

LOWE'S WATER HEATERS ONSITE CHECKLIST

ONSITE CONSULTATION

- Perform full onsite consultation using the *Onsite Water Heater Consultation* form
- Upload the *Onsite Water Heater Consultation* form to Mobile App/DOLI

If you can perform the customer's installation the same day, proceed to the "On Arrival for Installation" Checklist

ON ARRIVAL FOR INSTALLATION

- Perform onsite walkthrough to confirm water heater fit
- Confirm if additional equipment or product will be needed
- Confirm if additional labor will be needed
- Call CRST and report the results of the premeasure
- CRST will contact the customer and walk the customer through:
 - Opening the estimate email and click the link for My Projects page
 - Signing the following on the My Projects page:
 - *Sales Contract*
 - *Notification of Right to Cancel*
 - Making payment on the My Projects
- Gather customer Pre-Installation Agreement signature on *Onsite Checklist* in Mobile App

AFTER INSTALLATION

- Review services with customer and perform a simple demonstration.
- Take photo of completed work and upload via Mobile App
- Pull up <http://ime.myhomeprojectcenter.com/documents>
- Enter Client Order ID and Customer Zip
- Use one of the following methods to gather the customer's signature on paperwork:
 - E-Sign All Required Documents – gather signature on your device
 - Text – send documents to number on file
 - Email – send documents to email address on file
- Advise the customer to sign the *Completion Certificate*
- Ask the customer to sign three (3) paper copies of the *Waiver of Right to Cancel*
- Leave two copies of the *Waiver of Right to Cancel* with the customer
- Take a photo of the *Waiver of Right to Cancel* and upload to the Mobile App/DOLI
- Gather final customer signature in the Mobile App
- Close the job in the Mobile App