.

As shown in the bottom illustration, you can display reports on screen if you’d rather not print them. Since the ‘sort include specifications’ that you create remain in your WordStock report library, you can run reports regularly to monitor the growth of your mail order business.

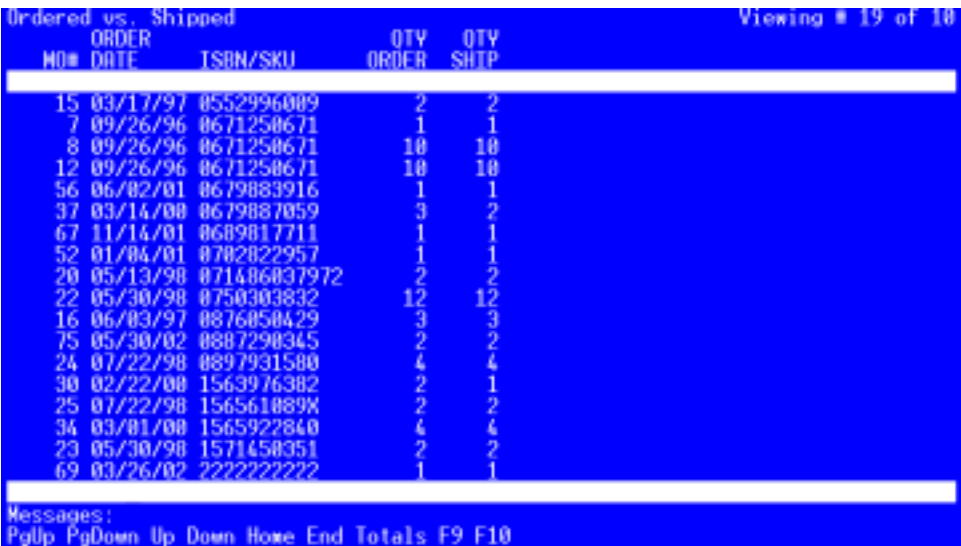
- Mail Order costs US\$25/month



Mail Order’s Reports menu



Fields available when making a report of *Mail Order* ‘header’ information



Sample *Mail Order* report, as shown on-screen