



Best Buy Appliance Services *Service Provider Guide*

Revised: 10 Oct 2014

The most current version of this document can be found under "Manuals" on the DOLI home page.

CONFIDENTIAL NOTICE

This Manual and all of its contents comprise strictly confidential and proprietary information of INSTALLS inc, LLC. You may not disclose any of the information to a third party, and may use the information only for the purpose of performing services for INSTALLS inc, LLC.

COPYRIGHT NOTICE

Copyright © 2014 INSTALLS inc, LLC. All rights reserved. This Manual may not be copied, transferred, reproduced, or duplicated without the prior written consent of INSTALLS inc, LLC. The Manual and all of its contents are proprietary information of INSTALLS inc, LLC and are protected by the Copyright laws of the United States and International Treaties.

Table of Contents

Service Provider Dress Guidelines for Best Buy Work	3
Requirements	3
Not Acceptable	4
Ordering Additional Parts	5
Setting the Appointment Window for Best Buy Appliance Services	6
NPS and Best Buy Appliance Work	8
Service Provider Processes for Best Buy Appliance Services	9
Contacting Installs	9
Permits.....	9
Appointment.....	9
<i>40-Minute Call Ahead</i>	9
<i>Customer Not Home Policy</i>	9
Installation.....	9
<i>Inspecting the Site and Equipment</i>	9
<i>Wrong, Damaged, or Defective Equipment; Missing Parts; Equipment Not Delivered</i>	10
<i>Upsells</i>	10
<i>Additional Plumbing Needed</i>	10
<i>Product Does Not Fit</i>	11
Haul-Away	11
Completing Paperwork	11
<i>Installs Installation Workorder</i>	11
<i>Installation Control Form</i>	11
<i>Installs Recycling Program Form</i>	12
Closing the Job in DOLI.....	13
Submitting Paperwork for Payment	14
<i>Uploading Paperwork to DOLI</i>	14
<i>Emailing Paperwork to Installs</i>	15
<i>Faxing Paperwork to Installs</i>	15

SERVICE PROVIDER DRESS GUIDELINES FOR BEST BUY WORK

Requirements

Large companies like Best Buy invest a great deal of effort and financial resources to build and maintain a brand that consumers trust. When you accept Best Buy work from Installs, you also accept the responsibility of representing the Best Buy brand appropriately.

Best Buy is serious about the appearance of service providers who perform their work. One of the most common reasons for Best Buy escalations to Installs is service providers arriving in store or onsite with an unprofessional appearance. **All Installs Best Buy Service Providers are required to follow the dress guidelines outlined below.**

GENERAL APPEARANCE:

Professional appearance, style, and hygiene

Keep hair neat, clean, and conservatively styled; keep facial hair trimmed and neat in appearance

HATS:

No hats

SHIRTS:

Clean, appropriately sized collared polo shirt with no logo or Installs logo

PANTS:

Clean and appropriately sized slacks or khaki pants; no jeans

SHOES:

Closed toe work shoes or boots appropriate for job site
Use shoe covers while inside customer's home

COLD WEATHER:

Service Providers may wear clean white or blue long-sleeved shirts with no tears under their collared shirts

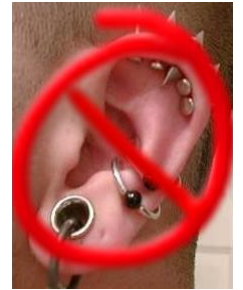
Service Providers may wear clean jackets, parkas, or winter coats with no logos, no sports team affiliations, and no tears



Not Acceptable

The following items are unprofessional and may pose safety hazards. These items are not allowed at any time on any Installs job; do not wear these items to client locations or job sites.

- “Hoodie” sweat shirts
- T-shirts
- Jeans
- Shorts
- Torn clothing
- Baggy or low rise pants
- No visible pierced body jewelry (including tongue, nose, and eyebrow), excessively pierced ear jewelry, or jewelry that presents a safety hazard
- Tattoos that may be considered offensive (violent or sexually explicit images, profanity) must be covered



Remember, the way you present yourself reflects on Best Buy. If the client is unhappy with the way you represent their brand, they can ask Installs to remove you from your primary position on their store. Complying with the client’s dress guidelines is an easy way to avoid escalations, and maintain your store primary position.

Ordering Additional Parts

Installs' preferred supplier for appliance and electronics parts is Petra Industries. Petra is the nation's top distributor of consumer electronics, custom installation, mobile audio/video, and appliance connection supplies.

As an Installs technician, you can order parts directly from Petra. Installs recommends and encourages you to take advantage of the volume pricing offered to our network partners to stock your supply of parts. To do so, you must complete the [Petra Credit Card Authorization Form](#), available on your DOLI homepage, and fax it to Petra. Once your account is set up, you can phone, fax, or email orders to Jay Wehba, the Installs account representative at Petra. You will receive free shipping for orders over \$500, and, since Petra is centrally located in Oklahoma, you will benefit from 3-day maximum shipping to either coast.

The blank Petra PO Form, also available for download on your DOLI homepage, lists only appliance parts, but you may use the form to order other items from Petra, as well. The complete, current list of Petra parts is available on your DOLI homepage.

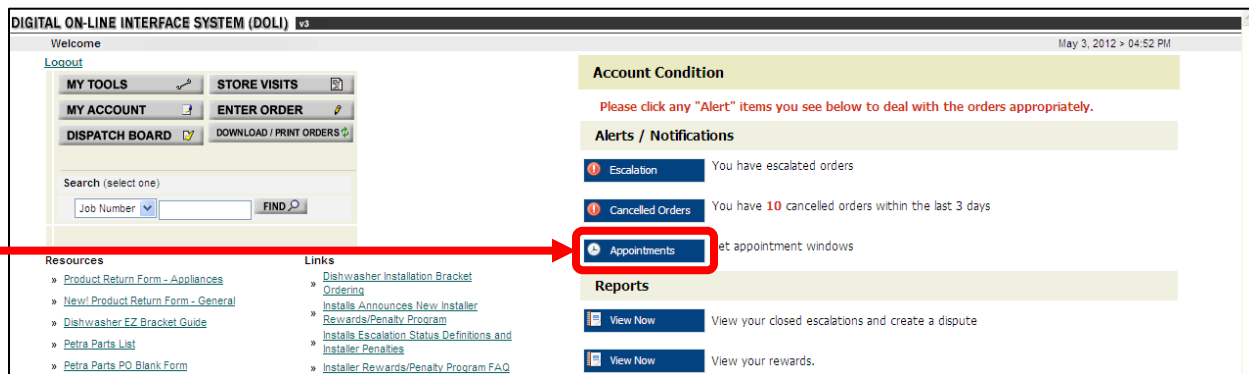
Please contact Jay Wehba at Petra with questions about parts or the ordering process:

Jay Wehba
PETRA INDUSTRIES
2101 S. Kelly
Edmond, OK 73013
Ph: 866-604-7286
Fax: 866-604-7285
jwehba@petra.com

SETTING THE APPOINTMENT WINDOW FOR BEST BUY APPLIANCE SERVICES

Setting appointment windows is a two-step process. The first step is to contact the customer between 3:00pm and 9:00pm local time the night before the scheduled date to set the four-hour appointment window. This is important because it lets the customer know when they should expect you. The second step is to enter the arrival window in DOLI by 8:00am the day of the installation. This step is also essential because it enables Installs to update the customer if they call us to request an arrival ETA. Setting appointment windows can also help you organize your servicers and routes.

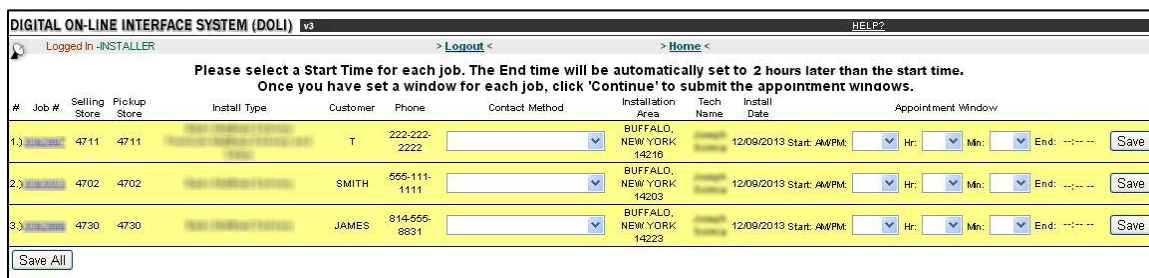
1. After dispatch time (approximately 3:00pm local time), log in to your DOLI Installer account.
2. On your DOLI homepage, click the blue **Set Appointment Windows** button.



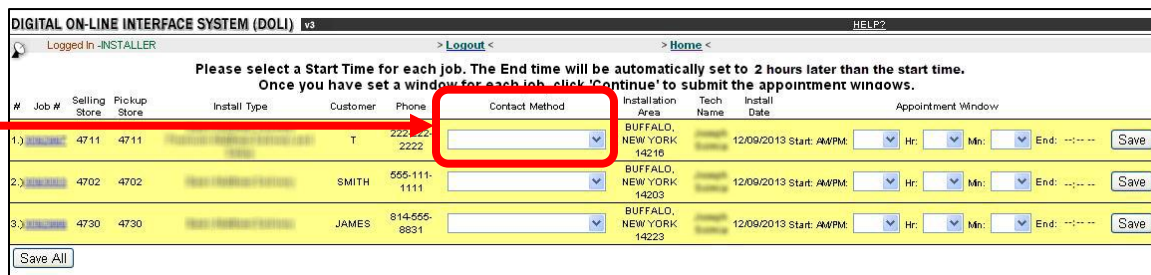
Note: If you do not see the blue **Set Appointment Windows** button, one or a combination of the following factors apply:

- You currently have no appliance jobs scheduled for tomorrow
- You currently have no appliance jobs for tomorrow with a status of **Scheduled – Dispatched** or **Scheduled – Accepted**
- Appliance orders scheduled for tomorrow have not yet dispatched

Note: Clicking the **Appointments** button displays your appliance jobs for tomorrow that are currently in **Scheduled – Dispatched** or **Scheduled – Accepted** status.



3. Contact each customer between 3:00pm and 9:00pm local time to set up a four-hour arrival window that fits both the customer's schedule and yours.
4. From the **Contact Method** drop-down list, select the method of communication you used to contact the customer to set the arrival window for the job.



- Select **Spoke with Customer** if you discussed the arrival window with the customer over the phone.

- Select **Left Message** if you left a voice message for the customer detailing the arrival window.
- Select **Customer Unreachable** if you were not able to reach the customer by phone or you were not able to leave a voice message for the customer.

5. From the **Appointment Window Start** fields for each job order, select the start time for the installation arrival window you agreed on with the customer.

DIGITAL ON-LINE INTERFACE SYSTEM (DOLI) v3

Logged In -INSTALLER

Please select a Start Time for each job. The End time will be automatically set to 2 hours later than the start time. Once you have set a window for each job, click 'Continue' to submit the appointment windows.

#	Job #	Selling Store	Pickup Store	Install Type	Customer	Phone	Contact Method	Installation Area	Tech Name	Install Date	Appointment Window
1.)	4711	4711			T	222-222-2222		BUFFALO, NEW YORK 14216		12/09/2013	Start: AM/PM: [dropdown] Hr: [dropdown] Min: [dropdown] End: [dropdown] [Save]
2.)	4702	4702			SMITH	555-111-1111		BUFFALO, NEW YORK 14203		12/09/2013	Start: AM/PM: [dropdown] Hr: [dropdown] Min: [dropdown] End: [dropdown] [Save]
3.)	4730	4730			JAMES	814-555-8831		BUFFALO, NEW YORK 14223		12/09/2013	Start: AM/PM: [dropdown] Hr: [dropdown] Min: [dropdown] End: [dropdown] [Save]

[Save All]

- From the first drop-down, select **AM** or **PM**.
- From the second drop-down, select the hour for the start time.
Note: Only business hours are displayed. If you selected **AM** from the first drop-down, you will see only morning business hours; if you selected **PM**, you will see only afternoon/evening business hours.
- From the third drop-down, select the minutes.
Note: You may select minutes for the start time in 15 minute increments. DOLI automatically calculates the four-hour window based on the start time you set and displays the **End** time.

6. If you need to set appointment windows on other jobs, perform the following steps:

- Repeat the steps above for all desired orders.
- Once you have set all arrival window start times, click the **Save All** button.

DIGITAL ON-LINE INTERFACE SYSTEM (DOLI) v3

Logged In -INSTALLER

Please select a Start Time for each job. The End time will be automatically set to 2 hours later than the start time. Once you have set a window for each job, click 'Continue' to submit the appointment windows.

#	Job #	Selling Store	Pickup Store	Install Type	Customer	Phone	Contact Method	Installation Area	Tech Name	Install Date	Appointment Window
1.)	4711	4711			T	222-222-2222		BUFFALO, NEW YORK 14216		12/09/2013	Start: AM/PM: [dropdown] Hr: [dropdown] Min: [dropdown] End: [dropdown] [Save]
2.)	4702	4702			SMITH	555-111-1111		BUFFALO, NEW YORK 14203		12/09/2013	Start: AM/PM: [dropdown] Hr: [dropdown] Min: [dropdown] End: [dropdown] [Save]
3.)	4730	4730			JAMES	814-555-8831		BUFFALO, NEW YORK 14223		12/09/2013	Start: AM/PM: [dropdown] Hr: [dropdown] Min: [dropdown] End: [dropdown] [Save]

[Save All]

Note: This displays the confirmation message, "Appointment Windows Updated. Please Notify Customers," at the top of the screen.

7. If this is the only job that requires and appointment window, click the **Save** button corresponding to the job.

DIGITAL ON-LINE INTERFACE SYSTEM (DOLI) v3

Logged In -INSTALLER

Please select a Start Time for each job. The End time will be automatically set to 2 hours later than the start time. Once you have set a window for each job, click 'Continue' to submit the appointment windows.

#	Job #	Selling Store	Pickup Store	Install Type	Customer	Phone	Contact Method	Installation Area	Tech Name	Install Date	Appointment Window
1.)	4711	4711			T	222-222-2222		BUFFALO, NEW YORK 14216		12/09/2013	Start: AM/PM: [dropdown] Hr: [dropdown] Min: [dropdown] End: [dropdown] [Save]
2.)	4702	4702			SMITH	555-111-1111		BUFFALO, NEW YORK 14203		12/09/2013	Start: AM/PM: [dropdown] Hr: [dropdown] Min: [dropdown] End: [dropdown] [Save]
3.)	4730	4730			JAMES	814-555-8831		BUFFALO, NEW YORK 14223		12/09/2013	Start: AM/PM: [dropdown] Hr: [dropdown] Min: [dropdown] End: [dropdown] [Save]

[Save All]

Note: This displays a **Y** to the right of the **Save** button on the job, indicating that the start time has been set.

8. On the day of the job, call the customer on the order 40 minutes before your arrival to confirm your ETA.

NPS AND BEST BUY APPLIANCE WORK

Net Promoter Score (NPS) is a metric used to gauge customer satisfaction. When you finish a Best Buy appliance job, Best Buy contacts the customer with a survey asking for feedback on their experience. The way to get a good NPS score is to make sure the customer is happy with their service.

Your NPS goal on Best Buy appliance jobs is to provide the highest quality service so that each customer will want to recommend Best Buy appliance installation to others. There are simple customer service steps you can take on every job to deliver installation services that customers will want to rave about to their friends, colleagues, and/or family members:

- Before you begin the service, talk with the customer to **explain the work you are going to do**. This helps you set expectations and gives the customer a chance to ask questions about the installation.
- **Inspect the equipment and installation site** before beginning the installation to identify any issues before you start.
- **Use floor coverings and maintain a neat work area**. Cleaning up as you go shows the customer that you are organized and that you are taking care to with their home, space, and possessions.
- **Run a test cycle** to identify and address any problems. This simple yet crucial step can help you identify and correct a leak or missed connection.
- After installation, **demonstrate the functions of the product** to the customer. Also give all manuals, warranty cards, and other paperwork to the customer.
- Before packing up, let the customer know that their satisfaction is important to you, and **ask if there is anything else you can do to meet or exceed their expectations**.

As you are preparing to leave, let the customer know that they will receive a survey about the service. To encourage the customer to respond, you can say, *“You will be contacted with a survey about today’s appliance installation. We would appreciate it if you could take a couple minutes to complete the survey.”* When more customers respond to the survey, we get a more accurate view of what customers expect from their service, and how we can best meet their needs.

The [Improving Your NPS](#) document on your DOLI homepage outlines the problems customers most frequently report on NPS surveys, as well as recommendations for avoiding the problems.

SERVICE PROVIDER PROCESSES FOR BEST BUY APPLIANCE SERVICES

Contacting Installs

If you have any questions or issues related to Best Buy appliance jobs, contact Installs at 1-888-490-4321, option 1.

Permits

If a permit is required to perform the installation type in your area, obtain the permit before rolling on the job. Once onsite, collect payment for the permit directly from the customer and document the permit **Type**, **Approval Number**, and **Fee** in the **Permit Information** section on the *Installation Control Form*.

Appointment

40-Minute Call Ahead

On the day of the job, call the customer on the order 40 minutes before your arrival to confirm your ETA.

Customer Not Home Policy

If you arrive at the customer's location and they do not respond to your attempts to make contact, wait 15 minutes; call all available numbers for the customer on the *Installs Installation Workorder*. If you make successful contact with the customer, work with them to determine if the service can be completed as scheduled. If rescheduling is required, call Installs at 1-888-490-4321, option 1, so we can assist with the rescheduling and DOLI updates.

If you do not reach the customer, call Installs at 1-888-490-4321, option 1, from onsite. The Installs agent will advise you on next steps.

Installation

Inspecting the Site and Equipment

Inspect the installation site with the customer **before** beginning the installation. Document any pre-existing damage on the **Damages** section of the *Installation Control Form* that prints with the job paperwork. Obtain the customer's initials next to your notations about pre-existing damage, indicating that the customer agrees that there is pre-existing damage at the installation site.

Also inspect the equipment onsite with the customer before beginning the installation. Ensure that customer agrees that there is no damage.

Inspect the equipment a final time with the customer upon completion of the installation. Obtain the customer's signature on all paperwork indicating that the work was completed.

Wrong, Damaged, or Defective Equipment; Missing Parts; Equipment Not Delivered

If there is a problem with an order or the equipment for a Best Buy Appliances job, it is important to maintain a professional attitude with the customer. We realize that it can be frustrating to find issues once you are already onsite, but you should never express your frustrations about Best Buy, Installs, the manufacturer, or the product to the customer. Below we have outlined some issues that come up on appliance jobs, as well as ways to handle each situation.

As you are unboxing product for a customer's Best Buy appliance installation, check it thoroughly to ensure that there is no damage and that it is the correct unit.

- If the wrong product was delivered or there are missing parts, notify the customer that the equipment is incorrect/incomplete. Call Installs at 1-888-490-4321, option 1 from onsite to report the issue. Installs will work with the store to have the issue corrected. The customer's installation will be rescheduled when the replacement equipment is available.
- If you find that the equipment is damaged/defective, show the product to the customer.
 - If the customer wants to keep the product, document the issue in detail in the "Damages – Before Installation" section of the Installation Control Form (both copies) and have the customer initial where indicated (both copies) and proceed with the installation. Call Installs at 1-888-490-4321, option 1 from onsite to report the damage and notify Installs that the customer has agreed to keep the unit.
 - If the customer does not want to keep the damaged/incorrect unit, document the issue in detail in the "Damages – Before Installation" section of the Installation Control Form (both copies), and then call Installs at 1-888-490-4321, option 1 from onsite to report the issue. Installs will work with the store to have the issue corrected. The customer's installation will be rescheduled when the replacement equipment is available.
- If you arrive onsite to discover that the equipment has not been delivered yet, call Installs at 1-888-490-4321, option 1, from onsite to report the missing equipment.

Upsells

The standard Installs upsell process applies to Best Buy jobs:

1. If a customer requests or expects you to complete work that falls outside of the provided Scope of Work, or if parts are needed that were not provided or sold to the customer by Best Buy, call Installs at 1-888-490-4321, option 1, option 1 for direction.
2. Notate any approved upsells on the *Installation Control Form*, which you will submit to Installs when you close out the job.

Additional Plumbing Needed

If the customer's site needs additional plumbing work in order to complete the installation (e.g., for dishwashers) and you have the appropriate skills and tools to do the work to code, you can offer to perform the necessary plumbing services for the customer for an additional charge. **BEFORE beginning any additional plumbing, you MUST:**

- Provide the customer the full amount you will charge them for parts and labor.
- Get the customer's agreement to pay for the additional plumbing work.
- Document the details of the required plumbing work in the "Additional Work/Parts" section of the Installation Control Form (both copies), and get the customer's signature and date where indicated (both copies).

For dishwasher installations, carefully inspect the shut-off valve before beginning the installation. If the shut-off appears to be in bad condition, discuss the issue with the customer. If you can replace the shut-off valve, you can offer to do so following the required steps above, or advise the customer to have the work done by a plumber. **NEVER connect to a bad shut-off – if you do, you will be responsible for any resulting damage.** Always run a test cycle to ensure fittings and connections are secure and there are no leaks.

Product Does Not Fit

If the customer's delivered product does not fit the space in which it is supposed to be installed, explain the issue to the customer and outline the available options (e.g., purchase a smaller unit, explain the work that would need to be done for the unit to fit, etc.). Call Installs at 1-888-490-4321, option 1 from onsite to report the issue and notify Installs about what the customer wants to do (e.g., return the unit, delay the installation while they have other work done, etc.).

If you experience an issue onsite that you are not sure how to handle, Installs at 1-888-490-4321, option 1 from onsite for assistance.

Haul-Away

If you remove a product from the job site for recycling, you must complete the *Installs Recycling Program Form* that prints with the job paperwork. Include the completed *Installs Recycling Program Form* with the paperwork you submit to Installs when you close out the job.

Return the removed item to the pick-up location. All products removed from Best Buy jobs are property of Best Buy and should be treated with the utmost care. Do not take Best Buy product to recycling centers; all products hauled away from Best Buy jobs for return or recycling must be taken back to the Best Buy pick-up location.

Completing Paperwork

All installation job related paperwork must be properly completed, signed/initialed, and submitted to Installs in order to receive payment. At the end of the job, take all completed paperwork with you for submission to Installs.

Installs Installation Workorder

- Get the customer's signature, date, and printed name where indicated at the bottom of the form.

Installation Control Form

Note: Two copies of the *Installation Control Form* will print with each workorder. Complete both copies; leave one completed copy with the customer and submit the second completed copy to Installs.

Permit Information section

- Complete all applicable permit information

Install Site Inspection section

- Before beginning the installation, notate any pre-existing damage found at the installation site.
- Get the customer's initials on any pre-existing damage noted.
- After the installation is complete, notate any damage caused during the installation process.
- Get the customer's initials on any installation related damage noted.

Additional Work/Parts section

- If the customer has agreed to additional work or parts, as approved by your call to Installs, document the charges and explanation in this section.
- Get the customer's signature and date where indicated.

Recycling section

- Complete this section, indicating whether the customer wants their old appliance hauled away for recycling.

Note: If **Yes**, also complete the *Installs Recycling Program Form*.

Anti-Tip Bracket section

- Get the customer's initials in the appropriate space, based on whether they want the installation of the anti-tip bracket.

Sign-Off

- Get the customer's signature and date where indicated.
- Enter your signature and date where indicated.

Installs Recycling Program Form

Note: If you remove old equipment from the customer's site for recycling, be sure the **Recycle** section on the *Installation Control Form* is properly completed.

Equipment Information section

- Enter the make, model, and serial number of each item you are hauling away.
- Get the customer's signature, date, and printed name.

Tech/Store Sign-off section

- Enter your signature and the date you dropped the old equipment off for recycling.
- Get the Best Buy store location, permit number, signature, city, and state from the Best Buy associate.

Closing the Job in DOLI

Note: Best Buy appliance jobs must be closed out in DOLI the **SAME DAY** the service is completed. Closing out the order in DOLI lets Installs and Best Buy know that the job has been completed. It also helps you avoid a follow-up call from Installs reminding you to close your open orders. Additionally, closing out jobs is one of the necessary steps you must take to get paid, because Installs is not able to pay you on an order that is still open in DOLI.

1. Locate the desired order in DOLI.
2. From the **Change Status** drop-down list, select **Completed**.

Note: The status comment displays **Complete per SOW**.

The screenshot shows a web form for changing the status of an order. At the top, there is a 'Change Status:' dropdown menu with 'Completed' selected. Below this, there are two lines of red text: 'The Scheduled status is not available here. In order to schedule this job, please use Appointment Info' and 'The cancelled status is not available. In order to cancel a job, please contact INSTALLS inc.' Below the red text is a 'Comment:' field with 'Complete per SOW' entered, and a 'Completion date:' field with '06', '04', and '2013' selected. Below the comment field is a text area for 'Add / Edit Notes : (Notes entered here will not appear on the printed workorder.)'. At the bottom left is an 'Account #' field, and at the bottom right is a 'SUBMIT ✓' button. Two red arrows point to the 'Change Status' dropdown and the 'Comment' field.

3. From the **Completion Date** drop-down lists, select the month, date, and year you are closing out the order.

Note: Best Buy appliance jobs must be closed out in DOLI the **SAME DAY** the service is completed.

4. Enter any comments related to the order closeout in the **Add/Edit Notes** field.

Note: Installs has a liberal viewing policy regarding work order notes and history. Installs clients, their management, and Installs personnel have access to read the comments you enter. Data integrity is important; all comments should be documented in a complete and professional manner.

5. Click the **SUBMIT** button to save the status change and notes.

Note: This closes the job.

Note: You can also use Installs' DOLI Mobile App for Android or iPhone, which offers many functions, including job close-out, right in the palm of your hand! See the [Installers_DOLI Mobile Android & iOS App](#) guide on your DOLI homepage.

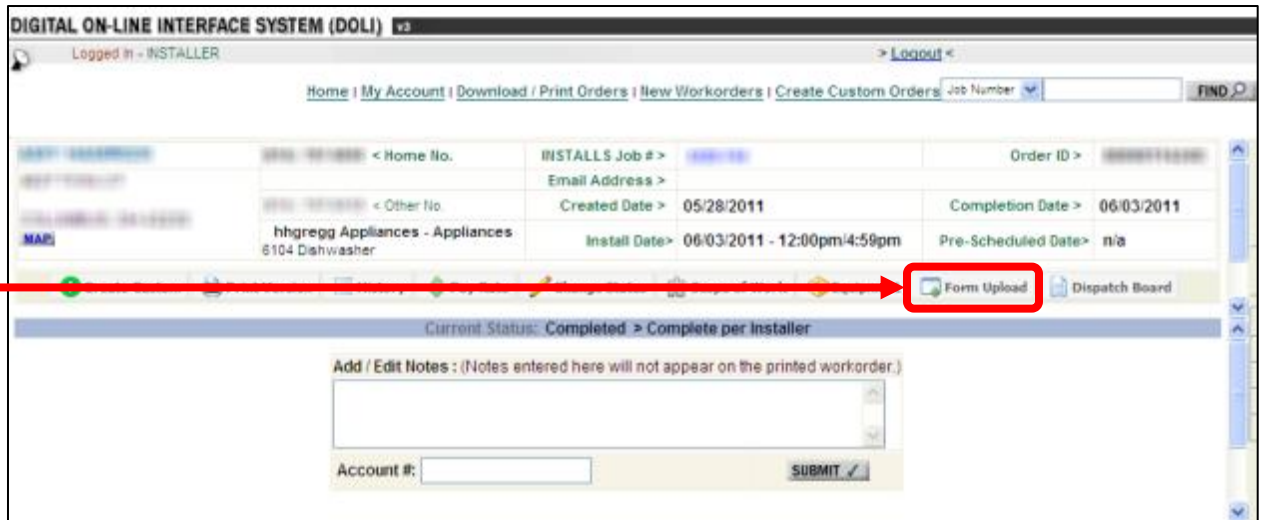
Remember, you can't get paid on an open job, so it is in your best interest to close the job in DOLI as soon as you complete the work!

Submitting Paperwork for Payment

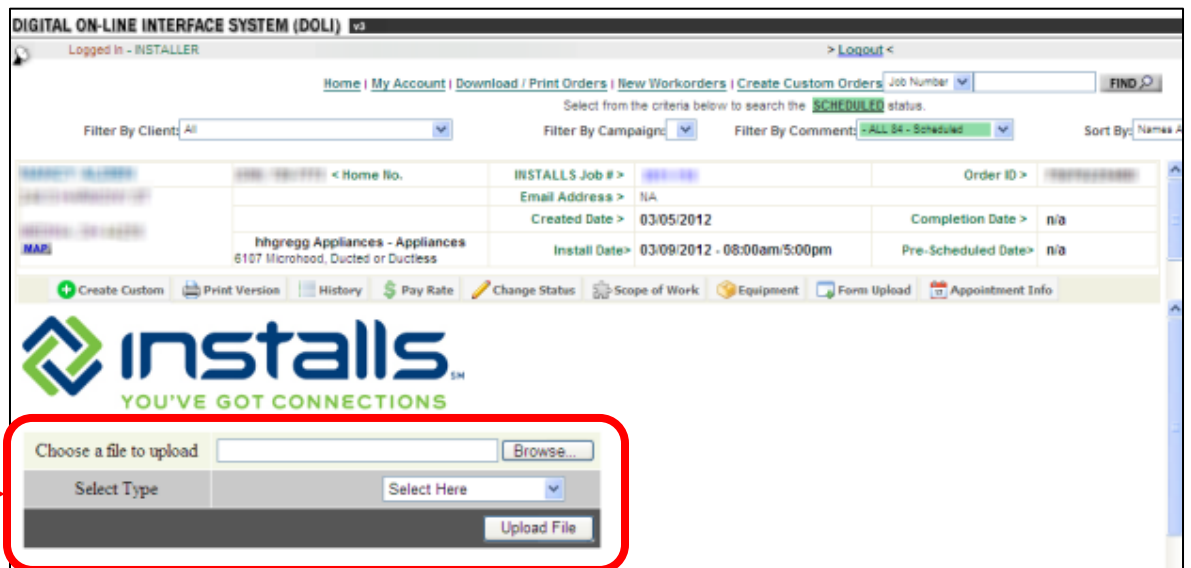
Note: Please use **one** of the following methods to submit paperwork to Installs for payment. Please do not submit the same paperwork by more than one method unless Installs asks you to do so. You should submit your completed paperwork for the job to Installs the **SAME DAY** the service is completed.

Uploading Paperwork to DOLI

1. Scan all completed, signed, initialed paperwork to a PDF file:
 - *Installs Installation Workorder*
 - *Installation Control Form*
 - *Installs Recycling Program Form*
2. Upload the PDF paperwork to the job in DOLI:
 - a. Click the **FORM UPLOAD** button on the Order Tool Bar.



Note: This displays the *Form Upload* screen.



- b. Click the **Browse** button.

Note: This opens the *Choose File to Upload* dialog box.

- c. Using the *Choose File to Upload* dialog box, locate and select the file you wish to upload to DOLI.
- d. Click the **Open** button on the *Choose File to Upload* dialog box.

Note: This closes the *Choose File to Upload* dialog box and enters the path to the selected file in the **Choose a file to upload** field in DOLI.

- e. From the **Select Type** drop-down list, select **Accounting Paperwork**.
- f. Click the **Upload File** button.

Note: This uploads the file and displays a link to the uploaded file.



- g. If you do not see a list of links to each uploaded file (you may need to scroll down), click the **FORM UPLOAD** button again to refresh the screen.

OR

Emailing Paperwork to Installs

- 1. Email PDF version of your completed, customer signed paperwork to paperwork@installs.com.

OR

Faxing Paperwork to Installs

- 1. Fax to 1-888-655-8621; please be sure to confirm fax was sent, and that all pages were included.

Note: Installs makes payments to service providers on Mondays. All paperwork submitted by midnight Eastern Time on Monday will be paid the following Monday. Installs makes all payments via Electronic Funds Transfer (EFT). For more information on Installs payments, see the [Submitting Paperwork for Payment](#) document on your DOLI homepage.