



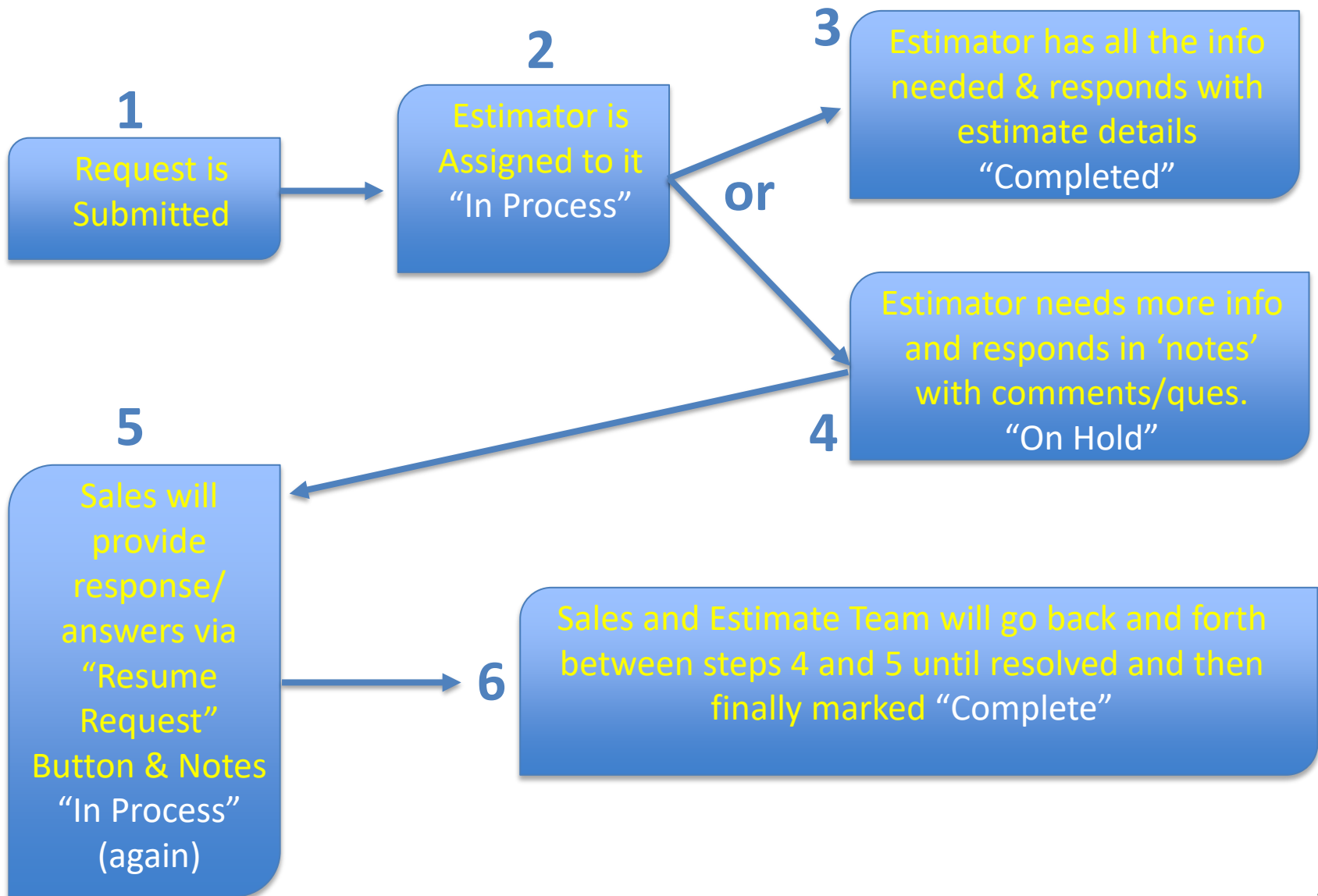
nth degree

Estimate Requests OASIS Training Guide for the Estimate Team

Objectives

- Keep all correspondence in OASIS
 - No more back-and-forth emailing
- Transparency on details needed for a request & increased efficiency in collecting it.
- Clear visibility of the progress/stage of the request
 - Email alerts when stage changes
- Easy to re-open or re-visit prior requests.
- Reportability / KPI's
- Utilize a new dashboard for efficiency in following the workflow of your requests

Workflow of an Estimate Request



Dashboard

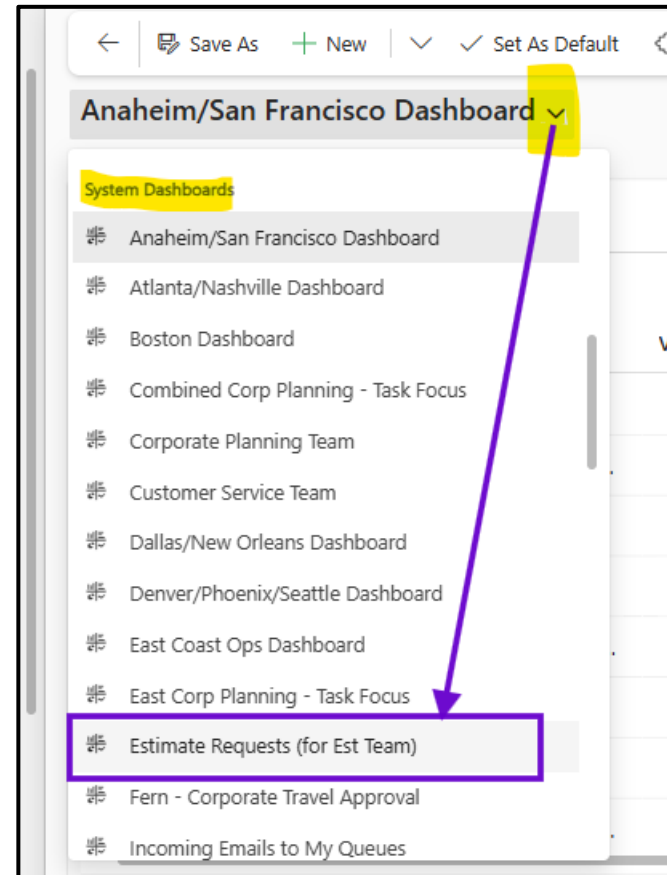
Dashboard Name:

Estimate Requests (for Est Team)

- Found under the System View list
- Click the dropdown and scroll, then click to select

Purpose –

Designed to flow through all requests from beginning to end, and identify when action is needed from you, versus what you are waiting on from the sales team.



Dashboard

My Sales Team's Estimate Requests

- Explanations of each quadrant
- Note that each quadrant can be expanded (to see more details) by clicking the ellipses (3 dots) in the upper right corner of each quadrant

Estimate Request Inbox

This box shows all requests waiting to be picked up by someone on the estimate team. When you assign a request to yourself, it leaves this box and moves to the 'My Estimate Requests' box to the right.

Date Requested...	Topic	Short Name	Exhibitor	Requested By (Estimate Assis...
5/7/2026 4:11 PM	O-268293	Test Suyati Sh...	Test Suyati Account	Jennifer Wagener

My Estimate Requests

This box shows all requests that need action from you. This includes newly picked up requests AND requests that have been put On Hold but now returned back to you.

We didn't find anything to show here

Estimate Assistance In Process

This box shows **all requests** waiting to be finalized by the estimate team – this includes dates and time length of processing. This is also where teammates can see each other's requests and jump in to assist by finding the request here.

Dashboard

Estimate Requests (for Est Team) – cont'd

- All completed requests are listed at the very bottom of the dashboard

The screenshot shows a dashboard titled "Estimate Requests (for Est Team)". At the top, a message says "We didn't find anything to show here". Below this, there are two main sections:

- Estimate Assistance On Hold:** This section is currently empty, displaying a message "We didn't find anything to show here". A red arrow points to this section with the text: "This box shows all requests that are awaiting responses from sales."
- Completed Estimate Assistance Requests:** This section contains a table of completed requests. A red arrow points to this section with the text: "This box shows all requests that have been completed and will drop off the list once they are converted to a work order. (Won)".

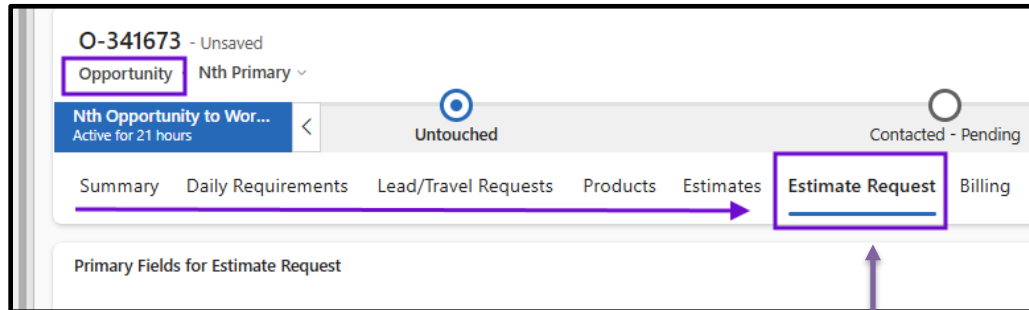
The table in the "Completed Estimate Assistance Requests" section has the following columns: Date Requested, Opportunity, Short Na..., Exhibitor (Oppo..., Requested ..., and Sales Team (O... .

<input type="checkbox"/>	Date Requested	Opportunity	Short Na...	Exhibitor (Oppo...	Requested ...	Sales Team (O...
<input type="checkbox"/>	5/5/2026 4:13 PM	O-341697	NADA Show	Assurant	Megan Mic...	Greenway-Mich...
<input type="checkbox"/>	5/6/2026 11:05 AM	O-268293	Test Suyati ...	Test Suyati Account	Jennifer Wa...	Test Suyati Sale...
<input type="checkbox"/>	4/29/2026 5:20 PM	O-300150	AIA Conf	Ykk	Megan Mic...	Greenway-Mich...
<input type="checkbox"/>	4/28/2026 3:03 PM	O-340364	test	Graco	Megan Mic...	Greenway-Mich...
<input type="checkbox"/>	4/28/2026 2:57 PM	O-340354	test	Mimaki	Megan Mic...	Greenway-Mich...
<input type="checkbox"/>	4/28/2026 8:19 AM	O-339256	test	TDK	Mark Sassack	Zimmerman-Sh...
<input type="checkbox"/>	4/27/2026 12:50 ...	O-339137	NPTC Annu...	Connixt	Jaedyn Traut	Traut
<input type="checkbox"/>	4/28/2026 8:05 AM	O-339133	test	TDK	Mark Sassack	Zimmerman-Sh...

Receiving an Estimate Request

1. Sales initiates a request for estimate assistance

- In the Opportunity record, a separate tab is listed - “Estimate Request”
- All information your team needs is presented here, including Attach2Dynamics (A2D) for renderings and other helpful documents.
- An email notification will be sent to Estimates@nthdegree.com the moment a request is created. It will contain the Opportunity # via a hyperlink for easy connection to OASIS.



2. Assign yourself to a request – two options

- Upon entering OASIS and your dashboard “Estimate Requests (for Est Team) “, the top left box will list all unassigned requests – click into one here via O# hyperlink.
- From the email notification, click directly into an O# hyperlink that you choose to act on.

3. From the Opportunity record, click the Estimate Request tab.

4. Select your name from the field “Primary Person Responsible” (tip: type the 1st few letters of your name) --see below image

Receiving an Estimate Request

O-268293 - Saved
Opportunity · Nth Primary

Test Suyati Account Exhibitor

Nth Opportunity to Work...
Active for 16 months

Untouched Contacted - Pending Estimated

Summary Daily Requirements Lead/Travel Requests Products Estimates **Estimate Request** Billing Shipping Notes-Activities Client Retention Additional Contacts Selling Co

Primary Fields for Estimate Request

Show	Test Suyati Show 2025	Exhibitor	Test Suyati Account
Source Customer	Test Suyati Account	Venue	Test Suyati Venue
Booth Square Feet	100	Audio/Visual I&D	Nth
Booth Type	Double Deck	Sales Team	Test Suyati Salesteam
Booth System	test	Estimate Type	Estimate
Graphics Type	SEG	Flooring	Nth Degree Provided
Install Start	4/20/2026	Flooring Type	N/A
	8:00 AM	Base Plates under Flooring?	No
Dismantle Start	4/27/2026		
	8:00 AM		
Documents in A2D	No		

Current Estimate Request

Status Reason: Requested

Requested By: Jennifer Wagoner

Primary Person Responsible: matt

Collaborators

Select all

Users

Matt Wilcox
MWilcox@nthdegree.com

No data available

You can also add names of additional collaborators, if needed

See blue box above

Reviewing Estimate Requests

1. Review the details in the top left quadrant of Estimate Request tab (“Primary Fields for Estimate Request”)

- a. Each of these fields must be populated before a request can be submitted.
- b. NOTE: some may read as ‘unknown’ and are subject to change, depending on the situation.
- c. The last data field will indicate if any renderings or other documents have been added to the Attach2Dynamics /SharePoint link

O-268293 - Saved
Opportunity · Nth Primary

Nth Opportunity to Wor...
Active for 16 months

Untouched

Contacted - Pending

Summary Daily Requirements Lead/Travel Requests Products Estimates **Estimate Request** Billing Shipping Notes

Primary Fields for Estimate Request

Show	Test Suyati Show 2025	Exhibitor	Test Suyati Account
Source Customer	Test Suyati Account	Venue	Test Suyati Venue
Booth Square Feet	100	Audio/Visual I&D	Nth
Booth Type	Double Deck	Sales Team	Test Suyati Salesteam
Booth System	test	Estimate Type	Estimate
Graphics Type	SEG	Flooring	Nth Degree Provided
Install Start	4/20/2026	Flooring Type	Carpet & Pad
	8:00 AM	Cut On-Site	---
Dismantle Start	4/27/2026	Raised Floor	---
	8:00 AM	Base Plates under Flooring?	No
Documents in A2D	No		

Reviewing Estimate Requests

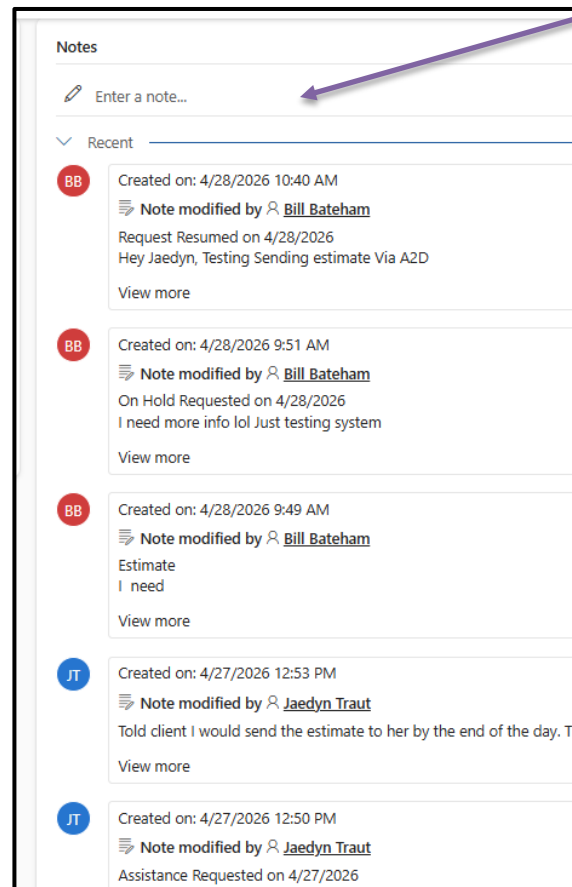
2. Review the details in the lower left quadrant of Estimate Request tab (“Secondary Fields for Estimate Request”)
 - a. These are not required, but often important for larger jobs.

The screenshot displays a software interface for reviewing estimate requests. At the top, the opportunity ID is 'O-268293 - Saved'. Below this, the 'Opportunity' is identified as 'Nth Primary'. The main navigation bar shows 'Nth Opportunity to Wor...' (Active for 16 months) and two status indicators: 'Untouched' and 'Contacted - Pending'. The 'Estimate Request' tab is selected and highlighted with a purple box. The interface is divided into several sections:

- Summary Section:** Contains fields for 'Dismantle Start' (4/27/2026), 'Raised Floor' (---), '8:00 AM', 'Base Plates under Flooring?' (No), and 'Documents in A2D' (No).
- Secondary Fields for Estimate Request Section:** This section is highlighted with a purple box and contains several dropdown menus:
 - Hanging Sign(s): No
 - Electrical Supervision: ---
 - Electrical Channeling: ---
 - Show Duty: ---
 - Shop Supervision: ---
 - Exhibit Structure: ---
 - Exhibit Structure Previously Set by Nth: ---
 - Inbound Freight Supervision: ---
 - Outbound Freight Supervision: ---

Reviewing Estimate Requests

3. **Review Notes** (located in the far-right quadrant of Estimate Request tab)
 - a. ALL conversations should reside here.
 - b. The initial submission request note will be automatically recorded here.
 - c. Comments, questions, or actual estimate data responses should all be typed here.

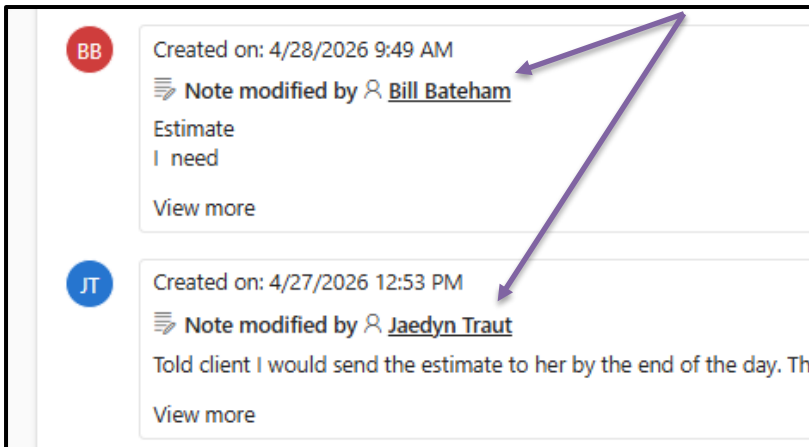


Reviewing Estimate Requests

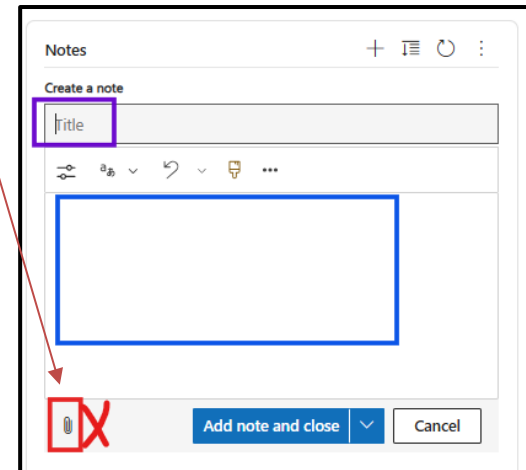
4. Respond to the Request

a. Add Notes (comments or questions for the sales team)

- i. **Utilize the Title** – see purple box below
(sugg typing it in CAPS) for easier distinction of note subject when searching back for reference
- ii. **Body of the note** – see blue box below
This can be as lengthy of a note as needed. It will be date and time stamped + include the user (note writer's) name.
 - Ask questions if needed, or simply provide details of the estimate here.
(sugg typing ESTIMATE 1.0 in CAPS in the note title – and then 2.0 on revisions)



iii. **NEVER USE**
the paper clip
to attach files.
Only use A2D.



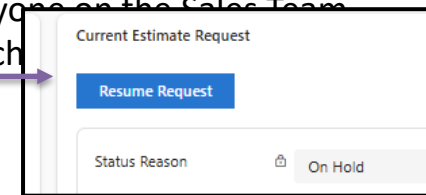
b. Add Attachments (if needed)

- i. **If an Excel estimate is required** – use Attach2Dynamics then be sure to include a note, as instructed above, indicating that is where the estimate is.

Notifications

Email notifications are sent when an estimate request changes status:

- **Estimate Request is initiated**: email alert with link to the O# is sent to Estimates@nthdegree.com
 - ✓ Action will be pending from the estimate team
 - Found in the upper left quad of Estimate Requests (for Est Team) Dashboard **AND** My Sales Team's Estimate Requests Dashboard.
 - ALL requests 'in process' (not just yours) are listed in both dashboards in the 2nd row. This is where you can pick up & assist with your teammate's requests if needed.
- **Status changed to On Hold**: email alert with link to the O# is sent to everyone on the Sales Team. If the estimate team needs additional info from the sales team, they will change the status to On Hold.
 - ✓ Action will be pending from the sales team
Click the 'Resume Request' button to write back to the Est. Team
 - Found in the lower left quad of Estimate Requests (for Est Team) Dashboard.
 - Found in the upper right quad of My Sales Team's Estimate Requests Dashboard.
- **Status changed to In Process**: email alert, as described above, is resent to the estimate team.
 - ✓ Action will be pending from the estimate team
 - See first bullet for same locations in dashboards
- **Status changed to Complete**: email alert, as described above, is resent to everyone on the Sales Team.
 - ✓ All actions are finished & found in the lower right quadrant of the Estimate Requests (for Est Team) Dashboard and the bottom row of the My Sales Team's Estimate Requests Dashboard.



Completed Requests – What's Next?

Completed Requests – as shown in the bottom list of your dashboard

- These will remain in this list
 - until the sales team converts the opportunity into a work order and
 - the bid is WON.
- If a revision is initiated by the customer, and the sales team reaches out to you again, they will create a brand new request and the process starts over. HOWEVER, you are able to reference the previous request(s) below the new request details.

The screenshot displays a software interface with a top navigation bar containing 'Estimate Request', 'Billing', 'Shipping', 'Notes-Activities', 'Client Retention', 'Additional Contacts', 'Selling Conditions (Base City)', and 'LinkedIn Sales Navigator'. On the left, there is a sidebar with filters for 'Test Suyati Account', 'Test Suyati Venue', 'Nth', 'Test Suyati Salesteam', 'Estimate', 'Nth Degree Provided', 'N/A', and 'No'. The main content area is divided into two sections: 'Current Estimate Request' and 'Completed Estimate Requests'. The 'Current Estimate Request' section has a 'Request Assistance' button and the text 'Source record not selected'. The 'Completed Estimate Requests' section features a table with columns for 'Status Rea...', 'Primary Person Respon...', 'Date Req...', 'Date In Proc...', 'Date Comple...', and 'Total Time On I'. A single row is visible with the status 'Completed', a user profile for 'Matt Wilcox', and dates '4/27/2026 8:2...', '4/27/2026 8:2...', and '4/27/2026 8:39...'. A purple arrow points from the 'Request Assistance' button to the 'Completed Estimate Requests' table.

- Once the customer approves their estimate & the Opportunity is converted to a Work Order, the record is no longer visible on the 'Completed' view of the dashboard. This marks the end of the process!