UNIVERSAL
Screen Arts, Inc.

East/West Customer Service Training Manual
Part 1: Order Entry

Modified: January 10, 2022

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Introduction

Order Entry Phone Script

Introduction:
Thank you for calling (Catalog) this is (Your name), how may I help you?

Customer's Account Information:
- ❖ May I please have your **customer #** on the back of your catalog in the yellow box?
    - *If a Bas Bleu order, add "or your Membership # from your member card?"*
- ❖ Will you please verify the **name** as it is shown on the **credit card you'll be using?**
- ❖ Will you please verify the **billing address**?
- ❖ May I please have a **phone number** where we can reach you?
- ❖ For confirmations and tracking information, may I please have your **email address**?
- ❖ May I please have the **catalog code** on the back of the catalog in the blue box?

Placing the Order:
- ❖ **Are we shipping all of the items to your billing address?**
- ❖ I can take the **first item** you'll be ordering today.
    - "I have (Product Description) (Availability) for (Price). How many would you like?"
                    (Repeat until the order is complete.)
- ❖ **Is that it for today?**
- ❖ (**Offer Upsell**) "As a way of saying **Thank You**, you can add 1 or 2 additional items to today's order at a 15% discount so what would you like to add"?
- ❖ May I please have the **type of card** you'll be using today?
- ❖ May I please have your **credit/debit card number**, the expiration date and CID/Security Code?
        (Repeat all of the credit/debit card information back to the customer)
    After you End Order, Offer the Bas Bleu Membership or VIP Insider program as prompted. Provide the correct details for the program to the customer.

Order Completion:
- ❖ Your **order total** is ($__.___).
- ❖ We have this order shipping to (**read the full shipping address**).
- ❖ You should receive your order on or before (**date from shipping calendar**) via (Ship Method).
- ❖ Your **order number** is (P-------)
- ❖ **Is there anything else I can help you with today? Thank you for calling (catalog) and have a great day!**

Section 1: "May I have your customer number?"

Obtaining Customer's Account Information

Select A Customer

Customer Numbers are located on the back of the catalog in the second box.
Enter **AC** then the number into the Search Field.

NO SPACES BETWEEN THE "AC" AND THE NUMBER

There are different types of customer numbers:
AC6525898 – all numbers
ACR833587969 – starting with a letter
AC16HA123456 – combination numbers and letters

If you are unable to access the customer's account using the customer number, use the following:
- Enter customer's Last Name (SPACE) Zip Code.
  - o For example: Doe 44236
- First name (SPACE), zip code
  - o Example: John 44236
- First and last name (SPACE), state abbreviation
  - o Example: John Doe OH

To get a full list of all the ways to search for a customer, type a "?" in the search field.

The most common search types are:

OR	ORDER NUMBER
PH	PHONE NUMBER

Verify a Customer in Thor

After entering the customer's information, several other very similar names and/or addresses may appear in a list on the screen. A pop-up box will appear asking "Which one?" ⬚ Enter corresponding number, and then press enter. Another pop-up box will appear "Change?" ⬚ Enter **Y** and press enter.

❖ **Everyone must have their own account.**
   o I.e. Husband and wife cannot share the same account.
❖ **Never type over someone else's information.**
❖ **Update information as needed.**
❖ **Account highlight:**
   o **Blue** are the most recent account used by the customer.
   o **Green** are the Bas Bleu membership accounts.

Note: Different prompts may appear
If you see Select Survivor: press **F4 Do Not Merge** then **F1 Continue**
If when modifying customer information: select **F4 Update Customer** and **F4 Bypass Standard**, and then select **F4 New Customer** and **F7 Continue to Order.**

Add a New Customer

- ❖ **F1 Cancel Search**
- ❖ **Enter Fields:**
  - First, Middle Initial and Last Name
  - Street (Physical address & P. O. Box)
  - Apt/Ste/Box (ex. Apt 201 or Box 19)
  - Zip Code– City and State will auto-fill
  - Day Phone
  - Same enter **Y** which will fill Night
      If unable to obtain a phone number: Type 0 (zero)
  - Email - If unable to obtain: Leave blank
  - Org Src – Enter Default/Key Code
  - Enter Gender – **F** for Female, **M** for Male and **U** for Unknown
- ❖ **F3 Update Customer**
- ❖ **F4 Bypass Standard**
- ❖ **F7 Continue to Order**

Org Src/Default/Key Codes:

DFSP	Support Plus	**DFWOE**	What On Earth
DFBB	Bas Bleu	**DFDAE**	Daedalus Books
DFSIG	Signals	**DFSIGC**	Signals Canada
DFACN	Acorn	**DFPBS**	Shop PBS

The Starting Four
(Verifying Billing Information)

1) "May I have your **name as it appears on your credit card**, please?"

2) "Please verify your **billing address**." **or** "May I have your billing address, please?"

3) "Please verify your **phone number**." or "Should we need to contact you in regards to your order, may I have the best number to reach you?"

4) "…and your **email address**, please?"

> Billing information <u>must</u> match the credit card.
> Everyone must have their own account.

Catalog/Key Codes

Catalog Codes are also referred to as Key Codes or Source Codes (SC).

Catalog codes are used for marketing purposes and to ensure that the customer is receiving the correct advertised price in their catalog. The catalog code will be printed in the blue box on the back of the customer's catalog and on the order form in the middle of the catalog.

> If the customer does not have a Catalog Code, use steps below to attempt to locate.
>
> ❖ **F3** Last Src Mailed – enter the appropriate catalog code from the list in the Upsell Box
> ❖ Use the Default Catalog Code as a last resort.

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Division List

01-What on Earth
04-Signals
07-Bas Bleu
09-Support Plus
10-Catalog Classics
11-Marketplace
12-Acorn
14-Daedalus Books
15-Shop.PBS

Default Catalog Codes

Acorn	**DFACN**
Bas Bleu	**DFBB**
Daedalus Books	**DFDAE**
Signals	**DFSIG**
Support Plus	**DFSP**
Shop.PBS	**DFPBS**
Signals Canada	**DFSIGC**
What on Earth	**DFWOE**

Section 2: "I can take the first item you'll be ordering today."

Adding Items to an Order

Item Numbers

VM7052
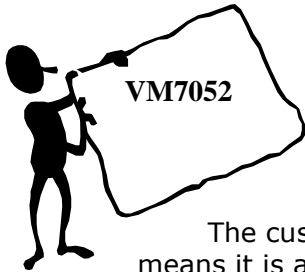
Item numbers contain a combination of letters and numbers. **For example:** XB1522, D77646 and HAA301. Enter items on the Product Number line until the order is complete.

The customer may also give an extra letter at the end of the item number, which means it is a type of clothing. If an item has multiple styles/sizes, the UPSELL box appears. The UPSELL box is red and is located at the top right corner of the order screen. Select line number that matches the desired item. The line number is located to the left of the UPSELL box printed in yellow.

Product Not on File

If when entering item and the Upsell box shows "Product Not on File", there is another way to add the item. On the product line, enter item as shown below:

Ex: AM6481 TL, HW0162 DV, CC4382 PS
Enter the item number, space, the letter for the style (i.e. T for tee shirt S for Sweat shirt) followed by the size. The full item numbers are shown in Thor in Product Review, Keyword Search.

Clothing

Clothing items will usually end with one of the following **"style letters".** Refer to your all-purpose sheet for sizing guidelines.

S	Sweatshirt	K	Child/Youth Tee
L	Long Sleeve Tee	C	Child Sweatshirt
T	Tee Shirt	N	Newborn Onesie
P	Pants	D	Toddler Tee
LL	Ladies Long Sleeve Tee	Z	Sleep Shirt
LT	Ladies Short Sleeve Tee	H	Hoodie

Line Item Search

The customer may not have the item number available. To search for the desired item type a description of the item on the item line. Ex: **Butter.** This will show a list of all items containing the keyword "Butter". Select the line number for the desired item.

Delete an Item

❖ Move back up to the item number needing to be removed.
❖ Press the space bar once then Enter.
   System will ask: "Capture demand for this product?"
❖ Select **F5 No**.

or

You may delete an item by replacing it with another item number.
❖ Move up to the item number that needs to be replaced.
❖ Type over with the new item number.

Section 3: "You can add one or two additional items to the order and get a 15% discount. "

UpSell Items

> ❖ Offering UpSells is required on every order.
> ❖ The UpSell offer should be made **after** the customer states their order is complete before obtaining the credit card number.

❖ UpSell Script: "As a way of saying **Thank You**, you can add 1 or 2 additional items to today's order at a 15% discount, so what would you like to add"?

❖ Type the UpSell Offer Code (space) item number; the UpSell discounted price will appear under the Unit Price.
EX: WOE15 <SPACE> CB5852

Each catalog has its own UpSell Offer Code

UpSell Offer Code	Beginning Letter for Item Numbers
ACN15	X
BB15	U
SIG15	H or R
SP15	F
WOE15	C or A
WIR15	V

*The UpSell should not be offered on **Daedalus Books** or **Shop.PBS** orders.*

Section 4: "May I have your credit card information?"
Adding Form of Payment

Accepted Credit/Debit Cards

Card Name	Abbreviation for Pay Method	Starting Number
VISA	VI	4
Master Card	MC	5
Discover	DI	6
American Express	AX	3

❖ In the pay method field (PM) enter the abbreviation for the type of card, the entire credit/debit card number, expiration date, and CID # security code.

❖ **Verify the customer's credit card** by reading the entire number back to the customer, including the expiration date and security code.

❖ If a customer asks if credit cards are kept on file, explain: *"We are able to see the first and last four digits of your card number and it is used for refund/exchange purposes only".* These cards cannot be used for future orders.

❖ Credit card orders are "pre-authorized" to ensure that funds are available for the customer's purchase. The card is then actually charged when the order ships. The total amount of the order will be **authorized** initially.

❖ Credit/Debit card information should not be written down, given to customers or noted in any order comments.

❖ Once the order is processed and authorized, the credit/debit card information is tokenized. We will no longer have access to the actual card information.
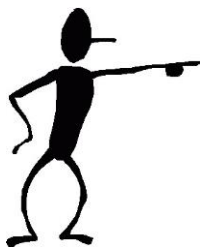
❖ Credit/Debit cards can be used on mail, phone and web orders. Only one credit/debit card can be processed per order.
❖ Checks can be used on mail orders
❖ PayPal can be used on web orders only

Redeeming Gift Certificates

- ❖ Enter the customer's items and offer the appropriate UpSell
- ❖ Select **F3 Pay Method**
- ❖ In the **PM** Field, enter **GB** (Gift Certificate Balance) as the Pay Method for the Gift Certificate.
- ❖ **F4 Redeem Paper GC**
- ❖ Enter the Gift Certificate number, then press Enter. The amount for the Gift Certificate will automatically appear in the next box.
    - o **Old PBS Gift card #:** 8001171D4ZM0675; All of the GCs will begin with 800117 or 880117; these numbers are not needed.
- ❖ In the UpSell box a message will appear saying "Certificate processed successfully."
- ❖ Select **F7 Exit Certificate**
- ❖ Proceed to the end of the order to offer the membership or VIP Insider program.

When you end the order, the Gift Certificate amount will show as "**Credits Redeemed**" in the UpSell box. If there is an amount due in red under the UpSell box, follow the additional steps.

- ❖ Select **F6 How Paid Changes**
- ❖ Type over **GB** with the type of credit card (Ex: VI for Visa, DI for Discover, etc.) and credit card number

Multiple gift certificates can be applied on one order by repeating these steps.
If there is a balance remaining on the Gift Certificate, the remaining balance will be mailed to the customer in the form of a *new* gift certificate.

If when redeeming a Gift Certificate the amount does not appear or the gift certificate is not showing as valid, comment the order with the Gift Certificate number and amount, and place the order in the *Manager Review bucket* (**F4 Postpone Order, F2 Manager Review**).
Gift Certificates may only be redeemed **once.**

Section 5: "We can save you money when you join the Club today."

Bas Bleu Society and VIP Insider Program
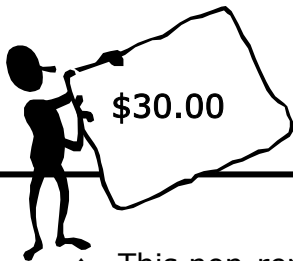
BAS BLEU®

$30.00 | Bas Bleu Membership

1 year Membership Advantages

♦ This non-renewing membership provides **FREE standard shipping** on every order for one year.

♦ **15% discount on most items**.

♦ Gift-wrapping at half-price.

♦ "Members Only" mailings and sale offerings.

♦ A membership card. (Displays customer's name, member/customer number & expiration date)

For US Customers Only

Memberships cannot be purchased as a gift. Please suggest a $30 gift certificate.

Bas Bleu Membership Prompt

By selecting **F7 End Order**, a club prompt will appear at the end of the order for Bas Bleu catalog. In the UPSELL box, select the line number for whichever membership is appropriate:

♦ **1** for first time buyer or **2** for club renewal.
♦ Select **F3 Accept** or **F6 Reject**.
♦ Use BBSOC to manually add Bas Bleu Membership

Shipping Information

If the customer has requested any expedited shipping, they will pay only the expedited shipping fee, which will show in the Shipping Total.

Bas Bleu orders cannot ship outside the U.S.

VIP Insider Loyalty Program

> ❖ Only offer the VIP Insider program when the system prompts you to do so. For prompt, select **F7 End Order.**

Benefits include:

♦ Receive a cash-back rebate for today's standard shipping.

♦ Save 10% on EVERY order placed with our family of brands (Acorn, Bas Bleu, Daedalus Books, PBS, Signals, Support Plus and What on Earth)

♦ 5% cash-back rebate at over 1,000 Marketplace retailers (i.e. Wal-Mart, Target, Walgreens, Giant Eagle, etc.)

♦ Free shipping and return shipping rebates

♦ Payout is in the form of a **rebate check** – we do not apply discounts.

Iowa and *Canada* customers are excluded from the VIP Insider Program. You will not see the VIP Insider prompt.

❖ Customers who join VIP Insider online will enjoy a **7-day** <u>free</u> trial and their program information will be **e-mailed**. Customers who join by phone enjoy a **30-day** trial for $1.99 plus tax if any and a welcome packet will be **mailed**. At the end of both trials, if the customer decides to keep the program, $14.95 plus tax if any will be billed each month to the same method of payment used to place the order.

Section 6: Order recap

Finalizing an Order

The Final Four
Confirming the Customer's Order

At the end of every order confirm with the customer:

1. Total for Order

2. Order Number

   - Customers with an email address on file will automatically receive an email confirmation when their order ships.

3. Where the package is shipping

4. When to expect the package use the shipping calendar

> ### Sales Tax:
> We currently collect sales tax for most states. Thor will automatically calculate the sales tax based upon the product total and, for **some** states, shipping.
> (See all purpose sheet)

While in training, postpone all orders:

♦ **F4 Postpone Order**
♦ **F2 Manager Review**
♦ Reason for wait: **T**
♦ Enter

After training:
♦ Before the customer disconnects, select **F7 Ship Order**

Section 7: **Special Requests**

Catalog Request

- ❖ Access the customer's account
- ❖ **F1 Update Customer**
- ❖ **F4 Bypass Standard**
- ❖ **F5 Send Catalog**
- ❖ In **Inq Src** field enter Org Src/Default/Key Code
- ❖ Press enter twice.
- ❖ The top of your screen will flash "Processing Catalog Request."

OR….

- ♦ Access customers account
- ♦ Which one?
  - o Enter the corresponding number for appropriate account
- ♦ **F4 Send Catalog**

"You will receive your catalog within 2-3 weeks."

Org Src/Default/Key Codes:			
DFSP	Support Plus	**DFWOE**	What On Earth
DFBB	Bas Bleu	**DFSIG**	Signals
DFSIGC	Signals Canada	**DFACN**	Acorn
DFPBS	Shop.PBS	**DFDAE**	Daedalus Books

Use the * to get back into the prior entry to enter more catalogs if needed.

Available Catalogs:
Acorn
Bas Bleu
Daedalus Books
Shop.PBS
Signals
Support Plus
What on Earth

Catalogs no longer available:

Catalog Classics, Art & Artifact and **Floriana** are now part of Signals.

Wireless is online only
*We can still process Catalog Classic orders.

Remove a Customer from the Rental and Mailing Lists
Reduced Email or Catalog Promotion

When a customer states that they would like to be removed from our mailing list, please offer a reduced mailing option. For promotional e-mails, our customers can choose to receive them once a week, twice a month or promotions only. For our catalogs, our customers can choose holiday only, two times per year or four times per year.

- ❖ Select the customer.
  (If an account is not found, create new account and then mark accordingly.)
- ❖ In the **Change Field** enter **"Y"** for Yes.
- ❖ Enter down to the "Reduced Email or Catalog Promotion" field.
- ❖ **Type "?" to see the Reduced Mailing options.**
- ❖ Select **F1 Update Customer**
- ❖ **F4 Bypass Standard**
- ❖ **F1 Continue**
- ❖ **F1 Main Menu**

Remove from Rental and Mailing Lists

- ❖ Ask for the **customer number** or **last name and zip code** to search for the customer.
- ❖ Select the customer account you wish to remove.
  (If an account is not found, create a new account and then mark accordingly.)
- ❖ In the **Change Field**, enter "Y" for Yes.
- ❖ Enter the appropriate number into the **No Rent** and **No Promo** fields as shown in the chart below. **NOTE:** This cannot be done for Marketplace customers.
- ❖ If the customer wants only order status emails, type a "Y" in the **Ord Status Email** field.
- ❖ Update by selecting **F1 Update Customer.**
- ❖ **F4 Bypass Standard**
- ❖ **F1 Continue**
- ❖ **F1 Main Menu**

"It takes up to 90 days to be removed completely as our catalogs are pre-printed, so you may receive one more issue. But you have been removed from (**catalog**)."

	No Rent	No Promo
The customer does not want to receive any more catalogs	1	1
The customer does not want name shared with other companies	1	
The customer does not want email address shared	3	
The customer does not want to receive any emails	3	3
The customer does not want to receive catalogs or emails	4	4

Section 8: "Are we shipping all of the items to your billing address?"

Shipping to Different Addresses

Ship To Addresses

New Ship To Address:
A recipient who is not in our system and must be added

1) Select **F6 Order Special**
2) **F3 Select Ship To**
3) **F6 Add Ship-To** (only if the blue New Customer screen does not automatically open)
4) Enter the recipient's information in the blue New Customer screen and make sure to verify the information by repeating it back to the customer.
5) **F3 Update Customer**
6) **F4 Bypass Standard**
7) Choose line number for desired Ship-To (if more than one available)
8) Press the **Enter** key once to select that Ship-To
9) Select **F1 Select Complete**.

Existing Ship-To Address:
A recipient that the customer has previously shipped to

1) **F6 Order Special**
2) **F3 Select Ship To**
3) Choose line number for desired Ship-To, and then enter.
4) Change? **Enter Y ONLY to change the information**
5) Select **F1 Select Complete**

Multiple Ship-To Addresses:
A customer is shipping to more than one address

1) Follow steps from New Ship To and/or Existing Ship-To.

Take note of the number in front of each Ship-To address in the Upsell box. In the ST column for each line item, enter the number of the corresponding Ship-To and the item will be shipped to that address. 00 refers to the billing address while 01, 02, etc. refer to Ship-To addresses.

Deleting a Ship-To:
1) Select **F6 Order Specials**
2) **F3 Select Ship Tos**
3) Select the line number for the Ship-To that needs to be deleted, then Enter
4) Select **F7 Delete Ship-To** *twice*
5) Select **F1 Select Complete**

The pricing will not appear on the packing slips included with ship-to packages.

Canadian Addresses

- ❖ Canadian Addresses use Postal Codes instead of Zip Codes. These should be entered in the zip code field of the blue template, no spaces. **Ex:** B5M6D2
- ❖ Enter the city according to the customer.
- ❖ Always enter the correct Province Code in the State field.

Alberta	**AB**
British Columbia	**BC**
Manitoba	**MB**
New Brunswick	**NB**
Newfoundland	**NL**
Quebec	**QC**
Saskatchewan	**SK**
Ontario	**ON**
Prince Edward Isl.	**PE**
Nova Scotia	**NS**
Nunavut	**NU**
Yukon	**YT**
NW Territories	**NT**

Bas Bleu & Daedalus orders cannot ship outside the U.S.

Ship Methods for Canadian Destinations

Bas Bleu & Daedalus orders cannot be shipped outside of U.S.

FedEx Canada Delivery
Signals, Shop PBS and Acorn Orders

- ❖ All orders are shipped FedEx Canada Ground
- ❖ The shipping charge is comprised of the standard shipping charge plus an additional fee of $21.95 which covers the duty on the package. (Except international orders)
- ❖ Canadian taxes – GST (Government) and PST (Provincial) are automatically added.
- ❖ A physical address is required. Orders shipping to a P O Box will be shipped Canada Post (Internationally)
- ❖ Orders take 2-3 weeks processing and delivery.

International Canada Post Delivery
What on Earth and Support Plus Orders

- ❖ All orders are shipped Canada Post as well as orders going General Delivery and to Station Main.
- ❖ Customers in the following provinces or territories: **Northwest Territories (NT), Nunavut (NU), or Yukon (YT);** we will be adding an extended area delivery fee of $65.00 in addition the charges on their order.
- ❖ The shipping charge is comprised of the standard shipping charge plus an additional international shipping fee. The order must be held for shipping quote. The S&H costs are significantly higher.
- ❖ Duty is not included in the quote and may be due upon receipt of the order.
- ❖ Orders take 4 to 6 weeks for processing and delivery.
- ❖ Do not quote the customer a total. The customer will be contacted with the total amount within 48 business hours.

Process to hold order:
- ❖ **F7 End Order**
- ❖ **F4 Postpone Order**
- ❖ **F4 Hold for Quote**
     Reason for not shipping: **C**

APO/DPO/FPO Addresses
Military Deliveries

APO	DPO	FPO
Army/**A**ir Force **P**ost **O**ffice	**D**iplomatic **P**ost **O**ffice used by US Citizens abroad with consulates and embassies	**F**leet **P**ost **O**ffice - used by the Navy, Coast Guard and the Marines

❖ Enter the information exactly as the customer gives it.

❖ APO, DPO or FPO will automatically appear in the City Field.

❖ AE or AP will automatically appear in the State Field.

❖ A phone number and email address are required.

APO/DPO/FPO packages are not mailed directly overseas. They are collected by the U.S. Military in the United States and then shipped accordingly to the service person.

Processing and delivery of APO/DPO/FPO orders takes 4 to 6 weeks.

Section 9: **Item Information**

Item Information

<div>

To access Item Information from the Main Menu

- ❖ Select **F8 Product Review**
- ❖ **F6 Keyword Search**
- ❖ **Enter item number**
- ❖ **F7 Select Product**
- ❖ **Which one?** Prompt will appear. Enter two digit line number

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To access Item Information from the order screen

- ❖ Select **F1 Order Option**
- ❖ Select **F8 Product Review**. Select a line number.
- ❖ Select **F1 Return** to return to order.

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Product Review

- ❖ Select **F4 Addtl Prod Inf** key. This key provides additional information about the country of origin, material used, sizing guidelines, use/care instructions and other helpful information that may not be included in the catalog or website descriptions.

- ❖ Select **F6 Keyword Search** to type a description of the item on the item line to perform a line item search

- ❖ Select **F5 Where Advertised** to view where the catalog the item was advertised.

Item Availability

- ❖ **Physical Inventory:** Items currently in stock
- ❖ **Receiving/QA:** Items going through Quality Assurance review
- ❖ **In Process Inventory:** Items committed to other orders
- ❖ **Backorders:** Items already sold awaiting delivery to warehouse
- ❖ **Current available:** Items available for sale
- ❖ **Total Due In:** Items expected in warehouse and available for Backorder
- ❖ **Net Potential Inventory**: Items in Current Available + Total Due In

Status (Stat)

C1	Item is cancelled. All remaining stock can be sold.
C2	Item is cancelled. Item may show B/O status. Total Due In can be sold.
C3	Item is cancelled. All remaining stock plus Total Due In can be sold. Status will show as "Canceled".
K1 K2 K3 K4	Part of a Kit. Each piece will have a separate item number called a component. The availability of each component will be "0." Use the individual component numbers to check stock on them individually.
KC	Cancelled Kit. Kit contains at least one component that will not be reordered.
R1	Regular Item. Item will continually be reordered.
S1	Stop Shop. Items can be in this location for various reasons. Items in this status will not ship even if there is stock available.
T1, T2	Drop Ship. Item comes directly from vendor. Availability will be 0 in stock.
P1	Kit items that you could select various sizes, colors, etc.
R3	Any item that is purchased for a future order. Incoming or on hand future offer items.
R4	This status is for the current offering of WEB ONLY items. Items not offered in print.

Backorder Information

Backorder on a Regular (R1) Item:

These are regularly stocked items that are temporarily out of stock. The system will usually provide an **expected** arrival date, however, it is important to explain these dates are only **expected dates and are subject to change**.

Backorder items without/past due date:

If there is no expected ship date and it is a **R1** product status item, you can explain it is a regular item and we will be receiving more stock **within 2-3 weeks**.

Substituting a Backordered Item:

If a customer requests to cancel their backordered item and substitute a different item in its place:

- ❖ Select **F7 Secondary Options**,
- ❖ **F2 Order Options**,
- ❖ **F2 B/O Return Options**,
- ❖ **F2 Cancel B/O**,
- ❖ **F3 Subst. Product. Substitution** is permitted if item is of equal or lesser value to the item on backorder.
- ❖ Process substitution

- Backorder items cannot ship with expedited shipping. (No Rush, 2-day or Overnight delivery)
- Allow 24-48 hours for a quality check.
- Credit/debit cards are not charged until the item ships.
- Items on backorder with regular items will have prorated the shipping cost to cover each package.
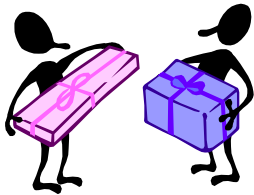
Gift Bags, Gift Boxes, Gift Wrap & Gift Certificates

Refer to the All Purpose sheet for item numbers and pricing.

Certain items cannot be gift bagged or boxed due to size, weight or shipping restrictions. Check the Upsell box for specific item information.

- ❖ The warehouse will choose the best size for the item.
- ❖ If there is more than one item going into the bag/box, select the line number for this box, and make sure to type in an order comment (**F6 Order Specials**, **F2 Enter Comments**). Explain to warehouse which items should go into the bag, using the item numbers and descriptions.
- ❖ If an item is backordered, the associated gift bag/box/wrap will automatically be back-ordered, as well.

To enter a gift bag, gift box or gift wrap:

- ❖ Type in the appropriate item number.
- ❖ The system will ask: "Do you want to Customize? Select **Function** key to answer"
- ❖ If the answer is **YES**, select **F4** and you will get the blue box that says: Gift Card Comment
- ❖ Type the message to be printed on the gift card into that box.
- ❖ Then the system asks: "Associate with product? [Ln#]". Type in the line number of the item that should be placed into the gift bag or box.

Gift Certificates

The gift certificate number is GC9999. A prompt will appear to enter the email address, first and last name, and message. If an email is entered, the gift certificate will be emailed to the customer. The first and last name fields are required.

Gift Message Cards

Offer a free Gift Message if the customer states the order is a gift or if the order is shipping to someone else. The gift message will automatically print out exactly as typed on a gift message card, and the card will be included with the item in the package.

Entering a Gift Message

❖ The item number for a gift message card is GC.

❖ **Type GC** on a line just as any other item number.

❖ The system will ask: "Product to be customized? Press Function key to answer."

❖ Select **F4 Yes**

❖ Selecting **F4** will bring up the small blue box. Type the message.

   o Example: "Happy Birthday, Jonathan!"

❖ Select **F1 Customize Complete**.

❖ The system will ask: "Associate with product? [Ln#]". Type in the line number of the item that goes with that gift message.

❖ Be sure to associate the Gift Message with the correct Ship-To in the **ST** column.

Your message will appear exactly as it is typed. Be aware word wrap is not an available feature.

To Review and/or Modify a gift message:
❖ F1 Order Options
❖ F3 Review Custom.
❖ Enter line number
❖ F3 Modify
❖ F1 Complete

Order Comments

- ❖ Select **F6 Order Specials**
- ❖ Select **F2 Enter Comments**
  See shortcut code handout for available code.

Note: Typing "X" in the PKS (packing slip), LBL (carrier's label) or WHS (warehouse) will print your comments in that specific area. Instructions for the warehouse must have an "X" in the WHS column or the warehouse will not see them!

Personalized Items

- ❖ Read the UPSELL box for delivery timeframe and holiday cut-off date.
- ❖ Personalized items **cannot** be expedited.
- ❖ All other items on the customer's order will not ship until the personalized item ships. Be sure the customer is aware of this.

When entering a personalized item, the system will prompt you to enter the appropriate information. Enter the information exactly as the customer wants it to appear on their item.

> Look on the website or in the catalog to become familiar with the items. Number of given character spaces is maximum allowed. All spaces, apostrophes, and hyphens count as characters. Follow guidelines specified for the item.

The **(MC)** advertised denotes the item is pictured with Mixed Case letters in the catalog.

The **(UC)** advertised denotes the item appears in the catalog pictured in "Upper Case" letters only.

Upon entering the personalization in the blue box, always confirm it by *phonetically* spelling it back to the customer (ex. T as in Tom, S as in Sam, etc.). If the system does not allow you to enter the personalization as the customer wants (ex. "MiMi"), comment the order with the exact personalization the customer is requesting and place the order in **Manager Review.**

- ❖ **F7 End Order**
- ❖ **F4 Postpone Order**
- ❖ **F2 Manager Review**

To view and/or modify a personalized item:

- ❖ **F1 Order Options**
- ❖ **F3 Review Custom**
- ❖ Select line number of item
- ❖ **F3 Modify**

Drop Ship Items
Status of Item: To Be Drop Shipped

❖ A drop ship item ships directly from the vendor.

❖ The delivery time frame and holiday day cut-off dates will appear in the Upsell Box.

❖ No expedited (Rush, 2-day, USPS Priority, etc.) processing or shipping is available for drop ship items.

❖ All drop ship items require a **physical address** (no P. O. Box), **phone number** and if available, an **email address**.

❖ Due to vendor policy, drop ship items cannot be shipped outside the contiguous 48 US states. Check the **Upsell box** for any shipping restrictions.

❖ Some drop ship items may incur an extra shipping charge due to size and weight. Check the **Upsell box** and advise the customer if the item incurs an extra shipping charge. These extra charges are shown in the catalog and website in parenthesis – ex. ($9.95).

❖ Gift messages, bags, boxes or wrap are **not** available for drop ship items.

❖ Drop ship items will have a Status of **T1** or **T2.**

❖ As these items ship directly from the vendor, stock availability will show as zero. This does **not** mean the items are out of stock.

All drop ship items require a **physical address** and **phone number**. Include an **email address** if it is available.

Section 10: Redeeming Promotional Codes

Applying Discount and Coupon Codes

Redeeming Discount Codes

Coupons using discount codes may be mailed to our customers for various customer service reasons.

Redeeming Discount Codes:
- ❖ F3 Pay Method
- ❖ F6 Discount Codes
- ❖ Enter code in the **DC** box.

Discount Codes	Catalog	Amount Discounted
A	What on Earth	$5
C	Signals	$5
H	Support Plus	$5
L	Catalog Classics	$5
K	Bas Bleu	$5

There are no coupons available for Daedalus Books or Shop PBS.

Deleting a Discount Code

- ❖ F3 Pay Method
- ❖ F6 Discount Codes
- ❖ Press the space bar one time
- ❖ F1 Product Entry

Only one discount or coupon code can be applied per order.

Redeeming Coupon Codes

We may send a letter when we are unable to send a customer's merchandise, or an email with a new promotion, or include coupon as an insert in the order. Only one discount or coupon code can be applied per order.

Example: 64thankyou for 10% off (printed on packing slip).

Redeeming Coupon Codes:
- ❖ **F3** Pay Method
- ❖ **F3** More Options
- ❖ **F2** Redeem Coupon
- ❖ Type the coupon code into the box.
- ❖ In the UpSell box, a message will appear saying "Coupon Processed Successfully".
- ❖ F7 Exit Coupon
- ❖ **F1** Product Entry

Deleting a Coupon

If the discount does not appear, do not reenter it:
- ❖ Select **F1** Browse
- ❖ Then select **F5** Delete Coupon

Free Shipping Coupons

Free Shipping
- ❖ Select **F6 Order Specials**
- ❖ **F5 Special P&H**
- ❖ Type 0.00 to remove shipping
- ❖ Enter
- ❖ Enter the promotional code in the order comments

Free Shipping Coupons with Percentage Off
- ❖ Select **F6 Order Specials**
- ❖ **F5 Special P&H**
- ❖ Type 0.00 to remove shipping
- ❖ Enter
- ❖ **F3** Pay Method
- ❖ **F3** More Options
- ❖ **F2** Redeem Coupon
- ❖ Type the coupon code into the box.
- ❖ In the UpSell box, a message will appear saying "Coupon Processed Successfully".
- ❖ Press enter
- ❖ **F1** Return
- ❖ Enter the promotional code in the order comments

Only one discount or coupon code can be applied per order.
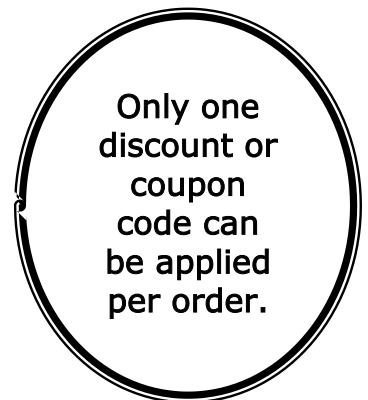
Section 11: **Shipping Methods**

Ship Methods

Delivery Types and Time Frames

To change a Ship Method: **F6 Order Specials, F6 Ship Methods**
The system automatically generates standard shipping of 6-9 business days. Expedited shipping is available upon request for an additional charge.

Shipping Options	When will the order arrive?	Carrier	Cost: Add standard shipping to expedited deliveries.
Ground Service (Code 96) FedEx @ Home (Code 10)	Allow 6-9 business days for delivery. See shipping calendar for date.	**USPS or DHL - 96** (FedEx Smart Post or DHL picks up at our facilities but USPS delivers.) The customer may request **FedEx @ Home - 10** at no additional cost.	Standard shipping is based on the cost of the order; refer to your All Purpose Sheet for pricing tiers.
Ace Express/Rush (Code 97) USPS Priority (Code 05)	Allow 3-5 business days if order is placed **before** noon EST. See shipping calendar for date	**(Ace Express/Rush - 97)** Delivered by FedEx **(USPS Priority - 05)** Delivered by USPS	Up to **$10.99** (See all purpose sheet) PLUS Standard S&H
2-Day Air (Code 90)	Allow 2 business days if order is placed **before** noon EST. Saturday is not considered a business day.	**FedEx**	All Catalogs **$19.99** PLUS Standard S&H
2-Day Saturday (Code 13)	Order must be placed **before** noon EST on Thursday.	**FedEx**	All Catalogs **$19.99** PLUS Standard S&H
Overnight (Code 98)	The order will be delivered the following business day if order is placed **before** noon EST. Saturday is not considered a business day.	**FedEx**	Up to **$29.99** (See all purpose sheet) PLUS standard shipping No Overnight to Alaska & Hawaii

In case a customer asks, our S&H fees are comprised of the following: Packing material, Warehouse Labor, Actual Corporate Postage Costs, and Insurance.

Specific Ship Request
(Codes 10, 97, 90, 13, 98 & 14)

If the customer requires a specific ship method, change by selecting the method required for delivery. **EX:** Customer states the US Postal Service does not deliver to their address, only FedEx. The change to **FedEx @ Home** (Code 10) would need to be manually entered. There is no additional charge for **FedEx @ Home**, which is considered standard ground service.

A **physical address** and **phone number** are required for all orders shipped via **FedEx** for standard and expedited ship methods.

Multiple Ship Methods

Enter all Ship-To addresses and make sure the Ship-To column (**ST**) is filled in with the correct recipient **before** entering ship methods.

The buyer is always **00** and the additional ship tos are assigned **01, 02, 03**, etc.

- ❖ **Press F6 Order Specials**
- ❖ **F6 Ship Methods**
- ❖ The first box prompts for the BUYER'S ship method. If sending to the buyer, enter in the correct ship method code that indicates shipping the buyer's method. (Example: Code **97** to send **Ace Express**)

The buyer's ship method will automatically carry forward to all ship to addresses unless changed.

- ❖ Go back to **F6 Order Specials, F6 Ship Methods**
- ❖ Select **F1 Select Ship To**
  - o The box appears asking Which Ship-To?
- ❖ Enter in the correct ship method code for 01
- ❖ Select **F6 Order Specials, F6 Ship Methods**.
- ❖ Select **F1 Select Ship-To**.
- ❖ Select the assigned ship to number – 01, 02, 03, etc.
- ❖ Enter in the correct ship method code for each Ship To
- ❖ Repeat the process until all Ship To addresses have been assigned a ship method.

Additional shipping charges apply to each Ship-To address.

Section 12: **Order Specials**

Order Specials
Hold Until Complete, Tax Exempt, Future Order

Select **F6 Order Specials** while in the order. Take notice of where the cursor is flashing. Select Enter key until the curser is over correct box: Hold until Complete, Tax Exempt or Future Order Date. Fill in the correct box as directed below.

HOLD UNTIL COMPLETE (HC)

Typing a **Y** will hold the entire order until all items are available including backordered items.

TAX EXEMPT (TE)
Typing a **Y** will remove the tax from the order but a Tax Exempt Certificate must be on file. See a trainer or supervisor for prior authorization.

We collect sales tax for most states.

FUTURE ORDER (FO)
Enter the date the customer would like the order shipped.
Ex: 01/29/13
This will hold stock on all items until shipment date (up to 90 days). Be sure to comment the order with the **FO** date requested.
NOTE: Drop Ship orders will not be sent to the vendor until the FO date!

Combining Catalogs

When a customer wants to order from multiple catalogs such as What on Earth and Signals, combine all items on one order as shown below.

- ❖ The key code for the first catalog would go in the Source Code field (**SC**).
- ❖ Enter all items from that catalog.

- ❖ On the next available Product Number Line type the key code from the second catalog (SPACE) and then type the item number.
  Ex: 1YHN006 (SPACE) HN5657

Using the different catalog codes will ensure that the customer is getting the correct advertised price.

Section 13: **Order Modifications**

Price Discrepancies

Upon encountering a situation in which the customer has a
different price than shown in the system, please follow these instructions:
- ❖ Check Where Advertised in Product Review or
- ❖ Check the catalog website or
- ❖ Check the catalog.

While in training comment (**F6 Order Specials, F2 Enter Comments**) the order with
the following information:
- ❖ Confirm the sale price for all items by checking "Where Advertised" in
  Product Review, catalog website, or catalog.
- ❖ Enter the item number or description, price it should be, and location where
  prices was verified.
  - ○ **Example:** Please adjust item # HB2552 to online price of $12.99"
- ❖ Place the order in F2 **Manager Review**:
- ❖ **F7 End Order**
- ❖ **F4 Postpone Order**
- ❖ **F2 Manager Review**
- ❖ Reason for not shipping: **P**

Price Override

A price override may be processed as necessary to reflect a current sale price or a
member's price that is not recognized by the system. This could also occur with
quantity discount items and personalized items. The advertised price must be
verified in Product Review, the catalog or website before processing a price override.
Once you have been authorized to override prices, follow the procedure below:

- ❖ On the Product Line enter a "**$**" and the item number (ex. $CK0082) and press
  Enter
- ❖ Enter the sale price or percentage off (ex. %20) and press Enter.

The discounted price will now show for that line item.

Comment the order with the short cut key code **505** (Price Adjusted to
WEB/CATA/THOR Sale Price).

Checking the Status of an Order

❖ From the Main Menu select **F5 Customer Service**
❖ Enter **OR** followed by the order number, then press Enter.
　　Example: **ORP1235200**

Reasons the order may not have shipped yet:

❖ Backordered item
❖ Personalized item
❖ Drop ship item
❖ Order is currently being picked and packed. (in warehouse status)

Comment the order (**F7 Secondary Options, F4 Comment Order**) with the short cut key code **503** (Customer Called To Check Status).

Tracking a Package

When a customer calls requesting the status of their package, you can track the package by copying (use mouse to highlight tracking number, in Thor edit & copy selection) and pasting the tracking number from the order comments screen (**F3 Order Comments/Actions**) onto FedEx.com and/or USPS.com. (Includes Drop Ship orders.)

You can also track the package on our catalog websites by clicking on the **"Order Status"** or **"Track my Order"** on the web page using the customer's **order number** and **billing zip code.** Clicking on "**click here to track with carrier**" will bring up a different screen showing current tracking information to be provided to the customer.

Comment the order (**F7 Secondary Options, F4 Comment Order**) with the short cut key code **503** "Customer Called to Check Status".

Levels of an Order

"Level" is a package shipped separately from the rest of the order.

If an order splits into levels, it is because of:
- ❖ Back Order items.
- ❖ Drop Ship items included with regular items.
- ❖ Shipping from more than one warehouse
- ❖ More than one ship-to address on the order

These situations will split the order into levels, or separate packages.

Always check to see if the order has levels when assisting a customer.
- ❖ Level 1 of 1 would indicate that all items are shipped together.
- ❖ Level 1 of 3 indicates that there will be a total of 3 boxes to ship.

To review each level on the order, select **F2 Next Level** or **F6 Back Level**.
If there are more than ten products ordered by the customer, select **F4 More Products** to view the rest of the items ordered.

On each level will be the product(s) that was in that package (i.e. Level 2 of 3).
Each level will break down the charges for the products, shipping fee and sales tax if applicable.

Modifying an Order

To modify ("recall") an order, you must first check its status.

An order cannot be modified once the status moves to "In Warehouse".

When an order is modified, the system will authorize the customer's credit card a second time. Make the customer aware of this **BEFORE** modifying the order.

Note any changes or the reason for modification in **Order Comments** and then end order. Enter code 03 (Update/Modify order) in C.S. Tracking when exiting the order.

Marketplace and PayPal orders should never be modified. PayPal orders will decline if modified and resubmitted; **before you modify a PayPal order, please advise the customer that they must provide a valid credit card to complete the order**. Credit/Debit card information should not be written down, given to customers or noted in any order comments.

To modify the order from the Main Menu:

❖ Select **F5 Customer Service**
❖ Enter customer's Order Number (ORP1234567 or ORPA123456) or Last Name (SPACE) Zip Code, then Enter to view customer's order
❖ **F7 Secondary Options**
❖ **F1 All Orders** (view a list of customer's orders)
❖ The cursor should be on the order that needs modified
❖ **F8 Secondary Options**
❖ **F5 Modify Order**
❖ Make necessary changes to the order as requested by customer
❖ Enter comments for the reason the customer called **(F6 Order Specials, F2 Enter Comments)**
❖ **F1 Return**
❖ **F7 End Order** – Accept, Reject or Continue from membership/program
❖ While in training, the order should be placed in **Manager Review**. After training, select **F7 Ship Order**.
❖ Select **F1** until you've reached the "reason" field
❖ **Reason:** 03, Update/Modified Order

Incomplete Orders

Incomplete orders are placed in the holding buckets for various reasons including: Missing Product Information, AVS Failure, Ship-to name/address verification, verification on personalized items, Credit Card decline, Invalid or missing payment method, Short paid mail orders, Credit Card in Warehouse Decline

An attempt to contact the customer via phone, mail or email has been made to complete the customer's order. Use the steps below when the respond:

❖ Review order comments/actions by selecting **F3 Order Comments/Actions.**
❖ Modify the order as needed then verify the rest of the order before it is shipped.
❖ Comment the order with any action that was taken.
❖ Ship if the issue is resolved.
❖ If the issue is still unresolved, note the order and place it back in Wait for Customer.

MPIs (Missing Product Information) - Mail orders and faxes missing product information including size, color, and product type such as t-shirt or sweatshirt and incomplete/unreadable information.

MPI
❖ Review the order comments to resolve the order.
❖ Type over the MPI on the product line with the item number from the order comments.
❖ Note the order and ship.

AVS Failure – (Address Verification System) Transaction failed because the billing information entered does not match the billing information listed with the issuing bank.

AVS FAILURE

Reasons
1. The customer may have recently moved.
2. Someone else may take care of their billing.

❖ The AVS order comments will display:
    EMAIL HAS BEEN SENT HAVE THE CUSTOMER VERIFY THE
    BILLING AND SHIPPING ADDRESS AFTER THE CUSTOMER
    CONFIRMS THE ADDRESS MODIFY AND SHIP THE ORDER

❖ Confirm the billing address matches address on customer's credit card statement and then modify and ship order. Unless, the comments indicate to only comment the order.

Ship-To Name/Address Verification

SHIP-TO CONFIRMATION

❖ Confirm/correct ship-to address including spelling and full physical address.
❖ **Note the order and ship.**

Invalid or Missing Payment Method

INVALID OR MISSING PAYMENT METHOD

Orders may be missing payment information due to an operator error on phone orders or to missing, unreadable, or invalid payment information on mail or fax orders. Pay method will be "XX".

Using Check:
Send check or money order "Attention: Mail Room" to our corporate office (see All Purpose sheet)

Credit Card:
Modify the order. Overwrite "XX" with credit card information and verify it to the customer. **Note the order and ship it.**

Verification on Personalized Items

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PERSONALIZATION VERIFICATION

Review the order and move the cursor to the item in question. To review the personalization:

- ❖ **F7 Secondary Options**
- ❖ **F5 Show Details**
- ❖ **F3 Show Cust Dtls**

or

While modifying the order:

- ❖ **F1 Order Options**
- ❖ **F3 Review Custom**
- ❖ Select the line number

If you need to change the personalization, press

- ❖ **F3 Modify Cstmaztin**
- ❖ **Note the order and ship.**

Customers may be calling because the Drop Ship Department has contacted them after the order has been submitted to the vendor. In these cases simply note the order and issue a CS Tracking follow-up using code **14 "Drop Ship Inquiry".**   Include the item number and order level in the CS Tracking comment box.

</div>

Short Paid Mail Orders

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SHORT PAID MAIL ORDERS

- ❖ A customer may pay this amount using a credit card, check or money order. When paying the balance using a credit card: Modify the order, then select
  - • **F7 End Order**
  - • **F6 How Paid Changes**
  - • Enter credit card information
  - • **Note the order and ship.**
- ❖ If the customer chooses to send in a check or money order, provide our corporate address, "Attention: Mail Room". The order number should be included on the memo line of the check or money order. **Note the account.**
- ❖ If the order has already shipped, add the credit card information in **Customer Maintenance.**
- ❖ Note the last 4 digits of the credit card number and expiration date in the order comments. Then issue a follow-up/ASAP using code **07 "Billing Inquiry."** Clearly state why we need to bill the customer.

</div>

Customer Maintenance

Customer Maintenance
Updating and Removing Credit Cards

Customer maintenance is used when a customer needs to update a credit card because it expired (including auto ship items) or could not be authorized. Credit card numbers may appear in a customer's account only for purposes of exchanges or refunds. If a customer has a credit card to be updated or if a customer insists that we remove their credit card number from their account:

- ❖ Choose **F6 Customer Maintenance** from the Main Menu.
- ❖ Search for the customer.
- ❖ Select the correct customer and put a **Y** in the change field.
- ❖ Enter the division number for the appropriate catalog.
- ❖ Select **F6 Maintain CR Cards**.
- ❖ Enter the division number for the appropriate catalog.
- ❖ Select the space bar over the card you wish to remove or enter the updated credit card information in the next available field.
- ❖ Select **F1 Update CC Info**.
- ❖ Select **F1 Update Customer**.
- ❖ Select F4 Bypass Standard
- ❖ Select F1 Continue

CC in Warehouse/Decline

CC in Whse/Decline

This status occurs when an item was on backorder and is now in stock. We attempted to process the backorder but were unable to obtain authorization on the credit card used when the order was originally placed.

On the **Mail order and Cataloging System** Screen
- ❖ Go into *Order Control.*
- ❖ Go into **Authorization Control**
- ❖ Select **F5 Manual Auth**
- ❖ Enter the customer's order number and "@" (Ex. PA123456@ or P5687848@).
- ❖ Select **F2 Change Crd Data** (enter the updated credit card information)
- ❖ Select **F8 Back To Auto**
- ❖ Review the order to make sure it has been updated.
- ❖ Note the order.

Note: To cancel these type of orders, issue a CS track follow-up using code 07, "Billing Inquiry".

Credit Card Decline

CREDIT CARD DECLINE

❖ **One** attempt for authorization is made.

❖ You may tell the customer the type of credit card and provide the **last four digits** of credit card number **only.**

❖ If the order was paid using PayPal, the customer must either provide us with their credit card information, or we can cancel the order and they can place it again online using their Pay Pal.

❖ Review the order comments/actions to view what is needed from the customer and the actions needed to resolve the issue.

❖ Comment the order prior to updating any credit card information.

❖ You will either **modify** the orders in Wait for Customer status or update the credit card information in **Credit Card Management** for Declined orders.

To Verifying and/or Updating in Credit Card Management:

- o Go into **Order Control.**
- o Go into **Authorization Control**
- o Select **F5 Manual Auth**
- o Enter the customer's order number and "@" (Ex. PA123456@ or P5687848@).
- o Select **F2 Change Crd Data** (enter the updated credit card information)

Note: PayPal orders in Credit Card management, space over the authorization code "0000" prior to selecting "Back to Auto".

- o Select **F8 Back To Auto**
- o Review the order to make sure it has been updated.
- o Note the order.

Order Comments Displayed on Pending Orders
1. NO MATCH ON SECURITY – CREDIT CARD DECLINED
2. HAVE CREDIT CARD AUTH HOWEVER NO MATCH ON SECURITY
3. MATCH ON SECURITY – CREDIT CARD DECLINED
4. CVV NOT GOING THROUGH
5. CVV NOT AUTHORIZE
6. CREDIT CARD DECLINE

Credit/Debit card information should not be written down, given to customers or noted in any order comments.

Cancelling an Order

To cancel an order, the order must be open, and you will need to modify it. **If the order is no longer open, it cannot be modified.** To cancel an open order:

❖ The Pay Method field must be filled to keep details. Leave original credit/debit card information or enter XX if none given.

❖ In the order comments, note the order for the reason of cancellation. (See reference for list of codes)

❖ Select **F1 Order Options**

❖ Select **F7 Cancel Order**

❖ **F4 Keep Details**

❖ Then a small box will appear asking: "Reason for cancel?" Type "?" to view the full list of reasons and enter the most appropriate code.

FTC Wait
FTC 30/60-Day Rule
(Federal Trade Commission)

When an item has been on backorder for 30 days we mail a letter informing the customer their item is in backorder status. When the item is nearing 60 days on backorder, FTC requires us to contact the customer via mail or email. The customer must notify us if they wish to keep their item on back order. If the customer wants to keep the item on backorder, we issue an FTC Wait. This will allow the item to be held for an additional 60 days. If the customer does not respond, the order will be automatically cancelled.

FTC Wait Process:

❖ Access customer's order
❖ Select **F7 Secondary Options**
❖ **F2 Order Options**
❖ **F3 FTC Wait**
❖ Enter line number 999 for all items. There will be no confirmation.
❖ Review by selecting **F3 Order Comments/Actions** to make sure the FTC Wait was issued.

The order actions will show that an FTC Wait was issued.

You must process an FTC Wait when a customer responds to the FTC Card. Simply commenting the order will not keep the item on backorder.

Customer Service Tracking

When reviewing orders, **comment the order** and enter a reason code (see following page) in the Customer Service Tracking screen labeled "reason". If additional follow up is needed, the appropriate department will address the issue based upon the tracking code and follow-up scheduled.

Issuing a Customer Service tracking follow-up:

- ❖ When issuing a follow-up, after **F1 Order Entry** is selected and the C.S. Tracking is opened, enter the appropriate code. **Unless otherwise specified, comment only the order and not the CS tracking comments.**
- ❖ Select **F3 Schedule Follow-up**
- ❖ **F3 ASAP**.

The appropriate department will respond based on the C.S. Tracking within 24-48 hours.

Upon selecting **F1 Order Entry**, Customer Service Tracking will open. Enter Customer Service Code. Select **F1 Update & Return** to return to the Main Menu.

Customer Service Tracking Codes

Code	Reason	CS Inquiry Comments (blue box)	Follow up	Order Comments
01	B/O Inquiry		NO	
02	Order Status		NO	Shortcut Code **503**
03	Update/Modify Order		NO	What was changed on the order
06 for items in our warehouses **14** for Drop Ship items	Product Inquiry	Item number and exact information the customer is requesting	YES	Item number and the exact information the customer is requesting
07	Billing Inquiry		YES	Information needed to assist the customer
08	Customer Maintenance		YES	The type of card and the last 4 digits of the card number.
09	RTS		NO	Comment the order with information to either reship or refund the returned order
10	Coupon Request	Catalog Brand and the amount of coupons to send	YES	Note the catalog brand the coupons are associated with and reason for sending the coupons
11	Non-Receipt/Damaged	Item number, description and level	YES	Information regarding where the item is damaged and the condition of the package
12	Smart Label		YES	Mail or Email? Level & Item #, Comp or Paid? Reason why?
13	Mail Verification	Note what should be verified on mail order	YES	Information needed to assist the customer
14	Drop Ship/Truck	Item number, description and level	YES	Any additional information needed to assist the customer
17	Return Information		YES	Verification of the returned packing slip
18	Quality/Service		YES	Note the customer's feedback
21	Supervisor Review	None	YES	All information needed to assist the customer
22	Checks & GC	Note the situation	YES	Note the situation
23	Marketplace Inquiries	Note what needs to be done	YES	Note what needs to be done
25	Urgent Catalog Request	Catalog brand(s)	YES	Catalog brand(s)
28	Email Customer	Customer requests an email confirmation of their order.	Yes	After confirming email address, comment exactly what should be emailed.
30	Old DAE/Acorn	Note the issue and date of order	YES	Note the issue and date of order.

*Product Inquiry

If a customer calls requesting product information but they are not in the system, build them in, including a phone number and email address. You can then issue the CS Track from their account. Include the item number/description and specific information requested in the CS Track comment box and issue a follow-up.

California PROP 65 FAQ

Prop 65 is a prompt that will appear when placing phone orders for California customers. These prompts will only appear when a customer is from or is shipping their order to California.

The necessary information to relay to the customer will appear in the upsell box.

Q. What to do if a customer calls regarding a Prop 65 item?

A. Explain to customer, "California Prop 65 requires us to inform you that cadmium (**kad**-mee-*uh* m) and lead may be present in the product you ordered." As a precaution, every order that is shipped to California has the Prop 65 warning on the packing slip. If an item does fall under the Prop 65 guidelines, the vendor will attach a sticker directly on the item. If there is no sticker on any of the items within the order, the customer can ignore the Prop 65 warning and enjoy the item.

Q. What Kind of items are Prop 65 items?

A. Anything with an electrical cord is classified as a Prop 65 item. Other items are decorations that are glazed or ceramic, lead crystal (Waterford crystals), and painted items. For Example: the Numbers Mug.

Currently, all of our items coming from China are being tested for our customer's safety. Any item to be found unsafe has been removed from our catalogs.

Q. What can we do for the customer?

A. If, after explaining the Prop 65 information, the customer wants to return the item(s), please transfer to Customer Service extension **4053**.

Section 14: References

Order Numbers
Guide

All orders placed by **phone**, regardless of which catalog, will start with the letter **P**.

Key/Source Codes

Acorn	N
Acorn Canada	D
Bas Bleu	B
Catalog Classics	C
Daedalus Books	L
Shop.PBS	V
Signals	S
Signals Canada	H
Support Plus	P
What on Earth	W

Mail Orders

Acorn	R
Bas Bleu	N
Daedalus Books	E
Shop.PBS	M1
Signals	G
Support Plus	Y1
What on Earth	W

Marketplace Orders

All begin with the letter "A".

Amazon
Ebay
Google Express
Houzz
Overstock
Rakuten
Sears
Walmart

Internet Orders

Acorn	R
Bas Bleu	U
Daedalus Books	E
Shop.PBS	M3
Signals	H
Support Plus	Y6
What on Earth	I

Marketplace & Order Box

Marketplace

We are currently selling a variety of our items on online Marketplaces such as Amazon.com, eBay.com, Walmart.com, etc. These online orders are referred to as Marketplace orders since they are not through our catalogs or our websites. These orders are received as pre-paid and are packaged and shipped by us, Universal Screen Arts. We handle 99.9% of the customer service issues with these orders.

We use the brand name of <u>Universal Direct Brands</u> on these sites. Universal Direct Brands is just another name that we sell our goods under like Signals, Support Plus, Bas Bleu, Catalog Classics, etc.

To determine which marketplace the customer placed their order through, look at the "Entered By" spot in the column under the phone number. Marketplace sites will be:

Amazon	eBay	Wal-Mart	Rakuten
Overstock	Houzz	Google Express	*Order Box

Marketplace orders can be easily identified by the letter "A" at the beginning of the order number. Any marketplace order will start with the letter "A." Note: This letter does NOT stand for Amazon.com orders. (Please note: Any replacement order done for a Marketplace order will still have a "P" order number.)

Order Box

Any order numbers beginning with "D", please provide these customers with the Order Box customer service number, **1-844-304-7878**. Our stock is sent to an Amazon facility. They handle the billing and shipping of these orders. If a customer should contact us via a catalog line, it is imperative to provide the Order Box customer service number. Due to the contract we have with Order Box, we cannot contact customer via phone or email. Therefore, a CS track using code 23 "Marketplace" is not needed.

Universal Direct Brands

Customer Service Inquiries & Tips

Pre-authorizations
If a customer is calling because they see the same amount pending on their credit/debit card, this could possibly be a pre-authorization. Search for the customer in Thor using their name and zip code, last name and zip code, first name and zip code, etc. until you find another account for the same items being ordered or another order with the same price. If there is not another order, please explain to the customer the additional authorizations will reverse within the next 3-5 business days.

Can we bill a customer twice for their drop ship item?
No. We do not bill the customer until we receive confirmation from the vendor that the order has shipped. Sometimes these confirmations can be delayed and the item is delivered to the customer before we are alerted that the item has shipped. Once they are billed, an automatic "shipping confirmation" email is sent to the customer. The customer can disregard the email if the item has already been received.

Can a customer place a phone order on hold until we receive their check to pay for it?
No. All orders using a check or money should be place through the mail. We will not place orders on hold.

Online Orders
Online orders take approximately **one hour** to download. Once downloaded, customer' can make any necessary changes to their order.

Online Email Promotions
Online email promotions should be used for online orders only. If the customer is experiencing problems with applying the coupon code online, we will honor it over the phone. **One coupon per order!**

If a customer calls inquiring about any promotions for free shipping, discounts, etc., explain we do not have any current promotions; but they can sign-up to receive email promotions via our website.

Product Not on File
If when entering item and the UpSell box shows "Product Not on File", there is another way to add the item. On the product line, enter item as shown below:

Ex: AM6481 TL, HW0162 DV, CC4382 PS
Enter the item number, space, the letter for the style (i.e. T for tee shirt S for Sweat shirt) followed by the size. The full item numbers are shown in Thor in Product Review, Keyword Search.

Acorn TV

If a customer calls with questions about or problems and concerns with Acorn TV please provide Acorn TVs customer service number, 1-888-370-2597. When customers state they're an Acorn TV member and suppose to receive free shipping, we can remove the shipping from their order. (**F6 Order Specials, F5 Special P&H**, type the amount for shipping).

How packages are return at the customer's expense?

Customers can use the optional prepaid Smart Label printed on their packing slip. The $8.95 fee will be deducted from their original form of payment.

How do we assist customers who have difficulty communicating?

We make an attempt to assist them. If you are unable to assist them, the customer can contact us on the web (pacing an order, chats, and emails) or through the mail.

Can a customer pick-up or drop-off packages at any of our facilities?

Items cannot be picked-up or dropped-off. We do not have retail license and insurance for this service.

Vendor Information

We do not disclose vendor information to customers.

Bas Bleu Year of Books program

The customers can choose to receive the books of their choice (i.e. Mysteries or Novels) on seasonally or all at once. There will be different item numbers for the all at once selections and the seasonal selections.

Accounts Marked as "Bad Customer"

This information **should not** be relayed to the customer. Instead of shipping these orders, place them in Manager Review.

Reasons: History of abused or incomplete orders
- Credit card declines
- NSF
- Excessive returns

Placing an Order in Manager Review:
- F7 End Order
- F4 Postpone Order
- F2 Manager Review
- **Reason:** B

Bas Bleu Society Membership Online

Customers will need to validate their membership only once prior to placing an online order.

<u>To Validate the Bas Bleu Society Online</u>

❖ Click on the link, Bas Bleu Society Sign Up and Get FREE SHIPPING icon on website.

❖ Existing Bas Bleu Society Members: **Click here** to validate your membership.
❖ The customer will need to enter their Customer Number, E-mail, Last name and Zip Code.

On-Demand

An "on-demand" shirts are printed when the specific item is purchase. These items are not pre-printed.

VIP Insider Program Cancellations

When a customer calls to cancel their VIP Insider program, please transfer them to the appropriate customer service number located on the bottom of your Clarus script. If customers are experiencing problems with the cancellation process, please email call@woecatalog.com (providing the customer's name, address and order #) or schedule follow-up ASAP on **Track 21 Supervisor Review**.

Return Policy & Instructions

Our customers' satisfaction is our most important goal. Most items may be returned at any time for an exchange, refund or credit.

❖ Personalized items cannot be cancelled or returned; however, in the event it arrives damaged or defective, we will happily send out a replacement.
❖ Media (CDs, DVDs, Blu-ray discs) must be returned **unopened** for refund. Defective media may be exchanged for the same title.
❖ Personal care items and footwear must be returned in original unworn condition, within **60 days of receipt**. They must be tried on inside on a carpeted surface.

Each order contains a packing slip with a return form on the back (except orders that were Drop Shipped). Customers should fill out the return form and return it with their merchandise. Return labels are located on the front of the packing slip at

the bottom and return instructions are located on the back above the return form. Returns take 2-3 weeks to process.

Marketplace

Hours of operation:
Monday – Friday: 9am – 9pm

When to issue a Marketplace 23 track?
A CS track 23 for follow-up can be used when calls are received outside the hours of operation on an issue that includes but is not limited to: Miscellaneous credits, billing inquiries, backorders, cancelled orders, Marketplace Drop Ship issues, and International Customers. Please leave notes for the agent and it will be resolved with the customer as they can be contacted through the Marketplace site. **Should not be used for Order Box (Order numbers beginning with "D") orders.**

Reminders when handling Marketplace calls:

- Obtain the order number that begins with the letter "A"
- Verify customer's name and billing address
- Identify the specific Marketplace site in THOR (i.e. Amazon, Jet, etc.)

Cancellation Reason Codes

24	WBO Cancel	Used when an order was "in warehouse" status moved to backorder status.
CC	Card Declined	Credit card decline or invalid (XX in payment) card used.
DB	Delayed Backorder	Cancellation of backorder due to delay or the item being on backorder. FTC Wait cancellation.
FD	Fraud	Fraudulent order placed. (Used by Fraud dept.)
OE	Operator Error	Order entered in error.
SL	Service Level	Not used.
AV	AVS Failed	AVS failed and customer decided to cancel the order.
CM	Changed Mind	
DU	Duplicate Order	Duplicate order placed.
FE	Found Elsewhere	Item found elsewhere (local retail), in some cases when our item is on backorder.
OS	Out of Stock	No longer available, not expect a shipment.
TP	Technical Problem	Modified order experiencing problems. (I.e. frozen screen,
CB	Cancel Backorder	Customer's request to cancel backorder.
CR	Customer Request	
FC	Found Cheaper	Cancelled when customer decides to not price match and order with a different company. We can price match competitors original price, not sale price.
NR	No Reply	Used when resolving "Wait for Customer" orders. We made several attempts to contact the customer to complete their order and there was no reply from the customer.
SF	Suspected Fraud	Suspected Fraudulent order placed. (Used by Fraud dept.)
WU	Warehouse Update	Not used.

California Consumer Privacy Act

On January 1, 2020, the California Consumer Privacy Act (CCPA) went into effect. The CCPA allows any California consumer to demand to see all the information a company has saved on them (disclosure), request complete removal of all their information (deletion) or both. Since we served California customers, we are required to comply with the customer's request(s) within 45 days.

The CCPA requires us to disclose and/or delete information we have on a customer from the last 12 months. On all of our sites under the "Privacy", customers are able to make a request for disclosure, deletion or both.

Privacy: https://www.signals.com/info/privacy.hzml
Your California Privacy Rights: https://www.signals.com/info/privacy.hzml
California Privacy Request: https://www.signals.com/info/subjectrequest.hzml

How to assist a customer over the phone?
When California customers call to have their name removed from the mailing list, continue to update the "No Rent" and "No Promo" fields on all of their accounts. If the customer requests to have their information disclosed or completely deleted, please access the online form on our website and submit their information.

First Name *

Last Name *

Address *

Address 2

City *

State * Select One

Zip/Postal Code *

Request for Disclosure

Request for Deletion

Submit