Getting Started with Treeline 2.0

above THE TREELINE®

Account Management Overview

Last updated 8/29/08

Contents

INTRODUCTION

## ACCOUNT MANAGEMENT IN ABOVE THE TREELINE 2.0

Welcome to Above the Treeline! This document was designed to help new Treeline publisher users to get familiar with its Account Management features. Please note that this document covers only the Account Management area, which includes the features normally used by sales reps to manage individual accounts.

Contacts and Help If you have any problems, questions, or would like a training session, please contact us at support@abovethetreeline.com or 734 996 2730

The account management tools in Above the Treeline will give you access to see up-to-date inventory and sales data at your accounts, as well as across markets – either the market of all Trade Indies, Christian Indies, or both. Publishers that are participating in our National Accounts program may also have access to some national account as markets too.

HOME PAGE AND GENERAL NAVIGATION

This is the home page for the Account Management View.
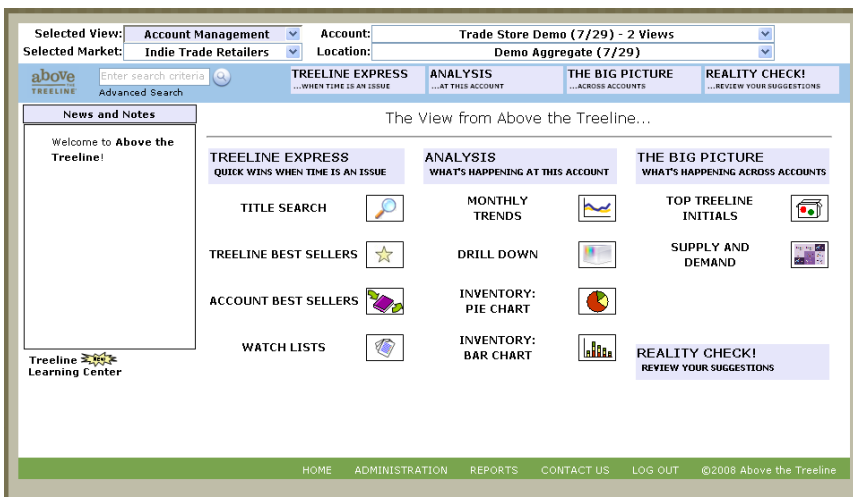
Logging In: Since Above the Treeline is in online program, there is no software to install. All you need is an internet browser, such as Internet Explorer or Firefox, running on a computer with a connection to the internet. Once you have a login, go to http://view.abovethetreeline.com enter your login information and you will land at the new Above the Treeline home page.

Navigation: All the features in Treeline 2.0 are accessible anytime from anywhere using the upper blue navigation bar. This menu stays static as long as you stay in the Account Management view, and the upper section for selecting stores, and the lower green bar with administrative and basic navigation links will remain too. The center of the home page is also a menu to get to the same features that the blue menu items also take you to: Treeline Express, Analysis, The Big Picture, and Reality Check.

Store Access: Stores that are on Above the Treeline have the option to "enable" Treeline publishers. All stores that have elected to enable your company will show up for the administrative users, and can then be assigned to individual reps, which will make the store appear in your drop-down list at the top. If you do not see your account in the drop down list, please contact the Treeline administrator at your company.

TREELINE EXPRESS | when time is an issue

TITLE SEARCH

Summary	Search for Titles – including by BISAC category; imprint; price; series; format; and pub date.
Retailer Version Equivalent	"Title Search"

Title Search is a way for you to search for items either by item code, title keyword, author, or various other filters or combinations. Once you have found the item you are searching for, you can see the full bibliographic, stock, cross-store sales and various other aspects of the item on the product detail page.

You can search for products that are not part of your line by ISBN only, however you will not see the individual store sales and inventory detail for titles that are not coded to your company. If you search for by ISBN, your search result will take you directly to the title detail page. Please see further in this document for more information on the title detail page. If you search by other criteria, the search results (up to 500) will appear as a list in a pop-up window, which is ordered roughly by Treeline sales. As with other title pop-up like this there are various features available here, such as an export to Excel. You can click on an ISBN or SKU to get to the title detail page for more detailed information.

The keyword searches restrict you to only your products, depending on the drop-down filter option for Supplier. You may have only one name there but in some cases there are different divisions of your company broken out into separate "suppliers" so make sure you have the correct option selected here if you have more than one.

TREELINE BESTSELLERS

Summary	Bestsellers across a given market, and compared to the stock at this account.
Retailer Version Equivalent	"Market Top Sellers"

Treeline Bestsellers lets you easily see, and generate, a ranked top-sellers list of titles based on sales activity across all Above the Treeline stores and see whether or not the account you are looking at is stocking the title. You can quickly gauge the stock availability of the titles on the list by means of a color-coded key.
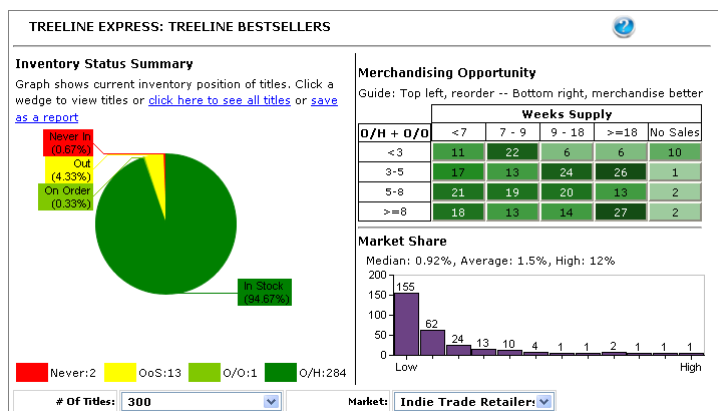
Dark Green – in stock
Light Green - out of stock but on order
Yellow - out of stock and not on order
Red - not stocked at all*

(*since this store has been part of Above the Treeline)

This simple scheme gives you a quick and easy way to check the selected store's availability against your top selling products. To see the store's out of stock or never stocked titles, click on the yellow or red segments of the pie chart. To see all titles, click on the click here to see all titles link. Make sure you select the number of titles to see, and the market to base the bestsellers on.

You may have access to one market (either Indie Trade Retailers, Indie CBA Retailers) or both of these markets. In some cases, you will see many more markets if we are processing national accounts data for your company. Remember that the selected **Market** at the lower part of the screen defines the group of stores that the Bestsellers are created from, but the store market selector at the top of the screen is a way of picking an individual store to compare to the Bestsellers in the market below. So, depending on the market options available to you, you may have a store selected at the top that is within the same comparison market, or a store that is not included in that market.

There are also a myriad of options for filtering lists by binding, category, and so on so that you can narrow down the bestsellers to other groups. Once in a list, you can also click on a SKU to research an individual title in more detail – both the rich bibliographic details and availability of the title, and in-depth inventory and sales information for the selected stores, and a cross-store view of sales and inventory at all stores.

The list can also be used to identify individual items that you want to recommend to the store to purchase or stock up on. Use the Qty field on the far right to recommend a stock quantity (Note, this is not necessarily the same as a buy quantity, but instead the total units you would like to see the store have on hand). Any quantities you save here will immediately appear in the **Buys & Returns** area of the store's own Treeline site.

The Treeline Bestsellers summary page also summarizes the bestsellers to show the merchandising opportunities and low stock situations, given the amount of inventory and rate of sales at the store – these are shown in the Week's Supply grid in green. The Market Share bar chart below that summarizes the bestsellers at the store to show the average market share percentage that this stores has for these titles overall (as well as the median and highest), and breaks the titles out into groups from low on the left, to high market share on the right. This may help you to pick out an unusual title that is performing particularly well at the store.
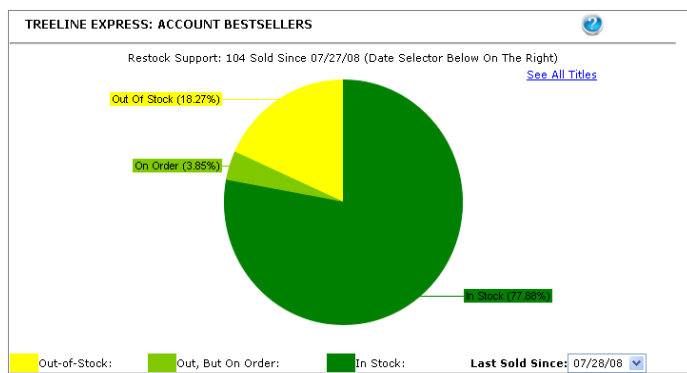
ACCOUNT BESTSELLERS

Summary	See all your titles that have been selling at this account
Retailer Version Equivalent	"Restock Bestsellers"

Account Bestsellers presents a summary of recently sold items in the store divided up into three color-coded segments that

represent the store's stock position for your titles that have sold since a certain date.

Clicking on See All Titles (or any pie segment) will pull up a list ranked to show your titles that have sold in the greatest quantity at this store at the top. The sales quantities showing will be a total for each item over the Time Frame (lower left) you had originally set. But the criteria to be included in the report is just whether an item has sold since the **Last Sold Since** date, you set in the lower right.

So besides presenting the bestselling items in the store, this feature also shows which of your titles the store sold recently (in the last week, or few days for example). You'd use this just to review their bestselling titles, or, to find out what they have been selling recently. Commonly reps use this to see what the store is out of stock on.

Clicking on the yellow wedge of the pie chart will open up the list of the store's out of stock titles, like this. From there you can make suggested buys for titles you think the store should restock if you like.

If you enter a quantity in the QTY field, then save changes, your suggestions will appear in the Buys & Returns area of the store's Treeline site immediately. Items towards the top of your list are more likely to be needed at the store (and they may well already know that they are out of stock). The items towards the end of the list are selling in the lowest numbers, so in some cases may not need replenishment at all.

WATCH LISTS

Summary	Create any list of titles, and track the list at your accounts
Retailer Version Equivalent	"Watch Lists"

Watch Lists are a collection of items that someone wants to track in Above the Treeline. You can keep them private so that only you can see them, you allow anyone at your company to see them, and you can share them with specific accounts or with all or no retail accounts.

Watch Lists in Above the Treeline are much more than a simple list of titles.
Dynamic: Watch Lists match the group of titles up with up-to-date sales and inventory status of either individual stores or groups of stores in aggregate.
Powerful: any list you have access to can be applied as the data underlying the analysis of any tools available on Above the Treeline by using it as a filter.
Flexible: you have control over access to Watch Lists, and lists are easy to create, edit and manage.
Collaborative: Watch Lists are a powerful way for you to share information with your retail accounts and take a collaborative approach towards optimizing their selection of your titles.

To get started, create a list using the area at the foot of the screen. You can then paste a list of ISBNs then also add titles as you come across them in Treeline them if you like too. Please refer to the help documents on the Watch List page for more detail on creating and using Watch Lists.

We recommend creating Watch Lists for promotions, catalogs, or any group of titles you wish to share with one of your accounts, or monitor at one (or several) of your accounts. Ideally, promotions and catalog lists would be posted by someone at the home office, and opened up to all the users at your company, and to the retailers that they apply to. But you as a rep can also post promotions or new title catalogs if there is no Treeline user assigned to doing this internally.

If you create a list for a specific account to review, you can let them know to find the list under Watch Lists in their version, and to select your company as the "supplier" to find the list on the page. Stores have Watch Lists that they create, and that some other retailers create, that Treeline creates, and all the Treeline publishers create – so new lists are not as obvious in their Watch List page since they may have hundreds of them.

ANALYSIS | what's happening at this account

MONTHLY TRENDS

Summary	Review up to 36 months of sales, turn, and inventory for your titles at this account
Retailer Version Equivalent	"Trends"

This page shows you a group of four simple line graphs that allow you to review past and current sales, inventory, turn, and percentage of the selected store's sales and inventory of your product for up to 18 past months.
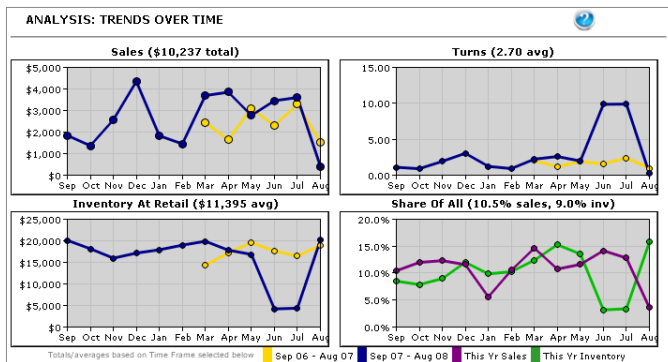
In the first three charts, the blue lines represent the last 12 months, and the yellow lines the 6 months before that. You can point to a dot with your cursor to see the actual value represented in any given month. In the sales graph, you can click on any data point to see a list of the actual titles that the store sold that month.

Totals:
For example, in the image here, the sales total shows as **($10,327) –** which is the total sales at retail over the period you had selected in the **Time Frame** selector in the lower left. The values after the **Turns** and **Inventory at Retail** and **Share** headings are averages, also over the same **Time Frame**.

The fourth chart:
The chart in the lower right by default shows the monthly history of your product in terms of the percentage share of overall store sales and inventory that your product represents in the store. So in the example, it looks like your titles represent 10.5 of the store's sales (on average) and 9% of inventory. The color coding is different because one line (green) represents inventory percentage, and one line (purple) represents sales percentage over the course of the same 12 months. When a store has sales percentages that are consistently much higher than inventory percentages for your product, you could argue that there is room for them to carry more of your product, and less of someone else's.

If you also select a category or a filter such as format, the fourth chart will do slightly different calculation, and will instead show you the percentages as a share of the overall category/format at the store. So you could pick fiction, and then for example see that at this store, your product makes up 15% of their fiction category in sales, and 25% in inventory. If you do select a category, the heading on this graph will change to read "Share of Fiction" or whatever category you applied. If you select another filter, the same thing will apply except the header only refers to category. So you could pick the hardcover format, and fiction as a category, and this graph would show your hardcover fiction as a percentage of the store's overall hardcover fiction.
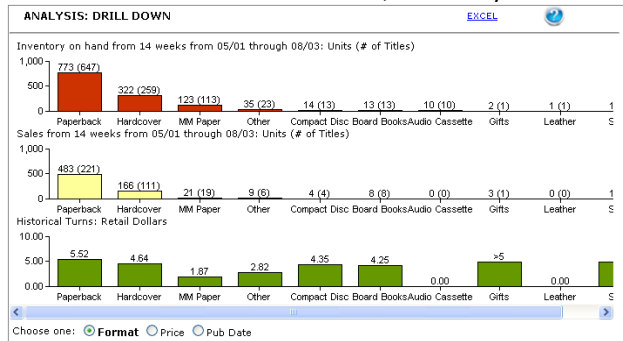
DRILL DOWN

Summary	Slice and dice store stock of your titles by format, pub date, or price point.
Retailer Version Equivalent	"Prism"

Here's another way to dig into an account's inventory. This is something you could use to compare the performance of titles with various formats to each other, and easily see which format has the best turn, best sales, or highest inventory at the store you are analyzing. You can click on any of the bars charts to view a list of the titles behind the analysis. From the list of titles you can make suggestions on what titles store should return or bring in to improve turns, for example. As with other charts like this, you can click on any colored segment of a graph to see the titles it represents.

INVENTORY PIE CHART

Summary	Review the store's on hand inventory of your product
Retailer Version Equivalent	"In Stock Pie Chart"

This chart shows the account's on-hand inventory of your titles – segmented into three sales levels. The red pie wedge always represents the on-hand items with the lowest sales, the beige is the middle group by sales, and the green are the highest selling items. The sales levels that these actually represent can be adjusted by you.

The sales period that this represents in months is also adjustable using the Time Frame selector.
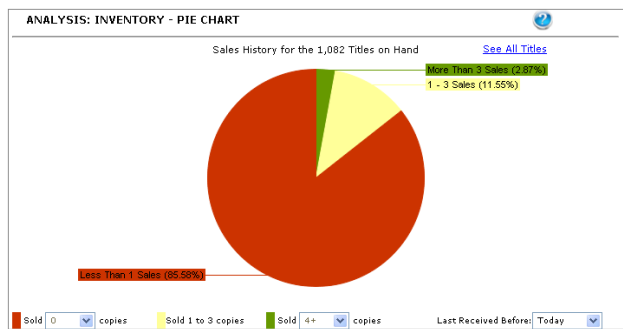
The value of this particular chart is that you can get a quick visual map of how your stocked product is selling in a store. From here you can pinpoint the actual titles represented in a segment by clicking on the colored part of the pie, or on the color-matched labels that point to each segment. The resulting list of titles includes the cross-store percentages of sales and stock that are common to other titles lists, and helps you gauge the status of each title across the Treeline community.

Practically, this is a really good way to see and get at titles that maybe overstocked and could be recommended for return. You can mark the standard title pop-up list of items with a quantity to return down to (for example, 0) and the store will also see this along with your recommended buys in the Buys & Returns area in their Treeline site.

INVENTORY BAR CHART

Summary	Summarizes all of your inventory in the store, based on depth (stock levels)
Retailer Version Equivalent	"In Stock Bar Chart"

This bar chart is similar to the **Inventory Pie Chart**, but it separates the store's inventory further by adding the dimension of stock level – and it includes items that are out of stock too. It is also very useful for identifying overstock. There is a bar representing five stock levels: the default is zero units on hand; one on hand; two on hand; three on hand, and more than three units on hand. If you are looking at the aggregate of a group of stores in a chain, you may need to adjust these increments to be larger.

Each bar stack is divided into three color-coded sections that represent the three sales levels within that group of titles. Like the pie chart, the three sales levels are color-coded red, green, and beige. The red section is always zero sales, but the sales level represented by the other two colors can be adjusted by you. The green segment always represents the group with the highest sales. The sales period that this represents in months is also adjustable.
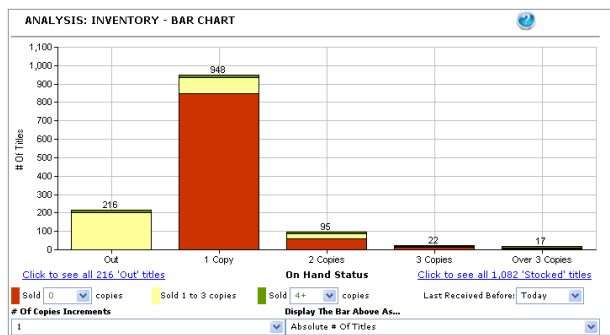
Like the pie chart, various filters can be applied to the section of the store you are looking at. You can also click on any section of a bar stack to bring up all the titles that it represents in a list, and research the titles in more depth—seeing the full bibliographic details, cross-store inventory and sales history, and so on, as well as the option for adding a desired quantity to post to the store's buy/return list.

The Inventory Bar Chart allows sales reps to pinpoint down to titles, a store has a number of copies of, and that have not sold. It also allows you to see titles that the store sold a number of copies of, but doesn't carry anymore.

THE BIG PICTURE | what's happening across accounts

TREELINE TOP INITIALS

Summary	Review average and total new title orders across the market, and compare against to the selected store's orders for those titles
Retailer Version Equivalent	"Top Not Yet Released"

The **Treeline Top Initials** feature is similar to the **Treeline Bestsellers** list, except it ranks forthcoming products based on the percentage of stores that have the item on order, and shows the average on order quantity across the industry.
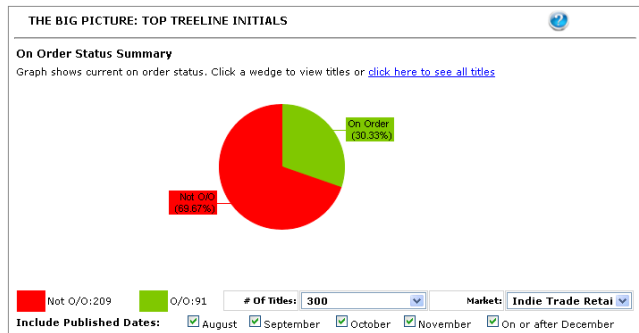
This is a way for sales reps to quickly get a feel for how the community of Treeline buyers is approaching the new season's titles to help you make suggestions to the stores buyers. You easily see what is on order at the selected store and what is not by means of the color-coded key. In this case there are only the options of light green, or red, since these titles are not yet released so should not be in stock or previously stocked.

SUPPLY AND DEMAND

Summary	Shows a big picture of your titles across the market – sales and inventory
Retailer Version Equivalent	"Panoramic View"

This is one of the most powerful features in Above the Treeline, and it is a good way to review the general state of your inventory levels and sales in the marketplace. This can be either as a group within the context of the market you're looking at, or compared to an individual store. What is does is summarize your titles (or a subset of them, if you filter) by the dimensions of percentage of stores that are stocking the titles, versus the percentage of stores that are selling the titles.

There are two variations of the **Supply and Demand** chart – single store or whole market- both versions divide up the titles
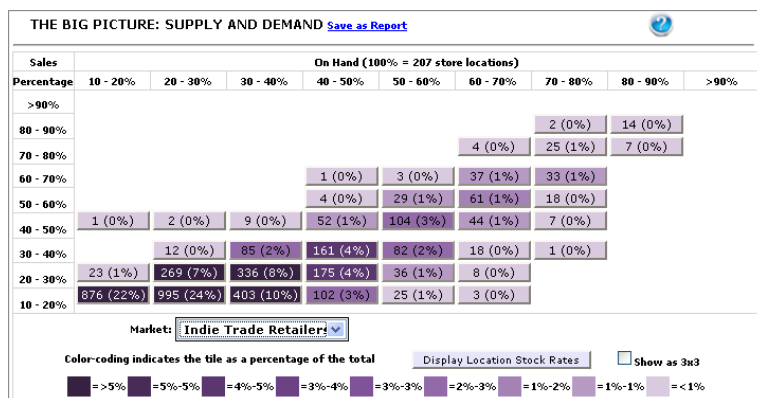
based on the percentage of stores that stock or have sold the title within the time frame, but one expresses the results as a number of items and overall percentage (of your titles) that the tile represents – this is the purple version depicted here. The darker the color the more titles are in that group. To toggle to the store location version, use the blue button below the chart to switch between "location stock rates" and "percentages in tiles." This will show you the same number of items in each tile, but the color coding and numbers in parenthesis indicate how many of the titles that the store has in stock.

You can also elect to show this graph with fewer tiles by clicking on the Show as 3x3 box. This version also includes text on these larger tiles describing the characteristics of the titles in that group – such as "high stock rates, high sales."

REALITY CHECK | review your suggestions

REVIEW YOUR SUGGESTIONS

Summary	Review all your recommendations for buys, or returns for the selected store.
Retailer Version Equivalent	"Buys & Returns"

Instead of just bringing up a title list with all of your suggestions, this feature generates bar charts based on what you have suggested as a buy or a return, so that the dollar value (or units) of your purchases (or returns) is summarized. You can get to the titles by clicking on any of the bar charts – and the title list will pop up allowing you to review or adjust your suggestions.
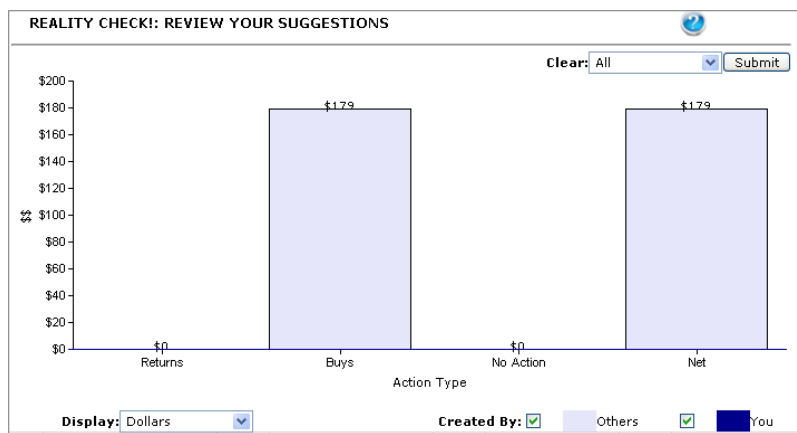
This title list can also be printed, exported to Excel, or emailed to your account. Depending on the POS system your account uses, you may also create and then email a file that the store can easily import into their POS system.

However, the suggestions you make will all also automatically appear on the store's Treeline site in their Buys & Returns area. From there, the store can also edit the list, then export the suggestions to a file for import into their POS system.

Since your recommendations are immediately posted to the store's version of Above the Treeline for their review. We advise that you also contact the retailer to inform them that there are new recommendations to review.
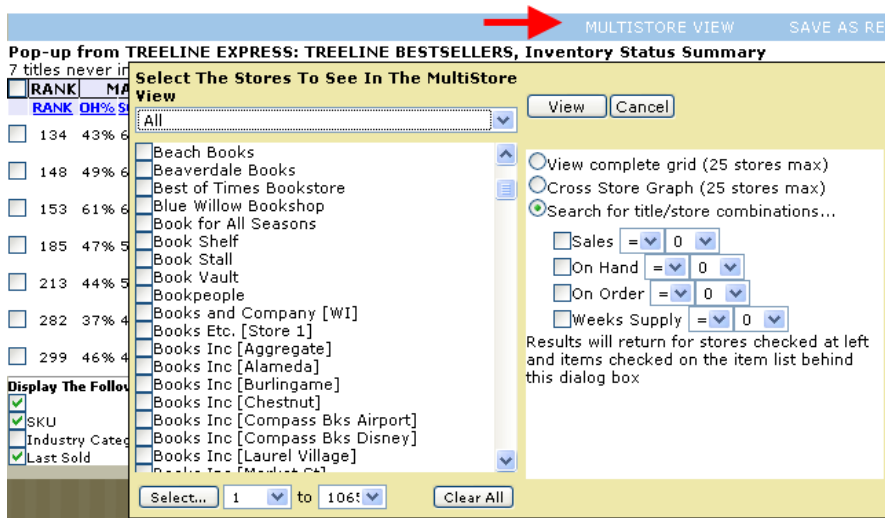
OTHER USEFUL FEATURES

REPORTS
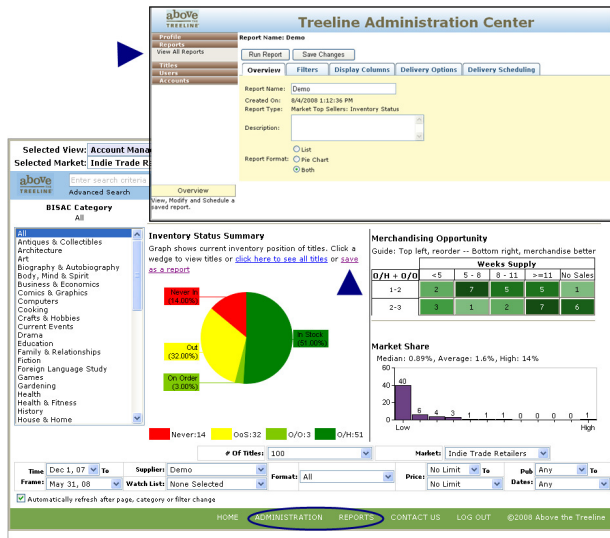
You can create reports from the *Treeline Bestsellers* and the *Supply and Demand* feature by clicking Save as Report. We are working on making this report feature available to you on every main page in Treeline.

The new report function allows you to set up as many customized reports as you want and send them out to email recipients, including yourself, to get these into your inbox for you or other colleagues – maybe other colleagues that may not log into Treeline. Emails can be sent on a regular schedule, which you can define through the administration area.

MULTISTORE VIEW

From just about any title list in version 2, you'll see a new option along the top – "Multistore View":

Option 1: View complete grid
In this option, you must select some stores, then click view, then the inventory position and sales at each of these stores for all the titles on your list will be shown in a new report.

Option 2: Cross Store Graph
For this version, you must select certain titles from the list behind, and certain stores. The result will be a bar graph analysis showing the percentages of those titles that are in stock, out of stock, on order by the standard color coding. This is a way you might want to review the status of titles on one of your Watch Lists at your accounts.

Option 3: Search for title/store combinations
This allows you to identify certain stores based on inventory and sales criteria that you set, for example to show which stores are out of stock in a particular hot title.

For a small title list with a few stores, you'll see the results in a standard Treeline window; if there are many titles and/or a lot of stores, you'll get a message that the results are too big for Treeline and the report will be opened in Excel instead.

TITLE DETAIL PAGE

This is the detailed page you arrive at when you click on a sku from a list of titles. There are four variants on this (the **Map** version is shown here):

Product Info: Detail product info, including expanded bibliographic data and current wholesaler availability.

Cross-Store: All accounts in the market, with names for those that have enabled you (otherwise, their region) showing inventory and sales.

Trends: See the monthly sales, inventory, and turn trends at this account separately, and all accounts in this market combined.

Map: Supply situation in Treeline stores mapped out by state.

You can toggle between different accounts and markets using the drop-down selector at the top of this page. You can also find another item to review by typing in the sku.

The green area in the upper right shows a summary of the inventory (percentage of stores on hand, and actual units); on order (percentage of store that have it on order, and units); and sales (by percentage and units) within the time frame you were originally using. You can then change this to instantly recalculate sales based on 1 to 12 months back instead.

TREELINE ADMINISTRATION CENTER

In Treeline 2.0 you can access the administrative section from every major page by clicking on *Administration* in the lower green navigation bar. You do not have to go back to the home page anymore like you had to do in the old version.
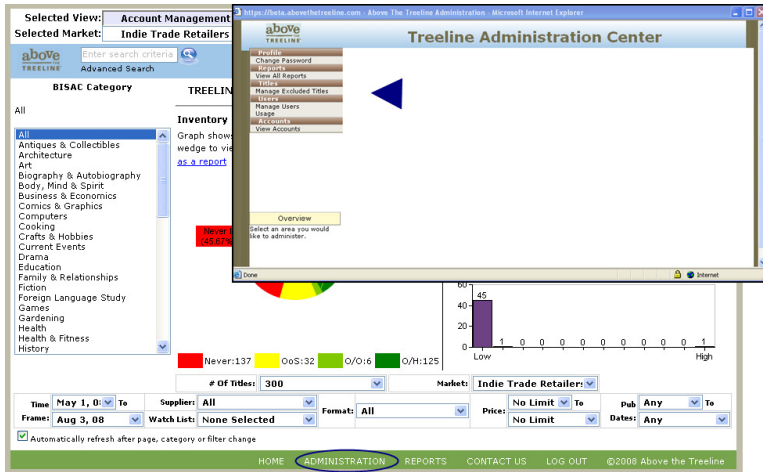
In the Treeline Administration Center you can change your password, review and edit your reports, manage excluded titles, if you have administrative access, also manage users and assign accounts to Treeline users.

QUICK SEARCH

The box at the far left of the upper blue bar is the *Quick Search*, which you can use to do a product search. You can type in

one keyword from the title or author name, then press enter or click the search icon, and a new title list pop-up with the results will be displayed when the search is complete. Or you can search by ISBN-10, ISBN-13, or by partial ISBN. The partial ISBN must be at least the first five digits of either an ISBN-10 or ISBN-13.

You can also reach the standard version of the title search screen by clicking the link for *Advanced Search*

USAGE TIPS

FILTERS

In the new Above the Treeline navigation scheme you will find the same basic page layout for all major features.

The filters are the set of drop-down options at the foot of the page to select a format, price range, and so on.

The category selector on the left allows you to filter your results by the industry -standard BISAC categories. You can drill down into the sub categories by using the links that will appear at the top when you select a main category.

Time Frame

The Time Frame selector in the lower left of most screens is an important feature to be aware of. It is in the area with other filters, but is not technically a filter, but instead usually is a factor in many of the calculations that make up the graphs, charts and title lists you generate. For example, the meaning of "sales" (including percentages of stores that have sold an item) in Above the Treeline almost always means "sales within the Time Frame." For example, if you are looking at top selling titles for the last month, the results will be very different from the results for the last 12 months. Also, any average inventory figures are based on the averaged inventory over the specified Time Frame. Turn numbers are also based on the average inventory and sales during the same Time Frame.

TURN CALCULATIONS

Turns in Above the Treeline are always represented as an annual turn number, even when based on a time frame that is not a year. So, if you are using a time frame of two months, for example, the turn number will be extrapolated out to 12 months so that it is a meaningful number that can be compared with other turn numbers.

TITLE LISTS

Treeline 2.0 sports a new look and feel to the title list pop-ups that appear when you click to get any list of titles. They are divided into three sections – market information, bibliographic information, selected location information, and action column. The selected location information appears on the right side of the list, bibliographic information in the middle, and the Treeline community information is on the left. You will find a description of all the filters you have selected at the top of the title list pop-up.

Action Column

The action column, which you'll find all the way on the right hand side of any title list, replaces the *Sug. Qty* field in the old title lists. Just like in the old version, here you can mark titles you want your account to either purchase or return. The number you enter into the **Action Column** should be the actual number of units that you would like the account to ultimately have in the store. For example, if a store has 9 copies and you want them to return everything; you would put a 0 in the desired quantity. This will generate a buy/return quantity of -9. The advantage of this approach is that if a store does sell or the on hand quantity changes for any other reason, and the list is still active in Treeline, then the pick quantity will adjust to reflect how many the store has to return or buy given its new inventory position. You can review all of your suggestions in the *Review Suggestions* feature.

Sorting

You can sort by any column by clicking on the blue underlined header name. After you have sorted by a column, you will see a small arrow next to the column heading. An arrow pointing up indicates the sort is ascending and a red arrow pointing downward indicates a descending sort. To reverse the sort on any column, simply click on the column heading again.

Email

All title lists have an email option at the top, so that you can send the contents to a customer or to anyone else. The small envelope icon will bring up a list of the email addresses at the account you have selected.

You can also export any list to Excel as well.

NAVIGATING YOUR ACCOUNTS

The navigation from one account to another is slightly different but much easier in this version. The top navigation bars in the new version allow you to toggle back and forth between different accounts at any time in any feature.

The **Selected Market** allows users to select the markets the individual account is in. Once you have selected the market, the **Account** drop-down on the right hand side will populate with all the individual accounts you have access to. From there, you can select the individual account you want to look at in more detail. The date in parentheses right next to each store name reflects how up-to-date the account information is. If you select an account with multiple stores, the **Location** drop-down will allow you to look at a particular location within a multi-store group. For multi-store groups, there is normally an "aggregate" store, which is a combination of all the stores in the group. If you select that store, everything will be based on the totals, such as total on hand, total on order, most recent last sold date at any of the stores, and so on.

POP-UP WINDOWS

Some things that you pull up in Above the Treeline will launch a separate pop-up window, which you can just close when you are done. Or you can leave it open and still navigate to another part of the program.

Most of the main pages open to show you some kind of summary of a group of titles in a chart or graph, and elements of these that represent a group of titles can be clicked on to create a pop-up window with a list of all the titles represented on that part of the chart. If you leave the window open, then click to pull up a different list of titles, the first window will delete the titles from the previous list and repopulate with new titles.

REMEMBERING YOUR PREFERENCES

Above the Treeline uses cookies, which are small files left on our servers to store preferences for each user. This means that if you select a particular account to look at, it will remain to be selected until you select a different account, even if you log out from Treeline, then log back in.

Also, when you select a category to review for one of your accounts in an area, such as Trends, you can then click on the menu to jump to another area such as the In Stock Pie Chart, and it will automatically create the graph based on that same category and filter combination. Most main functions in Treeline have the same category selector on the left of the page, and the same set of filters in the lower section of the page, as shown below. This is helpful if you identify a problem category in one area at one of your accounts that you want to look at in more detail in another area.

Note: Because of the way that these preferences work and for other technical reasons, we strongly recommend that each person that wants to use Above the Treeline has their own Treeline login, and that you avoid sharing them. As a Treeline customer, you may have as many logins as you need. Please contact your internal Treeline administrator to have new logins created.