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

1
Request is Submitted

2
Estimator is Assigned to it
“In Process”

3
Estimator has all the info needed & responds with estimate details
“Completed”

or

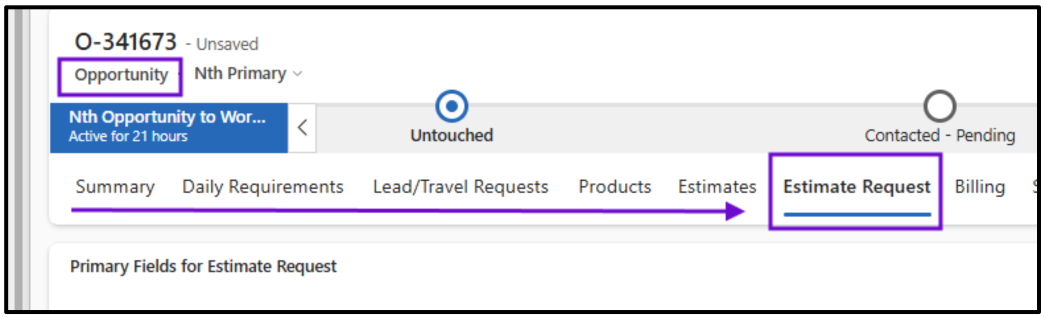
4
Estimator needs more info and responds in ‘notes’ with comments/ques.
“On Hold”

5
Sales will provide response/ answers via “Resume Request” Button & Notes
“In Process” (again)

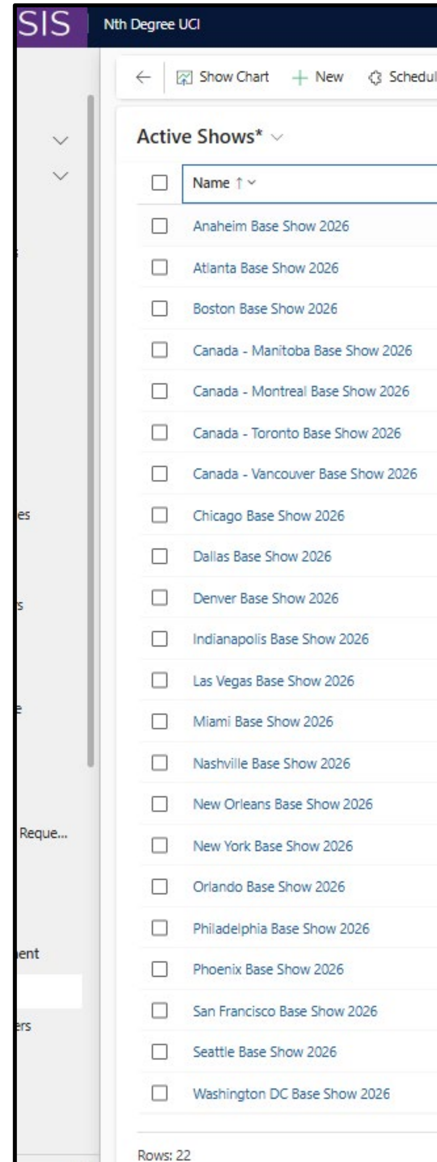
6
Sales and Estimate Team will go back and forth between steps 4 and 5 until resolved and then finally marked “Complete”

Creating an Estimate Request

1. **Open (or create) the Opportunity Record**
   a. If the show is not yet in OASIS, please use the appropriate "*City Name* Base Show" (suggest searching " *base show* " for the isolated list)
   b. 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**

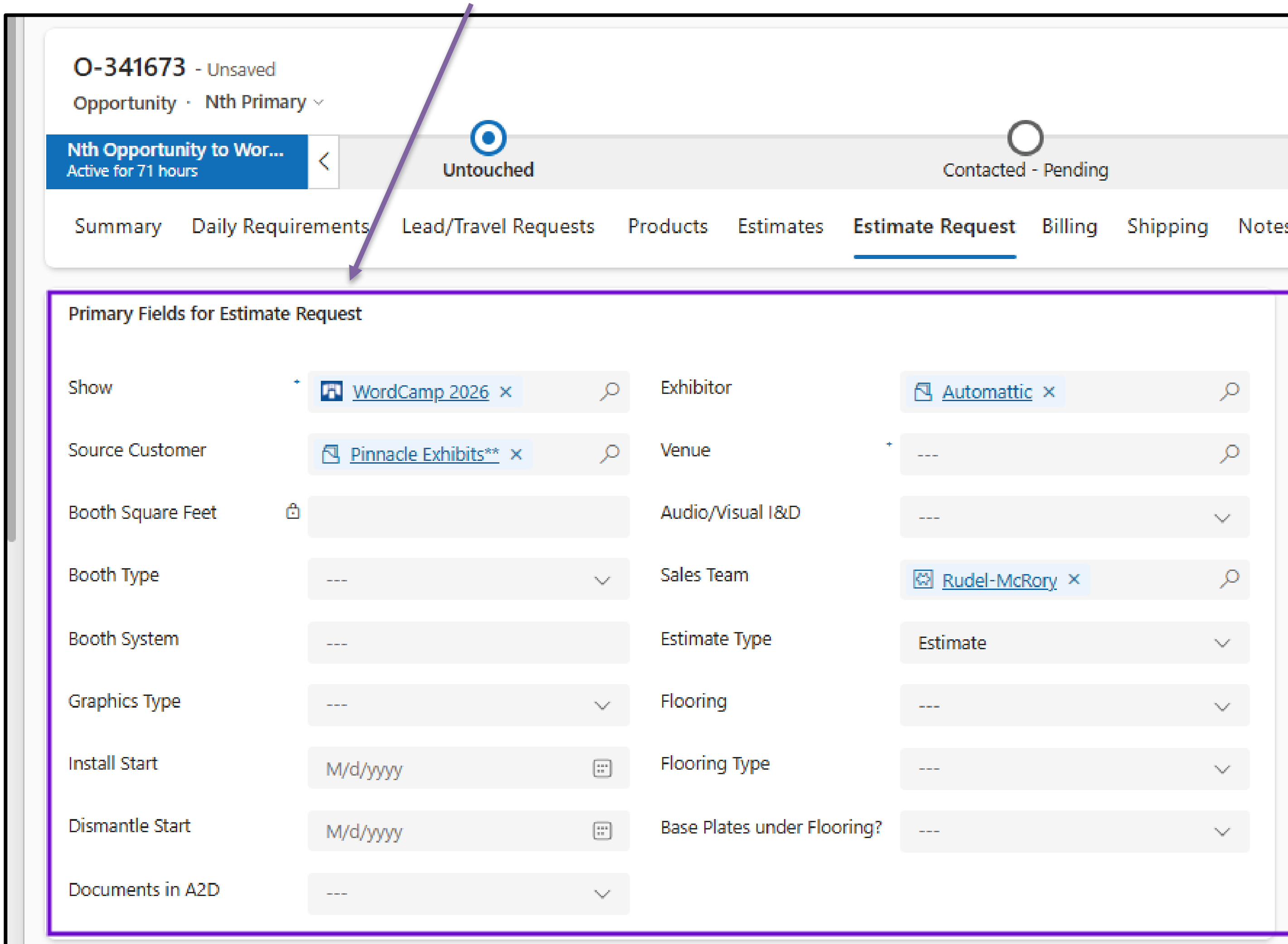


3. **Fill out all empty fields in the "Primary Fields for Estimate Request"**
   a. These are required to request assistance (a reminder pop-up box will display what is missing)
   b. Half of them are auto-filled from the show record or opportunity summary page.
   c. Secondary Fields are not required but encouraged to be filled out if any apply. **(see image on next page)**



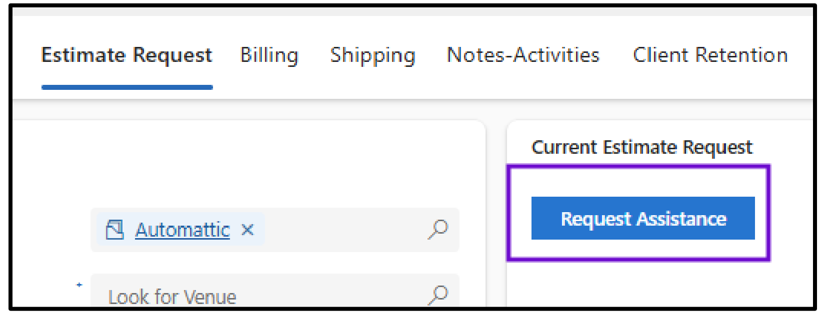
Creating an Estimate Request

"Primary Fields for Estimate Request"



Creating an Estimate Request

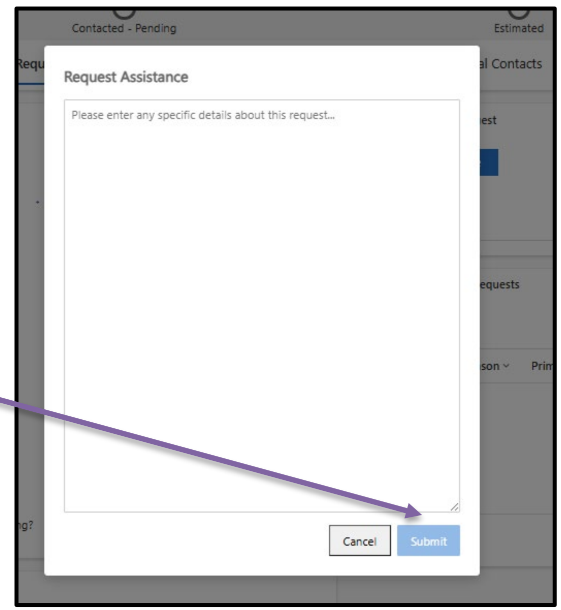
4. **Click the ‘Request Assistance Button’**



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.



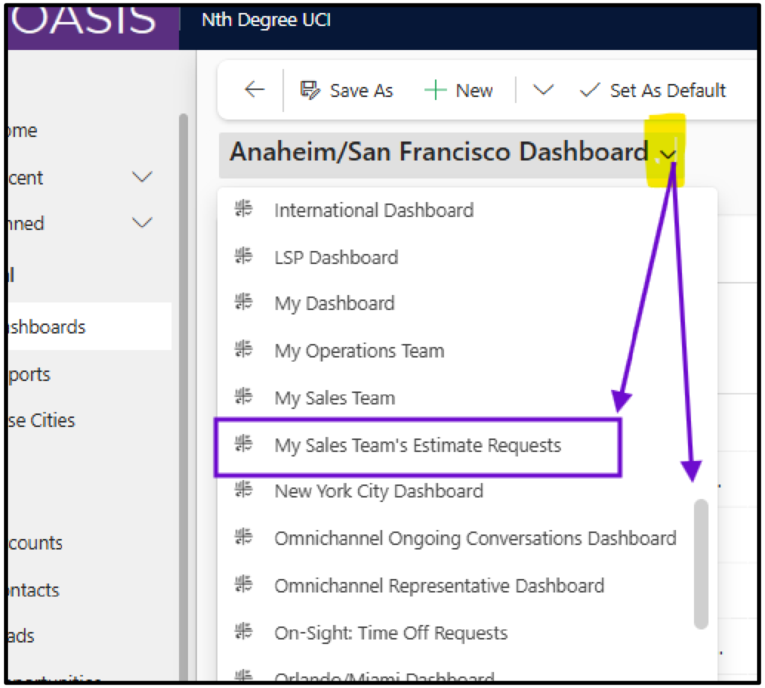
6. **Click Submit**

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



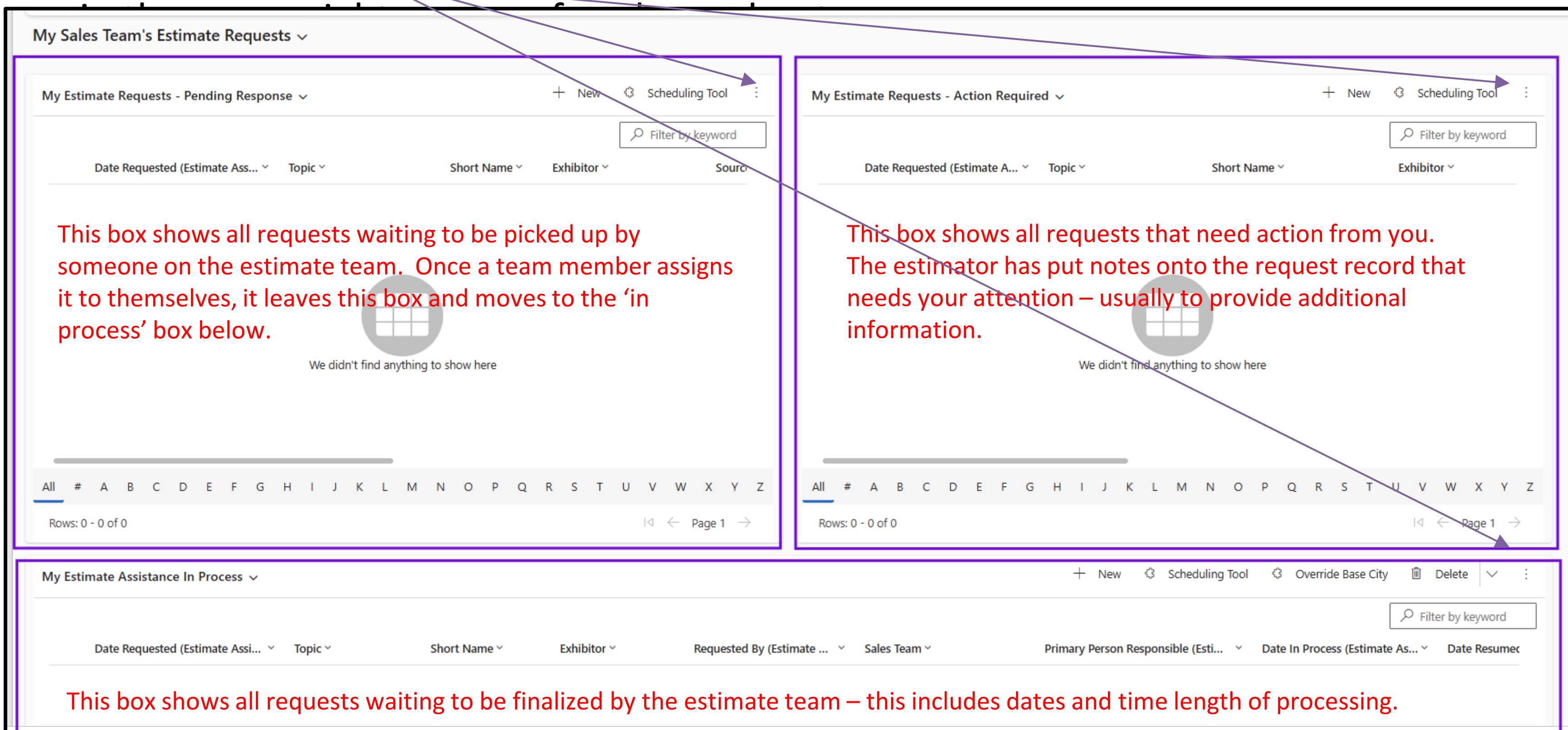
Purpose –

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)



Dashboard

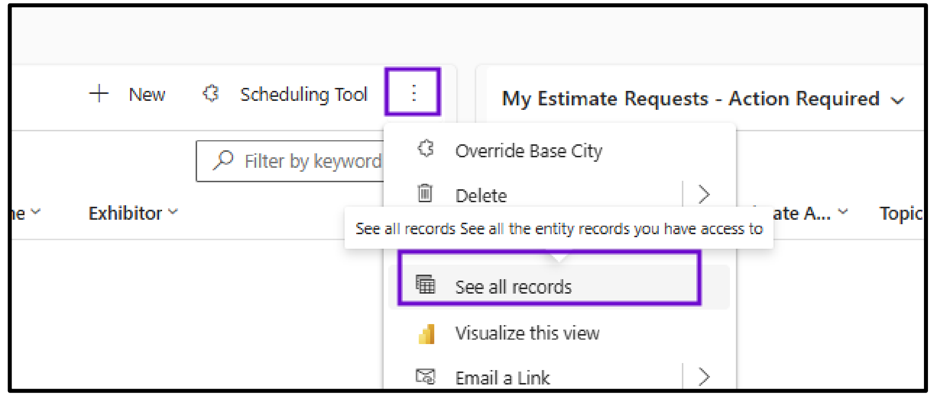
My Sales Team's Estimate Requests – cont'd

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

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".



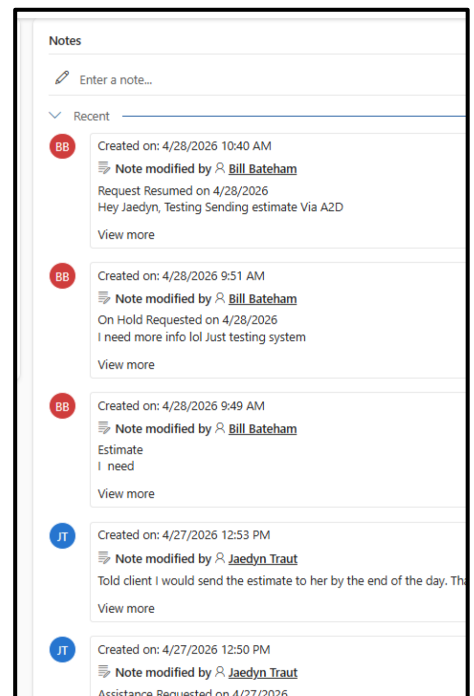
2. This expanded view presents additional columns with information that is helpful at a quick glance.

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

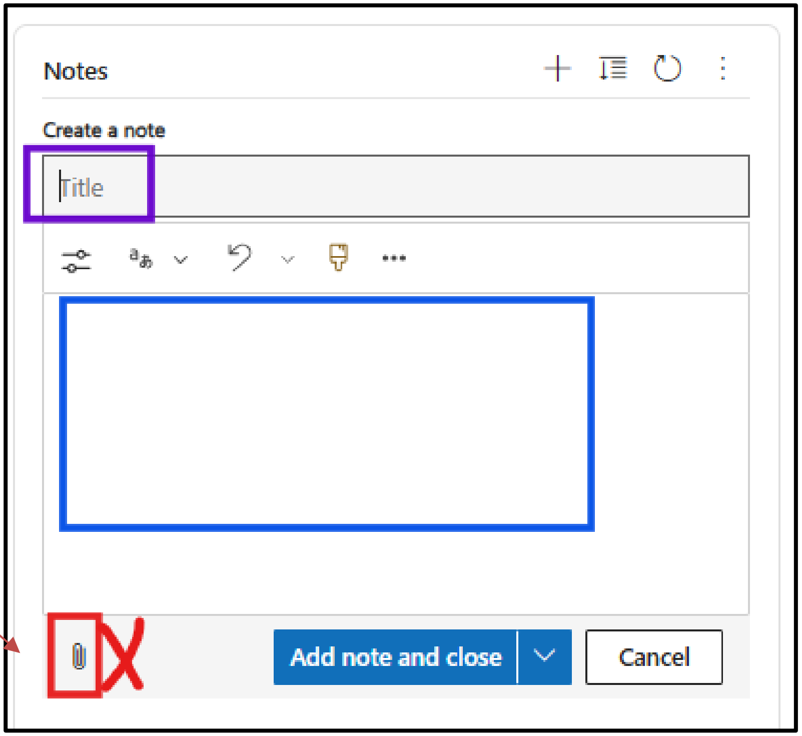
(reminder: no outside emails…all dialogue is retained here)



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**.

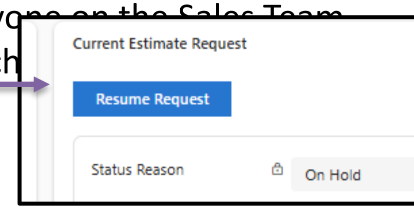


Notifications

Email notifications are sent when an estimate request changes status:

- **<u>Estimate Request is initiated</u>** : 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.

- **<u>Status changed to On Hold</u>:** email alert with link to the O# is sent to everyo
If the estimate team needs additional info from the sales team, they will ch



    - ✓ 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.

- **<u>Status changed to In Process:</u>** 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

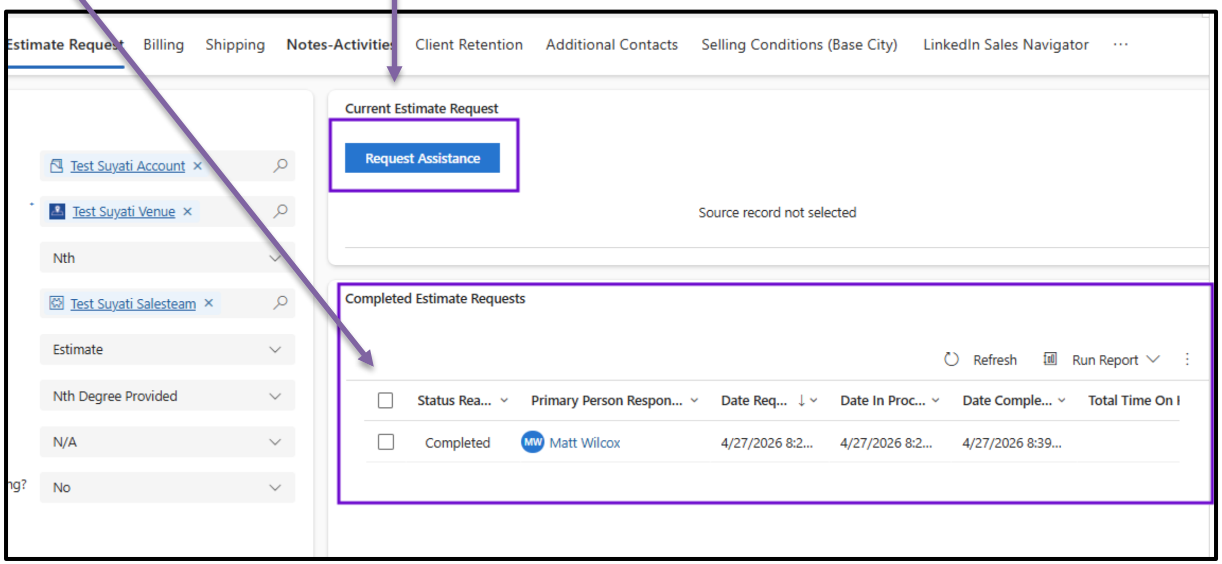
- **<u>Status changed to Complete</u>:** email alert, as described above, is resent to everyone on the Sales Team.
    - ✓ All actions are finished & found in the lower right quadrant of the Estimate Requests (for Est Team) Dashboard and the bottom row of the My Sales Team's Estimate Requests Dashboard.

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.



- 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!