

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

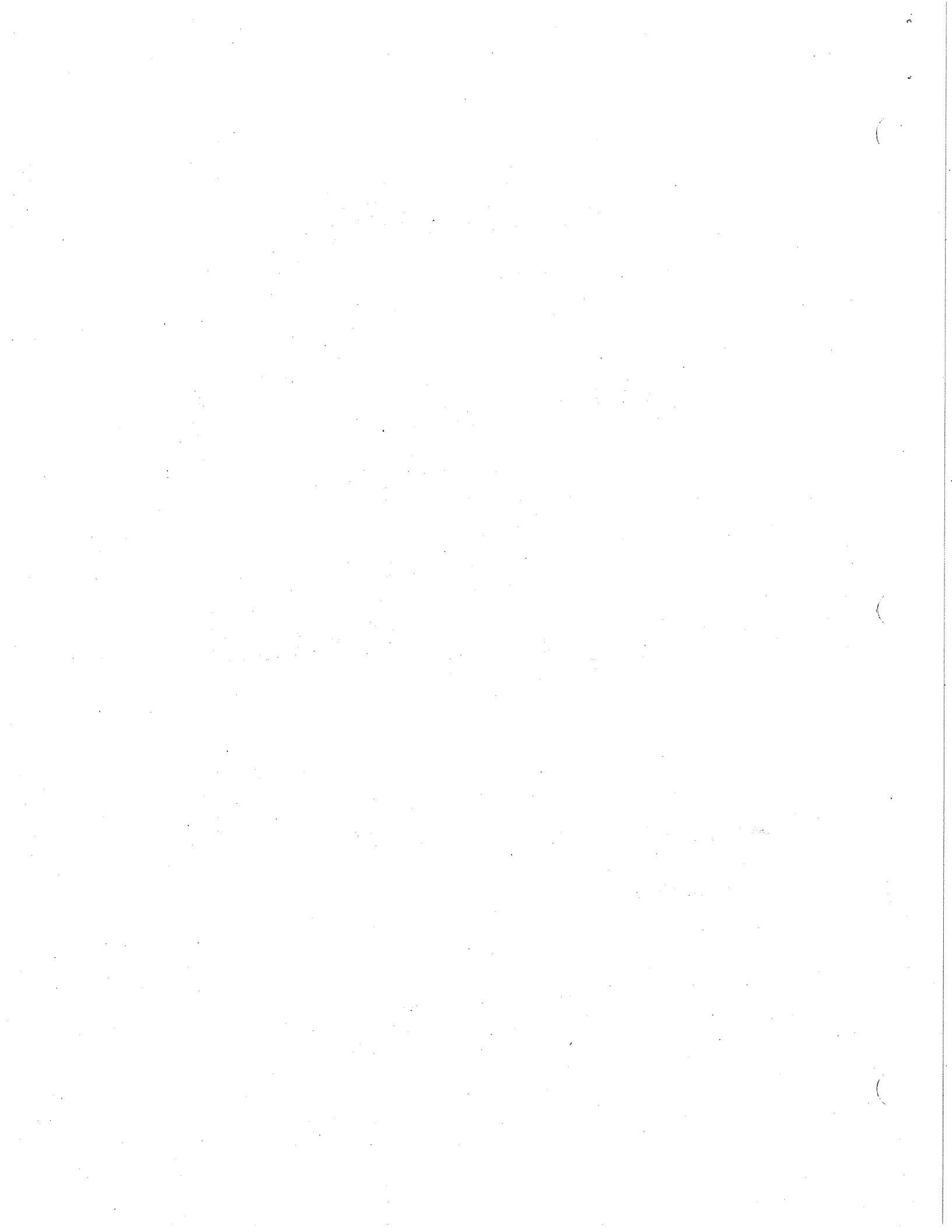
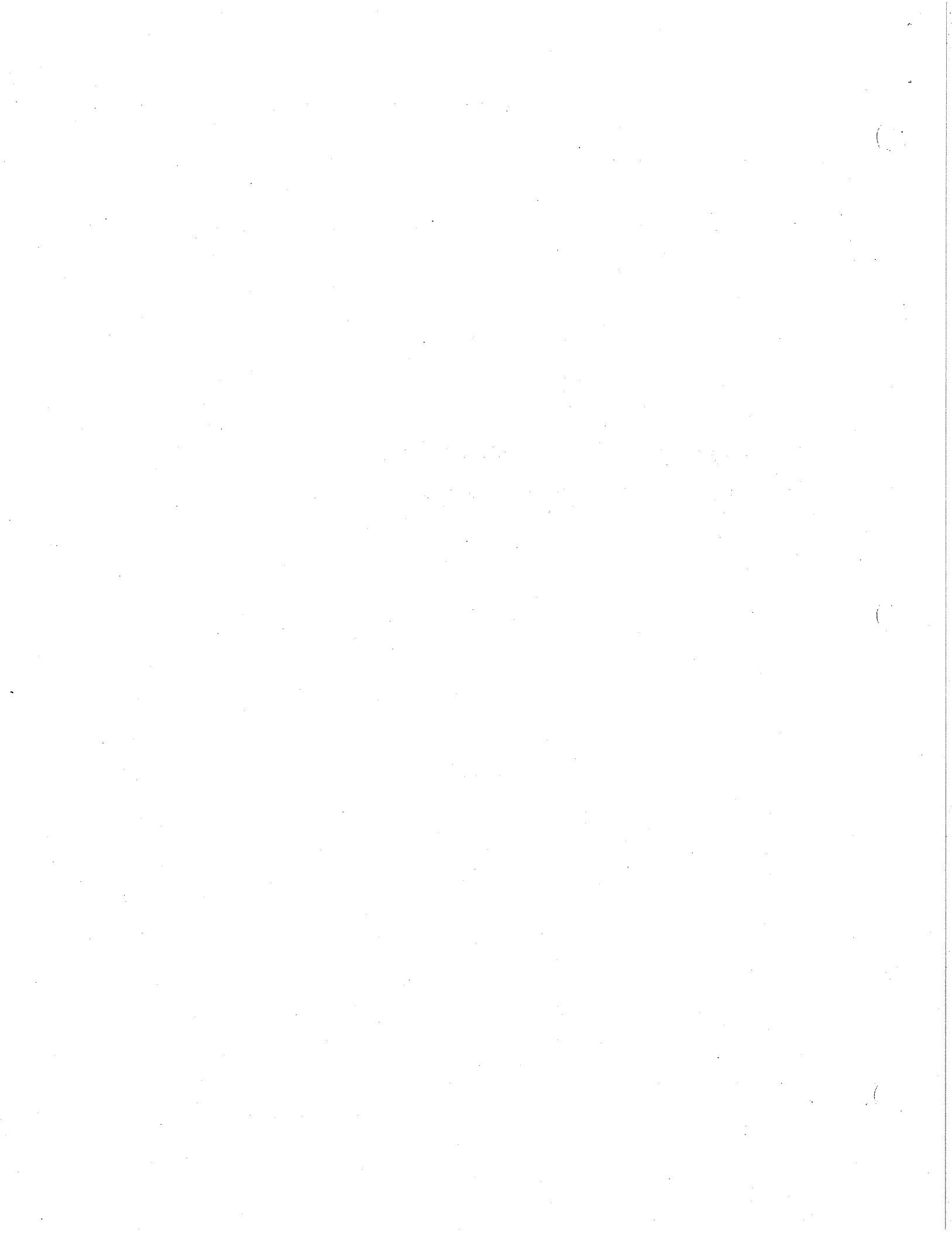


Table of Contents

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: _____

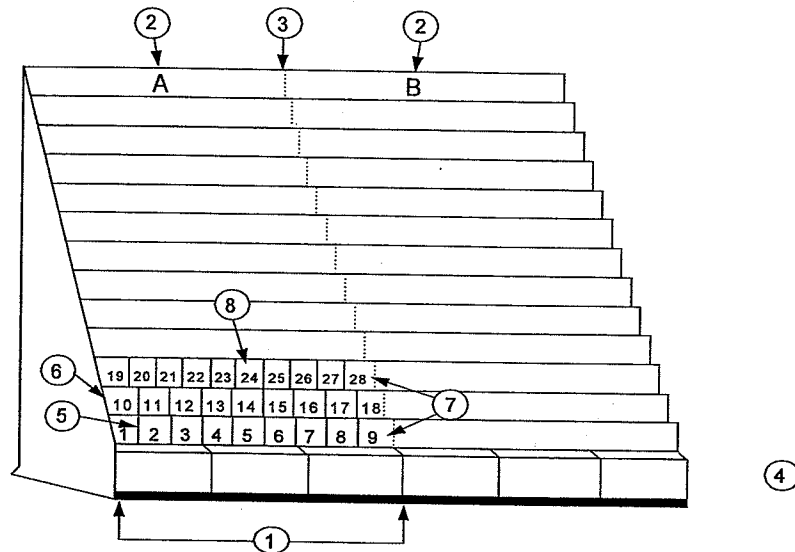
Tasks	Completed	Additional Needed	Follow-up Date
Training Program Overview			
Department Tour and Review			
Retail Clerk Responsibilities			
Hallmark Service Contacts			
Hallmark Territory Representative Responsibilities			
Hallmark Retail Merchandiser Responsibilities			
Everyday			
Job Procedure and 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.

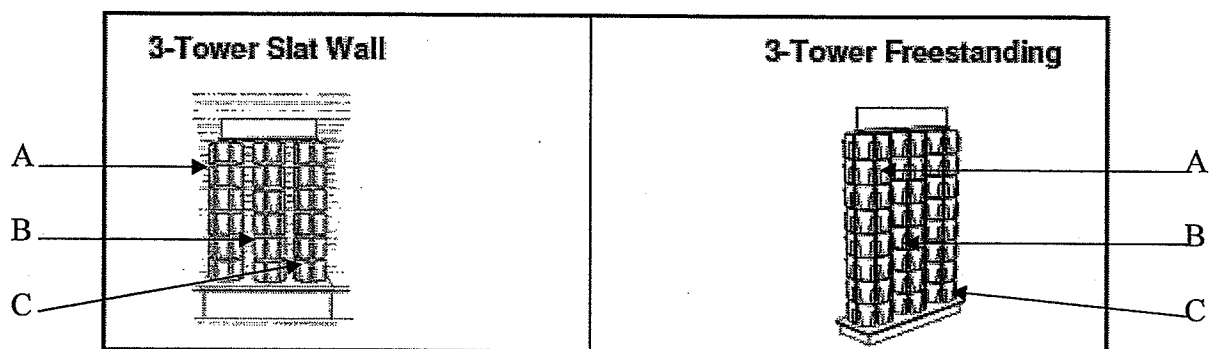
3. Hallmark Fixtures

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:



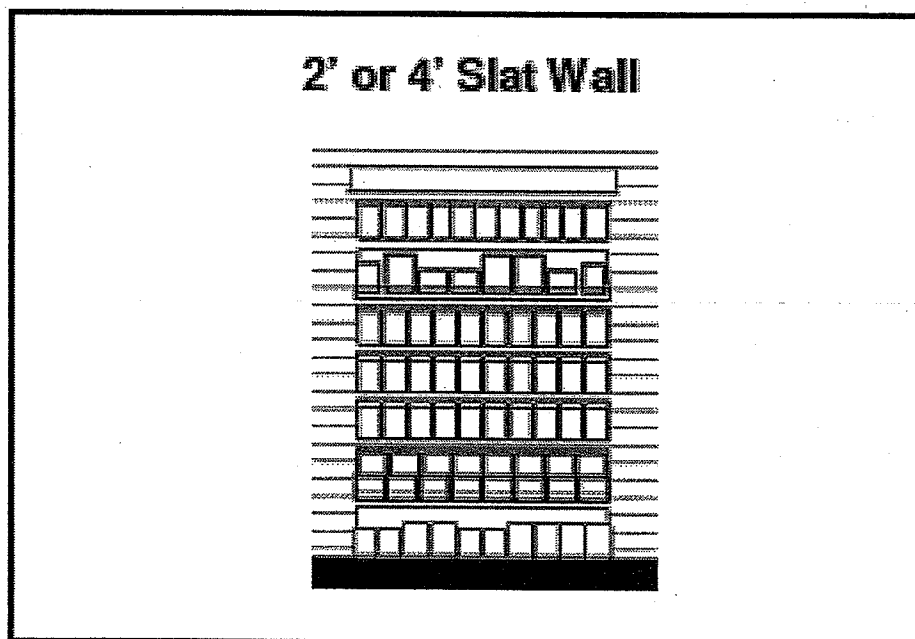
- Each barrel of the spinner has a letter code. Spinner displays will be "A" – "B" – "C". There is a "hang tag" on each pocket identifying the pocket number.
- Pockets are numbered on each row around each barrel, starting on the bottom row.
- Besides card racks, your office also has other fixtures for 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 39			
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.

Class No	RETAIL PCS	UNIT	ORDERS	QTY THIS SHIPMENT	ORIG QTY	STATUS	SKU	DESCRIPTION	UNIT PRICE	CUSTOMER PRICE
45	25P	3	1	1	1		000110001	USPS #00000011 Photo/Doc Mail 9.5" x 12.25" (2) [C]	\$1.49	\$1.01
46	13P	2	1	1	1		000110002	USPS #00000012 Photo/Doc Mail 11.5" x 15.5" - All Color	\$1.29	\$1.29
48	14P	2	2	2	2		000110003	USPS #00000013 Photo/Doc Mail 6" x 9" - All Color	\$1.29	\$1.29
49	20P	1	1	1	1		000110004	USPS #00000014 Photo/Doc Mail 6" x 10" (1) [C]	\$1.29	\$1.41
50	14P	1	1	1	1		000110005	USPS #00000015 Photo/Doc Mail 7" x 10" - All Color	\$1.29	\$1.15
51	14P	1	1	1	1		000110006	USPS #00000016 Photo/Doc Mail 8.5" x 11" - All Color	\$1.29	\$1.03
52	20P	1	1	1	1		000110007	USPS #00000017 Photo/Doc Mail 10.5" x 15" - All Color	\$1.29	\$1.29
53	20P	1	1	1	1		000110008	USPS #00000018 Photo/Doc Mail 14.25" x 19" - All Color	\$1.01	\$1.13
54	10P	1	1	1	1		000110009	USPS #00000019 Photo/Doc Mail 12" x 15"	\$1.29	\$1.29
55	10P	1	1	1	1		000110010	USPS #00000020 Photo/Doc Mail 12" x 15"	\$1.29	\$1.13
56	12P	1	1	1	1		000110011	USPS #00000021 Photo/Doc Mail 12" x 15"	\$1.29	\$1.13
57	8P	1	1	1	1		000110012	USPS #00000022 Photo/Doc Mail 5.5" x 8.5" - All Color	\$1.29	\$1.04
58	22P	1	1	1	1		000110013	USPS #00000023 Photo/Doc Mail 14" x 19" - All Color	\$1.29	\$1.13
TOTAL	264	18	18	18	18					

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	A110	A111	A112	A113	A114	A115	A116	A117
TEST	TEST	BGC	BGC	BGC	BGC	BGC	BGC	BGC
1002	1000	91282	78664	88590	91372	91386	91377	91373
A100	A101	A102	A103	A104	A105	A106	A107	A108
TEST	TEST	BGC	BGC	BGC	BGC	BGC	BGC	BGC
1003	1001	91287	85845	88299	88581	91383	91374	91382
A91	A92	A93	A94	A95	A96	A97	A98	A99
TEST	TEST	BGC	BGC	BGC	BGC	BGC	BGC	BGC
1004	1005	80785	91438	88822	88823	91287	71127	91288
A92	A93	A94	A95	A96	A97	A98	A99	A00
TEST	TEST	BGC	BGC	BGC	BGC	BGC	BGC	BGC
1007	1008	91270	96048	91438	85189	80338	80362	88204
A79	A74	A75	A76	A77	A78	A79	A80	A81
TEST	TEST	BGC	BGC	BGC	BGC	BGC	BGC	BGC
1006	1009	91277	93785	91251	91252	84542	43506	83726
A84	A85	A86	A87	A88	A89	A90	A91	A92
TEST	TEST	BGC	BGC	BGC	BGC	BGC	BGC	BGC
1011	1010	88038	91260	91249	88299	91443	98927	96084
A55	A56	A57	A58	A59	A60	A61	A62	A63
BGC	BGC	BGC	FSB	BGC	BGC	BGC	BGC	FSB
91279	91280	91284	73817	86294	98495	88308	88305	73838
A48	A47	A48	A48	A50	A51	A52	A53	A54
BGC	BGC	BGC	BGC	BGC	BGC	BGC	BGC	BGC
83714	91283	88958	88981	86282	93140	88308	83787	91441
A97	A98	A99	A40	A41	A42	A43	A44	A45
BGC	BGC	BGC	BGC	BGC	BGC	FSB	BGC	BGC
88288	85047	90990	85954	85959	80788	3138	83731	80895
A28	A29	A30	A31	A32	A33	A34	A35	A36
BGC	BGC	BGC	BGC	BGC	BGC	FSB	BGC	BGC
91221	86825	88281	85852	91298	86497	0341	73861	88308
A19	A20	A21	A22	A23	A24	A25	A26	A27
BGC	BGC	BGC	BGC	BGC	BGC	BGC	BGC	BGC
88878	87105	84887	88872	88148	86143	91290	86498	80893
A10	A11	A12	A13	A14	A15	A16	A17	A18
BGC	BGC	BGC	BGC	BGC	BGC	BGC	BGC	BGC
85828	78792	85878	85871	78670	91298	85702	88323	85105
A1	A2	A3	A4	A5	A6	A7	A8	A9
BGC	BGC	BGC	BGC	BGC	BGC	BGC	BGC	BGC
91207	80753	87086	88360	88625	78836	78784	91288	71057

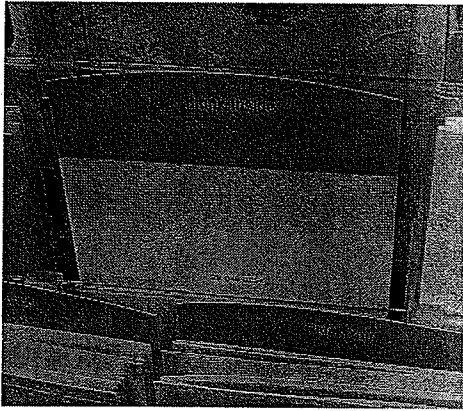
You may also use the Cross Reference Sheet to easily locate the correct pocket number. The Cross Reference Sheet is sorted by SKU numeric/alpha listings:

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

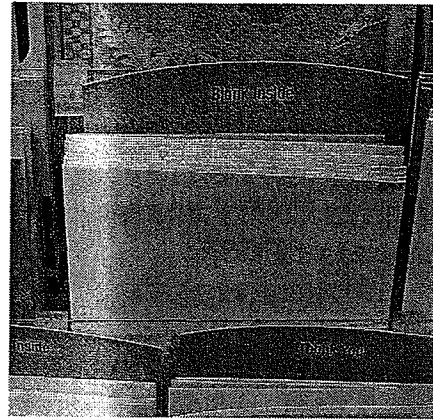
Important: Begin to put your order away by taking your first package of cards and:

- 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