

Managing Technicians in DOLI

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

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THE IMPORTANCE OF MAINTAINING TECHNICIAN INFORMATION WITH INSTALLS

Background Checks

Installs performs background checks on every technician and helper an installer wants to use for Installs work. Background checks are required to ensure the safety of our customers and their investments, and to protect the assets and reputations of the Installs network and our clients.

Installs uses a third-party company to screen all potential technicians during the installer onboarding process. Installers **must** notify Installs Field Relations team when they wish to assign a new technician to Installs jobs so we can run a background check on the new tech. The required background checks run by Installs include criminal and driving record checks.

Installs does not allow installers to use technicians who have failed an Installs background check, or technicians who have not been background checked by Installs. Such individuals can pose high-risk threats to Installs' business, our clients' reputations, our customers' safety and property, and your company's credibility.

Keeping Technician Information Current in DOLI

Installs' DOLI system is the tool that houses all job information and routes work to technicians. Once your technicians pass their Installs background check, you must set up a technician profile for each one in DOLI. Installs will not be able to assign work to your technicians until you enter them into the system; the DOLI system does not know that your technicians exist until you set up their profiles. The "Creating a Technician User Account in DOLI" section of this document walks you through every step you must take to enter a technician into DOLI. To avoid having work routed inappropriately, do not enter helpers into DOLI (but they must be submitted for and pass an Installs background check).

When there is any change in the information you entered into DOLI about your technicians, you must update the technician's profile in DOLI to ensure that jobs and communications are properly routed to him/her. For example, if your technician moves to a new address/starting ZIP Code and you do not update DOLI, the system will continue to send the technician on jobs that may no longer be within his/her coverage area; this may make his/her daily travel schedule difficult. If a technician earns a new certification or job skill, be sure to update DOLI with this information so that the technician will be eligible for work s/he is qualified to perform. If the technician's phone number or email address changes, update the contact information to ensure that the tech receives notifications regarding jobs.

When technicians leave your company, or when you decide that they will no longer work on Installs jobs, you must update their status in DOLI to reflect that they are no longer active Installs technicians. Until you mark the technician as inactive, DOLI will continue to assign jobs to the technician. To avoid missed appointments, you must change the technician's active status in DOLI as soon as you are aware of it. The "Making a Technician Inactive" section of this document walks you through every step you must take to make a technician inactive in DOLI.

Managing Technician Access to DOLI

Installs creates and manages company-level installer usernames and passwords for DOLI. However, installers are responsible for creating and managing technician usernames and passwords for DOLI. As part of the process of setting up a new technician, you will create a DOLI username and password for each of your technicians. Every technician must have a DOLI login to access and update their assigned jobs.



See the "Creating a Technician User Account in DOLI" section of this document for more information.

If *you* lose or forget your company-level installer username or password, contact Installs Field Relations at 1-888-490-4321 for assistance. If the *technician* loses or forgets his/her DOLI username or password, you may look up the



username in DOLI, but you must create a new password for the technician. Neither the installer nor Installs can see or recover lost passwords.

Your company-level installer username and password allows more DOLI access than technician DOLI login. Your technicians will not see the same DOLI screens detailed in this document and the "DOLI Company Manual;" they will have access to a different set of screens, as outlined in the separate "Technician Guide: Digital Online Interface System (DOLI)" document.

See the "DOLI Technician Manual" on your DOLI homepage for more information.

See the "DOLI Company Manual" on your DOLI homepage for more information.

Installer DOLI Login Can:

- View/update job status and notes
- View job scope of work
- Accept orders
- Print work order
- Upload in-home consultation forms
- Download SKU list
- Complete out jobs
- Perform Real-Time Close-outs (RTCO)
- Access training site
- Manage company information
- Manage technicians
- Manage dispatchers
- Reports
- Document store visits
- Decline orders
- Manage escalated orders
- View dispatch board
- Reassign orders to new technicians for same date/appointment window
- Manage non-Installs orders

Technician DOLI Login Can:

- View/update job status and notes
- View job scope of work
- Accept orders
- Print work order
- Upload in-home consultation forms
- Download SKU list
- Complete out jobs
- Perform Real-Time Close-outs (RTCO)
- Access training site



MANAGING TECHNICIANS IN DOLI

Creating a Technician User Account in DOLI

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 failed, or have not had, an Installs background check.**

Step I: Log in to DOLI

- 1. Log in to DOLI using the installer username and password provided to you by the Installs Field Relations team.
- 2. On the Main Navigation Bar on the DOLI homepage, click the MY TOOLS button.

Figure 1

Velcome Velcome	May 1, 2012 > 11:52 AM
Logout	
MY TOOLS 🥜 STORE VISITS 🛐	Account Condition Your account is in good standing
MY ACCOUNT 🔄 ENTER ORDER 🖉	Please click any "Alert" items you see below to deal with the orders appropriately
DISPATCH BOARD 💓 DOWNLOAD / PRINT ORDERS 🗘	Alerts / Notifications
Search (select one)	Cancelled Orders You have 2 cancelled orders within the last 3 days
Job Number 💙 🛛 FIND 🔎	New Orders You have new orders - NOTE: Any new orders unnaccepted within 12 hours will be reassigned to another installer.
Resources Links	Reports
Product Return Form - Appliances Appliances Dishwasher Installation Bracket Ordering	View Now View your closed escalations and create a dispute

3. On the My Information screen, click the TECHNICIANS button.

Home Logout			November 5, 2010 > 02:49 PM
	My Information:		
	Installer ID:	Installer:	Phone:
	MY INFO 🐨	ALL MEDIA CONTINE ARE CARD	PHP _ III
	REPORTS 📾	(active)	10000 7
	ECHNICIANS 🛹	Email:	Fax:
1		#(\/5.000000000000000000000000000000000000	
	NLOAD / PRINT ERS 0	URL (Web Address):	
	OAD SKU LIST 🕸		
			Submit Updated Info
	Change Password	New Password:	Confirm:
	Your password has to have at le characters.	ast 8	
	They can be numbers or letters. (eg.	

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.



Figu	ire 3				
DIGI	AL ON-LINE INTERFACE SY	STEM (DOLI) v3			
Ø	Home Logout			No	ovember 5, 2010 > 02:49 PM
	Ζ	CREATE NEW TECH	INICIAN		
	MY INFO 🐨	First Name	Last Name - (required)	SBCA #	
	TECHNICIANS 🛷				
	DISPATCHERS 💟	Phone	Cell	Pager	
					Submit
	DOWNLOAD / PRINT	Address		Email	
	ORDERS ¢ DOWNLOAD SKU LIST {}		AL 💌		
		ACTIVE TECHNICIA	NS		
		First Name Last Name			
		Mitfield Bergiatio	<u>User Info</u> <u>Regions</u> <u>Shifts</u>	Edit	
		INACTIVE TECHNIC	IANS		
		First Name Last Name			

Step II: Add a technician to your account

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

DIGI	TAL ON-LINE INTERFACE SY	STEM (DOLI) v3			
Ø	Home Logout			Novembe	er 5, 2010 > 02:49 PM
_	MY INFO S REPORTS S TECHNICIANS DISPATCHERS REGION DOWNLOAD / PRINT ORDERS DOWNLOAD SKU LIST E	CREATE NEW TECH	Last Name - (required) Cell AL V NS User Info Regions Shifts	Pager	Submit
		First Name Last Name			

- 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.

5. 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 5	
----------	--

9	Home Logout					December 12, 2011 > 10:42 AM
Z	MY INFO 🛞	CREATE NEW T		1		I
0	REPORTS 1	First Name	Last Name - (requi	ed) SBCA #		
		Phone	Cell	Pager		
					Submit	
V	DOWNLOAD / PRINT	Address		Email		
	DOWNLOAD SKU LIST &		AL 🖌			
		ACTIVE TECHN	NICIANS			
2		First Name Last		and the state		
		weighter, weighter	User Info Regi	ons <u>Shifts</u> <u>Edit</u>		
		INACTIVE TEC	HNICIANS			
		First Name Last 1				
		BEN JONES	User Info Region	ns <u>Shifts</u> <u>Edit</u>		



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

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

Figure 6

9	Home Logout					December 12, 2011 > 10:42 Al
Z		CREATE NEW T	ECHNICIAN			
0	MY INFO 🌚	First Name	Last Name - (required)	SECA #		
	REPORTS 🚳					
	TECHNICIANS A	Phone	Cell	Pager		
	DISPATCHERS []				Submit	
	DOWNLOAD / PRINT	Address		Email		
O	ORDERS 0 DOWNLOAD SKU LIST (1)					
_	DOWNLOAD SND LIST CU		AL 🖌			
ΛV		ACTIVE TECHN	VICIANS	-		
		First Name Last	Name			
2		AND DECK	User Info Regions	Shifts Edit		
		INACTIVE TECH	HNICIANS			
		First Name Test N	Name			
		BEN JONES	User Info Legions S	Shifts Edit		

Note: This displays the Edit Technician Login screen.

Figure 7

DIGITAL ON-L	LINE INTERFACE SY	(STEM (DOLI) V3			
M Home	Logout				December 12, 2011 > 10:42 AM
-					
		EDIT TECHNICIAN L	OGIN		
2					
	MY INFO 🚳	Tech Name:	SP ID:		
0	REPORTS 🚳	JONES, BEN	111-999		
	TECHNICIANS 🛹	UserName	Password	Active	
	DISPATCHERS 📝			O Yes modify	
< ∠	REGION 🛁			⊙ No	
	DOWNLOAD / PRINT ORDERS	<u>< Back</u>			
0	DOWNLOAD SKU LIST 🕀				

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 simply a unique identifier DOLI automatically assigns to each technician.

- 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.

Installs recommends that you consider using the technician's work email address (e.g. name@domain.com) as the technician's DOLI username.

- 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 loses 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 8

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DIGI	TAL ON-LINE INTERFACE S				
9	Home Logout				December 12, 2011 > 10:42 AM
	z	EDIT TECHNICIAN	LOGIN		
	MY INFO INFO	Tech Name:	SP ID:		
	REPORTS 🐨	IONES BEN	111.000		
	TECHNICIANS 🛹	UserName	Password	Active	
	DISPATCHERS D	hinner] [Yes modify	
1	REGION 📥	bjones			
		< Back			
	DOWNLOAD SKU LIST (A				

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

CREATE NEW TECHNICIAN	DIGITAL ON-LINE INTERFACE S	YSTEM (DOLI) v3				December 42, 2014 - 14/52 All
MY INFO INFO INFO INFO INFO INFO INFORMATION IN	B Home Logout					December 12, 2011 > 11:52 Al
MY INFO S First Name Last Name - (required) SBCA # REPORTS S Phone Cell Pager Disparchers S Cell Pager Submit REGION Address Email Submit DOWNLOAD PRINT ORDERS C AL AL Email ACTIVE TECHNICIANS First Name Last Name Email	2	CREATE NEW TECH	INICIAN			
TECHNICIANS Phone Cell Pager DISPATCHERS Address Email DownLOAD / PRINT ORDERS Address Email DownLOAD / SKU LIST & AL AdL ACTIVE TECHNICIANS First Name Last Name	MY INFO 1	First Name	Last Name - (required)	SBCA #		
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REGION Address Email DOWNLOAD / PRINT ORDERS AL DOWNLOAD SKU LIST & AL		Phone	Cell	Pager		
DownLoad / PRINT ORDERS Address Email DownLoad sku List (%) AL Image: Comparison of the second					Submit	
ORDERS 2 DOWNLOAD SKU LIST (%) AL ACTIVE TECHNICIANS First Name		Address		Email		
ACTIVE TECHNICIANS First Name Last Name	ORDERS 🗘					
ACTIVE TECHNICIANS First Name Last Name	DOWNLOAD SKU LIST OF		AL 🗸			
First Name Last Name		ACTIVE TECHNICIA	NS			
<u>User Info</u> <u>Regions</u> <u>Shifts</u> <u>Edit</u>		First Name Last Name				
BEN JONES <u>User Info</u> <u>Regions</u> <u>Shifts</u> <u>Edit</u>	Z	1.000				

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 IV: Set up geographic areas technician will work

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

Figure 10

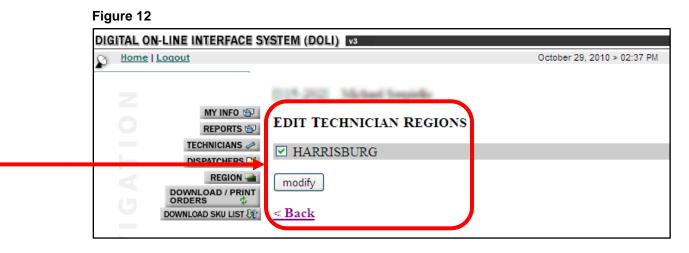
DIGITAL ON-LINE INTERFACE S	YSTEM (DOLI) v3				December 12, 2011 > 11:52 AM
z	CREATE NEW TECH	INICIAN			
MY INFO 🚳	First Name	Last Name - (required)	SBCA #		
TECHNICIANS 🖉	Phone	Cell	Pager		
DISPATCHERS D	Phone	Cell	Pager	Submit	
REGION a	Address	J <u>I</u>	Email		
ORDERS 🗘					
DOWNLOAD SKU LIST 🕅		AL 💌			
	ACTIVE TECHNICIA	NS			
<	First Time Last Name				
Z	BEN JONES		ts Edit ts Edit		

Note: This displays the Edit Technician Regions screen.

Figure 11		
DIGITAL ON-LINE INTERFACE S	YSTEM (DOLI) V3	
Mome Logout		October 29, 2010 > 02:37 PM
MY INFO 🔄	EDIT TECHNICIAN REGIONS	
REPORTS 🚱 TECHNICIANS 🥔 DISPATCHERS 💱	HARRISBURG	
	modify	
DOWNLOAD SKU LIST &	< <u>Back</u>	

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.





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 V: Set up shifts technician will work

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

Figure 13

DIGITAL ON	LINE INTERFACE SY	STEM (DOLI)	v3						
Mome	e Logout								December 12, 2011 > 11:52 AM
z		CREATE N	NEW TECH	NICIAN					
	MY INFO 🗐	First Name		Last Name - (required)	SBCA #			
	REPORTS 🚳								
	TECHNICIANS 🥔	Phone		Cell		Pager			
	DISPATCHERS 📝							Submit	
	REGION 🛁	Address				Email			
	DOWNLOAD / PRINT ORDERS								
	DOWNLOAD SKU LIST 🕸			AL 💌					
>		ACTIVE T	ECHNICIA	NS					
		First Name	Last						
		-	1001000		egions Shif				
		BEN	JONES	<u>User Info</u> Re	eg.on Shif	<u>is Edit</u>			

Note: This displays the Edit Technician Shifts screen.

Figure 14

TAL ON-LINE INTERFACE SY	STEM (DOLI)	v3								
Home Logout								Novemb	per 8, 2010 > 11:30 AM	
	01F-0002 - 9	661866								
MY INFO 🚱 REPORTS 🚳	EDIT TECH	NICIAN	N SHIFT	rs						
TECHNICIANS 🛹	Shift	Mon	Tue	Wed	Thur	Fri	Sat	Sun		
DISPATCHERS 📝	8 AM - 12 PM									
REGION 🛁	12 PM - 5 PM									
ORDERS	5 PM - 9 PM									
DOWNLOAD SKU LIST 以	Modify							,	1	
	SCHEDULE	FUTUF	RE UNA	VAILA	BILITY					
	Date Shift Period Reason									
	1 V 1 V 2010 V 8 AM - 12 PM V NOT WORKING V Submit									
	LIST OF FU	TURE	UNAVA	ILABII	.ITY					
	Date Time F	eason S	chedule	d On Sch	eduled B	^{by}				
	LIST OF PA	ST UN	AVAIL	ABILIT	Z					
	Date Time F < Back	eason S	chedule	d On Sch	eduled B	ły				
	Home Logout	Home Logout MY INFO REPORTS IDISPATCHERS DOWNLOAD / PRINT DOWNLOAD / PRINT DOWNLOAD SKU LIST (F) Date I LIST OF FU Date Time R LIST OF PA Date Time R	MY INFO TECHNICIANS REPORTS TECHNICIANS DISPATCHERS IV DOWNLOAD / PRINT ORDERS DOWNLOAD SKU LIST UN DOWNLOAD SKU LIST UN Date Shift Modify SCHEDULE FUTURE Date Shift SCHEDULE FUTURE Date Shift Modify SCHEDULE FUTURE Date Shift Shift Modify SCHEDULE FUTURE Date Shift Shift Modify	MY INFO Image: Constraint of the second state of the second	My INFO Image: Construction of the second of the secon	MY INFO TECHNICIAN SHIFTS TECHNICIANS CONSTRUCTION DISPATCHERS CONSTRUCTION DISPATCHERS CONSTRUCTION DOWNLOAD / PRINT CORDERS DOWNLOAD SKU LIST CONSTRUCTION DATE DAT	Myr INFO S EDIT TECHNICIAN SHIFTS IECHNICIANS C Shift Mon Tue Wed Thur Fri DISPATCHERS V Shift Mon Tue Image: Shift Period Imag	Home Logout Image: Solution of the second structure of the	Home Locout Novemb MY INFO S EDIT TECHNICIAN SHIFTS EDIT TECHNICIAN S Shift Mon Tue Wed Thur Fri Sat Sun DISPATCHERS [2] Shift Mon Tue Wed Thur Fri Sat Sun DISPATCHERS [2] Shift Mon Tue Wed Thur Fri Sat Sun DOWNLOAD / PRINT Shift Mon Tue Wed Thur Fri Sat Sun DOWNLOAD / PRINT Shift Mon Tue Wed Thur Fri Sat Sun DOWNLOAD / PRINT SPM - 9 PM DOWNLOAD SKU LIST (2) Modify SCHEDULE FUTURE UNAVAILABILITY Date Shift Period Reason 1 V 8 AM - 12 PM NOT WORKING Submit 2010 V NOT WORKING Submit LIST OF FUTURE UNAVAILABILITY Date Time Reason Scheduled On Scheduled By LIST OF PAST UNAVAILABILITY Date Time Reason Scheduled On Scheduled By	Home Logout November 8, 2010 > 11:30 AM MY INF0 T EDIT TECHNICIAN SHIFTS TECHNICIANS T Shift Mon Tue Wed Thur Fri Sat Sun BISPATCHERS T DISPATCHERS T Shift Mon Tue Wed Thur Fri Sat Sun BISPATCHERS T DISPATCHERS T Shift Mon Tue Wed Thur Fri Sat Sun BISPATCHERS T DISPATCHERS T Shift Mon Tue Wed Thur Fri Sat Sun BISPATCHERS T DISPATCHERS T Shift Mon Tue Wed Thur Fri Sat Sun BISPATCHERS T DOWNLOAD KRU LAST T Modify DOWNLOAD SKU LIST OF DOWNLOAD SKU LIST OF FUTURE UNAVAILABILITY Date Time Reason Scheduled On Scheduled By LIST OF PAST UNAVAILABILITY Date Time Reason Scheduled On Scheduled By

This feature 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.



DIGITAL ON-LINE INTERFACE SY	(STEM (DOLI)	v3							
Bone Logout								Novembe	er 8, 2010 > 11:30 A
Z	317-0032 9	1001000							
MY INFO 🚳	EDIT TECH	INICIAI	N SHIF	rs.					
	EDIT IECH	INICIAI	, Shir	1.5					
	Shift	Mon	Tue	Wed	Thur	Fri	Sat	Sun	
DISPATCHERS V	8 AM - 12 PM								
	12 PM - 5 PM								
DOWNLOAD / PRINT ORDERS	5 PM - 9 PM								
DOWNLOAD SKU LIST	Modify)
>		E							
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<	Date	Shift	Period		Reaso	n			
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	1 💌	8 AM - 1	12 PM 💌	NOT W	ORKING		S	Submit	
	2010 🛩								
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	LIST OF PA	ST UN	AVAIL		v				
	LIST OF FF	ST UN	AVAIL	ADILII					
	Date Time F	Reason S	chedule	d On Sch	eduled B	y			
	< Back								



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

- 9. Stay on the Edit Technician Shifts screen.
- 10. 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.

See the "Shift Exceptions" section of this document for more information.

- a. Select the Date, Shift Period, and Reason from the drop-down lists provided.
- b. Click the Submit button to save the Future Unavailability.
- c. Click the Back link to return to the Create New Technician screen.

Figure 16

DIGITAL C	DN-LINE INTERFACE S	YSTEM (DOLI)	v3							
S Home	e Logout								Novemb	er 8. 2010 > 11:30 AM
		017-002 4	101101							
	MY INFO 🐨 REPORTS 🐨	EDIT TECH	NICIA	N SHIFT	ſS					
	TECHNICIANS 🥔	Shift	Mon	Tue	Wed	Thur	Fri	Sat	Sun	
	DISPATCHERS 📝	8 AM - 12 PM								
	REGION 🛁	12 PM - 5 PM								
	DOWNLOAD / PRINT ORDERS	5 PM - 9 PM								
	DOWNLOAD SKU LIST 🕅	Modify			1		1	1		I
		SCHEDULE	FUTU	RE UNA	VAILA	BILITY				
		Date		Period		Reas				-
			Shire	rei iou		Rease	<i>/</i> 11			-
		1 ¥	0.000		NOTW			v s	ub an it	
		2010 🗸	8 AIVI - 1	12 PM 🚩		ORKING			ubmit	
		2010								
		LIST OF FU	TURE	UNAVA	ILABII	.ITY				
		Date Time F	loncon F	abadula	l On Cal	adulad T				

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

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

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

S Hom	ne Logout					December 12, 2011 > 1
Z		CREATE NEW TE	CHNICIAN			
	MY INFO 🐨	First Name	Last Name - (required)	SBCA #		
0	REPORTS 🚳					
	TECHNICIANS 🛹	Phone	Cell	Pager		
	DISPATCHERS 📝				Submit	
	REGION 🛁	Address	<i>ŋ</i>	Email	·	
U	DOWNLOAD / PRINT ORDERS					
	DOWNLOAD SKU LIST 🕅		AL 🗸			
and a second sec						
		ACTIVE TECHNIC	CIANS			
4		First Name Last				
2			User min Pagions Shif	te Edit		
		BEN JONES	User Info Regions	Edit		

Note: This displays the *Edit Technician* screen.



4 ---

	EDIT TECHNICIAN			
MY INFO 👘	First Name	Last Name - (required)	SBCA #	
REPORTS 🚳				
TECHNICIANS 🛹	Phone	Cell	Pager	
DISPATCHERS 💟				
REGION 🛁	Address		Email	/
DOWNLOAD / PRINT ORDERS				
DOWNLOAD SKU LIST 🕅		PA 💌		
	Starting Zipcode:		Efficiency:	
	Ending Zipcode:		Maximum Travel Time:	45 Minutes 💌
		Submit Edit T	echnician	

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	Efficiency
Value	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	d 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 about 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.

[Ζ		EDIT TECHNICIAN			
		MY INFO 🐨	First Name	Last Name - (required)	SBCA #	
		TECHNICIANS 🛹	Phone	Cell	Pager	
		DISPATCHERS D REGION	Address		Email	
	U	ORDERS				
		DOWNLOAD SKU LIST 🕅		PA 🔽		
			Starting Zipcode:		Efficiency: Maximum Travel	
			Ending Zipcode:		Time:	45 Minutes 💌
				Submit Edit T	ecnnician	



Step VIII: Set up technician's Job Skills and Client Skills

- 12. Stay on the Edit Technician screen.
- 13. Under Job Skills, click the checkbox corresponding to each Job Skill the technician possesses.

See the "Appendix I: Job Skills Definitions" section of this document for more information.

- 14. Under Client Skills, click the checkbox corresponding to each Client Skill the technician possesses.
 - **Note:** The majority of Installs' clients fall under the "Generic Third Party" client skill. If a client has specific requirements regarding the way jobs are assigned to installers, additional skills may be displayed; if you see a specific Client Skill, your company has been set up by Installs to do work for that client. Check all Client Skills displayed on each technician to maximize their opportunities for work assignments.
- 15. Click the **Submit Job and Client Skills** button to save the changes.

Figure 20

Mome Logout			
	JOB SKILLS		
MY INFO 🐵	JOB SKILLS		
REPORTS 🚳	Service Call	Uninstall	In Home Consultation
TECHNICIANS 🛹	Projector	QC Job	Level 1 Certification
DISPATCHERS 💟	Level 2 Certification	Dish 500	DirecPc
REGION 🛁	Starband	Direcway	Home Theater A/V
DOWNLOAD / PRINT ORDERS	Custom Home Theater	Prime	Commercial
DOWNLOAD SKU LIST	UltimateTV	40 ft Ladder	Fulfillment Capable
	Plasma Installs	Pegasus 2 way	Digital Jukebox
>	XM/Sirrus	Large Delivery	Small Delivery
4	2 Man Crew	Custom 1	Custom 2
Z	Custom 3	🔲 Off Air Antenna	🔲 Wall Fishing
	Basic PC Install	Basic PC with Data	PC Wireless
	Calibration	PowerBridge	🔲 3 Man Crew
	Commercial Flat Panel	Commercial PC and Printer	Commercial Projector
	Commercial Server	Commercial Software	Commercial Telecom
	Appliance Installation	🗖 Electrician	Gas Appliance
	🗖 Gas Permit	Security Camera	Commercial IT Survey
	Commercial A/V Survey	Dishwasher Permit	🔲 Waterline Permit

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.



Updating an Existing Technician Account in DOLI

- 1. To edit an existing active or inactive technician, perform the following steps:
 - a. On the *Create New Technician* screen, click the link next to the technician's name that corresponds to the type of change you want to make.

2	_		November 1, 2010 > 11:
z	CREATE NEW T	ECHNICIAN	
MY INFO	riist Name	Last Name - (required)	SBCA #
REPORTS			
TECHNICIANS	Phone	Cell	Pager
DISPATCHERS			
REGION DOWNLOAD / PRI	Address	7	Email
ORDERS C			
DOWNLOAD SHO LIST	-Uû	AL 🗸	
>	ACTIVE TECHN	ICIANS	
×	First Name Last Na	me	
Z	ALTRIAL CONTRACTOR	<u>User Info</u> <u>Regions</u> <u>Shifts</u>	
	(1946) Birilasi	User Info Regions Shifts	
	Tables Witness	<u>User Info</u> <u>Regions</u> <u>Shifts</u> <u>User Info</u> <u>Regions</u> <u>Shifts</u>	
	NUMBER OF STREET	User Into Regions Sints	Edit

i. To update the technician's username, password, or Active status, click the User Info link.

See the "Making a Technician Inactive" section of this document for more information before setting a technician's Active status to "No."

- ii. To update the technician's coverage region(s), click the **Regions** link.
- iii. To update the schedule the technician works or to schedule future unavailability for a technician, click the **Shifts** link.
- iv. To update the technician's contact information, Job Skills, or Client Skills, click the Edit link.
- b. Make the necessary changes on the screen you selected.
- c. Click the Modify or Submit button on the selected screen.
 - **Note:** Screens that have multiple sections may have multiple **Modify** or **Submit** buttons. Be sure to click the button that corresponds to the action you are performing.



Making a Technician Inactive

When technicians leave your company, or when you decide that they will no longer work on Installs jobs, you must update their status in DOLI to reflect that they are no longer active Installs technicians. Until you mark the technician as inactive, DOLI will continue to assign jobs to the technician. To avoid missed appointments, you must change the technician's active status in DOLI as soon as you are aware of it.

You must complete this multi-step process to mark technicians as inactivate when they leave your company or when they are removed from Installs work. You must complete the steps in the order they are presented.

Step I: Check DOLI for jobs scheduled to technician in the future

1. On the DOLI homepage, click the My Account button.

Figure 22	
-----------	--

DIGITAL ON-LINE INTERFACE SYSTEM (DOLI)	3
Welcome	May 1, 2012 > 11:52 AM
Logout MY TOOLS مربع STORE VISITS	Account Condition Your account is in good standing
MY ACCOUNT 🔄 ENTER ORDER	Please click any "Alert" items you see below to deal with the orders appropriately.
	DERS Alerts / Notifications
Search (select one)	Cancelled Orders You have 2 cancelled orders within the last 3 days
Job Number V	New Orders You have new orders - NOTE: Any new orders unnaccepted within 12 hours will be reassigned to another installer.
Resources Links	Reports
Product Return Form - <u>Appliances</u> <u>Newl Product Return</u> <u>Dishwasher Installatio</u> <u>Bracket Ordering</u> Installs Announces Ne	View Now View your closed escalations and create a dispute

Note: This displays the My Orders screen.

Figure 23

GITAL ON-LINE IN		(STEM (DO	LI) v3				HELP?		
Logged In - INSTALL	ER			> <u>Loqout</u> <					
		ne Downloa	d / Print Orders New Wor	korders Create Custom C)rders				
	All Clients		Y Phone	*	FIND	Q			
Clients Order Statuses									
CLIENT: INSTA	LLS inc								
Prescheduled	Unscheduled	Scheduled	Waiting Customer Action	Need INSTALLS inc Action	Completed	Cancelled	TOTAL		
<u>114</u>	<u>12</u>	<u>12</u>	2	<u>0</u>	1844	266	2250		

The hyperlinked number that appears below each color-coded status indicates the number of orders currently in that status. In the example above, there are 12 orders in the status of **Scheduled**.

 Click the hyperlinked number that appears below the Scheduled status. Note: This displays the Status screen.



DIGI	TAL ON-LINE INTERFACE S	YSTEM (DOLI) 193	HELP?
0	Logged In - INSTALLER	>Logout <	April 30, 2012 > 04:14 PM
_	Home N	ly Account Download / Print Orders New Workorders Create Custom Orders Job Number 💌	FIND ,
		Select from the criteria below to search the SCHEDULED status.	
	Filter By Client: All	Filter By Campaign: 💙 Filter By Comment: - ALL 12 - Scheduled 💙 Sort By: Nan	nes Alphabetically 👻 FIND 🔎
			<u>^</u>
		Please click Find button. Then Select each name on order list to update.	
			×

- 3. Leave all filters at their default settings.
- 4. Click the **Find** button.

Note: This displays a list of Scheduled orders on the right side of the Status screen.

5. Click the View Call Sheet button above the search results.

Figure 25

Ø	Logged In - INSTALLER	> Logout <	April 30, 2012 > 04:14 PM
	Home My Account Dr	winload / Print Orders <u>New Workorders</u> <u>Create Custom Orders</u> Job Number V Select from the criteria below to search the <u>SCHEDULED</u> status. V Filter By Campaign: V Filter By Comment; <u>EALL 12 - Scheduled</u> V	Sort By: Names Alphabetically V FIND O
	Please click	Find button. Then Select each name on order list to update.	Search Results: 1 - 12 <12> ALL-Comments of <12> Scheduled VIEW CALL SHEET >>
			> Listen Ball hhgregg 5127 - Basic TV Setup Job # > 04/14/2012 > ASSURANT SOLUTIONS- TARGET 522 - Basic TV Wall Mount

Note: This opens the call sheet for all orders currently scheduled to your company in DOLI in a new window. The technician currently scheduled to complete the job is listed at the bottom of each job record.

Figure 26

	CALL SHE April 30, 2012 > 04 (12 orders in this ca	:05 PM	
PRINT C	ALL SHEET EX	PORT CALL SHEET	
ALL ALL ADDRESS OF TAXABLE	< Home No.	DV Job #>	
	< Work No.	DV Job # > Tracking # >	
Install Date: 05/12/2012	< Work No.	Tracking # >	

6. Review the Call Sheet to determine if any orders are currently scheduled to the technician you wish to make inactive.



Step II: Reassign jobs on inactive technician's schedule to a different technician IMPORTANT NOTES BEFORE PROCEEDING:

- If there are jobs currently scheduled to the technician you are changing to inactive, you must reschedule the jobs to a new technician for the **same dates and arrival windows**.
- If you do not have a technician available for the scheduled arrival window, **do NOT move the appointment to** another date/time; you **MUST** call Installs at 1-888-490-4321 to reschedule the appointment so we can reset the appointment with the customer.
- If you see the **Re-book** link on the order on the Dispatch Board, then the order has been dispatched. Proceed to the "Perform the following steps to reassign a job that has <u>already been dispatched</u>" section of this procedure.
 OR
- If you do not see the **Re-book** link on the order on the Dispatch Board, then the order has not been dispatched. Skip ahead to the "Perform the following steps to reassign a job that has <u>not yet been dispatched</u>" section of this procedure.

Perform the following steps to reassign a job that has already been dispatched.

7. On the *Status* screen, click the **Home** link.

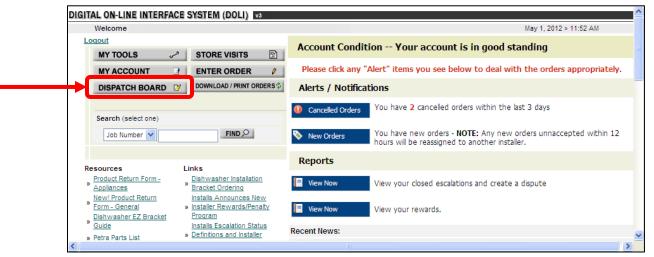
Figure	27
--------	----

	NTERFACE SYSTEM (DOLI) V3			HELP?
Logged In - INST	ALLER	> <u>Loqout</u> <		April 30, 2012 > 04:14 PM
	Home Ay Account Download / Pri	int Orders New Workorders Create Custom Orders Job Number 💙	F	IND ,
		Select from the criteria below to search the SCHEDULED status.		
Filter By Clie	nt: All	Filter By Campaign: Filter By Comment: - ALL 12 - Scheduled Sort	By: Names A	phabetically 💉 FIND 🔎
				Council Description
				Search Results: 1 - 12
				<12> ALL-Comments
	Please click Find button.	Then Select each name on order list to update.		of <12> Scheduled
			_	
				VIEW CALL SHEET 🗇 🕨
_			x	ELIZABETH BOHD
2				hhgregg
				5127 - Basic TV Setup
				Job # > 24.17 .204
				04/14/2012
			x	ROBE LOPEZ
				ASSURANT SOLUTIONS- TARGET
				5232 - Basic TV Wall Mount

Note: This returns you to the DOLI homepage.

8. On the DOLI homepage, click the **Dispatch Board** button.

Figure 28





Note: This opens the dispatch board in a new window. If the dispatch board does not open, check your pop-up blocker settings.

Sele	cted:	HARRISE	BURG	Wedr	esday, 10/20/2	010 (5 Orders di	splayed)					
Date	e Controls:	<< Previo	us Day	Selec	t Next Day >>	>						
rint	t orders:	Print all (rint all dispatched INSTALLS inc. orders. Or custom orders.									
Jum	o menus:	Go to a	Go to a Region 👻 Filter For Store 💌									
		Find a t	Find a last	name 🔽 F	ind a Job I	Numb	er 🗸					
Jp	JONES. BEN											
	8:00-11:59 AM	1				12:00-5:00 PM	Л				5:00-9:00 PM	
		Last Name	Dur/ A Job	dd Status	Re-book		Last Name	Dur/ A Job	dd Statu	is Re-book		
	Premium On Wall 33in to 50in	GREY	2.50 hrs /N		uled-By INSTALLS	Premium On Wall 33in to 50in Add-on	GOLDMAN	3.25 hrs /Y		duled-		
	City, State	Zip	ETA	Camp	aign Store	City, State	Zip	ETA	Cam	paign St	ore	
	HARRISBURG, PA	17122	08:00 AM	TV Sa	es 201	HARRISBURG, PA	17122	12:00 PM	TV S	ales :	201	
	SP ID	ID	CLIEN ID	T Date-	Start/End Time	SP ID	ID	CLIEN ID	T Date	- Start/End Time	2	
	1075-015-11	99555-	104159	2 10/20/2 08:00A	2010 M/11:59AM	10070-100-01	9968-192	104144	10/20/2010 12:00PM/04:59PM			
		Last Name		Dur/ Add Job	Status Re- book		Last Name		Dur/ Ad Job	d Status Re- book		
	Premium On Wall 33in to 50in	PEWTERSC	нмірт	2.50 hrs /No	Unscheduled- Accepted - To Be	Premium On Wall 33in to 50in	PEWTERSCH	IMIDT	2.50 hrs /No	Scheduled-		
					Scheduled	City, State	Zip		ETA	Campaign St	ore	
	City, State	Zip		ETA	Campaign Store	HARRISBURG, PA	17122		12:00 PM	TV Sales	201	
	HARRISBURG, PA	17122		08:00 AM	TV 201 Sales	SP ID	ID			Date- Start/En	d	
	SP ID	ID		CLIENT ID	Date- Start/End Time	10070-000-01	3953-91		1041423	10/20/2010	PM	
	10070-10a-21	39453-10	5.5	1041421	10/20/2010 08:00AM/11:59AM					12.00-1004.00		

Figure 29

- 9. Locate the first job you wish to reassign.
 - Note: If you do not have a technician available for the scheduled arrival window, do NOT move the appointment to another date/time; you MUST call Installs at 1-888-490-4321 to reschedule the appointment so we can reset the appointment with the customer.
- 10. If the job has already been dispatched, you will see a **Re-book** link on the order:

Figure 30

Sele	acted:	HARRIS	BURG	Wednesday, 10/20/2	2010 (5 Orders dis	splayed)				
Dat	ate Controls: <pre></pre> <pre></pre> <pre></pre> <pre>Select Next Day >></pre>				>					
Prin	t orders:	ed INSTALLS inc. ord	ers. Or custom	orders.						
Jum	1p menus:		io to a Region 👻 Filter For Store 👽							
Up	JONES. BEN									
	8:00-11:59 AM				12:00-5:00 PM					5:00-9:00 PM
		Last Name	Dur/ Ide	Status Re-book		Last Name	Dur/ Add Job	Status Re-boo	ok	
	Premium On Wall 33in to 50in	GREY	2.50 hrs /No	Scheduled-By INSTALLS inc.	Premium On Wall 33in to 50in Add-on	GOLDMAN	3.25 hrs /Yes	Scheduled-		
	City, State	Zip	ETA	Campaign Store	City, State	Zip	ETA	Campaign	Store	
	HARRISBURG, PA	17122	08:00 AM	TV Sales 201	HARRISBURG, PA	17122	12:00 PM	TV Sales	201	
	SP ID	ID	CLIENT ID	Date- Start/End Time	SP ID	ID	CLIENT ID	Date- Start/End 1	lime	
	10070-0100-21	9976	1041592	10/20/2010 08:00AM/11:59AM	10070-102-21	9946-192	1041449	10/20/2010 12:00PM/04:59PM		

11. Click the **Re-book** link on the order on the Dispatch Board. **Note:** This displays a confirmation dialog box.



Message from webpage 🛛 🔀								
?	Are you sure you want to Re-book the following order? Last name: Job number:							
	OK Cancel							

12. Click the **OK** button on the confirmation dialog box.

Note: This hides the order from the Dispatch Board. The jobs assigned to the rest of your technicians for this day are displayed. Find a different technician with the same date and arrival window timeslot available.

- 13. Click the **Book** link in the **SAME** arrival window timeslot on the **SAME** date under the new technician.
 - **Note:** If you do not have a technician available for the scheduled arrival window, do **NOT** move the appointment to another date/time; you **MUST** call Installs at 1-888-490-4321 to reschedule the appointment so we can reset the appointment with the customer.

Selected:	HARRISBURG Wednesday, 10/20/2010 (0 Orders displayed)									
Date Controls:	<pre><< Previous Day Select Next Day >></pre>									
Print orders:	Print all dispatched INSTALLS	Print all dispatched INSTALLS inc. orders. Or custom orders.								
Jump menus:	Go to a Region Filter For Store Find a tech Find a last name Find a Job Number									
Up SMITH, JOE	Book	12:00-5:00 PM Book		5:00-9:00 PM						

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



Selected	Ŀ	HARRISE	ARRISBURG Wednesday, 10/20/2010 (5 Orders displayed)						
Date Co	ntrols:	<< Previo	us Day	Select Next	t Day >>				
Print ord	ers:	Print all (dispatch	ed INSTALLS	inc. orde	ers. Or custom orders.			
Jump me	enus:		Go to a Region 👻 Filter For Store 💌 Find a tech V Find a last name V Find a Job Number V						
Јр ѕмг	TH. JOE								
8	:00-11:59 AM					12:00-5:00 PM	5:00-9:00 PM		
		Last Name	Dur/ Add Job	Status Re-bo	ok				
	mium On Wall 1 to 50in	GREY	2.50 hrs /No	Scheduled-By IN inc.	ISTALLS				
City	y, State	Zip	ETA	Campaign	Store				
HAF	RRISBURG, PA	17122	08:00 AM	TV Sales	201				
SP	ID	ID	CLIENT ID	Date- Start/End	Time				
-	化成体的	99503- 6115	1041592	10/20/2010 08:00AM/11:59A/	м				

14. Repeat these steps for all dispatched jobs currently assigned to the technician you are making inactive.



Perform the following steps to reassign a job that has not yet been dispatched:

- **Note:** If you do not have a technician available for the scheduled arrival window, do **NOT** move the appointment to another date/time; you **MUST** call Installs at 1-888-490-4321 to reschedule the appointment so we can reset the appointment with the customer.
- 15. Search for the individual order in DOLI.
- 16. Click the APPOINTMENT INFO button on the Order Tool Bar.

Figure 34

Logged In - INSTALLER	L		> <u>Logout</u> <	
	Home My Account	Download / Print Orders New Workorders Crea	te Custom Orders Job Number 🔽	FIND 🔎
		Select from the criteria below to sea	rch the SCHEDULED status.	
Filter By Client: All	· · · · · · · · · · · · · · · · · · ·	Filter By Campaign: 🔽 Filter	By Comment: - ALL 84 - Scheduled 💙	Sort By:
ABANETI IALIMPA	< Home No.	INSTALLS Job # >	Order ID >	1011073100
- and the statement of the		Email Address > NA		
and the second second		Created Date > 10/29/2010	Completion Date >	n/a
MAP	hhgregg Troubleshoot	In the Destant	n Pre-Scheduled Date>	n/a
MAP	Troubleshoot	Install Date> 11/11/2012 - 12pm - 5pm	n Pre-scheduled bates	1/a
MAZ	Troubleshoot			Dispatch Board
Control of the second				
	Current	den and the automatic designed		
Carticity (Current	Status: Scheduled > (scheduled no comment)	Appointment Info	
Concerne de	Current	Status: Scheduled > (scheduled no comment) ange Status: valiable here. In order to schedule this job, please use valiable here. In order to schedule this job, please use	Appointment Info.	
Contraction (1)	Current	Status: Scheduled > (scheduled no comment) ange Status: t available here. In order to schedule this job, please use	Appointment Info.	
Contractor de	Current	Status: Scheduled > (scheduled no comment) ange Status: valiable here. In order to schedule this job, please use valiable here. In order to schedule this job, please use	Appointment Info.	

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

Figure 35

Technician		Standard Install Time: 2.5hrs			Booked Count: 1	
Mandatory Exclude			Time Extension: +0.0	✓ hrs	Doli Order Id:	
Choose A Technician 🔽				1113	Doil Order Id.	
Select Search Parameters		Available Da	ites & Times:	Viewing 1 - 6 of 24	NEXT @	
Time of Day	Days	Wed	10/20/2010	08:00am-12:00pm	Book/Re-book	
	✓ Mon.	Wed	10/20/2010	12:00pm - 5:00pm	Book/Re-book	
AM - PM 💙		Thu	10/21/2010	12:00pm-5:00pm	Book/Re-book	
	Tue.	Fri	10/22/2010	08:00am-12:00pm	Book/Re-book	
Start Date	Ved.	Fri	10/22/2010	12:00pm-5:00pm	Book/Re-book	
10 💙 20 💙 2010 💙	I Thu.	Mon	10/25/2010	08:00am-12:00pm	Book/Re-book	
End Date	✓ Fri.	UPDATE SEAF	CH CRITERIA NOW 🔎 FORCE DATE/TI	ME 🤌		
	Sat.					
	Sun.					

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

Figure 36

Control Andrew C			Standard Install Time: 2.	5hrs	Booked Count: 1	
Choose A Technician V		Time Extension: +	Doli Order Id:			
Select Search Parameters		Available Da	ites & Times:	Viewing 1 - 6 of 24	NEXT	
Time of Day	Days	Wed	10/20/2010	08:00am-12:00pm	Book/Re-book	
-	Mon.	Wed	10/20/2010	12:00pm - 5:00pm	Book/Re-book	
AM - PM 💙		Thu	10/21/2010	12:00pm-5:00pm	Book/Re-book	
	Tue.	Fri	10/22/2010	08:00am-12:00pm	Book/Re-book	
Start Date	Ved.	Fri	10/22/2010	12:00pm – 5:00pm	Book/Re-book	
10 V 20 V 2010 V	🗹 Thụ.		10/05/0010	08:00am-12:00pm	Book/Re-book	
11 v 22 v 2010 v	U FIL	UPDATE SEAR	RCH CRITERIA NOW 🔎 ORCE DATI	e/TIME 🤌		
11 1 22 1 2010 1	Sat.					
	Sun.					

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

20. Click the Book/Rebook link next to the same date and time the job was originally scheduled.



Technician			Standard Install Time: 2.5	nrs	Booked Count: 1
Choose A Technician	Time Extension: +0.0 hrs			Doli Order Id:	
		Augilable Dr	ates & Times:		NEXT @
Select Search Parameters		Available Da	nes & nines:	Viewing 1 - 6 of 24	Book/Re-book
Time or Day	Days	Wed	10/20/2010	12:00pm - 5:00pm	
AM - PM 💙	Mon.	Thu	10/21/2010	12:00pm - 5:00pm	Book/Re-book
	Tue.	Fri	10/22/2010	08:00am - 12:00pm	Book/Re-book
Start Date	Ved.	Fri	10/22/2010	12:00pm-5:00pm	Book/Re-book
10 💙 20 🌱 2010 💙	☑ Thu.	Mon	10/25/2010	08:00am-12:00pm	Book/Re-book
End Date	🗹 Fri.	UPDATE SEAF	RCH CRITERIA NOW 9	IME 🥥	
	Sat.				
	Sun.				

Note: This displays the appointment confirmation screen.

Figure 38

Please confirm the following date and installation information.					
Installation Date:					
October 20, 2010 > 08:00am - 12:00pm					
Type of Installation:					
hhgregg - TV Sales Premium On Wall 33in to 50in Add-on	hhgregg - TV Sales Premium On Wall 33in to 50in Add-on				
Job Duration Time(s):	ACCEPT BOOKING CANCEL BOOKINGX				
2.5 hours					

- 21. Click the **ACCEPT BOOKING** button on the appointment confirmation screen.
 - **Note:** This reassigns the job to the new tech and displays the order history, indicating that the order has been scheduled to the new technician.

Figure 39

10/15/2010	09:41am	User Type: INSTALL	ER	Name:	100 11 11 10 10 10 10 10 10 10 10 10 10
	Order Booked	18010	1000		
	Tech Name	Joe	Smith		
	Installer	1887		120.00	
	Install Date	10/2	0/2010 AM		
	Start Time	8:00	am		
	End Time	12:0	0pm		
Status:	Scheduled		Comment	(scheduled no	comment)

22. Repeat these steps for all non-dispatched jobs currently assigned to the technician you are making inactive.



Step III: Change Technician's Active status to "No"

- 23. Log in to DOLI using the installer username and password provided to you by the Installs Field Relations team.
- 24. On the Main Navigation Bar on the DOLI homepage, click the **MY TOOLS** button.
- 25. On the My Information screen, click the TECHNICIANS button.

Figure 40

Home Logo	<u>ut</u>		November 5, 2010 > 02:49 PM
	My Information:		
	Installer ID:	Installer:	Phone:
0	MY INFO 🚭 REPORTS 🚭	ANG AND AND A CONTRACT AND A CONTRACT AND A	7197 - 3388 - 3868 1
	TECHNICIANS 🛷	Email:	Fax:
	DISPATCHERS 127 REGION Carl	WOVE HEALTH COMPANY	
DO	WNLOAD / PRINT DERS	URL (Web Address):	
Down	NLOAD SKU LIST 🕸		Submit Updated Info
	Change Password	New Password:	Confirm:
NA	Your password has to have at lea characters. They can be numbers or letters. (e nassword/23)		

Note: This displays the Create New Technician screen.

26. On the *Create New Technician* screen, click the **User Info** link next to the name of the technician you wish to make inactive.

Figure 41

I-LINE INTERFACE SY					December 12, 2011 > 11:52 AM
	CREATE NEW TEO	CHNICIAN			
MY INFO 😭	First Name	Last Name - (required)	SBCA #		
REPORTS 🚳					
TECHNICIANS 🥔	Phone	Cell	Pager		
DISPATCHERS 📝				Submit	
REGION 🛁	Address		Email		
DOWNLOAD / PRINT ORDERS					
DOWNLOAD SKU LIST 🕅		AL 💙			
	ACTIVE TECHNIC	IANS			
	First Name Last Nam	ne			
	And Personnel Address of the Person of the P	User Info Regions Shif	ts Edit		
	BEN JONES	User Info Regions Shif	ts Edit		

- 27. Click No under Active to make the technician inactive.
- 28. Click the modify button to save the changes.
- 29. Click the **Back** link to return to the *Create New Technician* screen.

DIGITAL ON-LINE INTERFACE SYS	STEM (DOLI) v3			December 12, 2011 > 10:42 AM
z	EDIT TECHNICIAN LOG	in		
MY INFO 🚱 REPORTS 🚱	Tech Name: JONES, BEN UserName	SP ID: 111-999 Password	Active	
REGION → DOWNLOAD / PRINT ORDERS ↓ DOWNLOAD SKU LIST &	bjones < Back		O Yes ⊙ No modify	



Note: The newly deactivated technician will appear in the *Inactive Technicians* list when you return to the *Create New Technician* screen. You **must** complete this step in order for the technician to stop receiving work from Installs.

Q 1	Home Logout					December 12, 2011 > 10:42 AM
Z		CREATE NEW TE	CHNICIAN			
	MY INFO 🚳	First Name	Last Name - (required	i) SBCA #		
0	REPORTS 🚳					
	TECHNICIANS 🛹	Phone	Cell	Pager		
	DISPATCHERS []				Submit	
►	REGION 🛁	Address		Email		
U	DOWNLOAD / PRINT ORDERS					
<u> </u>	DOWNLOAD SKU LIST 💱		AL 🖌			
\geq		ACTIVE TECHNI	CIANS			
		First Name Last N	ame <u>User Info</u> Region	s Shifts Edit		
		INACTIVE TECH	NICIANS			
		First Name Last Na	ame			
		BEN JONES	User Info Regions	Shifts Edit		



SHIFT EXCEPTIONS (ADDITIONAL DAYS OFF, SICK DAYS, HOLIDAYS)

A shift exception refers to a day off outside of the technician's normally scheduled days off. For example, if a technician generally works Tuesday through Saturday, with Sunday and Monday as his normal days off, and decides to take a vacation day on Thursday, January 12, then Thursday, January 12 is considered a shift exception.

When your technicians need to take days off in addition to their regularly scheduled days off (e.g., vacation days), you **must** update DOLI to ensure that jobs are not assigned to them while they are off. You should enter shift exceptions into DOLI with as much advance notice as possible.

If your company will have limited or no technician coverage due to a holiday observance, you **must** communicate your company/technician availability/unavailability to Installs at the correct territory email address (below) as early as possible to ensure that jobs are not assigned to your technicians during the day(s) off. This is especially critical during the months of November and December and for installers who are store primaries.

Territory Email Addresses

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
All Compliance paperwork; general field inquiries	fieldrelations@installs.com



See the "Entering a Shift Exception in DOLI" section of this document for more information on setting a technician's day off.

Entering a Shift Exception in DOLI

Step I: Check DOLI for jobs scheduled to technician on the day off date

1. On the DOLI homepage, click the **My Account** button.

Figure 44 DIGITAL ON-LINE INTERFACE SYSTEM (DOLI) V3 May 1, 2012 > 11:52 AM Welcome Logout Account Condition -- Your account is in good standing MY TOOLS STORE VISITS 2 MY ACCOUNT ENTER ORDER Please click any "Alert" items you see below to deal with the orders appropriately. 0 DOWNLOAD / PRINT ORDERS \$ DISPATCH BOARD 🛛 📝 Alerts / Notifications You have 2 cancelled orders within the last 3 days Cancelled Orders Search (select one) You have new orders - NOTE: Any new orders unnaccepted within 12 FIND 🔎 Job Number 🔽 📎 New Orders hours will be reassigned to another installer. Reports Resources Links » <u>Bracket Ordering</u> Product Return Form -📃 View Now View your closed escalations and create a dispute Appliances

Note: This displays the My Orders screen.



ged In - INSTALLI	ER			>	Logout <	Ар	ril 30, 2012	> 04:09 PN
	He	ome Downloa	ad / Print Orders <u>New W</u>	orkorders	Create Custom	Orders		
	All Clients		✓ Pho	e 🗸		FIND,	2	
			n				_	
Clients	_		You have 2250 instal	ation ord	ers in your acco Order Statuses	unt.		
Clients CLIENT: INSTA	LLS inc		You have 2250 instal	ation ord	-	unt.		
CLIENT: INSTA			You have 2250 instal		Order Statuses		Cancelled	TOTAL

The hyperlinked number that appears below each color-coded status indicates the number of orders currently in that status. In the example above, there are 12 orders in the status of **Scheduled**.

2. Click the hyperlinked number that appears below the **Scheduled** status.

Note: This displays the *Status* screen.

Figure 46

DIGI	AL ON-LINE INTE	FACE SYSTEM (DOLI) V3	HELP?
Ø	Logged In - INSTALL	R > <u>Logout</u> <	April 30, 2012 > 04:14 PM
_		Home My Account Download / Print Orders New Workorders Create Custom Orders Job Number 😽	FIND P
		Select from the criteria below to search the SCHEDULED status.	
	Filter By Client: A	Filter By Campaign: 🔽 Filter By Comment: - ALL 12 - Scheduled 👥 Sort By: Nar	nes Alphabetically 💉 FIND 🔎
			<u></u>
		Please click Find button. Then Select each name on order list to update.	

- 3. Leave all filters at their default settings.
- 4. Click the **Find** button.

Note: This displays a list of Scheduled orders on the right side of the Status screen.

5. Click the View Call Sheet button above the search results.

Figure 47

X	Logged In - INSTALLER	> Logout <		April 30, 2012 > 04:14 Pl
	Home M	y Account Download / Print Orders New Workorders Create Custom Orders Job Number 💌	FI	
		Select from the criteria below to search the SCHEDULED status.		
	Filter By Client: All	Filter By Campaign: Filter By Comment: - ALL 12 - Scheduled V Sort By:	Names Al	Iphabetically 💙 FIND 🔎
				Search Results:
				1 - 12 <12> ALL-Comments
		Please click Find button. Then Select each name on order list to update.		of <12> Scheduled
			_	
				VIEW CALL SHEET 🧇 🕨
2	1		39	ELLEAGETH BOND
				hhgregg
				5127 - Basic TV Setup
				Job # > # 37
				04/14/2012
			39	ROSE LOPEZ
				ASSURANT SOLUTIONS- TARGET
				5232 - Basic TV Wall Mount

Note: This opens the call sheet for all orders currently scheduled to your company in DOLI in a new window. The technician currently scheduled to complete the job is listed at the bottom of each job record.



	CALL SHE April 30, 2012 > 04 (12 orders in this ca	:05 PM
PRINT C	ALL SHEET EX	PORT CALL SHEET
ALLONGO PERMIT	< Home No.	DV Job #>
100112000-00001200	< Work No.	Tracking # >
1993 - 1995 - 1995 - 1995 1995 - 1995 - 1995 - 1995 - 1995 - 1995 - 1995 - 1995 - 1995 - 1995 - 1995 - 1995 - 1995 - 1995 - 1995 - 1995	< Work No. < Cell / Pager	Tracking # > Creation Date > 04/14/2012

6. Review the call sheet to determine if any orders are currently scheduled to the technician you wish to make inactive.

Step II: Reassign jobs on technician's schedule to a different technician IMPORTANT NOTES BEFORE PROCEEDING:

- If there are jobs currently scheduled to the technician on the date s/he is taking off, you **must** reschedule the jobs to a new technician for the **same dates and arrival windows**.
- If you do not have a technician available for the scheduled arrival window, do NOT move the appointment to another date/time; you MUST call Installs at 1-888-490-4321 to reschedule the appointment so we can reset the appointment with the customer.
- If you see the **Re-book** link on the order on the Dispatch Board, then the order has been dispatched. Proceed to the "Perform the following steps to reassign a job that has <u>already been dispatched</u>" section of this procedure.
 OR
- If you do not see the **Re-book** link on the order on the Dispatch Board, then the order has not been dispatched. Skip ahead to the "Perform the following steps to reassign a job that has <u>not yet been dispatched</u>" section of this procedure.

Perform the following steps to reassign a job that has <u>already been dispatched</u>.

7. On the Status screen, click the Home link.

Figure 49

DIGIT	TAL ON-LINE INTERFACE SY	STEM (DOLI) v3	HELP?
0	Logged in - INSTALLER	> Logout <	April 30, 2012 > 04:14 PM
	Home Ay	Account Download / Print Orders New Workorders Create Custom Orders Job Number 💌	FIND P
		Select from the criteria below to search the SCHEDULED status.	
	Filter By Client: All	Filter By Campaign: Filter By Comment: ALL 12 - Scheduled Sort By: Nam	es Alphabetically 💉 FIND 🔎
			Search Results:
	F	Please click Find button. Then Select each name on order list to update.	1 - 12 <12> ALL-Comments of <12> Scheduled
			VIEW CALL SHEET 🥸 🕨
15	1		» ELIZABETH BOHD
2			hhgregg
			5127 - Basic TV Setup
			Job # > 1117 200
			» 1011 1012
			ASSURANT SOLUTIONS- TARGET
			5232 - Basic TV Wall Mount

Note: This returns you to the DOLI homepage.

8. On the DOLI homepage, click the **Dispatch Board** button.



Welcome		May 1, 2012 > 11:52 AM
MY TOOLS	STORE VISITS	Account Condition Your account is in good standing
MY ACCOUNT	ENTER ORDER 🖉	Please click any "Alert" items you see below to deal with the orders appropriately.
DISPATCH BOARD	DOWNLOAD / PRINT ORDERS 🌣	Alerts / Notifications
Search (select one)		Cancelled Orders You have 2 cancelled orders within the last 3 days
Job Number 💌	FIND 🔎	New Orders You have new orders - NOTE: Any new orders unnaccepted within 12 hours will be reassigned to another installer.
Resources	Links	Reports
» <u>Product Return Form -</u> » <u>Appliances</u>	» <u>Bracket Ordering</u>	View Now View your closed escalations and create a dispute

Note: This opens the dispatch board in a new window. If the dispatch board does not open, check you pop-up blocker settings.

Sele	cted:	HARRISE	BURG	Wedr	iesday, 10/20/2	010 (5 Orders di	isplayed)				
Date	e Controls:	<< Previo	us Day	Selec	t Next Day >>	>					
Prin	t orders:	Print all (dispato	hed INS	TALLS inc. ord	ers. Or custon	n orders.				
Jum	Jump menus: Go to a Region 🗸 Filter For Stor				Filter For Store						
		Find a t	ech	~	Find a last	name 🖌 F	Find a Job I	Numbe	er 🗡		
Up	JONES. BEN										
	8:00-11:59 AM	I				12:00-5:00 PI	A				5:00-9:00 PM
		Last Name	Dur/ Ac Job	ld Status	Re-book		Last Name	Dur/ Ac Job	ld Statu	s Re-book	
	Premium On Wall 33in to 50in	GREY	2.50 hrs /N		uled-By INSTALLS	Premium On Wall 33in to 50in Add-on	GOLDMAN	3.25 hrs /Ye	s Sched	Juled-	
	City, State	Zip	ETA	Camp	aign Store	City, State	Zip	ETA	Camp	oaign Store	
	HARRISBURG, PA	17122	08:00 AM	TV Sa	es 201	HARRISBURG, PA	17122	12:00 PM	TV Sa	ales 201	
	SP ID	ID	CLIENT ID	Date-	Start/End Time	SP ID	ID	CLIENT ID	Date-	Start/End Time	
	1075-018-01	99755- 6175	1041592	2 10/20/2 08:00A	2010 M/11:59AM	100 CE 100 CF	9968-492	1041449		/2010 PM/04:59PM	
		Last Name		Dur/ Add Job	Status Re- book		Last Name		Dur/ Add Iob	Status Re- book	
	Premium On Wall	PEWTERSC	нмірт	2.50	Unscheduled- Accepted - To Be	Premium On Wall 33in to 50in	PEWTERSCH	IMIDT	2.50 hrs /No	Scheduled-	
	33in to 50in			hrs /No	Scheduled	City, State	Zip		TA	Campaign Store	
	City, State	Zip		ETA 08:00	Campaign Store	HARRISBURG, PA	17122		2:00 M	TV 201 Sales	
	HARRISBURG, PA	17122		AM	Sales 201	SP ID	ID			Date- Start/End	
	SP ID	ID		CLIENT ID	Date- Start/End Time	1000 (1000 - 201	9963-996		1041423 10/20/2010		
	10070a (1016-21)	9975-9		1041421	10/20/2010 08:00AM/11:59AM		300000	- 1		12:00PM/04:59PM	

Figure 51

9. Locate the first job you wish to reassign.

Note: If you do not have a technician available for the scheduled arrival window, do NOT move the appointment to another date/time; you MUST call Installs at 1-888-490-4321 to reschedule the appointment so we can reset the appointment with the customer.

If the job has already been dispatched, you will see a **Re-book** link on the order:



Sele	ected:	HARRISE	BURG	Wednesday, 1	0/20/2	010 (5 Orders dis	played)					
Dat	e Controls:	<< Previo	us Day	Select Next D	ay >>	>						
Print orders: Print all dispatched INSTALLS inc. order						ers. Or custom orders.						
Jun	np menus:		o to a Region 👻 Filter For Store 🛩									
Up	JONES. BEN											
	8:00-11:59 AM					12:00-5:00 PM		5:00-9:00 PM				
		Last Name	Dur/ Add	Status Re-bool	k		Last Name	Dur/ Add Job	Status Re-book			
	Premium On Wall 33in to 50in	GREY	2.50 hrs /No	Scheduled-By INS' inc.	TALLS	Premium On Wall 33in to 50in Add-on	GOLDMAN	3.25 hrs /Yes	Scheduled-			
	City, State	Zip	ETA	Campaign	Store	City, State	Zip	ETA	Campaign Sto	ore		
	HARRISBURG, PA	17122	08:00 AM	TV Sales	201	HARRISBURG, PA	17122	12:00 PM	TV Sales 2	201		
	SP ID	ID	CLIENT ID	Date- Start/End Ti	ime	SP ID	ID	CLIENT ID	Date- Start/End Time			
	1075-035-21	39953-	1041592	10/20/2010 08:00AM/11:59AM		1000	99958-192	1041449	10/20/2010 12:00PM/04:59PM			

10. Click the **Re-book** link on the order on the Dispatch Board.

Note: This displays a confirmation dialog box.

Figure 53

Message	e from webpage 🛛 🔀
2	Are you sure you want to Re-book the following order? Last name: Job number:
	OK Cancel

- 11. Click the **OK** button on the confirmation dialog box.
 - **Note:** This hides the order from the Dispatch Board. The jobs assigned to the rest of your technicians for this day are displayed. Find a different technician with the same date and arrival window timeslot available.
- 12. Click the **Book** link in the **SAME** arrival window timeslot on the **SAME** date under the new technician.
 - **Note:** If you do not have a technician available for the scheduled arrival window, do **NOT** move the appointment to another date/time; you **MUST** call Installs at 1-888-490-4321 to reschedule the appointment so we can reset the appointment with the customer.
 - **Note:** If you do not have a technician available for the scheduled arrival window, do **NOT** move the appointment to another date/time; you **MUST** call Installs at 1-888-490-4321 to reschedule the appointment so we can reset the appointment with the customer.

Figure 54

Selected:	HARRISBURG Wednesday, 1	HARRISBURG Wednesday, 10/20/2010 (0 Orders displayed)									
Date Controls:	<< Previous Day Select Next	< Previous Day Select Next Day >>									
Print orders:	Print all dispatched INSTALLS i	nc.orders. Or o	custom orders.								
Jump menus:		r Store 🔽 Iast name 🔽	Find a Job Number 👻								
Up змітн, јое		40:00 5:00 PM		5-00 0-00 PM							
	Book	12:00-5:00 PM	Book	5:00-9:00 PM							

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



Date Controls:		HARRISBURG Wednesday, 10/20/2010 (5 Orders displayed)								
		<< Previous Day Select Next Day >>								
		Print all	dispatch	ed INSTALLS	inc. ord	ers. Or custom orders.				
		Go to a Find a t	Region ech		or Store d a last					
ρ	SMITH, JOE									
	8:00-11:59 AM					12:00-5:00 PM	5:00-9:00 PM			
		Last Name	Dur/ Add Job	Status Re-bo	ok					
	Premium On Wall 33in to 50in	GREY		Scheduled-By IN inc.	ISTALLS					
	City, State	Zip	ETA	Campaign	Store					
	HARRISBURG, PA	17122	08:00 AM	TV Sales	201					
	SP ID	ID	CLIENT ID	Date- Start/End	Time					
	1075-015-11	99503- 6175	1041592	10/20/2010 08:00AM/11:59A						

13. Repeat these steps for all dispatched jobs currently assigned to the technician who needs a shift exception.

Perform the following steps to reassign a job that has not yet been dispatched:

- **Note:** If you do not have a technician available for the scheduled arrival window, do **NOT** move the appointment to another date/time; you **MUST** call Installs at 1-888-490-4321 to reschedule the appointment so we can reset the appointment with the customer.
- 14. Search for the individual order in DOLI.
- 15. Click the **APPOINTMENT INFO** button on the Order Tool Bar.

Figure 56

_							
DIGIT	AL ON-LINE INTERFACE	SYSTEM (DOLI) V3					
Q	Logged In - INSTALLER				> Logo	<u>ut</u> <	
		Home My Account I	Download / Print Orders				FIND ,
					search the SCHEDULE		
	Filter By Client: All	*	Filter By Camp	baign: 🚩 🛛 Fil	Iter By Comment: - AL	L 84 - Scheduled 🗸 🗸	Sort By: Names A
-	ALTERN TO A	< Home No.	INSTALLS Job # >			Order ID >	
100	I DESCRIPTION OF		Email Address >	NA			
			Created Date >			Completion Date >	n/a
MAP	NO	hhgregg Troubleshoot				Des Ashe data di Deter	
MAC		Troubleshoot	Install Date>	11/11/2012 - 12pm -	5pm	Pre-Scheduled Date>	n/a
	Consta Contana 🕀 Data	A Manuface = Minternal & Dave Date de	terres status - status -	Catterile 🕜 Conjerne	at Drawing	Appointment Info	Dispatch Board
		Current S	Status: Scheduled > (sch	heduled no commer	nt)		
		Char	nge Status:				
		The Scheduled status is not	-	hedule this inh inlease	use Annointment Info		
		The cancelled status is not av					
		Add / Edit Notes : (Notes e	ntered here will not appea	ar on the printed wor	korder.)		
					~		
					~		
		Account #:			SUBMIT 🖌		

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

Technician			Standard Install Time: 2.5	nrs	Booked Count: 1
Mandatory Exclude Choose A Technician			Time Extension: +0.0	∨ hrs	Doli Order Id:
Select Search Parameters		Available Da	ites & Times:	Viewing 1 - 6 of 24	NEXT @
Time of Day	Days	Wed	10/20/2010	08:00am-12:00pm	Book/Re-book
	Mon.	Wed	10/20/2010	12:00pm – 5:00pm	Book/Re-book
AM - PM 💙		Thu	10/21/2010	12:00pm – 5:00pm	Book/Re-book
	Tue.	Fri	10/22/2010	08:00am-12:00pm	Book/Re-book
Start Date	Ved.	Fri	10/22/2010	12:00pm-5:00pm	Book/Re-book
10 🗸 20 🖍 2010 🖍	🔽 Thu.	Mon	10/25/2010	08:00am-12:00pm	Book/Re-book
End Date 11 v 22 v 2010 v	🗹 Fri.	UPDATE SEAF	RCH CRITERIA NOW P FORCE DATE/T	IME 🧔	
	✓ Sat. ✓ Sun.				



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

		Standard Install Time:	2.5h	rs	Booked Count: 1
		Time Extension:	+0.0	✓ hrs	Doli Order Id:
	Available Date	s & Times:		Viewing 1 - 6 of 24	
Dave	Wed	10/20/2010		08:00am-12:00pm	Book/Re-book
	Wed	10/20/2010		12:00pm-5:00pm	Book/Re-book
	Thu	10/21/2010		12:00pm-5:00pm	Book/Re-book
	Fri	10/22/2010		08:00am-12:00pm	Book/Re-book
Wed.	Fri	10/22/2010		12:00pm – 5:00pm	Book/Re-book
🔽 Thu.	Mon	10/25/2010		08:00am-12:00pm	Book/Re-book
	UPDATE SEARCH	CRITERIA NOW 🔎 FORCE I	DATE/TIN	AE 🧔	
Sun.					
	 ✓ Thu. ✓ Fn. ✓ Sat. 	Days Wed Wed Tue. Fri Wed. Fri Wed. Fri Thu Fri Sat.	Days Wed 10/20/2010 ✓ Mon. 10/20/2010 ✓ Mon. Thu 10/21/2010 ✓ Mor. Fri 10/22/2010 ✓ Tue. Fri 10/22/2010 ✓ Tue. Fri 10/22/2010 ✓ Thu. 10/22/2010 10/22/2010 ✓ Thu. Update Search CRITERIA NOW > Force ✓ Sat. Force Force	Days Wed 10/20/2010 ✓ Mon. Wed 10/20/2010 ✓ Mon. Thu 10/21/2010 ✓ Mor. Fri 10/22/2010 ✓ Med. 10/22/2010 UR ✓ Tue. Fri 10/22/2010 ✓ Thu. UPDATE SEARCH CRITERIA NOW > FORCE DATE/TIM	Days Viewing 1 - 6 of 24 Wed 10/20/2010 08:00am - 12:00pm Wed 10/20/2010 12:00pm - 5:00pm Wed 10/22/2010 12:00pm - 5:00pm Wed 10/22/2010 12:00pm - 5:00pm Wed 10/22/2010 08:00am - 12:00pm Wed 10/22/2010 08:00am - 12:00pm Wed 10/25/2010 08:00am - 12:00pm Wed 10/25/2010 08:00am - 12:00pm Wed 10/25/2010 08:00am - 12:00pm Word 10/25/2010 08:00am - 12:00pm Sat. ************************************

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

- 19. Click the Book/Rebook link next to the same date and time originally scheduled.
 - Note: This displays the appointment confirmation screen.

Figure 59

Please confirm the following date and installation information.					
Installation Date:					
October 20, 2010 > 08:00am - 12:00pm					
Type of Installation:					
hhgregg - TV Sales Premium On Wall 33in to 50in Add-on					
Job Duration Time(s):	ACCEPT BOOKING CANCEL BOOKINGX				
2.5 hours	ALL POLINIC SHIEL DOUBLER				

- 20. 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 60

10/15/2010 0	9:41am	User Type: INS	TALLER		Name: Initial Internation with
	Order Booked		1011200010		
	Tech Name		Joe Smith		
	Installer		100710-000		
	Install Date		10/20/2010	AM	
	Start Time		8:00am		
	End Time		12:00pm		
Status:	Scheduled			Comment:	(scheduled no comment)

21. Repeat these steps for all non-dispatched jobs currently assigned to the technician who needs a shift exception.



Step III: Schedule technician's day off (shift exception)

- 22. Log in to DOLI using the installer username and password provided to you by the Installs Field Relations team.
- 23. On the Main Navigation Bar on the DOLI homepage, click the **MY TOOLS** button.
- 24. On the *My Information* screen, click the **TECHNICIANS** button.

Figure 61

		YSTEM (DOLI) v3		
B Home Loc	lout			November 5, 2010 > 02:49 PI
		My Information:		
		Installer ID:	Installer:	Phone:
0	MY INFO 🐨	NUMBER OF STREET	ALL AREAS STRICTLASSICAL	7197 . 1358 3858 H
\longrightarrow	TECHNICIANS 🥔		Email:	Fax:
Τ× .	REGION	•	AND A CONTRACT OF THE PARTY OF	
	OWNLOAD / PRINT		URL (Web Address):	
DC	WNLOAD SKU LIST 🕀			
				Submit Updated Info
		Change Password	New Password:	Confirm:
		Your password has to have at least 8 characters.		
2		They can be numbers or letters. (eg.		

Note: This displays the *Create New Technician* screen.

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

Figure 62

	I-LINE INTERFACE SY	STEM (DOLI) V3				December 12, 2011 > 11:52 AM
		CREATE NEW TECH	NICIAN			5000mba 12, 2011 2 11.02 Am
0	MY INFO 🖘 REPORTS 🚱	First Name	Last Name - (required)	SBCA #		
	TECHNICIANS 🛹	Phone	Cell	Pager		
×	REGION	Address		Email	Submit	
U	ORDERS		AL 🗸			
		ACTIVE TECHNICIA		I		
<		First Name Inst Name				
Z		BEN JONES	User Info Regions Shif			

- 26. Enter the date(s) and shift(s) the technician will be off under Schedule Future Unavailability.
 - a. Select the Date, Shift Period, and Reason from the drop-down lists provided.
 - b. Click the Submit button to save the Future Unavailability.

Note: If the technician will be off for more than one day/shift, repeat the two previous steps for each date/shift the technician will be off.

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



DIGITAL ON-LINE INTERFACE SY	YSTEM (DOLI)	v3							
Bome Logout								Novemb	er 8, 2010 > 11:3
z	117-003 a	1001000							
MY INFO 🚳 REPORTS 🚳	EDIT TECH	NICIAN	N SHIF	rs					
TECHNICIANS 🛹	Shift	Mon	Tue	Wed	Thur	Fri	Sat	Sun	
DISPATCHERS []	8 AM - 12 PM								
DOWNLOAD / PRINT	12 PM - 5 PM								
ORDERS 💠	5 PM - 9 PM								
DOWNLOAD SKU LIST	Modify								
	SCHEDULE Date 1 v 2010 v	Shift I	Period	NOT W	Reaso	n	▼ S	ubmit	
	LIST OF FU Date Time F LIST OF PA	teason S	chedule	d On Sch	ieduled B	y			

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



SUMMARY

- Installs performs background checks on every technician an installer wants use for Installs work.
- Do NOT set up DOLI accounts for technicians who have failed, or have not had, an Installs background check.
- Installs will not be able to assign work to your technicians until you enter them into the DOLI system; set them up as soon as they pass the Installs background.
- Every technician working on Installs jobs needs a DOLI username and password.
- Your technicians will not see the same DOLI screens you see.
- When there is any change in the information you entered into DOLI about your technicians, you **MUST** update the technician's profile in DOLI to ensure that jobs and communications are properly routed to him/her.
- 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 Starting ZIP Code, Ending ZIP Code, Efficiency, and Maximum Travel Time information on each technician's DOLI profile.
- 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.
- When technicians leave your company, or when you decide that they will no longer work on Installs jobs, you must update their status in DOLI to reflect that they are no longer active Installs technicians. Until you mark the technician as inactive, DOLI will continue to assign jobs to the technician.
- Before deactivating a technician or setting up a shift exception, you must check DOLI for any jobs scheduled to the technician in the future. If there are, you must reassign the jobs to a new technician for the **SAME dates and arrival windows**.
- If you do not have a technician available for the scheduled arrival window, do NOT move the appointment to another date/time; you MUST call Installs at 1-888-490-4321 to reschedule the appointment so we can reset the appointment with the customer.



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.	Fitness Delivery and Set-up
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
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)



Job Skill	Definition	Job Types Skill Applies to
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
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)
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



Job Skill	Definition	Job Types Skill Applies to
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

