

# SC Order Taking

<b>F Key Usage in an Order</b>
F1 - Apply/Return to 1st page of order (Buyer information page)
F2 - Move forward 1 page
F3 - Move back 1 page
F4 - Return to previous screen
F5 - New Date/Greeting screen
F6 - Blank Item screen
F7 - Gift Shopping Screen
F8 - Delete (Press twice)
F9 - Help key
F10 - Summary page. Upsell will be displayed the 1st time on the Summary Page. Payment Page from the Summary Page. Toggle between Order Totals & Summary pages.
F11 - Displays Upsell the 2nd time you go to the Summary Page
F12 - Exit the help screen and the Thank You screen (Exit Order)
PAGE UP- Gives F Key Usage Help
ENTER - New page
TAB – move the cursor to the next field
Ctrl - Can't type on bz - check bz bottom line should be Ready

# Part I – Intro to Main Menu & Screen Pops

## 1. SC Data Pop

The screenshot shows a window titled "SC Data Pop" for "Ginny's". It contains several sections:

- 1** Hello my name is **M Mouse Chris** (Callout: Company)
- 2** Call Reason Status: **PLACE\_ORDER** (Callout: Reason for CALLING)
- 3** Account Information: Account or EZ #: 109412233729, Order Number: Name: Renee,Hall, Address Verified? Y, Email Address Verified? N, Phone 1 Verified? N, Phone 2 Verified? N, Calls Last 7 Days: 0 (Callout: Customer Information - Verify all the information highlighted in yellow)
- Notes: M Mouse Chris 2/8/2018 11:10:50 AM:
- Call ID: 3004360151

In this example:

Company - Ginny's

Reason for Calling – PLACE\_ORDER

Customer information that needs verification – email address, phone 1 and phone 2

## 2. Main Menu

2.1 After logging in

2.2 Press **Pausebreak**

2.3 Type **CUS3** and press **ENTER**

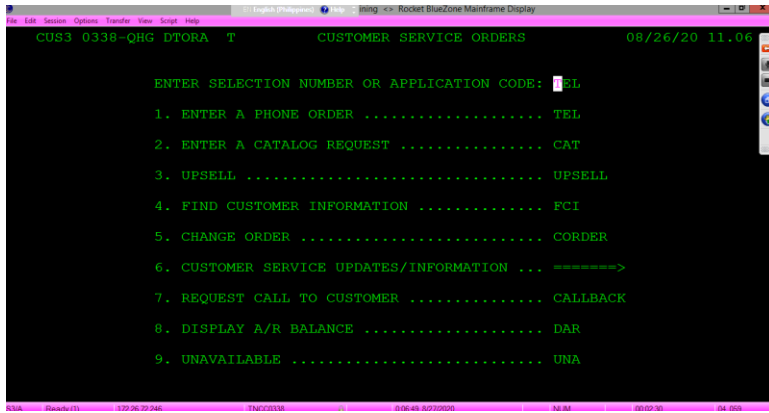
The screenshot shows a terminal window titled "Rocket BlueZone Mainframe Display". The screen displays the following text:

```
CUS3 0234-QHG DTORA T          CUSTOMER SERVICE ORDERS          08/24/20 10.25

ENTER SELECTION NUMBER OR APPLICATION CODE:

1. ENTER A PHONE ORDER ..... TEL
2. ENTER A CATALOG REQUEST ..... CAT
3. UPSSELL ..... UPSSELL
4. FIND CUSTOMER INFORMATION ..... FCI
5. CHANGE ORDER ..... CORDER
6. CUSTOMER SERVICE UPDATES/INFORMATION ... =====>
7. REQUEST CALL TO CUSTOMER ..... CALLBACK
8. DISPLAY A/R BALANCE ..... DAR
9. UNAVAILABLE ..... UNA
```

3. Type **TEL** and press **ENTER**



## Part 2 – EZ# and Customer Information



Company

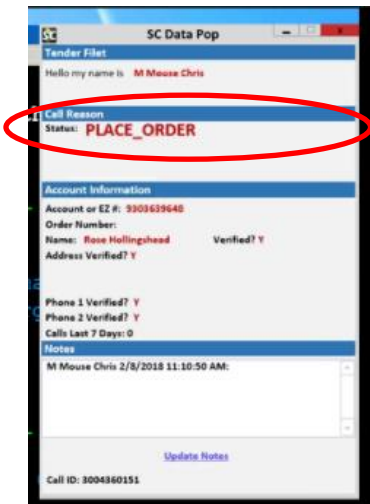
Reason for Calling

Customer Information

List of information that you need to verify.

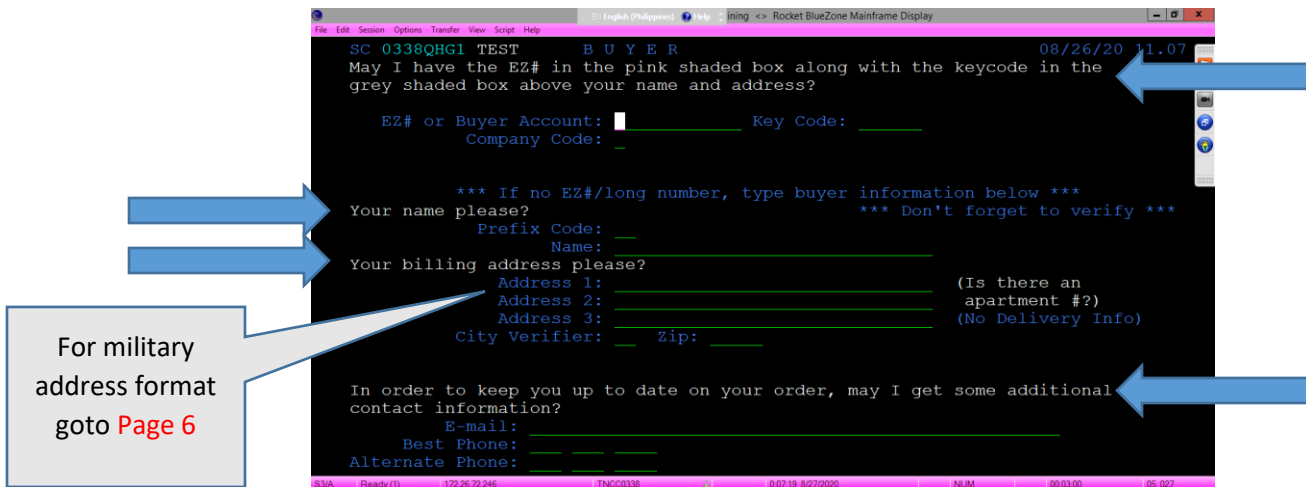
- Highlighted in yellow
- Verified? N

Please NOTE that NOT all order requires the **Key Code**



# Part 3 – Buyer Screen

1. Follow the script (WHITE)



- a. Verify all the information that are highlighted in the SC Data Pop.
- b. All information that you type on this screen needs to be read back to the customer for confirmation.
- c. If the caller is NOT the BUYER, goto Page 7



- 4.2.1 Type the EZ# and Keycode – press **TAB**
- 4.2.2 Type the Company Code
- 4.2.3 To get the company code, Press **F9** for HELP – Press **F12** to exit HELP
- 4.2.4 Press **ENTER**
- 4.2.5 Customer Information will be available on your BlueZone screen.
- 4.2.6 Verify the Customer information. Use phonetics on email to get the correct email address.

**IMPORTANT: Read back each information you type on this screen.**

Customer : My best phone number is 608-12345678 (type the phone number)

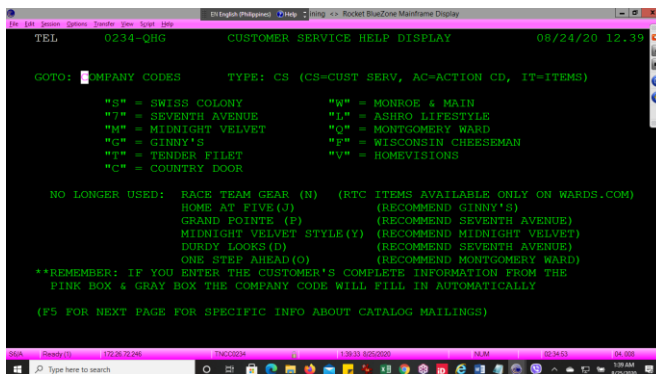
Agent : That will be 608-12345678

*Use phonetics on email to get the correct email address*

**DO NOT:**

- Thank the Customer for calling, the IVA has already done this.
- Do not use the Catalog Name in your greeting, the IVA has already done this.
- Do not ask How may/can I help you, unless there is not a clear intent in the SC Data Pop.
- Do not ask, Is this Correct?, after stating the intent of the call.
  - State the intent and then ask another question that will drive the call forward.
- Ask the Customer to verify information that is marked with a "Y"
  - The IVA has already verified this information.
- Ask the Customer for information that is not showing in the SC Data Pop, such as an email address or 2nd phone number.
  - The IVA asked the Customer for this and they stated they didn't have one.
- Ask for the Key Code, "unless" the SC Data Pop directs you to.

2. Press **F9** for HELP and **F12** to exit HELP



3. If the customer doesn't want to provide the information. Press **ENTER** for additional script (WHITE or TEAL)

- **Need screen shots** -

4. Press **F1** to apply all the changes then **ENTER** to go to the next page.

Return to the Buyer Screen

**F1** on any screen in a order to return to the Buyer Screen.

## Ordering on Someone Else's Account

Spouses may place an order or check on an order as long as he/she can verify the appropriate account information.

If it's anyone else - permission **must be** granted before you can place an order or give out order information using someone's account.

### For Example:

Daughter wants to place an order using her mother's account.

"May I please speak to your mother to get her permission?"

- If you **are able** to speak to her and she gives permission you can place the order.
- If you **are unable** to speak to her, kindly explain that you are not able to continue without the account holder's permission.

### Married Couples:

- If the person on the phone says that they are the customer's spouse, you do not need to speak with the customer. Simply place the order as if you were speaking with the customer.
- We do not ask for proof. We believe them. **Remember:** The customer is always right!

### Other Friend/Family Member:

- If someone else is calling to place an order on the customer's account, such as a neighbor, brother, daughter, girlfriend, fiancé, we need to speak with the customer before the order can be placed.

***Offer to open his account with Colony Brands.***

## Military Address Information

Military Addresses should be in the following format:

**Prefix Code:** Military Rank abbreviation

- Example: Sergeant="X\_", Colonel="O\_", etc. Use <F9> to get the Military Rank abbreviations.)

**Name:** Full Name

**Address 1:** This must include "UNIT," "CMR," or "PSC", as well as, "BOX," followed by the Box Number.

**Address 2:** Blank

**Address 3:** Blank

**City Verifier:** "AP" = APO, "FP" = FPO, or "DP" = DPO, depending upon the information the Customer gives.

**Zip Code:** The 5-digit Zip Code, provided by the customer.

To set up a Military address on an order:

**CUSTOMER WILL SAY:**

SERGEANT KEVIN BEASLEY  
UNIT 2050 BOX 4190  
APO AP 96522-1215

**YOU WILL TYPE:**

PREFIX: **X** (F9 to get the list of prefixes)  
NAME: **KEVIN BEASLEY**  
ADDRESS 1: **UNIT 2050 BOX 4190**  
ADDRESS 2:  
ADDRESS 3:  
CITY VERIFIER: **AP** ZIP CODE: **96522** ZONE:  
CITY: STATE:

**Additional Information**

- Items to military addresses cannot be expedited
- Normal delivery time for items going to APO/FPO/DPO address is 3-4 weeks.

## Part 4 – Date Screen

This is where you will enter WHERE and WHEN the Customer would like their item(s) shipped.

```
MW 5295QEZ1 TEST BUYER DATE 08/13/18 11:00
Estimated arrival is 08/13/18 on all in stock inventory

BUYERS NAME: LILLIE JOHNSON
Will any of the items be shipped to the billing address? (Y/N): Y
ARRIVAL DATE/CODE: N (N=Now, T=Thanksgiving, C=Christmas, MM/DD/YY)

IF ASKED, POSTAGE CODE:
(FH=FedEx Home, P=Parcel Post, E=3-4 Day Expedited Delivery 9.95,
FN=1-2 Day Premium 19.95, Press F9 for more info)
```

### Multiple Arrival Dates to the same address:

- If the Customer wants multiple shipments to the same address (*Example: one for now & one for Christmas*) we are able to do this, without entering all of the shipping information again.
- From a blank item screen, after the first shipment is complete, **F5** will bring up the Giftee Date Screen. You may type your 2nd arrival date to that address.

All dates are **ESTIMATED** (NOT Guaranteed) Arrival Dates/Times

Standard Delivery (N): 3-7 Days

Priority Mail (P): 4-5 Days

FedEx Home (FH): 3-7 Days

2-Day Air (E): 3-4 Days

1-Day Air (FN): 1-2 Days

### 1. Read the script

If YES (Y) then press **ENTER**

If NO (N), change to N then press ENTER (Proceed to Giftee Screen)

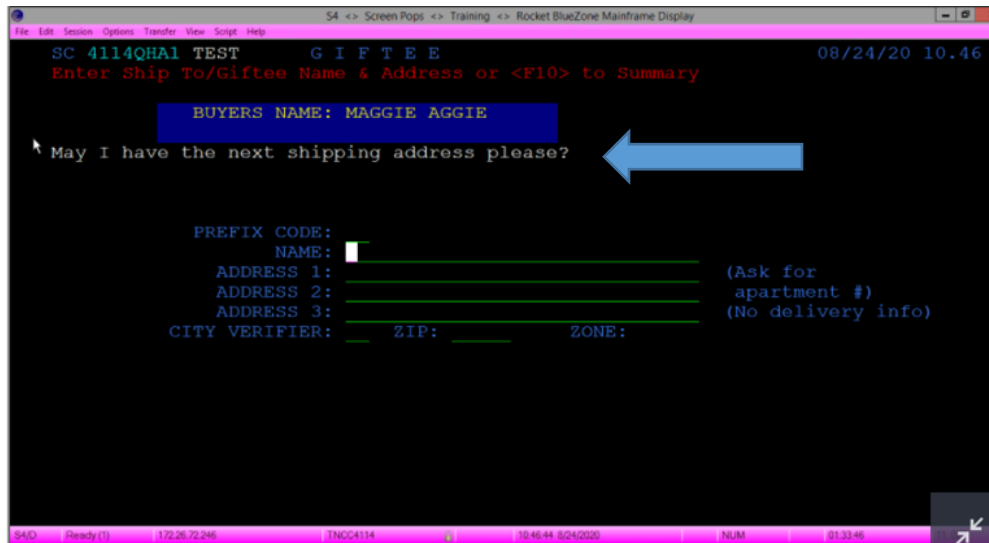
### 2. ARRIVAL/DATE CODE

Non-Food orders: Default to **N** now delivery Food Order:

You must ask "When would you like these items to be received?"



## Part 5 – Giftee Screen



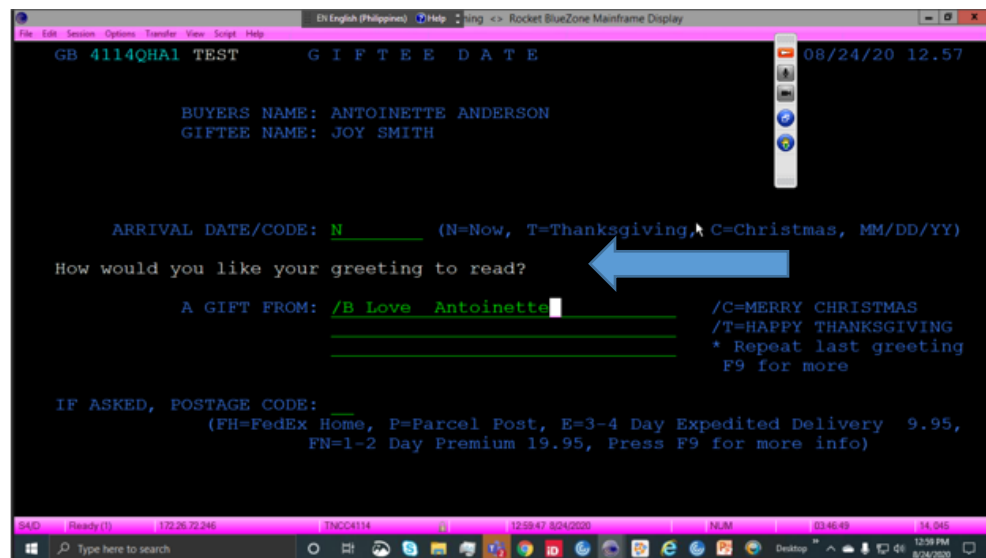
Put the needed information and press **ENTER** to save or **F10** to go to Summary Page

### 3. Giftee Date/Greeting Screen

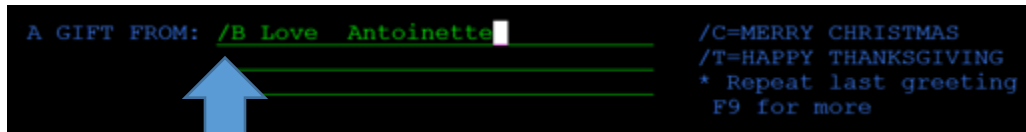
Always read the White Script:

*“When would you like these items to be received?”* on Food Orders  
*and/or*

*“How would you like your areetina to read?”* on Food & Non-Food Orders



Use the shortcuts for the greetings – Press **F9** for the list



*	Duplicate Previous Greeting**	/V	Happy Valentine's Day
/C	Merry Christmas	/E	Happy Easter
/T	Happy Thanksgiving	/M	Happy Mother's Day
/H	Happy Holidays	/F	Happy Father's Day
/B	Happy Birthday	/A	Happy Anniversary
/N	Happy New Year	/W	Best Wishes
/K	Happy Hanukkah	/Z	A GIFT FOR YOU

\*\*To Duplicate a greeting use the asterisk:  
First you must enter the greeting for the first giftee.  
Then on the following giftees you only need type in \*. DO not space and then type \*.  
You must type the \* in the first space or the duplicate process will not work.

A Greeting is a message from the Customer to the recipient (Giftee) and is the only way the Giftee will know who sent the item(s). You must include the Customer's name in the Greeting.

- If the Customer does not include a name, ask them "How would you like that signed?"
- 

If no greeting is entered, the greeting will default to the Customer's name only. Always use **Greeting Shortcuts**.

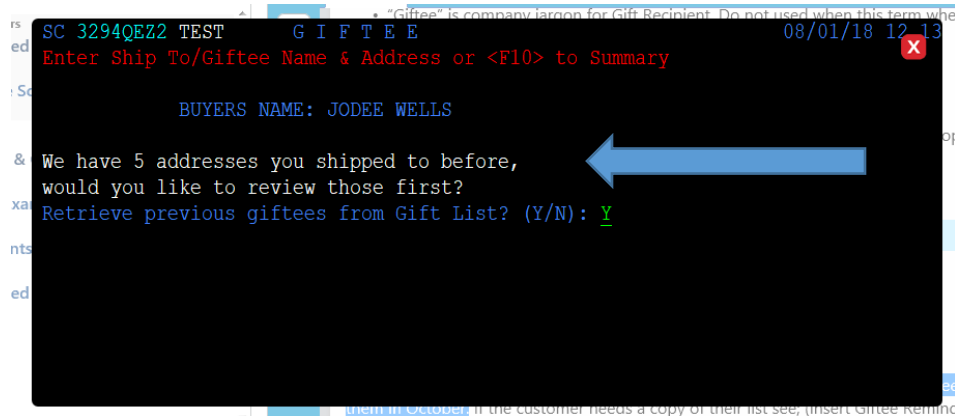
- Greeting Shortcuts eliminate spelling errors.

**Remember: Verify! You typed it, you spell it back.**

4. Press **ENTER**

## 5. Previous Giftees

Swiss Colony Customers who have shipped to giftees in the past will receive a giftee reminder list mailed to them in October.



Press **F11** is the customer started to give a new name and proceed with typing the giftee information

## 6. Duplicate Items to a Different Address

If you need to duplicate items to a different address:

(i.e. You entered items to the Customer's address but they need to go to a giftee address)

1. Type in the name & address you want to send to in the Giftee address fields.
2. **F2** to the Date & Greeting screen of the items you want to duplicate.
3. **F5** twice to duplicate.
4. **F8** to delete what you are duplicating
5. **F4** to move to new date & greeting screen.
6. **F2** to page forward.
7. Continue with order as normal.

## Part 6 – Item Screen

```
MW 3295QEZ1 TEST      B U Y E R   I T E M      08/01/18 11.35
Buyers Name: LILLIE JOHNSON
Arrival Date: N

May I please have the first item number you wish to order?
    Item: _____
    Quantity: _____ (1 is assumed if no quantity entered)
    Price:
    Page:

Anymore items to this address? (Y/N): Y (Enter for next item, F5 for New Date,
                                         N=Next Giftee or End Order)
                                         (U=Upsell)
                                         Available Credit= 394.00      Item Total= 0.00
```

1. Item Number is a combination of PREFIX and PRODUCT NUMBER

```
Item: S9758726
Quantity: 1 (1 is assumed if no quantity entered)
14K Gold Nano Diamond Resin Modern Hoops
Price: 249.99
Page: 910 Postpaid Item
```

PREFIX – S

PRODUCT NUMBER – 9758726

Always verify the Name and the Price of the item.

- Do not verify the Page number from the catalog. This is only for your reference.
- Do not ask for the quantity of the item.
  - Always assume the Customer wants one, unless they tell you differently.

## 2. Personalized Items

Some items in our catalogs allow a personalization to be added. If the personalization is optional, there is an additional fee to personalize. For more information see; Goto **K-Center** and search [Personalization Fee](#)

The system is set to only allow a certain number of letters and spaces per item. To find how many letters & spaces are allowed on each item, **F9** for the Help screen.

- If the Customer's personalization request doesn't fit in the spaces allowed:
  - It is your job to inform the customer that the personalization does not fit.
    - If you enter a personalization that is too long, the order will not process.
    - This will cause a delay on the order and possibly a cancellation of the order.

- Need screenshot -

### To correct/change a personalization:

- **SPACE BAR** through the incorrect entry
  - You cannot use the End of Field key or the Backspace key to remove it

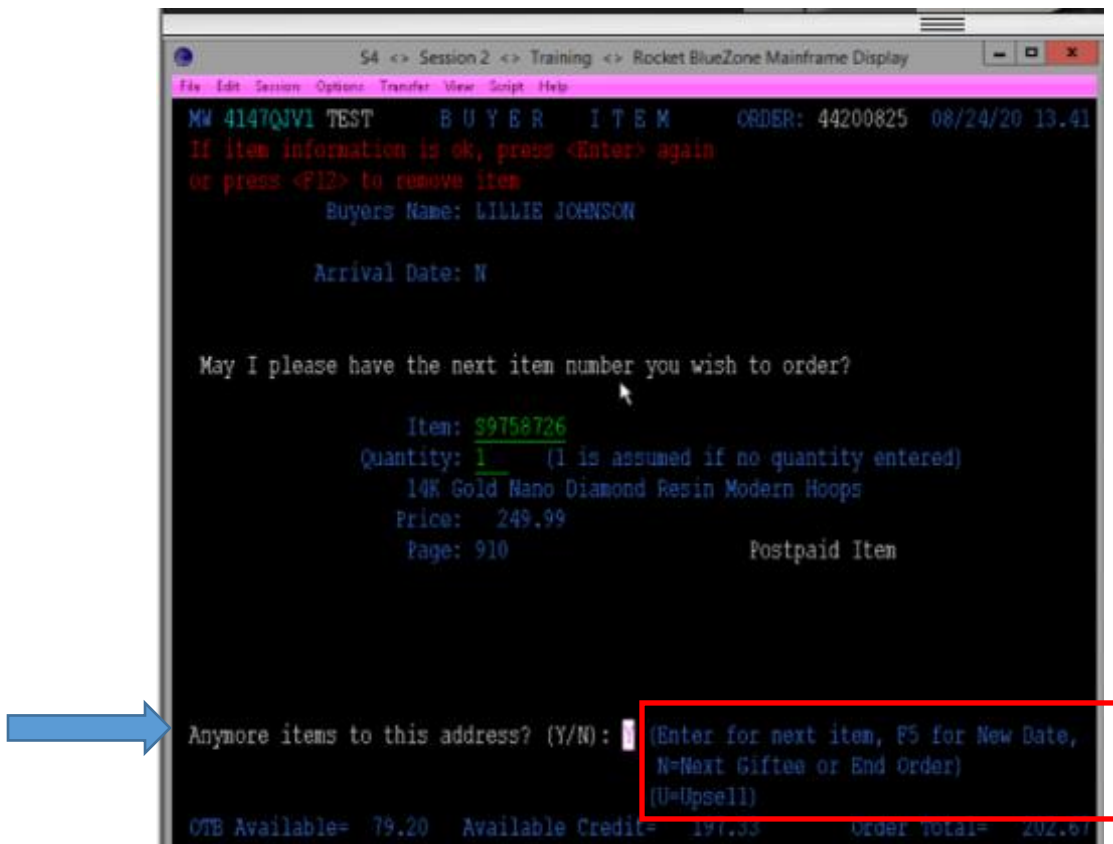
Capitalization matters. The personalization will print exactly as you typed it. Some items may be ordered without personalization

- The system will notify you with a message – **"blanks allowed"**
- **F12** twice if no personalization is requested.

## 3. Press **ENTER**

The item is not added to the order until you press **ENTER**

4. Proceed to ask for the next item.



**ENTER** for next item

**F5** for New Date

**N** for Next Gifted or End Order

**U** to Upsell

5. The Shopping Screen will appear if the item is not available or delayed.

```
TEL 3295-QEZ ITEM SUGGESTIONS 08/01/18 12.10
That is not available, but I have some similar alternate items for you:
ITEM CO DESCRIPTION PRICE PAGE
S9748527 Q Farmhouse Patch Oversized Quilt - Twin 66" 59.99 910
Alternate Choices:
S942714 Q Gwendolyn Leaf Cotton Throw 59.99 910
S9746482 Q TOILE SHOWR CRTN/TAU 49.99 910
S9746482 Q TOILE SHOWR CRTN/BLA 49.99 910
S9746482 Q TOILE SHOWR CRTN/RED 49.99 910
S9721622 Q TOILE PANEL PAIR/TAU 49.99 910
S9753877 Q DMND BEDSKIRT-F/CHA 59.99 910
```

Place the cursor in front of the item and press **ENTER**

When offering items from the Shopping Screen:

- The Shopping Screen may include other items that are available in the size or color of the item that is no longer available or has low inventory.
  - If the size or color choice is no longer available or the inventory is low; the size/color will change colors and will give you the same messages.
- You can only choose 1 item at a time from this list of alternate items.
  - If you try to enter another item; the system will take you to a new help screen with this message: "First item is already retained. This second (or subsequent item) for another catalog cannot be retained in memory."
    - Copy or write this item down on scratch paper.
    - Complete current order.
    - Begin new order with first alternate item saved.
    - Add this new item to the new order & complete.
- You must offer items from this screen BEFORE offering an UPSELL item.

### Items from another company

If the customer chooses an item that is from another catalog, the system will bring up the following information for you to read to the customer.

- "The Alternate Item selected is for a Different Catalog & must be placed on a new order with that company. If you have never ordered from that company and are not ordering with a major credit card, it will require opening an account with that company."
- If the Customer is ok with placing a new order, **ENTER** twice to keep the item.
- If the Customer is not ok with placing a new order, **F12** to exit the help screen and **F12** again to exit the shopping screen.

If the customer chose an item from another company, on the "Thank You" screen you will see a new message: "Now let's enter the order for item \_\_\_\_ from (company)." **F12** to exit the "Thank You Screen" and begin a new order for that company.

- The item number chosen will automatically fill in.

## Double Back Guarantee

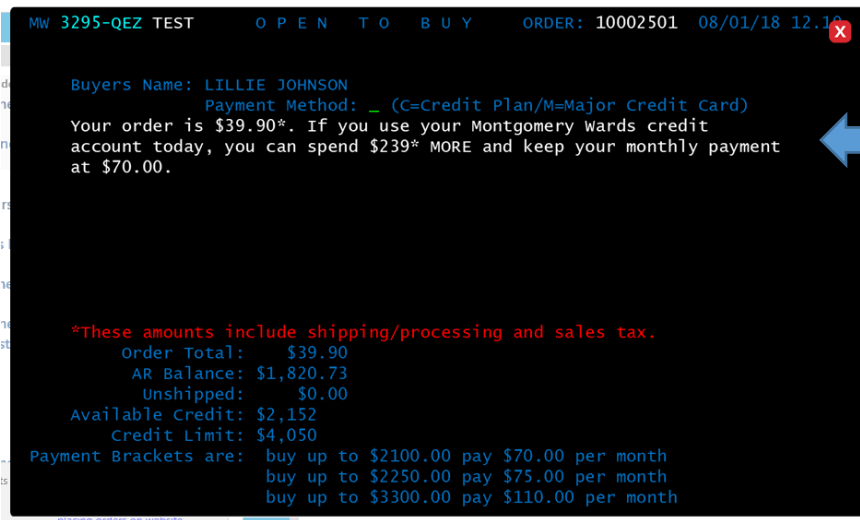
Only tell the customer about the Double Back Guarantee if they ask about it.

If the customer is not completely satisfied with the item(s) they MUST return the unused portion of the item(s) at their cost (we DO NOT send a postpaid return label) and they will receive TWICE the price in any product.

Items with the Double Back Guarantee will have a \$ sign next to the item description. When a customer orders one of these items, you can press **F9** to view the Help Screen where you will see the \$ sign.

Transfer the customer to Customer Service for return procedures.

## 6. Open to Buy Screen



```
Mw 3295-QEZ TEST      O P E N  T O  B U Y      ORDER: 10002501 08/01/18 12.10 X
Buyers Name: LILLIE JOHNSON
Payment Method: _ (C=Credit Plan/M=Major Credit Card)
Your order is $39.90*. If you use your Montgomery Wards credit
account today, you can spend $239* MORE and keep your monthly payment
at $70.00.

*These amounts include shipping/processing and sales tax.
Order Total:    $39.90
AR Balance:    $1,820.73
Unshipped:     $0.00
Available Credit: $2,152
Credit Limit:  $4,050
Payment Brackets are: buy up to $2100.00 pay $70.00 per month
                    buy up to $2250.00 pay $75.00 per month
                    buy up to $3300.00 pay $110.00 per month
```

**Open to Buy (OTB)** is the amount the Customer can spend without increasing their monthly payment.

When the OTB Screen presents:

1. Read the white message to the customer.
2. Ask the Customer what payment method they will be using.
3. Type the payment code into the Credit type field.
  - This information will carry over to the payment screen.
4. Offer items similar to what the customer has already orders.
5. If the Customer would like to add a suggested item, type **Y**
  - This will take you to a blank item screen to add another item
6. If the Customer doesn't want any addition items type **N** and proceed to the Upsell Screen.



```
MW 3295-QEZ TEST      O P E N  T O  B U Y      ORDER: 10002501 08/01/18 12.10
Buyers Name: LILLIE JOHNSON
Payment Method: _ (C=Credit Plan/M=Major Credit Card)
Your order is $39.90*. If you use your Montgomery Wards credit
account today, you can spend $239* MORE and keep your monthly payment
at $70.00.

*These amounts include shipping/processing and sales tax.
Order Total:      $39.90
AR Balance: $1,820.73
Unshipped:      $0.00
Available Credit: $2,152
Credit Limit:   $4,050
Payment Brackets are: buy up to $2100.00 pay $70.00 per month
                    buy up to $2250.00 pay $75.00 per month
                    buy up to $3300.00 pay $110.00 per month
```

### Information on the screen

- **Order total** – The total of this order including shipping/processing and sales tax.
- **AR balance** - Amount on the Customer’s account at this time
- **Unshipped** - The amount of any unshipped merchandise. This amount is also included in the AR balance
- **Available Credit** - Amount the Customer has available to spend before reaching their credit limit.
- **Credit Limit** - The maximum amount of credit the Customer has.
- **Payment brackets** - Shows the maximum Account Balance and monthly payment for the Customer’s current monthly payment, next level and the highest level within that Customer’s credit limit.

The account information is done in Real Time. It will not reflect:

- Unprocessed payments
- Credits to the account from same day
- Orders that require a down payment or that have not processed.

### Offering Open to Buy (OTB)

Offering items while on the Open to Buy screen Attempt to offer similar items, or items that complement the items they have already purchased.

- Example: if the customer purchased a Beef Log, suggest a cheese to go with the Beef Log.
- A good tool for offering similar items is to use the websites “You May Also Like” column.
  - You will need to bring up the website manually as you will not be able to Ctrl+L on the item numbers.

Do **NOT** type an N in the OTB screen until the Customer has said no to the similar items

- If the customer accepts an item after you type N the sale will not count towards your personal OTB successes.

## 7. Upsell Screen – Offer 3 to 5 items from the list

```
TEL      3295-QEZ      UPSELL SUGGESTIONS      08/01/18 12.28
JUST FOR YOU TODAY, WE HAVE SOME GREAT SPECIALS.  THE FIRST ITEM IS

ITEM      DESCRIPTION      REGULAR      SALE
PRICE     PRICE     OFF     PAGE     COM
- IZ600306  20-Piece Kitchen Towel Set
                19.99      17.99   10%    211
- IZ723511  400-Thread Count Checkerboard Sheet Set - King
                66.99      63.79   4%     030
- IZ723512  400-Thread Count Checkerboard Sheet Set - Twin
                66.99      63.79   4%     030
- IZ723513  400-Thread Count Checkerboard Sheet Set - Queen
                66.99      63.79   4%     030
- IZ723514  400-Thread Count Checkerboard Sheet Set - Full
                66.99      63.79   4%     030
- SB728826  Traditions Oversized 6-Piece Towel Set
                24.99      22.99   8%     054
- SB743297  Turkey Fryer, Rotisserie and Steamer by Waring
                249.99     224.79  10%    077   + 1.0%
- SG000776  Select Colossal Mixed Nuts by The Swiss Colony - 1 lb. Net W
                26.95      22.79  15%    078

PRESS <F2> TO GO FORWARD OR <F3> BACK
```

The system automatically takes you to the Upsell screen if the Customer is eligible for UPSELL.

At the top of this screen you will see a message in white. This is an example of a lead-in that you can read to the Customer.

*“Just for you today, we have some great specials. The first item is....”*

You do not have to use the provided lead in. Feel free to create and use your own lead-ins.

- **ENTER** on an item to add it to the order
- **F12** to exit without adding an item.

For assistance be a successful Upseller see; Goto [K-Center](#), search [Upsell!](#)

### Information on the screen

**Item** Column - The Item Number found in the Customer’s Catalog.

**Description** Column - The name of the item.

- **F9** on any item to see the Item Help screen to help describe an item.

**Regular Price** Column- The price listed in the Customer’s catalog.

**Sale Price** Column - The price the item is on sale for.

**Off** Column - The percentage off the item’s original (regular) price.

**Page** Column - The page that the item is found on in the Customer’s catalog.

- Pay attention to the **Item Prefix** the Customer used when ordering. If the Item Prefix doesn’t match the Item Prefix on the UPSELL screen, then the Page Number will not match.

**Com** Column - Commission. Some items offer a higher commission on your paycheck.

Do I still offer Upsell if the Customer said "NO" to Additional Items on the Open to Buy Screen?

- If the Customer does not choose to add an additional item(s) from the OTB screen, it does not mean they will not purchase an item on sale! Use lead ins such as:
- As a thank you for placing your order with us today, I would like to offer you \_\_\_\_\_ to go with your \_\_\_\_\_ at a discounted price of \_\_\_\_\_ today. May I add that to our order?
- You may not have any other regular priced items you want to add today; I would like to tell you about a few items we have on sale.
- If you do not have any other items in mind, we are having a great sale on \_\_\_\_\_ today at the great price of \_\_\_\_\_.

## 8. FREEBIE – goto K-Center – [Freebies](#)

### Rules for Freebies:

- Freebie offers must be requested. We don't ask the customer if they have one. °NOT every catalog goes out with a coupon offering a free item.
- Customers are entitled to one free offer per season (Aug 1st - Aug 1st of the following year.) °The offer is per customer not per order.
  - The system will only allow 1 Freebie.
  - A purchase must be made to receive the free item.
- Some freebies may require a minimum order to receive the freebie. °Customers will see this under the terms and conditions on the coupon or listed on the website.
  - Swiss Colony: \$21.99 minimum order when adding a free gift online
  - Wisconsin Cheesemen: \$50 minimum order when adding a free gift online
- Freebies can be sent to an address other than the customers.
- There is no additional shipping & processing if shipped along with other items to the same address or if it's a Customer Taste Panel (CTP) offer.
  - If the freebie is sent to a Gifted address alone, there is a shipping & processing fee of \$3.99.
- Freebies can be added to online orders.
  - The customer needs to type the item number into the promo code field at checkout.
- The customer can substitute their Freebie offer for another Freebie.
  - Example: Customer needs a Sugar Free Option.
- If the customer insists on a 2nd Freebie, transfer them to Customer Service.

Press **F6** for Blank Item Screen and add the Freebie

#### Customer Taste Panel (CTP).

Some established customers receive a special Swiss Colony item with their first order.

- They receive a coupon in the catalog asking them to join the Customer Taste Panel.
- The customer will receive a survey regarding the product to fill it out and return it to us.
- The number must be included when placing the order.

## Part 7 – Summary Page (F10)

```
MW 3295QEZ1 TEST      S U M M A R Y - 1 of 1 ORDER: 10002501 08/01/18 12.29
The total of the order with Ship/Proc is: 76.94
Briefly summarize, if changes made. Press <F10> for next screen

LILLIE JOHNSON          1125 E SAMSON AVE
                        FRESNO          CA 93706

ARRIVE: Now            EAD: 08/13/18
1-42714 $59.99 Gwendolyn Leaf Cotton Throw
Gold
```

“Current Order Total” is at the top of the screen.

- This amount also includes *Shipping* and *Processing* charges, if applicable.
- This total is for your reference, only.
  - Do not tell the Customer the total from the order summary, unless they ask you.

1. This summarizes the order you just placed for the Customer.

- Since you verified everything as you entered it, you do not need to summarize the order, unless a change is made after reaching this screen.
- To proceed, **F10**.
- If more than one page, prompt on top of page will state, **Enter here** for next page.

If changes are made after you have seen the Summary screen, you must then verify the order from the order summary screen.

To Verify, briefly summarize the order

- Verify Item Quantity and Item Name
  - Verify Color and Size, if any.
- Verify the name and city where the items are shipping
- Verify Estimated Arrival Date

**Example:** *Going to your address for now delivery, I have the Gwendolyn Leaf Cotton Throw in Gold and 2 of the Cooling Pillowcases in Fawn. Going to Chris's address in Chicago for Christmas I have the Multi Pocket Upright Duffel in Blue....*

## 2. Making changes on the Summary Page

**Removing Items / Giftee:** Type **R** in front of the item / giftee you want to remove and **ENTER** twice.

- **Note:** You can only remove 1 item at a time.

### **Adding Items:**

Type **A** in front of an item and **ENTER**. The system will take you to a blank item screen.

### **To Change Quantity:**

Place cursor on the line in front of the item for which you want to change the quantity. Type the **new quantity** and **ENTER**.

### **To Add a New Date Screen:**

Type **A** in front of the EAD and **ENTER**. The system will take you to a new date/greeting screen.

### **To Add a Giftee:**

Type **A** in front of the name of the last person sent to and **ENTER**. The system will take you to a new giftee screen.

## Part 8 – Payment Screen

When placing an order by phone our Customers can pay for the order using Credit Plans, Major Credit Card or Gift Certificates.

### 1. Credit Plan

```
MW 3295QE21 TEST      P A Y M E N T      ORDER: 10002501 08/01/18 12.29

Buyers Name: LILLIE JOHNSON
Would you like this billed with our credit plan or to a major credit card?
Payment Method: C (C=Credit Plan, M=Major Credit Card)

If major credit card, enter the following information
Major Credit Card Number: _____
Expiration Date: ___ / ___ (MM/YY) CID: _____

The following numbers should be keyed only when buyer indicates
Gift Certificate Number: _____ #2: _____ P.O. Number: _____
Plan O Available Credit= 317.06
```

#### 1.1 Enter the customer's SSS# and Date of Birth

```
SC 4114QHA1 TEST      P A Y M E N T      ORDER: 43347478 08/24/20 10.48

Buyers Name: MAGGIE AGGIE
Would you like to open a credit account or use a major credit card today?
Payment Method: M (C=Credit Plan, M=Major Credit Card)

For security purposes and to verify your identity,
May I get your social security #? ___ / ___ / ___ (MM/DD/YYYY)
May I get your date of birth? ___ / ___ / ___ (MM/DD/YYYY)

What is your monthly income? N=None, U=Up to $1000, B=Between $1000-5000,
O=Over $5000, M=Major Credit Card, R=Refused

If major credit card, enter the following information
Major Credit Card Number: _____
Expiration Date: ___ / ___ (MM/YY) CID: _____

The following numbers should be keyed only when buyer indicates
Gift Certificate Number: _____ #2: _____ P.O. Number: _____
Plan O
```

What do we do if the customer refuses to give us their Social Security Number (SSN/SS#)?

1. Ask the Customer to provide their Date of Birth (DOB).
  - The system will allow you to continue without the Social Security Number (SSN), as long as the Date of Birth is entered.
2. If the Customer refuses to give their Date of Birth (DOB):
  - Explain: We need this information for your protection. Without it, I am unable to place your order on our credit plan today. Would you like to provide this information or select another form of payment?
  - If the Customer still refuses, place the order using a Major Credit Card. Without this information, the order is unable to be placed on our credit plan.

If customer does not want to pay using a Major Credit Card. Cancel the order in **TEL**

Can the Customer pay for the order using a Check/Money Order?

Only if placing the order through the **mail**.

We can only accept a check or money order on mailed in orders. We do not have a way to place an order over the phone using a check or money order.

My Gift Certificate covers the full amount of the order, why do I still need to choose a payment method?

Our system requires a payment method be entered even if the gift certificate covers the full amount of the order. We are unable to process the order without this information.

Can the customer put for 1/2 on a Major Credit Card and 1/2 on our Credit Plan?

**THIS CANNOT BE DONE.**

- If a customer uses a **major credit card** when ordering, **ALL** of the order will be charged to the card at time of shipment.

What is a Purchase Order Number?

The purchase order field (P.O. Number) on the Payment Screen is to be used only when the customer tells you they need to have their purchase order number appear on the invoice/bill we send to them.

**DO NOT** ask the customer about this; the customer will tell you if they need this information added.

## 2. Major Credit Card

```
MW 3295QEZ1 TEST P A Y M E N T ORDER: 10002501 08/01/18 12.31
Card number required

Buyers Name: LILLIE JOHNSON
Would you like this billed with our credit plan or to a major credit card?
Payment Method: M (C=Credit Plan, M=Major Credit Card)

If major credit card, enter the following information
Major Credit Card Number: [REDACTED]
Expiration Date: __ / __ (MM/YY) CID: __
The following numbers should be keyed only when buyer indicates
Gift Certificate Number: _____ #2: _____ P.O. Number: _____
Plan O Available Credit= 317.06
```

- 2.1 Enter the CREDIT CARD number
- 2.2 Enter the Expiration Date
- 2.3 Enter the CID

F9 for HELP



```
TEL 0259-QHG CUSTOMER SERVICE HELP DISPLAY 08/24/20 14.28
GOTO: CARD ID TYPE: CS (CS=CUST SERV, AC=ACTION CD, IT=ITEMS)
TO TELL CUSTOMERS WHERE TO FIND THEIR CARD IDENTIFICATION NUMBER:
VISA - MASTER CARD - DISCOVER -
IT'S A 3-DIGIT NUMBER ON THE BACK OF THE CARD ON THE SIGNATURE PANEL.
IT MAY FOLLOW ALL OR PART OF THEIR CREDIT CARD NUMBER.
AMERICAN EXPRESS -
IT'S A 4-DIGIT NUMBER ON THE FRONT OF THE CARD ABOVE AND TO THE RIGHT OF THE
ACCOUNT NUMBER
AMERICAN EXPRESS OPTIMA -
IT'S A 4-DIGIT NUMBER ON THE FRONT OF THE CARD ABOVE AND TO THE LEFT OF THE
ACCOUNT NUMBER.
**IF THE CUSTOMER DOES NOT WANT TO GIVE THE CARD ID#, YOU MAY LEAVE THE FIELD
BLANK AND CONTINUE THE ORDER WITHOUT IT.**
```



## Part 9 – Total Screen

```
MW 3295QEZ1 TEST      T O T A L S      ORDER: 10002501    08/01/18 12.32

BUYERS NAME: LILLIE JOHNSON

The total of the order with Ship/Proc is:   76.94   ITEM TOTAL:   59.99
  O Open Credit - 30 Days                    TOTAL SHIPPING/PROCESSING: 16.95
                                           ADDL SHIPPING/PROCESSING:  0.00
                                           SALES TAX:                 0.00

(To make a change, press <F10> to go to Summary)
Enter 'E' to end order and get additional messages: _

PROMOTION CODE: _____
CATALOG REQUEST CODES: _____
OFFICE USE CODES: _____

To add comments: _____
                    _____
                    _____
```

Breakdown

1. Start by reading the White Script:

*"The total of the order with Shipping & Processing is: \_\_\_\_\_"*

Only give the Customer the Total with Shipping & Processing.

If the Customer asks for a breakdown of the total, it is found on the right of the screen

1. Item Total: Total of the items on the order.
2. Total Shipping & Processing: Standard Shipping based on the Item Total
3. Additional Shipping/Processing: Any Expedited or Size/Weight Charges
4. Sales Tax: Amount of Sales Tax if applicable.

For more information, Goto K-Center, search [Orders - Charges](#)

### PROMOTION CODE

Enter the Customer's promotion code exactly as they give it. Promotion Codes are normally a combination of letters and numbers.

- If the Customer's code consists of all number, this may be a Gift Certificate which is entered on the Payment Screen.

## OFFICE USE CODE

Office Use Codes are used to make notes on the order.

**F9** on the Office Use Code line for the list of codes and a definition of them.

"D"	DON'T SEND CATALOG TO GIFTEE (OR TO BUYER'S "SHIP TO" ADDRESS)
"J"	REQUESTING SPANISH FOR NEXT CALL
"K"	DO NOT SEND ORDER ACKNOWLEDGEMENT
"M"	MESSAGE FOR ORDER CORRECTIONS-See below
"O"	SEND EXTRA ORDER BLANK
"R"	DO NOT RENT CUSTOMER'S NAME TO OTHER COMPANIES
"S"	DON'T SUBSTITUTE ON THIS ORDER
"1"	VERIFIED QUANTITIES (OF 10 OR MORE)
"2"	VERIFIED PERSONALIZATION (IF IT IS LONG OR UNUSUAL SPELLING)
"3"	DEDUCT \$10 DISCOUNT CERTIFICATE

Note: You may enter up to 10 office use codes.

- Continuously type one after another (no spaces) only the 1st code description will show after you **ENTER**.

## M CODE

An **M** Code is a message for Order Corrections. It is used when an item is not showing on the order correctly (i.e. Price is incorrect, Item not showing color/size options, problem pack discount) or to add additional Gift Certificate #s.

To enter an **M Code**:

3. Type an **M** in the Office Use Code Field
4. In the To add comments: field, enter instructions for Order Corrections.
  - Instructions must include the Item # and the correction
    - **Examples:**
      - *654321 discount \$10 per help screen*
      - *654321 match internet price of \$19.99*
      - *654321 customer wants blue*
      - *654321 add item in size 6 Blue*
      - *GC #3 123456478 GC #4 1234432112*

2. Type **E** Press **ENTER**

## Part 10 – Thank You Screen

```
MW 3295QEZ1 TEST      T H A N K   Y O U  1 of 1 ORDER: 10002501  08/01/18 12.33
<F12> to exit if no changes needed.
BUYERS NAME: LILLIE JOHNSON
Your order number is 10002501.          EAD: 08/13/18      Total: 76.94

Thank you for ordering with Montgomery Ward.  You may check your order
at any time by going to our website at Wards.com

To begin an order for a different company, enter it's code:  <F9> for list
* If there is nothing else, thank the Customer for calling.
```

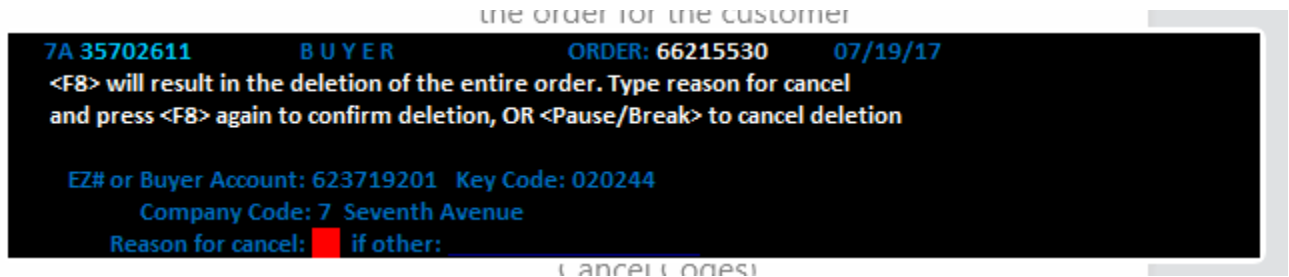
This is the last page of the order.

- Everything shown in **Turquoise** must be read **VERBATIM**.
- After reading the Turquoise message, always ask the Customer if there is anything else you can help them with.
  - If there is nothing else, thank the Customer for calling.
- Disconnect the call.
  - You do NOT need to wait for the Customer to hang up before disconnecting.
- **F12** to exit Thank You screen and return to the Main Menu.

## Part 11 – Cancelling/Deleting an Order

### 1. Canceling an Order

- 1.1 **F1** to the Buyer Information Page
- 1.2 **F8** to bring up the Reason for Cancel Script
- 1.3 Type the Reason for cancel code in the required field. (**F9** to see the list of Cancel Codes)
- 1.4 If using **OT** – Other Cancel Code you must type additional information in the provided field (ex. OT Not Placing Order; Not Customer's acct)
- 1.5 If more than one code applies, select one of the codes to use.
- 1.6 **F8** to delete the order.



### 2. Cancel Reason

- 2.1 Priced Too High
- 2.2 Changed Mind
- 2.3 Shipping and Processing
- 2.4 Item Delayed or NLA

If the customer wants to cancel their order due to an item being priced too high, the item being delayed or NLA, or the Shipping and Processing being too high, complete the following steps:

- Offer an alternative item  
*Try to locate a similar product on the website that will fit the customer's needs*
- Explain the reason for the pricing and attempt to save the sale.  
*i.e. Shipping and Processing is comparable to other catalog companies.*
- Offer a 10% discount  
*For assistance applying a 10% discount, goto K-Center [Discount Promotion Code / Coupons](#)*
- If unable to save the sale, proceed to cancel the order for the customer

## 2.4 Down Payment

If the Customer want to cancel the order due to a down payment request, **DO NOT** cancel the order.

- **TAB** to the option that reads *Does not want to make down payment.*
- **need screenshot -**
- **ENTER** for message.
- Read the new Turquoise message

```
"When you're ready, you can make your payment online at any time. You'll receive a letter in the next 5-7 days that further explains the need for a down payment and how to make it."
```

- Explain to the customer the order will not be processed unless a down payment is made.
- Do not cancel the order, because if the customer calls back and decides to make their down payment, they will be unable to make it because the order is cancelled.

## 2.5 Refuses to give SSN or Date of Birth

If the customer refuses to provide the following information or wishes to cancel the order instead of providing the information, complete the following steps.

Social Security Number and/or Date of Birth - **These are required fields.**

- If the customer refuses to give this information:
  - Enter to view the rebuttal message
    - This message presents in Turquoise and needs to be read verbatim.

If the customer still doesn't want to provide this information you may proceed one of two ways:

1. Place using a Major Credit Card
  - Change payment Method to M
  - Enter the Credit Card #, Expiration Date and CID as normal
2. Cancel the Order
  - After the rebuttal message
    1. **F1** to the Buyer Information Screen
    2. **F8** to bring up the cancel reason script
    3. Type **SS** if No Social Security # Given or **DB** if No Date of Birth Given.
    4. **F8** to complete the cancel script.

```
SC 07502611          P A Y M E N T          ORDER: 67897188  09/12/17

Buyers Name: MEGARA EGAN
Would you like to open a credit account or use a major credit card today?
Payment Method: C  (C=Credit Plan, M=Major Credit Card)

For security purposes and to verify your identity,
May I get your social security #?
May I get your date of birth?  _/ _/ _ (MM/DD/YYYY)
We need this information for your protection. Without it, I am unable to
place
your order on our credit plan today. Would you like to provide this
information or select another form of payment? (F9 for Help)
```

## 2.6 CORDER

**If the customer calls back to inquire further about the order, and then tells us to cancel the order:**

1. Go to CORDER
2. On Order Totals Screen: Type C
3. ENTER
4. On Thank You Screen: TAB to the Reason for Cancelling
5. ENTER – your selection will turn white and message at the top of the screen will read “Cancel Confirmed - F12 to exit”
6. F12 to exit the order and complete the cancelation request.

## 2.7 Screen Auto-Pop (TEL- Not placing an Order)

**Customer is Not Placing Order (Screen Auto pop)**

**If the screen auto pops into TEL and the customer is not placing an order.**

1. F8 to bring up the Reason for Cancel Script a.The Reason for Cancel will auto fill with the NO code
2. F8 again to return to the Main Menu

## 2.8 Email Cancellation Request

**If the customer emails and then tells us to cancel the order:**

1. Go to CORDER
2. Change source to Email
3. On Order Totals Screen: Type C
4. ENTER
5. On Thank You Screen: TAB to the reason for cancelling °If no reason is given, TAB to Other  
i.On the Comment Line type: Email Request No Reason
6. ENTER to confirm your selection °The selection will turn white and message at the top of the screen will read “Cancel Confirmed - F12 to exit”
7. F12 to exit the order and complete the cancelation request.
8. Respond to the Customer using the (cncl) Cancel Standard Response.

## Part 12 – CORDER

What is **CORDER**?

CORDER allows you to make changes to any order placed today, orders in order corrections, order adjustments or credit Held orders....any order that is not FOE.

Not all rep levels will have access to all order statuses. A message will appear on the CORDER screen instructing you to transfer to Customer Service if you do not have access to a particular order. Don't forget to enter notes in the GUI if you need to transfer a call.

### General Rules to Follow:

1. Clear ALL yellow messages from the order by getting the necessary information from the Customer.

There is only 1 situation where you would not have to work all the yellow error messages. If the Customer wishes to cancel the entire order, it is not necessary to spend time working each message, you may cancel the order without clearing off the error messages.

2. Work “**yellow**” messages from the top of the order summary screen down.

3. Items listed below the “**PINK**” line on the Order Summary screen will not ship.

(Hint: these items do not show a price (\$0.00). **ARROW down** and to the error message on each item, press **ENTER**, and add the requested information needed to clear the error message. Once the error message is cleared the item will now show up above the “**PINK**” line and will reflect the price of the item, *except for items with the Item **Sold Out** message which will remain below the “**PINK**” line.*

4. You may type an “**A**” or “**R**” on a line to add or remove on the order.

Exception: You are not able to “**R**” and remove items with Item Sold Out messages. These items will remain on the order in the un-shippable section.

5. Shortcut: To duplicate an item and ship to another address press **ENTER** on the item twice. The system will remember the item number. Then type an “**A**” in front of the Customer's address and press **ENTER**. Add the new name, address and ship date information and then type an “**\***” (asterisk) on the item line.

6. To Cancel an entire order, type “**C**” on the where you would normally end the order.

7. To Un-Cancel an order previously entered and cancelled earlier **Order Total screen** today, type a “**Y**” in the Un-Cancel field. You can only use the Un-Cancel feature on orders placed earlier today.

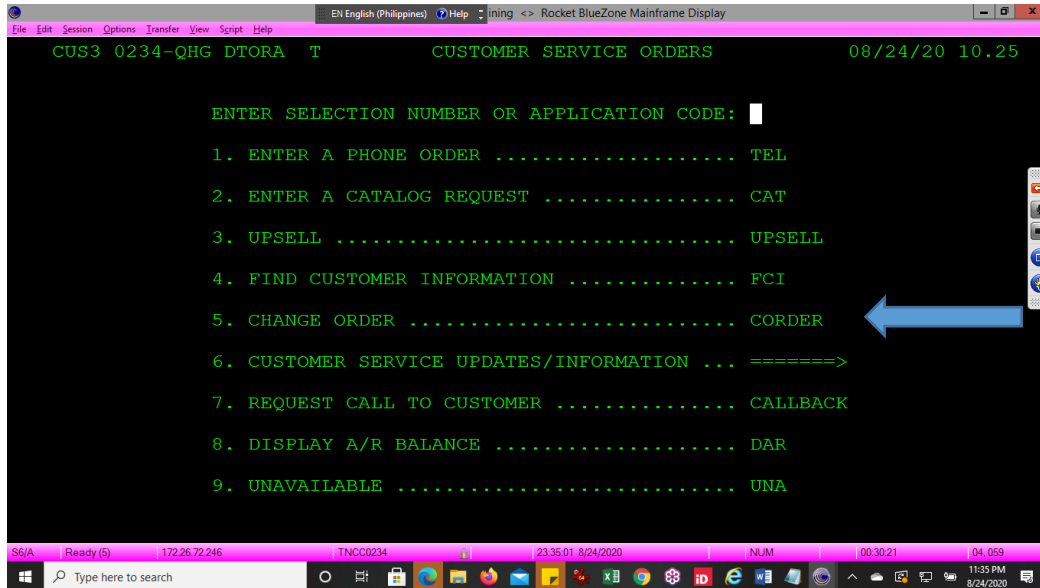
8. CSR comments are automatically applied and unless there are unusual circumstances you will not need to add additional comments in CSR.

9. If you accidentally clear a message without working it, press **F1** back to the Buyer Information screen and **F8** twice. This will reset all the error messages on the order. You will have to rework any messages you had already cleared.

10. On Held for down payment orders you may add or remove any items as the Customer requests. There is NO dollar limit on what can be added to an order. As adding or removing items may change the amount of down payment requested, always make any changes before processing a down payment for the Customer. After making changes to an order, the down payment amount may change. If so, you **MUST** read the new down payment information and amounts to the Customer.

Q: If there are no items for a Giftee (only an address) and the Customer doesn't want anything sent to the Giftee, do we "R" to remove the giftee name and address totally or just leave the name and address on the order?

A: You may "R" to remove any giftee on the summary screen after verifying the Customer does not want any items sent to that person.



## 1. Change Payment Method/Add Gift Certificate

### 1.1 If adding a Gift Certificate:

- 1.1.1 In CORDER, F10 from Order Summary to Total screen.
- 1.1.2 F3 from Total to Payment Screen.
- 1.1.3 TAB to the Gift Certificate Field.
- 1.1.4 Type the Customer's Gift Certificate Number.
- 1.1.5 Verify any information you typed.

1.2 At this time, we are not able to change the payment method on an order using CORDER, because they order will not re-process under the new payment method.

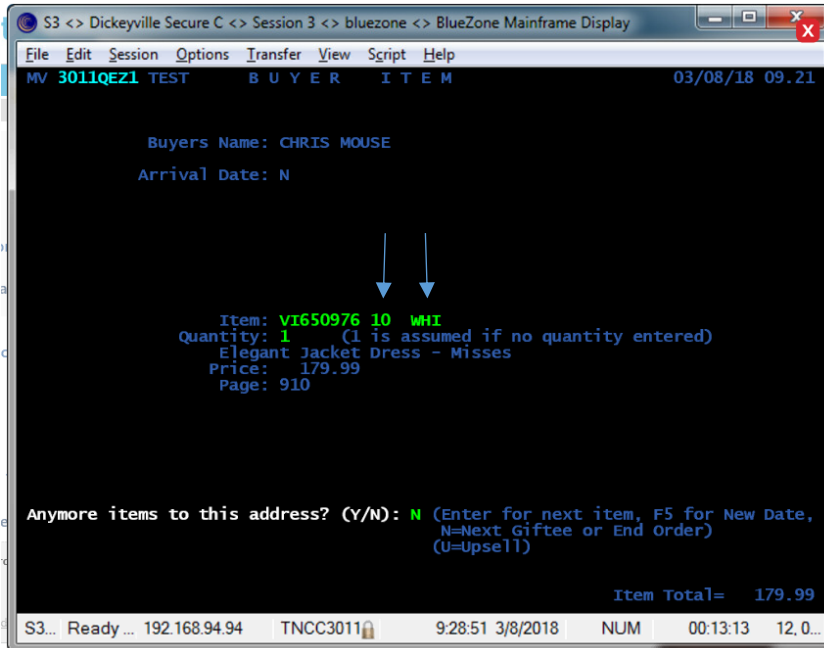
- If the order is held for a down payment and the Customer wants to change the payment method to a credit card, you can treat it as a down payment and pay for the order in full.
- If the order was placed on a credit card and the card declined, see Credit Cards & Checks.



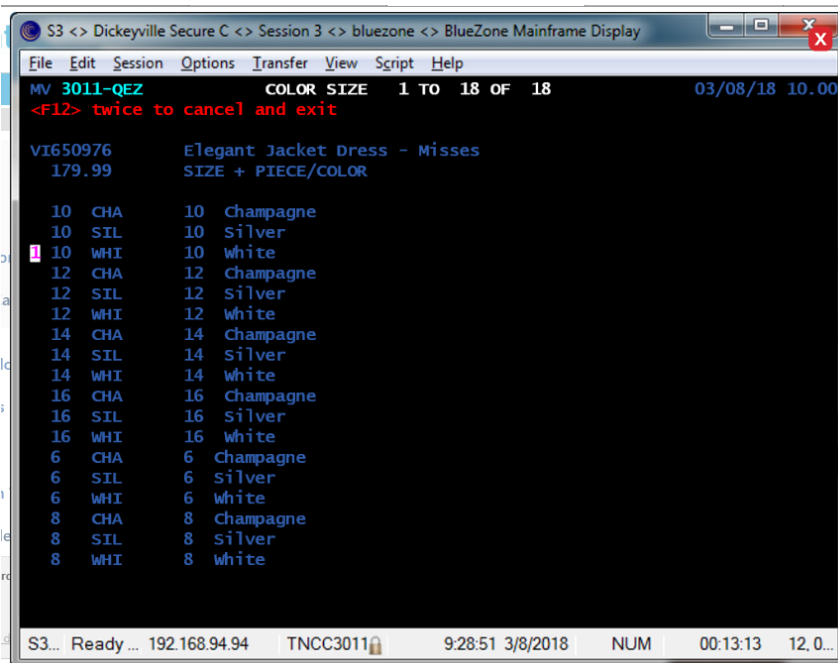
## 2. Changing the Color/Size of an item

2.1 Goto to the Item Page of the item the Customer wants to change.

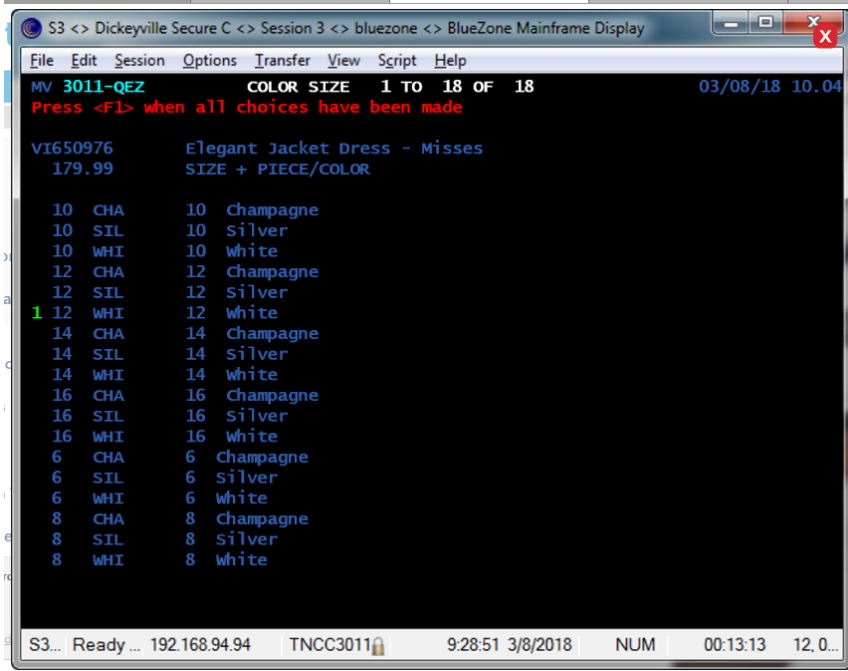
2.2 **ARROW** to the Size/Color field and press **ENTER**



2.3 TAB to the size/color that was ordered and SPACEBAR through the quantity



## 2.4 TAB to the new size/color ad type quantity



```
S3 <> Dickeyville Secure C <> Session 3 <> bluezone <> BlueZone Mainframe Display
File Edit Session Options Transfer View Script Help
MV 3011-QEZ          COLOR SIZE 1 TO 18 OF 18          03/08/18 10.04
Press <F1> when all choices have been made

VI650976          Elegant Jacket Dress - Misses
179.99           SIZE + PIECE/COLOR

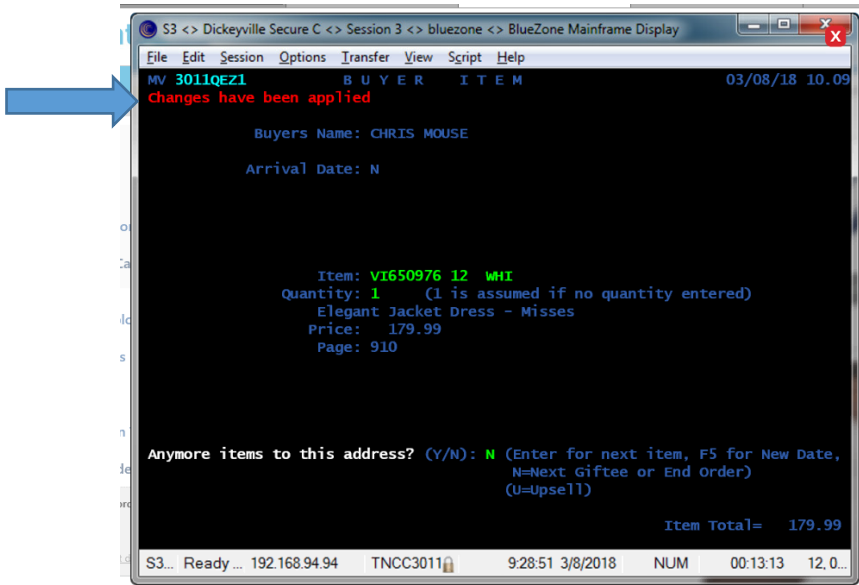
10 CHA 10 Champagne
10 SIL 10 Silver
10 WHI 10 White
12 CHA 12 Champagne
12 SIL 12 Silver
1 12 WHI 12 White
14 CHA 14 Champagne
14 SIL 14 Silver
14 WHI 14 White
16 CHA 16 Champagne
16 SIL 16 Silver
16 WHI 16 White
6 CHA 6 Champagne
6 SIL 6 Silver
6 WHI 6 White
8 CHA 8 Champagne
8 SIL 8 Silver
8 WHI 8 White

S3... Ready... 192.168.94.94  TNCC3011  9:28:51 3/8/2018  NUM  00:13:13 12.0...
```

## 2.5 ENTER to update

## 2.6 Press F1 to apply

2.7 You will see a message in red stating "Changes have been applied".



```
S3 <> Dickeyville Secure C <> Session 3 <> bluezone <> BlueZone Mainframe Display
File Edit Session Options Transfer View Script Help
MV 3011QEZ1        BUYER ITEM          03/08/18 10.09
Changes have been applied

Buyers Name: CHRIS MOUSE

Arrival Date: N

Item: VI650976 12 WHI
Quantity: 1      (1 is assumed if no quantity entered)
Elegant Jacket Dress - Misses
Price: 179.99
Page: 910

Anymore items to this address? (Y/N): N (Enter for next item, F5 for New Date,
N=Next Giftie or End Order)
(U=Upsell)

Item Total= 179.99

S3... Ready... 192.168.94.94  TNCC3011  9:28:51 3/8/2018  NUM  00:13:13 12.0...
```

## 2.9 Continue with the order

### 3. Changing/Adding a Giftee

**Before** using **CORDER** to make a change to a Customer's order always check the following:

#### 5. Is the order FOE?

- If yes, it cannot be changed. Cancel the original order and place a new one.
- If no, what is the Customer requesting?

#### 6. What is the Customer requesting?

- To prevent fraudulent orders. If the Customer is requesting to:
  - Changing the **Ship To** address from the Billing Address to a Giftee Address.
    - **Cancel the original order and place a new one.**
  - Changing the **Ship To** address to an address in either **Miami, FL** or **Doral, FL**.
    - **Cancel the original order and place a new one.**

If an order is not yet **FOE** (free of error) and you need to add a Giftee or an item can't go to a PO Box and you need to add a Giftee to ship to a physical address go to **CORDER**.

1. Place an **"A"** in front of the Customer's name to add another Giftee.
2. Type in the new name and address.

To add a physical address when the "Cannot ship to PO Box - needs physical shipping address" error message appears:

- TAB to the "Cannot ship to PO Box - needs physical shipping address" error message.

### 4. Changing a Greeting

If order was placed today and the Customer is calling back to change the greeting, you can go to **CORDER** to make the change in the greeting.

Remember: order must have been placed today in order to change in **CORDER**.

- To change a greeting on an order placed before today or that you can't change in **CORDER**, transfer to Customer Service.
- Customer Service Agents (CSR4/5) can check out **GREET** for more information on handling these transfers.

### 5. Cancelling an Order

If the Customer calls back to inquire further about the order, and then tells us to cancel the order, *see Cancelling an Order* in **TEL** to assist the Customer.

### 6. For other information *see CORDER Messages*

