

APPENDIX A SPECIFICATIONS & REQUIREMENTS

Scope of Bid

This IFB is seeking bids for a comprehensive, specialized, college enterprise automation system. The successful proponent must demonstrate that their system satisfies the requirements set forth in this document. Each question in this and following sections represents a requirement. To be considered, your system must meet all of the following general and specific requirements, which follow.

The following is a general description of the nature of the system, which we are seeking:

A back-office computer and software performing the following general functions:

Specialized, comprehensive multi-store inventory management facilities with specialized applications for each of the following: textbooks, general books, and non-book merchandise. It shall also be capable of maintaining real-time perpetual inventories at the store, department, class, category, SKU or size/color/imprint level as appropriate. The applications must fully support EDI for purchasing activity.

Accounting capabilities, including accounts payable, accounts receivable and general ledger.

The inventory and financial applications must support up to 999 separate stores and up to 999 divisions (units) per store.

Point-of-sale support capabilities, including automatic preparation of price-look-up files, credit authorization files and the capability of transmitting these files to a point-of-sale system on a user-defined interval. A process capable of accepting complete transaction files from the POS system, provisions to allow the user to audit point-of-sale activity and automatically post to the proper general-ledger accounts and post sales activity to the perpetual inventory. In addition, it must post in-house charge and financial aid charge activity occurring at the POS to the accounts receivable files.

Point-of-sale (POS) hardware and software with the following features:

It must be capable of processing merchandise marked according to the Bookland-EAN bar coding standard.

It also must provide facilities for price-look-up, complete transaction logging, in-house credit authorization and bank-card authorization with draft capture.

The POS must be able to handle the split tender in a single transaction for all tender types.

The POS must have a thermal/impact printer.

The POS must fully support Electronic Journal.

The POS must support the real time communication of price from the host inventory applications without disruption to the POS activity.

The POS must support the real time communication of sales from the POS system to the host inventory application without disruption to the POS activity.

The POS should have fully integrated campus debit card capabilities.

In addition, the successful system must have the following features:

The system must be modular, allowing for installation and implementation in a step-wise fashion.

It must be a fully integrated system. For example, receiving information keyed into the inventory module must be available for use in accounts payable with appropriate controls and audit trails.

The back-office software must run on a true multi-user multi-tasking computer system. The computer hardware must have multiple specialized processors handling the various tasks such as workstation I/O, Disk I/O, etc. Multiple terminals and printers, including price-tag (bar code) printers must be supported. Adequate facilities for communications and backup must be available.

The system must provide hierarchical password security, with a single, central password system for all applications, except POS. Each password must have a separate authority level definable for each application module. Since the POS system is to operate without dependence on the back-office computer, it must provide its own hierarchical password system.

Hardware components must be available from several manufacturers and distributors to provide Pierce College with the best available price. Service for all major hardware elements must be locally available.

Does the system you are proposing meet all of the foregoing General Requirements?

Background Information

Institutional Information

Pierce College is a flourishing two-year public institution in Southern California providing opportunities for occupational training, transfer education and life-long learning.

Founded in 1947, Pierce is a comprehensive college with almost 100 disciplines being taught to more than 23,000 students each semester. It is one of the nine colleges of the Los Angeles Community College District, and is fully accredited by the Western Association of Schools and Colleges, a nationally recognized accrediting agency.

Pierce College is proud to be recognized as one of the most respected community colleges and transfer institutions in California.

The institution utilizes *SAP* for A&R and A&P functions. Respondents should take note that any system proposed should have the capability to be integrated with the *SAP* system.

Operations' Descriptions

The system must be able to support the functions of 4 operations (stores) at Pierce College: The Student Store (the bookstore); Freudian Sip (cyber café); CopyTech (reprographics); and the Business Office. These operations have separate locations and are connected via the campus wide area network (WAN). The network routes TCP/IP traffic.

These four stores use a customized RATEX system from Total Computing Solutions and Design Technology, and have an immediate need to replace this system.

The Student Store has averaged \$6.8 million in sales over the past three years. It has a traditional product mix for a college store – textbooks, supplies, clothing, giftware and convenience store items. It wants to expand its product offerings through textbook rentals, increased online sales opportunities and digital textbook options.

Freudian Sip has averaged \$560 thousand in sales over the past three years. It offers large selections of coffee / espresso based drinks and grab-and-go food.

CopyTech has averaged \$20 thousand in sales of printing supplies and services over the past three years.

The Business Office supports the Student Store, Freudian Sip and CopyTech by producing daily collection reports from sales. It also supports the Bookstore in the creation and maintenance of financial aid accounts and transactions.

Stores' Sizing Information

The Student Store uses 16 back-office workstations for item ordering, receiving, accounting, and maintenance. There are 12 point-of-sale terminals installed at the Student Store and six hand held Worth Data Recorders for inventory taking. The proposed replacement inventory control devices should be wireless and capable of performing most system functions.

CopyTech uses 2 back-office workstations for item ordering, receiving, accounting, and maintenance. There is 1 point-of-sale terminal installed at CopyTech.

Freudian Sip uses 1 back-office workstation for item ordering, receiving, accounting, and maintenance. There are 2 touch screen point-of-sale terminals installed at Freudian Sip;

The Business Office uses 3 back-office workstations for accounting and maintenance. There are 2 point-of-sale terminals installed at the Business Office.

Bid Submission Information

Bid Form

Bid Response must closely follow the format below:

1. A schedule of the back-office computer system hardware, including all associated peripherals such as printers and display terminals. Show the details as to disk sizes, internal memory size, communications lines, etc. This should be a priced configuration itemizing prices for all components. If hardware is to be supplied from more than one vendor, provide a separate schedule for each vendor. Show a total for all items from each vendor.
2. A schedule of the back-office computer system software, including operating system. This should be an itemized list with prices for each item. If software is to be provided by more than one vendor, provide a separate schedule for each vendor. Show a total for all items from each vendor.
3. A schedule of the point-of-sale system hardware, including all items. This should be an itemized list, with prices for all components. If hardware is to be supplied from more than one vendor, provide a separate schedule for each vendor. Show a total for all items from each vendor.
4. A schedule of the point-of-sale system software, including operating system. This should be an itemized list, with prices shown for each item. If software is to be provided by more than one vendor, there should be a separate schedule for each vendor. Show a total for all items from each vendor.
5. A schedule of the maintenance charges for all hardware in this bid.

6. A schedule of the support charges for all software in this bid.
7. A separate schedule of the installation charges that include onsite services.
8. A separate schedule of training charges with a detail listing for each application requested in this RFP.
9. A separate schedule of any warranties which may apply.
10. Because many vendors of college bookstore software are also dealers in college textbooks, discounts on system prices are often available in exchange for sales of books. Attach a schedule showing any discounts available, and set forth the terms under which we may qualify for these discounts.
11. Attach a schedule indicating who is responsible for installation of the various components of the system.
12. Attach a suggested installation timeframe.

General Requirements

Vendor Background

- _____ 1. How many years has your company been in business?
- _____ 2. How long have you been a provider of computerized bookstore systems?
- _____ 3. What is the total number of employees of your firm?
- _____ 4. How many full time employees are dedicated to system development?
- _____ 5. How many full time employees are dedicated to software support?
- _____ 6. How many full time employees are dedicated to hardware support?
- _____ 7. Is your firm also a wholesaler of college textbooks?
- _____ 8. Describe briefly why you think this is an advantage or disadvantage.
- _____ 9. Who manufactures the main computer that you are proposing?
- _____ 10. Briefly describe your relationship with this firm, and how it would benefit our institution.
- _____ 11. How many college bookstores are using one or more of your software products?
- _____ 12. How many of your installations are using all or nearly all of the same application software products as you are proposing here?

- _____ 13. Of the installations in item eleven above, how many are running the same version or release of these applications?
- _____ 14. Of the installations in item twelve, how many are using the same computer and point-of-sale equipment as you are proposing here? (Disregard differences as to size, brand, or capacity.)
- _____ 15. How many total lanes of point-of-sale does your company have installed in independent operated Bookstores?
- _____ 16. Provide a complete listing of five (any similar stores would be helpful) institutionally operated Bookstores

List must include:

Institutional Store, Contact and phone number
Number of stores operating
Date of Installation
Total Point-of-Sale devices installed
List of applications installed

Hardware

Your response to this RFP should include all necessary hardware to operate the system in our environment. It should include:

Back Office Server.

1. A true multi-user multi-tasking computer including operating system. In order to ensure adequate transaction throughput, it should be of modern engineering design, and include multiple specialized processors for handling tasks such as disk I/O, etc. It should include:

Hard disk drive(s) with adequate capacity to provide information storage. See the section *Operations' Description* for sizing information.

CD-ROM drive for loading applications, operating system, etc.

Provision for backup storage, whether tape or diskette. External tape media back up of entire system (operating system and application software) must be accomplished with a single tape.

Ethernet connection(s) with sufficient capacity to handle the number of display workstations and printers specified in the *Operations' Description*.

Sufficient internal memory to maintain response times within acceptable limits.

Sufficient communications lines and modems to support the requirements described in this RFP.

The operating system should support:

Security
File Management
Communications

A Relational Database manager taking advantage of ODBC
Must be Web Enabled

Back Office Server Main Processor.

1. Provide the following information about the back office computer you are proposing:

_____ *Manufacturer*

_____ *Computer Name*

_____ *Model Number*

_____ *Are more powerful computers that run this operating system and application available from this manufacturer?*

_____ *As proposed, is a CD/DVD ROM drive or network card included?*

_____ *As proposed, is a tape drive or CDRW drive included?*

_____ *What is the maximum capacity of this drive?*

2. Indicate the following capacities of the back-office computer. In the column marked *As Proposed*, indicate the capacity of the computer as proposed. In the column marked *Max. this Model* indicate the capacity to which this model can be expanded.

	As Proposed	Max. this Model
<i>Hard Disk Size</i>	_____ Gb	_____ Gb
<i>Main Memory Size</i>	_____ Gb	_____ Gb

3. Does the system support external communications via the Internet for the following functions:

_____ Electronic Customer Support

_____ PUBNET and EasyLink

_____ Local Point-of-Sale

Back-Office Operating System

1. Provide the following information about the operating system, which will run on the back-office computer:

- _____ *Operating System Name*
- _____ *Operating System Brand*
- _____ *Does the operating system utilize graphical user interface for all functions?*
- _____ *Can the operating system run on at least 10 hardware manufacturer server platforms?*
- _____ *Does the operating system include context sensitive help?*
- _____ *Is true multi-tasking supported?*
- _____ *Is multiple user login supported?*
- _____ *Is multi-level password security supported?*
- _____ *Is the operating system web enabled?*

Electronic Support

- _____ 1. In the event of a malfunction, can this computer detect and diagnose the problem?
- _____ 2. Can temporary fixes to the operating system be transmitted to the computer over Internet or dial-up telephone line?
- _____ 3. Can the application software vendor diagnose problems, monitor operation, and supply software fixes to this computer over Internet or dial-up telephone line?
- _____ 4. Is all hardware and software necessary for this electronic customer support included in your bid?

Operation

- _____ 1. Describe briefly the technical expertise required to operate this computer.
- _____ 2. Is training in the operation of this computer available locally?

____ 3. Who provides this training?

Hardware and Operating System: Point-of-Sale

General

____ 1. The Point-of-Sale System should include the following elements. Does your bid include all hardware and operating system software needed to provide:

-A central store controller, capable of operating independently from the host back-office computer. Keep in mind there are four stores requiring Point-of-Sale systems.

-A series of point-of-sale terminals (cash registers).

-A means of electronically transmitting data between the back office computer and the point-of-sale controller.

-A means of electronically obtaining bank credit card and campus debit card authorizations, and performing electronic draft capture.

____ 2. Who manufactures the point-of-sale hardware proposed?

____ 3. What model is proposed?

____ 4. Does this model as proposed run Microsoft XP or higher?

____ 5. Can the POS be supported electronically over the Internet for the purpose of problem diagnosis, and to apply software fixes?

Central POS System Control

1. The POS System must include computer(s)/server(s), which will function as central points of control for the all POS terminals in each store. Does the POS controller(s) proposed include:

____ *-CRT or flat panel monitor display(s) for the operator?*

____ *-Laser printer(s) for system reports?*

____ *-Hard disk drive(s) with at least 40GB of Disk capacity?*

____ *-Removable-medium storage device(s) (tape or CDRW) for creating backups?*

- _____ 2. As the single central point of control, the store controller must act as a central source for software and data for the POS terminals. In the system you are proposing, do the following files reside primarily on the store controller:
- _____ *-Price-look-up file?*
- _____ *-Detailed transaction log?*
- _____ *-Application Software?*
- _____ *-Parameter files (tax tables, personalization files, etc.)*
- _____ 3. In order to provide more efficient bank credit card authorization, does the store controller handle all requests for transaction approval over a single telephone line or via the Internet?
- _____ 4. The system must allow the POS terminals to continue to process transactions in the event of controller failure. This means that either a second backup controller be available, or the POS terminals must be capable of processing transactions while the controller is down. Place an X opposite the method, which is proposed here.
- _____ *-Backup Controller.*
- _____ *-POS terminals can function on their own while controller is down.*
- _____ 5. Is the method you are not proposing also available?
- _____ 6. If you indicated that this bid includes a backup controller, it must have a means of insuring that the files on the two controllers are always in synchronization. Does this take place automatically, without the need for user intervention?

Point-of-Sale Terminals.

- _____ 1. Each point-of-sale terminal must be modular, allowing for easy replacement of a failing component. Are each of the following components included in each terminal as proposed?
- _____ *-Base unit, containing the processor, memory, etc.*
- _____ *-Three position lockable cash drawer, with removable till.*
- _____ *-Keyboard, with a minimum of QWERTY and programmable POS function keys, all of which must be user definable except for the ten-key pad.*

_____ -Operator CRT or flat panel display capable of displaying at least 80 columns of characters per line to allow for operator lead through instructions and transactions in process.

_____ -Customer display, capable of displaying at least two lines of twenty characters each (total 40 characters) to allow for customer information.

_____ -A Thermal/Impact cash register type printer, capable of printing customer receipt and inserted slip documents.

_____ -Bar code scanner capable of reliably reading standard UPC and Bookland-EAN including suffix bar codes, as well as any other bar codes which your system may require. This must be a visible light scanner.

_____ -Dual track magnetic stripe reader for input of bankcard data.

_____ -Support for touch screen technology on the register display.

_____ -Customizable receipts

_____ 2. Can each terminal perform self-diagnostic tests to determine and report malfunctions?

_____ 3. If a terminal is disconnected from the system, can the other devices continue to operate normally?

_____ 4. Can terminals be easily moved (assuming that cabling is in place at the new location)?

Implementation, Training and Support

_____ 1. Describe briefly your method of providing software support.

_____ 2. Is support available using a toll-free telephone number?

_____ 3. Is this toll-free number answered directly by a support person or dispatcher equipped to answer questions and help with problems?

_____ 4. Is a tracking number assigned to the call?

_____ 5. Will support personnel have exactly the same software as proposed here, loaded on the same make of equipment as proposed here, available at all times in order to simulate our environment for problem resolution?

- _____ 6. Can you provide support electronically over the Internet in order to diagnose problems, assist users, and transmit and apply software fixes on both the back office software and point-of-sale software?
- _____ 7. Does your application software include on-line context sensitive help in a graphical user interface?
- _____ 8. Are application software enhancements included as part of the maintenance fee?
- _____ 9. Briefly describe your method of providing user training for application software.
- _____ 10. Is training conducted on the same equipment as is proposed here?
- _____ 11. Is re-training available after the initial installation period?
- _____ 12. Is advanced training available?
- _____ 13. List the user documentation you will provide.
- _____ 14. Provide a schedule of application software training fees in your cost proposal.
- _____ 15. Attach a schedule of application software support fees in your cost proposal.

Maintenance

Hardware Maintenance and Support

- _____ 1. Describe briefly your method of providing hardware maintenance and support.
- _____ 2. Is support available using a toll-free telephone number?
- _____ 3. Can we provide our own server hardware, provided it meets your specifications?
- _____ 4. Is a hardware maintenance/support contract available locally?
- _____ 5. During what hours is repair coverage available?
- _____ 6. Does the application software vendor also have hardware technicians on staff to assist in diagnosing software/hardware interaction problems?
- _____ 7. Attach a schedule of hardware warranty information at the end of your response to this RFP.

Specifications

Inventory Control System

The inventory management module must be a comprehensive perpetual inventory management system designed specifically for the college and university bookstore industry. The application must provide for Item maintenance, Vendor maintenance, textbook adoption management, purchasing, electronic order communication/EDI, receiving, returns processing, textbook buyback, and full management/user driven reporting utilizing an easy to use report writing tool. Item inventory functions must be fully integrated to the accounting and Internet/Web modules. The entire inventory control system module must support a multi-store environment.

Navigation

- ___ 1. Does the system provide a graphical user interface throughout the entire inventory control system?
- ___ 2. Does the system support menu jumping?
- ___ 3. Does the system support drag-and-drop between screens to decrease the need for searches?
- ___ 4. Do all inventory control system screens use the same user interface?
- ___ 5. Are toolbars available to assist in navigation?
- ___ 6. Can the user define multiple workspaces?
- ___ 7. Can the user save these workspaces?
- ___ 8. Can the user utilize the Windows clipboard and keyboard shortcuts (CTRL-C for copy, CTRL-X for cut, and CTRL-V for paste) within the application?
- ___ 9. Can multiple windows (sessions running on the same workstation) be running without affecting server performance?

Inquiries and Reports

- ___ 1. Does the system provide inquiry by keyword for all item types, book and non-book?
- ___ 2. Can a search be conducted with a combination of any of the following?
 - ___ SKU/Stock Keeping Unit Number
 - ___ Barcode
 - ___ Merchandise Classification/Department-Class-Category
 - ___ Vendor Code, Name or Alias

- ___ Book ISBN
- ___ Author
- ___ Title Keyword (anywhere in the title)
- ___ Textbook Bookkey
- ___ Textbook Course
- ___ Textbook Instructor
- ___ General Merchandise or Package Catalog Number
- ___ General Merchandise or Package Keyword (anywhere in the description)

- ___ 3. Can a search for the same book title in text and trade be conducted in a single step?
- ___ 4. Can complex searches (involving multiple indices) be conducted? For example, all books with author of SMITH and title that contains the exact word BIOLOGICAL.
- ___ 5. Can a previous search be retained once an item is selected?
- ___ 6. Can a search result be sorted?
- ___ 7. Can a search be limited to a database type (store stock only, books-in-print only, general merchandise only, etc.)?
- ___ 8. For searches that utilize multiple databases, is a visual indicator present to show the user the source of the item in the search result (e.g. store text database, books-in-print)?
- ___ 9. Can a customized search be conducted?
- ___ 10. Can a customized search be retained?
- ___ 11. Can a custom list of items be used throughout the system (to generate markdowns, returns, sale items, etc.)?
- ___ 12. Does the system provide an inquiry for buyers which shows sales, inventory and order information for all items and down to the color/size/imprint levels for general merchandise?
 - ___ Item Information
 - ___ Vendor Information
 - ___ Purchase History
 - ___ Receiving History
 - ___ Proposed Returns
 - ___ Sales History
 - ___ Invoices
 - ___ Special Orders

- By Departments
 - Textbook Course Request History
 - Textbook Term History
 - Textbook Database Information
 - Merchandise Transfer Requests
 - Merchandise Transfers
 - Serial Numbered Items' Information
 - Is this information available throughout the entire inventory control system?
13. Does the system provide for comparative performance between various divisions, departments and classes?
14. Does the system provide the user flexible selection criteria on key inquiries and management reports including:
- By Stores
 - By Departments
 - By Classes
 - By Categories
 - By Vendors
 - By Stores
 - Sales data
 - Purchases data
15. Does the system provide a monthly and annual sales inquiry by SKU providing 24 months of sales history and current on order and on hand?
16. Is a turns report available from the inventory module for all merchandise types?
17. Can all reports be displayed to screen prior to printing?
18. Can reports be graphical (such as bar chart, pie chart)?
19. Can all reports be exported directly from the desktop in native Microsoft Office formats?
20. Can all reports be sent via email attachment directly from the desktop?
21. Can customized reports be created and saved?
22. Can information for multiple stores be viewed on a single screen?

Transfers for Multiple Locations

- ___ 1. Does the application support inter-store transfers?
- ___ 2. When discrepancies occur during store transfers, responsibility for the discrepancy must be booked to either the sender or receiver, depending upon store policy. Does your system support both approaches, allowing the user to choose?
- ___ 3. Can the system suggest transfers for balancing inventory between locations based upon user defined model stocks of supply?
- ___ 4. Does the Transfer function provide the user the following selection criteria when generating suggested transfers:
 - ___ By Stores
 - ___ By Departments
 - ___ By Classes
 - ___ By Categories
 - ___ By SKU's
- ___ 5. Can the user edit the selected transfers created?
- ___ 6. Can the user determine when to post suggested transfers?

Pricing

- ___ 1. Does the application provide facilities for price changes, including markups, markdowns, and markup/markdown cancellations?
- ___ 2. Can mark downs be indicated as temporary?
- ___ 3. Does the system suggest mark down candidates?
- ___ 4. Is a history of price changes tracked by authorized user and date/time stamp?
- ___ 5. Do markdowns report the following information?
 - ___ Effective Date
 - ___ Default to existing on hand
 - ___ Temporary price change
 - ___ Ending Date for temporary price change
 - ___ Update SKU cost
 - ___ Update SKU retail in Purchase Orders
 - ___ Write off status
 - ___ Comment

- ___ 6. Can the information within the price change be maintained?
- ___ 7. Does the application allow the user to specify the exact date to update the price change to inventory?
- ___ 8. When processing markups/downs, does the system allow the price change to be applied as a dollar amount?
- ___ 9. Can price changes be date stamped with a start and end date and feed the PLU files at the appropriate time?
- ___ 10. Can price changes be created on the system at any time prior to the specific "effective" date?
- ___ 11. Will the system automatically communicate the price changes established to the point-of-sale based on the user defined "effective" date of the price change?
- ___ 12. Will the system automatically communicate to the point-of-sale the original price based upon the user defined "end" date of the price change?
- ___ 13. Will the system calculate/book markdown dollars for the exact number of items sold during the price change specified "effective" and "end" dates?
- ___ 14. Can price changes be store specific for selected stores?
- ___ 15. Does the price change functionality provide the user the option of printing advisement forms for price change communication to the store location(s)?
- ___ 16. Will the price change function provide for the assignment of "reason codes" to the specific price change for store communication purposes?
- ___ 17. Is a comment line provided for user defined price change instructions?
- ___ 28. Can the user indicate that the SKU/Item file cost is to be updated from the Price Change feature?
- ___ 19. Can the user indicate that the retail price on all open purchase orders is to be adjusted from the Price Change feature taking into account the purchase orders expected ship date in relation to the price change effective date?
- ___ 20. Can Mark down cancellations be processed from the Price Change feature?
- ___ 21. Can Mark Up cancellations be processed from the Price Change feature?

- _____ 22. Does the system maintain records of the store's selling price and track markups, markdowns and markdown cancellations?
- _____ 23. Is the system capable of handling freight-pass-through pricing, with automatic calculation of actual gross margin?
- _____ 24. When updates to the general bibliographic database are applied, does the user have the option of also updating local database records, including prices?

General Price Control Requirements/Sale Events/Membership Sales

- _____ 1. Does the system provide a facility for starting and ending promotion pricing on specified items on particular dates?
- _____ 2. Does the system support multiple discount plans with user defined percentage off by classification of merchandise?
- _____ 3. Can promotion plans, or sale events, be set up in advance?
- _____ 4. Can a sale event be specified for the following?
 - _____ A single Unit
 - _____ A manual list of items
 - _____ By department, class or category
- _____ 5. Can the system support item discounting on an automated basis, no cashier action required, and have the discount report as a markdown to the stock ledger?
- _____ 6. Does the system provide the ability to process a price check at the POS terminal?

Merchandise Marking

- _____ 1. Does the Inventory Control System Module produce bar code labels for items and books, which are not vendor marked?
- _____ 2. Are multiple ticket formats provided in order to accommodate the various merchandise types typically found in college stores?
- _____ 3. Does the Inventory Control System Module support vendor source-marked items which follow industry standard Bookland-EAN (for book merchandise) and UPC (for general merchandise items) bar code formats?
- _____ 4. Are new textbook labels printed with the EAN extension of 90000 and used textbook labels printed with the 99990 extension?

- ___ 5. Are trade book labels printed with the EAN extension following the format of 50000?

- ___ 6. Does the application provide the user control over the ticket printing process including the following selections:
 - ___ For purchase orders based receipts
 - ___ For selected purchase orders
 - ___ By SKU's

- ___ 7. Can bar code labels produced by the system include the following:
 - ___ date received
 - ___ SKU
 - ___ Barcode (Bookland-EAN or UPC as appropriate)

UPC Translation

- ___ 1. Does the application provide for full UPC translation (multiple barcodes per SKU) to solve the problem of vendors creating new UPCs for existing SKU's/items?

- ___ 2. Does the UPC translation protect the store from having to create a new SKU/Item record?

- ___ 3. Does the UPC translation process protect all existing SKU/item history and data?

- ___ 4. Can the UPC translation support multiple UPCs assigned to single SKU/Item?

- ___ 5. Does the UPC translation functionality allow for the assignment of vendor UPC codes to individual permeations with in a SKU/item (such as color, size, and imprint permeations within a specific style)?

- ___ 6. Will the system communicate the UPC translation to the Point-of-Sale for price look up purposes allowing for the scanning of the vendor source marked UPC?

- ___ 7. Will all the sales data for SKUs/items assigned UPC translation code(s) correctly update to the original SKU/Item when processed from the Point-of-Sale?

- ___ 8. Will the UPC translation handle the event of temporary or deal items, which the vendor will mark with a different UPC than they use as standard for the item?

- ___ 9. Is the UPC Translation feature fully integrated to the Physical Inventory module allowing for scanning of the vendor UPC source mark and processing the update to the original SKU/item?
10. Will the following processes allow the entry of the UPC translation code(s) assigned for entry to retrieve the original UPC/SKU number for data access:
- ___ Transfer entry
 - ___ Purchase order entry
 - ___ Inventory adjustment
 - ___ SKU Price Verification
 - ___ Receiving entry
- ___ 11. Will the UPC translation feature work with foreign UPC codes that are longer than 11 digits?
- ___ 12. Will the UPC Translation feature allow for UPC's entered up to 18 digits in length?

Electronic Forms

It is the desire of the Bookstore to incorporate an Electronic Forms solution with the entire automation process. This solution would provide the ability to print form documents via laser printer, eliminating the need of the vast majority of preprinted from stock. The Vendor should have multiple page speed options available and the ability to incorporate multiple printers in the configuration capable of supporting the Electronic Forms solutions.

- ___ 1. Does the application allow the user to create form documents on blank stock via a designated printer?
- ___ 2. Can multiple printers be utilized in the configuration?
- ___ 3. Can the user customize printing logos and signature requirements?
4. Are electronic forms available for all of the following documents:
- ___ Text Book Requisitions
 - ___ All Purchase Orders
 - ___ All Credit Requests
 - ___ All Packing Lists for returns and text sales to wholesaler
 - ___ Text Shelf Tags
 - ___ Accounts Receivable Statements
 - ___ Accounts Payable Forms
 - ___ General Ledger Income Statement
 - ___ General Ledger Balance Sheet
 - ___ Statement of Cash Flow

Please include a sample document package of the Electronic Forms in your response.

Electronic Data Interchange (EDI)

The EDI functions should be a state of the art EDI translation and communications application fully integrated to the Inventory Control Module. The EDI application should provide for electronic transmission of purchase order data to EDI-capable vendors (suppliers). The application should be designed to receive “Purchase Order Acknowledgments” (POA’s) and Advanced Ship Notices (ASN’s) from the partner vendors/suppliers. The POA process should be able to receive current pricing information, confirmed quantities, and availability of each item on the purchase order. The EDI application should be fully integrated to the Receiving and Accounts Payable applications. The EDI application should be adaptable to the EDI software selected for supply chain management by the Similar Government.

- ___ 1. Does this EDI application allow buyers to create and transmit purchase orders to EDI capable vendors electronically within the Purchase Order function of the inventory control module, regardless of merchandise type?
- ___ 2. If a single purchase order is created for multiple stores, can the EDI module transmit a separate purchase order for each store on the order?
- ___ 3. Will the EDI application receive Purchase Order Acknowledgements (POA’s) from partner vendors/suppliers?
- ___ 4. Will the EDI application be able to receive the following POA information:
 - ___ Confirmation of current pricing
 - ___ Confirmation of quantities
 - ___ Item availability
- ___ 5. Does the EDI module utilize both Easylink and FTP protocols for communication of data to/from the vendor/supplier EDI partner?
- ___ 6. Will the EDI application feed the inventory control system receiving function electronically?
- ___ 7. Will the EDI module provide for the electronic receipt of Advanced Ship Notices (ASN’s) and/or invoices from Vendor/Supplier partners?
- ___ 8. Can the ASN’s and/or invoices be tied to receiving reports once received?
- ___ 9. Can the ASN’s and/or invoices tied to receiving reports be electronically fed to the Accounts Payable module?

- _____ 10. ISBNs are now assigned with a 13 digit number. Once the ISBN becomes a 13-digit number, the old BISAC Fixed-format for electronic orders and order acknowledgements is unable to handle the new, longer number, and will thus have to be replaced with a different EDI format. Can your system accommodate the new EDI format?
- _____ 11. Does your system support the fourteen-digit EAN/UCC-14 (a member of the GTIN, or Global Trade Item Number, family) as the new recommended standard for communication between trading partners?

Item Maintenance

Textbooks

The Textbook management module must be a comprehensive perpetual inventory management system designed specifically for the college and university bookstore industry. The application must provide for adoption management, purchasing, electronic order communication, receiving, returns processing, buyback, and full management/user driven reporting utilizing any easy to use report writing tool. Textbook functions must be fully integrated to the accounting and Internet/Web modules. The Textbook module must support a multi-store environment.

Textbook Databases

- _____ 1. Does the Textbook Module support all of the following distinct databases:
- Bibliographic database*
 - Database of local adoptions*
 - Database of vendors, including publishers*
 - Database of special order customers*
- _____ 2. Does this application support a bibliographic database of more than 300,000?
- _____ 3. Does this database provide cross referencing of old or obsolete ISBN's to the corresponding new ISBN's?
- _____ 4. Does this application support the new standard ISBN as it is now a thirteen-digit number?

- _____ 5. Does the application support Bookland EAN bard codes for 13-digit ISBN titles?
- _____ 6. Does the application support Bookland EAN bard codes for 13-digit ISBN titles with a prefix of “979”?
- _____ 7. Does the application support Bookland EAN bard codes for 13-digit ISBN titles with a prefix of “978”?
- _____ 8. Does this system support the loading of the entire database without the need for media (via Internet)?
- _____ 9. Is the text application integrated to the Internet/Web application with the ability for the Bookstore to control the data elements being made available through the Administrative Utility of the Internet/Web application?

Price Maintenance

- _____ 1. Does the textbook module include facilities for automatically maintaining prices? It must compute prices based upon user specified parameters. Net-priced and publisher list-priced titles should have different sets of parameters.
- _____ 2. When bibliographic database updates are loaded, does the user have the option of automatically re-computing the store's selling prices to reflect any publisher price changes shown in the update?
- _____ 3. Does the Textbook module calculate a suggested mark-up or markdown when price changes occur in the database based upon perpetual inventory on-hand?

Adoption Forms

- _____ 1. Does the textbook module generate forms to be distributed to faculty or departments for reporting their adoptions. These forms should include a list of previous adoptions for faculty convenience. User should be able to specify which previous term's adoptions are to be printed.
- _____ 2. Can the adoption requisition process be performed electronically by faculty members with the use of the Internet/Web application?

Class Schedules and Enrollment Information

- _____ 1. Does the Textbook Module support entry of class Schedule Information both before and during adoption entry?
- _____ 2. Can Class Schedule Data be downloaded from the school's enrollment system electronically?

- _____ 3. Are facilities provided for interfacing to the campus administrative computer for this purpose?
- _____ 4. Does the Textbook Module support the entry of multiple class enrollment numbers, including; Bookstore's Estimated Enrollment and Actual Enrollment?
- _____ 5. Can enrollment numbers be downloaded from the school's enrollment system electronically?
- _____ 6. Can order quantities be automatically recomputed based upon changes in current enrollment figures?

Adoption Entry

- _____ 1. Can adoption be electronically loaded to the text application from the Internet/Web application after review/audit by the Bookstore eliminating the need to re-key the adoption data?
- _____ 2. If entering adoptions into the system, do users have the option of:
 - _____ -Selecting a title from a bibliographic database, eliminating keying of new title data?
 - _____ -Selecting a title from the store's database of previous adoptions?
 - _____ -Entering the title manually?
 - _____ -Adopting a group of titles from a past course for the current term in a single step?
 - _____ -Flagging a course or section as "No Text"?
- _____ 3. Does the Textbook Module generate a list of adoptions entered for the purposes of proof reading and audit trail?
- _____ 4. Does the Textbook Module track and report courses for which no adoption information has been entered?
- _____ 5. Does the Textbook module allow you to copy course information from one term to another to begin adoptions for a new term?
- _____ 6. Does the Textbook module allow you to copy title information from one course or section to another?
- _____ 7. Can you transfer textbooks between store locations during the adoption process?

_____ 8. Does the adoption process fully support Sets, Course Packs, and Custom Pub?

Trade Books

_____ 1. Does the system provide for tracking and reporting of inventory and sales at all of the following levels for each store?

- _____ By Department
- _____ By Class
- _____ By Category (Subject)
- _____ By SKU

_____ 2. Can these reporting levels be user defined?

_____ 3. Can titles be assigned to a user-defined season, with inventory, purchases and sales for that season tracked as a group?

_____ 4. Can any trade title be flagged as "basic", indicating to the system that it is eligible for automatic replenishment or for the purpose of system suggestions for distribution?

_____ 5. Can orders be assigned to particular buyers, allowing for reporting of buyer performance?

_____ 6. Can a title be copied into another store on the same system?

_____ 7. Does the system support an interface to Bowker Books In Print?

_____ 8. Can citations be searched in BIP and adopted into the trade book system without the need to rekey information?

_____ 9. Can new trade titles can be created manually?

_____ 10. Can a trade title be associated with a distributor for reordering purposes, while retaining the publisher imprint?

_____ 11. Does this application support the new standard ISBN as it will become a thirteen-digit number as of January 1, 2007?

_____ 12. Does the application support Bookland EAN barcode codes for 13-digit ISBN titles?

General Merchandise

- _____ 1. Does the system provide for tracking and reporting of inventory and sales at all of the following levels for each store?
- _____ By Department
 - _____ By Class
 - _____ By Category
 - _____ By SKU
- _____ 2. Can these reporting levels be user defined?
- _____ 3. Can general merchandise allow for tracking and reporting of inventory and sales for each color, size, and imprint associated with a SKU?
- _____ 4. Are the color, size, type scales user definable?
- _____ 5. Can similar SKUs with different colors and sizes be associated in a matrix?
- _____ 6. Can this two-dimensional matrix be user-defined?
- _____ 7. Can SKU's be assigned to a user-defined season, with inventory, purchases and sales for that season tracked as a group?
- _____ 8. Does the system provide for ordering in one unit-of-measure, and selling in another unit-of-measure, with automatic conversion between the two? For example, can items be ordered from vendors in dozens and then sold as each?
- _____ 9. Can these units of measure be user defined?
- _____ 10. Can any item be flagged as "basic", indicating to the system that it is eligible for automatic replenishment or for the purpose of system suggestions for distribution?
- _____ 11. Does the general merchandise function allow some items to be tracked at the SKU level, while others are recorded only at the class, department, or division level?
- _____ 12. Can orders be assigned to particular buyers, allowing for reporting of buyer performance?
- _____ 13. Does the item entry process provide a "copy existing SKU" (item) file information to facilitate the entry process of new SKU's?
- _____ 14. Can a SKU be copied into another store on the same system?

- _____ 15. When creating SKU's can the selling price be determined based upon a user defined default gross margin percent assigned at the classification level?
- _____ 16. Does the general merchandise module provide for the creation of model stocks at the SKU/store level for the use within the ordering, transfer, distribution, and management processes of the application?

Packages

- _____ 1. Packages are groups of items the store assembles for promotion or program-based learning (such as nursing program kits, engineering or math kits, or back-to-school welcome packs). Are package items supported?
- _____ 2. If package items are supported may they contain a mixture of any merchandise type (text, trade or general merchandise)?
- _____ 3. If package items are supported may they multiple units of the same item?
- _____ 4. Can packages be adopted into courses as a learning material?
- _____ 5. When packages are assembled how is inventory affected?
 - _____ Items are relieved upon package creation
 - _____ Items are not relieved upon package creation
 - _____ User selects preferred method as a store parameter
- _____ 6. When packages are sold how is inventory affected?
 - _____ Packages are sold as units
 - _____ Items are relieved individually
 - _____ User selects preferred method as a store parameter

Vendor Maintenance

- _____ 1. Does the vendor database contain:
 - _____ *Sufficient information to efficiently generate orders?*
 - _____ *Summary tables of vendor's discount policies?*
 - _____ *Vendor's returns policies?*
- _____ 2. Is a single vendor database used for all vendors, publishers, distributors, and manufacturers?

- _____ 3. Is a single vendor database shared within all pertinent modules, inventory control and accounting?
- _____ 4. Are separate order, return, return permission and remit addresses for all inventory types (text, trade, GM) supported in a single vendor record?
- _____ 5. Are order minimums (dollars and/or units) maintained in the vendor record?
- _____ 6. Does the vendor database identify a default currency code for the vendor?
- _____ 7. Is each location's account number for the vendor maintained in the vendor record?
- _____ 7. Do default values such as order address, minimum order information and returns policies integrate into the purchasing, invoice reconciliation and returns modules to facilitate data entry?

Purchasing

Textbooks

- _____ 1. Does the Textbook Module provide an "automatic purchase order" function, which is capable of generating orders for all titles with open-to-buy for a given term, or for a given term and publisher or group of publishers?
- _____ 2. Can it generate orders in a "manual mode", which allows users to select specific titles for inclusion in an order?
- _____ 3. Do both automatic and manual purchase order functions allow for automatic batch ordering through both PUBNET and EASYLINK?
- _____ 4. Can "Want Lists" for multiple stores be created at the same time?
- _____ 5. Can "Want Lists" for multiple vendors be set up in user-defined order?
- _____ 6. Can "Want Lists" for multiple wholesalers be cascaded in this user-defined order without the need to re-key quantity or title information?
- _____ 7. Can the Textbook module create purchase orders for multiple stores at the same time?
- _____ 8. Does the system provide the user the ability to send want lists to multiple wholesalers at the same time base on user defined percentage allocation?
- _____ 9. Will the system automatically create a purchase order for want list responses from ALL major wholesalers?

_____ 10. Can the system create a purchase order without an electronic want list response?

Textbook Purchasing Communications

_____ 1. Do all communications from the Textbook Module take place directly from the back-office computer, without the necessity of downloading an intermediate file to another computer before transmission?

_____ 2. Does the Textbook Module support batch transmission of orders through PUBNET, and retrieval of PUBNET acknowledgements?

_____ 3. Does the Textbook Module support automatic order transmission or EASYLINK?

_____ 4. Does the Textbook Module support automatic transmission of want-lists to textbook wholesalers through EASYLINK?

_____ 5. Can the Textbook Module support automated posting of wholesaler want-list replies to order records?

_____ 6. Does your system support the fourteen-digit EAN/UCC-14 (a member of the GTIN, or Global Trade Item Number, family) as the new recommended standard for communication between trading partners?

Textbook Buyback and Sales To Wholesaler

_____ 1. Does the Textbook Module perform an on-line automated buyback?

_____ 2. Does it support four tiers of buyback pricing: Retail Buyback Price (computed as a user supplied percentage of selling price); Special Price (user specified price for books to be bought for store at other than Retail Buyback Price), Speculative Price and Wholesaler's Guide Price?

_____ 3. Can unlisted titles be bought back on the system?

_____ 4. Can an audit trail be maintained for each transaction, if desired?

_____ 5. Do buyback figures automatically post to inventory?

_____ 6. Does the buyback feature allow for entry of books by Author/Title, ISBN or scanned Bookland-EAN?

- _____ 7. Does the system automatically generate an appropriate Bookland-EAN bar code label for all books bought during the buyback (except those purchased at wholesale prices).
- _____ 8. Does the system support selling books to wholesalers? This facility should generate a priced shipping list of books sold.
- _____ 9. Will the application retain and summarize buy back data based upon the previous guide when the user implements new pricing?
- _____ 10. Does the system accept scanning student ID's for tracking and storing of transactions?
- _____ 11. Does the system support printing receipts of transactions?

General Merchandise

- _____ 1. In the General Merchandise purchase order programs, do values associated with the vendor from the vendor file default to the purchase order?
- _____ 2. When purchase orders are created, can the user enter comments or messages for the vendor, receiving department, and accounts payable department? How many characters can the message be?
- _____ 3. When creating a purchase order, if a SKU is not already on file, can it be created from within another window?
- _____ 4. Can items tracked at the SKU level and items recorded only at the class level be ordered on the same purchase order?
- _____ 5. Can items be ordered by color, size, imprint, etc.?
- _____ 6. Can users copy an order for one store to a second store within a purchase order?
- _____ 7. Can the system provide a listing of orders, which are past cancellation date?
- _____ 8. Does it provide purchase order reporting by vendor?
- _____ 9. Can reports on purchase orders be done by the following reporting levels:
 - _____ Department
 - _____ Class/Category
 - _____ SKU (style / title)
 - _____ Buyer
 - _____ Vendor/publisher

- Store/location
- Date range

- 10. Does the purchase order module provide for automatic replenishment of stock based on a model stock plan?
- 11. Does the purchase order module provide for suggested reorder based upon a model stock min-max units approach.
- 12. Does the purchase order function provide for a free form comment line at the line item (SKU) level within the purchase order?
- 13. Can additional comments be entered free form for Receiving and Vendor communication/information? How many characters can these comments be?
- 14. Does the purchase order functionality provide the ability to copy any existing purchase order in the General Merchandise system?
- 15. Can the copied purchase order be maintained base on user requirements:
 - All pertinent dates
 - All comment line
 - All vendor information
 - SKU (item) quantity changes
 - SKU (item) additions
 - SKU (item) deletes
 - Store location additions
 - Store locations deletes
 - Item cost
 - Vendor terms
- 16. Can information for multiple stores be viewed on a single screen?
- 17. Does the purchasing function provide the capability for the user to click on an icon to allow access to any other function within the General Merchandise module (reporting, inquiries, management functions) without leaving the specific purchase order?
- 18. Does the purchase order function provide window capability to key data files while in the entry process without leaving the specific purchase order?
- 19. While in purchase order entry can the user view total line information (dollars/units/gross margin) by store or the entire purchase order with a mouse click?
- 20. Can planned purchases be allocated to any future Open-To-Buy periods?

21. When ordering books, will the system allow the user to order via the following methods:
- By titles adopted to the local Database?
 - By title from the reference Database?
 - For an unlisted title?
22. Will the system allowing selection of the vendor/publisher to order from within the purchase order screen?
23. When creating the order for the title, will the system display all existing purchase orders the title is on with estimated cost to date, the number of units and the number of copies of the title?
24. Does the purchase process for books apply the pertinent discount table for the vendor/ publisher to the title being ordered?
25. Can the user view other valid discount schedules while in the purchase order?
26. Once the order has been placed will the system display:
- The estimated cost?
 - The discount table being used?
 - The number of units using the discount table?
 - The percentage of the discount?
27. Does the purchase order process allow the user to apply special pricing when the vendor has offered “one time only” pricing, or the order is an exception to the normal discount tables?
28. Does the system have an order queue, where titles awaiting order and the associated quantity to be ordered are accumulated?
29. Does the software support defining the default alternate source in the following ways:
- Globally, for all titles on the order?*
 - Title by title?*
30. When a default alternate source is defined, can the user override, and manually enter another alternate source?

31. After items have been accumulated on the order queue, they are then released to be ordered. When building orders in this way, does the General Merchandise/General Book Module:

_____ *Allow user to view and release all titles from a given vendor as a group?*

_____ *Display summary information about the order, such as total value of the order at cost and at retail, number of titles on the order, number of books on the order, and the current status of the open-to-buy?*

_____ *Display summary information about vendor's discount schedules, and the discount, which would be earned if order is placed without modification?*

_____ *Modify quantities to be ordered, and delete titles from the queue?*

_____ 32. Can purchase orders be flagged for communication to the Electronic Data Interchange (EDI) module for electronic communication of the order to the pertinent vendor?

_____ 33. Can this "EDI Flag" be set up as a default in the vendor file indicating the vendor as an EDI partner?

_____ 34. Does the buyer have control of the transmission of the purchase order to the EDI module?

Automatic Order Suggestions

_____ 1. Can the system automatically report average delivery times for each vendor as a moving average, based on past receiving history?

_____ 2. Does the system automatically compute seasonal sales factors for each subject classification?

_____ 3. Does the system automatically track at least twelve months of monthly sales history for each title, plus the current month to date?

_____ 4. Does the system track at least eight weeks of weekly sales history for each title, including the current week to date?

_____ 5. Does the system provide projections of future sales?

_____ 6. Does the system maintain summary data on vendor's discount schedules in the vendor database?

- _____ 7. Does the system suggest reorders, based upon min-max units of supply?
- _____ 8. Can the suggested reorders be reported prior to order generation?
- _____ 9. Can purchase orders be flagged for communication to the Electronic Data Interchange (EDI) module for electronic communication of the order to the pertinent source?
- _____ 10. Can this “EDI Flag” be set up as a default in the vendor file indicating the vendor as an EDI partner?
- _____ 11. Does the buyer have control of the transmission of the purchase order to the EDI module?

Mail Orders and Special Orders

- _____ 1. When taking a special order, does the system warn the user when a title is already in stock?
- _____ 2. When taking a special order, does the system determine if it is already on order for regular stock, and convert that regular order to a special order?
- _____ 3. Does the system provide user defined notices to the customer when special orders are received? The notices should be able to be reprinted indefinitely as long as the order remains open.
- _____ 4. Does the General Merchandise / General Book Module provide reports of special orders which are over-due from the vendor?
- _____ 5. Can purchase orders be flagged for communication to the Electronic Data Interchange (EDI) module for electronic communication of the order to the pertinent source?
- _____ 6. Can this “EDI Flag” be set up as a default in the vendor file indicating the vendor as an EDI trading partner?
- _____ 7. Does the buyer have control of the transmission of the purchase order to the EDI module?

Shipping/Receiving

- _____ 1. Is there a function to log all shipments as they are physically received on the shipping dock?

Textbooks

- _____ 1. Is there a price verification feature provided in the system that allows for the scanning of product to confirm:

- _____ Valid SKU/UPC number on the system
- _____ Current Retail Price
- _____ Product description/title
- _____ Author
- _____ Subject
- _____ Book Number
- _____ Classification assignment

- _____ 2. Is the textbook module fully integrated into Accounts Payable, and the inventory valuation functions?
- _____ 3. During receiving, does the system allow the option to automatically calculate (and re-calculate) the selling price based upon user supplied pricing rules?
- _____ 4. Does the Textbook Module support receiving by ISBN, receiving by Author, and receiving by Title?
- _____ 5. Does Textbook receiving automatically generate Bookland-EAN bar codes for titles that are not vendor bar-coded?
- _____ 6. Does Textbook receiving automatically generate bar code labels that identify used books that are received?
- _____ 7. Does the Textbook module provide a receiving document, functionality for a full audit trail pertaining to the receiving and accounting activities?

General Merchandise

1. Is there a price verification feature provided in the system that allows for the scanning of product to confirm:

- _____ Valid SKU/UPC number on the system
- _____ Current Retail Price
- _____ Product description/title
- _____ Author
- _____ Subject

- _____ Book Number
- _____ Classification assignment

- _____ 2. Does the system provide for freight-pass-through pricing?
- _____ 3. Does the system provide automatic generation of Bookland-EAN labels for titles received without vendor marked bar-codes?
- _____ 4. Is the receiving function fully integrated to the Electronic Data Interchange (EDI) module?
- _____ 5. Will the EDI module communicate the electronically received Advanced Ship Notices (ASN's) and / or invoices from Vendor/Supplier partners?
- _____ 6. Can the ASN's and/or invoices be tied to receiving documents once received?
- _____ 7. Can the ASN's and/or invoices tied to documents be electronically fed to the Accounts Payable module?
- _____ 8. Will the EDI module communicate the following ASN and or invoice data received from the vendor electronically to the receiving function:
 - _____ Date Shipped
 - _____ Shipment reference number
 - _____ Number of Aartons
 - _____ Invoice date
 - _____ Due Date
 - _____ Item
 - _____ Cost
 - _____ Quantity
 - _____ Terms/discounts
 - _____ Totals
- _____ 9. Will the system generate a hard-copy receiving worksheet?
- _____ 10. Will the system assign a receiving number for the purposes of tracking, and to insure that all paperwork is accounted for?
- _____ 11. Will the receiving process allow the entry/tracking of:
 - _____ Purchase Order numbers
 - _____ Date Received
 - _____ Store
 - _____ Vendor
 - _____ Received by
 - _____ Receiving method
 - _____ Collect Freight (Yes or No)

- _____ Month/year to post
- _____ Shipper ID number
- _____ Waybill number
- _____ Shipping amount
- _____ Cartons on shipment
- _____ Carton weight
- _____ Free Form Notes Field of 4,000 characters (alphanumeric)
- _____ Vendor order number

- _____ 12. Can existing receiving document be easily displayed?
- _____ 13. Can receiving worksheets be printed?
- _____ 14. Are barcodes be printed on the worksheet to facilitate entry by scanner?
- _____ 15. Can multiple purchase orders be added/assigned to a single receiving?
- _____ 16. Can purchase orders be deleted from a receiving document?
- _____ 17. Can unordered merchandise be received into the system through the regular receiving programs?
- _____ 18. Does the receiving program allow exceptions to be noted? Some examples of exceptions would be shortages, damages, cancellations, etc.
- _____ 19. When exceptions are noted, is the information automatically passed to Accounts Payable for generation of a credit request?
- _____ 20. Is there a system defined field in the item receiving record to indicate/communicate "More Receipts Expected"?
- _____ 21. Is there a system defined field in the item invoice record to indicate/communicate "Excluded From Quantity To Pay"?
- _____ 22. Is there a system defined field in the item receiving record to indicate/communicate "Quantity to Return"?
- _____ 23. Is there a free form notes feature to add written notes to receiving exceptions?
- _____ 24. Does the receiving feature allow for the update of cost and retail prices while receiving?
- _____ 25. When editing the cost and retail prices in receiving will the system automatically create a pending price change for communication to the Point of Sale system?

___ 26. Can the user elect to receive an entire purchase order by simply indicating there are no exceptions?

Returns to Vendor

___ 1. Does the system provide for an *automatic returns* feature, which will suggest return of excess stock, and slow moving items/titles?

___ 2. Does the Automatic Return Process allow for selecting items/titles to extract based upon the following global selection criteria:

- ___ Length of item/title ownership by store
- ___ Invoice Date
- ___ Items/titles with no sales
- ___ User defined dates

___ 3. Once the global selection criteria has been made, can the user further define their returns extract selection by the following:

- ___ Vendor/Publisher
- ___ Department
- ___ Subject
- ___ Class
- ___ Category
- ___ Store/location

___ 4. Does the system allow for a *manual returns* function, allowing user to manually select items/titles for return?

___ 5. Does the manual return process provide an online listing of all invoices for the specific item/title selected for purpose of selecting the invoice to return against?

___ 6. Will the returns process create permission letters for pertinent Vendors/Publishers?

___ 7. Are the permission letters user definable and can the user perform edits?

___ 8. Will the return process create a picking document for the store to utilize in pulling return item/title quantities?

___ 9. Can the user edit the exact item /title picked for return and the quantity picked?

___ 10. Once the return quantity is confirmed is the inventory system for stock ledger updated automatically?

- 11. Is the update to the stock ledger immediate upon confirming/posting the return?
- 12. Is a credit request/packing slip created for documentation concerning the return for the Vendor/Publisher?
- 13. Can the user apply user defined reason codes to the credit request created for communication to the vendor?
- 14. Will the system automatically communicate the processed return document (credit memo) to the Accounts Payable System?
- 15. Will the processed return document (credit memo) be held in a pending file in the inventory control application awaiting confirming Vendor/Publisher documentation?
- 16. Can the user edit the credit memo in the inventory control application in order to match or reconcile to the Vendor/Publisher documentation?
- 17. Can the user update the Vendor/Publisher account with the credit memo once approved?
- 18. Will the update of the posted credit memo be applied against the open payables for the Vendor/Publisher?
- 19. Will the updated of the posted credit memo to the Vendor/Publisher account place the account in a debit balance if necessary?

Stock Ledger

- 1. Does the system support a stock ledger module?
- 2. Does the stock ledger provide for reporting at the following levels:
 - By Store
 - By Department
 - By Class
 - By Category
 - By General Ledger Code
 - By Period (month or range of months)
 - For Current Sales Month at Cost
 - For Current Sales Month at Retail
 - For Current Fiscal Year at Cost
 - For Current Fiscal Year at Retail
- 3. Does the stock ledger provide for the following reporting elements:
 - Beginning Balance

- ___ Purchases
- ___ Purchase Accruals
- ___ Purchase Discounts
- ___ Returns
- ___ Returns Gain or Loss
- ___ Returns Accruals
- ___ Returns Accruals Gain or Loss
- ___ Denied Returns
- ___ Commissions
- ___ Commissions Accruals
- ___ Purchase Fees
- ___ Purchase Credits
- ___ Penalties
- ___ Markups
- ___ DCC Transfers
- ___ Count Adjustments
- ___ Store Use
- ___ Other Adjustments (theft, donation, etc.)
- ___ Markdowns
- ___ Outstanding Credit Requests
- ___ Received Not Invoiced
- ___ Inventory Variance
- ___ Sales
- ___ Sales Returns
- ___ Sales Discounts
- ___ DCC Sales
- ___ By Class
- ___ By Category
- ___ By Period (month or range of months)

- ___ 4. Can supporting detail reports of each of the above elements be viewed or printed on demand for audit and balance?

Physical Inventory

- ___ 1. Does the system support taking physical inventory at a variety of levels, including store, division, department, class, SKU?
- ___ 2. Can it automatically calculate the cost of this inventory?
- ___ 3. Is cost calculated using FIFO or Weighted Moving Average inventory valuation methods?
- ___ 4. Is physical inventory using portable terminals and hand-held scanners supported?

- ___ 5. Is physical inventory using wireless hand-held scanner terminals supported?
- ___ 6. Can specific merchandise categories be frozen to allow for cycle counting of inventory?
- ___ 7. Are reports for Items Not Scanned available?
- ___ 8. Are reports available for Items Not Found if using the portable terminals that communicate in batch mode?
- ___ 9. Are reports by store fixture available?
- ___ 10. Are reports by item/SKU available?
- ___ 11. Are reports by merchandise classification/DCC available?

Accounting System

Accounts Payable

The Accounts Payable module must be a highly flexible application designed to evaluate and forecast cash needs and requirements, analyze expenditures, and assess vendor activity. The Accounts Payable module must be fully integrated with the purchasing, receiving, and returns functions of each perpetual inventory application proposed. The application must automatically compare and validate vendor invoices with product receipts, assuring shrinkage control. Upon user's control, the Accounts Payable module should be able to print the appropriate journals, and automatically distribute the transactions to the appropriate general ledger account number. The application must support multiple company and store locations established on the system. The application must be fully integrated to the Electronic Data Interchange (EDI) module.

The Accounts Payable application must be capable of interfacing to the campus host system via a "Gateway" style application.

- ___ 1. Is the Accounts Payable Module fully integrated with the General Ledger module?
- ___ 2. Is the Accounts Payable Module fully integrated with all the following inventory control modules?
 - a). Textbook module
 - b). General Merchandise module
 - c). General/Trade Book module

- 3. Is the Accounts Payable Module fully integrated to the Electronic Data Interchange (EDI) Module for electronic receipt of the vendor/supplier invoice?
- 4. Does it assign a voucher numbers for tracking documents?
- 5. Does the A/P Module provide an automated method for auditing receiving records against invoices?
- 6. Does it allow for recording of discount at the invoice and the line item level?
- 7. Can an invoice be paid by scheduling multiple partial payments?
- 8. When entering invoices, can the system automatically generate any necessary debit or credit memos?
- 9. Can merchandise which has not been ordered or received through one of the inventory control modules be booked and paid for through A/P.
- 10. When entering expense invoices, can it be booked to multiple stores?
- 11. Will the system support recurring invoice entry with posting to multiple periods?
- 12. Can invoices be selected for payment by our institution's Accounts Payable system?
- 13. Are facilities provided for transmitting Accounts Payable data to the institutions mainframe?
- 14. Does the A/P System handle pre-paid invoices?
- 15. Can a trial balance for accounts payable be generated on closed periods?
- 16. Does the system allow for detailed inquiry and reporting by vendor and by invoice?
- 17. Can the Accounts Payable module support a flexible method of selecting invoices to pay including the following selection parameters:
 - Merchandise only
 - Expense only
 - Both merchandise and expense
 - Select by Key Number (invoice)
 - Select vendor due date

_____ All vendors by due date

- _____ 18. Does the application allow for the exclusion of selected invoices?
- _____ 19. Does the application allow for the exclusion of selected vendors?
- _____ 20. Does the Accounts Payable application handle fractional cents?
- _____ 21. Does the Accounts Payable application accommodate the use of billing factors - order from one vendor, pay another?
- _____ 22. Does the Accounts Payable application allow the creation of a “one time” vendor during invoice entry for capture of name and address for check production?
- _____ 23. Does the Accounts Payable module automatically pull in the appropriate General Ledger account number when processing?
- _____ 24. Does the Accounts Payable module provide the capability to adjust posted (updated) invoices without re-entry to reverse?
- _____ 25. Can this application support up to 999 companies (enterprises)?
- _____ 26. Will the system automatically communicate the processed return document (debit memo) from the Text and General Merchandise/General Book modules to the Accounts Payable System.
- _____ 27. Will the processed return document (debit memo) be held in a pending file in the Accounts Payable application awaiting confirming Vendor/Publisher documentation.
- _____ 28. Can the user edit the debit memo in the Accounts Payable application in order to match or reconcile to the Vendor/Publisher documentation?
- _____ 29. Can the user update the Vendor/Publisher account with the debit memo once approved?
- _____ 30. Will the update of the confirmed debit memo be applied against the open payables for the Vendor/Publisher?
- _____ 31. Will the updated of the confirmed debit memo to the Vendor/Publisher account place the account in a debit balance if necessary?

Accounts Receivable

The Accounts Receivable module must provide a fully functional revolving charge and/or open item tracking system. Average daily balances and other common finance calculations must be supported, along with flexible minimum payment calculations.

- _____ 1. Is the Accounts Receivable Module fully integrated with the Point-of-Sale System?
- _____ 2. Is the Accounts Receivable Module fully integrated with the General Ledger Module?
- _____ 3. Can A/R automatically post receivables transactions (invoices and payments) from the POS System, with full audit trails?
- _____ 4. Can the Receivables Module generate credit authorization files for the POS System, including credit limits?
- _____ 5. Does the A/R Module support:
 - Open Item Accounts?*
 - Balance Forward Accounts?*
 - Multiple Billing Cycles?*
- _____ 6. Does the A/R Module generate a detailed aged trial balance?
- _____ 7. For accounts, which are in collection, are payments received flagged and reported?
- _____ 8. Application must support a multi store environment for full perpetual inventory management. Does this application support up to 999 separate store locations?
- _____ 9. Does the application support account grouping codes for billing or report purposes?
- _____ 10. Will the application allow the user to select invoice statement printing by store location?
- _____ 11. Can Accounts Receivable management reporting be run by store location?
- _____ 12. Will the application support account balances of \$9,999,999.00?

Financial Aid

The Student Financial Aid module should be a comprehensive application allowing the Bookstore and Business Office to easily manage this process. The application must provide for the automatic tracking of detail student purchases by classification against multiple grant types with real time updates to the pertinent balances. Interfaces to the campus host system/application should be available.

- _____ 1. Is the Student Financial Aid module completely integrated to the point-of-sale cash register system in a real time bases from the host CPU in the Bookstore system?
- _____ 2. Does the real time interface provide an immediate account verification and update to the pertinent student account/grant type?
- _____ 3. Does the system provide full inquiry to the student account from the point-of-sale device?
- _____ 4. Will the account inquiry provide a receipt directly from the Point of Sale terminal for the student?
- _____ 5. Will the account inquiry receipt include:
 - _____ Student Name
 - _____ Account balance for each individual aid/grant assigned to the student
- _____ 6. Does the point-of-sale cash register system provide split tender capable routines involving Student Financial Aid?
- _____ 7. Does the system provide for Student Financial Aid account verification at the point-of-sale cash register devices?
- _____ 8. Does the system provide a detailed purchase record for student financial aid transactions?
- _____ 9. Does the system allow for the assignment of multiple types of aid (grants) per student?
- _____ 10. Can the specific Student Financial Aid type (grant) be prioritized by the system for use within the Bookstore?
- _____ 11. Does the Student Financial Aid module provide for date sensitive parameters set by specific Aid/Grant?
- _____ 12. Does the point-of-sale system provide for line item authorization?
- _____ 13. Does the Student Financial Aid module perform settlements by student account/aid type?

- _____ 14. Does the Student Financial Aid system credit returns processed by the point-of-sale system automatically to the students account in a real time update?
- _____ 15. Does the point-of-sale system and Student Financial Aid module provide for complete audit trails?
- _____ 16. Does the Student Financial Aid module provide for full management reporting with detail purchase activity by student account and/or aid type?
- _____ 17. Does the point-of-sale system produce a receipt indicating the exact amount applied against the student's aid by each specific aid type?
 - _____ a). Does the receipt include a summary of the student's current balance for each pertinent aid type as of this very last transaction for their records?
- _____ 18. Does the Student Financial Aid module support a multiple store environment?
 - _____ a). When processing a Student Financial Aid transaction, does the real time update to the student record become available for all point-of-sale registers and all store locations immediately?
- _____ 19. Is the Student Financial Aid application fully integrated to the accounts Receivable application?
- _____ 20. Is the Student Financial Aid application a module separate from the accounts Receivable application?

General Ledger

The General Ledger module should interface to the proposed Accounts Payable, and Sales Audit modules to provide a complete accounting of all financial transactions. The application should enable the user to format their own financial reports with flexible selection parameters.

- _____ 1. How many companies (enterprises) can this application support?
- _____ 2. Application must support a multi store environment for full perpetual inventory management.
- _____ 3. Does the G/L Module support SJE (standard journal entry)?
- _____ 4. Does the G/L Module support RJE (recurring journal entry)?
- _____ 5. Is this a voucher based system?
- _____ 6. Does it provide comparative reporting?

- _____ 7. Does it support budget?
- _____ 8. Can closed periods be reopened?
- _____ 9. Does G/L produce trial balance reports?
- _____ 10. Does it insure that all entries are in balance?
- _____ 11. Can all reports, including Profit/Loss (Net Revenue), Balance Sheets, etc. be completely user defined?
- _____ 12. Does your G/L Module include a report generator?
- _____ 13. Does the G/L module accommodate having multiple periods/years open for processing at the same time?
- _____ 14. Does the G/L module support Budget, Current Year, Prior Year and Previous Year data for comparative reporting purposes?
- _____ 15. Does the G/L module support recurring journal entries?
- _____ 16. Can periods previously closed be reopened for processing?

Point Of Sale System

Central Control

- _____ 1. Does the application software allow for control of all POS terminals from a single, central, store controller?
- _____ 2. Does the application software provide menu-driven operation at the central store controller?
- _____ 3. Does the POS application provide for Electronic Journal of all detail transaction data?
- _____ 4. Does the Electronic Journal feature provide a “search engine” for transaction data look up?
- _____ 5. Does the search engine allow the look up based on elements in the detail transaction including:
 - _____ Store location
 - _____ POS Terminal
 - _____ Student ID number

- Credit Card number
- Debit Card number
- Transaction number
- Item
- Date/Time

- 6. Does the application allow the user to archive the Electronic Journal on diskette or tape media?
- 7. Does the Electronic Journal allow the user to print full detail journals if desired?
- 8. Does the detail journal print routine allow the user to print for :
 - All POS terminals
 - Selected POS terminals
- 9. Is the detail journal print done on the POS Controller printer in a back office environment eliminating the need to perform the print on the individual POS terminals?

Price-Look-Up File Maintenance

- 1. Can the Price-Look-Up file be automatically generated by the back-office system, and then transmitted electronically to the POS System?
- 2. Is the process of updating the PLU file on the POS system completely menu driven from the back-office computer?
- 3. Can the store controller accept updates to the Price-Look-Up file from the back-office computer at any time during the day, with no interruption of transaction processing by the terminals?
- 4. Can the update be set to run automatically for real time inventory, i.e. every 90 seconds.

System Personalization

- 1. Does the POS Application allow the user to place up to 6 lines of information on the receipt header?
- 2. Can the user define the location and function of all key buttons on the POS terminal keyboard (with the exception of the ten-key pad)?
- 3. Can the user define which transaction types are to be allowed?

- _____ 4. Can the user define which tender types are to be allowed?
- _____ 5. Can the key board customization of transactions and tenders be defined for all terminals, a single terminal, or a group of terminals?
- _____ 6. Can cashiers be required to have a supervisor key inserted or password typed for certain user specified types of transactions?

Password Security

- _____ 1. Is password security provided for cashiers, supervisors, and the system operator?
- _____ 2. Can a password profile be set up to limit the transactions, which a cashier is able to perform.
- _____ 3. Can these password profiles be set up for all cashiers, a single cashier, or a group of cashiers?

Till Control

Till control refers to the facilities and procedures by which cash and other tender are tracked and audited.

- _____ 1. As tender is removed from a till during the day, can it be recorded?
- _____ 2. When checks are removed from the till during the day, can an itemized listing be produced?
- _____ 3. At the end of the shift, can the ending counts of tender in the till be counted into the system?
- _____ 4. Can the tender management routines be performed through the store controller?
- _____ 5. Can the tender management routines be performed from the terminal for which the information is being recorded?
- _____ 6. Can a report be generated, summarizing the activity performed by the cashier, and showing the amount over/short?
- _____ 7. Does the application provide for a full functioning Bad check feature including:

- _____ *-Aged trail balance reporting for bad check?*
- _____ *-The ability to designate an acceptable check amount by student (customer) ID number?*
- _____ *-The ability to designate an acceptable maximum amount by student (customer) ID?*
- _____ *-The ability to produce a complete bad check listing?*
- _____ *-The ability to accept feeds from campus host systems to update the Bad check feature?*

Transaction Logging

- _____ 1. Does the POS system maintain a complete and detailed log of each transaction in a file on the store controller for later processing by the back office system?
- _____ 2. In the event that the transaction file is not polled by the back office system for several days, can the store controller retain several days’ transactions? Each day's transactions should be retained in a separate file.

Tender Activity

- _____ 1. How many different valid tender types can the user assign?
- _____ 2. Can each tender type assigned be utilized in a single sales transaction?
- _____ 3. When the Student Financial Aid application is installed, will the following functionality be provided by the Point of Sale system:
 - _____ *Is the Student Financial Aid module completely integrated to the point-of-sale cash register system in a real time basis from the host CPU in the Bookstore system?*
 - _____ *Does the real time interface provide an immediate account verification and update to the pertinent student account/grant type?*
 - _____ *Does the system provide full inquiry to the student account from the point-of-sale device?*
 - _____ *Can the account inquiry provide a receipt directly from the Point-of-Sale terminal for the student?*
 - _____ *Does the point-of-sale cash register system provide split tender capable routines involving Student Financial Aid?*

- _____ *Will the system split tender between multiple type of aid/grants per student in a single sales transaction?*
- _____ *Will the system split tender between Student Financial Aid aid/grants with all other valid forms of tender established in a single transaction?*
- _____ *Does the system provide for Student Financial Aid account verification at the point-of-sale cash register devices?*
- _____ *Does the system provide a detailed purchase record for student financial aid transactions?*
- _____ 4. Will the system support the assignment of “non merchandise” transactions codes for tendering of non merchandise items such as cap and gown rental, transit tickets, stamps, locker rental, etc.?
- _____ 5. Will this assignment of non merchandise codes provide detail tracking of this sales activity?
- _____ 6. Will the system support the ability to enter a code during a transaction to represent a user defined activity (such as lab fee)?
- _____ 7. Does the system provide for the ability to handle gift certificates?
- _____ 8. Does the system allow for input of a gift certificate number for redemption?
- _____ 9. Will the system prompt for expiration date of the gift certificate being redeemed?
- _____ 10. Upon purchase of a gift certificate/due bill will the system update the data file with gift certificate/due bill number, redemption date, and amount?
- _____ 11. Can the system handle foreign currency transactions and track for balancing purposes?
- _____ 12. Will the system endorse the back of the check for deposit purposes in the insert/impact printer on each POS terminal?
- _____ 13. Will the system accept check over the amount tendered with the appropriate change being calculated by the POS terminal?

Bank Card Credit Authorization

- _____ 1. Is the POS system capable of processing bank-card credit authorization automatically over the Internet or a telephone line?
- _____ 2. Does the system queue credit authorization requests through the store controller, allowing the use of fewer telephone lines, and improving throughput?
- _____ 3. Does the application accept credit card data scanned through a magnetic stripe reader?
- _____ 4. Does the application automatically produce itemized invoices for customer signature using the POS terminal's standard printer?
- _____ 5. Is electronic draft capture supported?
- _____ 6. Are the following Similar credit card clearing houses supported by the proposed system:
 - _____ Visanet/Vital/TSYS
 - _____ First Data Resources
 - _____ Elavon (formerly Nova)
 - _____ other(please specify)

Special Functions for Processing Books

- _____ 1. Does the system support the full Bookland-EAN standard, including the suffix?
- _____ 2. Do the scanners proposed reliably read the full Bookland-EAN bar code, including suffix?
- _____ 3. Does the system differentiate between the Bookland-EAN bar code between new and used textbook records, and general book records?
- _____ 4. When scanning textbooks, can the POS application discriminate between new and used copies, and price the sale accordingly?
- _____ 5. Do the receipt and detail tapes show the SKU, author, short title, and merchandise classification?
- _____ 6. Can textbook items be rung up by manually keying in the ISBN, and new or used condition indicated by selecting the title from a list?
- _____ 7. Does the detailed transaction log record new versus used sales of textbooks, so that perpetual inventories can be relieved accordingly?

_____ 8. Is the system adaptable to accept proposed changes to the ISBN and Bookland-EAN?

Functions for Processing Non-Book Items

- _____ 1. Are items with vendor source-marked UPC bar codes read by the POS system?
- _____ 2. The POS should not require the application of any special bar codes to items, which are already vendor marked. Does your bid meet this requirement?
- _____ 3. Can fees be attached to items sold automatically for example EMV or CRV fees?

Point-of-Sale Interface

The total system proposed must provide for a seamless interface between the point-of-sale and inventory/financial modules. The process must operate in an unattended environment supporting full edits and controls.

- _____ 1. Does the POS interface provide for a user definable schedule/ calendar for the integration?
- _____ 2. Does the interface provide for a full interface/integration to the inventory modules:
 - _____ Inventory Control System?
 - _____ Accounts Receivable Module?
 - _____ General Ledger Module?
- _____ 3. Does the POS Interface provide for a full interface/integration to the financial modules:
 - _____ Sales Audit/General Ledger?
 - _____ Accounts Receivable?
- _____ 4. Does the POS interface provide for the automatic update to price look up files for:

- _____ Item/SKU price changes?
 - _____ Item/SKU adds?
 - _____ Item/SKU description changes?
- _____ 5. Can PLU updates be sent to the POS terminals at any time during or after business hours and cause no interruption to the ringing of sales?
- _____ 6. Can PLU update be sent to the POS terminals automatically? i.e.: every 90 seconds

Reporting

- _____ 1. Does the POS module provide for flexible user driven reporting including:
- _____ a). Sales Summary report by register/day?
 - _____ b). Sales summary report by store/day with user selected dates?
 - _____ c). Sales summary report by store/month?
 - _____ d). Paid out report by store/day?
 - _____ e). Sales report by store/day?
- _____ 2. Does the POS system support multiple fee/non-merchandise-type collection from the POS system and automatic GL account number assignment for each fee type?
- _____ 3. Does the system provide a report of cashier productivity?
- _____ 4. Does the system provide a report of the volume of business done, by hour of the day?
- _____ 5. Does the system provide a department report for reporting sales, returns, discounts, and allowance data?

Provide samples of the reports your POS system provides.

Internet/Web Applications

The Vendor's solution is to include an Internet/Web application supporting basic Bookstore static pages and faculty adoption, student textbook shopping and student book reservation. The application must be fully integrated to the Vendors inventory management applications. The Bookstore must be allowed control of data/information presented to the Web page for use by its shoppers. The application must be designed for the Bookstore environment with the ability for novice users to operate effectively and

also allow advanced customization tools such as Microsoft Expressions Web, an HTML editor, for further customization.

General Functions

- _____ 1. Does the web application fully support the import of data from the college registrar system including term, course, section and instructor?
- _____ 2. Does the application support student inquiry through entry of Courses or registrar interface and generate on the student computer a shopping list of all textbooks and materials being used the courses selected?
- _____ 3. Does the Web site include a home page, shopping pages and any number of linked static pages?
- _____ 4. Does the application allow the user to customize these informational pages?
- _____ 5. Does the application allow the user to scan in pictures/diagrams to these pages?
- _____ 6. Are the narratives and graphics on the static pages customizable?

Web CPU/Server Requirements

- _____ 1. Are we responsible for hardware upgrades to the web server?
- _____ 2. Are we responsible for operating system or database software upgrades to the web server?
- _____ 3. Is the server protected against failure? Please explain.
- _____ 4. Are load balancing techniques used to maximize server performance?
- _____ 5. Is TCP/IP integrated to the operating system of the proposed CPU/Server?

Faculty Adoption via Web

- _____ 1. Does the application provide for faculty member sign on and password security controlled by the Bookstore?
- _____ 2. Does the Bookstore control all data/history available for viewing through the Administrative Utilities function?
- _____ 3. When confirming information, can the faculty member easily communicate:
 - _____ New course number

- New section number(s)
 New instructor's name
4. Can the faculty member search for text information on the Web database by:
 - ISBN
 - Author
 - Title
5. Does the application provide for manual adoption entry by the faculty member?
6. Does the manual entry process allow the faculty member to enter:
 - Course
 - Section
 - Instructor
 - Author
 - Title
 - ISBN
 - Publisher
 - Edition
 - Statement of Use (required, recommended or optional)
7. Is there a comment section available in the manual entry page for free form comments to allow the faculty member to communicate information to the Bookstore?
8. Can the faculty member copy their adoptions at any time during the process?
 From a previous term?
 From the same term?
9. Can the faculty member edit their adoptions at any time during the process?
10. Does the application flag adoption criteria for the Bookstore indicating method of faculty adoption by:
 - Adoption with use of history
 - Adoption with use of Web Database
 - Manual Adoption
11. Can the faculty member indicate they desire Bookstore contact concerning their adoption request?
12. Can the faculty member print their own receipt of their adoption request?

- ___ 13. Does the Bookstore control the adoption request submitted with the ability to edit?
- ___ 14. Upon approval of the adoption request can the adoption be communicated electronically to the text management application eliminating the need to re-key the adoption?

Student Textbook Inquiry via Web

- ___ 1. Does the application provide the facility of allowing students to inquire on textbooks being utilized in their courses?
- ___ 2. Does the Bookstore have complete control over the data made available to the Web database for student inquiry (such as ISBN or edition) through the Administrative Utilities of the Web/Internet application?
- ___ 3. Does the inquiry feature provide the ability for the student to view information by selecting on screen by each of the following:
 - ___ Valid Term(s)
 - ___ Valid Department(s)
 - ___ Unique ID # (Course Request Number or Course ID)
- ___ 4. Do the term and department fields have pull down windows allowing the student to select the pertinent term and department they are beginning their inquiry with?
- ___ 5. Will the inquiry feature provide a valid listing of the following information for the pertinent term/course selected by the student:
 - ___ Course(s)
 - ___ Section(s)
 - ___ Instructor
- ___ 6. Can the student select the course/section(s) they wish to view textbook information on by simply clicking on the pertinent line on this inquiry page?
- ___ 7. Does the detail inquiry on textbook titles for each course section selected include:
 - ___ Author
 - ___ Title
 - ___ Statement of Use
 - ___ New Price

___ Used Price

- ___ 8. Can the student add textbooks to their “book list” by simply checking (clicking) on a line(s)?
- ___ 9. Can the student specify only REQUIRED textbooks to their “book list” by simply checking (clicking) on a line(s)?
- ___ 10. Can the student specify all USED or all NEW textbooks to their “book list” by simply checking (clicking) on a line(s)?
- ___ 11. Can the student simply return to the search process and continue to add books to their “book list”?
- ___ 12. Can the student simply add or remove textbooks from their “book list”?
- ___ 13. Can the student print their “book list”?
- ___ 14. Will the printed book list contain as a minimum the following information:
- ___ Term(s)
 - ___ Department(s)
 - ___ Course(s)
 - ___ Section(s)
 - ___ Instructor(s)
 - ___ Unique ID #
 - ___ Author(s)
 - ___ Title(s)
 - ___ Statement of Use (by title)
 - ___ Selling Price
- ___ 15. Is a facility available that allows the student to input their ID number and the system will generate all adopted materials for the courses they have registered, provided an interface to the registration system is in place?
- ___ 16. If registration data is made available to the vendor’s system, is a real-time query supported?

Student Textbook Purchasing via Web

- ___ 1. Does the application provide the ability for students to purchase textbooks with SSL protection?
- ___ 2. Does the Administrative Utility of the Web/Internet application provide the ability for the Bookstore to control all data being made available for viewing/printing in the purchasing process?

- ___ 3. Does the inquiry feature for purchasing textbooks provide the ability for the student to view information by selecting on screen:
- ___ Valid Term(s)
 - ___ Valid Department(s)
 - ___ Unique ID #
- ___ 4. Do the term and department fields have pull down windows allowing the student to select the pertinent term and department they are beginning their selection process with?
- ___ 5. Will the inquiry feature provide a valid listing of the following information for the pertinent term/course selected by the student:
- ___ Course(s)
 - ___ Section(s)
 - ___ Instructor
 - ___ Section or Course Request ID #
- ___ 6. Can the student select the course/section(s) they wish to view textbook information on by simply clicking on the pertinent line on this selection inquiry page?
- ___ 7. Does the detail selection inquiry on textbook titles for each course section selected include:
- ___ Author
 - ___ Title
 - ___ Statement of Use
 - ___ New Price
 - ___ Used Price
- ___ 8. Can the student add textbooks to their “shopping cart” by simply building their course listing and clicking on a “purchase books” button?
- ___ 9. Can the student simply return to the search process and continue to add courses and books to their order list?
- ___ 10. Can the student simply add or remove textbooks from their “book orders list” prior to checkout?
- ___ 11. Can the student request Textbook preference of new or used?
- ___ 12. Does the order confirmation page contain the following information:
- ___ Student Order number
 - ___ Order delivery location
 - ___ Student First/Last Name
 - ___ Student Account (ID) Number
 - ___ Address Line 1
 - ___ Address line 2
 - ___ City
 - ___ State/Postal Code
 - ___ Telephone Number
 - ___ Email Address
 - ___ Textbook Preference (by title)
 - ___ Author

- Title
- New Price
- Used Price
- Applicable Sales Tax
- Applicable Shipping Charges
- Order Total Amount

13. Is there a notes field available for the shopper to place special instructions on the Textbook Reservation Order/Reserve page?

14. Can the student print a receipt for their records with the following information:

- Order number
- Student First/Last Name
- Shopper Account (ID) Number
- Address Line 1
- Address line 2
- City
- State/Postal code
- Telephone Number
- Email Address
- Textbook Preference
- Author
- Title
- New Price (as indicated in preference)
- Used Price (as indicated in preference)
- Applicable Sales Tax
- Applicable Shipping Charges
- Order Total Amount
- Bookstore notes field for instructions/advertisements

15. Does the application organize and produce pick list for the Bookstore to work the textbook orders?

16. Does the application allow the Bookstore to view/print student textbook orders by:

- Date
- Alphabetically by student name
- Student Account Number

17. Can the Bookstore edit submitted student textbook orders?

18. Can the Bookstore cancel submitted student textbook orders?

19. Does the application edit new reservations against all submitted entries to ensure duplicate reservations are not created?

20. Does the application provide for the printing of credit card tender with only the last four digits shown to protect the customers account information?

21. Can the order checkout be processed without the need to use a POS terminal?

22. Does the application allow for unrestricted ordering of textbooks regardless of inventory status to prevent lost sales?

eCommerce

The eCommerce application should provide a complete integrated solution from catalog and storefront creation to payment process and fulfillment.. The application must provide for Secure Socket Layer (SSL) for encryption of credit card transactions. The eCommerce application should be fully integrated to the Vendor's host inventory and financial management applications for sales posting, sales history, perpetual inventory and stock ledger.

General

- _____ 1. Can the site be customized using an HTML editor such as Microsoft Expressions Web to allow it to more closely resemble the institution's site?
- _____ 2. Does the application support Secure Socket Layer (SSL)?
- _____ 3. Is the eCommerce application fully integrated to the Vendor's host inventory and financial management applications within the mail order module (please answer "yes" or "no" to each):
 - _____ Sales posting
 - _____ Sales history
 - _____ Item/Book master
 - _____ Perpetual inventory
 - _____ Stock ledger

Integration

- _____ 1. Does the application provide for Application Programming Interface (API) functions to the vendor's host inventory, financial, and customer master application?
- _____ 2. Does the application include functions that manage the shopping task automatically including (please answer "yes" or "no" to each):
 - _____ Manage customer registration and electronic address book
 - _____ Track orders
 - _____ Calculate prices and total costs
 - _____ Calculate taxes
 - _____ Offer discounts
 - _____ Calculate shipping charges
 - _____ Validate payment information
- _____ 3. Does the application provide for full integration of the sales posting routines to the Vendor's host sales and inventory management applications, therefore

eliminating the need to re-key any sale transactions into the host system by using the mail order module?

Customer Service

- ___ 1. Does the application provide the capability to lead customers to specific catalogs targeted to their shopping group?
- ___ 2. Can product pricing be specific for each catalog established?
- ___ 3. Can access to specific catalogs be password driven?
- ___ 4. Can the customer easily search the entire site by whatever criteria the Bookstore specifies (example: name, department, description, price range)?
- ___ 5. Can the customer click, browse and follow logical paths to various items via the indexing the Bookstore establishes?
- ___ 6. Does the application provide for intelligent searching parameters to allow customers to quickly narrow their search for products?
- ___ 7. Can customers go in and out of the different selection process without loss of accumulated information?
- ___ 8. Does the order form automatically calculate price total, including shipping and tax?
- ___ 9. Does the order form show shipping and tax as separate line items?
- 10. Does the application allow the customer to select the pertinent shipping methods established by the user including (please answer “yes” or “no” to each):
 - ___ Pick Up
 - ___ Courier
 - ___ Parcel Post
 - ___ Express Post
- ___ 11. To finalize the order does the customer simply select the tender to be utilized?
 - ___ Does tender selection include fully integrated credit card processing with Secure Socket Layer (SSL) encryption provided?
 - ___ Does the application provide for credit card settlement automatically for the Bookstore without the need to key or scan the Packing List via the POS system?
 - ___ When the customer registers with the site, can they provide information about themselves and enter a password to protect their shopping profile?

- _____ Can the Bookstore view the customer information?
- _____ Can the customer information be sorted demographically?
- _____ Can customer purchasing histories be viewed?
- _____ 12. Will the application support the creation of customer centered product selections, views and promotions?
- _____ 13. Can discounting be performed based on a percentage or fixed dollar amount?
- _____ 14. With a simple click can customers put items in their on line shopping cart?
- _____ 15. Can the customer easily remove items from their shopping cart at anytime in the shopping experience?
- _____ 16. Does the application provide for the ability to update shopper orders directly?
- _____ 17. Does the application allow the user to easily track the customer order data such as dates, shipping specifications, total price, etc.?
- _____ 18. Does the application contain a flexible, easily adaptable interface that allows the calculation of taxation and shipping charges?
- _____ 19. Does the application provide an automatic Email response to the customer thanking them for their order?
- _____ 20. Does this Email response provide the customer with a link to the site that displays order status?

Administration

- 1. Can the site be customized in the following areas?

- _____ Pages
- _____ Templates
- _____ Graphical elements
- _____ Catalog navigation
- _____ Store flow
- _____ Pricing
- _____ Shipping
- _____ Taxing
- _____ Payment

Can site presentation variables include ?

- A Home Page
- Store Information
- Store Type
- Store Administration
- Store layout and style
- Buyer groups
- Discount information
- Shipping and Handling

5. Can the type of information maintained in the data base include the following?
- Names
 - Logos
 - Locations
 - Contact information
 - Merchandise descriptions
 - Merchandise Image
 - Merchandise price
 - Shipping information
6. Can new product or store data be entered into the application automatically from the host inventory management application web catalog database?
7. Does the application provide for security to specify who has the ability to (please answer “yes” or “no” to each):
- Access/update the database
 - Open or Close the Store
 - Update information about shoppers
 - Access/update customer numbers
 - View and update orders
8. Is classroom training for this product available?
9. Is training for this product available without travel requirements?
10. Does the application provide for full online documentation?
11. Are the training and documentation viewed with a Web browser providing access to the information from a variety of viewpoints?
12. Please provide your site activity reporting capabilities with your response.

Services – Maintenance

Support Services

Support services must include live support with the ability to speak to support personnel without the requirement that one leave a message and wait for a call back. Beeper service may be offered during off hours. Vendor must offer multiple support options including toll-free live support with twenty-four hour access to point-of-sale support personnel. Hardware maintenance must be available and pricing must be included in this bid. On-site support of hardware must be available.

Training Services

Training must be offered on each application proposed. Training should be offered on a per person / per class basis and must be priced as such.