

## Lowes's Appliances

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## Intro

CRST Home Solutions performs appliance delivery, installation, and haul away for customers who purchase their appliances at Lowe's. Lowe's will create the orders and CRST Home Solutions will reach out to the customer for scheduling, often via our IVR.

## Branding

"Thank you for calling CRST Home Solutions. This is (name). May I have the phone number associated with your order?"

"Thank you for calling/Working with CRST Home Solutions."

## Scope of Work

Starting on 5/11/21, the Scope of Work for Lowe's Appliances orders Haul Away will no longer be included in the standard Scope of Work for the majority of Lowe's SKUs. Instead, when a Lowe's customer requests haul away, the DOLI job will include the SKU 6499 – Haul Away Add-On.

Three services will still have SKU version that includes haul away as part of the standard scope of Work: Dishwasher, OTR Microwave, and Rangehood. For these three services, there will be both a no haul away and a haul way included SKU for each service. The haul away included version of these services.

- 6104 – Dishwasher
- 6052 – OTR Microwave Delivery, Install, and Haul Away
- 6108 – Rangehood w/ Haul Away

For all other Lowe's services, if there is not a haul away SKU on the order, the servicer is not expected to perform haul away of the existing appliance(s). If a servicer calls in because the customer requests haul away on an order with the haul away add-on SKU, we will follow the existing process of reaching out to IST for approval of the additional Work.

## PO Orders and WO Orders

**PO Orders:** PO numbers are Client Order IDs. These are sent directly from the client and imported into DOLI. There are two scenarios when PO's can be sent over to our DOLI system:

1. **New Order:** When the client first sends an order to us, it will come over as a PO. The order will have a DOLI job number and a Client Order ID.
2. **Replacement Order:** This new PO will replace the previous PO, but it will have the same DOLI job number and Client Order ID as the original PO (**Note:** Back Office will be sent an e-mail if there are any import process errors that need to be fixed manually).

**Work Orders:** These orders are **additional SKUs** that need to be added to the current PO Order. They often won't have their own DOLI job # and may share a Client Order ID with the original job because they will be a list of SKUs or services that have been approved by the client to be added to the original PO and to our DOLI job.

**Detail:** Lowe's will refer to Pre-measure services as Details. These orders are for the servicer to go onsite prior to the installation to confirm the size of the product and to quote any necessary alterations to the customer's site. This pre-measure will be recorded on the *Premeasurement Form* and uploaded to DOLI under Form Upload.. Once the form is in DOLI, it will be sent to Lowe's.

## Order Imports

New Lowe's orders are sent to DOLI as a PO or from Lowe's event management system, IMS. These orders should manually import (be created) in DOLI. There are times where the client will call for information or to request scheduling assistance. If the order is not in DOLI when you search by phone number, Client Order ID, or customer last name and zip code, follow the guideline below.

- Ask the Lowe's rep when the order was sent to us. If they aren't sure, ask them to re-send the order to [lowessupport@crst.com](mailto:lowessupport@crst.com)
- If the Lowe's rep is sure the order was sent correctly and they need an update, ask Back Office to confirm if CRST Home Solutions received the order.
- If an order has not automatically imported into DOLI **within 3 days of being received**, Back Office agents will manually create an order in DOLI and follow the normal processes for scheduling orders for Lowe's. We will still need to wait for the equipment availability e-mail from IST to schedule the order, so the status should be put into **"Unscheduled-Waiting ship notification."**
  - Phone 1 and Phone 2 agents may let the store or IST know that we will create the order and contact the customer shortly.

## Equipment on Orders

- We cannot schedule an installation order unless we receive the equipment availability notification from IST. Back Office will receive the e-mail from IST or an update in IMS, and the DOLI job status will updated to Unscheduled - Assigned.
- We should not contact the store regarding the equipment availability. Instead, we should wait for confirmation from IST.
- If CRST Home Solutions receives a scheduling call and the status is in "Unscheduled-Waiting ship notification," agents should apologize and inform the caller that we are not able to schedule the order at this time, as we are waiting for Lowe's to inform us the equipment is ready for our servicers to deliver.
- If the store or IST calls us and asks us why an order is not scheduled, apologize and ask if the equipment is available. If the store/IST tells us the equipment is available, we can schedule the order for the first available date. **You must notate the Lowe's store/IST rep who confirmed the equipment availability in your DOLI notes.**

## Lowe's IST Contact Information

The client has requested that we keep them informed of all issues that arise with Lowe's orders. For these situations, such as equipment issues or upsells, **RC should call Lowe's Installation Support Team (IST)**. Agents should explain the situation to the IST agent and then take action based on the directive of the IST agent.

Use the **Lowe's- IST Contact Information** page in WF to look up the correct contact number based on the selling store.

## Revisit SKU - 5192

SKU 5192 is known by the client as a Trip Charge SKU, and in our system, it will appear as a Revisit SKU. This SKU allows us to request additional pay from the client for issues where we must reroll site not ready, product issues, partial completes, etc.

For all instances where CRST Home Solutions service will need to make a return trip to complete the service, we should call Lowe's IST to request the Trip Charge/Revisit SKU. When you contact Lowe's to request a Trip Charge/Revisit SKU, be sure that you detail the reason why the SKU is being requested. Back Office will add the Revisit SKU to DOLI once we receive a WO for the SKU.

**The key factor with this SKU for this client is we must submit a Trip Charge/Revisit SKU request if the servicer is going to make a return visit, even if the servicer did not request the Trip Charge.**

## Long Wait Time Policy

Our long wait time policy applies to three scenarios:

1. Servicer reports a long wait time at the pickup location
2. We try to call IST and it takes 30 minutes or longer to get to an IST representative
3. The IST agent puts us on hold for 30 minutes or longer to review or Work on the order issue.

In any of these cases, agents should request a Trip Charge SKU from IST due to the long wait time. We will still request a Trip Charge/Revisit SKU for any issues requiring reroll, meaning you may request two Trip Charge/Revisit SKUs in this instance.

If the servicer requests an appearance fee, follow the normal appearance fee process. **However, agents should never mention to the servicer that we are requesting a Trip Charge SKU from the client.**

After calling IST, agents will need to open a Wait Time at Pickup Escalation for this situation.

## Non-Standard Client Processes

There are two highlights of our Lowe's processes that make how we handle onsite issue non-standard process: Neither CRST Home Solutions nor our servicers can sell anything (parts or services) to the customer; all onsite issues must be reported to Lowe's IST from onsite.

### No Dates Populating in DOLI

1. Advise the customer that we will need to reach out to field leadership for scheduling assistance and that we will call the customer back in the next 24 – 48 hours.
2. Use the **Lowe's MM Lookup** tab on the **Zip Code Lookup** tool to search by the **Selling Store**
  - If there is no Lowe's Market Manager, use the Zip Code Lookup tab to call the Regional Manager instead.

3. Call the local Lowe's Market Manager
  - If the Market Manager /Regional Manager does not answer, leave a voicemail and send a follow up email.
4. Schedule the order based on the Market Manager's instructions and call the customer back to confirm the schedule date and time.

#### Wrong/Damaged/Defective Product

1. Ask for a detailed description of what is wrong with the product
2. Advise the servicer to return all uninstalled equipment to the pickup location
3. Call IST to report the issue and request a Trip Charge / Revisit SKU
4. If the servicer requests an appearance fee, follow the standard appearance fee process
5. Update the status to **Waiting Client Action-No Equipment**.

#### Site not Ready

1. Ask the servicer for a detailed description of the issue that is preventing completion of services.
2. Advise the servicer to return all uninstalled equipment to the pickup location
3. Follow the standard appearance fee or trip charge processes
4. Call IST and request a Trip Charge / Revisit SKU
5. Update the status of the order to **Waiting Customer Action – Customer Request Delay**

#### Partial Completes

1. Ask for a detailed description of the issue and ask which SKUs were completed
2. Advise the servicer to return all uninstalled equipment to the pickup location
3. Call IST to report the issue and request a Trip Charge / Revisit SKU
4. If the servicer requests an appearance fee, follow the standard appearance fee process
5. **Update the status of each complete SKU to Complete**
6. **Update the job status to match the situation, e.g., Site Not Ready or Wrong/Damaged/Defective**

#### Troubleshoots / Re-Work / Re-Visit

When a customer calls in with a troubleshoot scenario, we will create a new order in DOLI with the 5192 – Revisit SKU on it. This order will be scheduled the same as we would schedule a troubleshoot order, with the original service company for 48 hours in the future, no Sundays nor Holidays. Once the customer's Revisit order is scheduled, RC must call IST to report the issue and request a WO for the revisit.

When the servicer rolls on a Lowe's Re-Work or "Troubleshoot" and calls into CRST Home Solutions to update the order due to the customer's issue being outside of the SOW, we may authorize the servicer to perform the additional labor up to \$210, without contacting IST. This translates with a Price-to-Lowe's cost of \$300. Any expenses that exceed this amount require a call to IST first. If they approve of the additional labor, we may continue with the Work. If IST does not approve of the additional labor, we will be unable to proceed with the customer's order and will have to direct the customer to contact their local Lowe's store for additional assistance.

#### Upsells / Missing SKUs, including Custom Labor

1. Ask the caller for a detailed explanation of what additional work is needed.
2. Ask if we are able to complete all services, including the additional services, today

3. Advise the caller that you need to reach out to IST to inform them of the situation.
4. Call IST and explain the additional work that is necessary, and for custom labor, the Price to Lowe's
5. Ask IST to approve the additional work. – **Ask for and notate the name of the IST agent.**
  - **Approved:**
    - i. Ask the IST rep to send over a Work Order (WO) for the additional work.
    - ii. If the whole order cannot be completed today, ask IST to also send over a Trip Charge/Revisit SKU
    - iii. Advise the servicer that the additional work is approved, and they may proceed with the work.
    - iv. If the servicer needs to reschedule the order, work with the customer and servicer to reschedule the order in DOLI. If any services are completed today, update the job per the Partial Complete process above.
  - **Not Approved:**
    - i. Ask IST to send over a Work Order for a Trip Charge/Revisit SKU.
    - ii. Advise the servicer that the work was denied and the order will be rescheduled.
    - iii. Advise the servicer to return all uninstalled equipment to the pickup location
    - iv. Ask the servicer to inform the customer that someone will be in contact with them.
    - v. If the servicer asks for Appearance Fee, add the fee per the Appearance Fee process.
    - vi. Recap and close the call with the servicer.
    - vii. Update the order status to "**Waiting Client Action-Problem with Order.**"
6. Notate the order accordingly.

For additional SKUs and Client Billable charges, IST will email the Back Office team or send us an update in IMS. Back Office will update the DOLI jobs appropriately once this information has been received.

**AGENTS SHOULD NEVER ADD ANY SKUS TO AN ORDER, EVEN IF IST GIVES VERBAL APPROVAL.**

### Custom Labor Calculator

A "Custom Labor Calculator" is available in the Trip Charge Info tab in DOLI for all Lowe's Appliances orders. This tool will only be used when a servicer is requesting that either Custom Labor (plumbing, cutting cabinets, etc.) or Parts be added to a Lowe's order. When a custom labor or parts are requested from one of our servicers, Resolution Care agents should use this calculator per the process listed below:

1. Ask the servicer for a detailed explanation regarding why the parts and labor are needed.
2. Ask the servicer if all services, including the additional Work can be completed today.
3. **Advise the servicer that we (servicer/CST H.S.) cannot sell directly to the customer.** Inform the servicer that you will reach out to Lowe's for resolution.
4. Ask the servicer how long in minutes it will take to complete the additional Work.
  - If he does not know how long it will take, ask him how much it will cost to complete the tasks.
5. Ask the servicer to hold while you call Lowe's.

Lowe's will want to know the amount Home Solutions are charging for the labor, so use the Custom Labor Calculator to determine that amount.

6. Click on **Trip Charge Info**
7. Scroll down to **Lowes Custom Work**
8. Enter the Service Company's serial number in the **A# field**.

Lowes Custom Work				
A#:	<input type="text"/>	Is this a pending installer?	<input type="checkbox"/>	
	<b>Minutes</b>	<b>Amount Requested by Servicer</b>	<b>Price to Lowes</b>	<b>Price to customer</b>
Labor Minutes	<input type="text"/>	-	-	-
Labor Cost		<input type="text"/>	-	-

9. Enter the time to complete the Work in **Labor Minutes** or the servicer's requested cost in **Labor Cost**
10. When you enter the amount, the trip charge tool will automatically calculate the billable amount as the "Price to Lowe's" and "Price to Customer." **Give Lowe's IST the "Price to Lowes."**

Lowes Custom Work				
A#:	<input type="text" value="505514"/>	Is this a pending installer?	<input type="checkbox"/>	
	<b>Minutes</b>	<b>Amount Requested by Servicer</b>	<b>Price to Lowes</b>	<b>Price to customer</b>
Labor Minutes	<input type="text" value="45"/>	37.14	53.06	81.63
Labor Cost		<input type="text"/>	-	-

Lowes Custom Work				
A#:	<input type="text" value="505514"/>	Is this a pending installer?	<input type="checkbox"/>	
	<b>Minutes</b>	<b>Amount Requested by Servicer</b>	<b>Price to Lowes</b>	<b>Price to customer</b>
Labor Minutes	<input type="text"/>	-	-	-
Labor Cost		<input type="text" value="80"/>	114.29	175.82

11. Call Lowe's IST and inform them of the necessary additional work. Only give the "Price to Lowes" as the cost of the labor/parts.
12. Did Lowe's approve the request?
  - **Yes:**
    - i. Advise the servicer that he can proceed with the installation because Lowe's approved of the Work to be completed.
  - **No:**
    - i. Ask IST for a Trip Charge/Revisit SKU – if we cannot complete the order today.
    - ii. Advise the servicer that the order will need to be rescheduled.
    - iii. Ask the servicer to inform the customer that he/she will need to talk to the client regarding the issue and the order will have to wait for installation.
    - iv. Update the order to "**Waiting Client Action - Problem with Order.**"
13. Notate the order accordingly and be sure to notate the reason why the parts were requested. **Do not notate the amount billable in the order notations.**

### **Important Reminder**

Lowe's must approve all custom labor/additional service requests. Any Work or parts outside of the scope of Work CANNOT be performed until we get approval from Lowe's. Servicers must call onsite before they perform additional Work. This is because IST may deny a request while we are onsite and expect the customer to pay the selling store directly.

## Cancelling Orders Requests

**When Agents are asked to cancel a Lowes order we must check to see if SKU 5192 on the job!**

- **If there is a 5192 SKU on the order**, the *installation services* will need to be cancelled at the line-item level (In edit multiple SKUs) and the 5192 will need to be completed. The job will then be Complete per SOW.
- **If there is not a SKU 5192 on the order**, then we can proceed with updating the job status to Cancelled.

## Exception Case – Waterline

Before scheduling an order with a Waterline installation service, we will need to read the Additional Instructions and/or notes to see if there is information about the kit. If no instruction has been provided, we will need to reach out to call IST to see where the kit is; it could be at the store or it could be in the customer's possession.

## Permits

For orders that require a permit, Lowe's will create a Permit order in IMS. This order will track the permit process from beginning to end and must be updated accordingly. We will need to have either the Permit or Permit Application with proof of payment submitted into IMS before the client will release the product.

1. After being imported into DOLI, these orders will be assigned to the service company. Back Office will place the order into “Prescheduled – Assigned” status in DOLI.
2. Servicers will upload a copy of the Permit or Permit Application with proof of payment in the form of either a check or receipt to DOLI and select “Certificate of Completion” as the document type.
3. Back Office will upload the permit documents and permit number into the IMS order.
4. Once the permit is uploaded, Resolution Care manually will update the job status to “Unscheduled – Waiting Ship Notification” in DOLI.
5. We will schedule the installation as per the existing process.

CRST Home Solutions must schedule the installation to the same service company that provided the permit. If the service company who acquired the permit is not able to perform the installation, we should reach out to the Market Manager.

**If a customer calls and the order is in “Prescheduled -Assigned’ status, Resolution Care will inform the customer that we will call them back to schedule when the product is available. If the Lowe’s store or IST calls, we will check Form Upload. As long as the permit or appliance with proof of payment is upload, we can schedule if the client says the product is available.**

### 3002 – Special Installation SKUs

Special Installation SKUs are used to cover labor, parts, or mileage quoted by the servicer during a pre-measure/detail for which we do not have a Lowe’s SKU. This SKU will stand as a placeholder for the additional work and Back Office will as a Client Billable trip charge for the amount listed on the Pre-measurement form. There is no need to reach out to Back Office or IST for these charges. They will added based on the PO that Lowe’s sends over.