

Quote to BOPIS QRG

Introduction

Providing our retail customers an easier way to BOPIS will generate more demand while turning more visits into planned visits.

Customer expectations

Our customers expect to have a quick and seamless online experience. To save customers time on our website, you can create and send a quote for the products you have identified to meet their needs. Quotes can be sent via email, text message, or both. The customer can view the quote and check out online, converting the quote to a BOPIS order.

Creating a quote to BOPIS

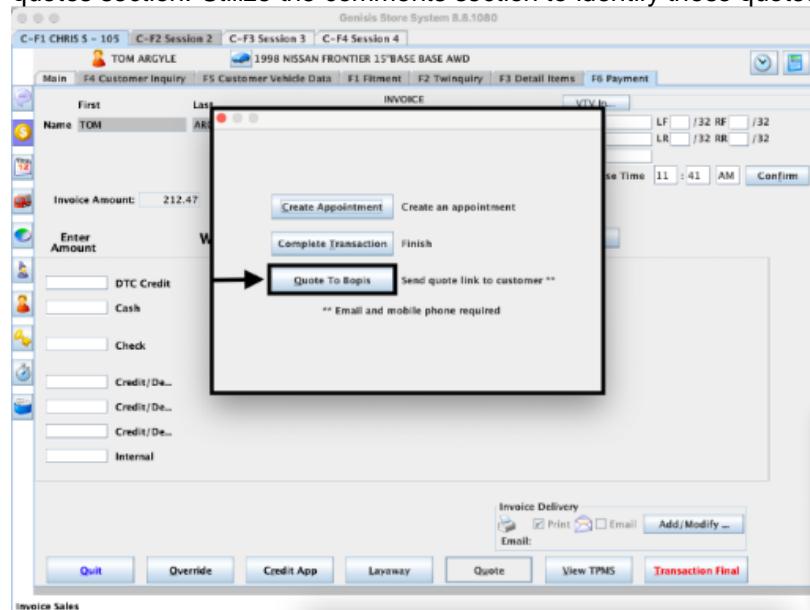
Verify the customer's name, telephone number, and email when creating the quote.

Select the pink/magenta My Account customer profile if available.

Do NOT create an appointment if you intend to send quote to BOPIS. (Customers can schedule what fits their needs during the checkout process).

Validate any promotions and total price prior to sending quote to BOPIS. Utilize the [Promotion Calculator](#) if needed.

NOTE: There is no indicator in the POS to distinguish a quote to BOPIS in the quotes section. Utilize the comments section to identify these quotes.



Earn the Visit

Remember to follow the [Earn the Visit Operational Best Practice](#) and utilize the [Earn the Visit Shadow Observation Worksheet](#) prior to sending a quote to BOPIS.

If miscellaneous product is requested, follow the [Special Orders Best Practice](#) in store or during ETV.

**Following Up
with Quote to
BOPIS
customers**

Remember to follow the [BOPIS and Web Customers Best Practice](#) once the quote has been converted to a BOPIS order.

NOTE: Following up with Quote to BOPIS customers within 24 hours, if the quote has not been completed, is recommended.

**Delivering on
expectations**

Please note the following scenarios that will prevent the customer from checking out online. If you encounter an issue, work with your manager for assistance.

- Quotes cannot be altered after they are sent. Verify that all product, labor, pricing, availability, and promotions are correct before sending the quote.
- Quotes expire after 30 days. When the quote expires, it cannot be completed online until it is recreated in the POS.
- If a promotion on a quote expires, the quote will expire as well.
- Quotes that contain miscellaneous articles or articles not found on the web (e.g., studding, heat cycling, storage) cannot be completed. Follow the [Special Orders Best Practice](#) in these scenarios.
- Quotes that contain adjustments cannot be completed
- Mismatched quantity of certificates (e.g., 3 tires and 4 certificates)
- Items on backorder