



Field Technician SOP

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Tech Tablet Procedures

PURPOSE:

This is to guide a technician on the proper procedure for work order/tech anywhere usage from the start of a job until completion.

RESPONSIBILITY OF:

Technicians

DAILY RESPONSIBILITIES:

Sampro Training Videos:

<https://drive.google.com/open?id=0B1vOpKKtAL3saFI5WHhjUHJJdm8TechAnywhere>

1. Tech shall **acknowledge** their work order prior to moving to the location. Tech shall also review all Work Order Information for details pertaining to the location and the work requested. If this is a return trip for a parts job technician must check and confirm that they have the parts before arriving at the location.
2. Tech anywhere status will be updated to **TRAVEL** when in route to the location.
3. Tech anywhere status will be updated again, to **ON-SITE** on arrival once parked at location.
4. Once a piece of equipment in need of service is determined, Tech will go to tech anywhere and add the existing piece of equipment, (if not already selected by dispatch) to determine any prior history that may be relevant to the current call.

5. Tech will go to **Document Management in the main work order menu for tech anywhere** and add any necessary photos or videos, as it relates to the current work ticket. (Damaged equipment, important information)
6. Tech will go into **Equipment/Service** to document all labor, material(s), and work performed per piece of equipment.
 - a. Tech will update any model and serial #s, if incorrect or if necessary. (You must verify that the equipment already exist in tech anywhere)

DAILY RESPONSIBILITIES (CONT.)

1. Tech is responsible to contact Logistic Coordinator if any equipment is duplicated in the system, to have equipment history combined.
2. Tech is to add any necessary material needed to be quoted, including the time frame and part(s) information into the **Marketplace** Cart for the specific piece of equipment (REMEMBER EACH EQUIPMENT NEEDS A SEPARATE CART).

Effectively Drive T & M Revenue Through Proper Documentation

1. If unable to attain part(s) information from manufacturer prior to closing out, Tech must save the open cart and leave the cart in the (UNFINISHED STATUS). Once you receive all the information needed OPEN the Marketplace APP, look for the open cart and enter the information and submit the cart to procurement.
2. Any priority shipping requests must be called into the Parts Department, in addition you must change the priority status in Tech Anywhere to indicate that these parts needed to be ordered priority.
3. Tech is to **Generate Receipt** and review work performed with customer, including labor, material used, and work performed. Customer is to sign tablet and an email MUST be sent to the customer.
4. Tech is to change status to **Completed** (job 100% complete), **Waiting Parts** (parts needed to be ordered/quoted), or **Rescheduled** (need to return, but no parts needed). If the incorrect status is selected technician must contact the LC department immediately.

5. Tech is to contact office within 5 minutes of completing a call to get to the next stop.
(If a new call is not released)
 - **If the end of a service call, Tech is still responsible to contact the office and confirm they are clear to head home, and the tech must follow the L/C's instructions.** (communication is expected not optional)

STANDARD OPERATING PROCEDURE FOR PAYROLL REPORTING

1. The pay week will start on MONDAY and end on SUNDAY.
2. Field personnel will ensure that their ticket times and overhead tickets are correct & submitted in the system at the end of every day. (NOT THE FOLLOWING DAY)
3. Field personnel must check their daily Technician Time sheet Verification Report every morning and make any corrections needed by 10:00 AM.
4. Field personnel must check their weekly Technician Time sheet Verification Report every Monday morning and make any corrections needed by 10:00 AM. (Failure to do so may result in paycheck discrepancy)
5. Field personnel must correctly record the time for team members that are not the completing the work order(s) for the job(s) or do not have access to Tech Anywhere.
6. Team members that do not have access to Tech Anywhere are required to contact the dispatcher to make adjustments on their overhead tickets.
7. Once the report is generated, on Monday at 10:01 AM, and delivered to the Service Manager, it will be final. No corrections will be accepted until the following week.
8. Corrections to a team member's payroll that are a result of their failure to properly record their hours will need to be corrected in the office, in person, before or after their shift.

PURPOSE:

- To create complete checks and balances to ensure Technicians are receiving parts, for both jobs and truck stock, in a timely and accurate manor

- All parts leaving the facility are 100% accounted for, and no parts shall be distributed without the appropriate signatures
- To maintain a safe and secure warehouse at all times.
- To have a “file system” to reference any and all parts that have left the facility.

RESPONSIBILITY OF:

The Service Managers are to implement this procedure. Field Managers/Supervisors are to follow-up on this procedure. Also, Technicians, Purchasing, and Warehouse Team Members are to adhere and not deviate from this SOP.

SECTION 1: TECHNICIANS DISPATCHED TO PICK UP PARTS FOR JOBS/TRUCK STOCK

1. All parts will be picked by a Warehouse Team Member from a re-order report or the copy of the work order from LC's. It shall be checked for accuracy and given to an associate sitting at the receiving desk.
2. The signature of the Picker and Desk Personnel is needed for verification purposes. Technician must verify that all parts were provided for completed orders
3. The Technician's name is to be labeled on the part(s) with large visible sign-age by the Picker.
4. Picking up parts:
 - Technicians are to check in at the outer receiving desk to both pick up parts for jobs and truck stock. prior to entering the office each line item each line item must be signed.

SECTION 1 (CONT.)

- Technicians are to also drop off any parts being returned for any reason, (warranty, damaged, unused etc.) Each part must be labeled with the work order number prior to returning the part.
- At this point, the Warehouse team member at the desk will give the Technician all of the parts, ask for verification that they were picked completely/accurately, and have

the Technician sign all paperwork for the parts. The technician is now responsible for the parts.

1. Copies of all paperwork are to be maintained at the outer receiving desk. Re-order reports are to be given to any Warehouse/Purchasing Team Member to adjust the inventory, while copies of work orders are to be given to Dispatch to change inventory status.
2. When picking up parts for jobs, Technicians will also pick-up truck stock pulled. If they do not have any truck stock, they should ask if their re-order report has been run. If in fact it has not been run, it is Purchasing's responsibility to run the report and a Warehouse Team Member to pull the parts. (LC must notify warehouse and submit the request prior of the technician arriving.
- When picking up parts for jobs, Technicians should also pick--up truck stock pulled. If they do not have any truck stock, they should ask if their re--order report has been run. If in fact it has not been run, it is Purchasing's responsibility to run the report and a Warehouse Team Member to pull the parts

SECTION 2: UNAUTHORIZED PERSONNEL/SECURITY/SAFETY

1. No Technician should be allowed to pick their own parts or have access to the main warehouse without managements approval. The Tech should be accompanied by an appropriate staff member at the receiving area. They can go through the main entrance only to see their Service Manager and should not drop off any parts without notifying a Warehouse/Purchasing team member.
2. Under no circumstance should any non-employee be allowed anywhere in the facility. All visitors should check in at the main entrance and solicitation is prohibited.
3. The warehouse should be maintained and held to the highest safety standards at all times. **6**

Parts for Field Pick-up

The process for receiving parts by technicians at supply houses, receiving parts on site from the company driver and parts picked up after-hours.

PURPOSE:

- To gain complete control of the entire process
- Eliminating delays, closing the books at month's end
- Timely invoice payments
- Assure Technicians receive all of their job parts assigned by dispatch, assure they are the correct parts and when at a supply house, only those parts on the purchase order are picked up and correct
- Update work order status in real time
- Proper inventory maintenance

RESPONSIBILITY OF:

The Service Managers are to implement this procedure. The Field Managers/Supervisors are to follow-up on this procedure, while Technicians, Purchasing, and Receiving are to adhere and not deviate from this SOP.

SECTION 1: TECHNICIAN AT SUPPLY HOUSE PICKING UP PARTS FOR A SPECIFIC JOB

1. Technician is to contact LC that they are unable to complete their job, due to lack of a part(s). BEFORE TRAVELING TO THE LOCATION.
2. LC shall notify Purchasing of procedure 1, above.
3. Purchasing will locate the closest Supply House to obtain the needed part and will notify L/C of name/address of where to pick-up the part(s).
4. A purchase order is created and the technician/supply house receives notification that the part(s) can be picked up, with no additions. Procurement will provide PO's

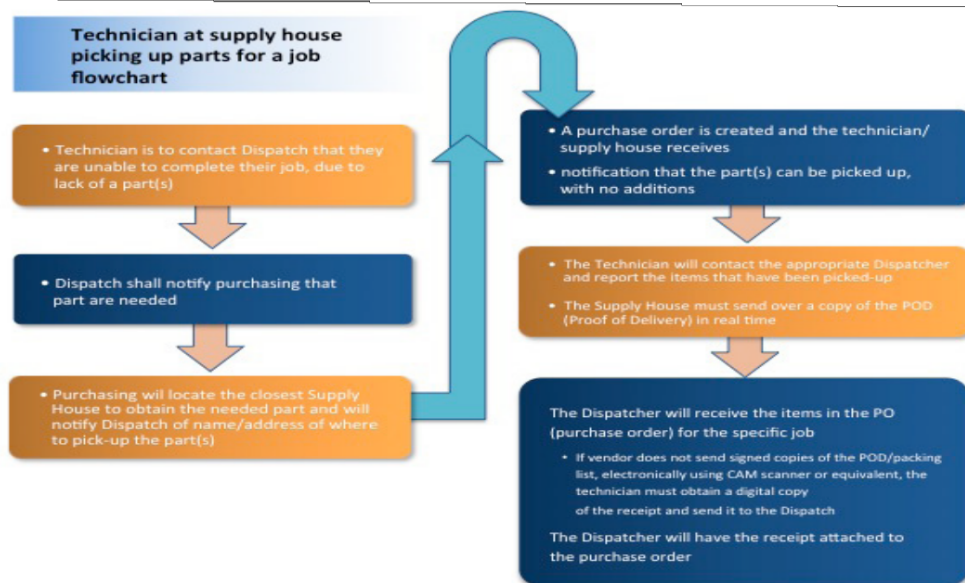
before for the technician arriving.

5. While picking up parts at supply house please conduct yourself in a professional manner as you are representing the company.

SECTION 1 (CONT.)

1. Upon obtaining the required parts from the specified location, the Technician will contact the appropriate L/C and report the items that have been picked-up. The Supply House must send over a copy of the POD (Proof of Delivery) in real time.
2. The L/C will receive the items in the PO (purchase order) for the specific job. If the vendor does not send signed copies of the POD/packing list, electronically using CAM scanner or equivalent, the technician must obtain a digital copy of the receipt and send it to the L/C.

The L/C will have the receipt attached to the purchase order.



SECTION 2: PARTS PO GENERATED BY TECHNICIAN IN THE FIELD

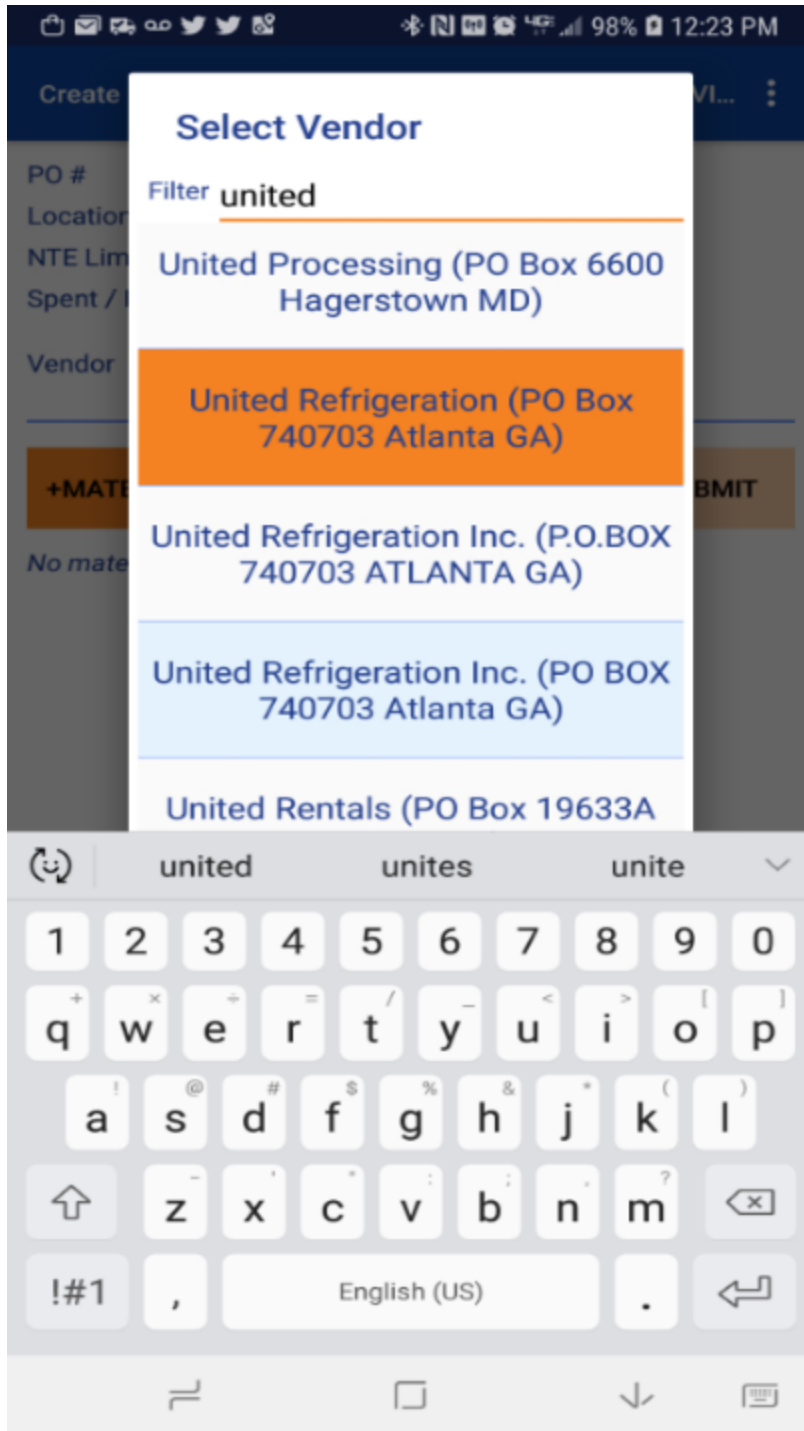
- There will be times where it is appropriate for the technician to generate a PO utilizing the Purchase Order function in TechAnywhere. These shall be used for

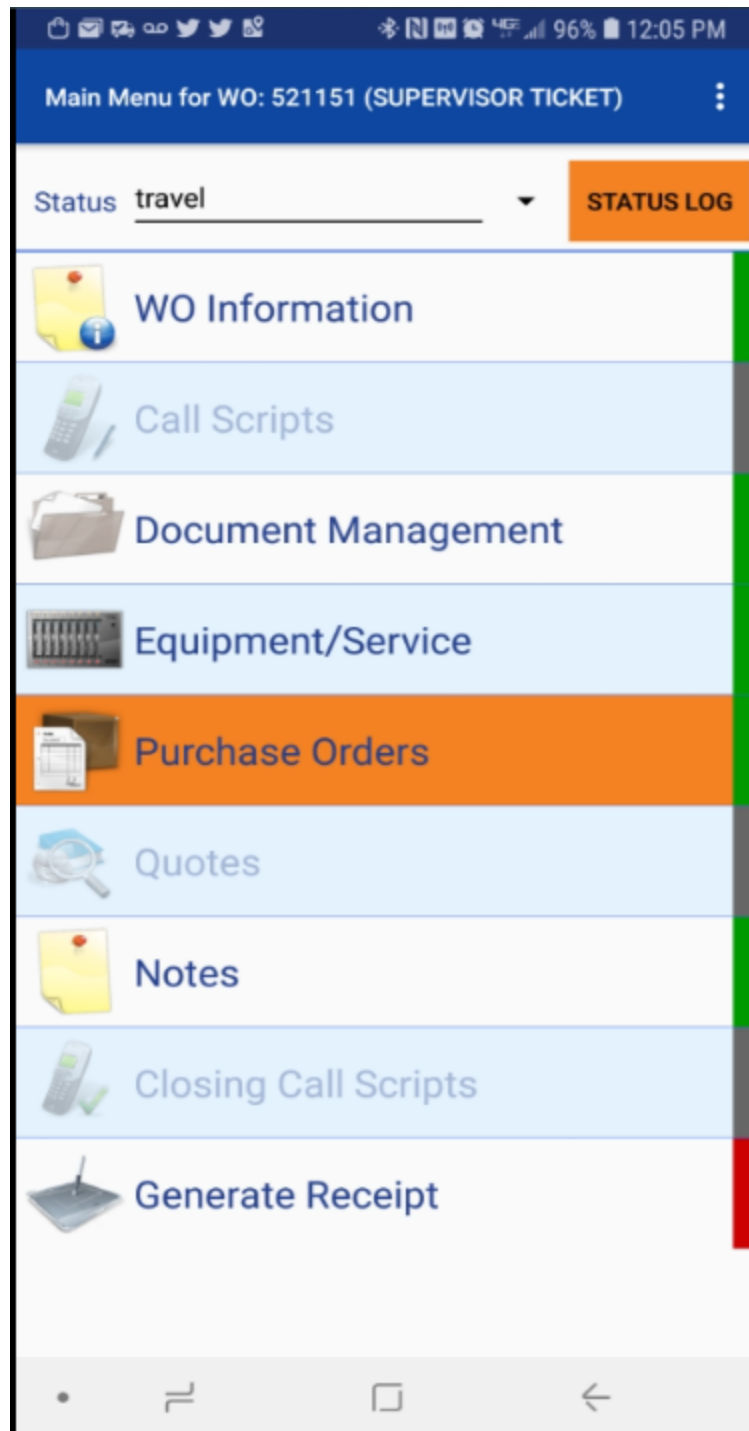
same day fixes **ONLY**, any parts order will need to be done using the Parts Ordering Procedure above.

- Tech spending cannot exceed 400, the supervision could buy less than \$ 1000 Parts.
- Need criteria for the job that needs to be quoted or if customer request not to quote on exceptional base, what kind of records we need in the system to avoid future confusions.
- This procedure can only be used for a Call Slip. It **CANNOT** be used for truck stock.

SECTION 2 (CONT)

1. The technician will select the Purchase Orders function on the main screen for their work order. See: Figure 1
2. The vendor must be chosen from the list. Great Care must be taken in choosing the correct vendor. See: Figure 2-3





3. Once the vendor has been chosen the part can be selected from the Material tab. Part numbers are specific and the correct number must be chosen. The cost must also be adjusted if different from the default amount. See: Figure 4
4. If the correct part number is not in inventory, than the Misc tab must be used. The Other Rate option must be changed to Miscellaneous and the Description changed

to the part number purchased. Again, the correct material cost must be entered.
See: Figure 5

5. Once all of the parts have been added to the Purchase Order, you choose Submit. The PO number is at the top of the screen. See: Figure 6
6. Once the PO is generated and part received, a picture of the receipt **MUST** be attached in the work order using the Document Management tab. Failure to do so may result in disciplinary action.

100% 12:36 PM

Add Purchase Order Material For WO: 521151 (SUPER... ⋮

ADD

Quantity	1
Equipment	Refrigeration ▼
Part Number	C032S
Description	FILTER-DRIER
Unit of Measure	EA
Unit Cost	9.818
Extd Cost	9.82

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We just need to think as a team how to put in place a check and balance so reconciliation does not become an issue, also we can surely capture all the cost in the

system so we do not miss the billing opportunity.

SECTION 3: PARTS OBTAINED BY A TECHNICIAN IN THE FIELD FOR TRUCK STOCK ONLY

1. The Technician shall pick-up needed parts/supplies at the assigned Supply House.
2. In the event the vendor does not send signed copies of the packing slip electronically, (using CAM Scanner or equivalent), it is the technician's responsibility to obtain a digital copy of the receipt and e-mail it to: **parts@wearetheone.com**

Receiving personnel will then match the packing slip to the purchase order, verifying:

- That the parts ordered were in fact, the parts-received- by line item
- The quantities match – by line item

SECTION 3 (CONT.)

- The pricing is correct
 - No additional parts included
 - No tool purchases on a job purchase order without W/O prior approval.
 - Any errors shall be immediately reported to the Purchasing Manager before leaving supply house.
 - If no errors, they can receive the parts against the work order and attach it to the purchase order.
 - If part that was ordered was ordered incorrectly contact your field supervisor with a picture.
1. Any adjustments that need to be made to the PO can only be made by Purchasing.
 2. It is the L/C's responsibility to follow up and close out the work order.
 - Also, under no circumstance should an invoice be created for a work order, until the POD is received and verified.

3. It is the responsibility of Service and L/C to ensure the packing list is e-mailed to Receiving, the same day, to properly control the overall process. Receiving cannot monitor the Technician, as they are not involved in the process of sending the Technician to a Supply House.
4. All packing slips received by 12 noon, will be entered in the system by 5PM that same day.

Any packing slips received after 12 noon will be entered into the system for the following work day.

1. If no e-mail verification is sent, there needs to be a discussion with the respective Technician and continuous disregard of this SOP could ultimately lead to disciplinary action taken. A formal write up will be submitted to the HR department and it could result in termination.

SECTION 4: TECHNICIAN RECEIVING PARTS FROM COMPANY DRIVER/ DIFFERENT TECHNICIAN

1. Dispatch will notify receiving (via e-mail only), of all work orders to be distributed on-site to Technicians.
2. Warehouse associate will print the work order list and pull the assigned parts and initial the work order.
 - Small parts will be put in a master carton and labeled “**contains X number of jobs**” with the Techs name on it
3. All boxes must have the Technician's name clearly marked on it and boxes taped together for easy transport and distribution.
4. The receiving Technician must verify that all work orders have been pulled, accurately filled, and complete. If it is all correct, the delivering party needs to sign the paperwork received. Errors or missing parts need to be corrected immediately and noted on the receipt. If no correction is noted, the delivery will be deemed complete.
5. Once parts are delivered, the receiving technician must then sign that they received all parts complete. Paperwork is to be returned to the warehouse and utilized as a POD by the delivering party.

Any errors or missing parts, must be called-in immediately. (NOT TEXTED OR EMAILED)

1. For control purposes, return the “parts transfer document” signed, with three sets of initials/ signatures... 1) person who pulled parts, 2) person who delivered parts and 3) Technician who received the parts.

SECTION 5: DRIVER PICKING UP AT SUPPLY HOUSE AND DELIVERING TO TECHNICIAN

1. Driver is dispatched to supply house by the Parts Manager, upon receipt the driver will contact the appropriate dispatcher and report the items that have been picked up. The Supply House must send over a copy of the POD (Proof of Delivery) in real time.
2. The L/C will receive the items in the PO (purchase order) for the specific job. In the event that the vendor does not send signed copies of the POD/packing list, electronically using CAM scanner or equivalent, the driver must obtain a digital copy of the receipt and send it to the dispatcher. The dispatcher will have the receipt attached to the purchase order.

SECTION 6: PARTS PUT IN SHED FOR TECHNICIAN OFF HOUR PICK UP

1. L/C will notify receiving (via e-mail only), of all work orders to be put in the shed.
2. The Warehouse Associate will print the work order list, pull the assigned parts, and initial the line items. Small parts will be put in a master carton and labeled **“contains X number of jobs”** with the Techs name on it.
3. All boxes must have the Technician's name clearly marked on it, and boxes taped together for easy transport and distribution.
4. No parts are to be put in the shed, unless they are checked, verified, and signed-off by the team member who pulled the part(s), and a member of the Management team or Management authorized personnel.
5. A copy of the work order list must be attached to the parts for verification purposes.

6. Technician is to notify Service Manager by Email, of any discrepancies or it will be assumed all parts have been received correctly. If said part will impact first call that day, a phone call should be made.

SECTION 7: PARTS ON BREAK

1. Parts returned to the warehouse that were ordered incorrectly or no longer needed, are to be put in the "On Break Status," by the L/C. A parts team member will determine the status of the parts, change it in the system accordingly and either return it to the supplier or to inventory.
2. If parts are dropped-off in the shed by Technicians, they must be with a tag, identifying the reason for its return and what work order it was attached to. No exceptions!