

## Book Sales and Distribution **BSD**



### **Integrated order processing makes full use of the master database.**

Orders are quickly processed online with a minimum of data entry. You need only enter the customer name, the ordered product, and the quantity. All other information (price, discounts, payment terms, and shipping method and more) is extracted from the master data. Order terms can also be defined as defaults.

Customer info gives you the overview. Master data, account information, complete order and invoice history, combined with pending order and subscription information, everything displayed while having your customer on the phone.

### **Recording orders**

Single orders for books, electronic media or other products, standing orders, and subscriptions to loose-leaf editions can be recorded, as can other types of continuous orders. Invoices can be generated automatically whenever you choose. You have complete control over the first release date, which can be explicitly defined. Information on the product ordered can be verified, ensuring correct invoicing. No matter how the order is received, whether it be via a central facility, EDI, rep order or the web, all order lines are processed all together in the same way.

The invoicing method is specified in the master data. Orders can be invoiced individually or in aggregation applying optimization rules for discount and shipping costs, regardless of their origin. You can collect orders from central facilities - including using EDI, web sites or other online services, and combine these with reshipments and pending orders for the same customer. As an option directly after recording an order you may also start an online invoicing process which includes the online authorization of a credit card transaction.

### **Optimizing shipping costs**

The combination of different consolidation models allows you to combine shipments to meet the individual needs of your customer, optimizing shipping costs while responding to customer instructions. To ensure that the customer is given complete information, packaging and delivery notes, separate periodic invoices, marketing information, and special customer notices are generated during invoicing. All of these are available online and can be viewed at any time. Your filing tray becomes redundant.

### **Controlling production**

Stock accounting allows you to keep detailed records on your stock and sales movements. Using end-of-month reports, you can calculate their current value based on various depreciation models. Minimum stock warnings and reports provide you with information to regulate reprints. Stock management controls internal stock movements, set up of shipping units, and returns.

## Book Sales and Distribution **BSD**



### **Feedback on customer satisfaction levels**

Integrated CRM functionality helps you deal with queries and issues as they arise and provides a complete information resource for effective customer communication. All contact is logged allowing a proper and detailed assessment of the situation.

### **Judging your success**

The marketing components in the Klopotek Publishing Solution allow precise targeted marketing based on your customer and prospect data. Orders received from specific marketing initiatives are analyzed to ensure campaign success can be monitored and maximized.

Comprehensive reporting features provide you with summaries either online or in print format; a powerful tool for controlling your activities and presenting the latest management information. Information from the integrated reporting, customer, and/or title information systems can also be processed using various file formats, such as Excel. Thus, reports can be adapted to your precise needs. To save time with routine evaluations, default settings can be created for individual reports and queries.

### **Customer Pool**

Integrated in Business Partner Management. Proprietor and company group specific terms. Basic terms per medium. Payment terms and payment methods (automatic debiting, credit card payment, clearing houses, pro forma). Special discounts per customer on products, product discount groups and order types. Standard delivery and invoice addresses. Standard shipping methods depending on weight. Shipping and Invoicing schedule. Consolidation according to value or weight. Text information for order processing. Representative and wholesaler assignment. Automatic assignment of customers and account numbers. General interface to financial accounting department. Customer hierarchies. Branch office structures. Defaults for all terms for freely definable customer groups. Special - temporary - prices and discounts.

### **Product Management**

Versions, editions and reprints. Prices in different price types and currencies based on editions or periods. Price groups and sliding prices. Specifications for fixed prices and book rate ability. Distribution comments. General interface to financial accounting department. Inserts (free or charged). Automatic EAN code generation. The ability to restrict the distribution rights of a publisher. Determining the distribution area through the specification of countries or country groups; selling distribution rights. Remaining stock shipment display. Restricting the shipment of inserts by customers.

### **Series Management**

Creation of complex series structures. Definition of series and handling models (loose-leaf, reference works, period). Bibliographic series management. Compilation of sets; set version management. Building up of product hierarchies. Single products can be compiled in any structure (incl. multiple) and to any hierarchy depth.

## Prices

Period of validity for the assignment of a product to a price group. Unique price list assignment for prices.

## VAT / Sales Tax Handling

Sales tax apportionment for different media products; two sales tax figures together with the sales tax rate of the respective medium are used for calculating.

## Purchase Orders

New component for titles bought in from suppliers. Generation of purchase orders in response to automatic orders. Manual recording of purchase orders without direct delivery. Sending orders to suppliers. Open orders shown in the search results and can be printed out.

## Order Processing

Order creation supported by central data pool. Presetting of all relevant order data. Direct orders and representative orders. Control by order type. Variable shipping and invoicing dates. Different invoice and shipping addresses per order. All terms can be defined per order. Automatic recording and reservation of pending orders and backorders. Import of electronic orders. Minimum order amounts and values, under minimum amount surcharge. Checking of order duplicates and standing orders. Invoices, pro formas, and credit notes displayed and edited online. Statements for sales without goods delivery (e.g. seminars or services). Controlling first release including selection for pending orders. Generating of orders from marketing activities. Letter interface. Individualized accompanying letters with shipment. Set variations for all combinations calculable from individual parts. Sets can be evaluated from the statistics entirely or in part. Discount calculation from the set, entirely or in part. Prepackaging of sets possible. Order search by delivery address. Last digit of archive number as control number. Indicating the current position in order info. Reservation of stock. The possibility of online order

## Order Processing (cont.)

invoicing for immediate determination of prices and discounts; online authorization of credit card transactions. Establishing the availability of a product in the warehouse for each new order line. Marketing activity reference specified per order line; special discount for all order lines with the same reference; automatic recognition and allocation of matching marketing activities. Specifying and checking issue numbers and security codes for customers and orders, if credit card is the selected method of payment. Encrypted display of credit card numbers. Information is passed on to financial accounting.

## EDI

Order cycle for processing electronic orders.

## Standing Orders

Standing orders of series and loose-leaf editions. Automatic creation from single orders. Automatic deletion of standing orders with deletion of initial order, and amount reduction or cancellation in the event of return. Customer switch. Series independent, general standing orders (e.g. for publisher, division, subject group). Manage future changes in complete versions, version history. Documentation of all delivered products. Creating pro formas for standing orders. De duplication to avoid multiple shipments.

## Invoicing

Variable bundling of orders for one customer. Different price types, prices dependent on period and edition, price groups, sliding prices. Price determination at invoice point or by order receipt. Set and optimize discount. Discount dependent on amount, price, or order value. Payment terms, grace period, and various payment methods. Sales tax according to EU guidelines, including prospective EU members. Vouchers in net or non-net. Taking account of holds on position, order, customer, and products. Online invoicing, online authorization of credit card transactions. Automatic customer noti-

## Invoicing (cont.)

cation. Batch process messages. Cancellation of backorders and pending orders. Automatic shipping of inserts. Shipment consolidation according to value or weight. Exclusion of small shipments. General interface to financial accounting department. Interface to external stock management. Parallel invoicing (to online) for customer related rush shipments. Creation of accompanying letter. Discounts for marketing activities. Deactivated price optimization: quantity discount for all products in an order with the same price specification is no longer determined by adding up all individual quantities.

## First Release

Release frontlist per edition. Check parameters. Generating of positions in standing orders. Control compilation of products. Preset terms. Parameters for document stacks. First release according to the standard shipment model. Additional information for opening the first release.

## Document Creation

Creation of stacks for further logistical processing. Definition of sort procedures. Transference of data to external postage system. Selective creation of single document stacks.

## Accessing Documents

Direct link to original order. Electronic Delivery Note: Interface for electronic transfer of delivery notes and notifications to customers. Usage of standard delivery note formats. Export of all documents created by invoicing, insofar as they have not yet been sent electronically (invoices and delivery notes) for customers with corresponding entries in the customer pool.

## Pending Orders

Displaying of accumulated pending orders and backorders online. Separation of pending orders according to products and customers, including standing orders.

## Credit Notes

Creation of credit notes with invoice reference. Assignment of returns to invoices. Import of terms from invoices. Creation without assignment possible. Terms determined analogously to invoicing. Automatic cancellation of standing orders. Automatic creation of credit notes for returns. Commencement of subsequent transactions by reverse posting. Support of complaint management.

## Representative Commission

Representative pool. Editing of commission terms per representative. Creation of suggestion list for representative commissions.

## Stock Accounting and Management

Flexible warehouse structure consisting of warehouse, location, and active section. Picking area and backup area. Mention of warehouse in orders with automatic records of stock movements. All stock types. Freely definable stock movement types. Documentation of all stock movements. Inventory support. Returns processing. Overview of stock per product and active bin. Incoming stock, transfers, and dispatches. Creation of supply orders. Prepackaging for sets. Transport of notes for each internal stock transfer. Stock movement statistics. Stock evaluation.

## Book Sales and Distribution **BSD**

### Warehouse Accounting and Warehouse Management

Separation of logical and physical stock, reservations independent of the existing active bin. Increasing or decreasing the actual reprint and print run. Specifying the capacity per picking compartment and quality. Direct picking from the warehouse backup area for large quantities. Special zones for dynamic picking bins with overflow pallets; option for restoring the remaining quantities. Tool for controlling the content of the shipping units. Regions of bins can be frozen or unfrozen. Stock on suspended bins is not available.

### Customer Information System

Compact info display of the most important customer pool data; shortcut access to customer editing. Display of sales and turnover: Sales and turnover per year and month for each company group, publisher and division, or differentiated per medium according to sales, credit notes and balance; credit notes quota. Displaying of invoice position: Marketing activity, document date, document number, amount, product number, short title, order type, price type, price, discount, net turnover; displaying of invoice document with double click; shortcut to product information display. Standing orders: Publisher, order type, order number, order date, order reference, series abbreviation, short title of the series, amount and free copies, shipping recipient, start of order, end of order, reason for termination; calling up of order processing with double click; shortcuts to cancellation and customer switch. Overview version of standing orders: Version date, amount, order type, order date, order reference, series abbreviation and short title of the series. Pending order posi-

### Customer Information System (cont.)

tions: Marketing activity, amount, free copies, order type, order number, ISBN/order number, short title, order date, order reference, shipping date, notification date, notification text. Call up order processing; shortcuts to cancellation, customer switch, product information. Account information: Account number/origin, document type, document number, document date, currency, unpaid positions (amount), due date, last entry, reminder level. Keyword entry for series identification. Coding reserved positions. Account information with reminder levels and entry dates from the documents.

### Title Information System

Compact information display of the most important title, specification and distribution data per edition. Stock categorized according to warehouse and stock type, further according to finishing and quality state. Sales figures classified per year according to normal and special sales; shows complementary shipments, returns, return quotas, and net sales. Turnover divided into normal and special sales per year; shows credit accounts and credit note quotas as well as net turnover. Display for entire version or single editions. Detailed display according to month or order type. Overview across pool data, sales and turnover trends.

### Statistics and Reporting

Evaluation for controlling, disposition, marketing and sales. Order receipt, sales and turnover statistics, and standing order statistics. Evaluations of customers, products and representatives. Hit lists. Stock evaluations. Flexible selection capacity. Current and archived display.

### Invoice Export Batch Procedure

A reference to the set has been added to the line for set sub-lines.

### Export Stock Evaluation Batch Procedure

Daily output of movement data on the basis of a cost per unit price set monthly. Adjustment postings and rounding-off differences are exported on a monthly basis with the stock evaluation.

### External Interfaces

Document printing export interface. Export interface for documents to archive (Easy-Archive, PDF, Postscript, PCL5). Financial accounting export interface (Customer's and address data, invoice data). Financial accounting import interface for debtors (addresses, invoices, reminder level, payments). Orders import interface. Import interface for returns. Customer pool import interface (for migration and current customer information). Printing (documents, enclosures, including document printing export interface). Import interface for electronic orders. Delivery management export interface. Stock import interface (migration). Import interface for stock records.

### Reorganization of data records

Batch procedure for deleting obsolete data from the database established. Advantages: shorter processing times (data saving, dialog searching, invoicing times), increased efficiency by displaying only the current data. Modular structure: reorganization of a part of the data records is possible. Output of deleted data as text files and the archiving of these; time related deletion of data up to an appointed date or for a period. Maintenance of statistics data. Reorganization of data records per proprietor.