



RUN YOUR CONTRACTING BUSINESS WITH LESS STRESS AND MORE SUCCESS®

The 7-Power Contractor Company CSR-Dispatcher-Tech Manual Sampler

Before we get started:

1. This sampler is a very small portion (think tip of the iceberg) of each of the 3 key manuals that fix companies the fastest and those manuals or what we call The Triangle of Communication are:
 1. The Customer Service Representative
 2. The Dispatcher
 3. The Technician

Note: We have over 30 manuals at The 7-Power Contractor that pretty much covers 80% of what goes on in every box on the Organizational Chart that any contracting company needs.

2. A brief overview and definition:
 - a. The Customer Service Representative (aka CSR) is who answer the phone and acts like the happy hostess at a restaurant that makes sure you feel welcome and gets your experience off to the best start possible by:
 1. Making it sound like you didn't interrupt their day with your call
 2. They show empathy
 3. They listen intently and make sure they got all the pertinent information correctly
 4. Let them know that when the "great" Tech shows up things will get better for them
 5. They explain anything they, the customer, needs to know before the Tech reaches the door
 6. The book the call
 - b. The Dispatcher is best if it's a separate position since it's a different mindset and skill set than a CSR. At small companies, this may be tough to do. So, they must learn to answer a call only as a CSR and when they hang up they magically transform into a Dispatcher who:
 1. Adjust the schedule
 2. Keeps the customer in the loop as the day progresses
 3. Monitors where all the Techs are at any given time during the day
 4. Seeks to match skill set to the call at hand to the Techs available



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5. Maximize billable hour efficiency and minimize drive time and other areas that effect profitability
 6. They make sure the Tech has all they need in the way of information to successfully run the call the right way
- c. The Technician is prepared if they have great communication, operational and technical skills. They do the following:
1. Arrive on time
 2. Come to the door the right way
 3. Ask key questions and prove they're listening
 4. Proceed through the call and attend to what they were called to do and anything else they should be looking at that is in the customer's best interest
 5. When they finish the call, they make sure they complete the call with the Dispatcher so there are no loose ends

Other Considerations:

The Customized Operating Power! manuals are meant to serve as a custom guide for your company. However, the author takes no responsibility for compliance with the laws or regulations that govern your specific business or where you operate your business. Before you develop your own policies and procedure manuals, check with your own trusted business advisers, including your own attorney, to make certain that your policies and procedures comply with all relevant laws, customs and regulations.



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Customer Service Representative (CSR) Manual – (Company Name):

General Job Responsibility:

- Answer telephone and schedule incoming service calls

Note: One CSR should be able to answer and schedule 300 to 500 calls per week

- Answer website scheduling requests
- Track Advertising Sources
- Customer follow-up calls
- Various marketing efforts

What the Company Expects:

CSR Representatives are on the front line of our company. Everything you do (or don't do) either helps or hurts the Technician's ability to service the customer. The first steps in performing a service call rests with you. Your ability to schedule service calls is essential to our success.

To help you succeed at this position we've created this CSR manual which details your areas of responsibility and the steps involved in performing your job. This manual represents the official "Zoom Way of Getting the Job Done." The tasks, procedures and the responsibilities in this manual are what you will be held accountable to learn and perform. "Do what's in the book and you're off the hook!"

Service Techs Defined:

When this manual says Techs or Technicians is referring to our Service Techs.



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Overview:

First impressions are important. The CSRs are on the front line of “first impressions” for our company. Everything you do (or don’t do) during the call either helps or hurts the Service Tech’s ability to close the sale. To help, we’ve created a very intensive CSR training program and this very detailed manual.

A CSR is expected to:

- Attend a 1-day in-house CSR training course within the first year.
- Attend the Weekly Meetings for Office Personnel.

Note: For quality assurance, all phone calls are recorded.

The 9 ways the CSR impacts the company:

1. You directly affect our ability to win calls on the phones
2. You can be the single most important factor in our success, especially during Slow Periods.
3. Efficiency starts with the CSR
4. Without successful CSR’s we cannot win the game!
5. The customer’s first impression of the company starts with the CSR
6. Salesmanship, Efficiency and Conversion Rates start with our CSR’s
7. Great service begins when the telephone rings.
8. You can be the difference between our Techs winning or losing the call.
Everything you do or don’t do either hurts or helps the Techs ability to close the sale.
9. Exceed the level of expectations for the customer.

The value of the call:

Every call has the potential of an \$500.00 sale if the Service Tech closes the sale.

This is the reason why it is important to book every right call. The amount of calls we book on the schedule affects all of us at (Company Name). The total amount of booked calls on the schedule will affect the following:

- The total amount of Service Techs the company can hire and retain.
- The total amount of Apprentices we hire and retain.
- The total amount of office staff needed to run the operation.
- The cost of attracting each customer. Better put, it affects the profits we make, which help us through the slow months.



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Every time you book another call, you are securing the jobs of all of us here at (Company Name). CSRs are the lifeline of our company. **Yes, I said lifeline.** Without booked calls, we can't be in business.

Be the best you can be on every call

Anyone can answer the phone and gather information. Great call takers do much more than entering info. What does it take to be a great call taker?

- CSRs connect with every customer.
- CSRs show empathy to the customer's situation.
- CSRs reassure the customer that everything will be okay once the tech arrives.
- CSRs explain the easy (Company Name) Upfront Pricing system.
- CSRs brag about our Techs.
- CSRs overcome Minimum Service Fee objections.
- CSRs never blow off a call.
- CSRs handle problems within their responsibilities.

Characteristics of a great "CSR"

#1 **Be Curious**

Ask questions! Anyone can answer the phone, gather information, and enter data in the computer and transfer calls.

#2 **Bring Yourself to the Party!**

Bring out your personality on the phone! If you don't have one, make one today. The tone of your voice should be upbeat and a higher pitch than your normal voice. Nobody wants to deal with a "Monotone" CSR.

#3 **Have a Clear, Distinct Voice**

Speak clearly and loud enough to be heard by someone around the corner. A soft voice conveys that you're weak, lack confidence and worse, you might sound like you're trying to hide something!

#4 **Have Patience**

CSRs usually have the most down time in the company. What's the rush? Invest in your customers. Yes, your customers! The people you talk to are just as much your customers as they are the Service Techs customers.

#5 **Details, Details, Details!!!!**



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You can never be too detailed oriented as a CSR! When you answer a call, you should know the following, who, what, where, when, and how before telling or transferring the call.

#6 Be Personable and Empathic

Find something in common with the customer. Use it in your conversation. Use phrases like:

“We have highly skilled Service Techs”

“Don’t worry, when our Service Tech arrives, he’ll take care of everything!”

“Have a good day!”

NOTE: Whenever possible, try to use their first name unless they give their name as Mr., Mrs., Ms. or Dr. then use that title.

#7 Listen, no I mean really Listen

Listen closely to the customer’s name. You should use it during the conversation as much as possible. Slow down! Ask questions and listen to the responses. The trick is to get them talking and to avoid whenever possible cutting them off.

Dispatcher Manual for (Company Name):

The Role of the Dispatcher [also known as a DSR] and What the Company Expects:

Overview:

The Customer Service Representatives (aka CSRs) have worked hard to get the call booked. Everything you do (or don’t do) now either helps or hurts the Technician’s ability to be productive. To help, we’ve created a very intensive Dispatcher training program and this very detailed manual.

General Job Responsibility:

It is up to the Dispatcher to know where all the Technicians and Apprentices are throughout the day. The Dispatcher keeps track of all incoming service calls by "priority"



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[see priority dispatch] to the available work force. This allows us to maximize our efforts. In addition, the dispatcher must be aware that if over booking occurs, that he reschedules based upon the "priority" section of this manual. The Dispatcher is responsible for calling the customer when the technician is on the way to their home. It's also the Dispatcher's job to update those who are waiting for service.

Tools available to accomplish your job:

The dispatcher has the following tools to get the job done:

- 1) Telephone
- 2) Smart phone
- 3) (Your Software) dispatch program
- 4) GPS program
- 5) This Policy and Procedures Manual

Dispatcher Authority:

The Dispatcher has the authority for assigning what jobs will be done by which Technicians. The Dispatcher, Service Manager, Sales Manager, Field Supervisors and System Advisors should work as a team. If a Technician or Apprentice is disobeying the rules, the Dispatcher is to bring it to the attention of the Service Manager, Sales Manager, Supervisor, or Owner for appropriate disciplinary action.

Taking a 30-minute Lunch Break and other Scheduled Breaks:

Dispatching is a stressful job, and with that in mind, we require you to take your 30-minute lunch break your 15-minute morning break and your 15-minute afternoon break. This is done on a rotational basis with other staff so that there is always someone to cover the phones and dispatching. Make sure before you leave for lunch that the person who is relieving you, is made aware of the status of the Technicians and pending Dispatches.



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Dispatching and Completion of a Call:

Overview of Dispatching calls to Technicians:

Whenever possible, The Company tries to pre-book no more than three of the four call slots for any Specific Technician during any one day time period. Normally, we'll book the first, third and fourth call slot and leave the second slot open for any callbacks or new business that comes in. The exception is during extreme conditions (check with a supervisor first).

As a call is completed, the next call assigned to that Technician will be given to him. Keep one additional call set up for a Technician until he either tells you he will be tied up for the rest of the day or it gets within two hours of his end of shift. At that time calls will be shifted to the Technicians who are working late or to the Technicians who are authorized to work overtime.

The Dispatcher will dispatch a call from the dispatch computer screen by considering the urgency of the call, the location of the job, tech availability and skill level.

The Technician is to notify the Dispatcher by cell phone when he is on the way to the call and when they arrive on the job.

It is the responsibility of the Technician to call by cell phone once he has been able to diagnose the problem, quote a price and received customer approval for the work. Dispatch is to be informed of an approximate time frame for the work to be done. This allows the Dispatchers to better adjust scheduling of calls and to update customers who are waiting.

If the Technician has not called within 30 minutes of arrival, unless this is an installation already sold and now being done, the Dispatcher is expected to contact the Technician by cell phone or text message for a time and progress update.

Note: Specific Information is Available in this Manual under "Working with Technicians"



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Order of Dispatching Service Calls:

Service calls are typically dispatched in the following order by the Dispatcher:

1. Area: This means based on what area the tech is in or who is closest to the job
2. Priority: This means using the priority call section of this manual
3. Time: This means based on the time or window promised

Note: Only the Service Manager has the authority to override this order

Priority Calls:

This is the general order of importance:

First Priority Calls:

For Plumbing:

1. Gas Leaks
2. Flooding [either water or sewerage]
3. Water Leaks that are causing severe damage
4. No Water
5. No Hot Water

For Heating:

1. Carbon Monoxide alarm has sounded

Note: Tell the customer to leave the home and call the local fire department

2. Burning smell or smoke

Note: Tell the customer to leave the home and call the local fire department

3. Water leak that is causing flooding or damage
4. No heat at all

For Air Conditioning:

1. Water Leaks that are causing damage
2. No cooling at all
3. Burning smell or smoke



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Note: Tell the customer to leave the home and call the local fire Department

For Electrical:

1. No Electricity
2. Smoke or sparking

Second Priority Calls:

1. Callbacks
2. (Special Name) Planned Maintenance Club members
3. Existing Customers
4. New Customers

Technician Manual- (Company Name):

Technician General Work Description:

When this manual says, “Technician” or “Tech” it means both a Service Technician and an Installer. If it says, “Service Technician” or “Service Tech” it refers only to them. And when it says, “Installer” it is meant to apply to an Installer only.

Note: Your job description is always changing. It changes each time the manuals you have change and expect that they’ll be changing regularly. We value your input and during our regular Operation Manual meetings we seek out your input as we continually improve the manuals to improve our performance. The manuals provide much greater detail than bullets ever could. It’s in your best interest and (Company Name) that you learn the manuals you have very well.

Transportation to Work:

Technicians are allowed to use the (Company Name) vehicle to and from work and from work and home.

Note: The vehicle must be parked in a legal and safe environment and the company reserves the right to inspect the location and if the company deems it to not be up to standards alternate arrangements must be made



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if the vehicle benefit is forfeited

All employees at (Company Name) are required to have a valid (State You Operate In) Driver's Certificate. Any traffic offenses are to be brought to the attention of the Service Manager, whether they occur in a personal or company vehicle. (Company Name) needs to know this information for company auto insurance purposes only.

Weekly Meeting:

Before attending any company meeting, all Techs are expected to have restocked their vehicles, turned any necessary paperwork and are completely ready to start their day at the completion of the specific meeting they're going to attend.

Every Wednesday morning there is a Service Technician ONLY Meeting that begin at 7:00 AM sharp and runs till 8:00 AM. The company purposely avoids booking calls before 8:30 AM for Service Techs on Wednesday mornings unless expressly approved by the Owner.

Every Friday morning there is an Installers ONLY Meeting that begins at 7:00 AM sharp and runs till 8:00 AM. Customers are advised by the company that Installers will be arriving at their home by 8:30 AM on Fridays.

Note: Apprentices are expected to be preparing the vehicles and staging the materials as directed by the Warehouse Manager, Install Manager or Service Manager to maximize our company efficiency.

You're expected to be at your meeting unless you receive a memo or notice from the Dispatcher that the meeting is cancelled or changed. The Depth Chart you have from (Company Name) that you're to keep with your Operating Manuals determines which meeting or meetings you're expected to attend.

Note: Your attendance is required. Be aware (Company Name) is paying for you to attend this meeting. And, you're expected on time.

Any employee who doesn't report that they'll be late will be asked to sit out the meeting and will meet with the Service Manager or Install Manager right after the meeting for disciplinary action.

The first offense will result in a verbal reprimand, the second offense will be a written reprimand, the third offense will be a one-day suspension without pay and the fourth offense will result in a three-day suspension.



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Be aware, whether or not you attend the meeting, you're still responsible for knowing the material that was covered in the meeting.

Time Off:

"Time off request forms" are the only acceptable way to schedule time off. These completed forms are to be left with the Accounting Department at least one month prior to the time you desire to take Time Off.

Time off will be granted or denied based on what's in the best interest of the company. Then, it's on a first come first serve basis.

Example: If two people want the same day off and the company needs at least one of those people to cover the workload, the first request received will be granted permission, the second will be denied.

Verbal requests or authorization are not acceptable. The appropriate Manager will sign the request form with his decision and leave a copy in your personal mailbox. And the Manager will leave the approved form for the Dispatcher to insert the vacation dates into the software.

See the Employer- Employee Manual for more detailed information.

(Company Name) hires only the most willing and eager people that want to be part of a growing success. New hires are only allowed one excused absence during their first 90-day initial employment period. Additional missed days may be grounds for dismissal.

Technicians have the flexibility to switch work days or on-call days with another Technician, provided they gain prior approval from the Service Manager or Install Manager that they most directly report to and the switch doesn't cause (Company Name) to have to pay overtime. See Employee Handbook for Details.

Attendance:

All Technicians are expected to adhere to the work schedule assigned to them.

If you are an Installer, you're expected to be at the shop at 7:30 AM to unload and then reload your truck in preparation for the day. Then, you're expected to be at the Customer's premise by 8:30 AM unless you're in the office for a scheduled meeting.

If you're a Service Tech you're expected to be knocking at the Customer's door at 8:00 AM unless you're in the office for a scheduled meeting.



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You are to contact your Manager at least 30 minutes before the starting time to report your absence or reason for being late. Do NOT leave a message with the answering service or with another employee. Contact your Manager directly. If the Manager does not answer, leave a voicemail message with a phone number you can be contacted at.

Note: The exception is when the Dispatcher notifies you on the prior day that there will be a different starting time or you're to start at the Customer's premises the next day.

If you're 9 hours of rest falls past your scheduled start time for the next day, leave the message on the Service Manager's voicemail what time you worked until, and what time the company can expect you in.

Excused absence or excused lateness will only be considered if the following applies:

- 1.) If you're 9 hours of rest falls past your scheduled start time for the next day and you notified the Manager that you will be late.
- 2.) You have notified the Manager before your starting time of the day you'll be late or missing work with the reason. It is up to the Manager to deem this a legitimate reason for being absent or late and who are not habitually absent or late.
- 3.) Employees who notify the Manager they have encountered an emergency.

Unexcused absences or lateness include the following:

- 1.) Consistently using "overslept" as an excuse.
- 2.) Habitual absences or tardiness.

Note: See your Employer-Employee Manual for further details

Absent or Late Policy:

We understand that certain circumstances may cause you to be delayed or absent without prior written consent. Therefore, the company will allow one late arrival or unscheduled and unexcused absence in a six-month period. On the second late arrival or unscheduled absence, the employee will be given a written reprimand. On the third unscheduled and unexcused absence or tardiness a second written reprimand will be given accompanied by a one-day suspension without pay. On the fourth late arrival or unscheduled absence, the employee will be subject to a three-day suspension without pay up to termination of employment.



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Any employee who is absent for more than two consecutive workdays due to illness, injury, or workman's compensation will be required to present a physician's statement upon returning to work that indicates they are fully capable of returning to their normal work duties as spelled in their manual.

Any employee who fails to report to work without notice on any workday will be considered to have voluntarily terminated employment effective at the close of business on that day, unless other arrangements have been made in writing and approved by the company management.

Work Clothes for Technicians, Procedures on How to Care for Them and General Grooming:

Our Mutual Goal: To provide guidelines and assistance on what is acceptable attire for work so that we project a professional image

Work Clothing Supplied:

(Company Name) supplies complete sets of uniforms (10 shirts and 10 pants), one company jacket, a company baseball cap (upon request) and disposable coveralls for each Technician. All employees are required to project a clean, professional image at all times in the customers' home and business, in public, and in and around the shop and office. Many prospective customers and employees enter the building, and first impressions are critical. All employees are required to wear their uniform to weekly meetings according to the standards set specifically for the meeting.

All uniforms are to be cleaned by the employee and maintained to our (Company Name) quality standards. Each employee will be required to have a photograph taken wearing the "perfect uniform," and each will be held accountable for their appearance.

Company Color Scheme: Navy, Red and Cream are (Company Name) color for clothing only unless otherwise specified

Company Logos: (Company Name) logo is to be on all clothing unless otherwise specified

Normal Footwear: Dark Oil resistant flat sole shoes that make a professional appearance.



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- Normal Pants:** For Technicians, you're required to keep Company issued pants laundered and free of stains or holes.
- Normal Shirts:** Only the short or long sleeve special button down (Company Name) logo shirts provided by (Company Name) are to be worn. All shirts are to be buttoned up except for the collar button and tucked into your pants. Only the (Company Name) tee shirts are to be worn at all times under your uniform shirt. Company issued Sweatshirts may be worn over the button-down shirts when the temperature falls below 60F
- Jackets and Coats:** Only the jackets and coats that (Company Name) provides with the Company Logo are permissible to wear out in the field and around the shop.
- Rain Coats:** (Company Name) does not provide any raincoats but does allow you to wear any color rain gear that has no logos on it. If you desire to have a logo on it, The Company will provide you with a logo patch that you may have professionally sewn on to the coat.
- Sweatshirts:** Only a (Company Name) logo sweatshirt may be worn in cold weather. You are responsible for keeping them clean.
- Frigid Weather Hats:** A (Company Name) logo knit cap is provided for you and it's the only hat permissible to wear in frigid weather.
- Hats:** Normal weather conditions wear the (Company Name) logo Baseball style cap we provide.
- Belts:** Black belts must be worn.

Special Notes:

You are solely responsible for maintenance of all uniforms provided by the company and for making sure they meet (Company Name)'s Quality Standards. If any of the provide uniform such as button up shirts or uniform pants articles become worn or damaged, they may be replaced at the company's sole discretion by completing a "damaged clothing" report form.



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If there is a pattern of abuse, The Company reserves the right to charge you our cost of replacement should the uniform company charge us.

(Company Name) will provide financial assistance in spreading out payments [similar to our tools program] should you desire additional company provided attire. [See: Service Manager for further details]

Technician's Responsibility for Maintaining the Company provided clothing:

The individual Technician will be responsible for replacing damaged clothing if they have been intentionally abused beyond being presentable. This decision will be made by your Supervisor. The cost of the garment will be charged back to the employee at our cost. Always keep one full set of uniforms in your vehicle for emergency. The replacement cost for uniform clothing is as follows:

Uniform shirt	\$32.75 each
Pants	\$42.00 each
Jacket	\$60.00 each
Sweatshirt	\$30.00 each

Your shoes are to be kept clean and presentable at all times. When shoes begin to wear out, they must be replaced.

A proper uniform is to be worn at all times, this means a uniform shirt and pants and it includes whenever you're driving in a (Company Name) vehicle. A blue or white (Company Name) tee shirt is acceptable under your uniform shirt.

You're never permitted to wear a (Company Name) tee shirt alone. You may wear a (Company Name) tee shirt only if you are installing as an example an attic air conditioning system or an extremely dirty task once you've already sold the tasks to the Customer.

Note: The only other exception to this policy is when the outside temperature is above 80F. Then, you're allowed to remove the uniform shirt if you're wearing a (Company Name) tee shirt and the work has been sold. Then, you must still put your uniform shirt on to finish the call with the customer.



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General Grooming and Personal Care:

It is (Company Name) goal to put our customers at ease and help them develop a feeling of confidence and trust in our Technicians, Apprentices and company. For that reason, we expect our Technicians and Apprentices to reflect an honest clean-cut image throughout your employment with (Company Name):

- Hair is to be kept neatly trimmed and closely cut in a conservative style
- Facial Hair is allowed, provided it is neatly trimmed [1/2" maximum length].

Note: That means all other areas of the face that don't have a traditional mustache, goatee or beard must be shaved daily including the neck area.

- Your face must be cleanly shaven when you arrive for work.
- Keep your hands clean and your finger nails trimmed and clean.
- Hand cleaner is provided for you in your vehicle. Keep hands clean for every call.
- Be aware of body odor. Keep deodorant in your vehicle in case you need it.
- Smokers should chew gum/spray cologne/body deodorant.
- It is recommended that you work with latex gloves or jersey gloves to keep hands clean and project a "clean" or tidy image to our customers.

Note: In the Plumbing, Heating, Cooling and Electrical Business, our professional image begins the process of establishing ourselves as professionals in the eyes of our customers

Jewelry:

Technicians may not wear jewelry while working that might be offensive or pose a potential hazard. No earrings or facial jewelry are permitted to be worn at any time. All chains and necklaces must be within the company shirt and not exposed at any time.

It's a recommended practice that jewelry not be worn due to the potential hazard in our profession.

Note: No facial or tongue piercing are allowed. If you currently have it you must remove the jewelry during your working hours.

Tattoos:

All tattoos must be concealed with clothing while working on the customer's property.

Note: Face, neck and hand tattoos are not acceptable while working for (Company Name).



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General Guidelines:

First impressions are important. Although the Customer has already been introduced to the Customer Service Representative [also known as the CSR] and the Dispatcher [also known as the DSR], you're the first person they'll actually meet from our company. You're on the front line and all of the Company's hard work up to this point now depends upon you. At this point, you're the single most important factor in our success.

Your ability to provide great service, your efficiency, your technical knowledge and your salesmanship determines whether we will win or lose. In other words, everything you do or don't do either helps or hurts the Company's efforts. All of us are counting on you!

To help you achieve great results, we've created this very detailed manual. The procedures and guidelines will navigate you through different service call types and assist you in providing the best options for the Customer.

General Procedure When Arriving at a Service Call or Job Site:

After receiving the job information from the Dispatcher and arriving at the job, the Tech follows this procedure:

Park your vehicle in the street in front of the Customer's property. The vehicle should be in plain view from the front door of the Customer's property.

Note: You should not park in the Customer's driveway unless you have asked permission to do so.

Wear your proper uniform and bring your diagnostic tool bag, and tablet with you to the front door. When the Customer answers the door, introduce yourself.

"Good Morning (Afternoon or Evening), I'm _____ from (Company Name), how's your day going so far?"

Instead of shaking the Customer's hand, hand them your business card while extending your right hand.

Before entering the door, inform the Customer that you need to put on your shoe covers to protect their flooring. Then proceed to place them over your boots.



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General Policy on Discounts:

Note: (Company Name) periodically runs Special Coupons that are to be honored.

Note: (Company Name) doesn't honor our Competitors coupons or discounts.

Note: Only one coupon may be applied per visit, use whichever offers the greatest savings to the Customer.

General Payment Policy:

Note: All payment for service work is to be collected at the time of service by the Technician unless specifically told otherwise by the Dispatcher or in the notes section when the call is dispatched to the Tech.

(Company Name) accepts Master Card, Visa, American Express, Discover and Personal or Business Checks. Any exceptions need to be checked by the office.

Our standard payment policy for install work is all Customers are to pay 50% down and when job is completed we don't leave the home without collecting final payment.

The Installation Coordinator also secures a credit card for final payment prior to the day of installation. The homeowner has the option to make final payment by check rather than have us hit their credit card. The Installation Coordinator will make a note on your paperwork indicating expected payment for jobs presold.

Note: The job is considered paid in full when financing is approved, and all paperwork is signed. If the job is being financed with our 3rd party vendor [like GreenSky], Technicians can't leave the home till all paperwork is signed by the homeowner.

Note: (Company Name)'s Best Practice is to have the Customer sign the paperwork after the morning walk thru is completed on installations.

Note: All extended credit or payments must be approved prior to work being performed by the Install Manager.



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General Warranty Notes:

All new products supplied and installed by (Company Name) [unless the individual task in the flat rate books says differently] will have:

- For plumbing, a 1-year warranty for both material and labor.
- For heating, a 1-year warranty for both material and labor.
- For air conditioning, a 1-year warranty for both material and labor.
- For electrical, a 1-year warranty for both material and labor.

Note: If a customer chooses to supply the material, we will not install it. We explain that they would be stuck in the middle when something goes wrong and that would be unfair to them. So, we suggest they return what they bought, and we will supply and install the proper item to the professional specifications and stand behind it for a full year.

Note: If a customer wants a repair that we don't recommend, we won't do the work! It could be dangerous and that would put the company and the customer at risk

Note: There is No Warranty on any product that has been abused or badly neglected. The Service Tech will use their Cell Phone to contact their Field Supervisor first. If not available, they will contact the Service Manager on how to proceed

There are longer limited warranties on major installation items. If there is any question on these specific types of items and the warranty, check with the Service Manager.

The customer needs to initial the explanation of the specific warranty policy on the proposal prior to the start of the work.