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\*\*\* Soft Copy (PDF) of Store Binders – can be found online

\* You can find a copy on [www.rfinstallations.com](http://www.rfinstallations.com)

On the login section, under the store login, the “Home Depot Store Guide”

# Job Types

<u>Job Code</u>	<u>Description</u>
EXDR	Exterior Door Install
MEXT	Exterior Door Measure
INTD	Interior Door Install
MINT	Interior Door Measure
PTDR	Patio Door Install
MPAT	Patio Door Measure
STMD	Storm Door
MSTM	Storm Door Measure
PRMT	Permit
PPTDR	Permit Required PTDR
PSTMD	Permit Required STMD
MGRD	Garage Door Measure
GDOI	Garage Door Opener Install
TRIP	TRIP CHARGE
CBEXT	CB External

# Measure Process

- 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.



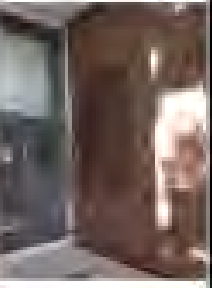
# Measure Process Conti...

- The status of the measure can be found in the notes of the system (both HD System and Infor CRM).
- With in 48 business hours of the measure being completed; a copy of the completed measure form can be found 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 **call us first**, we can work together to get the customer the right product.
  - 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.

# Completed Measure Example

Door Site Inspection Form			Door   of	
Store #	Measure PO	Customer Name	Date	Measurer Company & Name
0554	5446735	McClain	6 May	RFI-Matthew Tubbs
Door Direction (N-S-E-W)	Location of Door	Overhang	Measurer Email	Measurer Phone
E	Front	6" OR MORE	Matthew.Tubbs@rfi.com	602-225-7972
<b>Existing Conditions</b>				
Opening		Unit Size	Exterior	Lock Prep
Width x Height	Width x Height	Year (1988)	▼	Handing
Type: Rough Opening	62" x 81-1/2"		▼	
62-1/2" x 82"	If clad is	Jamb	Type: ▼	
Masonry Opening	Self-cut	Width x Yr (6" x 18")	Backset: ▼	
x	y		2 1/8" ▼	
Sidelight	Slab Information	Customer Selection Notations: *****		
Thickness:		Will Customer's selection fit? ▼		
Notes:		Comments / Suggestions		
Location		Additional conditions notes:		
Materials Needed for Installation		Installation Options and Pricing		
Quantity	Qty and Description	In Exposed		
250-807	Black Metal Printed	<input checked="" type="checkbox"/>	Sub all minor \$85	
1-0-332	Darking Bead 1/2" x 3/4"	<input checked="" type="checkbox"/>	Hail away \$50	
548741	Door Stop 7 1/8" Style		Hang storm door \$997	
3	901459 1x2x8 Solid Pine		Jamb extension \$150	
3	923484 1x4x8 Solid Pine		Re-trim \$50	
24'	502440 1x2x8 Wedge Casing Pinned	<input checked="" type="checkbox"/>	Cut header \$75	
	6922-3-12 milly rubber (10' or more)		Permit \$120	
8'	60104 Ce Board 1/2" x 6" x 8"		Floor outback \$75	
1	718999 Bell Insulation		Re-trim opening \$75	
			Extra Hardware \$20 perphole	
			Build down \$75	
			Custom Labor Notes	
Existing Pictures   		Wants double hung Pressure treated 2x8x8		
		***** EPA Lead Notations *****		
		Home Built: 1978		
		Lead Test Results		
		Lead Removal Cost: EPA Pamphlet Given to CST		

## Most Common Additional Labor Examples

### A build In/down Fee

when the door opening is bigger than the width of the Entry/Patio Door. The installer closes in the opening of the door by adding strips of wood around the perimeter of the opening.



### A threshold build up or Subsill replacement

is needed when the sub flooring is rotted under the threshold or not high enough to set the door on to close up the rough opening. It is also needed 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)**





## Most Common Additional Labor Examples

### Exterior Door Build out for Storm Doors

Occurs 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

Occurs when there is rot to the door jamb or surrounding trim that needs to be replaced for Storm Door installation. **(Important note!! non-structural repairs only)**

**(Replace Brick Moulding only)**



Before



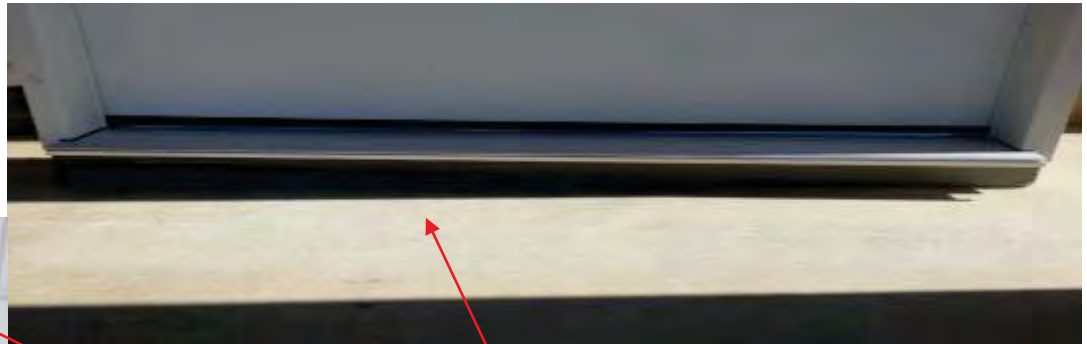
After



## Sill Supports

Sill supports for the most part 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 door is to be installed on.

\*\*\* Application and products vary by Location \*\*\*



**UNSUPPORTED, WILL FLEX  
WHEN STEPPED ON**

# Once Install Quote Is Sold

- RFI will electronically receive the purchase order and it will be loaded the Sales Logix 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 hours (business) 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.

# On Scheduled Install Day

- 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; and the scope of work is allowed under the HD Installation program the installer will contact Install2Go with retail costs for repairs, customer will pay for repairs over the phone, and the installation will proceed.
  - In cases where the scope of work is not allowed under the HD Installation program 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.
  - If the customer is happy and has no concerns installer will obtain signature for the CA.

# Post Installation

- After installation any concerns you may have or calls from the customer; please contact your RFI Field Manager.
- RFI will key rec all measures and installs.

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

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 pre-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

## National Vs State Requirements

- The EPA allows other entities (state and local governments) to regulate and enforce their own RRP programs as long it is approved by the EPA.
- Wisconsin, Iowa, North Carolina, California, Kansas, Mississippi, Rhode Island, Utah, Oregon, Massachusetts, and Oklahoma.
- 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.

# Chargebacks

- All chargebacks are sent to:
- [chargebacks@rfinstallations.com](mailto:chargebacks@rfinstallations.com)
- Direct Fax: 817-704-4543
- We process all chargeback paperwork for all installers and post approval numbers or denials in Infor CRM. Any questions please contact your Field Manager.





# **RF Installations LLC**

## **Store Guide**

Infor CRM 8.2

## Store Infor Training Guide

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Store Number: \_\_\_\_\_

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 stream line 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.

Thank you

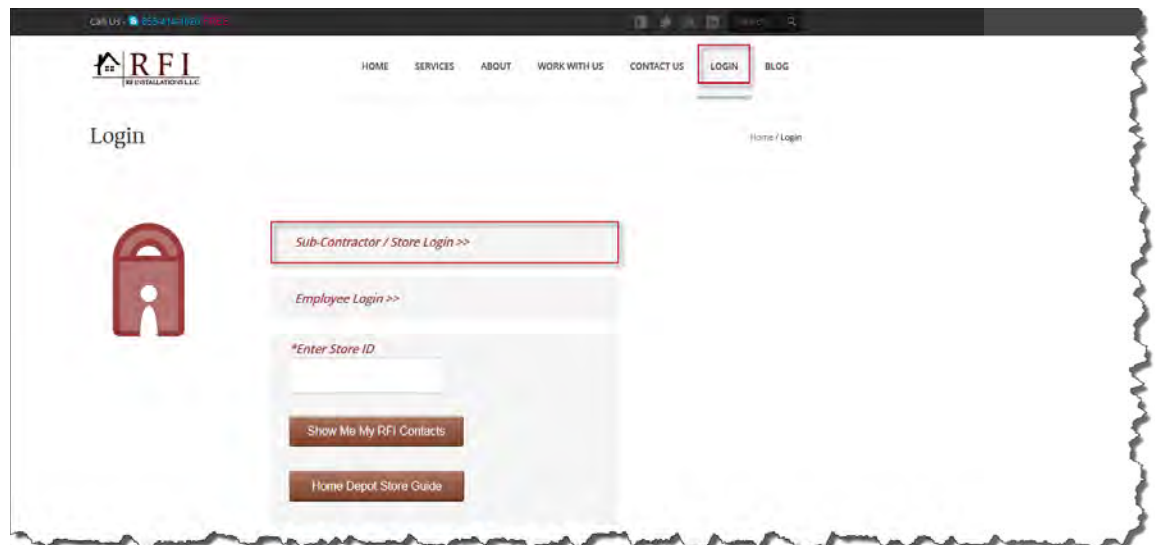
## Logging On

To access the new Infor CRM site:

1. Go to the **MyApron Portal**.
2. On the **My Workbench** page, scroll down to the **Home Depot Website** section (likely in the bottom left section of the page)
3. Click **Browse the Internet**.
4. Where the page says **Type the web address in the above bar**, type: [www.rfinstallations.com](http://www.rfinstallations.com). Click **Go**.
5. The RF Installations site opens.
6. At the RF Installations site, click on the **Login**.



7. Next click on the **Sub-Contractor / Store Login** link. The Infor CRM login screen will open



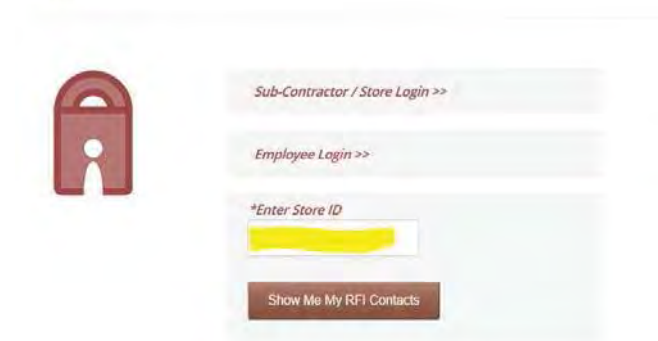
8. On the login screen, add your **User Name**, which is your 4-digit store number (e.g. 0159 or 6979) and your **Password**, which is the last 4 digits of your store telephone number (e.g. 8042 or 0220).
9. Next click **Log On**.

## RFI Contact

RFI Contact – there is also a section here for you to look up your stores Field Manager and Regional Managers Contact info.

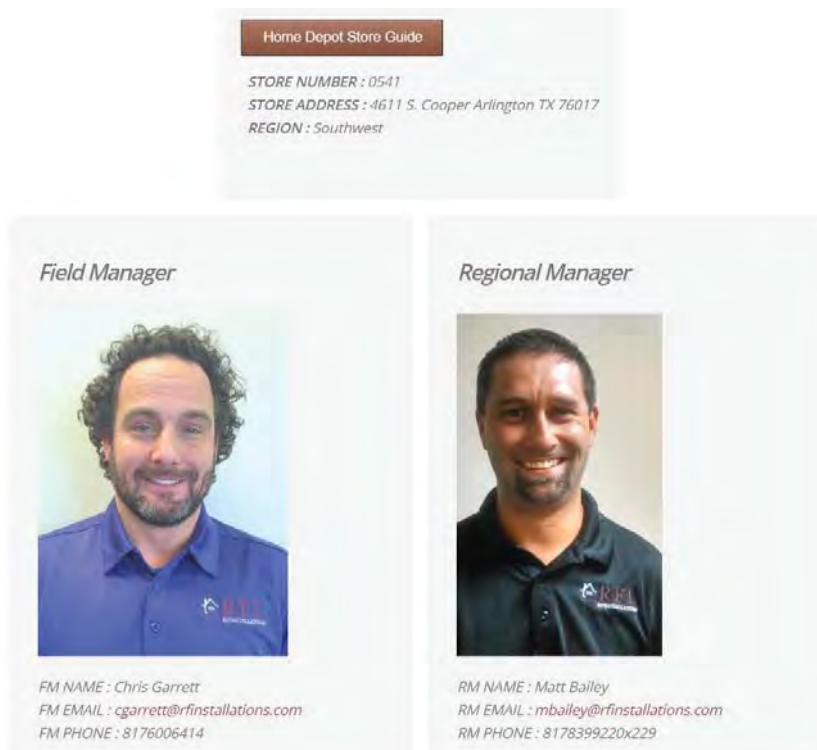
Just enter your 4 digit - store number in the “\*Enter Store ID” box...

Login



Then hit “Show Me My RFI Contact”


You will then see your RFI Contacts...



Home Depot Store Guide


STORE NUMBER : 0541  
STORE ADDRESS : 4611 S. Cooper Arlington TX 76017  
REGION : Southwest

**Field Manager**



FM NAME : Chris Garrett  
FM EMAIL : cgarrett@rfinstallations.com  
FM PHONE : 8176006414

**Regional Manager**



RM NAME : Matt Bailey  
RM EMAIL : mbailey@rfinstallations.com  
RM PHONE : 8178399220x229

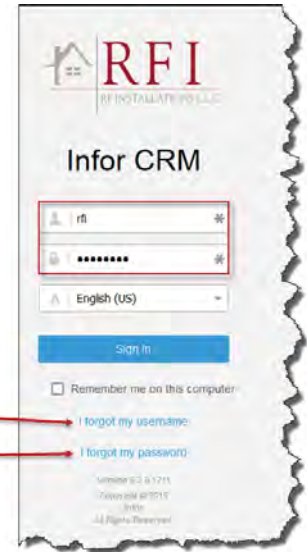
The portal **Welcome** page opens.



**Note**

If you have forgotten your username or password, click on the link and you will be taken to a screen to enter your email and you will automatically be sent an email to reset.




New feature, if you have forgotten your **username** or **password**, click here



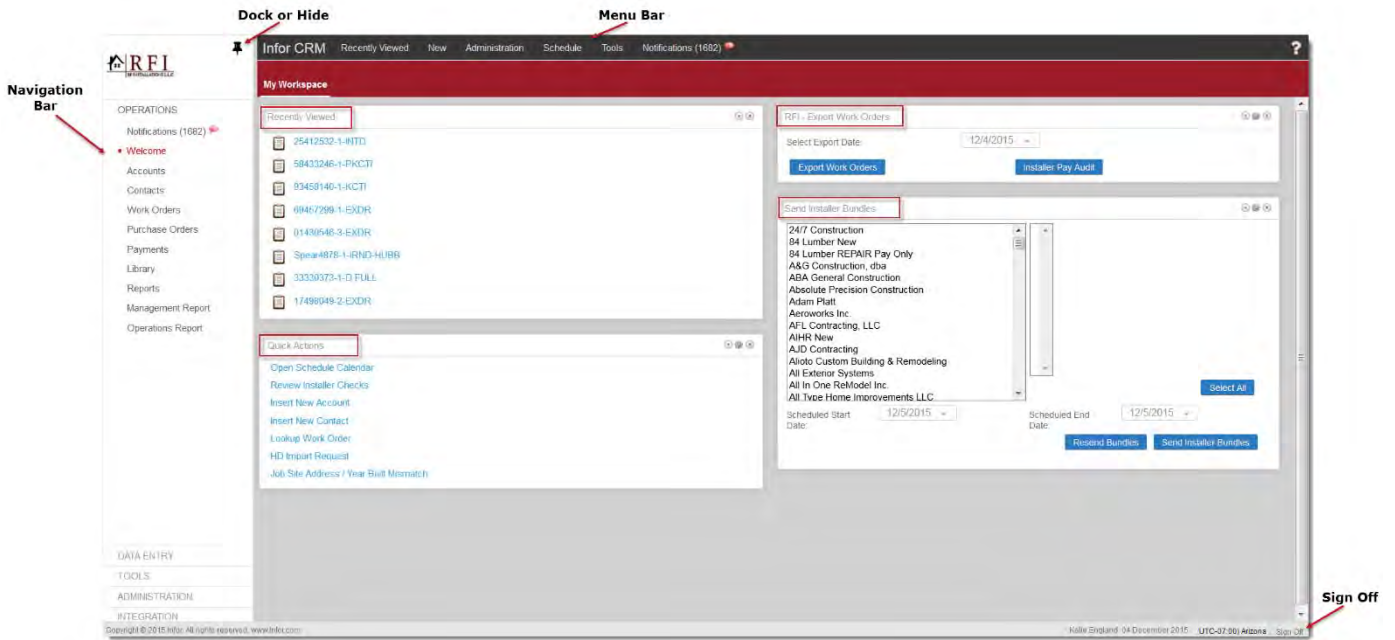
## My Workspace

When first opening Infor CRM you will see the Welcome page along with the basic layout. Under the tab called My Workspace you will have five sections:

1. Menu Bar
2. Navigation Bar
3. My Workspace
  - a. Recently Viewed
  - b. Quick Actions
  - c. Send Installer Bundles
  - d. Schedule Calendar
  - e. RFI – Export Work Orders

Element	Description
Menu Bar	This bar displays what title identifies the Recently Viewed Work Orders, New, Schedule, Tools and Notifications.
Navigation Bar	<p>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</p> <p>To dock the Navigation bar, so that it always appears, click the  icon. To hide the Navigation Bar, click the  icon.</p> <p>The Navigation bar can be docked or hidden. If you cannot see the Navigation Bar, click the  icon in upper left corner of your workspace.</p>
<b>My Workspace</b>	
Recently Viewed	<p>Every time you view a Work Order, the WO# will start populating under the <b>Links to recently viewed entities</b> section.</p> <p>This is an easy way for you to find work orders you have viewed during the day. Click on the hyperlink to open the work order.</p>

Quick Actions	Quick Actions is used as quick links to the most used actions, i.e., Open Schedule Calendar, Review Installer Checks, Insert a New Account or Contact, Lookup Work Order, etc.
RFI – Export Work Orders	This is where you will process Work Orders for payroll.
Send Installer Bundles	This is where you will send the <b>Installer Bundles</b> , which is described in detail later, in this document.



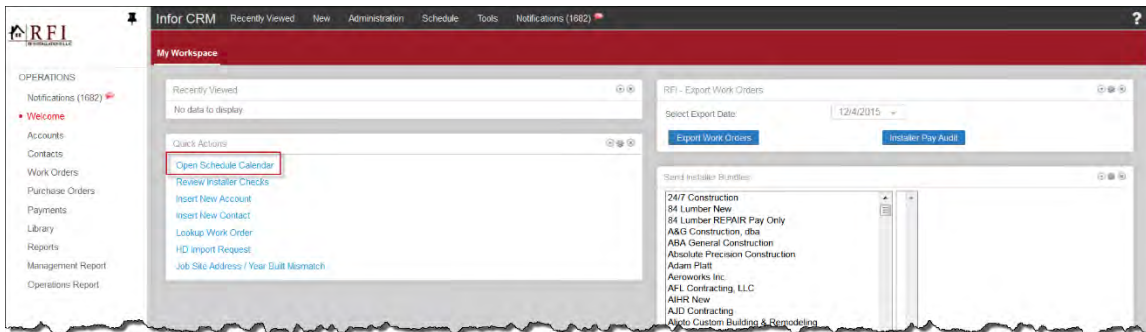


## View Installer Schedules

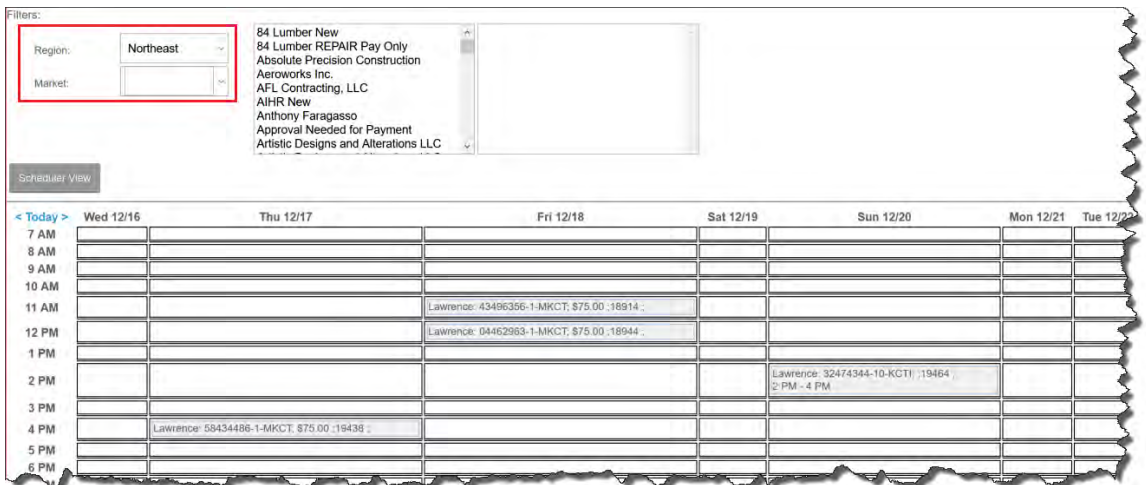
To view an installers schedule under Quick Actions:

1. Click on **Open Scheduler Calendar** on the Schedule Calendar widget on My Workspace.

The print preview will open in a new browser window allowing you to filter by Region and/or Market.

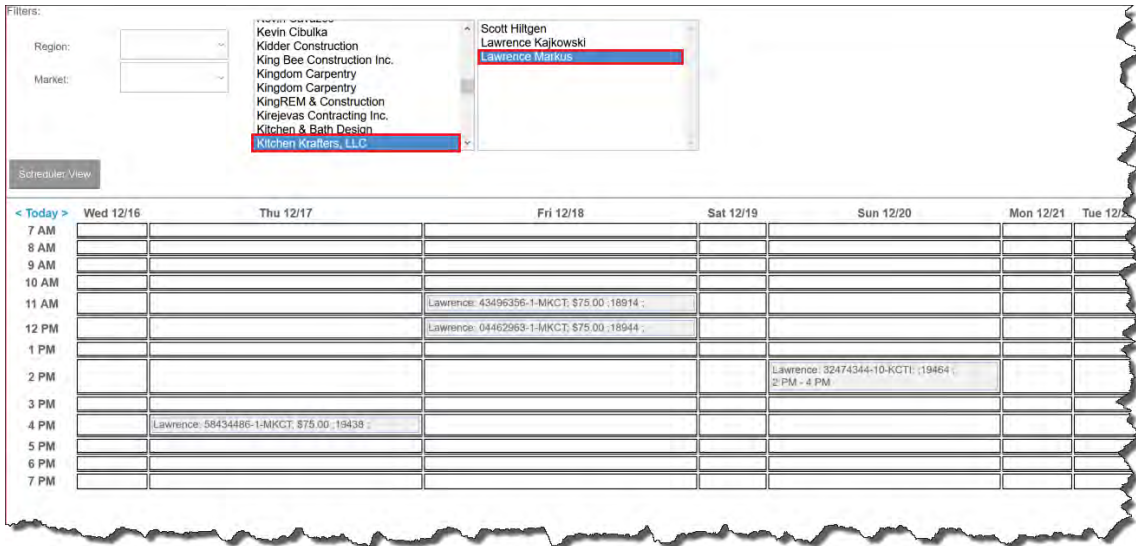


### Print Preview

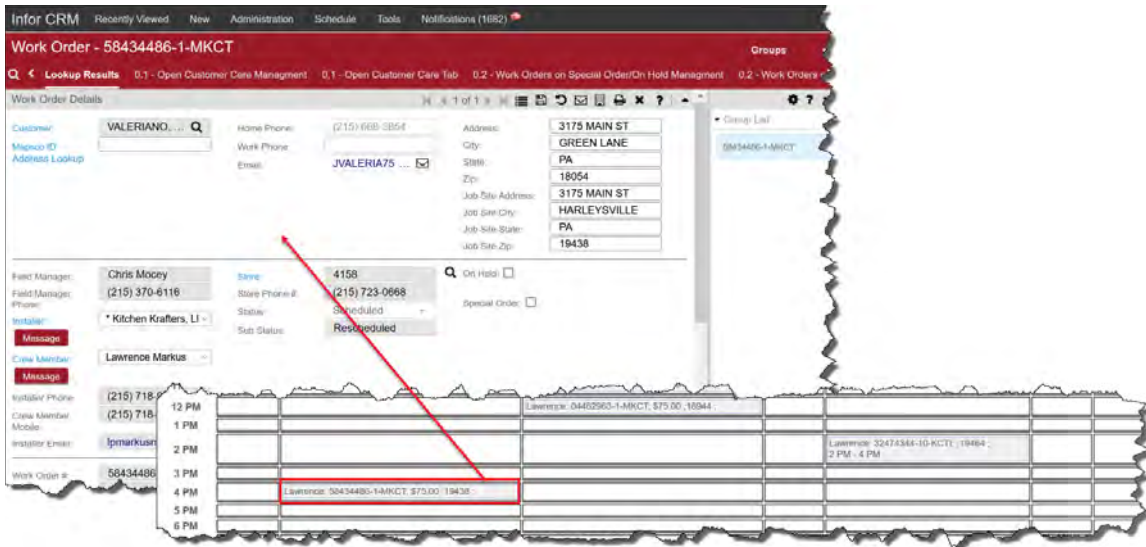


Clicking on an appointment will open to the Work Order.

2. Click on the **Scheduler View** to also filter Region, Market, Account and Installer.

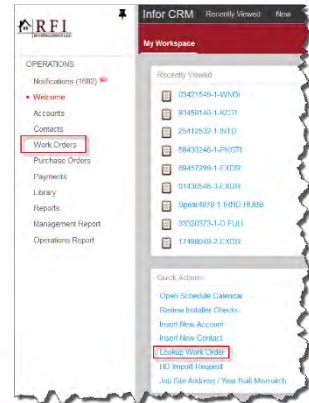


If you double-click on the appointment the work order will open.



## View a Work Order

From the Welcome screen, you can search for a Work Order by doing a **Lookup Work Order** if you have a work order #, etc. or view lists of work orders by clicking on **Work Orders** on the Navigation Bar.



**Ticket**

Lookup by: Work Order #    Contains    MEX    +

And: Zip Code    Starting With    75050    -

Search

To add more options for your Lookup, click on the + icon

You have options for your search, e.g., **Starting With, Contains**, etc.

This defaults to Starting With, but can be changed under **Tools | Options | General** tab.

## Group List Views

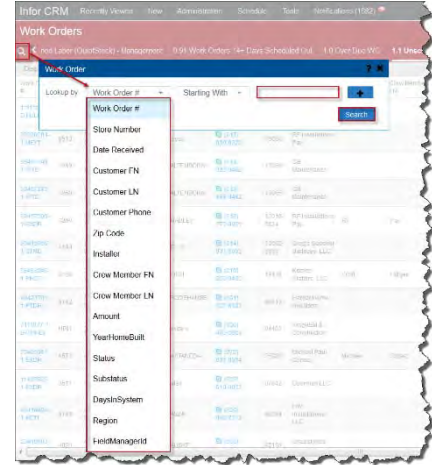
A screen will open with a series of lists.

- A group list will open allowing you to select the group you wish to view. You can click on each title at the top to find different lists or click on **Groups** to find a specific list.

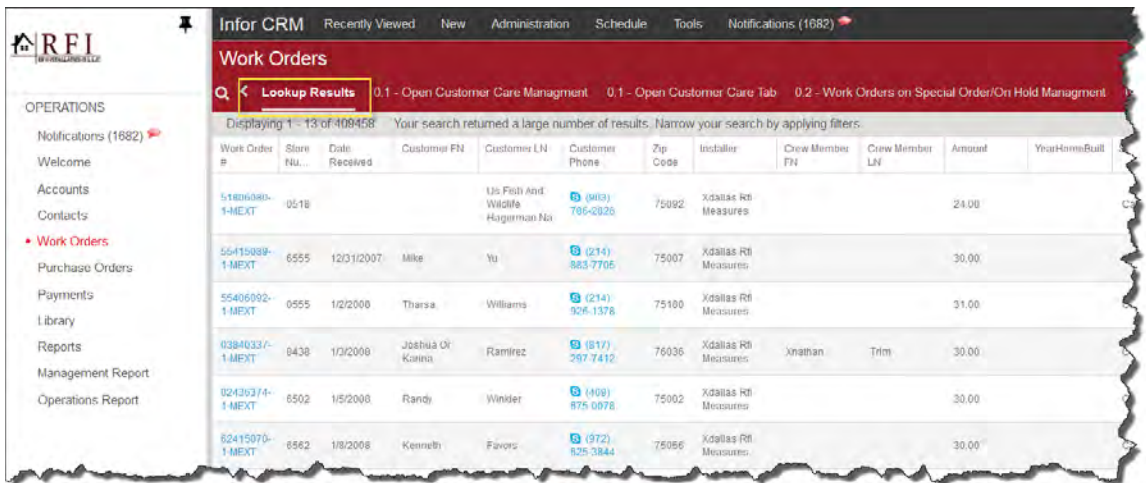
- From the group list view you can also find a work order by clicking on the **Lookup** button to open a lookup screen.

You can look up by Work Order #, Store Number, Date Received, Customer FN or LN, Phone, Crew Member, etc. Click the drop-down arrow and click on the type of look up, enter the name or number and click on **Search**.

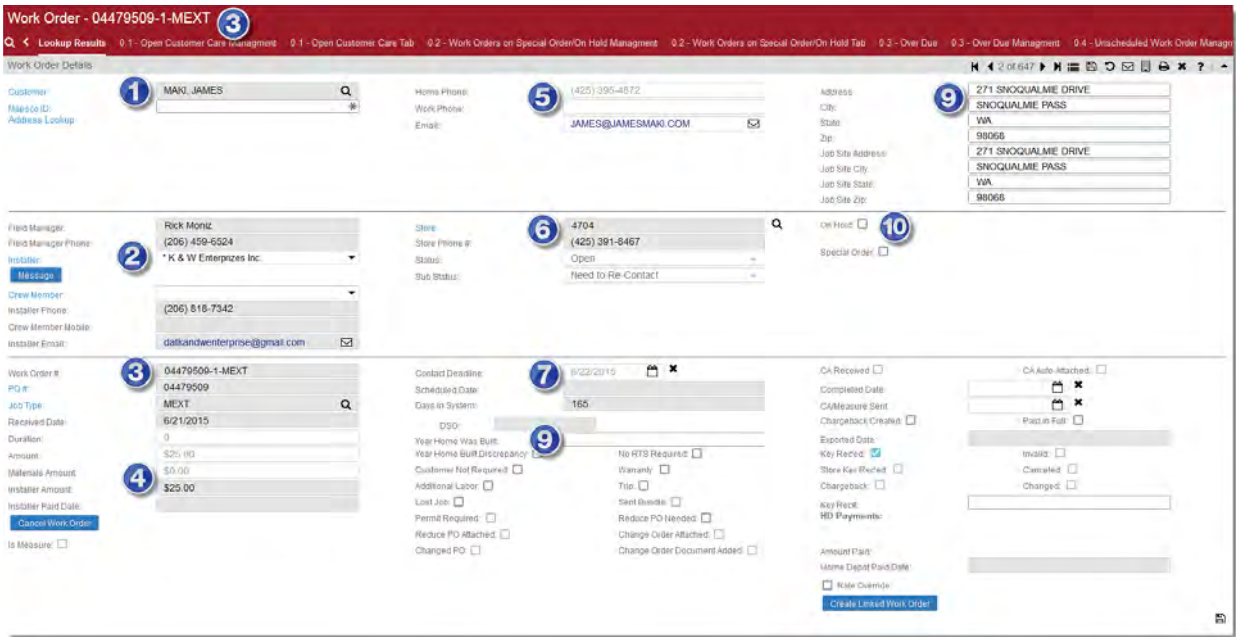
The results will show on the **Lookup Results** list.



- Once you click on a work order hyperlink the Work Order view will open. On this page you can find the details of the work order and a set of tabs across the middle of the page; Notes, Attachments, Related Work Orders, Products, and Activities.





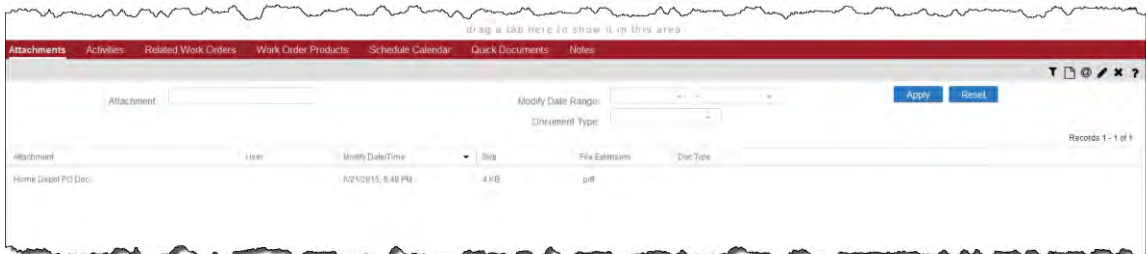


### Work Order Details

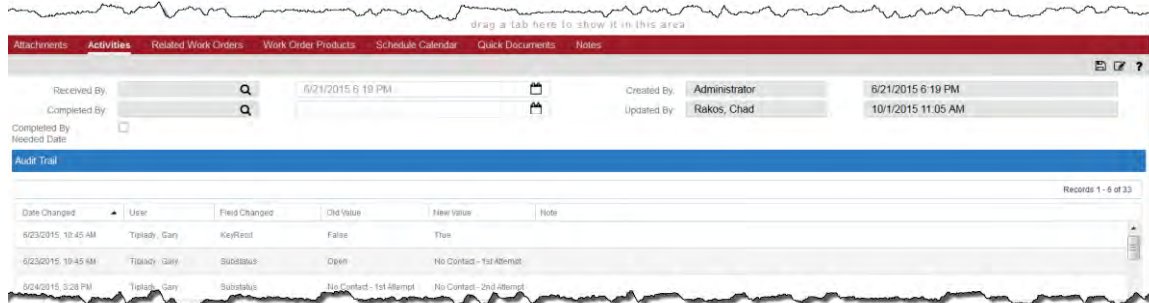
- |   |                              |    |                                     |
|---|------------------------------|----|-------------------------------------|
| 1 | Customer Name                | 6  | Store # & Phone                     |
| 2 | Installer & Crew Member      | 7  | Contact Deadline and Schedule Dates |
| 3 | Work Order #, PO# & Job Type | 8  | Year Home Built                     |
| 4 | Amounts                      | 9  | Address                             |
| 5 | Phone Numbers                | 10 | On Hold or Special Order            |

### Work Order Tabs

**Attachments** – On the Attachment tab you will be able to view and download to print all documents associated with the PO. This includes copies of the PO, measure sheet and lien waivers. Click on the name of the document to view or print in a PDF format.



**Activities** – This 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.



**Related Work Orders** – Allows you to view all related work orders, if any for the customer by clicking on the Work Order # hyperlink.

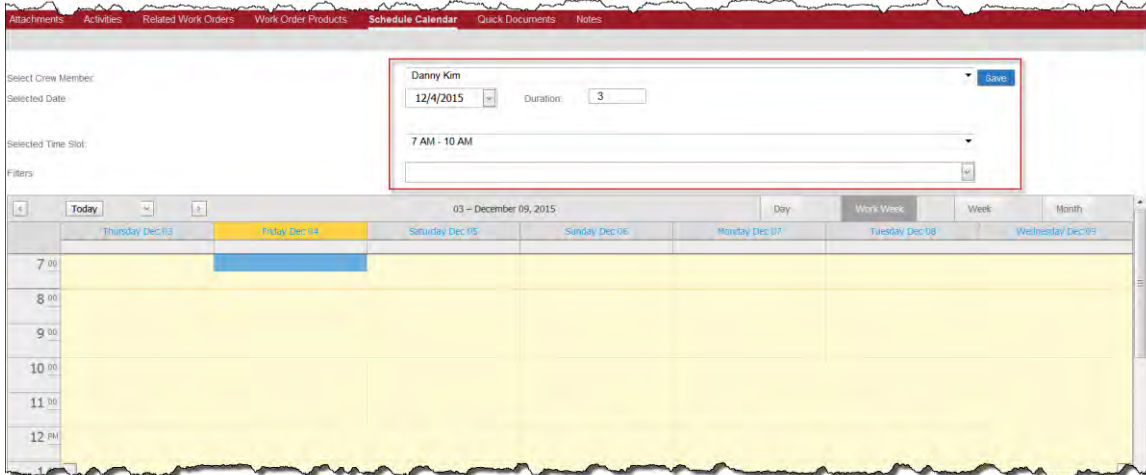


**Work Order Products** – a place to add the Product SKUs associated to the work order.



**Schedule Calendar** – by clicking on the Schedule button it brings up a calendar for you to schedule the installer.





**Quick Documents** – by clicking on one of the **Addition Documents** it will open the associated PDF document.



**Notes** – Allows you to enter comments about the work order. Add your note or comment and click on the **checkbox** and the note will automatically be sent and available to the Installers when they review the work order.





## **Faxing/Emailing to RFI**

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The fax number for this new system is also new; to send documents to RFI please use 866-577-1250 or you can email documents into the new system using email address [documents@rfinstallations.com](mailto:documents@rfinstallations.com)

## **Chargebacks**

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Please remember to check the notes on Infor for all updates/notification number. All Chargebacks will be completed within 14 days of receipt by RFI.

Store needs to send Chargebacks to... [chargebacks@rfinstallations.com](mailto:chargebacks@rfinstallations.com)

Fax 817-704-4543

Chargeback Questions... Directed to the Field Manager