### Support Ticket Categories

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Ed. Services Leads**                | • School or library leads you receive, that need to be forwarded to the listing consultant  
                      | • Any school or library that is looking for a local ESR                      |
| **Ed. Services Processing**           | • Orders that contain or need processing/cataloging (on selected books in the order)  
                      | • Status check of orders with processing                                      |
| **Ed. Services Vendors & Bids**       | Requests for UBAM Educational Services to complete vendor registration and bids as required |
| **Ed. Services Orders**               | Questions about tax exempt forms, Purchase Orders, Purchase Agreements, etc. |
| **Ed. Services Listings**             | Updating listings information (such as address changes, phone number changes, etc.) |
| **ESR Certification**                 | Questions about the certification/recertification process                     |
| **Ed. Services Billing**              | Questions about a discrepancy on the invoice received by a school or library that does not include missing or damaged books |
| **Ed. Services Disputes**             | • Orders placed by another consultant or ESR for your listed school            
                      | • Listed accounts that are requesting to work with another ESR                
                      | • School or library violations about booths, listings, etc.                    |
| **Ed. Services Missing/ Damaged/Wrong** | S&L Direct Orders, BF, CFAC, RFTSI!, and LFL Orders that have missing, damaged, or wrong items in the order. |
| **Ed. Services Half-Price Replacement** | To replace worn & loved books for schools & libraries                           |

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**My Consultant ID:**

**My Educational Services Web Address** (ConsID.ubamlibrary.com):

**My Team Leader is:**
WELCOME

We are delighted you have committed to become an Educational Services Representative (ESR) with Usborne Books & More, a division of Educational Development Corporation (EDC).

The educational market consists primarily of schools; including elementary and high schools, and also public libraries, which traditionally have been serviced by large jobbers.

Several years ago we decided that our Company and schools and libraries would be better served if we had a direct sales force committed to representing only our products in the educational market, and the opportunity was offered to our Usborne Books & More Consultants to become ESRs. We have had great success with this program but in more recent years the Internet became more prevalent, and products became a “commodity” with price being the dominant factor. Our ESRs personally presented our products only to see them purchased elsewhere. I strongly believe that “Whoever makes the sale must be compensated;” and this was not happening. A few years ago we began the process to eliminate the wholesale and jobber accounts that were undermining our Company representatives.

Again, we feel our Company and our products are better served by you, our ESRs, as you have many more services and programs to share. We offer Book Fairs, Cards for a Cause Fundraisers, Reach for the Stars!! Reading Incentive Program, Literacy for a Lifetime Grant Matching Program as well as direct sales to schools and libraries; our full service programs are not offered by jobbers or wholesalers.

Librarians sometimes have felt it was more convenient to order from jobbers, but we feel it is important to have a direct representative from the Company who can develop a relationship and establish the needs of educational organizations. We have award-winning products with Usborne Publishing recently named Publisher of the Year, and many Kane Miller titles have received individual recognition. We are not content to wait until our products are discovered in a wholesale catalog.

What this means to you is that you are the direct representative to the educational market of the entire array of our products and services, many of which you will be the sole-source supplier. It is an incredible opportunity, but with that comes responsibility. As an ESR you are required to list the institutions and then contact their various departments to present our entire program. If you are unable to comply with these requirements, you should unlist the institution and allow another Consultant the opportunity.

I believe very strongly that our philosophy to market to educational institutions through our ESR is the very best for our Company because I believe in you and your ability to professionally represent our Company.

Congratulations for making this commitment and my best wishes for your success. The entire Home Office team is dedicated to supporting your efforts. We believe in you!

Randall White
President and CEO of Educational Development Corporation

OUR MISSION

The future of our world depends on the education of our children.

We deliver educational excellence one book at a time.

We provide economic opportunity while fostering strong family values.

We touch the lives of children for a lifetime.
UBAM Educational Services is a division of Usborne Books & More. This division markets Usborne and Kane Miller books along with full service educational programs for schools and libraries.

Educational Services Representatives (ESRs) are certified to represent UBAM Educational Services by promoting Usborne and Kane Miller products, programs, and services to schools and libraries. You must be an ESR in order to solicit and/or submit any order for a school or library.

HOME OFFICE EXPECTATIONS

When you become an ESR, you become a direct representative of UBAM Educational Services, a division of Educational Development Corporation - a publicly traded company. You are not only representing yourself and your personal business, but also the company. Home Office expects that you do not take this role lightly.

ESRs must maintain a high level of professionalism, including:
• Respecting the time of the school or library personnel.
• Arriving for scheduled visits prepared to conduct business. Bring materials and supplies with you and leave personal distractions at home.
• Dressing professionally, which shows respect for yourself, your contacts, and the company you represent.
• Verifying that a school or library is unlisted before approaching them.

ESRs are expected to provide full-service to their listed accounts, being willing to offer all of our programs and services to everybody at the school or library. For example, do not list a school with the sole purpose of doing their Holiday Vendor Event or a Chess Club’s Cards for a Cause Fundraiser.

ESRs are asked to act in the best interest of the customer, while always considering the impact to the reputation of the company you represent.

ESRs will use the tools and training provided to them while remembering that the school and library market is quite broad. There are numerous rules and regulations across the country, and it is the responsibility of the ESR to find out the specific details of the schools and libraries they are servicing.

Books given at schools as personal gifts to your child’s teachers/school personnel/classmates, by any consultant, other than the listing ESR, cannot in any way link to your personal business, such as a sticker, business card, catalog, etc.

NOTE: You must be an ESR in order to:
• Donate books to a school or library (including classroom donations)
• Donate books to an event that benefits a school, library or affiliated organization
• Host an event that benefits a school, or library or affiliated organization
If you are an ESR and one of the above opportunities arises at a school or library listed by another ESR, you must immediately pass the lead onto the listing ESR via Support Ticket under “Ed. Services Leads”. 
HOW TO GET STARTED:

NEW ESR CERTIFICATION

**STEP 1** Application & Processing
Fee: $50 (non-refundable)
*Includes:*
- Internal Application Processing
- Background Check (includes recheck every six months)

**STEP 2** Training & Certification
Fee: $75 (non-refundable)
*Includes:*
- Online Training
- Online Quizzes
- Certificate (personalized and printable)
- Upon completion, congratulatory email with instructions to purchase kit

**STEP 3** ESR Kit
Fee: $25 (non-refundable)
*Includes:*
- Library Bound Book (1) - value $14.99
- School and Library (S & L) catalogs (5)
- S & L Programs Mailer (5)
- Program Flyers (1 of each) for Book fairs, Literacy for a Lifetime (LFL), Reach for the Stars!! (RFTS!!), Cards for a Cause (CFAC), Reading Box Set Flyer and Early Learning
- Laminated Processing Sheet
- Personalized Educational Services E-commerce Site
- $5 Favorites Flyer

ANNUAL ESR RECERTIFICATION
Fee: $50 (non-refundable)
*Includes:*
- Background Check (includes recheck every 6 months)
- Online Training & Quiz
- Updated Certificate

Home Office will send out an email two weeks before your annual recertification is coming up.

If you choose not to recertify by your annual recertification date, your ESR status will lapse. You will lose your listings and will not be permitted to service the school or library market. If you choose to work the school and library market again after your status has lapsed, you will have to go through the entire process (Steps 1-3) to become an ESR.
PROGRAM OVERVIEW

DIRECT ORDERS

An order unassociated with Book Fairs, Cards for a Cause Fundraisers, Reach for the Stars!! or Literacy for a Lifetime Grant Program.

<table>
<thead>
<tr>
<th>OPTION 1</th>
<th>OPTION 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>COST OF BOOKS</td>
<td>COST OF BOOKS</td>
</tr>
<tr>
<td>Full Retail</td>
<td>Full Retail</td>
</tr>
<tr>
<td>SHIPPING</td>
<td>SHIPPING</td>
</tr>
<tr>
<td>8% or $6 Minimum</td>
<td>Free</td>
</tr>
<tr>
<td>No Minimum Sales</td>
<td>MINIMUM SALES $250</td>
</tr>
</tbody>
</table>

BOOK FAIRS

An event hosted by an organization such as a school, library, hospital, daycare center, etc., that allows the organization to earn free books or cash based on the sales. See chart below for free book allowance.

NOTE: Book Fairs cannot be paid for with a Purchase Order or a Purchase Agreement, only by credit card.

<table>
<thead>
<tr>
<th>FREE BOOK OPTION</th>
<th>eFair OPTION*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum Retail Sales $250</td>
<td>No Minimum Sales on Individual Orders (Minimum Retail Sales for Program Still Apply)</td>
</tr>
<tr>
<td>50% of sales in free books</td>
<td></td>
</tr>
</tbody>
</table>

Refer to training module for examples of how to offer a Cash option.

The cash option is not available with eFair orders.

* On eFair orders where books are shipped with the organization’s books, sales credit and commission are not given until the final order is submitted through Order Pro Online (OPOL).
PROGRAM OVERVIEW

LITERACY FOR A LIFETIME (LFL)

A 50% grant matching program partnering with businesses, foundations, and individuals to support local literacy or non-profit organizations. Donations made to a tax-deductible organization must be paid to the organization, then forwarded to the consultant to place the order in OPOL.

Minimum order: $250
50% of order in Free Books

CARDS FOR A CAUSE FUNDRAISERS (CFAC)

A fundraising program offering boxed card sets sold at $30 each. The organization receives up to $13 for every box sold. UBAM receives $17 depending on the tax exempt status of the organization. Shipping is included.

Minimum order: 15 boxes of cards

REACH FOR THE STARS!! (RFTS!!)

Reach for the Stars!! is a generous pledge-based reading incentive program designed to benefit schools, individual classrooms, clubs, preschools, church groups, home school groups, charities, businesses, and public libraries.

The goal of Reach for the Stars!! is for participants to read, or be read to, for 300 minutes over a two week period, thus developing a reading routine, receiving Usborne and Kane Miller books for participating.

This is an extremely flexible program with multiple options available for the organization to earn books, cash or a combination of both.

Minimum order: $250
Refer to training module for examples of program options.
### SALES CREDIT/COMMISSION:

- Timing of sales credit and your commission payment is based on date of the order posting, regardless of payment type. NOTE: On eFair orders where books are shipped with the organization's books, sales credit and commission are not given until the final order is submitted through OPOL.
- If an order from a listed school or library is received by Home Office from a Consultant other than the listing ESR, sales credit and commission will be given to the listed ESR. If the order was submitted before the listing was received, sales credit and commission will be given to the ESR who did the work to get the order.
- Sales credit given for an order placed for a school or library cannot be transferred to another ESR or Consultant.

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<table>
<thead>
<tr>
<th>ORDER TYPE</th>
<th>MINIMUM SALES</th>
<th>COMMISSION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Order*&lt;br&gt;School &amp; Library Option 1</td>
<td>None</td>
<td>25%</td>
</tr>
<tr>
<td>Direct Order*&lt;br&gt;School &amp; Library Option 2&lt;br&gt;Free Shipping</td>
<td>$250</td>
<td>20%</td>
</tr>
<tr>
<td>Special Programs+&lt;br&gt;Book Fairs, eFairs, RFTS!!, LFL</td>
<td>$250</td>
<td>17%</td>
</tr>
<tr>
<td>Cards for a Cause+&lt;br&gt;Fundraisers&lt;br&gt;CFAC</td>
<td>15 Boxes of Cards</td>
<td>10%</td>
</tr>
</tbody>
</table>

* Personal Monthly Sales bonus of 4% is paid when sales from eligible order types reach over $1000.
+ Sales from these categories are not included in the calculation for the Monthly Personal Sales Bonus.
LISTING SCHOOLS OR LIBRARIES

A listing system is in place to prevent multiple ESRs from contacting the same school or library over and over again and to protect the company name in this professional market. It is required to review all listings prior to contacting an accredited private or public K-12 school, or public library. If the account is listed, you are not permitted to contact them.

Policies:
1. You are considered an ESR once you have completed the 3 steps outlined in the certification process on page 5 of this guide, and maintain certification annually.
2. You must be an active Consultant. (ESR must maintain $500 in sales of any kind, including party and web sales) in the previous 3 months to be considered active OR be within your Incentive Period.
3. Schools and libraries listed by an ESR must be within a 150 mile radius of their address on file with Home Office.
4. ESRs may only list accredited private or public K-12 schools and public libraries.
   • Each school or library may be listed by one ESR.
   • Daycare centers, preschools, hospitals, or any other organization cannot be listed, even those that include a kindergarten program and are not limited to the 150 mile radius.
5. ESRs may service unlisted schools or libraries until they become listed by someone else, with the exception of unlisted branches of listed public library systems.
6. If more than one ESR applies to list the same school or library, Home office will process the listings in the order they are received, as long as the ESR has met all the requirements to receive a new listing.
7. Order Credit: If an order from a listed school or library is received by Home Office from an ESR who does not hold the listing, sales credit and commission will be given to the listing ESR. If the order was submitted before the listing request was received, the sales credit will be given to the ESR who did the work.
8. Consultants and ESRs are expected to support and edify the listing ESR in all circumstances.
9. It is unprofessional and unproductive to reach out to a Listing ESR to request their listing be transferred. Transfer Listings should only be initiated by a Listing ESR. If it is determined that the ESR or a Consultant has manipulated the listing or transfer process, Home Office reserves the right to take corrective action which may include revoking ESR certification and/or Consultant status.

Qualifications for listing schools or libraries:

The following order types count toward minimums to list additional school or libraries: Direct School and Library Sales, CFAC, RFTSII, LFL, and BF.

<table>
<thead>
<tr>
<th>Number of Listings</th>
<th>Sales Requirements (between July 1 &amp; June 30)</th>
<th>Listings with Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Active*</td>
<td>0</td>
</tr>
<tr>
<td>7</td>
<td>$2,000</td>
<td>2</td>
</tr>
<tr>
<td>14</td>
<td>$4,000</td>
<td>5</td>
</tr>
<tr>
<td>21</td>
<td>$8,000</td>
<td>12</td>
</tr>
</tbody>
</table>

* ESR must either be within their Incentive Period and/or have $500 in sales of any kind, including party and web sales, in the previous three months.
IMPORTANT INFORMATION ABOUT LISTING SYSTEMS/DISTRICTS

Public Library Systems
Some public library systems have a central purchasing department that buy books for all library branches within their entire system. Orders placed through this system will be credited to the ESR who has the system listed, if applicable.

It is the ESR’s responsibility to check to see if a library system is already listed.

Working with branches of a public library system
• The ESR who lists a public library system may list branches of that system
• Only the ESR who lists a public library system may work with unlisted branches of that public library system.
• Any ESR may list a branch of a listed public library system.

If a public library is not listed or is not part of a system, ESRs may work with them without listing.

Remember when a library system is listed, their purchasing department is already working with an ESR. As a result, your efforts when working with the individual branch should not impede on the relationship or potential sales by the ESR who has the library system listed.

School Districts
School Districts are not able to be listed. In most instances, each individual school has their own funds used to purchase books.

UNLISTED SCHOOLS OR LIBRARIES

An ESR who already has listed their maximum number of schools and libraries can sell and service an unlisted school or library until another ESR lists that school or library. If you would like to work with a branch of a public library where the system is listed, please see the information above.

Remember, servicing an unlisted school or library is risky due to the fact that work done to service a school or library may benefit another ESR. If you are working with an unlisted school or library and, at any point that school or library is listed, then you risk losing scheduled events, sales credit and commission that you have worked for.

• If an unlisted school or library becomes listed within 30 days of a scheduled event, then the ESR that is actively doing the event will complete the event and graciously turn the listing over to the new ESR.
• If an order not associated with a pre-scheduled event is submitted before the listing request is received, the credit will be given to the ESR who handled and placed the order.

If an unlisted school or library that is being serviced becomes listed, the original ESR will graciously work with the listing ESR. Home Office expects that the original ESR will conduct the transition with professionalism and integrity, ensuring a seamless and positive experience for the customer.

LEADS
We know that ESRs will naturally meet school and library personnel during their professional and personal life and through their parties as an Independent Consultant. It is imperative that you treat the school or library personnel with respect and graciously offer to connect them with the Listing ESR. Assure the school or library personnel that you will have their representative reach out to them in a timely manner to meet their needs. All leads should be reported to Home Office through a Support Ticket for “Ed. Services Leads” and further follow up on the handling of a lead is not required. Inquiries about leads or listings should not be posted on Social Media Channels.
LISTING MAINTENANCE

In order to maintain listings, the ESR, must do the following:

Reviewed Monthly:
- Must be an active Consultant. (ESR must maintain $500 in sales of any kind, including party and web sales in the previous 3 months to be considered active.) Personal Sales Tracker is located in Back Office > Educational Services to review up to date sales information in relation to listings maintenance.

Reviewed Annually:
- Must have a minimum of $250 in school and library sales (including CFAC, LFL, Direct Sales, RFTS!! and Book Fair Sales) linked to that account through the drop down menu in OPOL.
  OR
- Consistently add notes on the listed account describing how you are servicing your school, including but not limited to dates of planned events to come, notes about conversations with your contact, etc.

If you fail to meet the above requirements, you will receive a notification that your school or library listing(s) have been removed.

NOTE: The audit year for school and library listings begins July 1 and ends June 30.

If a school or library is not being serviced properly by the listing ESR, Home Office reserves the right to remove that listing from the ESR. ‘Not being serviced properly’ or violating ESR’s ethics and expectations may include, but is not limited to:
- Inadequate relationship building
- Unprofessional presentations or behavior
- On-going communication
- Unwillingness to offer all programs
- Complaints received by Home Office regarding a school account

The severity of the complaint will be reviewed by Home Office. The decision made will be final as to whether the ESR will keep or lose the listing.

Requests from an account to change ESRs will be handled on a case-by-case basis. If it is determined that the ESR or a Consultant has manipulated the request to change, Home Office reserves the right to take corrective action which may include revoking ESR certification and/or Consultant status.

UNLISTING SCHOOLS OR LIBRARIES

ESRs can remove their listed schools or libraries by checking the ‘Unlist’ button located on the right side of the account listed in your Back Office main page.

TRANSFER LISTINGS

ESRs can transfer listings to other ESRs who are within a 150 mile radius of the listing and who meet the sales requirement of an active ESR.

ESRs can transfer their listed schools or libraries by checking the ‘Transfer’ button located on the right side of the account listed in your Back Office main page. The ESR will need the Consultant ID of the ESR to whom they are transferring the listing. Once completed, no changes to the request can be made.

It is the listing ESR’s responsibility to confirm eligibility of the receiving ESR for a listing transfer. If for any reason the receiving ESR is not eligible to receive the listing, the transfer will fail and the school or library will be unlisted.
ORDERING

Orders should be placed in the order type in which the event was advertised. If your event does not match one of the order types available, you may use the most appropriate order type.

In order to receive proper credit toward the Annual Listings Audit, ensure that you use the drop-down menu available in OPOL to credit your listing with the order. This option is available in the Previous Host/Listing field and should be done on all orders placed for your listed schools or libraries.

Remember to consistently update your listings with Account Information Notes as you do events, make contact and place orders with your school or library. This will also be credited toward your listings requirement for the Annual Listings Audit.

WHERE TO ORDER:
School and library customers can place direct orders online via your ESR e-commerce site. (ConsID.ubamlibrary.com).

ESRs can place direct orders for school or library customers on their ESR e-commerce site or in OPOL. Special program orders can only be placed in OPOL.

An account must be created to order online. Either the ESR or the customer can create an account. Multiple online accounts can be created for each school or library, if needed.

PAYMENT OPTIONS:
• Credit Cards are accepted for school or library orders. (Visa, MasterCard and Discover)

• Purchase Orders (PO):
  A PO is a form of payment supplied by the school or library.
  A PO is a promise-to-pay. Home Office will bill the organization after the order has been shipped.
  When using this payment method, an electronic copy of the signed PO must be attached to each order upon submission.

  PO sales must ship to the address listed on the PO.

  If a PO is received at the Home Office from an unlisted school or library without the ESR’s name or ConsID indicated, HO will call the school or library to determine if the order was solicited by an ESR.

  If a PO is received at the Home Office from a listed school or library, it will be emailed to the listing ESR to create and submit the order.

• Purchase Agreements (PA):
  If a school or library does not use a PO for payment, the ESR will need to complete a PA for the school or library to sign.

  A copy of the Purchase Agreement can be found in the Educational Services Tab.

  An order cannot be submitted with both a credit card payment and a PO or PA.
SALES TAX EXEMPTION REQUIREMENTS:

Many of the school and library entities that ESRs will be receiving orders from are Not-For-Profit entities that are exempt from paying Sales Taxes on purchases. It is important for you to understand that the customer’s Not-For-Profit status is based on their income tax status which is completely separate and independent of their Sales Tax Exemption status. Schools and Libraries obtain and maintain their Not-For-Profit income tax status through their federal organizational filings and through the filing of Articles of Incorporation with their state. Sales Tax Exemption is a separate certification process that some (but not all) Not-For-Profit entities and other entities become qualified. As such, it is important for you to obtain the following item from any School or Library Customer that is claiming to be Sales Tax Exempt:

• Sales Tax Certificate – This will allow the customer to be set up in our accounting system as Sales Tax Exempt and their order to be processed without charging sales tax.

Note: If an order is processed before the sales tax certificate is obtained, we will not be able to refund the sales taxes charged on the order. It will be the requirement of the School or Library to file for a Sales Tax Refund with their appropriate sales tax agency. Unfortunately, there are no exceptions to this policy.

SHIPPING TAX EXEMPT ORDERS:

Orders that are tax exempt must ship to the state in which exemption was granted. Orders shipped to the following states will not be considered tax-exempt and will be required to pay tax:

• California
• Hawaii
• North Carolina
• Washington
INVENTORY/CONSIGNMENT

Home Office will loan books to eligible ESRs for the purpose of selling ‘cash & carry’ at an event. The books are shipped free of charge with the expectation that the ESR will pay for the books within 30 days of their event. (see parameters below)

When borrowing inventory, plan to sell it all. Work with your Team Leader or Upline before placing a Consignment Inventory order request to carefully consider your options.

• Consignment orders are not charged shipping initially. Shipping fee is assessed upon reconciliation of the order and is based on the order type.

Qualifications that must be met before you are eligible to receive consigned inventory:
• You must have been with the company for at least (3) three months and outside your incentive period.
• You must be an Active Consultant (having a minimum of $500 in sales in the past 3 months).
• Consigned Inventory must be reconciled (paid for through one of our programs in OPOL) within (30) thirty days of your event.

CONSIGNMENT LIMITS

The amount of consigned inventory you are eligible to receive is based on the amount of time the Consultant has been with the company.

If you have been with the company between:
• 3 – 6 months $1000 max
• 6 – 12 months $1500 max
• After 12 months, the maximum is $2000

Requests for consideration to increase consignment limits will require Home Office approval. Submit a support ticket to Consignment to start the process (this can take 3 to 5 business days).

ORDERING (REQUESTING CONSIGNED INVENTORY)

• Request consigned inventory (consignment) by submitting an order through OPOL. Choose INVENTORY as the order type and then select the titles you wish to fill your order. Books will be entered and shipped at no charge to you.
• For all Consignment orders please allow a minimum of 10 business days for processing, this does not include shipping time. Please include order numbers, Consultant ID’s to all support tickets.
• Consignment requests are not guaranteed at any time.
• Consignment orders are not eligible for expedited shipping.
• There is a $500 minimum for consignment requests.

MISSING & DAMAGED*:

Check for missing or damaged titles immediately. Missing or damaged titles must be reported via support ticket within 10 days of delivery of your consignment order. Create a support ticket. Include pictures of any damaged items. If the total amount of the missing/damaged books is less than $100, replacement titles will not be shipped. Home Office will adjust your consignment balance to deduct the proper amount.

*Damages will be assessed by Home Office. If determined it is necessary, Home Office may request that you return the damaged books.
RECONCILING (PAYING FOR) CONSIGNED INVENTORY
All reconciliation orders are created in OPOL using one of the following order types: Book Fair, party, RFTS!!, or CFAC.

1. Simple Reconciliation
This option is to be used when:
• The inventory being reconciled was consigned to you.
• You are not splitting or sharing sales credit with another consultant.
This process can be completed entirely by you in OPOL. No Support Ticket is required.

2. Reconciliation with Split/Shared Sales
This option is to be used when:
• The inventory being reconciled was consigned to you.
• You are splitting or sharing sales credit with another consultant.
This process requires you to initiate, but do not submit, the order in OPOL and submit a support ticket to “Consignment Reconciliation” for completion of the order.

NOTE: eFair orders that are ‘Ship to Organization’ are not eligible for this method of reconciliation.

Monthly deadlines apply to submission of reconciliation orders. Consultants and Leaders are responsible for checking Home Office communication channels for all important business deadlines. See the Training Module on Consignment/Inventory for instructions to reconcile.

eShow and eFair Orders:
Online orders can be combined with reconciling consignment orders. This feature is only available when you are reconciling through OPOL.

RETURNING CONSIGNED INVENTORY
• A fee of up to 5% ($10 minimum) may be assessed on any inventory that you return to Home Office.
• Returning books from a consignment inventory order should always be your last resort.
• You are responsible for the shipping fee to return the inventory.
• In order to proceed with a request to return your consignment inventory, please submit a Support Ticket and await response for instructions.
PROCESSING
(May also be referred to as Cataloging)

Processing refers to the labels that are on books in a library that allow them to be cataloged and checked out from the library and may also be referred to as cataloging. Attached and Unattached processing is available for school and library accounts.

A processing order form can be found on the inside front cover of the school and library catalog, or under the Educational Services tab in the back office.

UBAM Educational Services offers the following processing services:

• MARC Records
• Barcodes
• Spine Labels
• RFID tags

These items can be ordered in any combination using the processing order form. All products are created through a third party vendor. No sales credit or commission is paid on these processing items.

When a Media Specialist (Librarian) requests cataloging with an order, have him or her fill out the processing order form. He or she should be familiar with the questions and know what they require for their processing needs.

If the Media Specialist does not know their processing information ask them to:
• Provide a list of district specifications (aka specs) - this can sometimes be found on a School District website.
• Make a clear copy of a working barcode from a current title in their library for symbology.
• Enlarge the bar code to at least 8 inches shown in the landscape format.

Once received from the Media Specialist, the ESR should submit these specs via a Support Ticket under the category “Ed. Services Processing”.

HOW TO ORDER:
Attached or Unattached processing orders are submitted through OPOL when the processing items are needed for EVERY book in the order. The order form must be completed in OPOL in step 2. OPOL recognizes cataloging products for all the titles in the order including each individual title in a collection.

Additionally when processing items are needed for ONLY the Free Books portion of a Book Fair or Reach for the Stars!! order, you will submit through OPOL and complete the order form in Step 2.

Attached or Unattached processing orders that require processing items for only selected books must be created in OPOL, but DO NOT SUBMIT. Send the Pending Order # with the processing order form via Support Ticket category “S&L Processing”.

UNATTACHED AND ATTACHED PROCESSING

Unattached Processing
When a school or library orders unattached processing with their books, the cataloging products are sent separately from the books. The customer will receive them directly from our vendor within 2 to 4 weeks after the arrival of the books. The ESR will receive sales credit for the book order after the order is posted by Home Office.

Attached Processing
When attached processing is requested, the items are attached to the books by Home Office before being shipped to the customer. This can take up to 4 to 6 weeks. IMPORTANT: Books with attached processing are not returnable.
REGISTERING USBORNE BOOKS & MORE EDUCATIONAL SERVICES AS AN APPROVED VENDOR

Some schools and libraries require companies to register to be on their ‘approved vendor’ list. The ESR must complete the necessary paperwork from the school or library to register Educational Development Corporation as a vendor with the school district or library system. Registering allows the ESR to be listed as the local sales representative. Without this registration, a school or library may not be able to purchase books. If a signature is required on their paperwork, please upload the form via the Support Ticket category “Ed. Services Vendors & Bids”.

Contact information for vendor registration form:

**Company information:**
Educational Development Corporation  
c/o UBAM Educational Services  
5402 S 122nd E Ave  
Tulsa OK 74146

**‘Remit to’ address for payments:**
Educational Development Corporation  
c/o UBAM Educational Services  
PO Box 258871  
Oklahoma City OK 73125

If your school or library requests a W-9 form for tax purposes, this document can be found in the Educational Services Tab.

BIDS & SAMPLES

**BIDS**
Schools, Districts, or Libraries might require that UBAM Educational Services is on their ‘bid list’ before they will purchase. If this is the case, the ESR will be invited to ‘bid’ for business. The ESR will forward bid paperwork via the Support Ticket category “Ed. Services Vendors or Bids”.

If selected, the information listed on the bid will need to be honored for a fiscal school year.

Schools or libraries may also request bids on specific titles. Please include all information on titles when forwarding bid paperwork via Support Ticket.

**SAMPLES**
Some schools or libraries need to approve products before listing the ESR on the vendor list or before they can purchase Usborne and Kane Miller books. These schools or libraries will need samples of books that are up for approval. The books are non-returnable and kept in a central place at the school or library so that all teachers and media specialists in the district can view and critique the books.

Samples are the responsibility of the ESR to provide.
Active Consultant Status
A consultant who has $500 in sales of any kind, including party and web sales, in the previous 3 months. This status is required for an ESR to be eligible to list, as well as maintain their listings.

Attached Processing
Cataloging products (MARC records, bar codes, spine labels, etc.) that are attached at Home Office before books are shipped to the organization.

Bid
A list of products that must be submitted to an organization with the lowest price available. Other vendors will also submit bids and orders will be made based on this information.

Bindings
- (BD) Board book
- (BX) Box set
- (CL) Cloth edition
- (CV) Combined volume; refers to a compilation of books from the same series.
- (FC) Flashcards
- (FL) Flexi-binding
- (GC) Greeting cards
- (H) Hardback edition
- (HC) Hard Cloth
- (H/L) Hardback/Library
- (HFL) Hard Flexi-binding
- (JB) Jigsaw Book
- (KT) Kit
- (L) Library edition
- (P) Paperback edition
- (PD) Pad
- (SH) Spiral hard

Book Fair
An event hosted by an organization such as a school, library, hospital, daycare center, etc., that allows the organization to earn free books or cash based on the sales.

Cards for a Cause Fundraisers (CFAC)
Consultants can help organizations reach their fundraising goals with our CFAC fundraisers. Participants sell boxed sets of 30 hand-made greeting cards with matching envelopes. Over 40% of the sales come back to the organization in cash. This is well above the average fundraising profit margin.

Educational Services Representative
A consultant who has successfully completed the guidelines put forth by Home Office, including initial application, background check, training, certification and kit purchase. ESR Certification is valid for a 12 month period.

Inactive Consultant Status
A Consultant who does not have $500 in sales of any kind, including party and web sales, in the previous 3 months. ESRs with this status are not eligible to list schools and libraries, and will lose any existing listings.

Jobbers
Distributors of books from multiple publishers (Baker & Taylor, Ingram, Follett, etc.) who call on Media Specialists to sell books to them.

Listing a school or library
The process in which an ESR will submit online listings to be able to exclusively service that school or library.
Listing
A school or library that already has an ESR servicing it.

Literacy for a Lifetime (LFL)
Grants and donations can stretch farther with this 50% grant matching program. There’s no cap amount matched and organizations have full control of the selection of book. LFL can be used as often as donations and grants become available.

Order Pro Online (OPOL)
Online program to enter and transmit orders.

Processing
The labels that are on books in a library that allow them to be cataloged and checked out from the library. May also be referred to as cataloging. (Barcodes, spine labels, MARC record, etc.) (See Attached/Unattached Processing)

Purchase Agreement
A document originated by the home office that the ESR can provide to the school or library. This document is used as a form of payment in the absence of a purchase order when the school does not provide one. The order cannot be processed without this form.

Purchase Order
A document originated by the purchasing organization used as form of payment received from the purchasing organization that permits for Home Office to ship the current order and invoice the organization for the amount noted on the Purchase Order. The order cannot be processed without this form.

Reach for the Stars!!
Reach for the Stars!! is a generous pledge-based reading incentive program, designed to benefit schools, individual classrooms, clubs, preschools, church groups, home school groups, charities, businesses and public libraries.

Tax Exempt Certificate
State document used by organizations to be exempt from paying sales tax on purchases.

Tax Exempt Status
Tax Exempt Status means that the organization is exempt from paying state sales tax. The organization must hold documentation provided by the state

Unattached Processing
Cataloging products (MARC Records, bar codes, spine labels, etc.) that are shipped directly to the organization separately from their books.

W-9
The home office provided tax document used when a school or library requests it or needs the name, address, and taxpayer identification number.
SCHOOL & LIBRARY: ADDITIONAL Q&A

Q: Can consultants (non-ESR’s) do a holiday vendor event at an unlisted school?
A: Yes, as long as the consultant does not offer any other incentive beyond the requirements of the vendor agreement. For instance, do not offer an additional percentage of sales or free books, do not offer to give a CFAC benefit from boxes sold at the booth, etc.

Q: Can a teacher in a listed school host a party with a consultant other than the listed ESR (not on school grounds) and use their rewards of books for their classroom?
A: Yes, a party can occur; however the party cannot be advertised as a Teacher Appreciation event or a party to ‘fill the classroom of the host,’ etc.

Q: Is there an online ordering option for CFAC?
A: No, not at this time.

Q: Can non-ESR’s work with preschools and/or daycares with kindergarten classes?
A: Yes.

Q: Can the listings of inactive consultants be removed?
A: Yes. Listings associated with consultants who have been inactive for more than six months have been removed from those consultants.

Q: If the annual audit is automated, and part of the requirements are met consistently putting in account notes, who is going to review those?
A: Consistently adding notes to your listed accounts is a requirement for the Annual Listings Audit. The system will be able to pick up notes added to your listed accounts.

Q: Does the new policy, on listing Systems and Branches, mean I can list a library system, but people can service various branches in my system if I don’t list each one?
A: Yes, as long as the ESR has listed the individual branch, they can service them with things like story times, etc.

Q: Is there a sales minimum requirement that must be met before someone can start the process of becoming an ESR?
A: While there are no ‘minimum sales requirements’ that must be met to begin the certification process, you must be considered an active consultant or be in your incentive period.

Q: Is there a way for ESR’s to transfer listings to others?
A: Yes, there is a transfer functionality in the account maintenance section of the back office.

Q: If someone does service your listed school/library, do you get the sales credit/commission?
A: Yes. Once we determine who placed the order to the listing, it will be turned over to the listing ESR.

Q: How does HO check that orders placed for S&L are NOT for listed schools/libraries/systems?
A: We verify the bill to & ship to addresses provided on the PO’s.
Q: Can there be more than one background check per Consultant ID?
A: No. The background check is related directly to the Social Security # on file with your ConsId. Additionally, there is no guarantee that the background check run by Home Office for ESR Certification will cover the specific needs of your school system.

Q: Is there a link from the regular e-commerce site to the ubamlibrary.com site?
A: Yes.

Q: Where can tax-exempt orders be shipped?
A: Tax-exempt orders must be shipped to an address within the same state to which the tax-exempt certificate was issued.