



Book Industry Study Group, Inc.

# Sales and Tax Reporting Templates

Schedule for Revisions

## 1. PURPOSE

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The purpose of revising the Book Industry Study Group's (BISG's) Sales & Tax Reporting Templates is to accommodate the evolving requirements for sales reporting of digital products, given changes in the bookselling environment. These changes include modifications to the Agency Pricing Model resulting from recent decisions handed down by the U.S. Department of Justice, the continued growth of digital products, and the development of new business models surrounding sales of both digital and print product.

## 2. BACKGROUND

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The original templates were published, in both flat file (Excel) and XML versions, in June 2011, and minor revisions were made in February 2012. Based on EDItEUR's EDItX Sales and Tax Report, version 1.1, and developed with EDItEUR's assistance, the BISG templates were created specifically to meet the unique needs of the North American book trade.

The BISG Sales and Tax Reports are intended to be used by a retailer, distributor, or other intermediary, or by an agent reporting on their behalf, to report sales and sales tax to a publisher or content owner.

Such sales reports are the basis on which payments are made to the publisher, either by the seller or, if the seller is a branch of a larger organization that purchases centrally, by the central "buyer." The reports are suitable for use with both agency and wholesale models, and in both digital and non-digital book product supply chains.

## 3. REQUESTED REVISIONS AND DISCUSSION POINTS

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1. Version Control—Versions and release dates will be controlled and indicated moving forward.
2. For US transactions, zip code format should be zip code + four.
3. Addition of field for tax-exempt sales.
4. Other Agency reporting requirements—for discussion.
5. Library Subscription sales reporting—for discussion.
6. Rental Models—for discussion.
7. Definitions for XML Sales Report:
  - a. AddressLine (5 occurrences)
  - b. Author
  - c. OrderDetail
8. Tighter constraints on string lengths and value ranges where practical (e.g., limiting the number of decimal places allowed in a given field).

## 4. TARGETED PARTICIPATION

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Participation in this revision cycle should represent the entire spectrum of the reporting process—from publishers to retailers to distributors and other similar intermediaries. A determination should be made at the outset of this initiative as to which companies' participation is deemed critical for adoption.

## 5. PROPOSED REVISION SCHEDULE

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- Kick-off: Wednesday, September 19, 2012.
- Working Group meetings: Every two weeks through December 19, 2012
- Revised template drafted and approved by Working Group: January 11, 2013
- Final revised template submitted to BISG membership for Approval: January 25, 2013
- Final revised template submitted to BISG Board for Approval: March, 21, 2013
- Publication of Revision: April 2, 2013.

## 6. ABOUT BISG

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The Book Industry Study Group, Inc. (BISG) is the U.S. publishing industry's leading trade association for policy, standards and research. As not-for-profit organization, it draws members from every sector of the book business and serves as a forum for managing change and enabling interaction among publishers, manufacturers, suppliers, wholesalers, retailers, librarians and others engaged in the business of print and electronic media.

In addition to creating and maintaining industry standards in areas such as product identification and description, bar coding and labeling, electronic commerce and digital content distribution, among other things, BISG gathers and analyzes statistical information about the entire U.S. book supply chain in order to evaluate and assess current industry trends.

Additional information on BISG may be found at [www.bisg.org](http://www.bisg.org).