

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 NAL Group. This is (name). May I have the phone number associated with your order?"

"Thank you for calling/working with NAL Group"

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).

WO 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.

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@nalgroupp.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 be 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.**
- Pre-Measures/Assessments can be scheduled without a product update. They should not be moved to “waiting ship notification” status.

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: Customer not home, 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 SKU. When you contact Lowe's by e-mail to request this SKU addition, 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 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 a 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 SKU for any issues requiring roroll, meaning you may request two Trip Charge 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.

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
4. If the servicer requests an appearance fee, follow the standard appearance fee process
5. E-mail Lowe's with a description of the onsite issue. You must request a Trip Charge SKU for the order.
6. 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 then also e-mail Lowe's to inform them of the situation. You must request a Trip Charge SKU for the order.
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
4. If the servicer requests an appearance fee, follow the standard appearance fee process
5. Call IST about the issue.
6. **Update the status of each complete SKU to Complete**
7. **Update the job status to match the situation, e.g. Site Not Ready or Wrong/Damaged/Defective**
8. E-mail Lowe's with a description of the onsite issue. You must request a Trip Charge SKU for the order.

Servicer Request and Appearance Fee

Situations where a servicer may request an Appearance Fee should be covered under the onsite issues processes, but if an exception comes up, use the processes below:

1. Enter the Appearance Fee into DOLI per the standard process/requirements, e.g. the servicer is calling from onsite.
2. Call IST and then also e-mail Lowe's to inform them of the situation. You must request a Trip Charge SKU for the order.

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 or 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 reason as to why the SKU needs to be added.
2. After you get a detailed explanation from the caller, advise the caller that you need to reach out to IST to inform them of the situation.
3. Ask if we are able to complete all services, including the additional services, today
4. If you got verbal approval, **notate the name of the IST agent.**
 - **Yes:**
 - i. Ask the IST rep to send over the new SKUs. If the servicer will need to complete any work on a separate day, ask IST to also send over a Trip Charge SKU

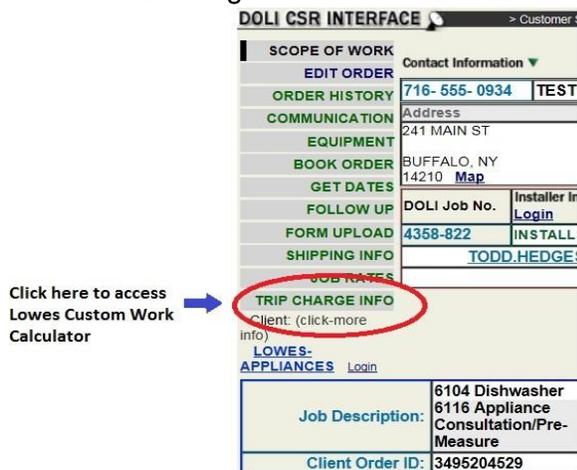
- ii. Advise the servicer that he can proceed with the installation because IST approved of the work to be completed.
 - iii. E-mail Lowe's IST explain why the caller is requesting SKUs to be added to the order. Please remember to include the **Client Order ID (Lowe's PO Number)** so that Lowe's are able to properly reference the job.
 - 1. Be sure to include the services that need to be added to the order in your e-mail.
 - iv. If the additional work is not being completed today, include a request for a Trip Charge SKU and update the job/SKU status to reflect the completed services.
- **No:**
 - i. Ask IST to send over a Trip Charge SKU
 - ii. Advise the servicer that the order will need to 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 him/her.
 - v. Recap and close the call with the servicer.
 - vi. Update the order status to **"Waiting Client Action-Problem with Order."**
5. 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:



The screenshot shows the DOLI CSR INTERFACE with a sidebar menu on the left. The 'TRIP CHARGE INFO' option is circled in red. A blue arrow points from the text 'Click here to access Lowes Custom Work Calculator' to this option. The main content area shows contact information for a customer named 'TEST' at '241 MAIN ST, BUFFALO, NY 14210'. Below this, there are fields for 'DOLI Job No.' (4358-822) and 'Installer' (TODD.HEDGE). At the bottom, a 'Job Description' field lists '6104 Dishwasher', '6116 Appliance', and 'Consultation/Pre-Measure', with a 'Client Order ID' of 3495204529.

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 he cannot sell the parts 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 Billable, so agents should enter a trip charge for the order while they are waiting in queue to contact Lowe's

6. Click on **Trip Charge Info**
7. Enter the Service Company's serial number in the **A# field**.

Enter New Trip Charge			
A#:	<input type="text"/>	Is this a pending installer?	<input type="checkbox"/>
Amount Requested:	<input type="text"/>		
Amount Billable:	<input type="text"/>		
Reason:	Please choose a reason <input type="button" value="v"/>		
Status:	Please choose a status <input type="button" value="v"/>		
Approved By:	<input type="text"/>		
<input type="button" value="Submit Trip Charge"/>			
Lowe's Custom Work			
A#:	<input type="text"/>	Is this a pending installer?	<input type="checkbox"/>
		Amount Requested	Amount Billable
	Minutes	Amount Requested by Servicer	Price to Lowes
Labor Minutes	<input type="text"/>	-	-
			<input type="button" value="Save"/>
Labor Cost		<input type="text"/>	-
			<input type="button" value="Save"/>

8. Enter the time to complete the work in **Labor Minutes** or the servicer's requested cost in **Labor Cost**
9. When you enter the amount, the trip charge tool will automatically calculate the billable amount as the **"Price to Lowes."** The Price to Lowes is the amount you will request from the client by phone.

Amount Billable should be e-mailed for the requested payment

Lowe's Custom Work			
A#:	<input type="text" value="108667"/>	Is this a pending installer?	<input type="checkbox"/>
		Amount Requested	Amount Billable
	Minutes	Amount Requested by Servicer	Price to Lowes
Labor Minutes	<input type="text" value="60"/>	49.52	70.74
			<input type="button" value="Save"/>
Labor Cost		<input type="text"/>	-
			<input type="button" value="Save"/>

Lowe's Custom Work			
A#:	<input type="text" value="108667"/>	Is this a pending installer?	<input type="checkbox"/>
		Amount Requested	Amount Billable
	Minutes	Amount Requested by Servicer	Price to Lowe's
Labor Minutes	<input type="text"/>	-	-
Labor Cost		<input type="text" value="100"/>	142.86
			<input type="button" value="Save"/>
			<input type="button" value="Save"/>

10. Call Lowe's to inform them of the situation and request approval for the servicer to perform the additional labor or provide the parts to the customer. Provide Lowe's the "Price to Lowe's" to complete the service. **DO NOT ADD ANY SKUs. We still need the approved WO e-mail from LOWE'S in order to add a SKU to an order when applicable.**
11. 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. Advise the servicer that the order will need to be rescheduled.
 - ii. 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.
 - iii. Update the order to "**Waiting Client Action - Problem with Order.**"
12. 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 Lowe's 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.