# 1802: Automated Extra Service Log Report

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**Section:** Misc. Operations Reports
**Subject:** Automated Extra Service Log Report
**Approved by:** Eddie Faircloth
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**Policy Owner:**

## Policy

At Massey Services, we are committed to "Above All, Total Customer Satisfaction!"

In an effort to build total customer satisfaction and long-term trusting relationships by improving response times and reducing the chances for customer service requests to be lost, we are implementing the following Automated Extra Service Log/Report.

This policy applies to ALL services: Pest Prevention, "Four Seasons" Pest Prevention, GreenUP Lawn Care, GreenUP Tree/Shrub Care, Termite Protection (including Baiting), Termite Renewals and Re-inspections. All extra service calls to Service Centers will be recorded, tracked to completion and finalized in accordance with this policy.

The Automated Extra Service Log/Report (See Exhibit G) which is referred to as Special Services in Routeman's Main Menu #8, is a tool to be used by the General Manager and Service Manager to help provide management control and follow-up on ALL complaints or extra service calls. By reviewing the "Log" daily, the General Manager and Service Manager can make sure all calls are being handled promptly and properly. All calls for extra service must be responded to the same day received and resolved within 48 hours (PrevenTech calls will be resolved within 24 hours) or at the convenience of the customer.

The following procedures are to be used in maintaining the automated Complaint Log:

## Administrative Responsibility

1. All extra service calls (Service, Sales, Administration) regardless if received by telephone, mail, etc., are recorded in the Automated Extra Service Log (Routeman Special Service Main Menu #8) everyday.
2. Once information is entered (the date received, customer name, telephone number and what the customer needs) on the customer's account, print a copy of the screen. This replaces our current manual message system. (See Exhibit D)
3. Page the technician/specialist immediately with the extra service information, and place printout (Extra Service Sheet) in the technician's message box. The first (1st) extra service request on any customer will be dispatched to the appropriate Service Technician/Specialist.
4. Any second (2nd) extra service request on the same customer is to be brought to the attention of the Service Manager the same day received. Any third (3rd) extra service request on the same customer is to be brought to the attention of the General Manager the same day received.
5. At the end of each day, Administrative Staff must print the Extra Service Invoices.
6. After the Extra Service Invoices are printed, the Administrative Staff MUST run the Extra Service Log/Report (See Exhibit G) and place it on the Service Manager's desk to be used at check-in time with all Service Technicians/Specialists.
7. Within forty-eight (48) (24 hours for Preventech) hours following the resolution of the extra service, the Administration must place a call to the customer as a follow up to ensure complete customer satisfaction. Once this is accomplished, return to Special Services Menu, File Maintenance Option, and modify field #2, SALESMAN and type in 90. (When you run the complaint report, accounts with 90 will denote that they have been contacted.)
8. At the end of the month, during pre-close the office manager must run the service center extra service report #32 from custom menu #2 for the entire month, and place it in a binder for reference (see exhibit K). This report will pull all open and complete extra services for the current month only.

## Service Technician/Specialist Responsibilities

1. All complaint/extra service calls must be responded to the same day as received. All extra service calls must be resolved within 48 hours (24 hours for Preventech) or at customer's convenience.

2. Service Technicians/Specialists MUST turn in an invoice for EVERY extra service call, along with their Daily Service Report.

## Service Manager Responsibilities

1. Follow-up to see that the first (1st) extra service request on any customer is dispatched to the appropriate Service Technician/Specialist.
2. Any second (2nd) extra service request on the same customer within a thirty-day period will be assigned to the appropriate Service Manager to personally contact, visit and resolve. This process should also involve the Service Technician/Specialist so that we continue to educate, teach, and develop technicians.
3. The Service Manager will use the Special Services Complaint Report in his daily check-ins/accountability session every day. The Service Manager will verify each first (1st) extra service call was responded to by the appropriate Service Technician/Specialist and an appointment has been scheduled within 24 hours or at the convenience of the customer.
4. On completion of the daily check-in/accountability session, the Service Manager will place the extra service log on the General Manager's desk for follow-up on any other issues that require the General Manager's attention.
5. All extra services involving termite treatments, claims or refunds must be reviewed by the General Manager to ensure a prompt, immediate resolution to the customer's complete satisfaction.

## General Manager Responsibilities

1. Any third (3rd) extra service request on the same customer within a thirty-day period will be flagged and brought to the General Manager's attention immediately. The General Manager will personally review and get involved to resolve any perceived concern to our customer.
2. Follow-up daily on all extra service calls received by the Service Center to see that all of these calls were handled.
   A personal contact and inspection must be made on all extra service calls that involve termite damage.

This policy requires everyone's effort and commitment. When this policy, procedure and philosophy is embraced and implemented, problems can be recognized before they lead to dissatisfied customers

and ultimately cancelled accounts.

## Procedure for Handling Customer Complaints/Issues in Computer

1. While customer is on the phone, or from correspondence or other communication, proceed to Main Menu #8, Special Service screen. (See Exhibit A)
2. Type #01 for Special Service Maintenance. (See Exhibit B)
3. Choose Entry Mode Option "F2" for Service M/C/O. (See Exhibit C)
4. Type in customer's account number. If you do not have an account number you can do an account lookup by pressing F5.
5. In field #1, PROBLEM DATE, type in current date. (See Exhibit D)
6. Press Enter to PROBLEM CODE and type in "2" for a service complaint. (If you have a customer who requires a follow-up to an already rendered service, i.e. carpenter ant follow-up, Initial Service follow-up, a
7. One Time Special Service follow-up, you will need to use code "3".
8. Press Enter for PROBLEM DESC. field and type in nature of problem, i.e. Carpenter Ants, Dollar Weeds, Inspection Call-Back, etc. (NOTE: This description will print on worksheets, service slips, on notes section, and automatically transfer to the description field during posting.)
9. At field #2 bypass default ORIG. ROUTE and press enter to ACCOUNT TYPE the code here will be "Z" for no-charge pest and lawn services, "7" for no-charge sub, and "8" for no-charge fume.
10. At SCHED. ROUTE type in route that will respond to service issues.
11. Enter to SALESMAN # and space through to delete any salesman # showing.
12. If you currently schedule for your technicians, type in the scheduled date of service, if not, leave blank.
13. At INVOICE TYPE type in according to service, i.e. 0=Pest, 1=Commercial, 2=Lawn & T/S, and 4=Termite. (The first extra service on a termite account will always be a PROTOCOL, unless the customer is requesting an inside inspection. Once the Manager has done the Protocol, he/she will instruct Administration as to whether or not retreatment needs to be scheduled and created in the Extra Service Log.)

14. Bypass through SCHED. TIME field, and at MINUTES type in corresponding Pest Code if available. (See Exhibit F) If you do not know or have the proper code, Service Technician will have this code on his Service Invoice. Make sure you enter this code in the MINUTES field of the posting screen, and after posting you must return to Special Service Maintenance and enter Pest Code in the MINUTES field here as well.
15. At the BILLING AMT. field make sure you change the service amount to ZERO.
16. At BILLING CODE hit enter to bypass.
17. At field #4, DETAIL ONE type in description of specific problem. This is a twenty-character field, so if your description does not fit, continue on DETAIL TWO.
18. You can now print the screen so you have information with which to page Service Technician. (This Service Complaint replaces the manual call slip and can be placed in the Service Technician's message box.)
19. When you accept the entry the computer system will automatically log a Customer Complaint (CC) in the notes sections. However, in order to maintain more detailed notes, you may now press F6 and enter specific details pertaining to this call. (See Exhibit E)
20. At this point you can press "A" to accept your entry, "R" to reject, or "M" to modify. DO NOT CHOOSE "C" TO CREATE, as it is only used when there are other complaint calls already in the system and you need to "create" a new entry.
    - At the end of each day, Service Center Administration must run from the Special Services menu (#08), Special Service Route Sheets & Service Slips (#02). These will be put in the assigned technicians message box.
    - After the Special Service Route Sheets & Service Slips are done, Service Center Administration must run from the Special Services menu (#08), the Service Missed/Complaint Report (#05). (See Exhibit G) One copy should be placed in the Service Technician's message box, and one on the Service Manager's desk or message box.

## How to Post the Special Services

1. From Main Menu choose item #3, Daily Posting Scheduling.
2. From Posting & Scheduling screen, choose #04 for Service Schedule Posting.
3. You are now at the Automatic Service Posting Program (See Exhibit H).

4. Type in your Service Center Number.
5. Type in Batch Number. This number should start with Service Center Prefix, i.e. 01 for North Orlando. Next type a "0" for Pest, "2" for Lawn, etc., and the "day" for the day the work was done. Example: 01028 > 01=North Orlando, 0=Pest, & 28=28th day of the month or day service was done.
6. At both Route Number fields, type in the three-digit man number.
7. At Date Serviced, type in date service was actually done, 02/28/00.
8. At Date Scheduled, type in the month of the service, 00 for the day, and the year, i.e. 02/00/00.
9. Press enter to proceed to the posting screen.
10. Type in account number.
11. PRESS "F3" to view all outstanding services and arrow down to the Invoice Number Service Technician has completed. (See Exhibit I)
12. When you hit enter, all remaining fields in the posting screen will automatically fill in. (See Exhibit J) NOTE: If the Pest Code used to create a complaint call is different from what the Service Person reports/records on the service invoice (refer to item A-13), you need to arrow-down to minutes field to type in the correct Pest Code. Once posting has been completed you will also need to return to the original complaint call and modify the Pest Code filed.
13. Enter the Payment line and replace the "Y" with an "N" for no-payment.
14. Enter to option line and type "A" or press enter to accept.
15. Once all posting is completed, F9 to print the Batch sheet, review entries for accuracy.
16. If all looks well, type "A" to accept the batch, if not, press "M" to modify and make necessary changes.
17. At this point the computer will automatically mark accounts posted as SERVICED and close them on the Service Missed and Complaints Report.

In order for this program to be a complete success, everyone must adhere to it. Consider the many advantages to having a computer automated Complaint Log.

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