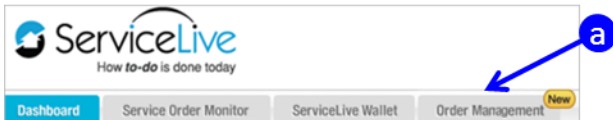


This lesson explains process to Place a Bid on a Service Order. All “Bid Requests” Service Order opportunities display on Respond link until they Expire **OR** Service Order is awarded to a Provider Firm. You can Place a Bid, Place a Bid and Change Bid Expiration, Place a Bid and Request New Service Date & Time 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 (Respond link) **OR** during Bid process (Respond link).

1. When you login to ServiceLive, the **Dashboard** page will open.
2. Navigate to **Respond** link:
 - a. Click on **Order Management** tab.



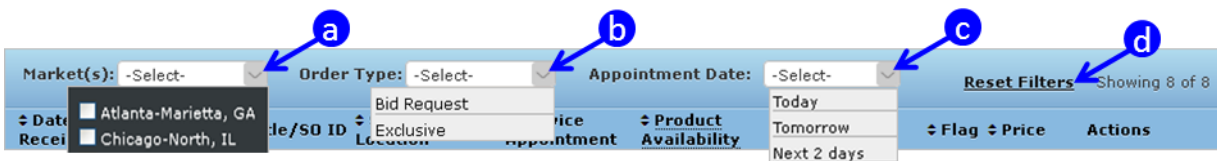
- b. Click on the **Respond** link from left navigation panel.
- c. Indicates the number of Service Orders that require action on **Respond** link.



3. Search Filters available on **Respond** link:

Note: This section explains how you can search and locate information on **Respond** link. You may select any one filter or multiple filters to narrow your search. All filters default to **Select**.

- a. Market(s) Filter = Click on **drop down arrow** to display geographical **Market** filter choices. Click on appropriate market(s), then click outside of **Market** filter and Service Orders within the market selected will display.
- b. Order Type Filter = Click on **drop down arrow** to display **Order Type** filter choices. Click on appropriate Service Order Status. Service Orders containing selected Status will display.
 - **Exclusive** Filter displays CAR (Conditionally Auto Routed) Service Orders.
 - **Bid Request** Filter displays Service Orders that are open for Bids.
- c. Appointment Date Filter = Click on **drop down arrow** to display Service Order **Appointment Date** filter choices. Click on appropriate Service Order Appointment Date. Service Orders containing selected Appointment Dates will display.
- d. To clear filter selections, click on **Reset Filters** link.

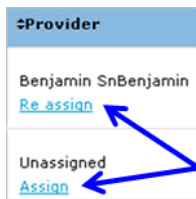


4. Information categorically displayed within [Respond](#) link:

Note: Service Orders display most current to oldest. Clicking on the button in front of text (i.e. Service Location) in Title bar, allows you to change the displayed sort order or the grouping of Service Orders.

- a. Date Received = Date a Service Order was received.
- b. Order Type = Exclusive verses General
 - Exclusive Filter displays CAR (Conditionally Auto Routed) Service Orders.
 - Bid Request Filter displays Service Orders that are open for Bids.
- c. Title/SO ID = Service Order information, which includes Title (Name) entered for Service Order and Service Order #.
- d. Service Location = City, State, and Zip Code for Service Order visit.
- e. Service Appointment = Date and Time Service Order is scheduled.
- f. Product Availability = Company Name, Address and Time for product pick up (if applicable).
- g. Provider(s) = Name of Service Provider that Service Order is routed to **OR** if there are multiple Service Provider in Provider Firm who are part of routing list. This will display as # Providers, or as Unassigned.

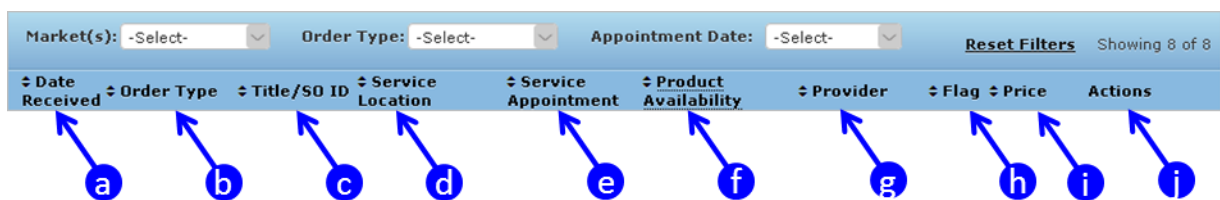
Note: You can choose to assign or reassign a Service Provider to Orders at any time by clicking on the [Assign](#) or the [Re assign](#) links listed under **Provider** category in Title bar and selecting Provider.




h. Flag = A visual reminder to follow up on Service Order in some way.

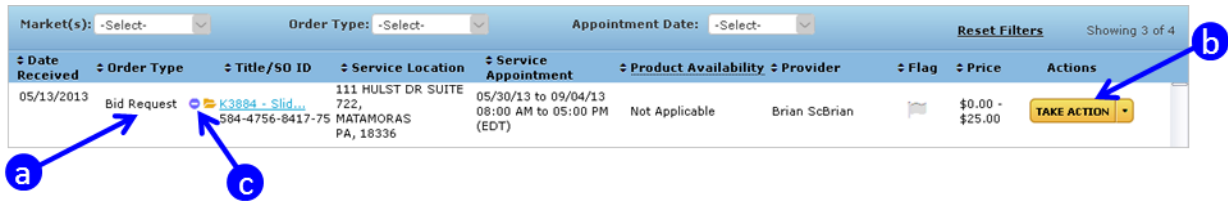
Note: Click on flag symbol to highlight the Service Order and again to de-flag a Service Order. When a Service Order is flagged, the flag will display as red.

- i. Price = Maximum price determined by Buyer. You can Counter Offer price if allowed.
- j. Action = Displays next action needed in lifecycle of Service Order.

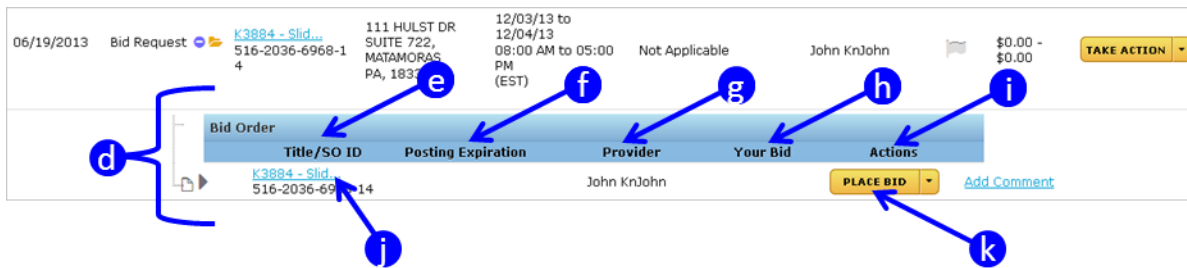


5. Bid Requests Service Orders:

- a. A Bid Request Service Order is indicated under **Order Type** column header.
- b. Click on **TAKE ACTION** button to review Bid Request details and take action.
- c. **OR** click on the  symbol next to the Service Order Title link.



- d. The line below Service Order will expand.
- e. Title/SO ID = Service Order information, which includes Title (Name) entered for Service Order and Service Order #.
- f. Posting Expiration = Expiration Date Firm establishes when submitting Bid Request Service Orders.
- g. Provider(s) = Name of Service Provider that Service Order is routed to **OR** if there are multiple Service Provider in Provider Firm who are part of routing list. This will display as # Providers, or as Unassigned.
- h. Your Bid = Displays Bid you submitted for Service Order. If you have not placed a bid yet, this will be blank.
- i. Actions = Displays next action needed in lifecycle of Service Order.
- j. Click on the Service Order Title link to view Service Order details and to Place Bid.
- k. **OR** click on **PLACE BID** button.



Continue to next page

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.

7. Summary tab - General Information section:

- a. Appointment Date = Date and Time Buyer has requested Service Order to be completed.
- b. Location = City, State, and Zip Code for Service visit.
- c. Google Directions = Link to Google map from 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.

8. Summary tab - Scope of Work section:

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

9. Summary Tab – Service Order Bids section:

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

▶ General Information
▶ Scope of work
▼ Service Order Bids
Total Bids: 0 Add your bid using the form on the right.

b. This is information that will display AFTER Provider Places a Bid.

▶ General Information
▶ Scope of work
▼ Service Order Bids
Total Bids: 1 Range: \$100.00 - \$100.00

Your bid: 06/21/13 10:01 AM	Expires: 12/04/13 12:00 AM	\$100.00
Hourly Rate:	N/A	
Estimated Time to Complete:	N/A	
Total Labor:	\$50.00	
Materials Estimate:	\$50.00	
Total Job Cost:	\$100.00	

This is a test!

Continue to next page

10. Summary Tab – Comments section:

- Comments are available for Providers and Buyers to communicate about the Service Order, ask questions or share information.

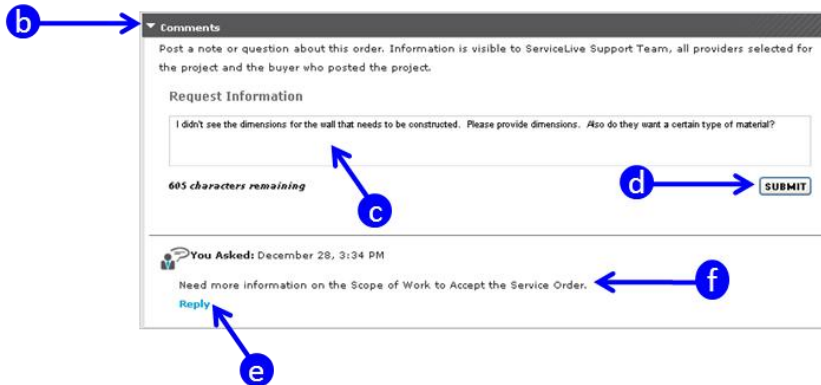
Note: Be aware that sharing contact information, names, etc. at this stage violates the Terms and Conditions of the marketplace.

- Buyer and all Providers that receive Service Order 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 (Respond Link) **OR** during Bid process.

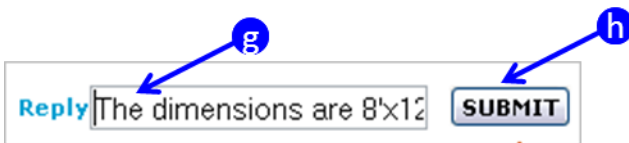
- Access Comments section from main **Respond** link page by clicking on the add **Add Comment** link next to **PLACE BID** button and scroll down to Comments section.



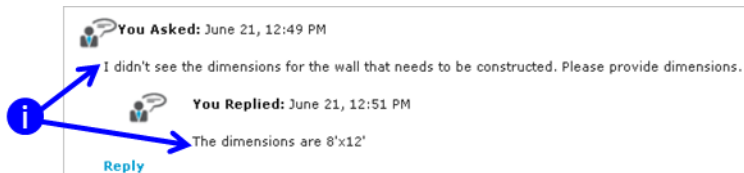
- AND/OR** scroll down to Comments section.
- To Add Comment, type Comment in box.
- Click on **SUBMIT** button.
- To View Comment, scroll down in Comments section.
- To Reply to Comment from another Provider or Buyer, click on **Reply** link.



- Type appropriate reply or ask question in box.
- Click on **SUBMIT** button.



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



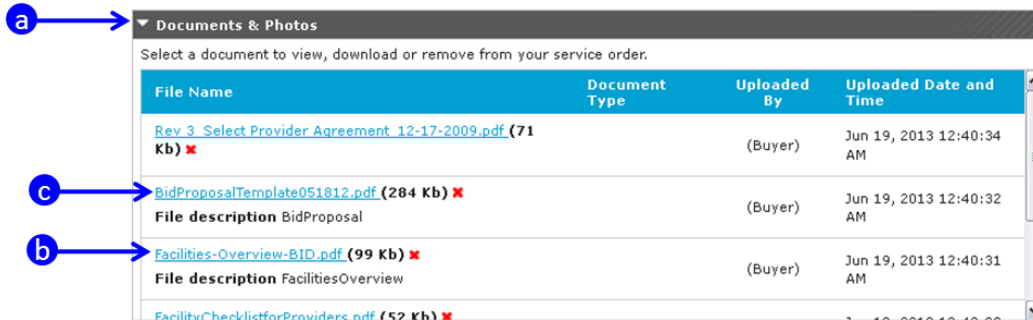
11. Summary Tab – Documents & Photos section:

- a. Scroll down past Contact Information section to Documents & Photos section.
- b. Save and/or Print Facilities-Overview-BID document.

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

- c. Save and/or Print Bid Proposal Template document to be used in Step 13 in this lesson.

Note: For instructions on how to save and/or print documents, refer to **Print Paperwork** lesson in **Order Management** course.



12. Summary Tab – Parts section:

- a. Review to identify if there are Parts 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 11 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 # 123-4567-1234-11

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.

Continue to next page

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.

Service Order Bid

An asterisk (*) indicates a required field

Fixed Price Hourly Rate

Maximum Labor:* \$ 1300.00

Maximum Materials:* \$ 200.00

Total Bid: \$ 200.00

- d. **OR** click on radio button labeled **“Hourly Rate”**.
- e. Type appropriate dollar amount for Hourly Rate.
- f. Type appropriate amount for Maximum Hours.
- g. Type appropriate dollar amount for Maximum Materials if applicable.

Service Order Bid

An asterisk (*) indicates a required field

Fixed Price Hourly Rate

Hourly Rate*

\$ 22.00 maximum hours 40

Maximum Labor: \$ 880.00

Maximum Materials:* \$ 200.00

Total Bid: \$ 1080.00

- h. Copy Completed Bid Proposal Template from Step 12 in **Comments with Bid** box.
- i. Click in checkbox in labeled **“I accept the Terms & Conditions”**.
- j. Click on button.

Service Order Bid

An asterisk (*) indicates a required field

Fixed Price Hourly Rate

Maximum Labor:* \$ 1300.00

Maximum Materials:* \$ 1000.00

Total Bid: \$ 2300.00

Bid Expires: 2/5/12

Change Bid Expiration

Request New Service Date & Time

Comments with Bid:*

This quote includes:
the removal of an
existing set of 6/0 x
7/0 double action doors

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

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



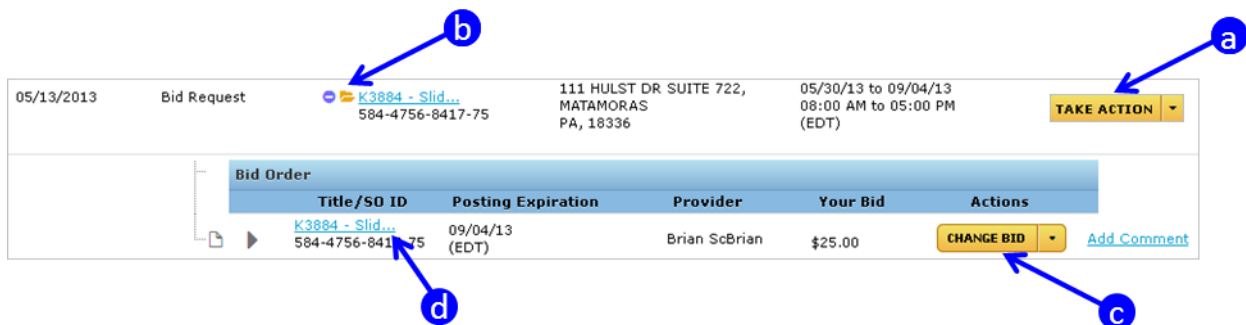
- m. If you are awarded Service Order, it will be located in **Schedule** link.
- n. If you are NOT awarded Service Order, it will be removed from your ServiceLive System.

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 decreasing Bid date Buyer might not have opportunity to evaluate your Bid.
- Once your Bid expires you are not in running for Service Order opportunity.

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

- a. From main **Respond** link page, click on **TAKE ACTION** button.
- b. **OR** click on button.
- c. In expanded section, click on **CHANGE BID** button.
- d. **OR** click Service Order title link.



- e. Click radio button labeled **“Fixed Price”** on **Service Order Bid** on right side of screen.
- f. Type appropriate dollar amount for Maximum Labor.
- g. Type appropriate dollar amount for Maximum Materials if applicable.

Service Order Bid

An asterisk (*) indicates a required field

Fixed Price Hourly Rate

Maximum Labor:* \$ 1300.00

Maximum Materials:* \$ 200.00

Total Bid: \$ 200.00

- h. **OR** click on radio button labeled **“Hourly Rate”**.
- i. Type appropriate dollar amount for Hourly Rate.
- j. Type appropriate amount for Maximum Hours.
- k. Type appropriate dollar amount for Maximum Materials if applicable.

Service Order Bid

An asterisk (*) indicates a required field

Fixed Price Hourly Rate

Hourly Rate*


\$ 22.00 maximum hours 40

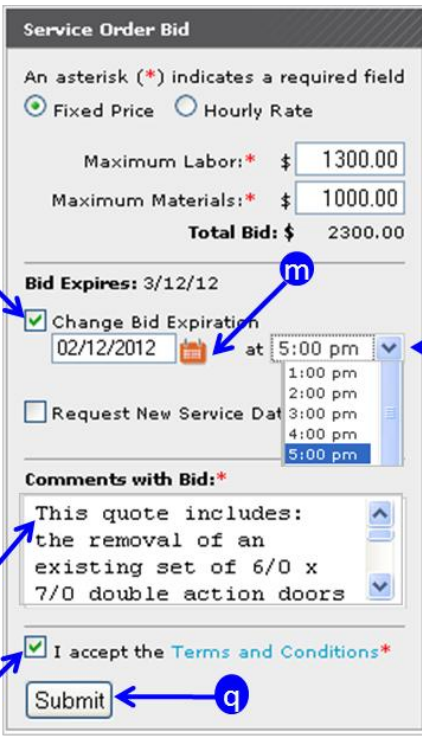
Maximum Labor: \$ 880.00

Maximum Materials:* \$ 200.00

Total Bid: \$ 1080.00

Continue to next page

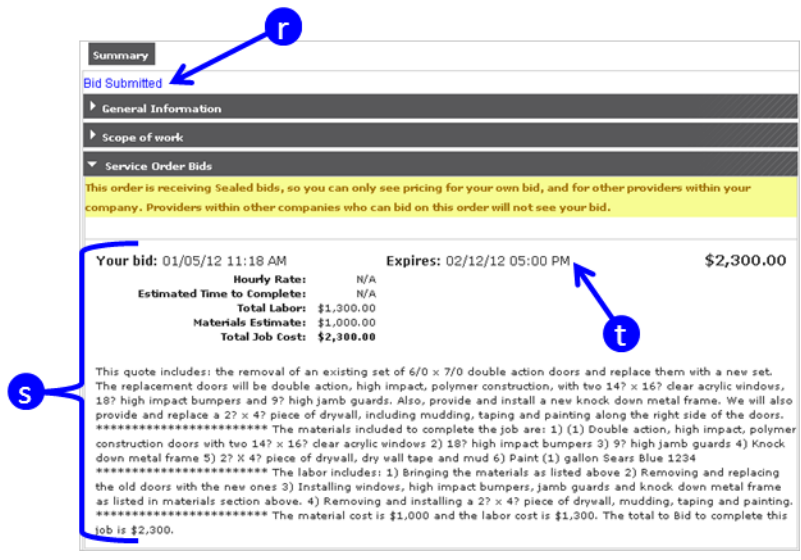
- l. Click on checkbox labeled **“Change Bid Expiration”**.
- m. Click on  button to display calendar and select appropriate choice.
- n. Click on **drop down arrow** next to time and select appropriate choice.
- o. Copy Completed Bid Proposal Template from Step 13 and paste in Comments Box.
- p. Click in checkbox labeled **“I accept the Terms & Conditions”**.
- q. Click on button.



The screenshot shows the 'Service Order Bid' form. At the top, it indicates that an asterisk (*) denotes a required field. The form is set to 'Fixed Price' and shows a total bid of \$2300.00, composed of \$1300.00 for labor and \$1000.00 for materials. The bid expires on 3/12/12. A callout 'l' points to the 'Change Bid Expiration' checkbox, which is checked. Callout 'm' points to the calendar icon next to the expiration date field. Callout 'n' points to the dropdown menu for the expiration time, which is currently set to 5:00 pm. Callout 'o' points to the text area for 'Comments with Bid', which contains the text: 'This quote includes: the removal of an existing set of 6/0 x 7/0 double action doors'. Callout 'p' points to the 'I accept the Terms and Conditions' checkbox, which is checked. Callout 'q' points to the 'Submit' button at the bottom of the form.

Continue to next page

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



- u. If you are awarded Service Order, it will be located in **Schedule** link.
- v. If you are NOT awarded Service Order, it will be removed from your ServiceLive System.

Continue to next page

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 the 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.

Service Order Bid

An asterisk (*) indicates a required field

Fixed Price Hourly Rate

Maximum Labor:* \$ 1300.00

Maximum Materials:* \$ 200.00

Total Bid: \$ 200.00

- OR click on radio button labeled **“Hourly Rate”**.
- Type appropriate dollar amount for Hourly Rate.
- Type appropriate amount for Maximum Hours.
- Type appropriate dollar amount for Maximum Materials if applicable.

Service Order Bid

An asterisk (*) indicates a required field

Fixed Price Hourly Rate

Hourly Rate*



\$ 22.00 maximum hours 40

Maximum Labor: \$ 880.00

Maximum Materials:* \$ 200.00

Total Bid: \$ 1080.00

Continue to next page

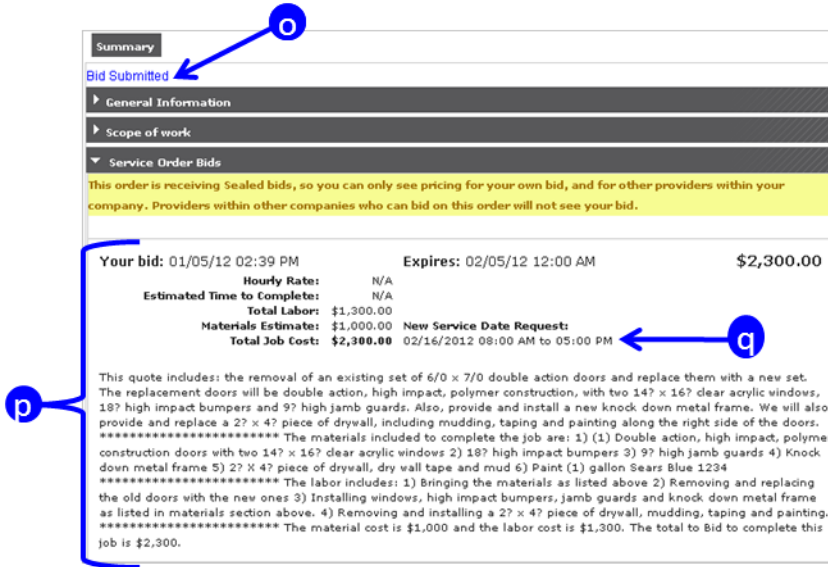
- h. Click on checkbox labeled **“Request New Service Date & Time”**.
- i. Click on radio button labeled either **“Specified Date”** OR **“Range”**.
- j. Click on  button to display calendar and select appropriate choice.
Note: Click on second  button to select end date if you choose **“Range”**.
- k. Click on **drop down arrow** next to time and select appropriate choice
Note: Click on second **drop down arrow** next to time and select end time if you choose **“Range”**.
- l. Copy Completed Bid Proposal Template from Step 12 in Comments Box.
- m. Click in checkbox labeled **“I accept the Terms & Conditions”**.
- n. Click on button.

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

- h**: Points to the checkbox labeled 'Request New Service Date & Time'.
- i**: Points to the radio button labeled 'Specified Date'.
- j**: Points to the calendar icon button next to the date field.
- k**: Points to the dropdown arrow next to the time field.
- l**: Points to the text area containing the bid proposal template: 'This quote includes: the removal of an existing set of 6/0 x 7/0 double action doors'.
- m**: Points to the checkbox labeled 'I accept the Terms and Conditions'.
- n**: Points to the 'Submit' button.

Continue to next page

- o. Summary tab will open and “Bid Submitted” message will display.
- p. Scroll down on Summary tab to Service Order Bids section and your Bid Information will display.
- q. In Service Order Bids section, New Service Date Request will also display.



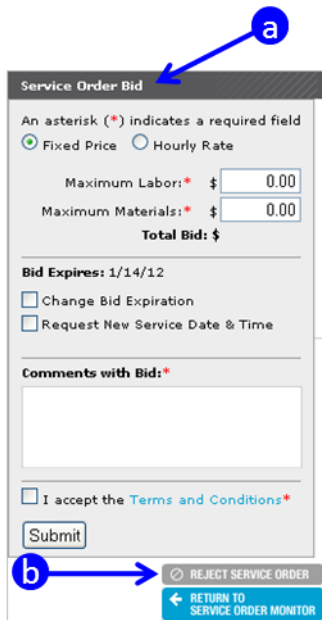
- r. If you are awarded Service Order, it will be located in [Schedule](#) link.
- s. If you are NOT awarded Service Order, it will be removed from your system.

17. 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. Once you Reject a Service Order, it is removed from your system.

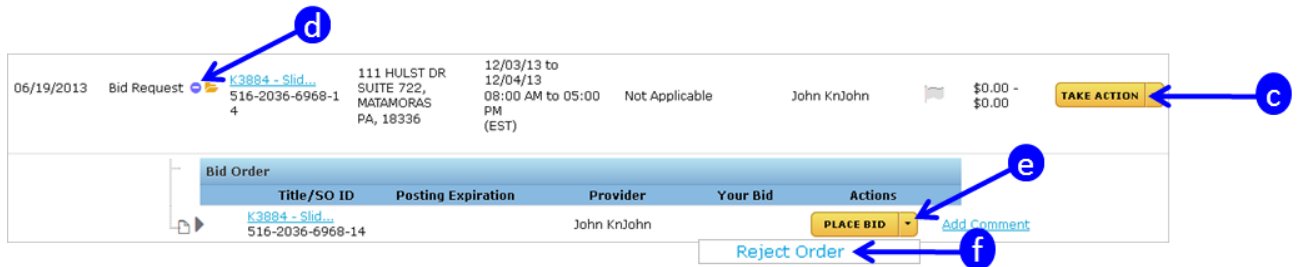
- a. When Service Order is open, locate Service Order Bid on right side of screen.
- b. Click on button.



- c. **OR** Reject a Service Order from main **Respond** link page, click on **TAKE ACTION** button.
- d. **OR** click on the symbol next to the Service Order title link.
- e. Click on **drop down arrow** labeled **PLACE BID**.

Note: If you have **Placed a Bid** on a Service Order, instead of the **PLACE BID** button, you will click on the **drop down arrow** labeled **CHANGE BID**.

- f. Click on **Reject Order** link.



- g. Reject Service Order Screen will display.
- h. Click on **drop down arrow** labeled **“Reason Codes”**.
- i. Scroll down and select appropriate Reason Code choice.
Note: Click on cancel button if you change your mind and do NOT want to Reject Service Order.
- j. Click on **REJECT** button.



Note: If you Reject Service Order from Respond link, a message will appear at top of screen to confirm Service Order Rejection. **Service order rejected successfully** Otherwise you will not receive a confirmation message.

- k. Service Order will automatically be removed from your ServiceLive system.