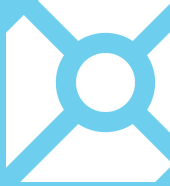# installnet

Inspired Workspaces Made Easy

Service Provider

Handbook

Welcome to Installnet!

Welcome to Installnet. You have joined a unique elite network in the office furniture installation industry.

Installnet is a project management company that facilitates the installation, decommission, and moving of commercial office furniture across the United States,Canada and beyond. Our professional staff is experienced in managing furniture systems and casegoods in,stallations, enabling our customers to confidently expand their sales nationwide. Our success is based on our national network of over 275 dedicated, professional, and independent installation companies that provide outstanding customer satisfaction from quoting through final punch lists, providing our customers peace of mind.

As the network continues to expand, it is essential that we recruit installation companies that share our same values and beliefs. We are proud of the success of Installnet and look forward to establishing a partnership with your company that provides continued growth for everyone.

This handbook will help you get up and running quickly. It provides detailed information about working with Installnet, and it will be a great resource for your employees.

If you ever have any questions, please contact us. We look forward to working with you.

Dale Ewing
President and Founder of Installnet

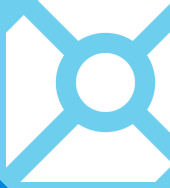# Table of Contents

Getting Started Checklist

To help you get off to a smooth start, please review the checklist below and complete the following tasks as quickly as possible. Familiarize yourself with Installnet by reviewing all information included in the "Welcome to Installnet" email you received, which includes:

- This Service Provider Handbook – for your reference

- Installnet's Service Provider Agreement and Addendum A - please review, sign and return all pages

- W-9 form – please complete and return

- Request for Insurance Certificate listing Installnet as additional insured (see Page 7 for requirements)

- Installnet Designated Contact and Key Contact Form – please complete and return. **

- Installnet ACH form – please complete and return along with a cancelled/voided check

- Installnet's Delivery and Set-up Pricing Matrix including man-hour rate and overtime rate –please review and complete and return. **

- Request for your company logo (in .jpeg or .gif format) and any company marketing brochures – please email along with all other documents

Upon receipt of these items, you will be scheduled for a brief web-based orientation. Following the completion of the webinar, you will receive your member log-on credential information, be added to our Service Provider Members List and be eligible to receive work from Installnet.

We invite you to go to the website and familiarize yourself with InstallTRAK and check out Provider Resources.

**Please keep in mind moving forward you will log into FacilityNET and make any adjustments yourself.
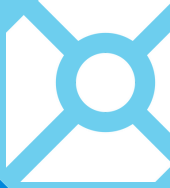
Installnet - Our Guiding Principles

Life and business are about **people**. The pace of change and disruption is accelerating and we all feel the pressure to keep up in both our personal and business lives. We work hard to make a difference in the world.

Installnet strives to make each interaction with people a little friendlier and a little more welcoming, reaffirming our underlying belief in people, and showing we care about their happiness and success.

We promote a sense of belonging by building a team that cares about people and strive to make a personal connection in a fast-paced world.

Our Purpose
Our Purpose identifies the "Why." It is why we show up every day and goes beyond the financial benefits to our employees and the company. It articulates why Installnet matters and how we strive to develop relationships with our customers, service providers and employees.

- We create value and opportunities for growth by
  - anticipating and identifying challenges
  - creating solutions and
  - celebrating success of shared goals.

Our Mission
Our Mission describes what Installnet aspires to be for our customers.
- To be the core national service network for the office furniture and facility services industry through relationships built on trust, processes resulting in industry-setting standards, and integration of e-commerce platforms.

Our Core Values
Our Core Values are not just words, but they are a way of life. They are our highest priorities and the fundamental driving force behind what guides, motivates and inspires us to continually improve every day.
- Creating Win-Win-Win Relationships
- Taking Responsibility For Results
- Open And Honest Communication
- Continuous Learning
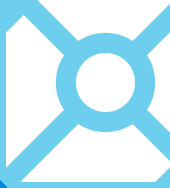
Who Benefits from Installnet? Everyone

Benefits to Service Providers that join the Network

- Incoming Installnet work for service providers in their local market from national dealers and customers located throughout the country.
- Online access, tracking and updating for all Installnet jobs and summary reports on all work.
- Ability to attend the Installnet Service Provider Conference, which provides the opportunity to network with other installation companies from across the country and share solutions to common industry issues.
- Member buying group discounts on items such as equipment, truck purchasing, leasing, business insurance and uniforms.
- Service Provider Evaluations completed by Installnet Project Managers for every Installnet job which provide excellent feedback on meeting Installnet service standards and your on-site installation teams.
- Ability to partner with ecoServ to provide your local customers decommission strategies.
- Immediate inclusion as a service provider on Installhub providing direct access to 500+ customers.
- Ability to manage your customer's intermarket work directly with providers through Installhub.

Benefits to Customers that use the Network

- ·Access to a network of high quality, pre-qualified and independent furniture installation companies throughout the United States and Canada.
- ·Confidence that service providers meet high service standards and all legal and insurance requirements.
- ·Consistent, simplified and standardized service process that reduces the cost and hassle of contracting with individual companies that is consistent for every job.
- ·Access to a secure website that allows customers to submit quote requests and track the status of their jobs online in real time.
- ·Assigned a project manager for a single point of contact and accountability.

Qualifications and Requirements

The Installnet network is only as strong as out partners companies. We look for the following attributes and qualifications when recruiting new members.

- Must be a professional installation company with excellent references that specialize in installation service only. The company **may not** offer new furniture sales or share ownership with a furniture dealer or manufacturer.
- Must provide full-service installation services and include the following resources:
  - Manned warehouse
  - Trucks
  - Trained and uniformed crew on site (10+ employees) to include proper PPE when requested
  - Adequate equipment per truck, including handcarts, dollies, straps, pads, touch-up kit, wipe down kit and tools (see Suggested Tool List on page 18).
  - Ability to take and send digital pictures from job site
- Must have gross volume over $500,000 annually.
- Company must have been in business for at least 2 years and have active ownership that is accessible and interested in building a long-term relationship with Installnet.
- Must have general liability of $2 million (aggregate including umbrella) as well as a minimum of $1 million in auto coverage and $100,000 in workers compensation coverage or the statutory amount required by the state, listing Installnet as additional insured.
- Must embrace technology and meet minimum service standards developed by Installnet for efficient communication including email, scanning capabilities, internet access, as well as the ability to read Microsoft Office Suites and Adobe Acrobat Reader files.
- Average or better credit and payment history.
- Highly responsive and dedicated to outstanding customer service.
- Provide an Installnet Designated Contact in addition to key contact information for those responsible for quoting, scheduling, warehousing, and paperwork.
- Must have network affinity and sign an Installnet Service Provider Agreement (with Addendum A).
- Must meet Installnet's service standards for job process and jobsite performances as outlined in Addendum A - Service Provider Standards.

Performance Standards Summary
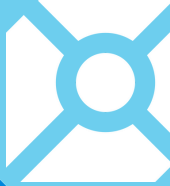
Installnet is a platform-based project management company. It is critical for all network providers to be familiar with all expectations of Installnet, as well as embrace platform requirements that will streamline communications and overall services. This is a summary of Installnet's Service and Performance standards.

Quoting
- All quotes returned to Project Manager within **24 hours** via website update, scan/upload to the job on the website (choose File Type "Signed Pre-Priced Estimate"), or email.
- Quotes over $2,500 may be given additional response time.

Receiving of Product
- Notify Installnet PM via InstallTRAK within **24 hours** of each shipment received.
- ALL receiving documents (*i.e. packing slips/receivers/BOL, etc.*) for all receipts must be scanned/uploaded to the job on the website (choose File Type "Receiver")

Scheduling
- Schedule the project with the end-user within 72 hours of receipt of all product and notify Installnet PM via InstallTRAK of confirmed schedule date, unless otherwise stated.
- If the Installnet customer is coordinating the scheduling with the end-user, provide Installnet PM with start date options within 72 hours of all product received.

Problems on job site:
- Real-time, onsite communication with Installnet Project Manager of all issues, problems, exceptions or concealed damage.
- Must provide digital pictures and detailed information on Installnet Punch List regarding any and all issues, problems or damages on site.
- Must have a digital camera, phone or ability to take photos on each job.

Job Completion:
- ALL pages of the Installnet work order (including the punch list page) must be signed by both the end user and installer at site and then scanned/uploaded to the job on the website (choose File Type "Signed work order"), within 24 hours of job completion (including the punch list).
- Update the job completion status with either "100% Complete" or "Complete with Punch" in the InstallTRAK Details
- Photos must be uploaded to the job on the website (choose File Type "Photos").

Evaluations
- Earn a minimum **70 NPS** Survey Score

Job Flow Process

Installnet has developed a platform-based, detailed job flow process that ensures regular communication between Installnet PM, their customers, service providers and end users. By following this detailed job flow, we can help ensure a successful installation experience.

Quoting Process – Installnet's standard for quoting is a 24-hour turnaround for all quotes, unless otherwise noted by the Project Manager (PM).

- Installnet PM will receive a quote request from client.
- PM will price the job using case good price list or system furniture pricing by man-hour estimate, piece-count, market rate and/or knowledge of client pricing structure.
- PM will email a *Pre-Priced Estimate* to the Service Provider (SP). *A Bill of Material* (BOM), floor plan and prints, when applicable, are attached to the job on the website. If SP does not have plotter access, PM will overnight prints for large jobs.
- SP will review Pre-Priced Estimate (PPE) and submit pricing back to Installnet PM within 24 hours (unless otherwise noted by the PM). The following ways are acceptable to submit pricing:

1. **This is the preferred method)** Update the pricing directly in the job on the Installnet website. The pricing can be adjusted or accepted as stated on this tab. Provider can also include comments, as well as attach company specific quote forms.
2. Provider can print the PPE that is attached to the quote request email, and:
   - Adjust the price on the document via Adobe Writer and scan/upload the PPE directly into the job (choose File type Signed Pre-Priced Estimate).
   - Write the adjusted price on the document and scan/upload the PPE directly into the job (choose File type Signed Pre-Priced Estimate).
   - Write the adjusted price on the document and email directly to the PM.
3. Provider can respond directly to the quote request email back to the PM. Please reiterate   the approved pricing in the email note.
   - PM will review price submitted by SP and call if additional negotiations or information is required for the client.
   - PM will then submit a Quote to client.

Cont. Job Flow Process

- **Turning a Quote to a Project**
  - Installnet receives a Purchase Order (PO) or signed quote from the client and reviews for discrepancies.
  - Once approved, Project Status on the web site will change from "Final Quote" to "Project".
  - SP will receive an automated email with the PO and Work Order attached. The email also will contain links to any project attachments as well as the Project page where all aspects of the job can be reviewed. The SP should print the work order, BOM and prints (if applicable) from the Installnet website and take to the job site on day of installation.The PO should remain at the SP office.

- **Receiving of Product** - Installnet's standard for receiving is 24-hour notification of product received via InstallTRAK, as well as uploading of all paperwork directly to the job.
  - Verify the integrity of product when the door to the truck is opened.
  - Verify product received matches the Bill of Lading (BOL) or shipping packing slip to confirm the product is being delivered to the correct address.
  - Verify count – If a circle (or bingo) sheet is included with the packing list and Bill of Lading, it must be used to verify count. If a circle (or bingo) sheet is not included, the total count received must match the total count on the Bill of Lading. If shortages are discovered, have the freight company driver sign and note the number of missing packages on the Trucking Company Delivery Receipt (Bill of Lading). You should only sign for the exact number of packages received. A copy of the trucking company delivery receipt should be retained for your records.

A visual inspection of the carton exterior must be made immediately and PRIOR to signing the bill of lading. If there is any doubt regarding damage to the carton, the product should be uncartoned, inspected and a picture taken of the box and the product.

1. Any carton damage, including dents, creases, punctures or crushed corners, must be documented on the BOL (even if it is minor).
2. Notify the driver of the damage and describe damage on all copies of the BOL or shipping packing slip including model number.
3. Take digital pictures of the carton and the product and scan/upload to the website (choose File Type "Photo") or email them.

  - If exterior carton damages are discovered, open damaged cartons immediately and inspect the product. If there is noticeable damage, notify Installnet PM immediately.
  - If PM advises to refuse product, write down manufacturer, model number and serial number of refused product (if applicable) and sign the shippers Bill of Lading noting there is damaged product. Scan/upload the Bill of Lading with notations to the website (choose File Type "Receiver").

Cont. Job Flow Process

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  - Installnet receives a Purchase Order (PO) or signed quote from the client and reviews for discrepancies.
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  - If PM advises to refuse product, write down manufacturer, model number and serial number of refused product (if applicable) and sign the shippers Bill of Lading noting there is damaged product. Scan/upload the Bill of Lading with notations to the website (choose File Type "Receiver").

Cont. Job Flow Process

- If PM advises to accept product, sign the shippers Bill of Lading, and note damaged product. Scan/upload the Bill of Lading with notations to the website (choose File Type "Receiver").

- Failure to follow these procedures and provide the appropriate documentation may result in the service provider being held responsible for any damages.

- If a full or partial shipment of product is refused due to damage, take pictures to document the issue before it is returned to the truck.

- Compare BOL/shipping packing slip to Installnet work order and/or BOM and notify the Installnet PM immediately of any discrepancies. If the product arrives without an Installnet job number, please email the BOL/shipping packing slip to unidentifiedproduct@Installnet.com for assistance in identifying the appropriate job.

- Log on to Installnet website, select the appropriate job and update the receiving status in the InstallTRAK Details within 24 hours. Any and all receiving paperwork (packing slip/receivers, BOL, bingo/circle sheets, photos of shipping labels, etc.) MUST be scanned/uploaded to the website (choose File Type "Receiver"). On multiple shipments, it will be necessary to update InstallTRAK with each receipt of product within 24 hours of receipt.

- The Service Provider is responsible for verifying all product is received and should update InstallTRAK to "All Product Received". The Installnet PM will use the receiving documents provided to also confirm all product has been received.

- If a decision is made by the customer to schedule a job despite missing product, an additional trip may be necessary. Installnet will create a new project number/purchase order for any new charges.

- Scheduling - Installnet's standard for scheduling is to contact the end user within 72 hours and update the InstallTRAK, unless otherwise specified by the PM.

- ·The SP will schedule the project directly with end user within 72 business hours of receiving ALL product, unless otherwise specified by the Installnet PM. Verify address and building conditions with the end user.

- Log on to Installnet website, select the appropriate job and update the scheduled date in the InstallTRAK details. In the comment section, please note who confirmed the appointment.Leaving a voice mail does not confirm an appointment; SP must speak to and confirm with the end user.

- NOTE: If a customer has requested a specific install date, it is still the responsibility of the Service Provider to contact the end user to confirm the delivery date, as well as verify address and building conditions with end user.

Cont. Job Flow Process

- Problems on Job Site - Installnet's standard for problems on the job site is real-time, onsite communication for all damages, issues, or problems at site.

- The SP must contact Installnet PM immediately with any issues at the job site that might preclude the job from being completed or may require additional charges, including downtime, job scope changes, stair carries or inaccessible work areas.

- NOTE: The Installnet work order is the contract that Installnet is held accountable to by their customer. ANY deviation from the stated scope cannot be completed without prior authorization. The SP MUST contact their Installnet PM for approval for any and all job scope changes prior to performing the work, as well as notate these changes on the work order.

- Concealed Damages - Installnet's standard for concealed damages is real-time, onsite communication to the Installnet PM for all damages, as well as digital photos prior to installation.

- Upon opening the carton, a visual inspection of the product must be made immediately and PRIOR to installation. Any product damage, including dents, scratches, scuff marks or upholstery defects, must be documented on the Installnet work order / punch list.

- Call Installnet PM immediately from job site with information regarding the damage

- Provide a detailed description of the damage with digital pictures of both the product and the box. Determine if it is repairable and, if so, what needs to be ordered

- Provide Manufacturer name and serial number, if applicable. (HON product, which requires a serial number for all damaged product, can usually be found in the ped drawer)

- All damages discussed with the Installnet PM must be documented on the Installnet work order / punch list

- Save the box and any packing material for inspection and/or for returning product. You may be advised to bring the product back to the warehouse

- Description of the damage, digital pictures and product information must be scanned/uploaded to job on the website (choose File Type "Photo - Damages")

- Freight claims must be initiated by the dealer; however, a freight inspector will contact SP to schedule the inspection.

Cont. Job Flow Process

Additional Charges

- Call Installnet PM to get approval of additional charges PRIOR TO PERFORMING ADDITIONAL WORK. Be specific about what the actual additional work entails and the estimated charges to complete if it would take more than 15 minutes (i.e., downtime, job scope changes, stair carries, inaccessible work areas, etc.).

- Installnet PM will receive approval for additional work from client and will give you a verbal approval.

- Justification and description of the work performed must be notated on the work order and signed off by the end user after approval has been obtained by Installnet.

- Installnet PM will issue either a revised PO or new PO for the approved additional work.

- No additional charge invoices will be paid unless you receive approval from Installnet and a PO that covers this work.

- Job Completion - Installnet's standard for job completion is to update the InstallTRAK within 24 hours of job completion with status, as well as uploading the Installnet work order and all other documents and/or photos.

- Log on to Installnet website, select the appropriate job and update the job completion status with either "100% Complete" or "Complete with Punch" in the InstallTRAK Details

- The Installnet signed work order (and all other required paperwork as requested) must be returned within 24 hours of job completion (including a detailed punch list if applicable) via scan/upload to the website (choose File Type "Signed work order").

- NOTE: ALL pages of the Installnet work order must be uploaded to the job within 24 hours of job completion. It is also required that both the end user and the installer sign and date all pages where required.

- Photos must be scanned/uploaded to the website (choose File Type "Photos")

Billing

- Invoices should be faxed to our finance department at 866-850-9797 or emailed to finance@Installnet.com. Please do not scan/upload invoices to the job on the website.
- The Installnet Project Number/Purchase Order must be on your invoice.
- Your invoice will be approved immediately if it matches our Purchase Order/Project Number amount and a signed work order has been received. Invoices that exceed the PO amount can lead to payment delays.
- Once approved, Installnet will pay invoices within terms.

Cont. Job Flow Process

- Unless explicitly stated in the Description of Work, Installnet Project Managers price all jobs as Receive/Deliver/Install/Remove Debris under normal conditions, which include:
- ·Regular business hours (Monday to Friday; 8 am – 5 pm)
- ·Loading dock and freight elevator available
- ·Installation is no more than a 50-yard push from the loading dock
- ·No steps
- ·Installation area free and clear of personnel, existing furniture or any object that may impede delivery/installation
- ·No disconnect or re-connect of electrical hardwiring, phones or cabling
- ·Within your standard delivery radius (does not include travel)
- ·Non-union labor
- Exceptions to normal conditions or specific situations are noted in the Description of Work and may result in additional charges to the job. Additional charges may include, but are not limited to:
- After hour delivery – In addition to deliveries outside normal business hours, this includes weekends or holidays.
- Stair carry - Jobs that require stair carry should be itemized as an additional cost, in addition to the standard receive, deliver and install price.
- Storage – Service Providers agree to provide free storage for 30 days from the receipt of product. Prior to the conclusion of the free storage period, the SP will notify the PM of rates for storage to be determined by either square feet, pallet or bay figured on a monthly basis. The PM will get authorization from the customer for a new Purchase Order. A new PO will be issued for each additional 30 day storage period.
- Travel – Jobs that extend outside your standard business/delivery radius should be itemized as an additional cost.
- Interior Carton Inspection – Full product inspection is available to clients upon request for an additional cost.
- Building Requirements – Some buildings may require high security clearance, special permits or additional Certificate of Insurance levels.
- Special Labor Laws – Projects that require documentation for Prevailing Wage, Certified Payroll or adherence to Davis-Bacon regulations.

Assembly Guidelines
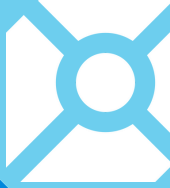
Installnet pricing is based on the level of assembly required as generally described below:

Standard Assembly includes:
·removing from box and placing in location
·removing packing materials and level product
·attaching table legs or bases
·connecting desktops, returns, keyboards, center drawers, and hardware
·placing hutch but not assembling it
·installing task lights, lock cores and keys

Light Assembly includes:
·   built components that require assembly (pedestals that are attached to a desk shell, modesty panel) may include the product being flat with cam lock construction with fasteners pre-attached from factory
·   hutches pre-assembled that may need doors attached
·   attaching chair arms, cylinders and backs
·   bookcases
·   printer stands
·   ganging/attaching items together

Heavy Assembly includes:
·completely KD product which requires assembly for every part of the product (some examples include Bush, Alera and Tiffany; Sauder, and O'Sullivan)
·product arrives completely flat with fasteners requiring attachment
·pedestals & hutches needing assembly
·multiple variations of support possibilities (requiring specifics from specifying dealer)
·mail sorters

Suggested Tool Kit

Below is a comprehensive list of tools that are recommended when on site for the installation of any type of office furniture.

- Dollies, Carts and Hand Trucks
- Truck Ramp (or access to one if necessary)
- Masonite, Corner protectors
- Furniture pads, Straps, Tie Downs
- Cordless drills, Cord drills with impact feature (for masonry walls)
- Tape
- Digital Camera
- Furniture Skates
- Toggles
- Cleaning kits
- Sawzall, Circular saw, Jigsaw
- Vacuum
- Clamps
- Change keys
- PPE – Hard Hat, Safety Glasses, Vest, Steel Toe Boots
· Tool Bags (to include all tools necessary to assemble any type of office furniture)
    - Box Knife
    - Channel Lock / Needle nose Pliers
    - #2 & #3 Phillips Head Bits, 1/4 & 5/16 Nut Drivers and Torx #45 Bit
    - Rubber Mallet
    - Claw Hammer
    - 25' Tape measure
    - Speed Square
    - Assorted Screwdrivers
    - Hacksaw
    - ¼ Drive Socket/Ratchet Set
    - /4, 5/16, and 3/8 socket
    - SAE and Metric Fasteners
    - Pry Bar
    - Awl
    - Drill Bit Set to include 3/16, 3/8 and ½ inch bits
    - Driver Bit Set
    - Assorted Screws to include Magnetic ext. & Robertson
    - Bits: Phillips, Torx Hex Bits, Socket
    - Box Wrench (complete set from ¼ to 5/8 inch)
    - Torpedo Level
    - Snips
    - Wall Mounting Anchors (zip its, tapcons, drywall screws, etc.)
    - Side Cutters
    - String
    - Circuit Tester
    - Allen Wrenches (complete set)

Using the Installnet Website

All Service Providers (SP) are required to access and update Installnet projects online in the Member Login Area. InstallTRAK provides a "dashboard" view of all the projects the SP has with Installnet, including summary reports and graphs. Service Providers are required to print Installnet Work Orders as the official sign-off paperwork onsite. Service Providers are also responsible for updating InstallTRAK for receiving, scheduling, and job completion. The web site also provides current Installnet News, updates, and Service Provider Resources Area.

To receive a username and password, please contact the Service Provider Development Team at 443-302-6391.

Member Login Procedures:

1. Go to www.Installnet.com:

1.Click on Member Login in top right corner

2.Enter your username

3.Enter your password

4.Click on Login in blue box

Member Home Page Overview:

1. When you login, the first page that opens is the Member Home page.

1. The main screen will show Provider InstallTRAK Reports. This is an overview of your jobs in each status (default view is for those jobs created in the last 90 days):
· Estimate: Jobs in Estimate Status are waiting to be priced and returned to the PM.
· Final Quotes: Jobs in Final Quote Status are awaiting approval from the customer.
· Open Projects: Jobs in Open Project Status have been awarded to the Provider. These jobs are typically awaiting product and/or scheduling. There are various subcategories within Open Projects that help best manage these jobs
· Completed Jobs: Jobs in Completed Job Status are complete.
· Canceled Jobs: Jobs in Canceled Job Status have not been awarded, and are therefore, canceled.

2. Clicking on any Current Status will provide more detailed information on individual jobs.

NOTE: Those with Member-Manager access will also see Executive Summary and Trend Analysis views and reports at the bottom.

3. In the blue Menu Bar (on the left), there are additional reports and functions including Open Receivables, Provider Resources and a current Installnet Employee Contact List.

4. To return to your home page at any time, click on the Installnet logo in the upper left-hand corner of the screen.

Project Page Overview

443732 - ARC303 - Irvine, CA {Decommission - IBI Merge} (Site Visit)

| Project Administration | Pricing | Attachments | InstallTRAK/Shipping Info/Punch | Emails | Surveys |

Project Administration: Send Email

Project Type: Site Visit
Project Status: Deselected: Waltek West, Inc. did not win this work for reason: response time
Team: Go Green Team
Project Coordinator: Jacqueline Sanchez
Decom Coordinator: Ashlyn Hill
Project Manager: Kristina Burgess (Go Green Team)
Phone: 1-443-249-4126
Cell: 1-443-254-6057
Email: gogreen@installnet.com
PO #: site visit 2/9
PO Is Final: ☐
Start Date: 02/09/2023 - Firm
Ship Date: 02/20/2023 - Estimate
Deadline Date: 02/09/2023

[+] Customer Billing Address   Customer Contact
ARC303 - Arcadis (Highlands Ranch, CO)   ARC303 - Jodi Jacobs
[+] End User Installation Address   End User Contact
Arcadis (Irvine, CA)   Jodi Jacobs

Project Description / Special Instructions
Project Description:
Please see the pre-priced estimate form in the email log for the project description.
Special Instructions:

1. All tabs across the job page are functional, but used during different phases of the job:

· Project Administration tab -This tab includes:
o Project Manager contact information
o Customer information
o End User (Site) address and Point of Contact
o Project Description / Special Instructions
o Approximate distance from SP warehouse to end user
o Related Projects or Phases

· Pricing tab – This tab is where the SP will accept or adjust pricing.

· Attachments tab – This tab is where documents are housed that are important to the job.These documents may be uploaded by the customer, PM or SP. Documents housed here may include, but are not limited to:
o Bill of Materials (BOM)
o Floor Plans
o Prints / Drawings
o Assembly Instructions
o Typicals
o Sample COI
o Order Acknowledgements
o Delivery Tickets

Project Page Overview Cont.

 InstallTRAK / Shipping Info / Site Reqs – This tab is where the SP will update the InstallTRAK. This tab contains shipping information about product, along with additional requirements for the job.

· Emails – This tab logs all email correspondence between the PM and the SP, provided the emails were sent from the job. Outlook emails will not log here.

·Surveys – This tab contains the SP Survey as well as the PM Installnet Survey.

NOTE: Under the Project Administration tab, the SP can email the PM with any questions at any time. Those emails will be logged on the Email tab.

Submitting pricing to Installnet

1. SP will receive an email from an Installnet PM, requesting a quote.

Pre-Priced Estimate for InstallTRAK #316460, ECS Group - Lake Hopatcong,NJ

To

Message   PPEst_316460_022818_54_928.pdf (167 KB)

Dear John,

Attached are the Pre-Priced Estimate and supporting documents (if applicable) for InstallTRAK # 316460. It is our standard that pricing be returned back to the Project Manager within 24 hours, unless otherwise stated.

Please click the link above or below and log into our website to accept or adjust cost directly in the Pricing Tab. Other methods for returning the PPE are to print, adjust via Adobe Writer, scan/upload to the project or print/sign/upload or fax back. Email reply is also acceptable (please reiterate the pricing in the email body).

If you have questions or concerns, please contact the Project Manager as soon as possible and not later than 24 hours.

Click this direct link to access InstallTRAK # 316460

Thank you,

2. Once the SP is logged onto the Installnet website, enter the TRAK# (Installnet job #) in the "quick check" field in the blue menu bar on the left hand side, and click "GO". SP can search for this job by clicking the Estimate Status, which will open a list of all open estimates. Select the appropriate job to price.

Cont. Submitting pricing to Installnet

3. Scroll down the Project Administration tab to view End User information, Project Description and Special Instructions.

Cont. Submitting pricing to Installnet

4. Check the *Attachment* tab for any important documents uploaded to help accurately price the job.

5. Click the Pricing tab to accept or adjust the price as stated:
- Adjust the price by highlighting the stated price, backspace to remove, then enter SP price and click Update/Approve. That will date/time stamp the entry. The PM will get an instant email.
- The SP has the ability to add other appropriate costs, for example, local taxes.
- ·The SP can include their own control numbers as a cross reference.

Cont. Submitting pricing to Installnet

6. SP can also choose to scan/upload the signed PPE, or their formal company quote to the Attachments tab, choosing File Type <Pricing>
.

File Upload

- Browse to the files you wish to attach. The size of all files combined is limited to 100 megabytes.
- For best results when you have a large file, or are using a dialup connection, only send one document at a time.
- If you reach the internet through a firewall, your system may not permit the file upload. Please email your documents to InstallNET if this occurs.

File 1:   [Choose File] No file chosen
File 1 Type: [Choose One   ▼]
🍀 Additional Attachments

[Update/Approve]   [Will Not Bid]

Updating Installtrak Details:

1. Once the SP is logged onto the Installnet website, enter the TRAK# (Installnet job #) in the "quick check" on the blue menu bar on the left-hand side, and click "GO".

NOTE: SP can search for jobs by clicking the Firm/Start Scheduled, which will open a list of all open projects (NOTE: updates to InstallTRAK can be made when a job status is also Final Quote). Select the appropriate job to update.

Cont. Updating Installtrak Details

2. Click on the InstallTRAK / Shipping Info / Site Reqs tab

3. In the gray tool bar of the InstallTRAK section, click the [Add] button to the right. This will open the InstallTRAK:

Cont. Updating Installtrak Details

2. Click on the InstallTRAK / Shipping Info / Site Reqs tab

3. In the gray tool bar of the InstallTRAK section, click the [Add] button to the right. This will open the InstallTRAK:

Additional Information

Partial Product Received

- Within 24 hours of each receipt of product, InstallTRAK must be updated and all documents uploaded.
- In the date field, enter the actual day of receipt.
- Notes pertaining to product received should be specific, and packing slip/receivers, BOL and all other receiving documents MUST be scanned and uploaded to the TRAK (i.e., 1 HON cherry desk, 2 Office Star chairs. Packing slip attached).
- To attach receiving paperwork, scroll to the bottom of InstallTRAK, click the green   to open the attachment field. Browse to the file you want to attach. SP must also choose the appropriate File Type. Choose Receivers for uploading receiving paperwork. SP can upload additional receivers or photos in this area if necessary, by clicking the green .
- Click Update to save all InstallTRAK updates and any attachments.
- Use the Note field to mark the manufacturer's name of the receiving attachments.
- This process must be completed for all receivers within 24 hours of receipt of product.

Partial Product Received

☐ Check here if NOT labeled with InstallTRAK #

All Product Received

- Within 24 hours of the final product being received, the SP will update the InstallTRAK for All Product Received and upload all receiving documents.

All Product Received

☐ Check here if NOT labeled with InstallTRAK #

Confirm Start Date

- Within 72 hours of all product being received, the SP will contact the end user to set up the appointment.
- After speaking with the end user, enter the confirmed start date in the date field.
- Use the Note field to document who has spoken to and the date. If an estimated delivery time was provided, include that in the note. (i.e. Confirmed delivery with John Smith on 11/12/2017, between 8am – 10 am).
- If SP is unable to make contact with the end user, notate contact attempts in the Miscellaneous Notes field.

Confirmed Start Date
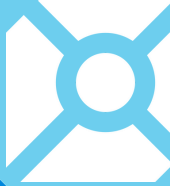
Cont. Additional Information

Job Complete

- Once the job is complete, update the InstallTRAK with the applicable job completion option ("Job Complete w/ Follow up" or "Job Complete 100%")
- Attach all pages of the Installnet signed work order, along with any other required paperwork, damage photos, or completion photos.

Job Complete w/ Follow-up
(Punchlist Sign-off)

Job Complete 100% - Final
Sign-off

Misc. Notes

- Use this area to notate End User contact attempts, site not ready, or other information that relates to product or status of this install.

Miscellaneous Notes

Additional Information about Installtrak:

- Do not forget to scroll and click Update for all InstallTRAK updates.
- When adding attachments to a job (receiver, pictures, signed work orders, etc.), please make sure the attachments are named accurately (manufacturer name, description of photo, etc.), and choose the appropriate file type in the File Type drop down box.
- InstallTRAK updates and attachments can be added during any job status (Estimate, Final Quote, Project).

File Upload

- Browse to the files you wish to attach. The size of all files combined is limited to 100 megabytes.
- For best results when you have a large file, or are using a dialup connection, only send one document at a time.
- If you reach the internet through a firewall, your system may not permit the file upload. Please mail or email your documents to InstallNET if this occurs.

Add Attachments

Update   Cancel

Cont. Additional Information
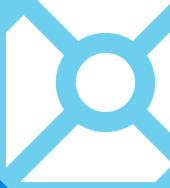
Printing PPE's, Purchase Orders and Work Orders:

1.When an SP is requested to price a job, the email will contain a .pdf attachment of the PPE. The email will also contain hyperlinks to all pertinent documents found on the Installnet website under the specific job. In addition, the SP can print a PPE from the Pricing tab, when a job is in Estimate or Final Quote status. All other documents will be housed under the Attachments tab.

2.Once Installnet has received approval from their customer, the SP will receive an automated email containing attachments of the Purchase Order, Work Order, all Attachments, and the Project page link to the website. SP can use these links to review all aspects of the job however, SP must be logged on the Installnet website to view the links in the email. The SP can print the Purchase Order and Work Order from the Pricing tab when the job is in Project status. All other documents will be housed under the Attachments tab.

3.After opening any document, you can easily print them by using your browser's print function.

4.The printed Installnet Work Order must be taken to the job site and signed by the end user and the installer. If the scope changes prior to installation, please be sure to the re-print Work Order to reflect the current description of work.

5. The printed Installnet Purchase Order should be retained for SP records and attached to the invoice to Installnet. SP should confirm that the billing amount matches the Purchase Order amount so there are no delays in processing the payment. A Purchase Order should **NEVER** be taken to the job site!

Service Provider Counseling & Discipline Policy

Service Provider Membership is based on the Service Provider Agreement which protects the interest of the Service Provider, Installnet and the proprietary network. The Agreement, which is signed by all member providers, requires the use of a standardized process which supports high quality installations and expects outstanding customer service.

Installnet has instituted a standard counseling process which emphasizes training and coaching to help service providers meet Installnet service standards and contract agreements which support the network's values. If counseling is not successful, a discipline policy has been established.

Service Standard Compliance

Service Providers are evaluated on each project completed with Installnet through our suvery system. Service Standard violations may be received via project surveys, End User feedback or Installnet project manager comments.

Service Standards include, but are not limited to:
- Quotes received back in 24 hours
- Updating InstallTRAK within 24 hours of when product is received
- Timely scheduling job within 72 hours of receipt of completed order (or confirm date if pre-arranged by Installnet Project Manager) and notify Installnet via InstallTRAK
- Real-time on-site communication of any issues or problems
- Notify Installnet of job completion and submit the Installnet Signed Work Order within 24 hours via InstallTRAK.
- Maintain a NPS Survey score no lower than 70%

Service Standard Violations Counseling Policy:
- The appropriate level of counseling and discipline will be determined based on the frequency, repetition or seriousness of the violation.
- Counseling generally falls into three levels:
    - 1st Level – Service Provider will receive an email and/or call to discuss the violations, review the standards and provide additional training.
    - 2nd Level – If Level 1 is not effective, Service Provider will receive a verbal warning and a written letter documenting the violation(s). Additional training will be required.
    - 3rd Level – If Level 2 is not effective, Service Provider will receive a written warning documenting the violation(s). The Service Provider will be required to submit a written service improvement plan to Installnet. This may result in probation and/or termination of Installnet membership.

Contractual Compliance

The Service Provider Agreement clearly explains responsibilities and expectations for a successful partnership between Service Providers and Installnet. The Agreement protects the interests of all Service Providers in the network.

In addition to standard clauses covering insurance requirements, indemnity and terms, the Service Provider Agreement has three clauses that form the foundation of our relationship with both our Client and our Service Providers.

- Non-Solicitation - Service Provider agrees not to approach, solicit business from or accept business from any Installnet Client, End User or another Installnet Service Provider directly.

- Non-Disclosure – Service Provider and Installnet agree not to disclose any of the proprietary information related to any pricing or service without the expressed consent for all parties.

- Non-Compete – Service Provider stipulates that they are a local furniture installation company and are not currently (nor will they in the future) engage in the development, ownership, partnership or management of another national installation network.

Installnet contractually commits to the same level of integrity with all Installnet Clients. Violation of these agreements not only undermines the Installnet Network and the inherent trust built between collaborative partners but causes Installnet to be in violation of our contracts with customers. The highest level of integrity is committed and expected, and violations of this trust will not be tolerated.

Contract Violations may be received via Service Provider Evaluations, Customer calls or Project Managers and include, but are not limited to:

- Quoting directly to an Installnet Customer or End User
- Providing a quote to or soliciting a quote from another Installnet Service Provider directly
- Discussing any pricing with an Installnet Customer or End User
- Joining any other national installation network
- Disclosure of any Installnet proprietary information, including Customer contacts, Service Provider contacts or any project information
- Establishing or partnering with an organization or process that competes with Installnet
- Failing to ratify new and updated addendums
- Providing a quote to a Customer for a job after providing Installnet with a quote for the same job (Service Provider must inform Installnet if bidding on the same project with another partner).

The Service Provider may be required to submit a written improvement plan to Installnet. This violation may result in probation and/or termination of Installnet membership.