What is Flat Rate Pricing?

**Why is Flat Rate good for the customer?**

Why is Flat Rate pricing good for the company?

Why is Flat Rate pricing good for me? (WIIFM)

What do we need to do to successfully implement Flat Rate?

Invoice Training Procedures

**Date:**

**To: All Service Department Team Members**

**From: General Manager/Service Manager**

**Subject: Processing Invoices**

In an effort to process ***all*** of our invoices efficiently and properly, and to obtain key information for future reference, it is absolutely necessary the following information is included on all of the invoices.

Legibly written:

1. Customer Number
2. Customer Name and Address
3. Customer Home and Work Phone Number
4. Bill to Number
5. Date of work performed
6. Service Technicians Number
7. Reason for Today’s Call
8. Type of Call
9. Dispatch, Arrival, and Completion Times
10. Equipment, Make, Model and Serial Number(s)
11. Work Performed (Check all boxes that apply)
12. Filter Type & Size
13. Description of Work Performed (as much legible information as possible)
14. Recommendations
15. Diagnostic Charge ($$$ Whatever amount is)
16. Quantity and Repairs made
17. Repair Code from Manual
18. Flat Rate Description
19. Flat Rate Price
20. Service Agreement Price
21. Other Price
22. Subtotal
23. Total Amount Due
24. Method of Payment
25. Service Agreement Savings
26. Customer’s Initials if they decline the Service Agreement Offer
27. Customer’s Signature Authorizing the Work to be Performed
28. Customer’s Signature
29. Service Technician’s Signature
30. PO # if Parts are ordered
31. Refrigerant Pounds Recovered
32. Refrigerant Pounds Installed
33. Customer Advised of Leaks
34. Quantity of Materials Used (back of white invoice)
35. Parts Procurement Code (back of white invoice)
36. Materials Description (back of white invoice)

Service Agreement

Conversion Procedures

**Date:**

**To: All Service Department Team Members**

**From: General Manager/Service Manager**

# Subject: Procedures for Performing Demand Service on non-SA customers

All service Technicians will use the following procedures when performing demand service on non-Service Agreement customers.

Remember our goal is to make your customer a Service Agreement customer!

1. Upon arrival to your customer’s home, diagnose the problem. Gather all the equipment and accessory information during the process.
2. Communicate to your customer the total cost of the repair, which is the diagnostic analysis charge plus the appropriate charges in the Flat Rate manual.
3. Obtain the customers written authorization on your invoice to proceed with the repairs.
4. When the repair has been completed completely fill out a Service Agreement with the single year, two and three year columns filled out. Remember to include all accessory items.
5. Use your Flat Rate manual to show the difference in charges for the repair for customers with the Service Agreement, and customers without a service agreement. Remember the SA prices are marked with the yellow highlighted column. Indicate the savings on your invoice.
6. Remember to explain all the advantages and benefits of a Service Agreement.
7. If your customer elects to purchase a Service Agreement after your presentation, you will proceed to perform a COMPLETE Precision Tune-up, Professional cleaning and safety inspection of their system(s). You will ***NOT*** substitute any service agreement inspections for a demand service call.
8. Call the office for any assistance you may need if you are not clear on how to calculate repair charges, or if the price for the repair is not in the Flat Rate manual.
9. Service agreement payments must be made in full. No partial payments.

Sell Service Agreements

**Date:**

**To: All Service Department Team Members**

**From: General Manager/Service Manager**

# Subject: 1. Procedures for Performing Clean & Checks

# Clean & Checks with Demand Service for non SA customers

All Service Technicians will use the following procedures when performing clean & checks, and clean & checks with demand service for non-service agreement customers.

**Remember our goal is to make your customer a Service Agreement Customer**!

**Utilize the Perfect Service Call Format!**

1. Upon arrival to your customer’s home, gather all equipment and accessory information during the clean and check. If there is a need for demand service also, diagnose the problem as well.
2. Communicate to your customer the total cost of the repair, which is the clean & check price only or if there is a repair needed, it will be the clean & check price plus the diagnostic fee, plus the appropriate “Preferred” charge for the repair from the Flat Rate manual.
3. Obtain the customers written authorization on your invoice to proceed with the repair.
4. When the clean & check/repair has been completed, completely fill out a service agreement with the one, two and three year columns filled out. Remember to include all accessory items.
5. Use your Flat Rate manual to show the difference in charges for the repair for customers with a Service agreement, and those without a Service Agreement. Remember SA prices are in the yellow highlighted column titled ULTIMATE SAVINGS in the flat rate manual.
6. Indicate the savings on the invoice in the box provided.
7. Remember to explain all the advantages and benefits of owning a Service Agreement.
8. Call the office for any assistance you may need if you are not clear on how to calculate repair charges, or if the price for the repair is not in the Flat Rate manual.
9. Service agreement payments must be made in full. No partial payments.

Sell Service Agreements