Update to WordStock Transfers Module with Exporting

This optional module allows transfer outs and transfer requests to be sent to other stores. Transfers can be sent via dial-up modem or TCP/IP.

In addition to changes to the transfer program itself, WordStock has added a "Maintain Store file" (**Main menu -> Transfers -> Maintain Store file**) program that enables you to manage stores to send/receive data to/from, as well as to configure the modem phone number or TCP/IP address that will be used to send the transfers to other locations.

The Transfer program uses several new commands:

<PRT>   prints the Transfer

<RMV>   **removes the transferred out quantities** *on a transfer out* **from the inventory record's onhand field**

<ONH>   adds items on a Transfer to inventory

<EXP>   exports the Transfer to a remote location. (only used when using the export functionality)

<FXF>   loads the Transfer find program to find all instances of a SKU on a transfer

<MRG>   toggles between merging quantities or not when duplicate SKUs are entered

<INV>   toggles between the Transfer screen and the mini-inventory screen

The inventory screen (**Main menu -> Lookups**) offers the **FXF** command as well searching for SKUs on transfers

Creating a Transfer Out

Type <**new**> and press <**Enter**>. Status CREATING will be assigned to the Transfer , as well as Step NONE. The first thing to do is select which location to export the Transfer to.

Use the up and down arrow keys to move to the location and press <**Enter**> to select.

The Step field explains where in the export process a Transfer is:

NONE	Transfer is created, no export has been attempted.
EXPORTING	Transfer is in the process of being exported, or an attempt to export it has temporarily failed.
EXPORTED	Transfer successfully created at remote location.
IMPORTED	Transfer received successfully from a remote location.
IMPORTING	Transfer is in the process of being imported, or an attempt to import it has temporarily failed.

The Status field explains the state of a Transfer :

CREATING	New Transfer, no attempt to export.
PROCESSING	Transfer is in process of exporting, or export has failed.
PROCESSED	Transfer has been successfully exported.

The remaining fields are not required before saving. However, keep in mind that a Transfer *cannot* be exported without detail lines , *i.e.*, SKU and QTY). WordStock has included several fields for notes on a Transfer, including **Info1**, **Info2**, and **Note**.

• The Note field is the *only* field that may be edited after a Transfer has been updated to Step EXPORTED or IMPORTED.

• If a Transfer is for a customer and that customer is in the customer file, you may include their Cust# and name in the Transfer.

Next enter SKUs onto the Transfer . You may type or scan SKUs into the transfer. By default identical SKUs will be merged onto the same detail line and quantity will be automatically incremented. (This is the same behavior found in the receiving program.) If the SKU is not in inventory, the cursor will move to the title field of the mini-inventory screen. Create the record, press <**F10**> to save, and the cursor will return to the transfer detail line in the QtySh field. If merging is not appropriate for you, the behavior can be turned on and off. To toggle this functionality off/on, type <**mrg**> in the Command: box and press <**Enter**>. Once you have created a Transfer Out, press <**F10**> to save.

```
SKU:       0671250671     Title: ROAD LESS TRAVELED                        Pr: 2
Author: PECK,M                   Price1:  10.00 Price2:   5.00  Sections: 999/
Vend#:      671 <PUBLISHER 671     >  NT:  AltVend:          OH:    -8 OO:     2
PO1:PO     107PubDate:         Comments: CREATED AT POS       Imprint:
======================= PROGRAM TO MAINTAIN TRANSFER OUT =======================
Transfer Out#:         96 Date: 08/03/05 Reason: SPECORD      Status: CREATING
Transfer Req#:            Date:                               Step  : NONE
Transfer To - Store#:     2 Name: QA-STORE2                   Ship Via : UPS
                                                              Ship Date: 08/03/05
Lines:          1              Info1:                         Proc Date: 08/03/05
Line1:          1              Info2:
Note : FOR CUSTOMER VACATION, NEEDS BY AUGUST 6
Cust#:          1 Cu Name: HAPPY                     1st: GEORGE        Init: M
============================= Merge Quantities ==============================
  ISBN/SKU       |QtySh|QtyRq| List | Cost |      Title       |    Author   |Pr
0671250671       |    1|     |10.00 | 5.00 |ROAD LESS TRAVELED|PECK,M       | 2




COMMAND: █    MESSAGE:                                        MODE: COMMAND
```

To export, type <**exp**> and press <**Enter**> from the Command: box. The screen will redraw and display *connecting*, *file manager checking*, and *transferring* messages as the transfer is exported.

```
PROGRAM TO EXPORT TRANSFERS


Exporting transfer out# 96 to store 2' ...

Checking available transfer methods...

Attempting TCP/IP transfer to store# 2 (QA-STORE2)...
Checking status of file manager at store# 2... OK
File manager is running at store# 2 - Processing can continue.
Moving files to store# 2... Done.
Processing files at store# 2...
```

Once successfully sent to the other location, you will see the following when the transfer is created:

```
PROGRAM TO COMMUNICATE WITH REMOTE STORES


    ┌Processing files at QA-STORE2─────────────┐
    │  Converted transfer out to transfer in...│
    │                                          │
    └──────────────────────────────────────────┘











                Press any key to continue...
```

Press any key to continue.

Next, the acknowledgement of the Transfer is imported into your system. The screen will look like this:

```
Export of transfer succeeded.
Importing transfer acknowledgement from store# 2...Done.






















                        Press any key to continue...█
```

Press any key to continue.

A successful Transfer Out will have its Step updated to EXPORTED as shown below and there will be a message "Transfer Out exported":

```
║SKU:                  Title:                                        Pr:        ║
║Author:                      Price1:         Price2:        Sections:    /      ║
║Vend#:          <              > NT:  AltVend:          OH:       OO:           ║
║PO1:        PubDate:        Comments:                       Imprint:            ║
═══════════════════ PROGRAM TO MAINTAIN TRANSFER OUT ═══════════════════
 Transfer Out#:     96 Date: 08/03/05 Reason: SPECORD      Status: CREATING
 Transfer Req#:        Date:                               Step   : EXPORTED
 Transfer To - Store#:    2 Name: QA-STORE2                Ship Via : UPS
                                                           Ship Date: 08/03/05
 Lines:          1            Info1:                       Proc Date: 08/03/05
 Line1:          1            Info2:
 Note : FOR CUSTOMER VACATION, NEEDS BY AUGUST 6
 Cust#:         1 Cu Name: HAPPY                      1st: GEORGE       Init: M

   ISBN/SKU       |QtySh|QtyRq|  List  |  Cost  |      Title       |  Author  |Pr
 0671250671       |    1|     | 10.00  |  5.00  |ROAD LESS TRAVELED |PECK,M    | 2



 COMMAND: █    |MESSAGE: Transfer Out exported.                   MODE: COMMAND
```

When the SKU has physically been sent out from your location, type **<rmv>** and press **<Enter>** from the Command: box to remove the item from inventory:

```
║SKU:                    Title:                                              Pr:   ║
║Author:                         Price1:         Price2:          Sections:    /    ║
║Vend#:           <              > NT:  AltVend:          OH:       OO:             ║
║PO1:          PubDate:        Comments:                       Imprint:            ║
╠═══════════════════ PROGRAM TO MAINTAIN TRANSFER OUT ══════════════════════════════╣
 Transfer Out#:        96 Date: 08/03/05 Reason: SPECORD         Status: CREATING
 Transfer Req#:            Date:                                 Step  : EXPORTED
 Transfer To - Store#:     2 Name: QA-STORE2                     Ship Via : UPS
                                                                 Ship Date: 08/03/05
 Lines:         1                 Info1:                         Proc Date: 08/03/05
 Line1:
 Note : F│ Do you wish to remove transferred qtys from inventory? Y│
 Cust#:  └──────────────────────────────────────────────────────────┘    Init: M

   ISBN/SKU        │QtySh│QtyRq│  List │  Cost │      Title       │  Author  │Pr
 0671250671        │    1│     │ 10.00 │  5.00 │ROAD LESS TRAVELED│PECK,M    │ 2



 COMMAND: RMV MESSAGE:                                           MODE: COMMAND
```

Answer **<Y>** and the Transfer items will be taken off hand.

The Transfer's Status will be updated to PROCESSED and there will be a message "Transfer items removed from inventory":

```
║SKU:                    Title:                                              Pr:   ║
║Author:                         Price1:         Price2:          Sections:    /    ║
║Vend#:           <              > NT:  AltVend:          OH:       OO:             ║
║PO1:          PubDate:        Comments:                       Imprint:            ║
╠═══════════════════ PROGRAM TO MAINTAIN TRANSFER OUT ═════════════════════╗═══════╣
 Transfer Out#:        96 Date: 08/03/05 Reason: SPECORD        ║Status: PROCESSED║
 Transfer Req#:            Date:                                 Step  : EXPORTED
 Transfer To - Store#:     2 Name: QA-STORE2                     Ship Via : UPS
                                                                 Ship Date: 08/03/05
 Lines:         1                 Info1:                         Proc Date: 08/03/05
 Line1:         1                 Info2:
 Note : FOR CUSTOMER VACATION, NEEDS BY AUGUST 6
 Cust#:       1 Cu Name: HAPPY                      1st: GEORGE          Init: M

   ISBN/SKU        │QtySh│QtyRq│  List │  Cost │      Title       │  Author  │Pr
 0671250671        │    1│     │ 10.00 │  5.00 │ROAD LESS TRAVELED│PECK,M    │ 2



 COMMAND: ■   MESSAGE:│Transfer items removed from inventory│   MODE: COMMAND
```

At the **remote** location, you can use the Transfer In that was created to put the item(s) onhand.

Creating a Transfer Request

If you want to request items be sent from a **remote** location, create a T**ransfer Request**. As with a Transfer Out, you'll select the store to export the request to and enter all the SKUs and quantities to request.

```
SKU:        0810964899    Title: NABIS                              Pr: 1
Author: NABI,S                   Price1: 150.00 Price2:      Sections:   1/   1
Vend#:       1 <1           >  NT:# AltVend:           OH:      1 OO:     4
PO1:PO   50095PubDate:      Comments: Old SKU 0810936542     Imprint:
============== PROGRAM TO MAINTAIN TRANSFER REQUEST ==============
Transfer Req#:        28 Date: 08/03/05 Reason: SPECORD     Status: CREATING
Transfer In# :           Date:                              Step   : NONE
Transfer From - Store#:    2 Name: QA-STORE2                Ship Via : FEDEX
                                                            Ship Date:
Lines:          2              Info1:                        Proc Date: 08/03/05
Line1:          1              Info2:
Note :
Cust#:        1 Cu Name: HAPPY                      1st: GEORGE      Init: M
============================ Merge Quantities =======================
  ISBN/SKU         | Qty |  List |  Cost |     Title        |  Author   |Sec|Pr
0671250671         |   3 | 10.00 |  5.00|ROAD LESS TRAVELED |PECK,M     |999| 2
0810964899         |   1 |150.00 |      |NABIS              |NABI,S     |  1| 1




COMMAND: ▮  MESSAGE:                                      MODE: COMMAND
```

Export the Transfer to the remote location. A Transfer Out is created at the remote location. Your store's Transfer Req# is included in the transfer out.

When the remote location is ready to ship the items to your store, they will export to yours. This will create a **Transfer In** on your system. The remote location will remove items from inventory. The Transfer In# will be added to the Transfer Request in the Transfer In# field.

The Transfer in will have all three Transfer #s: **Transfer Req#**, **Transfer Out#**, and **Transfer In#**. The Step will be **IMPORTED**, as shown below:

```
SKU:              Title:                                          Pr:
Author:                  Price1:        Price2:       Sections:   /
Vend#:         <          >  NT:  AltVend:          OH:       OO:
PO1:       PubDate:      Comments:                    Imprint:
============== PROGRAM TO MAINTAIN TRANSFER IN ==============
Transfer In# :        63 Date: 08/02/05 Reason: SPECORD     Status: CREATING
Transfer Req#:        28 Date: 08/03/05                     Step   : IMPORTED
Transfer Out#:        34 Date: 08/03/05              Shipped Via:
Transfer From - Store#:    2 Name : QA-STORE2               ProcDate:
Lines:          2              Info1:
Line1:          1              Info2:
Note :
Cust#:        Cu Name:                              1st:            Init:
============================ Merge Quantities =======================
  ISBN/SKU         | Qty |  List |  Cost |     Title        |  Author   |Sec|Pr
0671250671         |   3 | 10.00 |  5.00|ROAD LESS TRAVELED |PECK,M     |999| 2
0810964899         |   1 |150.00 |      |NABIS              |NABI,S     |  1| 1




COMMAND: ▮  MESSAGE:                                      MODE: COMMAND
```

Once the items have arrived at your store, type **<onh>** and press **<Enter>**.

```
SKU:                    Title:                                    Pr:
Author:                          Price1:        Price2:      Sections:     /
Vend#:            <             >  NT:  AltVend:        OH:         OO:
PO1:        PubDate:         Comments:                        Imprint:
============== PROGRAM TO MAINTAIN TRANSFER IN ===============
Transfer In# :        63 Date: 08/02/05 Reason: SPECORD      Status: CREATING
Transfer Req#:        28 Date: 08/03/05                      Step  : IMPORTED
Transfer Out#:        34 Date: 08/03/05              Shipped Via:
Transfer From - Store#:    2  Name : QA-STORE2              ProcDate:
Lines:          2              Info1:
Line1:
Note :     ┌──────────────────────────────────────────────────────┐
Cust#:     │ Do you wish to add transferred qtys to inventory? Y  │
           └──────────────────────────────────────────────────────┘ Init:
============================ Merge Quantities =========================
   ISBN/SKU       | Qty |  List |  Cost |       Title      |  Author  |Sec|Pr
0671250671        |   3 | 10.00 |  5.00|ROAD LESS TRAVELED |PECK,M    |999| 2
0810964899        |   1 |150.00 |       |NABIS             |NABI,S    |  1| 1




COMMAND: ONH MESSAGE:                                    MODE: COMMAND
```

Answer **<Y>** and the transfer items will be put on hand. The transfer's Status will be updated to **PROCESSED** and there will be a message "Transfer items added to inventory":

```
SKU:                    Title:                                    Pr:
Author:                          Price1:        Price2:      Sections:     /
Vend#:            <             >  NT:  AltVend:        OH:         OO:
PO1:        PubDate:         Comments:                        Imprint:
============== PROGRAM TO MAINTAIN TRANSFER IN ===============
Transfer In# :        63 Date: 08/02/05 Reason: SPECORD      Status: PROCESSED
Transfer Req#:        28 Date: 08/03/05                      Step  : IMPORTED
Transfer Out#:        34 Date: 08/03/05              Shipped Via:
Transfer From - Store#:    2  Name : QA-STORE2              ProcDate: 08/02/05
Lines:          2              Info1:
Line1:          1              Info2:
Note :
Cust#:         Cu Name:                          1st:            Init:
============================ Merge Quantities =========================
   ISBN/SKU       | Qty |  List |  Cost |       Title      |  Author  |Sec|Pr
0671250671        |   3 | 10.00 |  5.00|ROAD LESS TRAVELED |PECK,M    |999| 2
0810964899        |   1 |150.00 |       |NABIS             |NABI,S    |  1| 1




COMMAND: ■   MESSAGE: Transfer items added to inventory      MODE: COMMAND
```

Maintain Store File

To load this program, start from the **Main Menu**, select **Transfers**, then select **Maintain Store File**.

Type <**new**> and press <**Enter**>. Type in the Store# you want to assign and a store Name.

- For exporting, enter a **MDM** [modem number] to dial if using dial-up, or an **IP** address if using TCP/IP.

- You may enter *both* if both methods are available.

- Be sure to select the appropriate method in the **Data Transfer** field:

```
Store#:  456 SAN:

Name : STORE 456
Addr1: OTHER SIDE OF TOWN
Addr2:
City : WATERTOWN                      State: MA
PType: ZIP          PCode: 02472
Regn :                                Country:
Ph 1 :                                MDM : 781        643-3177
Ph 2 :                                FAX :
Ship Via :
EMail :
IP      : 198.1.1.100
LAN Node# :     ┌─ Xfer Methods ─┐   Dialing Prefix:
Data Transfer : │NONE             │   Dialing Suffix:
Tax ID State :  │MODEM            │   Tax ID Federal:
Con1 :          │LAN              │   PH :
Con2 :          │TCP/IP           │   PH :
Con3 :          └─ SHIFT-F11/F12 ─┘   PH :
Comments1 : CREATED BY STORESCR
Comments2 :

Command: MOD Message:                                    MODIFY
```

Press <F10> to save and exit.

- If your phone system requires you to enter a Dialing Prefix – such as "1" – or a Dialing Suffix – such as an employee number – to connect to a remote location, be sure to enter it in the **Dialing Prefix** or **Dialing Suffix** field.