1903: Termite

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Section: Filing
Subject: Termite
Approved by: David Armstrong
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Policy Owner:

Policy

To maintain an orderly and efficient system for storing Termite customer records of a Service Center, the following procedure is to be followed.

1. ACTIVE ACCOUNTS FILE (SET UP)
    1. Print Renewal Master List by month (Custom Menu #21).
    2. Verify Master List to Active Files.
        1. Pull all files not on the list. Set up by street address.
        2. If there is a "dummy" file in Active Files, using a red pen place a (D) on printout by customer name.
        3. If there is no file in Active Files, using a red pen place an (X) on printout by customer name.
        4. If name is on the list twice:
            1. Make sure there are two folders and two types of service or two different properties serviced.
            2. If only one account, cancel the duplicate account.

    3. Upon completion, take all files removed per (B1) above and
        1. Merge by street address into cancelled files.

2. Using Master List, check for all accounts marked with a (D-#2, above) and (X-#3, above).
3. If the file is found , place it into Active File in sequence, replacing the "dummy" file when applicable.
4. If the file is not found, place a "dummy" file in proper sequence.
5. Prepare a list in alphabetical order of all accounts with a "dummy" file and place it in a folder in front of file (before "A"). Update when or if files are
6. found.
7. Special Service (One Time contracts) are to be filed January through December, A to Z in front of Active Files.

2. ACTIVE ACCOUNT FILES (MAINTENANCE)
    1. When a Termite account is sold and entered into the computer:
        1. Prepare folder, label tab of folder with name, address, phone number, date and amount of contract.
        2. Place the folder in front of a file drawer section (SOLD NOT COMPLETED) with office copy of contract, graph, and specs.
        3. When the account is completed and charges entered into the computer and information entered on Termite Commission Log, pull file from (SOLD NOT COMPLETED) section and
            1. Place Service copy in file.
            2. If paid, place the file in sequence in the CURRENT MONTH COMPLETIONS section.
            3. On the first work day of the month, using the Termite Commission Report, or computer, remove all account files paid in full (-0- balance) and place in active files in sequence, by month completed.
            4. Any accounts with a balance are to be filed in section (COMPLETED PRIOR MONTH-NOT-PAID).
                1. On the first work day of the month, check all accounts for balance. When accounts reach a -0- balance, place in Active Files in sequence by month completed.
                2. If not paid, prepare a list for General Manager follow-up.

1. Return file to (COMPLETED PRIOR MONTH-NOT-PAID) section for monthly follow-up.
2. When paid, place it in an Active File.

4. When an account requests cancellation and after entered on CANCELLATION LOG, Active File is removed and
    1. Attached to CANCELLATION REQUEST.
    2. Immediately given to the Service Manager or General Manager.
    3. Manager to contact that work day.
    4. If the account is saved, notate on CANCELLATION LOG and re-file folder.
    5. If account is lost, notate on CANCELLATION LOG, and
        1. Enter into computer
        2. Enter on LOST BUSINESS LOG, if applicable
        3. Split cancellation request.

3. CANCELLATION FILES
    1. When account cancels:
        1. Place folder in Cancelled File, by street address, A to Z.

4. PRETREAT ACCOUNTS FILING

    Prepare the hard copy of the customer's Pretreat File as follows:
    1. When a pretreatment job is sold, a file folder is created in the same manner as a post-construction treatment. Instead of using a manila file folder to create the file, a red file folder should be used for ALL PRETREATS, filed in termite files (SOLD NOT COMPLETED) section.
    2. Upon completion, remove the folder from the (SOLD NOT COMPLETED) section of the file cabinet.
        1. Enter charges on the computer.
        2. Place the service copy in the folder.
        3. File in (CURRENT MONTH COMPLETIONS) section.

3. Upon receipt of payment remove folder from (CURRENT MONTH COMPLETIONS) section of file cabinet.
4. Place the customer file folder (red) in a separate file drawer labeled PRETREATS--alphabetical/January-December sequence in the appropriate month of completion.
5. The completed file folder should contain the Wood Destroying Organisms Agreement, the Wood Destroying Organism Graph, the Termite Treatment Specifications, the Completion Record, and a (blank original) Six Point Total Protection Subterranean Termite Guarantee. This guarantee will remain in the file (blank) until the following steps are completed.
    1. Home owner's name obtained.
    2. Home owner's billing address.
    3. Property treated (street) address.
    4. Home and business phone number.
    5. Any other necessary information.
    6. A scheduled appointment with the (new) home owner is confirmed.
6. Upon completion of (A-F) above, an Account Record Change must be prepared with all corrected information. This information is entered into the computer, tab changed on folder, and Guarantee typed. The Account Record Changed with a copy of Guarantee then must be placed in the original file folder.
7. The Termite Bookkeeper prepares a customer file folder with the following forms taken from the Service Center file folder (red).
    1. Customer Copy of Service Order.
    2. Customer Copy of all Service Invoices.
    3. Customer Copy of Subterranean Treating Specifications.
    4. Floor plan for model # (used as graph).
    5. Original Guarantee.
    6. Copy of Issued 2052.
    7. Two copies of Subterranean Termite Guarantee Protection Comparison.
8. The Termite Bookkeeper will then enter the customer's name and information on the Completed Pretreat Lead Log page in the Lead Log binder.

9. General Manager's Responsibility:
    1. Assign customer file for scheduling appointment.
    2. Enter appointment date and time in Lead Log.
    3. Assure that the customer file is delivered.
    4. Assure that treatment is explained.
    5. Assure that Form 2052 Guarantee is explained.
    6. Assure that Massey Six Point Total Protection Subterranean Guarantee is explained.
    7. Assure that customer signs Guarantee Comparison verifying that E and F (above) was performed.
    8. Assure that Premium Pest Prevention Service was proposed.
    9. Assure that GreenUp Lawn Service was proposed.
    10. Assure that proposal information/date-amount proposed/sold and call back dates are entered in Lead Log.
    11. Assure that Guarantee Comparison is delivered to the Termite Bookkeeper to be placed in the Service Center file (red).
    12. File Folder is then placed in Service Center Termite Active Files, proper month, A-Z.

5. 1145 ACCOUNT FILE
    1. Prepare the Service Center Copy of the completed 1145 file as follows:
        1. Completed, handwritten, 1145.
        2. Completed, typed, 1145.
        3. Graph (two copies).
        4. Second and third copy of statement (for use if necessary).
    2. Place items listed in #1, above, in the red file folder.
    3. Place folder in 1145 COMPLETED NOT PAID section of file cabinet.
    4. Upon receipt of payment, remove the file folder from 1145 COMPLETED NOT PAID section and assign it to the Sales Manager to ensure that sale is entered on Inspector's DAR and Sales Recap.

5. Sales Manager returns file, along with other contracts reported as sales to Administrative Clerk preparing DOR.
6. After completing all posting of the 1145 account per Policy and Procedure #804, attach the Office copy (blue) with graph and the Customer's copy (white) to the Guarantee to 1145. Put both copies in the red file folder.
7. File customer account folder (red) in separate file drawer labeled WDO inspections in alphabetical/January-December sequence in appropriate month of inspection.
8. Thirty days in advance of the anniversary date (original month of inspection) all customer account files will be pulled and customer's name, address and phone number recorded in WDO Lead Log and assigned to the Sales Inspector.

6. REINSPECTIONS NOT PERFORMED FILE
    1. Set up a Reinspections Not Performed file using:
        1. Hanging file rack with hanging files.
        2. Tab files with zip code which is Grid Code on Reinspection Invoices.
        3. Inside each hanging file, place three manila file folders tabbed with Zip Code and labeled as:
            1. Prior Month.
            2. Current Month.
            3. Next Month.

    2. Assure that Reinspection Invoices are logged out to reduce the number that will have to be re-typed due to loss.

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