

This lesson explains actions you can take on Bid Requests tab. All “Bid Requests” Service Order opportunities display on Bid Requests tab until they Expire **OR** Service Order is awarded to a Service Pro. You can Place a Bid, Place a Bid and Change Bid Expiration, Place a Bid and Request New Service Date & Time, Change Bid or Reject Service Order. Comments are available for Providers & Buyers to communicate about the Service Order, ask questions or share information. Buyer & all Providers that received Service Order opportunity can add, view, or reply to comments. Comments typically are entered during the time when Providers are determining if they are going to Accept Service Order (Received tab) **OR** during Bid process (Bid Requests tab).

1. Lifecycle/Status of a Service Order:

a. Posted

- Buyer Posts a Name Your Price Service Order, which they **identify price**. Provider can view/take action from **Received** tab.
- Buyer Posts a Bid Request Service Order, which they **ask for bids**. Provider can view/take action from **Bid Requests** tab.

b. Accepted – On Name Your Price, once Provider Accepts or Buyer Accepts Provider’s Counter Offer, Service Order will change to **Accepted** status and will be located on **Accepted** tab until Service Date/Time. On Bid Requests, once Buyer Accepts Bid, Service Order will change to **Accepted** status and will be located on **Accepted** tab until Service Date/Time.

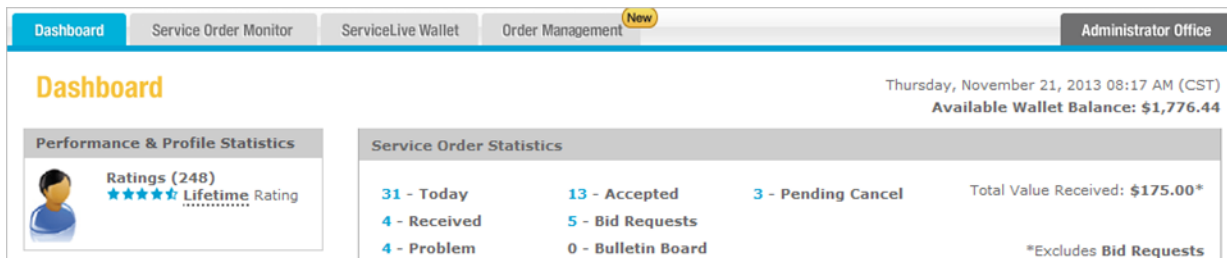
c. Active – Once the Service Date/Time occurs, Service Order will change to **Active** status and will be located on **Today** tab.

d. Completed – Once Provider submits Service Order for payment, Service Order will change to **Completed** status and will be located on **Today** tab.

e. Closed – Once Buyer Closes and Pays, Service Order will change to **Closed** status and will be located on **Inactive** tab.

f. Service Orders can be in three other statuses: **Pending Cancel** status located on **Today** tab, **Cancelled** status located on **Inactive** tab and **Problem** status located on **Problem** tab.

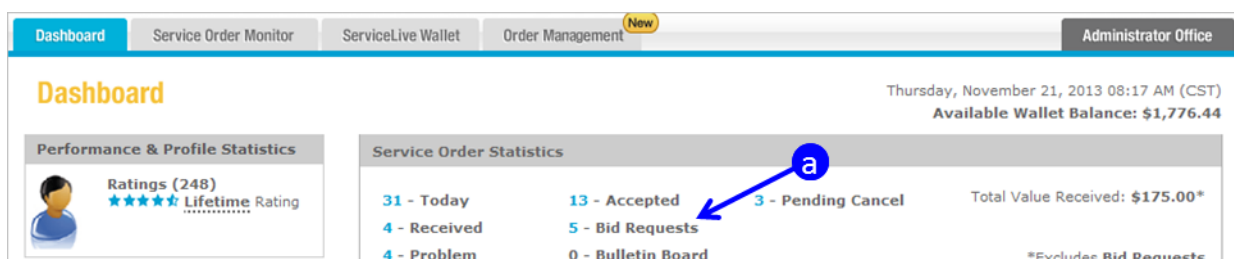
2. When you login to ServiceLive, the **Dashboard** tab will open.



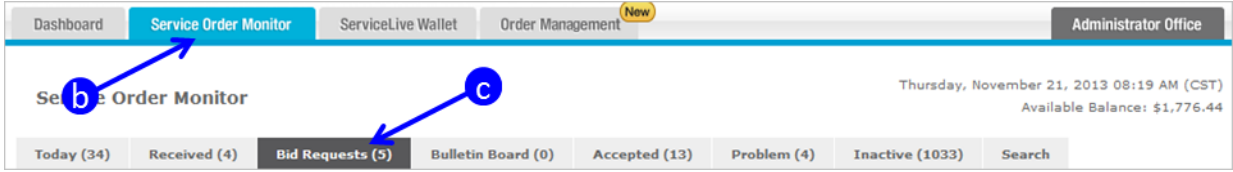
3. Navigate to Bid Requests tab:

Note: There are multiple ways to navigate to Bid Requests tab information. Dashboard will show number of orders currently on Bid Requests tab.

a. Click on **Bid Requests** link on dashboard.



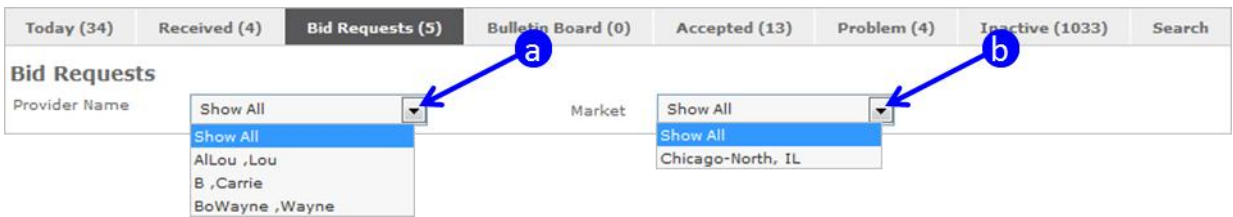
- b. **OR** click on Service Order Monitor tab.
- c. Click on **Bid Requests** tab.



4. Search Filters on Received Tab:

Note: Search filters default to Show All.

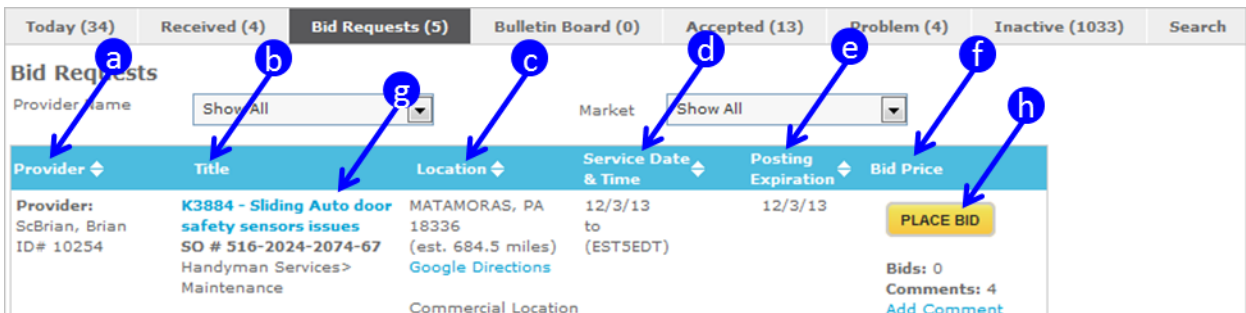
- a. Service Pro Name Filter = Click on **drop down arrow** to display **Service Pro** choices. Click on appropriate choice and Service Orders you selected will display.
- b. Market Filter = Click on **drop down arrow** and list of **Markets** will display. Click on appropriate choice and Service Orders you selected will display.



5. Information that displays on Bid Requests tab:

Note: Click on text in table header **OR** button to change sort order.

- a. Provider = name of Provider that Service Order is routed to **OR** if there are multiple Service Pros in Provider Firm who are part of routing list, this will display as Multiple Providers.
Note: If there are Multiple Providers only Place Bid for one Provider.
- b. Title = Service Order information which includes Title (Name) entered for Service Order and Service Order #.
- c. Location = City, State, and Zip Code for Service visit.
- d. Service Date & Time = Date and Time Service is scheduled.
- e. Posting Expiration = indicates Service Order Appointment Start Date.
- f. Bid Price = identifies if Sealed or Open Bid and location you go to Place Bid.
- g. Click on **Title** link to display Service Order details on Summary tab.
- h. **OR** click on **PLACE BID** button to display Service Order details on Summary tab.



6. Information that displays on Summary tab:

- a. Once you open Service Order, the Summary tab will display the following sections, which include detailed information that Buyer entered for this Service Order.
 - General Information
 - Scope of Work
 - Service Order Bids
 - Comments
 - Add Comments
 - View Comments
 - Reply to Comments
 - Contact Information
 - Documents & Photos
 - Facilities-Overview-BID
 - Bid Proposal Template
 - Parts
- b. Providers should evaluate information for each Service Order before you Place a Bid, Place a Bid and Change Bid Expiration, Place a Bid and Request New Service Date & Time or Reject Service Order.
- c. The next several steps in this lesson identify the sections/information that is important to review when determining if you want to Place a Bid or Reject Service Order.

Note: Click on or buttons to expand or collapse sections.

The screenshot shows the 'Summary' tab of a Service Order Bid form. On the left, there are expandable sections: 'General Information', 'Scope of work', 'Service Order Bids', and 'All Other Bids'. The 'Service Order Bids' section shows 'Total Bids: 1' with a range of '\$100.00 - \$100.00'. Below it, a table lists a bid from 'Provider Bid: Thu Jun 27 11:33:00 CDT 2013' with an expiration of '12/05/13 12:00 AM' and a bid amount of '\$100.00'. The comment for this bid is 'because because because BECAUSE! Because of the wonderful things he does!'. Other sections include 'Comments', 'Contact Information', 'Documents & Photos', and 'Parts'. On the right, the 'Service Order Bid' form is active, showing options for 'Fixed Price' (selected) or 'Hourly Rate'. It includes input fields for 'Maximum Labor' and 'Maximum Materials', both currently at '\$ 0.00', and a 'Total Bid' field. Below these are checkboxes for 'Change Bid Expiration' and 'Request New Service Date & Time'. A 'Comments with Bid' section is also present. At the bottom right, there is a 'Submit' button and a 'REJECT SERVICE ORDER' button. A blue button at the very bottom right says 'RETURN TO SERVICE ORDER MONITOR'.

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7. Summary tab - **General Information** section:

- a. Appointment Date = Date and Time Buyer has requested Service Order to be completed.
- b. Location = Street Address, City, State, and Zip Code for Service visit.
- c. Google Directions = Link to Google map from your Provider Firm office to Service Location.
- d. Overview = Details of what Buyer is requiring Provider to do for Service Order.
- e. Buyer Terms & Conditions = The Terms & Conditions you agree to if you Accept Service Order (without conditions).

General Information

Created: Jun 19, 2013 12:37 AM (CST)
 Received: Jun 19, 2013 12:50 AM (CST)
 Last Updated: Oct 25, 2013 02:05 AM (CST)

Appointment Date(s): Dec 3, 2013 - Dec 4, 2013
Service Window: 08:00 AM - 05:00 PM (EST)
 [Provider will confirm the appointment with Service location Contact(s)]

Location: MATAMORAS, PA 18336
 (est 689.63 miles)
[Google Directions](#)

Title:
 K3884 - Sliding Auto door safety sensors issues

Comments: 4 [Add Comment](#)
Bids: 0 \$0.00 - \$0.00

Overview
 1) Contact the designated Buyer within 48 hours of receiving the opportunity to schedule a site visit to meet with store management to review scope of work details at your own cost 2) Calculate the estimate including labor, material, travel and any incidental expenses associated with completing scope of work details. To submit the free "Bid Offer" log into your ServiceLive account 3) Go to the "Bid" tab and locate service order, place your Bid offer to submit to Buyer. 4) if you are awarded the service order you must arrive on time based on appointment date and service window set on service order. 5) Complete to scope of work and ensure that work is performed in compliance with all current local, state and federal mandates and comply with any manufacturers recommendations and industry standards. 6) Test or review for proper performance. 7) Conduct review session with customer to explain what was done and to ensure the customer is satisfied with the work completed. 8) Clean up any job related debris and dispose of any packaging or other job related materials. 9) Take before and after pictures and obtain signature from customer to indicate work was performed to satisfaction. 10) You MUST upload the before and after pictures along with signed certificate of completion when submitting for a release of funds to the Buyer. Any questions contact ServiceLive Support at 1-888-549-0640.

Buyer's Terms & Conditions
 This Service Order is subject to, and incorporates by reference, that certain "SELECT PROVIDER SERVICE AGREEMENT" or other agreement (the Agreement), between Provider Firm and Sears; provided that only the charges set forth in this Service Order (and not those in the Agreement) shall apply to this Service Order (and Provider Firm agrees that by accepting this Service Order, Provider is agreeing to such change). This Service Orders closing total is subject to the 10% Service Order Fee charged by ServiceLive, Inc. Subject to Provider Firms responsibilities under the Select Provider Service Agreement, Provider Firm is permitted to have additional Service Pros provide Services under this SOW.

8. Summary tab - **Scope of Work** section:

- a. Task Comments – review this section to identify details of required work to be completed.

Summary

General Information

Scope of work

Service Location Information
 Commercial
 MATAMORAS, PA 18336

Job Information
Main Service Category Handyman Services

K3884 - Sliding Auto door safety se

Category General Carpentry
Sub-Category Doors
Skill Maintenance

Task Comments
 K3884 - Sliding Auto door safety sensors issues Exterior Exit sliding door safety sensor issues Garden Shop
 Exterior Exit sliding door safety sensor issues Repairs to all current safety standards including ANSI

9. Summary Tab – Service Order Bids section:

a. This information will display on Summary tab **PRIOR** to Provider Placing a Bid.

Summary

- General Information
- Scope of work
- Service Order Bids
 - Total Bids: 0** Add your bid using the form on the right.
- Comments
- Contact Information
- Documents & Photos
- Parts

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Service Order Bid

An asterisk (*) indicates a required field

Fixed Price Hourly Rate

Maximum Labor:* \$ 0.00

Maximum Materials:* \$ 0.00

Total Bid: \$

Bid Expires: 12/4/13

Change Bid Expiration

Request New Service Date & Time

Comments with Bid:*

I accept the [Terms and Conditions*](#)

This estimate will be visible by all providers selected for the project.

b. This information will display **AFTER** Provider Places a Bid.

Summary

- General Information
- Scope of work
- Service Order Bids
 - Total Bids: 1** Add your bid using the form on the right. **Range: \$100.00 - \$100.00**
- All Other Bids
 - Provider Bid:** Thu Jun 27 11:33:00 CDT 2013 Expires: 12/05/13 12:00 AM **\$100.00**
 - because because because BECAUSE! Because of the wonderful things he does!
- Comments
- Contact Information
- Documents & Photos
- Parts

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Service Order Bid

An asterisk (*) indicates a required field

Fixed Price Hourly Rate

Maximum Labor:* \$ 0.00

Maximum Materials:* \$ 0.00

Total Bid: \$

Bid Expires: 12/4/13

Change Bid Expiration

Request New Service Date & Time

Comments with Bid:*

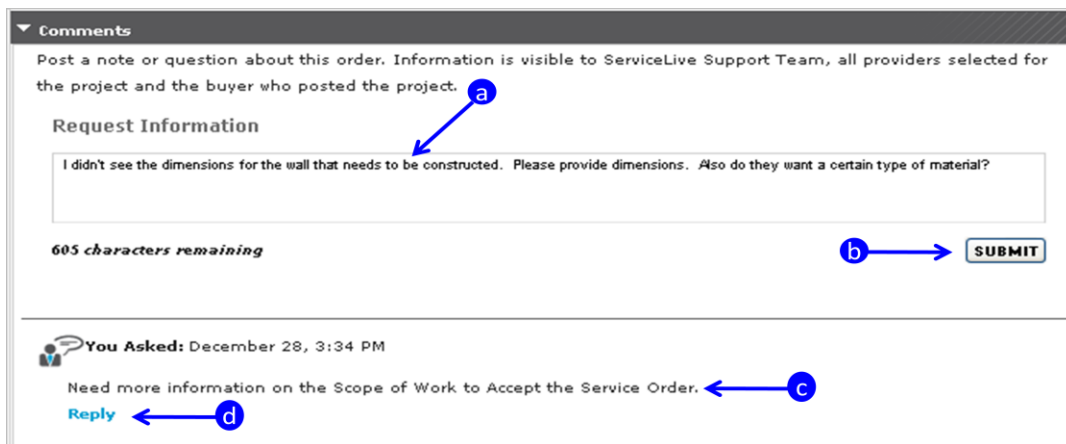
I accept the [Terms and Conditions*](#)

This estimate will be visible by all providers selected for the project.

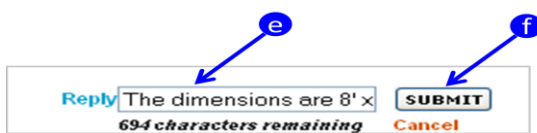
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10. Summary Tab – **Comments** section:

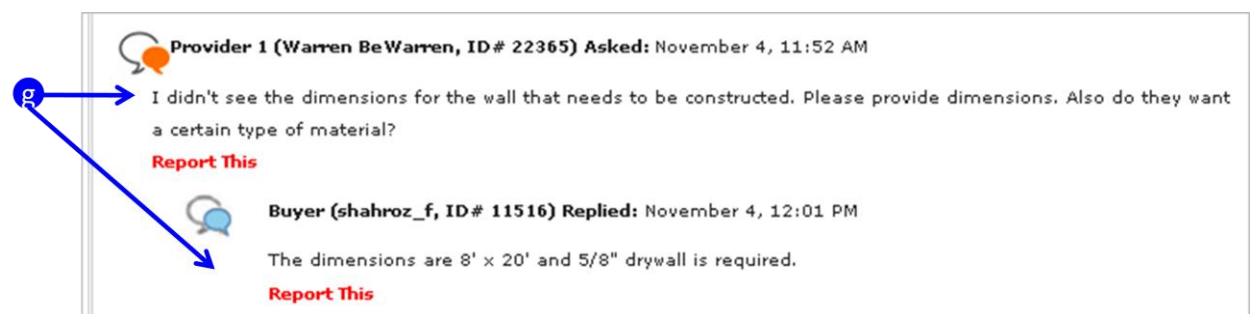
- Comments are available for Providers & Buyers to communicate about the Service Order, ask questions or share information.
 - Messages are visible to all Providers the Service Order has been routed to.
 - Sharing contact information, names, etc. at this point, violates Terms & Conditions of the Marketplace.
 - Buyer & all Providers that received Service Order opportunity can add, view, or reply to comments.
 - Comments typically are entered during the time when Providers are determining if they are going to Accept Service Order (Received tab) **OR** during Bid process.
- a. To **Add Comment**, type Comment in box.
 - b. Click on **Submit** button.
 - c. **OR** to **View Comment**, scroll down in Comments section.
 - d. **OR** to **Reply to Comment** from another Provider or Buyer, click on **Reply** link.



- e. Type appropriate reply or ask another question in box.
- f. Click on **Submit** button.



- g. All Providers that have received this Service Order opportunity will see **Comments** and **Replies**.



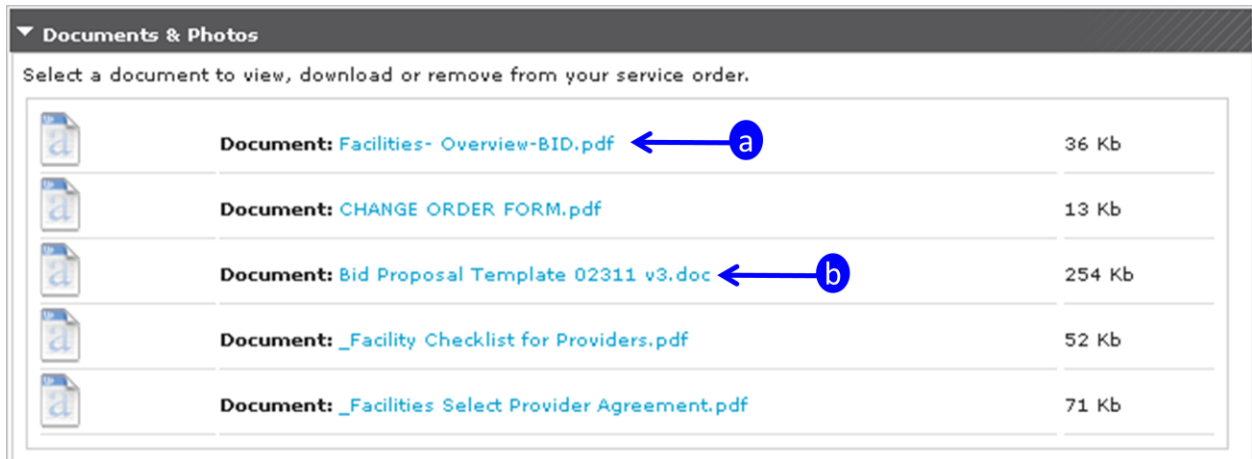
11. Summary Tab – Documents & Photos section:

- a. Save and/or Print Facilities-Overview-BID document.

Note: Review to understand Bid submission process and associated timelines.

- b. Save and/or Print Bid Proposal Template document to be used in Step 11 in this lesson.

Note: For instructions on how to save and/or print documents, refer to **Complete for Payment** or **Sears RI Complete for Payment** lessons in **Complete and Close a Service Order** course for details.



12. Summary Tab – Parts section:

- a. Review to identify if there are Parts or Product that require pick up and installation.

- b. Review to identify pick-up location.



- c. If no parts are required for pickup, Parts section will display with below information.



13. Instructions to Complete Bid Proposal:

- a. Locate **Bid Proposal Template document** you saved on your computer in Step 9 earlier in this lesson.
- b. Complete “Bid Proposal Template” by going to each section in **red** and typing your information over instructions. (Follow Bid Proposal Example in same document).

Note: Delete any extra numbers unnecessary for your Bid Proposal.

- c. Copy information you completed in Bid Proposal Template section. (This will remain on your clipboard.)
- d. Paste completed information into an email and send to SearsFacilities@servicelive.com
- e. In subject line of email include your Provider # and Service Order #

Example: Subject: Provider 12345 is submitting a Bid proposal for SO # 123-4567-1234-11.

- f. You will also copy completed information into ServiceLive as explained in Step 13, 14 & 15 in this lesson.

14. Service Order Bid – **Place a Bid:**

- a. Click radio button labeled “**Fixed Price**”.
- b. Type appropriate dollar amount for **Maximum Labor**.
- c. Type appropriate dollar amount for **Maximum Materials** if applicable.
- d. Copy and paste Completed Bid Proposal Template from Step 11 in Comments Box.
- e. Click in **checkbox** labeled “**I accept the Terms & Conditions**”.
- f. Click on **Submit** button.

The screenshot shows a 'Service Order Bid' form with the following elements and annotations:

- a:** Points to the 'Fixed Price' radio button.
- b:** Points to the 'Maximum Labor' input field containing '1300.00'.
- c:** Points to the 'Maximum Materials' input field containing '1000.00'.
- d:** Points to the 'Comments with Bid' text area containing the text: 'This quote includes: the removal of an existing set of 6/0 x 7/0 double action doors'.
- e:** Points to the checked checkbox for 'I accept the Terms and Conditions'.
- f:** Points to the 'Submit' button.

- g. Summary tab will open and “**Bid Submitted**” message will display.
- h. Scroll down on Summary tab to **Service Order Bids** section and your **Bid Information** will display.

Summary

Bid Submitted ← **g**

▶ General Information

▶ Scope of work

▼ Service Order Bids

Total Bids: 1 **Range: \$1,200.00 - \$1,200.00**

Your bid: 11/21/13 10:10 AM **Expires: 12/04/13 12:00 AM** **\$1,200.00**

Hourly Rate: N/A
 Estimated Time to Complete: N/A
 Total Labor: \$1,000.00
 Materials Estimate: \$200.00
 Total Job Cost: \$1,200.00

This quote includes: the removal of an existing set of 6/0 x 7/0 double action doors and replace them with a new set. The replacement doors will be double action, high impact, polymer construction with two 12"x16" clear acrylic windows, 18" high impact bumpers and 9" high jam guards. The material cost is \$200 and the labor cost is \$1000. The total Bid to complete this job is \$1200.

h

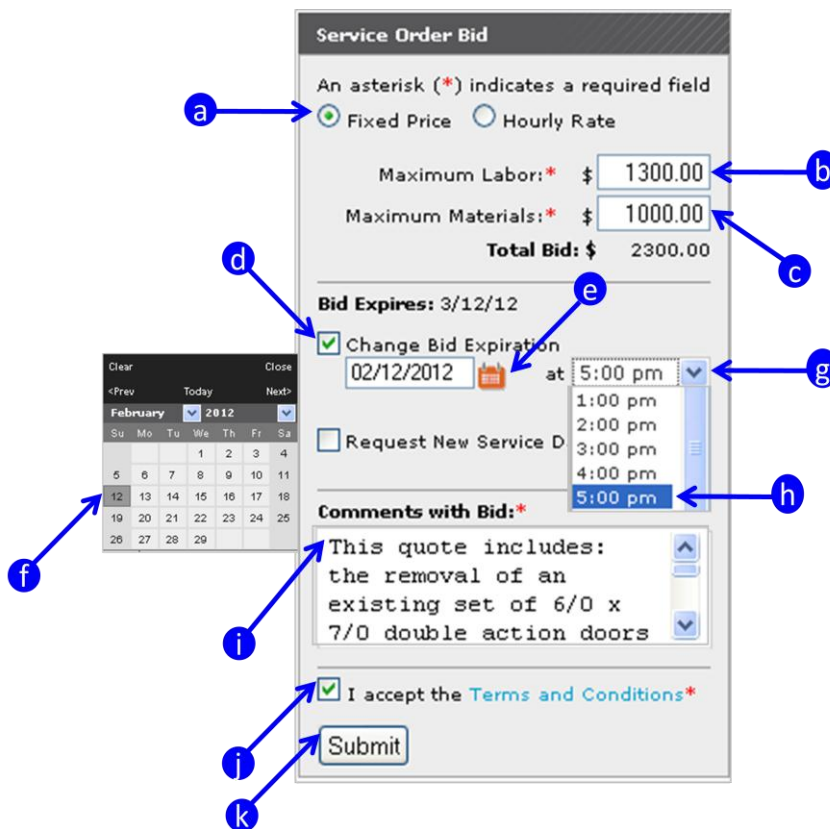
- i. If you are awarded Service Order, it will be located in **Accepted** tab **OR Today** tab in Active status if Bid is Accepted while within Service Window.
- j. If you are NOT awarded Service Order, it will no longer appear in Bid Requests tab and you will not see Service Order anywhere.

15. Service Order Bid – Place a Bid and Change Bid Expiration:

- You Place a Bid and Change Bid Expiration if you want your Bid to Expire different from Bid Expiration date Buyer set, possibly because of Service Pro capacity or material costs fluctuation.
- You may change your Bid Expiration date, but this is NOT recommended.
- Buyer will be evaluating Bids and by you changing Bid date Buyer might not have opportunity to evaluate your Bid.
- Once your Bid expires you are not in the running for Service Order opportunity.

Note: Request to Change Bid Expiration does not remove Bid opportunity from Marketplace. If another Provider Places a Bid, which is accepted by Buyer, Service Order will no longer be available on Bid Requests tab.

- Click radio button labeled **“Fixed Price”**.
- Type appropriate dollar amount for **Maximum Labor**.
- Type appropriate dollar amount for **Maximum Materials** if applicable.
- Click on **checkbox** labeled **“Change Bid Expiration”**.
- Click on button to display calendar.
- Click on appropriate date choice.
- Click on **drop down arrow** next to time.
- Scroll down and click on appropriate time choice.
- Copy and paste Completed Bid Proposal Template from Step 11 in Comments Box.
- Click in **checkbox** labeled **“I accept the Terms & Conditions”**.
- Click on **Submit** button.



- l. Summary tab will open and “Bid Submitted” message will display.
- m. Scroll down on Summary tab to **Service Order Bids** section and your **Bid Information** will display.
- n. In Service Order Bids section, Bid Expiration Change will also display.

The screenshot shows a 'Summary' tab with a 'Bid Submitted' message at the top. Below are sections for 'General Information', 'Scope of work', and 'Service Order Bids'. The 'Service Order Bids' section shows 'Total Bids: 1' and a 'Range: \$1,200.00 - \$1,200.00'. A callout 'l' points to the 'Bid Submitted' message. A callout 'm' points to the bid details table. A callout 'n' points to the 'Expires' date.

Your bid: 11/21/13 10:17 AM		Expires: 12/12/13 05:00 AM	\$1,200.00
Hourly Rate:	N/A		
Estimated Time to Complete:	N/A		
Total Labor:	\$1,000.00		
Materials Estimate:	\$200.00		
Total Job Cost:	\$1,200.00		

This quote includes: the removal of an existing set of 6/0 x 7/0 double action doors and replace them with a new set. The replacement doors will be double action, high impact, polymer construction with two 12?x16? clear acrylic windows, 18? high impact bumpers and 9? high jam guards. The material cost is \$200 and the labor cost is \$1000. The total Bid to complete this job is \$1200.

- o. If you are awarded Service Order, it will be located in **Accepted** tab **OR Today** tab in Active status if Bid is Accepted while within Service Window.
- p. If you are NOT awarded Service Order, it will no longer appear in Bid Requests tab and you will not see Service Order anywhere.

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16. Service Order Bid – Place a Bid and Request New Service Date & Time:

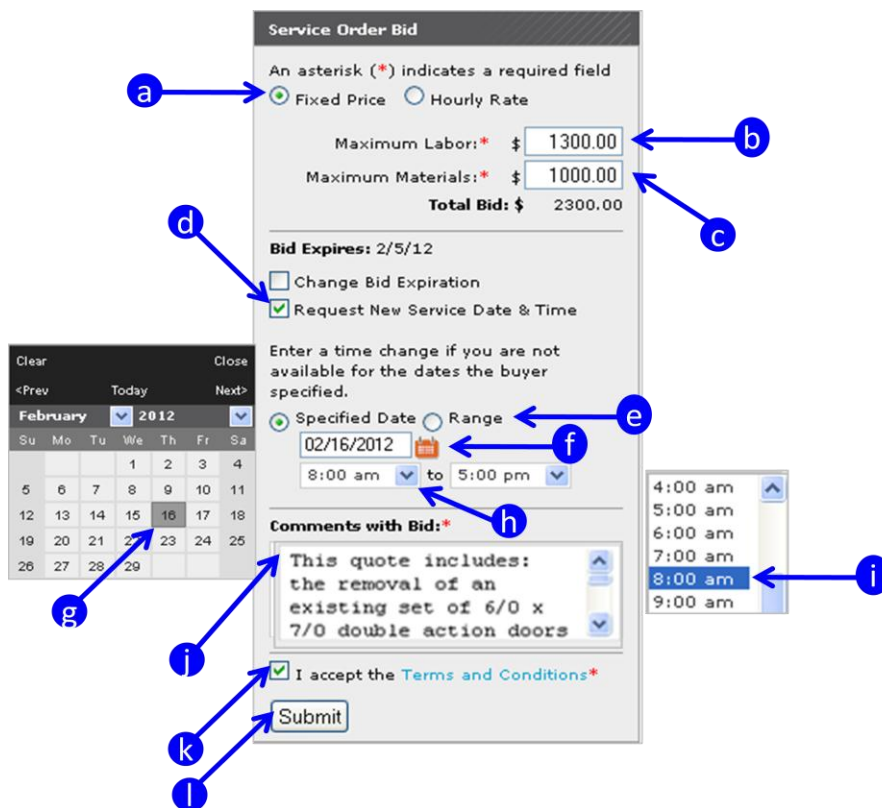
- You can Place a Bid and Request New Service Date & Time if you are unable to complete Service Order within Service Date & Time.

Note: Place a Bid and Request for New Service Date & Time does not remove Bid opportunity from Marketplace. If another Provider Places a Bid, which is accepted by Buyer, Service Order will no longer be available on Bid Requests tab.

- Click radio button labeled **“Fixed Price”**.
- Type appropriate dollar amount for Maximum Labor.
- Type appropriate dollar amount for Maximum Materials if applicable.
- Click on **checkbox** labeled **“Request New Service Date & Time”**.
- Click on **radio button** labeled either **“Specified Date”** OR **“Date Range”**.
- Click on button to display calendar.
- Click on appropriate date choice, repeat Step f and Step g if you choose **“Date Range”**.

Note: If you select Specified Date, time selections will also display.

- Click on **drop down arrow** next to time.
- Scroll down and click on appropriate time choice, repeat Step h and Step i to select start and finish time.
- Copy and paste Completed Bid Proposal Template from Step 11 in Comments Box.
- Click in **checkbox** labeled **“I accept the Terms & Conditions”**.
- Click on button.



- m. Summary tab will open and "Bid Submitted" message will display.
- n. Scroll down on Summary tab to **Service Order Bids** section and your **Bid Information** will display.
- o. In Service Order Bids section, New Service Date Request will also display.

- p. If you are awarded Service Order, it will be located in **Accepted** tab OR **Today** tab in Active status if Bid is Accepted while within Service Window
- q. If you are NOT awarded Service Order, it will no longer appear in Bid Requests tab and you will not see Service Order anywhere.

17. Change Bid

- You might decide you want to Change Bid after you submit.
 - a. Click on Bid Requests link on dashboard or Service Order Monitor, then Bid Requests tab.
 - b. Service Orders you have Placed a Bid on will display.
 - c. Locate Service Order you want to Change Bid for, click on **CHANGE BID** button.
 - d. Complete Service Order Bid as described in Step 13, 14 or 15 earlier in this lesson.

18. Reject Service Order:

- You should Reject Service Order if you are not interested in Placing a Bid.

Note: Once Provider has Rejected Service Order, you cannot change your mind and Place a Bid unless Buyer re-routes the same Service Order. You cannot view that Service Order anywhere, but if you are still interested contact Sears Facilities Administrative Team for further assistance.

- When Service Order is open (Refer to Steps 3g & 3h for how to open Service Order), locate **Service Order Bid** on right side of screen.
- Click on **REJECT SERVICE ORDER** button.

Service Order Bid

An asterisk (*) indicates a required field

Fixed Price Hourly Rate

Maximum Labor:* \$ 0.00

Maximum Materials:* \$ 0.00

Total Bid: \$

Bid Expires: 12/4/13

Change Bid Expiration

Request New Service Date & Time

Comments with Bid:*

I accept the [Terms and Conditions*](#)

This estimate will be visible by all providers selected for the project.

- Reject Service Order** pop-up screen will display.
- Click on **drop down arrow** labeled **“Reason Codes”**.
- Scroll down and click on appropriate Reason Code choice.
- IMPORTANT: Confirmation pop-up screen will NOT display, click on **Cancel** button if you change your mind and do NOT want to Reject Service Order.
- Click on **REJECT** button.

Reject Service Order

An asterisk (*) indicates a required field.

Select a reason for rejecting the service order.*

Reason Code

Schedule conflict

Cancel

REJECT

Select Code

- Spend limit too low
- Spend limit does not match scope
- Service scope is unclear
- Service location too far
- Schedule conflict
- Other