

Sales Cheat Sheet

;CUST- Updating Customer Account

- 1) Type in ;CUST at the home screen
- 2) Search for the customer (last name and zip code only)
- 3) Update the necessary information by selecting the corresponding line number
- 4) Type "F" and <enter> to file/save information, then ESC to get back to your home screen.

;AV- Item Availability

- 1) You can type this **hotkey** anywhere in Condor. Type ;AV and hit ENTER
- 2) In ;AV type the 5 digit item number and it will pull up the item (This screen will show item availability info)
- 3) Select Item from the list
- 4) Go to Item Specifications and Sizing to look at details about the item by selecting 1
 - a) Type in **S** at the command line it will take to you to the specific measurements for the item in all sizes offered.
 - b) Go to Available Catalogues and Pricing to check the page number of this item in that catalogue.

;CAT- Requesting and Removing a name from the Catalog list

- 1) Type in ;CAT at the home screen
- 2) Search for the customer using their last name and zip code (only); if the cust is there, select the line number
 - a. Type M on the command line and change mailing preferences
- 3) If cust is not on the list, press ESC once and type N for new
- 4) Enter the customer's name, and address. Always repeat and verify any information you build into the system.
- 5) Asking the customer for a day/evening phone number is not necessary for requesting a catalog.
- 6) For line 17 type in the letter "P" for phone because the customer is calling in to make the request over the phone.
- 7) For line 19 type in the letter "N" for No, since this is not a retail customer. (After you enter past line 19 the "N" will disappear and that is ok)
- 8) Type "M" for Mail preference
 - a. Y for requesting a catalog
 - b. N for removing a catalog
- 9) If this is the customer's second request to be removed from the catalog mailing list please do not go through the steps again to remove the customer.
- 10) Choose #2 for the Soft Surroundings Catalog (All others do not apply).
- 11) Choose the correct line number of the reason code as to why the customer wants to request a catalog or be remove from the catalog
- 12) There is no Contact Source Code, Enter pass to get to your command
- 13) Type "F" for File at your command line

14) Once you have completed the customer's request type "F" for Finish at the command line.

- Escape to get back to your home screen
 - It takes 7-10 business days to receive a catalog
 - It takes 2-3 catalogs to be removed from our mailing list because they are pre-printed

Placing an order and shipping to the same address using the customer number

- 1) Ask for the customer for the Customer Number on the back of the catalog in the blue shaded area and enter the number at the customer number field.
- 2) At the command line press "N" for new and Enter.
- 3) Verify the Name on the Credit Card they will be using today and the Credit Card Billing Address.
- 4) If any changes need to be made to the Billing Information, type in B at the command line.
- 5) You will be able to make any changes necessary to the customer's Billing Information from this screen by typing in the corresponding line number.
- 6) Verify the shipping address
- 7) Verify or obtain (if one is not available) a daytime & evening/alternate telephone number. Repeat anything you build into the system.
- 8) "F" for Finish when you are ready to move on.
- 9) Ask for the Key Number on the back of the catalog in the gray shaded area
- 10) Enter the customer's items
- 11) If the item comes in multiple colors, ask the customer for their color and type in the number on the far left associated with the color.
- 12) Ask the customer for their size.
- 13) Verify the item, color, size, and the expected ship date which is located at the bottom right of the screen.
 - If the item says it's "in stock" let the customer know the item is in stock and give the **expected** ship date.
 - If the item does not show "in stock", let the customer know we have received this item for them and give the expected ship date.
- 14) You **MUST** offer one Traditional upsell on every applicable call
 - You can choose any item to upsell to the customer
- 15) You **MUST** offer the Select upsells on every applicable call (if it appears)
 - The customer can choose any item they would like for 15% off
 - Read the top of the Select Upsell prompt verbatim
 - If the customer chooses to take the offer, select "1" and enter-this will take you back an available line number to enter in the item number.
 - If the customer declines the order you can type "F" for Finish or "2"
- 16) At the payment screen type in "?" to see the credit card options
- 17) Expectable credit cards types: Visa, MasterCard, American Express (need to get 4-digit CID on the front), and Discover (need to get 3-digit CID code on the back). Customer can only use **one** credit card per order.
- 18) Customers can also use Soft Surroundings issued Merchandise Credits, Discount Coupons (**one per order**), and Soft Surroundings issued Gift Cards.
- 19) We do not accept checks/cashier's checks/cash payment over the phone. We only accept this by mail.

- 20) Enter in the credit card number and verify it. Then enter in the expiration date and verify it. Hit enter once you've completed the verification.
- 21) Key phrase on the email address: "We would like to send you a confirmation of your order and notices of upcoming sales and promotions. What email address may we send those to?"
- 22) If the customer has an email address, enter it in and verify the spelling. If the customer does not have an email address hit enter. (**Do Not Put In a Fictitious Email Address**)
- 23) "Would you like to share the month of your birthday to receive a special discount?" - We like to send a customer a Happy Birthday card with a \$20 discount coupon.
- 24) Type F to file

Placing an order for an Unavailable Item

- 1)** Follow the same steps as above
- 2)** After entering in the customer's item number verify the item
- 3)** Notice it doesn't say "in stock" under the expected ship date of the item. When you see this use the key phrase, "I have reserved this item for you and it is expected to ship on (date)"
 - Never use the word **backorder**, always say reserved or not in stock.
 - Then proceed with the order as normal...
- 4)** The customer may ask if there are any other colors or sizes available. You can type in ;AV and enter the item number.
 - If an item is not in stock there will be a negative number under **Currently Available**.
 - There may be a **Future Quantity Date** for the item in a specific color and size.

CT + line #- Changing the Price of the Item

- 1)** This is used to change the price of the item
- 2)** You will do this if the customer says the price that we have is different from the price they have seen.
- 3)** The customer must tell you the dollar amount they saw the item for.
- 4)** Hit the Up arrow to move to the line before
 - That will bring you back to the command line of the previous item
 - If this is not the item that you want, you can hit ENTER and it will scroll you through the items
- 5)** When you are on the command line type CT+line#
- 6)** A list will appear that will have all of the prices that were previously offered.
- 7)** Select the line that is showing the customer's price
 - If it is not on the list it is likely that we never offered the item at that price or it was a special price at the time the customer saw it.

Placing an Order with a Different Shipping Address

- 1) Ask for the Customer Number on the back of the catalog in the Blue Shaded area
- 2) Have the customer verify the Name on the Credit Card and the Credit Card Billing Address.
- 3) Verify or obtain a daytime telephone number
- 4) Ask the customer if we are shipping to the address listed. If the answer is no: type <SEL> to add a new shipping address or select a shipping address already in the system.

- 5) Once you type in <SEL> , the system will take you to the customer's address book.
 - If we already have the customer's alternate shipping address, verify the address and select the line number associated with the address.
 - If we do not have the customer's alternate address listed type in "A" for Add and add the new shipping address the customer would like to ship to. Once you've added the new address type "F" for File to proceed with the order.
- 6) Ask for the Key Number on the back of the catalog in the Grey Shaded area
- 7) Enter the customer's items (at the very top you will notice the billing address and the shipping address are different)
- 8) Follow the ordering process as normal

Shipping to Multiple Addresses

- 1) The key is to handle one order/address at a time
- 2) First get all of the items that are going to the first address
- 3) Go to the payment screen
- 4) Hit escape 3 times to get to your Order Screen
- 5) At the order entry screen type "N" for New Detail
- 6) You are then able to select someone from the list of ship to addresses they have or build a new one by typing "A" for Add. You can also "M" for Modify if there is something incorrect on an existing address in the system.
- 7) Enter the customer's new shipping information
- 8) Type in "?" Ask the customer if the address that was given is residential, commercial, or postal and select the number associated.
- 9) Under UPS AV Code type in "?"
- 10) Always choose number 7-New Ship To Created
- 11) Do not be alarmed it says number 6. As long as it says New Ship to Created everything is fine.
- 12) Type "F" for File
- 13) Proceed asking the customer for the item(s) they would like to send to this address.
- 14) After you have received all items "F" for File to get to your payment screen. Escape 3 times to get back to your Order Screen.
- 15) At the Order Screen notice at the bottom it says "Detail 2 of 2" . This confirms you have created 2 orders in 1
 - If the customer needs to ship to more than 2 addresses, just repeat the process.
- 16) At the command line type "D+line#" to go back and forth between both addresses.
- 17) Once you have completed the order type "F" for File. A popup box will appear confirming there are 2 details under 1 order number.
 - Note: Each New Detail has it's own processing and shipping

Monogramming

- 1) Not all items can be monogrammed
 - The system prompts you as to which ones can be monogrammed
- 2) Ask the customer if she would like to have the monogrammed.
- 3) If the customer wants the item monogrammed type "Y" for Yes. If the customer does not want monogramming type "N" for No

- 4) A few colors and styles are listed in the catalog. However there are more colors and styles listed online. Depending on what style the customer chooses will depend on the placement of the lettering for the monogramming. Please refer to the chart online to find the correct placement of lettering.
- 5) After choosing the style and color the customer would like the system will ask for the letters. The letters should read as they will appear on the item.
- 6) After completing the monogramming lettering type F for file
- 7) The system will ask you if the monogramming/personalization is correct. If it is type Y for yes
- 8) Complete the rest of the customer's order
- 9) If you accidentally pass the monogramming offer or the customer wants to take advantage of the monogramming offer, got to the command line of the item and type in hidden key MONO.
- 10) Items on the outlet **cannot** be monogrammed.

Giftwrapping

- 1) From a blank line item
- 2) Press the up arrow
- 3) At the command line type "G + the line" number of the item you want wrapped.
- 4) The system will ask you to confirm you would like this item gift wrapped. "Y" for Yes and "N" for No
- 5) We only have one gift wrapping option: **Signature Wrap**
- 6) The customer is able to leave a gift message if they like. They are only allowed 50 characters, including spaces. If the customer does not want to leave a message please enter pass this field.
- 7) Verify the spelling and any punctuation of the message. The system will ask you if the personalization is correct, if the spelling is correct type "Y" for Yes.
- 8) You can wrap all items in the same box or each individually by selecting each item and "G + line"
- 9) Queen & King coverlets, blankets, comforters cannot be giftwrapped

Key Code Promotions

- 1) These are discounts that are driven by the Key Number (the customer needs to give you the key number. Do not inform the customer of any promotions).
- 2) To apply these types of discounts you must enter it in the key number field. They will be 7 digits long.
- 3) The system will then apply it when you get to the payment screen
- 4) Type "F" for File to move on to the next screen where you can ask the customer for her payment method.
- 5) If the customer tells you about this at the payment screen you will have to escape all the way out of the order and start over.
- 6) The promotion will not show at the end of the order. You must remember the customer's correct total or inform her of her total before entering the payment information.
- 7) Our biggest key code promotion is the \$15 off \$100 or more insert that is in every customer's catalog.
 - a) **Outlet Key Codes-200 Series**
 - The Outlet Key Code always starts with a number in the 200 series.
 - Use the appropriate key code when the customer calls and is placing an order over the phone from the outlet site. Example: 226-9401 (Prefix: 226 Suffix: 9401)

- There is an Outlet Key Code promotion insert inside each catalog. It is specifically for **Outlet** use only.

b) Regular Priced Catalog Key Codes-700 Series

- The Regular Catalog Key Code always starts with a number in the 700 series. The Key number is located on the back of the catalog
- Use the appropriate key code of the current catalog when the customer is calling and placing an order using information from the main site. Example: 798-9401 (Prefix: 798 Suffix: 9401)
- Use the appropriate key code of the current catalog when the customer is calling and placing an order but does not have a key code and is not shopping on the main site. Example: 798-9999 (Prefix: 798 Suffix: 9999)

c) Prospect Catalog Key Codes-100 Series

- The Prospect Catalog Key Code always starts with a number in the 100 series. The Key number is located on the back of the catalog
- Use the appropriate key code of the current catalog when the customer is calling and placing an order but does not have a key code. Example: 198-9999 (Prefix: 198 Suffix: 9999)

d) Sale Catalog Key Codes-600 Series

- The Regular Catalog Key Code always starts with a number in the 600 series. The Key number is located on the back of the catalog
- Use the appropriate key code of the current catalog when the customer is calling and placing an order but does not have a key code and is not shopping on the main site. Example: 67098-9999 (Prefix: 670 Suffix: 9999)

e) Blueprint Catalog Key Codes-800 Series

- The Regular Catalog Key Code always starts with a number in the 800 series. The Key number is located on the back of the catalog
- Use the appropriate key code of the current catalog when the customer is calling and placing an order but does not have a key code. Example: 805-9999 (Prefix: 805 Suffix: 9999)

Discount Coupons, Merchandise Credits and Gift Certificates

- 1) Get all of the items on the order and place the order as normal
- 2) At the payment screen line type a ? and hit Enter
- 3) From the list you will be able to select whether it is a Discount Coupon, Merchandise Credit or Gift Certificate
 - Type the line number of the choice you want and hit Enter
 - At account number type in the number
 - If the customer does not have the discount coupon number, type a “?” in the account number field and enter. This screen will show any coupons, credits and certificates under that customer number.
- 4) You must copy the discount coupon number, escape back to the payment screen, and paste/type it in the account number field.
- 5) Enter past the expiration date. The Authorized amount will show the value of the coupon, credit, or gift certificate what the amount of the coupon, credit or certificate was.
- 6) When the cursor gets to the bottom of the screen type F and Enter to go to a blank payment screen

- 7) Select the credit card type and enter the credit card number
 - a. The amount left over will go on that card
- 8) You can only use **one** Discount coupon per order
- 9) There is no limit of the number of Gift Certificates, Merchandise Credits, or My Club Rewards Discounts that are allowed as payment types on an order.
- 10) If the customer uses a Visa or MC gift card (the gift card must be for the **entire amount** of the order).

TNT

- 1) Enter TNT at the command line of an order
- 2) This will show how long a customer's order will take for delivery

Processing and Shipping Adjustment

- 1) You are able to waive some or all of the processing and shipping of any order (within reason)
- 2) From the payment screen
- 3) After you have applied the credit card go to line 6
- 4) Choose line# 1 and type in – plus the amount
- 5) Type “?” in P&S Code to pull up a list of reasons why the accommodation is being made.
- 6) Choose line# 1 Customer Request- Original
- 7) Then “F” for File
- 8) A negative balance is ok, you can file out of the order.

ADJ+Line# - For Monthly Promotions

- 1) You will receive an email (when available or Spark) when we are running any special promotions that require an adjustment to the customer's item. (For example: There is a special on the Tea Cup below. It's originally \$18.95 but we are selling it for a limited time for \$14.99.)
- 2) Get to your payment screen and Escape 3 times to get to your home screen.
- 3) In order to give the customer the promotional price we need to do an ADJ +line#
- 4) Once you are inside the ADJ screen type “?” to choose your reason code
- 5) You want to choose reason code Monthly Promo #3 then hit Enter
- 6) It will take you back to the main ADJ screen where you can enter in the quantity you are adjusting and the price difference
- 7) You must profile why you are making this adjustment.
 - In order to get out of the profile box hit Escape once, then “F” for file and it will bring you back to your command line.
- 8) Once you are done in the ADJ screen type “F” to file out of the screen
- 9) Notice at the payment screen it will show the original price of the item, the adjustment that was made and the new price of the item.

Deleting an Item

- 1) If you want to delete an item while you are placing an order you need to be on a blank line
- 2) Then hit the up arrow
 - a. That will bring you back to the command line of the previous item
 - b. If this is not the item that you want to delete you can hit ENTER and it will scroll you through the items

- 3) At the command line type D and the line number that you want to delete.
- 4) This will remove the item completely

Direct Ship Items

- 1) We sell a select few items that come directly from the manufacture referred to as Direct Ship items
- 2) Direct ship items can take 4-6 weeks for delivery
- 3) When a customer is ordering a direct ship item there are 3 things you must inform them of:
 - The item ships directly from the manufacture
 - Their credit card will be charged immediately
 - The expected ship date

;DS.REQ- Direct Ship Info Request

- 1) You will use this hotkey to request information about a DS item that is not in the system
- 2) Before doing this please make sure that you check ;AV to see if the information is in there
- 3) The item has to be a DS item

;Forms- Additional Item Information

- 1)** If you the customer is requesting information that you cannot locate online or in ;AV then you want to fill out an Additional Item Information Form
- 2)** Type in ;FORMS
- 3)** Choose form #8- Additional Item Info
- 4)** Once in the form hit Enter twice to get to the Bill To Address
- 5)** Type "?" to lookup the customer's information by last name and zip code
- 6)** Once you have found the customer by last name and zip code please choose the correct address info for the customer.
- 7)** Make sure you have a good contact phone number for the customer. You will be contacting them back at that number once you receive the info they are looking for
- 8)** Hit Enter to get to the Item field
- 9)** Enter the item number the customer is inquiring about.
 - **Do not type in "?" here. It will pull up every item we have in our system**
- 10)** After putting in the item number, type "?" for the types of request the form offers
- 11)** Choose the correct one that applies to the customer inquiry
 - This form is only used for product inquiry that cannot be found in ;AV
- 12)** Enter in your Supervisor initials (assigned to them by Soft Surroundings). You and your Supervisor will receive a copy of the form you filled out.
- 13)** In box #7 list the customer's question about the item
- 14)** You will receive an email answering the customer's inquiry within 24-48 hours. Once you receive the info please contact the customer back with it.

Condensed Procedures