Digital Online Interface System (DOLI):
Installer Company Manual

Revised: 3 Jun 2013

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

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ABOUT THIS DOCUMENT

This document outlines information, procedures, and best practices related to Installs' **D**igital **O**n**L**ine **I**nterface (DOLI) system. As an installer company officer/principle, you will find this document useful for training and reference purposes.

Your technicians will not see the same DOLI screens detailed in this document; they will have access to a different set of screens, as outlined in the separate **Technician Guide: Digital Online Interface System (DOLI)** document.

Objectives

After reviewing this document, you will be able to:

- Use the DOLI System
- Work within Installs' DOLI processes and procedures
- Comply with expectations for accepting, updating, and closing out assigned work orders
- Utilize learning and help resources

Terms and Acronyms

Term	Definition
Client	The party who sold the installation service to the customer
Customer	The end user who purchased the installation service
DOLI	*Digital Online Interface System* Installs' order processing and communication tool
EIN	*Employee Identification Number* Also known as a Federal Tax Identification Number; used to identify a business entity
HT	Home Theater
Installer Company	The company performing the installation service at the customer's location
Job, Order, Workorder	Installation order
OEM	Original Equipment Manufacturer
PC	Personal Computer
SOW	Scope of Work

INTRODUCTION TO INSTALLS

Installs is an industry leader in providing in-home installation services in partnership with retailers and OEM companies. We have established standards by which service events are measured in America, Canada, and Puerto Rico.

Our network consists of more than 8,000 certified professional technicians. This large network of technicians performs most efficiently because they are always on the leading edge of product knowledge and technology.

Our success comes from supporting the brand promise of our partners, with a focus on providing high-quality in-home service to customers. We recognize that we are an extension of our clients' brands, and we have designed our systems to maximize the perception of brand quality.

WORKING WITH INSTALLS

Initial Account Setup

It is critical that we obtain all necessary information from you to establish your account so you can obtain work from Installs. Access to our systems will be established after you provide all of the following:

Contract	A fully executed contract is the first step in establishing a professional relationship between your business and our network. The contract outlines the relationship between Installs and your company.
Personal and Contact Information	In order to set up a system account, you must provide full address information. In addition, you must provide your Social Security Number or EIN/Federal Tax Identification Number, valid email address, two active telephone numbers, and banking information (for payment).
Coverage Area	You must provide coverage area information, which includes all of the counties and zip codes you cover.
Capacity	You must provide your capacity information. This is based on the amount of work your company can handle weekly, considering the number of technicians, office personnel, and phone lines your company has.
Skill Sets	You must complete a Skill-Set assessment detailing the type of work desired. This Skill-Set assessment is a valuable tool to Installs; as new lines of business emerge, it will help us identify possible installation candidates capable of job completion.
Certifications	You must provide a detailed account of industry certifications for specified work. Failure to do so may prevent access to network systems and the ability to obtain certain types of available work. An Installs representative will provide further information on this requirement during the activation of your account.
Licenses	In various locations, state, county, or local agencies may require licenses in order to perform installation or repair services. In such areas, it is your responsibility to obtain licensure and provide appropriate documentation to Installs. Failure to do so may prevent access to available work in these areas. An Installs representative will provide further information on this requirement during the activation of your account.

Contacting Installs

The Installs Field Support department assists new companies in the onboarding process and is available to answer your questions. Please contact Field Support at 1-888-490-4321, option 3, or email the territory team supporting your geographic area:

States	Territory Email Address
CT, DE, ME, MA, NH, NJ, NY, PA, RI, VT	T1@installs.com
DC, MD, NC, VA, WV	T2@installs.com
AL, GA, MS, SC, TN	T3@installs.com
FL	T4@installs.com
IN, KY, MI, OH	T5@installs.com
IL, IA, MN, NE, ND, SD, WI	T6@installs.com
AR, CO, KS, LA, MO, NM, OK, TX	T7@installs.com
AK, AZ, CA, HI, ID, MT, NV, OR, UT, WA, WY	T8@installs.com
General account inquiries; compliance paperwork	fieldrelations@installs.com

System Access

Once your account is activated, you will receive an email with your administrative DOLI username and password. Keep this information secure; without it, you may be delayed in retrieving any assigned work that has been routed to you.

Technical Requirements

Your computer system(s) must meet minimum technical requirements to interface with the Installs' online system. Although Installs does not require a specific brand of computer or operating system, we suggest that your system meet the following criteria:

Requirements

- PC with Internet access
- Internet Explorer 5.5 or higher, preferably version 7 or higher

Suggested Equipment

- Ink-jet or laser printer
- Scanner (preferred) or fax machine

INTRODUCTION TO DOLI

DOLI is Installs' proprietary browser-based **D**igital **O**n**L**ine **I**nterface communication system, which allows real-time communication of new orders, job status updates, job completions, escalations, and reporting between Installs, our clients, and installer companies and technicians.

This customized suite of software products has been proven in providing the best possible work schedule planning. It also maintains the most efficient schedule as circumstances change, and allows us to immediately review implementation, as well as identify potential for improvement. DOLI utilizes 128 bit encryption to ensure the utmost security of information.

Your familiarization with DOLI is imperative, as it is the primary method by which you will interface with Installs and obtain available work.

MANAGING YOUR DOLI ACCOUNT

In this section, we outline procedures for managing your account and users, viewing reports, and documenting visits to client stores.
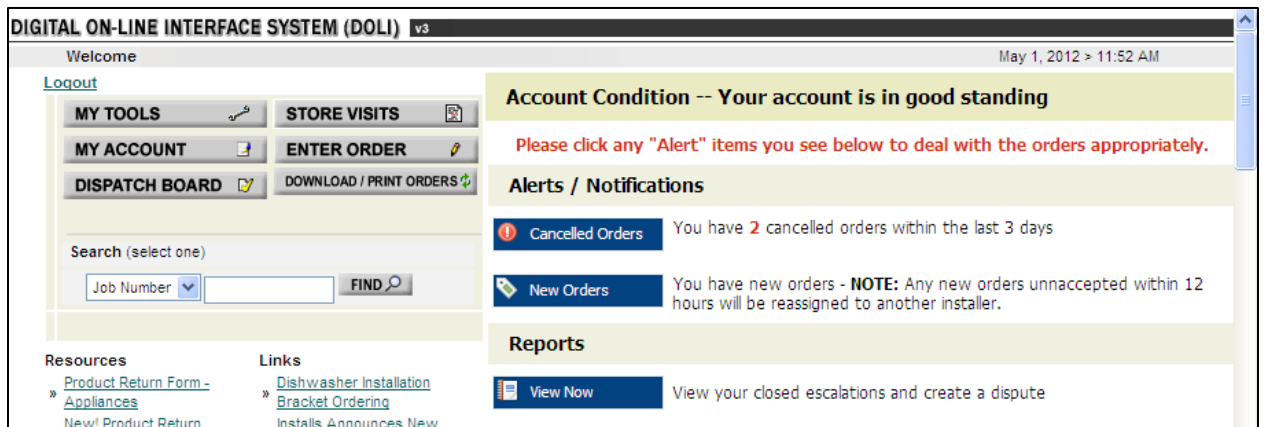
Accessing DOLI

1. Using a web browser, navigate to the DOLI site: https://doli.installs.com
2. In the **Login** box, enter your username and password in the fields provided.
    Note: Your username and password are case sensitive; enter them exactly as they were provided.
3. Click the **LOGIN** button.
    Figure 1
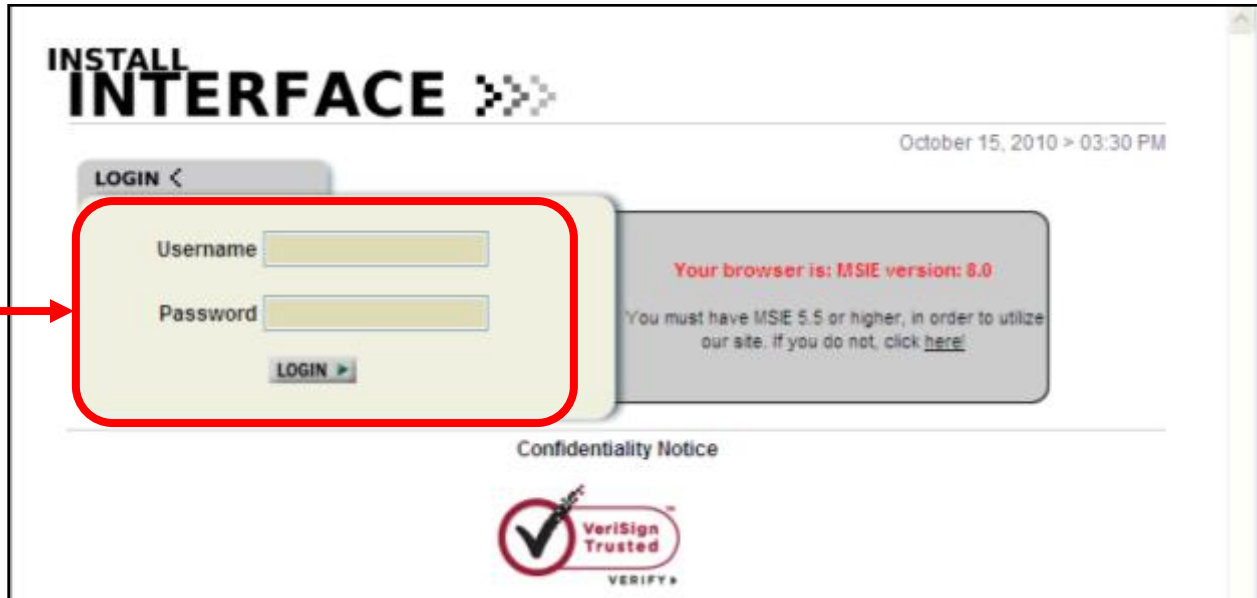
Note: This displays your personalized DOLI homepage.

Figure 2

DOLI Homepage Overview

Note: Your personalized DOLI homepage provides access to a variety of tools. Understanding these features will help you efficiently manage your Installs work. Below we highlight the key features of the DOLI homepage.
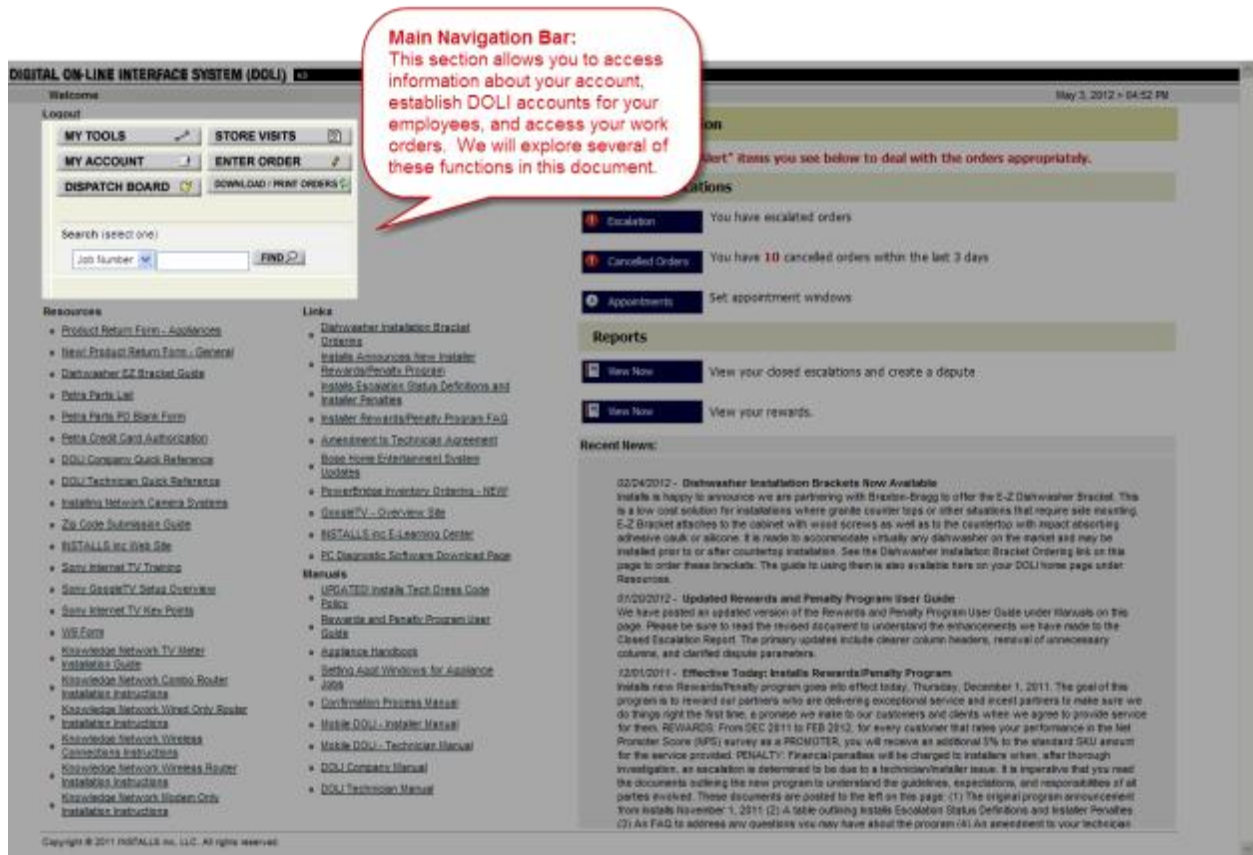
Figure 3

Figure 4

Figure 5

Figure 6

Figure 7

My Tools

> **Note:** The **MY TOOLS** function allows you to access features for adding and modifying information about your company and users.

1. On the Main Navigation Bar on the DOLI homepage, click the **MY TOOLS** button.

   Figure 8
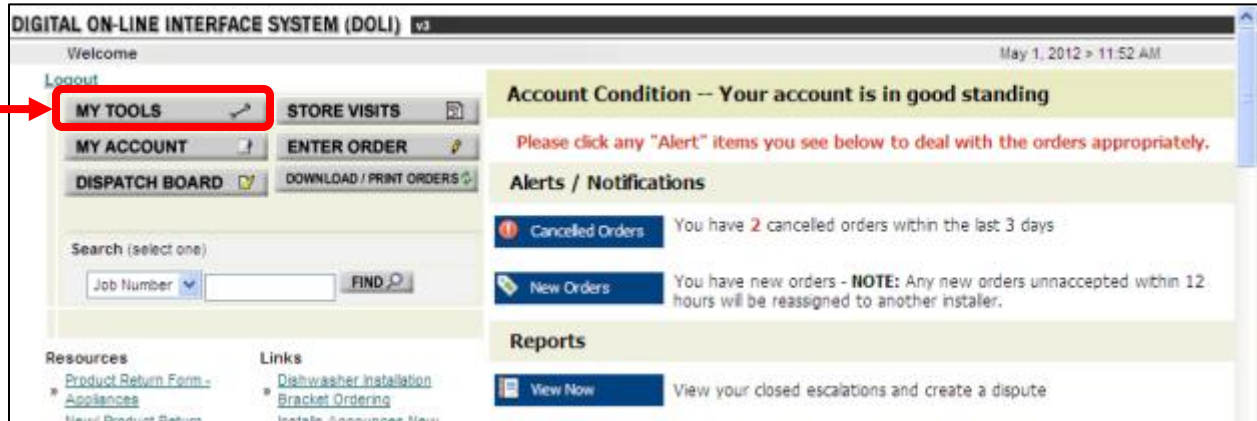
   > **Note:** This displays the *My Information* screen. Note the navigation menu on the left side of the screen:

   Figure 9
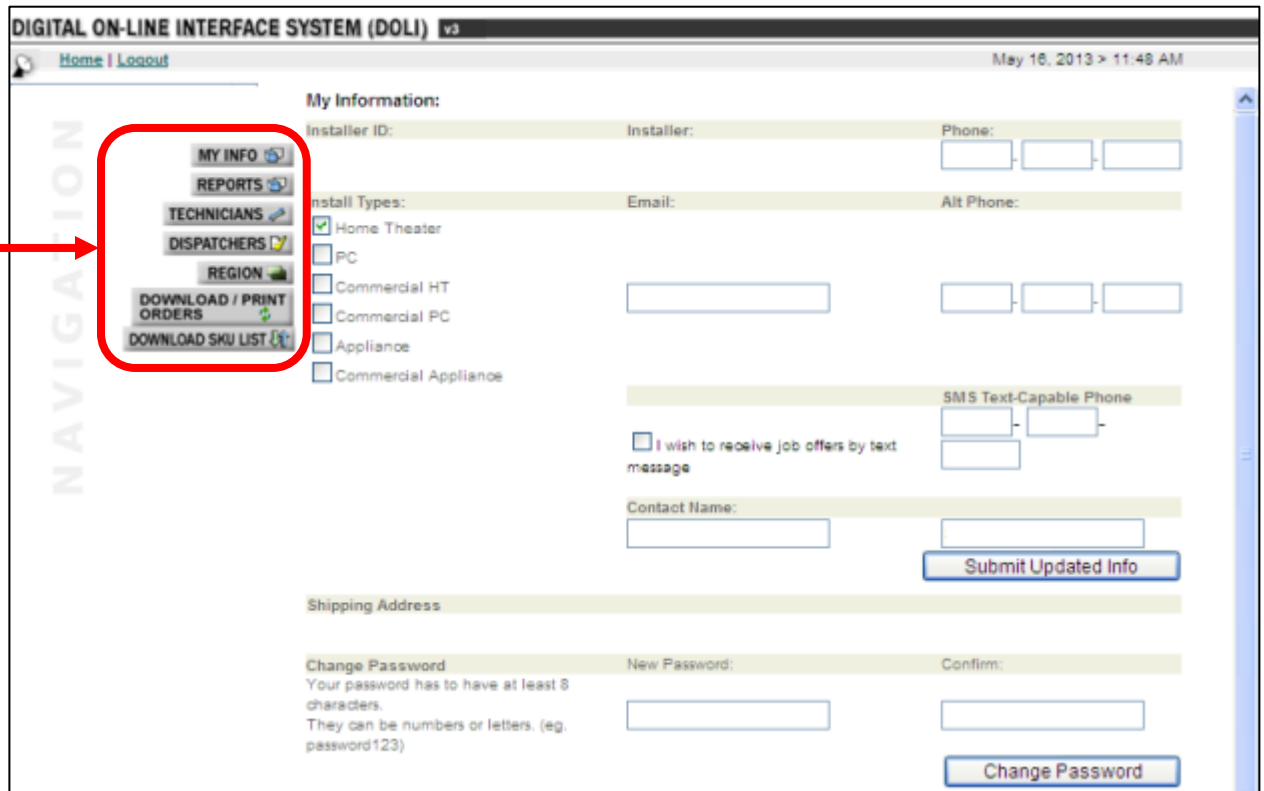
   The buttons on the navigation menu allow you to access features within **MY TOOLS** for managing your account. Key administrative functions are outlined in the procedures that follow.

My Info: Managing Company Information

Note: Use the **MY INFO** feature to review your account information and change your account password.

1. When you click the **MY TOOLS** button, the default screen displayed is the *My Information* screen. If you have navigated to another **MY TOOLS** feature, click the **MY INFO** button to return to the *My Information* screen.
2. To edit your account information, perform the following steps:
   a. Make the necessary changes on the *My Information* screen.
   b. Click the **Submit Updated Info** button.

   Figure 10

3. To opt in to SMS text messages from Installs, perform the following steps:
   a. On the *My Info* screen, click the "**I wish to receive job offers by text message**" check box on, and then enter the phone number in the **SMS Text-Capable Phone** fields provided.

      Note: The phone number you enter must be SMS-enabled.
   b. Click the **Submit Updated Info** button.

Figure 11

Note: Installs' SMS (Short Message Service) text messaging service allows you to receive text messages from Installs when jobs in your area need coverage. These messages are about jobs that are not yet assigned to any technician, and present opportunities for you to pick up additional work. Jobs sent to you via SMS text message are offered based on your technicians' DOLI Job and Client Skills and the proximity of the job to your location. Please note that your service carrier's regular text messaging rates will apply.

4. To change your DOLI password, perform the following steps:

    a. In the **New Password** field, type the desired password.

       Note: Your password must be at least eight (8) characters and can contain numbers and/or letters.

    b. In the **Confirm** field, retype the desired password.

    c. Click the **Change Password** button.

       Figure 12

Note: This changes your password.

Technicians: Creating Technician User Accounts

Note: You must complete this multi-step process to activate your technicians to perform Installs jobs. Your company will not receive any work from Installs until you set up your technicians in DOLI.

You should only set up a technician in DOLI after you have received notification from Installs that s/he has passed the Installs background check. **Do not set up DOLI accounts for technicians who have not passed, or have not had, an Installs background check.**

Step I: Add a technician to your account in DOLI

1. On the *My Information* screen, click the **TECHNICIANS** button.

   Figure 13

Note: This displays the *Create New Technician* screen. Use the **TECHNICIANS** feature to set up and modify DOLI access for the technicians in your employment.

2. To add a new technician to your account, complete each field on the *Create New Technician* screen, with the required information:

Figure 14

a. In the **First Name** field, type the technician's first name (up to 50 characters).

b. In the **Last Name** field, type the technician's last name (up to 50 characters).

c. In the **SBCA #** field, enter the technician's SBCA Member Number, if applicable (up to 50 characters).

d. In the **Phone** field, type the technician's primary work phone number (dashes [-] are allowed in the phone number).

   Note: If you want Installs to directly contact the technician regarding jobs, enter the technician's work phone number. If you prefer that Installs contact you or your office/dispatcher about jobs, enter the phone number you want Installs to use.

e. In the **Cell** field, type the technician's business cell phone number (dashes [-] are allowed in the cell number).

   Note: If you want Installs to directly contact the technician regarding jobs, enter the technician's work cell phone number. If you prefer that Installs contact you or your office/dispatcher about jobs, enter the cell phone number you want Installs to use.

f. In the **Pager** field, type the technician's business pager number (dashes [-] are allowed in the pager number), if applicable.

g. In the **Address** fields, type the technician's address.

   - Address (line 1) – up to 50 characters
   - Address (line 2) – up to 50 characters
   - City – up to 50 characters
   - State – select from drop down
   - ZIP Code – up to 10 characters

   Note: You may enter the technician's home address or the address of your company's central location. The address entered here, specifically the ZIP Code, will help DOLI determine if jobs are within the technician's coverage area. Installs recommends that you use the address/ZIP Code of the technician's daily starting location. For example:

   - If the technician comes to your office every day before rolling to jobs, enter the office's address.
   - If the technician starts each day at a warehouse, enter the warehouse address.
   - If the technician rolls to jobs directly from his/her home each day, enter the technician's home address.

h. In the **Email** field, type the technician's business email address (up to 50 characters).

> **Note:** If you want Installs to directly contact the technician regarding jobs, enter the technician's work email address. If you prefer that Installs contact you or your office/dispatcher about jobs, enter the email address you want Installs to use.

3. Click the **Submit** button.

> **Note:** This adds the new technician to the *Inactive Technicians* list on the screen. For the purposes of this document, we are creating and maintaining a technician named BEN JONES.

Figure 15

Step II: Create a DOLI username and password for the technician

4. On the *Create New Technician* screen, click the **User Info** link next to the new technician's name.

Figure 16

> **Note:** This displays the *Edit Technician Login* screen.

Figure 17

> **Note:** This feature allows you to create a unique username and password for the technician to access DOLI and allows you to update the technician's status for Installs jobs. You **must** complete this step in order for the technician to receive and update Installs work via DOLI.
>
> The **SP ID** that appears on this screen is a unique identifier that DOLI automatically assigns to each technician. For PC Technicians: If you want to register for access to the Dell Training Tool (DTT), you will need this SP ID. See the document, "Accessing Dell Training via Installs," on your DOLI homepage for more information about DTT.

a. In the **UserName** field, type a username for the technician to use to log in to DOLI (up to 30 characters).

> **Note:** The username you create for the technician is case-sensitive; if you enter uppercase and lowercase letters, the technician will need to be sure s/he types the correct casing when logging in to DOLI.
>
> > **Example:** If you create username **benjones1970**, the technician must type the username in all lowercase letters when logging in to DOLI. If you create username **BenJones1970**, the technician must type the username with the same capital and lowercase letters you used when you created the username.

b. In the **Password** field, type a password for the technician to use to log in to DOLI (up to 32 characters).

> **Note:** Passwords must comply with the following requirements:
> - Contain at least eight (8) characters
> - Contain at least one (1) number
> - Contain at least one (1) letter
> - Contain at least one (1) capital letter
> - May contain special characters such as !, @, #, $, %, ^, &, *, -, _, +, etc.
>
> **Example:** Unacceptable password: **hockeyfan**
>
> Acceptable password: **Hock3yF@n!**
>
> The password you create for the technician is case-sensitive; when logging in to DOLI, the technician must type the password with the same capital and lowercase letters you used when you created the password.
>
> For security reasons, the password will be masked as you type it; you will see ••• rather than the characters you actually type. This means that you will not be able to look up the password if the technician later forgets it. If the technician loses or forgets his/her password, you must return to the **User Info** link for the technician and create a new password. Neither the installer nor Installs can see or recover forgotten passwords.

c. If the technician is approved to perform jobs for Installs, click **Yes** under **Active** to activate the technician.

d. Click the **modify** button to save the changes.

e. Click the **Back** link to return to the *Create New Technician* screen.

Figure 18
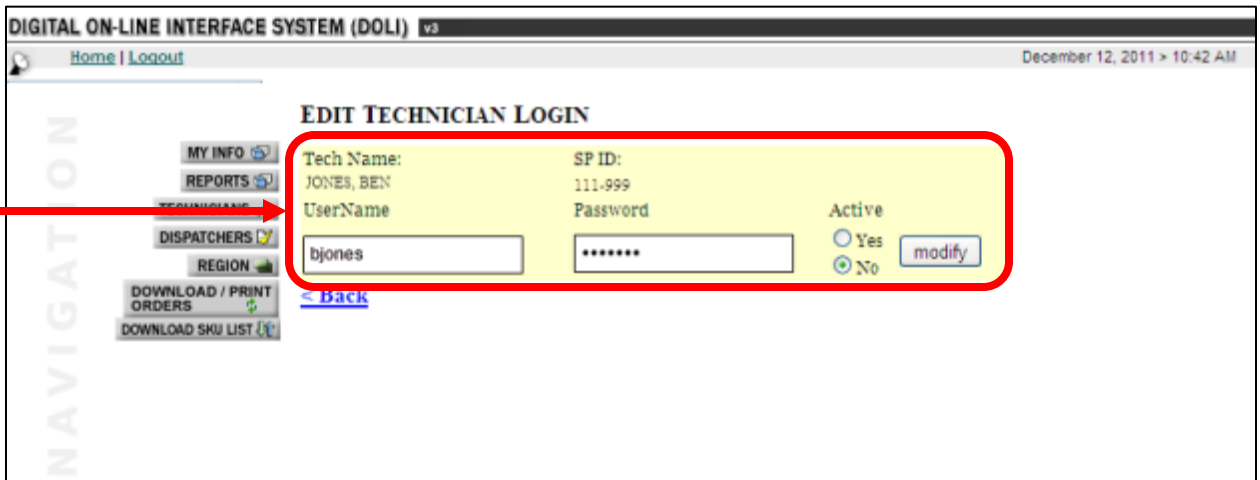
Note: The newly added technician will appear in the *Active Technicians* list when you return to the *Create New Technician* screen.

Figure 19
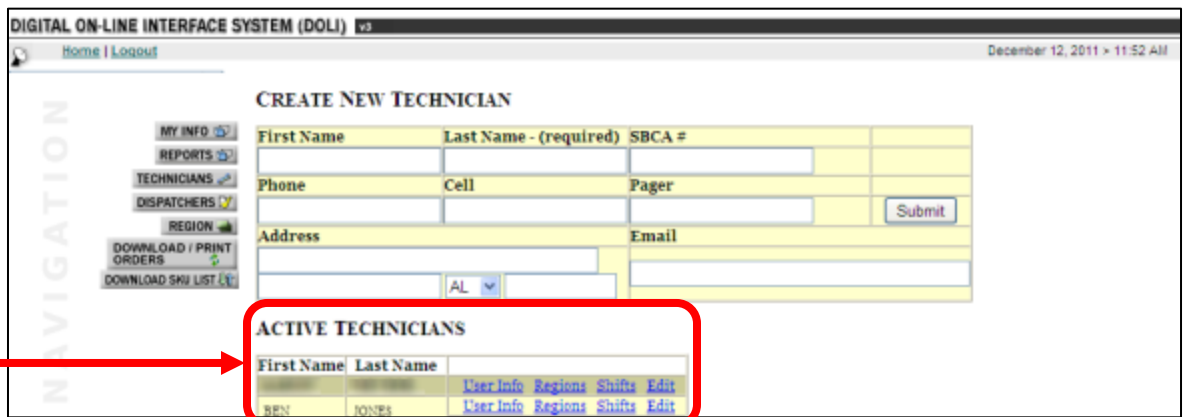
f.   Provide the username and password with proper casing to the technician so s/he can access the Technician view of DOLI to view, accept, print, update, and close out jobs.

Step III: Set up the geographic areas the technician will work

5. On the *Create New Technician* screen, click the **Regions** link next to the new technician's name.

Figure 20
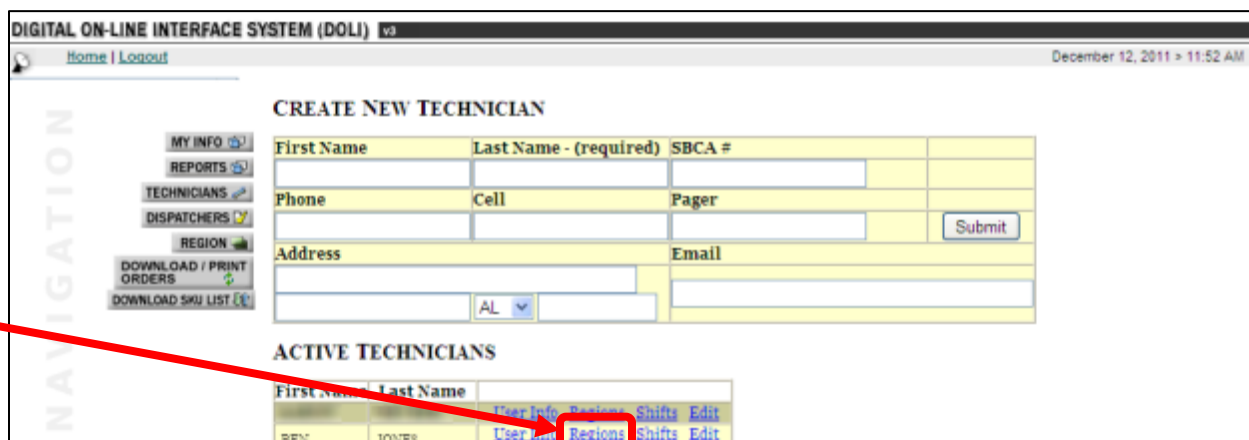
Note: This displays the *Edit Technician Regions* screen.

> This feature allows you to specify the geographic area(s) in which the technician can be assigned Installs jobs.

a. Click the checkbox corresponding to each geographic region in which the new technician will work.

> **Note:** The regions displayed are created by Installs when we set up your Installer account. If you need to update your list of regions, contact Installs Field Relations at 1-888-490-4321.

b. Click the **modify** button to save the changes.

c. Click the **Back** link to return to the *Create New Technician* screen.

Figure 21
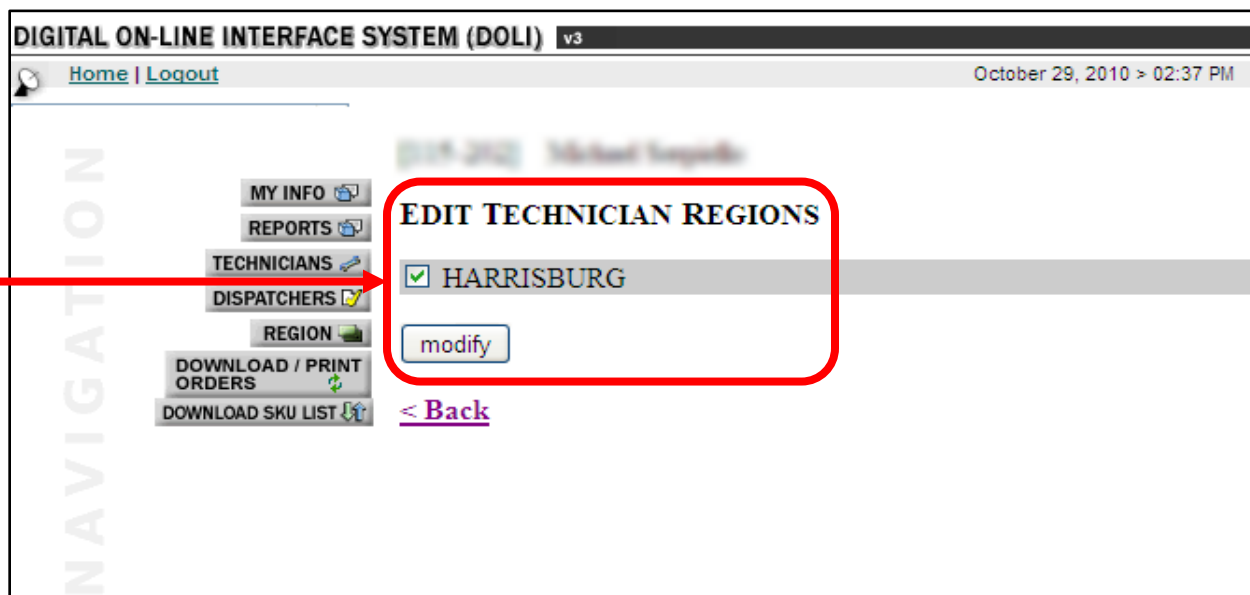
> **Note:** You **must** select a region in order for work to be routed to the technician, and for the technician to be added to your DOLI dispatch board. If you do not select a region, work will not be routed to the technician, as DOLI will not know where the technician works.

Step IV: Set up the shifts the technician will work

6. On the *Create New Technician* screen, click the **Shifts** link next to the new technician's name.

Figure 22
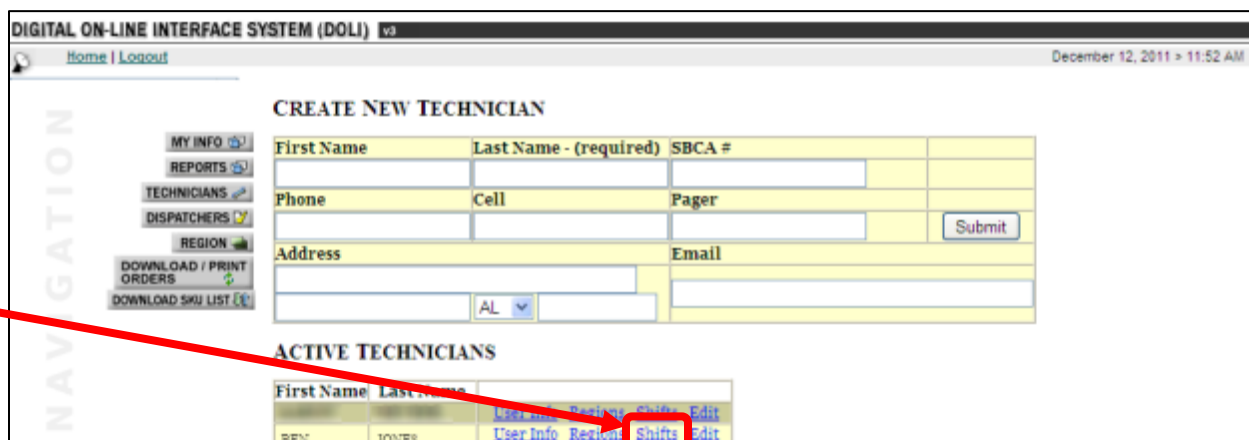
Note: This displays the *Edit Technician Shifts* screen.

Figure 23
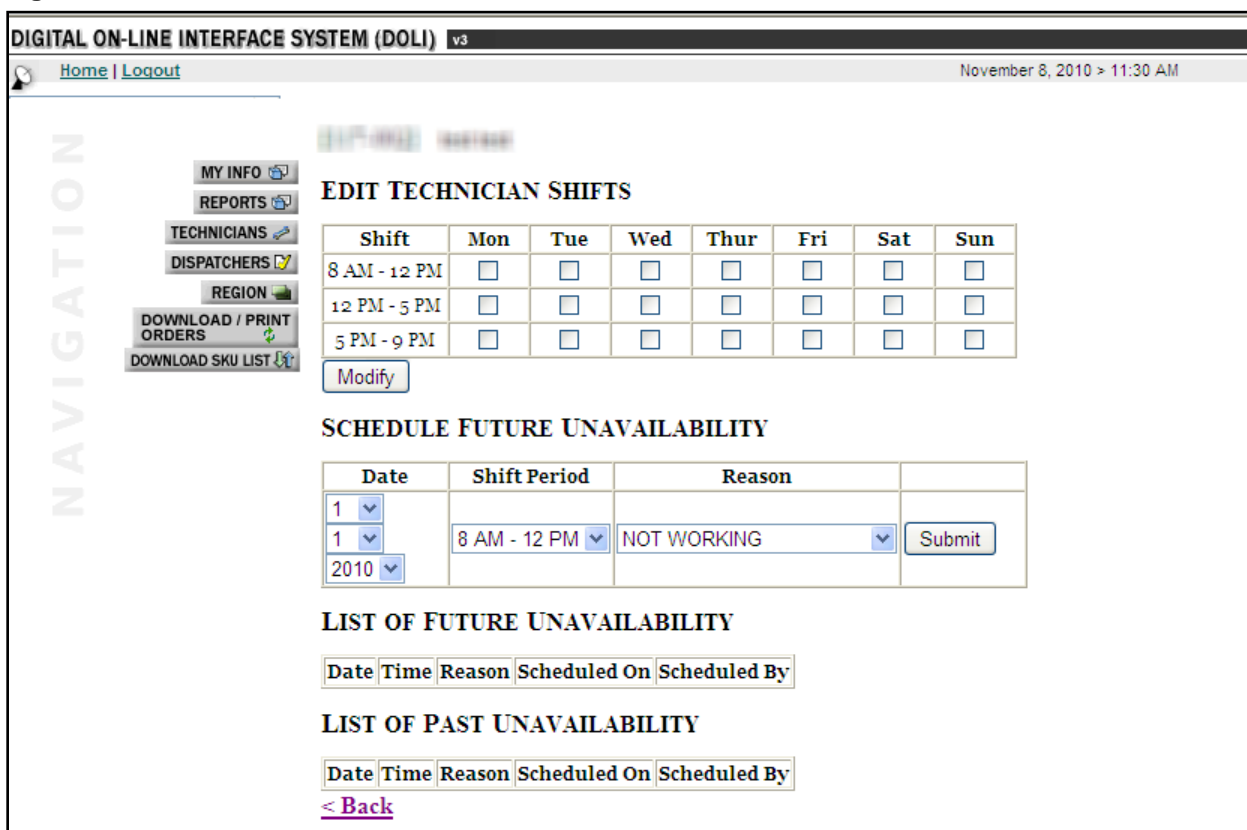
This screen allows you to specify the days of the week and shifts that the technician works.

a. Under **Edit Technician Shifts**, click the checkboxes corresponding to the timeframes that the technician is available to work each day of the week.

b. Click the **Modify** button to save the technician's shifts.

Figure 24

Step V: Set up the technician's future time off (shift exception)

7. Stay on the *Edit Technician Shift*s screen.

8. If you know that the technician will not be available for Installs jobs for specific shifts on specific dates, enter the time off in DOLI under **Schedule Future Unavailability**.

   Note: This feature allows you to notify Installs when a technician will be unavailable to complete Installs jobs.

   a. Select the **Date, Shift Period, and Reason** from the drop-down lists provided.

   b. Click the **Submit** button to save the Future Unavailability.

   Figure 25

   Note: The system will only route work to the technician for the shifts indicated as available.

   You must complete these steps for each day the technician will be unavailable. For example, if the technician will be off June 11, 12, and 13, then you must individually enter the time off for the 11th, then for the 12th, and then for the 13th; you will perform the steps above three (3) times.

   If a technician will be unavailable for more than three (3) consecutive days, please call Installs' Field Relation department (1-888-490-4321) to have us set the technician as temporarily inactive.

   c. Click the **Back** link to return to the *Create New Technician* screen.

Step VI: Set up the technician's contact information and travel parameters

9. On the *Create New Technician* screen, click the **Edit** link next to the new technician's name.

Figure 26

Note: This displays the *Edit Technician* screen.

Figure 27

This feature allows you to maintain the technician's contact information, as well as the details about the technician's capacity and travel capabilities for Installs jobs.

a. Under **Edit Technician**, add or update contact information for the technician as necessary.

b. Also under **Edit Technician**, define the area the technician is available to cover.

   Note: DOLI uses the information you enter in the next four fields to determine the most efficient routing of your technician's jobs. It is in your technician's best interest for you to maintain accurate information in the **Starting ZIP Code**, **Ending ZIP Code**, **Efficiency**, and **Maximum Travel Time** fields.

   i. In the **Starting ZIP Code** field, type the ZIP Code from which the technician starts out each day.

   Note: You may enter the technician's home ZIP Code or the ZIP Code of your company's central location. The ZIP Code entered here will help DOLI determine if jobs are within the technician's coverage area. Installs recommends that you use the address/ZIP Code of the technician's daily starting location. For example:

   - If the technician comes to your office every day before rolling to jobs, enter the office's ZIP Code.
   - If the technician starts each day at a warehouse, enter the warehouse ZIP Code.
   - If the technician rolls to jobs directly from his/her home each day, enter the technician's home ZIP Code.

   ii. In the **Ending ZIP Code**, type the ZIP Code in which the technician ends each day.

   Note: For most efficient routing, you should enter the same ZIP Code in the **Starting ZIP Code** and **Ending ZIP Code** fields, unless otherwise instructed by Installs.

iii. In the **Efficiency** field, type the **Efficiency** value that reflects the technician's ability to complete jobs within the standard duration.

Note: DOLI uses the value you enter in the **Efficiency** field to determine how much time a technician has available to complete a job. The following scale should be used to determine what value to enter in the **Efficiency** field:

Efficiency Value	Efficiency Percentage
0	0%
1	30%
2	50%
3	70%
4	90%
5	100%
7	110%
9	120%
11	130%
13	140%
15	150%
17	160%
19	170%
21	180%
23	190%
25	200%
…and so on	

The scale above is used in conjunction with the standard duration assigned to Installs SKUs. Each Installs SKU is assigned a standard duration, which is the amount of time it should take an average-speed, average-skilled technician to complete the job.

Using this scale, a technician who has an **Efficiency** value of 5 is 100% efficient, meaning that s/he completes most jobs within the standard duration assigned to the job (it takes the tech two hours to complete two-hour jobs). A technician who has an **Efficiency** value of 2 is 50% efficient, meaning that it takes the technician two times the standard duration to complete jobs (it takes the tech four hours to complete two-hour jobs).

The **Efficiency** value is manually determined and maintained by the installer; it is not calculated by Installs or by DOLI. It is important that the installer maintain each technician's **Efficiency** value, adjusting it as technicians become more or less time-efficient on jobs. As previously mentioned, DOLI uses the value in the **Efficiency** field to determine if a technician has enough time available to complete a job that needs to be assigned. Consider the following scenario:

> *You assigned an **Efficiency** value of 2 to inexperienced technician Ben Jones when he started with your company a year ago. Over time, Ben has become quite effective and is able to complete most jobs within the standard duration, but you have not updated his **Efficiency** rating in DOLI; it is still set to 2.*

Because Ben's **Efficiency** value is still set at 2, DOLI "believes" that it still takes Ben two times the standard duration to complete jobs; DOLI "thinks" it takes Ben 4 hours to complete jobs that should be completed in 2 hours. Therefore, Ben may not be considered available for jobs because DOLI "thinks" he will not be able to complete them in time to make it to his next assignments.

By updating Ben's **Efficiency** value to one that more accurately reflects his ability to complete jobs near or within the standard duration, you may make Ben available to DOLI for more jobs. This does not mean that Ben will receive more work, but it does mean that DOLI may present Ben as available more often.

Bottom line: An inaccurate **Efficiency** value can cause technicians to lose out on opportunities for jobs.

iv. From the **Maximum Travel Time** drop-down list, select the maximum amount of time the technician is willing or able to drive from his/her starting ZIP Code to complete a job **WITHOUT** a trip charge.

v. Click the **Submit Edit Technician** button to save the changes.

Figure 28

Step VII: Set up the technician's Job Skills and Client Skills

10. Stay on the *Edit Technician* screen.
11. Under **Job Skills**, click the checkbox corresponding to each Job Skill the technician possesses.
12. Under **Client Skills**, click the checkbox corresponding to each Client Skill the technician possesses.
    Note: The client skill **Generic Third Party** refers to all clients who do not have separate skill sets listed.
13. Click the **Submit Job and Client Skills** button to save the changes.

Figure 29

Note: It is important to keep Job Skill and Client Skill sets accurate and current, as the system will only route work to technicians who possess the proper skill sets to complete the job. See the "Appendix I: Job Skills Definitions" section of this document for more information.

Note: See the "Managing Technicians in DOLI" document on your DOLI homepage for detailed instructions on maintaining technician accounts in DOLI.

Download SKU List: Viewing SKU Rates and Scopes of Work

Note: There are two "levels" for viewing rates in DOLI with the installer administrative DOLI username and password. The first, explained here, is at the administrative level. You can search for SKUs using a variety of criteria, and then view your pay rates and Scopes of Work.

The second way to view pay rates for SKUs is at the job level; see the "Pay Rate: Viewing SKU Rates on a Job" section of this document for more information.

Rates are not visible in the Technician view of DOLI; only users logging in with your administrative DOLI username and password will be able to view rates in DOLI.

Note: The rates displayed in this document are for demonstration purposes only, and do not reflect the actual rate paid on any SKU to any installer.

1. On the *My Information* screen, click the **DOWNLOAD SKU LIST** button.
   Figure 30

   Note: This displays the rates screen.
   Figure 31

2. There are multiple options for searching for SKUs using the *Filter SKUs* panel.
   a. To search by specific SKU number, perform the following steps:
      i. In the **SKU** field, type the SKU number for which you want to see the rate.
      ii. Click the **Get SKU List** link.

Figure 32

Note: This displays the searched SKU, SKU name, and your rate for the SKU.

Figure 33

Note: After performing a search, you should clear all fields used before performing a different type of search. For example, if you performed a search by SKU, clear the previous search before proceeding to a search by SKU Type. Click the **Download SKU List** button on the left navigation menu to refresh the screen and clear all fields and previous search results.

b.   To search by SKU Type, perform the following steps:

i.   From the **SKU Type** drop-down list, select the type of SKU for which you want to see rates.

Figure 34

- **HT:** Home Theater, TV, Projector, Screen, Custom Labor SKUs
- **DBS:** Satellite SKUs
- **Other:** Miscellaneous Service SKUs
- **PC:** Personal Computer SKUs
- **Appliance:** Appliance SKUs

- **Remote:** Remote Service SKUs

ii. Click the **Get SKU List** link.

Note: This displays the searched SKUs, SKU names, and your rates for the SKUs. It may take a few moments for results to be displayed.

Figure 35

Note: Watch for the in-frame vertical scroll bar, indicating that there are more search results below those displayed on the screen.

Figure 36

Note: After performing a search, you should clear all fields used before performing a different type of search. For example, if you performed a search by SKU Type, clear the previous search before proceeding to a search by Client SKU Mapping. Click the **Download SKU List** button on the left navigation menu to refresh the screen and clear all fields and previous search results.

c. To search for SKUs by client, perform the following steps:

   i. From the **Client SKU Mapping** drop-down list, select the client for which you want to see rates.

   Figure 37

   ii. Click the **Get SKU List** link.

   Note: This displays the searched SKUs, SKU names, and your rates for the SKUs. It may take a few moments for results to be displayed.

   Figure 38

   Note: Watch for the in-frame vertical scroll bar, indicating that there are more search results below those displayed on the screen.
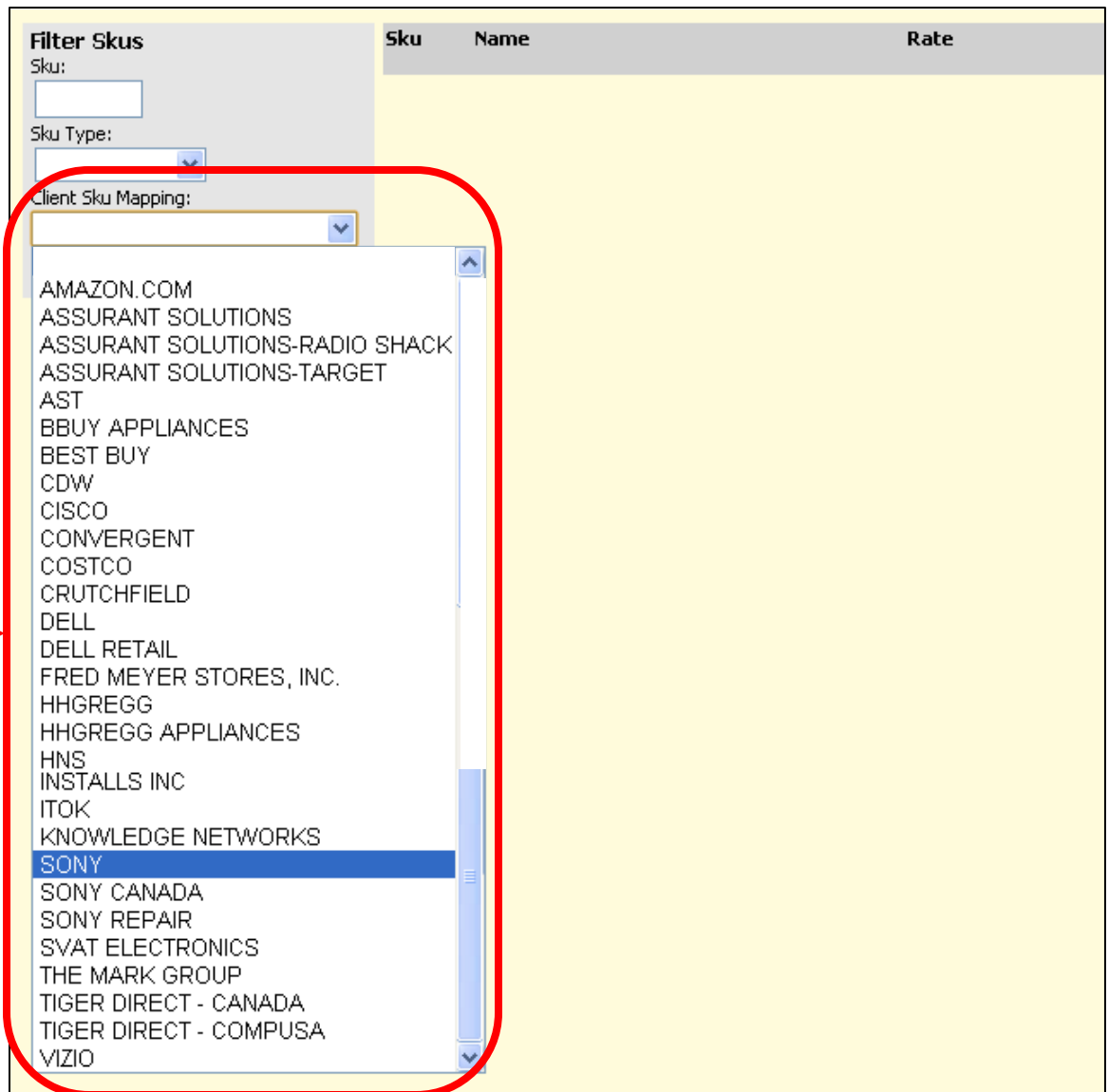
Figure 39

> **Note:** After performing a search, you should clear all fields used before performing a different type of search. For example, if you performed a search by Client SKU Mapping, clear the previous search before proceeding to a search by SKU Type within a Client SKU Mapping. Click the **Download SKU List** button on the left navigation menu to refresh the screen and clear all fields and previous search results.

d. To view rates for a certain SKU Type within a specific client SKU mapping (e.g., PC SKUs offered by COSTCO), perform the following steps:

    i.   From the **SKU Type** drop-down list, select the type of SKU for which you want to see rates (e.g., PC).

    ii. From the **Client SKU Mapping** drop-down list, select the client for which you want to see rates (e.g., COSTCO).

    iii. Click the **Get SKU List** link.

       Note: This displays the searched SKUs, SKU names, and your rates for the SKUs. It may take a few moments for results to be displayed.

Figure 40

e. To view your rates for all SKUs, perform the following steps:

    i.   Click the **Download SKU List** button on the left navigation menu to refresh the screen, clearing all fields and previous search results.

    ii. Click the **Get SKU List** link.

       Note: This displays all SKUs, SKU names, and your rates for the SKUs. It may take a few moments for results to be displayed.

f. To view the Scope of Work (SOW) for any SKU in any search result, click the hyperlinked SKU number.
Note: This displays the SOW in a pop-up window.

Figure 41
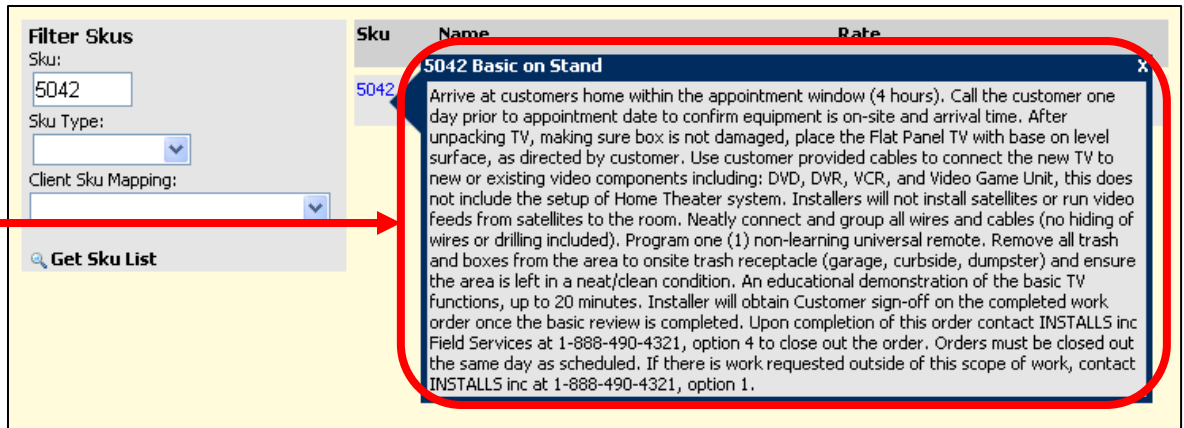
Note: To close the SOW, click the **X** in the upper right corner of the pop-up window.

Dispatchers: Creating Dispatcher User Accounts

Note: Use the **DISPATCHERS** feature to manage DOLI access for the dispatchers at your company.

Dispatchers are non-technician employees within your company who are responsible for working in DOLI. Dispatchers are categorized separately to give you maximum control over who has DOLI access, and to give you visibility to transaction tracking.

Dispatchers DOLI access is similar to administrative access, however Dispatchers cannot change company contact information, cannot change the administrative password, and cannot view rates.

1. On the *My Information* screen, click the **DISPATCHERS** button.

Figure 42
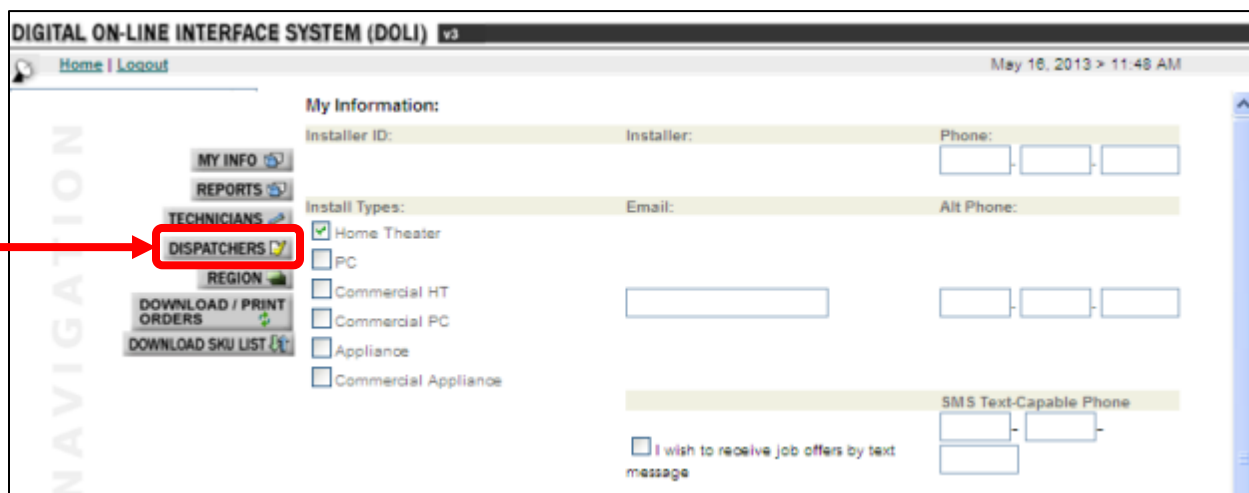
Note: This displays the *My Dispatcher's Information* screen.

Figure 43
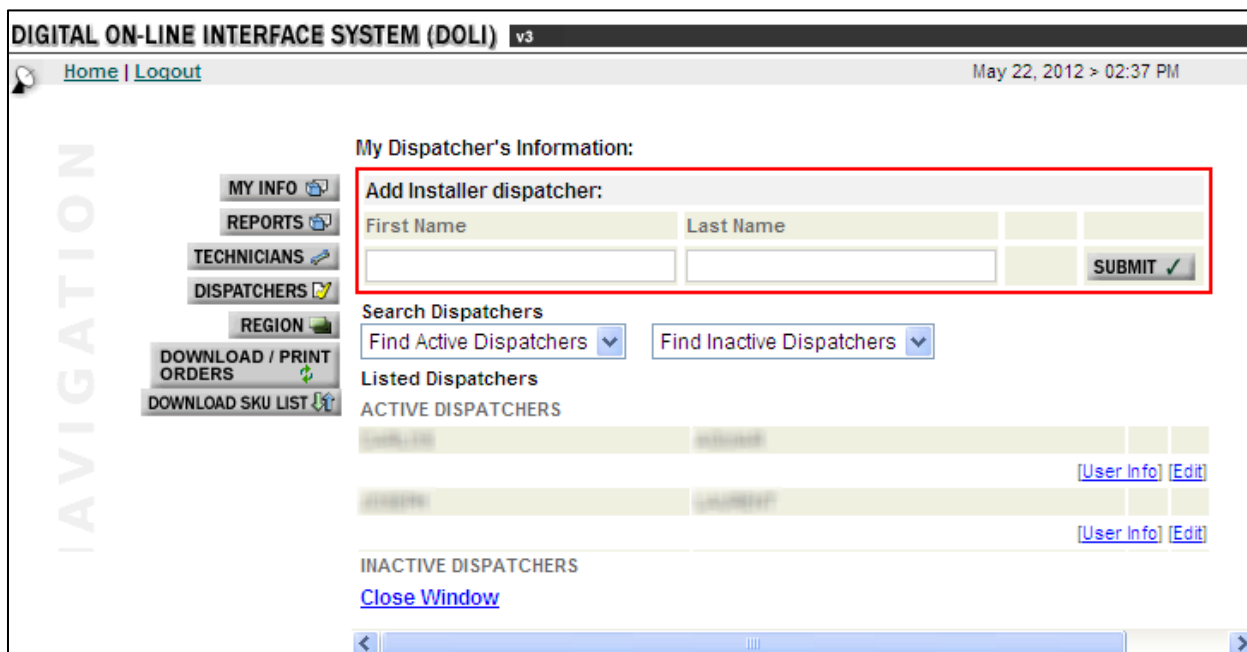
2. In the **Add Installer Dispatcher** box, enter the first and last name of the dispatcher in the appropriate fields.
3. Click the **SUBMIT** button to save the changes.
    Note: This adds the new dispatcher to the *Inactive Dispatchers* list.

4. Click the **User Info** link corresponding to the new dispatcher's name to create a DOLI username and password for the dispatcher.

Figure 44

Note: This displays the *Edit Dispatcher Login* screen.

Figure 45
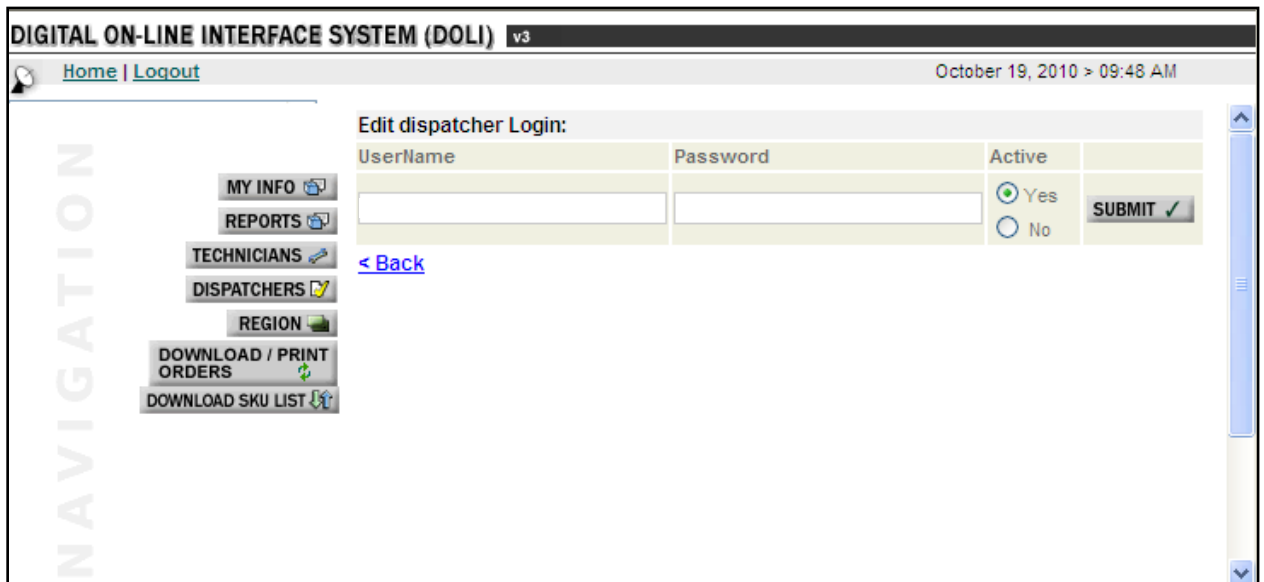
5. On the *Edit Dispatcher Login* screen, enter a username and password for the dispatcher in the appropriate fields.
6. Toggle the **Active** radio button to **Yes** to activate the dispatcher's account.
7. Click the **SUBMIT** button to save the changes.

   Note: Be sure to provide the username and password to the dispatcher.

8. To edit the dispatcher's name, click the **Edit** link corresponding to the dispatcher's name on the *My Dispatcher's Information* screen.

Figure 46
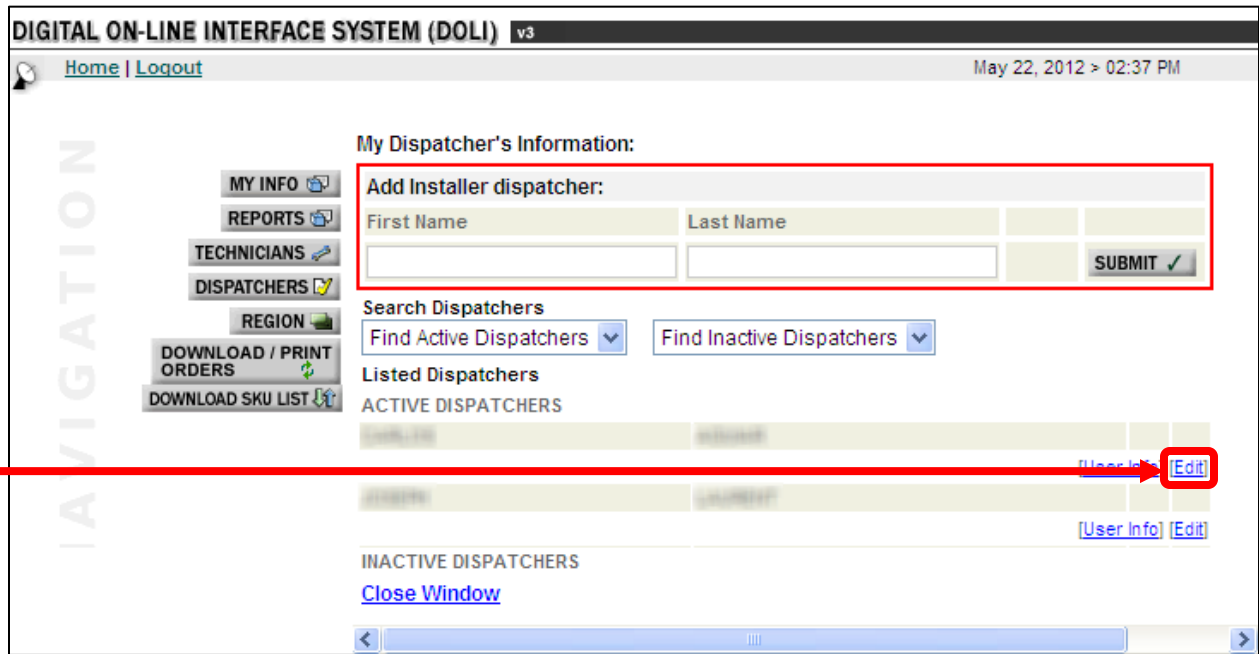
Note: This displays the *Edit Dispatcher* screen.

Figure 47
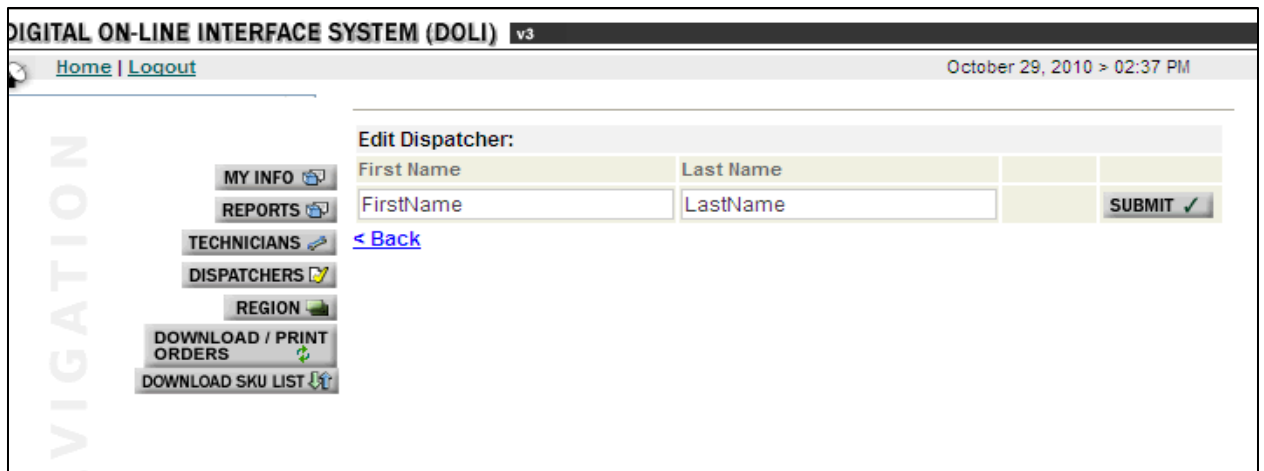
9. Make the necessary updates to the dispatcher's name.
10. Click the **SUBMIT** button to save the changes.

Reports: Viewing Account-Specific Reports

Note: Use the **REPORTS** function to access several reports related to your account.

1. On the *My Information* screen, click the **REPORTS** button.

    Figure 48
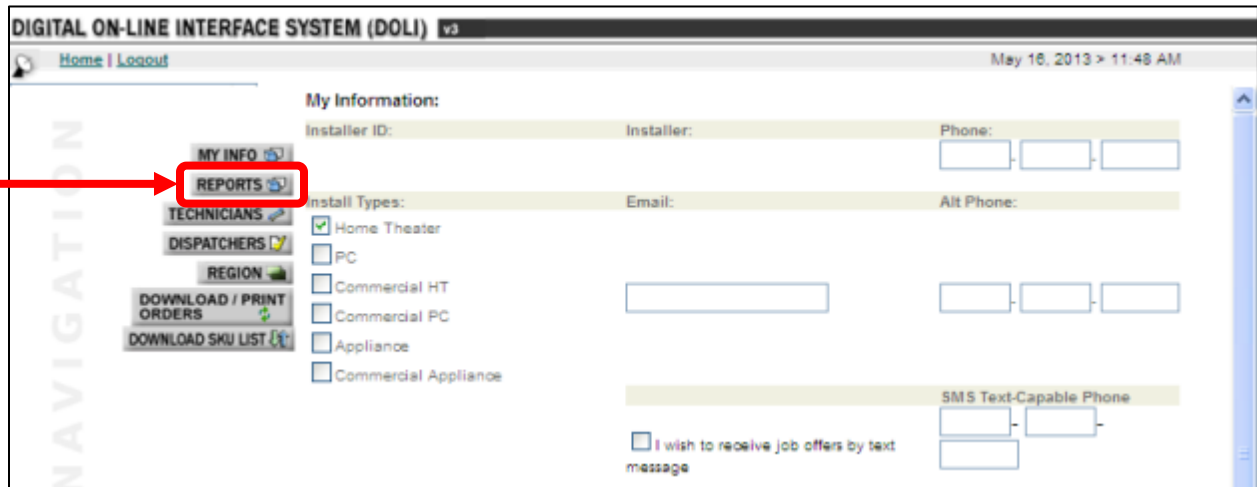
Note: This displays the reports screen.

Figure 49
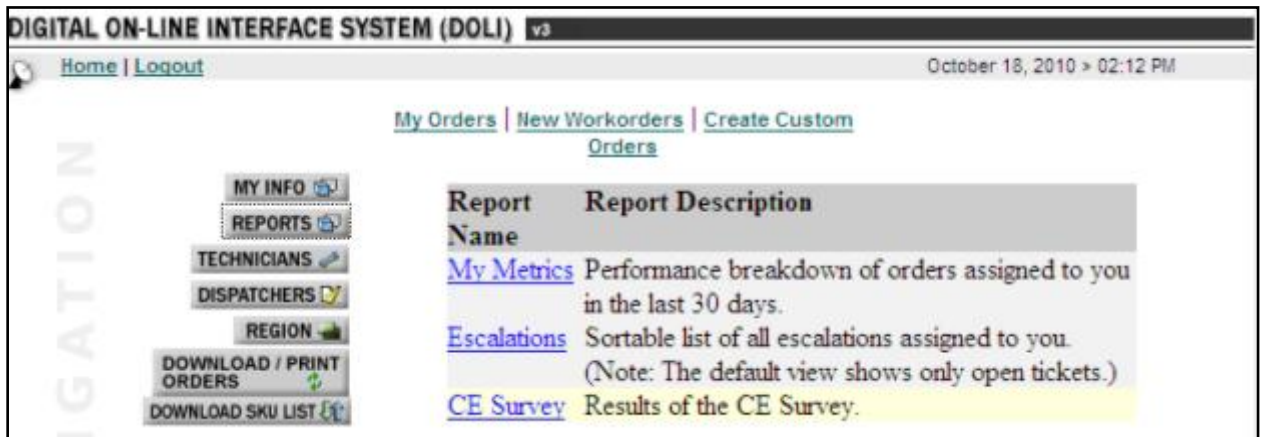
Links to the following reports are available:

a. **Report Name: My Metrics.** Performance breakdown of orders assigned to you in the last 30 days.
    Figure 50
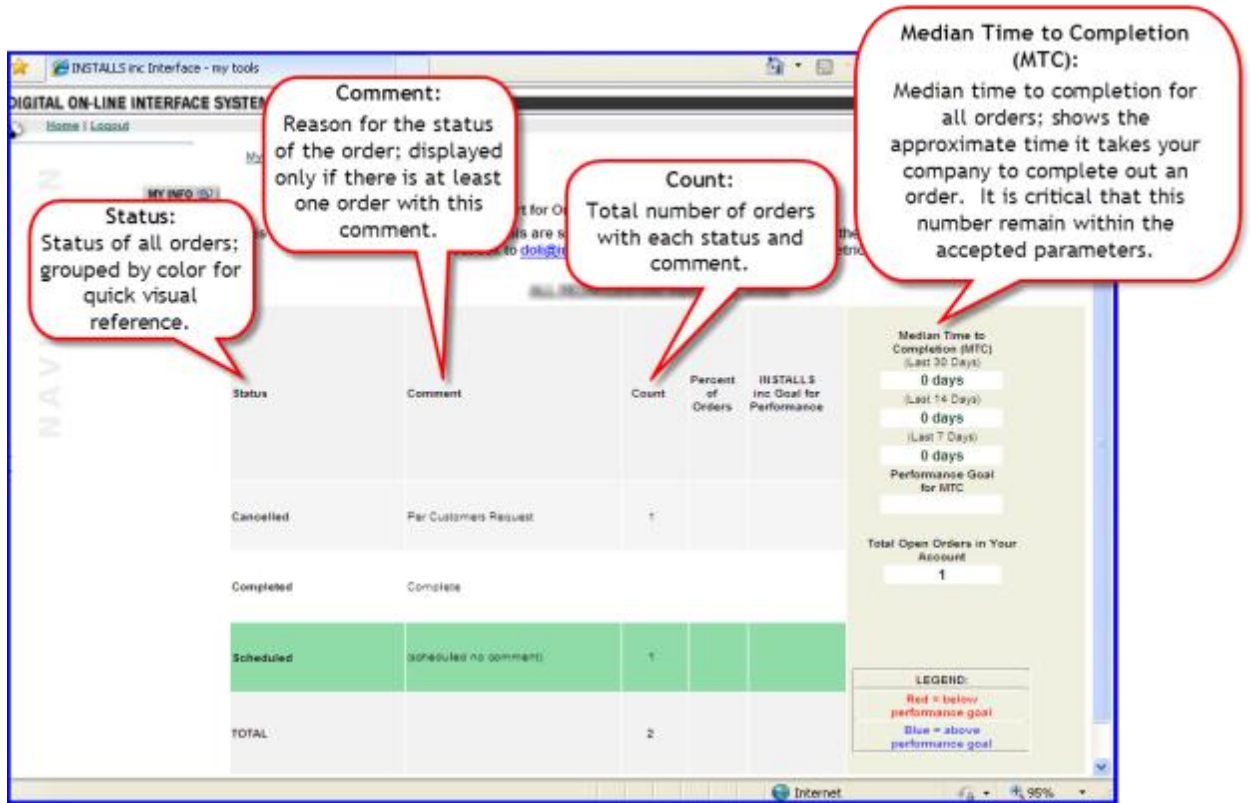
b. **Report Name: Escalations.** Sortable list of all escalations assigned to you.
    Figure 51

Note: The default view shows only open escalated tickets. To view other escalations, click the **View All Escalation Tickets** link.

    c. **Report Name: CE Survey.** Results of completed Dell Customer Experience Surveys.

    Figure 52
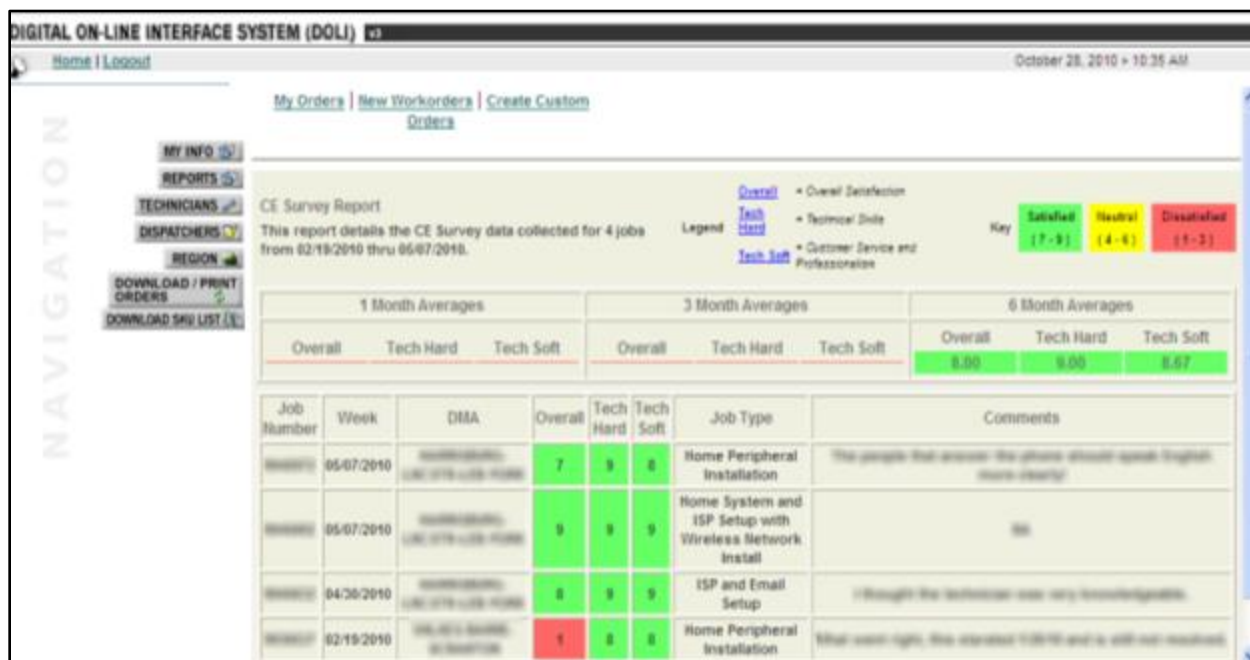
    d. **My Orders:** Summary of orders on your account by client.

    Figure 53
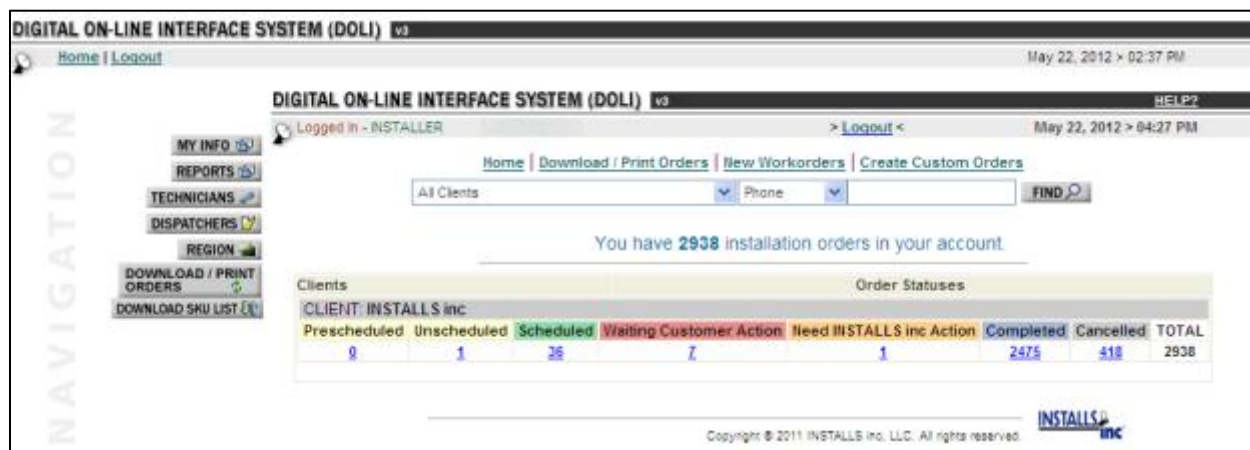
    e. **New Work Orders:** Returns you to the DOLI homepage to access your new orders.

    Figure 54
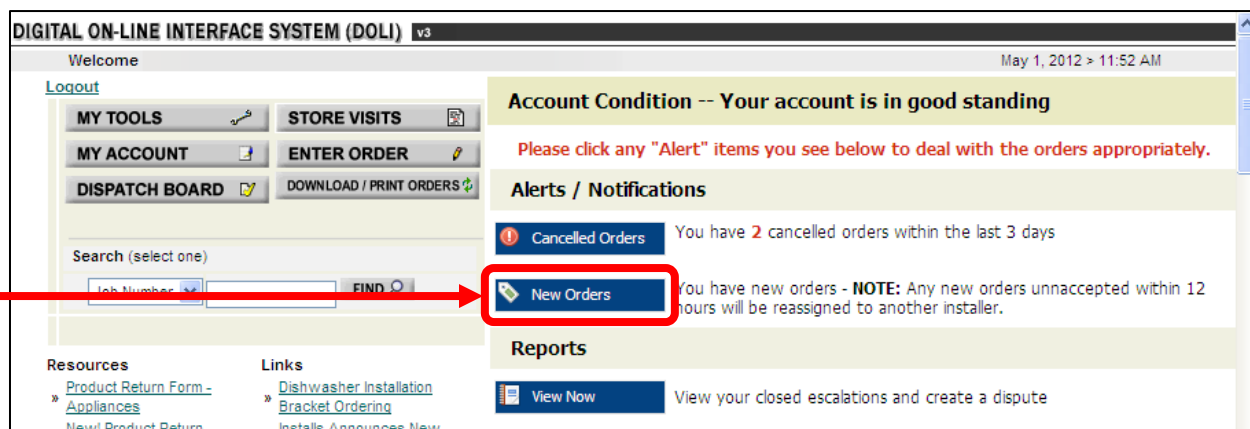
Note: This feature is covered in detail later in this document.

    f. **Closed Escalation Report:** Summary of closed escalations by the month in which they were closed.
    Figure 55
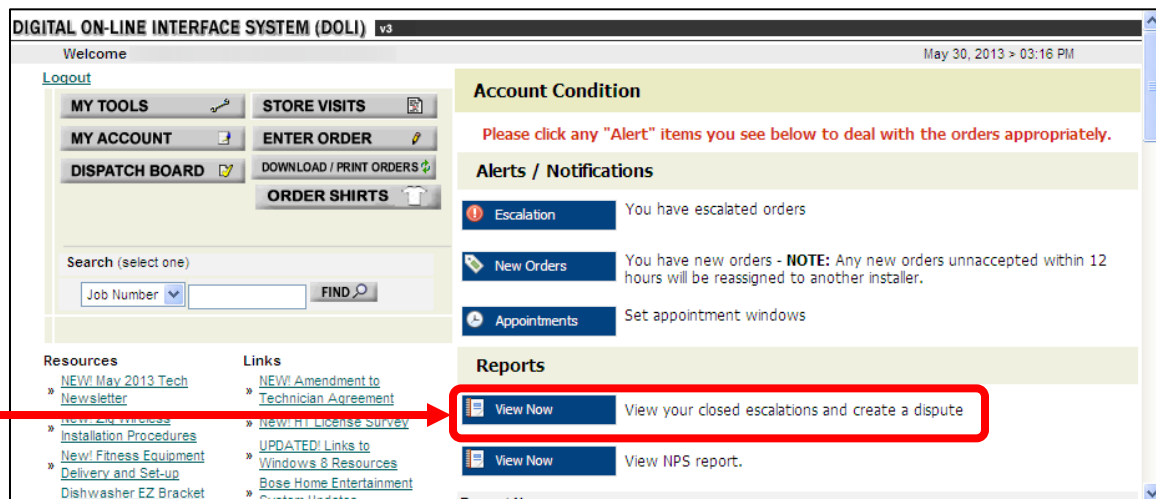
Note: This feature is covered in detail later in this document.

    g. **NPS Report:** Summary of your jobs on which customers completed the customer satisfaction survey.
        i. Under "Reports" on the DOLI homepage, click the second **View Now** button.
        Figure 56
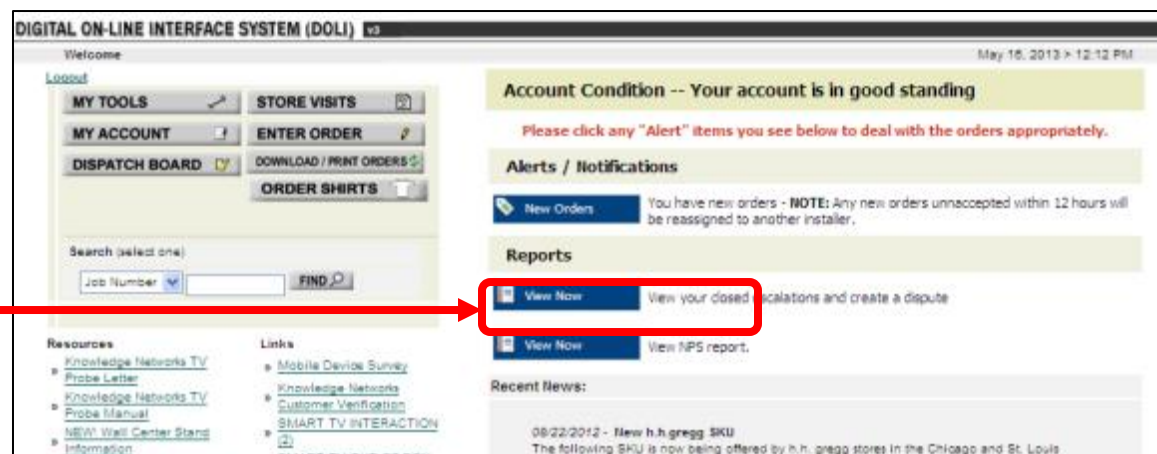
Note: This displays the *NPS Report*. The *NPS Report* is populated in real time.

        ii. To scroll from month to month, click the **Back** or **Forward** navigation button next to the month.

Figure 57

Note: The report includes the following columns:

Column	Purpose
Job Number	Original job number
Client	Name of the client original job was for
Technician Name	First and last name of the technician who completed the job
NPS Survey Date	Date the customer responded to the NPS survey
NPS Data	0-9 rating customer gave to the NPS survey question, "Please rate your service experience with the servicing technician"
Completion Date	Date job was completed
SKU	SKU for the job that was performed
Description	Description of SKU for the job that was performed

Store Visits: Documenting Visits to Client Stores

Note: Use the **STORE VISITS** function to document visits to client stores.

It is important for installers to visit client stores on a regular basis to build and maintain relationships with the store's management and sales staff. Document information collected during your visits in the **STORE VISITS** section of DOLI so that the data can be reported back to the client to ensure compliance.

1. On the DOLI homepage, click the **STORE VISITS** button.

Figure 58
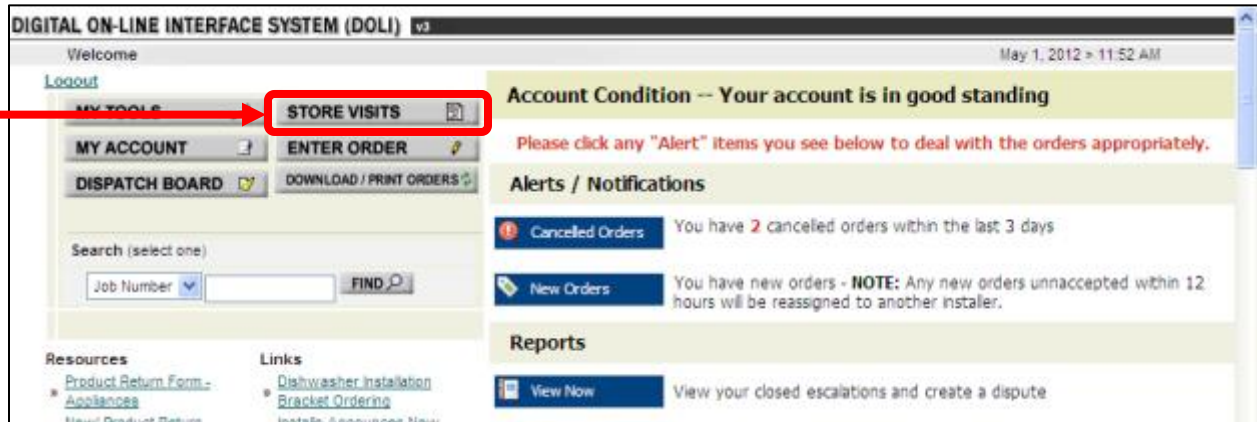
Note: This displays the *Retail Store Visits* screen.

Figure 59

2. From the **Company** drop-down list, select the client you visited.
3. From the **Store No.** drop-down list, select the store number you visited.
4. From the **Date Visit Scheduled** drop-down lists, select the month, date, and year of your store visit.

5. From the **Date Training Completed** fields, select the month, date, and year that in-store training was completed (if applicable).
6. Complete the **Title, First Name, and Last Name** fields with the name of the principle person you met with during your visit.
7. Document your meeting notes in the **Comments** field.
8. Click the **SUBMIT** button to save the store visit documentation.

MANAGING INSTALLS ORDERS IN DOLI

The principle function of DOLI is to manage Installs orders. This section outlines several important DOLI functions that allow you to effectively process your Installs orders.

Accepting All New Installs Orders

> **Note:** When new orders are routed to you, you will see the **New Orders** button on the DOLI homepage upon login. When orders are routed to you, you must formally review and accept them before they are actually "yours." Assigned orders that are not accepted within 12 hours will be reassigned to another installer.
>
> If you need to decline an order after accepting it, see the procedure for **Declining Accepted Installs Orders** later in this document.

1. On the DOLI homepage, click the **New Orders** button.

    Note: If you do not see the **New Orders** button, you have no new orders.

    Figure 60
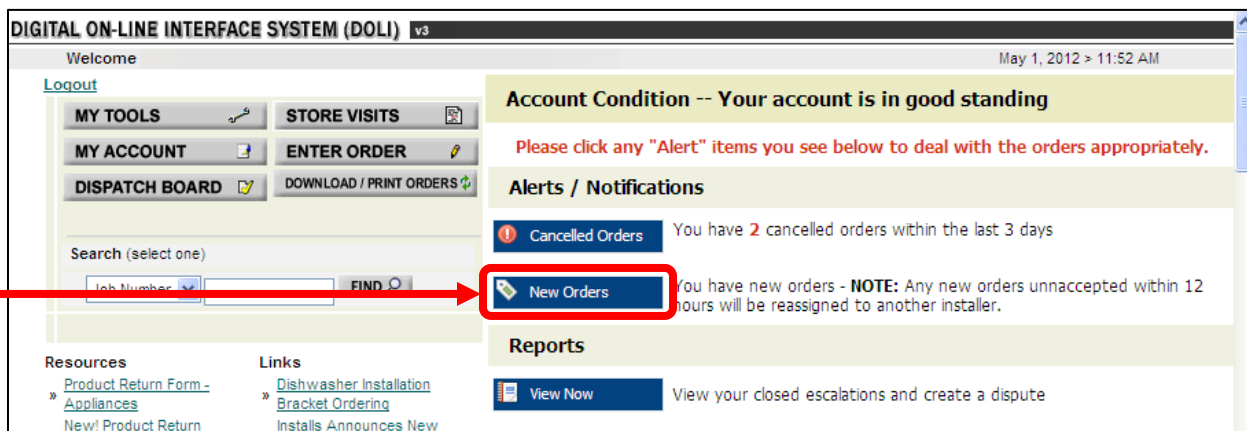
Note: This displays all pending orders for your review.

    Figure 61

2. To accept **ALL** orders, click the **Continue** button at the bottom of the page.

    Note: This accepts all pending orders and displays options for proceeding to your accepted orders.

Figure 62

3. Click the button corresponding to the next action you wish to take:

- **Print Accepted Orders:** Displays printable work orders for all accepted orders on one screen. Use the browser's print feature to print the work orders.
- **Download Accepted Orders:** Download a .txt file containing your orders.
- **Continue:** Displays the *My Orders* screen.

Declining New Installs Orders

Note: Use this procedure to decline a newly assigned job that you cannot accept.

1. On the DOLI homepage, click the yellow flashing **New Orders** button.
   Note: If you do not see the **New Orders** button, you have no new orders.

   Figure 63
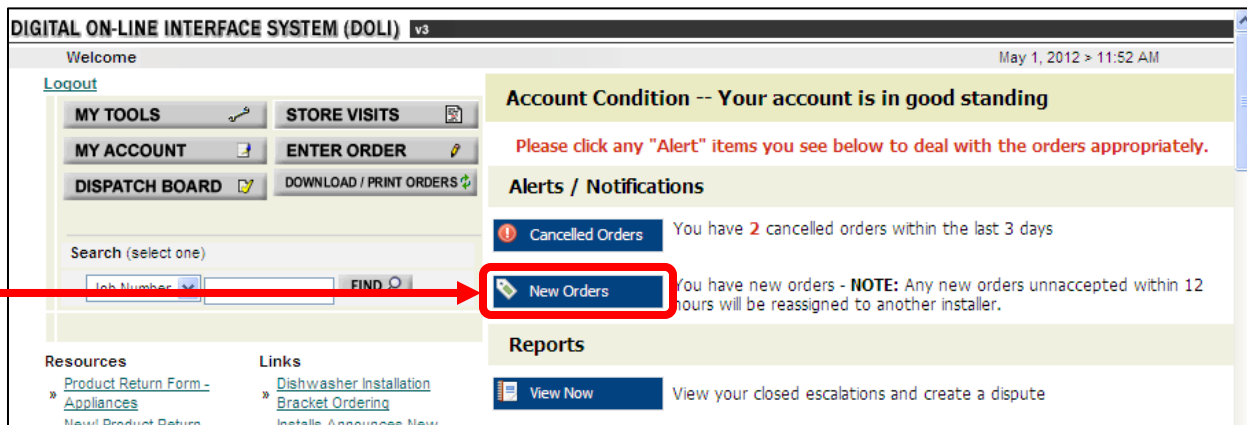
   Note: This displays all pending orders for your review.

2. Check the **Decline** checkbox corresponding to the order(s) you cannot accept.

   Figure 64

3. Click the **Continue** button at the bottom of the list.

   Note: This declines the order(s) you checked, accepts the other pending orders, and displays the *Reason for Declining* screen. You must document the reason you are declining the order(s) on this screen.

Figure 65
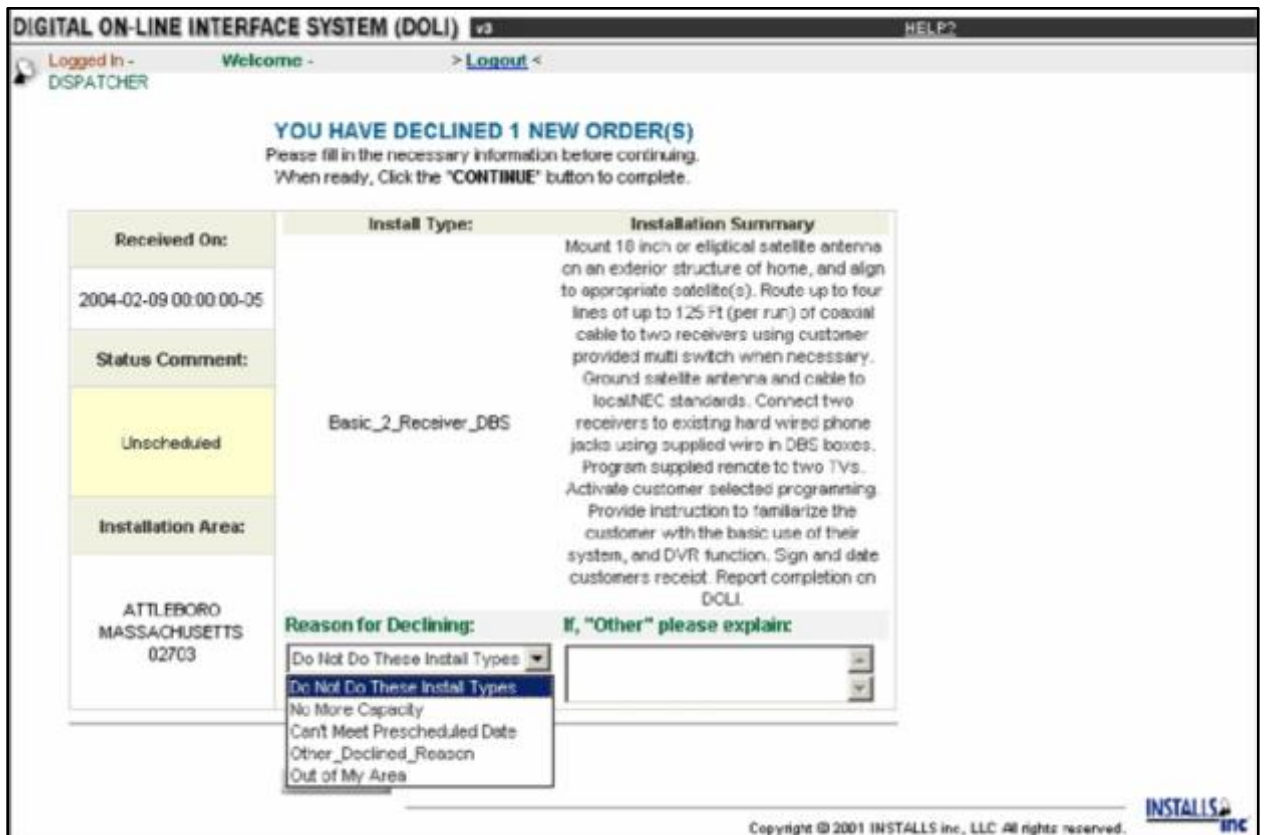
4. From the **Reason for Declining** drop-down list corresponding to the first declined order, select the reason you are unable to accept the job.

>   **Note:** If you select **Other_Declined_Reason**, type the reason in the **If "Other," please explain** text box. This will help us understand if your capacity, coverage, and skill sets need to be updated in DOLI, and if you are able to perform the job on an alternate date.
>
>   **If you decline multiple orders, you must scroll down on the *Reason for Declining* screen and select a reason for each order.**

5. When you have documented a reason for declining each order, click the **Continue** button at the bottom of the screen.

>   **Note:** This displays options for proceeding to your accepted orders.

Figure 66

6. Click the button corresponding to the next action you wish to take:

- **Print Accepted Orders:** Displays printable work orders for all accepted orders on one screen. Use the browser's print feature to print the work orders.
- **Download Accepted Orders:** Download a .txt file containing your orders.
- **Continue:** Displays the *My Orders* screen.

Declining Accepted Installs Orders

Note: Use this procedure if you must decline an order after you have accepted it.

1. Locate and select the order you wish to decline.
2. From the **Change Status** drop-down list, select **Need Installs Action**.
   Note: This displays the **Comment** drop-down list.

> **Figure 67**

a. From the **Comment** drop-down list, select **Declining Job – see notes**.
b. In the **Add/Edit Notes** field, document the reason you are declining the job.
c. Click the **SUBMIT** button.
   Note: This declines the job and updates the status of the order.
   Note: If the job's scheduled arrival window is within the next 24 hours, you must also call Installs at 1-888-490-4321.

Managing Escalated Installs Orders

Escalations Overview

Positive Escalations

Positive escalations occur when customers contact Installs with positive feedback about the technician or installation. Installs documents these compliments as escalations because we feel that it is important to record and notify you that customers are having positive experiences with your company and your technicians. Installs can also initiate positive escalations when you and/or your technicians go the extra mile to ensure that Installs jobs are completed.

Negative Escalations

When a work order is not completed as assigned or expected Installs utilizes an escalation process to ensure that the issue is met with an immediate response. Resolution of an escalation depends on the nature and/or origin of the escalation. Below are some frequently asked questions about negative order escalations:

What is a negative escalation?

An escalation is a ticket created by Installs or clients in DOLI to collect information about a job-related incident.

How does a negative escalation get opened?

When a complaint or problem with a job is reported to Installs by a customer, by a client, or by an internal associate, we open an escalation as a mechanism for tracking the issue. We always err on the side of caution by opening escalations when problems are reported. Escalations can be opened before, during, or after the job.

What does Installs do when a negative escalation is opened?

Installs/the client opens an escalation on the job in DOLI, so you have visibility to it from the very beginning. Installs conducts research on every reported issue before reaching any conclusions, determining responsibility, and deciding on the corrective course of action. Installs will contact you when an escalation is opened on one of your jobs.

What should I do when a negative escalation is opened on one of my jobs?

It is VERY IMPORTANT that you respond to Installs' requests for information about open escalations as quickly and efficiently as possible. Input from you is a vital part of the investigation process and provides you an opportunity to tell us about the incident from your point of view.

Installs works on escalations in the order they are opened, or by severity of the complaint. Best practice recommendation is that you enter your job notes in DOLI and upload all forms and/or pictures associated with job as soon as the escalation ticket is opened, if you have not already done so.

If you do not respond to Installs' request for information regarding an escalation within 24 hours of our first attempt to contact you, Installs will resolve the escalation with the customer, using the course of action we find most appropriate. The escalation may be closed against you, and a penalty or other corrective action may be assessed.

What happens when a negative escalation is closed on one of my jobs?

If Installs' research indicates that you (the installer company and/or the technician) are not responsible for the reported problem, you do not need to take any action. Installs will update and close the escalation in DOLI with no impact to you, and follow up with any other involved parties (e.g., customer, client, insurance company, etc.).

However, if Installs' research indicates that the installer company or technician is ultimately responsible for the issue, we will close the escalation against your company, which may lead to a financial penalty or other corrective action assessed to you.

What are the reasons a negative escalation can be closed against my company?

When Installs closes an escalation, an "escalation close reason" is applied. Example escalation close reasons include:

- Technician – Tech No Call No Show
- Technician – Short Notice
- Technician – Missed Appointment Window
- Tech Company – Failure to Update DOLI
- Tech Company – Refusal to Warranty
- Tech Company – Provided Defective Equipment
- Technician – Damage to Property
- Technician – Substandard Installation
- Technician – Unprofessional – Did Not Follow Process
- Unresponsive
- Technician – Unprofessional – Behavior

All of the escalation close reasons above carry a follow up action. For some escalation close reasons, your company will be assessed a financial penalty; for some, your company will be charged the dollar amount required to correct the issue; and for others, your company will undergo a contract review to determine if your company will be permitted to maintain its current position with Installs. See "Appendix I: Escalation Status Definitions and Assessments" section of this document for details.

What if I disagree with Installs' findings about a negative escalation?

If you disagree with Installs' conclusion that your company is responsible for the reported issue and any actions or costs associated with resolving it, you can dispute the decision after the escalation is closed. Disputes of closed escalations are accepted from the 1st to the 14th of the month *after* the escalation was closed. For example, if an escalation was closed on March 20, 2013, you can log your dispute from April 1-14, 2013. Log all disputes via the *Closed Escalation Report* in DOLI (see the "Closed Escalation Disputes" section of this document for instructions).

How do I avoid negative escalations?

The best way to minimize escalations is to complete all Installs events with the highest levels of punctuality, professionalism, accuracy, workmanship, courtesy, customer service, and respect.

Escalation Open Reasons

| POSITIVE ESCALATION OPEN REASONS	DEFINITION
Compliments	The customer called with positive feedback about the technician or installation
Covered Job	The technician/installer company agreed to cover a job on short notice, out of their coverage area, or on their day off
Improved Experience	The customer indicated a better experience over the previous installation job
Went Above and Beyond	The customer indicated that the technician or installer company out of their way to accommodate the customer or the job
NEGATIVE ESCALATION OPEN REASONS	**DEFINITION**
Customer Unhappy With Service	Customer reports dissatisfaction with services by calling Installs by responding "dissatisfied" to Installs' follow-up survey after their appointment window.
Damage to Property	Installs receives a report that there was damage to the customer's property/product caused by or during the services.
Failure to Follow Process	Installs receives a report that the technician did not follow process (dress code, no estimated time of arrival given, tech collected monies from customer without prior approval, or technician took equipment offsite when not outlined in SOW, etc.).
Missed Appointment	Installs receives a report from the client/customer that the technician arrived after the appointment window ended.
Missing/Damaged Equipment – Client Provided	Installs receives a report that the equipment the client provided to the customer is missing and has never been returned and/or has been damaged.
For Tracking Purposes Only	Installs is opening a ticket to track an existing complaint on another order.
High Priority	Installs has received a report from our client's corporate office that requires immediate follow up.

Escalation Close Reasons

ESCALATION CLOSED REASONS	PENALTY CHARGED IF	ASSESSMENT
Technician – Tech No Call No Show	You did not show up for the accepted job as scheduled AND you did not notify Installs that you were not going to make the appointment	SKU rate
Technician – Short Notice	You declined a previously accepted job (via DOLI or phone call to Installs) after 4:00pm local time the day before the job was scheduled	$25
Technician – Missed Appointment Window	You arrived for a job after the appointment window by end time.	$15
Tech Company – Failure to Update DOLI	• You did not **upload completed Consultation Forms** to DOLI the **SAME DAY** you performed the consult. *OR* • You did not **update or close out jobs** in DOLI within **THREE (3) DAYS** of the appointment.	$25
Tech Company – Refusal To Warranty	Installer company refuses to warranty their installation (1 Year)	Costs to correct issue
Tech Company – Provided Defective Equipment	Installer company provided the customer with defective equipment; excludes equipment provided by client and Installs.	Costs to correct issue
Technician – Damage To Property	Technician caused damage to customer's property/product.	Costs to correct issue
Technician – Substandard Installation	Technician's installation was not completed to professional standards of quality	Costs to correct issue
Technician – Unprofessional – DID NOT FOLLOW PROCESS	Technician did not follow process (Did not give an estimated time of arrival, tech collected monies from customer, took equipment offsite, etc.)	Costs to correct issue
Unresponsive	You did not respond to Installs within 24 business hours of the initial message from Installs about an opened escalation	Contract Review
Technician – Unprofessional – BEHAVIOR	Technician did not demonstrate professional behavior while onsite	Contract Review

Viewing Orders with Open Escalations

1. On the DOLI homepage, click the **Escalation** button.

   Note: If you do not see the **Escalation** button, you have no new escalations.

   Figure 68
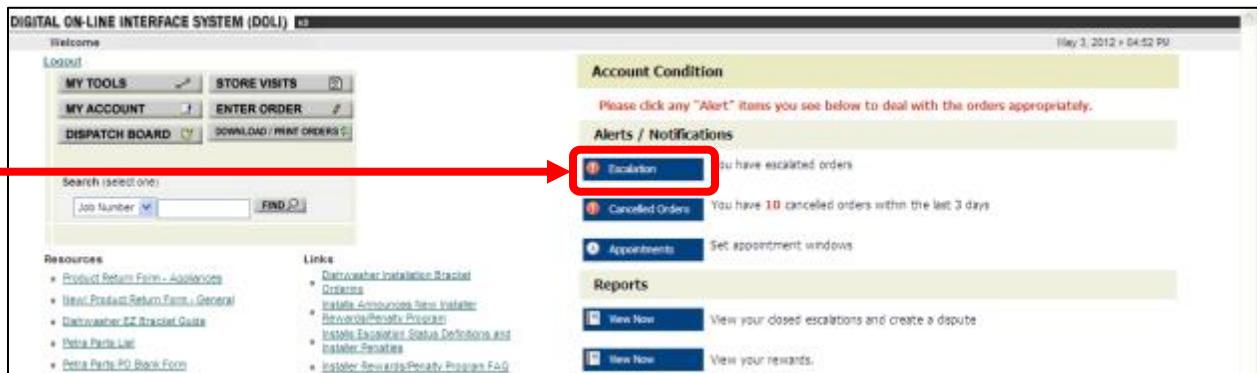
   Note: This displays your escalated orders on the right side of the screen.

2. To view an escalated order, click the name on the order in the list on the right side of the screen.

   Note: This displays the order details in the main portion of the screen.

   Figure 69

3. Review all escalation notes and job notes associated with the order to ensure that you are informed about the issue.

Updating Escalated Installs Orders

1. Locate and select the order you wish to update.
2. In the **Add/Edit Notes** text box, enter your notes.

   Figure 70

3. Click the **SUBMIT** button.
4. Repeat the steps above to update all necessary orders.
5. Once you have made all necessary reviews and updates, click the **FINISHED UPDATING** button.

   Figure 71

Note: This returns you to the DOLI homepage.

Viewing Closed Escalated Installs Orders

Note: The *Closed Escalation Report* on your DOLI homepage displays a summary of closed escalations by the month in which they were closed. The information displayed on this screen varies, depending on the month you are reviewing. The report also includes access to the Closed Escalation Dispute function, which we will explain in this procedure.

Accessing the Closed Escalation Report

1. Under "Reports" on the DOLI homepage, click the first View Now button.

   Figure 72
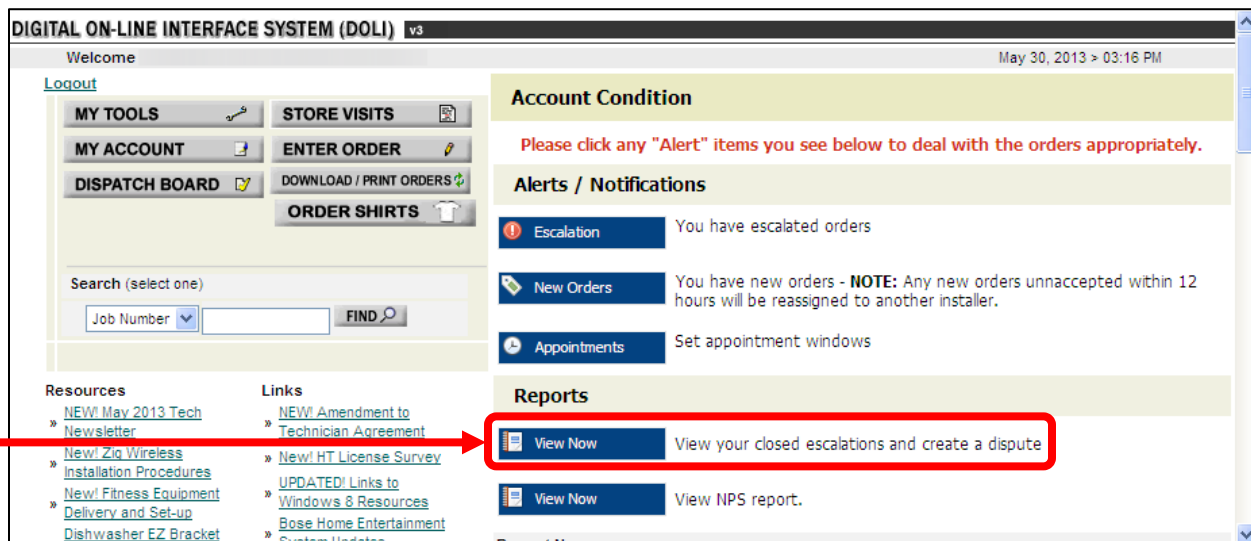
Note: This displays your *Closed Escalation Report* for the current month. Escalations are displayed on the report for the month in which they are **closed**, which may not be the same month in which they are opened. The report is populated in real-time.

2. To scroll from month to month on the report, click the Back or Forward navigation buttons next to the month.

   Figure 73

Current Month

Note: When you view the report for the **CURRENT MONTH**, you will see the following screen outlining escalations that have been closed so far this month:

Figure 74

Note: The **CURRENT MONTH** report includes the following columns:

Column	Purpose
Ticket ID	Hyperlink to job; click to review job and all related notes in DOLI.
Job Number	Original job number.
Client	Name of the client original job was for.
Customer Name	First and last name of the customer on the original job.
State	Customer's state.
Escalation Type	Original type of escalation/reason escalation was opened.
Closed Reason	Final reason assigned to escalation upon closure by Installs, based on research by the Installs Client Resolution department. Hold your cursor over the hyperlinked text to view a brief description of the escalation close reason.
Potential Penalty Amount	The penalty amount the installer may be charged for the escalation if it is determined that the installer/technician is responsible for the escalation.

Past Months *(two or more months ago)*

Note: When you view the report for **PAST MONTHS** (two or more months ago), you will see the following screen:

Figure 75

Note: The **PAST MONTHS** report includes the following columns:

Column	Purpose
Ticket ID	Hyperlink to job; click to review job and all related notes in DOLI
	If a **View Logs** link appears next to a static (no hyperlink) Ticket ID, the job has been reassigned to a different installer for completion or correction. Instead of opening the job in DOLI, clicking the **View Logs** link displays the Escalation Log and Order History Log, which outline all actions and notes from the order while the job was assigned to you. You will not see any notes or activity on the job after it was reassigned to a different installer.
Job Number	Original job number.
Client	Name of the client original job was for.
Customer Name	First and last name of the customer on the original job.
State	Customer's state.
Escalation Type	Original type of escalation/reason escalation was opened.
Closed Reason	Final reason assigned to escalation upon closure by Installs, based on research by the Installs Client Resolution department. Hold your cursor over the hyperlinked text to view a brief description of the escalation close reason.
Potential Penalty Amount	The penalty amount the installer was eligible to be charged for the escalation if it was determined that the installer/technician was responsible for the escalation.
Dispute	Escalations from past months cannot be disputed; the message **Not Eligible to Dispute** is displayed.

Last Month

Note: When you view the report for the **PREVIOUS MONTH** (last month), you will see the following screen:

Figure 76

Note: The **PREVIOUS MONTH** report includes the following columns:

Column	Purpose
Ticket ID	Hyperlink to job; click to review job and all related notes in DOLI
	If a **View Logs** link appears next to a static (no hyperlink) Ticket ID, the job has been reassigned to a different installer for completion or correction. Instead of opening the job in DOLI, clicking the **View Logs** link displays the Escalation Log and Order History Log, which outline all actions and notes from the order while the job was assigned to you. You will not see any notes or activity on the job after it was reassigned to a different installer.
Job Number	Original job number.
Client	Name of the client original job was for.
Customer Name	First and last name of the customer on the original job.
State	Customer's state.
Escalation Type	Original type of escalation/reason escalation was opened.
Closed Reason	Final reason assigned to escalation upon closure by Installs, based on research by the Installs Client Resolution department. Hold your cursor over the hyperlinked text to view a brief description of the escalation close reason.
Potential Penalty Amount	The penalty amount the installer will be charged for the escalation if it is determined that the installer/technician is responsible for the escalation.
Dispute	• If the escalation is eligible to be disputed, the **Dispute** button is displayed. • If Installs is reviewing the escalation based on installer's previous request for dispute, the **In Review** button is displayed. • If the escalation was disputed by the installer and the dispute was accepted by Installs, the **Accepted** button is displayed. • If the escalation was disputed by the installer and the dispute was rejected by Installs, the **Rejected** button is displayed. • If the escalation is no longer eligible for dispute, **Not Eligible to Dispute** is displayed.

Disputing an Escalation

Note: The following parameters apply to closed escalation disputes:

- Installers can dispute escalations that were closed during the previous month only.
    - Installers have from the 1st to the 14th of each month to dispute escalations closed during the previous month.
    - Escalations closed during the current month cannot be disputed until the 1st of the next month.
    - Escalations closed during past months can no longer be disputed.
- The Installs Client Resolution department will conclude investigation activities and resolve all closed escalation disputes by the 21st of each month. Disputed closed escalations will be resolved as **Accepted** (dispute accepted; no penalty charged to installer) or **Rejected** (dispute rejected; installer responsible to pay penalty), based on the information and evidence available.

Note: If you see the message **Not Eligbile to Dispute** in the **Dispute** column, the escalation is closed and can no longer be disputed because it is either not from the previous month, or the escalation is from the previous month but the dispute window is closed (i.e., today's date is after the 14th).

Figure 77

To dispute an escalation closed during the <u>PREVIOUS MONTH</u>, perform the following steps:

1. Between the 1st and 14th of the month after the escalation was closed, click the **Dispute** button corresponding to the closed escalation you wish to dispute.

Figure 78

Note: This displays the *Closed Escalation Dispute Form*. The **Ticket ID**, **Client**, **State**, **Date Opened**, **Job Number**, **Customer Name**, **Escalated By**, **Escalation Type**, and **Escalation Reason** fields are auto-populated.

2. In the text field on form, enter the details of your dispute claim.
3. Click the **Submit** button.

Figure 79

Note: This changes the **Dispute** status to **In Review**.

4. To review or update notes related to the dispute any time, click the In Review button.

Figure 80

Note: This displays any notes the installer or the Installs Client Resolution department has made related to the closed escalation dispute. Job notes and original escalation notes are not displayed here; go to the job in DOLI to review such notes.

5. The Installs Client Resolution department reviews the dispute and performs the necessary research. The Installs Escalations Team may contact you for additional information regarding the closed escalation dispute.

Note: The Installs Client Resolution department researches and resolves all closed escalation disputes by the 21st of each month. If the Installs Client Resolution department contacts you or asks you to provide documentation, information, etc., it is in your best interest to reply and supply the requested materials as quickly as possible.

6. When the Installs Client Resolution department resolves a closed escalation dispute, they update the Dispute status to either Accepted or Rejected.

   a. **Accepted:** A closed escalation **Dispute** status of **Accepted** means that the installer has provided sufficient evidence to prove to Installs that the installer/technician was not responsible for the issue documented in the escalation. The installer **will not be charged** a penalty for the escalation.

Figure 81

b. **Rejected:** A closed escalation **Dispute** status of **Rejected** means that the evidence provided indicates to Installs that the installer/technician was responsible for the issue documented in the original escalation. The installer **will be charged** a penalty for the escalation.
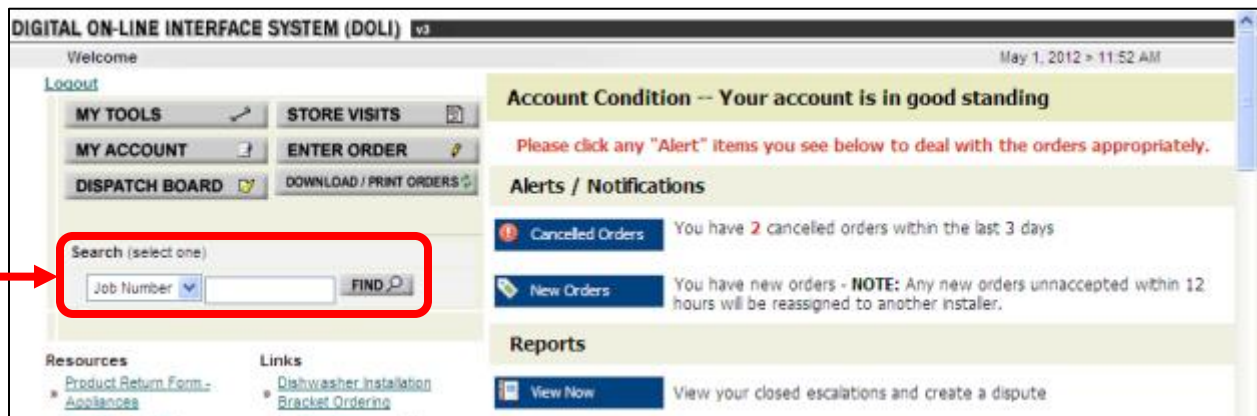
Figure 82

Note: See Appendix II of this document for the "Escalation Status Definitions and Assessments" table.

Search: Searching for Orders in DOLI

Note: Use the **SEARCH** function to search for orders using several different criteria.

1. On the DOLI homepage, locate the **SEARCH** box on the Main Navigation Bar.

   Figure 83

2. From the **Search** drop-down list, select the type of search criteria you wish to use:
   - **Phone:** Customer phone number
   - **Job Number:** Installs job number
   - **Zip:** Customer ZIP code
   - **Last Name:** Customer last name
   - ***Phone:** Partial customer phone number
3. In the **Search** input field, type your search criteria.
4. Click the **FIND** button.

   Note: This displays the order matching the specified search criteria.

   If multiple orders meet the search criteria, they will be listed on the right side of the screen. To view an order from the list, click the hyperlinked customer name on the desired order.

   Figure 84
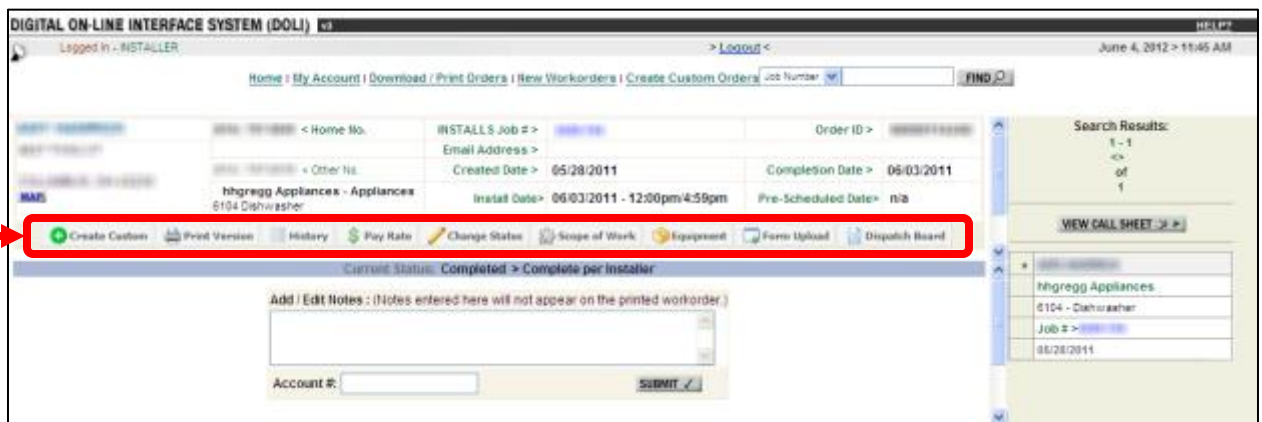
   Note the Order Tool Bar in the middle of the screen (you may need to use the frame scroll bar to view it). The Order Tool Bar offers several functions that are imperative to managing the work order, which are outlined in the following procedures.
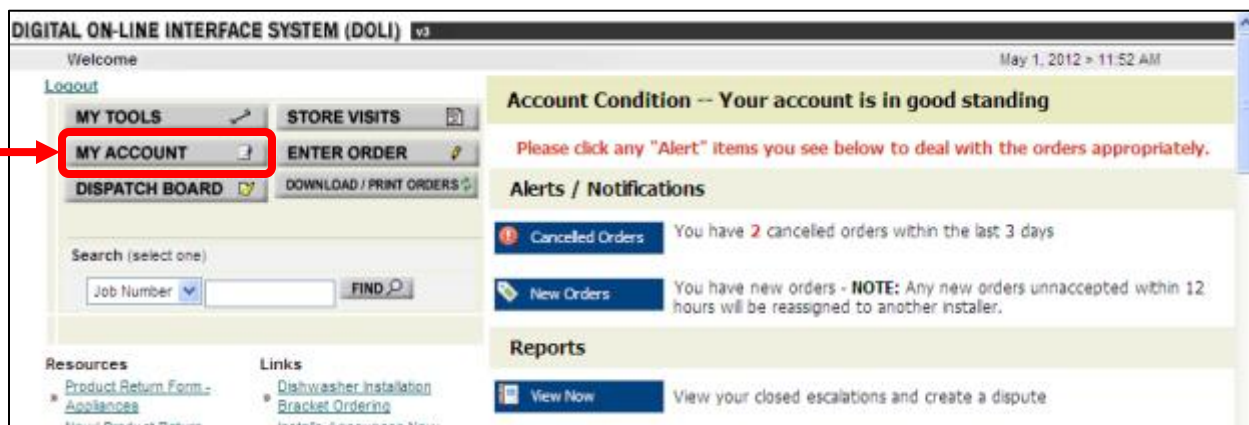
My Account: Accessing Your Orders

Note: Use the **MY ACCOUNT** function to view the status of your orders.

This is a very important feature, as it provides you with live reporting on the status of your orders, including the number of orders in each status.

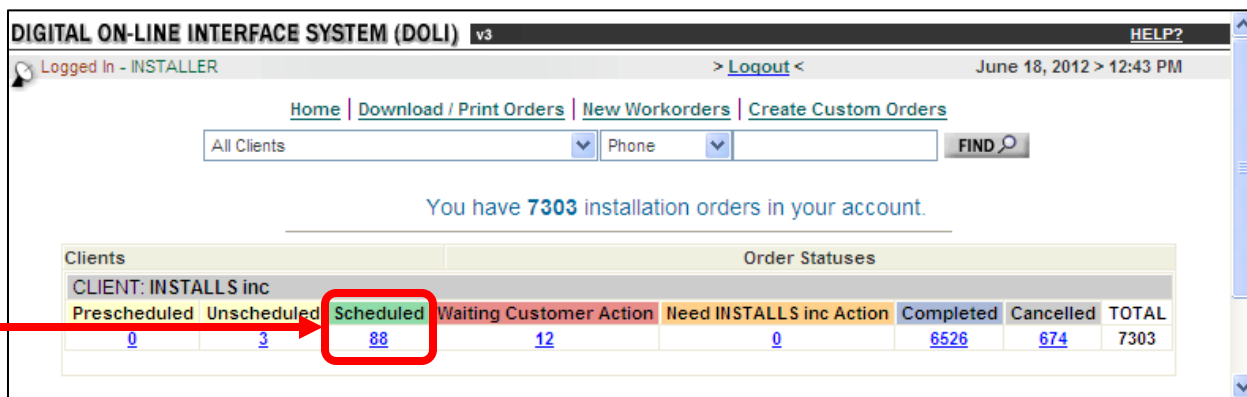1. On the DOLI homepage, click the **MY ACCOUNT** button.

   Figure 85

Note: This displays the *My Orders* screen.

The hyperlinked number that appears below each color-coded status indicates the number of orders currently in that status. In the example below, there are 88 orders in the status of "Scheduled."
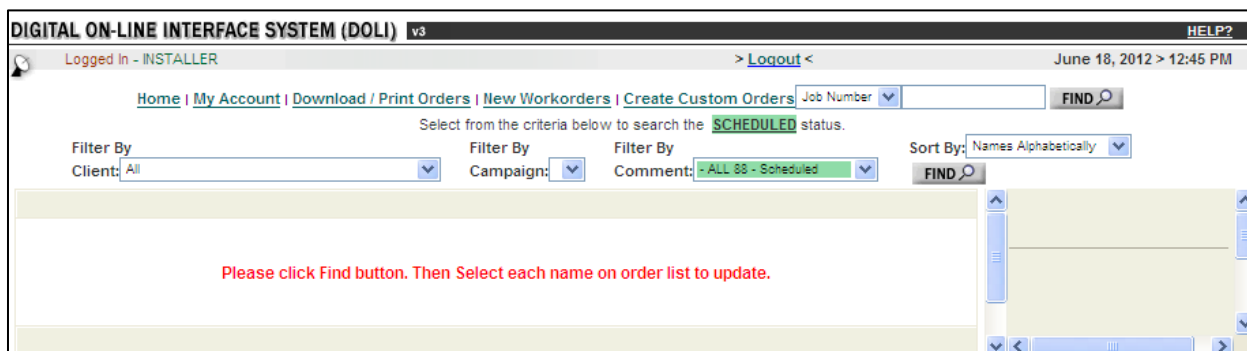
Figure 86

2. To view orders in a specific status, click the hyperlinked number below the status.

   **Note:** This opens the *Status* screen.

   Figure 87

3. To further refine your orders search, perform the following steps:

a. From the **Filter by Client** drop-down list, select the client for which you want to see orders.

b. From the **Filter by Campaign** drop-down list, select the campaign for which you want to see orders.

   Note: In order to filter by Campaign, you must first filter by Client.

c. From the **Filter By Comment** drop-down list, select the specific orders status comment for which you wish to search.

   Note: To view all orders within a status without filtering, select the "- ALL ## - Status" option from the **Filter By Comment** drop-down list.

d. From the **Sort By** drop-down list, select the desired sort criteria for your search results.

   Note: Sort options include Names Alphabetically, Oldest to Newest Date, and Newest to Oldest Date.

   Figure 88
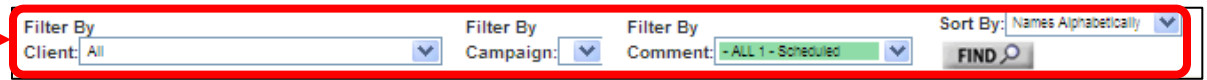
e. Click the **FIND** button.

   Note: This displays the orders meeting your search criteria on the right side of the screen.

f. To view a summary of an order in the main panel of the screen, click the hyperlinked customer name on the order in the list on the right side of the screen.
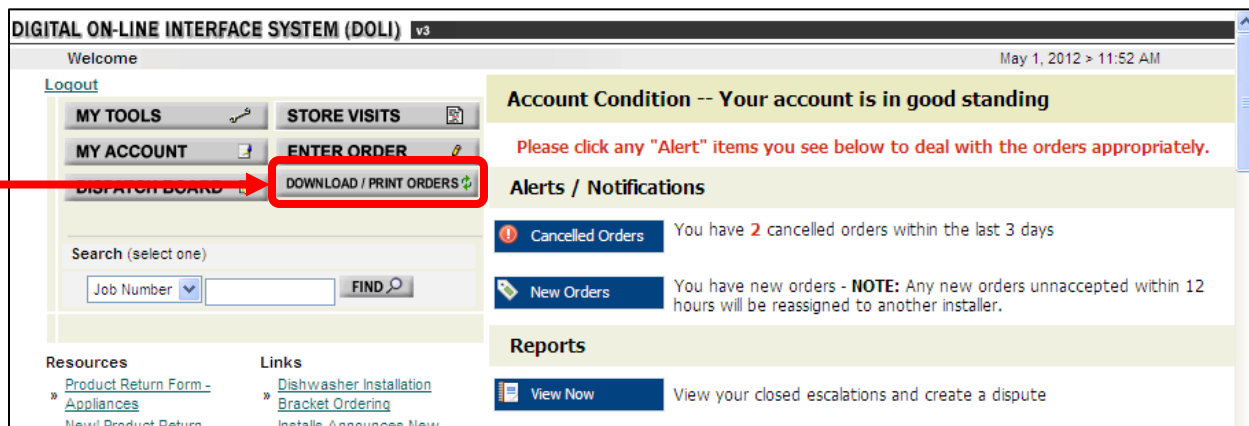
   Figure 89
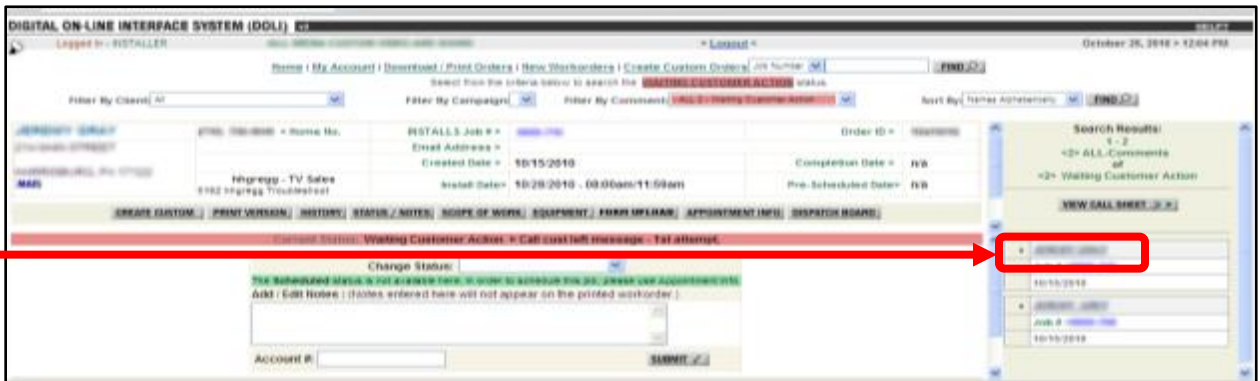
Download/Print Orders: Downloading and Printing Multiple Orders

Note: Use the **DOWNLOAD/PRINT ORDERS** feature to view or save a .txt file containing data about your orders. You can view or print current orders assigned to you or past completed work.
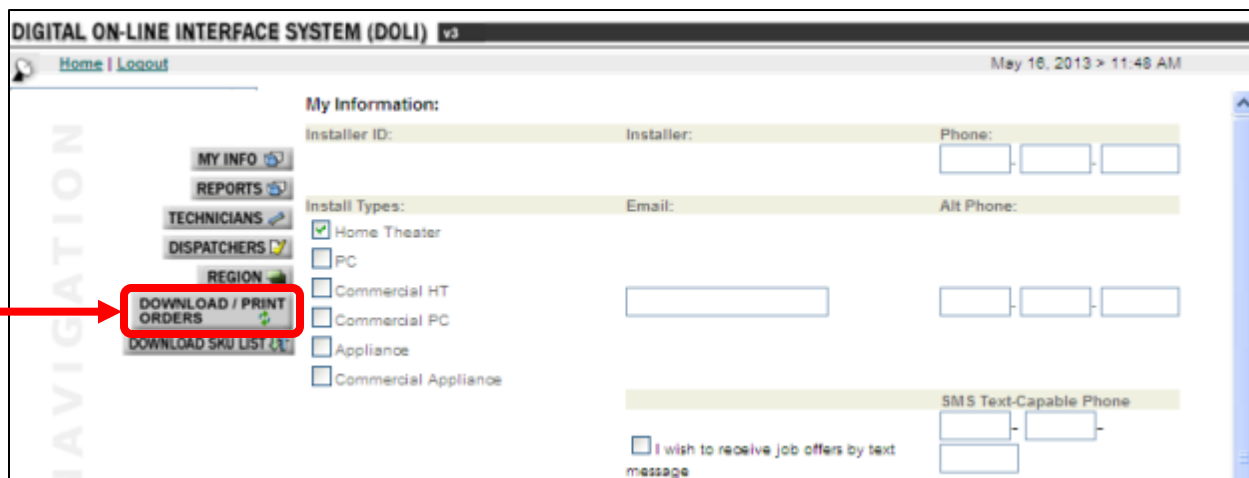
The **DOWNLOAD/PRINT ORDERS** function can be accessed via the Main Navigation bar on the DOLI homepage or from the navigation menu within **MY TOOLS**.

1. From the DOLI homepage or from **MY TOOLS**, click the **DOWNLOAD/PRINT ORDERS** button.

Figure 90

OR

Note: This opens the *Download/Print Orders* screen.

Figure 91

2. This screen offers three options for obtaining orders:
    a. **Option 1:** Click the **PRINT VERSION** button to print all recently accepted orders; click the **EXPORT VERSION** button to download and export a file outlining all recently accepted orders.
        i. Follow the prompts to save the downloaded file.
    b. **Option 2:** Obtain orders within a specific date range:
        i. In the **From** section, specify the starting Month, Date, and Year of the desired range using the fields provided.
        ii. In the **To** section, specify the ending Month, Date, and Year of the desired range using the fields provided.
        iii. To print the orders within the specified date range, click the **PRINT VERSION** button; to download and export a file outlining orders within the specified date range, click the **EXPORT VERSION** button.
            • Follow the prompts to save the downloaded file.
    c. **Option 3:** Click the **EXPORT VERSION** button to download a tab delimited .txt file outlining all custom orders.
        i. Follow the prompts to save the downloaded file.
   ii. Save the file to the desired location on your computer/network.
            Note: You can then open the saved file using Microsoft Excel, Access, or other spreadsheet/database program.

Print Version: Printing a Single Work Order

Note: Use the **PRINT VERSION** function to print a single work order. This is the paperwork that should be signed by the customer upon completion of the installation.

1. Locate the desired order.
2. Click the **PRINT VERSION** button on the Order Tool Bar.

   Figure 92
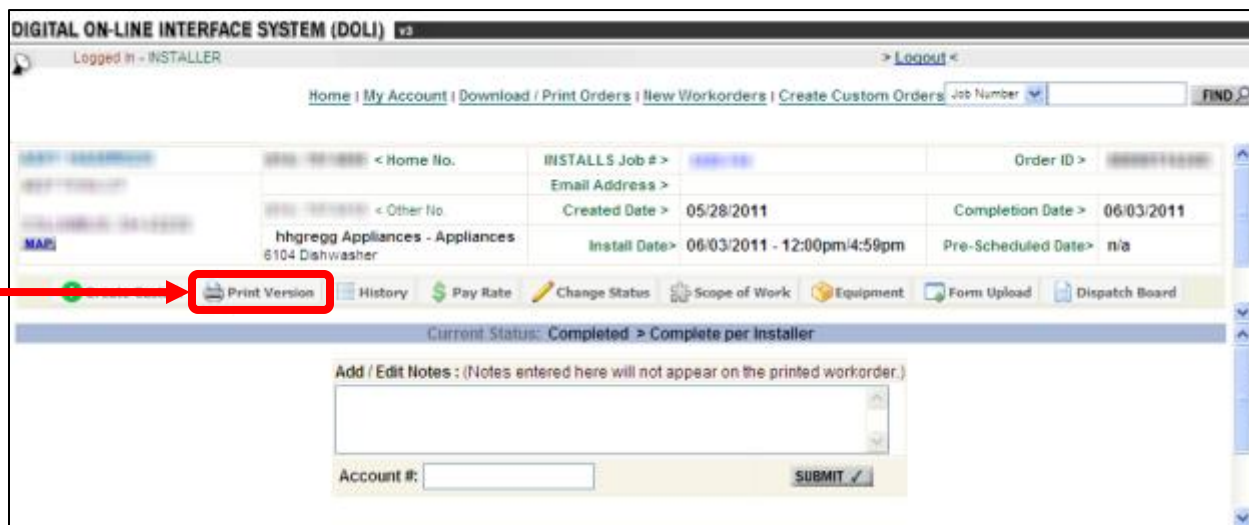
Note: This displays the client-specific paperwork which may include forms and a questionnaire in addition to the *Installs Installation Work Order* for the job.
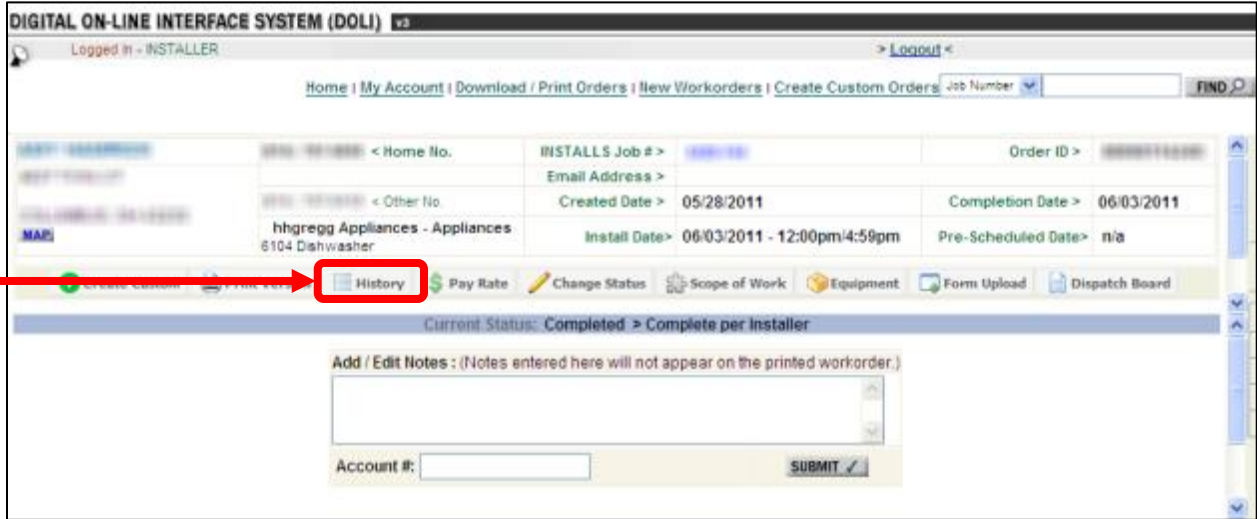
   Figure 93

3. Use the browser's print functions to print the work order.

History: Viewing the History of a Single Order

Note: Use the **HISTORY** function to review all notes associated with the selected order.
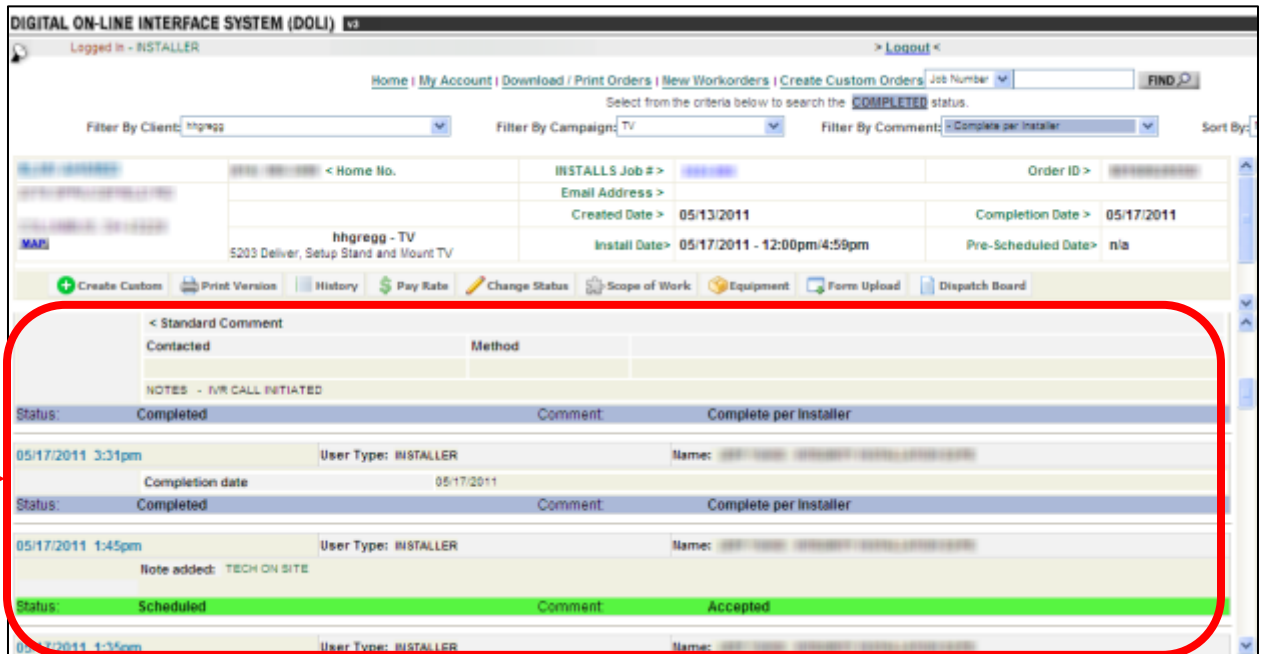
1. Locate the desired order.
2. Click the **HISTORY** button on the Order Tool Bar.

Figure 94

Note: This displays the history of the order in the bottom portion of the screen, including all notes and status changes that have been made on the work order.

Figure 95

# Pay Rate: Viewing SKU Rates on a Job

Note: This feature allows you to view the rates for SKUs on a specific job by pulling up the job in DOLI. See the "Download SKU List: Viewing SKU Rates and Scopes of Work" section of this document for more information on viewing SKU rates at the administrative level.

Rates are not visible in the Technician view of DOLI; only users logging in with your administrative DOLI username and password will be able to view rates in DOLI.

Note: The rates displayed in this document are for demonstration purposes only, and do not reflect the actual rate paid on any SKU to any installer.
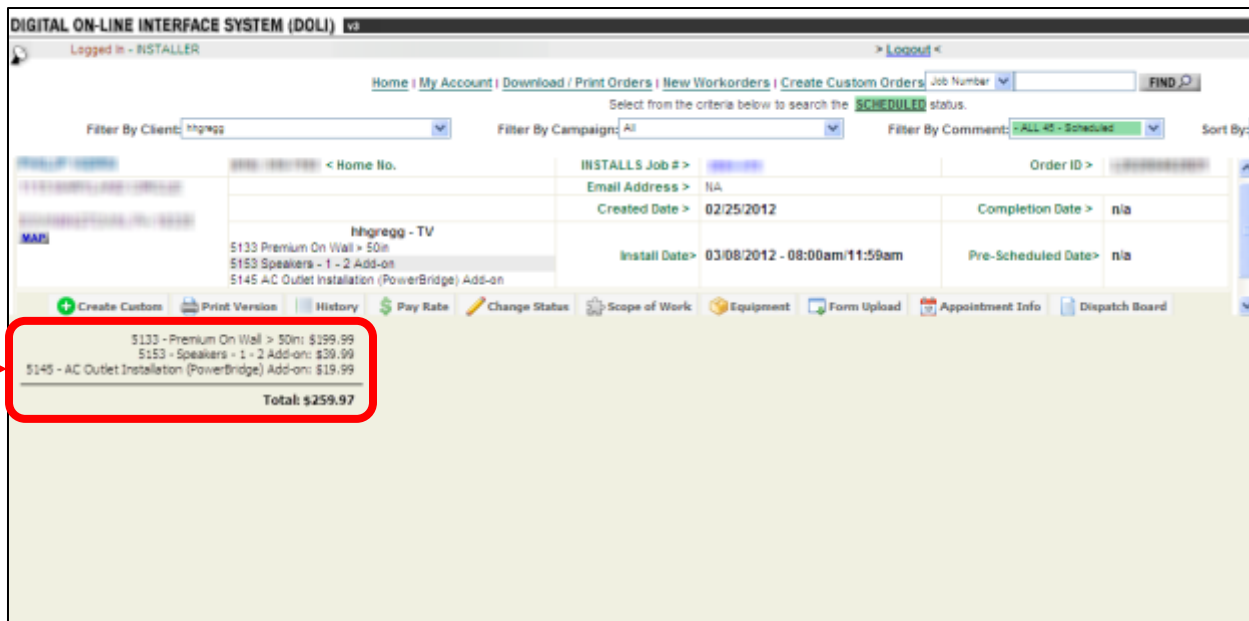
1. In DOLI, locate the job for which you wish to view rates.
2. Click the **Pay Rate** button on the Order Tool Bar.

    Figure 96
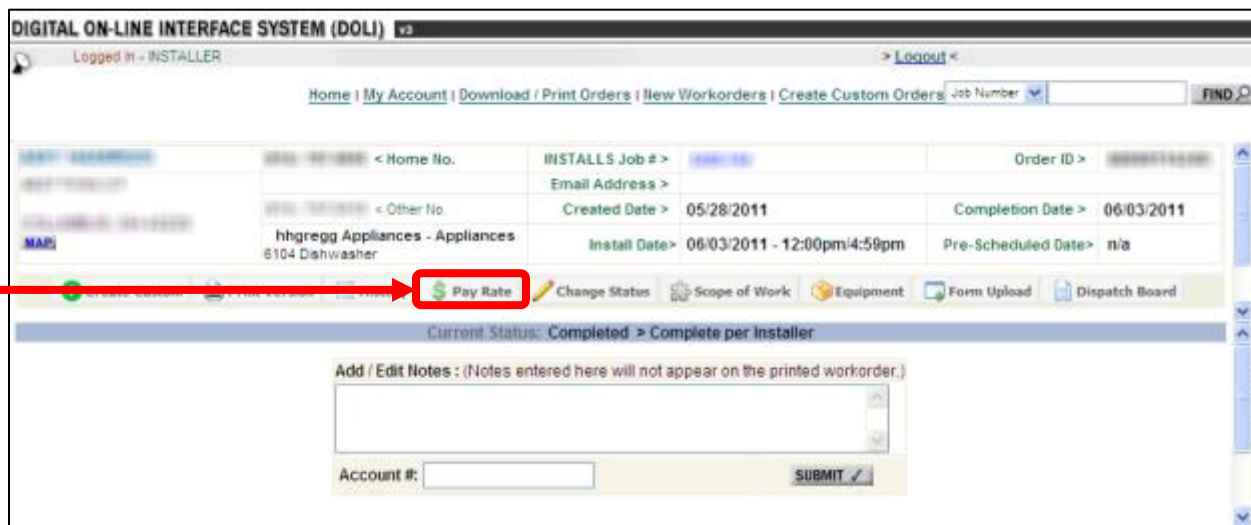
    Note: This displays your pay rate for each SKU on the job and the combined total.

    Figure 97

# Status/Notes: Updating Status/Notes on a Single Order

Note: Use the **STATUS/NOTES** function to update a work order to the proper status and enter any necessary comments.

1. Locate the desired order.
2. To change the status of an order, perform the following steps:

    Note: There are several statuses and status comments available in DOLI, but installers and technicians should only use the ones outlined below:

    a. From the **Change Status** drop-down list, select the desired new status.

    Figure 98
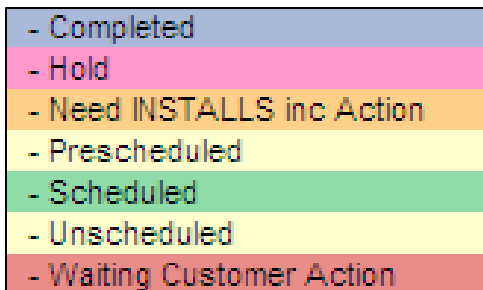
    b. From the **Comment** drop-down list, select the comment that best describes the current status of the order.

    Note: The status and status comments installers should use are:

    - **Status = Completed, Comment = Completed per SOW:** You completed the Scope of Work (SOW); the job is done.

    Figure 99

    Note: Use the **Completed** status with the **Completed per SOW** comment **ONLY** if you completed the **ENTIRE** Scope of Work (SOW) for the job. If you performed **PART** of the SOW on a job, but are not able to complete the entire SOW for any reason, you **MUST** call Installs from onsite to have an agent enter notes on the situation and update the job with the appropriate status and status comment. This applies to jobs for all clients.

- **Status = Need INSTALLS inc Action, Comment = Declining Job – see Notes:** Use this status if you have accepted a job that you now cannot perform. Provide details in **Notes** window. If it is less than 24 hours before the scheduled appointment, also call Installs so we can reset expectations with the customer.

  Figure 100

- **Status = Need INSTALLS inc Action, Comment = Job Description Issue:** Use this status if the customer presents any issues that prevent you from completing the job as outlined (e.g., customer misunderstood SOW; customer expectations) or as scheduled (e.g., customer wants to move appointment). Provide details in **Notes** window. If the issue is brought to your attention less than 24 hours before the scheduled appointment or while onsite, also call Installs so we can immediately address the issue.

  Figure 101

- **Status = Scheduled, Comment = Service Confirmed:** Use this status when you confirm an accepted job the day before the scheduled appointment.

  Figure 102

- **Status = Scheduled, Comment = Accepted:** Use this status when you confirm an accepted job after dispatch time, up through the scheduled appointment time.

Figure 103

c. If applicable, from the **Completion Date** drop-down lists, select the month, date, and year you are updating the status.

d. Enter any comments related to the status change in the **Add/Edit Notes** field.

   Note: You can enter notes on a work order without changing the status of the order. Installs recommends that you document all pertinent information related to the order, even when you are not updating the status.

   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.

e. Click the **SUBMIT** button to save the status change and/or notes.

Scope of Work: Viewing the Scope of Work for a Single Order

Note: Use the **SCOPE OF WORK** function to view the detailed description of the job. This function also allows you to add instructions to be printed on the work order.

1. Locate the desired order.
2. Click the **SCOPE OF WORK** button on the Order Tool Bar.

   Figure 104
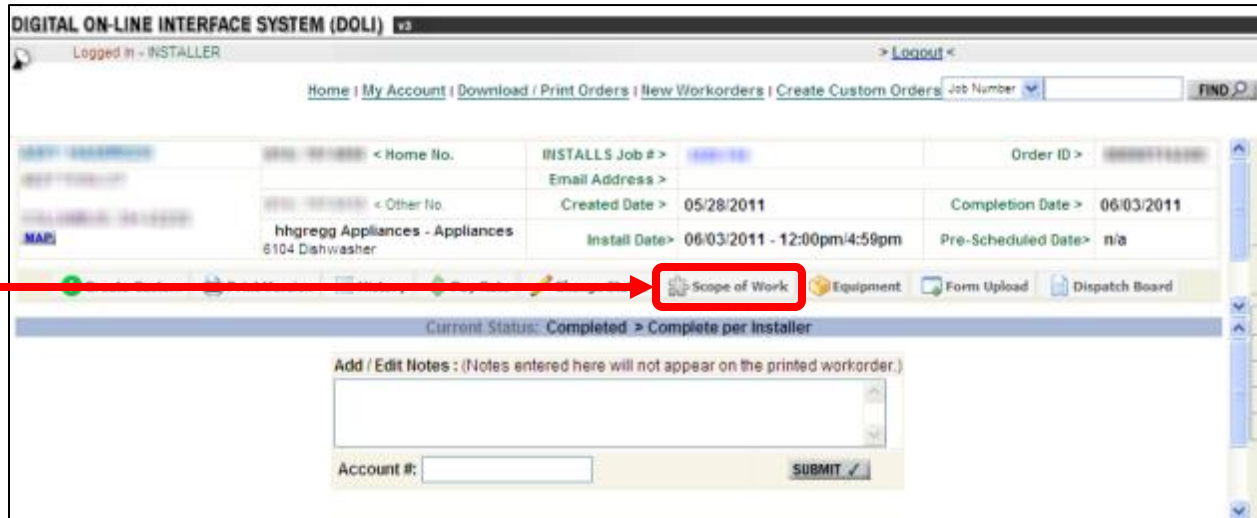
Note: This displays the scope of work for the order in the bottom portion of the screen.

   Figure 105

3. To enter Additional Instructions on the Scope of Work (e.g., driving directions), perform the following steps:
   a. Type the additional instructions in the lower text box.
   b. Click the **SUBMIT** button to save the additional instructions.

      Note: The text you submitted now appears in the **Additional Instructions** box on the work order.

Equipment: Viewing Equipment for a Single Order

Note: If a client provides Installs information about the product(s) the customer bought when they purchased the service, it is displayed in the **EQUIPMENT** feature. A limited number of clients are currently providing this information to Installs.

1. Locate the desired order.
2. Click the **EQUIPMENT** button on the Order Tool Bar.

   Figure 106
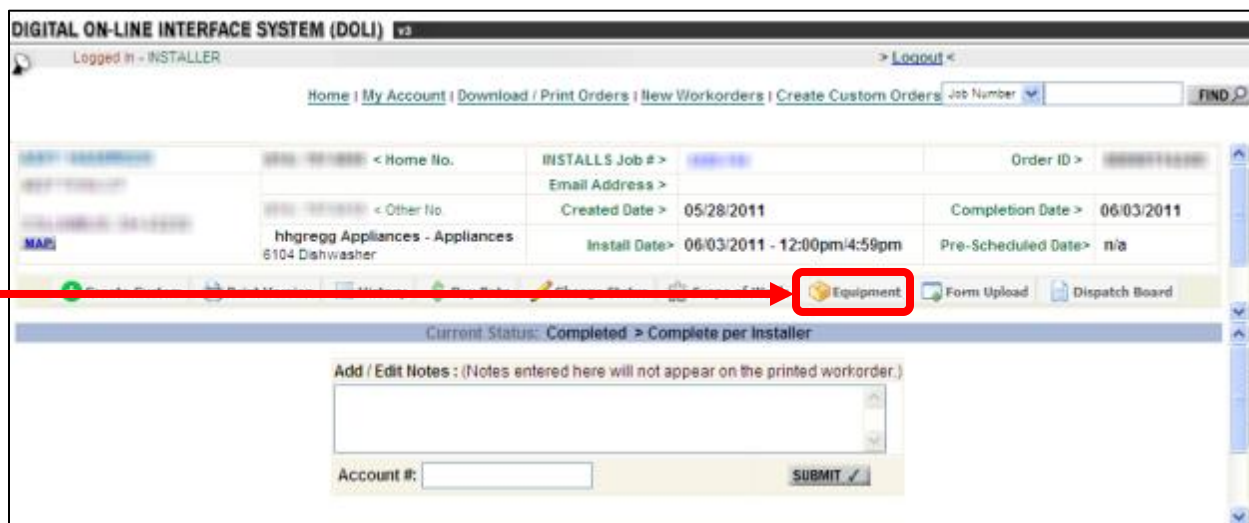
Note: This displays the equipment information in the bottom portion of the screen. If the client does not provide equipment information, you will see the message "No Equipment has been found for this job."

   Figure 107
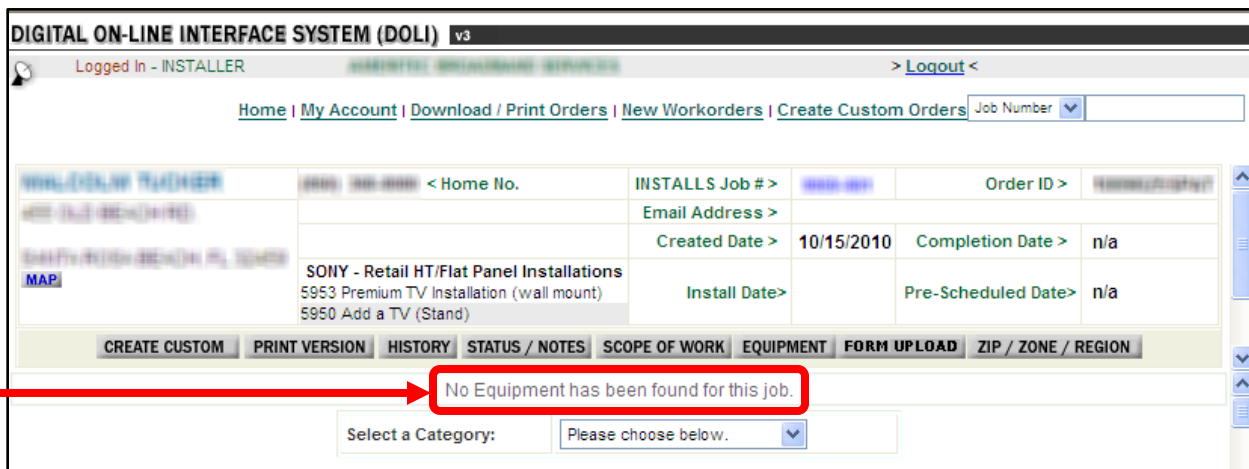
If the client provides equipment information, you will see a list of the products purchased.

   Figure 108
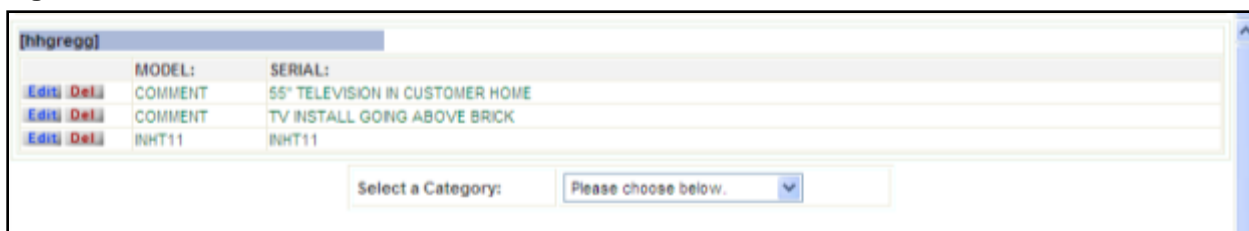
3. You are not required to add any equipment to a job unless specified in the order's Scope of Work.

Form Upload: Uploading a Paperwork to a Single Order

Note: Use the **FORM UPLOAD** function to upload scanned pre-installation consultation or site survey forms. Pre-installation consultation and site survey forms must be uploaded the **SAME DAY** the consult is completed.

Also use the **FORM UPLOAD** feature to upload scanned accounting paperwork for payment.

The maximum size per individual file is 8 MB. The system will accept files in many common formats (e.g., .doc, .xls, .jpg, .pdf) **unless you have been instructed to use a specific file type.** DOLI does not currently accept Microsoft Office 2007 files (e.g., .docx, .xlsx, etc.).
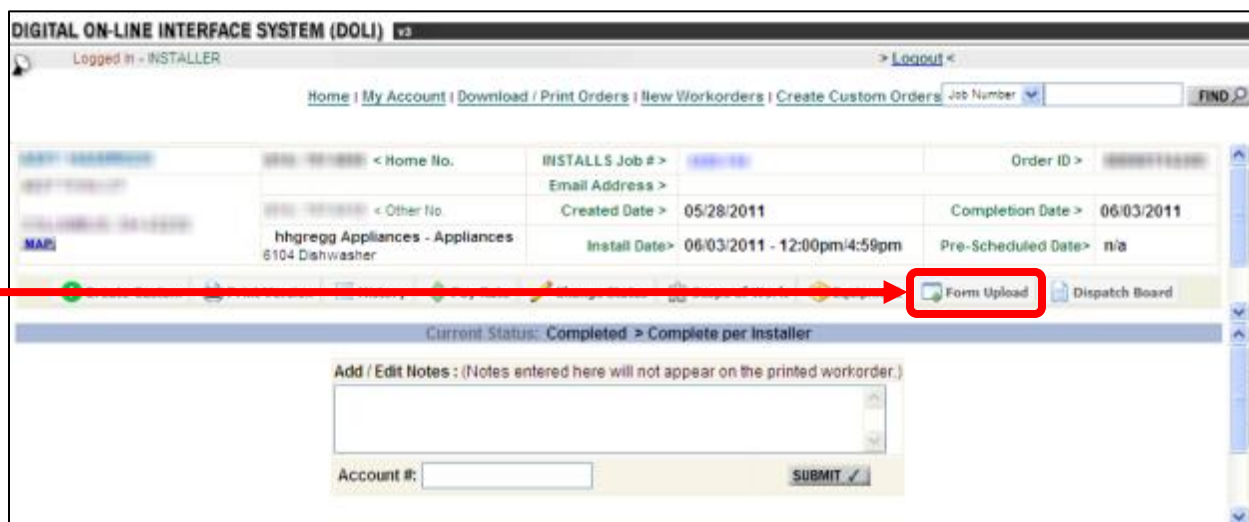
1. Click the **FORM UPLOAD** button on the Order Tool Bar.

    Figure 109

    Note: This displays the *Form Upload* screen.

    Figure 110
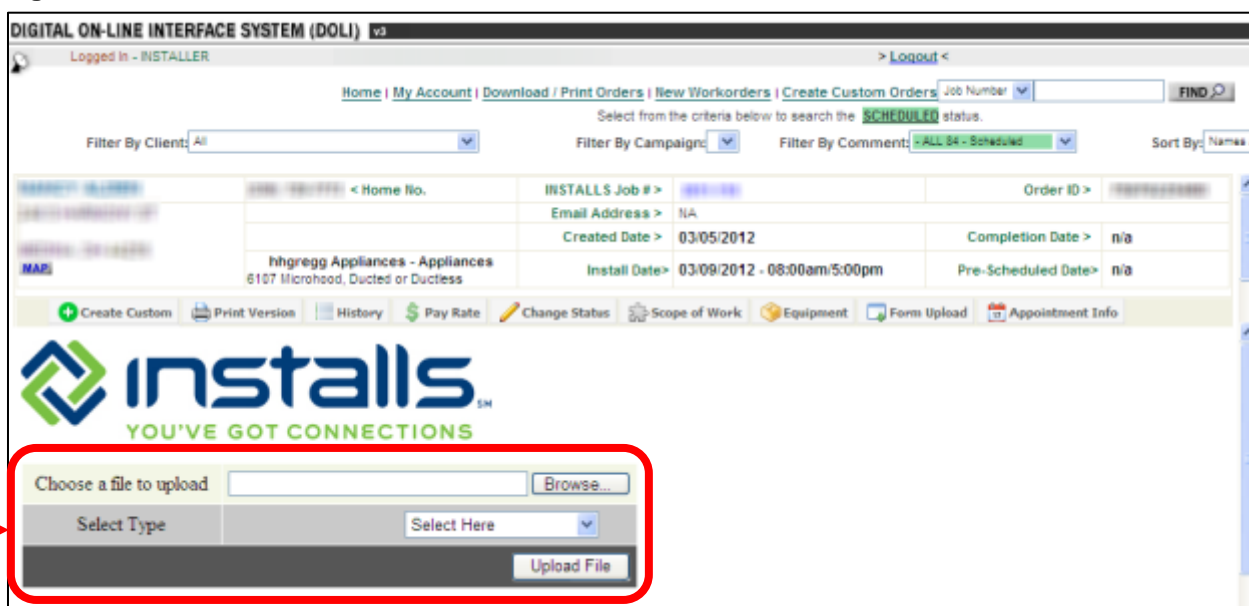
2. Click the **Browse** button.

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

3. Using the *Choose File to Upload* dialog box, locate and select the file you wish to upload to DOLI.

4. 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.

5. From the **Select Type** drop-down list, select the appropriate type for the paperwork you are uploading:

   - Select **Accounting Paperwork** if you are uploading job paperwork for payment.
   - Select **Consultation Form – MUST BE PDF** if you are uploading pre-installation consultation or site survey forms.
   - Select **Delivery Receipt** if you are uploading a Delivery Receipt (DR) Form for an Estes Level 2 Logistics job.

6. Click the **Upload File** button.

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

   Figure 111

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

Appointment Info: Reassigning an Installs Order to a Different Technician BEFORE Dispatch Time

Note: All initial appointment scheduling and rescheduling to different dates and arrival windows for Installs orders should be processed by Installs. If you need to reschedule an Installs job, please call Installs at 1-888-490-4321, option 4.

Use the **APPOINTMENT INFO** function BEFORE the 3:00pm local dispatch time to reassign a job to a different technician at your company for the SAME date and appointment arrival window.

To reassign a job to a different technician AFTER the 3:00pm local dispatch time, see the procedure for **Reassigning an Installs Order for the Same or Next Day via the Dispatch Board**.

To reassign a job to a different date or time, call Installs at 1-888-490-4321, option 4.
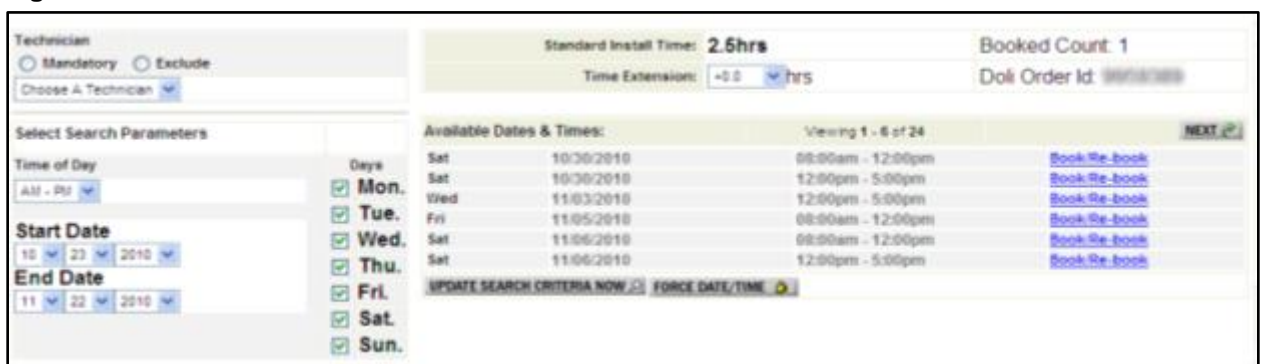
1. Click the **APPOINTMENT INFO** button on the Order Tool Bar.

   Figure 112
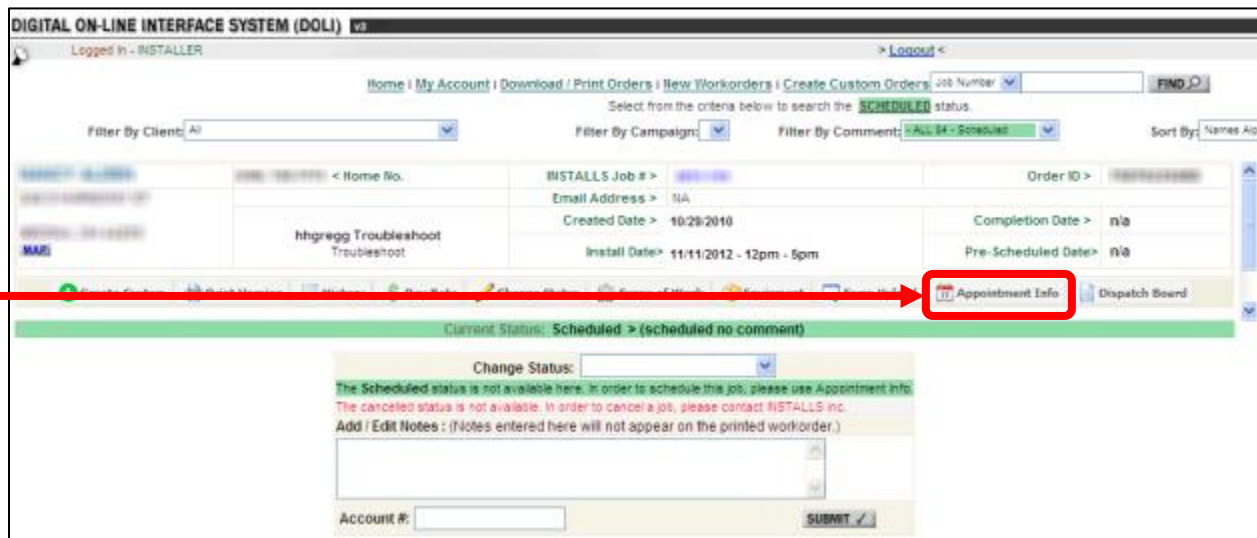
   Note: This displays the appointment options in the lower portion of the screen.

   Figure 113

2. Toggle the **Technician** radio button to **Mandatory**.
3. From the **Choose a Technician** drop-down menu, select the name of the technician to whom you wish to reassign the job.
4. Click the **UPDATE SEARCH CRITERIA NOW** button.

Figure 114

Note: This refreshes the list of Available Dates & Times based on the selected technician.

5. Click the **Book/Rebook** link next to the same date and time originally scheduled.

   Note: This displays the appointment confirmation screen.

   Figure 115

6. Click the **ACCEPT BOOKING** button on the appointment confirmation screen.

   Note: This reassigns the job to the new technician for the same date and time originally scheduled. This also displays the order history, indicating that the order has been scheduled to the new technician.

   Figure 116

Adding Installation Time to a Single Order

> **Note:** All initial appointment scheduling and rescheduling to different dates and arrival windows for Installs orders should be processed by Installs. If you need to reschedule an Installs job, please call Installs at 1-888-490-4321, option 4.
>
> Use the **Time Extension** function BEFORE the 3:00pm local dispatch time to add necessary time to a job that may take longer than usual to complete (e.g., customer wants additional work done). **Note that modifying the time required to complete a job may affect the date, arrival window, and technician that are available.**
>
> Do not add time to an order AFTER the 3:00pm local dispatch time.

1. Determine how much time it would take an average technician to complete the additional work.
2. Locate the desired order.
3. Click the **APPOINTMENT INFO** button on the Order Tool Bar.

   Figure 117
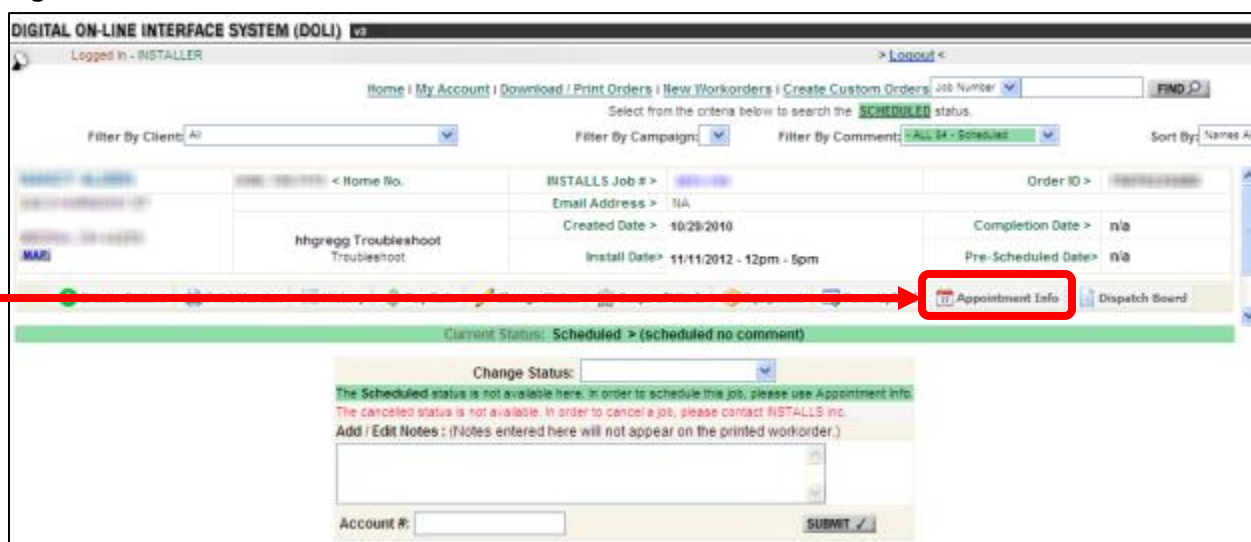
> **Note:** This displays the appointment options in the lower portion of the screen.

   Figure 118

4. From the **Time Extension** drop-down list, select the amount of time you wish to add to the job.
5. Click the **UPDATE SEARCH CRITERIA NOW** button.

Figure 119

Note: This displays an updated list of Available Dates & Times based on the criteria you specified.

7. To schedule an appointment, click the **Book/Rebook** link next to the desired date and time.

## *Forcing an Installs Job to a Specific Date and Time*

Note: All initial appointment scheduling and rescheduling to different dates and arrival windows for Installs orders should be processed by Installs. If you need to reschedule an Installs job, please call Installs at 1-888-490-4321, option 4.

Use the **FORCE/DATE TIME** function BEFORE the 3:00pm local dispatch time to reassign a job to a different technician at your company for the SAME date and appointment arrival window.

This feature differs from the one outlined in **Appointment Info: Reassigning an Installs Order Before Dispatch Time.** When you reassign an order using **FORCE/DATE TIME**, you can reassign to a technician who may not otherwise be available for scheduling for one of the following reasons:

- The job is outside of the technician's coverage area
- The technician does not have the skill set required for the job documented in the system
- The technician is not available for the scheduled job date/time (e.g., day off)

You cannot force an appointment to the next day after the 3:00pm local dispatch time the night before.

1. Locate the desired order.
2. Click the **APPOINTMENT INFO** button on the Order Tool Bar.
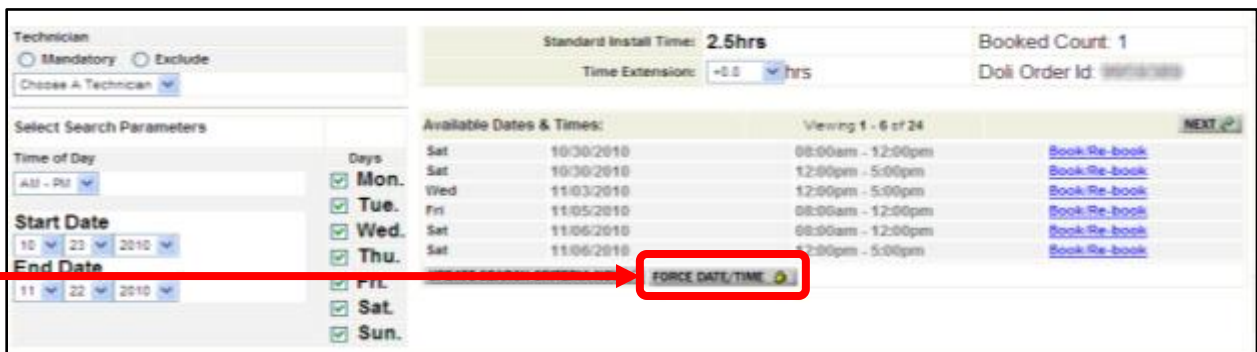
   Figure 120
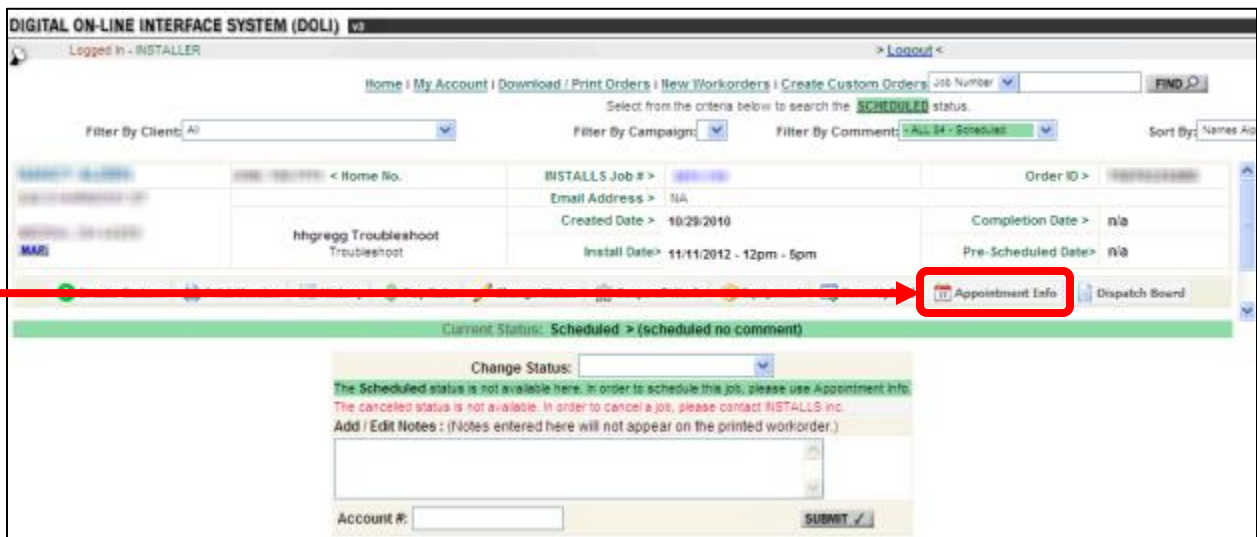
   Note: This displays the appointment options in the lower portion of the screen.
3. Click the **FORCE DATE/TIME** button below the Available Dates & Times list.

   Figure 121

   Note: This displays the *Force Appointment* screen.

Figure 122

4. From the **Technician** drop-down list, select the technician to whom you want to force the job.
5. From the **Time of Day** drop-down list, select the appointment time to which you want to force the job.
6. From the **Start Date** drop-down menus, select the month, date, and year of the desired appointment.

   Note: You cannot force an appointment for the following day after dispatch the night before.

7. If you need to add more time to the job, select the number of additional hours needed from the **Time Extension** drop-down list.
8. Click the **FORCE APPOINTMENT NOW** button.

   Note: Because forcing appointments can affect other already routed jobs, you must **immediately contact the Installs Field Relations Department** at 1-888-490-4321 to have them manually update the job as scheduled.

Dispatch Board

Viewing Assigned Orders on the Dispatch Board

Note: All appointment scheduling and rescheduling for Installs orders should be processed by Installs. If you need to reschedule an Installs job, please call Installs at 1-888-490-4321, option 4.

The **DISPATCH BOARD** function can be accessed via the Main Navigation bar on the DOLI homepage or from the Order Tool Bar on the order.

1. From the DOLI homepage or from the Order Tool Bar on the order, click the **DISPATCH BOARD** button.

Figure 123
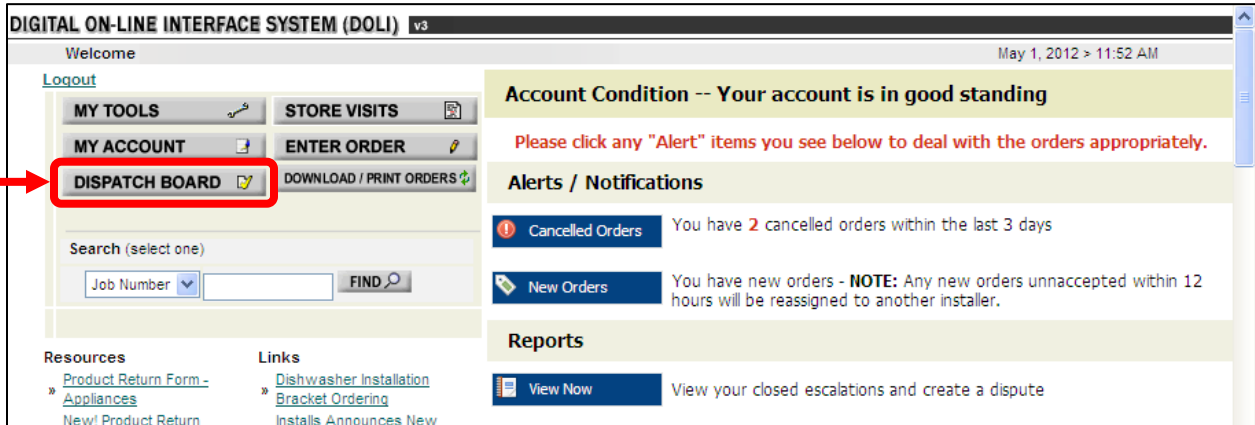
OR
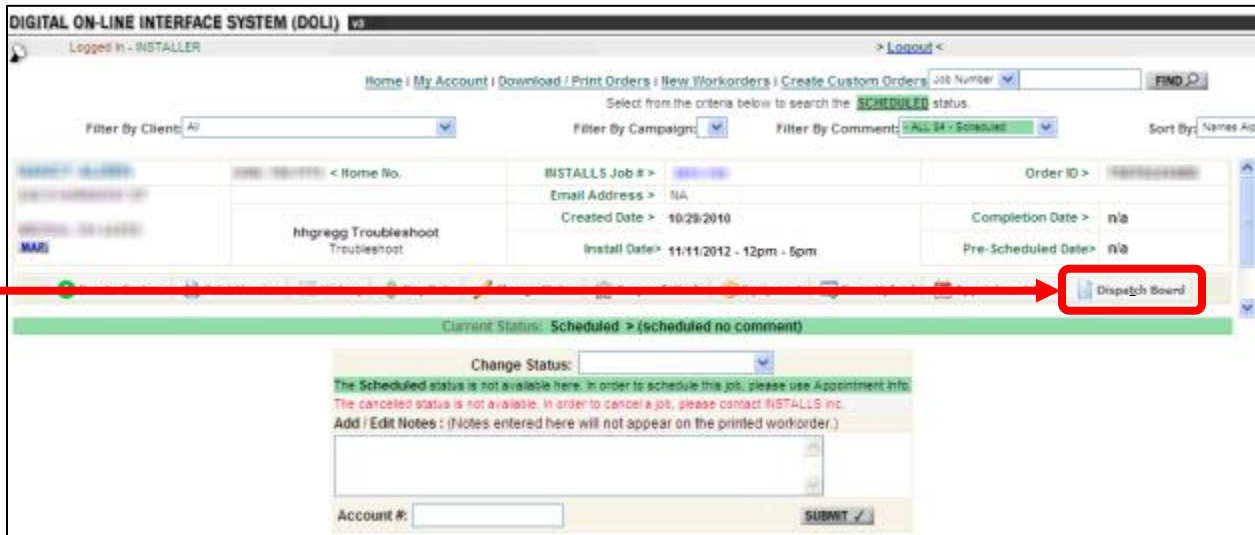
Note: This displays the blank Dispatch Board.

2. From the **Go to a Region** jump menu, select the desired region.

Figure 124

Note: This displays the dispatch board for the selected region.

Figure 125

Note: The following information is visible on each order on the Dispatch Board:

Figure 126

Premium On Wall 33in to 50in	Last Name	Dur/ Add Job	Status
		2.50 hrs /No	Scheduled-
City, State	**Zip**	**ETA**	**Campaign** **Store**
HARRISBURG, PA	17122	08:00 AM	TV Sales 201
SP ID	**ID**	**CLIENT ID**	**Date- Start/End Time**
			11/04/2010 08:00AM/11:59AM

- **First Block:** Purchased Service
- **Last Name:** Customer's Last Name
- **Dur/Add Job:** Expected duration of the job/Extra time added to job (Yes or No)

- **Status:** Color-coded status
  - o Cancelled (gray)
  - o Complete (blue)
  - o Hold (pink)
  - o Needs Installs Action (orange)
  - o Prescheduled (tan)
  - o Scheduled (green)
  - o Scheduled-Accepted (neon green)
  - o Scheduled-Dispatched (yellow)
  - o Unscheduled (tan)
  - o Waiting Customer Action (red)
- **City, State:** Customer's City and State
- **Zip:** Customer's ZIP Code
- **ETA:** Technician arrival window start time AM (8:00am-11:59am) or PM (12:00pm-4:59pm or 5:00-8:59pm)
- **Campaign:** Category to which scheduled service corresponds; varies by client
- **Store:** Client Store Number from which customer purchased service
- **SP ID:** Installs Order Number
- **ID:** Installs Order Number
- **Client ID:** Client's order number
- **Date- Start/End Time:** Date and arrival window technician is expected at the customer's location

Reassigning an Installs Order for the Same Day or Next Day via the Dispatch Board

Note: Use the **DISPATCH BOARD** function to schedule or reroute an Installs order for the same day. You can also use this feature to schedule or reroute an order AFTER the 3:00pm local dispatch time for the following day.

1. Locate the desired order in DOLI.
2. Click the **Dispatch Board** button on the order tool bar on the order.

    Figure 127
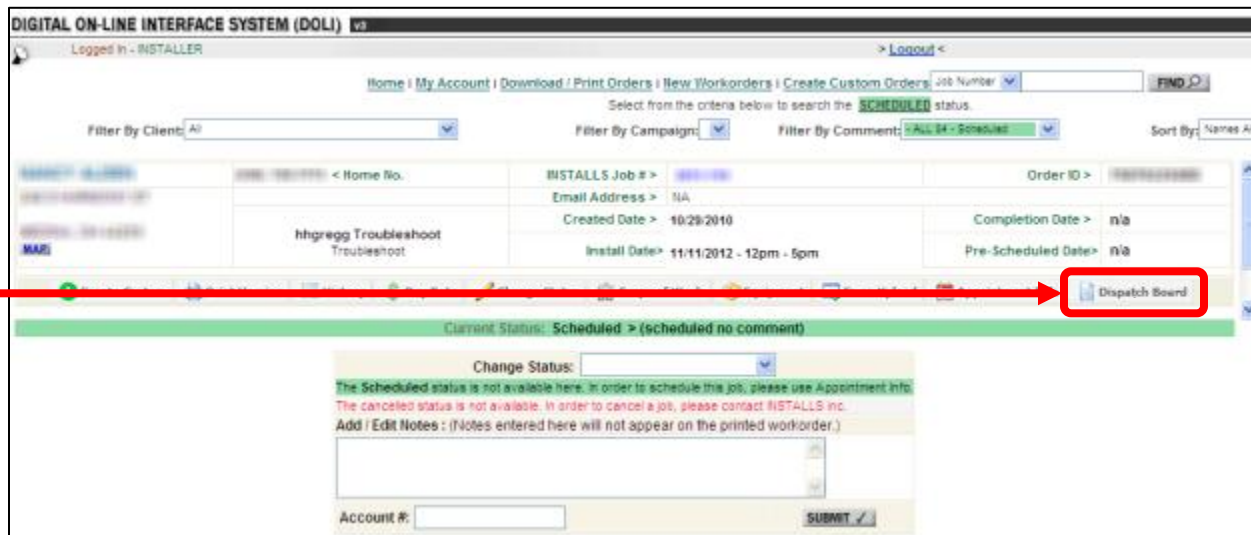
    Note: This displays the selected order on the dispatch board. A flashing triangle icon appears on the order.

    Figure 128
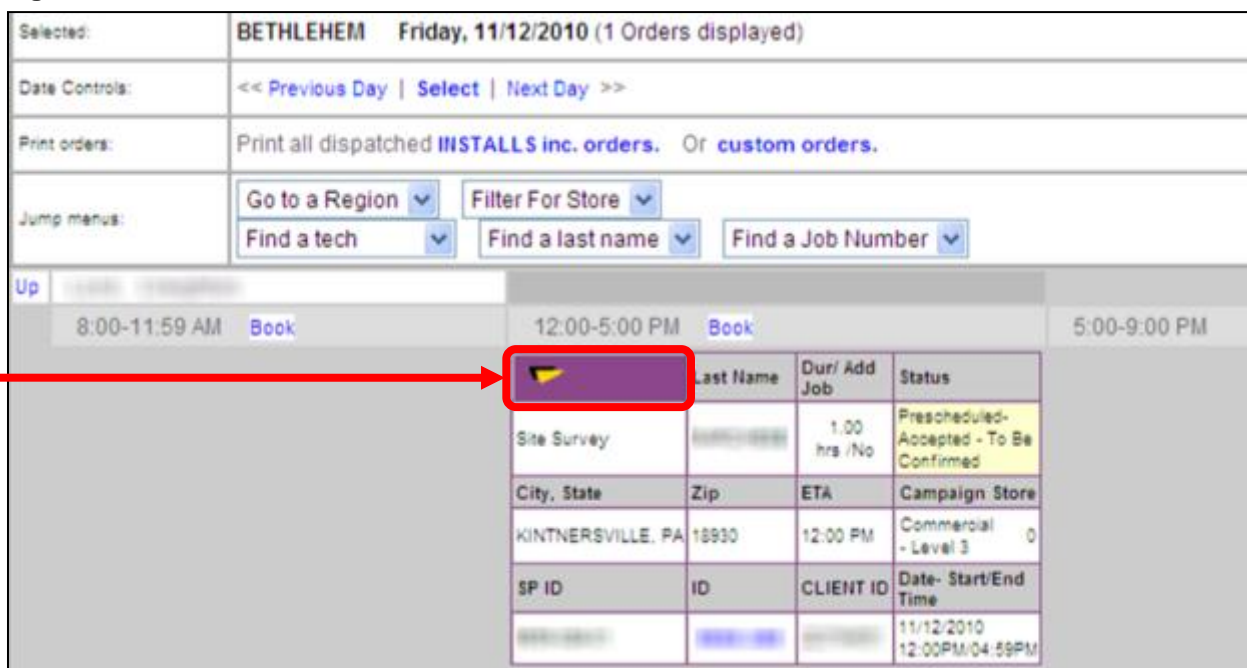
3. Click the **Book** link in the arrival window heading above the order you wish to reassign.

Figure 129
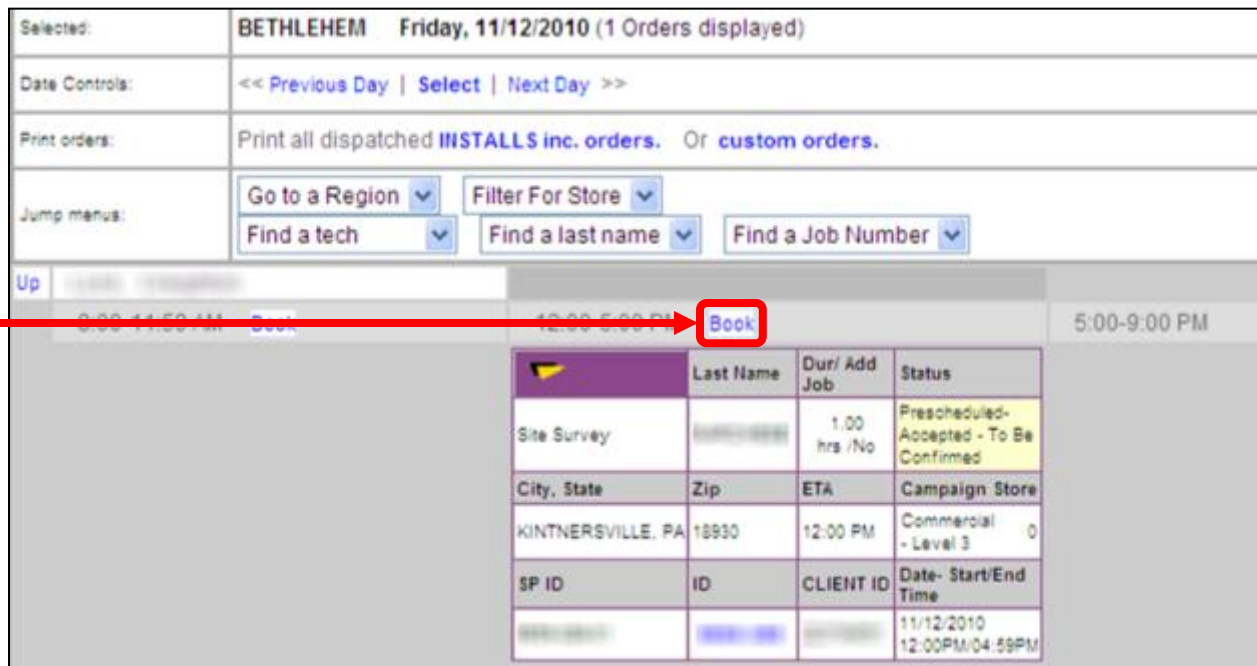
Note: This displays the **Re-book** link on the order.

Figure 130
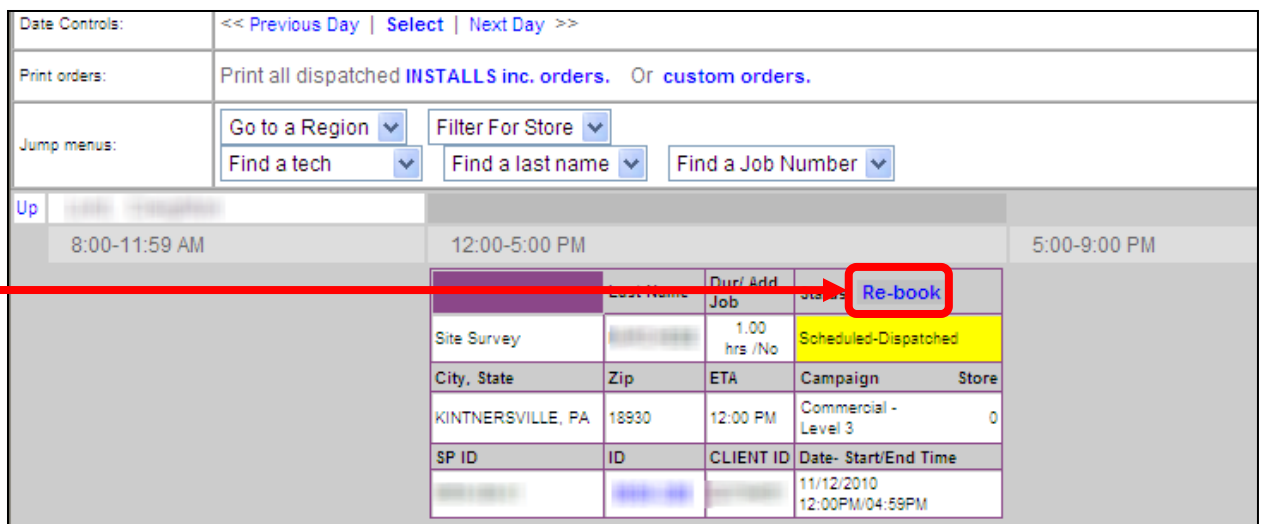
4. Click the **Re-book** link on the order.

    Note: This displays a confirmation dialog box.

    Figure 131
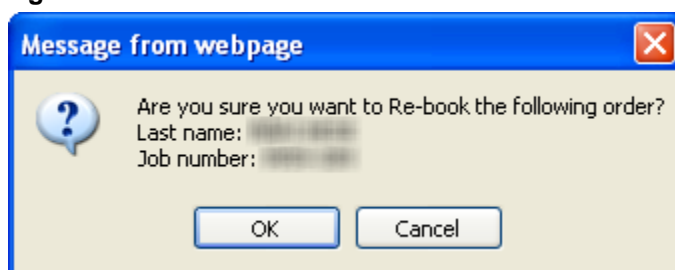
5. Click the **OK** button on the confirmation dialog box.

    Note: This removes the order from the Dispatch Board.

6. On the Dispatch Board, locate the technician to whom you want to reassign the job for the same date and arrival window.

   Note: You may need to use the Jump Menus to locate the new technician.

7. Click the **Book** link in the correct arrival window timeslot under the new technician.

Figure 132

Note: This places the order in the selected timeslot under the new technician. The job is now reassigned to the new technician.

Figure 133

Closing out an Order in DOLI

There are multiple ways of closing out an order in DOLI. The correct method depends on the type of order and the circumstances of the completion.

Closing out a PC Order – Real-Time Closeout

The Real-Time Closeout website (http://closeout.installs.com/) allows technicians to quickly and easily close PC workorders, verify that the customer's systems are working, and provide details of the services performed.

All PC installation orders with available customer internet access are to be closed from the customer location through the Real-Time Closeout web site. When closing out an order from the customer's computer, you will be prompted to test email and printers before closing the order to ensure that they are working correctly. If they were not set up properly, you will be prompted to re-evaluate the installation or set-up.
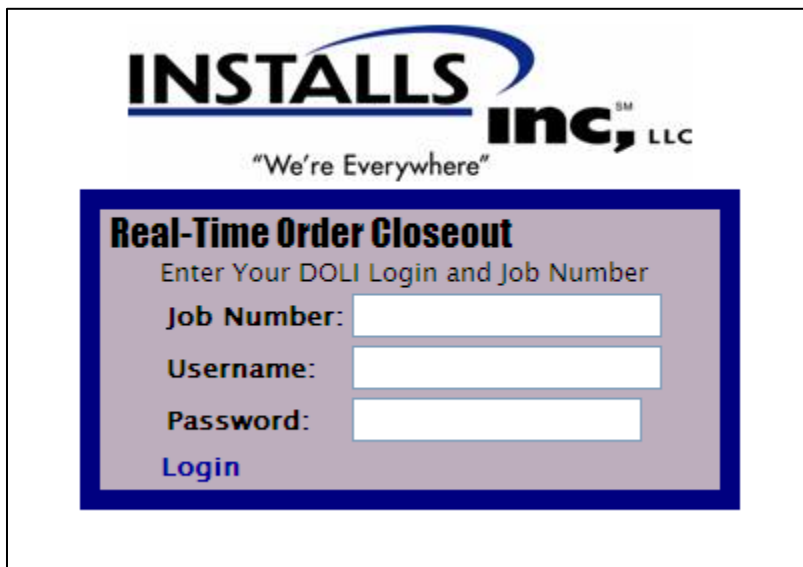
You will need your DOLI username and password, as well as the job number to use the close out site. If you need your DOLI ID, please call 1-888-490-4321.

If you are not able to access the Real-Time Closeout site to close a PC installation order (e.g., customer does not have internet access), you must call Installs' Field Service Department at 1-888-490-4321 from the customer's site to have the order closed out.

1. Using the customer's PC, navigate to the following website: http://closeout.installs.com/
   Note: This displays the Real-Time Closeout login page.
   Figure 134

2. Log in to complete the Real-Time Closeout form:
   a. In the **Job Number** field, type the job number you are closing out.
   b. In the **Username** field, type your DOLI username.
   c. In the **Password** field, type your DOLI password.
   d. Click **Login**.
      Note: This displays the *Order Closeout* page for the job.

Figure 135

3. Complete the Order Closeout Form:
   a. Time on Site:
      i. From the **Completion Date** drop-down lists, select the month, date, and year the job was completed. The date displayed will default to the scheduled date; adjust to the actual completion date, if necessary.
      ii. From the **Arrival Time** drop-down lists, select the hour and minute you arrived for the job. Be sure to select **AM** or **PM** from the last drop-down list.
      iii. From the **Departure Time** drop-down lists, select the hour and minute you will be leaving the job. Be sure to select **AM** or **PM** from the last drop-down list.
   b. Job Information:
      i. From the **Scope Completed** drop-down list, select **Yes** to indicate that the entire scope of work was completed; select **No** if the entire scope of work was not completed.
      ii. Document the details of the work performed in the **Work Performed** field at the bottom of the form (outlined below).
         Note: If you have any problems completing the scope of work on any order, you must contact Installs Field Services at 1-888-490-4321. Documenting the issues you experienced with the scope of work on the Real-Time Closeout form does not replace the need to contact INSTALLS inc Field Services directly; You must perform both actions.
      iii. In the **W/O Signed By field**, type the first and last name of the person (customer) who signed the workorder.
      iv. In the **Technician Name** field, type your first and last name.
   c. Computer Information:
      i. From the **Operating System** drop-down list, select operating system running on the customer's PC.
         Note: If the customer's operating system is not listed, select **Other** from the drop-down list. Type the name of the operating system in the **Enter OS** pop-up box, and click **Add Option**.

Figure 136

ii. In the **Service Tag** field, type the service tag number or product ID provided by the manufacturer on the customer's equipment.

Note: This allows easy identification of the hardware in the event of any future issues.

d. ISP/Network Information:

i. From the ISP drop-down list, select the name of the customer's Internet Service Provider.

Note: If the scope of work did not require you to set up an ISP or network peripherals, select **None** from the drop-down list and note in the **Comments** field at the bottom of the form (outlined below).

If the customer's ISP is not listed, select **Other** from the drop-down list. Type the name of the ISP in the **Enter OS** pop-up box, and click **Add Option**.

Figure 137

ii. From the **Connection Type** drop-down list, select the type of internet connection used.

iii. From the **Network Type** drop-down list, select the method by which the computers on the network are connected.

iv. From the **Email** drop-down list, select the method the customer uses to access email.

- Select **Web** if the customer access email via a web-based service (e.g., Yahoo! Mail, Hotmail, Gmail, etc.).

- Select **Client** if the customer gets their email through an installed email application (.e.g., Outlook, Thunderbird, Eudora, etc.).

  o When you select **Client**, you will be prompted to test the email set-up; click the **Send Test Email** link that appears. This opens the customer's email client and sends an email from the customer's computer to a verification server, which in turn sends a response back to the customer's email account. This verification is very important, as it confirms that the service was completed properly.

Figure 138

e. Data Migration

Note: The **Data Migration** section appears on the *Order Closeout* form only if the job includes a data migration service.

Figure 139

i. In the **Amount Transferred** field, type the amount of data transferred in gigabytes.

ii. In the **Transfer Device** field, type the tool or software that was used to transfer data.

f. Hardware/Peripherals Installed:

Note: Perform the following steps for each piece of hardware you installed. For example, if you installed a printer, a digital camera, and two (2) MP3 players, you would perform the following steps four (4) times, once for each peripheral.

i. Click the **Add Peripheral** link.

Note: This displays fields for documenting the hardware/peripherals installed.

Figure 140

ii. From the **Type** drop-down list, select the type of peripheral you installed.

- When you select **Printer** from the **Type** drop-down list, the **Test Printer** pop-up is displayed.

  Figure 141

  Click the **Test Printer** link to print a test page to test the functionality of the customer's printer. The test page printout contains useful information for the customer's future reference.

iii. In the **Make/Model** field, type the make and model of the installed peripheral.

iv. From the **Connection** field, select the method by which the peripheral is connected to the computer or network.

v. Repeat the steps above for each peripheral you installed.

g. Work Performed:

i. In the **Work Performed** field, type the details of the work you performed to complete the job.

Example: *Unpacked computer and monitor, connected keyboard, speakers, and mouse. Set up the internet with Time Warner ISP and transferred 3 GB of data.*

Note: If you have any problems completing the scope of work on any order, you must contact Installs Field Services at 1-888-490-4321. Documenting the issues you experienced with the scope of work on the Real-Time Closeout form does not replace the need to contact Installs Field Services department directly; you must perform both actions.

h. Comments:

i. In the **Comments** field, type any additional information related to the job.

Example: *Customer stated that he is very happy with the installation.*

Note: If you have any problems completing the scope of work on any order, you must contact Installs Field Services at 1-888-490-4321. Documenting the issues you experienced with the scope of work on the Real-Time Closeout form does not replace the need to contact Installs Field Services department directly; you must perform both actions.

4. Click the **Submit Closeout** link at the bottom of the form.

   Note: This uploads all the data you entered on the Real-Time Closeout form to DOLI, and closes the job in DOLI. You do not need to perform any actions on this job in DOLI.

Note: If you are unable to access the Real-Time Closeout form from the customer's computer or call Installs from the customer's site, you can access the form via DOLI:

- Locate the PC job in DOLI.

- From the **Change Status** drop-down list in DOLI, select **Completed**.

- Click the **SUBMIT** button in DOLI to save the status change.

  Note: This displays the Real-Time Closeout form in a new window. Your browser must allow pop-ups in order for the form to be displayed.

- Complete and submit the Real-Time Closeout form as described above.

  Note: This method should be used as a **last resort** only if you cannot close out the order by accessing http://closeout.installs.com/ or calling Installs from the customer's site. Using this method may impact your quality rating.

Closing out an In-Home Consultation Order

Complete and upload the appropriate scanned (PDF) In-Home Consultation Form(s) to the job using the full version of DOLI, then close the job. You cannot close out a consultation order without uploading the consultation form. You must **upload completed Consultation Forms to DOLI the SAME DAY you perform the consult**.

1. Locate the desired order in DOLI.
2. Click the **FORM UPLOAD** button on the Order Tool Bar.

    Figure 142
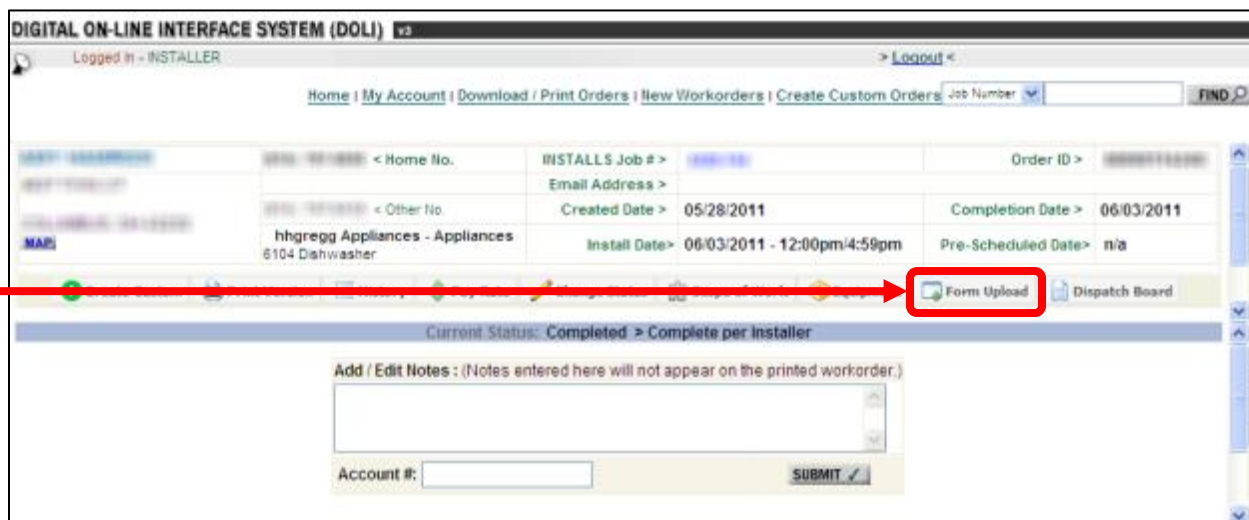
    Note: This displays the *Form Upload* screen.

    Figure 143
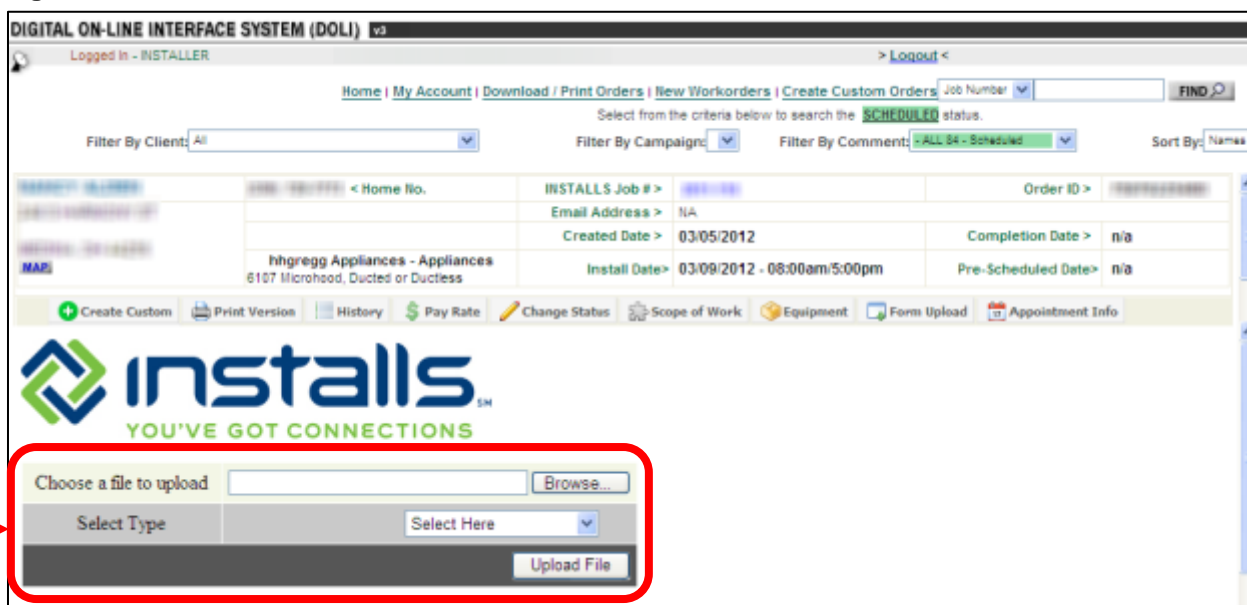
3. Click the **Browse** button.

    Note: This opens the *Choose File to Upload* dialog box.
4. Using the *Choose File to Upload* dialog box, locate and select the file you wish to upload to DOLI.
5. 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.
6. From the **Select Type** drop-down list, select the appropriate type for the paperwork you are uploading:
7. Select **Consultation Form – MUST BE PDF**.

8. Click the **Upload File** button.

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

   Figure 144
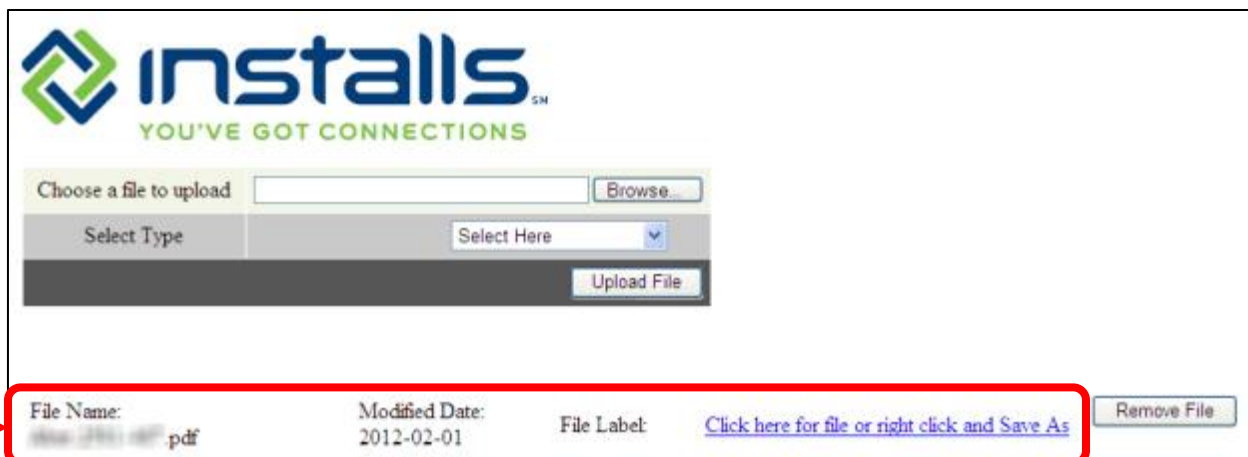
9. If you do not see a list if links to each uploaded file (you may need to scroll down), click the **FORM UPLOAD** button again to refresh the screen.

10. Click the **Change Status** button on the order tool bar.

   Figure 145

11. From the **Change Status** drop-down list, select the desired new status.

   Figure 146

12. From the **Comment** drop-down list, select the comment that best describes the current status of the order.

   Note: The status and status comments installers should use are:

- **Status = Completed, Comment = Completed per SOW:** You completed the Scope of Work (SOW); the job is done.

    Figure 147

    Note: Use the **Completed** status with the **Completed per SOW** comment **ONLY** if you completed the **ENTIRE** Scope of Work (SOW) for the job. If you performed **PART** of the SOW on a job, but are not able to complete the entire SOW for any reason, you **MUST** call Installs from onsite to have an agent enter notes on the situation and update the job with the appropriate status and status comment. This applies to jobs for all clients.

    You cannot change the status of an In-Home Consultation job to Complete until you upload the consultation form(s).

- **Status = Need INSTALLS inc Action, Comment = Declining Job – see Notes:** Use this status if you have accepted a job that you now cannot perform. Provide details in **Notes** window. If it is less than 24 hours before the scheduled appointment, also call Installs so we can reset expectations with the customer.

    Figure 148

- **Status = Need INSTALLS inc Action, Comment = Job Description Issue:** Use this status if the customer presents any issues that prevent you from completing the job as outlined (e.g., customer misunderstood SOW; customer expectations) or as scheduled (e.g., customer wants to move appointment). Provide details in **Notes** window. If the issue is brought to your attention less than 24 hours before the scheduled appointment or while onsite, also call Installs so we can immediately address the issue.

  Figure 149

- **Status = Scheduled, Comment = Service Confirmed:** Use this status when you confirm an accepted job the day before the scheduled appointment.

  Figure 150

- **Status = Scheduled, Comment = Accepted:** Use this status when you confirm an accepted job after dispatch time, up through the scheduled appointment time.

  Figure 151

13. If applicable, from the **Completion Date** drop-down lists, select the month, date, and year you are updating the status.
14. Enter any comments related to the status change in the **Add/Edit Notes** field.
15. Click the **SUBMIT** button to save the status change and notes.

Closing out a Standard Order

For TV, Home Theater, and Security Camera jobs, close out the order in DOLI when the job is complete. You are expected to **close out completed jobs in DOLI within 24 hours of the scheduled date**.

1. Locate the desired order in DOLI.
2. From the **Change Status** drop-down list, select **Completed**.
3. From the **Comment** drop-down list, select the comment that best describes the current status of the order.
    Note: The status and status comments installers should use are:

    Status = Completed, Comment = Completed per SOW: You completed the Scope of Work (SOW); the job is done.
    Figure 152

   Note: Use the **Completed** status with the **Completed per SOW** comment **ONLY** if you completed the **ENTIRE** Scope of Work (SOW) for the job. If you performed **PART** of the SOW on a job, but are not able to complete the entire SOW for any reason, you **MUST** call Installs from onsite to have an agent enter notes on the situation and update the job with the appropriate status and status comment. This applies to jobs for all clients.

   a. From the **Completion Date** drop-down lists, select the month, date, and year you are closing out the order.
   b. 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.
   c. Click the **SUBMIT** button to save the status change and notes.

MANAGING NON-INSTALLS ORDERS USING DOLI

As an installer company you have the opportunity to use DOLI to enter, schedule, route, and manage work from any non-Installs line of business the same way you manage Installs orders.

Entering a Non-Installs Order in DOLI

Note: Use the **ENTER ORDER** feature to create a work order from any non-Installs line of business and route it to your technicians.

1. On the DOLI homepage, click the **ENTER ORDER** button.

   Figure 153
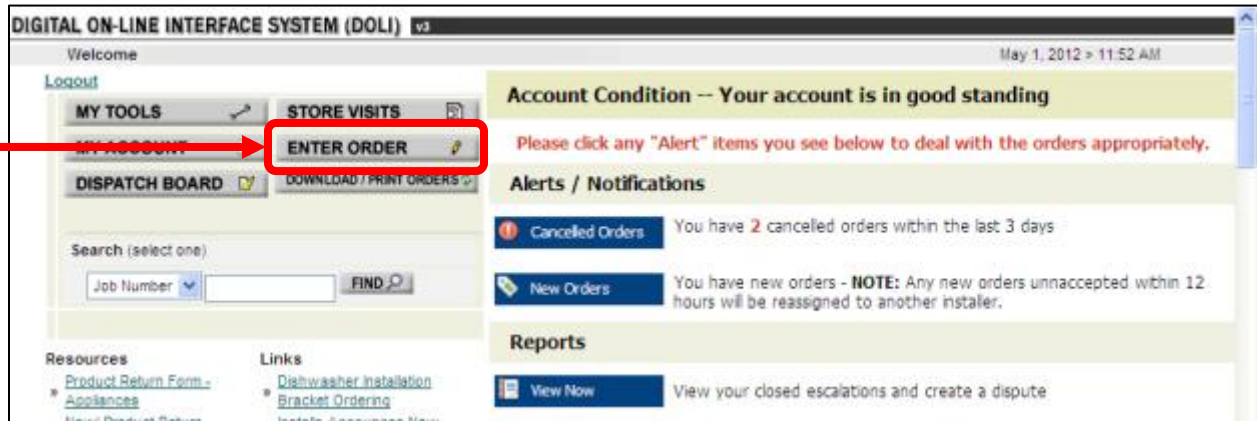
   Note: This displays the client screen.

   Figure 154

2. If you need to create a new client, perform the following steps:
   a. In the **Company Name** field, type the name of the new client.
   b. If required, type the new client SKU in the **Client SKU** field.

  c. Click the **Create a New Client** button.
3. To enter an order for an existing client or the new client you just created, perform the following steps:
  a. From the **Select an Existing Client** drop-down list, select the desired client.
  b. Click the **Submit** button.
   Note: This displays the order screen.
   Figure 155

  c. Use the fields provided to enter the new order.
  d. Click the **Create Order** button.
   Note: This creates the order and displays an "Order Submitted" confirmation message.

Viewing Non-Installs Orders in DOLI

Note: Use this procedure to view non-Installs orders you created in DOLI.

1. On the DOLI homepage, click the **MY ACCOUNT** button.

   Note: This displays the *My Orders* screen. The order you created is visible under specified client.

   Figure 156

2. Click the hyperlinked number under the **Unscheduled** status on the *My Orders* screen.

   Note: This opens the status screen.

   Figure 157

3. Click the **FIND** button.

   Note: This displays a list, on the right side of the screen, of orders for the selected client.

4. Click the name on the order in the list on the right side of the screen to view a summary of the order in the main panel of the screen.

Figure 158

Scheduling Installations for Non-Installs Orders in DOLI

Note: Use this procedure to schedule installation appointments for non-Installs orders you created in DOLI.

1. Locate the desired order.
2. Click the **APPOINTMENT INFO** link on the Order Tool Bar.
   Note: This displays the appointment screen.

   Figure 159

   Note: The appointment options on the screen are listed in order from best option to worst option for routing purposes. It is important to always offer the first appointment.

3. If no appointments on the first page of Available Dates & Times are acceptable to the customer, perform the following steps:
   a. Use the Select Search Parameters fields on the left side of the screen to modify date and time requirements.
   b. Click the **UPDATE SEARCH CRITERIA NOW** button.
      Note: This displays a new list of available appointments based on your specified criteria. Again, offer appointments from the top of the list for the best routing options.
4. To schedule an appointment, click the **Book/Rebook** link next to the desired date and time.
5. Click the **ACCEPT BOOKING** button on the appointment confirmation screen.

   Figure 160

   Note: This schedules the appointment and displays the history screen, indicating that the order has been scheduled.

Appointment Info: Optimizing Scheduling for Non-Installs Orders

Note: If you choose to manage your non-Installs orders in DOLI, you can use the **APPOINTMENT INFO** function to optimize routing of jobs. Using this feature allows you to have your non-Installs jobs appear on the schedule alongside Installs jobs, increasing technician routing efficiency.

Use the **APPOINTMENT INFO** function BEFORE the 3:00pm local dispatch time to reassign a non-Installs job to a different technician at your company for the SAME date and appointment arrival window.

To reassign a job to a different technician, or to reassign a job AFTER the 3:00pm local dispatch time, see the procedure for **Reassigning a Non-Installs Order for the Same or Next Day via the Dispatch Board**.

1. Locate the desired order.
2. Click the **APPOINTMENT INFO** button on the Order Tool Bar.

   Figure 161

Note: This displays the appointment screen.

   Figure 162

3. Toggle the **Technician** radio button to **Mandatory**.

4. From the **Choose a Technician** drop-down menu, select the name of the technician to whom you wish to reassign the job.

5. Click the **UPDATE SEARCH CRITERIA NOW** button.

   Figure 163

   Note: This refreshes the list of Available Dates & Times based on the selected technician.

6. Click the **Book/Rebook** link next to the date and time same date and time originally scheduled.

   Note: This displays the appointment confirmation screen.

   Figure 164

7. Click the **ACCEPT BOOKING** button on the appointment confirmation screen.

   Note: This reassigns the job and displays the order history, indicating that the order has been scheduled to the new technician.

   Figure 165

Forcing a Non-Installs Job to a Specific Date and Time

Note: Use the **FORCE/DATE TIME** function BEFORE the 3:00pm local dispatch time to reassign a non-Installs job to a different technician at your company for the SAME date and appointment arrival window.

This feature differs from the one outlined in **Appointment Info: Optimizing Scheduling of Non-Installs Orders.** When you reassign an order using **FORCE/DATE TIME**, you can reassign to a technician who may not otherwise be available for scheduling for one of the following reasons:

- The job is outside of the technician's coverage area
- The technician does not have the skill set required for the job documented in the system
- The technician is not available for the scheduled job date/time (e.g., day off)

You cannot force an appointment to the next day after the 3:00pm local dispatch time the night before.

1. Locate the desired order.
2. Click the **APPOINTMENT INFO** button on the Order Tool Bar.

Figure 166
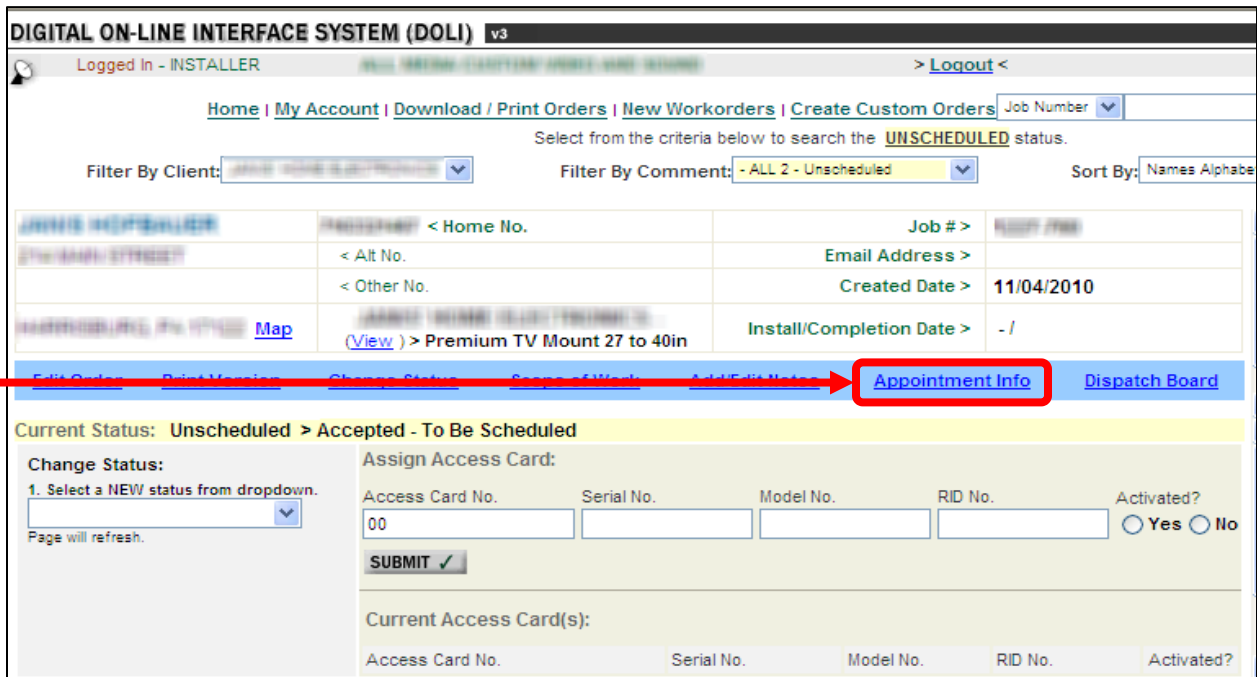
Note: This displays the appointment screen.

Figure 167

3. Click the **FORCE DATE/TIME** button below the Available Dates & Times list.
    Figure 168

Note: This displays the *Force Appointment* screen.

Figure 169

4. In the **Technician** section, perform the following steps:
    a. To schedule the appointment to a specific technician, toggle the **Technician** radio button to **Mandatory**; to exclude a specific technician from the available pool, toggle the **Technician** radio button to **Exclude**.
    b. From the **Choose a Technician** drop-down menu, select the name of the technician you wish to utilize or exclude.
5. In the **Select Search Parameters** section, perform the following steps:
    a. From the **Time of Day** drop-down menu, select **AM** or **PM**.
    b. From the **Start Date** drop-down menus, select the month, date, and year of the desired appointment.
        Note: You cannot force an appointment for the following day after dispatch the night before.
6. Click the **FORCE APPOINTMENT NOW** button.

Reassigning a Non-Installs Order for the Same Day or Next Day via the Dispatch Board

Note: Use the **DISPATCH BOARD** function to schedule or reroute an order for the same day. You can also use this feature to schedule or reroute an order AFTER the 3:00pm local time dispatch for the following day.

1. Locate the desired order in DOLI.
2. Click the **Dispatch Board** button on the order tool bar on the order.

   Figure 170

Note: This displays the selected order on the dispatch board. A flashing triangle icon appears on the order.

   Figure 171

3. Click the **Book** link in the arrival window heading above the order you wish to reassign.

Figure 172

Note: This displays the **Rebook** link on the order.

Figure 173
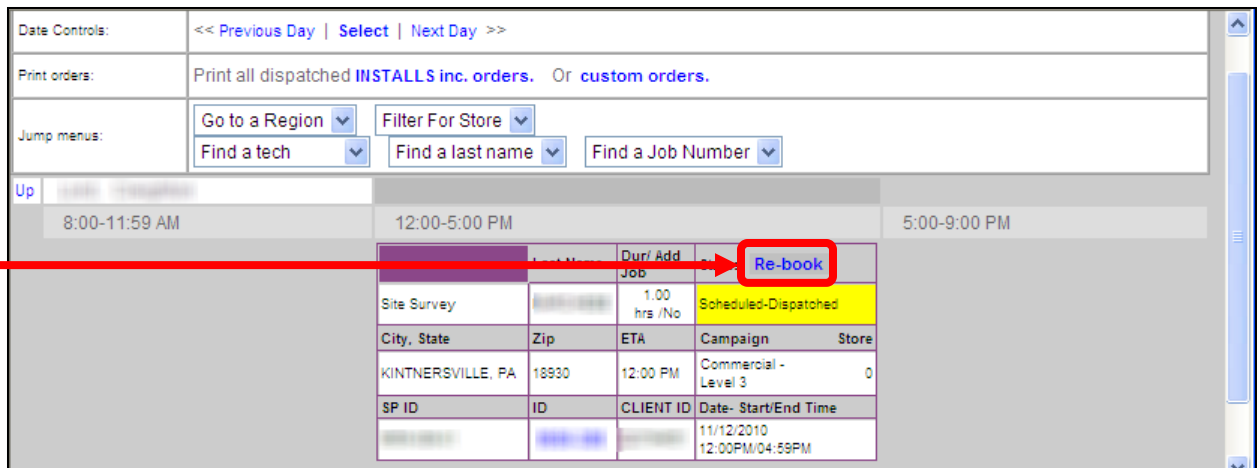
4. Click the **Re-book** link on the order.

   Note: This displays a confirmation dialog box.

   Figure 174
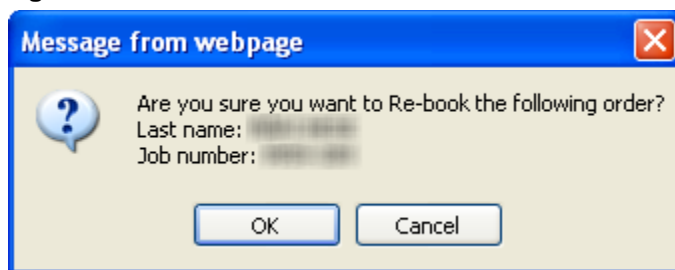
5. Click the **OK** button on the confirmation dialog box.

   Note: This removes the order from the Dispatch Board.

6. On the Dispatch Board, locate the technician to whom you want to reassign the job for the same date and arrival window.

7. Click the **Book** link in the correct arrival window timeslot under the new technician.

Figure 175

Note: This places the order in the selected timeslot under the new technician. The job is now reassigned to the new technician.

Figure 176

APPENDIX I: JOB SKILLS DEFINITIONS

Job Skill	Definition	Job Types Skill Applies to
Service Call	Technician is capable of performing follow-up work on a previous installation	• Appliance (Residential) • Home Theater (Residential) • Personal Computer (Residential) • Commercial
Projector	Technician is capable of installing projectors; ceiling-mounted projectors, free-standing screens, mounted projection screens, concealed projection screens	Audio Visual (Residential)
Level 2 Certification	No longer used	No longer used
Starband	No longer used	No longer used
Custom Home Theater	Technician is capable of providing customized Home Theater (Residential) solutions; wire concealment, cutting into walls for wiring or speaker/surround sound installation	Home Theater (Residential)
UltimateTV	No longer used	No longer used
Plasma Installs	Technician is capable of performing on-wall TV mounts	Home Theater (Residential)
XM/Sirius	Technician is capable of performing satellite radio installations; antennae, head units, speakers	Audio Visual (Commercial)
2 Man Crew	Technician is available for jobs that require two installers at once	• Appliance (Residential) • Home Theater (Residential)
Custom 3	No longer used	No longer used
Basic PC Install	Technician is capable of performing basic PC set-ups; setting up hardware/peripherals, email, wired internet connection, installing software (including security software)	Personal Computer (Residential)
Calibration	Technician is capable of performing basic TV calibrations; DVD calibrations, Spyder 3 calibrations	Home Theater (Residential)
Commercial Flat Panel	Technician is capable of installing flat panel TVs in commercial settings (offices, restaurants, hospitals, etc.)	Audio Visual (Commercial)
Commercial Server	Technician is capable of installing servers in commercial setting; installing server hardware, installing server software, configuring server software, repairing server software	Personal Computer (Commercial)

Job Skill	Definition	Job Types Skill Applies to
Appliance Installation	Technician is capable of performing basic electric (non-gas) appliance installations; microwaves, disposals, dishwashers, electric dryers, washing machines, refrigerators, electric ranges, electric ovens	Appliance (Residential)
Gas Permit	Technician meets all local requirements for performing installations that require a gas permit to be issued to the customer	Appliance (Residential)
Commercial A/V Survey	Technician is capable of performing site surveys for commercial AV installations	Audio Visual (Commercial)
Fitness Equipment Assembly	Technician is capable of picking up, delivering, and assembling home fitness equipment. Requires proper vehicle (cargo van, box van, box truck, or covered trailer) and the "Large Delivery" Job Skill.	Home Services (Fitness)
Basic Furniture Assembly	Technician is capable of performing basic furniture assembly (e.g., TV stands, computer workstations, etc.).	• Home Theater (Residential) • Personal Computer (Residential)
Uninstall	Technician is capable of de-installing previously installed equipment	• Appliance (Residential) • Home Theater (Residential) • Personal Computer (Residential) • Commercial
QC Job	Technician is capable of performing checks on the quality of other installers' installation and reporting results to Installs; at client's request	• Appliance (Residential) • Home Theater (Residential) • Personal Computer (Residential) • Commercial
Dish 500	No longer used	No longer used
Direcway	No longer used	No longer used
Prime	No longer used	No longer used
40 ft. Ladder	Technician has access to a 40 ft. extension ladder	• Appliance (Residential) • Home Theater (Residential) • Personal Computer (Residential) • Commercial
Pegasus 2 way	No longer used	No longer used
Large Delivery	Technician is capable of performing delivery of equipment; has cargo van, box truck, enclosed trailer, transport ("Sprinter") van	• Appliance (Residential) • Home Theater (Residential) • Personal Computer (Residential) • Commercial

Job Skill	Definition	Job Types Skill Applies to
Custom 1	No longer used	No longer used
Off Air Antenna	Technician is capable of installing antennae for over-the-air TV signals; indoor or outdoor	Home Theater (Residential)
Basic PC with Data	Technician is capable of performing basic PC set-ups; setting up hardware/peripherals, parts replacement, email, wired internet connection, software installation (including security software), data migration, data back-up, virus and spyware removal	Personal Computer (Residential)
PowerBridge	Technician has completed PowerBridge training course and passed PowerBridge exam on Installs elearning website	Home Theater (Residential)
Commercial PC and Printer	Technician is capable of performing basic PC set-ups at a commercial site; setting up hardware/peripherals, email, wired internet connection	Personal Computer (Commercial)
Commercial Software	Technician is capable installing software at a commercial site	Personal Computer (Commercial)
Electrician	Technician is a licensed electrician	• Appliance (Residential) • Home Theater (Residential) • Personal Computer (Residential) • Commercial
Security Camera	Technician is capable of installing CCTV security camera systems; DVR set-up, remote IP access	• Audio Visual (Residential) • Audio Visual (Commercial)
In Home Consultation	Technician is capable of performing a consultation in the customer's home to determine product needs and installment feasibility	• Appliance (Residential) • Home Theater (Residential)
Dishwasher Permit	Technician has met any local regulatory requirements for installing dishwashers and is capable of obtaining permits for dishwasher installations.	• Appliance (Residential) • Commercial
Flat Panel TV Repair	Technician is capable of flat panel TV diagnostic and part replacement jobs.	Flat Panel TV Repair
Mattress Delivery	Technician is capable of picking-up, transporting, delivering, and setting up mattresses, box springs, and bed frames of all sizes, from twin to California King.	Home Services (Mattresses)
Level 1 Certification	No longer used	No longer used
DirecPc	No longer used	No longer used
Home Theater A/V	Technician is capable of performing basic home theater installations; on-stand TV set-up, basic sound system set-up, no concealment	Home Theater (Residential)

Job Skill	Definition	Job Types Skill Applies to
Commercial	Technician is capable of performing commercial installations; AV, PC, IT, Security	Commercial
Fulfillment Capable	Technician is capable of storing product for future installations	• Appliance (Residential) • Home Theater (Residential) • Personal Computer (Residential) • Commercial
Digital Jukebox	No longer used	No longer used
Small Delivery	Technician is capable of delivering small products; TVs under 32", PCs, components	• Appliance (Residential) • Home Theater (Residential) • Personal Computer (Residential) • Commercial
Custom 2	No longer used	No longer used
Wall Fishing	Technician is capable of running cable in walls; cable TV, satellite, whole-house wiring, commercial cabling	• Home Theater (Residential) • Commercial
PC Wireless	Technician is capable of setting up wireless networking; wireless networks, routers, basic network security	• Personal Computer (Residential) • Personal Computer (Commercial)
3 Man Crew	Technician is available for jobs that require three installers at once	• Appliance (Residential) • Home Theater (Residential)
Commercial Projector	Technician is capable of installing projectors; ceiling-mounted projectors, free-standing screens, mounted projection screens, concealed projection screens in a commercial setting	Audio Visual (Commercial)
Commercial Telecom	Technician is capable of installing commercial phone systems; call routing, voice-over IP	Commercial
Gas Appliance	Technician is capable of performing gas appliance installations	Appliance (Residential)
Commercial IT Survey	Technician is capable of performing an IT site survey in the customer's commercial setting to determine product needs and installment feasibility; tech has advanced IT skills	Information Technology (Commercial)
Waterline Permit	Technician has met any local regulatory requirements for installing waterlines and is capable of obtaining permits for waterline installations.	• Appliance (Residential) • Commercial
Major Appliance Repair	Technician is capable of major appliance diagnostic and part replacement jobs	Major Appliance Repair

APPENDIX II: ESCALATION STATUS DEFINITIONS AND ASSESSMENTS

Penalties

Expectation: Installs expects that you will arrive for each accepted job as scheduled and perform the job as outlined. When those expectations are not met, you may be assessed a financial penalty.

Closed Reason for Escalation	Penalty Charged if	Assessment
Technician – Tech No Call No Show	You did not show up for the accepted job as scheduled AND you did not notify Installs that you were not going to make the appointment.	SKU rate
Technician – Short Notice	You declined a previously accepted job (via DOLI or phone call to Installs) after 4:00pm local time the day before the job was scheduled.	$25
Technician – Missed Appointment Window	Customer reports that you arrived for a job after the appointment window end time.	$15
Tech Company – Failure to Update DOLI	• You did not **upload completed Consultation Forms** to DOLI the **SAME DAY** you performed the consult. *OR* • You did not **update or close out jobs** in DOLI within **THREE (3) DAYS** of the appointment.	$25

Other Closed Escalation Reasons

Closed Reason for Escalation	Definition	Assessment
Tech Company – Refusal To Warranty	Installer company refuses to warranty their installation (1 Year).	Costs to correct issue
Tech Company – Provided Defective Equipment	Installer company refuses to replace defective equipment within warranty period; excludes equipment provided by client or Installs.	Costs to correct issue
Technician – Damage To Property	Technician caused damage to customer's property/product.	Costs to correct issue
Technician – Substandard Installation	Technician's installation was not completed to professional standards of quality.	Costs to correct issue
Technician – Unprofessional – DID NOT FOLLOW PROCESS	Technician did not follow process (Did not give an estimated time of arrival, tech collected monies from customer without prior approval from Installs, took equipment offsite when not outlined in SOW, etc.).	Costs to correct issue
Unresponsive	You did not respond to Installs within 24 business hours of the initial message from Installs about an opened escalation.	Contract Review
Technician – Unprofessional – BEHAVIOR	Technician did not demonstrate professional behavior while onsite.	Contract Review

APPENDIX III: FREQUENTLY ASKED QUESTIONS

1. **What software do I need in order to run DOLI?**

   DOLI operates best on Internet Explorer 5.5 and above, preferably version 7 or higher. If you do not have a current version of Internet Explorer, click the link provided on the DOLI login screen to download a free version from www.microsoft.com.

   Figure 177

2. **What happens to my orders if my computer crashes?**

   Orders reside in the web-based DOLI system, not on your computer. If your computer crashes, your orders are still in DOLI. You may simply log in to DOLI using another computer.

   You are expected to maintain your equipment, including your PC, in order to continue to receive work from Installs. It is your responsibility to maintain access to a back-up computer, if your primary PC becomes inoperable.

3. **Who do I contact if my technicians are having technical problems accessing the system that I cannot resolve?**

   Contact the Installs Field Relations Department at 1-888-490-4321, option 3 for assistance.

4. **Can I get my work orders via email or fax?**

   No, all work orders are routed exclusively through the DOLI system.

5. **How will I know when work orders have been assigned to me?**

   Work orders will appear in DOLI on the "My Orders" screen in the category "Scheduled – Dispatched." It is good practice to check DOLI frequently, especially when you are first getting established with Installs.

6. **How do I know if there is a problem with an installation after one of my technicians has completed the order that may affect my getting paid for the job?**

   If such a problem is reported to Installs, you will see it as an Escalation, and/or you may be contacted by an Installs representative to discuss.

7. **Am I responsible for acquiring my own equipment, or will Installs provide it to me?**

   You are responsible for acquiring all the tools you need to do work for Installs.