



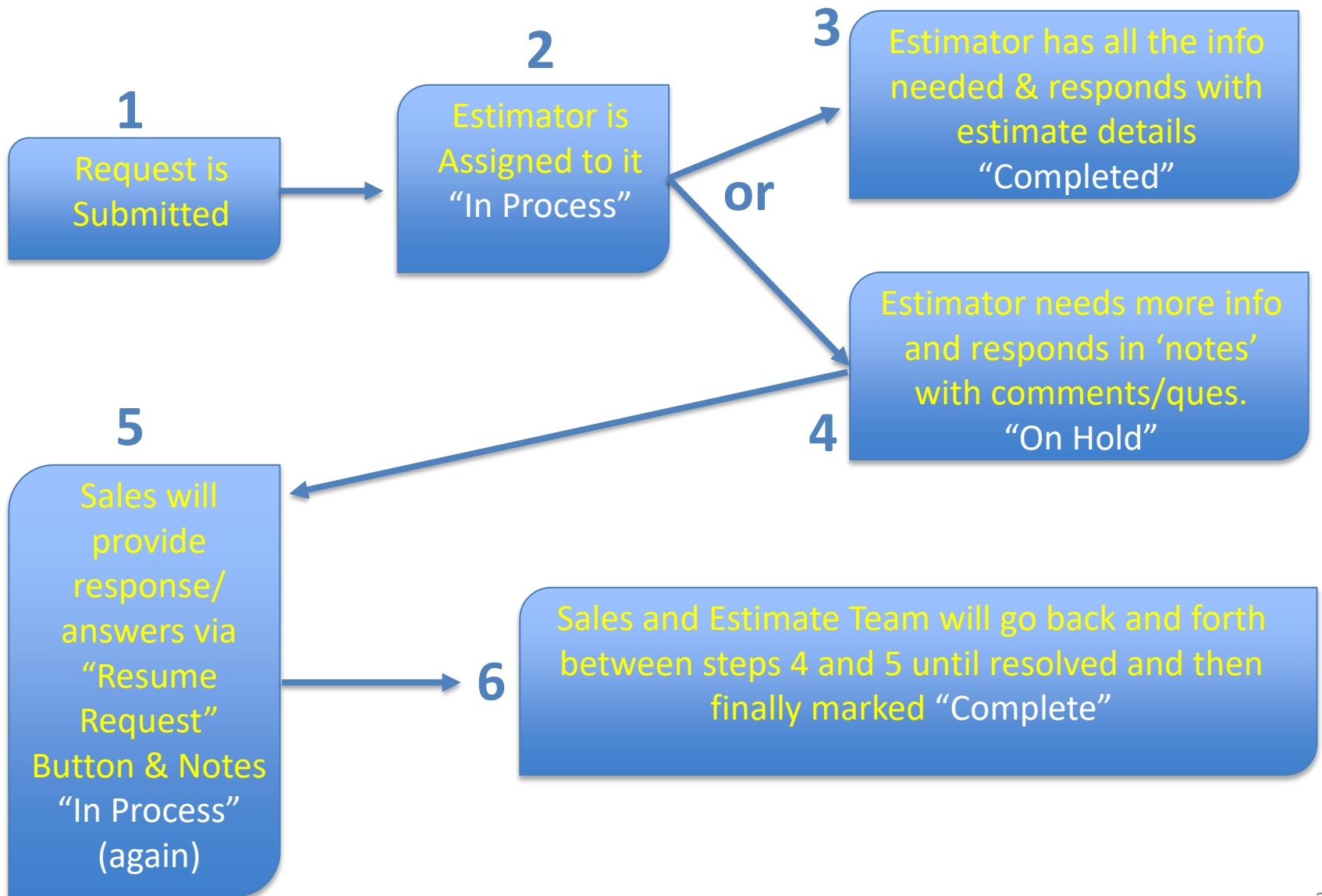
nth degree

Estimate Requests OASIS Training Guide for Sales

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

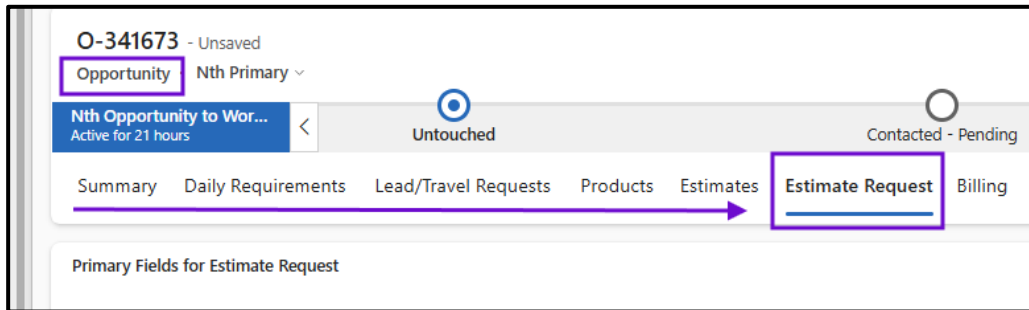


Creating an Estimate Request

1. Open (or create) the Opportunity Record

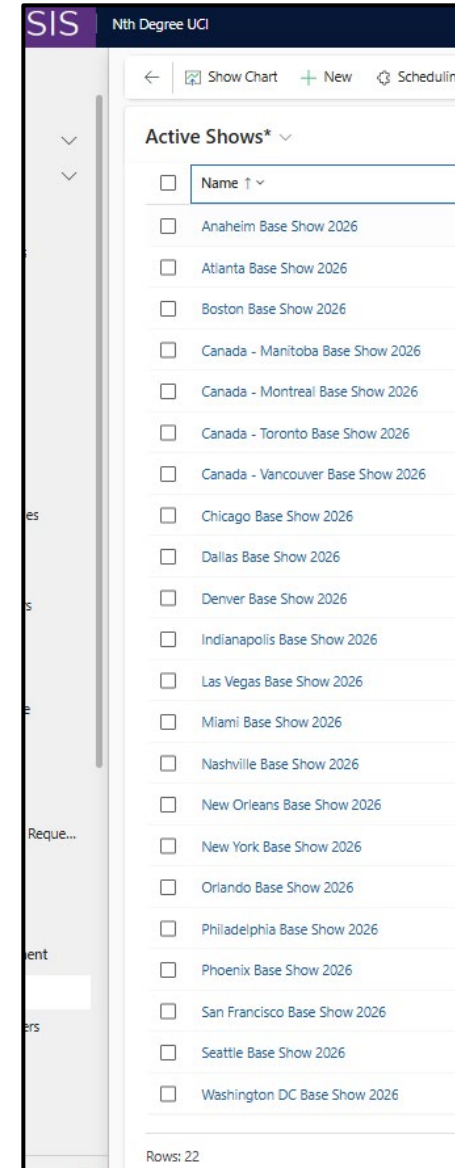
- If the show is not yet in OASIS, please use the appropriate “City Name Base Show” (suggest searching “ *base show* “ for the isolated list)
- Enter in as much info as you have on the summary page of the Opportunity – details for request will transfer from here automatically.

2. Select the Estimate Request Tab



3. Fill out all empty fields in the “Primary Fields for Estimate Request”

- These are required to request assistance (a reminder pop-up box will display what is missing)
- Half of them are auto-filled from the show record or opportunity summary page.
- Secondary Fields are not required but encouraged to be filled out if any apply. (see image on next page)



Creating an Estimate Request

“Primary Fields for Estimate Request”

O-341673 - Unsaved
Opportunity · Nth Primary ▾

Nth Opportunity to Wor...
Active for 71 hours

Untouched Contacted - Pending

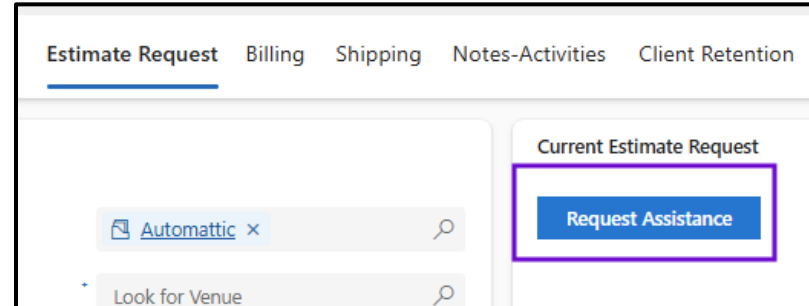
Summary Daily Requirements Lead/Travel Requests Products Estimates **Estimate Request** Billing Shipping Notes

Primary Fields for Estimate Request

Show	WordCamp 2026 ×	Exhibitor	Automatic ×
Source Customer	Pinnacle Exhibits** ×	Venue	---
Booth Square Feet		Audio/Visual I&D	---
Booth Type	---	Sales Team	Rudel-McRory ×
Booth System	---	Estimate Type	Estimate
Graphics Type	---	Flooring	---
Install Start	M/d/yyyy	Flooring Type	---
Dismantle Start	M/d/yyyy	Base Plates under Flooring?	---
Documents in A2D	---		

Creating an Estimate Request

4. Click the 'Request Assistance Button'

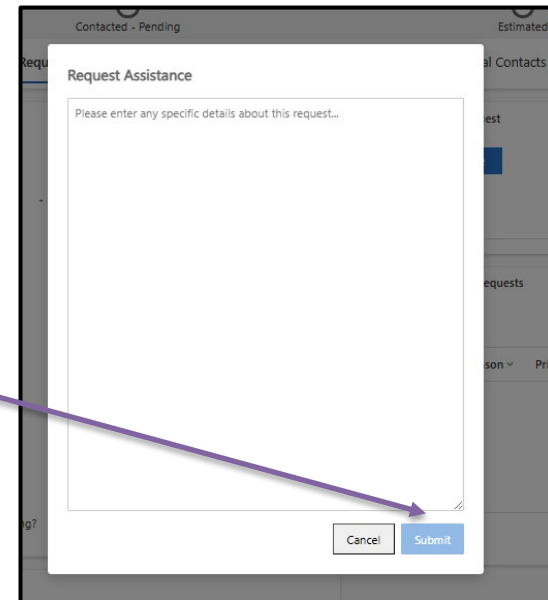


5. Provide extra key details in the note box that populates.

- a. Anything you would write in the initial email (prior process)
- b. Details that are not provided with the field options that are essential for a proper estimate.

6. Click Submit

7. The request will appear on your My Sales Team's Estimate Requests Dashboard where you can follow it's progress.

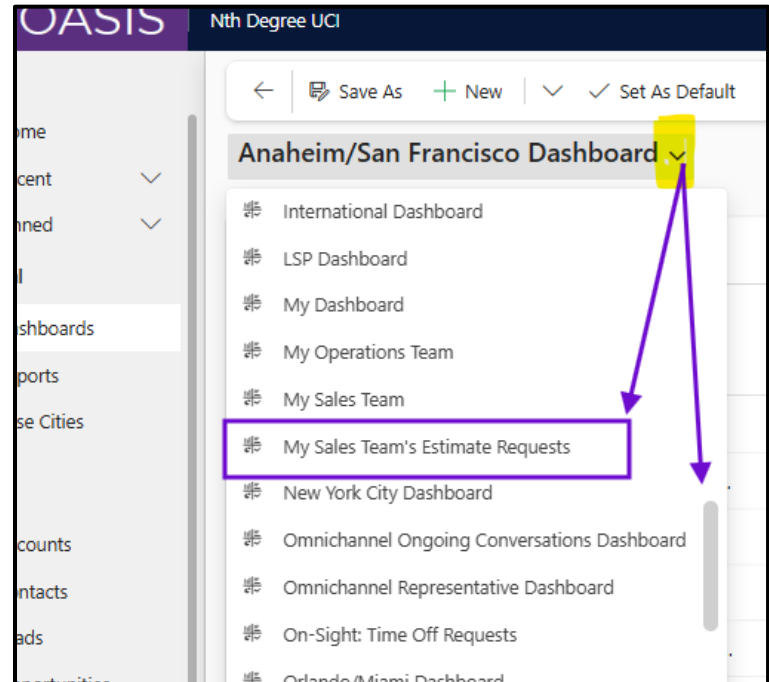


Dashboard

Dashboard Name:

My Sales Team's Estimate Requests

- 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 estimate team.

Dashboard

My Sales Team's Estimate Requests– cont'd

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

My Sales Team's Estimate Requests

My Estimate Requests - Pending Response

This box shows all requests waiting to be picked up by someone on the estimate team. Once a team member assigns it to themselves, it leaves this box and moves to the 'in process' box below.

My Estimate Requests - Action Required

This box shows all requests that need action from you. The estimator has put notes onto the request record that needs your attention – usually to provide additional information.

My 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.

Dashboard

My Sales Team's Estimate Requests – cont'd

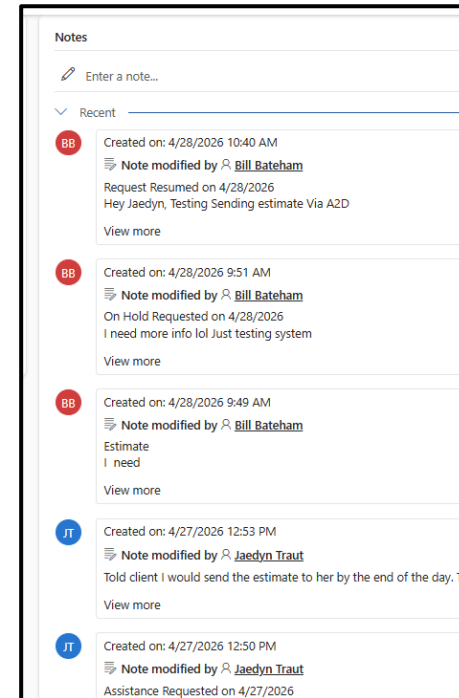
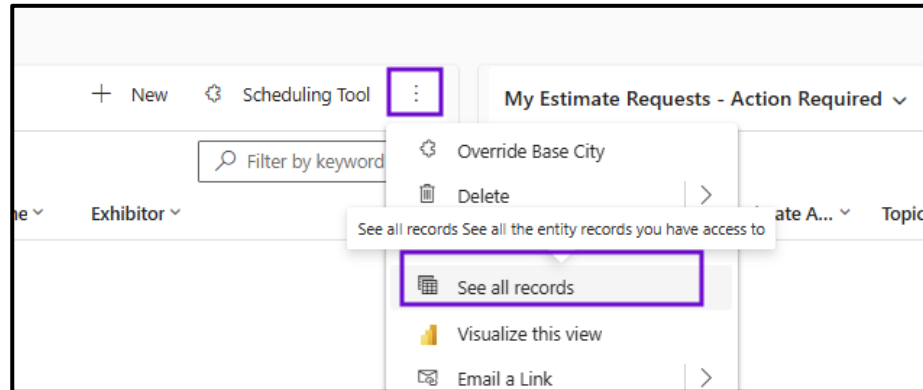
- All completed requests are listed at the very bottom of the dashboard

The screenshot displays a dashboard interface with two main sections. The top section, titled "My Sales Team's Estimate Requests", is further divided into "My Estimate Assistance In Process". This section features a table with columns: Short Name, Exhibitor, Requested By (Estimate ...), Sales Team, Primary Person Responsible (Esti...), Date In Process (Estimate As...), Date Resumed (Estimate ...), and Total Time On Hold (Estimate A...). The table is currently empty, showing a "We didn't find anything to show here" message. The bottom section, titled "My Estimate Requests - Completed", is highlighted with a purple border and contains a red text annotation: "This box shows all requests that have been completed and will drop off the list once they are converted to a work order. (Won)". This section also features a table with columns: Opportunity, Date Requested, Date In Process, Date Completed, Total Time On Hold, Primary Person Responsible, Exhibitor (Opportuni...), Source Customer (O...), and Sales Team (Opportu...).

Dashboard & Request Review

The dashboard provides quick and easy access to the details on your request.

1. From each dashboard quadrant, the list view can be expanded by clicking on the ellipses (*3 vertical dots*) in the upper right corner of each quadrant and then selecting “See all records”.
2. This expanded view presents additional columns with information that is helpful at a quick glance.
3. From either the quadrants or expanded views, click on the O# hyperlink for the specific request for additional information.
4. Click on the Estimate Request Tab
5. Review the Notes section on the far right.
 - a. Your initial note to the estimate team from the request submission is there.
 - b. Comments, questions, or actual estimate data from the estimate team will also be written here
(reminder: no outside emails...all dialogue is retained here)



Request Review - Notes

When adding notes....

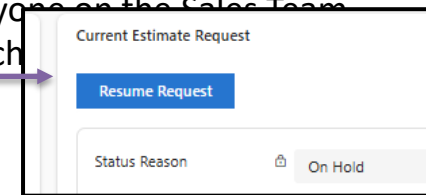
- **Utilize the Title** – see purple box below (sugg typing it in CAPS) for easier distinction of note subject when searching back for reference
- **Body of the note** (blue box) can be as lengthy of a note as needed. It will be date and time stamped + include the user (note writer's) name.
- **NEVER USE the paper clip to attach files. Only use A2D.**

The screenshot shows the 'Notes' application interface. At the top, there are icons for adding, listing, refreshing, and settings. Below this is the 'Create a note' section. A purple box highlights the 'Title' input field. Below the title field is a toolbar with icons for bold, italic, text color, background color, undo, redo, and a paperclip icon. A blue box highlights the large text area for the note body. At the bottom, there is a red box with a red 'X' over the paperclip icon, and a red arrow points from the text 'NEVER USE the paper clip to attach files' to this box. To the right of the paperclip icon are buttons for 'Add note and close' and 'Cancel'.

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

- Easy access to the O# link, so you can proceed with standard processes of
 - creating an estimate in the system,
 - discuss the estimate with the customer,
 - & convert the opportunity into a work order
- If the customer presents additional details for the job, warranting a new estimate, and you need additional assistance to create the revised estimate,
 - Simply create a new request and follow all of the same steps beginning on page 3.
 - The previous request(s) will be listed in the bottom right quadrant of the estimate request tab.

The screenshot displays a software interface for managing estimate requests. The top navigation bar includes tabs for Estimate Request, Billing, Shipping, Notes-Activities, Client Retention, Additional Contacts, Selling Conditions (Base City), and LinkedIn Sales Navigator. The main content area is divided into two sections: 'Current Estimate Request' and 'Completed Estimate Requests'. The 'Current Estimate Request' section features a 'Request Assistance' button, which is highlighted with a purple box. Below it, the text 'Source record not selected' is visible. The 'Completed Estimate Requests' section contains a table with the following columns: Status, Primary Person, Date Requested, Date in Progress, Date Completed, and Total Time On Job. A single row is shown with the status 'Completed', primary person 'Matt Wilcox', and various dates. A purple arrow points from the 'Request Assistance' button to the 'Completed Estimate Requests' table. The left sidebar shows a list of accounts and filters, including 'Test Suyati Account', 'Test Suyati Venue', and 'Test Suyati Salesteam'.

- Once your customer approves your 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!