

Direct Sales FAQ

What Are Direct Sales SKUs?

Direct Sales SKUs are SKUs that CRST Home Solutions sells directly to certain customers. These SKUS use our own pricing and scope of work. There are three situations in which agents will perform a direct sale.

- Clients that have their own service offering on the Master Client SKU List, but refer the customer to CRST Home Solutions for payment and order creation (e.g. Sunsetter)
- Customers who have not purchased from any of our clients but would like to purchase installation services directly from CRST Home Solutions.
- If a client uses Direct Sales SKUs for their upsell opportunities.

Where Can I Find the SKU information for Direct Sales orders?

For pricing and other SKU information, consult the Master Client SKU List for the CRST Home Solutions Direct Sales list. Pricing information may also be found in the New Order Entry Form.

How will customers pay for Direct Sales orders?

CRST Home Solutions agents will sell these over-the-phone and use a Payline invoice to process payment.

What is the Process for these Sales?

- Use the Direct Sales SKU list to quote the customer the service that he/she requires
- Determine if the service is being performed in a taxable state, and if necessary, calculate taxes using Zip2Tax
- Process payment in Payline **(Always confirm the payment is successful before adding the SKUs or scheduling in DOLI)**
 - If payment hasn't been confirmed as successful, notate the amount owed for the next agent.
- If this is a new order, create New Order in DOLI with Installs as the Client. The campaign will be determined by the program/client.
 - If this is an existing order, add the SKU to the order as Customer Pays.
- Schedule the order in DOLI
- Notate the order in the Communications tab in DOLI, include the transaction number or Invoice ID.