



# Franchisee Manual

Updated March 2014

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***If you find any errors in this manual or have any suggestions as to how we can improve any procedures, please let your manager know as we are always looking to improve the way we do things.***

# Welcome to Puratap

We would like to take this opportunity to welcome you to the Puratap team. The success of our company relies strongly on the close working relationship between many Puratap departments and groups, including our inbound and outbound call centres, marketing, franchisees and plumbers. You are now a member of this team, and we look forward to working with you.

This manual is a reference and guide to the Puratap franchise. Its purpose is to set out protocols for handling all areas of filter changes and service calls effectively.

All protocols included in this manual – particularly those for reporting problems, returning faulty parts and equipment and payments – are extremely important and *must* be adhered to. Failure to adhere to Puratap policies and procedures will be considered a breach of your obligations and responsibilities under the franchise agreement.

Please keep this manual in your van at all times for your reference.

## ***Job description***

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The role of a franchisee is to provide top quality front line service to our customers;

- by completing filter changes and services as arranged by head office
  - in a timely manner
  - in accordance with Puratap's policy and procedures
  - to the highest quality of workmanship
- by representing the company on the road in a responsible and respectable manner
- by helping to educate customers on the importance of maintenance of the Puratap unit – preventing filter change extension

For full details of your job description and key responsibilities, please refer to your Franchisee Agreement (Appendix A.1).

## ***Around the office***

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### **Car park**

We have more than enough car parks to accommodate all staff during any shift. The car park/s:

- Are located on the South (Magill Road) side of the building

- Can be entered from either Stepney St or George St
- Are towards the Stepney street end – most with a label saying Puratap
  - Please do not park in the parks labelled Simes as these are owned by another company

In the unlikely event that all the car parks are full, there is also parking available on Stepney and George streets – please take note of any local time limits or parking restrictions. We do request, that for the evening shifts you park in our allocated car parks if possible so that we can ensure your safe passage to your car. If you have parked further from the building, we do request that you ask someone to walk you to your car to make sure you are safe. Your team leader/manager are happy to assist if needed.

Please be mindful of other cars in the car park and ensure that you enter and exit slowly and mindfully.



## Kitchen

There are two kitchens in the Puratap building – one upstairs and one downstairs.

The ***upstairs kitchen*** is not to be used for food preparation. It has a Puratap and a sink and is provided for getting drinks during your shift when required.

The ***downstairs kitchen*** is the main kitchen, with a number of facilities including a sink, microwave, cutlery and crockery, kettle, fridge, freezer, knives and a chopping board. There is also tea and coffee and sometimes bread and fresh fruit and vegetables that are all available for you at any time before or

after your shift – *not during*.

Most food items in the fridge (with the exception of the milk) belong to other staff so we ask that – other than the milk – you do not use anything found in the fridge.

- If you have any items that need refrigeration during your shift you are welcome to place them here, however due to limited space, this fridge is not to be used for long term storage.

Recyclable food items (such as milk cartons) are to be rinsed and neatly placed on the right hand side of the bench to be taken out by our cleaner. All other food containers and packages are to be disposed of in the bin.

When you are finished in the kitchen, we expect it to be left clean and tidy. All dishes are to be washed, dried and put away.

***Please note, the kitchen facilities are a privilege, not a right. Use should be limited to your break times, or before and after your shift. If the kitchen is left in an untidy state these facilities will be removed or restricted immediately.***

## **Recycling and rubbish**

Puratap is committed to being a green company. This means that we recycle whenever possible, and it is important that you are familiar with our recycling procedures. Around Puratap you will find 3 types of bins.

### 1) Normal - white bins with plastic liner

- To be used for all general scraps and rubbish
- All food scraps are to be disposed of in the kitchen bin
- Any paper containing customer details, phone numbers or sensitive information is *not* to be placed in normal bins

### 2) Recycling - cardboard boxes

- To dispose of white scrap paper only, no coloured paper please
- Any paper containing customer details, phone numbers or sensitive information is *not* to be placed in recycling bins

### 3) Shredding - large blue and yellow bins

- This is for paper containing customer details or sensitive information
- Also reserved for paper that contains company information
- This bin can be found in the printing/training room

## **Work drawer**

Each Franchisee is assigned a work drawer in the office of the Franchisee Manager. This is where your paper work will be distributed and it is expected

that you will be vigilant in checking your work drawer on a daily basis.

## **Warehouse**

The Puratap warehouse is attached to the main building and is accessible from the carpark or inside the building (kitchen or managers office). The warehouse is a restricted area with only specific staff having permission to enter – Franchisee's are allowed to enter.

***A high-vis vest must be worn at all times while in the warehouse. This is a mandatory legal requirement and failure to do so will be considered a breach of your Franchisee agreement.***

There are some communal vests hanging in the lunch room if required, however it is likely that you will need it for some filter change site visits so it is recommended that you obtain your own vest and store it in your van.

We request that you do not linger in the warehouse longer than absolutely necessary to reduce any safety risks.

## **Locker**

In addition to a pigeon hole, each franchisee is allocated a locker in the warehouse. This locker is where the Stock Manager will deliver and audit stock.

There is only to be enough stock in your van for one day. The onus is on the franchisee to ensure stock is kept to a reasonable level and to report any issues. Spot checks of stock and recording/reports will be performed at the discretion of management.

If you have any questions regarding your locker or stock, or require any additional stock to what is in your locker, please contact the Warehouse Manager. Note you are not to access stock yourself – it must be collected through the Warehouse Manager.

## **Security**

It is the responsibility of the Franchisee to ensure the security of their vehicle at all times. Any money or electronic equipment in the van should be secure and locked away when the vehicle is unattended. This may include (but is not limited to) loose change, mobile phones, EFTPOS machines, any GPS tracking systems or your iPad.

## **Communication**

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There are a number of reasons why Puratap head office may need to contact the Plumbers/Franchisees and vice versa. To ensure that all requests are recorded and processed accurately and efficiently, the following procedures must be followed by all employees.

### **Puratap office contacting franchisee/plumber**

- Your iPad must have an active 'chip' on an internet plan, enabling you to send and receive e-mails
- All e-mails shall be responded to within 20 minutes of being sent. This does not need to be a long response, when appropriate a simple "OK" will suffice
  - If further clarification is required please call the office on 133 502
  - You may either speak to your manager, or a member of the inbound call centre
- For urgent inquiries or conversations and clarifications, mobile phone will be used
- Mobile phones shall be charged, carried and switched on at all times
- A missed call registered on your phone from the office shall be returned within 15 minutes, if not sooner.

### **Franchisee/plumber contacting the Puratap office**

- If you have any questions about a customer or booking you can either
  - email your manager or [admin@puratap.com](mailto:admin@puratap.com) or call 133 502
- If you have a complaint or query about your past, present or future runs or bookings, contact your manager who will investigate for you. This includes servicemen who want to know what their runs are for the week.
- Please note that night staff (outbound team) are not able to provide you with this information or take complaints
- If you need to immediately document an event, you can do this by emailing [compliancereports@puratap.com](mailto:compliancereports@puratap.com)

*In all communications, both written and verbal, it is important to maintain a professional manner. Any abusive or inappropriate comments will be considered a breach of the Puratap Code of Conduct, and the Franchise Agreement.*

# OHS&W

Puratap has detailed OHS&W procedures for work performed at the Puratap head office site. These policies and procedures are available for perusal in hard copy in the office. If you wish to see this at any time, the office manager will be able to point you in the right direction.

It is also a legal requirement that as the owner of a business, Franchisees follow all Work Place Safety (WPS) legislation which includes having a OHS&W plan. If you need assistance with the WPS legislation or creating an OHS&W plan, please contact HR who will be able to advise you of external contacts relevant to your situation.

Some general Puratap safety policies that are relevant to franchisees are included below.

## ***Personal safety***

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During your working day:

- Never put yourself in danger.
  - If you feel that you are at risk, phone the office for advice and speak to a Manager.
- Wear enclosed shoes and leave them on for the entire time that you are on site.
  - This is a mandatory requirement for franchisees
- If you have a pre-existing health condition, it is in your best interest to advise HR during your orientation. This can, of course, remain confidential but by letting us know we can create a health plan so that we are prepared, should any incidents occur.

Some ways that you can reduce risk of injury as a result of manual handling include:

- Know your limitations, strength and fitness level
- Listen to your body, stop or rest if it hurts
- Be prepared for each task and plan to avoid awkward positions
- Set your van up so that you do not have to bend or reach too far for equipment
- Be aware of the way you get in and out of your van – it can place stress on your hips and back
- Bend at the knees, not from your back
- Invest in and wear a pair of knee pads if you wish
- When holding a heavy object, keep the object close to you and your arms in tight
- Lift objects using strength from your legs rather than your back and avoid any jerky motion

There are many ways that risk can be reduced and it the responsibility of the

Franchisee to reduce the risks as much as possible. Any risk to you and your safety, is a direct risk to your business.

## ***Driving safely***

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It is an expectation of Puratap that Franchisees will always abide by safe driving practices and South Australian driving laws. Remember that as the 'face' of Puratap, you must be wary of how your actions and behaviour may influence the opinions of the public and the Puratap brand – and ultimately your business. Remember your van is a sign written with the Puratap logo and phone number, so you are in fact a travelling billboard.

Risks and hazards associated with driving can be minimised by:

- Adjusting seating and mirrors to reduce the need for stretching
- Entering and exiting your vehicle carefully
- Keeping the van neat and tidy with all parts in the back of your van within reach
- Taking note of heights of doorways and equipment fitted to the van
- Having a cargo barrier fitted

All Franchisees have a duty of care for their own safety and ensuring that they do not put others at risk as a result of their actions. It is the responsibility of the Franchisee to:

- Abide by all road rules
- Refrain from driving if impaired by tiredness or medication
- Report any driving related incidents
- Carry out any routine vehicle checks prior to driving
- Obey speed limits
- Pull over, or use an approved hands free kit, if needing to use a phone while driving
  - It is highly recommended that you wear a bluetooth headset during the day

Driving while stressed can be as distracting and dangerous as talking on a mobile phone while driving. If you are feeling anxious, please pull over and take a moment to regroup. If need be, contact your customers to advise them you are running late or contact the office and ask for assistance.

***Please note that Puratap does not under any circumstances condone speeding. If you are running late for a job, call the customer to apologise and advise them of an estimated ETA.***

## ***Fire & emergency evacuation policy***

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In the event of an emergency at Puratap head office, the following policy will apply.

On the discovery of a fire, or if an emergency evacuation is necessary:

The nominated fire warden(s) will:

- Remove anyone in immediate danger
- Isolate the fire/incident by closing doors or windows
- Activate the fire/evacuation alarm for the building
- Telephone 000
- Account for all employees, franchisees and contractors
- Direct all employees to the designated assembly point situated at back of Puratap or, if possible, return the employees to their work area/station

All employees, contractor and franchisees will:

- Proceed to the designated assembly point, as advised by your fire warden
- Exit the building out of the appropriate exit, depending on where the danger lies
- Leave all personal belongings behind – including your van
- Await the arrival of the nominated fire warden(s) and give details of the incident
- Remain at the assembly point until instructed by the fire warden(s) that it is safe to move elsewhere

***If you are at a customer's address – particularly a business – please make sure you follow the instructions of the fire wardens or owners of the premises.***

At no time are you required to place yourself in danger.

## ***Injuries & accidents policy***

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Each franchisee is responsible for their own workcover and accident insurance. All accidents and injuries of a franchisee are to be reported to the franchise company (Puratap). The franchise company must set their own guidelines and procedures for dealing with these incidents.

If an incident occurs when the franchisee is on site at a customer's property, Puratap must be informed for insurance purposes, and the following rules apply:

- The Puratap office must be notified as soon as practical after the incident.
- All relevant information must be reported, including:
  - Phone number and customer number of incident property.
  - The nature of the incident, date and time of the occurrence and the details of any witnesses.
  - Details of any injury or damage that the customer or premises sustained as a result of the incident.

*Please note: It will be considered a breach of your obligations and responsibilities under the Franchisee agreement if you do not adhere to the incident and accident policy.*

## ***Franchisee holiday policy***

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For any period of leave, a relief driver must be arranged to cover the runs allocated to your franchise for that time. It is recommended that you endeavour to organise your leave as early as possible, so that you can ensure there is a relief driver available for the period of your leave. You are responsible for booking this time with the relief driver and marking it on the leave board in the franchisee manager's office.

You are also required to fill out a Franchisee leave request, available from the Manager's office. Leave will only be approved if a suitable relief driver has been organised.

As relief driver availability is often pre-booked many months in advance, leave cannot be guaranteed. Puratap encourages you to start organising the relief driver as soon as you know your desired leave dates, so that you don't miss out.

Any questions regarding this policy should be directed to the Franchisee manager.

## ***Run cancellation***

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In the case of an emergency, where a Franchisee cannot complete a filter change run, Puratap must be advised as soon as possible so that they can arrange a relief driver. This notice should be directed to the franchisee manager in the first instance.

Run cancellations have a significant impact on your franchise and the company. As you can imagine, there is significant loss of income and time, in addition to inconvenience to our customers.

Puratap will do whatever possible to prevent a run being cancelled. However, in the case that a run must be cancelled, Puratap must cover the costs associated with cancelling a run. Therefore, a fee for cancelling a run will be applied to the Franchisee.

***All runs cancelled will incur a fee of \$600 unless an approved relief driver can be found to complete the run.***

Thanks to a committed team of franchisees, this is very rarely the case. Please

keep in mind that the sooner you can give notice to Puratap, the more likely we will be able to avoid this cost to you.

## ***Customer complaints***

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In any customer oriented business, it is inevitable that there will be times when a customer is dissatisfied with our service and wish to make a complaint. As you are the only face that most customers will see, they will often pass this complaint on to you. If this happens:

- make sure you get all of the relevant information from the customer
- tell the customer that their issue will be forwarded to the relevant person, and that we will get back to them with a resolution ASAP
- record all relevant details on your iPad (in foxpro if relevant or in an email)
- forward the customer number and customer contact details to [compliancereports@puratap.com](mailto:compliancereports@puratap.com)
  - should the matter be urgent, you may also call the office and speak directly with the franchisee communicator or the relevant manager

Please note that the more information you can provide us with in this initial complaint the better. It is always a good idea to provide your side of the situation as early as you can while the complaint is fresh in your mind.

## ***Internal compliance (issue) reports***

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Should you encounter an issue with an internal process or procedure or a mistake in a booking, please email the issue to [compliancereports@puratap.com](mailto:compliancereports@puratap.com). If for any reason you are unsure of whether to report the problem, then you can discuss this with your manager, or where appropriate, with the franchisee communicator.

## ***The franchise agreement***

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Please refer to Appendix A.1 for a copy of the full Franchise Agreement.

Please ensure that you have read and understand fully the franchise agreement. It is a legal document and non-compliance will result in a breach of your obligations and responsibilities under the franchisee agreement.

Puratap advise that should you be unsure of anything contained in the

franchise agreement that you contact a lawyer for clarification.

### ***Franchise disclosure document***

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Please refer to Appendix A.2 for a copy of the full Franchise Disclosure Document.

Please ensure that you have read and understand fully the franchise disclosure document. It is a legal document and non-compliance will result in a breach of your obligations and responsibilities under the franchisee agreement.

Puratap advises that should you be unsure of anything contained in the franchise disclosure document that you contact a lawyer for clarification.

# Franchisee code of conduct

## ***The 'face' Of Puratap***

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As a member of the Puratap franchisee team, you are considered to be the 'face' of Puratap and are expected to carry out your duties in a prompt, efficient, professional and courteous manner, as per the *franchise agreement* (Appendix A.1). Puratap customers do not see our office staff. The only contact they have with us is over the phone, or when they allow a Franchisee or Plumber into their home. For this reason, it is paramount that your behaviour and conduct reflects the values of Puratap. This will allow the customer to feel that they have invested in a reputable company, and that they are being taken care of.

Please keep in mind that by your conduct the image of Puratap is on display. Remember this when you are in the Puratap uniform and/or when driving in your Puratap van.

## ***Dress code***

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During the times that you are a representative of Puratap, it is vital that you adhere to the Puratap dress code.

The uniform consists of:

- Navy blue polo shirt with screen printed Puratap logo or a light blue poly-cotton shirt with the Puratap logo sewn onto the shirt. These can be purchased through Puratap, or shirts can be purchased via your own means and provided to the embroiderer to have the Puratap logo sewn on.
- Navy blue trousers or shorts, which can be embroidered with the Puratap logo for taxation purposes if you choose.
- Covered, fully enclosed shoes. Sport shoes are allowable, but darker in colour is considered more appropriate. Sandals and similar footwear shall not be worn unless a medical certificate can be provided to warrant their use.
- Hats or peaked caps with the Puratap logo are optional and can be purchased from Puratap.

Uniforms are to be kept neat, clean and presentable at all times. The wearing of denim will not be tolerated as a form of a uniform work wear.

The current supplier of uniform shirts and embroidery services is:  
Valerie Travers: 193 Angus Street, Adelaide, SA 5000  
Ph: (08) 8223 5375  
Fax: (08) 8223 3163  
[www.valerietravers.com.au](http://www.valerietravers.com.au)

*Please note: It will be considered a breach of your obligations and responsibilities under the Franchise agreement if you do not adhere to the Puratap dress code.*

## **Van policy**

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Please take note of the following policy regarding the maintenance of your Puratap van. The Vehicle at all times should be:

Kept clean and tidy, inside and out

- Registered and insured
- Maintained in a roadworthy condition
- Serviced regularly at any certified mechanic
- Equipped with a First Aid kit

The following checks must be performed regularly by the Franchisee:

- Tyres
- Brakes and handbrake
- Lights and indicators
- Clutch brake pedal rubbers (which must be replaced when worn)
- Engine oil and coolants are to be checked weekly
- ***That the Puratap logo is kept in a clean and neat state. Faded and marked logos leave a bad impression for the Puratap brand, and must be replaced.***

The current supplier of the Puratap van logo is (they do work some Saturdays):

State Signs Pty Ltd: 29 Bennett Street, Thebarton, SA 5031  
Ph: 8443 4422  
Fax: 8234 1491  
e: [statesigns@internode.on.net](mailto:statesigns@internode.on.net)

Any problems which may affect the safe operating of the vehicle (suspension, steering or any unusual noise etc.) should be attended to ASAP, and a temporary replacement can be hired, at a cost to the Franchisee. The current supplier of hire vans is:

Complete Ute and van hire: 125 Holbrooks Road, Underdale, SA 5032  
Ph: 8234 1300  
[www.completeuteandvanhire.com.au](http://www.completeuteandvanhire.com.au)

The cost of maintenance and repairs are the responsibility of the Franchisee.

*Please note: It will be considered a breach of your obligations and responsibilities under the Franchise agreement if you do not adhere to these guidelines regarding the vehicles.*

## ***Customer service***

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The Puratap business, and your franchise, are both reliant on repeat filter changes. This means that we should make every effort to meet the needs and expectations of our customers so that they keep coming back for years to come.

Occasionally you will come across a customer who may have experienced a particularly unpleasant day or had an unpleasant experience with a previous serviceman. Please do not be offended by their behavior. We experience this quite frequently over the phone. The best way to make the customer feel better about having you in their home is to remain courteous at all times, and to make the customer feel like they are being taken care of. We acknowledge that in certain circumstances this may be difficult, but we expect that you will draw on your knowledge, experience and professionalism to overcome these issues.

Do not put down your fellow franchisees or the call centre staff to a customer; this is bad for your repeat business and the Puratap brand.

## ***Customer confidentiality***

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Puratap is responsible for maintaining customer files, and respecting the privacy and confidentiality of all of this data. Any person who is in possession of customer details, in order to perform their duties for Puratap, has to make sure that the information remains confidential and secure, and that no sensitive information is left anywhere to be found by a member of the public.

If you have customer details in hard copy form, you must return the information to the Puratap office as soon as practicable. Copies in any form, whether printed, photocopied, scanned, or hand written, must not be made and kept by any Contractor, Franchisee or employee of Puratap.

*Please note: It will be considered a breach of your obligations and responsibilities under the Franchise agreement if you do not keep this information confidential.*

For a full copy of the Puratap Confidentiality Agreement, please refer to Appendix A.2.

# Product information

It is vital that you fully understand the product as you will often be the first person that a customer will direct an enquiry to. If at any stage you are unsure about a feature of the product you can either refer to this manual, the company website, or the franchisee manager. If you can't find an answer to the question, then the query can be directed to the Managing Director.

## ***The Puratap history***

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When the Puratap company formed in 1995, we were no different from the many other water filtration companies on the Australian market. We would import cheap water filter units from America or Europe to sell in Australia. It was not long, however, before we discovered that these units were not made to withstand our unique Australian conditions.

Australia has unusually high water pressure compared to the rest of the world, and water filter systems designed for other countries just did not last and, to our despair, many burst under the sinks of unsuspecting customers. We searched the world, but could not find a water filtration system that was strong enough to last.

With the help of Australian experts, such as Polymer Scientist, Dr John Scheers, and from research teams within Australian Universities, we quickly identified the problem. The plastics used in other water filter units were not strong enough. Based on this discovery, we knew that we had to design our own product.

Our research indicated that we had to make a water filter unit from engineering grade plastic, which is specifically selected and manufactured for the purpose intended, and which does not stretch or warp under pressure or constant stress. Close attention was given to the design to make sure that it had no weak points, and was environmentally friendly. In addition to delivering a high quality product, we also had to compete with cheap imports from China, and to ensure our prices were affordable enough for the average Australian consumer to buy. We did not want to inhibit any Australian household from having a Puratap.

The end result of all our research and engineering is the **GI-2600 water filter** system, which has proven itself in the field, with over half of Adelaide's population drinking from a Puratap every day.

The price of a Puratap is, in most cases, less expensive than most imposted products available, and comes with a comprehensive warranty on the unit, which is unheard of in the entire water filtration market. The unit is so strong

that it has been licensed to be installed without a pressure-limiting valve (PLV) which, in itself, is a remarkable achievement, as every other product we have seen on the market can only be installed after a PLV has been fitted. Even in these cases, however, the units often fail because they, unlike the Puratap, are just not designed for Australian conditions.

The GI-2600 won the Australian Institute of Design Award and was nominated and short-listed for the Australian Design Award for Industrial Design and Engineering. In addition, the Puratap has been Australian Standards Level I Watermark approved. Results from our testing in the Australian Water Quality Centre are available on our website. With the GI-2600, we only offer one type of cartridge configuration. The best. And with half of the Adelaide population using a Puratap every day, we are confident that we do have the best product on the market.

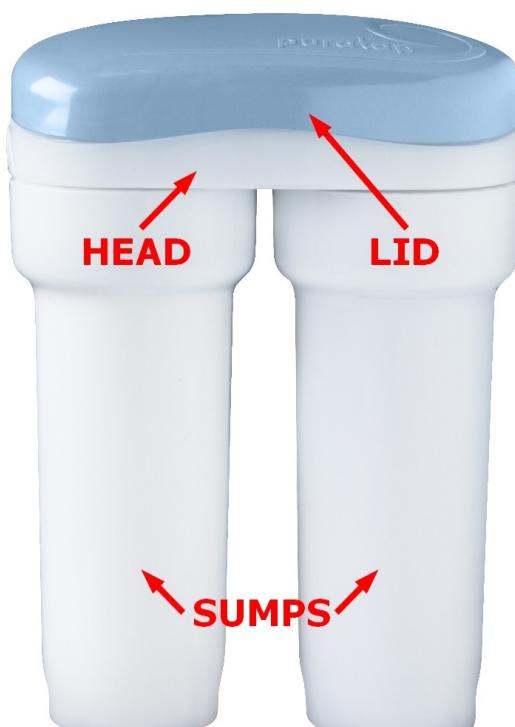
## **Puratap products**

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### **Puratap GI-2600**

The Puratap GI-2600 water filter unit is:

- Australian made and owned
- Designed and tested in Australia
- Made from strong, creep resistant engineering grade plastic – polyacetal
- Strong enough to be fitted without a pressure limiting valve
- Certified to withstand mains water pressure up to 191 PSI
- Fitted with the highest quality parts
- Dimensions: 25cm wide x 30cm high x 12cm deep



## **Puratap GI-2700 (rainwater unit)**

The Puratap GI-2700 is our rainwater filtration unit. It was introduced in 2012 to provide an option for customers that use solely or partly rainwater. The unit uses ultrafiltration technology which allows it to remove bacteria and viruses from water – which are a common problem with rainwater tanks.

The GI-2700 uses the same housing as the GI-2600, the difference is in the filters, with the presediment filter being omitted and the unit containing a carbon and ultrafiltration filter instead.

Apart from the difference in filters, the GI-2700 can be distinguished by the distinctive green lid.

## **Puratap filters**

The Puratap GI-2600 is fitted with 2 filters. The first is the pre-sediment filter, and the second is the carbon filter. They are both assembled here in Adelaide. Some of their features are:

### Pre-sediment filter

- Made from finely spun polypropylene
  - Which can be recycled after use
- Removes all the large undissolved particles and gunk from your water
  - Like dirt, algae and rust
- Protects, and therefore prolongs the life of your carbon filter
- Pore size is 1 micron (1 thousandth of a metre)

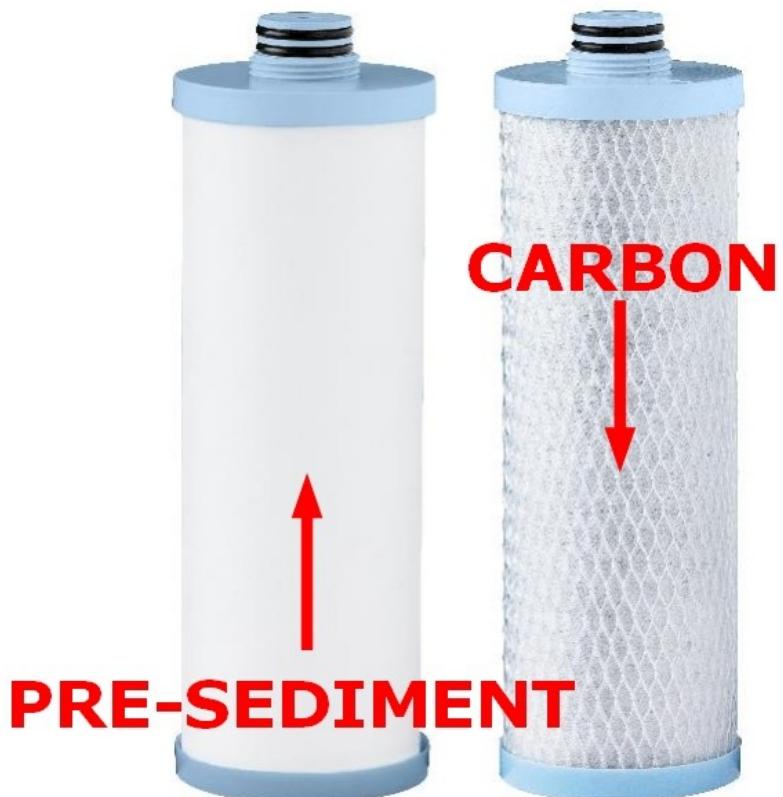
### Carbon filter

- Made from high quality activated carbon
- Extruded
- Removes the chemicals from your water by adsorption
  - Like herbicides, pesticides and trihalomethanes
- Pore size is 0.45 micron

### Ultrafiltration filter

- Made from thousands of hollow fibre membrane tubes
  - Like a bundle of straws
- Removes bacteria and viruses
- Pore size is 0.01 micron

Puratap pre-sediment and carbon filters are certified for use for 1 year, or 2500 L – whichever comes first. Puratap ultrafiltration filters under perfect conditions will also last for 1 year or 2500 L, however this depends on a number of factors including the quality of inlet water and the condition and cleanliness of the source rainwater tap. Therefore, the life of the ultrafiltration filter can't be guaranteed.



#### End caps

- Both the carbon and pre-sediment filters have an end cap configuration that is unique to the Puratap GI-2600
- One end is totally sealed and the other end has a double o'ring screw in fitting
- This eliminates the possibility of water bypassing the filter



## Puratap tubing, fittings and ball valve

Having the best product on the market is not just about the unit or the filters – a chain is only as strong as its weakest link. Because of this, Puratap only use the highest quality parts to get water to and from the GI-2600

### Tubing

- Our own specially designed and made 'Genuine Puratap tubing'
- Thicker than industry standard, so stronger – 2mm wall thickness

### Connections

- Jaco
  - Tubing is attached to the unit by jacos
  - Made of chemical resistant polyacetal
  - Screw in fitting
- Stainless steel tapered pipe fitting
  - Used to attach tubing to ball valve
  - Made of chemical and zinc resistant stainless steel
  - Screw in fitting

### Ball valve assembly

- Made of brass
- Contains a back-flow prevention valve
- All brass components of the ball valve assembly are Watermark approved

Tubing



Tubing fittings



Ball valve assembly



Genuine PurataP Tubing 11/06/09

## Puratap taps

Puratap provides customers with a choice of 3 stand-alone taps, or 3 mixer taps.

### Stand-alone taps

- Installed separately on the sink
- Require a 13 mm hole drilled in the sink



Standard



Mark II



Imperial

### Mixer taps

- Installed as a replacement to the general mixer tap
- Delivers hot, cold and filtered water
- Require a 35 mm hole drilled in the sink
- Installation by a plumber only



Classic



Purity



Elegance

## **Puratap's awards**

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The Puratap is made in South Australia, and has been lauded for several unique features that all of our competitors lack. The Puratap has a patented design, so it cannot be copied. Some of the awards and certifications that Puratap have won are:

- Australian made and owned certification
  - Awarded in 2010 in recognition of the status of Puratap as a 100% Australian owned company with an Australian designed, made and tested product.



- Level 1 watermark
  - Awarded in 2010 after testing certified that the Puratap GI-2600 met the standards as outlined in the 'Australia/New Zealand standard for drinking water treatment units – plumbing requirements' (ANZS 3497)



- South Australian Design Award 2002
- Nominated for Australian International Design Award 2002

## **Puratap versus other water filter companies**

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This section gives you some comparisons between a Puratap and a store bought or competitors filter. However, when discussing the advantages of Puratap with a customer you should do exactly that – discuss our advantages. Don't waste time bagging competitors as the quality of our products speaks for itself.

	Competitors unit and industry standard fittings
	 Made of creep prone polypropylene Designed and manufactured overseas Only withstands 30-70 PSI
	 Open end caps Generally 5 and 1 micron respectively
	 Plastic
	 1 mm wall thickness
	 Push in

# Electronics

## iPad

### Maintenance

#### **Charging**

iPad specifications state that the iPad should have approximately 10 hours of battery life. This may differ depending on usage and age, but not significantly.

It is your responsibility to make sure that you charge your iPad overnight so that it is fully functional and not at risk of running out of battery during the following work day. You may also wish to purchase a car charger so that you can charge your iPad in your van.

#### **Cleaning**

Making sure that your iPad remains clean is important for a number of reasons:

- So that the equipment looks neat, professional and presentable in front of the customer.
- So that the iPad remains in optimal working condition, and its functionality is not compromised by dirt, smudges, dust etc.

Do not use any solvents (including water) on the iPad – cleaning can be done by polishing with a soft cloth.

#### **Data cards**

As stated on page 9 of this manual, it is compulsory to have a functional data chip installed in your iPad so that you are able to be contacted at all times when on the road.

Your iPad should have Wi-Fi and Cellular capabilities. This means that you will be kept connected to the internet using a fast cellular data connection when Wi-Fi isn't available.

To start mobile data service, you will need a micro-SIM card and a data plan. A range of data plans are available with many not requiring a contract. Contact your wireless carrier for information on getting a micro-SIM and data plan.

#### **Updates**

Any time that an operating system or application update is available for your

iPad, you will receive an email with a link and download instructions. As the app is constantly being updated and improved, it is important that you report any bugs or issues that you notice with the app so that improvements can be incorporated.

## **Accessories**

There are a number of accessories available for the iPad which Puratap recommend that you purchase in order to protect the iPad (therefore prolonging its life) and making it easier to use.

### **Hard case**

As it is expected that you will take your iPad with you into every appointment, they can be in danger of being knocked or damaged. A hard case will help protect the iPad if this happens.

There are a number of different styles and options and you may also like to consider cases which have in-built stands so that you don't have to juggle the iPad with your other tasks and can set it up free-standing in the customer's home while you work.

### **Stylus**

If you have trouble using the touch screen with your fingers, or you prefer not to touch the screen with your hands (which may be dirty after completing a service), you can purchase a stylus. This tool is like a pencil, which you can use to tap the screen so that you can keep the iPad clean and operate it using finer accuracy.

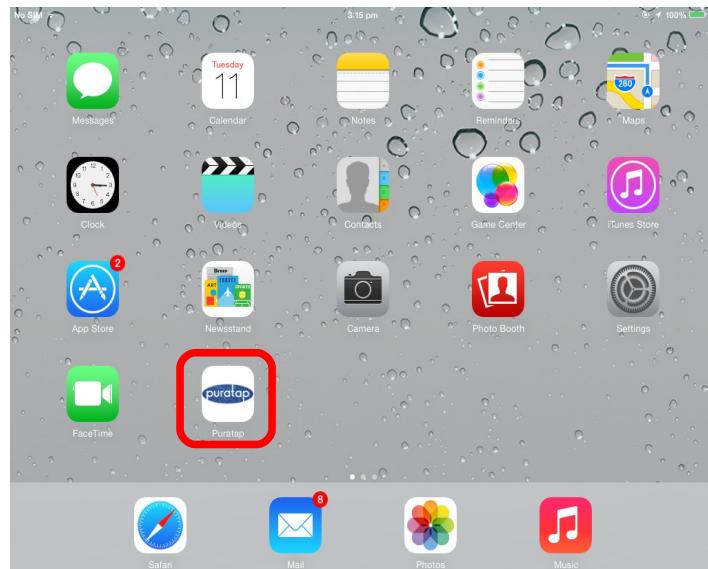
## **Expectations**

With regard to your iPad, the following expectations apply:

- That the iPad remains sufficiently charged to last an entire work day without running out of battery power.
- That you keep the iPad secure at all times.
- That the iPad will be taken into the customer's home during every service call.
- That, should you have any difficulty operating the system, you notify Puratap immediately.
- That it is maintained at a functional level, and that repairs are carried out as necessary.
- That you do not use the iPad whilst driving (as you would not use a mobile phone).
- That your iPad contains an internet data chip to allow access to the internet and your emails whilst you are in the field.
- That your email remains open and accessible for the duration of the day.

## **The Puratap application**

The Puratap Application is on the home screen of your ipad – tap to open it and access your daily runs.



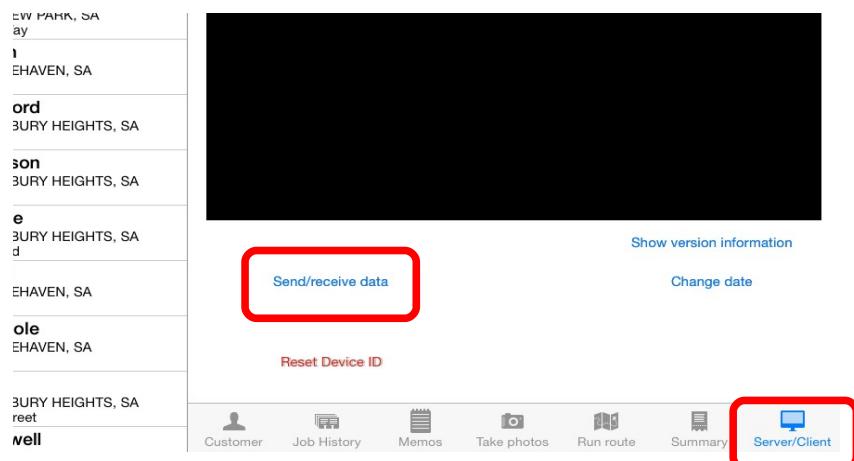
## **Downloading & uploading your runs**

Each morning you will need to upload your completed run from the previous day, and download your run for the current day. Downloads for the current day are only available in the morning of that day.

This data exchange needs to be done when you are relatively close to the data access point – so from inside the office, not in the car park. The more walls that lie in between the hot spot and iPad, the less reliable the connection. If your iPad loses the network connection in the middle of the transfer, there may be complications, so it is best to ensure that you are in the office when uploading and downloading your data.

To complete the data exchange:

- Navigate to the Server/Client screen by pressing the icon once
- Tap once on 'Send/receive data'



This will upload your completed work and download your current work in one step. Be patient, as this may take a few minutes.

If you are also collecting a country run, and so are downloading 2 runs at once (one for the current day and one for the day after), you can select the correct run to work on by tapping 'Change date'.

Although it is not important for you to understand any of the green code, you will notice that there are entries for the date of the run and the name of the Franchisee. If you see that either of these two fields are incorrect, you must see the Franchise or Plumbing manager as soon as you are aware of the error.

## Organising your run

After you have your current run downloaded onto your iPad, this is a good time to organise your work day so that it is most convenient for you.

Navigate back to the customer details screen by tapping the 'Customer' icon. On the left of the screen you will see a list of all of the customers booked for the day. Tapping on each individual customer will allow you to find out more information about that customer.

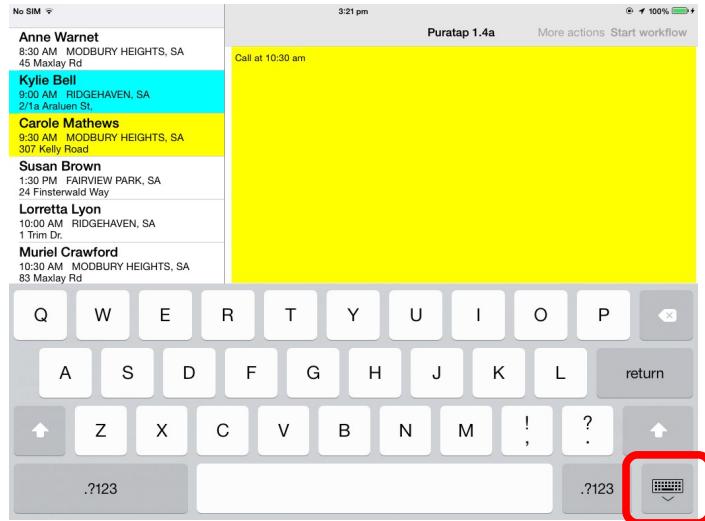
## Making a note

This system makes it very easy for you to see whether there are any special instructions for a customer. Tap on each customer and take note of the plumbing comments. If you find any important information that you would like to make a note of, you can press the 'Attention' button in the bottom right hand corner.

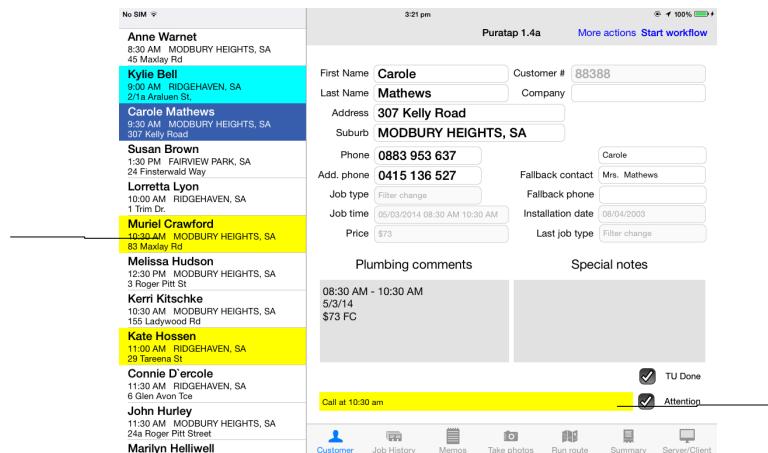
The screenshot shows the Puratap 1.4a mobile application interface. On the left, a list of customers is displayed with their names, addresses, and booking details. On the right, detailed customer information is shown in a form. At the bottom right of the screen, there is a red box highlighting the 'Attention' button, which is used to mark specific notes for a customer.

Customer Details	Customer Information
Anne Warnet 8:30 AM MODBURY HEIGHTS, SA 45 Maxlay Rd	First Name: Carole Customer #: 88388 Last Name: Mathews Company:
Kylie Bell 9:00 AM RIDGEHAVEN, SA 2/1A Araluen St,	Address: 307 Kelly Road Suburb: MODBURY HEIGHTS, SA
Carole Mathews 9:30 AM MODBURY HEIGHTS, SA 307 Kelly Road	Phone: 0883 953 637 Contact person: Carole Add. phone: 0415 136 527 Fallback contact: Mrs. Mathews Job type: Filter change Job time: 05/03/2014 08:30 AM 10:30 AM Installation date: 08/04/2003 Price: \$73 Fallback phone: Last job type: Filter change
Susan Brown 1:30 PM FAIRVIEW PARK, SA 24 Finsterwald Way	Plumbing comments: 08:30 AM - 10:30 AM 5/3/14 \$73 FC
Loretta Lyon 10:00 AM RIDGEHAVEN, SA 1 Trim Dr.	Special notes:
Muriel Crawford 10:30 AM MODBURY HEIGHTS, SA 83 Maxlay Rd	
Melissa Hudson 12:30 PM MODBURY HEIGHTS, SA 3 Roger Pitt St	
Kerri Kitschke 10:30 AM MODBURY HEIGHTS, SA 155 Ladywood Rd	
Kate Hossen 11:00 AM RIDGEHAVEN, SA 29 Tareena St	
Connie D'ercole 11:30 AM RIDGEHAVEN, SA 6 Glen Avon Tce	
John Hurley 11:30 AM MODBURY HEIGHTS, SA 24a Roger Pitt Street	
Marilyn Helliwell	

This will bring up a yellow box. Tap into the box to make the keyboard appear. Write whatever note you would like, and press the keyboard icon to return to the customer detail screen.

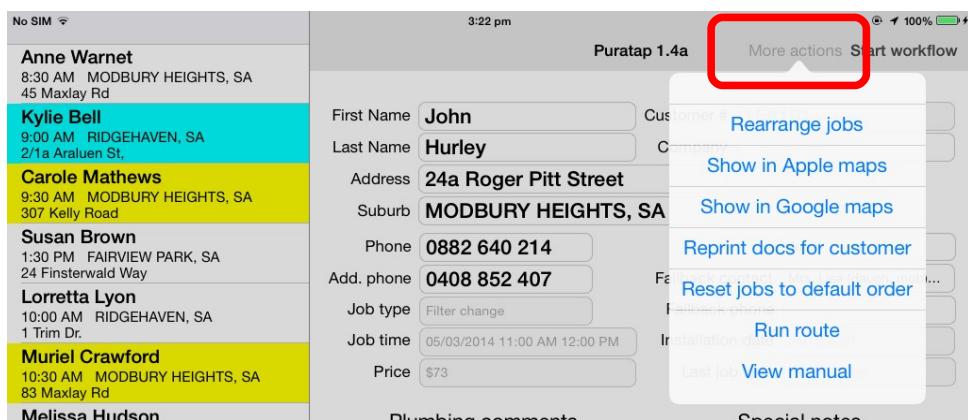


Your note will appear at the bottom of the screen, and the customer will now be highlighted in yellow on the left hand side, so you will be able to see immediately any customers that you have flagged.

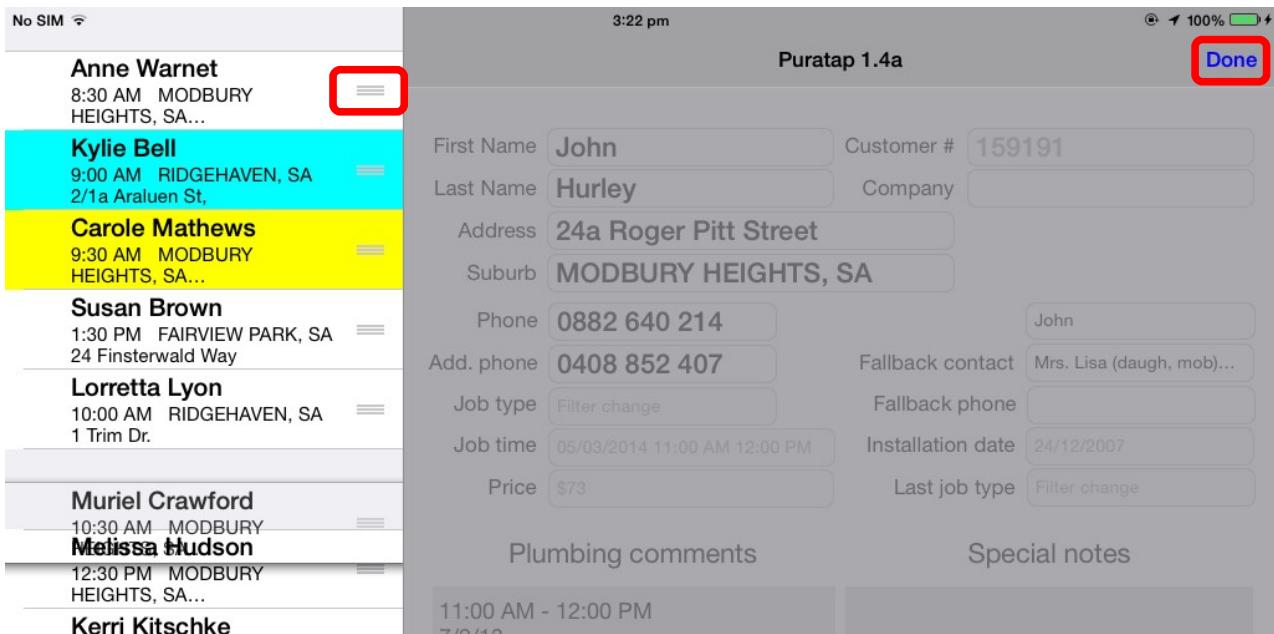


## Rearranging jobs

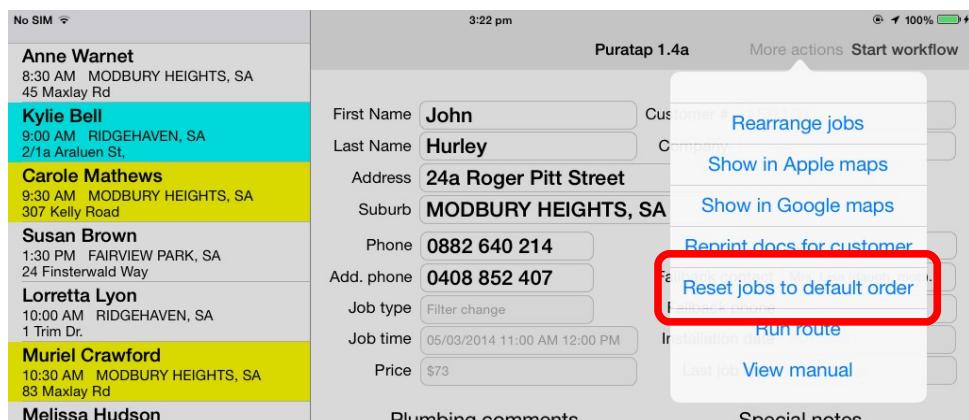
In the above right corner, you will see an icon called 'More actions'. Tapping this button will bring up a list of things that you can adjust within your run.



Tap 'Rearrange jobs' to move your jobs around into whatever order you like. You will see that there is now a small icon next to each customer name in the run order. Press and hold the icon next to the customer name that you would like to move, and drag the customer to wherever you would like it to appear in the order. When you are happy with where you have it, release the icon. When you have finished moving all of the jobs that you wish to, press 'Done' to take you back to the customer details screen.



If you ever want to re-set the original order of the run, click on 'More actions' again, and then 'Reset jobs to default order'.

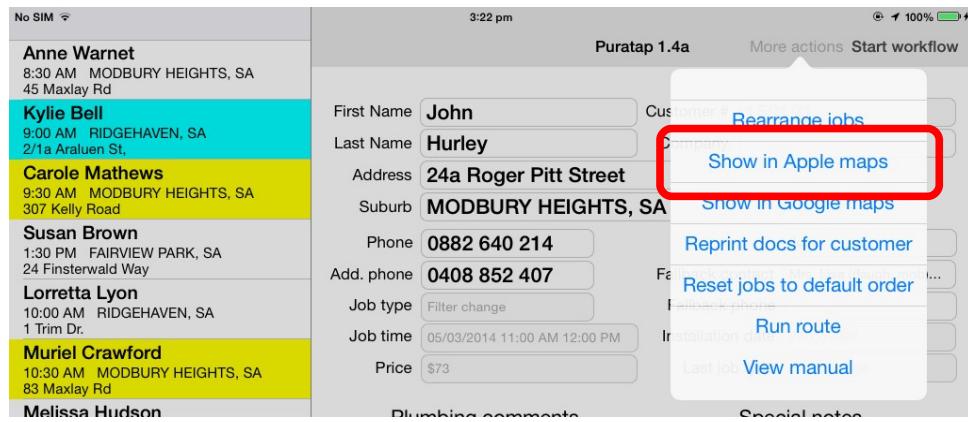


## Finding a property (using maps)

At times, it may be difficult to find a customer's property. If your GPS or Satellite Navigation Device has trouble finding an address, or you need to look for it once you are out on the road, you can do this by using Apple Maps or Google Maps.

(1) To use Apple Maps:

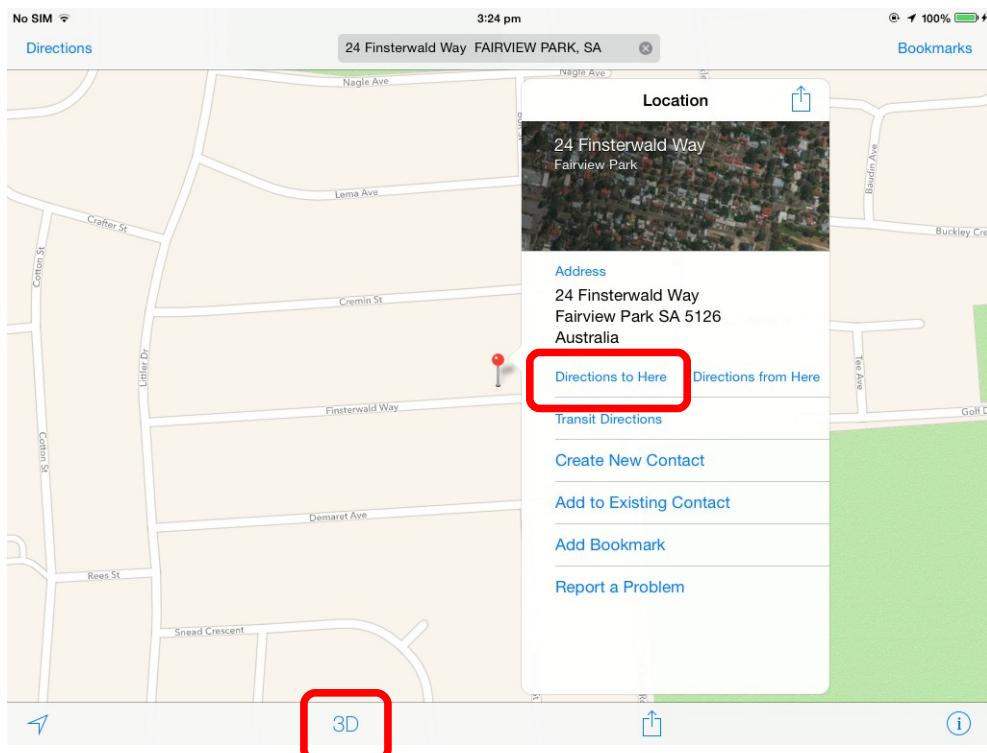
Click on 'More actions' and then onto 'Show in Apple maps'. Your iPad will generate a map showing the address appearing as a pinpoint.



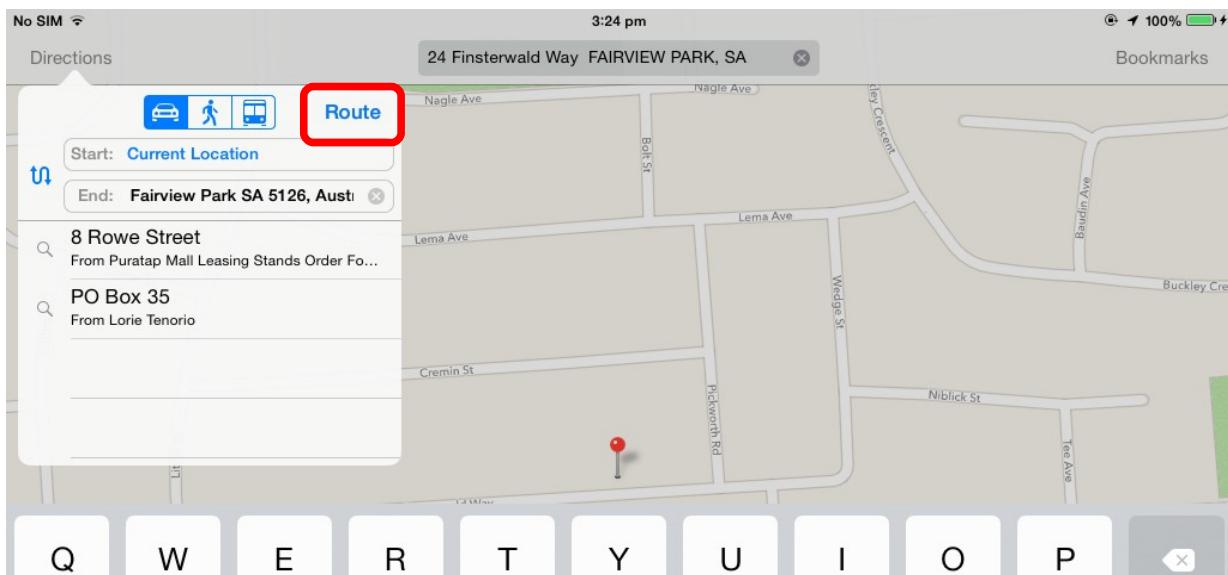
You can zoom in and out of the map, and also rotate the map by 'pinching' the screen. You can also make the map 3D by tapping 3D in the bottom left hand corner.

To get more information about the address, click on the pin and then the little information symbol on the right.

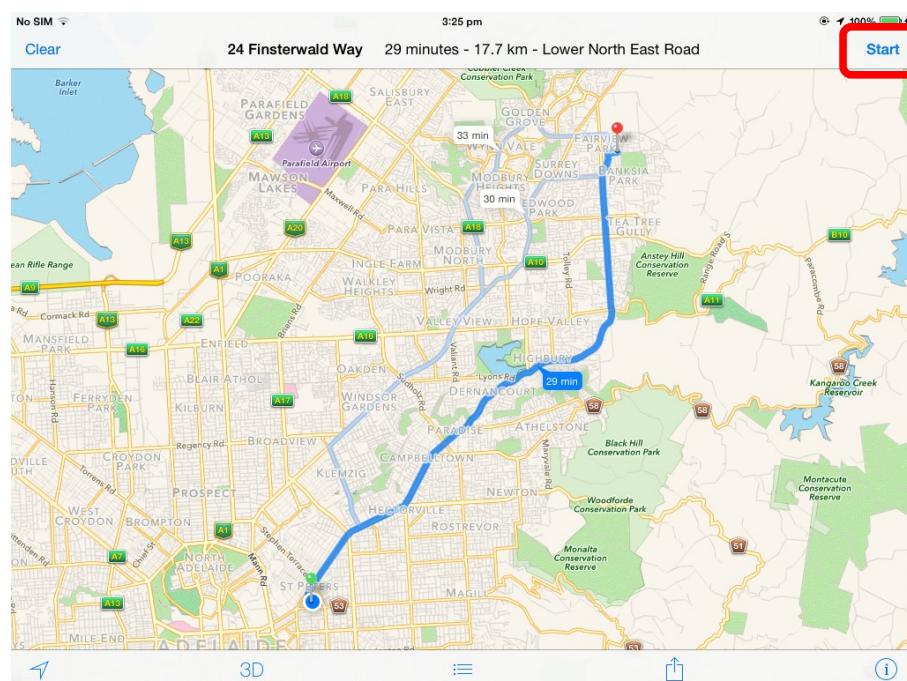
From here, you can see a satellite view of the area and can request directions to the address from anywhere in the world. Click on 'Directions to Here' and type in where you are coming from. As your iPad works as a GPS as well, you can even request directions from your current location.



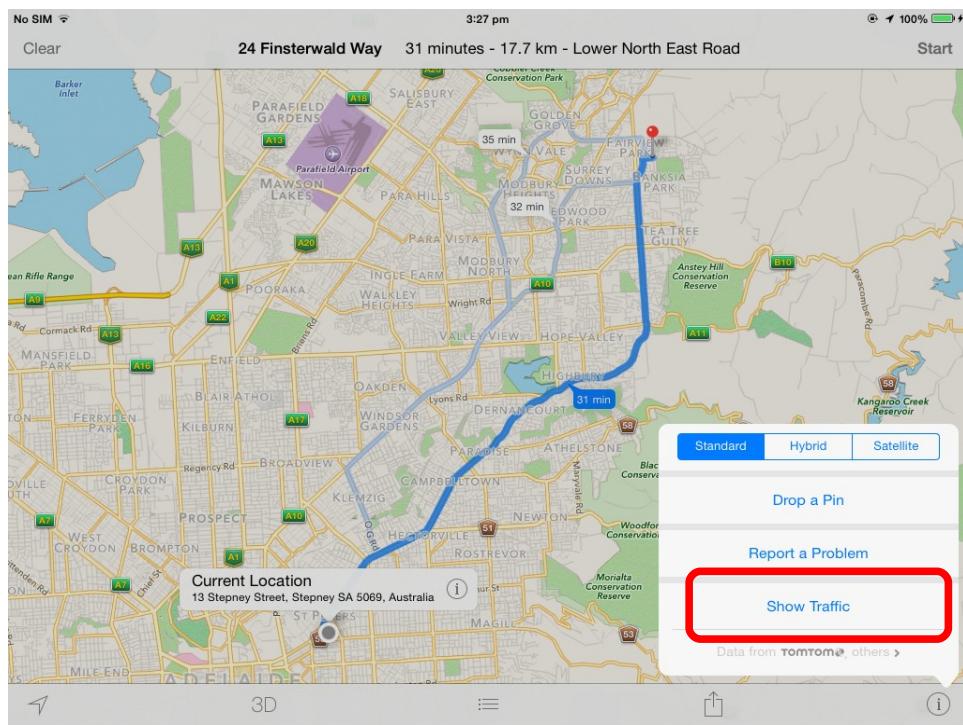
Click 'Route' and your iPad will give you a number of pathways to get to the address, with the most direct route highlighted in the boldest shade of blue.



If you want to use the iPad as a GPS from here, click 'Start' in the top right hand corner. This will give you clear directions as you drive.



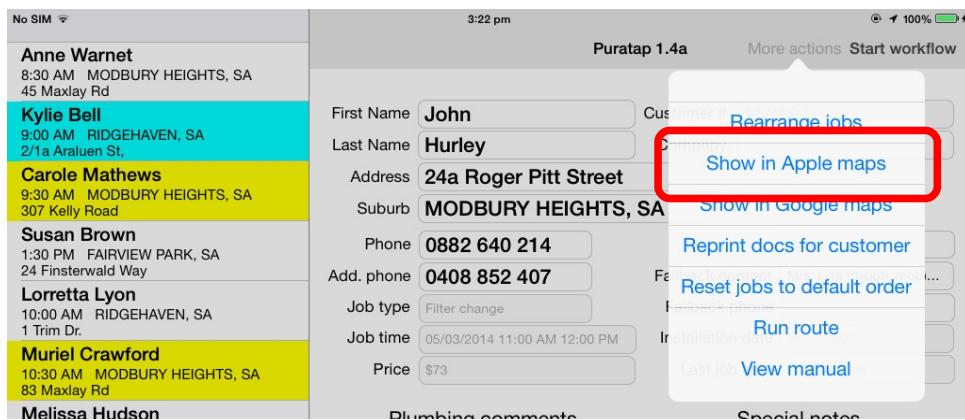
You can even ask the iPad to tell you where there are traffic restrictions by pressing the 'i' at the bottom right hand corner of the map – this will open more options. Press 'Show Traffic' to make roadwork icons appear on the map.



To hide these icons again, click the corner and then 'Hide Traffic.' There are also options in this menu to view the map as a satellite image, or as a combination between a drawn map and a satellite image.

## (2) To use Google Maps

From the customer details screen, click on 'More actions' and then onto 'Show in Google maps'. Your iPad will generate a map showing the address appearing as a pinpoint.



Using Google maps is almost the same as using Apple maps, so you can follow the same process as above for seeking directions.

Google maps can bring up an image of the property and street that you are looking for, so you know exactly which is the right house. This may be of use for houses with no street numbers, for lot numbers in country runs or newly developed housing estates. Keep in mind however, that if the address is particularly new, it may not have been updated in google maps yet.

When you have searched for the address, press and hold the icon of the little man in the top left corner of the map. While you are holding the icon, all of the streets that there are photos available for will turn blue. Pull the man icon onto the pinpoint of the address that you wish to see.

**Customer**

24 Finsterwald Way FAIRVIEW PARK, SA

Search

Map Satellite

Lema Ave

Lema Ave

Pickworth Rd

Wedge St

Cremin St

Cremin St

Cremin St

Finsterwald Way

Grate Valves

Demaret Ave

Von

McHale Rd

My Own Handymen

Adelaide Floor Surfacing

Advanced Tilt Tray Towing

Customer Job History Memos Take photos Run route Summary Server/Client

When the photo appears, you can look around in a 360 degree circle to see everything in the area until you find the property. If you want to see what is further up the same road, click on the arrows.

No SIM

3:30 pm

100%

Customer

24 Finsterwald Way FAIRVIEW PARK, SA

Search

24 Finsterwald Way, Adelaide, South Australia  
Address is approximate

Finsterwald Way

Finsterwald Way

Customer Job History Memos Take photos Run route Summary Server/Client

## Run route

There is a 'run route' functionality in the app that is designed to help you assess the run and work out timing and the best order of jobs. This can also help you identify any difficult jobs that are a further distance from the main work of the run. Please note that it is expected that you will have used this tab to assess timing and distances before lodging any issues regarding distances on a run or between jobs.



The data that is generated in this tab is generated using the following assumptions:

- The first job of the day is done at the earliest possible time – e.g. if booked 8:30 to 9:30 it is commenced at 8:30
- Each job takes 10–15 minutes
- Driving speed in metro areas is approximately 30–40 km/h
- Driving speed in country areas is 60 km/h

A screenshot of the 'Run route' tab. On the left is a vertical list of jobs with their details and checkmarks. On the right, there are various settings for driving speed and time per job, with a 'Start' button. At the bottom, it shows 'Current iteration progress' and 'Iterations: 30/30'. The bottom navigation bar includes Customer, Job History, Memos, Take photos, Run route (highlighted), Summary, and Server/Client.

This tab will give you an estimation of the driving distance and time between jobs and the expected arrival time.

No SIM	3:59 pm	100%				
Anne Warnet 8:30 AM MODBURY HEIGHTS, SA 45 Maxlay Rd	25 jobs -- 75.2 km -- 14 mins/job -- 30 kmph					
ROUTE STEPS						
Start from: 307 Kelly Road MODBURY HEIGHTS, SA Assumed arrival: 8:30 AM						
Step 1 Drive ~1.59 km (3 min 11 sec) To: 45 Maxlay Rd MODBURY HEIGHTS, SA	Arrival: 8:47 AM	8:30 AM - 9:30 AM				
Step 2 Drive ~4.33 km (8 min 39 sec) To: 2/1a Araluen St, RIDGEHAVEN, SA	Arrival: 9:09 AM	8:30 AM - 10:00 AM				
Step 3 Drive ~1.41 km (2 min 49 sec) To: 1 Trim Dr. RIDGEHAVEN, SA	Arrival: 9:26 AM	9:00 AM - 11:00 AM				
Step 4 Drive ~3.32 km (6 min 37 sec) To: 155 Ladywood Rd MODBURY HEIGHTS, SA	Arrival: 9:47 AM	9:30 AM - 11:30 AM				
Step 5 Drive ~4.22 km (8 min 26 sec) To: 29 Tareena St RIDGEHAVEN, SA	Arrival: 10:09 AM	10:00 AM - 12:00 PM				
Step 6 Drive ~0.7 km (1 min 23 sec) To: 6 Glen Avon Tce RIDGEHAVEN, SA	Arrival: 10:30 AM	10:30 AM - 12:30 PM				
Step 7 Drive ~5.19 km (10 min 22 sec) To: 24a Roger Pitt Street MODBURY HEIGHTS, SA	Arrival: 11:00 AM	11:00 AM - 12:00 PM				
Step 8 Drive ~2.69 km (5 min 23 sec) To: 9/19 Alexander Ave MODBURY, SA	Arrival: 11:19 AM					
 Customer	 Job History	 Memos	 Take photos	 Run route	 Summary	 Server/Client

Occasionally an address entry error or geocoding issue may cause an error in the run route calculations. If you encounter this please advise the franchisee manager.

## Learning about a customer

You may have noticed a number of customers in the run list highlighted in blue. These customers have been flagged as those that require a tubing upgrade. This should give you an immediate idea of how many tubing upgrades you will need to offer during the day, and to which customers.

Tapping on each individual customer in the run list will allow you to find out more information about them. The icons running along the bottom of the screen can be accessed to learn about the job history, accounting history and previous correspondence recorded for any customer you choose.

The screenshot shows a list of customers on the left and a detailed view of a customer's location on the right.

**Customer List (Left):**

- Anne Warnet: 8:30 AM MODBURY HEIGHTS, SA 45 Maxlay Rd
- Kylie Bell:** 9:00 AM RIDGEHAVEN, SA 2/1a Araluen St. (highlighted in yellow)
- Carole Mathews: 9:30 AM MODBURY HEIGHTS, SA 307 Kelly Road
- Susan Brown: 1:30 PM FAIRVIEW PARK, SA 24 Finsterwald Way
- Loretta Lyon: 10:00 AM RIDGEHAVEN, SA 1 Trim Dr.
- Muriel Crawford: 10:30 AM MODBURY HEIGHTS, SA 83 Maxlay Rd
- Melissa Hudson:** 12:30 PM MODBURY HEIGHTS, SA 3 Roger Pitt St. (highlighted in blue)
- Kerri Kitschke: 10:30 AM MODBURY HEIGHTS, SA 155 Ladywood Rd
- Kate Hossen:** 11:00 AM RIDGEHAVEN, SA 29 Tareena St. (highlighted in yellow)
- Connie D'eroche: 11:30 AM RIDGEHAVEN, SA 6 Glen Avon Tce
- John Hurley: 11:30 AM MODBURY HEIGHTS, SA 24a Roger Pitt Street
- Marilyn Helliwell

**Customer Detail View (Right):**

Address: 24 Finsterwald Way FAIRVIEW PARK, SA  
Address is approximate

## Job history

The first icon you will see is the 'Job History' icon.

Tapping this will allow you to see the breakdown of all installations, services and filter changes for a customer, what year they were performed, and how much they paid.

The screenshot shows a list of customers on the left and a detailed job history view for a customer on the right.

**Customer List (Left):**

- Anne Warnet: 8:30 AM MODBURY HEIGHTS, SA 45 Maxlay Rd
- Kylie Bell:** 9:00 AM RIDGEHAVEN, SA 2/1a Araluen St. (highlighted in yellow)
- Carole Mathews: 9:30 AM MODBURY HEIGHTS, SA 307 Kelly Road
- Susan Brown: 1:30 PM FAIRVIEW PARK, SA 24 Finsterwald Way
- Loretta Lyon: 10:00 AM RIDGEHAVEN, SA 1 Trim Dr.
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- Melissa Hudson:** 12:30 PM MODBURY HEIGHTS, SA 3 Roger Pitt St. (highlighted in blue)
- Kerri Kitschke: 10:30 AM MODBURY HEIGHTS, SA 155 Ladywood Rd
- Kate Hossen:** 11:00 AM RIDGEHAVEN, SA 29 Tareena St. (highlighted in yellow)
- Connie D'eroche: 11:30 AM RIDGEHAVEN, SA 6 Glen Avon Tce
- John Hurley: 11:30 AM MODBURY HEIGHTS, SA 24a Roger Pitt Street
- Marilyn Helliwell

**Job History View (Right):**

Customer: Puratap 1.4a

Date	Type	Amount
07/01/2003	Installation	Collected on the day: \$65
29/03/2004	Filter change	Collected on the day: \$65
14/07/2005	Filter change	Collected on the day: \$65
19/07/2006	Filter change	Collected on the day: \$67
19/07/2007	Filter change	Collected on the day: \$67
12/01/2010	Filter change	Collected on the day: \$69
03/02/2011	Filter change	Collected on the day: \$0
15/03/2012	Filter change	Collected on the day: \$69
04/04/2013	Filter change	Collected on the day: \$69

**Toolbar (Bottom):**

Customer, Job History, Memos, Take photos, Run route, Summary, Server/Client. The 'Job History' icon is highlighted with a red box.

Although this is handy as a snapshot of the customer history, it is important to recognise that this is not always 100%. There may be information that has been incorrectly reported or omitted entirely in the past. To get a more accurate idea of the customer history, enter the 'Memos' tab.

## Memos

Navigating to the 'Memos' tab will bring up a list of every single memo recorded for a customer since their installation.

Customer	Date	Time	Content
Anne Warnet	01/02/2011	09:20:03	visa PAID exp 09/12 Mrs. Melissa Hudson \$69
Kylie Bell	01/02/2011	09:23:09	Plumbing comments
Carole Mathews	06/01/2012	18:28:14	Going /Been on Holiday going away until early feb
Susan Brown	09/02/2012	19:54:49	Plumbing comments
Loretta Lyon	20/02/2013	18:59:30	Plumbing comments
Muriel Crawford	03/03/2014	20:30:58	Ans/Mach -No message L
Melissa Hudson	04/03/2014	13:37:08	Plumbing comments
Kerri Kitschke	04/03/2014	13:37:11	Credit Card Not Drawn \$73 filter change
Kate Hossen	04/03/2014	20:25:25	Plumbing comments
Connie D'ercole			
John Hurley			
Marilyn Helliwell			

By company policy, every single time a staff member speaks to a customer or makes a change to a customer file, they *must* make a memo.

If the customer has many 'Plumbing comments' memos, with not much else in between, we know that they are a very loyal customer who arranges their filter change straight away every time we call.

If we see a customer with lots of memos between plumbing comments, we can view them to see why it took so long to arrange the filter change. This could have occurred for a number of reasons and it is of benefit for you to know what those are before attending the property to do the job.

No SIM	3:32 pm	Puratap 1.4a	Delete Memo	New Memo
<b>Anne Warnet</b> 8:30 AM MODBURY HEIGHTS, SA 45 Maxlay Rd	2.30pm - 4.30pm			
<b>Kylie Bell</b> 9:00 AM RIDGEHAVEN, SA 2/1a Araluen St.	01/02/2011 09:20:03 visa PAID exp 09/12 Mrs. Melissa Hudson \$69			
<b>Carole Mathews</b> 9:30 AM MODBURY HEIGHTS, SA 307 Kelly Road	01/02/2011 09:23:09 Plumbing comments Anytime Feb 3rd			
<b>Susan Brown</b> 1:30 PM FAIRVIEW PARK, SA 24 Finsterwald Way	06/01/2012 18:28:14 Going /Been on Holiday going away until early feb			
<b>Loretta Lyon</b> 10:00 AM RIDGEHAVEN, SA 1 Trim Dr.	09/02/2012 19:54:49 Plumbing comments 15.03.12			
<b>Muriel Crawford</b> 10:30 AM MODBURY HEIGHTS, SA 83 Maxlay Rd	20/02/2013 18:59:30 Plumbing comments thursday 4th april			
<b>Melissa Hudson</b> 12:30 PM MODBURY HEIGHTS, SA 3 Roger Pitt St	03/03/2014 20:30:58 Ans/Mach -No message L  04/03/2014 13:37:08 Plumbing comments 08:30 AM - 05:30 PM			
<b>Kerri Kitschke</b> 10:30 AM MODBURY HEIGHTS, SA 155 Ladywood Rd	04/03/2014 13:37:11 Credit Card Not Drawn  04/03/2014 20:25:25 Plumbing comments 09:00 AM - 05:00 PM			
<b>Kate Hossen</b> 11:00 AM RIDGEHAVEN, SA 29 Tareena St	08:30 AM - 05:30 PM 5-3-14 mb nothing to collect cc details in office unit will be left visible at front door			
<b>Connie D'ercole</b> 11:30 AM RIDGEHAVEN, SA 6 Glen Avon Tce				
<b>John Hurley</b> 11:30 AM MODBURY HEIGHTS, SA 24a Roger Pitt Street				
<b>Marilyn Helliwell</b>				
No SIM	3:32 pm	Puratap 1.4a	Delete Memo	New Memo
<b>Anne Warnet</b> 8:30 AM MODBURY HEIGHTS, SA 45 Maxlay Rd	2.30pm - 4.30pm			
<b>Kylie Bell</b> 9:00 AM RIDGEHAVEN, SA 2/1a Araluen St.	01/02/2011 09:20:03 visa PAID exp 09/12 Mrs. Melissa Hudson \$69			
<b>Carole Mathews</b> 9:30 AM MODBURY HEIGHTS, SA 307 Kelly Road	01/02/2011 09:23:09 Plumbing comments Anytime Feb 3rd			
<b>Susan Brown</b> 1:30 PM FAIRVIEW PARK, SA 24 Finsterwald Way	06/01/2012 18:28:14 Going /Been on Holiday going away until early feb			
<b>Loretta Lyon</b> 10:00 AM RIDGEHAVEN, SA 1 Trim Dr.	09/02/2012 19:54:49 Plumbing comments 15.03.12			
<b>Muriel Crawford</b> 10:30 AM MODBURY HEIGHTS, SA 83 Maxlay Rd	20/02/2013 18:59:30 Plumbing comments thursday 4th april			
<b>Melissa Hudson</b> 12:30 PM MODBURY HEIGHTS, SA 3 Roger Pitt St	03/03/2014 20:30:58 Ans/Mach -No message L  04/03/2014 13:37:08 Plumbing comments 08:30 AM - 05:30 PM			
<b>Kerri Kitschke</b> 10:30 AM MODBURY HEIGHTS, SA 155 Ladywood Rd	04/03/2014 13:37:11 Credit Card Not Drawn  04/03/2014 20:25:25 Plumbing comments 09:00 AM - 05:00 PM			
<b>Kate Hossen</b> 11:00 AM RIDGEHAVEN, SA 29 Tareena St	going away until early feb			
<b>Connie D'ercole</b> 11:30 AM RIDGEHAVEN, SA 6 Glen Avon Tce				
<b>John Hurley</b> 11:30 AM MODBURY HEIGHTS, SA 24a Roger Pitt Street				
<b>Marilyn Helliwell</b>				

## Reconciliation

The 'summary' tab allows you to reconcile all money received during the day. It is vital that you use it as a way to track and reconcile your payments.

At the end of each day, the cash and cheque totals must match the amount in your money bag and the EFTPOS total must match the printout from your machine.

If there is a discrepancy with any of these values, you must notify the accounts team immediately. We recommend you notify accounts by email ([rsahi@puratap.com](mailto:rsahi@puratap.com)) so that you have a written record of notifying Puratap of the discrepancy.

No SIM	3:36 pm	100%		
WEDNESDAY, 5 MARCH 2014				
CUSTOMER#	TYPE	TO COLLECT	RECEIVED	FEES
133696	EFT	\$73	\$73	\$14.00
99955	CSH	\$73	\$73	\$14.00
88388	IPO	\$73	\$0	\$14.00
77785	EFT	\$132	\$132	\$27.23
32707	EFT	\$105.5	\$105.5	\$29.42
TOTALS FOR WEDNESDAY, 5 MARCH 2014				
Cash \$73.00				
Cheques \$0.00				
EFT POS \$310.50				
Invoices \$73.00				
Total money \$383.50				
Total fees \$98.65				
<a href="#">Print this summary</a>		<a href="#">E-mail daily summary</a>		<a href="#">Switch to stock</a>
<a href="#">Filter change</a> <a href="#">Customer</a> <a href="#">Job History</a> <a href="#">Memos</a> <a href="#">Take photos</a> <a href="#">Run route</a> <a href="#">Summary</a> <a href="#">Server/Client</a>				

You can print or email yourself the data from the 'summary' tab to keep for your records.

## **Printer**

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Your mobile printer is a Zebra RW series printer, model number RW420. Instead of manually writing receipts as we have done in the past, we are now able to print this paperwork on the go. It is fast, works efficiently, and allows you more time to get through your daily workload. It also looks more professional and doesn't keep the customer waiting. Your printer has easy-access vehicle mounting cradles and charging options, as well as user-intuitive interfaces and angled displays. The printer is designed for harsh outdoor environments, extreme temperatures and weather conditions, trauma and water. Your printer will be set up for you by Puratap. Like the iPad, the printer will need to be charged overnight. To print a receipt, navigate to the receipt page of the Puratap app, the printer will automatically generate a receipt for the customer.

Please ensure that the receipt has printed correctly. If not please notify the office immediately and tell the customer that the correct receipt will be forwarded to them ASAP.

If your printer runs out of paper, you will be carrying spare rolls with you to replace it. The instructions for how to exchange the rolls is written on the printer itself.

## **EFTPOS machine**

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Like your other equipment, your EFTPOS machine requires charging overnight. If you require assistance with this task, please see the Office Manager.

To process a payment using the EFTPOS machine:

- (1) Swipe card, or insert card into slot for credit cards with a chip (the machine will prompt you to do so if this is necessary).
- (2) Enter a purchase amount. No decimal point is required.  
- for \$69.00 enter 6900, for \$49.50 enter 4950.
- (3) Press **Enter**.
- (4) When prompted, select an account. Ask the customer which account they would like to use.
- (5) The machine will ask: "Key pin or enter?" The customer can then enter a pin and press the green enter button. If the customer is paying via credit and signing, simply press **Enter**.
- (6) The machine will print a merchant copy of the receipt with a space for the customer to sign. You will need to verify their signature with the one on their card. At this point, if you are using the chip reader, you can remove the card.
- (7) Keep the merchant copy and press **Enter** for a customer copy of the receipt which the customer may keep.
- (8) Circle approved, which is printed onto the merchant copy receipt, and also the amount on both receipts.
- (9) On the back of the merchant copy you *must* write the customer number.

Place all merchant copy receipts in your work drawer at the beginning of the following day.

# Franchisee jobs and expectations

## ***Mandatory morning procedure (start of the daily run)***

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The following procedure is a list containing all of the duties to be completed each morning.

Finalising yesterday's run:

- Place old filters in the rubbish bin (must be after 7am)
- File all money, receipts and banking bags in your work drawer
  - EFTPOS dockets must be labelled with the customer number
  - Cash and EFTPOS must be reconciled (by pressing F 5 3), this should be done at the end of your run each day
- Upload the previous days run from (and download the current run onto) the iPad

For the current day you must:

- Download your run (this will have occurred at the same time that you uploaded yesterdays)
- Collect new filters from designated secure area
- Obtain any other spare parts, stationery that you may need
- Collect paperwork
- Input addresses into your GPS or UBD, if you choose to use these
- Attend morning information session held every working day
  - Inform the franchisee manager if you are unable to attend

Be sure to check customer bookings for special instructions before you leave to attend your jobs. For example, take note of:

- Special units or parts to be collected from the Puratap office
- Road or street directions
- Contact times or special instructions
- Any other relevant information helpful to doing the job
- Calibrate torque wrench weekly and record reading

## ***Appointment protocol***

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### **Time frames and waiting for customers**

SOP 0001 outlines the procedure for time frames and waiting at appointments.

It is permitted under the Franchise Agreement, Section 8.1.2 (Appendix A.1), to call customers on a run to reschedule them for a different time frame on the day. Keeping in mind:

- If the customer cannot change the time, the job must be performed at the time previously agreed on the booking

- Customers where the memos or plumbing comments state that the customer needed that specific time, or customers who have been particularly hard to book, are not to be called to reschedule

*Please note: you are not to call afternoon appointments before 10:00am on any given day.*

In the instance that a customer is not home when you arrive at the property, please observe the following procedures:

- You must wait a minimum of 10 minutes for a customer to be home within the quoted time frame.
- You must always ring all phone number(s) provided on the customer file. However, do not call customers if you have arrived at the property early.
- You must always leave a 'sorry we missed you' card (available from the Puratap office) in the customer's letterbox, indicating that you had attended the property and quoting the amount of time you waited for their return. You must be accurate with the information and times that you provide on the card.

## **On-site arrival procedure**

The following procedures are to be followed at the beginning of every single service call, regardless of the type of job you are to perform.

Upon arrival at the Customer's premises:

(1) The Van:

- Park in a safe area, preferably off the road. Do not obstruct driveways or footpaths
- Lock your vehicle when you are away from it, and keep all valuables out of sight
- Do not leave oil or fuel in a customer's driveway. If this happens, please phone the Franchisee Manager to let us know

(2) Arriving on site:

- Greet the customer in a friendly and professional manner
- Introduce yourself as a Puratap Franchisee and give the reason for your visit
- Ask the customer to show you to the unit
- Check with the customer to ensure their customer file details are correct
- Briefly explain to the customer that you will be going back and forth from your van, make sure that you invite the customer to ask any questions or watch what you are doing if they are interested.

(3) On sight of the purifier:

- Before touching the customer's unit, you must complete a pre-service checklist (SOP 0002).
- The visual inspection should take less than two minutes.
- If you do find anything abnormal, you must immediately show the customer the problem.

- If a Puratap plumber is required, immediately phone the office.
- The customer must sign the pre-service page on the iPad to verify that the problem existed before the Franchisee arrived
- Puratap suggests taking a photo using the iPad for proof of the problem.

**(4) Completing the job:**

You can then carry on with the appointment that has been booked.

Instructions for these can be found in the SOP section of this manual

- SOP 0008 – Complete tubing upgrades
- SOP 0006 – GI-2600 Puratap upgrade
- SOP 0003 – Filter changes
- Service – see next section

**(5) After the filter change/service:**

- SOP 0010 – After filter change check

**(6) Place a tap hanger on the tap for the customer**

- This must be done for EVERY job (irrespective of the job)

## **Service refusal**

Should a customer, refuse their filter change service on the day, no service is to be carried out. Additionally, no parts are to be given to the customer.

In the case that a service call is covered by warranty, this will be written on the plumbing memo for the job, however, if a filter change is refused there is to be no service performed – regardless of warranty.

Please call the Puratap office straight away with any questions regarding this policy.

## **Customer appointment inquiries**

Should a customer approach you to arrange an appointment, you must direct the customer inquiry to the office. All bookings must be made by a Puratap head office employee during Puratap business hours. Should you wish to service the customers unit yourself, please advise the office staff and we will endeavour to allocate the booking to your next run. As per section 8.1.1 of the Franchisee Agreement (Appendix A.1), no services are to be performed without the customer being directed to the office for processing.

## ***Types of filter changes***

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### **Businesses**

The procedure for changing the filters within a business is exactly the same as for a residential filter change – but with a few more points to remember:

- Be sure to speak with the most appropriate person – this is often in the plumbing comments
- Always ensure the company will be paying in the way outlined on your plumbing comments before commencing the work
- Collect the full name of the person who you spoke to
  - While getting this, confirm again they have the authority to allow you to do the work.

### **Multiple filter changes**

With customers that have more than one Puratap, we endeavour to give you as much information as possible as to which unit is which and where they are located.

In some cases, we do not know exactly how many units are at a premises, or where all of the units are located. Any information you can record in these cases will be helpful for arranging and performing future filter change, additionally, if you receive a map we can scan it and keep this information for next year.

### **Milk bottles**

Milk bottles is a term used to describe a customer removing their own filter unit and placing it outside for you do to a filter change. Milk bottles are booked for customers who cannot be home during the day for a filter change. The unit will already be disconnected and in a designated place outside for you to attend to any time during your working day – this location will be outlined in the plumbing comments. Please ensure that you return the unit to where you found it.

Payment instructions will be provided, for a milk bottle we can only accept a cheque left with the unit or credit card details which will be given to the office at the time of booking. It is against Puratap company policy for cash to be left for a milk bottle.

### **Upstairs units**

SOP 0004 outlines the procedure for performing an upstairs filter change.

### **Rainwater filters**

SOP 0005 outlines the procedure for performing a rainwater filter change.

It should be written in the plumbing comments if it is a rainwater filter change, however if you are unsure please check with the customer before doing the filter change.

## ***Reconciliation***

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For proper stock control and accounting, adequate time must be allowed for reconciling accounts.

- Franchisees will receive their job totals for the previous week from the office on Tuesday
  - Job totals should then be checked thoroughly by the franchisee
- The franchisee is to provide their invoice for the week to the office
- Payments will be processed by Thursday evening

If the job totals received do not match the franchisee records, you must immediately notify the Puratap accounts team with the specific concerns – e.g. job missing or job duplicated.

# Services

**Please note that for all services completed by Puratap franchisees, the relevant service report must be completed and returned to the office with any damaged parts. Failure to complete a service report for a job will mean that the job is considered incomplete and the service fee will not be paid.**

## **Warranty**

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All new Puratap units come with a warranty – but the warranty differs for some parts of the unit. The Puratap warranty is:

- **Stand alone tap – 3 years**
- **Mixer tap – 3 years**
- **Tubing – 3 years**
- **Jacos – 3 years**
- **Stainless steel pipe fitting – 3 years**
- **Ball Valve assembly – 3 years**
- **GI-2600 housing (head and sumps) – 10 years**

Please note warranty is dependent on an annual filter change being performed. By servicing the unit each year, we can inspect the parts and identify any potential problems. If we cannot service the unit, we cannot guarantee the warranty.

If you attend a property and do notice that any part of the system looks abnormal or damaged, you must advise the customer straight away. If the part is under warranty, you may replace it at no charge. If the part is not under warranty, it is your responsibility to explain all options to the customer regarding cost of parts and complete a pre filter change check sheet to record this fact (see SOP 0002).

## **Tap replacements**

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Tap services are the most common service request we receive. Often, the customer will report a tap issue to the call centre, in which case the relevant job and warranty details will be included in the plumbing comments for the job.

Sometimes a customer will wait until you arrive to inform you of a problem with their tap. If this happens:

- Find out whether the tap is under warranty

- By looking at memos in the customer file or calling the office
- Quote prices for replacement (if necessary)
- Repair or replace the tap
  - Repairs to taps are mainly limited to replacement of spouts in the base of the black plastic tap, the tee bar under the plastic handle can be adjusted up or down to better seat the handle. Puratap cannot replace O rings within a tap, only on the spout itself.

**NB: Puratap does not repair taps that are out of warranty.**

## **Tubing upgrades**

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Puratap tubing is covered by a 3 year warranty. If there is failure within that period of time, the tubing is replaced free of charge.

Outside of the 3 year guarantee, Puratap offers 2 types of upgrades:

**(1) Option 1:**

- Includes the Puratap brand tubing, jaco and stainless steel fitting
- Can be performed by a serviceman
- Can be discounted from \$52.50 to \$32.50 if done on the same day as a filter change

**(2) Option 2:**

- Includes the Puratap above-standard brand new tubing, jaco, stainless steel fitting and ball valve
- Needs to be performed by a plumber
- \$75.00

Whilst attending a customer's property, the tubing upgrade must be:

- Offered and carried out whilst on site if the customer accepts the upgrade
- Offered even if the customer has declined the option in the past
- Signed off by the customer if they decline the offer. If the customer refuses to sign that they have declined the upgrade, please write the name of the person and comment 'does not wish to sign'
- Sent back to the office with a follow-up note on the file if there was no time to offer the upgrade on the day, or if the suitable party was not present to discuss the offer
- **NB: if the customer has had a tubing upgrade previously, you should not offer it again. However, if a customer requests it, you can provide the service (for the retail price of \$52.50).**

Should you notice tubing which is old, discoloured or brittle, and the customer has declined an upgrade the unit must be turned off.

Never reuse old jacos/fittings on new tubing and all tubing should be changed at the same time, not just one tube.

## To complete a tubing upgrade

SOP 0008 outlines the procedure for a tubing upgrade.

### ***Tubing upgrades Spiel guide***

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Please refer to the following spiel as a guide to offering the tubing upgrade on the day.

***"Since your unit was installed, Puratap has designed stronger components – this includes our tubing, jaco and new non-corrosive stainless steel fitting. In addition to giving you piece of mind with the strongest components on the market, it will renew the warranty of these parts for another 3 years.***

***Because I'm already here to do your filter change I can do it all for you for just an additional \$32.50, instead of the usual \$52.50 that it would cost. How does that sound?"***

#### *HD Tubing*

SOP 0008 outlines the procedure for a HD tubing upgrade.

### ***Service Calls Puratap***

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When a system is reported as leaking a visual check of the entire area is the first thing to be performed. This check should identify where the leak is originating. Both the Puratap and the customer's own plumbing needs to be checked. Special attention should be paid to under the sink and below tap fittings, as these can leak onto a filter unit and make it look like the filter itself is leaking when in fact it is not.

If the leak is from a filter change conducted by yourself, you can pull the unit down to see if any obvious faults are found. For example, you should be able to see if there is a kinked 'O'-ring or a void in the head or sump sealing faces.

### **Returning Parts (Service)**

1. If the leak is originating from the unit – remove the existing unit and replace with a new one.

Any units that have leaked are to be returned to the office and:

- Be labelled with the customer number on masking tape on the back of the unit (not on the blue cap).
- Be placed next to (not in) the blue bin at the back of the Puratap office.
- Have jaco fittings left in the unit to enable the unit to be tested.

All other parts returned are to be:

- Placed in a plastic bag.
- Clearly labelled with the customer number.
- Either placed in the designated area or given to the Warehouse Manager.
- Parts that a service fee is being claimed must be given to Franchisee Manager in order for payment to be processed.

## **GI-2500 upgrades**

The GI-2500 was Puratap's old unit and is not as strong as the GI-2600. Customers were offered a free upgrade to the new GI-2600 in 2006, however, some still exist in the field as a result of factors which are out of our control.

Should you attend a property with a GI-2500, you *must* remove the unit. All GI-2500 units are to be swapped with the new model GI-2600 stored in your van.

Once you have successfully upgraded the old unit, you will need to complete a after filter change check. SOP 0010 outlines the procedure for a after filter change check.

## **Upgrades from a competitor**

SOP 0006 outlines the procedure for an upgrade from a competitors unit.

These will be booked on your run as an upgrade and further information will be in the plumbing comments.

When completing an upgrade it is particularly important to ensure pre and after filter change checks are completed and signed by the customer.

In every unit upgrade, you should also offer a tubing upgrade.

# Payments and invoicing

## ***Customer payments***

Unless stated in the plumbing comments for a job, all appointments are to be paid for on the day. By staying a payment-on-the-day business we can keep our prices as low as possible for our customers and retain ongoing business.

**Always ask the customer which method of payment they will be using prior to commencing the job.**

### **Residential**

Residential customers must pay by cash, credit card, cheque or EFTPOS on the day, unless they have given their credit card details to us prior to the appointment. In these cases, this will be specified in the plumbing comments for that customer, and you will not have to collect any payment on the day.

With the new iPad system, it is possible for a customer to split a payment between two or more payment methods. For example, if a customer has prepared \$73.00 in cash to pay for a filter change, and they have then accepted a tubing upgrade but do not have enough cash, they are welcome to pay for part of the service (in this case, the tubing) by credit card, cheque or EFTPOS.

***It is against Puratap company policy to invoice a residential customer.***

For the process regarding EFTPOS payments, please refer to page 46.

### **Business & real estate**

In many cases, business and real estate customers will have already paid or given permission to be invoiced for a service appointment. Again, this information will be specified in the plumbing comments and you will not need to collect any money on the day.

### **Invoice approval**

There are times when you will attend a property and, for whatever reason, the customer is unable to pay on the day, but is still keen to have the service.

In these cases, you may call the Puratap office to seek approval to invoice the customer. This means that you may still be able to complete the job, saving us time and resources in the office which we would need to spend trying to rebook this customer.

***Please note that invoice approval must be sought before starting the***

**job, not after.**

There are only a limited number of call centre operators who have authorisation to speak with you about approving an invoice. Please specify this as your request to the receptionist so they can direct your call appropriately.

*Please note: if the above procedure is not adhered to, the Franchisee may be liable for any outstanding payments that the customer has failed to provide after being invoiced without permission from the Puratap office, or may not be eligible to receive the Franchisee Service Fee, in accordance with section 8.2.5 of the Franchisee Agreement (see Appendix A.1).*

## ***Franchisee accounts***

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### **Banking**

It is the responsibility of the Franchisee to reconcile, turn in and correctly record their banking each day.

Every day you must complete the following tasks in regards to banking:

1. Pack and seal your banking bag properly. If you need help the accounts department will be happy to help you.
2. Make sure you display the correct cash distribution on the banking bag.
3. Make sure the cheque listing is correct and matches the cheques in the bag.
4. If you ever find a discrepancy when packing your bag, you *must* notify Puratap immediately.
5. Ensure that the bag is packed properly. Cheques should always be packed with the deposit slip at the front.
6. At the end of the day, print your EFTPOS settlement and reconcile this with the EFTPOS totals displayed on the summary sheet of your iPad. Any discrepancy should be reported to Puratap immediately. Follow this step for cash and cheque reconciliation also.
7. Match your Franchisee fee for the day with the total printed on your summary. Again, Puratap should be notified of any discrepancy immediately.
8. Leave your bag in your tray in the Franchise Manager's office.

Please do not hesitate to contact the accounts department with any questions relating to banking.

### **Invoicing Puratap**

Payment for work performed is completed by invoicing Puratap. All servicemen are to issue all invoices to the admin pigeon hole or email address (admin@puratap.com) by 9am on Wednesday morning. If the invoice is not

issued to Puratap in time, payment will be delayed to the next cycle.

Invoices must include the following information:

- Amounts GST inclusive and exclusive
- Date
- Invoice number
- Name of company
- Number of filter changes and service calls completed

It is vital that invoices issued to Puratap are correct – incorrect invoices will result in an administration fee as time must be taken to rectify the issue. Standard charges for work can be found below.

## **Money owed to Puratap by Franchisees**

On occasion, money can be owed to Puratap by the Franchisees. This can include:

- Lawyer fees from DMAW for set up or renewal costs
- Customer refunds and claims

In these cases, Puratap will pay the customer/provider and then create an invoice to the franchisee to recoup the cost.

## ***Standard Fees***

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Please refer to the list below for the standard franchisee fees for each type of service.

### **Filter changes**

GI 2600 Filter change	<b>\$14.00</b>
GI 2700 (rainwater) filter change	<b>\$20.90</b>
Half rainwater change (single cartridge change)	<b>\$14.00</b>

### **Services**

Service Fee	<b>\$13.23</b>
HD Tubing upgrade (if under warranty)	<b>\$10.00</b>
HD Tubing upgrade (not under warranty)	<b>\$15.42</b>
Tap	<b>\$13.23</b>

### **Combinations**

Tap & tubing upgrade & filter change	<b>\$42.65</b>
Tubing upgrade & filter change	<b>\$29.42</b>
Service & filter change	<b>\$27.23</b>
Tap & filter change	<b>\$27.23</b>
Rainwater filter change & tubing upgrade	<b>\$36.32</b>
Rainwater filter change & tap	<b>\$34.13</b>

Please note that these fees are set and non-negotiable. Should you believe

that for any reason a job warrants an altered fee, this must be discussed with the Franchisee Manager **before** completing the job.

## SOPs

### ***SOP 0001 – Appointment protocol***

**Version 2 – Revised 2 January 2014**

#### ***Standard Operating Procedure for timing of appointments***

The customer you are calling on to conduct a filter change, service or installation has arranged a time for you to call, because that is the most convenient time for them to be home. The time frame specified on the booking has been discussed with the customer and the expectation is that they will be there for the whole time frame.

#### ***Pre-arranging a different appointment time***

Should there be a situation where it would be advantageous for you to do a job at a different time – for example two houses in the same street, but booked on at different times of day – it is acceptable for you to contact the customer to attempt to change the booking time. This is allowed for under your Franchise Agreement, however there are some caveats on this. These are:

- No afternoon customers are to be called to change bookings before 10am
- Information regarding contacting the customer on the booking must be noted – for example shift worker, dropping off/picking up kids, or 'do not call before XX time'
- ***If the customer can not change the time of the booking, the original time frame must be honoured***

#### ***Customer not home during appointment time***

Should you attend a customer's property during the correct time frame and they are not home (or there is no answer at the door), you must:

- Wait at least 10 minutes into the appointment time before leaving
  - For example, if the appointment is booked for 3–5 and you arrive at 3 (or before), you must wait until 3:10 before leaving
- Ring all phone numbers on file for the customer
  - Make a note of what numbers you called and at what time on the appointment
- Leave an official Puratap calling card in their letterbox (or neatly at their door) to let them know you have been there

**Version 2 – Revised 17 December 2013**

**Standard Operating Procedure for pre-filter change checklist**

**Before touching the customers water purifier you must go through a rigid checklist to ensure that you protect yourself from unnecessary and avoidable claims.**

The checklist is designed to assist the customer to take action should it be required.

The visual inspection will take less than two minutes and the customer will appreciate your thoroughness.

**1. Open Cupboard doors**

- a) Do not touch anything just observe

**2. Use a torch to check all plumbing connections**

- a) You are looking for greening or whitening of any connections
- b) Or any damage such as cracking, distortion or buckling
- c) Look at all braided lines, tees, and tap connections



*Figure 1: examples of damage and greening on a copper fitting*

**3. Run your hand along the bottom of the cupboard to check for moisture and/or pre-existing water damage**

- a) Take extra care when there is 'floating floors' in the kitchen – these are more prone to damage from even a small amount of moisture

**4. If any existing damage is present**

- a) Stop work immediately and show the customer the problem

- b) Take a picture and have the customer acknowledge this damage by signing on the pre-filter check sheet
- c) Offer the relevant solution to the customer
  - If damage is caused or possibly caused by a leak from the Puratap product – **Please notify the office** – Take pictures of damage and a full report via “Pre-Filter check”
  - If leaking from “Own” Plumbing components offer Puratap plumber at a \$45.00 call out fee and the Plumber to quote any extra for parts / extra labour
  - The customer may use a plumber of their choice but this will probably cost them more
  - If leaking from Puratap - “Under warranty” - complete repairs as required (book a plumber if not possible to fix eg. Ball valve) If “Not under warranty” offer upgrade as required and complete whilst on site where possible or office follow up if plumber required.
  - If the customer accepts the offer of a Puratap plumber you must call the office immediately to arrange it
  - If the unit is leaking you must isolate the ball valve system, ensure the plumber is booked to attend advise the customer to leave the unit isolated until the plumber attends – **You must never leave a leaking unit. Always isolate the unit.**
  - If no damage is present, you may continue servicing the purifier. **If a leak is found, ask the customer to sign off on the pre-plumbing check sheet to verify the problem existed before you commenced work.**

**Version 4 – Revised 10 October 2014**

### ***Standard Operating Procedure* for filter changes**

The procedure for a standard filter change is as follows. Please make sure that if a customer is interested in the process, you invite them to come to your van with you and watch how you do it.

#### **1) Complete the pre filter change check (as per SP 0002)**

#### **2) Isolate the unit**

- Turn the filter tap on to run the water then isolate the unit by turning off the ball valve. Handle the ball valve gently. Use one hand to hold the ball valve while turning it off with your other hand.
- When the water stops running from the tap, turn off the tap

#### **3) Remove the unit**

- Unscrew the white plastic jaco nuts on each side of the unit
- Remove the unit from its location and take out to your van
  - Please be aware water will drip from the jaco bolts left in the unit, cover these with your fingers to avoid wetting the customer's floors.

***NB: All GI-2500 units shall be withdrawn from customers who have them. They are to be swapped with the new model GI-2600 for the cost of a filter change.***

#### **4) Open the unit**

- Place the unit in the sump opening tool (jig) fitted to the rear of your van
- Use the torque wrench (calibrated to 25 Nm) to release the sums from the head of the unit
- Open both sides of the filter unit, carefully remove the filter sums and pour the water out into the customer's garden or a nearby drain/gutter

***NB: A unit that is difficult to open (very tight/over tightened) will require the sums and O rings to be replaced (under warranty), with the sums being returned to the office clearly marked with a customer number and the reason for returning them. However, if a unit has a 'split sum' the whole unit should be removed and returned to the office – unopened and as it was found. Both of these scenarios should be accompanied by a service report.***

#### **5) Remove the filters**

- Carefully unscrew (anti clockwise) the filters from the head, be careful not to pull the filter from the screw top cap
  - If the top cap does become lodged in the top of the head, use the extraction tool to unscrew it

- Place the filters in your bin

## **6) Sanitise the unit**

- Using sanitation liquid, spray into the head and the sumps and allow the excess liquid to drain
  - Take care to avoid spraying directly onto the threads of the Head and Sumps.

## **7) Refit the unit with new filters**

- Sediment to the inlet side, carbon to the outlet side of the head
- Ensure on carbon filter the net is not hanging over sump head thread. Trim back or tuck net in if hanging over sump head thread, to prevent leakage (The net will catch on O ring and cause a slow leak after 5 minutes if not trimmed or tucked in)
- Check to make sure the O rings in the sumps are seated correctly. If the O rings have been flattened replace them.

**NB: the filters seal with the double O ring, not the threads being tight. The filters are to be screwed up to the stop point and no further – do not over tighten the filters into the head.**

## **8) Replace sumps into head of unit**

- Replace both sumps by hand and stand in the sump jig
- Using the torque wrench very slowly, tension head to the sump until the wrench clicks
  - Use the torque wrench in a smooth and controlled sweep that shall be 2 seconds duration per sump
- **DO NOT OVER TIGHTEN** the sumps
  - Over tightened sumps can crack the threads bringing about premature failure

**NB: You must tension the head slowly to ensure your momentum does not tension the head too far (do not jerk the unit closed). A ½ mm over tension will bring about increased stress on the base of the threads. If you are not sure, reverse the torque wrench and undo the sump, if the wrench clicks and there is no movement of the head from the sump it is too tight and requires loosening and to be re-tensioned.**

**If Units are returned to the office and found to be over tightened it will be considered a Breach of Franchise and you will receive the appropriate warning.**

## **9) Return the unit to the customers sink**

- Reconnect the tubing to the inlet side of the unit and connect your flushing length of tubing to the outlet side
- Open the ball valve and run the first couple of litres of water into a bucket to clear the carbon
  - This is to clear the majority of the carbon dust from the unit so it is not caught in the tap causing them to drip.

- Once clear, turn the ball valve off and disconnect your tubing
- Reconnect the customers outlet tubing to the unit
- Open the ball valve and run the unit for a few minutes to continue clearing the water of carbon and air. Handle the ball valve gently. Use one hand to hold the ball valve while turning it on with your other hand.
  - The air makes the water look cloudy, if the customer is concerned inform them they can fill a glass and watch the bubbles rise to the top

## **10) Arrange payments and paperwork**

- While the tap is running (if the customer prefers not to waste the water request a bucket) complete the payment details
- Have the customer sign off for job completion on your iPad
- Once completed, turn the tap off.

## **11) Complete a after filter check (as per SOP 0010)**

## **12) Show customer ball valve**

- Before you leave, check the unit again for leaks and show the customer where the ball valve is located

Please ask the customer to check for leaks in 2, 12 and 24 hours – place a tap hanger on their tap to remind them. If they are going away on holidays, ask them to isolate the unit with the green handled ball valve. This routine shall apply to schools and offices on Fridays.

**Do Not Leave** a customer's house with a tap running. After filter change completion turn the tap off. Advise them the water will have a cloudy look about it and if they want to speed up the flushing process they can run the tap for a while.

## **SOP 0004 – Filter changes for units upstairs**

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**Version 3 – Revised 15 January 2014**

### **Standard Operating Procedure for Puratap filter changes for upstairs units**

Filter changes for units installed upstairs are of concern as they pose a greater risk of damage if there should be a leak. Therefore the following shall apply to all filter changes for units located upstairs:

- Be especially careful to make sure all connections are secure and free from any leaks or seepage
- The unit shall be run to clear the carbon and make sure everything is sound
- If a customer is going to be away after the filter change the unit is to be isolated at the ball valve
- If the customer wishes to use the unit, show them the ball valve and how to turn the unit on and off. The customer shall be told they are to isolate the unit when they have finished
- The unit shall not be left on and unattended for any length of time
- Be sure to wipe the area after a filter change to ensure no residual water is left in the cupboard where the filtration unit is located

The customer is to be reinforced to check for leaks in 2, 12 and 24 hours, and sign off that they have been told.

**Version 1 – Revised 09 September 2013**

**Standard Operating Procedure for Puratap filter changes for rainwater units**

Puratap now offer the option of water filters for premises using rain water for their drinking supply. The rainwater system uses ultrafiltration membranes to remove anything larger than 0.01 of a micron (1/100,000<sup>th</sup> of a mm) – this filter will remove the viruses and faecal coliforms that pose a health risk in rainwater tanks.

The rainwater units can be identified by their green lid (rather than the usual blue lid), and are itemised in FoxPro as the Puratap GI-2700. The tubing used for the rainwater system is also green and made from high-density polyurethane. There is no requirement for a back flow prevention valve – this shall be removed and replaced with a 1/2" x 1/2" nipple.

The filter change procedure is the same as for a normal Puratap GI-2600 (as outlined in SOP 0003), with the following exceptions:

- The unit contains a carbon filter and an ultrafiltration filter – there is no presediment filter
  - Carbon filter is on the inlet side and the ultrafiltration is on the outlet side
  - The carbon filter needs to be pre-flushed prior to the filter change so as not to foul the ultrafiltration filter with carbon particles
- If the water is diverted (sometimes on rainwater and sometimes on main water), or if the customer has particularly high pressured rainwater, a pressure-limiting valve (PLV) must be fitted
  - The rainwater filter is rated to 65 PSI/450 kPa/4.5 bar
- Cost of the GI-2700 filter change is \$109.00
- Cost of upgrading to a GI-2700 from a GI-2600 or competitors unit is \$149 (this includes a PLV)

There have been some situations with rainwater filters fouling quickly and this is generally due to rainwater tanks being insufficiently maintained. If a customer contacts the office to say that the rainwater filter is not working we will need to perform a half filter change. This entails:

- Replacing the ultrafiltration filter, but not the carbon filter
- Cost is \$59
- If you are doing a half filter change, please explain to the customer the importance of tank maintenance for the optimal performance of the unit
- At the initial installation, and every filter change, the customer must be shown and asked to sign a disclaimer to reinforce the above points.

**Version 3 – Revised 15 January 2014**

### **Standard Operating Procedure for Puratap upgrade from opposition products**

There are a number of different options for customers that are looking to upgrade to a Puratap from a competitors unit:

- **GI-2600 upgrade** includes replacing the unit only – non P/T parts disclaimer to be signed by client. No warranty on any existing/non-Puratap plumbing.
- **GI-2600 upgrade with option 2** includes replacing the unit, ball valve assembly, tubing, jacos, and stainless steel pipe fittings. A 3 year warranty is given on these upgraded plumbing parts. NB – this upgrade does not include replacing the tap. No warranty on any existing/non-Puratap taps.
- **GI-2700 upgrade** includes the GI-2700 unit, HD tubing and a pressure-limiting valve. A disclaimer must be signed with a rainwater upgrade.
- **Complete upgrade of all components** includes replacing the complete system, tubing, pipe fittings and jaco, ball valve assembly and tap. Full warranty applies – This is essentially a complete new install but price is discounted as client has changed to Putatap

**NB: Upgrades with option 2 and complete upgrades involve replacement of the ball valve and therefore must be performed by a plumber. If you notice that one of these jobs has been booked on your run in error, or if a customer decides while you are there that they wish to have a higher level upgrade, you must call the office immediately to have a plumber arranged.**

To upgrade the customers unit:

#### **1) Confirm with the customer what level of upgrade they require**

Specifically, advise the customer what parts you will and wont be changing, and what warranty implications this will have

#### **2) Complete a pre-filter check (see SOP 0002)**

Pay particular attention to any components that will not be upgraded and make sure you have the customer sign off on any of these parts

#### **3) Remove the competitors unit and any parts that will be replaced**

- If removal of the competitors unit is not easy or a process for it not readily apparent please contact the office – do not attempt to break/force out a unit
- Unless the customer wishes to keep it, please bring the old unit back to the office as competitors units are useful for testing and training

#### **4) Replace the removed parts with Puratap products (as per SOP 0003**

**and SOP 0007)**

**5) Complete a after filter check (see SOP 0010)**

## **SOP 0007 – Offering Tubing upgrades**

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**Version 4 – Revised 17 December 2013**

### ***Standard Operating Procedure* for offering tubing upgrades**

#### **Offering the upgrade:**

Whilst attending a customer's property that has not previously had a tubing upgrade, it must be either:

1. Offered, accepted and carried out whilst there
  2. Offered, declined and the customer's signature and name collected
    - a) If the customer does not wish to sign, please write the name of the person on the form (even if it is first name only) and comment "does not wish to sign"
- If time or situation does not permit either of the above you must:
    - send back to office a 'pre filter/plumb check sheet' stating 'no time please follow up' or 'no one there to speak to regarding tube upgrade, office to follow up' etc. depending on situation

***If a tubing upgrade has been performed previously do not offer it again, it can be done if the customer requests it.***

## **SOP 0008 – Completing Tubing upgrades**

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**Version 1 – Revised 25 March 2014**

- **Standard Operating Procedure for completing tubing upgrades**

### **1) Complete a pre-filter check (see SOP 0002)**

### **2) Removing a jaco/stainless steel pipe fitting from the ball valve**

First step is to remove the old jaco/pipe fitting from the ball valve. To do this:

1. Turn the ball valve to the off position. Handle the ball valve gently. Use one hand to hold the ball valve while turning it off with your other hand.
2. Secure the ball valve with an appropriate tool (e.g. multi grips or shifting spanner)
3. Remove the jaco/stainless steel pipe fitting by twisting/unscrewing
  - If the fitting splits and breaks away you are required to remove the remaining fitting from within the ball valve before continuing
    - Insert an extractor spanner (ease outs) into the remaining part of the fitting
    - Turn the extractor anti-clockwise into the fitting (the action of turning the extractor into the ball valve will remove the fitting)
    - (**If unable to remove fitting from ball valve ring the office to arrange a Plumber to attend and leave ball valve isolated**)
4. Clean the ball valve to remove any discolouration caused by the old fitting and screw a  $\frac{1}{2} \times \frac{1}{4}$  nipple into the ball valve to clean the threads on  $\frac{1}{4}$  inch ball valves only
5. Attach tubing to stainless steel pipe fitting as per normal fitting procedures.

### **3) Removing a connections from the tap and unit**

Second step is to remove the old jacos from the tap and from the unit. **Never reuse old jacos/fittings on new tubing and all tubing should be changed at the same time, not just one tube.**

To do this:

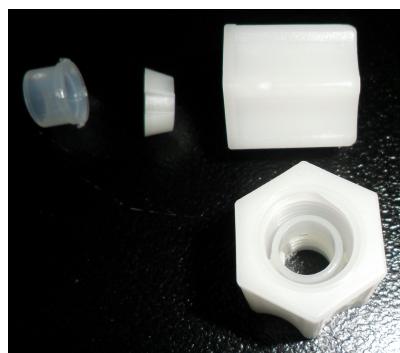
1. Unscrew the nut and olive from the tap shank

2. Unscrew the jacos from each side of the Puratap unit

#### **4) Replacing the tubing and jacos/stainless steel pipe fitting**

Finally, the tubing, jacos and stainless steel pipe fittings must be replaced and the unit returned. To do this:

1. Cut 2 lengths of tubing and attach a jaco to one end of each piece
  - Ensure the tubing is the correct length, the old tubing can be used as a guide if needed
2. Tubing that is too short or too long increases the risk of issues in the future
3. Attach the stainless steel pipe fitting to the other end of one of the pipes and leave the end of the remaining pipe bare
4. Ensure that the “gripper” and “olive” are seated within the jaco nut – even with the stainless steel pipe fitting



5. Screw the two jacos into the unit
  - The tubing with the stainless steel pipe fitting is the inlet (left hand side if the logo on top of the unit is facing you)
6. Tighten the nuts attached to the tubing finger tight then one complete spanner turn
  - Connect the inlet pipe to the ball valve in the same way as the jaco fittings
  - Connect the outlet tube to the tap
  - replace “1/2” olive with “full” olive at tap connection, tube “splint” not required with 2mm wall tube
7. When unit is fully reconnected, test for correct operation and complete a post-filter check (see SOP 0010)

#### **HD tubing (green tubing)**

If a customer has called after an installation or tubing upgrade to complain of flow restriction to their unit, they can be upgraded to HD tubing.

- HD tubing upgrades are to be completed **only** in cases where a customer has called to complain about the flow restriction in their unit after having a tubing upgrade.
  - Check the flow rate regarding the manufacturers guide. If between 1-3 litres per minute optimal filtration is being achieved and thus HD tubing upgrade is not covered under warranty.
  - **If a customer requests faster flow and the flow rate is within the guidelines please charge the customer the upgrade price of \$32.50**
  - Under no circumstances should a HD upgrade be offered or performed if the customer has not contacted Puratap previously about their concern
- A 'slow flow' upgrade includes the wider HD tubing only, and is used when a customers flow rate is below the specified 1-3 litres per minute after completing a recent option 1 upgrade.
- A 'complete HD upgrade' includes the wider HD tubing (of 1mm thickness) and also the jacos. This upgrade is to be used when a customer has not had a recent tubing upgrade and still complains of a slow flow rate from their filter system.
- No tubing is to be used through walls - **Copper piping only**

Please note: Whenever using 1mm tubing, you *must* also install a spigot or splint to ensure that the tubing is secure. Also, as HD tubing is more rigid, you must allow extra 'loop' in the tubing on installation.

## **SOP 0009 – Replacing a Tap**

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**Version 1 – Revised 25 March 2014**

### ***Standard Operating Procedure for changing a tap***

#### **To replace a tap**

1. Isolate the unit. Handle the ball valve gently. Use one hand to hold the ball valve while turning it off with your other hand.
2. Remove the tubing from the tap shank. You do not need to remove the tubing from the unit, unless you are completing a tubing upgrade at the same time – this should be offered if not already done, **if tubing upgrade has been declined you must replace outlet tubing to the tap with new thick wall tubing and new nut and tap olive**
3. Undo the nut that secures the tap to the sink
4. Remove the old tap and replace with new tap
5. Secure new tap to the sink with the new nut-and-lock washer
6. Re-attach the tubing
7. Test for correct operation and complete a after filter check

Please note: it is against Puratap policy to replace a tap, whether it is under warranty or not, if the filters are due or overdue to be changed, and if the customer has refused the filter change service.

## **SOP 0010 – After filter change check**

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**Version 2 – Revised 17 December 2013**

### **Standard Operating Procedure for after filter change check**

**After performing a filter change or service, you must ensure that the after filter change check list is completed.**

1. Run the system until water runs clear – switch off and allow system to re-pressurise
2. Check system and all connections for leaks
3. Dry around the Puratap ensuring the whole area is completely dry
4. Ensure customer is aware of the isolation valve and its function
5. Have the customer sign off to acknowledge the need to check for leaks at 2, 24, and 48 hours – as mains pressure can vary during the day and night
6. Place a tap hanger on the tap to advise customer of system check procedure and our contact details should they need them

The number of leaking units discovered at service calls after filter changes is only 2 in 10. The other 8 out of 10 instances therefore, involve the customer being led to believe there is a leak due to the presence of moisture in their cupboard. For this reason it is vital that you ensure that the area is completely dry before you leave.

Please note that service calls that arise due to not following the after filter change check list above, particularly not drying the area thoroughly, will not be reimbursed by Puratap.

## **SOP 0011 – Ball valve assembly**

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1. Check ball valve for leaks if leaking at nut behind handle use 13mm spanner to tighten.
2. Hold ball valve in one hand using 13mm spanner tighten nut behind handle (as per diagram) until tight.
3. Check to see that leak has stopped.

**Ball valve assembly**

