edelweiss

Sales Rep Training Presentation and Handout

Contents

About Above the Treeline

- **Above the Treeline** LLC is our company. Privately held, and based in Ann Arbor, Michigan.
- We produce two software services for publisher and booksellers.
    - **Edelweiss**
        - A web-based system, launched at BEA 2009 that presents publisher or distributor catalogs and new title information interactively. There are now about 170 publisher and distributor subscribers.
        - Approximately 17,000 reader users (retail, library, media etc) have logged on and used Edelweiss within the last 6 months (*Feb 2014*). Of those, about 2,600 are retail or wholesale users.
    - **Treeline Analytics** (formerly “Above the Treeline” our original service since about 2001)
        - Approximately 450 store locations (indie stores in the US) submit POS data to us nightly, and then use Treeline to analyze their store in the context of other stores, as well as do category analysis, through a friendly web-based graphical interface.
        - We also have about 20 subscribing publisher clients that can access the same kinds of charts to review aggregate sales and inventory, and, with the bookseller permission, individual store data.
    - Edelweiss users do not need to be Treeline subscribers, or vice versa.
    - Most Treeline Analytics clients are also Edelweiss users.

What Edelweiss Is

- Edelweiss is a web-based system for presenting catalogs and (new) titles to customers electronically
- Built around a functional workflow for reps and stores, and shaped initially by a group of pilot publishers and ABA stores
- **Free** for any catalog reader (retailer etc)
- It can change the sales process by facilitating more visibility of information for stores and reps with more current catalog data, which leads to better communications and decision-making
- For most publishers, it is an adjunct for paper catalogs: using paper with some accounts, Edelweiss with others. Dependent to an extent on comfort level and accounts. So not necessarily a wholesale change immediately.

"While I'm not the most committed Luddite out there, I was initially leery of giving up my paper catalogs. But Edelweiss has changed the entire buying process for the better. The value of my sales reps being able to make suggestions before our meeting, the ease of having all the information together on one screen - comparative sales, print run, publicity - the enormous savings in time - no more tedious data entry - *all this has enabled me to spend more time with my sales reps, brainstorming, discussing in depth titles that are important to us, looking at backlist."*

Karen Corvello, R.J. Julia Booksellers

How it Works for Retailers and Other Catalog Readers

The system is free to any end user, and can be accessed with or without a login (registered and unregistered). There are over 4100 *registered* retail or wholesale users (also many additional registered users such as librarians, reviewers, academics, and bloggers)

Reader Features – Registered vs Unregistered Users	**Registered** (and logged in)	**Unregistered** (or registered but not logged in)
See all 'public' catalogs from all Edelweiss publishers	✓	✓
See rep markups layered over the catalogs (markups can consist of rep notes, tags, adjusted comps, priorities)	✓	✓ (only via email link from rep)
Research titles by searching or browsing by subject	✓	✓
Create orders	✓	✗
See *your* suggested order quantities for titles	✓	✗
Tag and make their own notes on titles	✓	✗
Organize titles by tags	✓	✗
In some cases, see their own actual initial sales for comparable titles (for stores also reporting sales/inventory to Treeline)	✓	✗
Generate emails with title information for their customers, colleagues, or requests back to reps	✓	✗
Export title data and orders, and import into their POS systems (eliminating data entry for new titles)	✓	✗
Request Digital Review Copies (DRC's)	✓	✗
Research titles by proximity of authors (Geosearch) or Internet buzz	✓	✗

Key Rep Features

Your view of Edelweiss is rep-specific, but similar to retail view. Publisher rep users can:

- Create and share markups
- See their accounts' actual initial sales for comparable titles (for stores also reporting sales/inventory to Treeline)
- Attach personal / sales conference notes to any title – these are visible only to you
- Add suggested order quantities for titles for specific accounts, or create 'final' orders on their behalf
- Access store orders to export to submit, or export to Excel, a text file, or PDF
- Generate HTML emails or PDF files of any selected titles
- Create collections – rep-specific catalogs that can be shared with accounts

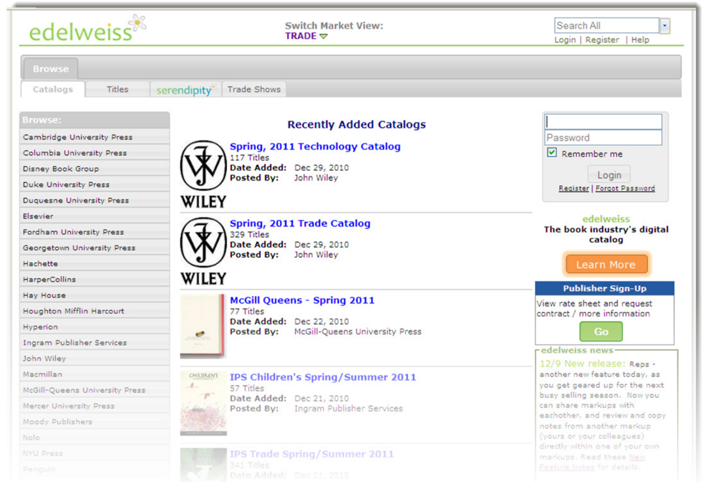
"I can share my notes with accounts that may not have representation.... Basically I put in Edelweiss everything I would say to an account," said DeCourcey. "The outreach can be far greater than just the accounts I've got." *Anne DeCourcey (Harper) in Bookselling This Week, July 29, 2010*

About Markups

- a Markup is a **version** of the catalog annotated by you
- Markups can consist of **notes**, **tags**, **priorities**, **adjusted comps**
- A Markup is tied to a specific catalog or collection
- There can be multiple markups per catalog or collection
- Any of your markups can be **shared** with users at one or more of your accounts – which layers your annotations over their view immediately

Logging In

How To



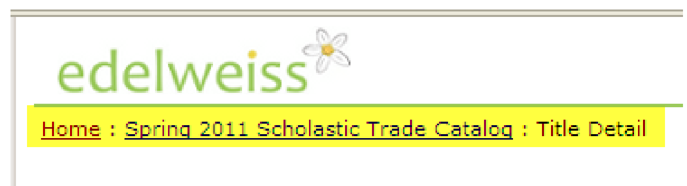
- Refer to the email you received with login instructions
- Once logged in, you can change your password by going to *Administration->User Profile->Change Password.*
- If you are registered but can't find the email, go to http://edelweiss.abovethetreeline.com or http://edel.bz enter your email address in the login area, and click on **Forgot Password**.

More

- Any user – retailer, librarian, teacher - can register for Edelweiss for free at this same location
- www.abovethetreeline.com is also a resource for more information, help documents etc.

Basic Navigation

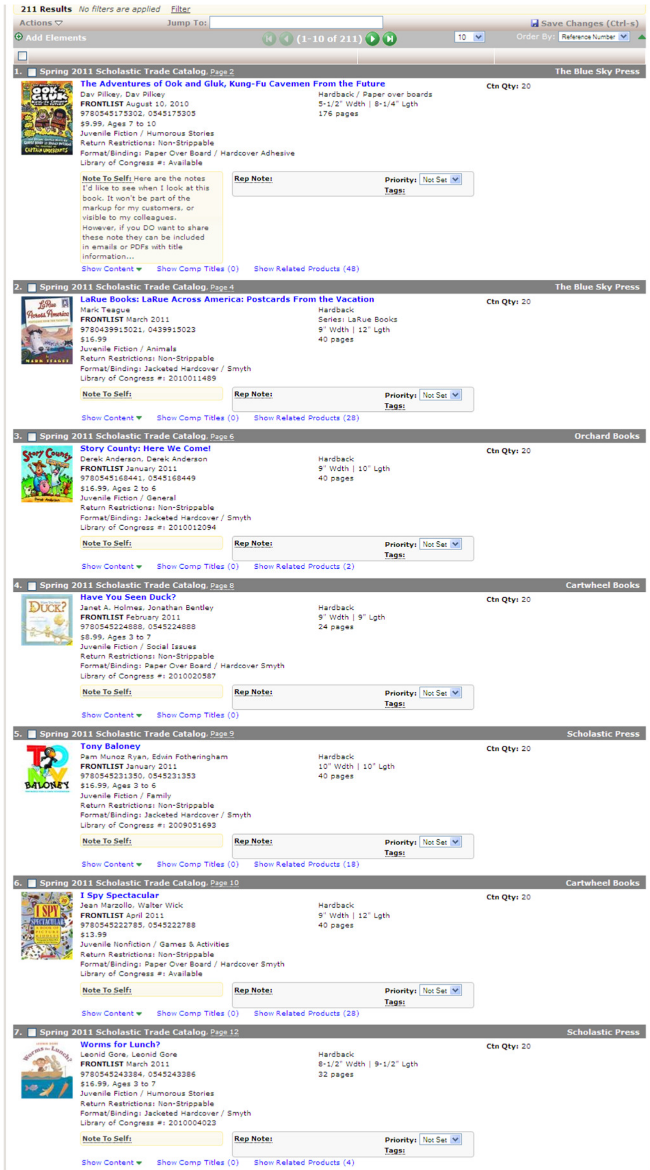
- When you login, the default page will show your company's catalogs. In additional to the **Our Catalogs**, you will also see **All Catalogs** and **Collections** under the main Browse tab. **All Catalogs** includes all other publisher catalogs, collections is a feature that allows you to build your own group of titles that can behave like a catalog.
- Over time there will be groupings of catalogs such as past season's catalogs, or by category or market.
- Catalogs can be analogs to paper catalogs – or not – but initially they generally have the same group of titles as the paper versions. There can be separate add-on catalogs for titles that drop in after the catalog is published in Edelweiss (normally titles will also be added to the Edelweiss catalog too). The catalog administrators at your company can also add themed catalogs, or catalogs for special markets with any combination of titles.
- Click the catalog name to open a catalog, or click the catalog cover to see a larger image.
- Navigation – for best results, use the 'breadcrumb' navigation at the top of the screen instead of the 'back' button in your browser. These are hyperlinks that are a trail of the areas of the site you have just been to, so you can go back one or two steps at once.



- There are two views of title within a catalog- most people (especially reps) stick with this list view, but there is also a single title per page view. You can reach that by clicking on a title.

Using the "list view"

- This is a compact view, but **show content** will reveal all other marketing content, and all data and functions are available from this view.
- Content is updated **weekly**. Store view is also current.
- **Title sequence** is publisher determined, normally same as paper catalog. Can change the sort order things like title.
- **Filtering** allows you to narrow down to just the titles in a certain subject category, format, imprint, etc
- Defaults to 10 titles per page, goes up to 100



Using the "list view" cont.

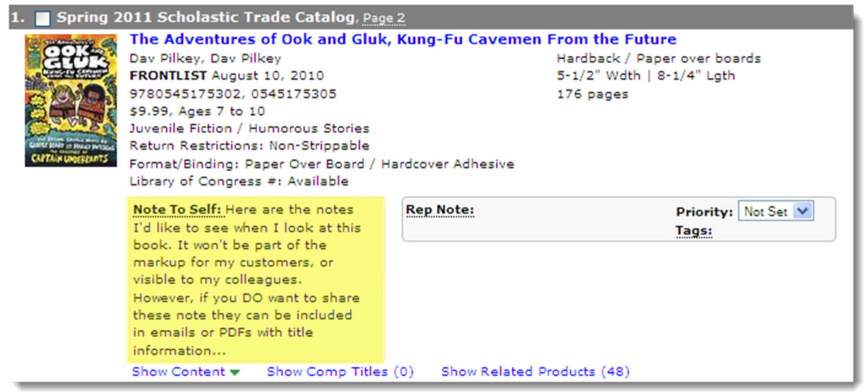
- Finding a title – use **Jump To** to bring the title in the catalog to the top. Start typing a **title**, **author**, or **ISBN**, and press enter to select a title
- The **Actions menu** is key to other functions: for example, open up all marketing content for titles, on this page; act on selected titles as a group to hide, tag, email, build a collection of titles, generate a PDF, or print.
- **Set Display Elements** on the actions menu allows you to what you see in your view of the data – for example, you could remove the book dimensions from your view if you don't need to see it.
- Note that making changes to your view of the titles (such as filters, sorting, add elements) *does not affect the layout of a markup for your accounts*. All users have these same kinds of controls.
- Click cover image to make it fly out and expand

The Detail Page

- To see a single title per page view, click on the title in the list view.
- All the same data is on this detail page, and the same facilities for marking up and annotating a title exist here too.
- To continue viewing titles in the detail page view, progress through the catalog with the control in the upper right.
- Or using the **Jump To** option to get to another title in the catalog quickly

Add your own sales conference notes, or other personal notes to titles

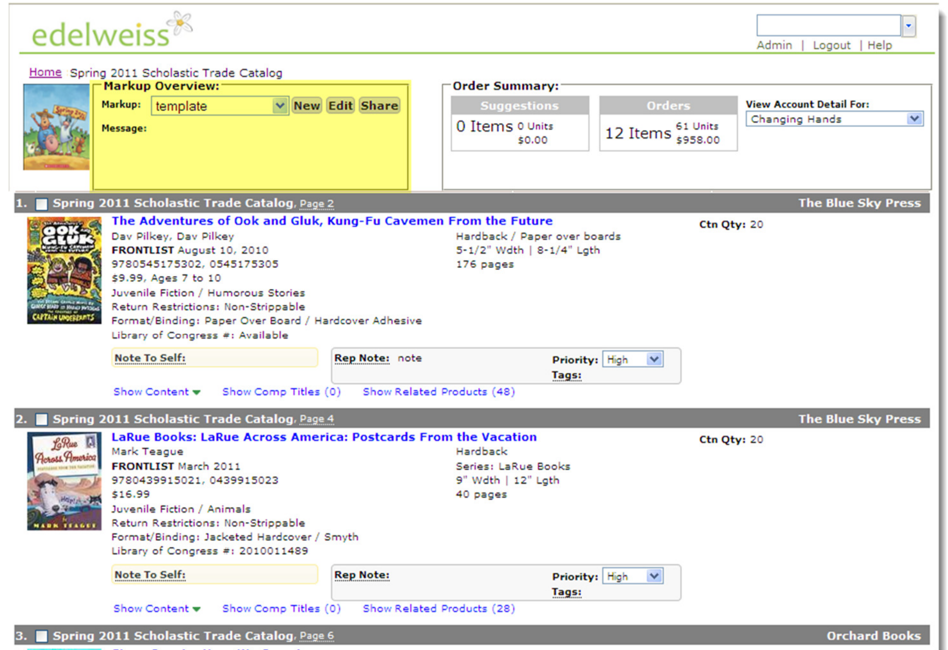
- Yellowish **Note To Self** = your personal notes on a title.
- Click on note to self, start typing, then **save**
- **Only visible to you**, (unless you choose to email or generate a PDF that includes 'your note')
- Email contents determined mainly by the 'display elements' already set on your screen (an option on the **Actions** menu)
- Attached to the title, so will always be here until you change it



- **Note:** This is different from **Markup Notes** which are notes that are part of a full markup that will be visible to any account you **share** that markup with
- The **Note To Self** is also accessible and editable in the detail page (single title) view in a yellow post-it notes style

Starting a Markup

- Top of the page has a markup name. It defaults to one called **default** – you can change this by using the **edit** button
- The markup name will be **invisible** to accounts you share with, so name it in a way useful to you. You can always change it later.
- The message *will* be visible to people you share with
- You can start with a template, then create other versions based on your first template markup by copying elements from the template to other markups. *(click new – give it a name, select an existing markup, and select the markup elements you want to copy from that markup)*

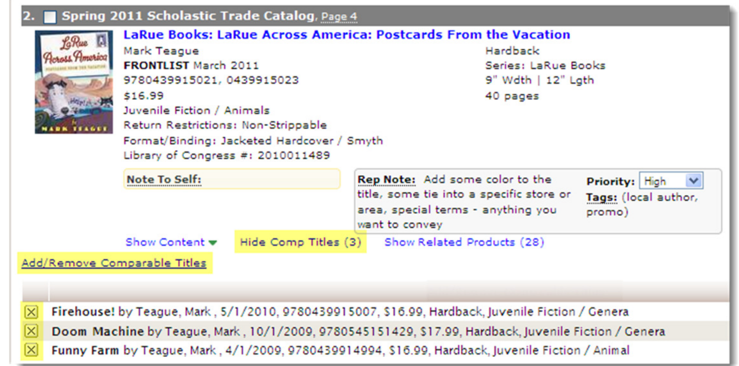


- Copies of your original markup can then be tweaked and changed, and then will diverge from the original.
- You can create as many different markups (catalog versions) as you like
- Or start from scratch with a new, completely empty markup *(click new – give it a name, and do **not** select another markup to copy from)*
- Markup names and shares can also be seen from **Our Catalogs** page. Unshared markups can be deleted from there too.

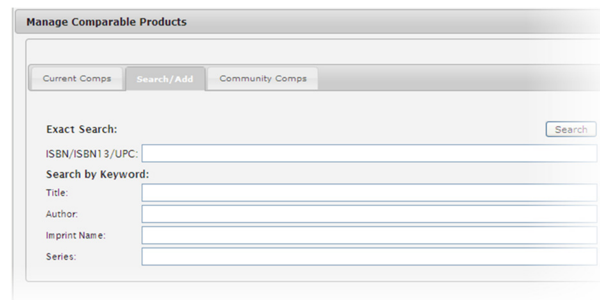
Markup elements

- Markup elements for each title are in the area in **blue** – plus the ability to customize comp titles.
- **Markup Note** – your main communication about a title to your accounts. Free form notes – plenty of space.
- **Tag** – tags are keywords or phrases you can create, and may use repeatedly. Examples are things like "**COOP eligible**" "**Local Author**" "**Extra Discount**" "**Father's Day.**" You can apply multiple tags per title and the system will remember tags you've used before. Retailers can see and group titles by tag.
- **Priority** – this indicates to your customer the relative importance of the title. Your customers can filter or sort the catalog base on your priority.
  - **not set** – this is the default (no priority or label for it will show to your customer at all)
  - **featured** (the item will stand out because the background will be highlighted in yellow)
  - **high** (**high** priority text will be in red for your customer)
  - **low**
  - **hidden** (use sparingly – if you need to hide a lot, make a collection instead)

Markup elements cont. – customize comp titles



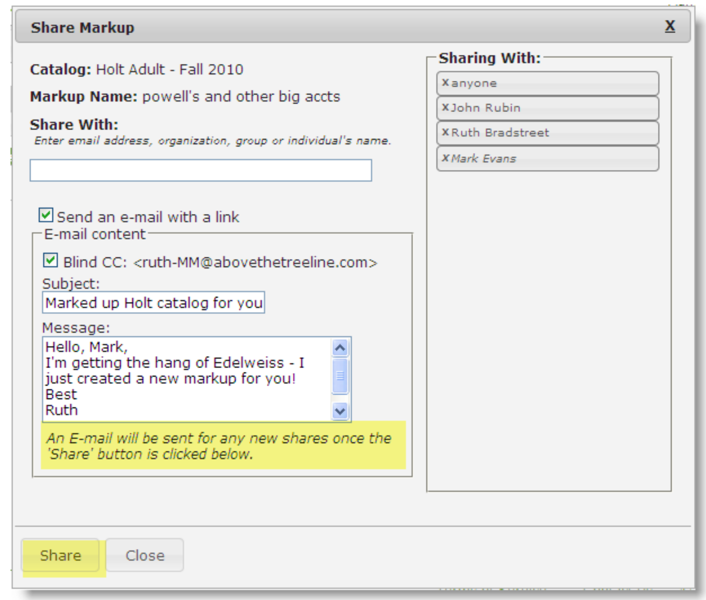
- Initial or core comps are typically provided by your company
- Click show comp titles to reveal any existing comparable titles
- You can customize a markup by adding or removing comps and also borrow comps that other reps may have added.
- Select *Add/Remove Comparable Titles*
- Search to find titles (a cross-publisher search), and then select and click **ADD**.
- Click x to remove.
- Check **Community Comps** to see other rep or retail comps that have been already added to this title
- If you have an account selected that provides sales to Treeline you will see their initial sales, inventory, and turn history for the comp titles*, as well as current stock status.



***Note**: if you have a Treeline account and see no Treeline data where you expect to, please contact us. Inactive Edelweiss stores may not yet be populated with Treeline data in Edelweiss.*

Sharing a Markup

- **A markup does not become visible to anyone else until you 'share' it.** So this is the last but crucial step in the markup process.
- Click **share** at the top of the list view, or from the main page
- Type in a contact name – **individual**, **whole store**, or a **group** of contacts to share with
- An **email** will also be sent as a notification
- Markups are **dynamic** - changes you make to the markup after sharing will appear for the end user immediately
- **You can (and should!) share markups with people that are not registered Edelweiss users** (have no login)– their access to the markup will be via a link in the email only



- You can un-share if you change your mind – this removes the visibility of your notes from those people completely
- You do not *have* to share a markup - for example, if you make a template or a test markup, you probably would not share it at all
- You can share markups with your colleagues. Markups shared with you will be indicated by an asterisk (*) before their name and you can save a copy as your own, or share that markup just as it is.

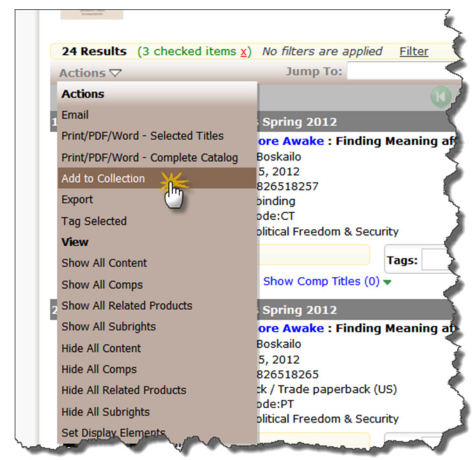
Making Order Quantity Suggestions

- Select an account from the drop-down list
- Opens up suggestion boxes
- Not part of the markup itself
- **Entering and saving a suggestion makes it visible to that account immediately**

- Multi-store accounts will have more than one box, like this example
- You can set the 'autosave' checkbox at the top of the page to save suggestions automatically as you go. If not - click on **Save Changes** periodically to save all the suggestions on the page. **CTRL-S** is a shortcut for saving suggestions as well.

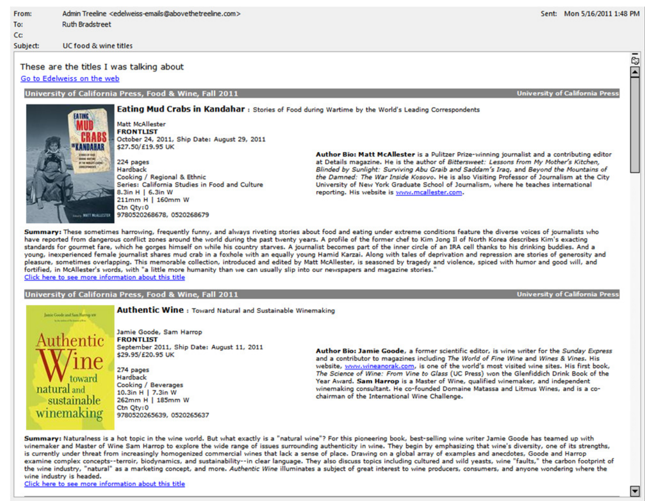
Collections: Make you own catalog-like list of titles

- Collections are a way for you pull together any of your Edelweiss titles into a list.
- Collections are private to each rep, but can also be marked up and shared to make them available to customers
- Good option for special sales groups – if you are not selling all titles in a catalog
- Make collections by category, or for promotions
- Arrange titles in the sequence you prefer
- It can act like a catalog in many ways, mainly that it can be marked up and shared like any other catalog. Or use it to just keep a group of titles you want to email together
- This is also an alternative to 'hiding' a large number of titles in a markup based on a large catalog for an account that only needs to see a subset of titles
- To create, edit, and use a collection
  - From the list view of any catalog, select titles (check boxes) then **Actions -> Add to Collection**. You can keep adding more titles to the same collection from this or any other catalog. You might use the filters to first select only a certain category.
  - You can also keep adding titles from a search result, or from the **Titles** page where you can browse your books by category and other criteria, instead of by catalog.
  - Or, from the **Collections** tab, click **Add a Collection**. Then add titles by ISBN
  - 'Edit' allows you to resequence the titles, or to remove titles from a collection
  - Click the collection name to markup and share a collection with customers
  - If you need to pull together a disparate group of titles for any reason – to share, email, or generate a PDF, a collection is the way to go



Other Ways to Share Your Title Information: Email

- Title emails from Edelweiss allow you to embed the title information directly into the body of an email
- Can be used to reach any account, or anyone really, by email
- **Email:** generate HTML emails from titles when…
    - You want to send one or a handful of titles to an account to follow up on a sales call, to let them know about a drop in, or new information about the title you want to push out
    - If you have specialty accounts that may just need to see a few titles



- How to generate emails
    - Use the checkboxes to the left of each title in the list view to select titles. Or you can also use the Email icon within a detail page to email a single title.
    - Select Email from the Actions menu
    - Add recipients – either from your contacts (start typing a name to find) or add any email address below.
    - Add email subject, and message to appear before the title(s) in the email
    - Select from Basic or Expanded formats (for a few title, Expanded is recommended) select/change the elements included (if necessary), and other attributes (they will vary by template selected)
    - Click on SEND to send the email

Other Ways to Share Your Title Information: PDF

- A PDF is a printable file that can substitute for a paper catalog more literally than a markup
- Remember that PDFs are static files as of when you create them, and unlike a markup, prices and other title information won't change dynamically as things update.
- Generate PDF Files titles when…
    - You want to create a file that can be printed, with any group (subset) of titles
    - You prefer to send an email attachment with title information
    - Maybe for specialty accounts, as an alternative to the email for sending a set of titles
    - You need a printed catalog for a customer and don't have access to them…
- How to generate PDF files
    - Within a catalog or collection, use the checkboxes to the left of each title in the list view to select titles.
    - Select Print/PDF/Word – Selected Titles from the Actions menu
    - Or – if you want to create a PDF of the whole catalog or collection, select Print/PDF/Word – Complete Catalog
    - Select from the range of templates from 'complete' to '12 per page'
    - select/change the elements included (if necessary), and other attributes (they will vary by template selected)
    - Click on PRINT to generate the PDF
    - You can also create a Word document in the same templates instead by selecting Word (docx) at the top of the Print dialog box.

About Contacts

- For initial setup, we can connect Edelweiss-registered stores with the appropriate reps to pre-populate your Edelweiss **Contacts Tab**.
- From then on, you can add additional accounts in the Contacts Tab – Edelweiss users or not.
  - You can upload files from Outlook, Excel
  - You can manually add contacts
  - However and whenever you add new contacts, our system checks to see if that person already has an Edelweiss account (the cross reference is by email address). If they do you will be connected to the whole store (stores are 'organizations' in Edelweiss) – including other registered users within the same store.
- You can send markups to any contacts, regardless. People that are not logged in can still use the markup from the link in the email notification, but will need to register or log in to use full Edelweiss ordering features.
- You might plan on sending an introductory email to your accounts about using Edelweiss
- If you have accounts that are new to using Edelweiss and have any questions, need help logging in, or would like to sign up for a demo please have them contact us on support@abovethetreeline.com or go to www.abovethetreeline.com for more information or to register
- If you would like any information to take to an account that wants to know more, review our FAQs section of the help area. There is a link to downloading a flyer for stores about getting started.

Store Orders

- Most Edelweiss store buyers will create orders in Edelweiss and save order quantities to it. For two main reasons:
    - They can import to their POS setting up the new titles and the order
    - So that their rep can see and pick up the order from Edelweiss
- Individual store orders quantities will be visible on the right, next to your suggestion box
- And, complete orders will be visible under **Orders** tab
- Four criteria make store-created orders visible to a rep
    - Retailers must check a box when creating or editing the order data to 'share with rep'
    - You must have that account in your Edelweiss contacts
    - There must be at least one of your titles in the order (other titles would not normally be on the order, but if it has titles from another vendor, they will not appear to you)
    - The retailer must have not 'bound' the order to another vendor
- From the Orders tab, you can review the order in the Edelweiss standard layout (click the order name)
- You can review, and export orders from the **Export Preview** view.
- Files can be exported to Excel, or a text file. You can create your own custom layouts for order export.

Rep Orders

- You can also use Edelweiss to **create an order on behalf of a store**, like an order form
- This scenario usually applies when the account does not use Edelweiss, but you'd like to get the order into Edelweiss for one reason or another. Also it is a just a convenient order-taking tool.
- Rep-created orders can be connected to a particular Edelweiss account in your address book too. In that case, the order can also be made visible to the account, normally so that they can download it to their POS.
- To create an order, click Create Order at the top of the screen. Here you must name the order (we recommend naming it for the account).
- Complete orders will be visible under **Orders** tab
- From the Orders tab, you can review the order in the Edelweiss standard layout (click the order name)
- Like store orders, you can review, and export orders from the **Export Preview** view.

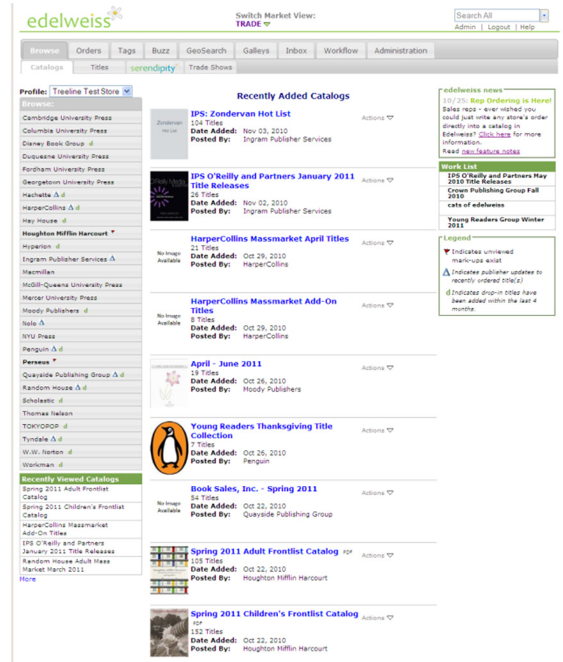
Sales Calls

- See the bookseller quote – this can be an opportunity to create more productive sales calls
- Recommend discussing with your key accounts. Ask what they want in a markup – do they want any particular tags, do they like order suggestions?
- If they are a Treeline store, make the most of comp title information and research your accounts comp title sales for key titles in advance.
- Active Edelweiss users will usually review your markups in advance of the sales meeting. They may mark initial orders – if they do and share the order, you will be able to see their quantities even before you go into the call

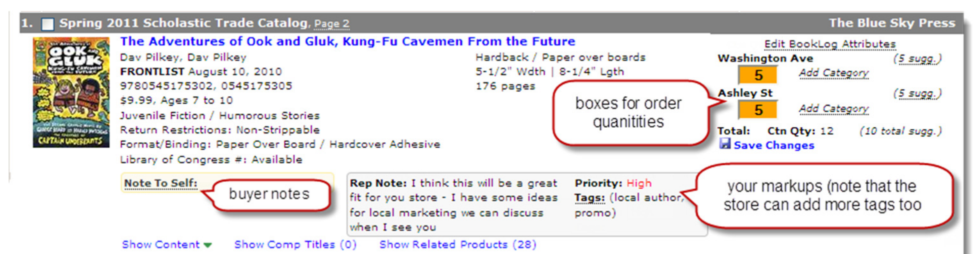
"The length of the actual sales call can be much shorter than it was with paper catalogs, but it is a far more productive meeting. I then have more time to walk the sales floor – reviewing sections, the Staff Picks area, getting to know the store and staff better. *Ann Kingman (Random House) in Bookselling This Week, July 29, 2010*

- You may or may not have connectivity onsite – many reps have wireless cards for internet access almost anywhere, and other will look over the shoulder of their buyers. Usually the buyer will enter the order quantity so you won't need to take the order if you are not connected. However, if you prefer to do that or just want to be prepared for anything, there are options:
    - If you are online, and the buyer is not using Edelweiss, or not recording the order in Edelweiss you can create a 'rep order' to record order quantities yourself
    - If you are online, and you want to *compare* the buyer's final Edelweiss order to the numbers they tell you verbally, use the suggested order field to record quantities for comparison
    - If you will be offline, export the catalogs to an Excel file (Actions->Export) first, then mark order quantities in the Excel file when you are in the sales call
    - Save the complete catalog(s) to PDF files so that you can review them onscreen if you cannot access the internet

Retail Version Demo – Key Points



- Browse by publisher
- Can create **worklist** of catalogs to work next
- New markups are **flagged**
- Entry boxes are for stores orders, your suggestion will be to the right
- Retail view of the catalog I shared earlier
- Create order
- **Your note** in this case is the store's own note
- **Tag cloud** – groups titles by tag
- **Geosearch** – a way to discover titles based on author location
- **Browse by title** – group titles by publisher, age ranges, subject, pub date, (subrights, imprint)
- **Write reviews** – user reviews will be vetted by someone at your company before becoming public in Edelweiss



Wrap-up

- Sale reps – go ahead a start working on a markup to get familiar with how things work, and gather questions for follow-up training sessions
- Experiment, have fun. You can't break anything.
- Visit our **help** site – it can be reached by clicking ***help*** in the upper right of any screen in Edelweiss.
- Or visit www.abovethetreeline.com
- Or, contact us with questions
    - via www.abovethetreeline.com
    - or email support@abovethetreeline.com
    - call 734 996 2730
    - Or via CONTACT US at the foot of the Edelweiss screen