ANTHOLOGY
Features and functionality

Anthology is a richly-featured, robust inventory control and POS system especially designed for booksellers. This document introduces some of Anthology's highlights and special or unique features. For a full description of Anthology see the Help system or the Manual; or for more information any aspect of Anthology, please contact Anthology Sales at (800) 819-0095 ex: 103 or sales@anthologysoftware.com.

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Two ways to run

Anthology offers two different ways to run:

Anthology Classic the original Anthology, for stores that prefer to own their software, data, and computer hardware, the classic LAN-based setup of Anthology with a one-time license purchase offers a proven, cost effective solution implemented in over a thousand bookstores in the US and around the world. Available as either a turnkey solution with Dell computers or on hardware you supply.

Anthology Private Cloud is revolutionizing the way businesses operate. With an Anthology Private Cloud™ server subscription, Anthology provides and maintains the server for you. An ongoing monthly subscription fee covers the server, its support and regular maintenance. Your program and data are securely hosted on an Anthology-supplied computer at your store, not in a data center somewhere on the internet. This provides the best up-time and performance. Anthology Private Cloud can runs on Windows 7 Professional or higher operating systems.

Both of the Anthology solutions—Classic and Private Cloud provide the same unmatched functionality of Anthology. Here follow some of its outstanding and unique features.

Interface / General

- **Familiar Windows** interface is easy for staff to master, with mouse-friendly drop-down menus, toolbar, shortcut menus, etc.
- Extensive use of **hotkeys** for menus and commands allow fast data entry
- Multiple windows (e.g., POs and Inventory) can be open at the same time
- Extensive **drill-down** capabilities: edit Inventory, Customer, or Vendor master file records from within almost any transaction; jump to parent transactions from InfoPanel and other displays
- **ISBN-13 ready**

Date
8/4/2007
8/4/2007
9/4/2007
12/5/2007
1/4/2008

- Support new 979 ISBNs, as well as both current 10-digit ISBNs and their13-digit (978) forms

ISBN / SKU	0393312445
Alt ISBN	9780393312447

- Optionally make ISBN-13 form primary or individual vendor

- **Inventory, Customer, Vendor, and Calendar assistants** are always available to help with data entry and to respond to customer inquiries
  - The **Assistant button** can be found next to every ISBN, customer, vendor, and date field to help you quickly and easily search for and enter data

...

  - **Inventory Assistant** lets you search by Keyword, Title, Author, Title, or Reverse ISBN (type 073 to get 0007133073—fast!)

    DEAD AND GONE — Search Inventory — Reset
    Search by: ○ Keywords ○ Author ○ ISBN / SKU ● Title / Description ○ Reverse ISBN / SKU — Fetch

  - Get on hand, on order, customer back order (i.e., special orders), on hold, and available quantities information instantly

Tim	OH	22
est Acco	OnHold	0
Available CBO		0
22	OO	0

  - Search for **customers** by code, name, or phone number

LYNCHL	Lynchburg	Laura		(888) 555-1212	545 S
MILTOD	Milton	Donna	Long Road High School	(888) 555-1212	105 H
NEVINT	Nevinson	Tom	Saginaw Harbor Yacht Club	(888) 555-1212	710 S
PATTEM	Patterson	Meg		(888) 555-1212	27 Co
RUSHTJ	Rushtorn	John		(888) 555-1212	21543

    Search by: ● Last Name ○ Code ○ Phone num   ☐ Phone search on last four digits

    See summary customer information; make edits or add new customers on the fly; go to full customer record with one keystroke

First Name	Sue	Phone #	(888) 555-1212	x		FBC balance		0.00
Last Name	Brown	Fax #		x		Disc Sched		
Organization		Email	subrown@webmail.net			Tax Profile	Resident	

  - **Calendar Assistant** makes entering date values easy and accurate

    May 2009

◄	May	2009	►

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

    Cancel — Today — OK

  - Clicking on any column head sorts that column. **Columns** can be resized and rearranged and preferences saved, either system-wide or by user

- **Fetch** and **SuperFetch** make for easy, accurate data entry

  - Automatically Fetch rich bibliographic information from within any screen simply by scanning or entering an ISBN; or **SuperFetch** by searching keyword, author, or title.

  - Use databases from **authoritative vendors** like R.R. Bowker Books-in-Print, and Anthology / Ingram Data service; or the free Simple Fetch service from Anthology.

  - With the new Anthology data service you receive the Ingram Content title information including cover art and annotations.
  - Web-based data sources provide widest coverage, most up-to-date data and most out-of-print titles.
  - Specify default values or lock down session values for Distributor, Department, Section, or Media and other fields

  - Optionally **categorize items** as used books or remainders, stock or non-stock items, etc before adding them to your Inventory
  - Access instant stocking information on Fetched titles from publishers and distributors via Internet StockCheck (see below)
  - Rich **"Learning"** functionality memorizes associations between vendor categories and your native subjects, departments, etc., reducing tedious editing and data entry
 - Send Fetched titles to a PO, to a special order, or just add them to your Inventory

- Instant, accurate stocking information is always available via **Internet StockCheck** including the discount and return status

    - Internet StockCheck is **available on the toolbar** from within any screen

    - Quickly and easily check availability of stock at **major distributors** like Ingram for any title at any time
    - Check stock at participating **Pubnet** publishers
    - Seamlessly access vendor stocking information via Internet StockCheck when Fetching
- Get instant, detailed vendor information regarding **on order and back order status** for titles from Pubnet publishers
- Detailed information on current item can be found in Anthology's exclusive **InfoPanel** displays
    - InfoPanels are available on Purchase Order, Receiving, and many other screens
    - InfoPanels have **tabbed display** to show summary inventory information, sales history, information on purchase orders
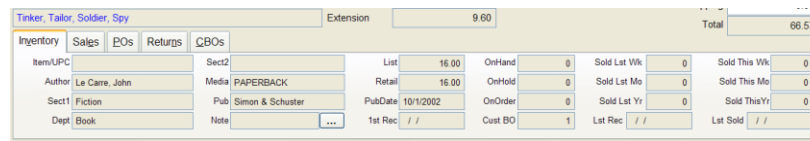
    (POs) and receiving, overstock returns, and customer back orders (CBOs), including special orders
    - Show or hide InfoPanels with hotkey; set default in Options

- **Highly customizable**
    - **Options screen** on the Tools menu gives control of literally dozens of options in every area of the program
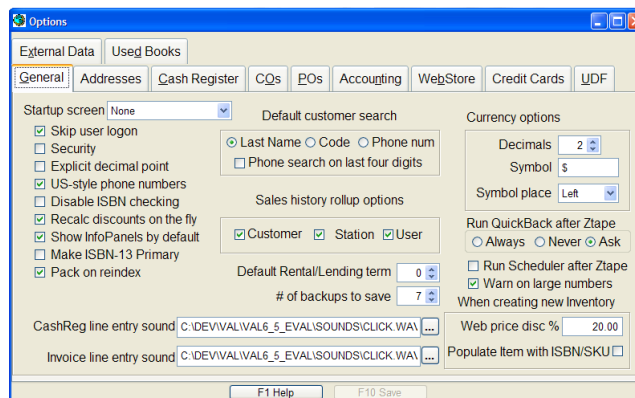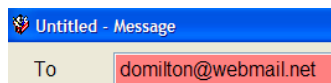
- A few customizable options:
  - Enable or disable ISBN checking to warn when 10 or 13-digit SKUs fail check digit test
  - Optionally either **recalculate** discounts on the fly or not for faster data entry in POs, receiving, and customer orders
  - Customize # of decimals, currency symbol and symbol place for display and printing for non-US currencies
  - Optionally specify **sounds** for line entry on Cash Register, POs, and other screens
  - Separate **addresses** for physical store, billing, and shipping
  - Customize **screen** layouts; each user can have their own layout restored on login
  - Optionally enable **"cash register" style entry of currency values**
  - Optionally format phone numbers to US style
  - And many, many more

- Print **bar code labels** as needed

Your Bookstore

Meteor-Gazette (daily) $1.00
NEWS

- **Email integration throughout**

Untitled - Message

To   domilton@webmail.net

  - The email icon on the toolbar lights up green when current customer or vendor has a **valid email address** on file. Simply click on the icon to compose an email message
  - Email messages can optionally use **customizable, user-defined templates**

Sales

Cash register

- **Sell books and non-book items**, gift cards and gift certificates on a single sale

Type	ISBN / SKU	Qty	Price	Tax	Disc...	Ext
Sale	0441017150 Dead and Gone	1	25.95	✓	0.000	25.95
Sale	LATTE_LG Large Latte	1	3.50	✓	0.000	3.50
Gfact	Inhouse Giftcard 123456789	1	20.00		0.000	20.00

- Optionally control dozens of functions through Security settings, including optional supervisor overrides

- **Highly customizable:**

  - Specify **message** to print on receipt

  - Break out individual taxes or not in multi-tax jurisdictions

  - Optionally warn when selling Inventory items with a price of 0.00

  - Optionally send **AR invoices** to report printer

  - Optionally require customer to have Terms on AR sales

  - Optionally warn on sale of last copy of a SKU

  - Optionally track **detailed customer sales history** or not

  - Begin new sale on customer, title, or ISBN field

  - Show or hide the following fields: Customer, Organization, Terms, Customer Note, FBC Total, FBC Balance, Discount

  - Optionally force **logging** of clerk on each sale; optionally require password

- Optionally **specify customer for any sale**; add new customers or edit existing customers on the fly

  - Customer organization, Terms, and optional Notes display on screen for easy reference

  - Also display **customer frequent buyer club totals and balance**

- Quickly find and display **complete customer sales history** with a single keystroke

- Specify a **discount schedule** for a sale as a whole; also optionally specify override discounts on any individual line

  - An unlimited number of discount schedules can be created and used

- Specify a **Tax Profile** for sale (Tax Profiles can include one or more taxes); default Profile is assigned to every sale

- Optionally display Author, Retail, OnHand and OnOrder qtys for current item

- Multiple, customizable **Frequent Buyer Clubs** (loyalty programs) can be configured to count, items, dollars,

or sales; and to give rewards in the form of either coupons or discounts.

- Frequent Buyer Club totals update dynamically during a cash register sale; total turns red when customer passes reward threshold

FBC total $	107.84

- Enter items by ISBN/SKU or by Title/Description

- Accept payments on account and other Pay Ins; make Pay Outs

- Sell and accept Anthology InHouse **gift cards**
    - Sell gift cards as a line item along with other items on a single sale
    - Issue gift cards in lieu of store credits **for returns, change on gift certificates**, etc.

- Support bar code scanners

- **Scan mode** makes line item entry fast and easy; no keyboard input required

- **Return Manager** ensures that books sold at a discount are not returned at full price, avoiding costly errors
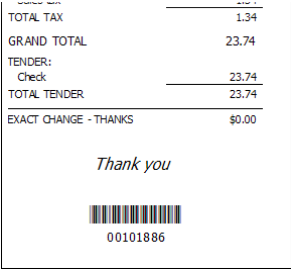
Type	ISBN / SKU	Qty	Price	Tax	Disc %	Ext
Retur...	1416594884	1	28.00	✓	20.000	-22.40
	Most Wanted Man					

- **Void sales**

- Optionally support multiple Units of Measure (UOM) for any item; sell individually or by the box, dozen, etc.

- Line items on the current sale all displayed on the "tape area" on the right of screen
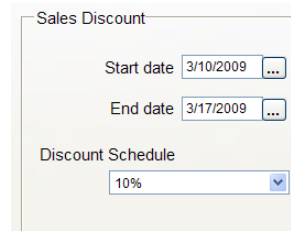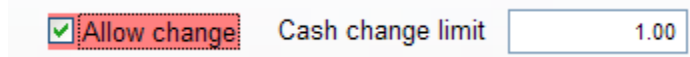
# of items
3

- Inventory Assistant makes lookup of Inventory items for data entry or for responding to customer enquiries fast and easy

- **Barcoded transaction numbers** are printed at the bottom of each receipt, facilitating fast, accurate returns

TOTAL TAX	1.34
GRAND TOTAL	23.74
TENDER:	
Check	23.74
TOTAL TENDER	23.74
EXACT CHANGE - THANKS	$0.00

Thank you

00101886

- Sales, returns, and special orders can all be included on a single transaction

- **Suspend and Resume** an unlimited number of sales

- Gift receipts

- Multiple receipts can be printed for any sale

- **Reprint receipts** from any day, even months or years ago

- **Notes** can be attached to any sale and optionally printed on receipt

- **Number of items** listed for easy cross check when bagging items**.**

- Unlimited number of tenders can be used on any sale
- List of tenders and their associated rules (allow change, maximum change amount, etc) are user-maintainable

- Change due automatically calculated and prominently displayed
- Schedule **sales events** by item, department or section

- **Optional touchscreen Cash Register** interface is easy to use in
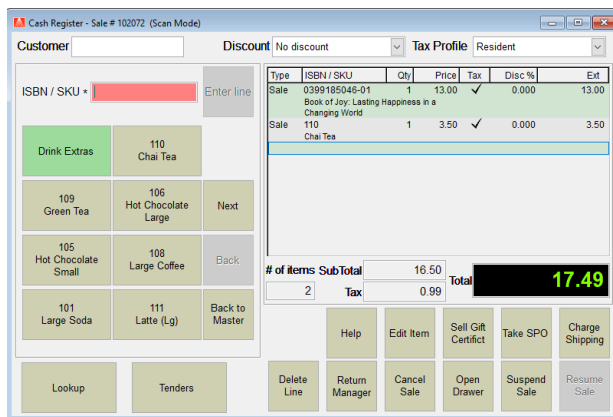
  cafes and newsstands; list of items and their order is user-specifiable New customer facing Tips capability as part of Café using Clearent credit card processing.

Special Orders

- **Quickly and easily** take special orders (SPO) through Cash Register screen
- Control number of receipts to print, default deposits for SPOs through Options screen
- Quickly and easily find bibliographic information for customer requests through **Fetch, SuperFetch**, and integration with databases of books in print
- Get up to date availability information through **Internet StockCheck** in real-time including on hand, on order, discount and return status

- Attach notes to SPOs

- When special order is picked up, any **deposit**, is automatically applied

- **Prepay option** allows customer to pre-pay SPOs, including tax for easy pickup

Tender	Deposit	8.00

- Optionally take deposits; deposits calculated using user-defined default percentage value

- Optionally **automatically add new SPOs to a PO**

- Include SPOs on POs when auto-generating POs

- Track SPOs through every step of purchase order/receiving process

- Check purchase order status, customer notification status and other information for one or all SPOs through **CBO (customer back order) Manager** or Review Special Orders screens; review both open and completed SPOs

Item Status	Source	Tran #	Date	CustCode	Customer	Phone	ISBN/SKU	Title/Descrip
Draft	SPO	000003	1/10/2009	JOHNSP	Johnston, Pamela	(888) 555-1212	0345449746	Fall from Grace
In	SPO	000004	1/10/2009	GROSSE	Gross, Elena	(888) 555-1212	1885173598	Deadly Kin
New	SPO	000005	4/6/2009	MILTOD	Milton, Donna	(888) 555-1212	0743457900	Tinker, Tailor, Soldier, Spy

- **Send items to a PO** from the CBO Manager (or any other screen) using Send to PO toolbar icon

- Flag SPOs at receiving; print notices to call or mail customers; or **notify via email**

- Print SPO wrappers at Receiving to make locating books easy behind the sales counter

- Handle pickup of SPOs through Cash Register screen; **SPO pickups** can be mixed with other line types (Sale, Return, etc) on a single transaction

Customer Orders

- Customer Orders screen handles **mail, email, fax, or web sales**

- Track **multiple shipments and back orders**

10

- Accommodates **complex discount schedules and tax profiles**
- Optionally show InfoPanel with detailed information about each line item
- Order header accommodates both shipping and billing addresses; notes; special messages to print on shipments and invoices; customer PO numbers; and much more
- Create **pro forma invoices (quotes)**

- Calculate total weight of shipment
- Optionally send line items to a PO

- Allow or forbid partial shipments
- Charge shipping
- Print customer labels
- Allow or forbid back orders (BOs)
- Set default behavior to give change or retain deposit

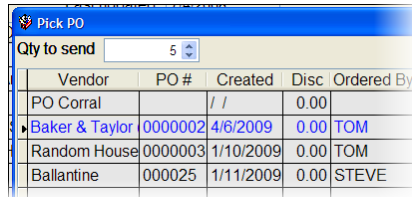- Specify which documents to print at posting

- Specify a default **email** for customer service contact
- Optionally pre-fill Ship and BO QTYs based on Inventory OH
- Optionally include QTYs on draft orders or not when calculating customer back order QTYs

Book Fairs

- Check out and check in items sent out of store for sale at **book fairs and other events**
- Calculate QTYs sold by counting copies returned; counting copies at remote site; or entering sold QTYs directly
- Scan Mode uses barcode scanner to rapidly count books returned
- Post multiple updates for a single open book fair

Type	ISBN / SKU	Title / Description	UOM	Send	Out
Sale	003064629	Biology : Visualizing Life	EA	5	5
Sale	003065036	United States : Change And Challenge	EA	5	5
Sale	006001221	Geography Club	EA	20	14

- Track QTYs sent and QTYs still out to the book fair
- Optionally integrate with **Offsite Sales module** to capture transaction details and eliminate data entry on return
- Send more copies to a book fair through Transfers Out function
- Clone archived book fairs to eliminate or minimize data entry
- Optionally send book fair list to a PO

- Send list of items received on a shipment in Receiving to a book fair

Qty to send	5

Vendor	PO #	Created	Disc	Ordered By
PO Corral		/ /	0.00	
Baker & Taylor	0000002	4/6/2009	0.00	TOM
Random House	0000003	1/10/2009	0.00	TOM
Ballantine	000025	1/11/2009	0.00	STEVE

- Optionally check QTYs to be checked out against Inventory On Hand
- Print professional invoices for book fairs
- Optionally guard against entering books not checked out on return
- Notes can be printed on invoices and other documents or associated with book fairs for internal use

Optional offsite sales module

- Take one or more **laptops** offsite to book fairs or other events
- Import offsite sales into main system on return for reporting and inventory update

Offsite Sales ▶
- Refresh offline data
- Prepare This Computer to Go Offline
- Update Main System with Offline Data
- Retrieve Offline Credit Card Transactions
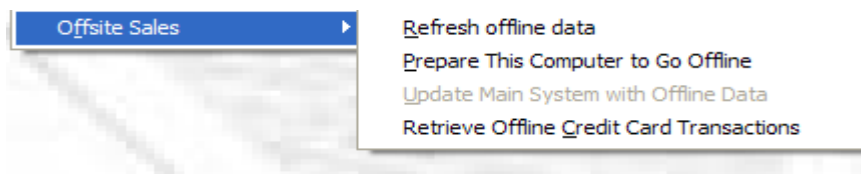
- Take **special and customer orders** offsite and fulfill them from main system

- In Anthology Private Cloud, simply add a logon to sell offsite. Or use the special offsite module for APC to assign special tax rules, etc.
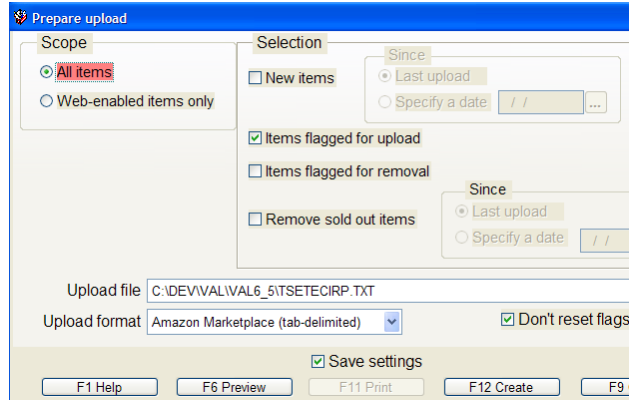
Web sales support

- Create uploads in a variety of standard formats for upload to **your own website or third-party sites**
- Integrate with Indie Commerce with both upload of inventory and download of orders.

X and Ztapes

- Run **Xtapes** during the day to close out shifts; **Ztape** at end of day to summarize and close day; **Historical Ztapes** for any day or range of days in the past

- Optionally print itemized tender recap

- Summarize **bankable and non-bankable tenders**; non-sale transactions; customer deposits; returns; discounts and markdowns; sales by department; sales by hour; and more

- Run for single user or all users; one station or all stations

- Send report to printer or export to Excel, pdf, other file formats

Bankable Tenders	
AMEX	$63.07
CASH	$5453.93
CHECK	$3557.52
DISCOVER	$20.78
INHOUSE	$17.97
MASTER CARD	$2643.36
VISA	$7129.74
Total bankable tenders	**$18886.37**
Non-Bankable Tenders	
Accounts receivable	$0.00
Gift certificates	$0.00
Store credits	($12.75)
FBC credits	$0.00
TRADE CREDIT	$0.00
INHOUSE	$17.97
Total non-bankable tenders	**$5.22**
Total tenders	**$18891.59**
Special Transactions	
Acct receivable - Sales on acct	$0.00
Acct receivable - Payment on acct	$0.00
Net change	$0.00

Credit cards

- Secure credit card authorization.
- Ease PCI compliance End to End Encryption (E2EE)
- Optionally save and re-use customer credit card information with Tokenization of securely stored credit card data on the processor's server.
- Support credit card swipe and EMV Chip Pin (depending upon configuration)
- Support **authorization via internet**

Inventory Control

Purchase Orders

- Create, print and electronically send POs
- Track draft, open, and completed POs
- Create POs manually or autogenerate
- **PO Corral** provides a holding area for customer and staff suggestions, books to order, etc
- Include Shipping Instructions on POs
- Print POs in either 10-digit or 13-digit ISBN format
- Customize special message to print on every PO
- Specify whether Back Orders are allowed or not for whole PO with optional line by line override

SubTotal: 5,398.77 Shipping: 0.0

☑ Draft ☐ History
☐ Open ☐ All
☐ Exported

000025

IMPORTANT - ABOVE NUMBER must appear on all correspondence, invoices, shipping papers and packages

Your Store Name Ship
The Manager/Owner
100 Anystreet

Anytown MI 12345-1234
Phone: (000) 555-1212 Fax: (000) 555-1212

- Specify discounts for PO as a whole, with optional line by line override
- POs can use vendor discount schedules as entered in Vendors file
- Electronically order with all major distributors such as **Ingram** and publishers (including **Random, Simon, Harper Collins and others**)

Electronic Ordering

Do Stock Check

Send Order

Get Confirmation

Cancel

- Electronically send StockCheck to supporting vendors
- View and print confirmation files receiving during electronic ordering
- Apply confirmation files from EO to POs to adjust for QTYs shipped, back orders, and cancellations

- **Cascade** cancelled items to a new PO so they can be ordered from another vendor

- Full support for **Pubnet** electronic ordering for smaller publishers.

- **Email POs** to vendors

- Customer back orders like special orders are flagged on PO; details available on the InfoPanel at bottom of screen Send any item to a PO at any time using **Send to PO toolbar button**

- **InfoPanel** displays show detailed information on each line item, including PubDate; 1st and Last Received Date; OnHand; OnOrder; Customer Back Orders outstanding; and Sold This Week and Last Week, This Month and Last Month; This Year and Last Year. Sales page show graphical sales chart by month or by week. POs, Returns, and CBOs (customer back order) tabs show details of status.
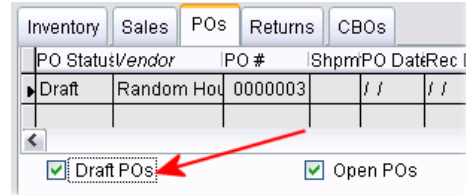
- InfoPanel can be toggled on and off with hotkey combination to show more line items or to zoon in on information about a particular item

- **Regroup** option takes cancelled items on a distributor PO and places them on POs for their publishers of record

- Reprint or view again last EO confirmation

- Find Line function for searching within a large PO

- **Merge** one PO into another

- **Move or copy** one or a group of line item(s) to another PO

- Send selected line item(s) to a Book Fair

- Globally change status (Not Yet Published, etc) for selected items

- Use Fetch and SuperFetch to search and enter new items from within a PO

- Import frontlist on floppy information into a PO
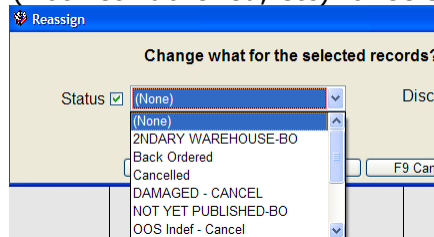
- **Edit inventory items** from within the PO screen

- SuperDelete option deletes item from Inventory
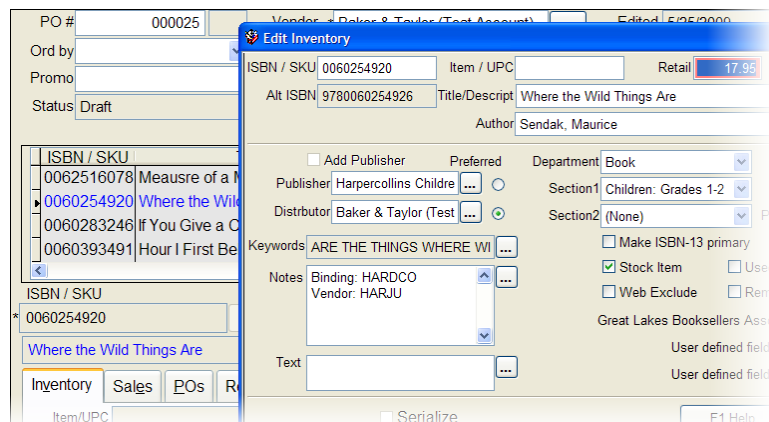
as well as removing it from the PO

- Quick and easily check on stock availability using Internet StockCheck

- Allow user-specified PO numbers or not

- Optionally force FlashBack format PO numbers

- Optionally allow **back orders** or not by default

Auto Generate Purchase Orders

- AutoGenerate POs function allows for **automated creation of POs**

- Compare On Hand QTYs with user-defined **Minimum and Maximum** stock level values; or use **detailed sales history**; or create POs containing customer back orders only

- QTYs to order can optionally be adjusted for QTY on hand, QTY already on order, QTY on draft POs, or **customer back orders**

- POs can be created for publisher of record of each item, last vendor, preferred vendor as specified in the Inventory file, or a single, specified vendor

- Evaluate all Sections or just one, all Departments or just one, all Media or just one, and all vendors or just one.

- Optionally include books from **all imprints** of a specified vendor

- Optionally exclude used books and non-stock items

Receiving

- Quickly and easily receive merchandise with or without a PO

- Search for POs by Vendor, PO #, or ISBN/SKU

- Scan mode makes counting received items fast and easy

- **Quick Receive** ("invoice-oriented receiving") allows for fast receiving without worrying about POs

- Receive All function moves Open QTYs into Received QTYs for fast receiving of small orders

- Assign Back Ordered, Cancelled and other statuses while receiving; statuses are visible on Inventory record and through Inventory Assistant

- **Price changes** received via electronic ordering confirmations automatically applied

- Edit Inventory master file record from within Receiving

- View EO confirmation

- Print SPO notices or email SPO customers

- Send **email** to vendors or customers using customizable templates

- Merge receiving memo with another receiving memo

- Send selected items to a PO

- Print labels

- Edit receiving history to reflect new invoice or discount information, etc.; recalculate cost of goods sold based on new information

| | | *Receiving Memo* | | | | | | | 0000010 |

Baker & Taylor (Test Account)
251 Mt. Olive Church Rd.

Commerce GA 30599 USA
Phone: (800) 775-1100 Fax: (800) 775-7480
ATTN:

IMPORTANT - ABOVE NUMBER must appear on all correspondence, invoices, shipping papers and packages

B I L L T O
Your Store Name Bill
The Manager/Owner
100 Anystreet
PO Box 1
Anytown MI 12345-1234
Phone: (000) 555-1212 Fax: (000) 555-1212

S H I P T O
Your Store Name Ship
The Manager/Owner
100 Anystreet

Anytown MI 12345-1234
Phone: (000) 555-1212 Fax: (000) 555-1212

DATE		ACCT #		SHIP VIA	TERMS		INVOICE #		INVOICE DATE	INVOICE AMT
5/24/2009		T514737			2% 10 NET 30					

CBO	QTY ORD	QTY OPEN	QTY RECD	STA TUS	UOM	ITEM #	DESCRIPTION	SECT1	LIST	NEW LIST	RETAIL	DISC. %	EXTEN SION
	4	4	4		EA	6306864504	Human Clay		28.98	!	28.98	40.000	$69.55
	4	4	4		EA	6306801995	With Arms Wide		11.98		11.98	40.000	$28.75
	4	4	4		EA	6306152784	1		18.98		18.98	40.000	$45.55
	4	4	4		EA	6306154213	Kryptonite		11.98		11.98	40.000	$28.75
	4	4	4		EA	6306810994	Breathe		24.98		24.98	40.000	$59.95

Ordered	**Received**		**Discount %**				**List**	387.60
20	20		0.000				**Discount**	155.05
							Sub Total	232.55
							Shipping	0.00
							TOTAL	232.55

- Filters to hide or show completed items or short-shipped items

- Optionally require entry of vendor invoice information before posting

Overstock Returns

- Create Return Invoices to return overstock merchandise to vendors

- Support vendor permission required or not

- Invoices tab on InfoPanel makes it easy to select and assign vendor invoice information to each line item; system suggests more recent invoice to minimize data entry

Reason		Invoice
DAM	Damaged
DC	Damaged Cas
DEF	Defective
DI	Damaged Item
MIS	Short shipped
NOR	Not ordered
OVR	Overstock

- Reasons for return include Overstock, Damaged, Not Ordered, and more

- Flag items for deletion from Inventory after return

- Auto-generate Return Invoices based on a range of criteria, including Not Sold Since, On Hand Stock exceeds X months of sales, etc

Generate Suggested Overstock Returns

- Powerful Generate Overstock Returns screen lets you create draft Overstock Return memos for one or all vendors according to standards you define

Transfers In and Transfers Out

- Transfers In and Transfers Out screens allow audit trail of merchandise entering or leaving your inventory through "non-standard" ways -- e.g., donations; or, with the Multi-store Version of Anthology, between stores or between a store and the central office

- Transfer merchandise to an open book fair

Physical Inventory

- Physical Inventory function allows comparison of a physical count of inventory with On Hand values as recorded in the Inventory file

- Update On Hand QTYs in Inventory with physical counts; produce exception reports

- Use optional scanners to simplify counting process or enter counts by hand

- Batches, either from scanners or manual entry, are tracked for audit purposes

Master Files

Inventory

- The Inventory screen provides you with comprehensive, tabbed display of critical information about your inventory

- The **List tab** provides an overview of all your inventory. As with all Anthology grids, its columns can be sorted and rearranged to suit your style

List	Details	UOMs / Prices	Sales	POs	Returns	CBOs	BFs	Copies	Inv Hist

ISBN / SKU	Title / Description	Author	OH	OO	List	Retail	Dept	Sect1	Me
0810993139	Diary of a Wimpy Kid	Kinney, Jeff	3	0	12.95	12.95	BOOK	CHIL7	HR
0810994739	Diary of a Wimpy Kid : Roc	Kinney, Jeff	2	0	12.95	12.95	BOOK	CHIL7	HR
081298062X	Shadow Country	Matthiessen, P	3	0	16.00	16.00	BOOK	FICT4	PA
0819568309	Black Mirror and Other Sto	Rottensteiner,	6	0	85.00	85.00	BOOK	SCIE2	HR
0819568317	Black Mirror and Other Sto	Rottensteiner,	6	0	27.95	27.95	BOOK	SCIE2	PA
0843961139	Killing Castro	Block, Lawrenc	6	0	6.99	6.99	BOOK	MYST	PA

- The **Details tab** provides a summary of important information about each inventory item:

  - Display full title (up to 100 characters) and author information; optionally add special keywords for searching

Title / Descrip *	Why Is This a Holiday : A Guide to American Celebrations of God and Country	
Keywords	: A AMERICAN AND CELEBRATIONS CC ...	Author Johnson, Kevin Orlin, Ph.

  - Define both primary and secondary sections

    Section1 Sociology
    Section2 History American

  - Show both **ISBN-10 and ISBN-13 forms** where applicable

    ISBN / SKU * 9780965366083
    Alt ISBN 0965366081

  - Optionally specify List, Retail, and Web prices

    | Retail price | 22.01 |
    | List price | 22.01 |
    | Web price | 17.60 |

  - Specify publisher and up to three distributors; optionally specify a **preferred choice for ordering**

	Vendors		Preferred
Publisher/Mfg	Bibliotech Inc	...	○
Distrbtr1	Baker & Taylor (Te	...	⊙
Distrbtr2		...	
Distrbtr3		...	

  - Three **user-definable fields**. You can freely define these fields in the Options screen; use them in sales history reporting and queries

    Great Lakes Booksellers Assoc
    GLBA Fall catalog
    User defined field 2

    User defined field 3

  - Specify headline and text (unlimited length) for **export to your**

    Web / Catalog
    Headline

    A Wonderful Celebration of American Celebrations

    Text

    This comprehensive ...

    ☐ Exclude from web

web site or catalog

- Display **quantities for On Hand and On Order**; On Hold (special orders waiting for pickup or books otherwise being held for customers); Available (On Hand less On Hold); customer back orders (including special orders and mail or web orders)

Available	5

- Optionally assign a variety of Stocking settings, including whether or not to reorder, whether discounts are allowed, etc.

Stocking		
Bin		☐ Returnable
		☑ Stock Item
⊙ Trade		☐ Label Print
○ Short		☐ No discount
Sales discount		
Weight		

- The **Sales tab** shows detailed sales history by month or week, with values for Retail, Cost, Margin, and Markup, in both spreadsheet and graph form

	Yr	M
Retail $	29.90	
Cost $	17.94	
Margin $	11.96	
Margin %	40.00	
Markup %	66.67	

- The **POs tab** shows full purchasing history, including orders and receiving history, invoice numbers and dates

List	Details	UOMs / Prices	Sales	POs	Returns	CBOs	BFs	Copies	Inv Hist

PO Status	Vendor	PO #	PO Date	Rec Date	Ord	TotRecd	Open	InvDate	Shpm
Complete	Bookazine	0000006	2/11/2008	/ /	2	2	0	/ /	
Shipment	Bookazine	0000006	2/11/2008	2/11/2008	2	0	2	12/8/2005	
Complete	Bookazine	0000007	2/12/2008	/ /	8	8	0	/ /	
Shipment	Bookazine	0000007	2/12/2008	2/12/2008	8	0	8	12/9/2005	
Complete	Baker & Ta	0000008	2/22/2008	/ /	10	10	0	/ /	

- The **Customer Back Orders** (CBO) tab shows a summary view of all the current customer back orders, including special orders, for the current item

List	Details	UOMs / Prices	Sales	POs	Returns	CBOs	BFs	Copies	Inv Hist

| Item Status	CustCode	Customer	Phone	Source	Tran #	OrigOrd	BO	Sent/Sold	PO #
New	BROWNS	Brown, Sue	(888) 555-1212	SPO	000008	1	1	0	
Draft	MILTOD	Shady Hill School,	(888) 555-1212	SPO	000005	1	1	0	0000002

- The **Inventory History** (Inv Hist) tab shows all complete history for any item, filterable and sortable by data, transaction type, etc.

List	Details	UOMs / Prices	Sales	POs	Returns	CBOs	BFs	Copies	Inv Hist

Type	Date	Transno	Qty	UOM	Price	Disc%	Name	Code
CR	8/4/2007	101808	8	EA	15.95	0.000		
CR	8/4/2007	101810	1	EA	15.95	0.000		
CR	9/4/2007	101675	1	EA	15.95	0.000		
CR	9/4/2007	101779	1	EA	15.95	0.000		
CR	10/4/2007	101707	1	EA	15.95	0.000		
CR	12/5/2007	101671	1	EA	15.95	0.000	Buffington, Jay	BUFFI
CR	12/5/2007	101780	4	EA	15.95	0.000		
CR	1/4/2008	101794	1	EA	15.95	0.000		
RM	2/11/2008	0000006-1	2	EA	15.95	42.000	Bookazine (Test Account)	BKAZN
RM	2/12/2008	0000007-1	8	EA	15.95	42.000	Bookazine (Test Account)	BKAZN
RM	2/22/2008	0000008-1	10	EA	15.95	42.000	Baker & Taylor (Test Account)	BAKEF

- **Print labels**; edit On Hands with audit trail; send one or more items to PO or return invoice; create a cloned copy of an inventory record; globally reassign Section, Department, Publisher and other criteria for selected records

- **Powerful Quick Inventory Add** feature pulls bibliographic information from database of books in print; facilitates quick entry of large numbers of Inventory records

- **Query and reporting functionality** allows you to create, name and save ad hoc reports; selected records can be printed or exported to a PO or external file format like XLS or CSV file

Customers

- In a **tabbed** display, the Customers screen shows a summary List
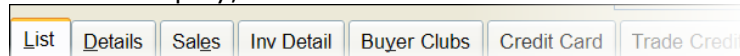
  view; Details: sales history; list of purchases, returns and special orders; current frequent buyer club details; and trade credits details (with optional used book module)

- **Details** include, in addition to name and address information, special tax and discount information, and email address for integrated email communications with customers in special orders handling screens and

  elsewhere. (When the email icon on the toolbar lights up in green you have a valid email address for the current customer and can send them email using customizable templates.)

- **Export / Import** tools for data adjustments to customer records outside of Anthology for import back in to update records.

- Sales history information for the customer is available with monthly totals in spreadsheet grid/graph form on the **Sales** tab; and item by item on the **Inv Details** tab

- **Buyers Club** tab shows a list of all the store's book clubs, the type of each club (counting dollars spent in this case), whether or not the customer is enrolled, their current level, a cumulative total of dollars spent counted for this club, and the last date a reward was earned

Name	Type	Required	Enroll	Current	Cumulative
Your Bookstore Club	$	100.00	☑	83.89	83.89

- Show customer's current **trade credit** information (with the used book module only)

- Construct **queries** that let you select a group of customer records for editing, reporting, export to a mailing list, or other operations.

Vendors

- In tabbed display, the **Vendors** screen shows a summary List view of all vendor records; details

| List | Details | OH/OO | Sales | POs | Returns | Addresses | Disc Shedules | EO |
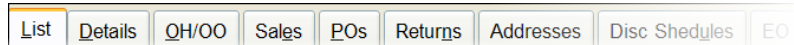
including terms, preferred ISBN format, and standard shipping instructions; on hand, on order and other information about all books associated with the vendor; sales history information in monthly grid or graph formats; a complete list of all PO history with the vendor (inc. orders and receiving); addresses; discount schedule information for the vendor; and electronic ordering information

- **Electronic ordering** with all major vendors

- Address fields include email addresses for billing, ordering, and shipping contacts. When the email icon on the toolbar lights up in green you have a valid email address for the current vendor and can send them messages using customizable templates (for example, when a damaged or wrongly shipped book arrives in receiving) or **email POs**

- Imprints can be assigned to parent vendor for consolidated ordering

- Construct **queries** that let you select a group of vendor records for editing,

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reporting, export to a spreadsheet, or other operations.

- Multi select of option for key fields to efficiently narrow search.

- Join statement to select by AND / OR for desired effect.

Taxes

- Taxable or non-taxable classes of merchandise (Departments) can easily be flagged

- **Tax profiles** (resident, student, etc) can be created for multiple taxes; easily deal with complex tax situations

- Complete sales tax reporting via the Historical Ztape (see below)

Customer Discount Schedules

- **Multiple customer discount schedules c**an be created with multiple levels and other options; associate discount schedules with customers or individual orders; optionally use discounts as frequent buyer club reward

Tenders

- An unlimited number of tenders can be created

- Specify order in which tenders appear in the Cash Register; assign

numeric codes for fast data entry

- Specify tender type, whether or not to allow change, and a number of other options. For example, specify a dollar amount above which store credits or a gift card must be given rather than cash.

Reporting

- Anthology has **dozens of built-in reports**, many highly customizable, for sales history, inventory status, purchasing and receiving history, etc., a sample of which are shown below

- Powerful **Query and reporting functionality** allows user to create, name and save ad hoc reports on Inventory, Customers, and Vendors (as described above); selected records can be printed or exported to a PO or external file format like XLS or CSV file

- Most reports can be exported to files as well as sent to the printer. File formats include XLS, CSV, DBF, PDF and HTML
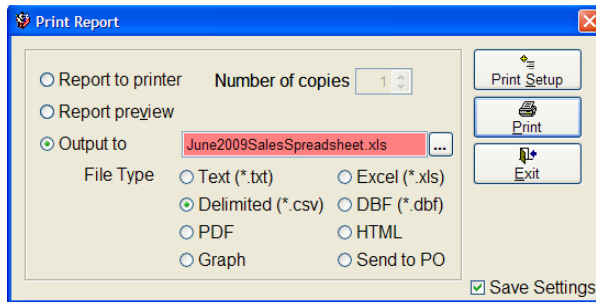
A/R Sales Summary Report

- The A/R Sales Summary Report allows you to see those **sales made on account** to a customer:

A/R sales summary
For period beginning 2/5/2003 thru 2/28/2003
Totals By Customer Name, Title/Descript

SKU	Description	Units	Retail $	OH	OO
0064472299	Extra Innings	1	5.99	9	0
0060291613	Meow : Cat Stories From Around The World	1	20.01	9	0
0023150602	Personal Financial Planning : Your Guide To A	1	21.95	-1	0
	Totals for Customer Name: **Adams Larry**	3	47.95		
1563708558	200 Best Jobs For College Graduates	1	16.95	9	0
	Totals for Customer Name: **Maule Tom**	1	16.95		
Total books sold:		4	64.90		

Sales History report

- **Highly customizable** Sales History report allows for filtering by department, section,
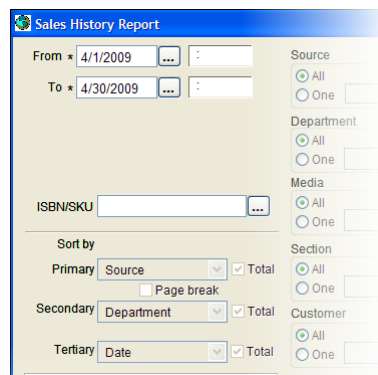
customer, vendor, user defined fields, and many other options; specify **sorts** with sub-totals up to three levels deep; available in a variety of report formats; results can be printed or **exported** to a spreadsheet or Anthology purchase order.

- Special **bestseller and slow sellers** options

Customer Back Orders report

- Customer Back Orders report can report on one customer or all customers; on customer order back orders or **special orders** only, or both
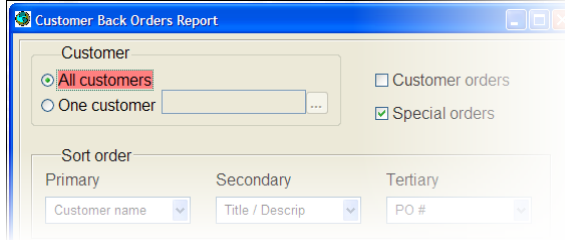

Daily Sales report

- Daily Sales report gives a **quick snapshot** of the day's sales. Sort by vendor, section, ISBN, etc.;

Daily Sales Report
Totals By Publisher, ISBN/SKU
Date: 1/11/2009

ISBN/SKU	Title/Descrip	Author	Pub	Sect	Media	OH	OO	Day	Retail	CrrMnth	LstMnth	YR
6311612704	A Salsa Tribute To The Beatles	Various Artists	B & t			5	0	1	12.98	0	0	1
0345485793	Charlemagne Pursuit	Berry, Steve	Ballantine Books	FICT4	HRD	6	0	1	26.00	0	0	1
0345495004	Loving Frank : A Novel	Horan, Nancy	Ballantine Books	FICT4	PAP	3	0	1	14.00	0	0	1
0385340990	Guernsey Literary and Potato Peel	Shaffer, Mary	Bantam Dell Pub	FICT4	HRD	3	0	1	22.00	0	0	1
038534239X	Going To See the Elephant	Fishburne,	Bantam Dell Pub	FICT4	HRD	6	0	1	22.00	0	0	1
0385342586	Lima Nights	Arana, Marie	Bantam Dell Pub	FICT4	HRD	6	0	1	25.00	0	0	1
0385526199	Blindspot	Kamensky, Jane	Bantam Dell Pub	FICT4	HRD	6	0	1	24.95	0	0	1
0553806793	Face at the Window	Graves, Sarah	Bantam Dell Pub	MYST2	HRD	6	0	1	22.00	0	0	1
0553807137	Your Heart Belongs to Me	Koontz, Dean R.	Bantam Dell Pub	FICT4	HRD	6	0	1	27.00	0	0	1
0425224988	Defending Angels	Stanton, Mary	Berkley Pub	MYST2	PAP	6	0	1	7.99	0	0	1

Inventory Status report

- Inventory Status report can produce a wide variety of reports, including **total value of inventory at both cost and retail**; out of stock books, on order books; books received after a certain date, etc.

25
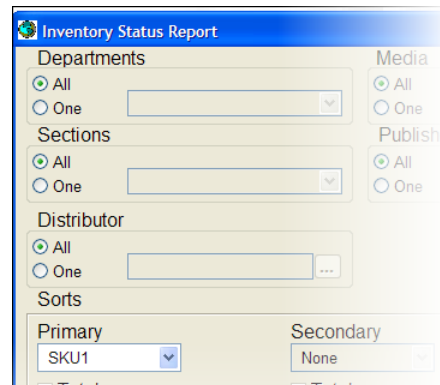
Purchase Order Status report

- Report on draft POs, open POs, or completed POs. Report shows quantities and dollar values at both cost and retail. Filter by vendor, department and PO status

Vendor	PO #	ShpmtDate	Status	SKU1	SKU2	Title	Department	Pub Date	Qty Ord	UOM	Qty Rec	Outst	Unit Cost	Total Cost	Open Bal	Retail Price
Baker &	000027	01	04/29/09	Open	0866367802	6306152784	Roomstyling	Book	05/11/03	1	EA	0	1	11.97	11.97	11.97	19.95

Overstock Returns report

- Track overstock returns; filter on draft returns, open returns (out to the vendor for approval), or completed returns. Reports show either summary or details, with units, value at cost, and value at retail

Historical Ztapes report

- The Historical Ztapes report allows you to reprint Ztapes for **any day or any range of days**; useful for sales tax reporting,

credit card tenders reporting, and research.

Receiving History / Co-op report

- The Receiving History / Co-op report can be used to report on totals received from any given vendor; it also can be used to generate direct and indirect totals for any given publisher (i.e., totals of a given publisher's books purchase directly from the publisher and indirectly through distributors); these numbers will show the size of the **co-op pool** for the publisher

Hourly Sales Graph

- The Hourly Sales Graph report shows averages in terms of average number of sales, average amount of sale, and total dollars per hour for any specified range of dates. Very useful for **planning staffing**.
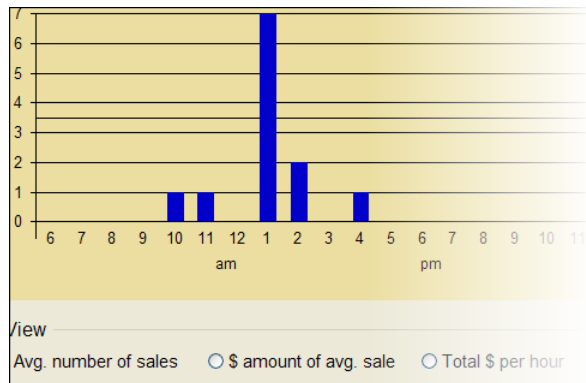
Comparative Sales History report

- The Comparative Sales History report makes possible the comparison of year-over-year comparisons of a given department, section, or media type

Business Center

- The Business Center provides a central focal point for tracking every aspect of your business: inventory levels, sales, receiving, and more

And **dozens of other reports**, including Daily Sales, Inventory Levels, Used Books, Sales and Returns, Gift Cards, New Books, On Order, Sales and Receiving Analysis, and Book Fairs.

Customer Relationship Marketing

- Optionally track **detailed or summary sales history** for customers through Cash Register, Customer Orders and other sales modules

- **Customer Relationship Marketing Tool** allows creation of mailings to groups of customers based on sales history, interest, geographic location and other factors. Highly customizable.

- **Upload selected or all customers in a list** to Constant Contact and other services; print labels; print reports or export to spreadsheet or other file formats
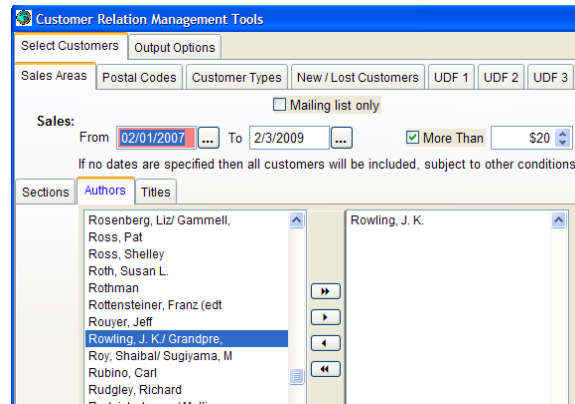
Security

- Optionally control scores of functions for every user; Cash Register alone has 14 different controllable functions

- Supervisor overrides

- Templates make it easy to assign privilege sets to new employees

- Optionally skip or force user login

- Optionally force logging of clerk on each sale; optionally require password
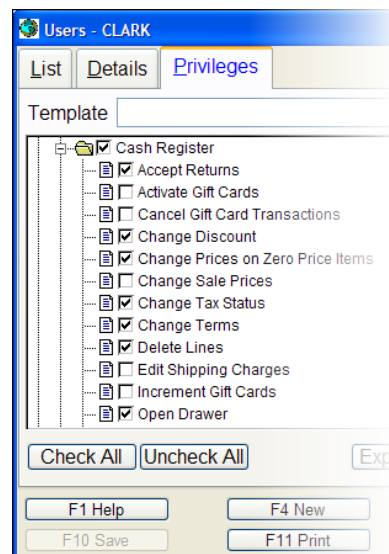
Utilities

- **Powerful Import External Data screen allows import of data from a variety of third-party sources**

  - Import data from Bowker Books In Print, Ingram Companion, Above the Treeline, and other third-party sources

  - Send data to Inventory Only, or add to PO, Customer Order, Return Invoice, etc.

  - Use Reassign to globally change Section, Department, Media, Distributor, or Qty in imported data

- **LogSender** optionally sends logs to Anthology via ftp for support analysis

- Built-in calculator

- **LoadData** utility leverages books in print databases to make initial data acquisition quick and easy

- Export data to 3rd party web sites

- Utilities for database reindex, rebuild keywords, ensure database consistency

- **Quick Backup** saves archived (zip) data for backup

- Specify number of Quick Backups to save

- **Built-in Scheduler** automates Quick Backup, database reindex, Above the Treeline export and other tasks

  - Tasks can be assigned to run at fixed times or linked to one another

  - Scheduler can be optionally set to begin waiting immediately after Ztape

- Optionally export AP transactions to **QuickBooks** or Excel

- Optionally export AR transactions to QuickBooks or Excel

- Optionally export to **Above the Treeline**
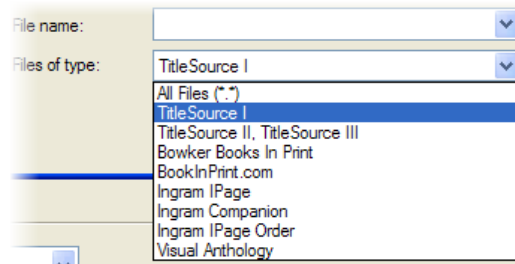
Help and Support

- Built-in, context sensitive **Help system** provides detailed information and step-by-step instructions

- Anthologysoftware.com website offers FAQs, user forums, tips and tutorials

- Frequent, **free webinars** introduce new features and functionality.

- Professional, courteous tech support available during regular business hours; emergency tech support after hours and on certain holidays for customers with a maintenance contract.
- Maintenance contract entitles **free upgrades**; recent version upgrade contained dozens of new features and enhancements.
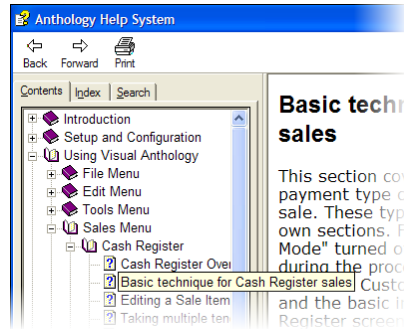
Optional Used Book module

- Powerful **Buy Books screen** lets you dynamically calculate buy and sell prices based on store sales history, Amazon sales information, and predefined rules. Wants tab lights up red when there is a customer request on file for a title; provides full details and contact info


- Serialize (i.e., provide unique SKUs) for multiple copies of same ISBN; specifying condition, etc for each copy

- Manage issuing and redemption of **trade credits**

- Specify message to print on trade credit receipt

- **Upload** to Amazon, Fillz, ABE, and other 3rd-party sites

Optional Multi-store module

- Manage your whole organization from a **central location**

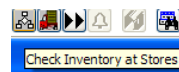- Get full reporting in **near-real time** on sales, receiving, transfers and every other aspect of your business
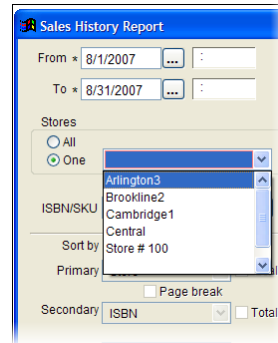
- Create **consolidated POs** with allocations for individual stores; drop ship to the stores or receive centrally and transfer to the stores

- **Transfers** between stores and between stores and central; stores can request transfers; central office can quickly and easily **decree transfers** between stores
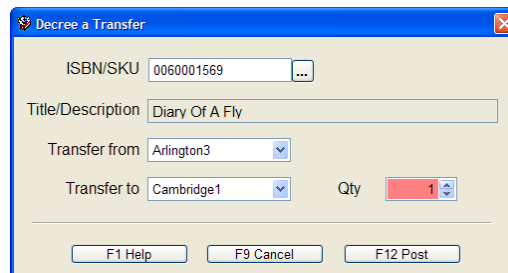
- Customers can share **gift cards, trade credits, or frequent buyer credits between stores**; purchases made at any store can count toward frequent buyer club totals.

- Stores can easily **check on hand levels at sister stores** using toolbar button; and request transfers