Data Recipient Best Practice

Price and Availability

Disclaimer:

Please note: The information provided in this document is intended for guidance purposes only. Those involved in the creation, collection, management or distribution of product metadata are strongly advised to seek guidance on compliance with the business policies of their respective organisations.

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1. Introduction

What is 'price & availability', otherwise known as 'P&A'? Simply put, it is a subset of time sensitive metadata required by retailers and wholesalers to inform decision making processes in the business to business (ordering, stock management, sourcing) and business to consumer (order, don't order, order elsewhere) supply chains.

The data is considered sensitive (and complex). Availability can change daily. Pricing has its own complexity because although price changes may be less susceptible to constant change, pricing may need to reflect the needs of different markets (country, currency, amount, tax, customer type). This is important given that multinational retailers may need to source stock from different distributors to reflect different distribution rights in different markets.

Whilst a feed of P&A information can be requested and supplied on an ad hoc basis, more usually a combination of full and delta files is supplied on a high frequency basis, as agreed between the sender and recipient. 'High frequency' will vary from organisation to organisation, dependent on business need.

2. The Goal

P&A is there to provide data recipients with accurate, unambiguous and actionable information that reflects the frequency of changes to price and availability information at product (ISBN) level in their market.

It should be done in a standard way, allowing users to self-serve through automated routines. The process(es) should avoid unnecessary complexity and remove the need to make phone calls or send emails to establish P&A at product level. Each trading partner will have their own preferred format for requesting and communicating P&A. This can become onerous for businesses managing multiple feeds and clients – not only in terms of development and set up, but on-going support.

P&A changes should be relevant to the data recipients' clients, their market(s) and reflect the needs of the organisations at the bottom of the Metadata Supply Chain Map (see page 9) - particularly the relationship between physical distributors, wholesalers and retailers. For e-commerce, responsiveness and customer service are paramount.

For the purposes of the Data Recipient Best Practice Project, order acknowledgements and order response codes are out of scope.

3. Relevant Standards

Below we have laid out those standards commonly referred to and/ or used when communicating P&A. Business and operational need will inform which standard(s) are applicable.

a. Where there are millions of lines of P&A being exchanged (rather than individual record look ups), with a need to drop the information into a database for easier management, developers will have an immediate and preferred option - CSV or tab delimited format. Bespoke formats such as these may not reflect best practice but meet a specific business need.

As the demand for P&A information grows, so does the expectation that it can be delivered on demand. The EDI standards that have been traditionally relied on are no longer entirely fit for purpose. We recognise the continued importance of these but have labelled them 'not best practice' below, if immediacy of information is a business need.

b. TRADACOMS P&A. Not best practice. This is a traditional and legacy EDI standard using batch type processing. This neither reflects the immediacy of P&A nor does it have the ease of implementation of API message sets. Additionally, the standard does not reflect the potential complexity of price and availability information by market.

c. EDIFACT PRICAT Price/ Sales Catalog Message. Not best practice. As a traditional EDI standard, this uses batch type processing which neither reflects the immediacy of P&A nor does it have the ease of implementation of API message sets. As with TRADACOMS, it cannot capture the potential complexity of price and availability information by market.

The newer, API or internet-based communications, are ideal for immediacy and P&A requests for individual or small numbers of product records.

d. BIC Realtime (Retrieve Price and Availability, April 2020).

e. EDItX (Stock Enquiry and Response/ Status Report v1.2, February 2014).

f. System specific solutions such as Pubeasy.

Remember that each standard for communicating P&A may handle features of price and market availability in different ways.

4. Points to Consider When Developing, Establishing or Reviewing P&A Capabilities

a. What if web services aren't the preferred method of communication? P&A web services should be the go-to approach for the exchange of P&A information. EDItX and BIC Realtime are the current standards. If neither of these standards is adopted, then a form of P&A that aligns with standards more generally is preferable. Whilst not best practice, older EDI standards (such as the TRADACOMS PVUINF Price and Availability Updates File and EDIFACT PRICAT Price/ Sales Catalog Message) may be acceptable to data aggregators and other trading partners more generally. Their drawback is that updates are not provided in real time.

b. ONIX block updates (or partial updates to block 6) can be used to update P&A and can be a simple and effective way of updating time critical information. The advantage of this is that any price that's 'advertised' in the pre-pub metadata can be updated. The other standards (excepting perhaps EDItX and RealTime) and typical CSV-type updates cannot include all relevant details of 'a price' when there are details like country or end-purchaser type involved.

c. EDItX and BIC Realtime are the ideal standards-based solutions. They can manage complexity in prices. For the purposes of the Data Recipient Best Practice Project, pricing needs to focus on the UK and Ireland.

d. Is the complexity in pricing undermining global standards? No, it reflects the reality of pricing for some (but not all users).

e. How many organisations are using a bespoke (such as CSV or text) format? A significant number. Reasons include:

    i.   Non-book industry users.
    ii.   The lack of understanding of book trade web services standards.
    iii. The need for solutions to be implemented quickly and/ or manage extremely large volumes of data.

     iv.   Long-established proprietary solutions (such as Pubeasy).
     v.   The perceived complexity of block updates.
     vi.   Legacy or other system constraints.

However, it is worth noting that a bespoke format such as a CSV file cannot communicate the complexity of prices (territory, customer type) required in some trading relationships.

5. Other Points to Note and Address

a.   Full files should be delivered once a day, with delta files hourly (or more frequently according to business need). Note that in the context of price & availability (rather than metadata feeds more generally), full feeds and deltas need to be delivered on a high frequency basis, potentially multiple times per day.

b.   Consider the impact where full/ delta files aren't received every day. Will the recipient be aware of changes in P&A? There will be an information lag.

c.   When establishing the optimum frequency for full and delta files, take account of senders' and receivers' order and fulfilment routines, and working day (local time zones). File content should reflect the territories in which the trading partners operate. A 24/7 process may be the least onerous solution. Indeed, the parties may agree that the simplest approach is to provide a full feed (as opposed to a full feed with deltas) every time. This may be a simpler way of communicating the supplier's complete inventory accurately, as it will take account of any changes since the last full feed.

d.   New title information should be available in good time ahead of publication date. We recommend making this information available 16 weeks in advance of publication date for physical and digital products and 3 weeks for digital audio products, as a minimum. There are fewer issues with backlist. Consider the availability codes to be used (and from which standard's code list these will be taken).

e.   We recommend the regular housekeeping of P&A feeds. Inventory size, stock turn and trading partners will need to be taken account of when considering what regular housekeeping means.

     i.   Major updates should be scheduled when data recipients are available to monitor inbound data
     ii.   Taxes such as VAT or GST should be communicated appropriately, according to the standard's specification and in accordance with the needs of the local market
     iii.   Availability updates (deltas and/ or full feeds) should be provided to a pre-agreed (high frequency) schedule, using a pre-agreed method and format (ideally standards based)
     iv.   Beware of including historical data in files, such as products out of stock for more than 12-months
     v.   Where items are no longer supplied by a given distributor, it is perfectly acceptable for a period of overlap where the old distributor references the new distributor, and the new distributor quotes current and accurate product availability information
     vi.   Use Related Product in ONIX to identify other versions of a product that is no longer available

f.   Note these definitions of full feed in the context of P&A:

Distributors

A full feed should include all active titles and everything that has become inactive (because it is no longer available, or you no longer distribute it, or it has been cancelled) in the past 12 months. It should not include anything that has been inactive for more than 12 months (unless a different parameter has been agreed between data sender and data recipient).

Note the definitions for 'active' and 'inactive' below. These are taken from the current version of EDItEUR's ONIX Code List 64, Publishing Status.

> *Active: The product was published and is still active in the sense that the publisher will accept orders for it, though it may or may not be immediately available.*
>
> *Inactive: The product was active but is now permanently or indefinitely inactive in the sense that the publisher will not accept orders for it, though stock may still be available elsewhere in the supply chain.*

All forthcoming titles that have been previously supplied should also be included. Unless by prior arrangement, the full feed should be delivered via your normal electronic file format.

g.   Publishers

A full feed from a publisher should contain all active titles. Anything that has become inactive in the last 12 months should be included (unless a different parameter has been agreed by between data sender and data recipient). All forthcoming titles that have been previously supplied (with territory pricing or market rights changes as required) should be included. Publishers should ensure that they provide product information that is as complete as possible for all areas of the record, including descriptive content. Unless by prior arrangement, the full feed should be delivered via your normal electronic file format. Full feeds should ideally be sent by arrangement between the sender and recipient.

Regular updates of product records should be provided even if nothing has changed in terms of an organisation's pricing and availability. It is important to regularly confirm current price and availability status to data aggregators and all other trading partners to avoid assumptions being made about products' status.

h.   Do not create or use proprietary codes in house. These risk being included in P&A files to trading partners, causing confusion. Similarly, do not misappropriate or misuse existing, standards-based codes.

i.   The conventions for P&A in relation to out of print (OP) titles should be to report products as OP up to one year after the actual OP or permanently withdrawn from sale (PWfS) date, rather than to simply stop sending the data. Removing the audit trail immediately would cause confusion, generate unnecessary queries and create ambiguity. Remember that 'out of print' could mean 'unavailable' or that '*existing* stock is still available in the supply chain, but no *new* stock is available'.

j.   The sending of files needs to be continuous, consistent and in the correct sequence (mirrored by receiving and processing routines). Reference BIC's 'Deletions' document if necessary.

k. P&A queries tend to happen up front when the format and processes are being established (or changed without warning or agreement). Ensure that contact information is shared so that issues can be resolved in a prompt manner.
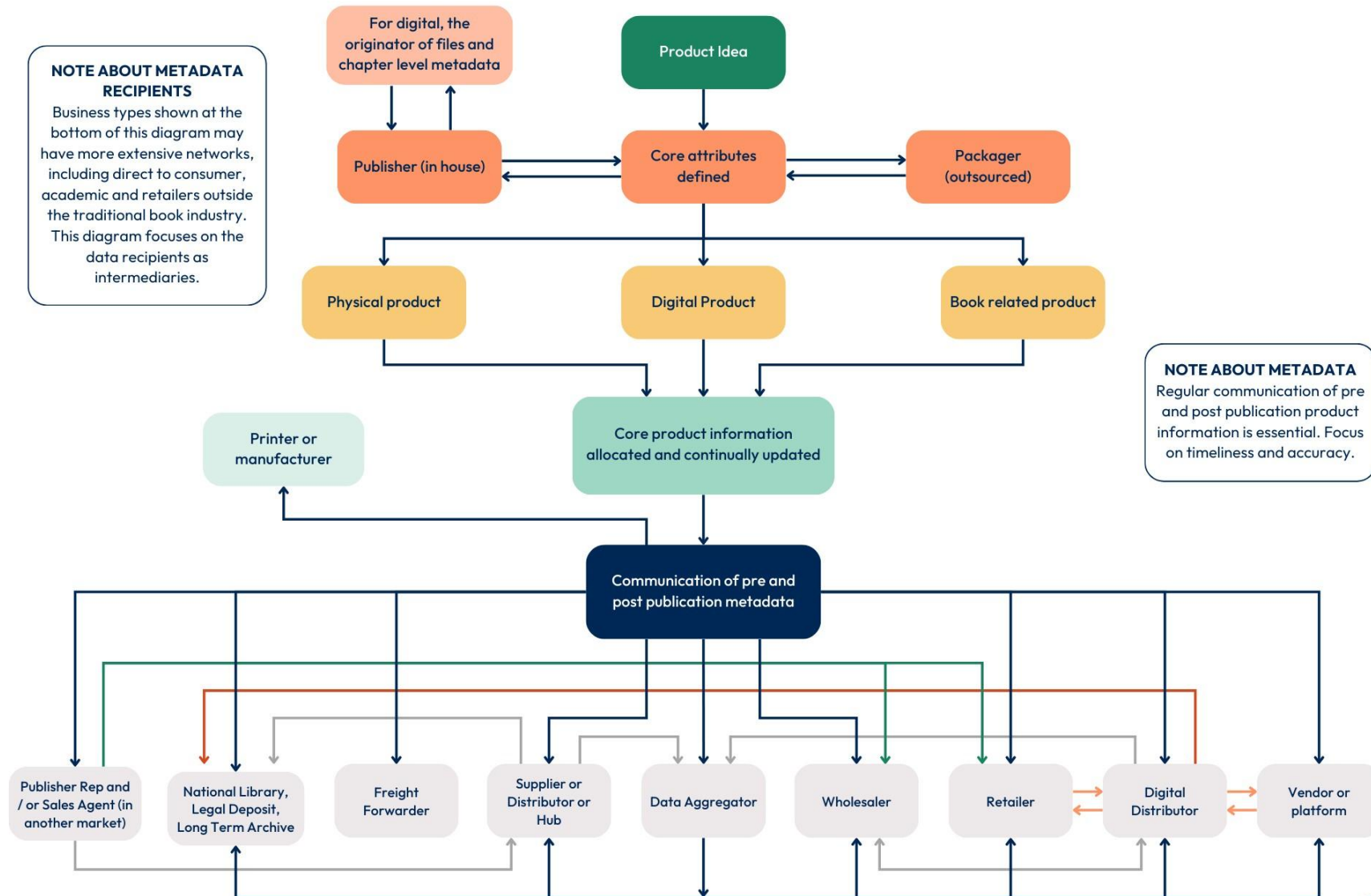
6. The Value of P&A

a. Enhances tradability.
b. Handles potentially large volumes of time sensitive and business critical data.
c. Efficiency and responsiveness.
d. The focus is on two specific attributes, where changes to data can be frequent and/ or complex.
e. Automated and standards driven.
f. Can operate 24/7 if required.
g. Acknowledges today's preference for self-service.
h. Ease of set up between trading partners when standardised.
i. "Smart". Make informed, proactive business (b2b) decisions. Applies also to end consumers.
j. Customer focused.
k. Can inform other routines and processes (such as ordering and fulfilment).
l. Immediate, unambiguous and actionable.
m. Mimics the overall approach to metadata management by using a combination of full and delta files.

7. Questions and Reminders

a. Consider the needs of the P&A data recipient. For example, is the information powering an online retailer or a physical store?
b. Is information required for just one territory or multiple markets?
c. Is the requirement simple or more complex (such as multi-territory pricing)?
d. Will multiple territories (and time zones) mean that feeds are required around the clock?
e. Is there a requirement for one or multiple feeds? To one or multiple trading partners?
f. Would a standards-based or bespoke approach be more manageable? Sustainable?
g. Can an intermediary provide a solution?
h. How extensive is the inventory? How quickly does stock turn over? Does this have implications for the preferred solution?
i. To what frequency will full feeds and deltas be required?
j. Is there a documented timetable and contact information should there be issues?
k. What are the requirements for titles not yet published or out of print?
l. Remember that the status of products where neither price nor availability has changed should still be regularly confirmed.
m. If using a bespoke feed, consider how the use of proprietary codes may cause conflict with recognised and established standards. They may also be a source of ambiguity.

[continued overleaf

NOTE ABOUT METADATA RECIPIENTS
Business types shown at the bottom of this diagram may have more extensive networks, including direct to consumer, academic and retailers outside the traditional book industry. This diagram focuses on the data recipients as intermediaries.

For digital, the originator of files and chapter level metadata

Product Idea

Publisher (in house)

Core attributes defined

Packager (outsourced)

Physical product

Digital Product

Book related product

NOTE ABOUT METADATA
Regular communication of pre and post publication product information is essential. Focus on timeliness and accuracy.

Printer or manufacturer

Core product information allocated and continually updated

Communication of pre and post publication metadata

Publisher Rep and / or Sales Agent (in another market)

National Library, Legal Deposit, Long Term Archive

Freight Forwarder

Supplier or Distributor or Hub

Data Aggregator

Wholesaler

Retailer

Digital Distributor

Vendor or platform