

## Lowes's Appliances

Lowes's Appliances.....	1
Intro.....	2
Branding.....	2
Scope of Work.....	2
PO Orders and WO Orders.....	2
Order Imports.....	3
Customer Contact for Reschedules.....	3
Equipment on Orders.....	3
Lowes's IST Contact Information.....	4
Trip Charges/Revisits.....	4
Denied Charges.....	4
Long Wait Time Policy.....	4
Non-Standard Client Processes.....	5
Wrong / Defective / Damaged Product / Missing Parts.....	5
<del>Defective Discovered After Install</del> .....	5
Site not Ready.....	5
Partial Completes.....	5
Troubleshoots / Re-Work / Re-Visit.....	5
Custom Labor Calculator.....	6
Upsells/Missing SKUs, including Custom Labor.....	7
Cancelling Orders Requests.....	8
Permits.....	8
3002 - Special Installation SKUs.....	9
Servicer Request Mileage Trip Charge.....	9
Exception Case - Waterline.....	9

## 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/Jobs:** Stands for Purchase Order. [PO numbers are Client Order IDs](#). These represent a new purchase or a replacement purchase. These are imported from the IMS Jobs queue.

**Work Orders:** These orders are **additional SKUs** that need to be added to the current or revisits for in-warranty corrections or exchanges. WO are created as new orders with the Revisit SKU in DOLI. The reason for the WO will be notated in the Additional Instructions.

**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.

**PR:** Stands for Payment Request. These are authorizations from IST for additional funds on an order, most often to cover additional labor or as a \$50 Trip Charge for onsite non-completes.

## Order Imports

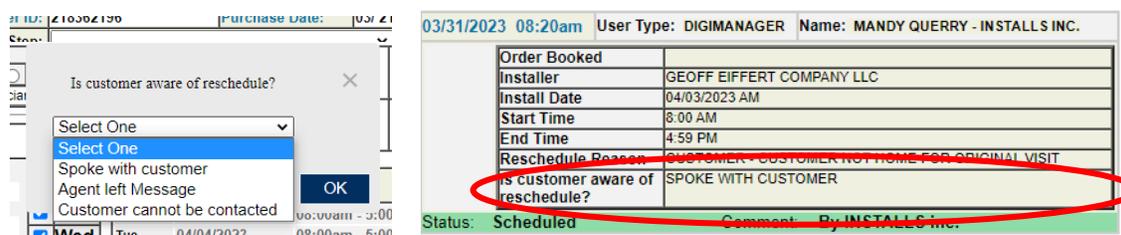
New Lowe's orders are sent to DOLI from Lowe's event management system, IMS. These orders should manually import (be created) in DOLI. There are times where the client will call for information or to request scheduling assistance. If the order is not in DOLI when you search by phone number, Client Order 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 from IST/IMS to schedule the order, so the status should be put into **"Unscheduled-Waiting ship notification."**
  - o Phone 1 and Phone 2 agents may let the store or IST know that we will create the order and contact the customer shortly.

## Customer Contact for Reschedules

It is a requirement that we make all Lowe's customer's aware of any changes to their appointments. For this reason, if you are not speaking to the Lowe's customer, are instead speaking to the servicer, Market Manager, or Lowe's representative, you will need to call the customer to confirm the appointment.

Lowe's orders have a dialog box that pops up anytime an order is being scheduled to capture whether or not the customer has been contacted.



1. The dialog box will ask: Is customer aware of reschedule?
2. Call the customer to confirm the appointment.
  - a. If the customer does not answer, leave a voicemail a with the new appointment date and time.
3. Choose the most accurate option from the drop down:
  - a. Spoke with Customer
  - b. Agent left message

## Equipment on Orders

- We cannot schedule an installation order unless we receive the equipment availability notification from IST. Back Office will receive 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.**

## Trip Charges/Revisits

Any time CRST is unable to complete the order on the day of the appointment due to an onsite exception (Site Not Ready, Equipment Issues, Upsells), Resolution Care must contact IST and request a \$50 Trip Charge to be added to the order. Agents will not add anything to the order in DOLI. Instead, agents will notate the PR # and whether the request was approved. If the servicer requests an Appearance Fee, Resolution Care will enter the fee per the standard process.

If the return visit is initiated by the customer/client, that Trip Charge is imported as a Revisit order in DOLI. Agents must check the Scope of Work for the purpose of the Revisit.

Resolution Care should not call IST and request a Trip Charge for customer not home situations.

## Denied Charges

Any time IST denies a request for additional funds on the order, either for a Trip Charge or custom labor/parts, Resolution Care agents should ask to speak to the MOD (Manager On Duty). If you are on hold for the MOD for more than 15 minutes then advise the Servicer to move on to the next job. The agent will continue to hold for the MOD to work on a resolution to the issue.

## 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 from IST due to the long wait time. We will still request a Trip Charge for any issues requiring reroll, meaning you may request two Trip Charges 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 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.

### Wrong / Defective / Damaged Product / Missing Parts

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 Customer Action-No Equipment**.

### ~~Defective Discovered After Install~~

- ~~1. Servicers install the product and discover it is defective afterward~~
- ~~2. The servicer will notify CRST of defective product~~
  - ~~a. Update the Complete step in the Mobile App to "Equipment Problem"~~
  - ~~b. Call/Chat into CRST from the customer's site.~~
- ~~3. The servicer will leave the defective product installed and onsite at the customer's home.~~
- ~~4. Resolution Care will update the job status to Completed - Wrong, Damaged, Defective~~
- ~~5. Resolution Care will reach out to IST and request that IST send over a new order for the exchange~~
- ~~6. The servicer is NOT eligible for an Appearance Fee as they will be paid on the completed order.~~

### 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 to report the issue and request a PR for a Trip Charge (PR number must be included in the DOLI notes)
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 PR for a Trip Charge (PR number must be included in the DOLI notes)
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. When creating the troubleshoot order, call IST and request a WO is created for the return visit. RC will request a

WO Number and put that into the Account Number in the New Order Creation form. 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.

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, the agent will contact IST to get the additional work approved. 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.

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. Click on **Trip Charge Info**
2. Scroll down to **Lowes Custom Work**
3. 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"/>	
PR#:	<input type="text"/>			
	<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"/>	-	-

4. Enter the time to complete the Work in **Labor Minutes** or the servicer's requested cost in **Labor Cost**
5. 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."**

Lowe's Custom Work				
A#:	<input type="text" value="501329"/>	Is this a pending installer?	<input type="checkbox"/>	
PR#:	<input type="text"/>			
	<b>Minutes</b>	<b>Amount Requested by Servicer</b>	<b>Price to Lowe's</b>	<b>Price to customer</b>
Labor Minutes	<input type="text" value="25"/>	20.63	26.82	36.21
Labor Cost		<input type="text"/>	-	-

Lowe's Custom Work				
A#:	<input type="text" value="501329"/>	Is this a pending installer?	<input type="checkbox"/>	
PR#:	<input type="text"/>			
	<b>Minutes</b>	<b>Amount Requested by Servicer</b>	<b>Price to Lowe's</b>	<b>Price to customer</b>
Labor Minutes	<input type="text"/>	-	-	-
Labor Cost		<input type="text" value="50"/>	65.00	87.75

## Upsells/Missing SKUs, including Custom Labor

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. **Determine what to request from Lowe's**
  - Check the Lowe's service to see if there is a SKU for the additional labor – request the SKU if available
  - If this is a non-SKUed service, use **Trip Charge Info > Lowe's Custom Work Calculator** to determine the **Price to Lowe's**
5. Ask the servicer to hold
  1. Call IST and explain the additional work that is necessary and request the SKU/Price to Lowe's
  2. Ask IST to approve the additional work.
  3. **Ask Lowe's IST for a PR # for the approved amount.**
  4. Did Lowe's approve the request?
    - **Yes:**
      - i. For custom labor, enter the PR number and **Save the trip charge.**
      - ii. **Do not add any SKUs to the order**
      - iii. Advise the servicer that he can proceed with the installation because Lowe's approved of the Work to be completed.
    - **No:**
      - i. Ask to be transferred to the MOD (Manager on duty)

- ii. If the RC agent is on hold for a MOD for more than 15 minutes:
    1. Let the servicer know to move on to the next job and the RC agent will continue to hold for the MOD to discuss how to take care of this order.
  - iii. Once the MOD answers, work with them to obtain a resolution to the issue.
  - iv. After a resolution is found and we are ready to reschedule the order, the Resolution Care agent will contact the customer to schedule the order.
    1. If the customer doesn't answer, then we will change the status to "Waiting Customer Action- Called Cust Left Message"
  - v. If the RC agent and the MOD are NOT able to resolve the issue, then we will change the status to "Waiting Client Action – Problem with Order" and inform the Customer of the next steps to resolve the issue.
5. Notate the order accordingly and be sure to notate the reason why the parts were requested. **Do not notate the Price to Lowes.**

### **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.

## 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.

## Servicer Request Mileage Trip Charge

6. Map the distance from the selling store to the customer’s location – Google Maps
7. Is there one SKU 6099 – Service Tracker for every mile over 20 miles from the selling store?
8. **Yes – One SKU for every mile over 20 miles**
  - a. Use Job Rates to determine if the servicer is being paid for SKU 6099
    1. Yes – Advise the servicer that they will be paid on 6099 for the mileage and no trip charge is necessary.
    2. No – Advise the servicer that we will enter a trip charge at our mileage rate and enter a Mileage Trip Charge for \$1.50 per mile over 20 miles from the store.
9. **Order doesn't have enough SKUs**
  - a. Advise the servicer that we will enter a trip charge at our mileage rate
  - b. Subtract the number of SKUs from the number of miles over 20, then multiply the difference by 2.5 – this is the price to Lowes
  - c. Call IST and ask for a PR number for that amount (missing miles x 2.5)
  - d. Check Job Rates to see if the service will be paid for the existing 6099 SKUs - If there is a Job Rate, only enter a Trip Charge for the miles not covered by SKU
  - e. Enter a Mileage Trip Charge for \$1.50 for every mile over 20 miles from the selling store
  - f. Include the PR number in the PR# field when entering the trip charge.
  - g. Notate in DOLI.
10. **No SKUs**
  - a. Advise the servicer that we will enter a trip charge at our mileage rate
  - b. Call IST and ask for a PR number for \$2.50 for every mile over 20 miles from the selling store
  - c. Enter a Mileage Trip Charge for \$1.50 for every mile over 20 miles from the selling store.
  - d. **Include the PR number in the PR# field when entering the trip charge.**
11. Notate in DOLI.

## 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.

