

## **OPENING CHECKLIST**

LOG IN TO COMPUTER  
GET PAPERWORK FROM TECHNICIAN BOXES  
CHECK TIME CARDS TO SEE IF ANYONE WORKED LATE  
GO THRU QUEUE AND CLOSE OUT ANY REMAINING JOBS  
BOOK ANY JOBS THAT CAME IN OVERNIGHT  
SEPARATE PAPERWORK FROM DAY BEFORE  
VERIFY SCHEDULE FOR DAY AND MAKE SURE IT IS CORRECT IN  
SERVE MAN  
GO THRU SCHEDULE WITH EACH TECHNICIAN- I.E. MATERIAL OR  
EQUIPMENT NEEDED  
DISPATCH FIRST JOBS  
CALL ALL CUSTOMERS AND VERIFY TIME FRAME  
UPDATE EQUIPMENT LIST FOR DAY  
ENTER TIME CARDS INTO SERVE MAN  
DO REPORTS:  
    DAILY RUG SETTLEMENT  
    DAILY FLOOD SETTLEMENT  
    TECHNICIAN HOURS  
    DAILY TECHNICIAN SUMMARY

## **CLOSING CHECKLIST**

PULL YELLOW COPIES FOR NEXT DAY RUG DELIVERIES  
ENTER NEXT DAYS SCHEDULE INTO SERVE MAN AND MOVE OVER  
MAKE COPIES OF RUGS SETTLEMENT RECORDS FOR THAT DAY  
VERIFY ON CALL TECHNICIAN AND BACK-UPS  
MAKE SURE ANSWERING SERVICE HAS CALLED FOR ON-CALL INFO  
MAKE SURE ALL JOBS ARE DISPATCHED  
VERIFY ALL DOORS ARE LOCKED AND WATER IS OFF TO RUG PIT.  
SEPARATE ANY PAPERWORK ALREADY TURNED IN.  
WHEN LEAVING DO VISUAL INSPECTION OF VANS. I.E. CLEANED,  
PARKED

## **BOOK A FLOOD**

IN MAIN SCREEN  
ORDER ENTRY  
DEFLOOD  
ENTER ZIP CODE  
ENTER CUSTOMERS NAME  
TAB TO CUSTOMER  
ENTER CUSTOMER INFO IF NOT IN LOOK-UP, IF NAME  
APPEARS IN LOWER HALF OF SCREEN USE ALT+B TO  
HIGHLIGHT CUSTOMER INFO, ENTER TO SELECT  
Ctrl+ ENTER TO SAVE  
ESC OUT OF CUSTOMER HISTORY  
ENTER TYPE OF WORK (DEFLOOD, ORIENTAL RUG,  
INVENTORY PICKUP)  
SHORT DESCRIPTION, NO \$ AMOUNT  
ALT+P TO GET DOWN TO PRICING OPTION, ENTER  
ESC OUT OF CLUSTER BY ZONE  
ENTER DATE OF SERVICE  
TIME REQUESTED-SECTOR  
TAB TO METHOD OF PAYMENT  
ENTER AD SOURCE FROM DROP DOWN SCREEN  
ENTER ANY NOTES  
CTRL ENTER TO SAVE  
TAB TO RESTORATION-ENTER  
COMPLETE

## **CLOSE OUT MONITOR:**

HIGHLIGHT JOB

“C” FOR COMPLETE

REGULAR

“ARE WE CLOSING OUT A DOLLAR AMOUNT?”

TAB TO SAVE

“DID WE PICK UP ANY EQUIPMENT?”

IF YES HIGHLIGHT # AND HIT ENTER TO MOVE OVER TO  
TRUCK

TAB TO TRANSFER

ENTER IN DATE THAT WE ARE GOING OUT

TAB TO NOTES

NOTES: “MONITOR”, “DATE OF FLOOD”, “NAME OF TECH THAT  
DID FLOOD”, “TIME FRAME”, “ANY NOTES”, “READINGS”

CTRL + ENTER TO SAVE

## **CLOSE OUT RUG PICK UP**

HIGHLIGHT JOB

C FOR COMPLETE

RESCHEDULE

ENTER DATE ONE YEAR FROM PICK UP DATE

TAB TO NOTES

NOTES: TECH WHO PICKED UP, SIZE OF RUG, DOLLAR AMOUNT,  
EXTRAS

CTRL + ENTER TO SAVE

TAB TO RESCHEDULE

TEAR OFF RESCHEDULED TICKET FROM PRINTER AND ADD TO  
RUG PICK UP SETTLEMENT RECORD

## **CLOSE OUT RUG DELIVERY**

**“ALL RUG DELIVERIES ARE UNDER SHANE HOBBS IN QUEUE”**

HIGHLIGHT JOB

C FOR COMPLETE

REGULAR

VERIFY SUBTOTAL

ASK METHOD OF PAYMENT “ALWAYS MARK CHECK IN SERVE MAN”

TAB TO SAVE

HIT ESC

TAKE TICKET AND ADD TO RUG DELIVERY SETTLEMENT RECORD

## **CLOSE OUT A FLOOD**

HIGHLIGHT JOB

C FOR COMPLETE

ENTER DOLLAR AMOUNT

METHOD OF PAYMENT (MARK AS CHECK IN SERVE MAN)  
SAVE

ASK WHAT EQUIPMENT WAS DROPPED-HIGHLIGHT NUMBER  
AND HIT ENTER TO MOVE OVER TO JOB SITE

ONCE ALL EQUIPMENT HAS BEEN MOVED OVER TAB TO  
TRANSFER

ENTER DATE WE ARE GOING BACK

TAB TO NOTES

NOTES: “MONITOR”, “DATE OF FLOOD”, “NAME OF TECH THAT  
DID FLOOD”, “TIME FRAME”, “ANY NOTES”, “READINGS”

CTRL + ENTER TO SAVE

## **BOOKING PART 2**

*Helper*

HIGHLIGHT JOB

C FOR COMPLETE

REGULAR

TAB TO SAVE

ADD FAKE FAN TO JOB SITE (4001)

TRANSFER

ENTER TODAY DATE

NOTES: PART 2

CTRL + ENTER TO SAVE

SAVE

REASSIGN PART 2 TO TECHNICIAN GOING OUT TO HELP

HIGHLIGHT ORIGINAL FLOOD TICKET

C FOR COMPLETE

UNDO

## **RESCHEDULE TICKET FOR RUG DELIVERY**

IN MAIN SCREEN

DISPATCH

RESCHEDULE

ENTER DATE THAT WE ARE DELIVERING RUG

NOTES: "CALL IN AM W/ TIME FRAME", "ANY TIME FRAME  
DISCUSSED", "IF CUSTOMER ADDED ANYTHING IE REPAIRS,  
EXTRAS, SHOW \$ AMOUNT WE NEED TO ADD

DROP DOWN 2 LINES

"DELIVER # OF RUGS AND WHAT DATE WE PICKED UP"

*hi*  
817-825-4143

## **SERVE MAN KEYSTROKES SHORTCUTS**

ALT + F = FILTER IN QUEUE  
F= FIND + N = TECHNICIAN NAME  
ALT + L = LATE CALLS  
ALT + T = DAILY TOTALS  
K= ASSIGN TRUCK NUMBER  
ALT + A = ADD FAKE FAN  
D = DISPATCH  
A = ADD JOB  
G = REASSIGN JOB  
S = SHOW TICKET INFO  
M = SEND MESSAGE TO TECHNICIAN OR GROUP  
V = MARK ARRIVAL TIME  
E = MARK E.T.C.  
C= COMPLETE OR CLOSE OUT TICKET  
N = ADD NOTE TO JOB  
CTRL + P = SHOW PHONE NUMBER