

Journal Sales and Distribution **JSD**



This fully automated solution provides you with significant savings in time and effort.

The Journal Sales and Distribution solution (JSD) is based on comprehensive experience gleaned in scientific and academic publishing.

Subscriptions

Order taking for new subscriptions, with direct and instant access to the master data, greatly increases your productivity. The most efficient method is to enter a marketing campaign code which calls up all of the offered terms and automatically generates a new subscription on its own. Processing of pro formas and single orders, as well as online invoicing and online authorization of credit card transactions, are all fully integrated.

Daily business procedures are efficiently processed by the system. Price and discount calculations are taken care of and a complete transaction history is recorded for each subscription, with open text fields for further comments. The complete customer history is available and can be viewed alongside the main subscription information. Increases or decreases in the number of issues are recorded, as are additional charges or credit account differences, which are printed automatically in subsequent invoicing. You can evaluate subscriptions over several years and answer any customer questions without painstaking research.

Klopotek Customer Care Management's full marketing functionality is also integrated into JSD. For promotional activities and free copy shipping, address selection results are added directly to the order processing and delivery. When a customer calls for an old issue, you have the stock management information on your screen.

Options

There is a subscription evaluation option as well as a fully automated process for student prices, temporary delivery to a holiday address or interrupted delivery when the account becomes overdue for payment. Accrual and automatic renewal are core options to help you in your day-to-day work, leaving you free to spend more time on winning new business.

International compatibility

Designed for international use, JSD is equipped with various country-specific price, tax, and delivery cost tables. Whether your prices are determined per year, per volume, per issue or per period depends on your business model. Integrated price combinations let you automatically invoice, for example, a subscription of a printed version plus an Internet version.

Check Ups

As with all of the Klopotek Publishing Solution modules, several reporting packages are available for creating detailed analyses, online or in printed form.

Reporting

JSD also allows information from the standard reporting, customer, and title information systems to be processed using various file formats, e.g. Excel. Reports can be adapted to your precise needs.

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Order Processing

Subscriptions and single issue orders. Academic periodicals and general press. Direct and bookseller trading. Duplicate check before creation of new subscriptions. Different subscription periods possible simultaneously. Single unit orders with several positions. Invoicing special issues to subscriptions (additional volumes, bindings, etc). Re-shipment of past annual volumes to subscribers. Partial shipment for shortened first period. Quantity change during current period with automatic invoicing/re-shipment. Period change with automatic shipment/invoicing. Complimentary copies. Trial issue shipment. Trial subscriptions. Invoicing variations (complete, postage only, no postage, free). Automatic future modifications (e.g. student price for five years). Invoices, credit notes, pro formas and fixed quotation in the system. Automatic acceptance of paid pro formas. Prepaid orders. Order transaction history incl. modification of terms. Display of invoices and credit notes for the period. Automatic letter creation (welcome, cancellation - in the language of your choice). Invoice addresses, invoice shipment addresses, correspondence addresses. Lock concept for correct order processing. Discount hierarchy publication, customer, order. Special discounts for customers. Regular shipment on the basis of publication pool. Handling variations for ordering and renewal (limited, standing order, pro forma, fixed offer). Specification of shipping costs per order. Non-regular shipment per order. Re-shipment following complaint. Quantity change within the period. Period changes. Stopping and restarting shipment. Cancelling and reinstating the subscription. Invoicing on the basis of publication pool.

Order Processing (cont.)

Linked to BSD/JSD components (basic solution with journal subscription). Collective revision: Hold/lift hold on shipment for all orders from one customer, cancel/lift cancellation, customer switch, with or without credit note. Variable letter control. Automatic change of shipping method at change of address. Continuation of shipment after change of address. Cancelling shipment when new address not known. Changing of all subscriptions for a customer from pro forma to fixed invoice and vice versa. Supplements, additional volumes in publication pool. Post-invoicing of price changes or changes in price type. Full credit note to customer. Customer switch. Automatic renewal during batch for standing order subscriptions. Renewal on customer reordering online. Renewal to enable generation of pro formas.

Collective Order

Entering, modifying, charging and releasing collective orders. Online invoicing of collective orders. Online authorization of credit card transactions (approval number). Switch over from a JSD collective order to a new BSD order and vice versa.

Customer Pool

Customer with contact. Invoice address, correspondence, invoice shipment address, and delivery address collection. Customer hold. Invoice hold. Delivery hold. Bank information. Credit card payment. Classification. Invoice currency. Accounting terms. Handling terms. Flexible special discounts. Free document sorting. Order default (price type, invoicing period) for order processing. Company group/branch office structures.

Publication Pool

Basic publication data also for editors and advertising management. Title, version, year, volume, issue structure with supplementary issues. Combined Titles (packages). Regularly and irregularly appearing versions. Copy/ duplicate annuals. Discontinuation, integration, acquisition and sales; overview of stock. Title modification incl. history. Ordering terms: no statement - cancellation deadlines - single unit order - trial copies - shipping countries - end-consumer classification for delivery. Library discount. European Union (EU) sales tax. Monthly purchase prices. Surcharges (e.g. drop-shipment fee). Bibliographical information. Balancing of period-related orders (business year, calendar year). Linked subscription product, assignment of publications to products (series) from BSD.

Publication

Two different tax rates are represented. Grace copies for subscriptions not processed as standing orders.

Prices

Fixed periods and period prices as desired (1/2 yearly, 3 years, etc.). Automatic price determination, also for credit notes and additional charges. Price history and price changes with future validity. Specific and general annual, volume and issue prices. Prices dependent on delivery country. Price types for organizations. Combined prices for multiple publications, or simultaneous order of other publications. Prices in any currency, with and without sales tax. Extra discount for drop shipment depending on specific publication. Shipping method depending on specific publication, postage included or excluded. Shipping costs according to method (with and without costs) in any currency.

Promoter Pool and Processing

Promoter terms stored with business partner (promoter role). Credits account stored with promoter-debit: desired payments, credit: subscriptions gained. Payment of reward delivery. Assignment or deletion of promoters stored with order. Display of promoter's credits and payment date of reward credits stored with order. Filing price lists for suppliers. Determining the number of reward credits stored with publication.

Invoicing

Initial debits and additional charges. Difference credit note or full credit note. Reverse Posting. Sales tax for European Union (EU) with shipping route taken into account. General interface to accounting department. Document archival (PDF format). Various calculation bases: Period, year, volume, issue. Invoice origination date: immediate, collective invoices stored with customer, any time intervals. Access to invoices via year, customer, or country. Separate invoicing, sorting and display according to customer (invoice text in any language). Invoicing for paid pro forma. Advance payments taken into account. Pro forma. Online invoicing, online authorization of credit card transactions. Payment terms. Transfer forms. Gross/net invoices. Re-shipments with invoice/delivery note or label. Assignment of invoice text in any language for specific periods and customer groups (e.g. Visit us at the Book Fair!). Document printing to export interface. Document flow control options (invoices, attachments, transfer forms). Option to create custom-made forms.

Postage and Shipping Method Optimization

Weight-dependent shipment costs for shipments. Fixed shipment costs combined with weight-dependent shipment costs. Weight-dependent shipment costs for several subscriptions per publication via shipment simulation. Shipping unit set up. Weight dependent specification of shipping method optimization. Shipment optimization for delivering issues for several subscriptions per publication. Internal weight and country dependent shipping method and cost tables.

Price Optimization

Combined and student prices possible for one publication. Administration of training periods stored with business partner or subscription. Price prioritization stored with publication. Automatic price optimization between combination and student prices for new creation, period change, renewal, cancellation, as well as customer or

Price Optimization (cont.)

end-consumer switch. Price optimization dependent on customer code, exclusion possible for particular customer groups with direct delivery. Later invoicing of charged time periods possible. Efficient management of combined Internet and print subscription prices.

Delivery by Issue (Newsstand Delivery)

Issue-based invoicing, e.g. for wholesalers or organizations. Credit notes for returns. Invoicing by issue in subscription.

Promotional Shipment

Addition of addresses for promotional copies additional to subscribed copy shipment. Selection of the addresses using the marketing component for promotional shipment (e.g. import of external addresses). Structural duplicate check. Specification of target addresses using priority rules. Consolidation of all selected addresses within the selection results according to specific rules. Exclusion of current subscription delivery addresses to achieve precise sets of matches for the promotional print run before the addresses are mixed for shipment.

Evaluation Option

Automatic determination of gratis period and invoice date on creation of a new subscription with evaluation option. Efficient handling of promotional subscriptions. Cancellation period in months or by number of issues. Cost free portion as period in months or by number of issues. Cost free portion as part of the invoicing period (proportional price). Cost free portion before complete invoicing period. Statistical evaluation.

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Insert Processing

Separation of address output for the first release to enable shipment with and without inserts. Number of output addresses for which inserts are to be delivered can be defined using selection parameters. Selection parameters: role, target audience, states, zip code, several methods of charge. Addresses for promotional shipments may be taken into account for the control of address output.

Shipments

First release, re-shipments. Distribution labels. Newspaper mailing service as many shipping methods as required. Repeat printing. Repeated access. Statistical shipment information according to shipping method.

Bookstore Delivery Adjustments (Academic Presses)

Process automatically synchronizes subscriptions and addresses between a publisher and its customer for: New orders, cancellations of a subscription, new address creation, change of address for current business partner. Customer's delivery addresses as end-consumer. Import of end-consumer addresses.

Standardized Interface for Large Resellers

Electronic exchange of subscription renewals between large bookstores or agents and a publisher. Creation of ICEDIS standard text file containing customer-related JSD order data for export. Processing of automated customer renewal during import. Comprehensive uniformity tests before automated renewal. Optional import simulation with exclusive logging but without writing to the database.

Customer Information System

Condensed information display of a customer's most important data, sales, and turnover data. Short information from the customer pool (journals). Account information. Statistics: turnover during year, assessed and invoiced turnover per publication (previous year, current year and following year), monthly view of sales amounts.

Title Information System

Condensed information display of the most important data, sales, and turnover data per publication. Short information from publication pool. Price and shipping cost of a publication. Statistics: Sales and turnover of subscriptions during year, arranged according to price type, number of subscriptions and turnover of subscriptions (previous year, current year and following year), comparative monthly view (previous year and current year) of sales amounts.

Commission Settlements for Representative

Creation of representatives with special commissions, gratis periods, responsibilities (areas, target groups) and exclusions. Definition of the periods in which assignment changes should have an effect on commission calculations. Automatic representative assignment to a subscription on the basis of subscription responsibilities possible. Settlement of representative's commission. Direct and regular commission.

Statistics and Reporting

Sales and turnover statistics on statistical basis (selections with dialog). Subscription lists for customer's or internal use (also on data carriers). Customer statistics. Publication statistics. Country statistics. Price type statistics. Realized and unrealized turnover (year accrual with carry forward option). Subscription lists. Statistical reports. Manage selection queries. Free selection from publications, business partners, orders, terms. Customer or order list as result. Flexible output of selection results. Representative: Suggested commissions. Commission list: Regional director. Check lists.

External Interfaces

Joint Serial Committee (ICEDIS) export and import interface. Delivery company export interface. Document printing export interface (documents, enclosures). Documents to archive export interface (Easy-Archive, PDF, Postscript, PCL5). Financial accounting export interface (customers and addresses, invoice data). Financial accounting import interface (debtors/addresses, invoices, reminder status, payments). Subscriptions import interface (migration only). Customer pool import interface (for migration and current customer information). Printing (documents, enclosures, including voucher printing export interface).

Warehouse Management

Connection of the Journals Sales and Distribution system (JSD) to the BSD warehouse. Integrated warehouse for products and publications. Publication pool is company group dependent and the parameters can be set with or without warehouse.

Journal Information system (JIS):

Information on publication, on prices and shipping costs as well as sales and turn-over.