

HDMS Online-Only Product Installation Instructions

In **rare** situations when a customer wants online-only product installed, HDMS is able to measure the customer site, but the product quantities must be calculated and the install quote must be built and sold by the D23 Associate.

***Tax: installed product tax rules can not be accommodated for any online product installation due to the ordering process.*

1. Create a Measure with a “like product” (similar SF/SY profile to the online only product)
2. Add “Online Product” in the Closing Notes on the Measure Appointment page
3. Take payment for the Measure
4. Log into the HDMS system (immediately)
5. Create a Feedback for the measure number flagging an online only product
 - **Feedback Note:** Measure is for online product
6. When the Measure is completed, HDMS will create a simple Quote from the measurements and hand off to the store (this will include the “like product”)
7. D23 Associate will then review Measure and Quote and update the ESVS installation Quote
 - Remove “like product” item from the ESVS Quote
 - Add online-only product details to the Install Special Instructions (product type, model number, SF/SY per box etc) for the installer to be able to prepare
8. D23 Associate will contact customer to place online order and take payment for ESVS install Quote
9. Once sold, D23 Associate will contact the installer with the details of the online-only product and expected delivery date

