

USPS Retail Clerk Operations and Training Manual



Customer Support Services
1-800-332-0317 – option 2
Customer Support Services Hours:
Monday - Friday 7:30 am - 6:00 pm CT
Saturday and Sunday- Closed

Table of Contents

1. Hallmark and USPS Roles and Responsibility
2. Safety Suggestions
3. Hallmark Fixtures
4. Receiving Orders
5. Maintaining Everyday Counter Cards
6. Point of Sale Replenishment
7. Seasons
8. Maintaining Season Counter Cards and Specialty
9. Customer Support Services/Troubleshooting

1. Hallmark and USPS Roles and Responsibilities

It is important to understand the overall role and responsibility of the Hallmark Retail Merchandiser, Postmaster or Officer in Charge and Retail Clerk. To assist you in planning and prioritizing your card department work flow, the roles and responsibilities for each are outlined below:

Hallmark Retail Merchandiser (RM)

- Develop a strong working relationship with Retail Clerk and Postmaster, or the *Officer in Charge*.
- Maintain a regular call schedule.
- Postmaster or the Officer in Charge should initial the Sign In log.
- Implement all Everyday, Seasonal and promotional programs.
- Insure appropriate merchandising and signing are being used for all promotions.
- Insure all seasonal specialty products displayed in the USPS promotional area are signed and merchandised properly.
- Insure seasonal returns are completed by the Retail Merchandiser within two weeks of the season date.
- Conduct initial and on going training of Retail Clerk.
- Assist with department installations.
- Completes all season credits. Destroy all credited product at the office.
- Look for opportunities to increase sales.

Retail Merchandiser Name: _____

Phone number: _____

Territory Representative Name: Ann Hussey

Phone number: (508) 785-3958

Email address: ahussed@hallmark.com

USPS Postmaster or Officer in Charge:

- Assign a Retail Clerk to **own** the Greeting Card Department.
- Understand greeting card sales trends and seasonality so you can better schedule the Retail Clerk to maximize sales.
- Develop a work schedule taking into consideration the service schedule of the Retail Merchandiser and the seasonal aspects of the business.
- Develop weekly schedule with Retail Clerk to straighten the display.
- Provide back-up to assist Retail Clerk.

USPS Retail Clerk (RC):

- Take **OWNERSHIP** of the card, stationery and ReadyPost® displays and maintains the displays using Service Standards between Retail Merchandiser service visits.
Below is a summary of how the Retail Clerk will help support and maintain the displays between RM visits.

Greeting Card Department Service Standards

I. Everyday Merchandising

- A. Relocate misplaced cards, quickly sight matching if possible and placing in the correct/appropriate pocket.
- B. Insure all pockets contain appropriate product (no empty pockets).
- C. Notify your Retail Merchandiser if you have empty pockets so the RM can perform an audit of the pocket.
- D. Insure all pockets contain appropriate quantity of envelopes.
- E. Insure inventory levels are appropriate.
- F. Insure displays are signed appropriately.

II. Seasonal Set Up and Maintenance

- A. Season Counter outposts are on display according to plan and merchandised appropriately.
- B. Additional service hours are utilized to meet seasonal sales demand.
- C. Season is converted after the holiday according to USPS guidelines.
- D. Seasonal inventory is completed by the Retail Merchandiser within ten days according to USPS guidelines.

III. Organization/Administrative

- A. Department is neat and clean.
- B. All back stock areas are organized as directed.
- C. Utilize Customer Support Services (1-800-332-0317 – option 2) as needed.



Retail Clerk Training Checklist

Office Number: _____ Postmaster: _____
 Retail Clerk: _____ Back-up Retail Clerk: _____
 Training Date: _____

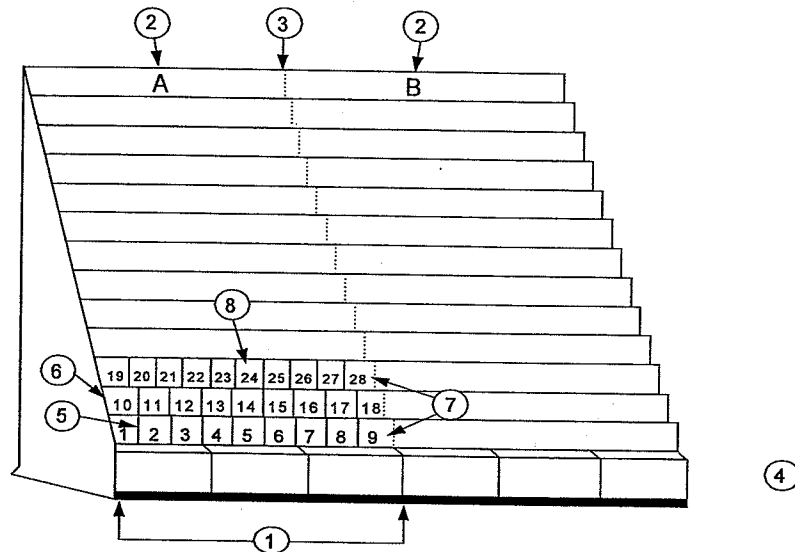
Tasks	Completed	Additional Needed	Follow-up Date
Training Program Overview			
Department Tour and Review			
Retail Clerk Responsibilities			
Hallmark Service Contacts			
Hallmark Territory Representative Responsibilities			
Hallmark Retail Merchandiser Responsibilities			
Everyday			
Job Procedure and Routine			
Everyday Greeting Card Product Knowledge			
ReadyPost® Grid/Planogram			
Counter Card Grid/Planogram			
Stationery Grid/Planogram			
Fixture Location(s)			
Display Maintenance/Straightening			
Put Away an Order			
Low/empty stock level procedure			
Point of Sale Replenishment			
Best Practices			
Packing Slip/Carton Label/Check-In Procedures			
Enter Product rec'd into Item Receipt in POS system			
Fixture and Supply Overview			
Seasons			
Season Overview			
Season Counter Outpost Set-up			
Seasonal Boxed Cards			
Returning Season Product			
Seasonal Return Chart			
Hallmark Communication			
Retail Digest			
Miscellaneous:			
Back Room Organization			
- Incoming Orders/Return Product			
Department Organization			
- Office Area/Under stock/Damages			

2. Safety Suggestions

- Keep the aisles clear of product and trash.
- When lifting, bend at your knees, not at your waist. Keep your back straight and use your leg muscles. If a carton is too heavy to lift, unload part of it or get help.
- When transporting product or trash, stack the trays so that there is visibility over and around them at all times.
- To remove trays from the shipping carton, first tilt the carton and cut the bottom tape. (Always cut away from your body). Fold back three of the bottom flaps and set the carton upright. Next, open the top flaps. You can now easily lift the carton up off the trays. (This applies to both everyday and seasonal shipping cartons).
- When you sort wholesale packages, try to work at a convenient height so you're bending as little as possible.
- Go around obstacles instead of over them whenever possible.
- Walk on the right side of the aisle to avoid congestion.
- Don't carry sharp objects unsheathed in your pockets and don't leave them unprotected or with a sharp edge exposed in your storage drawers.
- Keep all flippers closed that you are not using.
- Do not toss plastic overwrap from wholesales on the floor.

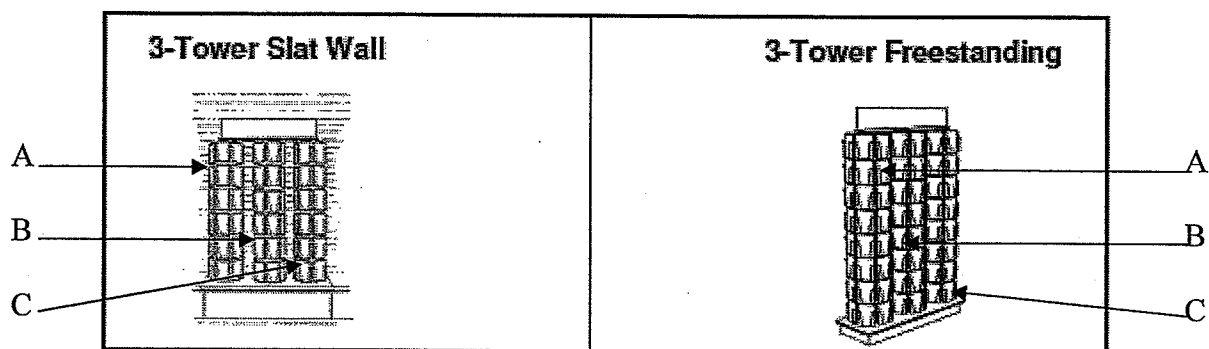
3. Hallmark Fixtures

The diagram and descriptions below explain each part of the greeting card fixture(s).



- Some locations will have fixtures that are 48 inches wide. Others will have spinners (see page 8).
- Each fixture has rows for the cards.
- Each fixture has a letter code (#2). The card system labels its first 4' section as "A". The second section is "B"; each additional section is coded with the next consecutive letter.
- The "flipper" area along the bottom 4 rows of the fixture opens for storage. (#5,6,7)
- Plastic dividers are used between cards to allow each card to have its own "home". Each left-hand divider has a number on it, which identifies the card's location in the section (to the right of the divider clip).
- Each row of cards is separated into "pockets." Pockets are the spaces between numbered plastic dividers. One card design is assigned to each pocket.
- Card pockets are numbered left to right starting at the lower left corner of each fixture.
- Each card has its own pocket by combining the fixture letter code and pocket number. This combination is called a **file number**. The file number for the Number 8 (on diagram above) would be A-24 (Section A, Pocket 24).

Spinner Displays:



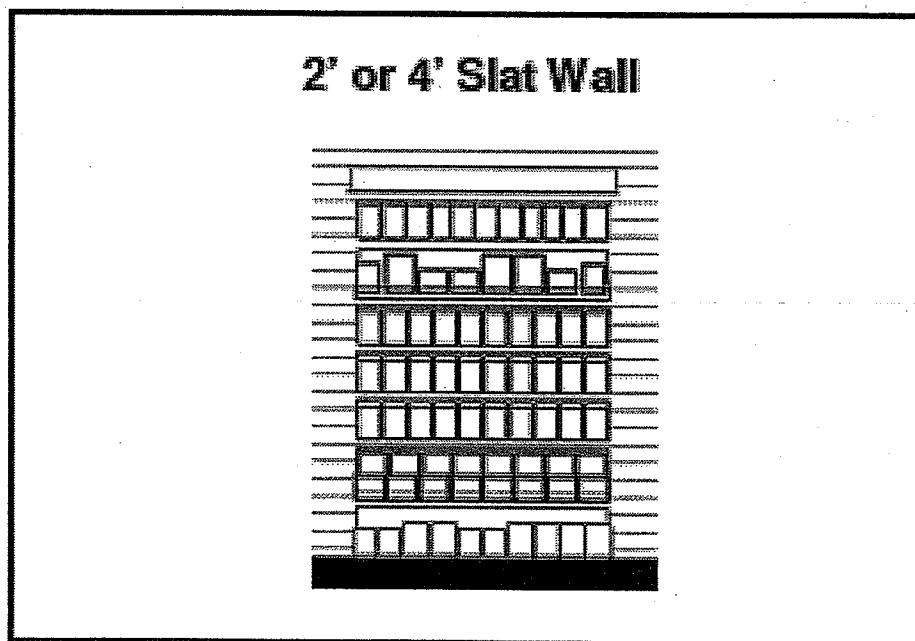
- Each barrel of the spinner has a letter code. Spinner displays will be "A" – "B" – "C". There is a "hang tag" on each pocket identifying the pocket number.
- Pockets are numbered on each row around each barrel, starting on the bottom row.
- Besides card racks, your office also has other fixtures for displaying various Hallmark ReadyPost® product. These fixtures have shelves or wire grids to display packaging materials.

If you have broken fixtures, please contact your Hallmark Retail Merchandiser or the CSS.

1-800-332-0317 – option 2

Stationery Displays:

If your location has either a 2' or 4' stationery display, the product will be displayed on slat wall using hooks and shelves.



4. Receiving Orders

When an order is received, review the following steps with your Postmaster, Officer in Charge, or the Retail Clerk responsible for receiving orders:

Verify the Delivery

- Shipment notification information is sent via email to each location prior to delivery of product.
- Locate the carton which is labeled with the Packing Slip. Check the label of each carton to be sure they belong to your office.
- Count the number of cartons and match it to the Packing Slip.
- Look for damaged cartons.
- If cartons are missing or damaged, note the problem.
- If missing cartons are not delivered within 3 days, notify the Postmaster and call the Customer Support Services at 1-800-332-0317 – option 2.
- If a shipment doesn't arrive notify the Postmaster and call the Customer Support Services at 1-800-332-0317 – option 2.
- If a shipment belongs to another office, refuse the shipment.
- All Hallmark deliveries should have an assigned designated spot in the backroom.

Verify Carton Contents

- If the totals do not match, note the discrepancy on your Packing Slip to receive credit. Call Customer Support Services at 1-800-332-0317 – option 2.
- **Errors found in orders (i.e. quality issues, overages, shortages) must be reported within 30 days of shipment receipt. To report errors, call the ReadyPost® Hotline @ 1-800-332-0317 – option 2 for resolution. Please report any shipment overage/shortage immediately, to insure billing resolution before 30 day deadline.**
- Enter product received into Item Receipt in POS system.
- If an item is back-ordered and you did not receive it, it will be noted on the Packing Slip and will ship with your next order (the following week).

Shipping Label Information

Hallmark uses **shipping labels** designed to facilitate order movement to your office. Every time you receive an order, check the shipping label to verify that this order is for your office. You should be aware of the following information included on the "customer" shipping label:

1. The **Order number** is located on the shipping label. This is a specific number associated with a particular shipment and is used to track shipments. It also can be used to gather information about the order after it has shipped.
 - The **Packing Slip** also contains the Order number.
2. A **Purchase Order Number** may also be assigned to your order when it is processed and can also be used to track the order, identify contents, etc.
3. The Carton () of () totals list the exact carton number along with the total number of cartons included in the shipment.
4. The **USPS Delivery Confirmation Bar Code** is for tracking of the cartons within a shipment.

Return Address:		Parcel Post Postage & Fees Paid USPS Permit No. G-10	
Carefree Industrial Park C/O Hallmark Custom Marketing Independence MO 64058			
ORDER NUMBER →	Order# 3052535	Customer# 1080663	PO# ← PURCHASE ORDER NUMBER
USPS HERITAGE STATION S ATTNPOSTMASTER H 187M10 I 702 RICHLAND HILLS DR P SAN ANTONIO TX 78245-9998			
e/ USPS DELIVERY CONFIRMATION			
			
9102 0071 3111 3032 0892 38			
DAL			
000001_DAL-RRD_L_GND		Carton #:	3 of 4 ← CARTON TOTALS

Hallmark Custom Marketing Packing Slips

You will receive a Packing Slip with each Hallmark order. You can use the Packing Slip to check the shipment's content for "shorts" by counting the number of wholesale units in the carton(s) to make sure the unit count corresponds to the NUMBER OF UNITS shown on the Packing Slip.

Check order in according to USPS guidelines and per your Postmaster's direction.

Hallmark Custom Marketing 1-800-332-0317, Option 2		Ship To: USPS HERITAGE STATION ATTN: POSTMASTER 122 SACHELANHILLS DR SAN ANTONIO, TX 78209-9999 ITEMID		PACKING SLIP ORDER NUMBER: 308205 DATE: 20-JUL-99 PAGE 1 of 1 PURCHASE ORDER NUMBER: CUSTOMER NUMBER: 108881 SHIP VIA: 050001 DAE:RTTL,OND PRODUCT: ITEMID ITEM: 437982						
Line No	RETAIL PCS	UNIT	ORDERED QU	QTY THIS SHIPMENT	ORIG QTY	STATUS	SKU	DESCRIPTION	UNIT PRICE	CUSTOMER PRICE
1	45	25P	3	1	h		000110001	USPS #0000011 Photo/Doc Mail 9.5" x 16.25" (2) [C]	\$1.49	\$1.01
2	14	13P	2	1	h		000110003	USPS #0000013 Card/Tag 1.5" x 3.5" - All Colors	\$1.28	\$1.28
3	65	14P	2	2	D		000110005	USPS #0000015 Envelope 6" x 9" - All Colors	\$1.99	\$1.99
4	24	20P	1	1	h		000110008	USPS #0000018 Photo/Doc Mail 6" x 10" (1) [C]	\$1.26	\$1.41
5	24	14P	1	1	h		000110009	USPS #0000019 Card/Tag 2" x 10" - All Colors	\$1.15	\$1.15
6	24	14P	1	1	h		000110012	USPS #0000012 Card/Tag 2" x 10" - All Colors	\$1.20	\$1.03
7	36	20P	1	1	h		000110014	USPS #0000014 Card/Tag 10.5" x 16" (2) [C]	\$1.69	\$1.33
8	36	20P	1	1	h		000110015	USPS #0000015 Card/Tag 14.25" x 16" (2) [C]	\$1.01	\$1.13
9	10	10P	1	1	u		000110016	USPS #0000016 Photo/Doc Mail 12" x 15"	\$1.59	\$1.35
10	10	10P	1	1	u		000110017	USPS #0000017 Photo/Doc Mail 12" x 15"	\$1.31	\$1.13
11	12	12P	1	1	d		000110018	USPS #0000018 Photo/Doc Mail 12" x 15"	\$1.68	\$1.44
12	3	20P	1	1	d		000110019	USPS #0000019 Photo/Doc Mail 12" x 15"	\$1.39	\$1.04
13	92	22P	1	1	h		000110020	USPS #0000020 Photo/Doc Mail 12" x 15"	\$0.47	\$0.71
TOTAL			16	16						

Cancelled lines represent items which were out of stock at the time of shipping. POSE will reattempt these items with your next order. No further action required.

**PACKING SLIP / NOT AN INVOICE
NO PAYMENT REQUIRED**

If you are short any items, contact **Customer Support Services** at **1-800-332-0317- option 2**

5. Maintaining Everyday Counter Cards

Once the order has been received, it should be checked in (Section 4 – page 9) and then taken to the greeting card area to be unpacked and put away.

Generally, your role will be to relocate misplaced cards, quickly sight matching if possible and placing in the correct/appropriate pocket. If it is necessary for you to put the order away, follow the steps indicated:

1. Count the number of boxes in order to be sure it corresponds to the number of boxes on the shipping label.
2. If you are missing a box, keep track of the box number. It usually arrives the next day. If a box is missing, call the CSS 1-800-332-0317 – option 2 and let them know the number of the box that is missing and reference the Packing Slip number.
3. Find the Packing Slip on Box 1 and give it to your Postmaster.
4. Open the boxes of cards first.
5. Separate all stock by the file code in top right corner (A,B,C, etc.) placing in the tray with one letter lying horizontally and the next vertical.
6. Unload ReadyPost® and stationery (if applicable) product from the boxes, sort by format and place in cart.

Every section has a letter code from A-D (depending on the size of your display). Each section is numbered on the plastic divider from the bottom left side to the top right. This tells you the pocket number of that section. Fixture breaks indicate potential change in sections or the next barrel of the spinner.

EACH DISPLAY SECTION WILL HAVE A GRID IDENTIFYING THE LOCATION OF THE SPECIFIC SKU.

Use the "grid" provided for each section to determine where the stock number (BGC91377) belongs within the display: The grid lists the specific stock number of the card and the pocket number (A101).

A109 TEST 1002	A110 TEST 1000	A111 BGC 91282	A112 BGC 78664	A113 BGC 88580	A114 BGC 91372	A115 BGC 91386	A116 BGC 91377	A117 BGC 91378
A100 TEST 1003	A101 TEST 1001	A102 BGC 91287	A103 BGC 85845	A104 BGC 88233	A105 BGC 88581	A106 BGC 91383	A107 BGC 91374	A108 BGC 91382
A91 TEST 1004	A92 TEST 1005	A93 BGC 80785	A94 BGC 91438	A95 BGC 88822	A96 BGC 88823	A97 BGC 91287	A98 BGC 71127	A99 BGC 91288
A92 TEST 1007	A93 TEST 1008	A94 BGC 91270	A95 BGC 86048	A96 BGC 91438	A97 BGC 85189	A98 BGC 80338	A99 BGC 80362	A00 BGC 88204
A79 TEST 1006	A74 TEST 1009	A75 BGC 91277	A76 BGC 83785	A77 BGC 91251	A78 BGC 91252	A79 BGC 84542	A80 BGC 43506	A81 BGC 83726
A84 TEST 1011	A85 TEST 1010	A86 BGC 88238	A87 BGC 91260	A88 BGC 91249	A89 BGC 88239	A90 BGC 91443	A91 BGC 98927	A92 BGC 86084
A55 BGC 91279	A56 BGC 91280	A57 BGC 91284	A58 PCB 13817	A59 BGC 86284	A60 BGC 98495	A61 BGC 88308	A62 BGC 88305	A63 PCB 73838
A48 BGC 83714	A47 BGC 91283	A48 BGC 88958	A49 BGC 88981	A50 BGC 86282	A51 BGC 93140	A52 BGC 88308	A53 BGC 83787	A54 BGC 91441
A97 BGC 88280	A98 BGC 85047	A99 BGC 90990	A40 BGC 85954	A41 BGC 85953	A42 BGC 80780	A43 PCB 3138	A44 BGC 83731	A45 BGC 80895
A28 BGC 91221	A29 BGC 86825	A30 BGC 88281	A31 BGC 85852	A32 BGC 91298	A33 BGC 86497	A34 PCB 0341	A35 BGC 73861	A36 BGC 88308
A19 BGC 88978	A20 BGC 87105	A21 BGC 84887	A22 BGC 88872	A23 BGC 88148	A24 BGC 86143	A25 BGC 91290	A26 BGC 86498	A27 BGC 80893
A10 BGC 85828	A11 BGC 78792	A12 BGC 85878	A13 BGC 85871	A14 BGC 78670	A15 BGC 91298	A16 BGC 85702	A17 BGC 88323	A18 BGC 85105
A1 BGC 91207	A2 BGC 80753	A3 BGC 87086	A4 BGC 88360	A5 BGC 88625	A6 BGC 78836	A7 BGC 78784	A8 BGC 91288	A9 BGC 71057

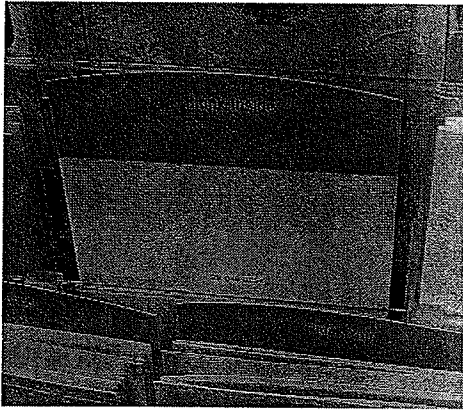
You may also use the Cross Reference Sheet to easily locate the correct pocket number. The Cross Reference Sheet is sorted by SKU numeric/alpha listings:

Pocket #	Alpha code	Numeric Code
A12	PBGC	84717
A18	PBGC	85061
A4	PBGC	88121
A9	PBGC	88305
A3	PBGC	93811
A31	PBGC	94968
A11	PBGC	94970
A10	PBGC	94971
A6	PBGC	94972
A15	PBGC	94973
A23	PBGC	94974
A5	PBGC	94975
A24	PBGC	94977
A16	PBGC	94978
A33	PBGC	94982
A34	PBGC	94983
A29	PBGC	94992
A36	PBGC	96439
A14	PBGC	96752
A28	PBGC	96762
A32	PBGC	96767
A25	PBGC	96778
A1	PBGC	96784
A20	PBGC	96786

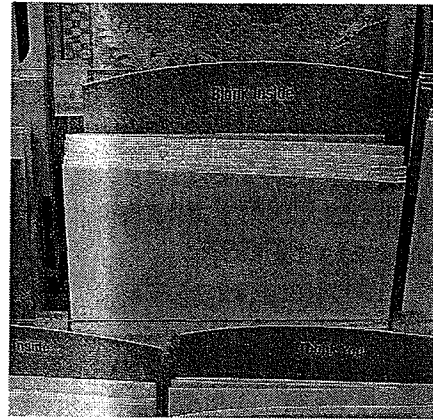
Important: Begin to put your order away by taking your first package of cards and:

- The PID (Pocket Identifier) should be placed in the back of the pocket with envelopes next and then cards in front.
 - If your cards are displayed on a spinner, you will need to fold the PID "up" so that it forms a pocket in the wire holder.
- Turn the envelope flaps so they are facing the back of the pocket and not the cards. This will help to keep the display neat and orderly as customers shop.

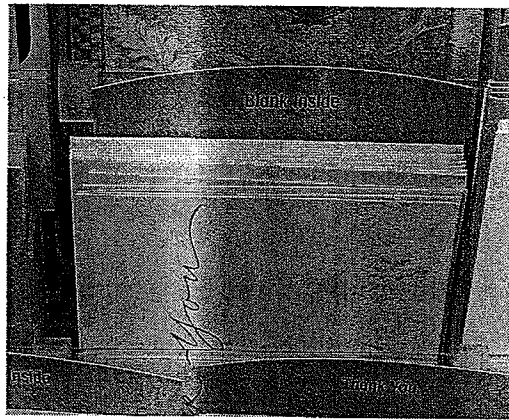
Setting the Product in the Pocket: In-line display



Place the PID in the Pocket



Place Envelopes as pictured.



Place cards in front of envelopes

Setting the Product in the Pocket: Spinner



Turn the PID "up" in the pocket

6. Point of Sale Replenishment

Point of Sale Replenishment (POSR) is an automated reorder process for Hallmark Custom Marketing product based on office specific POS (point-of-sale) information to determine when and how much to replenish/reorder a specific product. POSR inventory is calculated by adding shipments, subtracting sales, and processing inventory adjustments and audits.

➤ **Advantages of POSR:**

- Reorders generated on a daily basis
- Empty pockets reduced
- MQOH (Minimum Quantity On Hand) will adjust for fast selling SKUs and peak selling periods
- Service time is reduced by not having to place a reorder

➤ **The one, tons, or none rule:**

- Pockets that are continually empty
- Full pockets that keep receiving additional orders
- Pockets that always have low stock levels and are potential "outs".
- If any of the above situations occur in your Hallmark department, please contact your Retail Merchandiser or Customer Support Services, for an audit to be performed.

➤ **Keys to success with POSR:**

- Each individual and entire UPC must be scanned through the register using IMD or POS terminal.
- Do not scan one card and enter multiple quantities.
- Call the CSS to correct inventory discrepancies based on the one, tons or none rule.

➤ **Helpful hints before contacting the CSS:**

- Use SKUs rather than pocket numbers.
 - Reference the grid or cross reference document if pocket is empty.
- Insure that all orders have been put away
- Check and account for any back stock

7. Seasons

Most of season sales occur just before the holiday. Check with your Postmaster or Officer in Charge about working additional hours in the Hallmark department the week(s) before each season.

8. Maintaining Season Counter Cards

- It is best to stock seasonal cards early in the morning or other low traffic times to allow you to easily access the product with minimal interruption.
- Bring back stock to the location of the corrugate (cardboard temporary merchandising solution).
- Straighten product.
- Relocate misplaced cards, quickly sight matching if possible. If a match is not found immediately, pull the single misplaced cards and place the cards in the back stock tray. These cards will be put back on display only if the office runs low on seasonal inventory.
- Fill empty pockets or pockets containing only one or two cards using the same design (if available).
- If no matching designs, then fill by caption to insure that best selling captions are always available.
- Remove damaged cards from the display and set aside to be inventoried at the end of the season.
- Replace missing or damaged envelopes and discard damaged Pocket Identifiers (PIDs).
- Back-up seasonal cards should be stored close to the display whenever possible
- Season cards should be kept in trays, labeled by caption so they can easily be found. If you have to keep seasonal back stock in the back room, make sure it is clearly labeled.
- When displaying multiple packs of the same design in a pocket, leave the existing stock in the pocket, handle the new wholesale pack, with one hand separate cards and envelopes in the pocket, then slide the new cards and envelopes into the pocket between the existing cards and envelopes.
- It is important to double display all seasonal cards the 10 days before the holiday. Put like captions in the same pocket. You can use two PIDs in one pocket and as the product sells down take the extra design and PID and move to fill an empty pocket.
- Keep all pockets as full as possible putting all reserve stock on display the week before the holiday.
- At the end of each season, the leftover cards are processed for credit. Your Retail Merchandiser will work with you to insure that your office receives the correct credit amount for the remaining cards. All remaining cards will be rendered unsaleable and recycled/disposed of at the office.

9. Customer Support Services/Troubleshooting

The Customer Support Services (CSS) service personnel are available to help you with many issues that affect you and your office.

- Touch-tone callers can reach the CSS by dialing 1-800-332-0317 – option 2. The automated Voice Response Unit (VRU) will ask you to select an option to direct your call.
 - The (2) option: "For ReadyPost® Shipping and Supplies". CSS representatives are available to assist with order status, shipping information and other questions.
 - The Customer Services area can assist you with questions about all of your Hallmark Custom Marketing products (ReadyPost®, Sunrise greeting cards, Heartline stationery).
- Make sure you have all pertinent information ready for the CSS representative.
 - Fedstrip number:
 - Customer Number:
 - Office location (City/State)
 - Packing Slip # (if calling about a specific shipment)
 - Carton # (if you are missing one from a shipment)
- Tell the representative your name and that you are a Retail Clerk for USPS.
- Talk about one subject at a time, speaking clearly and concisely.

The CSS can also help you with:

- Check on missing orders and cartons.
- Check on stock availability as well as order delays/backorders.
- Check shipping information including: ship dates, number of cartons shipped, mixed shipments, contents of cartons.
- Assist with lost, damaged, mis-deliveries or shortage of cartons and product.
- Assist damaged product discovered in carton.
- Assist with mixed shipments (product in the box is not yours, while carton label indicates it is for your office).
- Verify layout grids for your location.
- Answer questions about replacement Packing Slips.
- Order seasonal signing, replacement envelopes, etc.
- Verify Hallmark's receipt of order or inventory transmission (about 72 hours after transmitting).
- POSR – Updates on inventory levels, and adjust reorder point up or down for your location.

Customer Support Services

1-800-332-0317 – option 2

Customer Support Services Hours:

Monday - Friday 7:30 am - 6:00 pm CT

Saturday and Sunday- Closed