STANDARD OPERATING PROCEDURE
Maintenance & Renovations

Standard Operating Procedure

Maintenance			
Owner		**Current version**	
Created by		**Date of creation**	
Approved by		**Last updated date**	

Document Version Management				
Date of update	**Updated by**	**Approved by**	**Version**	**Description**

Objective:

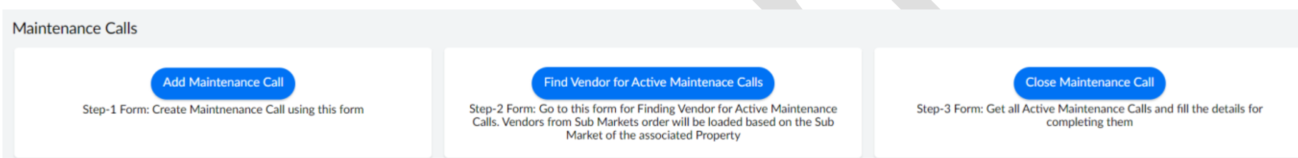
The objective of this SOP is to detail the procedures for handling maintenance and renovations.

Procedure:

To handle any maintenance and renovation tickets, follow the below three step process.

Go to "[Quick Links Main]" -> Maintenance Call Buttons

- Add Maintenance Call
- Find Vendor for Active Maintenance Calls
- Close Maintenance Call



Step 1: Add Maintenance Call

The objective of this step is to get all the diagnosis done within the first one hour from the time we received the request.

Process New Maintenance Call:

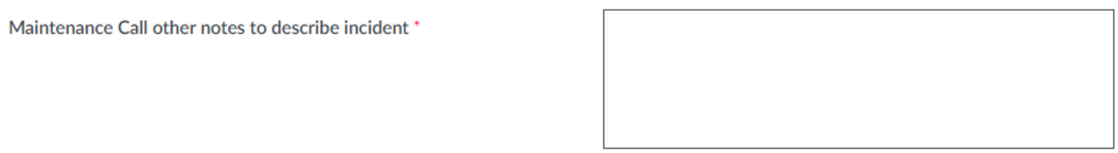
Fill all the following fields:

- Maintenance Call Name - Enter the problem details and address (example toilet leaking on 162 maint st e hampton). Acquire details more precisely with regards to what went wrong specifically to accurately describe it to the vendors or to post an advertisement in Thumbtack.

- Is this Emergency? – Select from the drop down list based on the emergency status as per the situation (Unknown, Yes, or No).

- Maintenance Call type of issue – Select from the drop down list based on the desired type of issue as per the damage/scenario explained by the Tenant.

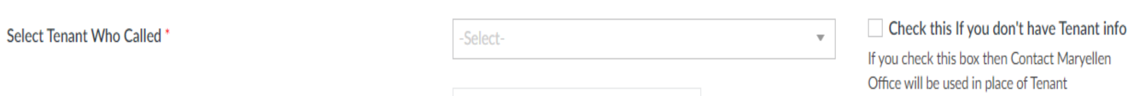
- Maintenance Call other notes to describe incident - Enter any other details about the issue as explained by the tenant or based on your exploration using the "Diagnosis Questions or trouble shooting & Pricing suggestions" sheet.



- Property - From the dropdown list, choose the exact property address.

- Select Tenant Who Called – Select from the drop down list the name of the tenant who raised the ticket. After selecting, click on "Click here to go to Tenant Record details in CRM" and quickly go through the maintenance history of the Tenant. For any appliance related reference, refer to the lease attachment. And any other relevant details listed on the left hand panel of the tenant record. This will help you to analyze more accurately based on the past events.

  Note: If you have not found the Tenant details in the drop down list, select the checkbox next to Check this If you don't have Tenant info.



- Tenant Phone field - Enter Tenant's Phone number

- Tenants Detailed Available Date and Time - Enter Tenants detailed available date and time for today, tomorrow, and following day and ask if they work from home. Always get a time window for weekdays and weekends. E.g., Today 8 AM to 10 PM, Tomorrow 9-4 PM. Day after tomorrow 8-4 PM. Work from home (yes/no). Confirm the contact number who will be at home to coordinate.

Tenants Detailed Available Date and Time

- Next Step to do on maintenance call - Based on the current situation and details available, enter what are the next steps to be taken.

Next Step to do on maintenance call

- Next Step Follow up date and Time - Select the desired date using the date picker.

Next Step Follow up date and Time | 07-Dec-2022 04:45:59

Note: Whenever we select this field, Zoho will pop up a reminder at the bottom of the screen at this date and time.

Reminders

No Activity Reminders found.

- Is this for maintenance or renovation/inspection - Select the desired category (inspection, maintenance, Remodeling/flip expense, or other)

is this for maintenance or renovation/inspection * | Maintenance

- Future Replacement Needed Notes – Based on the diagnosis and exploration with vendor, enter the specific notes if any future replacement needs to be done.

Future Replacement Needed Notes

- Vendor Category ex plumber, electrician* - Choose the category from the drop down list based on the problem and what type of vendor we need to assign to fix this problem.

Vendor Category ex plumber , electrician * | -Select-

- File relating to maintenance call – Add any relevant files to be attached in this field.

File relating to maintenance call | Select File

- Photo of the Problem – This is a MUST entry to get from the tenant explaining/showing the problem. Either get the pictures or short videos (1-2mins) of the problem and attach in this field.

  Note: Select checkbox next to "Check if we have photos of problem" if we have relevant pictures.

Photos of problem | Select Image

Will be added in the field "Photo of Problem (From Creator)"

☐ Check if we have photo of problem

- Date and Time of Call - Using the date picker, choose the exact date and time of the call received for this request.

Date and Time of Call * | 07-Dec-2022 02:45:59

- "Click here to check Diagnosis Questions Sheet" – As mentioned above, the main objective of step 1 is to diagnose the problem and gather all details of the issue. The diagnosis sheet will help you with probing questions, small steps to quick fixes and much more. Never skip this step before assigning a vendor as sometimes it's only a quick fix using the resolution mentioned on the diagnosis sheet. If a diagnosis type is not available, we must create it the same day with management assistance. If we don't have a specific diagnosis type, send an e-mail to Ops@ssgrealestate.com immediately.

Click here to check Diagnosis Questions Sheet

- STEP 1 Ends here.

NOTE: The below section is only for cases where it's a quick fix and we already have an assigned vendor who is already doing the job/can do the job within few hours based on our experience. Someone who we use on a regular basis so on such cases we don't need to go through the entire 2nd and 3rd steps. All such cases can be closed using the next section on Step 1 – "Vendor for Doing Maintenance Call".

Vendor for Doing Maintenance Call

Fill the following fields:

- Vendor Doing Job

Vendor Doing Job -Select-

- Vendor Phone

Vendor Phone +1 201-555-0123

- Vendor Detailed Available Date and Time

Vendor Detailed Available Date and Time

- Type of Vendor

Type of Vendor * -Select-

- Vendor Distance to House

Vendor Distance to House

- Estimated cost of Repair when don't have invoice

Estimated cost of Repair when dont have invoice

- Suggestions for Diagnostic

Suggestions for Diagnostic

- Scheduled Repair Date-Time

Scheduled Repair Date-Time

dd-MMM-yyyy HH:mm:ss

- Select the below checkboxes based on the applicability:
  - Check if we are using this vendor first time
  - Trouble finding vendor
  - Check if we are missing Approved Pricing
  - Check if we need to add it in order to call module
  - Check if we added Diagnostic questions
  - Check if we need to create Diagnosis questions

- [ ] Check if we are using this vendor first time
- [ ] Trouble finding vendor
- [ ] Check if we are missing Approved Pricing
- [ ] Check if we need to add it in order to call module
- [ ] Check if we added Diagnostic questions
- [ ] Check if we need to create Diagnosis questions

Section for Closing Maintenance Call:

Fill the following fields:

- Rate Vendor Experience

Rate Vendor Experience

- What was problem how was it fixed

- Cost of Fixed

Note: Only mark after you know cost after work done.

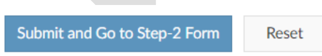
- Date Fixed in dd-MMM-yyyy format.

- Select “Check if we need to chargeback tenant” checkbox based on the applicability.

- Maintenance Status (Active, On Hold, Cancelled, Closed).

Reminder: Check if you have received the photo of the Problem for this Maintenance Call.

Select Submit and Go to step - 2 Form to move to the next step. After submitting, ask Tenant’s to check for a link on their phone to upload photo or video of their problem.



Note: Some fields will be auto-populated in step - 2 based on the previous data.

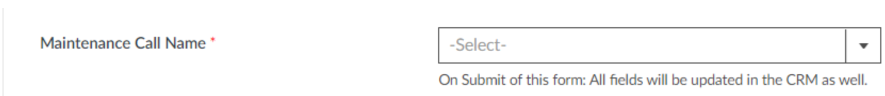
Step 2: Find Vendor for Active Maintenance Calls

The objective of Step 2 is –

- ➢ To get a vendor assigned for the job the same day, next day, or the next day after.
- ➢ To get actual/rough estimate (have it internally approved ME/VG/Avi) before starting the job.
- ➢ To coordinate the schedule between the tenant and the vendor to get it fixed within 3 days of the issue being raised.

Assign a Vendor to Maintenance Call

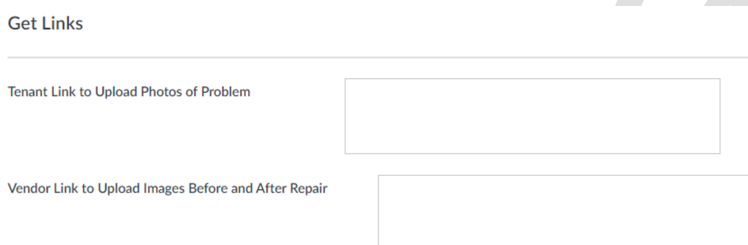
Select the “Maintenance Call Name” as shown below and it will auto-populate all the fields from the first section that were entered in Step 1.



Get Links Section

Get the below data:

- Tenant Link to Upload Photos of Problem (Before)
- Vendor Link to Upload Images After Repair (After)



Check Boxes: -

Select the following checkboxes based on the applicability:

- Trouble finding vendor – Tick the box if we struggled to find a vendor using load vendors
- Check if we need to add it in order to call module – Tick the box if we need to add to O2C
- Check if we need to create Diagnosis questions – Tick the box if the issue is not listed in Diagnosis sheet
- Check if we need to chargeback tenant – Tick the box if we need to chargeback the tenant based on the scenario
- Check if you added new vendors for future TFV – Tick the box if we added new vendors through Thumbtack or any other sources
- Check if you added vendor to accounting & connect – Tick the box once adding the vendor to Sage and ensure they are synced
- Check if we are using this vendor first time – Tick the box if it’s a first time vendor

- Check if we are missing Approved Pricing – Tick the box if we don't have price range in the sheet for this issue
- Check if you put thumbtack if TFV – Tick the box if we used Thumbtack to place an ad for this issue
- Check if we added Diagnostic questions – Tick the box is we added any new diagnostic questions
- Check if We added pricing to guide – Tick the box if we added the price to the pricing reference sheet
- Check if we rated vendor experience – Tick the box if we rated vendor experience

Check Boxes

- [ ] Trouble finding vendor
- [ ] Check if we need to add it in order to call module
- [ ] Check if we need to create Diagnosis questions
- [ ] Check if we need to chargeback tenant
- [ ] Check if you added new vendors for future TFV
- [ ] Check if you added vendor to accounting & connect
- [ ] Check if we are using this vendor first time
- [ ] Check if we are missing Approved Pricing
- [ ] Check if you put thumbtack if TFV
- [ ] Check if we added Diagnostic questions
- [ ] Check if We added pricing to guide
- [ ] check if we rated vendor experience

Job Pricing and Diagnosis Questions Link

Use the links below to compare Pricing and access the Diagnosis probing questions

- Click here to check Approved Prcing – Use this sheet to compare the estimates from vendors to understand if they are low, medium or wholesale. This will give us a better understanding of what can be the reasonable and affordable quote for a specific problem.
- Click here to check Diagnosis Questions Sheet - Use this sheet to troubleshoot the issue, find more details, explore quick fixes and deep dive into the details of the problem to narrow down to the fix and finalize what type of vendor to be assigned.

Job Pricing and Diagnosis Questions Link

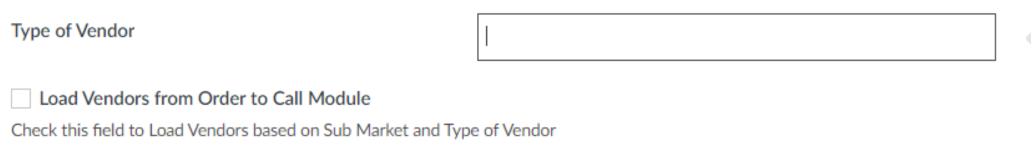
Click here to check Approved Prcing

Click here to check Diagnosis Questions Sheet

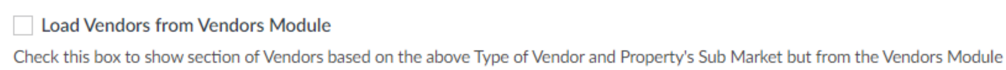
Section for Loading Vendors from Order to Call Module based on Sub Market and Type of Vendor

Follow the below steps in sequence to find the best suited vendor:

- Select the type of vendor and click the checkbox “Load Vendors from Order to Call Module”. This step will load the available list of vendors from “Order to Call” module based on the submarket of this property and the type of vendor. From this list, based on the “Notes for Team” and “Distance” start calling them one by one to get their availability and quotes.



- If you are unable to find a Vendor from above step, load other vendors from Section for Loading Vendors from Vendors Module based on Sub Market and Type of Vendor.



- If you are unable to find a Vendor from the above step, place a Thumbtack Ad; add the problem pictures received from the tenant, provide specific details with dimension (wherever required) and also the detailed analysis of the problem and request quotes from the responses.

  Insert video link for thumbtack process:

- If you are unable to find a Vendor from the above step, go to Vendor Map ; enter the property details in the search and wait for results to load within 50 miles. Filter the closest ones based on distance and start calling them to get their availability and quotes.

  Insert video link for Vendor Map search:

- If you are unable to find a Vendor from the above step, Use “Places Search” on the right hand panel -> it goes to google search and pulls results based on search keyword (roof repair) and the location.

  Insert video link for Places Search:

Vendor for Doing Job and details related to Vendor:

Once the vendor has been finalized using the above steps, fill in the below fields to proceed:

- Select Vendor for doing Maintenance – Enter Vendor Name

Select Vendor for doing Maintenance -Select-

- Vendor Phone – Enter vendor's phone number

Vendor Phone +1 201-555-0123

- Vendor Detailed Available Date and Time - Enter vendor's detailed available date and time for today, tomorrow, and following day. Always get a time window for weekdays and weekends. E.g., Today 8 AM to 10 PM, Tomorrow 9-4 PM. Day after tomorrow 8-4 PM. Confirm the contact number to coordinate.

Vendor Detailed Available Date and Time

- Scheduled Repair Date – Enter the Date & Time as agreed with the vendor

Scheduled Repair Date-Time dd-MMM-yyyy HH:mm:ss

Make sure you get the estimated cost while setting the appointment

- Rate Vendor Experience – Fill this at the end of task completion based on how neat and quick the job has been done, how easy was it to reach out to them, how affordable was the quote etc.

Rate Vendor Experience

- Estimated cost of Repair when don't have invoice – Enter the approx. cost of work

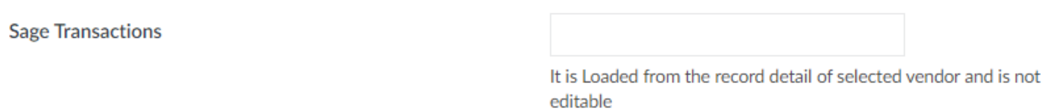
Estimated cost of Repair when dont have invoice

- Suggestions for Diagnostic – Enter in detail the steps done by the vendor to fix the issue. This is critical to refer for future scenarios.

- Vendor Notes For Team – Enter specific notes for the team about the vendor.

- Estimated Cost of Repair - Enter the approx. cost of work

- Sage Transactions – This will be auto populated, no need to enter manually.



- Jobs Completed - This will be auto populated, no need to enter manually.

- IS A PREFERRED VENDOR - This will be auto populated, no need to enter manually.

Section for Closing Maintenance Call:

Fill the following fields:

- What was problem how was it fixed – Enter notes on what the problem was and how was it fixed.

What was problem how was it fixed

- Date Fixed – Enter the date of repair.

Date Fixed dd-MMM-yyyy

- Cost of Fixed – Enter the actual cost of repair.

Cost of Fixed #,###,###.## $

- Maintenance Status – Select the final status of the ticket.

Maintenance Status -Select-

Ensure the reminders are followed for each and every ticket.

Reminders:

- *Remind Selected Tenants that they will receive SMS/Email with a link to upload photos of the problem.*
- *Did you remember to diagnose or troubleshoot this problem? If diagnosis is missing you need to add it.*
- *Did you get the problem detail in field "Maintenance Call Other Notes to describe the incident" for problem detail so that vendors should understand.*
- *Did you get photo from tenant.*
- *Did you get estimated cost of repair from the Vendor?*
- *Did you remind the vendor that we need the photo before and after repair?*

Select Submit and Go to Step – 3 Form

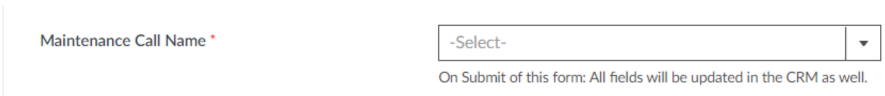
Submit and Go to Step-3 Form

Note: Some fields will be auto-populated in step -3 based on the previous data.

Step 3: Close Maintenance Call

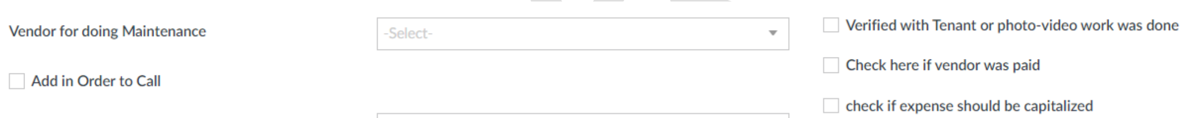
The objective is to ensure all the relevant fields are entered accurately in order to use them as a reference for the future.

Select the “Maintenance Call Name” as shown below and it will auto-populate all the fields from the first section that were entered in Step 1 & Step 2.



Fill the following details:

- Vendor for doing Maintenance – Select the vendor
- Select the below checkboxes based on the applicability:
    - Add in Order to Call
    - Verified with Tenant or photo-video work was done
    - Check here if vendor was paid
    - Check if expense should be capitalized



- Rate Vendor Experience – Rate the vendor based on how neat and quick the job has been done, how easy it was to reach out to them, how affordable was the quote etc.

- Suggested Job Price

Some of the below fields are auto-populated from details entered in Step 1 & Step 2. Enter the ones that are not filled in.

- Suggestions for Diagnostic
- Cost of Fixed
- Date Fixed
- Maintenance Status
- What was problem how was it fixed
- Notary – Type of issue

Notary | -Select-

Select Submit button to close a ticket

Submit

In Progress – Videos to be trimmed and updated under specific topics

https://screenrec.com/share/VTmXwprsni

https://screenrec.com/share/PdarlmRLQk

https://screenrec.com/share/ryTkxIG7Y8

https://screenrec.com/share/SL3ejwFDpC

Heating issues - checkpoints

https://screenrec.com/share/XVWD4TevKI

Hover image to zoom

Mandatory fields that should be filled in:

When on call with the Tenant, know the problem, try to fix the issue with the help of diagnosis sheet, if it is not successful, and open a maintenance call ticket.

To open a ticket, clearly know the problem using diagnosis sheet.
Maintenance Call Name – State the issue followed by the property name. Example: Heat issue 8106 Martha Washington St, Alexandria, VA 22309.
Vendor Category ex plumber, electrician field - select the exact vendor category from the list of options available.
Get the photos of the problem. Send the URL available in Tenant Link to Upload Photos or Videos to the tenant and ask them to upload the photos or short video of the problem.

Once you receive the photos, select checkbox next to "Check if we have photo of problem".
Know the tenant's availability. Ask them the specific day and time of availability. (For example, 10 Jan 10 AM to 6 PM).

Maintenance Call type of issue – Choose the exact issue from the list of options available.
Maintenance Call other notes to describe incident – Describe if there is any additional notes that will help to resolve the issue quickly.

Loading Vendor:

Find the best vendor based on their distance to tenant's house, price, reviews, and ratings. If you are unable to find the vendor, select the checkbox next to Trouble finding vendor.

Based on the above information, fill in the below fields:
Vendor Doing Job
Vendor Distance to House
Vendor Detailed Available Date and Time - Should be specific with day and time. For example, (10 Jan 10AM-6PM).
Estimated cost of Repair when dont have invoice
Scheduled Repaired Date & Time

Maintenance Call Work Order Progress – choose the exact status from the options available in the list. Example: Vendor Assigned.

Based on the scheduled repair date, update the Next Step Follow up date and Time

On the Next Step Follow up date, check the following fields:

- Manager comments
- Next Step to do on maint call

Act accordingly based on the above fields

After taking necessary actions, update the same on the “Next Step to do on maint call” field and also change the “Next Step Follow up date and Time”. If there is a change in the status, update the “Maintenance Call Work Order Progress”.

Note: Ensure to update all the mandatory fields based on the situation.

Once the requested work has been completed:

Get the completed work photos from the vendor and update “After Repair Photos of Problem” field.
Date of Fixed
Cost of Fixed
What was problem how it was fixed?
Invoice

Close the ticket.
Change the status of maintenance to “Inactive”
Update “Maintenance Call Work Order Progress” to “Work Completed”.