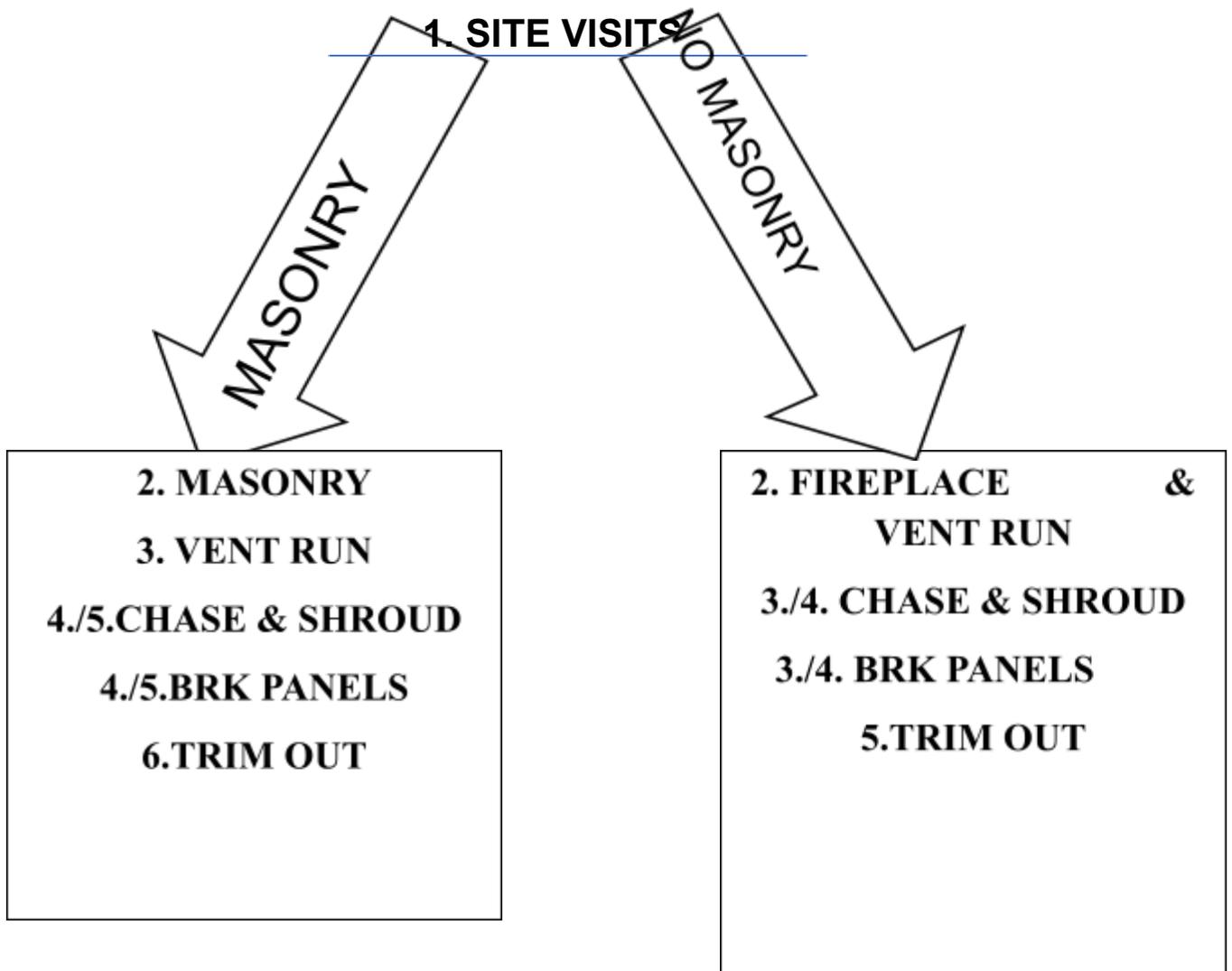


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**STEPS FOR SERVICE AND INSTALL**



## **SERVICE CALL**

**\*UNRELATED TO INSTALL STAGES, JUST A ONE-OFF SALE OF A SERVICE ITEM(S).**

## **WHO ARE THE TECHS?**

# FIELD SUPERS

<b>FIELD SUPERVISORS</b>	<b>SPECIALTY</b>
<b>IAN S.</b>	<b>ALL SITE VISITS/SERVICE</b>
<b>LIBO</b>	<b>INSTALL FIELD SUPER</b>
<b>JUSTIN BAKER</b>	<b>INSTALL FIELD SUPER</b>
<b>TRENTON NELSON</b>	<b>BRICK/MASONRY/SERVICE</b>

**WHO ARE THE TECHS?**

# INSTA

TECHS	SPECIALTY
AARON FRAUSTO	INSTALL/CHASE/SHROUDS
ALFONSO	INSTALL/CHASE/SHROUDS
STU	INSTALL/CHASE/SHROUDS
ELISEO	BRICK/MASONRY
JOE	BRICK/MASONRY
JAY	ELECTRIC INSTALL/ CT/SHROUD/TRIM

TECHS	SPECIALTY
DAVE	TRIM
DOUG	TRIM
MIKE L.	TRIM
MIKE F.	TRIM
ROB	TRIM

## SITE VISITS

1. Submit welcome packet email (Attached page 6B). to the customer through email containing fireplace and AZ Fireplaces Manual find welcome packet attached.
2. Create work order See Page 17-18 (Please advise Work Order will be used the whole Install process.)

3. Fill out Site Visit form based of checklist. (Attached 6-6A).  
Call customer to get on schedule for site visit. (Schedule a date not a time.)
4. Have sales order open and create notes in “Scheduling Format” (see page 16 if not familiar). Let customer know on that phone call that the field supervisor (Ian or Trenton) will call them the same day as the site visit to schedule a time frame that works best.
5. Field Supervisor goes and completes site visit and uploads all of his notes to concord.
6. Send over those notes to
  - a. Customer-They are responsible for preparing area and completing any adjustment prior to install.
  - b. Sales- They are responsible for updating sales order if there are any fireplace issues.
7. Deliver Site Visit on ticket once the visit is complete.
8. Move into next bucket accordingly whether it be Masonry or Installation.

## **SITE VISITS-CHECK LIST**

MM L x W x H AND BASE:

PLACEMENT OF GAS LINE:

ELECTRICITY:

TERMINATION REQUIREMENTS (HORIZONTAL/VERTICAL OR POWER VENT):

CHASETOP/ROOF-JACK:

SHROUD:



**\*\* (IF THERE IS NO MASONRY UNIT ON YOUR ORDER GO TO PAGE 9.) \*\***

1. Check stock on mason Lite that is on ticket.
2. If we do have Mason Lite in stock call customer to schedule, have a date and time picked out prior to phone call.
3. Have sales order open and create notes in “Scheduling Format” (see page 16 if not familiar).
4. Go to sales order and make sure dates for Masonry unit only are correct and pick tickets are closed.
5. Once scheduled on pest routes and sales order revision is done be sure to flip into AZF Install bucket. (Anything in this bucket is scheduled.)
6. Add to “Order Type-INSTALL” excel for the scheduled date and under the correct tech and stop #.

7. AFTER Masonry is complete review Tech notes and concord and based off that complete delivery, please see page 19 for delivery steps. Flip sales order into “Installation bucket”.

## VENT RUN

8. Call customer and schedule vent run and repeat steps 2-7 instead of Masonry just verify venting dates are correct.
9. AFTER vent run is complete review Tech notes and concord and based off that complete delivery, please see page for 14. Flip sales order into “Chase and Shroud” or “BRICK” based on which is next.

## MASONRY-VISUAL



MASONRY WITH VENT RUN



MASONRY WITH VENT RUN



## BRICK

### MASONRY WITH VENT RUN

# ROUGH INSTALL

1. Check stock on Fireplace that is on ticket and any venting that shows stock of 5 or less.
2. If we do have Fireplace and venting in stock call customer to schedule, have a date and time picked out prior to phone call.
3. Have sales order open and create notes in “Scheduling Format” (see page 16 if not familiar).
4. Go to sales order and make sure dates for fireplace and venting are correct and all pick tickets are closed.
5. Once scheduled on pest routes and sales order revision is done be sure to flip into AZF Install bucket. (Anything in this bucket is scheduled.)
6. Add to “Order Type-INSTALL” excel for the scheduled date and under the correct tech and stop #.
7. Make sure to call tech 1-2 days before job to verify parts are sufficient.
8. AFTER fireplace and vent run are complete review Tech notes and concord and based off that complete delivery, please see page 19 for delivery steps. Flip sales order into

“Chase and Shroud” or “Refractory” based on which step is next.

# ROUGH INS

PLEASE BE SURE TO NOT SCHEDULE ANY PAST DUE 00 ACCOUNTS! MAKE SURE NO BALANCE IS DUE!



P  
OS

1. Installers get dimensions and upload them in a photo to concord.
2. Get measurements from concord and call customer and ask what will be the finishing material.
3. Based on finishing material add inches to measurements.
  - a. Stucco – Add 3 inches
  - b. Brick- Remeasure after complete.
  - c. Stone- Remeasure after complete.
4. Complete chase and shroud form and manufacturing request, work order and submit all to Manufacturing email (SEE PAGE NEXT PAGE- FOR EXAMPLES OF WHAT THESE SHEETS SHOULD LOOK LIKE.)
5. Wait for manufacturing to get back to you, set date out for 2 days on calendar. Follow up until Manufacturing request is fulfilled then call customer to schedule, have a date and time picked out prior to phone call.
6. Have sales order open and create notes in “Scheduling Format” (see page 16 if not familiar).
7. Go to sales order and make sure dates for Chase/Shroud are correct and all pick tickets are closed.
8. Once scheduled on pest routes and sales order revision is done be sure to flip into AZF Install bucket. (Anything in this bucket is scheduled.)
9. Add to “Order Type-INSTALL” excel for the scheduled date and under the correct tech and stop #.



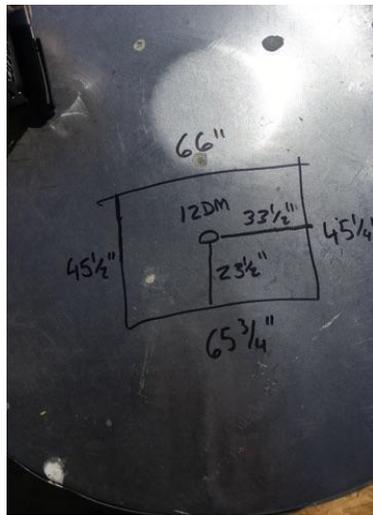
**AFTER Chase/Shroud is complete review Tech notes and concord and based off that complete delivery, please see page 19 for delivery steps. Flip sales order into “Trim” or “Refractory” based on which step is next.**

## **SHROUDS-CHASE**

## **TOPS-STORM COLLARS**



## STORM COLLAR



## SHROUD



## CHASE TOP W/ TERM CAP

MEASUREMENTS

# TRIM OUT

## What is Trim?

Last step for Project. Usually consist of media, log sets, burners & etc.

1. Call customer to get on schedule for TRIM.

2. Create work order See Page 17-18 (Please advise this Work Order will be used ONLY for service.)
3. Verify on the phone call that customer has gas & power. If the do not we can still service unit however we cannot test the unit, if they would like unit tested it will be an extra charge of \$185. Caveat; Particular units require gas and power to be hooked up prior to install. (Manufacture Required.)
4. Have sales order open and create notes in "Scheduling Format" (see page 11 if not familiar).
5. Go to sales order and make sure dates for Trim parts are correct and all pick tickets are closed. Switch order into AZF Service bucket.
6. Schedule on pest routes and add to "Order Type-Service" excel for the scheduled date and under the correct tech and stop # be sure to add comment informing the warehouse which parts are needed.

PLEASE BE SURE TO NOT  
SCHEDULE ANY PAST DUE  
00 ACCOUNTS! MAKE  
SURE NO BALANCE IS  
DUE!

7. AFTER Trim work is complete review Tech notes and concord and based off that complete delivery, please see page 19 for delivery steps.

8. This should be the final step and Sales Order should be completed.

## TRIM



TRIM OUT W/  
LOG  
INSTALL

**TRIM OUT W/  
DYNAMIC  
HEAT  
CONTROL**



**SERVICE CALLS**

**UNRELATED TO INSTALL STAGES, JUST  
A ONE-OFF SALE OF A SERVICE  
ITEM(S).**

**\*Follow same steps for service calls as trim  
however this will most likely be a onetime deal.  
(SEE PAGE 13.)**

**Don't forget to schedule on pest routes and add to "Order Type-Service" excel for the scheduled date and under the correct tech and stop # be sure to add comment informing the warehouse which parts are needed.**

## **SCHEDULING FORMAT**

**\*Notes should be in SCHEDULING sections in the user defined fields.**

**Format should be:**

- A. Order Type** (Site Visit, Rough Install etc.)
- B. Date of scheduled visit**
- C. Tech Name**
- D. Work Order #**

## **CONVERSATION DOCUMENTATION**

**\*Notes should be in APPROPRIATE sections in the user defined fields.**

**Format should be:**

- A. Order Type** (Site Visit, Rough Install etc.)
- B. Date of scheduled visit**
- C. Tech Name**
- D. Work Order #**
- E. Brief summary of conversation with customer.**
- F. Schedulers Name**
- G. Current Date & Time**

## **WORK ORDERS**

**\*Once a sales order is created and the customer is on the schedule. It's now time to create a work order.**

**Step 1:** On the bottom right-hand side of the sales order, click the 'copy to work order' button.

**\*Once this button will click, a pop up will appear with the work order number. This number is true. Click ok.**

**Step 2:** The work order will open in SAP. (I like to break the work order down into two sections, top and bottom)

**Step 3:** Select the WO type. 'Service', 'Install', 'etc.'

**Step 4:** Select the WO order stage as 'technician assigned'.

**Step 5:** Select the team. To select the team, click on the magnifying glass. 'SRVFLD' for service and 'Install' for rough in.

**Step 6:** Select the tech. The default tech is always Justin Baker who is tech 74. A trick I like to use, aim your mouse over the 4. A pop-up box will appear, click the

technician. (If you double click the first name it will place the techs in alphabetical order)?

**Step 7:** On the top right side select the status to 'assigned'.

**Step 8:** Double check the schedule date. This date should be the date the appointment is scheduled for.

**Step 9:** On the bottom section of the work order enter the Summary. The summary and cause should be the same. This is what the tech will be doing at the job.

*\*format\** Date of service, type of appointment. COD (does not always apply)

EX- 6/1/21

*\*COD \$185 PENDING PARTS\**

SERVICE CALL X1

LV62 NG UNIT WILL NOT LIGHT. SHE HEARS CLICKING BUT PILOT WILL NOT LIGHT.

## WORK ORDERS

**Step 10:** Click the remarks tab. In the remarks tab Enter the sales order # and the customer contact info.

*\*format\**

EX- Sales Order 123456

Teara Canning-555-555-5555

1234 Sesame St

Phoenix, AZ 85040

**Step 11:** Enter the same notes in the cause that you did in the summary and the appropriate template.

6/1/21

*\*COD \$185 PENDING PARTS\**

SERVICE CALL X1

**LV62 NG UNIT WILL NOT LIGHT. SHE HEARS CLICKING BUT PILOT WILL NOT LIGHT.**

Enter the template under the notes regarding the jobs

**Step 12:** Click update.

**\*\*If you have not entered the work order number in pest routes and the scheduling dates sections yet make sure you go back and enter the wo#!**

## **DELIVERIES**

- **Step 1:** On the bottom right-hand side of the sales order, click the 'copy to' button and select copy to delivery. A box usually stating the customer has a balance owed will pop ok, click ok.
- **Step 2:** The delivery will appear. On the bottom right-hand side, click the 'copy from' button and select sales order. This will generate all the sales order the customer has open. Make sure you select the correct sales order # to copy from.
- **Step 3:** The draw document wizard will pop up, make sure each selection is clicked on the bottom. \*Once you do this, it will save your selection. I always like to double check by going "bottom, bottom" and then click next.
- **Step 4:** Select all the items that were completed at rough install. Hold the control button while selecting the line items. Once all the line items that were completed at the stage you are delivering have been highlighted, click the 'finish' button.

- **Step 5:** Change the date. The posting date and document date should be the date the install was complete. The document date is the date that you are creating the document.
- **Step 6:** Make yourself the owner. If you create a document, you are the owner of the document.
- **Step 7:** Select the logistics tab. In the shipping type, select and scroll to delivery install. In the tracking number field. Enter the tech name and the date of install/service. At this point double check everything on this document. Once everything is double checked and you are confident the delivery is correct.... Click add.

# INVENTORY POSTING LIST

## HOW DO I GET THERE TO LOOK UP AN ITEM?

- >MODULES
- >INVENTORY
- >INVENTORY POSTING LIST
- >SEARCH PART
- >GO INTO INVENTORY TAB

	Maint Sch	Inventory Data	Planning Data		
locked	In Stock	Committed	Ordered	Available	Min. Inve
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>	8	10	6	4	
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

**The column showing 8 is how many are available in the warehouse.**

**The column showing 10 is how many orders are open for the product.**

**The column showing 6 is how many are on order.**

**The column showing 4 is how many are available in total including ordered.**