



RFI

RF INSTALLATIONS L.L.C.

Home Depot Store Guide - Millworks

Home Depot Store Guide





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*** Soft Copy (PDF) of Store Binders – can be found online by visiting www.rfinstallations.com ***
On the login page, click on the link named **“Home Depot Store Guide”**



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Job Types / Contacting RFI

RF Installations assigns Job Type Codes to PO's when they are entered into our system to help keep the PO's organized on our side. Below is a list of Job Type Codes that you will see when referencing our system, along with a description of what they are.

<u>Measure Job Type</u>	<u>Description</u>	<u>Install Job Type</u>	<u>Description</u>
MSTM	Storm Door Measure	STMD	Storm Door
MSEC	Security Door Measure	PSTMD	Permit Required STMD
MEXT	Exterior Door Measure	SECD	Security Door
MPAT	Patio Door Measure	EXDR	Exterior Door Install
MINT	Interior Door Measure	PEXDR	Permit Required EXDR
MBARN	Barn Door Measure	PTDR	Patio Door Install
MKCTI	Kitchen Measure	PPTDR	Permit Required PTDR
MWND	Window Measure	INTD	Interior Door Install
MWDT	Window Treatment Measure	BARN	Barn Door Install
		CABI	Cabinet Install
		KCTI	Kitchen Install
<u>Other Job Type</u>	<u>Description</u>	PKCTI	Permit Required KCTI
PRMT	Permit Fees	WNDI	Window Install
ENGR	Engineer Fees	PWNDI	Permit Required WNDI
TRIP	Trip Charge	WNDT	Window Treatment Install
CBEXT	Charge Back External		

Faxing/Emailing RFI

- To fax documents to RFI please use 866-577-1250
- To email documents to RFI, please send to documents@rfinstallations.com

Chargebacks

- Send all chargeback requests to chargebacks@rfinstallations.com or via fax: 817-704-4543
- We process all chargeback paperwork for all installers and post approval numbers or denials in Infor CRM.
- If you have any questions, please contact your RFI Field Manager.
- Please remember to check the notes in Infor CRM for all updates/notification numbers. All chargebacks will be completed within 14 days of receipt by RFI.



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Measure Process / Selling the Install

Measure Process

Adding as much detailed information to measure requests will help ensure that the installer is collecting all of the measurements needed for the specific install.

- Put as much information on the measure PO as possible. If the customer is interested in a stock wood, fiberglass or steel door, etc., make a note in the comment section of the measure PO this will give the measurer the information needed to give you a complete measure.
- Set expectations for the customer on time frames, the measurer will contact the customer within 48 hour (business hours) after receiving the measure PO.
- The status of the measure can be found in the notes of the system (both HD System and Infor CRM).
- Within 48 business hours of the measure being completed; a copy of the completed measure form can be found in the DVR and in Infor CRM.

Selling The Install

- Review completed measure form.
- Verify customer's product selection will match the existing information as listed on the form. Size, Swing/Handing/Jamb size need to all be checked carefully.
- Note: * Unit size is not the same as Rough Opening *
- Store should order the door in accordance with the measurements and specifications documented on the Installer's measurement sheet(s).
- If you are going to need to order something other than the size stated on the measure, **make sure that you call us first**. We can work together to get the customer the right product for their application.
- Note: * Custom labor, additional optional labor items, and/or different trim or support materials may be needed when modifying opening to accept different size door *
- Ensure that all support materials are added to customer's order.
- Choose all labor options listed. Some of the labor needed is part of optional labor in your spec, and others will need to be entered as custom labor.
- Permits - those installs requiring a permit must have a separate/additional PO for the permit fee, it is not to be included on original install PO. Just add the labor SKU in again on your quote, and add the permit fee to the new labor line.

Measure Forms - The measure form that your RFI installer completes will have everything detailed that the store will need to sell the product and install labor. If you have any questions about the information on this form, make sure you contact the measurer for clarification prior to ordering any product.

The measure form includes the following information:

(1) Customer Name, Store #, Date of Measure, Measure PO#, and the door count.

(2) Measurer's name and phone #.

(3) Door Location, Direction the door faces, the year the home was built, Lead Test Results, and RRP Fees (if applicable).

(4) This section is where you will find all of the unit-specific measurements. This includes:

- Measurement Type - i.e. Rough Opening, Unit Size, Storm Door Opening, etc.
- Width and Height of measurement
- Jamb Depth & Slab Thickness
- Lock Prep count and Backset Depth
- Handing Codes - Refer to the drawing in the middle of the page

the middle of the page

(5) The Notes section is where you will find detailed information about the condition of the house, obstructions, etc.

(6) Photos - There should always be an Exterior Overview and Interior Overview photo on every measure. There should also be a photo of anything that is a potential concern for the install.

(7) Customer-Provided materials needed for the install are in this section.

(8) Basic and custom labor needed for the install are in this section.

(9) This section will auto populate based on the information entered at the top of the form.

Please note: Measurements on this form are final. If revisions are needed, they must be requested through your RFI Installer.

Home Improvement Agreement: Door Measure Form

Please upload this document in InstallConnect (ICON) to be viewed in the DVR. DO NOT FAX OR EMAIL THIS DOCUMENT

Customer Name

Store #

Date of Measure

Measure PO#

OF

Door Count

COMPANY / INSTALLER	MEASURER PHONE #	ENERGY CODE YEAR	YEAR BUILT	LEAD RESULTS	EPA Pamphlet Given To Customer	PERMIT REQ TDI REQ	PERMIT COST TDI COST
---------------------	------------------	------------------	------------	--------------	--------------------------------	--------------------	----------------------

MEASUREMENT TYPE: Select One:		DOOR LOCATION: Select One:		HANDING	DOOR FACING (N-S-E-W)	OVERHANG	EXTERIOR	LEAD POSITIVE FEES
WIDTH	HEIGHT	JAMB	THICKNESS	SWING	STOCK OR S/O	Select One:		
LOCK PREP	BACKSET	SILL DEPTH	SILL SUPP.	BLDG CODE	DEADBOLT	LOCKSET	TOP H	2nd H
							3rd H	4th H
							Size	Radius
							Edge Prep	

Existing Door Type:	Existing Condition of Door:	Water Damage Noticed:	Sill Pan Recommended:
---------------------	-----------------------------	-----------------------	-----------------------

A	B	E	O	J	L	Notes: (5)
Single	Double	Slider	Storm			
C	D	G	H	K	M	

N - EXTERIOR VIEW PHOTO (6)	INTERIOR VIEW PHOTO	ADDITIONAL PHOTO
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CUSTOMER PROVIDED MATERIALS				BASIC / CUSTOM LABOR ADDITION TO SPECS				ADD. FEES (FROM ABOVE)	
QTY	SKU	SKU DESCRIPTION	PREFIN	QTY	DESCRIPTION (Cover with the Customer)	RETAIL		LEAD POSITIVE FEES	
(7)			<input type="checkbox"/>	(8)				PERMIT FEES	
			<input type="checkbox"/>						
			<input type="checkbox"/>						
			<input type="checkbox"/>						
			<input type="checkbox"/>						
			<input type="checkbox"/>						
			<input type="checkbox"/>						
			<input type="checkbox"/>						
			<input type="checkbox"/>						
			<input type="checkbox"/>						
			<input type="checkbox"/>						

		Additional Photos available: <input type="radio"/> Yes <input type="radio"/> No
--	--	---

		(9)
--	--	------------

Clear Form

Measurements on this form are final. If revisions are needed, they must be requested through your installer.



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Common Custom Labor Charges

Build In/down Fee: When the door opening is larger than the width of the replacement Entry/Patio Door. The installer closes in the opening of the door by adding strips of wood around the perimeter to ensure proper fit of the new door unit.

Before



After



Threshold build up or Subsill replacement: When the sub flooring is rotted under the threshold or not high enough to support the threshold.



Cut Flooring Back: This occurs when the door being installed overlaps the finished floor. In order to install the door the floor must be cut back to allow the new door threshold to sit down on the sub flooring and butt up to the finished flooring. (DOES NOT INCLUDE TILE)



Exterior Door Build out for Storm Doors: This is needed when the jamb of the existing door isn't either wide enough to support the addition of a storm door or deep enough so the entry and storm handles will not hit when closed, the installer adds Pressure treated wood to or a never rot product to create a level mounting depth across the entire width of the frame to match the existing exterior siding/brick. Up to 2"

Before



After



Replace Rotten Brickmould for Storm door: When there is rot to the door jamb or surrounding trim that needs to be replaced for Storm Door installation. (Important note -this is for non-structural repairs only)
(Replace Brick Moulding only)



Sill Supports: Sill supports are required by the door manufacturer's install specifications and their purpose should be explained to the customer. The reason for a sill support is to keep the sill or threshold from flexing when someone stands on it. When the sill or threshold protrudes past the existing sub floor, the threshold can flex causing damage to the product. *** Application and products vary by Location ***

Examples of Unsupported Thresholds / Sills





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Sold Install Process

Once Install Quote is Sold

RFI will electronically receive the purchase order and it will be loaded the Infor CRM system.

- **Stock Doors**
 - Customer will be contacted within 48 hours (business) to schedule.
 - Please make sure stock merchandise is in stock. Check all merchandise for damage, color, handing and size. This eliminates trips changes, busted jobs and most importantly disappointed customers on their scheduled day of install.
- **Special Order Doors**
 - All special order products will be placed in "special order" status until the ETA noted on the installation PO.
 - No special order PO's will be scheduled until the store has placed a note in the installation PO confirming that all product has been received and the installation is ready to schedule.
 - Customer will be contacted within 48 business hours of notification of special order received in Infor CRM.
 - Please check-in all Special Order Merchandise at the time it is received . Check all merchandise for damage, color, handing and size, and add a copy of original measure with HD associates signature. These things eliminates trips changes, busted jobs and most importantly disappointed customers on their scheduled day of install.

Day of Install

- **Store Merchandise Pick Up:**
 - Installer arrives at the Store to pick up the merchandise that has been pulled and is staged for pick-up.
 - Installer inspects merchandise.
 - If merchandise is acceptable, installer takes merchandise to customer's home for installation.
 - If merchandise is not installable, damaged or does not meet customer standards, the job is busted (TRIP).
- **On Site:**
 - Installer will confirm with the customer that they approve of all product prior to installation. If merchandise is not installable, damaged or does not meet customer standards, the job is busted (TRIP).
 - Installer will explain the work to be performed and answer any questions.
 - If unforeseen conditions (Termite Damage or Rotted Joists) are found upon removal of existing door; it may be that the scope of repairs needed are not allowable under the HD Installation program. In those cases the installer the installer will secure the opening and the customer will need to have repairs completed before Installation can take place. Job is now busted (TRIP)
 - Upon completion of installation, the Installer will clean the work area of debris.
 - Installer will walk the customer through final inspection of the installation. If the customer has paid an additional haul-away fee, the Installer will also haul away all previously installed door(s) and frame(s) to be disposed of.
 - When the customer is happy and has no concerns installer will obtain signature for the CA.

Post Installation

- If you or the customer have any questions or concerns after the install, please contact your RFI Field Manager.
- RFI will key rec all measures and installs.



Lead-Based Paint Renovation, Repair and Painting Program (RRP)

The Lead-Based Paint Renovation, Repair and Painting Program is a federal regulatory program affecting contractors, property managers, and others who disturb painted surfaces.

- It applies to residential houses, apartments, and child-occupied facilities such as schools and day-care centers built before 1978.
- It includes per-renovation education requirements as well as training, certification, and work practice requirements.
- Pre-renovation education requirements:
 - Contractors, property managers, and others who perform renovations for compensation
 - In residential houses, apartments, and child-occupied facilities built before 1978 are required to distribute a lead pamphlet before starting renovation work.
- Training, certification, and work practice requirements:
 - Firms are required to be certified, their employees must be trained (either as a certified renovator or on-the-job by a certified renovator) in use of lead-safe work practices, and lead-safe work practices that minimize occupants' exposure to lead hazards must be followed.
 - Renovation is broadly defined as any activity that disturbs painted surfaces and includes most repair, remodeling, and maintenance activities, including window replacement.

RRP Requirements - National Vs Individual State

- The EPA allows other entities (state and local governments) to regulate and enforce their own RRP programs as long as it is approved by the EPA. At this time, these states include:
 - Wisconsin, Iowa, North Carolina, California, Kansas, Mississippi, Rhode Island, Utah, Oregon and Massachusetts.
- State guidelines must be at least as stringent as Federal rules. Most states' policies match that of the EPA and are focused mainly on collecting fees.
- California and Kansas, however, require that target housing be assumed contaminated and RRP rules are automatically applied.

The EPA requires all remodelers to practice Lead Safe Practices on all homes that were built pre-1978. Lead based paint was no longer used after 1977 due to the health risks of lead. This includes any product that is being replaced, such as interior doors and exterior doors, but does not apply to the addition of storm doors to an existing opening. Below is the process that RFI follows, as well as the expectations from the store associates.

1. Store associates should ask homeowners what year their home was built during the per-qualification process. If the homeowner indicates that their home was built pre-1978, they should inform the homeowner that there will be a lead test performed during the measure to determine if EPA Lead Safe Practices will need to be performed.
2. During the measure, the installer will test a portion of the jamb of the door being replaced to determine if lead based paint is present. The results of the test will be indicated on the measure form.
3. If the Lead Test Results are indicated as Positive on the measure, then the Store Associate will be required to add the appropriate Lead Safe Removal Fees to the installation. Installers will not be adding the labor cost to the measure. These fees can be found on the Custom Labor Price Sheet that has been given to all stores.
4. To add Lead Safe Removal Fees to the install, the Store Associate will select the Lead Safe Work Practices as the line item. This line item shows a retail cost of \$1.00. The Store Associate must enter the quantity of the total fee for this to calculate properly. These must not be added as a Custom Labor Line. ****Note - if the store does not add the fee to the install, they will be responsible for issuing a paying PO for the fees.**
5. On the day of the install, the installer will follow all Lead Safe Practices. The photos below show what is involved during an install that tested positive for lead based paint.

If you have any questions on a measure, please contact the installer or RFI Field Manager prior to selling the install.





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Common Door & Window Terms

A

Active Door: In a double-door unit, this is the one that will be used as the primary entrance. This door will also contain the operational handleset. The inactive door uses a “dummy” handle.

Adjustable Threshold: A threshold that may be adjusted up or down in order to customize a doors seal for different types of weather or humidity.

Argon gas: Argon is a safe, odorless, colorless, non-toxic, non-flammable inert gas that is commonly used in place of air between the glass panes of an insulated Low-E glass unit to reduce temperature transfer.

Astragal: See T-Astragal.

Awning window: A window unit in which the bottom of the sash swings outward.

B

Backset: A measure of the horizontal distance from a lock face to the center of the keyhole or cylinder. Measured from the center of the lock edge for a beveled front, and from the lower step of the lock face for a rabbeted front.

Bay window: A composite of three windows, usually made up of a large center unit and two flanking units at 30-,45- or 90- degree angles to the wall.

Bevel of Door: The angle of a door’s edge to the outer surface of its stile. The typical bevel is 1/8” in 2”.

Block frame window: Used when replacing the wood sash of an old double hung wood window.

Bore: The single bore or double bore holes for handset and lockset.

Bored Lock: A tubular or cylindrical lock placed into a door via a bored opening.

Bow window: A composite of four or more window units in a radial or bow formation.

Brickmould: A mould around the outside of a door’s frame. Used for decorative purposes.

C

Came: A metal strip, typically made of zinc or brass, which is used to hold pieces of glass in place. Used for more decorative designs.

Casement window: A window unit in which the single sash cranks outward, to the right or left.

Casing: A decorative wood paneling attached to the interior edge of a window or door frame. Covers the gap where the door frame meets the wall.

Check rail: On a double-hung window, the bottom rail of the upper sash and the upper rail of the lower sash, where the lock is mounted.

Circlehead: A generic term referring to any of a variety of window units with one or more curved frame members, often used over another window or door opening.

Cladding: Any material locked to the outside faces of doors and windows to provide a durable, low-maintenance exterior surface.

Clerestory window: A venting or fixed window above other windows or doors on an upper outside wall of a room.



Cottage double-hung: A double-hung window in which the upper sash is shorter than the lower sash.

Cylinder: Contains the tumbler and keyhole of a lock. This is the part of the lock into which the key is fit.

D

Decorative Glass: Glass which has been formed or arranged into structure or patterns for ornamental and decorative applications. Beveled glass, camed glass, and blown glass are a few examples.

Door Panel: The leaves of the full door, attached to the frame.

Door Stop: The part of the frame upon which the door panel rests when closed.

Dormer: A space which protrudes from the roof of a house, usually including one or more windows.

Double-Acting Door: Door which is hinged in such a way that it may be swung open both inward and outward.

Double-hung window: A window unit that has two operable sashes which move vertically in the frame.

Double Bore: Two holes drilled in the door, one for a handset and one for a lockset.

Double or dual glazing: Use of two panes of glass in a window to increase energy efficiency and provide other performance benefits.

Drip cap: A molding placed on the top of the head brickmold or casing of a window frame.

E

Extrusion: A form produced by forcing material through a die. Most window frames are clad with extruded vinyl or aluminum.

F

Fenestration: An architectural term referring to the arrangement of windows in a wall. From the Latin word, "fenestra," meaning window.

Fixed window: Non-venting or non-operable window. Also known as picture window.

Flashing: A thin strip of metal or synthetic material that diverts water away from a window or skylight.

Flush Bolt: A bolt that is flush with the face or edge of the door when retracted.

Flush Fin: A replacement window with flush fin is used when replacing an existing aluminum sliding window. This is the most commonly used replacement window type.

Foam Spacer: Foam material placed in the airspace of the insulating glass in a window to enhance the appearance and improve the performance of the window.

Frame (Also See Jamb): The surrounding edge of the door or window to which the door panel or window sash is attached. Includes the head, sill and jambs of the door or window.

French Door: A door whose panel consists of glass panes throughout its length surrounded by narrow stiles.

G

Glazing: Glass in a window or door; the act or process of fitting with glass.

Glazing bead: A plastic or wood strip applied to the window sash around the perimeter of the glass.

Glazing stop: The part of the sash or door panel which holds the glass in place.



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Common Door & Window Terms

Glass Pane: In the window shown at right there are two panes of glass, one in the top sash and one in the bottom sash.

Grille: A term referring to windowpane dividers or muntins, usually a type of assembly which may be detached for cleaning.

H

Hand (Door Handing): Which direction the door or window opens. Many companies have different techniques but we have narrowed it down to the two simplest ways. First if the door or window swings clockwise it is a right hand. Second if the door or window swings counter-clockwise it is a left hand. The other way to determine the swing of your door is to stand on the side where the hinge pins are showing. First if the hinge pins are on the right side and handle on the left you have a LEFT HAND. Second if the hinge pins are on the left side and the handle is on the right you have a RIGHT HAND.

Head: The horizontal section of the jamb that tops the door frame.

Head Jamb (window): Groove at the top of the window which allows the window sashes to slide into place and seat inside the window frame.

Header: A horizontal framing member placed over the rough opening of a window to prevent the weight of wall or roof from resting on the window frame.

Hinges: The plates and pins used to attach the door unit to the frame.

Hopper: A window unit in which the top of the sash swings inward.

I

Inactive Door (Also See Passive Door): In a double door unit, this is the door that has the T-Astragal and the flush bolts. This door will also act as a secondary entrance.

Insulating glass (IG): A combination of two or more panes of glass with a hermetically sealed air space between the panes of glass. This space may or may not be filled with an inert gas, such as argon.

J

Jalousie window: Louver blades open to maximize airflow through opening.

Jamb: The main vertical members forming the sides of a window or door frame.

Jamb Depth: A measure of the depth or width of the jamb, perpendicular to the door panel when closed.

Jamb Liner: In a modern double-hung window, the track installed inside the jambs on which the window sashes slide.

K

Kerf: The gut or groove manufactured in a door or window frame or sash which houses weather-stripping. The kerf normally measures 3/8" deep by 1/8" wide (saw blade width).

Knocked Down: Indicates that the product has been pre-assembled at factory, unassembled for shipping and must be assembled on site.



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Common Door & Window Terms

L

Laminate: A skin applied to a core. Generally substantially thicker than a veneer. Laminates are used in exterior and interior applications, whereas veneers are more suited for interior applications.

Left-hand swing: The door opens counter-clockwise, regardless of your point of reference.

Lift: A handle or grip installed on the bottom rail of the lower sash of a double-hung window to make it easier to raise or lower the sash.

Light or lite: Glazing framed by muntins and/or sash in a window or door.

Light shaft: An insulated shaft built to direct light from a skylight through the attic to the room below.

Lintel: The top part of a doorway, also known as the head or top jamb. A lintel is usually concrete, steel or stone.

Lock Rail: Horizontal member of a door unit located where the locking mechanism would be installed.

Lockset: The complete handleset with locking system.

Low-E glass: A common term used to refer to glass which has low emissivity due to a film or metallic coating on the glass or suspended between the two lights of glass to restrict the passage of radiant heat.

Lower Sash: The bottom portion of the window comprised of a pane of glass set inside a frame. Is fixed in a single hung window and slides up and down in a double hung window.

M

Masonry opening: The space in a masonry wall left open for windows or door.

Mortise: A slot or rectangular cavity cut into a piece of wood to receive another part.

Mortise-and-tenon: A strong wood joint made by fitting together a mortise in one board and a matching projecting member (tenon) in the other.

Mortise Lock: A lock which is placed in a precut slot inside the door's edge.

Mull Cover: A mould which covers the mull post.

Mull Post: The post between the door and sidelite created by the door frame.

Mullion: A wood or metal part used to structurally join two window or door units.

Multi-Point Locking System: Multiple locks located in various places on the door panel and frame.

Muntin: Applies to any short or light bar, either vertical or horizontal, used to separate glass in a sash into multiple lights. Also called a windowpane divider or a grille.

Muntin Bar: Any small bar that divides a windows glass. Also called a grille or windowpane divider.

N

Nail Fin: Windows with nail-on frames are for new construction.



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Common Door & Window Terms

O

Opening Size: The measure of the door frame's opening. Measured from the floor to the head rabbet vertically and between the jam rabbets horizontally. Larger than the actual size of the door itself: it also includes room for clearance.

Overhang: How far the roof extends past a wall.

P

Palladian window: A large, arch-top window flanked by smaller windows on each side.

Parting stop: In a double-hung window, a strip of wood applied to the jamb to separate the sash.

Pane: A framed sheet of glass within a window.

Panel: A piece of wood or glass placed into openings left in a wood door.

Passive Door (Also See Inactive Door): In a double door unit, this is the door that has the T-Astragal and the flush bolts. This door will also act as a secondary entrance.

Passive solar collector: Any glazed area in the walls or roof of a building pointed to the south to take maximum advantage of the sun's heat without a mechanical (or active) method of storage or distribution of the heat.

Picture Window: Non-venting or non-operable window. Also know as a fixed window.

Pre-Hung: A full unit with the door hinged and an assembled jamb, frame, sill and moulding. For shipping, units may be Knocked Down (KD) or Set Up.

Primer: The coating applied before a coat of paint or finish.

R

R-Value: Resistance to thermal transfer or heat flow. Higher R-value numbers indicate greater insulating value.

Rails: The top and bottom horizontal members of the framework of a window sash or door slab.

Right-hand swing: The door opens clockwise, regardless of your point of reference.

Rough Opening: Dimensions of the opening in the framework of the home required to install a complete door unit. (allowing ½" clearance on top and each side for stabilization shims)

S

Saddle: Another term sometimes used for the threshold.

Sash: A single assembly of stiles and rails made into a frame for holding glass.

Sash balance: A system of weights, cords and/or coiled springs which assist in raising double-hung sash and tend to keep the sash in any placed position by counterbalancing the weight of the sash.

Sash cord: In double-hung windows, the rope or chain which attaches the sash to the counter balance.

Sash lift: A protruding handle screwed to the inside bottom rail of the lower sash on a double-hung window.

Sash weights: In older double-hung windows, the concealed cast-iron weights which are used to counterbalance the sash.



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Common Door & Window Terms

Seat board: A flat board cut to fit the contour of a bow or bay window and installed between the sills and the flat wall surface, providing a seat or shelf space.

Shims: Wood wedges (often wood shingles) used to secure the window or door unit in the rough or masonry opening in a square, level and plumb position during and after installation.

Side Jamb(window): Grooves in window that allows the window sashes to slide up and down or side to side

Sidelite: Narrow fixed units mullied or joined to door units to give a more open appearance.

Sill: The bottom horizontal piece of a door or window unit. Includes both the threshold and the subsill.

Sill (window): Located at the very bottom of the window, the sill is usually sloped to allow water to run off the bottom of the window in rain or during cleaning.

Sill Extension: A matching piece that usually slides into the outer edge of the sill that extends the overall width by an additional 1-3 inches.

Simulated divided light: Also known as a SDL. A method of constructing windows in which muntins are affixed to the inside and outside of a panel of insulating glass to simulate the look of true divided light.

Single Bore: One hole drilled in the door for a handset.

Single glazing: Use of single panes of glass in a window. Not as energy-efficient as double glazing.

Single-hung: A double-hung type of window in which the top sash is fixed or inoperable.

Sloped Sill Adapter: Used to cover the gap between the old sloped sill window and the new block frame window. It adapts a new window to the existing sloping sill.

Solar gain: The process of providing a net heat gain within a structure, over and above the normal heat loss, by passive collection of the sun's heat through windows and other glazed areas.

Stationary Door: Also called Stat Door. This is a fixed, non-operational slab of a door unit. They can be found in any door configuration, but most commonly in center-hinge double units and larger.

Stile: The main vertical members of the framework of a window sash or door slab.

Stool: An interior trim piece on a window which extends the sill and acts as a narrow shelf.

Stop: A wood trim member nailed to the window frame to hold, position or separate window parts. The stop is often molded into the jamb liners on sliding windows.

Stiles: The two outer vertical wood pieces of a door panel.

Strikeplate: The plate that covers the latch and deadbolt of a lock. Used to protect the jamb.

Subsill: The area below the threshold. Often will have a way to drain water away from the door.

Swing-in: A door which opens inwards towards the house. May be a right-hand or left-hand swing.

Swing-out: A door which opens out from the house. May be a right-hand or left-hand swing.

T

T-Astragal: The component that closes the gap between a pair of doors. Used to provide a door stop, on exterior usage also has a weather seal.



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Common Door & Window Terms

Tempered glass: Glass manufactured to withstand greater than normal forces on its surface. When it breaks, it shatters into small pieces to reduce hazard. Standard on all doors and large fixed windows.

Tenon: A rectangular projection cut out of a piece of wood for insertion into a mortise.

Thermal break: The addition of a thermal insulating material between two thermally conductive materials.

Threshold: The bottom sill of the door unit which acts as the bottom of the frame unit and achieves the water and air barrier that meets with the door sweep.

Threshold Extension: A matching piece that usually slides into the outer edge of the threshold that extends the overall threshold width by additional 1-3".

Transom: A small window that fits on top of a door or window, primarily for additional light and aesthetic value.

Trim: A strip placed over the face of a door jamb for decorative purposes.

True divided light: A term which refers to windows in which multiple individual panes of glass or lights are assembled in the sash using muntins.

U

U-value: Rate of heat flow-value through the complete heat barrier, from room air to outside air. The lower the U-value, the better the insulating value.

Upper Sash: The top portion of the window comprised of a pane of glass set inside a frame. Is fixed in a single hung window and slides up and down in a double hung window.

Unison lock: A casement locking system which secures the window at two locking points by operation of one handle.

V

Vapor barrier: A watertight material used to prevent the passage of moisture into or through floors, walls and ceilings.

Veneer: A very thin but stable skin applied to a core. Generally used in interior applications.

Vent Unit: A window or door unit that opens or operates.

Vinyl: A plastic material used for cladding or entire window units.

Veneer: A very thin but stable skin applied to a core. Generally used in interior applications.

W

Weather-strip: A material or device used to seal the openings, gaps or cracks of venting window and door units to prevent water and air infiltration.

Windload: Force exerted on a surface by moving air.



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Commonly Used Abbreviations

2064 - 20" x 64" Insert

2264 - 22" x 64" Insert

ACT - Active Panel

BBG - Blinds Between Glass

CA - Customer Approval

DH - Double Hung

DOP - Date of Purchase

DRCAM - Days to Return Customer Approval

DSM - District Service Manager

DSO - Days Scheduled Out

DTS - Days To Schedule

EPA - Environmental Protection Agency

ETA - Estimated Time of Arrival

GBG - Grill Between Glass

H/O - Homeowner

IG - Insulated Glass

IS - In Swing

LF - Lite Frame

LH - Left Hand

LT - Lite

LTF - Lead Test Form

M - Indicates Measure PO

MPLS - Multi-Point Lock System

NCPO - No Cost Purchase Order

OS - Out Swing

P - Indicates Permit PO

PAS - Passive Panel

POD - Proof of Delivery

PreRen - EPA Pre-Renovation Form

RH - Right Hand

RMA - Return Merchandise Authorization

RP - Replacement Part Number

RRP - Renovation, Repair, and Painting Program

RSM - Regional Service Manager

S/L/P/T - Square, Level, Plumb, True

SDL - Simulated Divided Light

SH - Single Hung

SL - Side Lite

STAT - Stationary (Fixed) Panel

T-Hold - Threshold

TDI - Texas Department of Insurance

THD - The Home Depot

VOC - Voice Of the Customer

ZCPO - Zero Cost Purchase Order



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Infor CRM

RF Installations is proud to announce the availability of our web site to the stores through the **MyApron Portal**. You will now have the access to every purchase order for your store. This will include:

- 2 way Note communication
- Ability to download and print measures, purchase orders and our field escalation sheets
- Check door status and enter Notes as to an updated eta
- Scheduling information along with notes on customer contact attempts.

We have provided a website to streamline the information to each store; however, we will continue to send the job summaries and daily notes. Our plan is to eventually have these on the web site so they can easily be printed as needed. Please understand that the site is in its infancy, in a couple of months we will send out a form so you can give us your input on how we can make the site better for everyone.

We only ask that this be used prior to making a phone call to the office. The following is the step by step process for accessing the website.

To access the new Infor CRM site:

1. In the toolbar on your main desktop, click on the Google Chrome Icon. (This is the icon that looks like a beach ball)
2. Enter the following address in the address bar and click enter: www.rfinstallations.com.
3. The RF Installations site opens.
4. At the RF Installations site, click on the Login.
5. Next click on the Sub-Contractor / Store Login link. The Infor CRM login screen will open.
6. On the login screen, add your User Name, which is your 4 digit store number (e.g. 0159 or 6979) and your Password, which is the last 4 digits of your store telephone number (e.g. 8042 or 0220).
7. Next click Log On.

My Workspace

When first opening Infor CRM you will see the Welcome page along with the basic layout.

Your dashboard is broken down into several sections to help navigate the system and make it easy for you to find what you are looking for.

1. Menu Bar- The Menu Bar across the top is the same on every page that you navigate to.

2. Navigation Bar - Located on the left side of the Infor CRM workspace, the Navigation Bar contains buttons that open the main views; Welcome, Work Orders and Notifications

3. My Workspace - This is the where the information you are looking for will be displayed. On the Welcome page, we have provided some quick navigation tiles, giving you a quick snapshot of what is going on with your PO's.

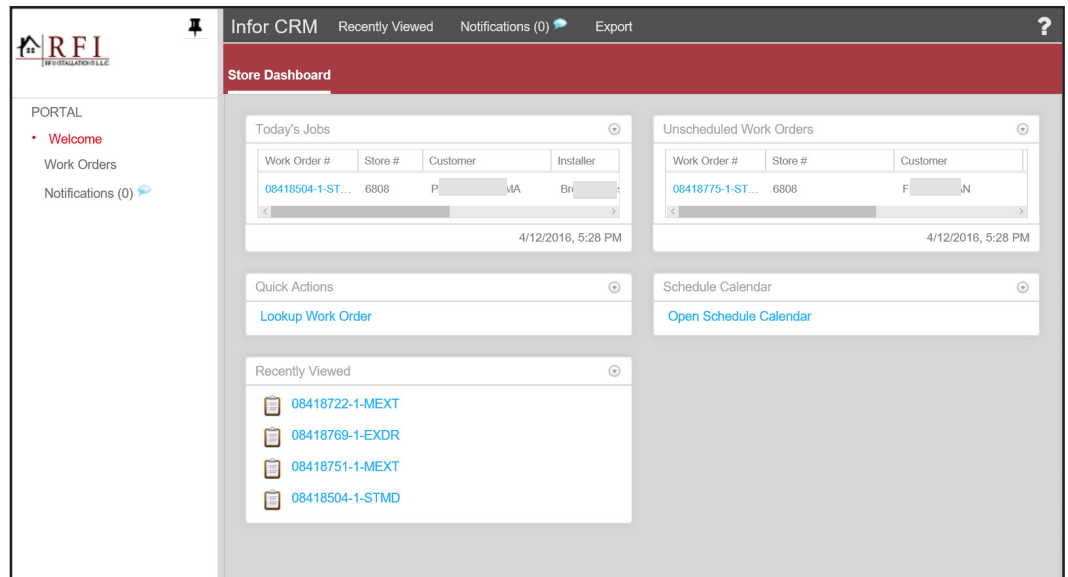
a. Today's Jobs - This section will show you a list of everything that is scheduled for the current day.

b. Unscheduled Work Orders - This section will show you a list of all unscheduled work orders.

c. Quick Actions - This section gives you a quick link to look up a PO to get the status.

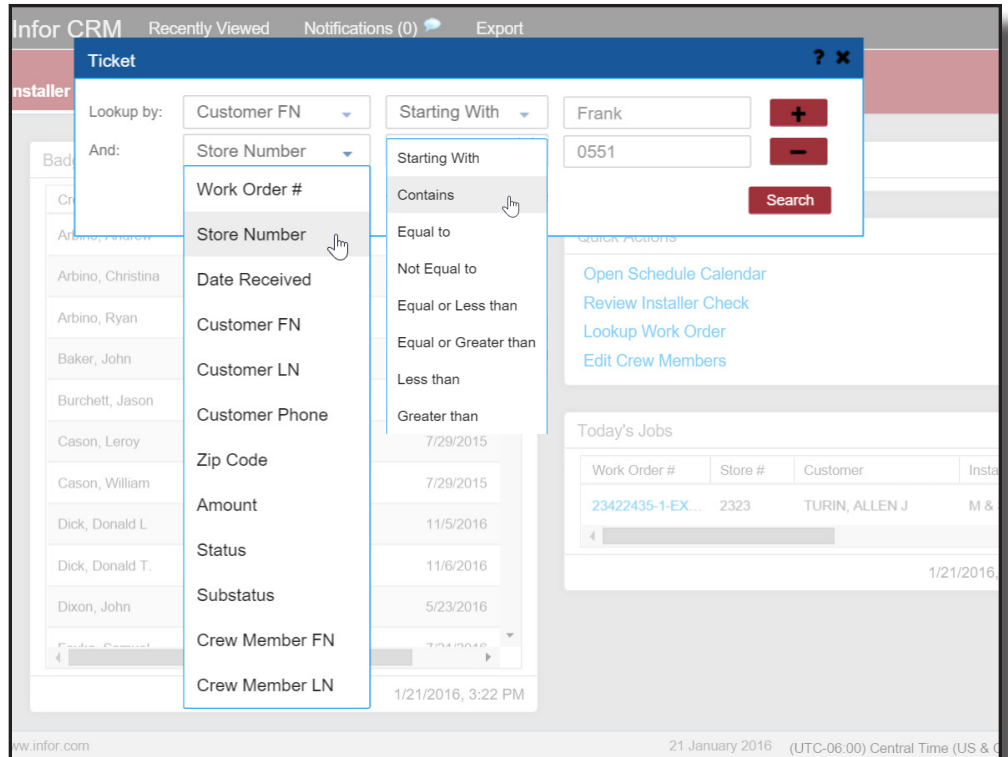
d. Schedule Calendar - This section will give you a calendar view of scheduled jobs. Please keep in mind, that the installer works out of multiple stores, so this will just show your PO's.

e. Recently Viewed - This section will give you a running list of your recently viewed PO's.



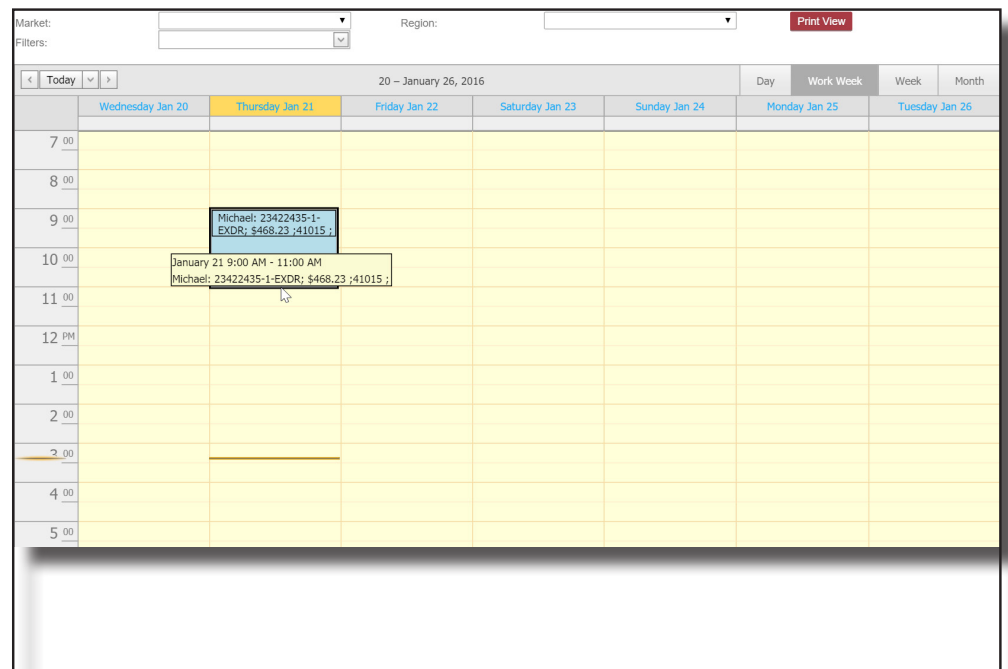
Lookup Work Order

1. To easily access a work order, click on the Lookup Work Order hyperlink. The lookup screen opens.
2. Use the drop-down arrows to choose how you want to look up the work order, e.g. Work Order #, Store Number, etc.
3. You may want to search by two or more parameters to help narrow your results down. You can add another equation by clicking on the + sign.



Schedule Calendar

1. When you open the Schedule Calendar, you will see a grid view of all of the scheduled PO's for your store. Each installer will be shown in a different color.
2. You can also open a specific work order from this screen by double-clicking the PO on the calendar.





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Infor CRM

Work Orders Link

1. Clicking the Work Orders link in the side navigation bar will take you to multiple tabs, giving you access to see what PO's are in each status.

To open a Work Order to see the details for that order, simply click on the blue hyperlink in the first column.

To navigate between the tabs, use the arrows on each end of the tab navigation bar.

The following tabs are available for you to search through:

Work Order #	Store Numit	Date Receive	Scheduled Date	Installer	Customer FN	Customer LN	Cu... Phon	Crew Member FN	Crew Member LN	Amount	Status Code	Substatus
0841820 0-1-EXDR	6808	2/9/2016	4/18/2016		TRACY			Mark		220.05	Scheduled	Scheduled
0841832 2-1-EXDR	6808	2/23/2016	4/18/2016		TRACY			Mark		14.55	Scheduled	Scheduled
0841834 3-1-EXDR	6808	2/26/2016	4/18/2016		PHILIP			Mark		247.45	Scheduled	Scheduled
0841834 8-1-EXDR	6808	2/26/2016	4/28/2016		HILARI			Mark		374.40	Scheduled	Scheduled
0841847 4-1-EXDR	6808	3/12/2016	4/19/2016		ALEX			Mark		385.09	Scheduled	Scheduled
0841848 7-1-MEXT	6808	3/13/2016	4/16/2016		MARIA			Brent		25.00	Scheduled	Scheduled
0841850 4-1-STMD	6808	3/15/2016	4/12/2016		ANORMA			Mark		181.25	Scheduled	Scheduled
0841854 0-1-MEXT	6808	3/19/2016	4/16/2016		DIANA			Brent		25.00	Scheduled	Rescheduled
0841858 0-1-MPAT	6808	3/23/2016	4/16/2016		MARIA			Mark		25.00	Scheduled	Scheduled
0841867 3-1-MEXT	6808	4/3/2016	4/15/2016		ZAIN			Mark		25.00	Scheduled	Scheduled
0841869 5-1-	6808	4/4/2016	4/27/2016		STEVEN			Brent		160.05	Scheduled	Scheduled

- 1.1 Unscheduled Work Orders** - This tab will show you all PO's that are unscheduled, but ready to schedule.
- 1.2 Scheduled Work Orders** - This tab will show you all PO's that are scheduled.
- 1.3 Work Orders on Special Order** - This tab will show you all PO's that are in Special Order status.
- 1.4 Work Orders on Hold** - This tab will show you all PO's that are on Hold.
- 1.5 WO with Permit Required** - This tab will show you all PO's that require a permit.
- 1.8 WO on Warranty** - This tab will show you all PO's that are in Warranty Visit status.
- 1.9 Completed Work Orders** - This tab will show you all completed work orders.
- 2.8 RRP Jobs** - This tab will show you all jobs that are Lead Positive and require RRP Practices.
- 3.6 Installs Not Sold** - This tab will show you all measures that have not converted to installs. This tab is great to work when Specialists are looking to boost sales.



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Infor CRM

1. Once a work order is opened, you will see the Detail View. This will show you all of the Work Order Specific data for that PO. This includes:

- a. Customer Name
- b. Customer Phone Numbers
- c. Customer Address
- d. RFI Field Manager
- e. Store # & Phone
- f. Status
- g. Installer & Crew Member
- h. Work Order #, PO# & Job Type
- i. Received Date
- j. Amounts
- k. Schedule Dates
- l. Year Home Built
- m. CA/Measure Received and Sent Dates
- n. Work Order Tabs - The Work Order Tabs will allow you to see additional information about the PO. These tabs include:

- **Notes**
- **Attachments**
- **Products**
- **Activities**
- **Related Work Orders**

2. The Notes section gives you a time stamped history of what has been entered for the specific PO. All notes entered in ESVS are automatically added to this section. All notes entered by RFI are also visible here. You also have the option to submit a note to RFI in this section.

- Enter your note in the Comments box
- Press the Submit button
- If you would like the note to be copied to the Install PO, click the Copy to Install button

Work Order - 08418487-1-MEXT

Work Orders

Customer First Name: MARIA Home Phone: Work Phone: Address: 1500 SV
 Customer Last Name: City: PFLUGERVILLE
 Mapsco ID: Email: MALOU_R... State: TX
 Address Lookup Zip: 78660
 Job Site Address: 1500 SV
 City: PFLUGERVILLE
 State: TX
 Zip: 78660

Field Manager: Jason Boor Store #: 6808 On Hold:
 Field Manager Phone: Store Phone #: (512) 990-5413 Special Order:
 Installer: Status: Scheduled
 Crew Member: Sub Status: Scheduled
 Installer Phone: Message
 Installer Email: bri

Work Order #: 08418487-1-MEXT Contact Deadline: 3/14/2016 Sent Bundle:
 PO #: 08418487 Scheduled Date: 4/16/2016 8:00 AM Permit Required:
 Job Type: MEXT Scheduled in SPN: CA/Measure Received Date:
 Received Date: 3/13/2016 4:36 PM Scheduled On 4/8/2016 by Scott, Amanda DSO: 7 CA/Measure Sent:
 Duration: 2 Reduce PO Needed: Reduce PO Attached:
 Is Measure: Year Home Was Built: 2004 No RTS Required: Change Order Attached:
 Amount: \$25.00 Customer Not Required: Warranty: Change Order Document Needed:
 Materials Amount: \$0.00 Additional Labor:
 Installer Amount: \$25.00 Trip: Lost Job:

Custom Labor:

drag a tab here to show it in this area

Notes Attachments Products Activities Related Work Orders

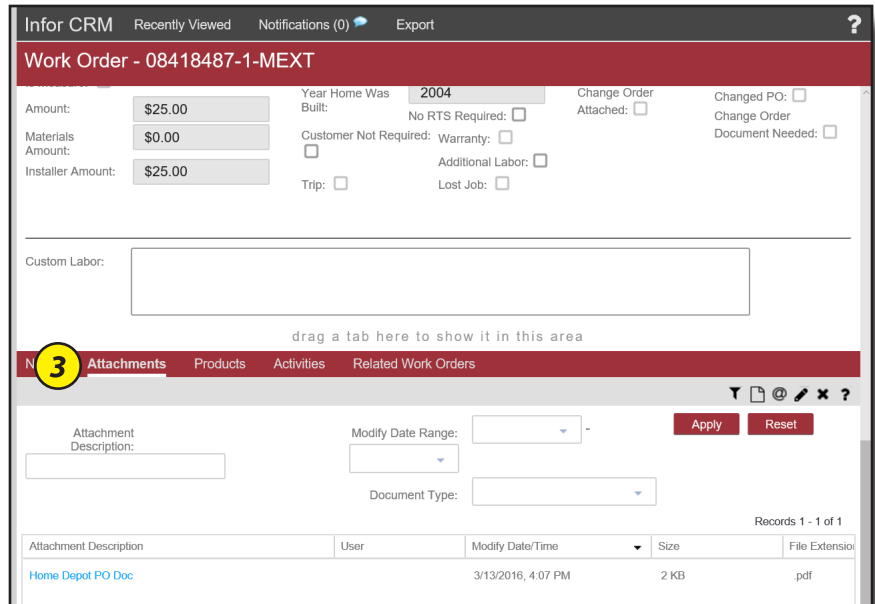
Comments: Submit

Type	Date/Time	Access	Create User	Comments	Export to SPN	Copy to Install
New Note	4/8/2016 4:50 PM	1-Public	Scott, Amanda	Work order scheduled for Adams, Brent on 4/16/2016 at 8 AM - 10 AM	<input checked="" type="checkbox"/> Exported: 4/8/2016	<input type="checkbox"/>
Customer Update	4/6/2016 12:40 PM	1-Public	Scott, Amanda	tried texting customer.	<input checked="" type="checkbox"/> Exported: 4/6/2016	<input type="checkbox"/>
Customer Update	3/31/2016 12:06 PM	1-Public	Scott, Amanda	Per customer VM, best time to call is after 5PM	<input checked="" type="checkbox"/> Exported: 3/31/2016	<input type="checkbox"/>
Customer Update	3/30/2016 12:55 PM	1-Public	Scott, Amanda	lm	<input checked="" type="checkbox"/> Exported: 3/30/2016	<input type="checkbox"/>
Customer Update	3/29/2016 5:49 PM	1-Public	6808, Customer Order Specialist	Installer - have you tried to contact this customer to schedule measure since 3-17-16? Thanks, Cindy/cos	<input checked="" type="checkbox"/> Exported: 3/29/2016	<input type="checkbox"/>
Customer Update	3/21/2016 7:16 PM	1-Public	6808, Customer Order Specialist	Installer - have you tried to contact this customer to schedule measure since 3-17-16? Thanks, Cindy/cos	<input checked="" type="checkbox"/> Exported: 3/22/2016	<input type="checkbox"/>

3. The Attachments section gives you access to all documents that have been uploaded into Infor CRM. This includes:

- Home Depot PO Documents
- Completed Measures
- Photos
- Field Manager Site Visit Reports
- Any additional documents sent to RFI

Clicking on the blue hyperlink will open the document, which can be printed.



Infor CRM Recently Viewed Notifications (0) Export

Work Order - 08418487-1-MEXT

Amount: \$25.00 Year Home Was Built: 2004 Change Order Attached: Changed PO:
 Materials Amount: \$0.00 No RTS Required: Change Order Document Needed:
 Installer Amount: \$25.00 Customer Not Required: Warranty:
 Trip: Additional Labor: Lost Job:

Custom Labor:

drag a tab here to show it in this area

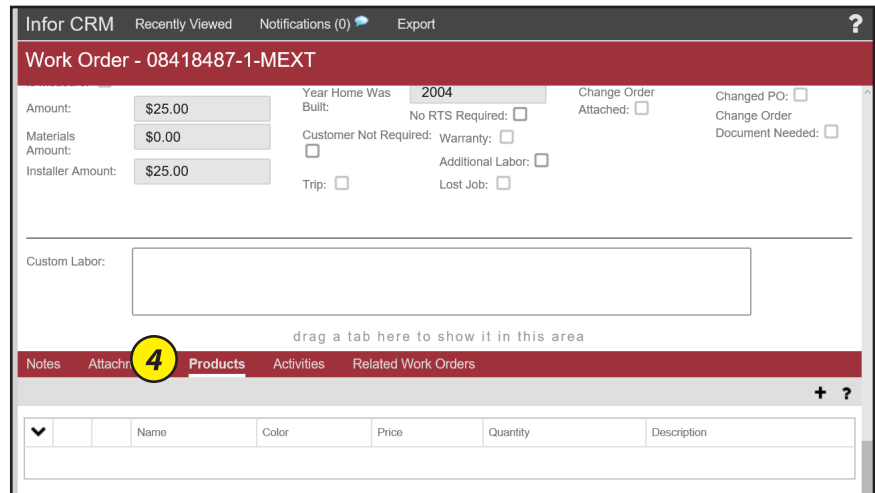
3 Attachments Products Activities Related Work Orders

Attachment Description: Modify Date Range: - Apply Reset
 Document Type:

Records 1 - 1 of 1

Attachment Description	User	Modify Date/Time	Size	File Extension
Home Depot PO Doc		3/13/2016, 4:07 PM	2 KB	pdf

4. The Products tab will list out all products that are on the Home Depot PO that RFI receives. This lists out everything that is going to be picked up by the installer.



Infor CRM Recently Viewed Notifications (0) Export

Work Order - 08418487-1-MEXT

Amount: \$25.00 Year Home Was Built: 2004 Change Order Attached: Changed PO:
 Materials Amount: \$0.00 No RTS Required: Change Order Document Needed:
 Installer Amount: \$25.00 Customer Not Required: Warranty:
 Trip: Additional Labor: Lost Job:

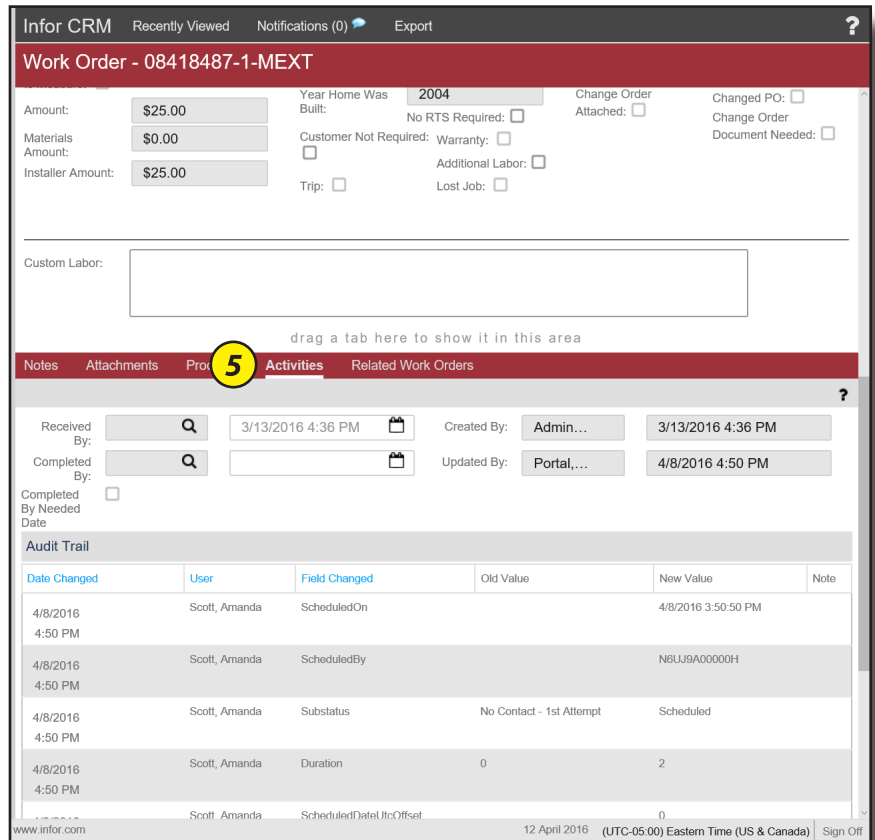
Custom Labor:

drag a tab here to show it in this area

Notes Attachments **4** Products Activities Related Work Orders

Name	Color	Price	Quantity	Description

5. The Activities log is the audit trail of the Work Order. You can filter your results by clicking on the lookup buttons near Received By or Completed By.



Work Order - 08418487-1-MEXT

Amount: \$25.00 Year Home Was Built: 2004 Change Order Attached: Changed PO:
 Materials Amount: \$0.00 No RTS Required: Change Order Document Needed:
 Installer Amount: \$25.00 Customer Not Required: Warranty:
 Trip: Additional Labor: Lost Job:

Custom Labor:

drag a tab here to show it in this area

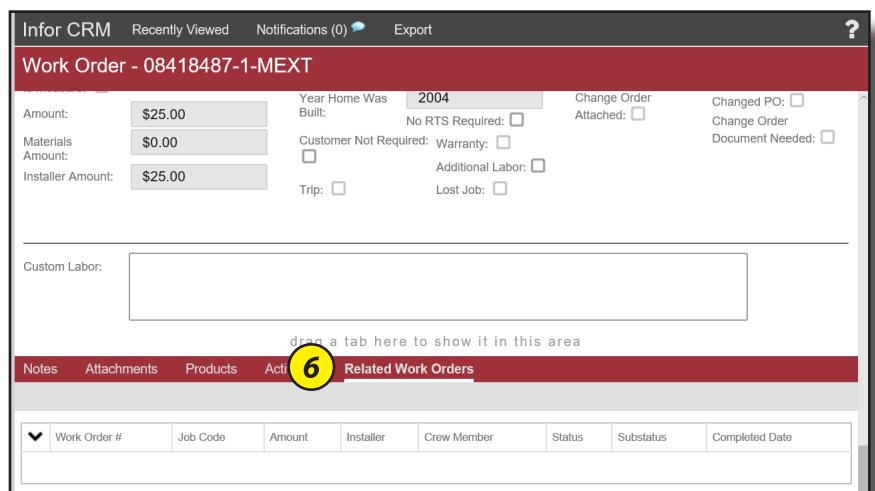
Notes Attachments Products **5 Activities** Related Work Orders

Received By: 3/13/2016 4:36 PM Created By: Admin... 3/13/2016 4:36 PM
 Completed By: Updated By: Portal... 4/8/2016 4:50 PM
 Completed By Needed Date:

Date Changed	User	Field Changed	Old Value	Now Value	Note
4/8/2016 4:50 PM	Scott, Amanda	ScheduledOn		4/8/2016 3:50:50 PM	
4/8/2016 4:50 PM	Scott, Amanda	ScheduledBy		N6U9A0000H	
4/8/2016 4:50 PM	Scott, Amanda	Substatus	No Contact - 1st Attempt	Scheduled	
4/8/2016 4:50 PM	Scott, Amanda	Duration	0	2	
4/8/2016 4:50 PM	Scott, Amanda	ScheduledDateUtcOffset		0	

www.infor.com 12 April 2016 (UTC-05:00) Eastern Time (US & Canada) Sign Off

4. The Related Work Orders tab allows you to view all related work orders, if any, for the customer by clicking on the Work Order # hyperlink.



Work Order - 08418487-1-MEXT

Amount: \$25.00 Year Home Was Built: 2004 Change Order Attached: Changed PO:
 Materials Amount: \$0.00 No RTS Required: Change Order Document Needed:
 Installer Amount: \$25.00 Customer Not Required: Warranty:
 Trip: Additional Labor: Lost Job:

Custom Labor:

drag a tab here to show it in this area

Notes Attachments Products Acti **6 Related Work Orders**

Work Order #	Job Code	Amount	Installer	Crew Member	Status	Substatus	Completed Date

If at any time you have any questions or concerns about the Infor CRM system and cannot find the answers in this training guide, please reach out to your RFI Field Manager