An Introduction to
Online Services

Online Services is the online home of your Usborne business. Login to this website in order to place orders, record your future bookings, oversee your own and your team's sales and recruiting activities as well as run various reports on sales and stock history.

You can access Online Services by visiting: https://orders.usbornebooksathome.co.uk/online/Login.php

At login, you will be presented with at-a-glance information on your sales, recruiting, incentive performance and overall business statistics on a new dashboard. You can interrogate this information to drill into your Usborne business; giving you immediate access to key performance data.

This step-by-step User Guide introduces the various features and functions you can access within Online Services. For specific information on interpreting your Dashboard, how to place an order or to manage your downline, please read the relevant user guides or speak to your Mentor:

1. An Introduction to your Partner Dashboard

2. How to place an Order.

3. An Introduction to My Downline (Genealogy)

We'll now take you through each of the main menu entries (excluding "Place an Order" and "My Downline") and briefly explain what you can do on each page:

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1. My Account

My personal details

Here you can amend your personal contact details including name, address and telephone number.

It is important for you to record your home address here and (if possible) not to update it too often or change it to accept deliveries as these are the details we will use to contact you throughout your time as an Usborne Partner.

Amend GDPR preferences

Here you can opt in or opt out of our marketing emails.

Update email address

Here you can see your current email address and update for a new one.

Please note: once you have changed your email address, an email will be sent to the new address you have entered, which should arrive soon afterwards. Follow the instructions in the email to complete the change of email address process. Until the new email address has been confirmed by you, all communications will be directed to your previous email address.

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Update password

Here you can change your current password for a new one.

Please note: passwords must be at least eight characters long and contain at least one uppercase character, one lowercase character, one number and one special character ($ @ ! % * ? &)
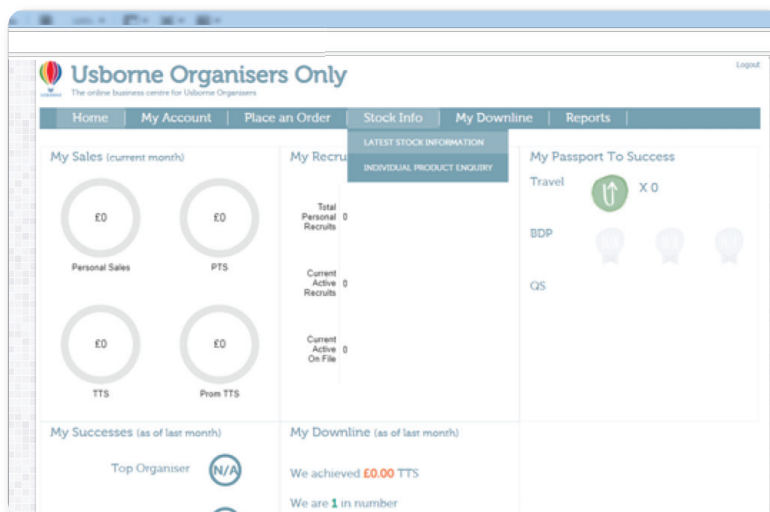
2. Place an Order

In this section, you can place and amend your party and school orders.

Please refer to the "How to place an order" User guide for step–by–step instructions to this process, or speak to your Mentor.

3. Stock Info

The "Stock Info" menu provides specific information on the full range of Usborne books. This complements the Stock Update blog on the Usborne website, which is updated twice weekly (Tuesday and Friday).

Whilst the blog informs you of specific titles that have just come in or gone out of stock since the previous report, you can access live, real-time stock information under this menu. Within Online Services you can find out the following:

Latest stock information

This on-screen report provides live, real-time stock information on every title currently accessible to you via Usborne Community Partnerships. You can view the full list (presented alphabetically by book title) or reorder the report by product code, book series, full retail price and stock availability, whether a title can or can not be placed on hold (see below) among other features.

You can also filter your search so as to only look up certain titles, series or more detailed filters such as if a book is due to reprint or is not yet published. You are also able to export your reports to Excel to print or share.

Watch the video tutorial on how to make the most of the latest stock information report – you can find the clip within tools and downloads.

Disallow Hold function

By default, every title available from Usborne Community Partnerships can be added to an order and placed on hold for a maximum of four days (perhaps whilst you are waiting for a customer to finalise payment to you or agree their free book choices). These are listed in the Disallow Hold field as 'N'.

From time to time, the hold function may be restricted or "disallowed" on a title (e.g. a new title or special offer) so as to ensure that stock cannot be reserved without good reason. These will be listed in the Disallow Hold field (and therefore identifiable) as 'Y'.

Titles with a 'Y' cannot be held at all and the orders they are added to need to be processed completely in one session to guarantee fulfilment. If you place an order with a "Y" title on hold, that title will be automatically removed, although the rest of the order will be unaffected and the normal hold rules will apply.

We will always notify in advance if the disallowed hold function has been applied to a title.

Individual product enquiry
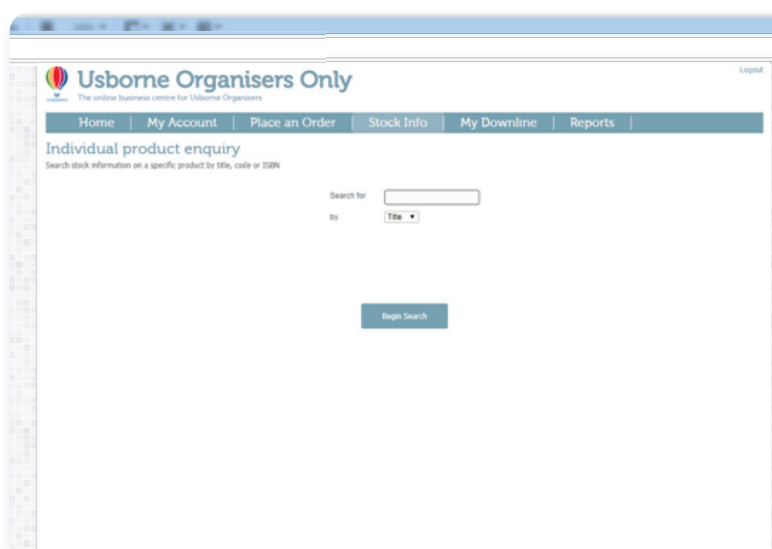
Here you can check the stock availability of specific products by title, code or ISBN. The code, title, ISBN, price and stock figures are given for each title found. This is useful as you add books to an order — you can access this "enquiry" in a new window or tab, without leaving your order, and check the availability of a specific titles in real time.
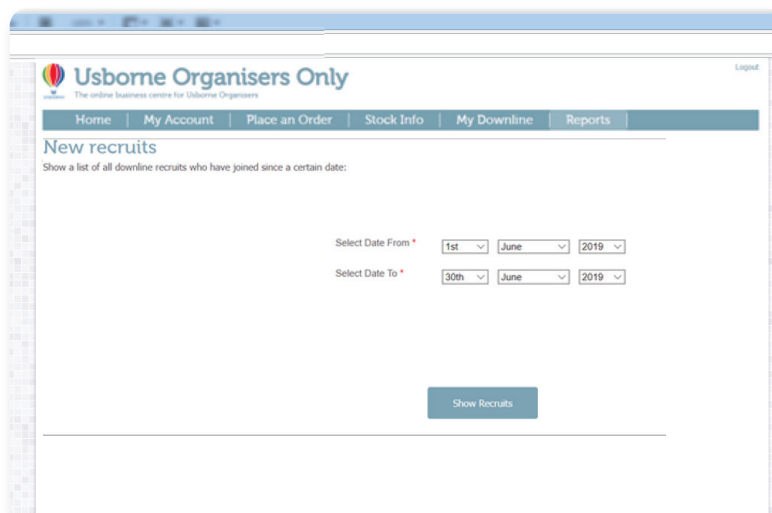
4. My Downline (Genealogy)
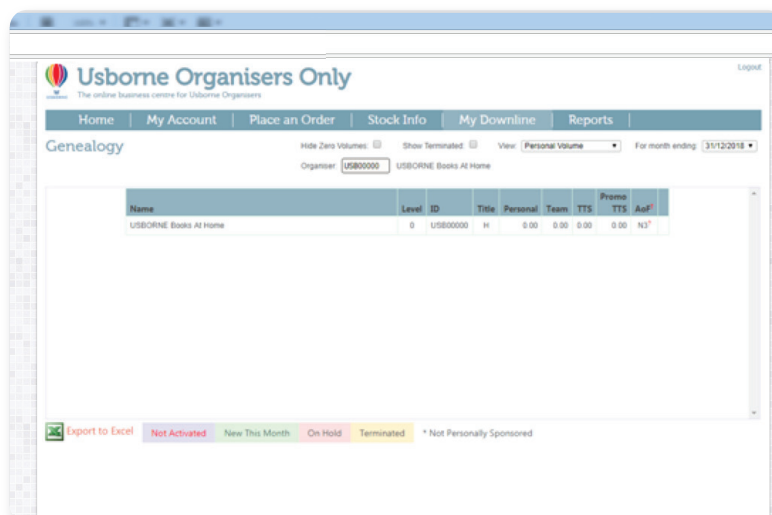
This section allows you to look at the performance of Partners in your Downline.

Please read the "An Introduction to My Downline" user guide for a detailed explanation or speak to your Mentor.

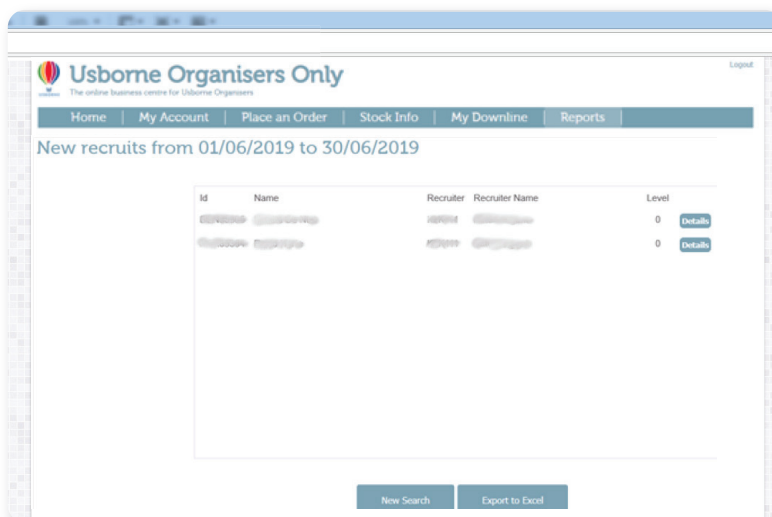## 5. Reports

New recruits

Here you can view a list of all recruits that have joined your downline (including your own recruits) since a certain date. This list is presented by level (i.e. how many levels below you they are in your downline) and gives you the new Partners name and ID as well as the name of their Recruiter (and their ID).
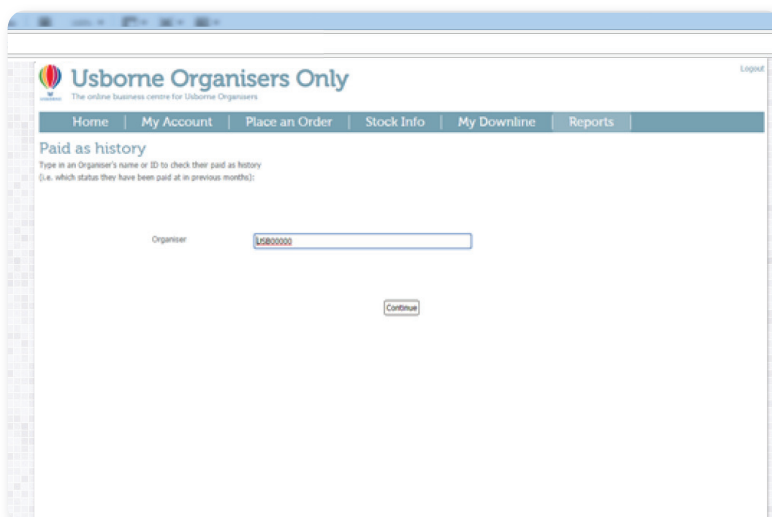
New recruits

Click on "details" next to any recruit to see the contact details for that person as well as useful information such as their Quickstart date and their Team Leader's name. Click on "Export to Excel" to download your report.

'Paid as' history

Here you can type in a Partners name or ID to check their 'Paid as history'. This will tell you which status they have been paid at in previous months, and will enable you to check the progress of members of your downline.

'Paid as' refers to your current Partner status e.g. Team Leader. For details of the specific criteria needed for each status, please refer to the Partner Handbook.

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Top product sales

You can use this facility to run a report to find out the top-selling titles for yourself or any member of your downline. The report can be set between any two dates of your choice. There is also the option to refine order types i.e. party, school, library by unclicking the 'All Orders' box. Top-selling titles can be defined by sales value, quantity sold or volume.

Similarly you can choose to include or exclude non-commissionable items and kit components. Results can then be exported into Excel.

Future bookings list

Here you will see a list of all the future bookings currently recorded by you and members of your downline, listed by Partner. The list also provides you with the event date, host name and postcode for that event. This is very useful to give you a snap shot of future business already lined up within your team. To make the most of this, encourage your team to record their bookings online.

You can also click to 'Export to Excel' to sort by date, Partner, host etc.

Please note: this option differs from the bookings calendar in the 'Order' section, as it provides an at a–glance summary in list format, rather than a by 'date' list in calendar format.
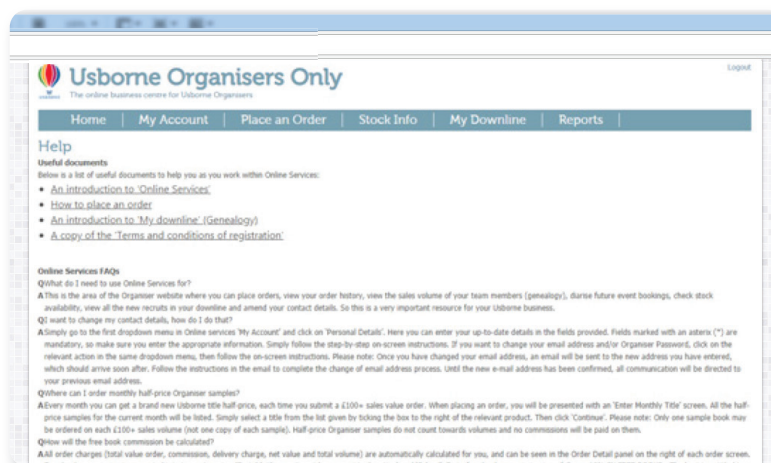
6. Privacy Policy, Contact us, Help

There is a tremendous amount of support material available to all Partners in the Tools and Downloads area of the Usborne Community Partnerships website (simply log in to access the library).

However this section provides specific support in using Online Services only.
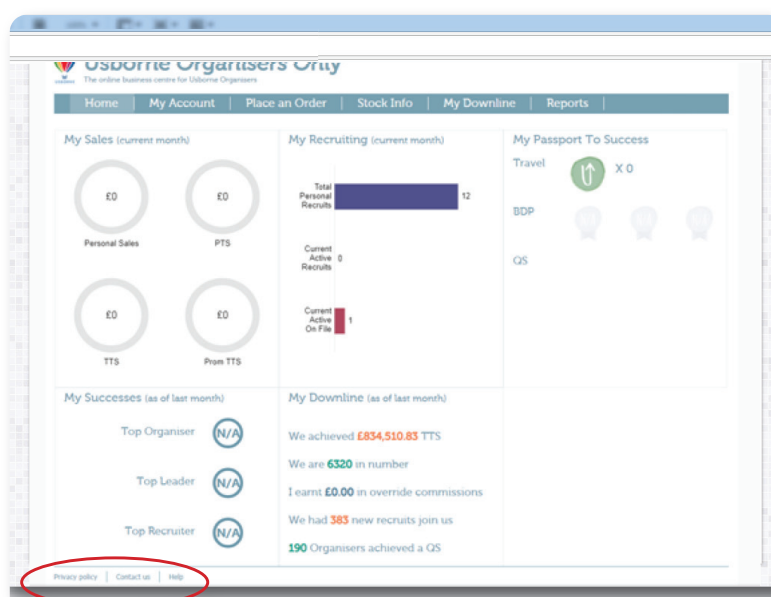
Useful downloads

An Introduction to
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You will find links to five documents here:

An introduction to Online Services

An introduction to your Partner Dashboard

How to place an order

An introduction to My Downline

A copy of the terms and conditions of registration

These documents can also be found in Tools and Downloads on the Usborne website.

We also recommend that you speak to your Mentor as they will be happy to assist with any question you may have regarding using the Online Services website.

(Updated October 2021)