

Close to My Heart Inquires

Incident type: Demonstrator Relations

Description: Close To My Heart/CTMH {Maker's name} {question or concern}

Initiated by: Customer or Demonstrator (A maker is currently identified as a customer in our system)

Comment: Brief note explaining the call and your reply

IMPORTANT: If a demo contacts us with CTMH questions or concerns log this under their demonstrator ID. If a CTMH maker contacts us log this under one of the house CTMH accounts.

US House Account - Demo ID# [2296514](#)

CA House Account - Demo ID# [2296518](#)

Additional Information Links

Hot Topics 2/28: [CTMH General Information](#)

Hot Topics 3/28: [Speaking the Same Language as Close to My Heart Makers](#)

Hot Topics 3/28: [CTMH Emails, Schedules, and Updates from Kevin Lunt](#)

Call Tag

Incident type: Orders & Shipping > Call Tag

Description: Call Tag

Order number: Original order number

Initiated by: Customer or Demonstrator (who requested it?)

Comment: Brief note explaining why the call tag is needed and include the following information in this format:

- Email
- Name
- Address
- Phone

****Leave the incident in OPEN under your name****

Process:

- Inform the caller that they will need to remove the old label and write on the box “UPS Call Tag”. Then, two days after the call, they need to place the package outside their door. UPS has 3 attempts to pick up the package. Once the caller has left the package on their porch, they are no longer responsible for it (even if it is stolen).
- If you have any questions, please reach out to Resolutions.

Call Tag vs. RMA

- Complete a Call Tag for a complete order.
- Complete an RMA for one item or only a few items from an order.
- SCEM's are now done as RMA's NOT Call Tags.

Canadian Exchange Process

IMPORTANT: If the product is under \$75, you may create a correction order instead and send it out. If the product is over \$75, **do not create a correction order.** Create this incident and resolutions will email the form and instructions to the demonstrator/customer.

Incident type: Orders & Shipping > CA Defective/Damaged Product

Description: Canada Defective/Damaged item

Order number: Original order number

Item number: Item number of defective/damaged product

Initiated by: Customer or Demonstrator (who requested it?)

Comment: Brief note explaining the exchange and include the following information in this format:

- Item number, name, and description
- Email
- Name
- Address
- Phone

****Leave the incident OPEN in your name****

Next Steps & More Information

- Resolutions will take care of the correction once they receive the completed form and pictures from the demonstrator/customer.

Cancel Order Request

IMPORTANT: Orders can be canceled if they have **NOT** been shipped yet. If the order has been shipped, complete a delivery intercept incident instead. Please make the caller aware that once the order is canceled, the refund will take up to 5-7 business days to reflect.

Incident Type: Orders & Shipping > Cancel Order

Description: Cancel Order Request

Order Number: Order number to cancel

Initiated by: Customer or Demonstrator (who requested it?)

Comment: Brief note as to why they would like the order canceled.

****Leave the incident in OPEN in your name****

Next Steps

- Once you have completed the incident, provide the order number and the incident number in the Order Resolutions 2.0 Chat to request the cancellation.

More Information

- If this is a Canadian order, it must be taken care of on the same day the order was placed and while the Resolutions team is available. If the order can't be canceled, it will go out and will need to be returned.

Change of Address (COA)

IMPORTANT: If this is for a starter kit, please note in the incident why the address needs to be changed and reach out to Nina or Lana so they can verify the address.

Incident type: Orders & Shipping > Change of Address (COA)

Description: Change of Address on Order or Starter Kit Order (whichever is applicable)

Order number: Order number that needs the address changed

Initiated by: Customer or Demonstrator (who requested it?)

Comment: Brief note on why the COA is requested (order was sent to old address, customer forgot to change address, etc.). This way we will be able to know if errors are happening in shipping. Include the following information in this format:

- Email
- Name

- Address
- Phone

****Leave the incident OPEN in your name****

Next Steps

1. Once you have completed the incident, provide the order number and the incident number in the Order Resolutions 2.0 Chat to request the change.
2. **Be sure to update the address in the caller's profile so this does not happen again!**

Deceased Demonstrator (Updated 12/05/2023)

IMPORTANT: This incident should be opened under the deceased demo's ID. If another demo is calling, then also open an incident under their profile. Keep the detailed comments under the deceased demo and then add "See incident XXXXXXXX" in the other incident or copy/paste comments.

Incident type: Compliance & Policies > Deceased Demonstrator

Description: Deceased Demonstrator

Initiated by: N/A (put the caller in the comments)

Comment: You will need the following information in the comments, so please make sure to verify and collect this information before the caller gets off the phone:

- Demonstrator's full name
- Demonstrator ID number
- The address of the person in charge of the estate. This is where we will mail condolences and correspondence, as well as next year's tax documents, if applicable.

- Name(s) of family members or appropriate individuals that formal information and instructions regarding the demonstratorship should be sent to. This is now a letter. Sympathy cards will no longer be sent.

****Leave the incident in OPEN under your name****

Next Steps & More Information

1. Advise the caller that a condolence letter will be sent to the address which will also contain other important information.
2. **Do not cancel any subscriptions or initiate any refunds!**
3. If another demo was the one who called, call the phone number on file to verify with the family if the information is correct. If you are not able to get in contact with any of the family, please leave a voicemail. If that is not an option, you can send an email to the address on the profile and reference the incident number. If this is all that can be done, please add the information to your comment with “left voicemail” or “sent email” and close the incident. Unless we hear back from someone connected to the estate, the P&E Team has asked we allow the account to drop naturally.
4. Once you have collected *all* the above information from next of kin or executor of the estate, fill out [this](#) form, leave the incident open and the Policy & Education Team will complete the process. Agents will receive notification when they can close their incident.

Deceased Demo Call Flow (for voice messages or emails)

Hello _____

We received a call from _____ letting us know that our valued Stampin' Up! demonstrator _____ has passed away. We are so sorry to hear such heartbreaking news. We would like to send a condolence letter with more information, so please contact us so we can process

the account's closure, such as cancelling any subscriptions or depositing any outstanding commissions. We hope to make this transition as simple as possible, so if there are ever any questions, please contact 800-STAMPUP (800-782-6787). Please accept our heartfelt condolences for your loss.

Delivery Intercept

IMPORTANT: This should be completed if the order has shipped but we need to interrupt the delivery process for issues such as return to sender or change of address. Orders can be canceled if they have **NOT** been shipped yet.

*****Reminder - Mail Innovations cannot be intercepted*****

Incident type: Orders & Shipping > Delivery Intercept

Description: Delivery Intercept

Initiated by: Customer or Demonstrator (who requested it?)

Comment: Brief note and include the following information in this format:

- Email
- Name
- Address
- Phone
- Deliver intercept fee charged or waived. If waived, why?

****Leave the incident in OPEN in your name****

More Information

- The agent who takes the call is the one who charges the intercept fee. Before they do, they also need to look at how it shipped (shipment detail):
 - **Mail Innovations:** We CANNOT intercept it.
 - **UPS SurePost:** Agents need to check with Resolutions. These can only be intercepted to return to sender and a replacement must be sent to the correct address.
 - **UPS Ground/2nd Day/Next Day:** The agent charges the intercept fee (item #116451) in a correction and leaves the incident open if it has not been delivered. From there Resolutions will take care of it.

Escalation

IMPORTANT: An escalation is only done when the demonstrator or customer *requests* to speak to a supervisor or manager.

Incident type: Please log this under the incident type that the issue is related to. Example: Demo is upset about the way we ship our packages. Please log under incident type: Orders & Shipping > Shipping.

Description: ESCALATION: {state the issue}

Order number: If applicable

Item number: If applicable

Comment: Brief overview of why the demo or customer is upset. What you told the demonstrator in the call and any other pertinent information. Include the phone number and best time to contact them.

****Leave the incident in OPEN under your name****

Next Steps & More Information

1. Inform the demonstrator that the supervisor will return the call within 24 – 48 business hours.
2. Fill out and submit the *DS Help Request Escalation Ticket* in SharePoint.
3. Your supervisor will contact you when this has been taken care of. You will also be receiving an escalation quality monitor form that you will need to view, initial, date, and send back to your supervisor. This score will affect the “better your best” score on your DSEER.

Exchange US

IMPORTANT: If this is a Canadian Exchange, please see the Canadian Exchange Process incident template.

Incident type: Orders & Shipping > Exchange Issues US

Description: {What do they want to exchange and why}

Order number: Original order number

Item number: Item number to exchange

Initiated by: Customer or Demonstrator (who requested it?)

Comment: Brief note of the information you gave the caller.

Next Steps & More Information

- Please inform the demonstrator/customer of the exchange policy and where to find the exchange order form. Send the [US Exchange Order Form](#) to them if needed. **They will be responsible for shipping the items back to us. We will pay to ship the new items to them.**
- If there are any overages (extra money owed by the customer/demo), these amounts will not be considered in their CSV retail. Payment can be “card on file” or “please contact me for

payment information". **We do not accept personal checks.** We encourage the exchange to be the same dollar amount. See the exchange form totals [here](#) for more information.

EXCHANGES AND REFUNDS POLICY (this can be found on the website): New, unused merchandise may be exchanged at no charge within 90 days of the shipping date. The merchandise must be in the current catalog and in original shipping condition. Stamps that have been assembled cannot be exchanged. Download the customer exchange form [here](#). Send the completed form, along with the product, to the return address located near the bottom of the form. Sorry, we do not offer cash refunds. If you should require assistance, please contact your demonstrator.

Feedback

Incident Type: Please log this under the incident type that the issue is related to. Example: Demo is upset about the way we ship our packages. Please log under incident type: Orders & Shipping > Shipping.

Description: FEEDBACK: {state the issue}

Order number: If applicable

Item number: If applicable

Comment: Explain what the feedback about the issue is and/or suggestions from the caller.

Next Steps & More Information

- Leave the incident in open under your name only if you need to follow up on it and contact the caller, if not resolve it.
- If you feel the feedback warrants immediate or further attention, please let a supervisor know.

- If you feel feedback should be escalated to an LT member, read through [Feedback Triage Process Document](#).

Fraud Orders

IMPORTANT: Please only create ONE incident even if there are multiple orders.

Incident type: Orders & Shipping > Assistance with Order. If the order has not shipped and needs to be canceled, log it under Orders & Shipping > Cancel Order.

Description: Fraud

Order number: Order number affected (if there is more than one order, place this information in the comments)

Initiated by: Customer or Demonstrator (who requested it?)

Comment: Fraud order number(s) as well as what you need to know to follow up on or any information needed to locate the order. Include the following information from the order:

- Name
- Address
- Ship to phone
- Email

Next Steps

1. Instruct the caller to change the password on their profile and email account **immediately!**
Also advise the caller to change their password often over the next few months, if not longer.
2. Instruct the caller to dispute the charge with their bank or credit card company. If the method of payment is on a checking/savings account on the payment profile, there is a possibility the bank will not refund the charge because of differences between dispute management for bank

accounts and credit card regulations. If the payment were made with a credit card, the bank should dispute the charge.

3. Recommend the caller **remove all payment methods from their account** (but not the direct deposit account information).
4. Reach out to Demo Payments with the **Demo #, Order #, Incident # and Last 4 of the credit card that was used**. They will add the information to their fraud queries.
5. Contact Tiffany or any of the DS supervisors and let them know of the situation.
 - a. If Coupon Codes/Product Credits were redeemed in the order – ask Tiffany, or supervisors if they can be restored.
6. Let the caller know that we will be placing a sanction on their account to protect them from hackers placing other orders. This sanction will be in effect for as long as the caller wants.
7. In the front notes of any affected orders put **FRAUD ORDER – {reason and incident number}**.
8. Leave the incident open under your name **only** if you need to follow up on it and contact the caller, if not resolve it. Contact them once the sanction has been lifted from the account.

More Information

- Resolutions will intercept the order if possible. When the order is returned to the warehouse, the method of payment will be refunded.
- View the Hot Topic post [HERE](#) for additional information.

Internal Inventory Request (IIR)

IMPORTANT: Please add notes to the existing incident or open an incident under the incident type that the issue is regarding.

Comments: I have requested {the product} through IIR. Include why the item is requested.

Next Steps & More Information

- Email the Resolutions Department (ResDept@stampinup.com) the product name, item number, and quantity and they will get the product to you as soon as possible. It will need to be picked up at the distribution center.

Host Code

Incident type: Orders & Shipping > Host Codes

Description: Added {# of orders a host code was added} to Host Code {host code #}.

Order number: Order number that the host code was added to. **If there were more than one order, put the other order numbers in the comment section.**

Initiated by: Customer or Demonstrator (who requested it?)

Comment: Information that a request for the host code addition was made. Include order numbers and host codes if there are more than one.

****Leave the incident in OPEN under your name until the host code has been added by a gold agent. The gold agent will resolve the incident. ****

Next Steps & More Information

Silver Agents, please check the following:

1. That the host code workshop is still in “modify” status in OEX.

2. The order is an online customer order (OLO).
3. The order was placed **AFTER (date/time)** the host code was created.
4. That Stampin' Rewards were not redeemed in the order. Host codes **cannot** be added when rewards are redeemed in an order.

After you have checked the information, contact resource in the Host Code/Facebook Removals Chat to have the code(s) applied to the order(s). Include the incident number, order number(s) and the host code(s) in your request.

Gold Agents, once you receive a request to add host codes, follow these steps:

1. Verify all the criteria (workshop status, order type, date/time, Stampin' Rewards).
2. Add the host code in the bottom left corner of the order in score in the "Host Code" box.
3. Click "Apply" to save the code.
4. Check the order in OEX to make sure the host code was applied to the order (make sure to refresh the page).
5. Let the agent know that the code has been added.
6. Put notes in the incident that the code(s) have been added and resolve the incident.

Parts & Pieces

IMPORTANT: A Parts & Pieces incident is done when "parts" of a product are missing or damaged. Be sure to check the lists below to see what items are available for Parts & Pieces.

[Parts & Pieces List](#)

[Paper Pumpkin Parts & Pieces List](#)

Incident type: Orders & Shipping > Parts & Pieces

Description: Send {product that needs to be sent (include specific information such as what is listed on the parts and pieces lists)}

Order number: Original order number the item was on

Item number: The item number that has defective or missing parts or pieces

Initiated by: Customer or Demonstrator (who requested it?)

Comment: Brief note explaining why the part or piece is needed and include the following information in this format:

- Email
- Name
- Address
- Phone

****Leave the incident OPEN in your name****

Received Wrong Order

IMPORTANT: Verify if the caller is missing an order of their own. If they are, then place notes to replace the order and to issue a call tag for the wrong order received. If they are not missing their own order, then just do the incident for a call tag to be picked up.

Incident type: Orders & Shipping > Order Track/Replace

Description: UPS Track - Received Wrong Order

Order number: Original order number

Initiated by: Customer or Demonstrator (who requested it?)

Comment: Brief note explaining the situation including whether they need their order replaced (in case it went to the other address) and include the following information in this format:

- Email
- Name
- Address
- Phone

REMEMBER: You will also need to create a second incident for the person the ordered belonged to in that person's profile!

Incident type: Orders & Shipping > Order Track/Replace

Description: Someone Else Received Order

Order number: Original order number

Initiated by: Customer or Demonstrator (who requested it?)

Comment: Incident number for the previous incident. “Can you please contact this demonstrator to see what order they received?” (Resolutions will make the call). Also include the following information in this format:

- Email
- Name
- Address
- Phone

****Leave BOTH incidents in OPEN in your name****

Refund Order Request (and other refund types)

IMPORTANT: Exchanges need to be done for individual items. If the order has been canceled, the refund will be processed, and you do not need to do a refund incident too.

Incident type: Finance > Refund > Order (or choose type from drop down menu)

Description: {The type of refund}

Order number: If applicable

Item number: If applicable

Initiated by: Customer or Demonstrator (who requested it?)

Comment: Explain why they would like it refunded.

Next Steps & More Information

- Event refunds leave OPEN in Lana Limb's name
- DBWS refunds leave OPEN in Nina Christensen's name
- General orders & Paper Pumpkin refunds leave OPEN in your name
- Sales tax refunds leave OPEN in your name
- Shipping refunds leave OPEN in your name
- Backorder/Discontinued items refunds leave OPEN in your name

Resignation Process

IMPORTANT: Resignation requests must be sent via email and from the email address that is in the demo's profile. **Only gold and platinum agents can process the resignation.** Their email needs to include:

- “Resignation Request” as the subject line
- Their name and demo ID
- The date they would like the resignation to be finalized if applicable
- A brief description as to why they would like to resign.

Incident type: Demonstrator Relations > Resignation Request

Description: Resignation Request/Inquiry

Comment: Brief description of conversation or copy/paste the email from the demo and your reply.

RMA (US ONLY)

Incident type: Orders & Shipping > RMA

Order number: Correction Order Number

Description: Email RMA

Comment: Brief note explaining why the RMA is needed and include the following information in this format:

- Email
- Name
- Address
- Phone

****Leave the incident OPEN in your name****

Next Steps

1. Open a correction order from the original order number.
2. Include a return line for the item that is being returned. The correction needs to be done with a return line for an RMA to be sent and you must put the correction order number in the incident.
3. Include a send line if you are sending a replacement item.
4. Include the RMA incident number in the front notes of the correction order.
5. Put front notes in the original order number with correction order number.

More Information

- Resolutions will email the RMA form to the email address in the incident.

Starter Kit Issues/Process

IMPORTANT: This is for any issues or questions about the starter kit or starter kit process.

Click [HERE](#) to view the starter kit process.

Incident type: Demonstrator Relations > Starter Kit Issues

Description: {state the issue or question}

Order number: Starter Kit order number (if applicable)

Initiated by: Customer or Demonstrator (who requested it?)

Comment: Brief note explaining what the questions are/how the issue was resolved or what follow up is needed.

More Information

- Notify resolutions if there is an issue with a starter kit.
- If the demonstrator is contacting us because they were notified of a problem, please add notes to the existing incident instead of creating a new one and make sure to notify resolutions.
- If follow up is needed, leave the incident open in your name.

Status Exception

IMPORTANT: Status Exceptions will be processed by Gold Agents ONLY! But it is your job to make sure they qualify. Check [HERE](#) to see if the demo qualifies.

Incident type: Demonstrator Relations > Status Inquiry/Status Exception

Description: Status Exception Request Granted {what type of exception it is (\$15 Shortfall/Hardship/Shortfall)}

Comment: Explain why the exception was granted and the circumstances. Also, state if you have filled out the DS Request form for the exception.

****Leave the incident OPEN in your name****

More Information

- Make sure to fill out and submit a ticket by clicking [HERE](#). The form can also be found in SharePoint under DS Help Request > Business Support Request > Status Exception.

Quarter Sales Were Short	Pending Month	Status Exception Request/Sales Deadline
January-March	April	June 30 th
April-June	July	September 30 th
July-September	October	December 31 st
October-December	January	March 31 st

Unredeemed Stampin' Rewards

IMPORTANT: Unredeemed Stampin' Rewards can be sent out in a correction order. **DO NOT** create a coupon code for unredeemed Stampin' Rewards.

Incident type: Orders & Shipping > Stampin' Rewards

Description: Unredeemed Stampin' Rewards

Order number: Order number that the rewards were not redeemed in

Initiated By: Customer or Demonstrator (who requested it?)

Comment: Correction order number and a brief description including the amount of rewards earned and the amount of rewards sent in CO.

Next Steps & More Information

- After filling out the incident, place a correction order for the missing Stampin' Rewards. We **cannot** go over the amount of the SR, so they need to get as close to the total earned as possible.
- If a demonstrator calls to have the host code removed from a customer order that was over \$150, the workshop must still be open. Once the host code is removed, follow these steps:
 1. Put notes in the incident of the amount of the rewards and give the incident number to the demo.
 2. Have the demo find out what her customer wants for rewards and call us to place a correction order for the rewards. The demo may also tell the customer to call to redeem her SR order. **This MUST be done within 48 hours.**

Make sure to put notes in the correction order (incident #) and the original order (incident # and correction order #) that the Stampin' Rewards should have been redeemed in.

UPS Track Incident

A UPS track incident should be created when:

- An order is shipped and going to the wrong address.
- Tracking states that it was delivered but the recipient did not receive it.
- Tracking shows the order has not progressed in a timely manner (it is stuck).

IMPORTANT: If the order amount is under \$100, a correction order can be placed by the agent instead of this incident. Be sure to put notes in the correction and the original order.

Incident type: Orders & Shipping > Order Track/Replace

Description: UPS Track/Replace

Order number: Order number that needs to be tracked/replaced

Comment: Brief note explaining the issue and include the following information in this format:

- Email
- Name
- Address
- Phone

****Leave the incident in OPEN under your name****

More Information

- Resolutions will process a replacement order if needed.

Wrong Demonstrator on Customer Order (OLO)

IMPORTANT: There are a couple of reasons that we cannot change the demo on an order:

- If it is after the deferred income is processed (Monday night), we cannot change it.
Changes can only be made by end of day Monday for the previous week (Tuesday-Monday).
- If the order was placed in the previous month even if deferred income hasn't processed, the change cannot be made because the commissions have already been committed for demonstrators.
- If the VAT/GST is different for the demos, the change cannot take place because the taxes have been committed.

Incident type: Orders & Shipping

Description: Wrong Demo on Order

Order number: Number of the order the change is being requested for

Initiated by: Customer or Demonstrator (who requested it?)

Comments: Include the original demo ID and the intended demo ID and notes on why the change was requested. If it has been completed, please include this as well.

****Leave the incident in OPEN under your name until it is taken care of****

Process Before Changing a Demo ID

If you are talking to the customer:

- You must call the original demonstrator and let them know what has happened.

If you are talking to the demonstrator the order *should* have been placed under:

- You need to call the customer and the original demonstrator. The customer will need to verify which demonstrator they would like the order to be placed with.

If you are talking to the original demonstrator whose new team member accidentally placed the order under the team lead instead of themselves:

- We can make the change, but we should still at least talk to the new demonstrator since they are the customer.

Next Steps & More Information

- Calling the demo is the first option. Leave a message if no one answers. Give them an incident number and the option to chat or email us that they have received the message. If leaving a message is not an option, you can send an email.
- **Since the order is technically the customer's, we are not asking permission to change the order. Please be considerate and use the Demonstrator Support Vision Statement to handle situations where the demonstrator is upset with the situation.**

- Once you have gone through the process steps, **CALL RESOURCE** and they will make the changes. Do **NOT** put the request in chat. It will get lost. This is a timely matter so you will need to call the resource line.
- Make sure to create two incidents – one under the original demo and one under the changed demo. Remember to add the order number to both incidents.**

Please Remember: There are many ways this could happen. **DO NOT** suggest that this is a glitch in the system. You can make suggestions such as clearing cache & cookies or using an incognito window when they place their orders, but don't suggest there is a problem on our end.

Wrong Team Lead (Demonstrator) Selected in Join Process

Incident type: Demonstrator Relations > Starter Kit Issues

Description: Wrong Team Lead Selected in Join Process

Order number: Starter Kit order number

Initiated by: Demonstrator

Comment: A description of what happened and what changes need to be made. Also include what follow-up is needed and include the chat sent to resolutions.

****Leave the incident in OPEN under your name****

Next Steps

- Verify the information and which team lead the demo wants to have as their team leader.
- Contact the Resolutions department to see if this change can be made.

3. Call the team lead demonstrator and inform them of what is happening: "We are sorry, but a customer accidentally chose you as their team lead and we are going to correct the error for them."
4. Contact Resolutions again and let them know you have notified the original team lead of the change. Only resolutions can make the change to the team leader.

Note: The team lead will have received a congratulations email for getting a new team member and may call in before the new demo does.