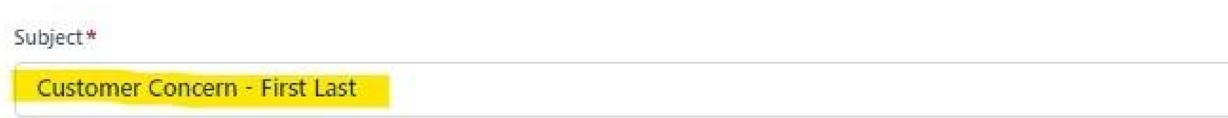

KTI Dispatch Guide (Updated 2023)

This guide is to serve as a tool to quickly find answers to general dispatching questions at Karls Technology.

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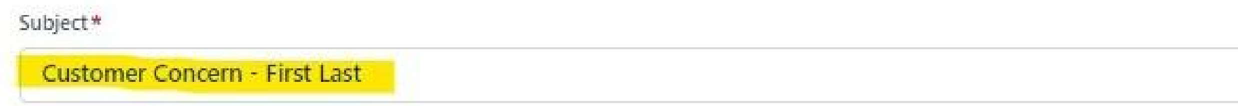

- How to Contact Clients in our Reschedules
- Optimizing Routes
    - Double Stacking
    - How to Optimize
- Moving Clients Forward To Fill Gaps
- Acceptable Payments
    - Cash? No
    - Check? No
    - **Card**? Yes
- Client Calling In to Pay Invoice
- Appointment Cancellations Appointment Cancellation Policy Agreement
    - Same Day Cancellation (SDC)
    - Same Day Reschedule
- 'New' versus 'Existing' Clients
    - Black-Listed Clients
- Four-Point Inspection
    - Data Backup
    - Smart Check: HDD
    - Anti-Virus Solution
    - Network Check
- Slack Channel(s)
- Devices We Do and Don't Work On
    - General Estimates for Repairs (1-2 hours of TOS, $125/hour)
- Remote Visits
    - What Can We Help with Remotely?
- N-Able
    - Someone calling in about N-able
- Carbonite/iDrive
- Tawk.To
- Data Recovery
    - Clean Room Recovery
- Zip Code Service Range / Phone Number Directory
    - Trip Fees
    - Phone Number Directory

- Google Reviews
- Handling Customer Complaints
    - Revisit / Refund Requests
    - Developing a Concern Ticket
- KT3 Dispatch Tools and How to Use Them
    - Copyables
- Someone asking for a Job
- Commonly Used Terms at KTI
- General Questions Carbonite, Employment Verification, Additional SDC, Bitlocker, Speak with owner, Licensed/Insured/Bonded
- KT3 Performance (KT3 slow, not loading)

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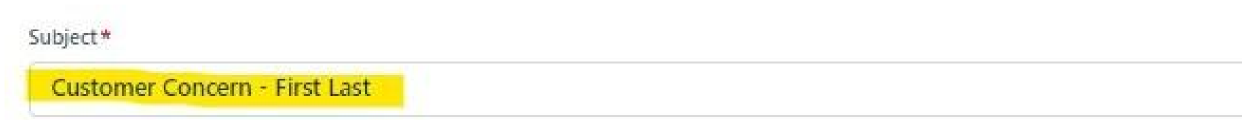

Dispatcher Role

- The role of a dispatcher is to respond to calls, emails, and appointment requests from clients and schedule appointments for Field Engineers. Any missed calls, texts, emails, etc all generate a ticket in Freshdesk that dispatchers are responsible for responding to as soon as possible.

- Dispatchers are the first line of communication between the Field Engineers and clients and are responsible for informing Field Engineers of any client inquiries.

- Overall, Dispatchers handle the phones and scheduling appointments for our Field Engineers.

Dispatch Expectations

- Dispatch is responsible for scheduling each Field Engineer at least 4 billable appointments per work day.

- Dispatchers are expected to answer incoming calls and live chats unless already on a call or finalizing a booking, email response, etc. Any missed calls generate a ticket in our Freshdesk queue that is to be responded to as soon as possible.

- Dispatchers are expected to schedule and develop/optimize routes that are less than 2 hours of total drive time per day for each Field Engineer

- Dispatchers are expected to submit 40 - 60 logs per work-day averaging 20% - 30% booking rate.

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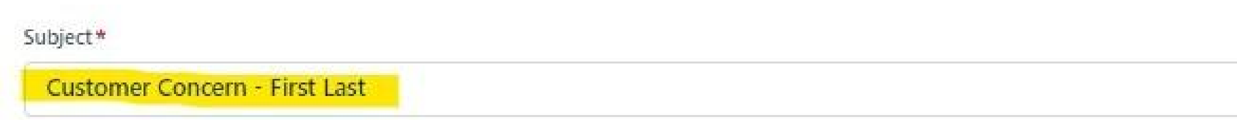

Call Handling

- Answering a Live Call

When answering a live call, they need to be answered with this introduction:

“Thank you <u>for calling for computer repair</u>. My name is _. How can I help you today?”

- -

- Returning a Phone Call

When calling back a client and they answer, we should begin the call with,

“Hi there. This is _ <u>with the computer repair service</u> you reached out to recently, returning your phone call to see how we can help.”

If you can tell when the client reached out to us via ticket time-stamp, you can be more specific about when they called. IE - ***“This is _ with the computer repair service you reached out to about 20 minutes ago, returning your phone call…”)***

- -

- Parking a Call

When a client’s needs to be transferred to another person - we can park the call.

Parking a call puts the client on hold and provides a 3-digit code that will answer the parked call if entered into RingCentral’s Dial-Pad. This 3 digit code is given to whoever is intended to speak with the client. When the 3 digit code is called, it will answer the parked call.

This situation often happens when a Field Engineer is unable to make contact with their remote client and requests Dispatch’s assistance making contact. Once the Dispatcher has the remote client on the phone, they’ll park the call for the Field Engineer to pick up.

- -

- RingCentral Texting

Most contact with our clients will take place on the phone and we should always be trying to get clients on the phone for the highest probability to book them.

However, there are situations where a text message may need to be sent, such as:

- Sending a text after leaving a voicemail when responding to a ticket
- A client requests a text confirmation about their scheduled appointment
- Client may be deaf or hard of hearing and request to speak through text
- Client states their email is not working to receive our automated confirmation

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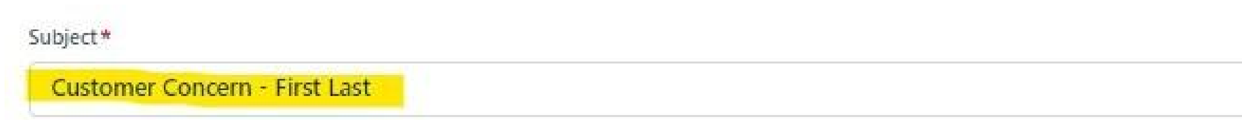


email

Most of your texts will be sent after already leaving a voicemail for a client to have a secondary option for the EU to respond to.

General SMS format:

"We tried to return your call for computer repair, but we were unable to reach you. Please call or text us back here to schedule your appointment. Thank you so much for reaching out to us!"

Appointment Confirmation (if requested by EU):

"This text is a confirmation of your scheduled computer repair appointment on [Date] between [arrival window]. The field engineer will contact you roughly 30 minutes prior to their arrival. If you need to cancel, please contact us by 8pm the night prior to the appointment to avoid a same-day cancellation fee. Have a great day!"

Any time we receive a text message, a Freshdesk ticket is generated for it. When replying to an SMS/Text message, **always find the ticket for it** that was generated and claim the ticket as well as make notes.

Include the text for the response SMS/Text you sent to the EU as a note in the Freshdesk ticket.

- -

- Leaving a Voicemail

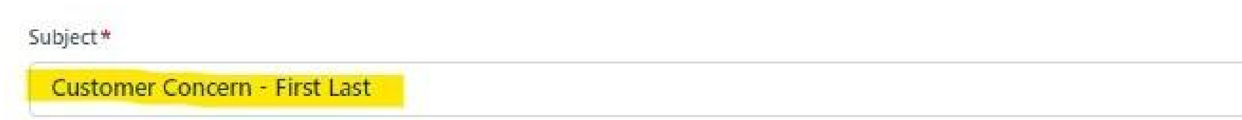
Leaving Voicemails is an inevitable part of our job as dispatchers. The voicemails we leave clients may differ slightly depending on the available information we have from the client, but they should generally flow very similarly to this:

Standard VM response to missed call ticket:

"Hi there. This is [Name] with the computer repair service you recently reached out to, returning your phone call to see if there were any computer difficulties we could assist you with. If so, please call us back here at [Metro Phone Number], again that's [Metro Phone Number]. We look forward to hearing from you! Have a great day!"

Standard Appointment Request Response where we know what website they submitted the Appointment Request at:

"Hi there. This is {Name} with Queen Creek Computer Repair Service. I received your appointment request regarding difficulties with [generalized summary of their submitted issue]. We'd be happy to help you with this. Please call us back at [Website Phone Number], again that's [Website Phone Number] to <u>finish scheduling your</u>



***appointment*. We look forward to hearing from you. Have a great day!"**

\- -

\- Informing a Field Engineer to call a client

Clients will often call in wanting to speak with the Field Engineer who assisted them on a previous appointment.

In these situations, we inform the client that we will pass along their info to the FE and that they will reach out as soon as they are available.

1. Collect necessary information from the EU as to why they're wanting to speak with the FE so we can provide them context (so they're not calling their clients blind).

    1. Ping the FE in main KTI channel with the following information:
        A. The client's name and contact number
        B. The reasoning for their calling in
        C. The most recent WO ticket link for that EU

Example: ***"Hi @FieldEngineer. Previous EU - John Doe 123-456-7890 - called in wanting to speak with you about continuing Email issues. Client says they're not receiving their emails after you left and would like to discuss that with you. Please reach out when you are available. Previous WO here: https://karlstechnology.freshdesk.com/a/tickets/#######."***

2. Once your message is posted in the KTI channel, we need to **create a reminder event** on the FE's schedule.

Click and drag a 2-hour window on the FE's schedule to create an event. Inside the Event title, enter ***"Call [Client's Name][Phone Number]"***. In the event description, include your slack conversation from the KTI channel.

Example:

In title: Call John Doe 123-456-7890

In Description: ***Previous EU - John Doe 123-456-7890 - called in wanting to speak with you about continuing Email issues. Client says they're not receiving their emails after you left and would like to discuss that with you. Please reach out when you are available.***
Previous WO here: https://karlstechnology.freshdesk.com/a/tickets/#######."

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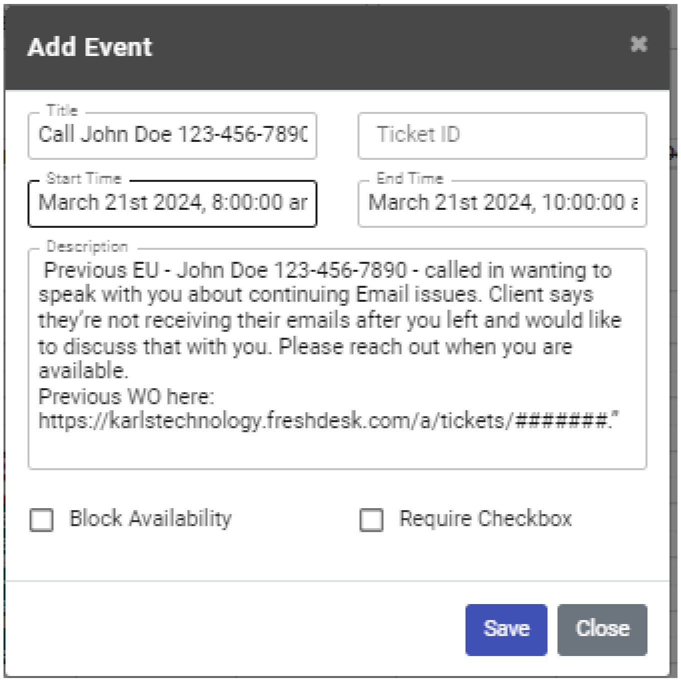

Do NOT check the 'Block Availability' box before saving the event - this will cause KT3 to think the FE has an additional WO on their schedule, which can cause problems with existing WOs. (You can simply un-select (then save again) if you accidentally blocked it)

3. Lastly, to ensure our Field Engineers are contacting their clients back accordingly, we will take a screenshot of the message (Snipping Tool) and/or a direct link to the Slack conversation sent to the Field Engineer about the client and paste it into the WO associated with the EU.

Example:

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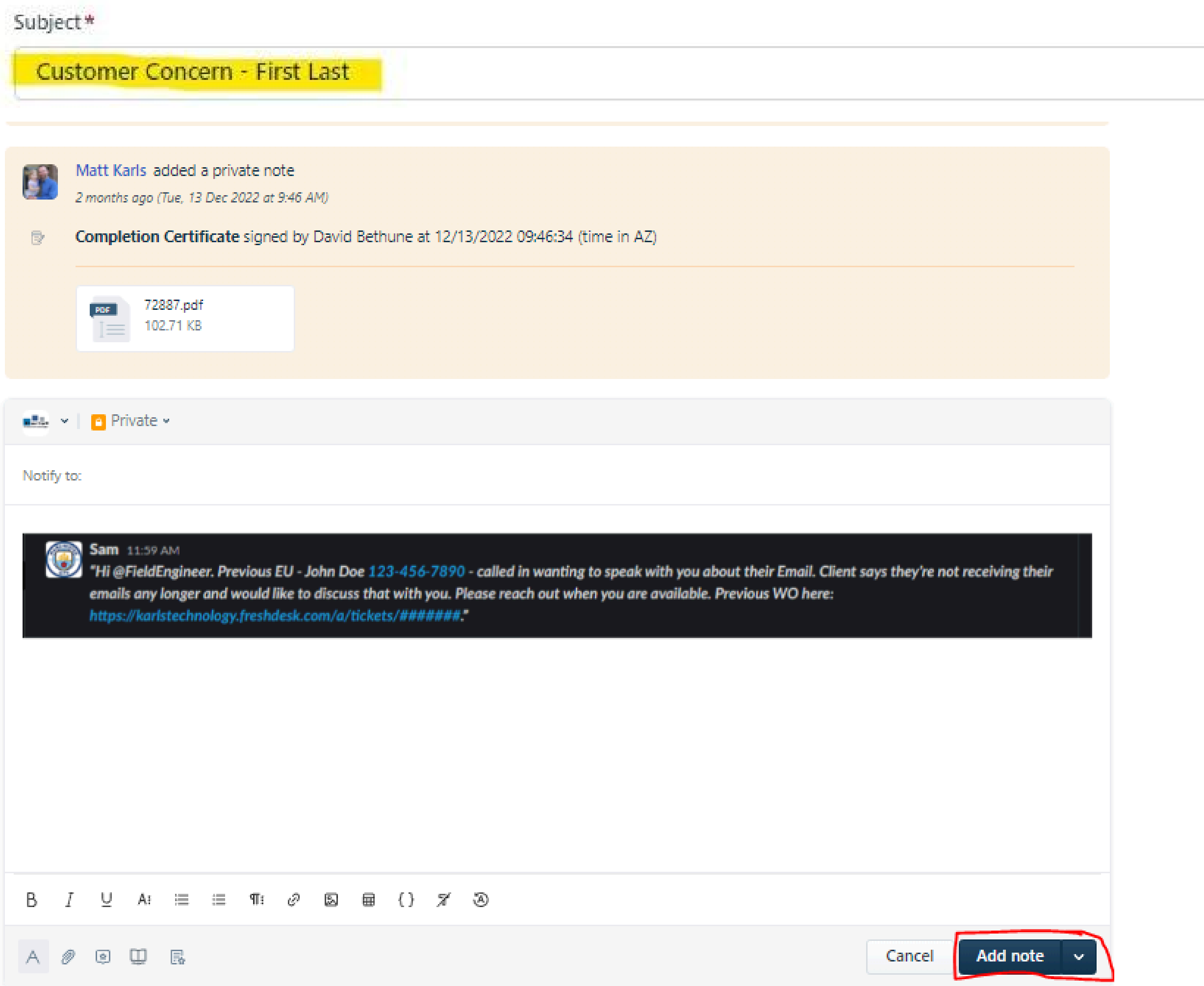

Once the copied image is pasted in the EU's WO notes, you have completed all the steps required to properly inform our FE to contact their previous client. From there, FE or Helpdesk will inform Dispatch on what to schedule for the EU, whether it be another billable service or Revisit.

- -

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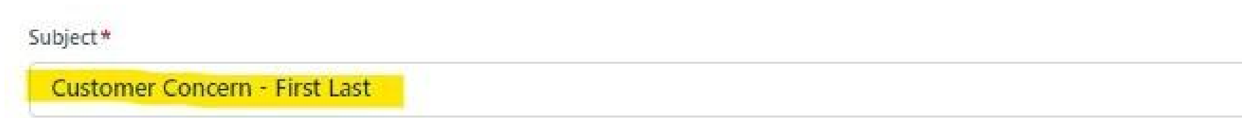


Reserving Appointment Windows:

Once a client has agreed to schedule an appointment with us, inside of the #appt-reservation channel, we will post:

1. The Appt Window
2. The Field Engineer
3. The Day/Date of the appt

Examples:

8-10 Chase.Barnes tomo
12-3 Riley.Vargas Friday

In the event that an appointment is being scheduled on a specific date over a week away, we can add the specific date to the reservation to avoid confusion.

Example:

12-3 Josh.Watkins, Fri 12/8

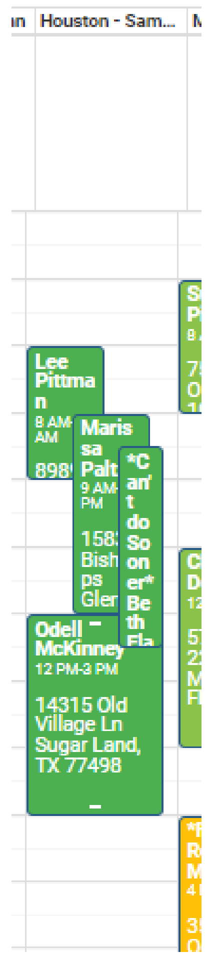
Double-stacking Reservation:

- There are times when we are double-stacking windows already scheduled with an appointment. In these cases, we want to provide context to our other dispatchers to reflect the double-stack. We do this by reserving the OPEN window on the FE's schedule, but noting that it's actually a double-stack.

In this example, the FE has two 9-12s double-stacked. The reservation would look as followed:

2-5 Sam.G tomo (double-stack 9-12, here 1st)

This informs your other dispatchers that you are reserving the only open window on the FE's day, but double-stacking on a different window.



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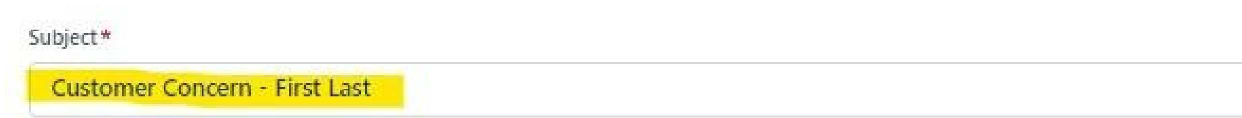

Cost of Service

- As a completely mobile computer repair service, **we charge an hourly rate of $125.00 per hour for the time the Engineer is on-site.** We charge the **minimum 1st hour** and prorate after that in 15-minute increments. This breaks down to **$31.25 every 15 minutes AFTER the 1st hour.** We also only accept credit/debit cards as a payment method (we are able to accept Mastercard/Visa/Discover/AMEX/Visa Gift Cards).

- We also charge a **$4 fuel-surcharge which goes directly to the Field Engineer** to help off-set rising gas prices.

- If an appointment has a **Trip-Fee** attached, there is an **additional** $45 charge on top of hourly rate and $4 fuel Surcharge. Most appointments will not have a trip fee.

How much for a 1-hour appointment that does not have a trip fee attached? - **$129.00**

EXAMPLE ON EXPLAINING PRICING TO CLIENTS:

"We charge $125 an hour for the engineer's time and prorate after the first hour; plus a $4 fuel surcharge to help the engineers' offset rising gas prices. Typical visits range between 1-2 hours and we only accept cards for payment. If any hardware replacements are needed to resolve the issue, the engineer will help source out those options for you and determine the best solutions for you moving forward."

If the EU asks for you to explain the hardware situation further - "*We don't carry replacement hardware, so the engineer would have to source out the compatible replacement part for your specific device and help you order that. Once we have an idea of when that replacement part will arrive, we would set up a 2nd visit to send the engineer back out to help with the installation.*"

Scheduling Appointments

- We have four different windows of arrival that we schedule appointments within for our Field Engineers. These windows of arrival are:

a. 8am - 10am
b. 9am - 12pm
c. 12pm -3pm
d. 2pm - 5pm

-Optional Windows of arrival: Optional windows are **typically utilized for Revisit** appointments (non-billable) or used to optimize routes. There are also some Field Engineers who run 5 billable appointments per day, which then have an appointment scheduled in the 4-7pm window.

e. 10:30am - 1:30pm
f. 4pm - 7pm

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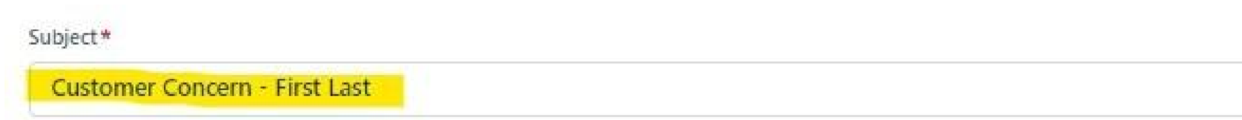

- If you are scheduling an appointment outside of normal arrival windows, a note must be included in the #appt-reservation channel as to the reasoning why. An example: **“1-3pm Watkins tomorrow. Client is in a work meeting until 1pm.”**

Items to keep in mind when scheduling appointments

1. Earliest availability in the schedule
2. The Field Engineer’s home location and current route on that day
3. Client’s address/location in relation to FE’s route/home

- Before confirming an available appointment time with a client, you are required to input the client’s provided ZIP or Address into the Field Engineer’s current route on that day to determine if it is a suitable appointment to schedule.

General Rule-of-Thumb to follow to ensure scheduling optimal routes for our Engineers:

- If the client’s location is LESS than 30 minutes from another appointment, you can offer the next immediately available window.

- If the client’s location is GREATER than 30 minutes from another appointment, we should offer the 2nd available gap and not schedule the appointments back to back.

- For example, John has an 8am-10am appointment very close to his home and a client that is interested in booking is 40 minutes away from John’s 1st appointment. We should offer this client the 12pm-3pm window of arrival since the appointment is GREATER than 30 minutes from John’s 8am-10am appt. This gives the Dispatch team the opportunity to find another appointment in the 9pm-12pm window along the way to that 12pm-3pm.

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Time Zone Differences

Karls Technology operates in Arizona time (Mountain Standard Time, MST)

Daylight Time Start Second Sunday in March

Standard Time Starts First Sunday in November

Phoenix is ALWAYS on Mountain Standard Time (MST)

Mountain Standard Time (MST)

Active MST Metros: Phoenix, Denver

Mountain Daylight Time (MDT) is 1 hour ahead of AZ. (AZ Time +1)

Active MDT Metros: Denver

Eastern Standard Time (EST) is 2 hours ahead of AZ. (AZ time + 2)

Active EST Metros: Atlanta, Tampa, Miami

8 AM in AZ = 10 AM in EST

Central Standard Time (CST) is 1 hour ahead of AZ. (AZ time + 1)

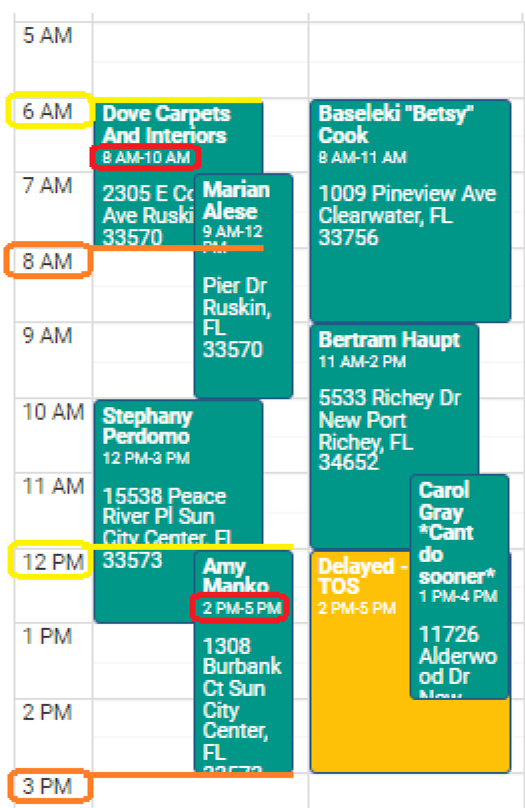
Active CST Metros: Dallas/Fort Worth, Houston

8 AM in AZ = 9 AM in CST

Pacific Standard Time (PST) is 1 hour behind AZ. (AZ time - 1)

Active PST Metros: Las Vegas

8 AM in AZ = 7 AM in PST

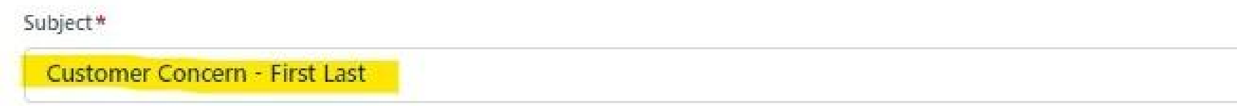


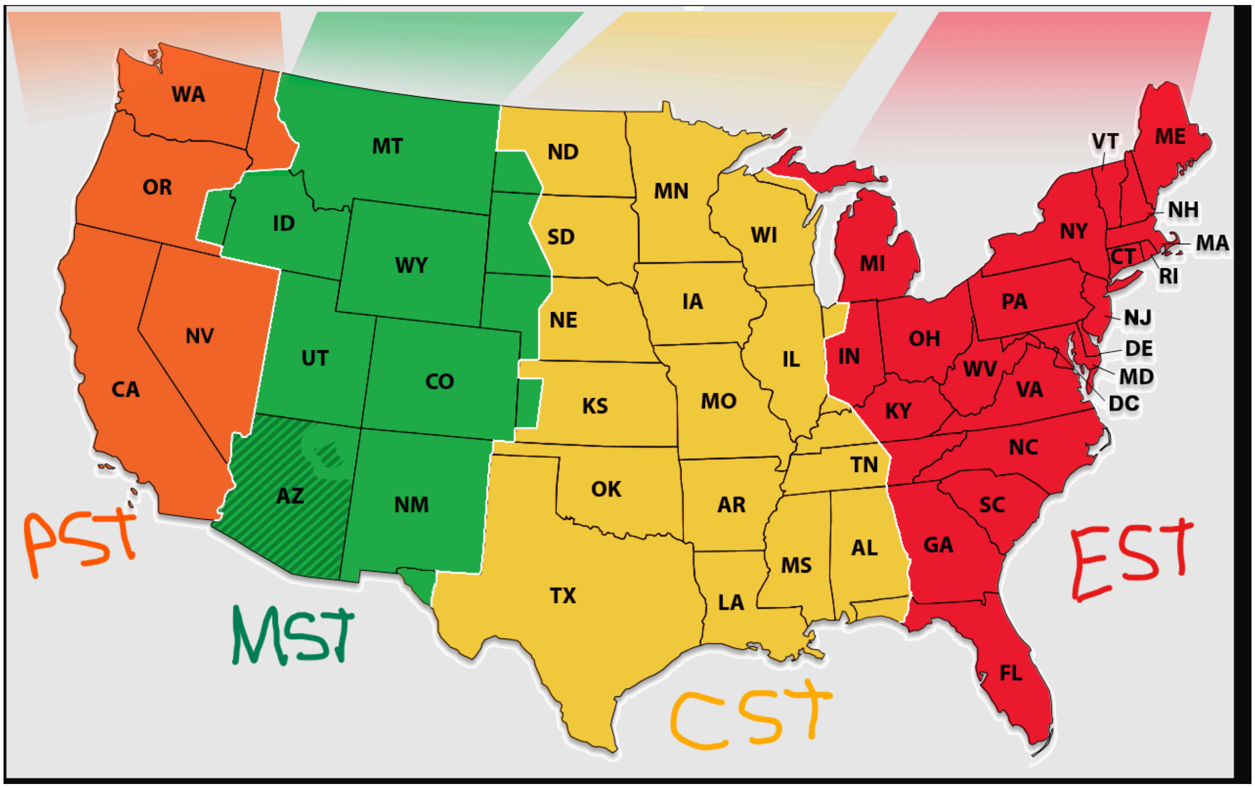
KT3 Calendar is viewed in AZ time. Here is an example of an EST FE's schedule:

In this example, we can see that the Field Engineer's first appointment, the 8-10 (red square), is within 6am-8am (yellow and orange squares) on the schedule.

Since KT3 Calendar is viewed in AZ time, an 8-10am appt for EST FE is slotted in the 6-8am time frame on the schedule. EST is 2 hours ahead of AZ time.

Same thing with the 2-5pm appointment with the EST FE. It shows as 2-5 for the FE (red square), but is slotted in the 12-3pm window (yellow and orange squares) on our Calendar view.





- -

We need to be extra aware of Time-zone changes when scheduling [Remote] visits.

Remote appointments are most often scheduled at the beginning or the end of a FE's day. Here is a list to quickly check the time-zone differences to determine what window the FE will be contacting the EU in their relative time-zone.

- -

MST FE (PHX/DENVER)

8-10 remote for a MST FE (PHX/DENVER) would be a 10am-12pm window for EST Client.
8-10 remote for a MST FE (PHX/DENVER) would be a 9-11am window for CST Client.
8-10 remote for a MST FE (PHX/DENVER) would be a 7-9am window for PST Client.

2-5 remote EOD for a MST FE (PHX/DENVER) would be a 4-7pm window for EST Client.
2-5 remote EOD for a MST FE (PHX/DENVER) would be a 3-6pm window for CST Client.
2-5 remote EOD for a MST FE (PHX/DENVER) would be a 1-4pm window for PST Client.

- -

EST FE (ATL, TAMPA, MIAMI)

8-10 remote for an EST FE (ATL, TAMPA, MIAMI) would be an 8-10am window for EST Client.
8-10 remote for an EST FE (ATL, TAMPA, MIAMI) would be a 7-9am window for CST Client.

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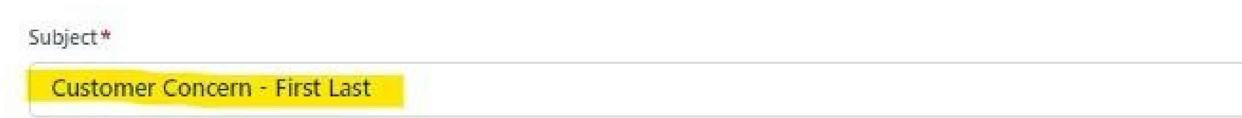

8-10 remote for an EST FE (ATL, TAMPA, MIAMI) would be a 6-8am window for MST Client.
8-10 remote for an EST FE (ATL, TAMPA, MIAMI) would be a 5-7am window for PST Client.

2-5 remote EOD for an EST FE (ATL, TAMPA, MIAMI) would be a 2-5pm window for EST Client.
2-5 remote EOD for an EST FE (ATL, TAMPA, MIAMI) would be a 1-4pm window for CST Client.
2-5 remote EOD for an EST FE (ATL, TAMPA, MIAMI) would be a 12-3pm window for MST Client.
2-5 remote EOD for an EST FE (ATL, TAMPA, MIAMI) would be a 11am-2pm window for PST Client.

CST FE (DFW/HOU)

8-10 remote for a CST FE (DFW/HOU) would be a 10am-12pm window for EST Client.
8-10 remote for a CST FE (DFW/HOU) would be a 8-10am window for CST Client.
8-10 remote for a CST FE (DFW/HOU) would be a 7-9am window for MST Client.
8-10 remote for a CST FE (DFW/HOU) would be a 6-8am window for PST Client.

2-5 remote EOD for a CST FE (DFW/HOU) would be a 3-6pm window for EST Client.
2-5 remote EOD for a CST FE (DFW/HOU) would be a 2-5pm window for CST Client.
2-5 remote EOD for a CST FE (DFW/HOU) would be a 1-4pm window for MST Client.
2-5 remote EOD for a CST FE (DFW/HOU) would be a 12-3pm window for PST Client.

PST FE (LV)

8-10 remote for a PST FE (LV) would be a 11am-1pm window for EST Client.
8-10 remote for a PST FE (LV) would be a 10am-12pm window for CST Client.
8-10 remote for a PST FE (LV) would be a 9-11am window for MST Client.

2-5 remote EOD for a PST FE (LV) would be a 5-8pm window for EST Client.
2-5 remote EOD for a PST FE (LV) would be a 4-7pm window for CST Client.
2-5 remote EOD for a PST FE (LV) would be a 3-6pm window for MST Client.

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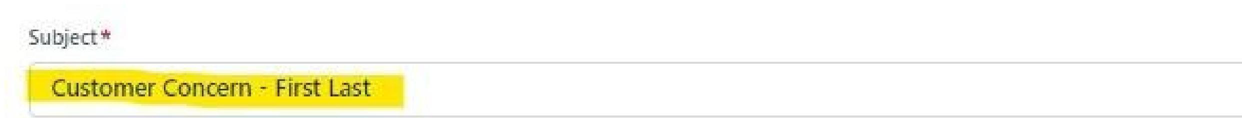

When Can We Call Clients?

We call every metro 7am-9pm UNLESS it's within 15 minutes of when they call or place an appointment request and then you can call them at ANYTIME of the day.

Example: If an EST client calls in at 10pm EST (7 or 8pm AZ time), we can still call the EU back even though it's past 9pm in their metro (as long as its within 15 minutes of their call)

- -

Follow-Up vs Revisit

A **Follow-Up** appointment is a **BILLABLE service visit**, meaning we will charge our hourly rate to send the Field Engineer back out to the client for continued service. Follow-Ups are generally for Hardware Installations or continuation of a prior visit.

A **Revisit** appointment is a **COMPLIMENTARY service visit** equal to the amount of time the Field Engineer was on-site during the prior visit.

- If the Field Engineer was on-site for 1 hour during the first visit, the first hour of the Revisit appointment is not charged. Any additional time the FE spends on-site during a Revisit is prorated at the normal hourly rate.
- **A Revisit appointment requires a FULL 4-Point inspection to be completed** during the prior service visit for clients to qualify for 2-week Revisit warranty.

Example of a FULL 4-Point Inspection: Client qualifies for Revisit

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Subject *

Customer Concern - First Last

Matt Karls added a private note

11 days ago (Fri, 27 Jan 2023 at 2:17 PM)

Data Backup Verification (1/4 of Mandatory Four Point Inspection)

Dustin.Brown made (or verified) a None backup as of None of the client's data onto None. The client's current backup system is noted as: None. Offsite / Cloud based backup status: No. Overall notes about their backup: So in regards to the backup there.is nothing to back up. This PC has nothing in it other than pdfs. I don't need to make a backup. Software is from win 7 and some won't even transfer to a new PC. Google Chrome is on sunc

https://www.karlstechnology.com/ktma/harddrive.php?ticket=1520606&user=Dustin.Brown&onsite=13:30:11

Matt Karls added a private note

11 days ago (Fri, 27 Jan 2023 at 2:22 PM)

Hard Drive Inspection (2/4 of Mandatory Four Point Inspection)

Dustin.Brown inspected the client's hard drive and found it's SMART status to be Good, with a POH of 1792 hours and a temperature of 30c. The hard drive had the following SMART IDs as having prefailure or failure values: None but extremely high spin up time. The hard drive had a fragmentation level of Na this drive is old and the (optional) HD Tune performance returned: Na this drive is old. Overall notes about their hard drive is noted as: So regard is a hard drive. It's a 5400 RPM Hitachi dry. It's running off SATA one so it shows the age of the system. I don't really have any recommendations other than just maybe get a new computer. At this point this won't be able to upgrade to Windows 11, so it's just better to nip it in the bud and take care of that way. I will recommend the laptop of the solid state drive in it for the client..

Matt Karls added a private note

11 days ago (Fri, 27 Jan 2023 at 2:25 PM)

Anti Virus Inspection (3/4 of Mandatory Four Point Inspection)

Dustin.Brown inspected the client's computer for infections and found Norton installed with the last scan date of Today. Dustin.Brown used Malwarebytes to scan 120000 files in 12 mins minutes to clean the computer while servicing it and made the following observations: So regardless of the antivirus inspection, the client has Norton but unfortunately it won't update anymore because the client's running Windows 7. So she is getting flagged for that. But it still seems to be scanning the best it can. I did use malwarebytes and scan. We found about 34 unwanted programs. They look to be mostly chrome extensions that have been lingering after i removed them..

Matt Karls added a private note

11 days ago (Fri, 27 Jan 2023 at 2:44 PM)

Network Inspection (4/4 of Mandatory Four Point Inspection)

Dustin.Brown inspected the client's Cox network (age of approximately Unknown years old) for issues and found Less than 5 wireless devices connected to the WiFi. The network connected to the internet with bandwidth of 18 down 5 up when Dustin.Brown arrived on site and Na after rebooting the router. Overall notes about the network and recommendations were: So regards to network. The client has a Cisco modem going to a Cisco router. The router does look a little dated. I might make a recommendation for a new one. I think I'll test out the speed once she gets her new computer and or I'll just test it out now with my laptop and maybe make that decision now. .

Example of a Waived 4-Point Inspection: Client does NOT qualify for Revisit

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Subject *

Customer Concern - First Last

Matt Karls added a private note

7 days ago (Tue, 31 Jan 2023 at 3:01 PM)

Data Backup Waiver signed by Barbara Koopman at 01/31/2023 15:01:45 (time in AZ)

80231.pdf
54.97 KB

Matt Karls added a private note

7 days ago (Tue, 31 Jan 2023 at 3:02 PM)

Hard Drive Inspection Waiver signed by Barbara Koopman at 01/31/2023 15:02:02 (time in AZ)

80232.pdf
55.22 KB

Matt Karls added a private note

7 days ago (Tue, 31 Jan 2023 at 3:02 PM)

Anti Virus Inspection Waiver signed by Barbara Koopman at 01/31/2023 15:02:22 (time in AZ)

80233.pdf
55.8 KB

Matt Karls added a private note

7 days ago (Tue, 31 Jan 2023 at 3:02 PM)

Network Inspection Waiver signed by Barbara Koopman at 01/31/2023 15:02:41 (time in AZ)

80234.pdf
55.27 KB

- If even 1 of the 4 points are waived, the client is waiving their right to a 2-week Revisit warranty period with us.

- -

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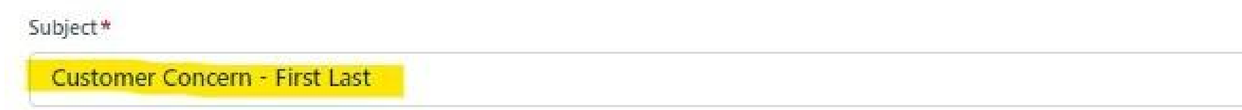
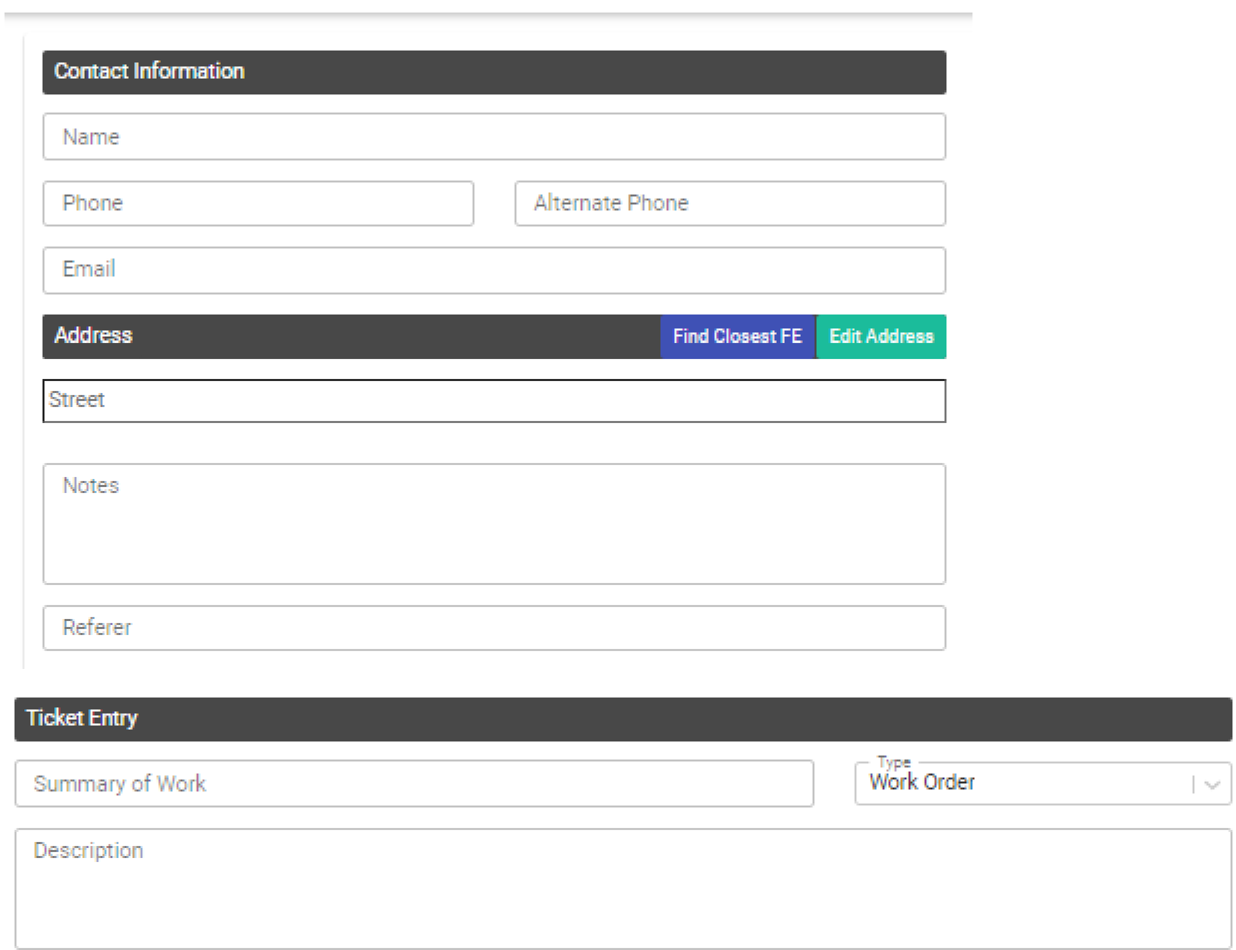


Collecting Client Information

Once a client agrees to schedule in an available window, we must collect the necessary information from the client for the booking.

KT3's Dispatch Page has the following sections required to be filled out for every Work Order:

Name: Client's First and Last name with proper punctuation
Phone: Best Contact Number to reach EU
Email: Email Address to send confirmation email
Street: Home or Business Address we're sending the FE to
Notes: Any additional notes required to access a client's location or that FE should be aware of: Gate Codes, Enter through garage, wear PPE, ETC.
Referrer: Where the client found/heard about us, typically Google.
Summary of Work: Quick summary of the issues the FE will be handling
Description: Details what issues the client is having and what they are wanting done during the visit.



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Subject*

Customer Concern - First Last

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3 key details to gather on every booking call for the Field Engineer

1. Windows or Apple? (EUs may not know which specific OS they are running, so simply knowing its a Windows or Apple device is sufficient in most situations)
2. Laptop, Desktop, Tablet? (Specify what device(s) the FE will be working on)
3. Estimated of Age of Device

Booking Call Check-List

During every booking call, we MUST inform clients of these items:

1. **Cost of Service**
   - We charge **$125 per hour** for the time the Engineer spends on-site.
   - Minimum charge of 1st hour ($125), **prorated after the first hour** in 15 minute increments. ($31.25 every 15 minutes after the 1st hour)
   - **$4 Fuel Surcharge** to offset gas prices for FEs
   - $45 Trip Fee **if applicable** (Trip Fees)

2. **4-Point Inspection**
   - FEs perform a **4-Point inspection** to ensure the health of our client's systems.
     - *If clients ask to know what that is, you can inform them that "our 4-Point inspection is an industry-standard health check for your system to verify the health of it and ensure that your information is not only secured, but backed-up entirely in the event of any system failure."*

   - Provides a **2-week warranty period** to any system issues related to the previous visit. Contact must be received within 2-weeks of the warranty period to qualify *(In situations where the client did attempt contact to us within 2-weeks and we simply missed the window by the time contact was returned, we can still set up the Revisit.)*
3. **Cancellation Policy**
   - Clients must notify us of any need to cancel or reschedule their appointment **by 8pm (in the EU's relative time-zone)** **the night prior to the appointment to avoid a same-day cancellation fee.**

   - The **SDC fee is waived** if a client reschedules their appointment to another day. **Once that rescheduled appointment is completed**, the square invoice is canceled out/waived.

Confirm Appointment Time

- Once all information is gathered to schedule the appointment, **confirm the appointment date and time with the client to ensure there is no confusion.**

Example - ***"I have all of the information I need on my end. I have your appointment scheduled on Friday, December 13th, with an arrival window between 12-3pm. Our field engineer will contact you roughly 30 minutes prior to their arrival to let you know they're on their way over."***

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Subject*

Customer Concern - First Last

- -

BOOKING CALL EXAMPLE: Use this as a reference (this call is about how 90% of my booking calls go with an average 30-40% booking rate)

[Answer incoming call]

"Thank you for calling for computer repair! My name is Sam. How can I help you today?"

- Hi Dan. I'm having trouble with my computer not turning on. It was working fine yesterday, but now when I tried pressing the 'on' button, nothing happens.

"We can certainly send an engineer out to help with your system's booting difficulties. What would be your zip code?

- 85225

"Great. Let me take a look at our availability while I discuss pricing."

- Okay

[Looking at schedule, plugging in zip to routes, finding earliest opening]

"Since we're a mobile computer repair service, we charge for the time that our engineer spends on-site with you at an hourly rate of $125.00/hour, prorated after the first hour. Typical service visits range anywhere between 1-2 hours, but it ultimately depends on what the Engineer determines once he has a chance to diagnose your system(s). There's also a $4 fuel surcharge to help offset gas costs for the engineer and we only accept credit card for payment."

[If client remains on the call]

"Give me just a quick moment to check our availability."

"At this time, Our earliest availability is Friday, the 21st, between 12-3pm as the arrival window. "

- So, it starts at 12 or they can arrive anywhere within that window?

"It is an arrival window, but the Field Engineer will contact you roughly 30 minutes prior to their arrival."

- Okay, I'll take it.

"Great. Let me reserve that spot for you - and I'll just need a little more information to solidify the appointment. Starting with your First and Last Name, please."

- John Doe.

"Thanks, John. Is this phone number the best to contact you?"

- Yeah, this is a good number.

"Good email address to send a confirmation of the appointment to?"

- johndoe123@gmail.com

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Subject*

Customer Concern - First Last

"Great. The address we'll be sending our Engineer to?"

- 1234 Alphabet Street, Google, 00000

"Any Unit numbers or Gate Codes?"

- No. Its a house.

“How did you hear about us? Was it a Yahoo search, Google, Bing”

- Bing

"Thanks, John. Regarding your computer experiencing the booting issues. Is this a Laptop or Desktop?"

- Laptop.

"Okay. Is it a Windows or Apple laptop?"

- Its not Apple. I hate them

"Okay. Do you know if it's running Windows 10?"

- I think so.

"Roughly how old is your computer?"

- A few years I think.

"Perfect. Besides the booting difficulties, is there anything else you'd like the engineer to take a look at while he's on-site? Any other devices you're having issues with?"

- No. Just the laptop. I use it for work.

[Closing the call - confirming appointment time, 4-Point inspection, and cancellation policy]

"Sounds good. Well, John, I have all of the information that I need on my end. Just to confirm your appointment time, real quick. I have your appointment set for Friday, the 21st, with an arrival window between 12-3pm.

Our Engineer will contact you roughly 30 minutes prior to their arrival to give you a heads up they're on the way over.

Once the Engineer has resolved your system's issues, we perform a 4-Point health inspection to make sure your system is looking healthy, and it also provides a 2-week warranty period with us. So if your system experiences issues related to the visit, we'll send our engineer back out for a complimentary visit, equal to the time they were on-site before.

Lastly, we do have a same-day cancellation policy. So, if something comes up and you need to reschedule or cancel your appointment, please make sure to do so by contacting us here by 8pm the night prior to the appointment to avoid a cancellation fee."

"You're all set. We're there any other questions I could help you with today?"

- No. Looking forward to Saturday. Thanks.

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"No problem. Have a good day.

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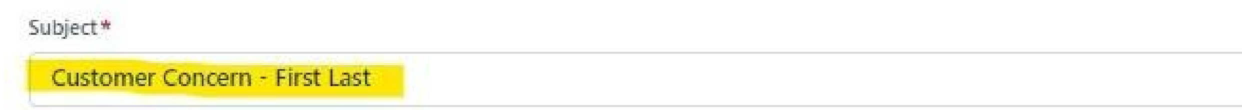

Logging Calls

Every time you make or take a call, there should be a log submitted.

We have 13 different call log scenarios available to use:

1. Booked/Existing
   - When you schedule an appointment with an existing client.

2. Booked/New
   - When you schedule an appointment with a new client

3. Client called for reschedule
   - When a client is called to reschedule their appointment for FE call-outs
   - When we leave a voicemail attempting to optimize an FE's route or reschedule due to a call out.
   - A client calls in to reschedule their appointment.
   - Any attempt to reschedule a client.

4. Client called in for cancellation.
   - When a client calls in to cancel their appointment
   - When a client texts or emails in to cancel their appointment, we still want to log the cancellation so that our backend numbers match

5. Client calling in for … (see notes)
   - Any call that doesn't fit in any of the other log scenarios

6. Client calling in for Revisit
   - When a client calls in with continuing issues after a service visit
   - When a Revisit appointment is scheduled

7. Left Voicemail
   - Any time we leave a client a voicemail.
   - It could be responding to a missed call, appointment request, etc.

8. No Book / Too Expensive
   - When a client mentions our pricing is too expensive for them so they look elsewhere.
   - *"I can't afford your hourly rate, I'm on a fixed income!"*

9. No Book / Too Far Out
   - When a client mentions our soonest availability is too far in the future for them and they need something sooner.
   - When a client is located in a metro where we currently do not have an active Field Engineer, so we cannot schedule an on-site visit (Need to make sure remote-option is offered)
   - *"I use this computer for work and I need it done by tomorrow."*

10. Price Shopping

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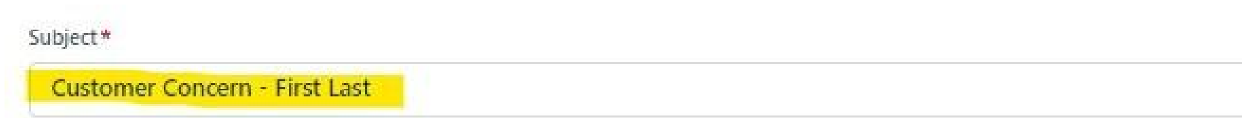

- When a client mentions they're calling around comparing pricing with competitors
-*"I'm not ready to schedule anything yet. I'd like to call around a bit first."*

11. Sent Text Message
- When we send a SMS response to a client

12. SPAM
- Robo-Callers
- Ghosts (No response on the other line when we answer a phone call)

13. Wrong Company (see notes)
- When a client meant to call a different company, usually the Geek Squad
- *"Oh, I thought this was the Geek Squad?"*
    - *TIP* In these cases, I like to let the client know, "If Geek Squad is not able to help you in a timely manner, please call us back as we are happy to help")

Oftentimes, Geek Squad will send a client's PC to a 3rd party for the repair and can take multiple weeks for the system to be repaired. So, clients who can't wait that long will still call us to help them, regardless if they have a 'contract' with the Geek Squad.

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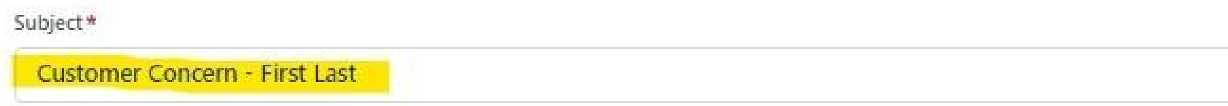

Subject*
Customer Concern - First Last

Too Far Out

- -

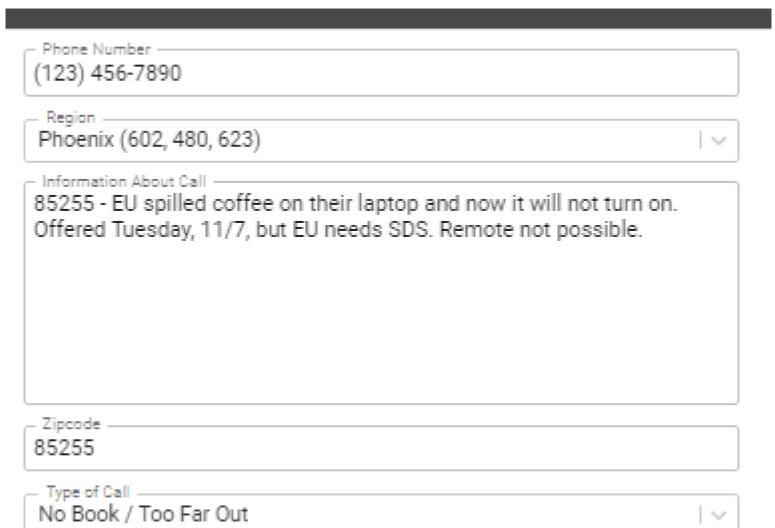
When we log a TFO, we want to provide context about the EUs current situation and whether they might be a suitable option to try and contact should a same-day gap show up in the schedule.

4 items to include when logging a TFO:

- **Zip Code** [Needs to also be included in the 'information about call' section]
- **Quick summary** about the client's computer issues
- The **date offered** that was too far out for EU and **date wanted**
- If **remote option** was offered or is applicable

Example: 85255 - **EU spilled coffee on their laptop and now it will not turn on**. **Offered Tuesday, 11/7**, but EU needs SDS. **Remote not possible**.

How your submitted log should look:


Phone Number
(123) 456-7890
Region
Phoenix (602, 480, 623)
Information About Call
85255 - EU spilled coffee on their laptop and now it will not turn on. Offered Tuesday, 11/7, but EU needs SDS. Remote not possible.
Zipcode
85255
Type of Call
No Book / Too Far Out

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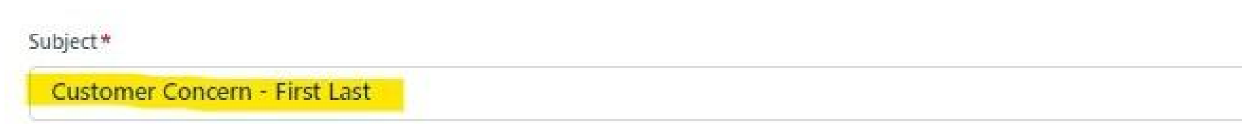

Ticket Handling

Key Points:

- Tickets are always given 3 contact attempts prior to closing them out.

- Tickets must be claimed prior to working on it. To avoid having multiple dispatchers attempting to contact the same client.

- Prior to closing any ticket, check if there are any mergeable tickets in the queue for the client that we can also close out
.

- NEVER MARK A TICKET AS SPAM. It breaks things in Freshdesk, so do not click the Spam button. EVER… please.

- Typically minimum 30 minutes between contact attempts unless an EU tries to reach us back before then.

Proper 3 touches on each ticket type:

Voice Mails and Missed Call (30 min between contact attempts)

1st touch - VM 1, set to Pending.
2nd touch - VM 2, follow-up with text, Set to Open then Back to Pending.
3rd touch - VM3, follow-up with 2nd text. Close it out.

Text Response (30 min between contact attempts)

1st touch - Call the EU from the text conversation. Leave VM and SMS response. Note as VM/SMS1 on ticket and set to pending.
2nd touch - Leave 2nd VM and additional text response. Set to Open then Back to Pending.
3rd touch - Leave 3rd VM and final text response. Close ticket.

Appointment Requests (30 min between contact attempts)

1st touch - VM1, send follow-up Email. Set to Pending
2nd touch - VM2, send follow-up Text. Set to Open then Back to Pending.
3rd touch - VM3, send 2nd follow-up Email. Set to Waiting on Third Party.

Email Response (3 hours between contact attempts)

1st touch - Email Response 1. Set to Pending
2nd touch - Email Response 2. Set to Waiting on Third Party.

- -

- Missed Call / Text

Missed Call

3 contact attempts:
1st contact attempt: VM1 > set to Pending
2nd contact attempt: VM2 > SMS > Set to Open then back to Pending

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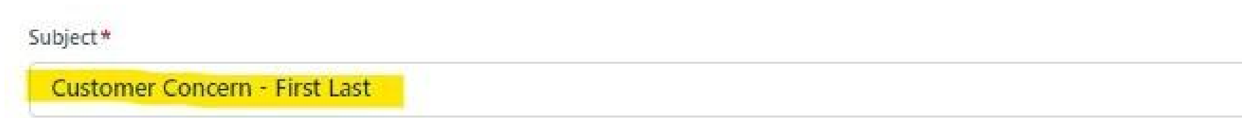
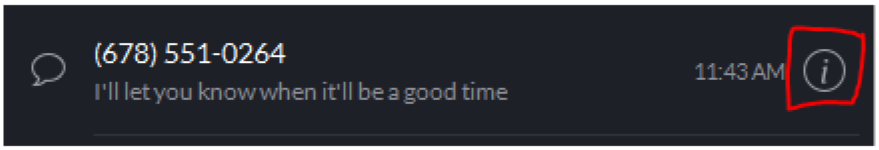
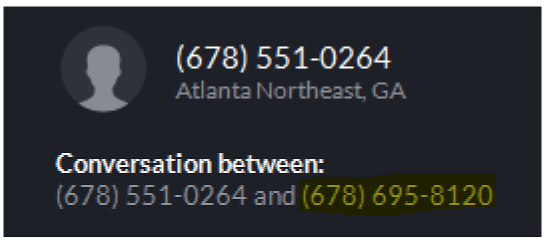


3rd contact attempt: VM3 > SMS 2 > Close out ticket.

Text Tickets

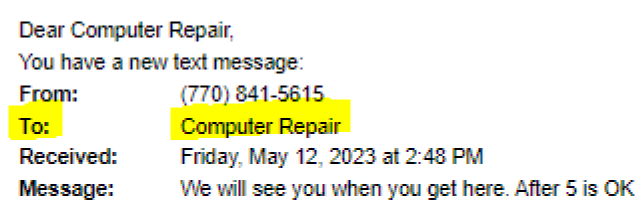
Freshdesk *'New Text Message'* tickets do not provide the information on what number they texted us at like missed call tickets do. You can determine what phone number the EU texted us at by clicking the circled ***i*** in RC's SMS conversation list..





We now know this client texted into our 678-695-8120 phone number, so we will use that number to call the client back with. We can also assume, but not always guaranteed, that this client is located in Atlanta.

Dispatch Queue also receives text messages that clients send to our Field Engineers. Texts sent to our Field Engineers can be identified by checking the **TO:** section of the ticket.

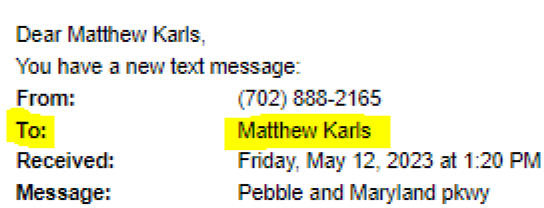


Dear Computer Repair,
You have a new text message:

From:	(770) 841-5615
To:	Computer Repair
Received:	Friday, May 12, 2023 at 2:48 PM
Message:	We will see you when you get here. After 5 is OK

If the ticket says the text is to **'Computer Repair**', that means the text message was sent to one of our **FE's RingCentral phone numbers**.

If the ticket says the text is to **'Matthew Karls**'. That means the text message was sent to one of our **Dispatch phone numbers**.



Dear Matthew Karls,
You have a new text message:

From:	(702) 888-2165
To:	Matthew Karls
Received:	Friday, May 12, 2023 at 1:20 PM
Message:	Pebble and Maryland pkwy

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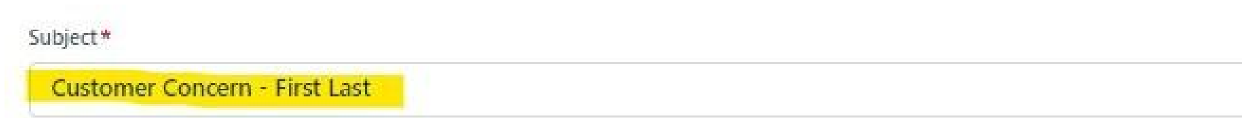

When we receive a text message that is intended for an FE, we need to look up the phone number that texted the FE, find the client's info and which FE they are currently scheduled with, then send a message to the FE in the KTI channel that their client is messaging them.
Example: @Fieldengineer Your client - Jane Doe 123-456-7890 - is texting you

- -

- Email Response

- Responding to Emails should be a fairly quick process. We have the Copyables page in KT3 with pre-written response(s) that can quickly be copied and pasted into our responses.

- Generic Email response to emails (to get phone number):

"Thank you for reaching out to us about your computer issues. We would be happy to assist you in getting your issues repaired. Is there a phone number and good time we could contact you to discuss getting everything resolved?"

- **If the EU's email provides some specific issue**s about their computer's troubles, we'd like to **personalize the email** to better inform the client we understand what they're having trouble with.
Example: if a client emails in that their computer's screen isn't displaying anything:

*"Thank you for reaching out to us about your **computer screen's display issues.** We would be happy to assist you in getting your issues repaired. Is there a phone number and good time we could contact you to discuss getting everything resolved?"*

- If a client is requesting a price quote over email:
*"Thank you for reaching out to us about your computer issues. We would be happy to assist you in getting your issues repaired. **Unfortunately, it is difficult to determine an accurate price quote without gathering additional details about your system's difficulties.** Is there a phone number and good time we could contact you to discuss getting everything resolved?"*

- -

- Appointment Request

When a client submits an appointment request online, it shows up as a ticket in our queue for us to call back asap. They are the highest booking conversion tickets, so it is expected that these are handled right away.

Appointment Requests provide us a ton of information right away, including the client's:
Name, Phone number, Email address, Zip Code, and the Computer Issues they're experiencing.

In this example, we see **Jerry Hogan** submitted an appointment request to **Scottsdale Computer Repair Service** because **their system 'Crashed'** and they live in **85268**.

We already have a ton of the information we need to book an appointment, which makes booking these tickets very simple.

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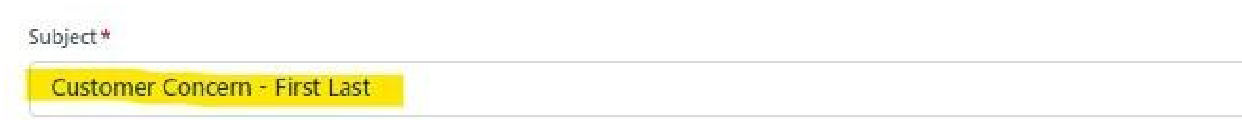

Step-by-Step on how to handle Appointment Requests:

1. Claim the ticket by adding a private note which says: Calling - [Dispatcher Name]
2. Refresh the page to ensure you are the only Dispatcher who claimed the ticket. If another dispatcher's 'claim' shows up prior to yours, delete your note and move on to the next ticket.
3. Determine which website the EU used to submit the appointment request by locating the URL at the top of the request. Example image included:

3b. In this example, Scottsdale Computer Repair Service was the website the client submitted their appointment request through, so **we want to call back the client using the phone number on the website**, which is 480-240-2960.You can click the link in the appt request to open up the website to find the phone number.Clients are most likely to answer a phone call from a number they just recently viewed.

4. If the client answers, you should open the call like so:

Using the same example from before, ***"Hi Jerry. This is _ from Scottsdale Computer Repair Service. I received your appointment request here regarding your computer system crashing?"***

From there, the call should be just like any booking call. Once the client is scheduled, add a private note to the appointment request that the EU was booked and close out the ticket.

4b. If the client does NOT answer, we should leave a voicemail like so:

"Hi Jerry. This is Sam with Scottsdale Computer Repair Service. I received your appointment request here regarding your computer system crashing and wanted to finish setting up the appointment to help you with that. Please call us back here at 480-240-2960 to finish scheduling your appointment. Have a great day!"

4c. After you leave a voicemail, we immediately follow-up with an email since the EU provided their email address. Using the Copyables response for Appointment Requests, we can quickly respond to them.

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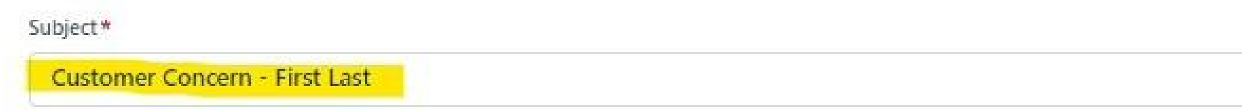
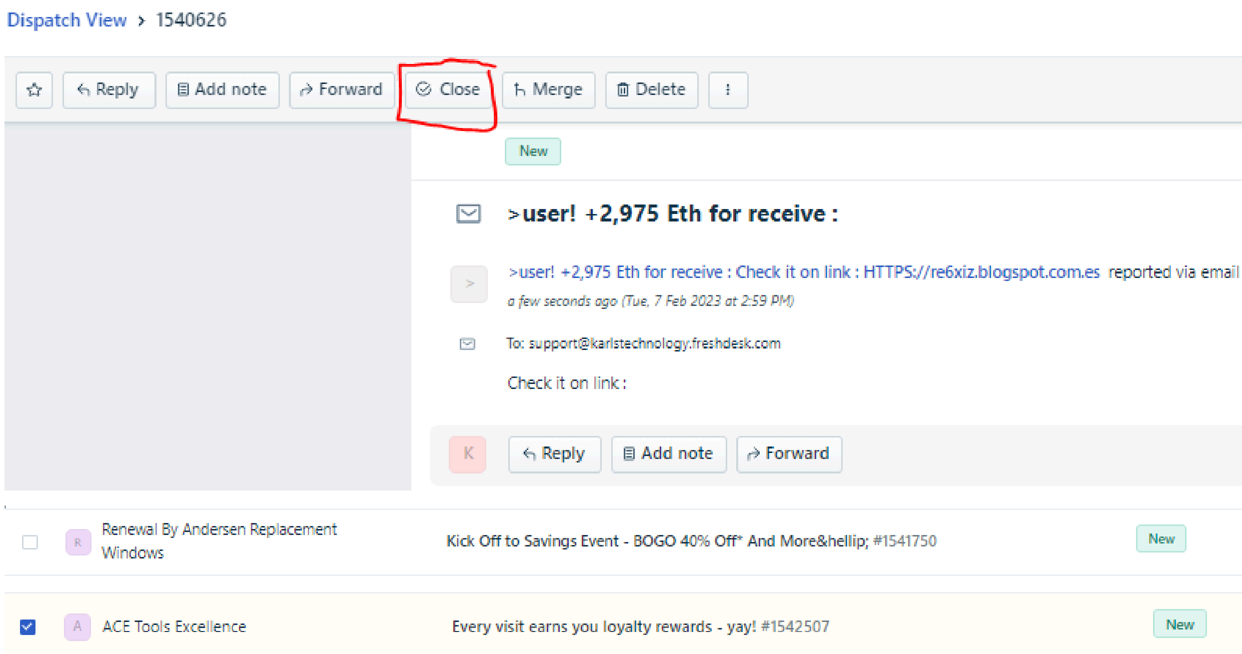


- **Spam Tickets**

- We **NEVER** mark a ticket as Spam. It breaks the back-end Freshdesk filtering, so anytime a Spam ticket enters the queue, we simply close it out.

Example(s) of a Spam ticket:



If you're uncertain about whether a ticket is Spam or not, **just LEAVE it**. One of the dispatch managers will review to close out the spam ticket.

- **Executable Scenarios**

Executable Scenarios (ES) are events in Freshdesk that quickly handle a task.

ES range from claiming a ticket to sending a ticket to another Queue if a separate department needs to review the ticket.

To access the Executable Scenarios, when viewing a ticket, click the 3 dots to open a drop-down menu, followed by selecting 'Execute Scenarios'.

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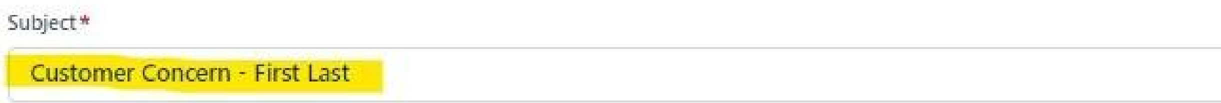
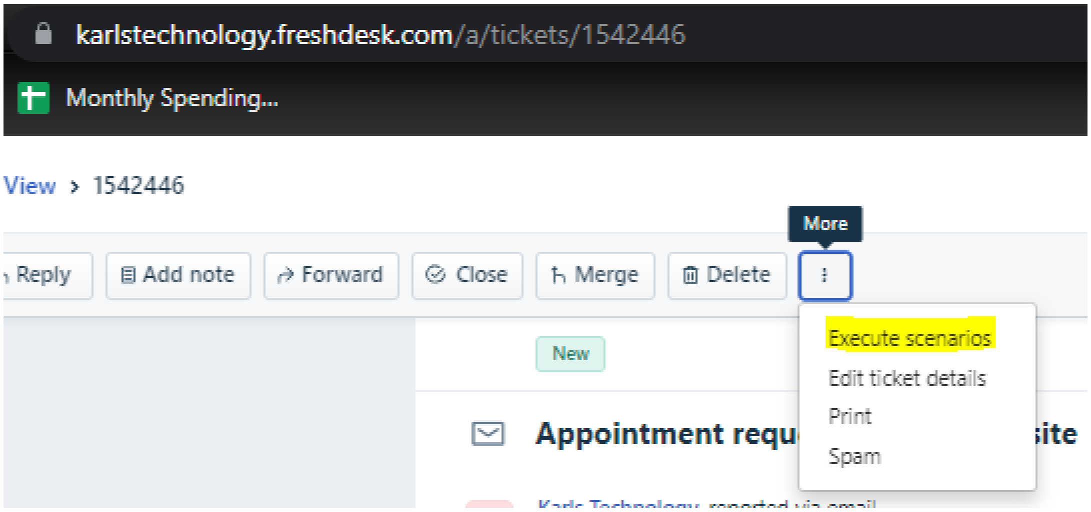
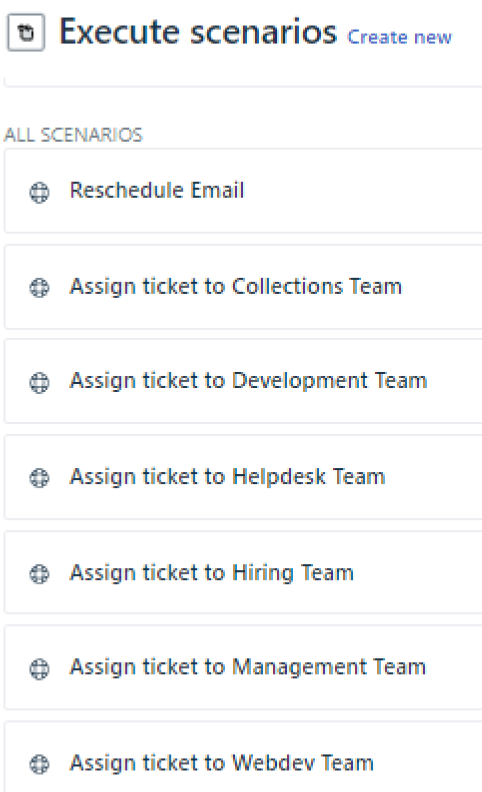




The different Scenarios we have available:

- Assign ticket to: Collections Team, Helpdesk Team, WebDev Team, Hiring Team, Management Team
- Responding - [Dispatcher Name] to quickly add a private note to claim tickets. **(If you would like an executable scenario added, DM @Sam.C and I will add one for you)**



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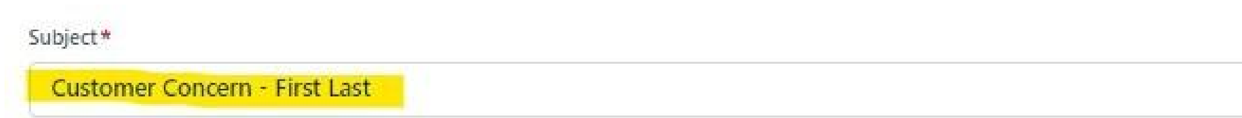
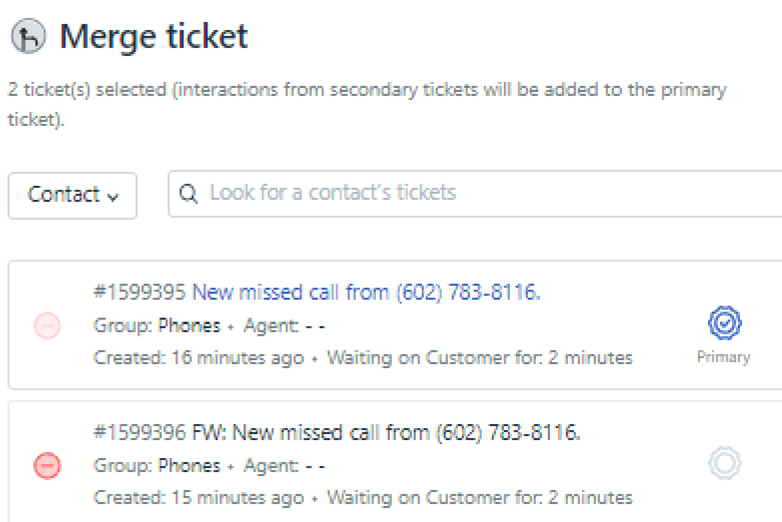


Merging Tickets:

Generally, ticket merges will happen automatically with Freshdesk's API integration. However, there are times when multiple tickets will need to be merged together.
In the example, we can see there are two separate tickets with the phone number: (602) 783-8116

We will merge these tickets by checking the box on the left hand side of the ticket to select them and then click on the 'Merge' button at the top of Freshdesk

From there, a sidebar will popup for confirmation on the merge.



The blue check on the right hand side indicates which ticket is going to be the Primary ticket that the other is merged into. Generally, the most recent ticket from the EU should be the primary.

Once you have confirmed both of the tickets are the same number/client - click the Blue 'Continue' button, then 'Merge' at the bottom of the sidebar.

You have successfully merged two tickets together.

- -

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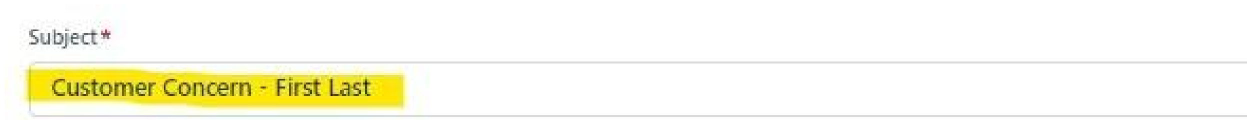

Miscellaneous Ticket Types:

- Alert: Pro AV (Full Monitoring):

These tickets stem from clients that use our N-able Antivirus software. This ticket is a report/alert from the client's system that something needs to be checked out. This issue could be HDD failure, Storage Capacity issues, Disk Usage problems, etc.

Example ticket: https://karlstechnology.freshdesk.com/a/tickets/1599509

In the example ticket, we can see the client's name is **Michael Feeder:** *Device: Michael Feeder | Surface | Home*

We can see the 'metric that triggered the notification' being a 'disk usage' trigger.

So, we would want to find the client's contact information via their name, reach out to the client and inform them that we received a notice that their system's disk usage is reaching near maximum capacity and that they should have one of our Engineers out to take a look.

VM example: "Hello Mr. Feeder. This is Sam with Karls Technology Computer Repair Service. We received a notice about your system through our N-Able antivirus software that your system is reaching near maximum disk usage capacity, which is now being reported as a 'Warning' state. We wanted to inform you of this before any further complications arise with your computer. If you would like to setup an appointment to have an engineer out to help resolve this and make sure your system is running optimally, please call us back here at _."

—---

- Undelivered Invoices

Example ticket: https://karlstechnology.freshdesk.com/a/tickets/1631950

Reach out and contact the EU and attempt to confirm the EU's email address. If you are able to correct the email, reachout to @collections or @manager so they can update the email in square and resend the invoice.

"Hi there. We noticed the email address we have for your profile, [insert email]@google.com, might not be correct and we wanted to get that updated for you!"

(avoid telling the EUs that we need their corrected email address to send them the invoice)

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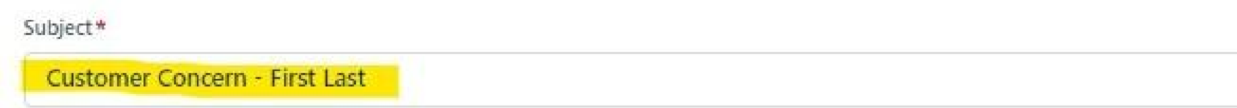

If the client hangs up on you or refuses to provide the correct email, make a note of that in the ticket before sending it to Helpdesk queue for review.

Note Example: *Client was contacted but refused to provide updated email. Sending to Helpdesk queue. - Sam.C*

—---

- FE Check Deposits

Example ticket: https://karlstechnology.freshdesk.com/a/tickets/1629908

Send these tickets to Helpdesk Queue for them to review.

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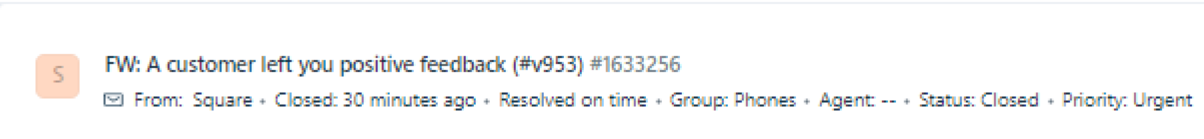
- Square Replies/Feedback

Example ticket for Negative Feedback: https://karlstechnology.freshdesk.com/a/tickets/1629988



Positive Feedback: you can choose to share that in KTI channel for the FE or simply close it out.

Negative Feedback: forward the ticket to Helpdesk queue for their review, so they can have a chance to discuss with the FE and potentially resolve any similar situations in the future.

—---

- Emails about Paying Outstanding Invoices

Send the ticket to the Collections queue for review.

- -

Rescheduling Clients

- Due to FE callouts

When FEs call out, Dispatch must contact that FE's clients and inform them that we need to reschedule.

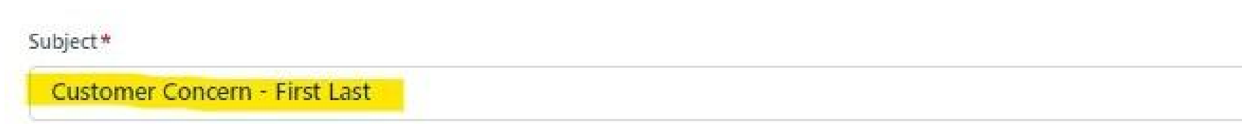
Calls to clients should be relatively simple and can sound very similar to this, ***"We are sorry for the inconvenience, but your Field Service Engineer will not be able to make it out into the field today, so we are trying to reschedule your appointment to the next soonest availability."***

If the client agrees to reschedule, find the soonest opening and start offering those spots until you find one that works for the EU.

If the client does not agree to reschedule and decides to cancel the appointment, we make a note of that to mark the number of cancellations on the FE's day for calling out.

Example Voicemail:

"*Hi there, this is [Name] with the computer repair service scheduled for an appointment today. We are*



sorry for the inconvenience, but your Field Service Engineer will not be able to make it out into the field today, so we are trying to reschedule your appointment to the next soonest availability. Please call us back here at [Local Metro Number] to reschedule your appointment. Have a good day.”

After a voicemail is left, we follow up with a text using the Copyables: *SMS for FE call out (after leaving VM saying the same message)*:

“We are sorry for the inconvenience, your Field Service Engineer will not be able to make it out into the field today, so we are trying to reschedule your appointment to the next earliest availability. Please call or text us back at this number to reschedule your appointment.”

- EU requesting reschedule

If the clients appointment is not on the same-day they’re calling in to reschedule, move the currently scheduled appointment to the agreed upon reschedule date.

- EU is on Reschedule List

When clients are placed on the reschedule list, we will call these clients to try and get them back on the schedule asap to fill gaps.

If you are designated to contact clients in our list of reschedules, this is how to approach the call.

Example Voicemail:

“Hi there, this is [Name] with Karls Technology Computer Repair Service. We have your appointment in our list of Reschedules regarding [brief description of the noted PC issues client is having]. We are looking to reschedule your appointment to our next soonest opening. Please call us here at [local metro number] so that we may reschedule your appointment. Have a great day!”

Follow up the VM with a Text which can be similar to the voicemail you left.
A note for each reschedule attempt needs to be left in the calendar description.
Appointments will receive 3 touches before being moved to cancellations.
Any touches resulting in a cancellation should be logged at “Called for Cancellation”
Any cancellations should be posted to #comms

- EU was an SDC

If a client is calling in to reschedule their appointment that was previously an SDC:

- Leave the original SDC appointment on the FE’s calendar
- Develop a new WO for the client.
- Use the same information that was in the previous WO (including any additional items if EU requests), then schedule the appointment at the agreed upon date/time
- Once the new appt is on the schedule, mark the title with *Notes*[Client Name], then include a quick note in the ticket description about the outstanding SDC.

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Client has SDC fee from [SDC date], please cancel out once service is completed. - [Name][time/date]

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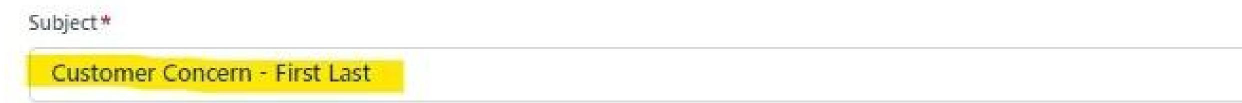

Example: ***Client has SDC fee from 2/20. Please cancel out once service is completed.* - Sam.C at 3:00pm MST 2/20**

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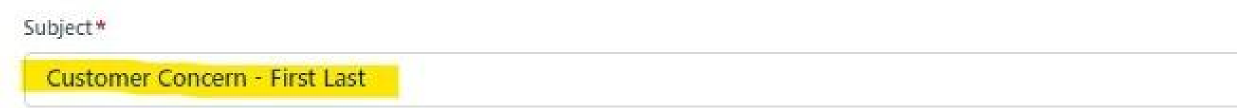


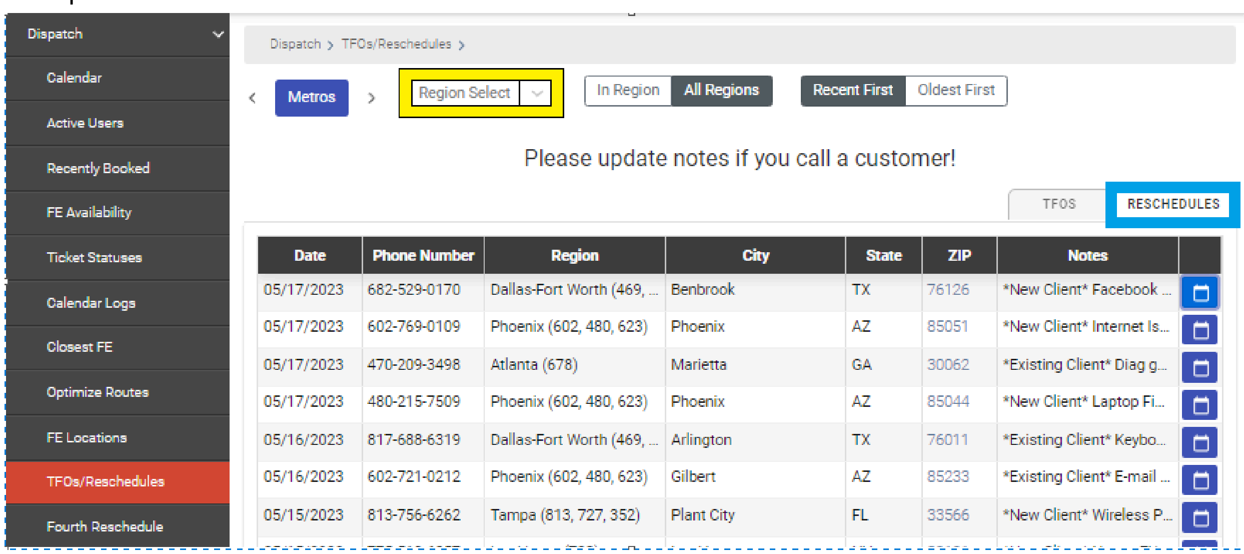
How to Contact Clients in our Reschedules

When designated to handle contacting clients in our list of Reschedules, navigate to the Dispatcher tab in KT3 and click the drop-down, then click **TFOs/Reschedules**.
https://app.karlstechnology.com/dispatch/tfos

Once there, on the right hand side of the page, click on the Reschedules tab to open up the list of Reschedules we have on our calendar.

You will notice that at the top of the page, there is a '**Region Select**' dropdown that will filter the Reschedules per metro you are focused on.

On the right hand side, clicking the blue Calendar button  will open up a new KT3 with that specific WO opened.



Filter the Reschedules page to your metro(s) that you are designated and work from the top-down. After each contact attempt, you will add a note in the ticket description noting the contact attempt. Similarly to tickets, Clients are given three contact attempts before their Reschedule appointment is moved to cancellations.

Example of how you should note your contact attempt:

***3rd Contact attempt to Reschedule, VM/SMS. Moving to Cancellations* - Dispatcher [date]**
***2nd Contact attempt to Reschedule, VM/SMS* - Dispatcher [date]**
***1st Contact attempt to Reschedule, VM/SMS* - Dispatcher [date]**

We should only contact a client in Reschedules **once per day**. So, if you see a note that the client has already been contacted today, move on to the next EU on the list.

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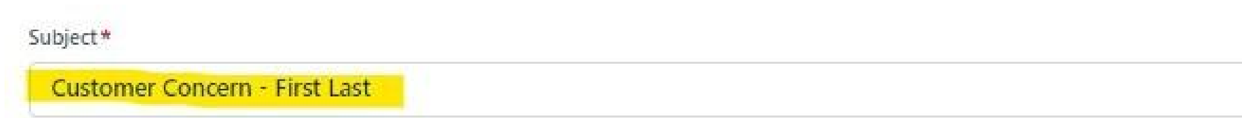

Example of how to open on these calls:

"Hello [EU]. This is [Dispatcher Name] with Karls Technology Computer Repair Service. I'm reaching out to reschedule your appointment to assist with your [brief summary of EU's system issues]. Are you available to reschedule your appointment at this time?"

If a client indicates they do not wish to reschedule but would prefer to cancel the appointment entirely, or if this is the third reschedule attempt check the 'Cancelled' button and then 'Update Ticket'

Log the call as a **Cancellation,** post the cancellation in comms, then move on to the next client.

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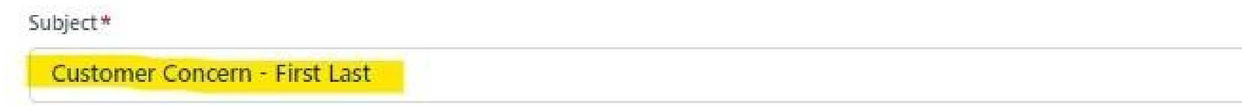


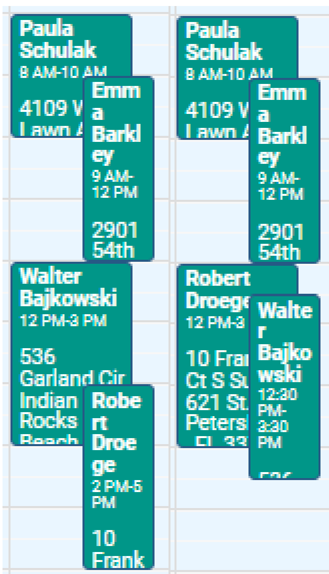
Optimizing Routes

Why do we optimize routes?

We optimize routes for our Field Engineers because we want to reduce the total time they have to drive between appointments. The goal is to keep all Field Engineers' drive times below 2 hours.

Double Stacking appointments

A Field Engineer's schedule can oftentimes be optimized by moving a single appointment on their schedule into a different 3 hour window of arrival. Since our windows of arrival are 3 hours (except for 8-10s), we only need a single client to agree to shift their appointment time, as opposed to relying on two clients to agree on swapping their appointment windows. **We do not stack 8-10s, only 3-hour windows.**



Here is an example of double-stacking appointments:

The first image shows one of our Field Engineers with a full schedule. However, when we open up the FE's route on the day, we can see that in its current order the FE would be required to zig-zag his driving between his 9-12, 12-3, and 2-5.

Check out the route here: [Not optimized] 👎

This non-optimized route is 2 hours and 17 minutes of drive time (with Tolls unselected) for the Engineer.

However, we can also see that the 9-12 (2nd) and 2-5 (EOD) appointments are very close to one another, so we need to find a way to have the FE hit both of those appointments back to back to avoid zig-zagging. So, we contact the 2-5 appointment (Robert Droege) to see if he is potentially available earlier in the day, either 9-12 or 12-3. Whether EU moves up to 9-12 or 12-3, either 3 hour window can be double-stacked and have the FE hit the appointments in optimal order.

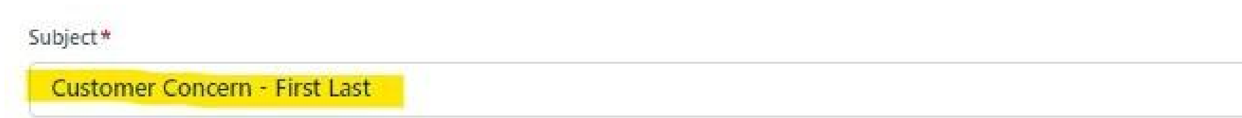
In this case, Robert Droege was contacted and agreed to move up to 12-3pm and was double-stacked with Walter Bajkowski. Now, we can see that this Field Engineer has two 12-3 appointments on their schedule. The appointment we want the Engineer to hit last has been shifted down by a half-hour to reflect which appointments the Engineer should go to first. This FE's route has now been optimized.

Check out the optimized route here: [Optimized].👍

The optimized route is 1 hour and 41 minutes of drive time (with Tolls unselected) for the Engineer. We dropped ~ 36 minutes of drive time by moving a single client.

Won't double-stacking appointments cause the FE to be late to the second of the stacked appointments?

- Not necessarily. Field Engineers' aim to hit at least 1.5-2 hours of TOS per service visit. This



doesn't happen nearly enough, but for the sake of this example, let's say our FE gets that TOS on all 4 of their appointments, but they have two double-stacked 9-12s and a 12-3 as their EOD. The FE should arrive at their first appointment right around 8am, then arrive at their first 9-12 around 10am, then to their second 9-12 closer to the end of the window, around noon. Of course, delays do happen, and it's up to the FE at that point to inform their clients of any delays. (If an FE is unable to contact their client, then dispatch can step in to attempt contact to inform).

Can I double-stack an appointment window that is already filled if it makes sense on the route?

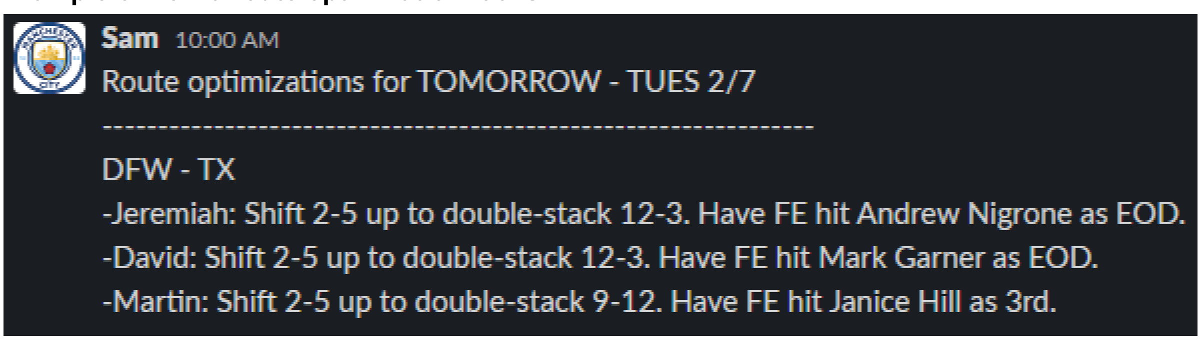
- **You are encouraged to schedule an appointment and double-stack an already filled window if it makes sense for the route**. It makes more sense to try and double-stack for a more optimal route than to fill a nonoptimal gap on the schedule. Plus, it is likely we'll end up having to call the client anyways to attempt to shift them around. Currently, KT3's FE Availability tool does NOT have a method to show available double-stacks, so you have to insert the clients zip/address to their routes to confirm. (This should already be being done anyways).

How do we optimize routes?

- Each day, sometimes multiple times per day, one of the dispatch managers will review the following day's schedule to determine any swaps that can be made to optimize any FE's route. These swaps are then posted to the #route-optimization channel and individual dispatchers will be designated to handle the optimizations, typically on a per metro basis.

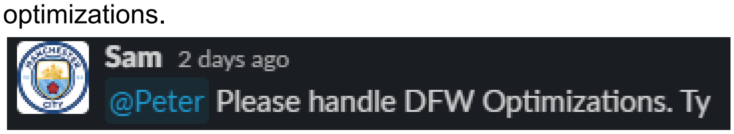
- Typically, optimizations are only attempted if the swap will reduce total drive time greater than 10 minutes. If a route optimization is only going to reduce drive time by 5 minutes, we would prefer to keep a client in their originally scheduled window to prevent potential conflicts if we ask them to change.

Example of how a route optimization looks:



This example shows Dispatch Team Lead, Sam, discussing what optimizations need to be attempted for each Field Engineer in the Dallas/Fort Worth metro.

Once the optimizations are posted, individual dispatchers will be designated to handle a metro's optimizations.



When you are designated to handle optimizations, inside the same message where you are designated, create a thread and copy-paste the optimizations in the thread and make notes on whether a client

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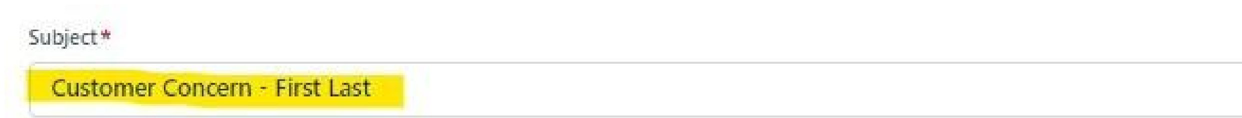
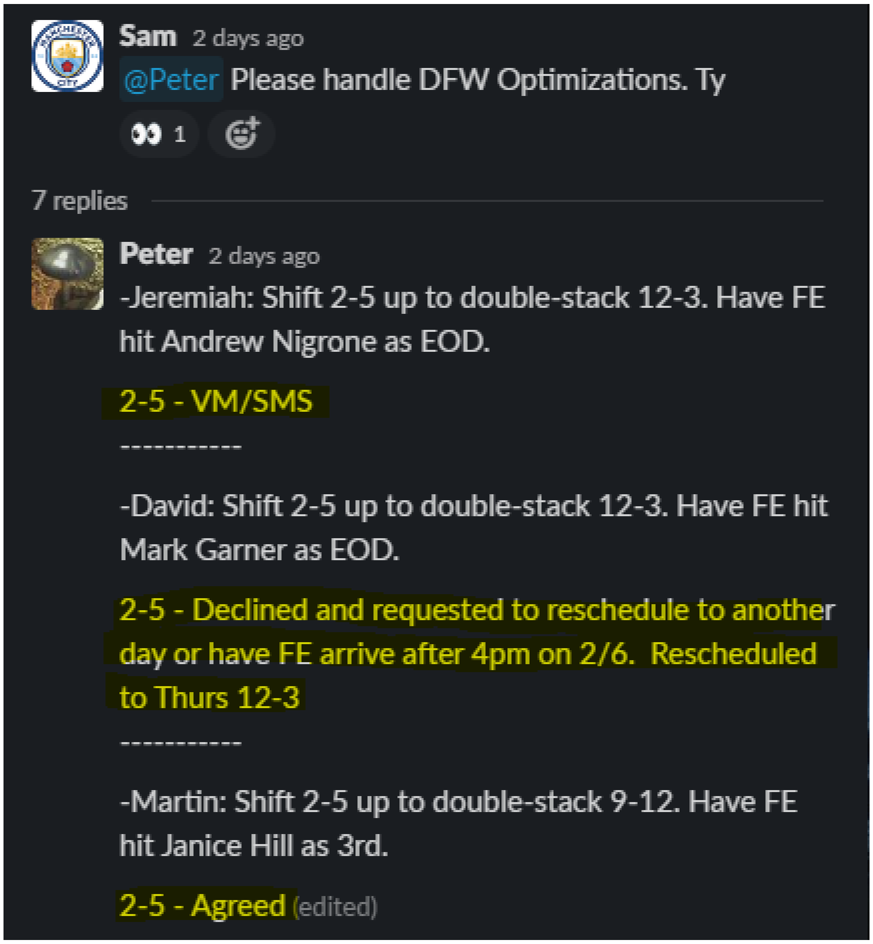


agreed or did not agree to the move.

Example image here with Peter's proper notation and updates from clients:



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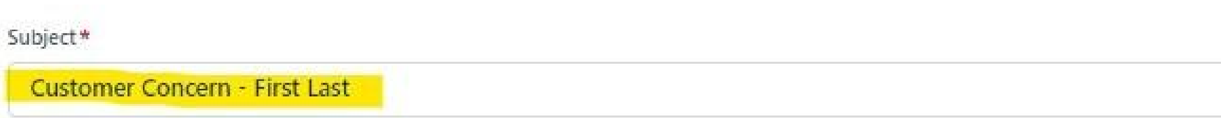


Moving Clients Forward To Fill Gaps

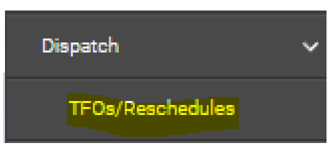
There are times when a Field Engineer(s) does not have 4 billable appointments scheduled. Field Engineers are required to run 4 billable service visits a day unless approved otherwise by Helpdesk or Management.

These gaps can occur from numerous reasons such as: Same-Day Cancellations, Client rescheduling their appointments the night prior, FE needing an additional appointment due to low TOS on their other appointments, etc.

Dispatchers should recognize a gap in a Field Engineers schedule and look to fill it as soon as possible.

Oftentimes, Management will designate an individual dispatcher to find a fill for an engineer. These are the steps the dispatcher should take to most efficiently find a fill.

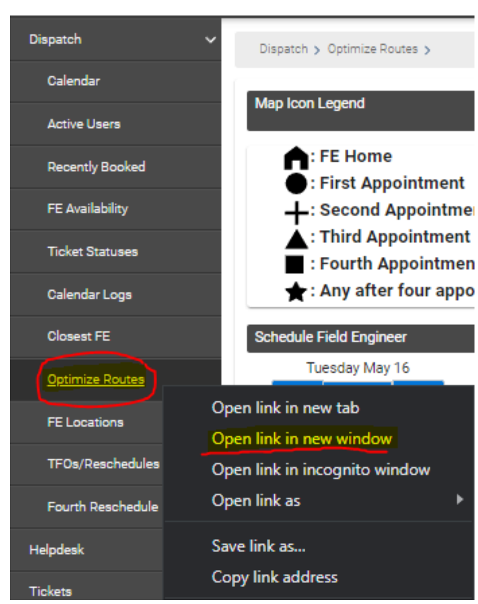
1. **Check the TFOs/Reschedules page in KT3** under the Dispatch Drop-down and look for any TFOs from the last day or two in the Metro to contact. A Zip Code should be included in the TFO, so **check to make sure it fits in the FE's current route on the day before reaching out.**



2. If there are **no more TFOs available for contact, check the Reschedules** available in the area and reach out to them. Reschedules are located on Sundays between 7-8pm window. Again, **check to make sure it fits in the FE's current route on the day before reaching out.**

3. If TFOs and Reschedules do not work out, look forward on the schedule for the latest scheduled appointment (Safe bet is to check atleast 1 week ahead from current date) and start contacting the clients that fit best moving backwards towards today. We want to try and avoid moving a client forward from the next day if possible because we create another gap that needs to be filled. Obviously, filling a same-day gap is more important than a next-day gap.

The process we should take to move a client forward:
A. Open up the FE's current route that you're trying to fill in Google Maps.
B. Open the 'Optimize Route' page in a new window. (right click and open a new window or 'Cntrl + Left click' on Windows)
C. Filter the 'Optimize Route' page to the metro you're trying to find a fill in.
D. Scan through the currently scheduled appointments to locate some close by the FE's current route.
E. Once you've found a suitable appointment, double-check its not a follow-up before reaching out and trying to move them



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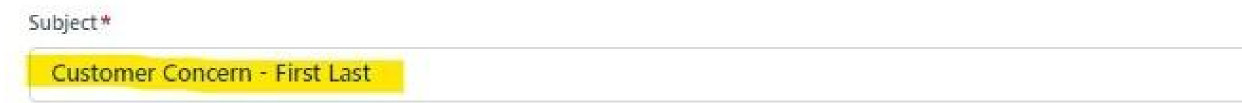

up.
F. Rinse/Repeat until you’ve exhausted future optimal options.

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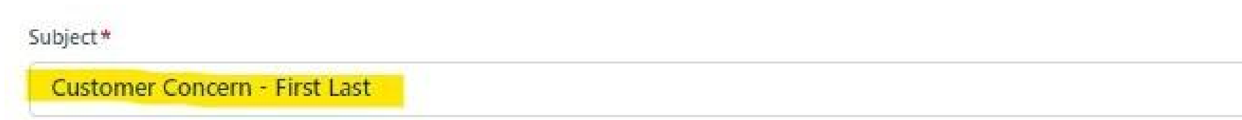


Acceptable Forms of Payment

We accept CREDIT/DEBIT CARDS and GIFT CARDS issued by Mastercard/Visa/Amex/Etc for payment. We do NOT accept Cash or Checks.

- Clients are expected to pay the Field Engineer at the conclusion of each service visit for their TOS. However, some clients are unable to pay when expected, so they are then sent an invoice for the TOS + a $62.50 invoice fee

- If a client calls in within 24 hours of receiving an invoice for service, we can drop the $62.50 invoice fee prior to collecting the payment.

EU trying to send us a check for payment?

-We do **NOT** accept Checks for payment. The client will have to pay their invoice online with a credit, debit card or gift card..

Client Calling in to Pay an Invoice

- When a client calls in to pay an outstanding invoice, **we must forward that call to our Payments team or a Manager for them to collect the payment so they can automatically update their backend documentation** which tracks these invoices.

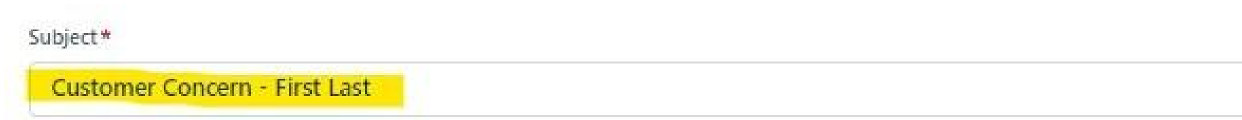
- **The proper way to inform the Payments team about a client's call in**:

1. Collect **client name**, **phone number, email address** and **invoice #** if the client has it available
2. Verify the client's email address that they received the invoice at and confirm it matches in our system. If not, update it.
3. In Dispatchers channel, **ping @collections** and **@managers** with the above information
4. Inform the client that the financials team has been informed and they will reach out to collect payment as soon as possible.

Example: @collections @managers John Doe, (johndoe123@gmail.com, 123-456-7890) called in to pay invoice #123456. Client was informed one of you will reach out when available.

- Client calling in to pay N-able invoice? Refer to the N-able section.

Important We want to **avoid telling clients that we've sent their info to our collections team** as **it may cause confusion and lead the EU to believe their invoice was sent to collections**. We simply want to **let them know we've passed on the information to the correct team** and that it will be handled accordingly.



Appointment Cancellations

Once an appointment is booked, the client is automatically emailed a copy of our cancellation policy in detail.

Appointment Cancellation Policy Agreement:

Karls Technology is committed to providing all of our clients with exceptional care. When a client cancels without giving enough notice, they prevent another client from being serviced. When you scheduled your appointment understand that you are holding a reservation time for service. Please notify us before the end of the business day prior to your scheduled appointment to notify us of any changes or cancellations. If prior notification is not given, you will be charged an hour of billable service for the missed appointment reservation.

When a client requests to cancel their appointment with us, we must first ask the client if they are requesting to reschedule instead of fully canceling their appointment. Typically, clients will take the opportunity to be moved to reschedules to avoid having to go through the booking process again when their schedule opens up. Moving an appointment to reschedules also allows KT3 software to automatically send the client *reminder* emails that they have an appointment they need to reschedule.

Same-Day Cancellations

Per our Appointment Cancellation Policy Agreement **"If prior notification is not given**, **you will be charged an hour of billable service for the missed appointment reservation**."

When a new client same-day cancels or reschedules their appointment, they receive an invoice equal to 1 hour of TOS ($125) + $4 Fuel Surcharge + $62.50 invoice fee, totalling $191.50.

Same-Day Cancellation Fees are **ONLY** sent to **NEW** clients.

We do **NOT** send SDC fees to **EXISTING** clients.

Same-day bookings ALSO receive an SDC fee if the client calls back in to cancel.

We need to be sure we properly inform clients that do schedule a same-day appointment about our cancellation policy. This is an example of how I like to inform client:

"Typically, we require 24 hours notice of any need to cancel or reschedule to avoid a cancellation fee. Since this is a same-day booking, you are waiving that option and if you

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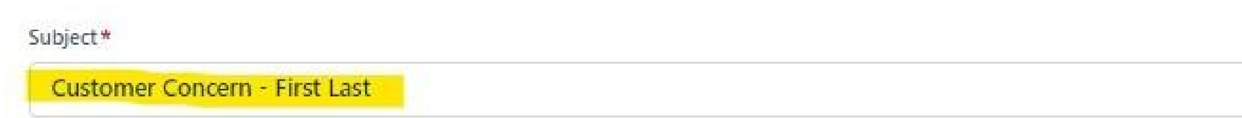


cancel the appointment, there would be a fee associated with that. However, if you do need to cancel the appointment, as long as you reschedule the appointment, any cancellation fee is waived."

***Important* - Dispatchers who handle the call** where a client is canceling or rescheduling a same-day appointment **MUST immediately look for a replacement appointment as well as notify the #Dispatchers channel about the opening on the FE's schedule, and the FE in the #kti channel**. This will allow the entirety of the dispatch team to be aware of the gap and potentially fill it with an EU they spoke with earlier.

- -

Same-day Reschedule

- Clients may call in on the same-day of their appointment to reschedule to another date.

- In these situations, **the client STILL receives a SDC fee**, but it will be waived upon completion of the rescheduled appointment.

- **How to handle same-day reschedule situations**:

1. Mark today's appointment as an SDC and leave it on the FE's schedule so they know to send the fee. Ping the FE in the KTI channel to inform them to send a fee.

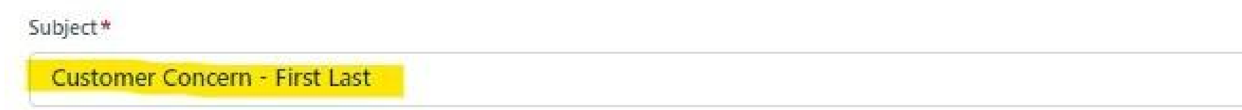
2. Using all of the same information, develop a new WO for the EU and schedule it at the agreed upon reschedule date

3. Once the rescheduled appointment is on the calendar, add *Notes* before the client's name in the title and then add a reminder about the SDC in the ticket description, **EU has SDC fee from [date]. Cancel out once service is completed.**

If the clients is interested in rescheduling, but they do not yet know when they'll be available:

- Follow the same steps of recreating the WO, but simply move it to Reschedules List by checking the 'Needs Rescheduled' box so that it automatically sends EU reminders to reschedule their appt.

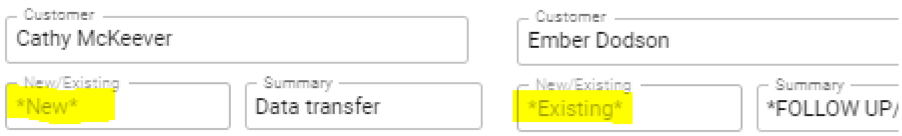
You have now completed a same-day reschedule.



New versus Existing Client

A client is considered EXISTING once we have received payment for a service visit from them. This also includes the client having paid in full, any fee incurred due to a Same Day Cancellation.

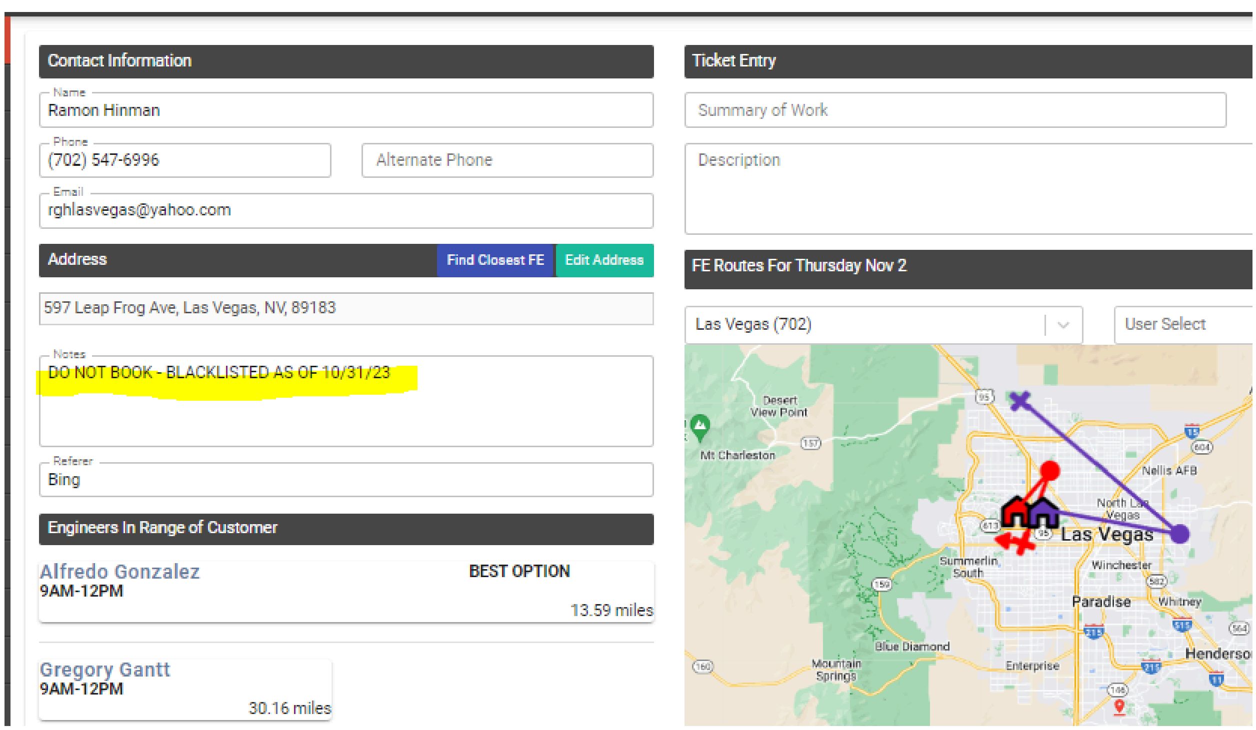
Client's are also labeled Existing or New on a Field Engineer's schedule:



Black-Listed Clients

A 'Black Listed' client is a client that one of our Field Engineers has requested to no longer work with for [insert reason]. Generally, clients are blacklisted for: Hazardous working environments or if they were extremely rude to the FE or any employee at our company.

A Black Listed client will be labeled as such in the 'Notes' section of their profile:



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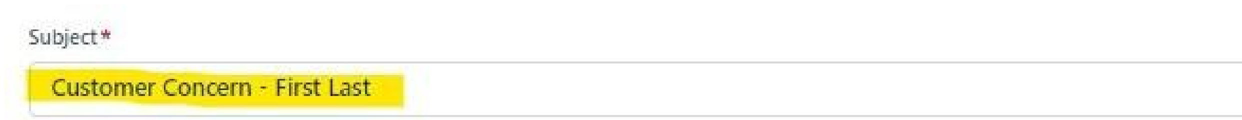


Four-Point Inspection

- A **FULL** 4-Point inspection is required during a service visit to provide a client a 2-week Warranty period with us. If even 1 of the 4 points of inspection are declined, they waive their right to any warranty with us and will be required to schedule a new billable appointment for continued service. The ONLY exception to this is either Helpdesk or the Field Engineer approving a Revisit, which they will then inform us to set up a Revisit.

- **Dispatchers are required** to inform the client that our Field Engineers will be providing a 4-Point inspection during the visit and that it provides a 2-week warranty period with us.

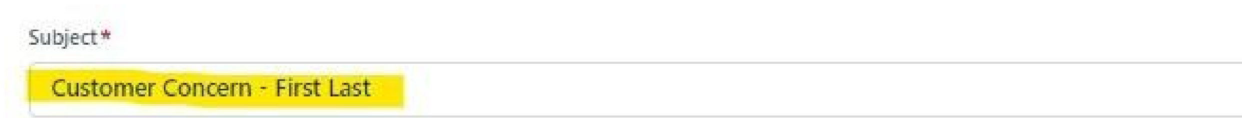
An example of how I like to inform clients of the 4-Point inspection, *"Once the Engineer has resolved your computer's difficulties, they will perform a quick 4-Point inspection on your system to ensure all the other components are still looking healthy. It also provides a 2-week warranty period with us, so if your system experiences any issues related to the visit, we'll send our Engineer back out for a complimentary service equal to the time they were on-site previously."*

- Typically, clients do not ask for more details on what the 4-Point inspection entails, but if they ask, the Four-Point Inspection consists of:

#1. Backup: 1, 2 ,3 Backup! Starting with 1 being the existing source of the data. Moving on to 2, the on-site back-up. Lastly 3, their Cloud back-up solution. Having an external backup is one step in the overall backup process; however, ALL clients SHOULD have a cloud-based solution. There are free alternatives and paid subscription suites. Whether a drive fails or catastrophe strikes, the data will remain available in the cloud, safe.

#2. SMART Check - Hard drive: This is a built-in tool for a hard drive or SSD to monitor its own vital values. This can give a very good idea of the overall health of the drive and therefore allow us to predict and avoid total failure of the drive. This gives us an opportunity to back up data before it's lost completely. This is extremely important for SSDs due to the difficulty of recovering data once they've failed.
- SMART is Self-Monitoring, Analysis, and Reporting Technology, it is a built-in self-test that can be used to indicate when an HDD is beginning to fail. It can be used on traditional hard drives, solid-state drives, and eMMC drives. HDD failures happen in two categories: predictable: slow degradation of chips or writing surface or unpredictable like physical trauma or electrical shock. According to one statistic, 60% of hard drive failure is caused by unpredictable failure, which includes heat and low voltage. The technology was first introduced in 1992 and while the information it provides is very good, taking the test at face value and waiting for it to say bad, is a sure way to lose data. The test will only tell you to drive ok or drive failure. This test will likely say it is ok, even if the drive is failing.

#3. Anti-Virus Solution: Having a good antivirus is not an option these days, it is mandatory. Antivirus is required on every single computer and the simple "they don't use it for anything will not suffice. At the end of the day, the internet can be a breeding ground for new viruses and scam messages. Given our client demographic it is necessary that we explain our process to our clients but more importantly walk them



through what AV is necessary or suited for their needs. There are threats both obvious and hidden that cause absolute havoc on people’s machines and in turn point the finger at us that we did not better prepare them for what happened to their system. Viruses and malware are common but more importantly, a good antivirus will prevent scam pop-ups and phishing instances which can lead to massive financial loss from a scammer who may gain access to banking credentials, etc.

#4. Network Check: Inspecting the network quality and signal to ensure they are getting the most out of their internet connection. Most people don’t understand how internet speeds will affect their overall network speed. Checking this can rule out some speed concerns for the End User. If they’re only getting 10 Mbps and they have 4 people trying to stream at the same time, it can lead to some misleading behavior. Checking this also allows an End User to know if they’re getting the speed they're paying for versus having issues with their hardware.

Ensuring your customers are informed about this inspection will leave no room for surprises when the engineer arrives on-site and requests to take a look at these big four items and increases the likelihood of a more fulfilling service starting at our hourly rate of $125 per hour.

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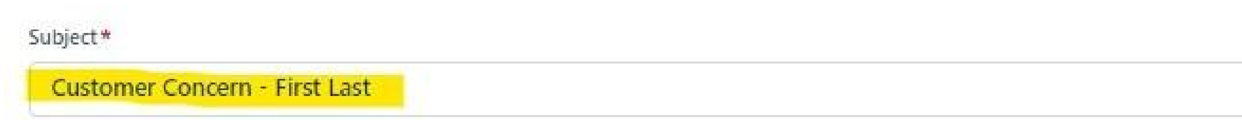
Subject*
Customer Concern - First Last

Slack Channel(s)

Various Slack Channels Dispatchers should be included in **(If you are not in any of these Slack channels, please DM a Manager so they can get you added)**:

#KTI: Main Company channel where all employees are able to communicate.
#Dispatchers: Main Dispatcher channel for communication.
#Appt-reservation: Channel where appointment windows are reserved to avoid double-booking
#Route-optimization: Channel where any route optimizations are posted and all optimization communication takes place.
#TFOs: Channel where any logged TFO is automatically posted and can be quickly reviewed by Management or other dispatchers
#Comms: Channel where Dispatchers report signing on/off, when they're taking lunch break, as well as any Cancellations that occur.
#Locations: Channel that reports FEs arriving and leaving a client's location. Used to determine where an FE is currently located.

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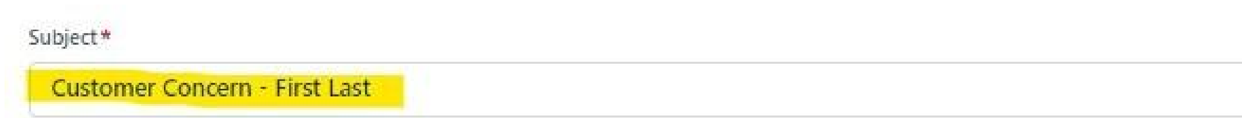

Devices We Do and Do Not Work On

As Dispatchers, it is not our job to diagnose and determine what steps are needed to resolve a client's computer issues. Our job is to gather information about a client's situation and schedule the appointments for our Field Engineers to handle.

The reasoning as to why we don't diagnose a problem over the phone is because we cannot rely on an EU's provided information alone since most of our clients do not have any idea what they're talking about. If we attempted to try and help a client over the phone, there is a strong chance that it could make their computer's issues even worse, which could cause potential liability issues. We have to get a Field Engineer on-site to diagnose the issue properly so we can provide clients high quality computer repair service.

In terms of part replacement, repair, upgrades, we let the customer know the engineer would need to get on-site to clarify exactly what they would need and help them order it. There are things such as pin counts, type of display (matte, glossy), screen resolution, revisions, and refresh rates these days that we won't be able to ensure from our dispatcher standpoint.

Below is a list of Devices and/or Situations that we **DO** work on and **should be booked**:

Screen Replacements

- Apple or Windows Laptops
- All-In-One Desktops (including iMac)

Hard Drive Replacement

- Need to get an FE on-site to source out compatible drive

Hardware Replacement(s) on Laptops/Desktops

- Need to get FE on-site to diagnose and source out replacement parts

RAM/CPU/GPU(Graphics Card) Upgrades

- Need to get an FE on-site to source out compatible upgrades for the client's system. Generally, a follow-up appointment is scheduled once the parts arrive to send the FE back out for installation visit.

Liquid Damage

- Need to get FE on-site to determine the extent of liquid damage to the system's various

components.

Computer Not Turning On

- Need to get FE on-site to determine the cause of the booting issues and help resolve them.

Blue Screen Error (BSOD)

- Need to get FE on-site to determine the cause of the BSOD Error and help resolve it.
- Includes Automatic Repair Loop, No HDD found on BOOT process

Virus/Malicious Software Removal

- Malware, Trojans, Spyware, Pop-Up Notifications, Rootkits, Ransomware, Worms, Keyloggers.

Email Setup

- Clients unable to send/receive emails
- Email setup on multiple devices
- Unable to access Email account

Network Setup/Installation

- Need to get FE on-site to source out

Data Recovery

- Need to get someone on-site to take a look at the equipment to see what is possible and/or needed.
- Generally, people pay $125 for the first visit. If data IS recoverable then we may be able to recover everything on-site.
- Older machines don't necessarily need to be completely functional for us to do so as we equip our engineers with units to recover data without the old machine working
- We do offer advanced solutions for data recovery in a clean room that we maintain.

Hinge Repairs

- Hinge repairs need someone on-site to further see if the hinge is the actual problem or if the plastics or metals of the laptop had become deteriorated, or just simply broken off. We need to get someone on-site for further investigation.

Home Surveillance System

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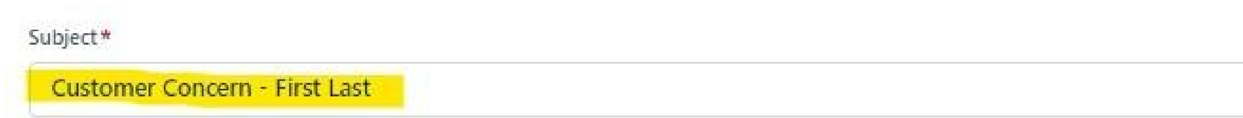

- **We don't do any mounting physical installs of the cameras**, but if they are already set up and just need to be configured/synced with network/devices, (IE, Ring, Arlo, Blink XT) we can set up and pair devices this way.

Updating BIOS

- Need to get FE on-site, but this is certainly a situation we can assist with.

System Setup

- Laptops, Desktops, Printers, Network Devices, TVs (no mounting), Firestick, Roku, Tablet, etc

Below is a list of Devices and/or Situations that we **DO NOT** work on and **should NOT be booked:**

Website Building

We do not build websites. However, if the EU is having issues with their server hosting through GoDaddy or another Web-hosting company, we can offer to get an FE on-site to take a look. We cannot make any guarantees.

Hardware Replacement(s) on Tablets or Phones or Televisions or Gaming Consoles

- Includes Apple iPads, Kindles, Samsung Tablets, iPhones, Android, XBox, PlayStation, etc
- We do not do ANY Hardware replacements of any kind on Phones or Tablets, Gaming Consoles, including Screen replacement, Battery Replacement, Charging Port, etc. We can only provide assistance for software issues.
- We can't replace hardware on TVs

Apple Device Locks:

- Activation Locked with EU having no access to the Apple ID displayed. This requires the original purchase receipt and to be brought to the Apple Store to unlock the device.
- MDM Locked. This requires the company that performed the lock to unlock the device.
- If the device is not currently locked, we can still help disable the ability of the device to trigger the lock.

Networking:

- Running network cable through walls/ceilings.

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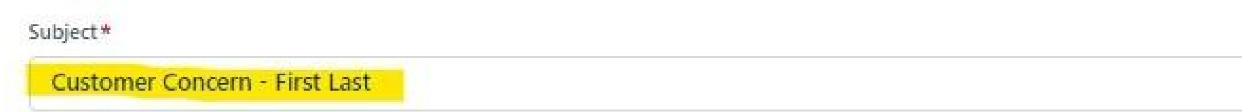

- Terminating networking cabling.

Hardware Replacement(s) on Microsoft Surfaces (Any Generation)

- HDD/SSD, Battery, Screen, or Motherboard replacements
- Surface Pros act similarly to Tablets and require full screen removal to replace any hardware, therefore we are unable to assist with Hardware Replacement on these devices.

Custom Loop Water Cooling

- Desktop with a custom water loop system
  (Closed Loop AIOs are fine! ExCorsair H110 (https://www.corsair.com/us/en/Categories/Products/Liquid-Cooling/Hydro-Series%E2%84%A2-H110-280mm- Extreme-Performance-Liquid-CPU-Cooler/p/CW-9060014-WW))
- Laptop with a custom water loop system

Printer Internal Repairs

- Hardware or part replacements. We can still send an FE out to diagnose the problem and potentially resolve the issue if it's software related, but we are limited with hardware replacement on printers.

Desktop Monitor Repair

- We do not repair individual monitor screens or ports. We generally recommend replacing the entire monitor.

Soldering

- We do not do any soldering work. Ultimately, we need to get an FE on-site to determine if replacement hardware requires soldering.

Mounting or Drilling

- We do not provide any mounting services (TV mounting/cameras) or drill holes into walls. If devices are already mounted, then we can assist with setup.

CryptoVirus Recovery

- Unless the EU has a backup, we cannot generally assist with data recovery
- Can recommend we get someone on-site anyways to clean up, and set up for the future and sign them up with a service like IDrive that stores data in the cloud concurrently for up to 30 days.

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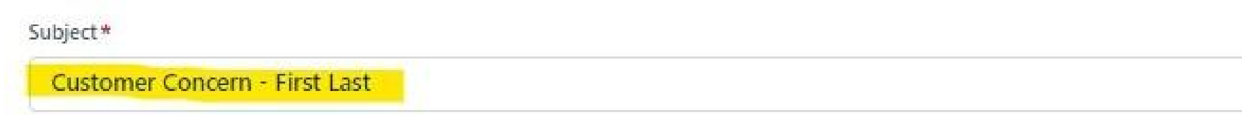

Crypto-Mining Setup

- We do not set up these devices.

Illegally Modify Legal Documents

- This should be obvious but we do not offer this as a service.

Control4 Smart Home

- Too many factors involved. So we avoid these setups.

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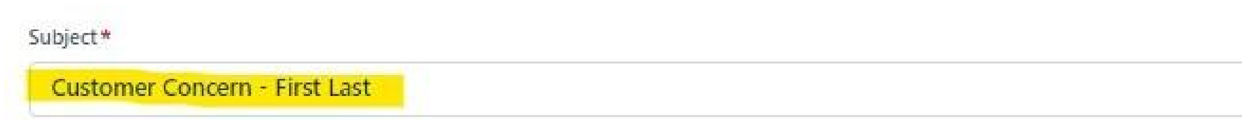

General Estimates for Repairs

- Typical service visits range anywhere between **1.5-2.5 hours of time on-site. ($125 - $250)**

- However, it ultimately depends on what the FE determines once they've had a chance to review the client's system.

If hardware replacements are needed to resolve a client's issues, the FE will generally be able to determine that within the 1st hour of service and help source out those parts for the client to order. Then we'd set up a follow-up for any installation required, which would be standard 1-2 hour TOS average.

- Hardware needed? Two Visits. 1st visit to source out replacement parts (Likely 1st hour), 2nd visit to install (1-2 hours)

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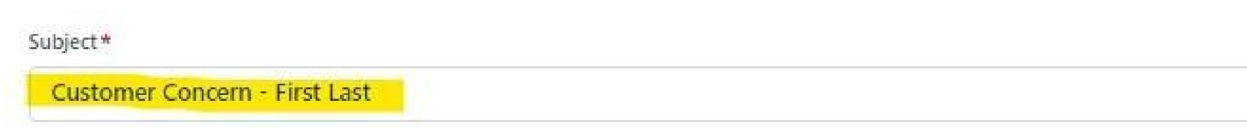

Remote Visits

Remote visits are where one of our Field Engineers will remote into a client's computer and resolve their system's issues over the phone. The FE is on the phone with the client the entire service visit and collects payment over the phone once the service is completed.

Remote Service Visits are charged at the same $125 hourly rate, but do not include a $4 fuel surcharge.

Things to consider/confirm with the client prior to scheduling a remote service:

- **Is the system able to turn on and stay powered on?**
- **Is the EU able to interact with the system?**
- **Is the system able to connect to the internet?**

If a client is able to connect to the internet on their device, but their system randomly shuts off on them after a few minutes of use, we would likely want to schedule that as an on-site visit since the FE may need to check out hardware issues prior to diagnosing software issues.

Can we help with this issue Remotely?

Yes: **Can be handled remotely**

- **Email Issues:** Setup, Password Reset/Retrieval, Settings Adjustment, "Not Sending or Receiving my mail", Setting up a new Email and transferring Contacts
- **Browser Issues:** Browser Setup, Settings Adjustment, Pop-Up Notifications, Changing Default Browser,
- **System Cleanup:** Performance Optimization, **Virus and/or Malware Removal**,
- **Back-Up and Recovery:** Finding missing file(s)
- **Software Installation and Updates**:
- **Cloud Storage Setup and Maintenance**: Full Storage Issues,

No: Requires on-site visit

- **Display Issues**: System not showing display on bootup
- **Booting Issues:** System not booting or turning on at all.
- **Damaged Hardware**: Cracked casing, screen damage, any physical damage to system
- **Brand New System Setup**
- **Hardware Installation:** Network Hardware Setup (Router/Modem setup, Mesh Network setup, ie - physical installation of network devices)
- **Peripheral devices not responding (mouse, keyboard, etc)**
- **Liquid Damage**
- **External HDD Data Recovery**

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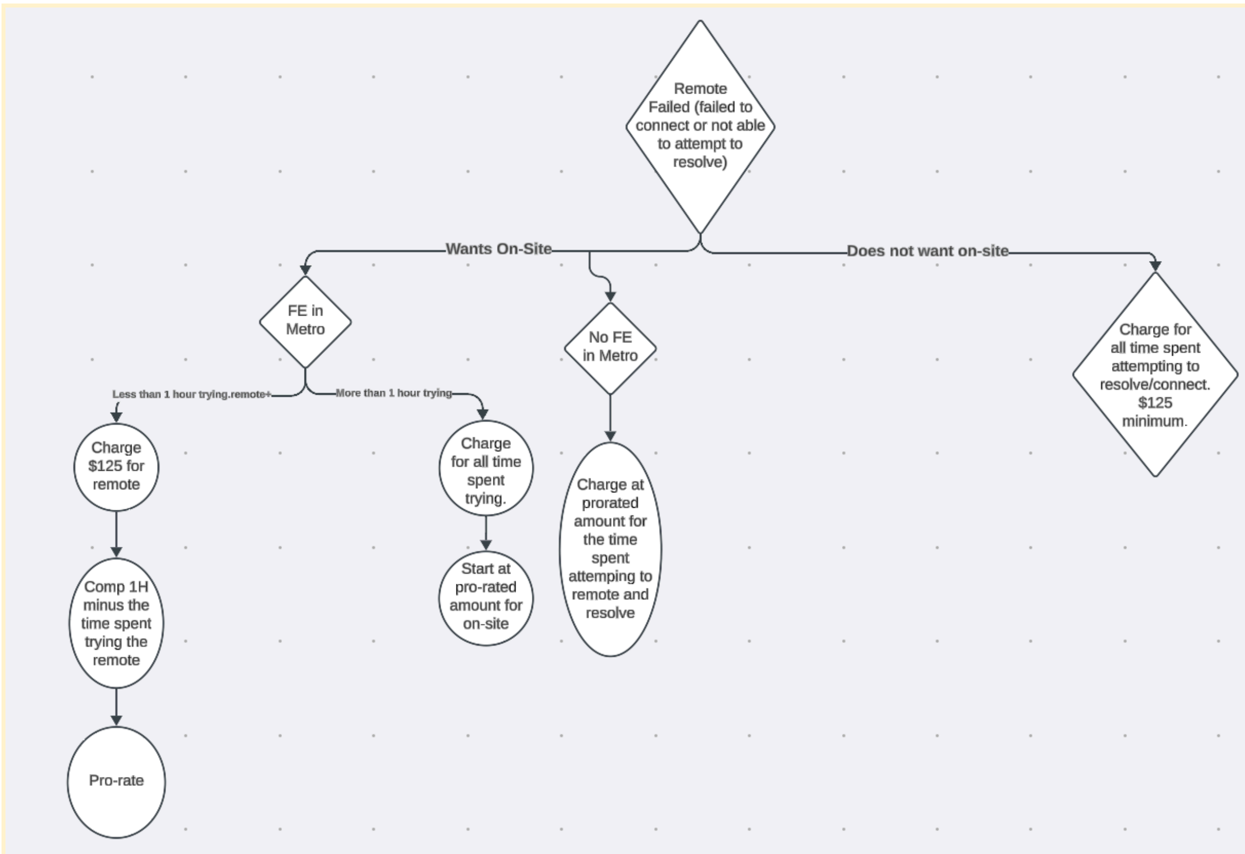
Subject*

Customer Concern - First Last

Failed Remotes.



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Subject*

Customer Concern - First Last

N-Able - Currently handled by Corey.Northfield and all N-able related information should be forwarded to him so he can update his info on the back-end.

N-Able Managed Anti-Virus for Dispatch

- **PLUS** for **$75 per year** -- Standard Anti-Virus & management
- **PRO** for **$150 per year** -- Includes all of PLUS and Monthly Clean-outs, detailed monitoring of device

General Questions:
- **Subscriptions**: Are renewed for an annual (yearly) basis via Square. All invoices will be automatically set to be sent at the first of each month and set to be due on the date that the subscription expires. It will be sent to the email address on file, it was provided either by the FE who set up the install or the EU provided an updated email.

- **Cancellations:** EU can choose to cancel by either emailing us directly or calling us. Cancellation will be processed by Corey Northfield typically when notice is received. Please do NOT cancel any Square invoices for N-Able. Only either Corey Northfield will cancel the invoice as it must be properly recorded in multiple systems.

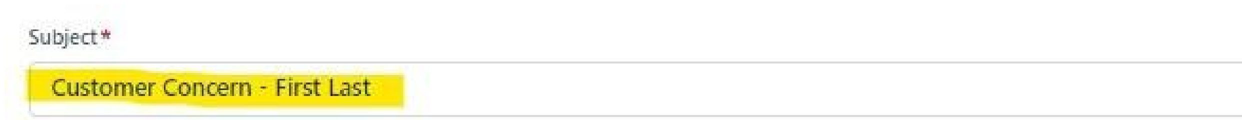
- Paying Invoice: Renewals must be paid for within Square. Payment can be accepted via the invoice link sent to their email address or over the phone with a dispatcher that has Square access. If you do not have Square access, you can transfer the call to someone who does or if no one is available, contact Corey Northfield (weekdays).

- Updating Payment Information: We only keep payment information like card numbers on file for N-Able Customers. If the EU would like to use a new or different card they can enter it when using the link they were provided to pay their invoice.

- Installation: Installation and setup must be completed onsite by an FE. The FE will process payment for the initial year. The FE will obtain information needed for renewal and will forward it on to the N-Able team (Corey Northfield) at Karls.

- Updating Email: If an existing N-Able subscriber needs to update the email address on file getting the invoice, take down the new email address and send it via DM to Corey Northfield. Inform the EU that the email will be updated for the future.

- Transfer: N-Able can be transferred from one device to another. An FE or helpdesk must perform the transfer, it can be done remotely. The appointment is free as long as it only involves N-Able. Anything beyond it, will incur our normal rate and charges. If no FE is available, message helpdesk to determine if any are available to perform the remote. If you are able to



book the remote, please make sure to inform the person assigned the ticket via DM the details and reasoning for the ticket.

- N-Able Tickets: For any tickets via FreshDesk, if it is not something you can immediately answer using this document, you can contact Corey Northfield (weekdays). If he is not available, send him the URL of the ticket and the general summary.

- **N-Able Calls**: If you get any calls about N-Able, if it is not something you can immediately answer using this document, you can **forward their information like their name, phone number and reason for calling to either Corey Northfield. They can also email Corey directly at coreynorthfield@karlstechnology.com**.

- Renewals: Once the renewal invoice is paid, it will be processed by Corey Northfield. A KTI ticket is generated to process the renewal and payment. If an EU calls in saying they got an email saying that they have an appointment scheduled, please inform them that the email is merely us processing the renewal.

- Multiple subscriptions: If an EU has multiple subscriptions with us, they can request to put them all on the same date. They can discuss with Corey Northfield directly via either phone or email.

- Refunds: A full refund can be issued if requested within 14 days of the date of renewal. Otherwise, a partial refund of 50% can be requested/issued if within the first 6 months of the renewal. If a refund is requested with less than 6 months remaining on their subscription, it will be prorated based on the amount of time remaining in their subscription.

Carbonite

Carbonite is the Cloud Data Backup solution that we recommend to clients to backup and preserve their data.

We do NOT take payments directly for Carbonite. Clients must go through Carbonite to pay for the software.

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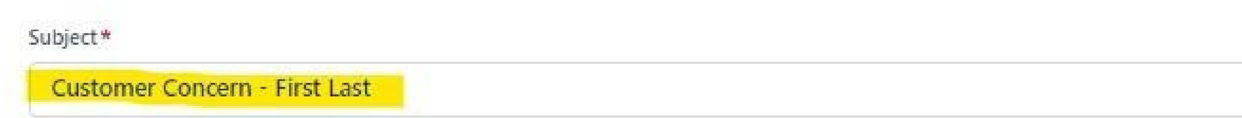
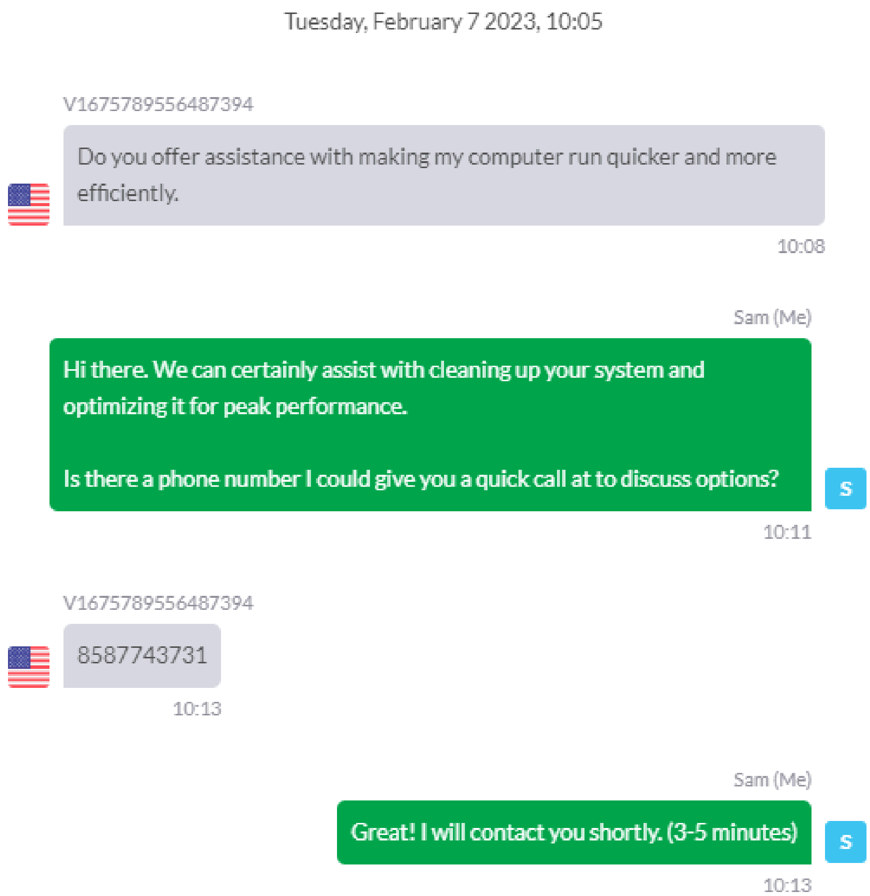


Tawk.To

- Tawk.To is our live-chat program offered on every website we have for clients to quickly ask a question.

- The main goal of Tawk.To is for us to **get the client on the phone** as quickly as possible. We are **NOT** aiming to answer all of a client's questions or schedule an appointment over live-chat.

This is an example of how 9/10 of Tawk.To conversations should look. The client will ask if their issue is something we can assist with, we respond with yes and ask for a phone number to discuss.



"We can certainly send an engineer out to assist with your PC's current difficulties. Is there a phone number I could give you a quick call at to discuss options?"

There are times when clients will ask how much we charge. We want to avoid providing that information over live-chat because a client can simply take the info and leave without further communication. We have a much more probable chance to book a client if they're on the phone.

How I respond to clients that request a price quote over live chat:

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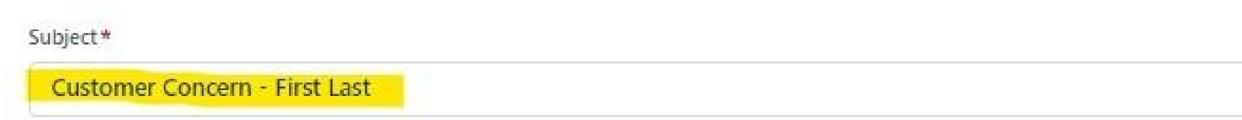

"Unfortunately, it is difficult to determine an accurate price quote without gathering additional details about your system's difficulties. Is there a phone number I could give you a quick call at to discuss further?"

Typically, the EU will then provide a good contact number for us to call. If they persist in getting a quote over the chat or say they are unable to use their phone currently, then you can let them know how we charge.

"We charge for the time that our Field Engineer spends on-site with you at an hourly rate of $125.00 per hour, prorated after the first hour. Typical visits last between 1-2 hours, but it ultimately depends on what your system's issue is. If you'd like to setup an appointment, please submit an appointment request on our website."

Most often, though, clients will provide their phone number and we would then call them with the phone number associated with the website they're using for the live chat.

Data Recovery

- Our Field Engineers carry the tools and software necessary to recover data from a standard HDD or SSD. Generally, we don't need a computer to be operational in order to recover the data as oftentimes we can pull the HDD and recover from there.

- SD Cards, USB Thumb Drives, or other data storage devices will require the FE on-site to determine any specific adapters or other equipment that may be required to attempt recovery.

- **We CANNOT PROVIDE ANY GUARANTEES OF RECOVERY.** We do not know the current state that a client's drive is in, so we have to send an Engineer out to determine what is recoverable on-site.

- If Data is not recoverable on-site, we do have options for Clean Room Data Recovery.

Clean Room Data Recovery

- When a Field Engineer is unable to recover a client's information on-site, we do have alternative options to further attempt recovery of that client's data that we offer, such as a clean room recovery.

- A clean room recovery consists of the Field Engineer taking the client's drive off-site and shipping it to our clean room in Phoenix, Arizona to attempt more advanced methods of recovery.

- **A Clean Room recovery requires the client to pay a $250 initial deposit, on-top of normal TOS, to cover shipping costs and goes towards any additional fees the recovery may incur. This initial deposit is charged on-top of the TOS the Field Engineer has already accrued.**

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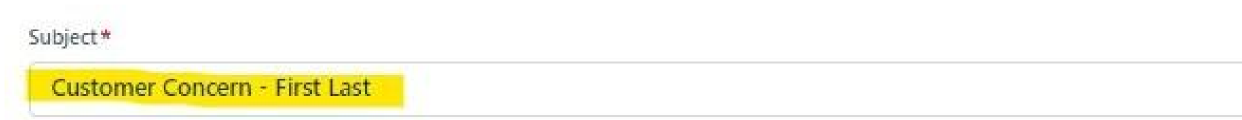


- Typically, **clean room recoveries average anywhere between $1,000 - $2,000**

Currently, **@Sam** (Dispatch Team Lead) handles Clean Room Data Recovery Clients and should have any of their information forwarded to him in Slack DM.

- -

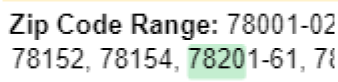
Trip Fees

- When a client is located outside the normal service visit range, **we can still send the Field Engineer out to help the client for an additional $45 trip fee on-top of TOS and $4 fuel surcharge.**

- To determine whether a client's address/zip requires a trip fee, refer to the Zip Code Service Range section and check if the client's ZIP is included in the serviceable range.

Find Function (Cntrl - F/Command - F) is your friend to quickly find zip codes.

Example: If you're looking for the zip code 78201, search the first four digits (7820) as some zips are listed in sections, ie 78201-61



If the ZIP is NOT included, you can assume a trip fee is required. (Ping a Dispatch Manager for confirmation if you're unsure)

- You can also check out this doc containing a rough estimate of the covered area for each metro:
FE Coverage per Metro

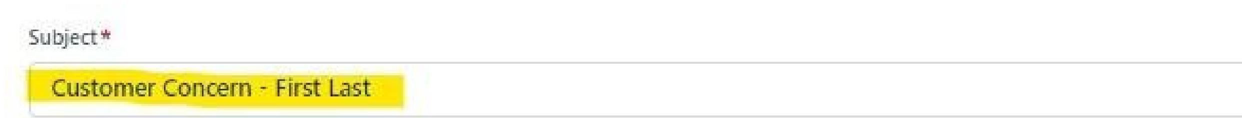
Phone Number Directory / Zip Code Service Range

https://karlstechnology.freshdesk.com/a/solutions/articles/11000085657

San Antonio Metro Phone Number: **210-787-1120**
Areas Serviced: Adkins, Alamo Heights, Artesia Wells, Atascosa, Castle Hills, Cibolo, Converse, Ecleto, Elmendorf, Holetes, Kirby, Leon Springs, Macdona, Olmos Park, Saint Hedwig, San Antonio, Shavano Park, Schertz, Terrell Hills, Universal City, Von Ormy, Wetmore, Windcrest
Zip Code Range: 78001-02, 78023, 78054, 78073, 78101, 78108-09, 78111-12, 78148, 78150, 78152, 78154, 78201-61, 78263-66, 78268-70, 78278-80, 78283-85, 78288-89, 78291-99

- -

Cleveland Metro **Phone Number**: **216-294-4800**



Areas Serviced: Beachwood, Bratenahl, Brook Park, Brooklyn, Brooklyn Heights, **Cleveland**, Cleveland Heights, Cuyahoga Heights, East Cleveland, Euclid, Garfield Heights, Highland Hills, Hunting Valley, Independence, Lakewood, Linndale, Maple Heights, Middleburg Heights, Moreland Hills, Newburgh Heights, North Olmsted, North Randall, Orange, Parma, Parma Heights, Pepper Pike, Richmond Heights, Seven Hills, Shaker Heights, South Euclid, University Heights, Valley View, Warrensville Heights, Woodmere

Zip Code Range: 44101-47, 44181, 44188, 44190-95, 44197-99

Houston Metro: **281-860-2550**

Areas Serviced: Addicks, Alvin, Arcola, Baytown, Bellaire, Brookshite, Brookside Village, Bunker Hill Village, Channelview, Cleveland, Clodine, Conroe, Crosby, Cypress, Deer Park, El Lago, Dickinson, Fresno, Friendswood, Fulshear, Galenda Park, Hedwig Village, Highlands, Hilshire Village, Hitchcock, Hockley, **Houston**, Huffman, Humble, Hunters Creek Village, Iowa Colony, Jacinto City, Jersey Village, Katy, Kemah, Kingwood, Klein, La Porte, League City, Liverpool, Magnolia, Manvel, Meadows Place, Missouri City, Mont Belvieu, Montgomery, Nassau Bay, New Caney, Pasadena, Pattison, Pearland, Pinehurst, Piney Point Village, Plum Grove, Porter, Richmond, Romayor, Rosenberg, Rosharon, Rye, Santa Fe, Seabrook, Simonton, South Houston, Spendora, Spring, Spring Valley Village, Stafford, Sugar Land, Taylor Lake Village, The Woodlands, Thompsons, Tomball, Webster and West University Place

Zip Code Range: 77001-099, 77201-210, 77212-13, 77215-31, 77233-38, 77240-45, 77248-49, 77251-59, 77261-63, 77265-75, 77277, 77279-80, 77282, 77284, 77287-93, 77297, 77299

Detroit Metro: **313-484-4840**

Areas Serviced: Allen Park, Dearborn, Dearborn Heights, **Detroit**, Ecorse, Hamtramck, Highland Park, Inkster, Lincoln Park, Melvindale, Redford, River Rouge and Taylor

Zip Code Range: 48201-40, 48242-44, 48255, 48260, 48264-69, 48272, 48275, 48277-79, 48288

St. Louis Metro: **314-788-3400**

Areas Serviced: St. Louis, St. Charles, St. Peters, Chesterfield, Belleville, Maplewood, Oakville, Wildwood, Ballwin

Zip Code Range: 63101-41, 63143-47, 63150-51, 63155-58, 63160, 63163-64, 63166-67, 63169, 63171, 63177-80, 63188, 63195, 63197, 63199

Indianapolis Metro: 317-779-1310

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Spring Hill / Tampa Metro **Phone Number**: **352-794-1085**

Daytona Beach (Orlando Metro): **386-456-4345**

Oklahoma City Metro: **405-400-9010**

Orlando Metro: **407-801-6120**

Baltimore Metro: **410-826-4446**

Pittsburgh Metro: **412-912-1210**

Milwaukee Metro: 414-867-7005

Dallas Metro: 469-299-9005

Areas Serviced: **Dallas,** Addison, Allen, Balch Springs, Carrollton, Cedar Hill, Coppell, DeSoto, Duncanville, Farmers Branch, Flower Mound, Frisco, Garland, Grand Prairie, Highland Park, Highland Village, Irving, Lancaster, Lewisville, Little Elm, Lucas, McKinney, Mesquite, Murphy, Plano, Prosper, Red Oak, Richardson, Rowlett, Sachse, Seagoville, Sunnyvale, The Colony, University Park, Wylie

Zip Code Range: 75001-02, 75006-07, 75010-11, 75013-17, 75019, 75022-30, 75033-36, 75038-54, 75056-57, 75059-64, 75067-72, 75074-75, 75077-78, 75080-86, 75088-89, 75093-94, 75098-99, 75104, 75106, 75115-16, 75123, 75134, 75137-38, 75146, 75149-50, 75154, 75159, 75180-82, 75185, 75187, 75201-12, 75214-38, 75240-44, 75246-54, 75260-67, 75270, 75275, 75277, 75283-85, 75287, 75301, 75303, 75312-13, 75315, 75320, 75326, 75336, 75339, 75342, 75354-60, 75367-68, 75370-74, 75376, 75378-82, 75389-95, 75397-98

Phoenix Metro:
480-240-2946, 480-240-2950, 480-240-2960, 480-240-2965, 480-240-2984, 480-240-2985, 480-269-6033, 480-442-0353, 480-442-0545, 480-648-4805, 480-666-5832, 480-788-1240, 480-788-6004, 480-788-6033, 480-867-4510

Main Company Number: 480-999-3046

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Areas Serviced: Apache Junction, Ahwatukee, Gold Canyon, Cave Creek, Carefree, Fountain Hills, Paradise Valley, Queen Creek, San Tan Valley, Gilbert, Mesa, Scottsdale, Chandler, Tempe, **Phoenix**, Sun Lakes, Higley

Zip Code Range: 85001-46, 85048, 85050-51, 85053-54, 85060-76, 85078-83, 85085-87, 85117-20, 85140, 85142-43, 85178, 85201-16, 85224-26, 85233-34, 85236, 85244, 85246, 85248-64, 85266-69, 85271, 85274-75, 85277, 85280-87, 85295-99, 85327, 85331, 85377

Louisville Metro: **502-977-5100**

Austin Metro: 512-686-2300

Cincinnati Metro: 513-810-4550

Tucson Metro: 520-526-9940

Areas Serviced: **Tucson**, Casas Adobes, Catalina Foothills, Oro Valley, Marana, Sahuarita, Drexel Heights, Green Valley, Tanque Verde, Vail, Valencia West, Catalina, Corona de Tucson, Nogales, Fort Huachuca, Rincon Valley

85701-26, 85728, 85730-52, 85754-57, 85775, 85613-14, 85621-22, 85628-29, 85641, 85648, 85653, 85658, 85670, 85738-39

Miami Metro: 561-208-8005

Areas Serviced: Boca Raton, Boynton Beach, **West Palm Beach**

Zip Code Range: 33401-22, 33424-29, 33431-37, 33464, 33472-74, 33481, 33486-88, 33496-99

Phoenix Metro:
602-445-9862
602-633-4584
602-892-3535

Areas Serviced: **Phoenix**, Laveen

Zip Code Range: 85001-24, 85026-46, 85048, 85050-51, 85053-54, 85060-76, 85078-80, 85082-83, 85085-87, 85339

Minneapolis Metro: 612-404-2240

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Subject*

Customer Concern - First Last

Columbus Metro: 614-964-0080

San Diego Metro: 619-393-8620

Phoenix Metro: 623-295-2645

Areas Serviced: Avondale, Glendale, Buckeye, Goodyear, Peoria, Surprise, Sun City, Sun City West, **Phoenix**

Zip Code Range: 85001-24, 85026-46, 85048, 85050-51, 85053-54, 85060-76, 85078-80, 85082-83, 85085-87, 85301-12, 85318, 85323, 85326, 85338, 85345, 85351, 85372-76, 85378-83, 85385, 85387-88, 85392, 85395-96

Nashville Metro: 629-213-4100

St. Paul Metro: 651-352-4620

Atlanta Metro: 678-695-8120

Areas Serviced: Alpharetta, Atlanta, Johns Creek, Roswell, Sandy Springs

Zip Code Range: 30004-05, 30009, 30022-24, 30075-77, 30097, 30301-22, 30324-29, 30331-34, 30336-46, 30348-50, 30353-64, 30366, 30368-71, 30374-75, 30377-78, 30380, 30384-85, 30388, 30392, 30394, 30396, 30398, 31106-07, 31119, 31126, 31131, 31136, 31139, 31141, 31145-46, 31150, 31156, 31192-93, 31195-96, 39901

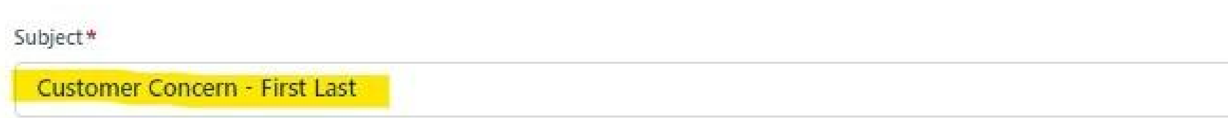
Las Vegas Metro: 702-800-7850

Areas Serviced: **Las Vegas**, Henderson, North Las Vegas, Paradise, Enterprise, Sunrise Manor, Spring Valley, Summerlin, Summerlin South, Boulder City

89002, 89005-06, 89009, 89011-12, 89014-16, 89030-33, 89036, 89044, 89052-54, 89074, 89077, 89081, 89084-87, 89101-66, 89169-70, 89173, 89177-80, 89183, 89185, 89191, 89193, 89195, 89199

Denver Metro: 720-441-6460

Areas Serviced: Arvada, Aurora, Brighton, Broomfield, Boulder, Centennial, Cherry Hills, Columbine, Commerce City, **Denver,** Englewood, Glendale, Golden, Greenwood Village, Highlands Ranch, Ken Caryl, Lafayette, Lakewood, Littleton, Louisville, Lonetree, Northglenn,



Parker, Sherrelwood, Superior, Thornton, Westminster, Wheatridge

Zip Code Range: 80001-07, 80010-23, 80026-27, 80030-31, 80033-38, 80040-42, 80044-47, 80110-13, 80120-30, 80134, 80138, 80150-51, 80155, 80160-63, 80165-66, 80201-12, 80214-39, 80241, 80243-44, 80246-50, 80256-57, 80259-66, 80271, 80273-74, 80281, 80290-91, 80293-94, 80299, 80301-10, 80314, 80401-03, 80419, 80439, 80601-03, 80640

St Petersburg / Tampa Metro Phone Number: 727-350-1090

Areas Serviced: Bayonet, Clearwater, Dunedin, Elfers, Gulfport, Holiday, Hudson, Jasmine Estates, Largo, New Port Richey, Palm Harbor, Pinellas Park, Safety Harbor, St. Pete Beach, **St. Petersburg,** Tarpon Springs, Trinity

Zip Code Range: 33701-16, 33729-34, 33736, 33738, 33740-43, 33747, 33755-67, 33769, 33770-71, 33773-74, 33776-82, 33784, 34652-56, 34667, 34669, 34674, 34680, 34682-85, 34688-92, 34695, 34697-98

Miami Metro: 754-241-1655

Areas Serviced: Coral Springs, Davie, Deerfield Beach, **Fort Lauderdale,** Hollywood, Miramar, Plantation, Pompano Beach, Sunrise, Weston

Zip Code Range: 33019-29, 33060-69, 33071-77, 33081, 33083-84, 33093, 33097, 33301-32, 33334-40, 33345-46, 33348-49, 33351, 33355, 33359, 33388, 33394, 33441-43

Minneapolis Metro: 763-515-4910

Miami Metro: 786-780-1540

Areas Serviced: Coral Gables, Hialeah, Miami, Miami Gardens, Miami Beach

Zip Code Range: 33002, 33010-18, 33101-02, 33106, 33109, 33111-12, 33114, 33116, 33119, 33122, 33124-38, 33140-47, 33150-58, 33160-70, 33172-99, 33206, 33222, 33231, 33233-34, 33238-39, 33242-43, 33245, 33247, 33255-57, 33261, 33265-66, 33269, 33280, 33283, 33296, 33299

Salt Lake City Metro: 801-679-2640

Areas Serviced: Salt Lake City, Bluffdale, Bountiful, Centerville, Cottonwood Heights, Draper, Farmington, Herriman, Holladay, Kearns, Magna, Midvale, Millcreek, Murray, North Salt Lake, Riverton, Sandy, South Jordan, South Salt Lake, Taylorsville, West Jordan, West Valley City, Woods Cross

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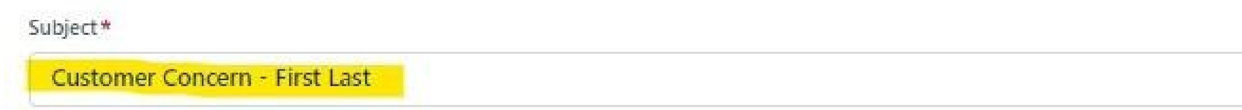

Zip Code Range: 84009-11, 84014, 84020, 84025, 84044, 84047, 84054, 84065, 84070, 84081, 84084, 84087-88, 84090-96, 84101-34, 84141, 84143, 84145, 84147-48, 84150-52, 84157-58, 84165, 84170-71, 84180, 84184, 84190, 84199

Richmond Metro: 804-665-0030

Tampa / Tampa Metro Phone Number: 813-400-2865

Areas Serviced: Tampa, Apollo Beach, Brandon, Carrollwood, Cheval, Citrus Park, East Lake, East Lake-Orient Park, Egypt Lake-Leto, Gibsonton, Keystone, Lake Magdalene, Land O' Lakes, Lutz, Northdale, Oldsmar, Palm River-Clair Mel, Plant City, Riverview, Ruskin, Seminole, Shady Hills, Temple Terrace, Thonotosassa, Town 'n' Country, University, Valrico, Wesley Chapel, Westchase, Zephyrhills

Zip Code Range: 33508-11, 33539-45, 33572, 33548-49, 33558-59, 33563-73, 33575, 33578-79, 33592, 33594-96, 33601-26, 33629-31, 33633-35, 33637, 33646-47, 33650, 33655, 33660-64, 33672-75, 33677, 33679-82, 33684-89, 33694, 33772, 33775-78, 34201, 34610, 34677

Kansas City Metro: 816-307-7010

Fort Worth / Dallas Metro: 817-756-6008

Areas Serviced: Fort Worth, Arlington, Bedford, Benbrook, Burleson, Colleyville, Euless, Grapevine, Haltom City, Hurst, Keller, Mansfield, North Richland Hills, Saginaw, Southlake, Trophy Club, Watauga

Zip Code Range: 76001-08, 76010-19, 76021-22, 76028, 76034, 76036, 76039-40, 76051, 76053-54, 76063-64, 76092, 76094-97, 76099, 76101-24, 76126-27, 76129-37, 76140, 76147-48, 76150, 76155, 76161-64, 76166, 76177, 76179-82, 76185, 76190-93, 76195-99, 76244, 76248, 76262

Memphis Metro: 901-422-6700

Jacksonville Metro: 904-497-4300

Kansas City Metro: 913-440-0320

Raleigh Metro: 919-439-7770

Areas Serviced: Raleigh, Durham, Cary, Chapel Hill, Goldsboro

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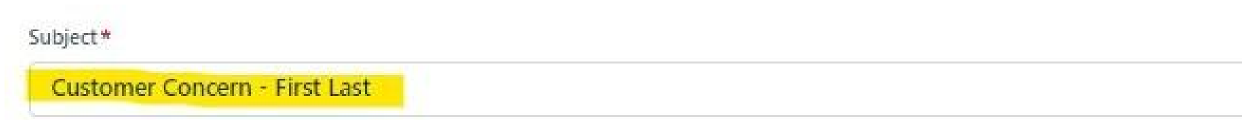

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Denton / Dallas Metro: 940-227-6950

Areas Serviced: Denton, Wichita Falls, Decatur, Gainesville, Vernon

Zip Code Range: 76201-10, 76234, 76240-41, 76301-02, 76305-10, 76384-85

Minneapolis / St.Paul Metro: 952-333-0320

Charlotte Metro: 980-500-8310

Google Reviews

- 5-Star Google Reviews will generate a ticket in our Dispatch Queue. These reviews are posted in the main KTI channel to cheer on the FE who received the review and motivate other Field Engineers to try and get a review on the next visit.

- Field Engineers receive additional compensation for every 5-Star Google review they receive.

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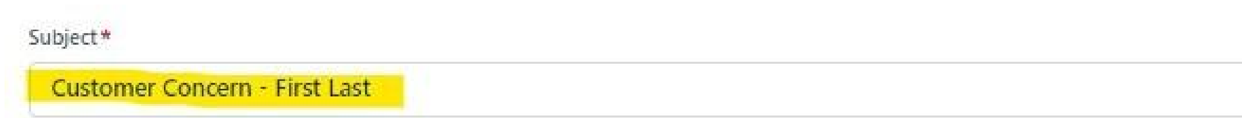


Handling Customer Concerns

Clients will call in regarding a previous visit and may not be satisfied with the level of service they received. Here is the process we should take when we receive these calls.

- If the client is calling in about their system "*still doing the same thing it was before the FE came out.*"

Check if the client received a full [4-Point inspection] during their original service visit by navigating to the Work Order URL and scanning the FE's notes. **If the client had a full 4-Point inspection and is contacting us within 2 weeks of the service visit date, and the issue clearly related to the work performed, we immediately offer to set up a Revisit appointment for the client to send the FE back out for a complimentary visit** (up to the TOS the FE had on previous visit).

If the client did NOT receive a full 4-Point inspection, they do NOT immediately qualify for revisit, so we offer to set up a new billable service for them to send an FE back out asap. Clients may not approve of that option, so then we would inform the client that we will forward their inquiry to the FE and have the FE contact the EU at their earliest availability to discuss the situation. Refer to How to properly inform an FE to call a client for this procedure.

From there, the FE will contact the EU and let Dispatch know if we can set up a Revisit appointment for this client.

- If the client is calling in requesting any type of financial reimbursement, refund, reduction, etc

- First, offer to set up a Revisit if the EU qualifies.

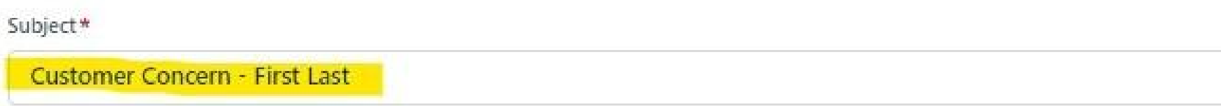
- If the EU declines the Revisit or does not qualify for a revisit. Advise EU you will gather their information and notify management of their request. Dispatchers do not have the clearance to issue any type of refunds to clients and your response should be similar to this:

"Unfortunately, I'm just a dispatcher so I'm unable to approve any type of refund for previous services. I will forward your request to Management and they will reach out to you by e-mail once they've had a chance to review the situation."

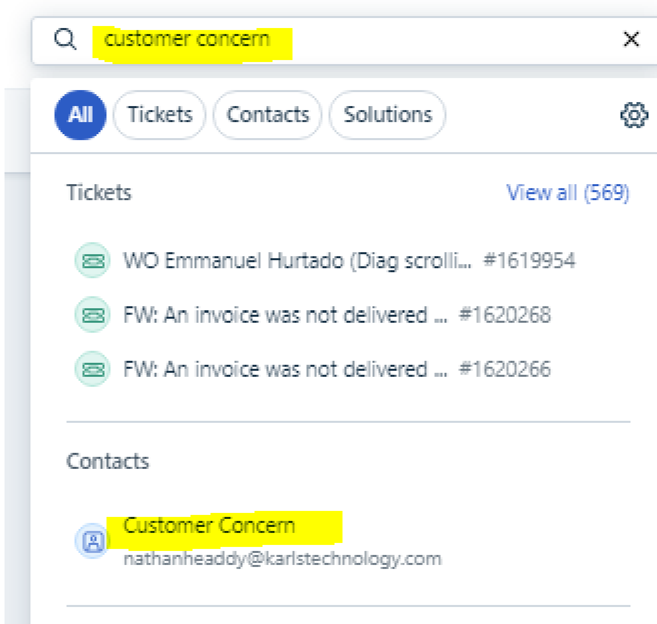
Developing a Customer Concern Ticket

To properly submit a Customer concern to Helpdesk for review, follow these steps:

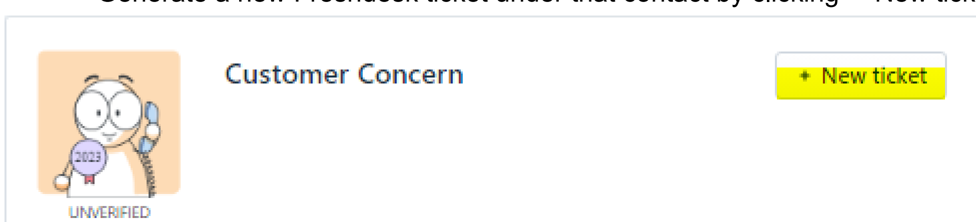
PRIOR TO CREATING A CUSTOMER CONCERN, CHECK IF THE CLIENT ALREADY HAS AN EXISTING CONCERN TICKET OPEN BY SEARCHING THEIR NAME IN FRESHDESK



1. Search for the phrase "Customer Concern" in Freshdesk and click on the Customer Concern contact.



Generate a new Freshdesk ticket under that contact by clicking '+ New ticket' to the right.



2. Fill out the client's information into the required boxes.
The e-mail address must remain as "Customer Concern" <nathanheaddy@karlstechnology.com>

- Enter EU's first and last name

- Enter EU's Phone Numbers

- The subject line will be used so dispatch or helpdesk can easily find customer concerns inside of Freshdesk by seeing the term "Customer Concern" when searching for a customer's name. **Please**

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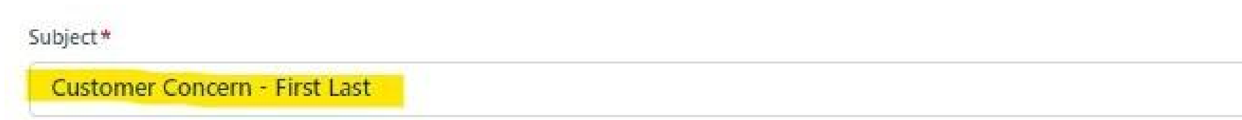
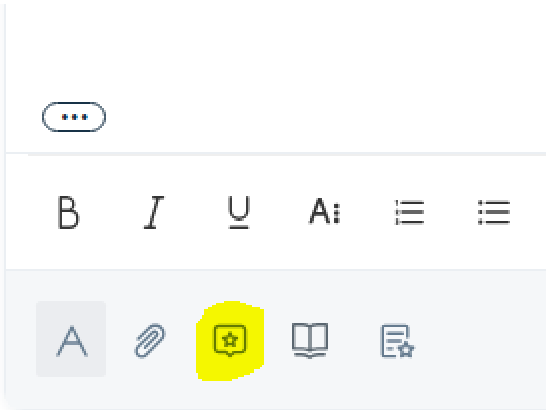
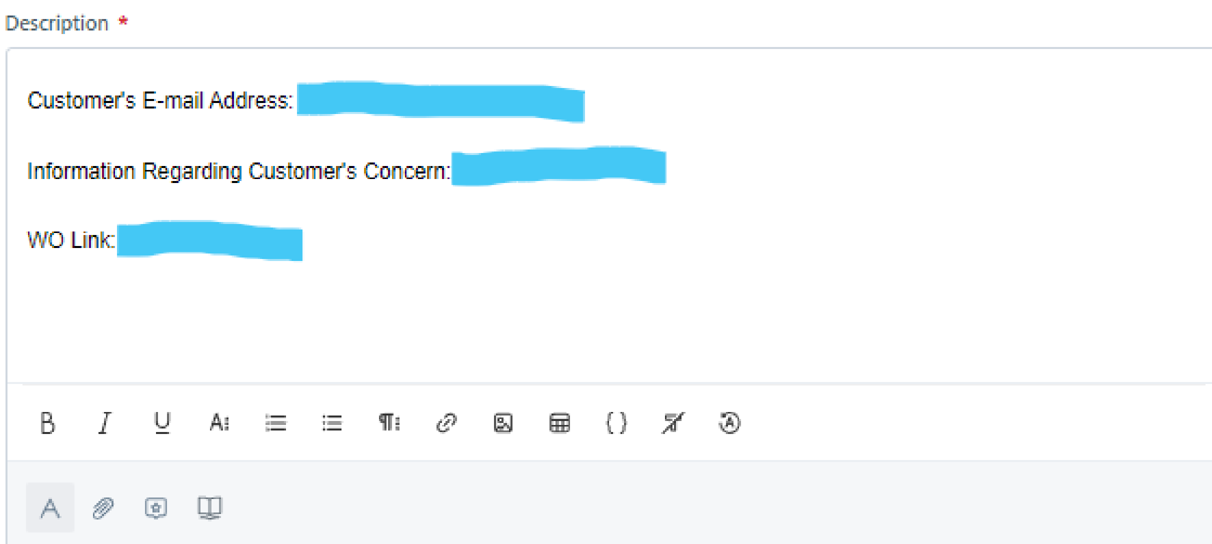


follow the example "Customer Concern - First Last" as seen below to allow for this.
- **Description** To insert the template for the description. Click on the 'Canned Responses' button (highlighted in yellow below) at the bottom of the description box.



Then click on 'Concern Template', followed by the + sign (highlighted in green below) to insert the template.

- **Fill out the description according to the template.**



Here is an example of how to fill out the template:

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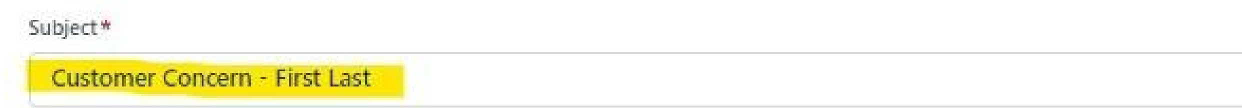


Customer's E-mail Address: EU@email.com

"Information regarding the customer's concern: Client is stating that the FE over-charged them for the amount of time that they were on-site. EU was informed that management would review the situation and reach back out with a resolution once they've reviewed the case.

WO link: https://karlstechnology.freshdesk.com/a/tickets/######"

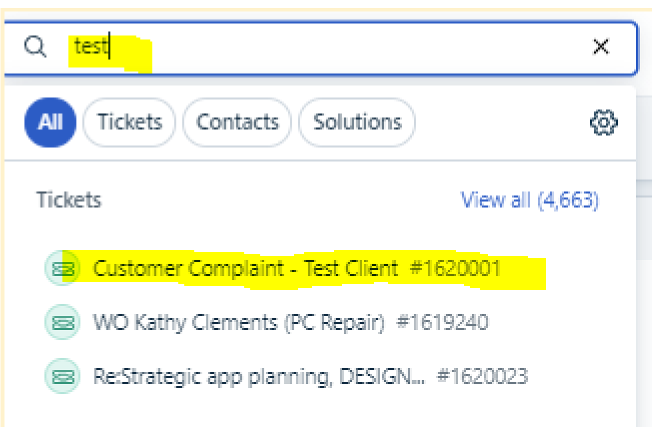
3. Once the information is filled out, you will **click the 'Create' button at the bottom-right of the screen** to generate the ticket.

4. Once the ticket is created, you will go to **execute scenarios and select 'Finish Customer Concern**'. Doing this will ping Helpdesk in their own channel that a ticket was generated for them to review.

5. Finally, **copy the link for the ticket you've just created and paste it in the WO as a private note and include your name**. This will ensure that if the EU calls in later to a different dispatcher. That dispatcher can view the most recent WO and see there is a Customer Concern Ticket

Customer Concern - *https://karlstechnology.freshdesk.com/a/tickets/######* - name

Dispatch will also be able to search the client's name in Freshdesk and the search should show the Complaint ticket.



Helpdesk will now review the EU's situation and determine if any reimbursement is in order.

KT3 Dispatch Tools and How to Use Them

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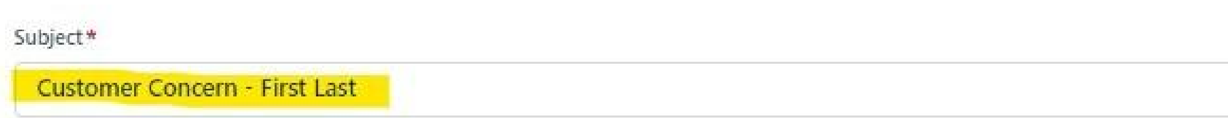
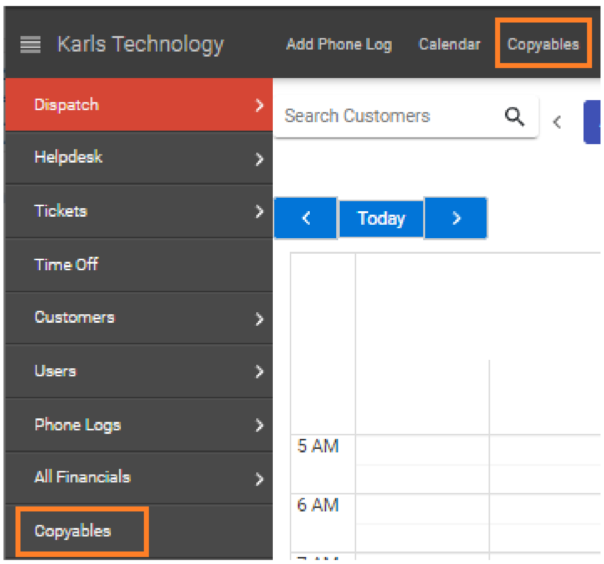


https://karlstechnology.freshdesk.com/a/solutions/articles/11000115835

Copyables

An available section in KT3 where we have pre-written messages for you to copy-paste and send to clients. You can access the Copyables section by clicking ‘Copyables'



Someone asking for a Job

- Sometimes we have individuals calling in looking to apply to our company. When we receive these calls, inform the individual to email in their contact information and resume to dispatch@karlstechnology.com
- Once we receive their email, we can forward the ticket to the Hiring Queue through an Executable Scenario in Freshdesk for the hiring manager(s) to review.

- Once the Email ticket has been moved to the Hiring Queue, ping @corey (Corey Northfield) and @Michael.Dairo and inform them we’ve received an applicant’s resume.

Commonly Used Terms at KTI

Field Engineer (FE)
Our onsite technicians.

End User (EU)
The person is the client and person who is using the device we are servicing.

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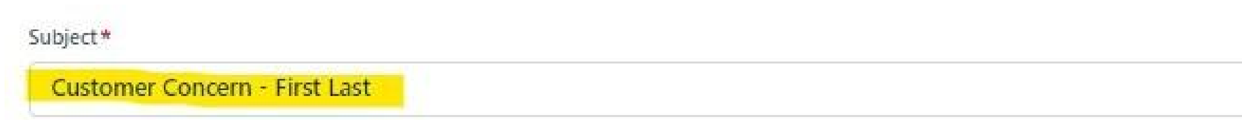

Work Order (WO)

A FreshDesk ticket created for a field engineer onsite or remote visit. Tickets usually have a seven-digit number associated with them.

Same Day Cancellation (SDC)

A cancellation of an appointment on the same day it is scheduled.

Same Day Service (SDS)

A customer attempting to get an appointment the same day as when they are calling in.

Voicemail (VM)

Personal voice messages using a phone.

Personal Computer (PC)

A computer designed for use by one person at a time.

Too Far Out (TFO)

We use this term to refer to potential bookings that are needing sooner availability or when we do not have an active Field Engineer in the client's metro.

Blue Screen of Death (BSOD)

An error screen that is displayed on Windows computer following a fatal system error.

End of Day (EOD)

We use this term when referring to the end of a field engineers day. Typically, it relates to the last appointment of the day for the field engineer.

Personal Protective Equipment (PPE)

Clothing and equipment that is worn or used in order to provide protection against hazardous substances or the environment. We use this term if the client requests that the field engineer wear PPE while onsite.

Karls Technology (KTI)

This is the company name.

RingCentral (RC)

The program we use to place and answer VoIP calls

Tawk.To

The program we use for live chat with clients

Billable

A billable service visit is one that we will charge the client for at our normal hourly rate. Follow-Up appointments are billable.

Non-Billable

A non-billable service visit is on that we will NOT charge the client for. Revisits are non-billable

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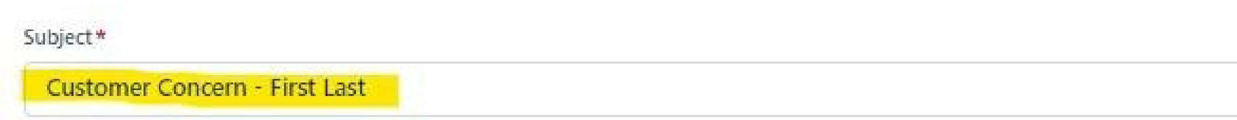

visits up to the amount of time the FE was on-site during the previous visit.

General Questions

Do the Field Engineers carry replacement hardware with them?

- No. We must send an Engineer out to source out compatible hardware replacements for a system prior to any installation.

Can a client source out their own hardware replacement and then have us out to install it?

- Yes. If a client feels comfortable enough sourcing out the replacement hardware themselves and only wants us out to install it, we can do that.
- However, we cannot guarantee the compatibility if the EU sources out their own hardware. We would still charge for the Engineer's TOS in the event that the replacement part is not correct.

This client with a follow-up appointment has been rescheduled multiple times due to the same FE calling out, can I schedule them with a different FE?

- Dispatchers are required to get confirmation from Helpdesk or a Manager prior to scheduling a follow-up appointment with any other FEs besides the original FE who ran the initial visit.

What certifications do our Field Engineers' have?

- CompTIA A+, Microsoft, and Field Engineer cert by Matt Karls (CEO)

Can we unlock Bitlocker?

- Unless the EU has the BitLocker code or access to the Microsoft account it's associated with, there's not much we can do besides factory reset the system. We can still send an Engineer out to assist them with setting them up to avoid this situation in the future.

Do Field Engineers start the clock when they arrive or when the client is there?

- Field Engineers start the bill the moment they get out of their car on-site.

Do Same-day bookings receive a same-day cancellation fee?

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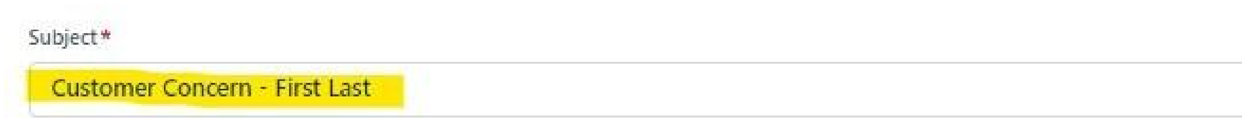

-Yes. New clients receive an SDC fee if they cancel the same-day as their appointment, even if they booked it the same-day.

- We need to be sure we properly inform clients that do schedule a same-day appointment about our cancellation policy. This is an example of how I like to inform clients, ***"Typically, we require 24 hours notice of any need to cancel or reschedule to avoid a cancellation fee. Since this is a same-day booking, you are waiving that option and if you cancel the appointment, there would be a fee associated with that. However, if you do need to cancel the appointment, if you reschedule the appointment, any cancellation fee is waived."***

- -

I mistakenly clicked on Reschedule and I need to move the appointment back. Where did it go?

- **Reschedule appointments are moved to Sunday between the 7-8pm window**. If you do not have the phone number available to quickly pull up the appointment, that is where you can find the ticket to move back onto the schedule.

- -

This client had 3 of the 4 points run during the 4-Point inspection, but waived the 4th. Can I still schedule a Revisit for this client?

- No. We cannot set up a complimentary Revisit for this client as they do not qualify. A Full 4-Point inspection is required for warranty, so we can only offer to set up a new billable service visit. If the client has an issue with that, we can contact the FE who ran the previous visit to discuss with the EU to determine if they approve setting up the Revisit.

- -

Client is calling in to pay their Carbonite Subscription?

- We do not handle Carbonite payments. Clients must go and pay for their subscription through Carbonite. We simply recommend the software for clients to use.

- -

If the EU threatens legal action?

- Politely let the EU know that due to the threat of legal action you are no longer able to continue the conversation and any further inquiries should be directed to our legal team and that you must now disconnect the call.

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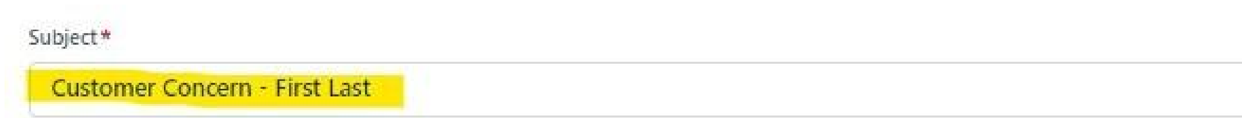

This client, who already has an outstanding SDC fee with us, just Same-day canceled on us again. Do we send them an additional SDC fee?

- Matt.Karls, *"Until they've paid us for a WO, they continue to be a new client. We've already sent people to collections for x2 and x3 invoices so any additional no-shows are just added to their existing bill.*

- Yes. New clients will receive additional SDC fees if they continue to No-show or same-day cancel on us.

The EU is calling in to verify previous employment at the company. Who handles this?

- Lucas.Chan handles these employment verifications. Forward the callers contact information to them or park the call if they're available. If there is a verification form as well, have it emailed to lucaschan@karlstechnology.com

---

The EU is calling in asking to speak with Matt, the owner.

- When an EU is calling in wanting to speak with Matt, these calls are most often Spam. However, we still inform the client to email their inquiry to us at dispatch@karlstechnology.com. If any legitimate inquiry comes through, we can send it up to Upper Management accordingly.
- However, if a client mentions that they are part of FFL Boss in ANY form: have them submit a ticket either in the FFL Boss app or on the website(s) fflboss.com / fflsoftwarepro.com for the quickest response.

Can clients change what card is charged in Square once the payment is processed?

- No. Once the payment is processed, we cannot adjust what card was charged. We can update the card for future payments however.

Are the Field Engineers Bonded or Insured?

- Yes, We're fully insured and bonded beyond what is required.

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Customer Concern - First Last

kc7txm 3 minutes ago

There's no Bonding requirements in any of the states we operate in for Computer Repair companies ... so it's a not applicable question -- bonded is a government enforced insurance policy - -- we're fully (and overly actually bc I don't trust a handful of FEs) insured, which is private / voluntary bond system ... so if you want to be super accurate, the answer is "no, there's no bond requirements or ability in your state" - if you want the TLDR version bc most ppl ask if you're "licensed & bonded" then it's yes, we're fully insured beyond what is required

kc7txm 3 minutes ago

The only states I believe bond computer repair businesses are CA, HI and NY ... three states we don't operate in

kc7txm 2 minutes ago

And if your followup is "do remotes count"? They do not

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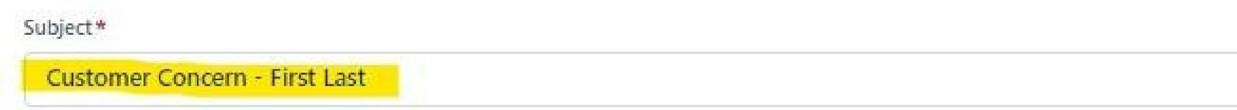

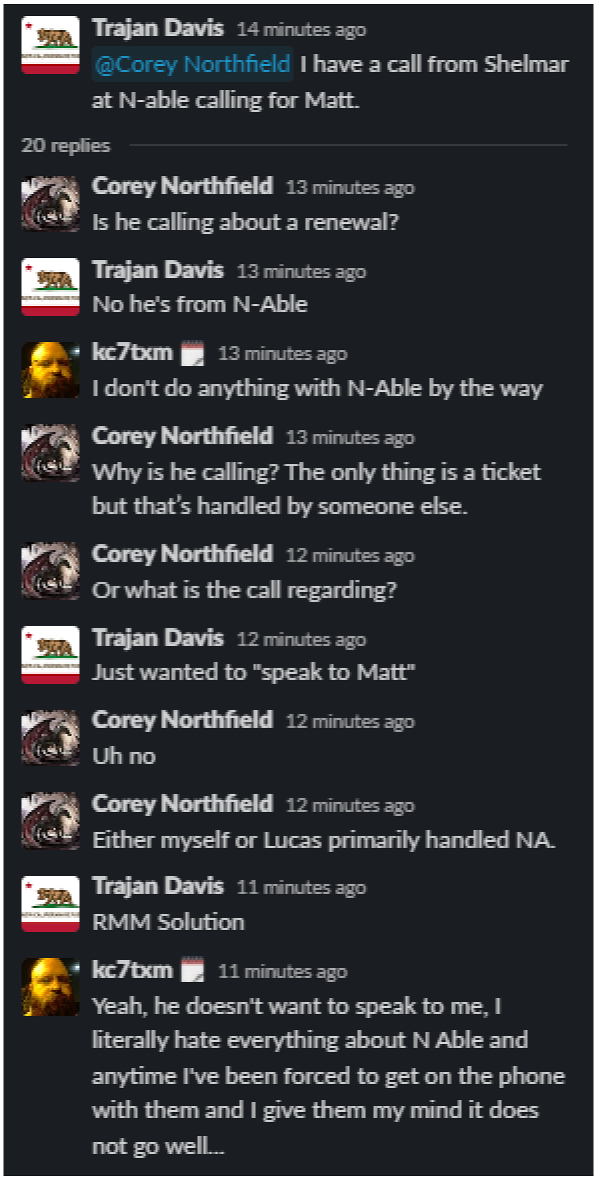

Trajan Davis 14 minutes ago
@Corey Northfield I have a call from Shelmar at N-able calling for Matt.

20 replies

Corey Northfield 13 minutes ago
Is he calling about a renewal?

Trajan Davis 13 minutes ago
No he's from N-Able

kc7txm 13 minutes ago
I don't do anything with N-Able by the way

Corey Northfield 13 minutes ago
Why is he calling? The only thing is a ticket but that's handled by someone else.

Corey Northfield 12 minutes ago
Or what is the call regarding?

Trajan Davis 12 minutes ago
Just wanted to "speak to Matt"

Corey Northfield 12 minutes ago
Uh no

Corey Northfield 12 minutes ago
Either myself or Lucas primarily handled NA.

Trajan Davis 11 minutes ago
RMM Solution

kc7txm 11 minutes ago
Yeah, he doesn't want to speak to me, I literally hate everything about N Able and anytime I've been forced to get on the phone with them and I give them my mind it does not go well...

N-Able Called in wanting to speak with Matt? = SPAM

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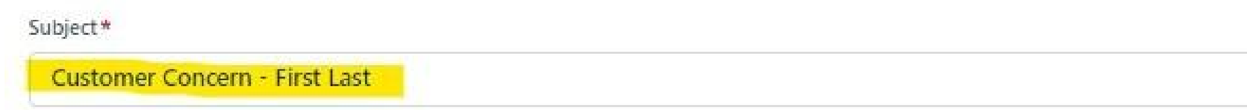

KT3 Clear Cookies/Cache To Resolve Slow Processing

Here are the steps you can take to make sure your KT3 is as responsive as possible:

Generally, just STEP 1 will improve the KT3 software's speed, but a FULL cache clear is necessary after new versions are released.

// WARNING // - Your Account Login credentials will be deleted, so make sure you have those saved somewhere before you clear everything out.

STEP 1:

A. In the top-right corner of your KT3, click on your name's drop-down menu

B. select **'Clear API Cache',** then Reload after the blue notification pops up.

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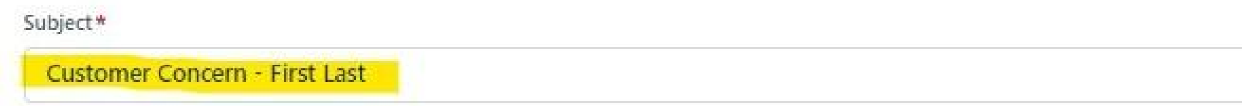

STEP 2:

A. Click on the icon just left of the app.karlstechnology.com URL

B. Click on '**Cookies and Site Data**'

C. Click **'Manage on-device site data'**

D. **Delete/Remove** the Cookies and then click 'Done'

STEP 3:

A. Click on the icon just left of the app.karlstechnology.com URL (again)

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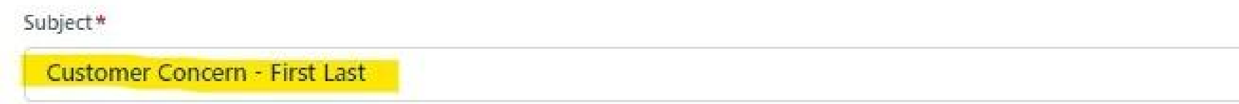

B. Navigate to ‘**Site settings**’.

C. Click **‘Delete/Clear Data’**

D. Click **‘Reset Permissions’**

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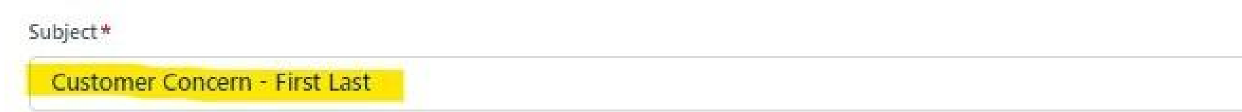
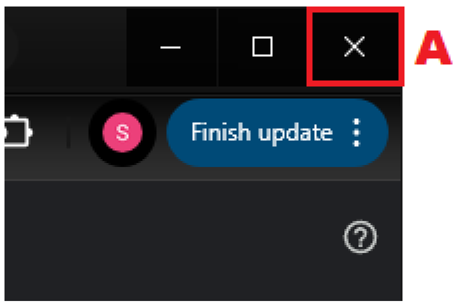


STEP 4:

A. Close out browser, reopen / relogin to app.karlstechnology.com

- there should now be no possible old cached versions of software within the local system



Subject*

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