



# **Sam's Club Mattress Delivery**

## ***Service Provider Guide***

**Revised: 8 May 2014**

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

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# VEHICLE REQUIREMENTS FOR SAM'S CLUB MATTRESS DELIVERY SERVICES

## Requirements

Vehicles used to pick up and deliver Sam's Club mattresses must meet the following standards:

- Must be a box truck, cargo van, or fully enclosed trailer
- Clean cargo hold large enough to safely transport twin, full, queen, king, and California king size mattresses and box springs (up to 76 inches by 84 inches), as well as metal and adjustable bedframes
- Service provider must maintain insurance coverage on all vehicles used on Installs jobs
- Vehicles with existing branding can be used, but the branding should not show affiliations to any of Installs' clients' competitors
- Vehicle must be clean and damage-free

## Not Acceptable

The following cannot be used for pick-up and delivery:

- Pick-up trucks
- Cars
- Open trailers
- Equipment cannot be exposed or transported in an open vehicle covered with a tarp; the equipment must fit safely, securely, and completely inside the vehicle
- Equipment must not hang off the back or out of the windows of the vehicle
- Equipment cannot be transported on the top of a vehicle

## Additional Equipment

The following additional equipment is required for Sam's Club mattress delivery services:

- Rubber Gloves for removal of old equipment
- Mattress Bags for haul-away: [http://www.uline.com/BL\\_158/Mattress-Bags?pricode=WL92&utm\\_source=Bing&utm\\_medium=cpc&utm\\_term=mattress%20bags&utm\\_campaign=Bags%2C%20Poly%20%2F%20Plastic&gclid=CIDyIN-smroCFclz4AodogwAAA&gclid=ds](http://www.uline.com/BL_158/Mattress-Bags?pricode=WL92&utm_source=Bing&utm_medium=cpc&utm_term=mattress%20bags&utm_campaign=Bags%2C%20Poly%20%2F%20Plastic&gclid=CIDyIN-smroCFclz4AodogwAAA&gclid=ds)

# SERVICE PROVIDER DRESS GUIDELINES FOR SAM'S CLUB MATTRESS DELIVERY SERVICES

## Requirements

All Installs Sam's Club Mattress Delivery Service Providers are required to follow Installs' standard minimum dress guidelines, as 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:

Hats with Installs logo or no logo are permitted

### SHIRTS:

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

### PANTS:

Clean and appropriately sized khakis, work pants, or jeans

### SHOES:

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

### COLD WEATHER:

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

Technicians 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 Sam's Club job; do not wear these items to Clubs or to customer/Member homes.

- "Hoodie" sweat shirts
- T-shirts
- 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



# JOB INFORMATION FOR SAM'S CLUB MATTRESS DELIVERY SERVICES

## Job Scheduling

**Effective May 8, 2014:**

Installs schedules a delivery appointment window for each customer/Member when they place their order for mattress delivery services. Jobs will only be assigned to you for shifts you have available in DOLI. The four-hour delivery appointment windows are:

- 8:00am-11:59am
- 12:00pm-4:59pm
- 5:00pm-8:59pm

The scheduled delivery appointment window appears in the **Promise Time** field in the "Installer Information" section on the *Installs Installation Workorder*. You must arrive at the customer's location within the scheduled four-hour delivery appointment window. **If you are running late for a job or will not be able to make it to a job, call Installs at 1-888-490-4321, option 1, then option 1 to report the delay BEFORE the end of the scheduled appointment window.** Be sure to call the customer 30 minutes before your arrival to confirm you ETA.

## Paperwork

The DOLI paperwork for Sam's Club mattress delivery services is the *Installs Installation Workorder*.

The Sam's Club Click 'n' Pull Associate will also give you the yellow copy of the *Member Information for Delivery Form* when you pick up the equipment.

All paperwork must be completed, signed, and/or initialed as indicated. The paperwork must then be submitted to Installs for job payment.

## Equipment Size

The **Merchandise Information** section on the *Installs Installation Workorder* displays the equipment size (twin, full, queen, king, California king). Also check the **Additional Instructions** and **Special Instructions** sections of the workorder for any important notes related to the order.

You should operate under the expectation that all Sam's Club standard mattress delivery and set-up orders include pick-up and delivery of a box spring, as well as the mattress. Some orders also include pick-up, delivery, and set-up of a bed frame.

Serta Adjustable orders include pick-up, delivery, and set-up of an adjustable base. Serta Adjustable orders may not include delivery of a mattress.

## SKUs and Scopes of Work

### ***Standard Mattresses***

For standard mattresses, there are two base SKUs and two add-on SKUs:

#### **Basic Service SKUs:**

**4300, Basic Mattress Delivery**

**4303, Basic Mattress Delivery Add-on**

#### **Notes:**

- Includes pick-up of equipment from assigned location and delivery to interior of customer home
- Does not include set-up of equipment

#### **Scope of Work:**

##### *Service Includes:*

1. Service includes pick-up of mattress from assigned location and delivery to interior of customer home.
2. Follow Installs pick-up and product inspection procedure. Any exceptions at time of pick-up must be reported to Installs before the technician leaves the pick-up location.
3. Use appropriate vehicle and crew size for the equipment.
4. Technician surveys and documents on work order any existing damages, blemishes and/or defects on surrounding property including, but not limited to, walls, flooring, cabinets, countertop, and ceilings.
5. Any necessary charges for additional labor or parts resulting from findings are reviewed and signed off by customer on work order prior to beginning set-up.
6. DO NOT:
  - Move existing equipment to other floors of residence.
  - Remove windows or sliding glass doors to bring mattress into home.
  - Hoist or lift mattress over balconies or banisters.

##### *Completion:*

1. Technician removes carton and packing materials from premises.
2. Technician ensures all work areas are neat, clean, and dry.
3. Technician has customer sign and date each work order after the delivery is completed.
4. Technician signs and dates each work order after the delivery is completed.
5. Close out order in DOLI and upload work orders within twelve (12) hours of appointment window start time.
6. If there is work requested outside of this scope of work, contact INSTALLS inc at 1-888-490-4321, option 1, then option 1.

## Premium Service SKUs:

**4301, Premium Mattress Delivery, Set-up, and Haul-Away**

**4302, Premium Mattress Delivery, Set-up, and Haul-Away Add-on**

### Notes:

- Includes pick-up of equipment from assigned location and delivery to customer home
- Includes set-up of bed frame, box spring, mattress in room designated by customer
- Includes haul-away of old mattress, box spring, bed frame, if requested
- Includes proper disposal of hauled-away equipment; document on *Installs Installation Workorder*
- Does NOT include attaching headboard or foot board to frame
- Does NOT include haul-away of headboard or footboard

### Scope of Work:

#### *Pre-Set-up activities:*

1. Service includes pick-up of mattress from assigned location and delivery to interior of customer home.
2. Follow Installs pick-up and product inspection procedure. Any exceptions at time of pick-up must be reported to Installs before the technician leaves the pick-up location.
3. Use appropriate vehicle and crew size for the equipment.
4. Technician unpacks, inspects, and prepares equipment for set-up onsite.
5. Technician surveys and documents on work order any existing damages, blemishes and/or defects on surrounding property including, but not limited to, walls, flooring, cabinets, countertop, and ceilings. Any necessary charges for additional labor or parts resulting from findings are reviewed and signed off by customer on work order prior to beginning set-up.
6. Prior to beginning the set-up, technician ensures area is adequately protected from inadvertent damage.

#### *Set-up:*

1. DO:
  - Set equipment in desired location as requested by customer.
  - Assemble and set up all units step by step ACCORDING TO MANUFACTURER ASSEMBLY GUIDES.
  - Use all hardware in the correct order for each step.
  - Level and stabilize the equipment after moving into final position in home.
  - Move old unit (mattress) on same floor within home.
  - Haul away old mattress (if needed) and drop it at a recycling center (do not return the mattress to Sam's Club for recycling).
2. DO NOT:
  - Move existing equipment to other floors of residence.
  - Remove windows or sliding glass doors to bring mattress into home.
  - Hoist or lift mattress over balconies or banisters.

#### *Completion:*

1. Technician removes carton and packing materials from premises.
2. Technician ensures all work areas are neat, clean, and dry.
3. Technician has customer sign and date each work order after the set-up is completed.
4. Technician signs and dates each work order after the set-up is completed.
5. Close out order in DOLI and upload work orders within twelve (12) hours of appointment window start time.
6. If there is work requested outside of this scope of work, contact INSTALLS inc at 1-888-490-4321, option 1, then option 1.



## Serta Motion Beds

Installs is also performing delivery and set-up of Serta MotionEssentials™ and MotionPerfect® adjustable beds.

### Serta Motion Service SKU:

4304, Premium Mattress Delivery and Setup (Serta Adjust)

#### Notes:

- Two-person crew required
- Includes pick-up of equipment from assigned location and delivery to customer home
- Serta adjustable bed deliveries may or may not include a mattress
- Includes set-up of Adjustable Base
- Test all functions before and after placing mattress on adjustable base
- Leave Owner's Manual with customer
- Does NOT include attaching headboard or foot board to frame
- Adjustable Base Set-up Process video (4:01):  
[http://www.youtube.com/watch?v=u9pt3XQYxcU&list=UU7s7kPM2OdVts76LbmJFGeA&feature=player\\_embedded](http://www.youtube.com/watch?v=u9pt3XQYxcU&list=UU7s7kPM2OdVts76LbmJFGeA&feature=player_embedded)

Serta MotionEssentials™		
Size	Base Weight in Lbs.	Carton Size in Inches
Twin Long	115	84.3 x 41.7 x 8.4
Full	151	78.7 x 57.5 x 8.4
Queen	191	84.3 x 63.4 x 8.4
King (2 Twin XL)*	2 X (115)	2 X (84.3 x 41.7 x 8.4)

Serta MotionPerfect®		
Size	Base Weight in Lbs.	Carton Size in Inches
Twin Long	147	84.3 x 41.7 x 8.4
Full	177	78.7 x 57.5 x 8.4
Queen	212	84.3 x 63.4 x 8.4
King (2 Twin XL)*	2 X (147)	2 X (84.3 x 41.7 x 8.4)

\* A King Size Adjustable Base contains two Twin Long Bases.

### Scope of Work:

#### Pre-Set-up activities:

1. Service includes pick-up of equipment from assigned location and delivery to interior of customer home.
2. Follow Installs pick-up and product inspection procedure. Any exceptions at time of pick-up must be reported to Installs before the technician leaves the pick-up location.
3. Use appropriate vehicle and crew size for the equipment.
4. Technician unpacks, inspects, and prepares equipment for set-up onsite.
5. Technician surveys and documents on work order any existing damages, blemishes and/or defects on surrounding property including, but not limited to, walls, flooring, cabinets, countertop, and ceilings. Any necessary charges for additional labor or parts resulting from findings are reviewed and signed off by customer on work order prior to beginning set-up.
6. Prior to beginning the set-up, technician ensures area is adequately protected from inadvertent damage.

#### Set-up:

1. DO:
  - Set equipment in desired location as requested by customer.
  - Assemble and set up all units step by step ACCORDING TO MANUFACTURER ASSEMBLY GUIDES.
  - Use all hardware in the correct order for each step.
  - Level and stabilize the equipment after moving into final position in home.

- Move old unit (mattress) on same floor within home.
- 2. DO NOT:
  - Move existing equipment to other floors of residence.
  - Remove windows or sliding glass doors to bring mattress into home.
  - Hoist or lift mattress over balconies or banisters.

*Completion:*

1. Technician removes carton and packing materials from premises.
2. Technician ensures all work areas are neat, clean, and dry.
3. Technician has customer sign and date each work order after the set-up is completed.
4. Technician signs and dates each work order after the set-up is completed.
5. Close out order in DOLI and upload work orders within twelve (12) hours of appointment window start time.
6. If there is work requested outside of this scope of work, contact INSTALLS inc at 1-888-490-4321, option 1, then option 1.

# SERVICE PROVIDER PROCESSES FOR SAM'S CLUB MATTRESS DELIVERY SERVICES

## Mattress Pick-up Process

**Note:** If it takes more than 30 minutes to complete the pick-up process at Sam's Club, please call Installs' Service Fulfillment team at 1-888-490-4321, option 1, then option 1 for assistance.

1. When you arrive at the Sam's Club location to pick up the product, go to the Member Service desk and ask for the Click 'n' Pull Associate.
2. Show the Click 'n' Pull Associate your photo identification, and have the Register Number and Transaction Number (in "Customer Information" section at the top of the *Installs Installation Workorder*) available.

INSTALLS inc Installation Workorder		(888) 490-4321	(888) 655-8621 < Fax
Customer Information		Job Number: <b>2014-0000</b>	
BLANKETTES SERVICE	(888) 490-4321 < Phone	Account #:	
1-888-490-4321	none < Other Phone		
1-888-490-4321	none < Alt. Phone		
Tracking #:			
Register #: 00			
Transaction #: 9999			
Membership #			
Client:			
SAMS CLUB HOME SERVICES » Store #			

3. Carefully inspect the equipment without removing the packaging to ensure that there is no damage (e.g., cuts, tears, scrapes, bends, stains, etc.).
 

**Note:** Any damage that occurs or is discovered after you take possession of the mattress is your responsibility.

**Note:** Do not remove the protective bag or other packaging to perform the product inspection.

  - a. If you find no damage, proceed to step 4 below.
  - b. If you find damage, notify the Click 'n' Pull Associate/Club's Receiving Team Lead, and request a different unit.
    - i. If another identical unit is available, Sam's Club will provide it to you. Inspect the replacement. If no damage is present, take possession of the replacement equipment and proceed to step 4 below.
    - ii. If Sam's Club does not have another unit available, call Installs Field Services at 1-888-490-4321, option 1, then option 1, to report the damage and let the agent know that no replacement is available to complete the job.
      - The Installs agent will place the job in a hold status.
      - Installs will notify the customer that the job must be rescheduled.
      - Installs will reschedule the customer when the replacement equipment is available.

**Note:** When the job is rescheduled, you must print and take the new paperwork to Sam's Club for pick-up, as the new paperwork will have the new (rescheduled) date on it.
4. The Click 'n' Pull Associate will verify the item number(s) and description information on the in-store *Member Information for Delivery Form*.
5. The Club's Receiving Team Lead or management equivalent will sign the *Member Information for Delivery Form*.
6. You must fill out and sign the *Member Information for Delivery Form*:
  - Delivery Company
  - Delivery Person Name (Printed)

- Delivery Person Signature
7. The Click 'n' Pull Associate gives you the yellow copy of the *Member Information for Delivery Form*.  
**Note:** Keep this form; when you complete the job, upload it to the job in DOLI. See the “Submitting Paperwork for Payment” section of this document for details.

## Mattress Delivery Process

1. For each job, call the customer 30 minutes before your arrival to confirm your ETA.
2. When you arrive to deliver the equipment, let the customer/Member know you are there and that you must inspect the delivery location (and set-up location for Premium service) before bringing the equipment in.
3. Before taking the equipment off the truck:
  - a. Inspect the door, door frame, threshold, and pathway to set-up location for any existing damage.
    - i. If you find any damage, write it on the *Installs Installation Workorder* and have the customer sign off next to your notation.
  - b. Measure the doorway to determine if the product will fit through.
    - i. If the mattress will need to be bent at all to get it through the door frame, write "OK to bend" on the *Installs Installation Workorder* and have the customer sign off next to your notation.
4. Bring the equipment into the home.
  - a. For **4300, Basic Mattress Delivery** orders:
    - i. Bring the equipment across the threshold into the customer/Member's home.
    - ii. Leave the equipment in the bag/packaging.
  - b. For **4301, Premium Mattress Delivery, Set-up, and Haul-Away** and **4304, Premium Mattress Delivery and Setup (Serta Adjust)** orders:
    - i. Bring the equipment into the room where it will be set up.
    - ii. Remove the equipment from its packaging once it is in the room where it will be set up.

**Note:** Leave the equipment in its original packaging until it is in its set-up room to protect the equipment and any fixtures in the home.
    - iii. Perform the service as outlined in the Scope of Work and according to manufacturer assembly guides.
5. Ensure that all paperwork is completed and signed/initialed where required:
  - a. Customer/Member completion, signature, and/or initials on:
    - i. *Installs Installation Workorder*
      - Signature
      - Date
      - Printed Name
  - b. Your completion/signature on:
    - i. *Installs Installation Workorder*:
      - Haul Away section if removing old equipment for customer on a premium service
6. Take all paperwork with you when the job is complete. There is no paperwork to leave with the customer/Member.

## 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

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

DIGITAL ON-LINE INTERFACE SYSTEM (DOLI) v3

Logged in - INSTALLER

Home | My Account | Download / Print Orders | New Workorders | Create Custom Orders | Job Number: [ ] FIND

INSTalls Job # >	0000-10	Order ID >	0000010000
Email Address >		Completion Date >	06/03/2011
Created Date >	05/28/2011	Pre-Scheduled Date >	n/a
Install Date >	06/03/2011 - 12:00pm/4:59pm		

hhgregg Appliances - Appliances  
6104 Dishwasher

Current Status: Completed > Complete per Installer

Add / Edit Notes : (Notes entered here will not appear on the printed workorder.)

Account #: [ ] SUBMIT

Form Upload

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

DIGITAL ON-LINE INTERFACE SYSTEM (DOLI) v3

Logged in - INSTALLER

Home | My 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 SA - Scheduled Sort By: Name A

INSTalls Job # >	0000-10	Order ID >	0000010000
Email Address >	NA	Completion Date >	n/a
Created Date >	03/05/2012	Pre-Scheduled Date >	n/a
Install Date >	03/09/2012 - 08:00am/5:00pm		

hhgregg Appliances - Appliances  
6107 Microhood, Ducted or Ductless

Create Custom Print Version History Pay Rate Change Status Scope of Work Equipment Form Upload Appointment Info

Choose a file to upload [ ] Browse...

Select Type Select Here

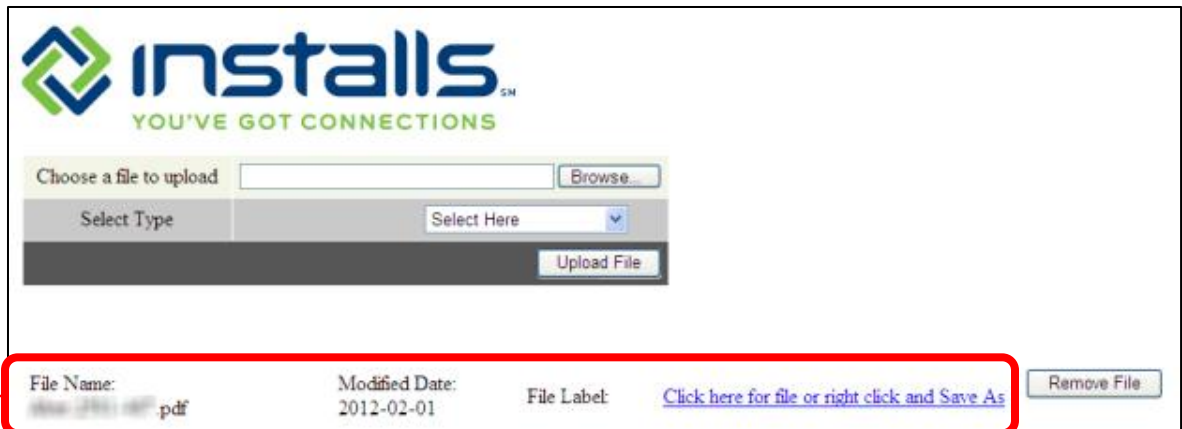
Upload File

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

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

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

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



File Name:	Modified Date:	File Label:	
0000-0000-0000.pdf	2012-02-01	<a href="#">Click here for file or right click and Save As</a>	<a href="#">Remove File</a>

- 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***

1. Email PDF version of your completed, customer signed paperwork to [paperwork@installs.com](mailto:paperwork@installs.com).

## ***Faxing Paperwork to Installs***

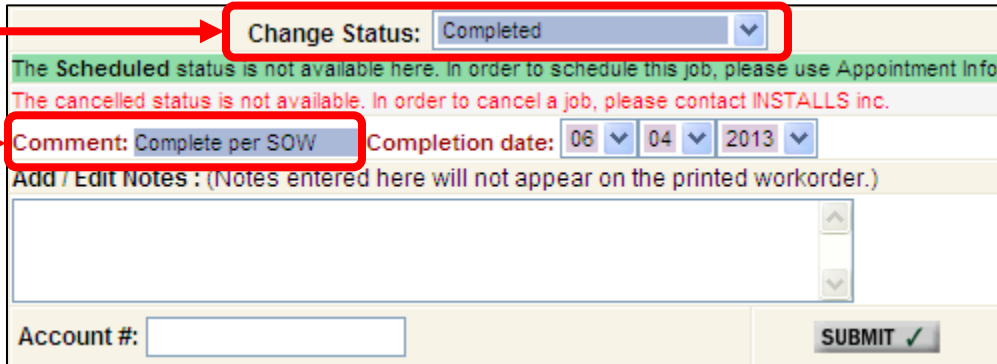
1. Fax to 1-888-655-8621; please be sure to confirm fax was sent, and that all pages were included.

## Closing the Job in DOLI

**Note:** Sam's Club mattress delivery services 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 changing the status of a job. At the top, there is a 'Change Status:' dropdown menu with 'Completed' selected. Below this, there are two lines of status-related information: '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 these, there is a 'Comment:' field with 'Complete per SOW' entered, and a 'Completion date:' field with '06', '04', and '2013' selected. Below the comment field is a text area for 'Add / Edit Notes : (Notes entered here will not appear on the printed workorder.)'. At the bottom, there is an 'Account #' field and a 'SUBMIT' button with a checkmark icon. Red arrows point to the 'Change Status:' dropdown and the 'Comment:' field.

3. From the **Completion Date** drop-down lists, select the month, date, and year you are closing out the order.  
**Note:** Sam's Club mattress delivery services jobs must be closed out in DOLI the **SAME DAY** the service is completed.
4. Enter any comments related to the order closeout in the **Add/Edit Notes** field.  
**Note:** Installs has a liberal viewing policy regarding work order notes and history. Installs clients, their management, and Installs personnel have access to read the comments you enter. Data integrity is important; all comments should be documented in a complete and professional manner.
5. Click the **SUBMIT** button to save the status change and notes.

**Note:** This closes the job.



