

# Preparing Your Store for WordStock: **inventory preparation**

## Setting Installation Dates

Once we receive signed contracts from you, our Installation staff will contact you to arrange installing your system.

If you're going to have your inventory counted by an inventory service, such as RGIS or Western, you'll need to set a date for the count, but please finalize your installation dates with WordStock before setting a date for the inventory to be counted.

Try to give yourself 2-4 weeks between the installation/training dates and putting your inventory on the system. This will give you time to familiarize yourself with WordStock's programs and hardware before real information is loaded into the computer. (This loading of the inventory is often referred to as "going on-line".)

Once your inventory is in the system and on-line, everything you do with WordStock really counts and will effect the accuracy of the information. Until then, you can learn more about WordStock by practicing the exercises in the WordStock *User Manual*.

## WordStock

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## Things to Do Before Installation & Training

WordStock's *User Manual* is an online document available at:

<http://www.wordstock.com/wsmanual/>

Each online chapter can be printed easily, so we recommend printing relevant chapters for staff members who have specialized jobs, such as receiving.

Start with the first three chapters:

- *Computer Basics*;
- *Menus & Screens*; and
- *Organizing Your Store*.

In addition to general help, such as how to turn on the computer, these chapters also offer help with scheduling routine computer tasks, such as closing the store. They also outline exercises you should practice before the system is installed and goes on-line.

Once you're ready to learn more, *Getting Started* will bring you as far as the main WordStock menu. When you have the menu on the screen, you can follow the tutorials for any of the programs. This is a good time to practice data entry:

- Make an *Inventory* record;
- Make a *Product* record;
- Make a *Section* record;
- Make a *Publisher* record.
- Enter a *question mark* at any command prompt to see a **help** screen;
- If you're having trouble, take notes and save questions for your training session.

## Defining Products and Sections

You'll need to define *Products* and *Sections* because WordStock tracks each item in inventory under one **Product** category (equivalent to *Department*), such as *trade paperbacks* or *posters*, and at least one **Section** category (*Classification*), such as *History* or *Impressionism*. It's not essential to define these codes before the system is installed, because our Installer can help you with it, but doing so will maximize the time available for training.

A WordStock *Product* is tracked under both a *Product code* and a *Product name*. A *Product code* is a number between **1** and **99**. A *Product name* is a description of the merchandise, such as *Compact Disks* or *Hardcover Books* or *T-Shirts*. The *Product name* can be up to **30** alphanumeric characters, so you should be able to give everything a name that is a meaningful description of the merchandise.

Like *Products*, *Sections* have a numeric code and a name. There are up to **999** *Sections* available, so *Sections* can be used to subdivide merchandise across *Product* lines. For example, if you have a section called *Gardening*, all products that relate to gardening, whether books, calendars, or posters, can be tracked under the *Gardening* section.

If you define *Sections* carefully, you'll be able to produce very specific and useful reports. For example, you'll be able to determine how *Gardening* calendars sell compared to *Art* calendars. Therefore, think carefully about how finely-tuned you want your *Sections* to be, based on the range of merchandise you carry.

It's better to define more *Sections* than you think you'll ultimately need, because it's easier to merge them later than it is to subdivide existing *Sections*.

Some buyers use a numbering system or pattern to make it easier to assign items to specific *Sections*. For example, a store with a large selection of titles and merchandise relating to travel might use a scheme like this:

200 General Travel  
210 USA and Canada  
220 Mexico and Central America  
230 South America  
240 Europe  
250 Africa  
260 Asia

This way, as soon as you see anything from a section numbered 200 and 300, you'll know instantly that it's related to travel.

By leaving room between *Sections*, you'll have the flexibility to add subdivisions later. For example, books on the individual countries of Europe could be divided further as:

240 Europe  
    241 United Kingdom  
    242 France  
    243 Germany  
    244 Italy  
250 Africa

## Making Vendor Records

In addition to *Product* and *Section* files, you need to have a file of publishers, or vendors. Your system will be shipped with a *Publisher File* that contains records for approximately 1300 publishers. You may want to add local or specialized publishers.

In addition to entering your own account numbers and address information for your local sales rep, you may need to edit addresses for orders and returns. You don't have to delete any sales history shown, as it will be removed automatically when your real database is installed.

## Making Inventory Records

Once you've established *Product* and *Section* codes, you can begin to create records. To create *Product* records, go to *Maintain the Product File* under the *Working With Data Files* menu. Similarly, go to *Maintain the Section File* to create *Section* records.

If the sample database that's shipped with your system has *Product* or *Section* records that you'd like to keep for your own inventory, just leave them. You don't need to delete any sales history that might be shown, because the data in each record will be erased and calculated when your inventory is loaded into the system. However, please be sure to check that the *number*, *name*, *tax status*, *discount*, and *markup* fields are accurate, and to update them if necessary.

Some buyers prefer to use *Section* codes as **location** codes, rather than as subject identifiers. For example, the *Section* numbers might be used to identify particular fixtures in the store. In this case, it's easiest to start the numbering to the left of the main entrance and move sequentially around the store, clockwise.

- If you use this method, try to leave room between assigned numbers so you can accommodate future changes in your store's layout easily.

## Installation & Training

When the WordStock Installer arrives to install your system and to train you and your staff, s/he will discuss with you which staff members need to know which programs and tasks and draw up a training schedule.

Think about this in advance and try to have the right staff members available for the training period. Try to minimize interruptions by having other staff members cover the floor and phones. Since training is limited, free up as much of your own time as possible, too!

The WordStock Installer will need to know where cables have been run, where you want each piece of equipment, and your modem line number.

Between the time you're trained and the time your actual inventory is installed on the computer system, you can use the new cash registers. You won't be able to track the sales of individual items (because the real database won't be installed yet), but you can still sell items by *Product* codes. (In other words, you'll know how many units and dollars of *paperbacks* were sold, but not which individual items.)

If you haven't done so, this is the time to make *Product* and *Section* codes, as well as supplemental vendor info, such as your rep's address. It's also a good time to develop opening/closing procedures, daily/weekly schedules, and schedules for ordering/returns. Three things you should plan to do every day are:

- Print individual & summary cash sheets;
- Clear the register logs;
- Back up the system.

## Inventory Count

Whether you count your inventory yourself, or hire a service to do it for you, you'll need to organize things in advance. Use returns and markdowns to eliminate dead titles, to save the expense of including non-selling titles in your database.

However, try not to make your inventory artificially low, or to reduce your selection of titles in order to minimize the cost of the inventory, because you'll eventually have to make records and purchase orders for the titles that weren't counted.

- If you have a representative selection of titles in-stock when the inventory is counted, you'll save time and money in the long run.

If you plan to hire an inventory company, such as Washington Inventory Service or RGIS, make sure you determine exactly what they expect from you, and what you can expect from them. They should give you a *written* description of their inventory process and how to prepare for it, as well as a *written* estimate of how long the inventory will take, what it will cost, and the kind of results you can expect.

## After the Inventory Count

If you use RGIS to count your inventory, they'll transmit the information to Ingram, who'll match it against their database. Ingram will send the completed information to WordStock, and we'll convert it to WordStock's format and send it to you on diskettes to be loaded into your system.

If you use Washington Inventory Service to count your inventory, they'll transmit the data directly to WordStock, where we'll match the data, create diskettes, and send them back to you.

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- It will take three to five business days from the time your inventory is counted until you receive your database.
- During that time, you'll need to write down the ISBN and quantity of every title you sell, receive, or return.
- Try to avoid having a weekend fall in the middle of this time, as it will cause additional delays.

# Preparing Your Store for WordStock: **site preparation**

## Operating Environment

- Try to locate all equipment, especially the computer, in areas where foot traffic and dust will be minimal.
- The computer should be on a sturdy desk or table, away from direct sunlight, radiators, heat vents, and open windows.
- The preferred room temperature is between 60° and 80° Fahrenheit. The ideal environment is 75° Fahrenheit, at a relative humidity of 50%.
- Avoid placing the computer near large electrical devices, such as an air conditioner or a refrigerator, because they create magnetic fields that can interfere with the computer's operation.
- Some theft-prevention devices can also interfere with operation at the point of sale. If you use such a device, please have the make, model, distances, and a vendor contact name available so that we may plan accordingly.
- Try not to move the computer needlessly, because this can damage the heads of the hard disk or cause a diskette alignment problem.
- If you're uncertain of where components should go, WordStock's Installer will help you to choose suitable locations.

## System Cabling

All workstations require the use of 8-wire CAT-5 cable terminated to RJ45 female wall plates, using IEEE standard 568B for termination.

We strongly recommend that use a communications contractor with specific experience in cabling buildings for computer systems, rather than an electrician.

## Telephone Lines

For Support purposes, it's essential that WordStock is able to dial into your system through your modem line. It's also essential to keep line interference to a minimum when ordering electronically.

Therefore, you should install *a dedicated phone line* for your system, in order to assure clear modem communications for electronic ordering.

- Voice-to-data phone systems and phone systems with multiple extensions are not as good as dedicated lines, as they tend to cause interference.

**Reminder:** WordStock's *Electronic Credit Card Authorization/Funds Transfer* package *requires* its own dedicated phone line.

## Electrical Service

Quality electrical service is essential: the ideal electrical service is a dedicated **3-wire-to-cold-water-ground** circuit, with its own circuit breaker.

At the very least, the computer must be on its own circuit, and it must be verified that all outlets being used by any component go to a common ground. Don't assume that this is true because, if the grounding is not correct, voltage may appear on the ground line, or cause an electrical event known as a "ground loop", either of which can destroy the computer's circuitry.

- Have your electrician verify that all electrical outlets are connected correctly (the hot lead should be connected to the small hole in the outlet plug) and that the ground line is at zero voltage.
- Make sure that you have enough electrical outlets to support your entire system. If you can, plan ahead for possible future expansion of the system.
- Extension cords should not be used for any device, under any circumstances.

We suggest using a special color, such as red or orange, for the electrical outlets used for the computer system. Mark the outlets **Computer System Only** to avoid having anything that could cause problems, such as an air conditioner, being plugged into the computer system's circuit.

The system components can be damaged or destroyed by electrical line "surges", which can be caused by many things, including lightning.

To protect your system against surges, make sure that every device in the system is plugged into a **3-stage surge protector**. The original system will have the correct number of surge protectors, but you may need more if you expand the system.

Again: Never use extension cords.

*Static electricity* can cause problems with the computer's memory and other functions, and can cause printers to malfunction. If your office environment is prone to static discharge, consider using antistatic sprays and floor mats. We'll help you to locate these items, if you need them.

Cables should run parallel to the electrical service line to the target device, to minimize the possibility of an *electrical ground loop*. Try to keep cables at least one foot away from any possible source of electrical interference, such as air conditioners or refrigerators. If possible, submitting a floor plan of your store to WordStock in advance of installation can save time and reduce cabling errors.

If you need a cable run longer than 500 feet, e.g., if you have a POS that's very far from the main computer, we may need to add devices to amplify the signals. These devices are not typically included in the system selling price, so they could be an additional expense.

Please let your Installer know as soon as possible if you'll need to have a cable longer than 500 feet.

## Preventive Measures

- Designate the computer area as a non-drinking and non-eating area, to minimize the chances of accidents, such as spilling liquids on the keyboard.
- Keep the area around the computer clean and free of dust, which can cause problems with the drives.
- Try to control dust and debris, such as paper and ribbon residue, around printers, as they can interfere with proper functioning. Dust covers and small vacuums can be used to control this problem; vacuum the printer periodically.
- Clean the read-write heads on your diskette drive and tape backup unit once a week. Appropriate cleaning kits may be purchased from WordStock.
- Once you turn on devices, leave them on for the day: turning them on and off causes thermal expansion/contraction, which can damage their circuitry.
- Turn down the brightness of any screen that's not being used to minimize the chances of "etching" a stationary image onto the screen.
- Keep a written log of problems you have with your system; it'll help us to diagnose and solve problems, and to prevent them in the future.

## System Supplies

Like all computer systems, WordStock uses "consumable" items, such as paper and printer ribbons. You can buy these supplies from WordStock but, regardless of the source, buy quality supplies, especially diskettes and printer ribbons. You should stock up on basic system supplies:

- Printer ribbons, including receipt printers;
- Receipt paper;
- Report paper 132-column pinfeed;
- Receiving labels, if you're going to label.

You can order system supplies from WordStock online at:

[http://www.wordstock.com/supplies\\_order/](http://www.wordstock.com/supplies_order/)

or by sending email to

[sales@wordstock.com](mailto:sales@wordstock.com)

or by calling Sales at

800-753-9673, Ext. 212.

## Be Prepared for Emergencies

Inevitably, every computer system experiences hardware and/or software malfunctions. Your system's uninterruptible power supply [UPS] is a battery back-up that will protect the system against power failure or "black-outs". A voltage drop activates the UPS to draw electricity from its batteries to power the system.

The UPS is not intended as a substitute for electrical service, since it can only carry the system for about 10 minutes. What the UPS offers is time to shut down the system until power is restored.

The UPS will also protect your system against the voltage drops, or "brown-outs", that some areas experience. In most cases, you won't have to shut down the system. Any time you hear the UPS beeping, you know it's doing its job!

Of course, even if your electrical service is excellent, you'll still have other problems. It's important to prepare for them in advance by establishing emergency procedures for keeping your store functioning if your system goes down, or if you lose power.

## About Manufacturers' Warranties

Manufacturers' warranties require you to send the damaged device to the manufacturer for repair. Naturally, you won't be able to use the device until it's repaired and returned to you.

Therefore, while we'll pass on to you all applicable manufacturer's warranties, we want you to understand that they are of limited value to you, and aren't a substitute for an on-site hardware maintenance plan.

# WordStock Travel Policies for installation & training

## Working Hours & Fees

WordStock's standard hours for on-site installations, system upgrades, training, *etc.*, are:

- An 8-hour work day;
- Monday-Friday;
- Between 8:00 AM -8:00 PM, local time.

Our standard labor fee is \$60/hour, with a minimum of 4 hours, or \$480/day. Work outside the hours of 8:00 AM-8:00 PM is charged at \$60/hour, with a maximum work day of 12 hours.

- Travel to the site will begin no earlier than 8:00 AM (local time zone) and that travel time will be included in the first 8-hour day. If you request that the Installer fly in the day before, to ensure an early start, we'll charge an additional \$100, plus expenses;
- If a return flight to Boston cannot be made that gets the Installer back to Boston by 11:00 PM, EST, the return flight will be scheduled for the next morning; if that day is a Saturday, we will assess a \$100 surcharge;
- We'll accommodate requests for weekend or overnight work, schedule permitting, at a rate of \$125/hour, with an 8-hour minimum.

You will **not** be charged for costs or time incurred to remedy a problem caused by new hardware or new software.

However, you **will** be charged for time, costs, and materials that are incurred due to inadequate site preparation or for work or configuration not included in the original work order.

## Transportation

Round-trip tickets from Boston are usually flexible and not overly expensive if purchased in advance. We'll make every effort to minimize the Installer's travel costs. Note, however, that airline fees are often substantially higher if the ticket does not include a Saturday night stay.

Accommodations can sometimes be made to include an Saturday night stay, but this is at the sole discretion of the WordStock Installer. Although we would bill you for the Installer's accommodations for such a Saturday night stayover, we wouldn't bill you for labor charges unless services were provided.

If your store is within 200 miles of our offices, we'll consider the option of driving there. Typically, this involves renting a car—or a van, if hardware is being carried. If we're driving to your store, and it's possible to bring hardware with us, to save you shipping costs, we'll try to do that. (NB: to do this, we'll need a suitable area for your personnel to receive equipment.) Under some circumstances, the Installer may use her/his own vehicle, in which case we'd bill you at the rate of 40¢/mile.

Our Installer will consult with you to arrange local transportation; rental cars or taxis are preferred; the Installer will keep these expenses to a minimum. If you wish to offer local transportation, *e.g.*, if you or one of your staff will meet the Installer at the airport, please feel free to arrange this with the Installer, as long as it fits the work schedule.

## Accommodations, etc.

The Installer will consult with you to find suitable accommodations in your area and will also check with our travel agents for special offers in your locale.

We require accommodations to be safe and clean, and reserve the sole right to determine that they are.

We'll invoice you for Installers' food expenses, starting from when they leave Boston until their return. Please see the next page for a chart of estimated daily expenses for your area.

*Other incidental travel expenses may include:*

- Taxi fares to/from Boston airport;
- Tolls & parking fees;
- Penalty/cancellation fees incurred due to changes/ cancellation at your request, including airline penalty fees for flight changes made at your request.

On occasion, we may be able to reduce expenses by combining trips to two or more WordStock user sites. If this can be done, we'll happily do it, but we do not accept responsibility for schedule changes either party makes that eliminate potential savings.

WordStock is not liable for delays caused by late arrivals or missed connections due to problems with airlines or weather.

We'll make every reasonable effort to accommodate or to reschedule the install or upgrade.