

Sam's Club Transfers from SquareTrade

SquareTrade, who provides the extended warranty bundles for Sam's Club, uses CRST Home Solutions' Sam's Club portal to enter and schedule new SquareTrade orders for Sam's Club members. The SquareTrade call center creates the majority of new Sam's Club SquareTrade orders that do not require a charge to the member's credit card.

SquareTrade does not have access to process credit cards in the portal. Instead, SquareTrade transfers calls to NALG if:

- The portal notifies SquareTrade that the Sam's Club member must pay a distance charge on their Sam's Club SquareTrade order.
- The Sam's Club member wants to add other SKUs/services (e.g., powerbridge or soundbar) to their SquareTrade order.
- SquareTrade is unable to complete the order creation and/or scheduling in the Web Portal.

Calls transferred from SquareTrade come into our regular Sam's Club split.

SquareTrade Transfers a member for Distance Charges / Unable to Schedule

When SquareTrade attempts to create a member's order in the portal, but member lives outside of the standard delivery area, the portal will show SquareTrade a message directing them to contact us. This the same message we see in our portal. When this happens, SquareTrade will transfer the member to NALG for payment processing and scheduling.

When SquareTrade transfers Sam's Club member phone calls to NALG to process credit card payments for distance charges, we will:

1. Ask the member if they purchased their SquareTrade Bundle in a Sam's Club store or online.
Note: Most will be in-club purchases that require the service provider to perform pick-up and delivery.
2. Search for the member's order by phone number in DOLI.
3. If there is an order in DOLI:
 - a. Calculate the distance charges and process payment via a Payline invoice. Then, schedule the order in DOLI.
4. If there is no order in DOLI.
 - a. If the member purchased in-club, create a SquareTrade order in the portal according to normal procedures. You may need to process the distance charge via Payline invoice.
 - b. If the member purchased online, follow the normal procedure to create a SquareTrade Online order in DOLI, charge the member's credit card via Payline invoice, and schedule the order in DOLI.

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Important: This process may also be used when there are no dates available in the portal for SquareTrade to schedule the order.

SquareTrade Transfers a member for an Upsell:

SquareTrade Bundles include delivery and setup/mounting services. If a member requires additional services, such as a PowerBridge or a Soundbar Mounting, those are sold through CRST Home Solutions and added to their SquareTrade order. When SquareTrade transfers Sam's Club the member to NALG to process credit card payments for adding a service (e.g., on wall), perform the following steps:

1. Ask the member for their phone number.
2. Search by the member's phone number in DOLI to see if there is an existing job for the member for the Sam's Club SquareTrade Bundle.
 - a. If SquareTrade already created the order in the portal, there will be a job in DOLI. Check for distance charges and then charge the member's credit card in Payline for the upsell service, and then add the new SKU to the job in DOLI.
 - b. If SquareTrade did not create an order in the portal, perform the following steps:
 - i. Ask the member if they purchased their SquareTrade Bundle in a Sam's Club store or online.
 1. If the member purchased in-club, follow the normal procedure to create a SquareTrade order in the portal. Once the order is created, charge the member's credit card in Payline for the upsell service and any distance charges, and then add the new SKU to the job in DOLI.
 2. If member purchased online, follow the normal procedure to create a SquareTrade order in DOLI, charge the member's credit card in PayLine for the upsell service and any distance charges, and then add the new SKU to the job in DOLI.

Sam's Club or the Member Calls to Schedule a NEW SquareTrade Installation

When a Sam's Club associate or member calls NALG stating that they need to create a Sam's Club SquareTrade order, we will transfer the call in SquareTrade.