

New Hire Orientation

*Everything You Need to Know About the Marketing
& Administrative Position*

STM LEARNING, INC.

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Introduction

This guide aims to ease the transition between employees, and can be used as a future reference. It is complete, and in depth, with knowledge about almost everything this position requires.

In the table of contents above, each title is linked to its corresponding spot in the document. From there, it is easy to find anything. Control + F is also your best friend.

Part 1: Secretarial

Secretarial Programs

These are all of the programs or websites you will be using for social media, marketing, or in general. Each program has detailed descriptions of how best to use each one.

There is also a brief explanation of the necessary programs for order processing. However, a list of more in depth instructions can be located in a separate area for order processing.

Hootsuite

A website connected to our Twitter and Instagram and is able to schedule posts days in advance. Fairly straight forward, but you can't schedule threads or replies. Also, you must be careful that the formatting of a Twitter post matches that of an Instagram post. Don't forget, Instagram does not allow links.

For Facebook, there is also an option to schedule posts in advance:

Facebook > STM Learning > Meta Business Suite > Post (or Planner)

The Meta Business Suite is also connected to Instagram, so make sure you are not double posting. Also, it is often difficult to use the same image for both Facebook/Twitter and Instagram, so perhaps use two different images or crop it.

[Here is the link to the "best times to post" document.](#)

STM Learning's Website

Woocommerce

The STM Learning website is home to Woocommerce, which is the platform we use to sell our books online. Our website is also where all products are listed. More about how to use and navigate Woocommerce can be located in the order processing instructions.

The website's dashboard on the left has a long list of functions, but the ones you will use the most often are:

- The post section
- The new product section
- Woocommerce
- Analytics and marketing

The post section is where you're able to publish blog posts. This includes the actual post as well as tags, metadata, SEO, and readability information. More on creating blog posts in *Social Media Guidelines*.

The new product section will be where you go to enter the metadata whenever a new product is released. Analytics is self explanatory. Marketing is where you would enter a new coupon if we ever used one.

Coupons

Coupons are relatively easy. Go to our website > Woocommerce > Marketing > Coupons. There will be a list of past used coupons that are able to be edited. To add a new one, follow these steps:

1. Click "add coupon."
2. Title the coupon the code you want to be used – ie the code entered when checking out.
3. Add a description, if necessary, and choose a discount type.
 - a. The "percentage discount" is most likely the one you will use. However, "fixed product discount" may be used for a free trial of the eLibrary, or a discount on a specific book.
4. Choose the coupon discount # and enter the date you want the coupon to expire.
5. You can add restrictions and limits to the coupon.
 - a. Such as the customer must buy \$100 worth to get 10% off, or to make sure the coupon can't be used with other coupons.
 - b. You can also include or exclude certain products.
 - c. Limits to usage is available as well – ie how many times it can be used, per person or per coupon.

Constant Contact

We use the website Constant Contact for sending email blasts to all of our customers. It's pretty easy to learn, there is not a lot of information. However, creating the email blast graphic is a pain. It is difficult to be creative and the system itself is pretty frigid.

Other things to consider:

- You will always have to have Glenn sign off on it before you send it. More than likely, he will have some changes for you to implement.
- STM Learning uses the smallest plan meaning we can only have up to 2500 contacts. Currently, we have about 2380 contacts. Do not go higher than that, otherwise we will be billed more.
 - Also, after each email blast is sent, remove the contacts that are recommended to be deleted by the system. Go to the most recent blast > bounced > all types > recommend for removal.

- When someone buys online from us – Woocommerce – their email automatically goes into Constant Contact. However, you must edit the contact and set the permissions in order to be able to legally send them emails.

Teams

As the secretary and marketing administrator, you probably will not use Teams much. It is mainly used for the editors to transfer files back and forth from each other, especially for the freelancers. Despite that, you will likely be asked to proofread chapters or send files to freelancers.

To access, upload, or download files: log into teams > teams > files.

Teams is accessible on both the desktop app, and through the Google Chrome account. Keep in mind that Teams is sometimes very slow or does not want to work.

There are also file folders for each of the current books. You can see how far along the books are by logging into Trello. However, I do not think it is continually updated anymore, as Samantha is the new managing editor. If you want to restart the organization of the files on Trello, go for it!

Thunderbird & Webmail

Thunderbird is the email program we use in the office, while webmail is what we use when we work from home. Both programs are pretty self explanatory and easily learned by exploring and clicking buttons. However, there are some quirks:

If Thunderbird gives you a weird error – “Confirm Security Exception” – just click yes. It’s fine. Then, reload your inbox and/or send the email again.

Webmail is not always reliable, and you only get the emails sent directly to you. For example, I cannot check someone else’s email (Sam’s old email, orders, support, etc) on my home computer. Most order and support emails are forwarded, but sometimes they fall through the cracks.

Order Processing Programs

There are several programs you will use to input sales and finish orders. Here are some quick introductions to these programs, as well as a link to a more detailed explanation.

[Authorize.net](#) – This is the program used to bill or to receive payment from someone. Most of the time, for online orders, you will get a receipt email from Authorize.net. The rest of the time the payments can be found in Paypal, or you have to process the payment manually.

[Order database](#) – The order database is stored on a separate computer harddrive, and is a record of all sales STM Learning has ever had. It is a finicky program, but learning the quirks is not hard. The order database is internal records only – **don't** send a copy to the customer.

[Quickbooks](#) – Besides the order database, Quickbooks is how STM Learning does its bookkeeping with payments. This is also where you create receipts or invoices. Unlike the database, you **must** send a physical copy of the receipt to the customer.

[Tizra & eLibrary](#) – The eLibrary is where all of STM Learning's online resources can be found. Tizra is the platform we use to host all of the books/flashcards/etc. Tizra is a confusing platform, but plenty of reference guides have been made.

All order processing details can be located [here](#).

Rules, Guidelines, and Tips for Social Media and Blog Posts

House Style Guide

Being a social media manager for STM Learning differs slightly from other companies. As a medical publishing company, we follow the **American Medical Association (AMA)** style guide writing style plus a few situational deviations as our audience is mainly medical, law enforcement, and legal professionals who teach, research, and practice in their fields.

All social media posts, blog posts, advertising, etc. must follow the rules of our style guide. As the social media manager, it is not necessary to memorize all of AMA. Both an overview and an in-depth version of our in-house style guide can be found on Google Drive in the “Style Guide” folder. (We recommend regular review of the “overview” document to stay fresh!)

Below are the rules of our style guide that are most applicable in the Admin/Marketing role:

- When dealing with abbreviations, write out the entire term with the abbreviation following in parentheses. Example: American Medical Association (AMA); emergency department (ED); intimate partner violence (IPV).
- Numerals should almost always be used for numbers, and numerals greater than 10 000 should use a small space to replace commas.
- Lists follow a very specific format.
 - Always use an em-dash as the bullet point whenever possible. **As a note: Google Docs does not have the em dash as a choice for lists.*
 - Begin each list with a capital letter.
 - Periods are not included at the end, unless the entire bullet point is a full sentence on its own – like this one.
- Specific spelling rules:
 - Health care not healthcare
 - Website not web-site or web site
 - Email not e-mail
 - Avoid hyphenation whenever possible.
- Always use “people-first language.” This is one of the most important rules to follow, especially in this position. **The goal is to use a term or phrase that humanizes without sacrificing clarity of message.**
 - Avoid using “addict” or “alcoholic” and instead use “person with opiate addiction” or “person with alcohol use disorder.”
 - Labeling people by their socioeconomic status should be avoided (eg, “the poor,” “the unemployed,” etc.) and instead, use, for example, “individuals with low or no income.”
 - Instead of “disabled person” use a “person with disabilities.”
 - Do not call someone a “victim,” call them a “survivor” or like term.

Guidelines

Blog Posts

We publish blog posts about once a month. These run about 500-800 words and use information from either our own textbooks or other resources. You do not need to cite the entire resource. It is sufficient to link it to wherever you got it from. An important note is that blog posts use concise language and only require information to be stated once. It is not necessary to rephrase or reiterate earlier facts.

Since STM Learning publishes primarily for a medical and legal audience, the goal is to highlight an industry leader or trending topic while (semi-subtly) underscoring the value of our products in the field.

Blog posts also use search engine optimization (SEO). The post itself will guide you in using SEO but using certain key phrases is important. Other SEO reminders include:

- Start with H2 for headers
- Shorten permalinks
- Use specific tags and choose categories
- Choose the right focus keyphrase
- Hyperlink full phrases to cite

Other Guidelines & Tips

All social media and blog posts must be relevant, not only to our company but to the current environment. It is helpful and easy to look in the upcoming month for awareness days, holidays or celebration weeks.

Any images you use must be free from copyright, or be public domain. Images on governmental websites, such as the CDC and any site ending in .gov are public domain. You can also try to use public domain image websites, but it carries more risk that the images are not free.

We use Canva for making quick and vibrant social media graphics (called “assets”) and often you can recycle an asset to fit multiple media platforms.

For the frequency of social media posts, it depends on the time of year and how busy you are with other tasks. However, here is a generic list for each platform:

- Twitter (the most frequent; per week, try to post 3-5 of the company’s tweets and retweet 5 more)
- Facebook (almost as frequent as Twitter; per week, try to post 3-5 of your own posts, and reshare maybe 1 or 2 others)
- Instagram (medium frequency; should post as much as possible but is used for more important, specific, or in depth posts; posting twice a week is ideal)
- LinkedIn (less frequent; usually only post content applicable to us or our direct affiliates; try to post once a week)
- Blog posts (the least frequent; publish only one blog post a month but then promote it on ALL social media channels)
- Email blasts
 - Frequency depends on what you are trying to do. If you want to start a newsletter, once or twice a month makes the most sense. If you’re only using

the email blast as advertising, you should do no more than 1 every 3 months. If a new book comes out, you can advertise release dates and preorder links.

Your email is a great place to get ideas for social media posts: Marianne often forwards ‘food for thought’ emails, while Sam’s email often gets offers and information from other companies. This information can also be used for a marketing idea, or to sign up for a conference.

We love featuring “success stories” from customers who have used our publications in their field and found them useful! Don’t be afraid to seek out happy customers and get their stories—you’d be amazed by the far-reaching impact of our books. Appeal to the mushy side or the justice side whenever possible!

Try to have the caption of the post be the same or similar for all platforms, though you might have to change wording in order to get under the 280 character count for Twitter. If you need to, you can make a Twitter thread to share all your information. However, threads cannot be scheduled on Hootsuite – you must post them manually.

Keep up with analytics and number of clicks or interactions. While there is a helpful list of “best times to post,” it’s really better to see if those times align with the times your posts get the most interactions. Times of year can change the pattern a person checks social media. Also, don’t get discouraged at the lack of interactions! The best way to get more post interactions is to take a few minutes to interact with other accounts—it boosts our profile’s visibility in the algorithms.

When in doubt, talk to the Managing Editor!

Other Secretarial Information

Miscellaneous Information

- In general, the Google Chrome account keeps logins and passwords so you don't forget. Most of them are sam@stmlearning.com while I changed a few to mine. Feel free to change any of those logins (do **NOT** change any with Marianne or Glenn in the username) to your own email. If you do change something, both user and password, you will need to update the password documents.
- For this computer, Excel files can only be opened by going to the Excel application and opening the file from there. Opening it from the desktop does not work. The same goes for Word, except unless you just need to view/print the Word file, you can open it. To edit, you must open it through the Word application.
- This computer can only print to *HP Laserjet M426fdn*, not any of the other printers listed. For the access database, it prints to the printer next to the monitor.
- Some programs can be found on Firefox, not Chrome:
 - Amazon
 - FedEx
 - UPS (rarely used)
 - Authorize.net
 - Vitalsource
- If you do any proofreading or editing, mark the hours spent working on the proofreading in a different color. For example, “proofread FN chapters (1.5 hours)”.

Helpful Documents

- [Introduction to House Style Guide](#)
- [Overview of House Style Guide](#)
- [Secretarial Passwords](#)
- [Social Network Passwords](#)
- **Distributor Logins/Passwords – only found on the server**
- [List of Acronyms for All Books/Products](#)

File Locations – Use this folder and these documents to locate any important or unchanging file you need. Some are available on google drive, some are available only on the server. As a disclaimer, all locations are subject to change.

- [General File Locations](#)
- [File Locations For Editorial](#)
- [File Locations For Secretarial](#)
- [File Locations Masterlist](#)

Other Links

These are some other websites that can be helpful to you, especially for creativity and marketing.

- [Canva](#)
- [Coolors](#)
- [Linktree](#)
- [Twitter Analytics](#)
- [Google Analytics](#)
- [Photopea](#) (basically photoshop, but you do not need to use the Mac for it)

Part 2: Orders Processing

Instructions on Completing an Order

This packet is a detailed set of instructions for all aspects of order processing:

- Order processing
 - Order entry
 - Packaging
 - Shipping
- Distributors
 - Amazon
 - Baker & Talor
 - Rittenhouse & more
- Affiliates
 - Academy of Forensic Nursing (AFN)
 - The American Professional Society on the Abuse of Children (APSAC)
- Additional notes
 - Voiding an order
 - No charge books
 - Returns
 - Conference & international orders

*The order processing sequence is pretty much the same throughout, with two exceptions:

1. The way we receive an order (a web order, a physical order form, a PO, and/or eLibrary orders). [More info on the eLibrary and sending eBooks here.](#)
2. If the order comes from a distributor or an affiliate. Each distributor and affiliate have a specific way of processing and shipping an order. See below for more details.

*Process orders as early as possible! The mail person usually comes mid-morning. However, UPS or FedEx orders can be lower priority because Marianne can take those at any time during the day.

Order Details

1. Woocommerce (web orders)

- a. Go to our website (www.stmlearning.com) and log in as admin.
- b. Hover over the STM Learning icon at the top and choose "Dashboard."
- c. Go to "WooCommerce" > "Orders" and select the new order.
 - i. *Please note:* We don't charge customers for shipping on our website. Only charge shipping for international or bulk orders that are placed by email/phone.
- d. Print the "Order Details" web page.
 - i. You should receive an email whenever a new order is placed that will link you directly to this page: *[STM Learning] New Order #XXXX*
- e. Continue order processing sequence as usual.

- f. Do not forget to check the page for coupons or discounts, especially if it is the AFN affiliate coupon. See more below.

2. eLibrary Orders

- a. For e-book or eLibrary orders purchased on Tizra (elibrary.stmlearning.com), order details will be emailed through support@stmlearning.com. Print this email.
- b. Paypal is the main method for eLibrary orders. Print the Paypal "Transaction Details" page as well.
 - i. My Paypal > Recent Activity > Payment from X
- c. Besides order processing, you may have to send redemption codes for subscriptions or book access. [Learn more about Tizra and eLibrary orders here.](#)

3. Other Orders

- a. For conference purchases, refer to the order form filled out by the customer in person.
- b. If an order was placed by phone or email, fill out an order form for the customer and record as much information as possible.

Order Entry

1. Access Database

- a. Search for the customer in the Access database first by entering their company name, if given, in the "Institution" box – such as, "Amazon Advantage." If the entry doesn't come up or there's no company listed, try searching by zip code and/or last name.
 - i. To search, click in the "zip code" or "last name" field and then click the binoculars. Enter the zip code you are looking for, and make sure the drop down has "any part of field" chosen. Click "find next" until you locate the customer or the list comes to an end.
 - 1. If you can't find the customer, click "Add New Customer" and fill out as many fields as possible. The *customer specialty* is a required field, but there is an "Unknown" option if you're unable to determine a category to place the customer in.
 - 2. To update the general information of a customer, you must click into a random existing order, then save and exit. The customer information will have changed.
- c. Enter a new order by clicking "**View/Add Order**" in the blank row at the bottom.
 - i. If they have a lot of orders, you have to scroll down to access the blank row. **DO NOT use the wheel on the mouse**; you must manually click the scroll bars and scroll down.
 - ii. Include the payment method, order source, and ship method from the options available. Make sure to also include ship date and payment received date.
 - 1. *Updating the order* – these are situations where the order record must be updated.
 - a. If the order has been shipped before payment is received, click the "Shipped/Not paid" box. Explain why in the

- notes (unless it's self-explanatory, like with a PO) and update whenever the payment *is* received.
 - b. If the order is on hold, click the "Order on hold" box and explain why. Once shipped, update the ship date.
 - c. If the order is a quote and then the customer buys, DO NOT make a new record in the database. Go to the original order (quote) and update it to a PO, card, Paypal, or whatever payment method they used.
- iii. If paid with a credit card, try to include the expiration date and the last 4 digits of the card (ie xxxx-1234)
- d. **Enter the acronyms** for each book, with the correct quantity.
 - i. Include discounts if applicable.
 - ii. Make sure to include the "e-" in front of any e-book titles so the correct information is generated.
 - iii. Double check the ISBNs to make sure your entry matches what the customer ordered.
- e. Click the boxes on the lower left side to **find the totals**.
 - i. Calculate total items first, and then click the order total button.
 - 1. Click "calculate total items" more than twice.
 - ii. If shipping charges need to be made, add them to freight charges at the bottom, **not** in the shipping column for individual books. Enter the freight cost after you calculate the total items, but before you click for the order total.
 - iii. *If the total does not match what the customer has paid or intends to pay, figure out why before moving on.*
- f. **Print** off the order form. **Make sure to click "Selected Records"** when printing so it only prints the order you're currently entering.
 - i. If you forget to click "Selected Records" the entire database will print. Don't worry, just remove all of the printing paper from the tray. It will give up the order.
 - ii. *Note:* This is the first sheet of your order form packet. It should be followed by the invoice/sales receipt, the transaction receipt, the original order form (if applicable), and the shipping receipt or labels. Any email correspondence in regards to the order should also be included with the packet.
- g. Make sure to **save the order** by clicking the last box on the left side under the "total" boxes.

2. Bookkeeping

- a. Open **QuickBooks** from your desktop.
- b. If the customer has already paid, enter the order as a sales receipt. If they have not, enter the order as an invoice or quote depending on what has been requested.
- c. **Find the customer**, or enter the new customer's information.
 - i. In the customer search bar, select the name of the individual or company that matches the order from the Access database.
 - ii. If their name doesn't come up, hit "Quick add" from the popup. Fill out the rest of the customer's information in the address box, and

QuickBooks will create the new entry once you close and save the receipt/invoice.

- iii. If the customer's given shipping address doesn't match what they used before, click the drop-down arrow for more options.
 1. If you don't find the one you need, select <add new> and enter the new address.
 2. Distinguish between the billing and shipping addresses if different.
- iv. Fill out the **additional boxes**, such as the ship date, rep, and tax (unless otherwise indicated, select "No tax"), and choose a relevant message for the order.
 1. For invoices, include the terms and PO number if applicable.
 2. For sales receipts, include the payment information. For the credit/debit option, note which card type was used. *Don't enter the card number.*
- d. **Enter the books** using their acronyms. Input the acronyms again in the class box.
 - i. When you enter a bundle, QuickBooks will separate each item onto its own line. Use the bundle code as the class for each individual item (eg, SA vols. 1 & 2 should both be classified as "SA 2-vol" even though they will appear separately).
 - ii. Add discounts on the next line. Change the description to "Discount x%" instead of the default "Discount *title*." Include the book/bundle's class here as well.
- e. **Double check** that the total aligns with the database entry and original order form.
- f. **Save** the order and **print** it off.
 - i. Print two (or more) copies, one for the packet and one to place in each box. There are some exceptions to this when it comes to distributors.
 - ii. For some distributors, and for orders not placed online, you will also need to email the receipt. You can save the document as a PDF under the "print" button.

3. Payment & Pay Method

- a. Authorize.net
 - i. If you need to process the customer's payment manually, log in to **Authorize.net** to charge their card.
 1. Can be found in the order folder bookmark on *Firefox*.
 - ii. Click on "Virtual Terminal" on the left. Select "**Charge** a credit card" and "Authorize and Capture."
 1. Input the customer's card number and its expiration date (no spaces).
 2. Enter the amount and invoice number (from the order entry), and put "STM Books" as the description.
 3. Fill out the customer's name and zip code. While the zip isn't required, entering it lowers the cost of the charge for STM, so fill it out whenever possible.
 4. Enter the customer's email so they get a receipt when their card is charged.

- iii. **Print** one copy of the receipt for the order packet.
- iv. *Please note:* Once you have filled out the required fields, the form will submit automatically if you hit the “Enter” button on your keyboard. Be sure to avoid doing so until you have finished the above steps.
- b. Access Database
 - i. In the database, include the card type, the last four digits of the card and expiration date if possible.
 - 1. *To enter the card type – if it begins with 4 it is a Visa; 5 is a Mastercard; and 6 is a Discover card.*
 - 2. For a card number, enter it like this: xxxx-1234.
 - ii. The access database has several payment methods and order sources.
 - 1. The cards and Paypal are self explanatory. Credit is used for a return, and POs (purchase orders) are physical orders from companies that are emailed or faxed. For Amazon, always choose Consignment.
 - 2. Choose the “Distributor” option for any distributors – Amazon, Baker & Taylor, Rittenhouse, etc. Web orders are any that come from Woocommerce, and repeat orders are usually the same exact books over and over – or the renewal of an eLibrary subscription.

Completing the Order

4. Package the books

- a. If using an envelope, place book-sized cardboard pieces on the top and bottom of the package to prevent bending. With boxes, reinforce the corners if shipping paperback books. Do a “shake test” on the box before taping it up to make sure nothing will slide around.
 - i. [More detailed packaging instructions here](#), or see below.
- b. Include the receipt/invoice with the books, along with available flyers.
 - i. Remember: 1 receipt in every box – 3 boxes, 3 receipts
 - ii. Distributors never get flyers
- c. **Weigh** the package.
 - i. For FedEx and UPS shipments, you have to round up to the nearest pound. Those two also require you to enter the dimensions of the box.
- d. Create the **shipping label**.
 - i. Typically, Media Mail (Stamps) will be the go-to service, but the customer may request something else.
 - ii. FedEx tends to be cheaper for heavy orders or ones with multiple packages.
- e. Attach the label to the package.
 - i. Make sure to enter the customer’s email address so they receive their tracking number and updates.
 - ii. UPS and FedEx labels have designated pouches for their shipping labels, and so does USPS Priority Mail.

- iii. Some distributors will have additional labels and/or require labels to appear a certain way, such as Amazon. See distributors for more details.
- f. *Reminder:* Don't charge shipping for the orders that come through our website, but do charge shipping for international or bulk orders that are placed by email.

5. File the order.

- a. **Finish the order packet**, including:
 - i. Order database sheet (always first)
 - ii. Invoice/sales receipt (quickbooks)
 - iii. Any original forms such as a PO, important emails, or a written order form
 - iv. Shipping confirmation and labels
 - 1. Not necessary for e-book
- b. Then, **file it away** in Glenn and Marianne's office. Be sure to file it correctly in the drawer.
- c. For web orders:
 - i. Mark the order as "Complete" in WooCommerce once you have finished processing it.
 - ii. If the customer has pre-ordered a book, or the book is on backorder, mark it as "On hold" in WooCommerce and keep the order packet in the "Pre-Orders" folder on your desk.
- d. Keep any other pre-orders or open invoices in their designated folders as well:
 - i. Pre-orders
 - ii. Back orders
 - iii. Follow ups (usually when someone requests a quote, but never buys)
- e. Email the customer their tracking number.
 - i. It is also helpful to send a digital copy of their receipt as well.
 - 1. Save the receipt as a PDF before you exit Quickbooks.
 - ii. It is not necessary to email the tracking number if the customer's email was already in Stamps/Media Mail – they are sent details automatically.

Distributors

Each distributor has specific instructions for purchase orders, shipping, and discounts. Amazon orders the most frequently, while Baker & Taylor and Rittenhouse order occasionally.

Always include PO # on forms. **Don't apply credits to any distributor orders**, and *never* send them flyers.

Common

Amazon

1. Go to Amazon Advantage. Click Orders Purchase Orders Confirm New PO. Click on the PO number; don't check the square. Hit Update All Items.
2. Print the Packing Slip and Shipping Label (plus an extra copy of each to file). If there are multiple packages, you will need to a copy of each
3. **Switch over** to the Access database to enter the order.
 - a. Pay method: Consignment.
 - i. Amazon gets a 40% discount, but it should already be applied in the access database.
 - b. Always include the PO #.
 - c. Do *not* mark shipped/not paid or enter a payment date.
 - d. Print the "selected record."
4. Prepare the **shipment**.
 - a. Package the books and put the Amazon packing slip inside the package (in place of the invoice/sales receipt).
 - b. Amazon's shipping label must go in the top left corner.
 - c. Attach the regular shipping label (from Stamps or FedEx) wherever else it will fit on top.
 - d. Keep the tracking numbers for each box handy.
5. **Go back** to Amazon.
 - a. Go to Orders Shipments Create a Prepaid ASN.
6. Select the PO and then Continue to step 2.
 - a. Make sure "Small Parcel" and "AMZNCC" are selected.
7. Continue to step 3.
 - a. If you have multiple packages, Amazon will direct you to identify which books are in what carton, and then it will assign each carton its own container code.
 - b. Most of the time, you will need to select "Mixed Carton" since there will be more than one type of book in a box.
 - c. Enter the tracking number(s) for each carton.
8. Continue to step 4.
 - a. Fill in the expected ship and arrival dates.
 - b. Select a carrier (USPS or FedEx).
 - c. Put our invoice number where it says to enter your shipment reference ID.
9. Confirm and submit shipment.
 - a. **Download** and then **print** the carton label.

- i. Downloading the file first will center the label on the page, and you must open the pdf from the desktop to print.
 - ii. *This* label must be placed sideways on a blank side of the box – meaning, you cannot use a box with no fully blank sides on it.
10. Go to **QuickBooks** to create your invoice.
 - a. This can wait until last since a copy doesn't have to go in the box for Amazon orders.
 - b. Amazon always receives a **40% discount**. Double check the list price with what's on the website, and make sure it matches our invoice.
 - c. Print one copy to file.

**Please note for Amazon:*

- If they order titles with a CD, you must tape the CD to the book so the two don't get separated.

- You must apply an ISBN sticker with the barcode to all places where the ISBN shows.

- Addresses may be different on each order!

Baker & Taylor

1. Pay method: **Check**, but you must initially submit an invoice for payment. Always give a **35% discount**.
 - a. **Invoices** for Baker & Taylor are submitted through an Excel spreadsheet (Secretarial STM Learning Distributors Baker & Taylor Invoice Submissions).
 - i. Make sure to use the date format of YYMMDD. Don't include dashes in the ISBN, and put all information starting with the ISBN column on the next line down. Refer to the template for comparison.
 - ii. The spreadsheet should be filled out once the order is complete. They prefer if we include all orders from the week in one invoice, so wait to send it to vendexcel@baker-taylor.com until later in the week.
 - iii. Mark as "shipped/not paid" in the Access database.
2. Shipping: Don't charge for shipping. Ship via **UPS Collect** using one of the account numbers on file. Each location has a different account, so make sure you're charging the receiver.
 - a. Refer to the three letters in the PO # and the shipping address to help identify which location to bill. The account information is in the B&T packet and should also be included on the PO.
 - b. Include the PO # in the reference field.
 - c. Place a copy of the invoice in the package.
3. Contact: Call (704-998-3153), fax (704-998-3304), or email our account manager, Lorri Vickery (lorri.vickery@baker-taylor.com).

Others

Rittenhouse

1. Pay method: **Pre-payment**. Charge the credit card on file with the confirmed price on their purchase order. Always give a **40% discount**. If the purchase order has an incorrect discount or price, contact the company to update the PO.
 - a. If they provide a new card, please update it in the Access database for our records. The name on the card may change.
 - b. Enter Mike's email (below) when you charge the card so he receives a receipt.
2. Shipping: Do not charge extra for shipping. Ship via UPS Collect, making sure to bill their account (# 169373). Include the sales receipt in the package.
 - a. Send the tracking information and a copy of the receipt to inventory@rittenhouse.com.
3. Contact: Mike Hannon (mike.hannon@rittenhouse.com) or Cheryl Strong (cheryl.strong@rittenhouse.com).

Matthews Book Company

1. Pay method: **Check**, but you must initially submit an invoice for payment. Always give a **40% discount**.
1. Invoices need to be placed in the package and e-mailed to purchasing@mattmccoy.com.
2. Shipping: Don't charge for shipping. Ship via **UPS Collect** using their account (# 665303)
3. Notes from the database:
 - a. Standing order for new product. Send two copies with PO - "Standing order per Teresa Rosen."
 - b. For books not yet available, contact the purchasing email above with the publication date and place the order form in the future orders file. They typically want the titles regardless of "Date required" on the PO.
4. Contact: Becky Brown (beckyb@matthewsbooks.com).

Complete Books

1. Pay method: **Pre-payment only**. Use Visa on file. Always give a **20% discount**.
 - a. Include the sales receipt in the package and email a copy to purchasing@completebook.com and buyer@completebook.com.
2. Shipping: Ship via FedEx - (221190572)
 - a. There is a different address with each order. Check the "ship to" section on the PO for the correct address to add to the order form in the database.
3. Notes from the database:
 - a. Starting Nov. 2008, may fluctuate between 20% and 25% discount per Glenn's decision.
 - b. If sales go above \$10,000 per month, their discount for the following month goes to 35%. See folder in the distributor file for details.

**Please note:* STM does have a few additional distributors who order less frequently, including Barnes & Noble, Login Canada, and Ingram. Follow the notes on the Access database and check for any printed notices in the "cheat sheets" folder.

Affiliates

Academy of Forensic Nursing (AFN)

Previously, orders were taken by AFN and given to us via a spreadsheet for processing. As of 2020, AFN members will place their own orders directly through the STM Learning website.

If customers come to stmlearning.com via AFN's website, which advertises several of our books, they receive a coupon code **(AFN5) for 5% off** of their total. The coupon code will appear on the bottom of their order in WooCommerce, distinguishing the order as coming from AFN. On these sales, **AFN gets a 20% commission**, which Marianne pays to Diana Faugno every few months.

1. Enter the order(s) in the Access database.
 - a. When you first open the data entry, and after entering the password, continue as "AFN" instead of "Marianne." The order number should begin with a "51" instead of a "01." This way, the database will track which sales contribute to AFN's commission.
 - b. Then, enter the customer like normal.
 - c. Give a 5% discount for each book the customer purchased.
 - i. **Don't** put the 5% as a "default discount" for the customer when filling out their profile. If they order again in the future without going through AFN, we don't want to accidentally give AFN a commission for it.
 - d. Make sure the total aligns with what the customer paid online.
2. Enter the order(s) in QuickBooks.
 - a. Create a sales receipt as normal & make sure under **"AFN" is selected as the rep.**
 - b. Change the discount title for each book to read "AFN Discount 5%."
3. Shipping
 - a. When you package the books, include the receipt and the AFN flyer (which directs customers to order our books through AFN's store) instead of the regular one.
4. Track AFN's commission – *most likely, Marianne takes care of this as long as you give her the completed order packet directly.*
 - a. Under data_sec Affiliates AFN, there is a spreadsheet called "AFN_STM Calculations."
 - b. Enter the date, order number, and total cost. The spreadsheet will calculate what AFN is owed for the current time period.
 - c. Copy these calculations over to the physical spreadsheet that Marianne keeps in a folder beside her desk.
 - d. Marianne will make payments to AFN on the 5th day of the month for the orders processed the previous month.

The American Professional Society on the Abuse of Children (APSAC)

Orders are placed by an APSAC employee (usually Bri Stormer, bstormer@apsac.org). Customers will order STM books directly from APSAC's website, then APSAC will email us their order confirmations.

On these sales, **APSAC gets a 20% commission**. Basically, the customer pays APSAC full price for the books, then we invoice them for 20% less of the total cost. APSAC also charges their customers an extra \$5 per book to cover shipping. This goes to us as well, even though it may amount to more than shipping actually costs us.

Please note that customers can also purchase resources from other organizations through APSAC. Those items will also be included in the order confirmation, so just ignore them.

1. Enter the order in the Access database.
 - a. When you enter the order, change the profile to "APSAC." The order number should begin with a "53" instead of a "01." This way, the database will track which sales contribute to APSAC's commission.
 - b. Then, enter the customer like normal.
 - c. Give a 20% discount for each book the customer purchased.
 - i. Even though the customer isn't actually getting that discount, this will help determine what APSAC is making in commission for the sale.
 - ii. **Don't** put the 20% as a "default discount" for the customer when filling out their profile.
 - d. Determine how much the customer was charged for shipping by APSAC (\$5 per book), and add that amount under "Freight Charge" before calculating the order total.
2. Enter the order in QuickBooks.
 - e. Create an invoice.
 - f. Add the customer if new, and select APSAC as the rep.
 - a. Enter all of the ordered books at their regular price, then enter the 20% discount for each.
 - b. Add the previously determined shipping cost.
 - c. Save and print a copy of the invoice, then **create a shipping slip** with no prices listed to send to the customer.
3. Pack the books with the shipping slip inside the box.
4. Email the invoice to APSAC. They usually will mail a check shortly after.

Additional Notes

Voiding or Canceling an Order

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No Charge Books

There are some instances in which we will ship books for free (eg, honorariums, to conference organizers in lieu of paying a fee, to business partners or contributors, etc.). For these, give a 100% discount when you enter it in the Access database. Then, you will need to create a

shipping slip in QuickBooks. To do this, open a new invoice and change the format using the drop-down on the right side of the toolbar. In the order number box, replace the number with “N/C,” and include an appropriate message at the bottom. Make sure the total is zero, print two copies (one for them and one for our records), and keep the order packet in the “No Charge” file or give directly to Marianne. If you get confused, please ask Marianne as she has done plenty of those before.

Returns

When receiving returns from distributors, go to the order they want to return – do not make a new order. Select “return” as the payment option. In the Access database, enter the book quantity as a negative amount (the cost will have parentheses around the total).

For Amazon returns, just put “Return” as the PO number.

With QuickBooks, enter it as a credit memo. The “01” that begins the order number should be changed to a “CR.” Write the number on the side of the order form in red to distinguish it as a return. Make sure to factor any discounts in the return total.

If the book is not in re-sellable condition, you can send the distributor pictures of the damage and refuse the return. This won't work with Amazon, but the rest of the distributors have their own processes regarding damaged returns. See Marianne for details.

Conference Orders

When Glenn sells books at a conference, the orders need to be entered under his name. In the order database, change the user to Glenn (orders should have the prefix “03” instead of “01”). Additionally, the order source needs to be the conference. Ask Marianne for instructions on creating a code with the conference name; this will help in calculating sales later on.

In QuickBooks, make Glenn the rep for any receipts you create. Otherwise, process the orders the same way. Be sure to email sales receipts to customers after you charge their cards.

International Orders

Occasionally, we receive international orders. Depending on where the order is coming from, it can be deferred to one of our overseas Eurospan PODs. Refer to *stmlearning.com* to see who to contact. Canadian orders are typically filled in house, but you can also refer the customer to Login Canada.

The orders are mostly handled the same way. Use Priority Mail (USPS) unless the customer requests another service. When preparing the shipment, first determine which size flat-rate box to use, and figure out how much it will cost to send that size box to the customer's address. Notify customers of the shipping fee (via a quote, typically) before you print the label;

they may decide to switch to an e-book or order from one of the aforementioned international distributors rather than paying a high amount.

Within Stamps, you will need to fill out a customs form. On the form, note that you are shipping “merchandise.” Select “other” and enter “books” as the item. You will need to weigh the individual books and input their cost. Make a copy of the shipping label for your records. Unlike other orders, it does not come with a receipt, and you want to have proof of shipping. Instead cutting the label out, attach it to the box in a priority mail pouch — similar to what UPS and FedEx use.

Detailed Packing Instructions

Print the order for reference and process as usual. Count out the number of each title ordered. If there are more than 2 books, a box should be used. If the order is 1 or 2 books, a bag (?) can be used

Larger Orders

1. Prepare boxes
 - a. Tape along all edges
 - b. Line the bottom of each box with paper/bubble wrap to cushion books
 - c. Reinforce corners with cardboard pieces
2. Package books
 - a. Secure books so they are not able to move during transport
 - i. Box should pass the "shake test"
 - ii. Paper should be on all sides, including top & bottom
 - b. Include the receipt/invoice in each package
 - i. Also a flyer for non-distributors
 - c. Tape along all edges
3. Label boxes accordingly
 - a. Media Mail, FedEx, and UPS labels can be placed anywhere on the top of the box
 - i. Media Mail (USPS) gets taped directly onto the box
 - ii. FedEx labels get folded in half, inserted into a FedEx label covering, and the covering is stuck onto the box
 1. Must tape down the edges of the covering as well
 2. Found in the drawer under the counter
 - b. For Amazon:
 - i. Tape the provided shipping label on the top left corner of each box & write STM address on the blank lines (1220 Paddock Drive, Florissant MO 63033)
 - ii. Place the container label on a blank side
 - iii. Place the Media Mail/FedEx shipping label wherever it fits on top (do not overlap labels)

4. DO NOT TAPE OVER BARCODES

Smaller Orders

1. Use the UPS Express bubble wrap lined pack (under the counter on a shelf)
 - a. Cut a piece of cardboard to match the size of the book(s), but slightly bigger to reinforce the package
 - b. Include the invoice/receipt and flyers
 - c. Tape the package as close to the outline of the book as possible
2. Use the UPS Express bag and turn it inside out (2nd drawer from the left)
3. Put the package inside the priority mail bag and tape closed
4. On the side with no tape, tape the media mail label in the middle.

Tizra Information

Introduction

Tizra is the platform that STM uses for its eLibrary and is how customers can access their online products. To access the platform, open the Tizra bookmark on Chrome and choose “Tizra Admin”.

The eLibrary is run separately from STM’s actual website, so to access the eLibrary you must go to <https://elibrary.stmlearning.com/> instead, or follow the link on the website.

Almost everything you could need to know has been compiled into helpful instructions on Google Drive. [Here is a list of links to all the guides and references.](#) The guides can also be found Drive > Tizra & eLibrary > eLibrary Instructions.

Despite the guides, I recommend having a 1 on 1 zoom meeting with Abe Dane, who is in charge of our account on Tizra. It would be smart to have a second person – perhaps Sam or Marianne – sit in on the tutoring session.

Subscriptions

There are 3 types of subscriptions:

- 1 month subscription for 1 person (\$40)
- 12 month subscription for 1 person (\$360)
- Institutional license
 - This license is for libraries, universities, or other big groups.
 - Pricing varies depending on the number of users and duration of subscription. There is an excel sheet available to calculate the price.

Definitions

Perpetual Access

All orders that are only *singular* books are perpetual access, meaning the customer will have bought access to the book forever. The only time books are *not* perpetual access is when STM Learning manually sends out codes for a free trial or a giveaway.

If the customer *buys* a perpetual access book via a web order, they do not need redemption codes, as they have already received a username and password to log in with.

Redemption Codes

Redemption codes are used to redeem a subscription, and in some cases, a single book. These codes have to be manually sent by STM using the correct formatting and tags. [Tizra also allows you to check who has redeemed a code and who has not.](#)

Code Actions

Code actions allow STM and Tizra to decide what authorization the user gets. When a code is created, you must choose an action from a drop down menu. While there are 5 options, only 2 are used regularly: *Add tag to user* and *apply offer to user*.

Create redemption codes

Number of Codes: 1

Batch: 220303 Test

Code enabled? ☒ Yes ☐ No

Uses Left: 1

Code Action: ▼

Comment:

- Add tag to user
- Session license
- Apply offer to user
- Apply offer (match)
- Session license (match)

Create Codes

Add Tags to User

Tags are the best way to separate who buys what product. When creating redemption codes for an eLibrary subscription, you must use the tag “Subscriber.” A single person can subscribe either for 1 month or 1 year at a time.

These tags are shown under the “users” section. If a user does not have a tag, that means they only bought a single book for perpetual access. Other tags include: staff, trial30 (meaning a 30 day trial), or lead author.

Add Offer to User

Offers are how STM is able to send redemption codes for a *single book*. This is mainly for sending books as an honorarium or a giveaway, but not always. [Here is how to create redemption codes for a single book.](#)

When *add offer to user* is chosen, an extra line appears, asking for the Tizra ID of the offer. The ID depends on what book you are sending out. The offer ID can be found on the book page by going to the content section and choosing the correct title. Pay attention though – the book ID is *not* the offer ID.

On the right side, click “buy eBook” under the offers section. It will give you the correct ID for the offer to copy and paste into the Tizra ID offer. Add a comment on who or what the book is for.

If you are sending books for honorarium, make sure the ID matches the rest of the batch of authors and contributors.

Redemption Codes & Access

Tizra does not always automatically send the customer everything they need: STM manually has to send the customer their information and redemption code if they order a subscription through our website. This is so STM can control the account's access and change their tag to "Subscriber."

How to create eLibrary subscription redemption codes:

[For a new account.](#)

[For an existing account.](#)

Most likely, you will only be needing to create codes for new accounts. STM also has to manually change an account's access when someone cancels their subscription. [Here's how to remove or change an account's access.](#)

STM has the ability to [manually send redemption codes for perpetual access to singular books](#). There are three reasons for this:

- Honorarium
 - All authors and contributors get a copy of the book they worked on once the book is published. Some ask for an eBook version.
- If the customer does not go directly through our website to order.
 - This could mean they sent in a PO or called in a phone order.
- If there is an order with more than one copy for 1 perpetual access book.
 - For example, 20 copies for 1 book.
 - [Use 1 code for all 20 copies by changing "uses" to 20.](#)

As for Tizra, it automatically sends the information and username/password if a *single* book is ordered through Tizra. All books, ordered this way, are considered perpetual access and therefore STM does not need to manually change access.

Tizra has automatically sent the customer their information if you receive this email: *Your STM Learning eLibrary Purchase*. The email has been sent to the customer through support@stmlearning.com, which is how you are able to see it.

STM Learning has to manually send the customer the codes if you receive an email like *[STM Learning] Order #4165* and it is not a web order for print books. If you cannot find the payment in Woocommerce, check paypal. These orders are usually bought using a paypal payment.

Other Information

Renewals

For an eLibrary subscription renewal, as long as they were sent the information the first time, you do not need to take any action. You still must enter it into bookkeeping as an order and update the Woocommerce order, but you do not need to send access codes.

Flashcards

There are 4 sets of flashcards that complement 4 of STM Learning's books. These sets can be bought as a standalone, or in a bundle with the text they match with. The flashcards are electronic and easily accessible as a .PDF file, but they are *not* downloadable.

Vitalsource

Vitalsource is the previous platform STM used for the eLibrary, and some people are still subscribed to it and not Tizra. At some point, it would be nice to contact them and switch them to Tizra, but it is not a necessity yet.

These are the people that are still using Vitalsource:

- Rebecca Tilley
- Kirstin Neumann-Sweeney
- Keith Algozzine