

## When to add SKUs to an existing order

- CRST Home Solutions is sells services to the customer and taking a credit card payment
- A SKU was paid for, but is missing from the existing order
- The service is paid for, but the order has the wrong SKU.
- The client asks CRST Home Solutions to add to or change an order

There are often client-specific processes for selling to customers or correcting existing orders. **Always consult Workflow for the client-specific steps.**

## Who Pays

In DOLI, we must categorize each SKU added by who will be paying CRST Home Solutions for the service. There are three (3) options.

- Customer – CRST Home Solutions took a successful credit card payment form the customer.
- Client – The client is covering the cost and CRST Home Solutions is not charging the customer
- Installs – CRST Home Solutions is covering the cost of the SKU

## Edit Multiple SKUs

- Be sure to follow any client specific requirements **BEFORE** adding the SKU to the order in DOLI.
- If the customer is making a credit card payment for the service you are adding, you **MUST** process payment and confirm payment was successful **BEFORE** adding the SKU to the order in DOLI.

1. On the order in DOLI, click **Edit Order**.

The screenshot shows the DOLI CSR INTERFACE with the following details:

- Header:** DOLI CSR INTERFACE | Customer Service - LOGOUT | May 8, 2017 > 10:30 AM
- Navigation:** MGMT TOOLS | TECH LOCATOR | STOREFILE | GRADE-IT | NOTES GENERATOR | ROUTE MANAGER | REQUEST | TRACKER | LMS
- Order Summary:**
  - Phone: 147-852-3695
  - Client: KOMAL BOTE
  - Address: 1/11 TEST, MASON CITY, IA 50401
  - Email: komal@bestbuy.com
  - DOLI Job No.: 4359-188
  - Installer: TO DO LIST SERVICES, LLC
  - Serial No.: A 105169
  - Technician: SAM SCHREIBER
  - Phone: 800-833-8357
  - Website: MYLIST@TO-DO-LIST-SERVICES.COM
  - Tech Phone: 507-358-3246
- Buttons:** EDIT CONTACT INFO, PRINT, EDIT ORDER (highlighted in red), ENTER NEW ORDER, FIND
- Form Fields:** Select Client (BBUY APPLIANCES), Search Choice 1 (Phone), Search Choice 2 (DOLI Job Number)
- Footer:** Opening Client Search Utility.

2. Click **Edit Multiple SKUs**.

**DOLI CSR INTERFACE** > Customer Service - LOGOUT May 8, 2017 > 10:30 AM

SCOPE OF WORK: **Contact Information** EDIT CONTACT INFO PRINT

EDIT ORDER: 147- 852- 3695 KOMAL BOTE

ORDER HISTORY: Address: 1/11 TEST Other: -- Ait. Phone: --

COMMUNICATION: MASON CITY, IA 50401 Email: komal@bestbuy.com

EQUIPMENT: DOLI Job No. A 105169 < Serial No.

BOOK ORDER: 4359-188 TO DO LIST SERVICES, LLC SAM SCHREIBER

GET DATES: MYLIST@TO-DO-LIST-SERVICES.COM 800- 833- 8357

FORM UPLOAD: < Tech 507- 358- 3246 < Ait

SHIPPING INFO: TRIP CHARGE INFO

JOB RATES: Client: (click-more info) BBUY APPLIANCES

Job Description:	6400 OTR Microwave	Install Date:	04/ 27/ 2017 AM
Client Order ID:	18543687	Comp. Date:	n/a
Next Step:	[Dropdown]		
Current Status:	Scheduled / By INSTALLS inc.		

EDIT JOB SKU EDIT MULTIPLE SKUS CHANGE INSTALLER CHANGE STATUS

OPEN ESCALATION CLOSE ESCALATION JEOPARDY!

Current Status: Scheduled > By INSTALLS inc.

MGMT TOOLS | TECH LOCATOR | STOREFILE | GRADE-IT  
 NOTES GENERATOR | ROUTE MANAGER | REQUEST  
 TRACKER | LMS

Cancelled - Already Installed  
 >Select Region > Select filter >Select Job Type  
 >Select Clients

STATUS SEARCH

Select Client: BBUY APPLIANCES  
 Search Choice 1: Phone  
 Search Choice 2: DOLI Job Number

ENTER NEW ORDER FIND

<?xml version="1.0" >  
 Login to ARCHIVER  
 <?xml version="1.0" encoding="UTF-8"? >

Opening Client Search Utility.

3. Click **Add Upsell**.
4. From the **Who Pays** drop-down list, select the party that is responsible to pay for the additional service.

Add New Sku Add Upsell

Who Pays [Dropdown]

To select multiple SKUs, hold down ctrl and select the SKUs

- ( Service Call Skus )-
- 3000 --> Service Call
- 3700 --> Damage Claim
- 5162 --> HT/PC troubleshoot
- ( Installation Skus )-
- 5128 --> 5128 Basic TV Setup Add-on
- 5145 --> 5145 AC Outlet Installation (PowerBridge) Add-on
- 5149 --> 5149 Home Theater Install - Premium Add-on
- 5153 --> 5153 Speakers - 1 - 2 Add-on
- 5159 --> 5159 Basic Learning Remote Programming Add-on
- 5360 --> 5360 TV Recycling Add-On
- 5197 --> 5197 Wall-Mount add-on

Submit Sku Addition

- a. If you selected **Customer** from the **Who Pays** drop-down, perform the following steps:
  - i. Calculate SKU costs and any applicable taxes. Then, quote the price to the customer.
  - ii. Fill out the Payline Invoice and send the invoice to the customer
  - iii. When the customer states that they submitted payment, check for paid invoices in Payline to verify that payment has been received successfully.
  - iv. From the drop-down list of SKUs, select the SKU(s) you need to add to the order.
  - v. Click **Submit SKU Addition**.
  - vi. Notate accordingly, be sure to include the **INVOICE** or **TRANSACTION ID** in your notes.
- b. If you selected **Client** from the **Who Pays** drop-down list, perform the following steps:
  - i. From the **Client Pay Reason** drop-down list, select the appropriate reason the Client is responsible to pay.

- **Missing SKU:** A service that the customer paid for is missing from the order.
  - **Incorrect Service Sold at Store:** The services sold do not match the customer's needs or the products on the order. An example would be if the customer was sold a smart doorbell installation, but they really needed their wireless security cameras setup.
  - **Customer Expectations on Service:** The customer expects the additional work to be included, usually based on incorrect expectations set at the sale.
  - **Customer Wants Additional Service and Will Not Pay:** The customer understands the service is not included in the purchased services, but the customer refuses to pay for the additional work.
- ii. From the drop-down list of SKUs, select the SKU you need to add to the order.
  - iii. Click **Submit SKU Addition**.

## Adding SKUs to Completed Jobs

Our agents (across every level and every department) cannot add SKUs into an order that is already in **Completed status** without supervisor approval. The supervisor's name needs to be included in the notation if this happened.

## Best Buy: Make-It-Right

Best Buy uses the **Make-It-Right** button, rather than **Edit Multiple SKUs** to add services to DOLI jobs.

We are able to sell SKUs to the customer prior to the date of service. If the customer is unwilling to pay before the servicer is onsite, we may refer the customer back to the store or allow the servicer to access the cost while onsite.

On the day of the appointment, the servicer may call in sales from onsite. If the customer is unwilling to pay, especially due to wrong expectations, CRST Home Solutions may call Geek Squad DoD to get approval for the client to pay for the services. We will cover more about this in Phone 2 training.