



Staples

Service Provider Guide

Revised: 27 April 2017

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

CONFIDENTIAL NOTICE

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

COPYRIGHT NOTICE

Copyright © 2013 INSTALLS inc, LLC. All rights reserved. This Manual may not be copied, transferred, reproduced, or duplicated without the prior written consent of INSTALLS inc, LLC. The Manual and all of its contents are proprietary information of INSTALLS inc, LLC and are protected by the Copyright laws of the United States and International Treaties.

Table of Contents

About Staples Services	3
Service Provider Dress Guidelines for Staples Work	3
Requirements	3
Not Acceptable	4
Ordering Installs Polo Shirts	5
Contacting Installs	6
30-Minute Customer Call Ahead	6
Onsite	6
Customer Not Home Policy	6
Inspecting the Site and Equipment.....	6
Wrong, Damaged, or Defective Equipment; Missing Parts	6
Technical Difficulties	7
Customer Data.....	7
Customer requests work outside of the Scope of Work	7
Removing Equipment from the Customer's Home	7
Closing the Job in DOLI	7
Submitting Paperwork for Payment	8
<i>Uploading Paperwork to DOLI</i>	<i>8</i>
<i>Emailing Paperwork to Installs</i>	<i>9</i>

ABOUT STAPLES SERVICES

Installs servicers will perform computer device setup and virus removal/repair for Staples customers.

SERVICE PROVIDER DRESS GUIDELINES FOR STAPLES WORK Requirements

All Installs Staples Service Providers are required to follow the dress guidelines outlined below:

GENERAL APPEARANCE:

Professional appearance, style, and hygiene

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

HATS:

No hats

INSTALLS-ISSUED IDENTIFICATION BADGE:

Not required at this time

SHIRTS:

Clean, appropriately sized collared polo shirt with Installs logo

Note: See the “Ordering Installs Polo Shirts” section in this document

PANTS:

Clean and appropriately sized slacks or khaki pants; no jeans

SHOES:

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

COLD WEATHER:

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

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



Not Acceptable

The following items are unprofessional and may pose safety hazards. These items are not allowed at any time on any Staples job; do not wear these items to stores or to customer homes.

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



Ordering Installs Polo Shirts

You can order Installs Polo shirts via DOLI.

1. Log in to DOLI with your administrative username and password.
2. Click the **ORDER SHIRTS** button on the main navigation panel of the DOLI homepage.
3. Compile and submit your order. Please note that the shirt prices displayed include shipping.



Shirt prices range from \$17 to \$25 per shirt, depending on the size. Each servicer who works on Staples jobs should have at least one Installs polo shirt; servicers who frequently work Staples jobs should have multiple shirts. To simplify the payment process and ease the impact of the expense, Installs will deduct the cost of your shirt order(s) from your tech pay.

CONTACTING INSTALLS

Most issues you encounter on the job can be reported to Installs via the Installs Mobile App. (Please see the [Installs Mobile App document](#) in the Manuals section of DOLI). All questions and issues that required immediate attention can be called into the Installs call center at 1-888-490-4321.

30-MINUTE CUSTOMER CALL AHEAD

- On the day of the job, call the customer on the order 30 minutes before your arrival to confirm your ETA.
- Update the Pre-Call step in the Installs Mobile App documenting the ETA provided to the customer.

ONSITE

Customer Not Home Policy

If you arrive at the customer's location and they do not respond to your attempts to make contact, perform the following steps:

1. Wait 15 minutes; call all available numbers for the customer on the *Installs Installation Workorder*.
2. If you make successful contact with the customer, work with them to determine if the service can be completed as scheduled.
3. If you unable to reach the customer or the customer is not available for the appointment, update the job in the Installs Mobile App. From the Onsite step, update the status to **Customer Not Home**. This will update the job in DOLI and no call to Installs is required.

Inspecting the Site and Equipment

Inspect the installation site with the customer **before** beginning the installation. Ensure the customer has the appropriate internet connection and that you have access the work area. If there are any obstacles, ask the customer to move those items out of the way.

Also, inspect the equipment onsite with the customer before beginning the installation. Ensure that customer agrees that there is no damage. Ensure that all necessary items are included. Plug in and turn on any new equipment prior to installation to make sure it is working and not damaged in any way.

Wrong, Damaged, or Defective Equipment; Missing Parts

As you are preparing to begin the installation, inspect the equipment thoroughly to ensure that there is no damage and that it is the correct unit.

- If there are damaged, defective equipment, or missing parts, notify the customer of the issue. Be professional and show empathy for the customer's situation.
 - Advise the customer to contact Staples about the wrong, damaged, defective, or missing items.
 - Call Installs from onsite
 - Inform the agent, in detail, why you were unable to perform the service when updating the Onsite step in the app.

Technical Difficulties

If at any time you are unable to perform the installation due to technical issues, call Installs from onsite. Provide the details of the problem you have encountered. The Installs agent will advise you of the next steps.

Customer Data

It is important to be mindful of the customer's privacy when performing a computer repair or data transfer. It may be necessary to view the customer's files to ensure they are correct and present. However, you should not spend more time than is necessary more than verify that the files are there and are working. This data is customer's property and all Installs servicers are expected to show respect for the customer and his/her property at all times.

Customer requests work outside of the Scope of Work

If at any time the customer request services outside of the Scope of Work, call Installs for the next steps at 1-888-490-4321 immediately. Installs will follow the Staples process to update the SKUs on the order. Servicers should not sell any services to the customer.

Servicers are able to sell hardware to the customer, but only to facilitate the completion of the service while onsite. If possible, we should advise the customer to purchase the necessary equipment from Staples.

Removing Equipment from the Customer's Home

We will never under any circumstances remove the computer or any other device from the customer's home. This is to ensure the integrity of the customer's data. If the customer needs to dispose of a device, they should be referred to the appropriate recycling center.

CLOSING THE JOB IN DOLI

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

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

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

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

3. From the **Completion Date** drop-down lists, select the month, date, and year you are closing out the order.
4. Enter any comments related to the order closeout in the **Add/Edit Notes** field.

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

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

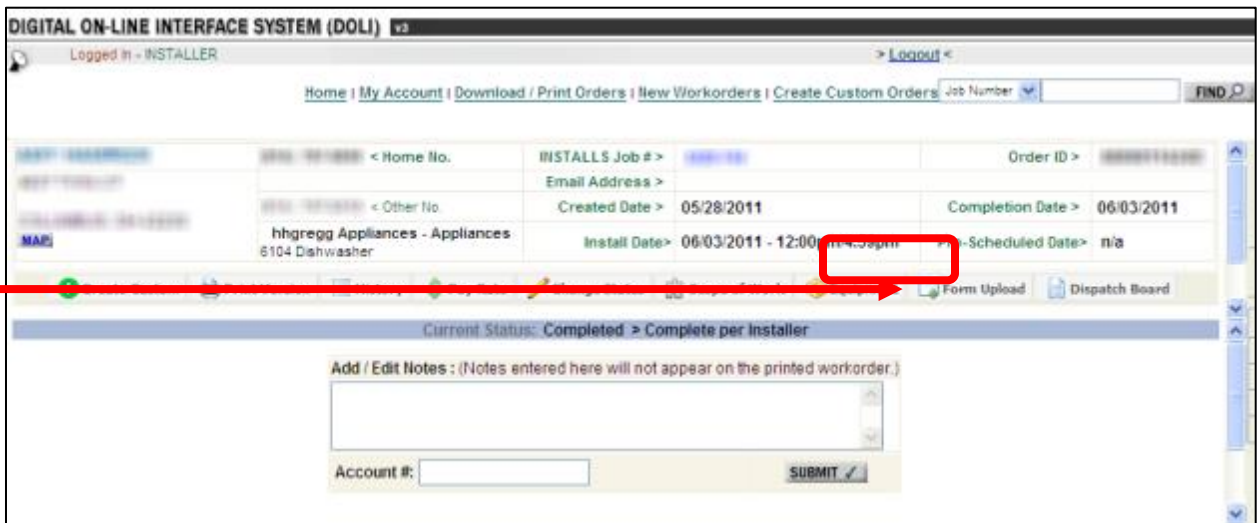
Note: This closes the job.

Submitting Paperwork for Payment

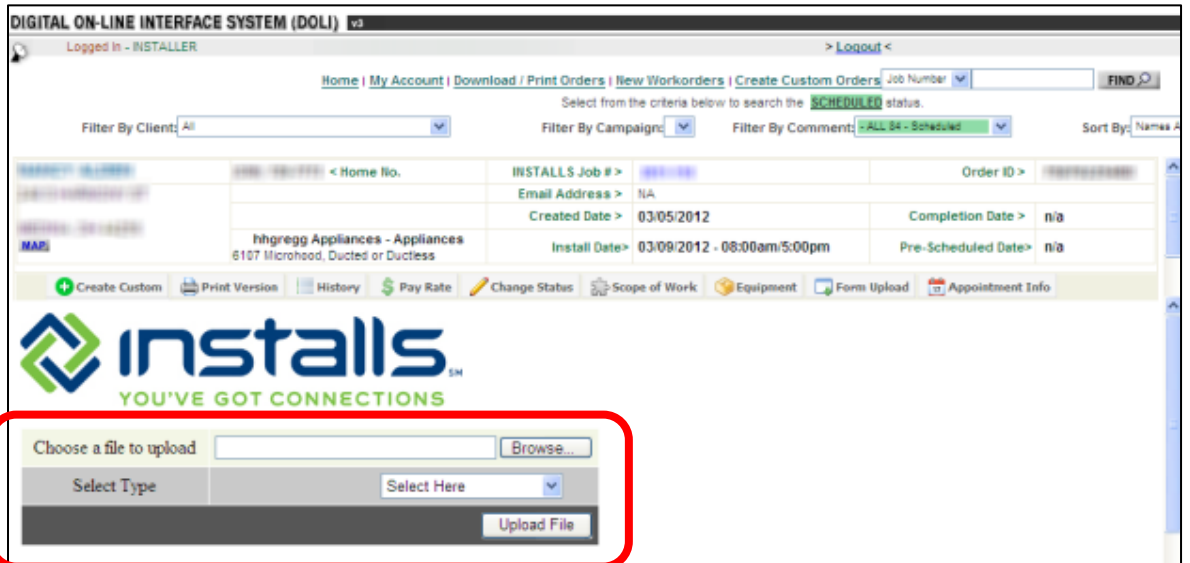
Note: Please use **one** of the following methods to submit paperwork to Installs for payment. Please do not submit the same paperwork by more than one method unless Installs asks you to do so.

Uploading Paperwork to DOLI

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



Note: This displays the *Form Upload* screen.



- Click the **Browse** button.

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

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

- d. Click the **Open** button on the *Choose File to Upload* dialog box.

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

- e. From the **Select Type** drop-down list, select **Accounting Paperwork**.

- f. Click the **Upload File** button.

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

File Name:	Modified Date:	File Label:	Remove File
1000-2012-02-01.pdf	2012-02-01	Click here for file or right click and Save As	Remove File

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

Emailing Paperwork to Installs

Only if you are unable to upload the paperwork to DOLI, email scanned PDF version of your completed, customer signed paperwork to paperwork@installs.com.