Use of Service Mate

2022

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2. INTRODUCTION

Service Mate (or SM8) is the Operations Management System (OMS) of choice of Fenix. It provides capabilities to accomplish quoting, invoicing, payment, scheduling, job management, communications (email, text, and phone) within the team as well as externally with customers, reporting, asset management and many more.

There is a wealth of text and video training on all aspects of the system, and it is not the purpose of this document to reproduce that excellent material. Instead, this document is intended to describe the use of the system as defined by Fenix and from the point of view of an iPhone user only (not a desktop user).

In this document, **staff** refers to Fenix cleaners, independent contractors, and the staff of independent contractors. While **Fenix** refers to Fenix management, supervisors, and the administrator of SM8.

3. SM8 EXISTING TRAINING MATERIAL

As mentioned above, there is no intention to reproduce training supplied by SM8, but to say it can be found on your iPhone as follows.

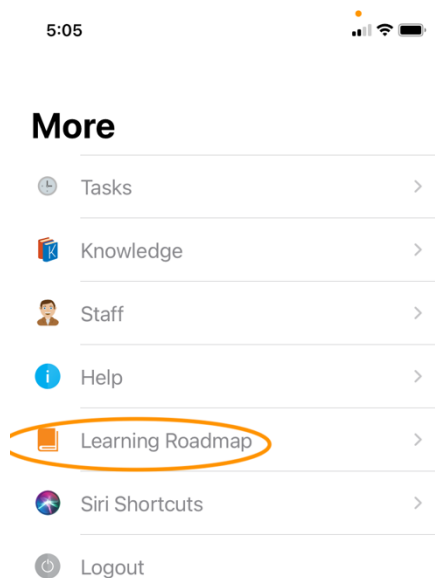Most of these lessons are videos and go for only a few minutes each. They are well worth watching.

Figure 1 - Location of Learning Roadmap

4. FENIX USE OF SERVICE MATE

In the rest of this document, we shall examine the following topics:

- Checking for Messages

- Sending Messages

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  - Badges

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5. CHECKING FOR MESSAGES

There are two places where you may find messages. The first is in the "Activity" feed and the second is in "Notifications".
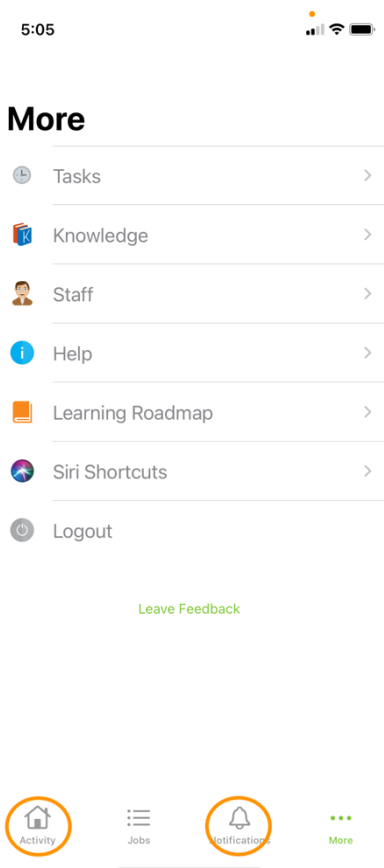

Figure 2 - Location of Message

The **Activity** feed is where anyone can post something that is sent to all users. This can be handy if you find a technique or product that works well and you wish to pass on to others, or you need a collective mind to help solve a problem "*Hey anyone know how to get paint off a venetian blind?*"

Fenix can also use this feed to keep staff up to date with news from the office "*Hi Team, please make sure your invoices are submitted by Wednesday night this week.*" as well as upcoming events such as a training afternoon.

It will be assumed by Fenix, if we post a message here it is read by all those with access to SM8.

The **Notification** will alert you to any reply to a sent text or email, change of conditions to a scheduled job, among other things.

In addition to the usual iPhone indicator showing the number of notifications awaiting your attention, there is an audible beep to alert you that a notification awaits.

6. SENDING MESSAGES

As with receiving messages, there are two places from where you may send messages, namely, the **Activity** feed and within a job.

The **Activity** feed was discussed in the previous section.

In a Job you can send messages from two places.

Send an email message by clicking on the envelope icon shown below and then complete the email message as per usual.

Alternatively, you can send a text message by clicking on the text bubble icon shown below and then complete the text as usual.

Both email and text icon are found in the menu at the bottom of the screen when you are in a Job.

Also, both emails and texts allow to use the pre-prepared templates when relevant. Check out the templates available using your own iPhone.
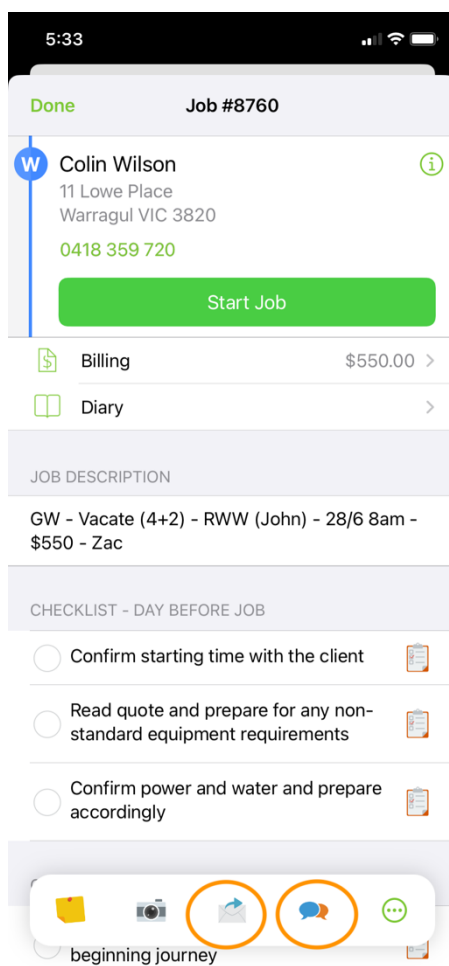

Figure 3 - Sending Messages

7. CHECKING YOUR JOBS

Checking Job Diary

When in a job, it's very easy to check the job diary by clicking on the word **Diary** – as shown in the Figure 4.

The result is shown in Figure 5.

From here you can see everything that has transpired on this job including every email and text message sent and received. When SM8 Phone is activated audio files of the phone calls as well as their transcriptions are included.

Most importantly from here you can open and read the full details of the quote which defines your job. For more details, see Figure 5 and refer to the next section.
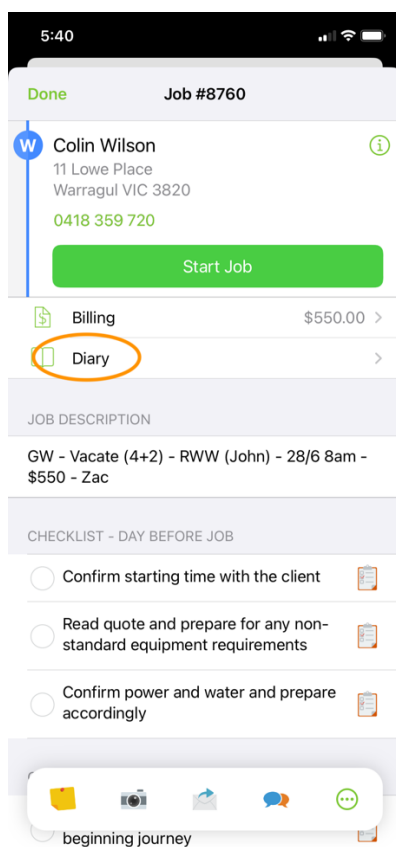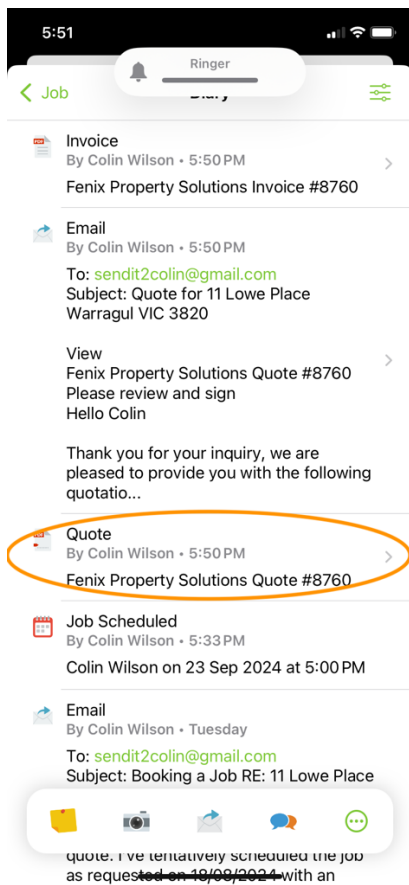

Figure 4 – Checking Job Diary

Figure 5 – Checking a Quote

Reading Quote

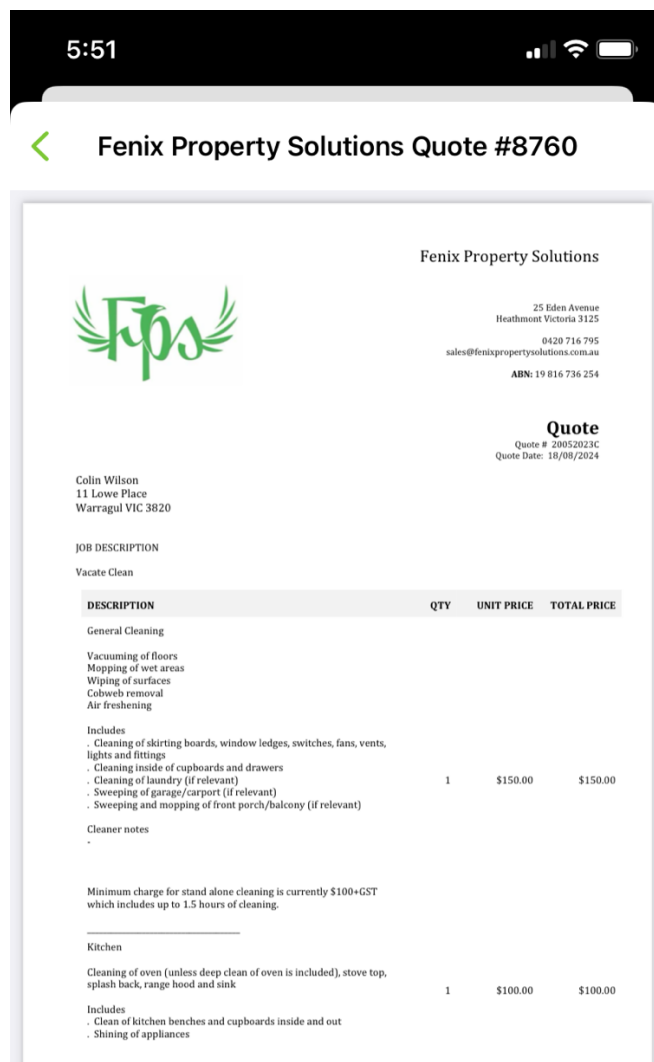In Figure 6 you can see the quote as seen on the iPhone.

Figure 6 – A Quote Viewed in iPhone

Knowledge

Looking at Figure 3, the 3-dot icon encircled in blue, takes you to an important screen where there is considerable information available. One item of which is the knowledge add-on. The knowledge add-on allows Fenix to provide information to those in the field, so this information is always at staff fingertips.

At the moment, you can only find three articles: 1/ a list of addresses for all of our agencies, 2/ pricing and operational details associated with fumigation and 3/ the mandatory Fenix inventory.

The number of articles will continue to grow as time permits including, techniques and tips and many other valuable resources. You will be alerted to new articles in the **Activity** feed and of course suggestions for useful articles are always welcome.
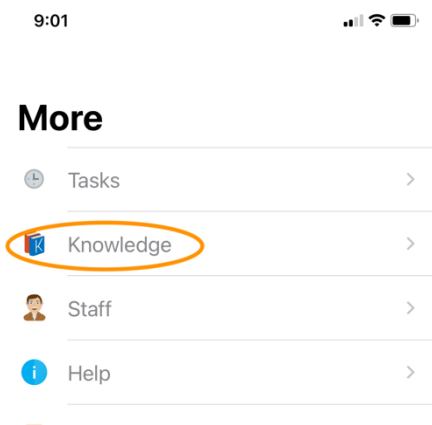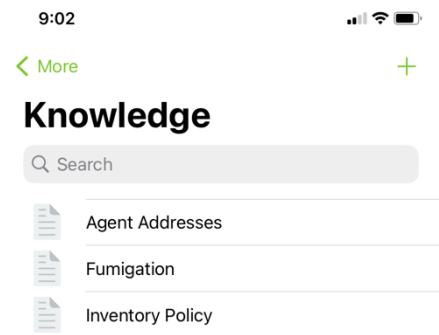
Figure 7 – Accessing Knowledge Database

Figure 8 – Knowledge Database

Please note the same little 3-dot icon is available when you're in a Job screen but it won't take you to the same place. To get to knowledge, you need to back out of the job you're in.

Badges

Badges are a quick way of Fenix alerting staff to particular characteristics of the particular job. There are many badges and fortunately, most of them are self-explanatory, such as shown in Figure 9.

There's a list of badges available on you iPhone, go to the bottom of the **Job** screen and you'll see a section called **Job Details**. The top item in **Job Details** is **Badges**. If you click on **Badges,** it will give you a list of all badges and their definitions.

In Figure 9, the badge VMMC is associated with Asset Management and shouldn't be of any interest to staff
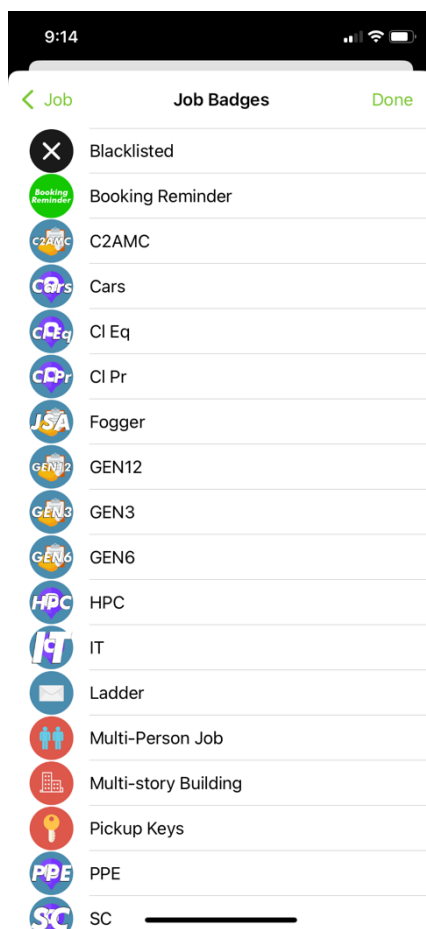
Figure 9 – Badges

8. STARTING A JOB

The most important part of this Information Document, is starting, managing, and finalising a job which is covered in this and the next two sections.

Starting a Job

From the **Jobs** screen you can choose to schedule today's jobs or check your overall schedule. Choose as you please.

My Schedule has been chosen as shown in Figure 11, to indicate jobs schedule for the future.

By clicking on the job shown, we view the details of the particular job.

As you leave your previous job, or leave home at the start of a shift, click on **Start Job**.
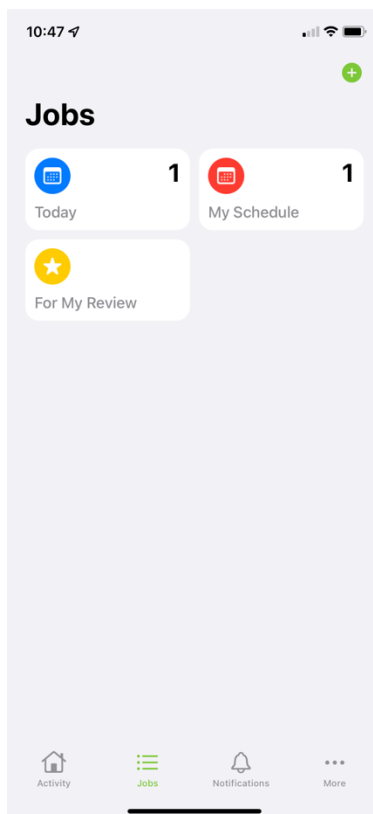
Figure 10 – Jobs Screen
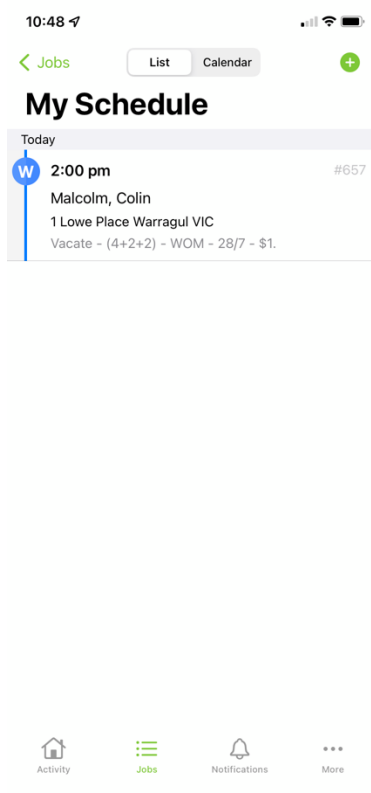
Figure 11 – My Schedule

Figure 12 – Starting a Job
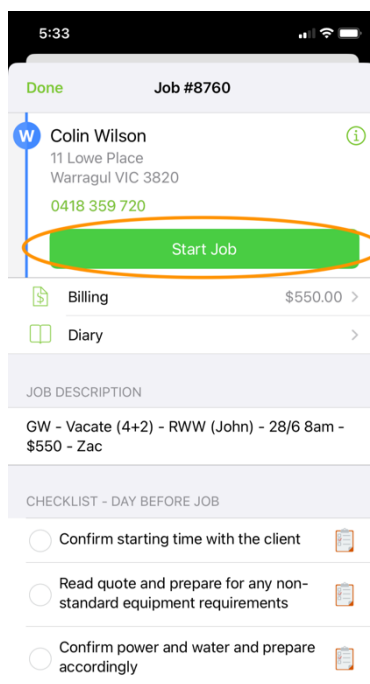
Navigating to a Job (or skip navigation)

After clicking **Start Job**, the next decision to be made is whether to navigate to the job or not. To navigate to the job is strongly recommended for two reasons. Firstly, all the feedback so far is that the navigate tool is very useful, and secondly, it enables the us to notify the client we are on the way, which will be discussed later.
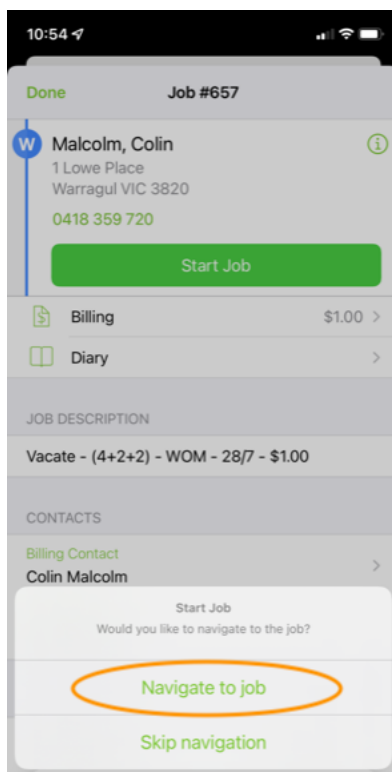
Figure 13 –Navigating to a Job

Notify Client (or do not notify)

Notifying the client is in some cases very meaningful and in other cases just plain silly. Let's look at an example of each case with its reasons.

<mark>To Notify Example</mark>

When you are doing a job for a private customer and they are going to meet you at the property to provide access, sending them a notification has the following possible advantages:

- If they have forgotten to meet you, or have forgotten the time of meeting, the message will help them get there on time thus saving you lost time

- If you're running a little late it helps keep the customer in the loop and a lot happier than waiting blindly without any contact

- Fenix is also in the loop and knows what's happening as all notifications are visible in the desktop version of the system

- Last but not least, it makes us look professional and impressive that we have such technology
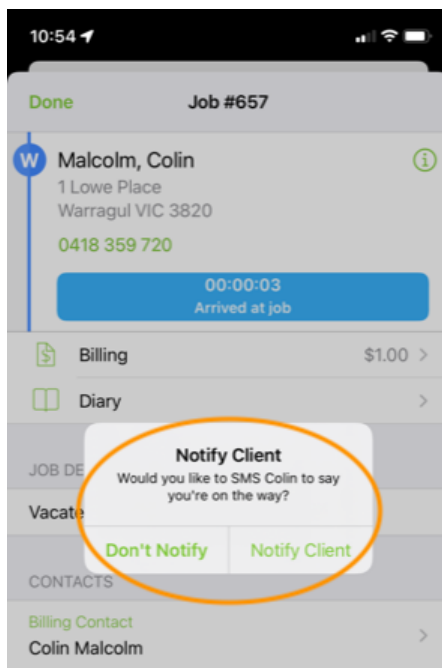
Figure 14 –Notifying a Client

NOT to Notify Example

When the job contact is an agent and the keys are at the office, there is no point in sending a message which may actually be more disruptive than useful. It serves no purpose so don't do it.
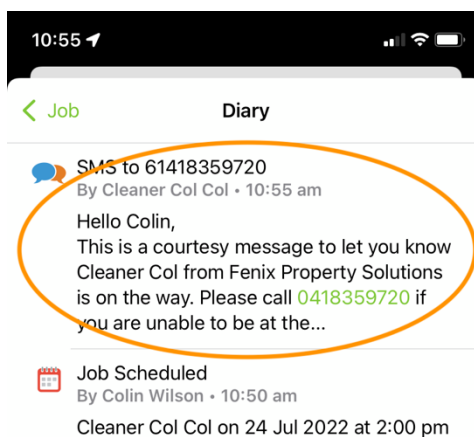
Figure 15 –Example of Notification Message

Checking in to a Job

On arriving at the job it's time to click the **Arrived at job** button to check in. **This turns off the travel timer and starts the job timer which can be very important** in some jobs, typically where we are charging on an hourly basis or where jobs are unquoted.

Once a staff member has checked into a job, it's possible to follow the job workflow by way of the **Job Description** and **Check List**, both discussed in the next section.

Also, the blue **Arrived at job** button turns into a red **Check Out** button, which will be clicked at the end of the job thus turning off the job timer.

Figure 16 –Arrived at Job
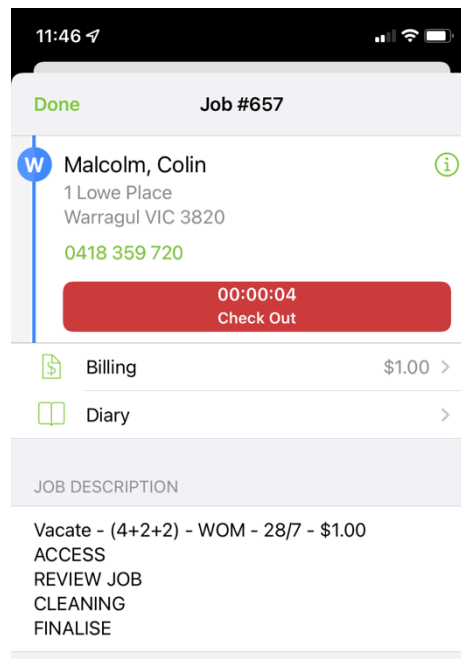
Figure 17 –Check Out Button

9. MANAGING A JOB

Background

To give a little background as to where the terms **Job Description** and **Checklist** fit into the plan, the picture shown in Figure 18, which is a screen shot from the desktop system.
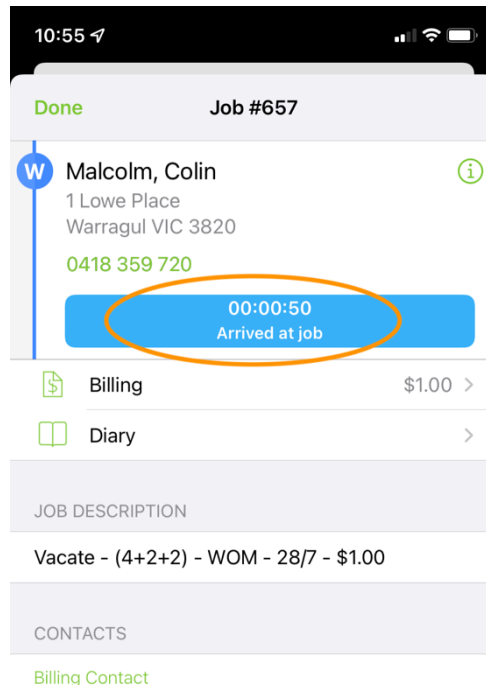
In the area of the screenshot called **Description**, Fenix copies a standardised list of items. The items preceded by a hyphen and space "- " become the **Checklist** items on the iPhone view and the items without a hyphen become the **Job Description** on the iPhone view.

Also note the use of Badges to show this is a VIP customer, it's a two-person job and you'll need to collect keys for access.

Figure 18 –Job Description and Checklist

Job Description

The first item in the Job Description is rich in information and is the same syntax for every job. The information elements separated by hyphens are:

- The initials of the quoter
- Job type e.g. Vacate, Presale

- (3+2+2) equates to bedrooms+bathrooms+carspaces

- Marketing e.g. Word of Mouth (WOM) or BSGW (Ryan)
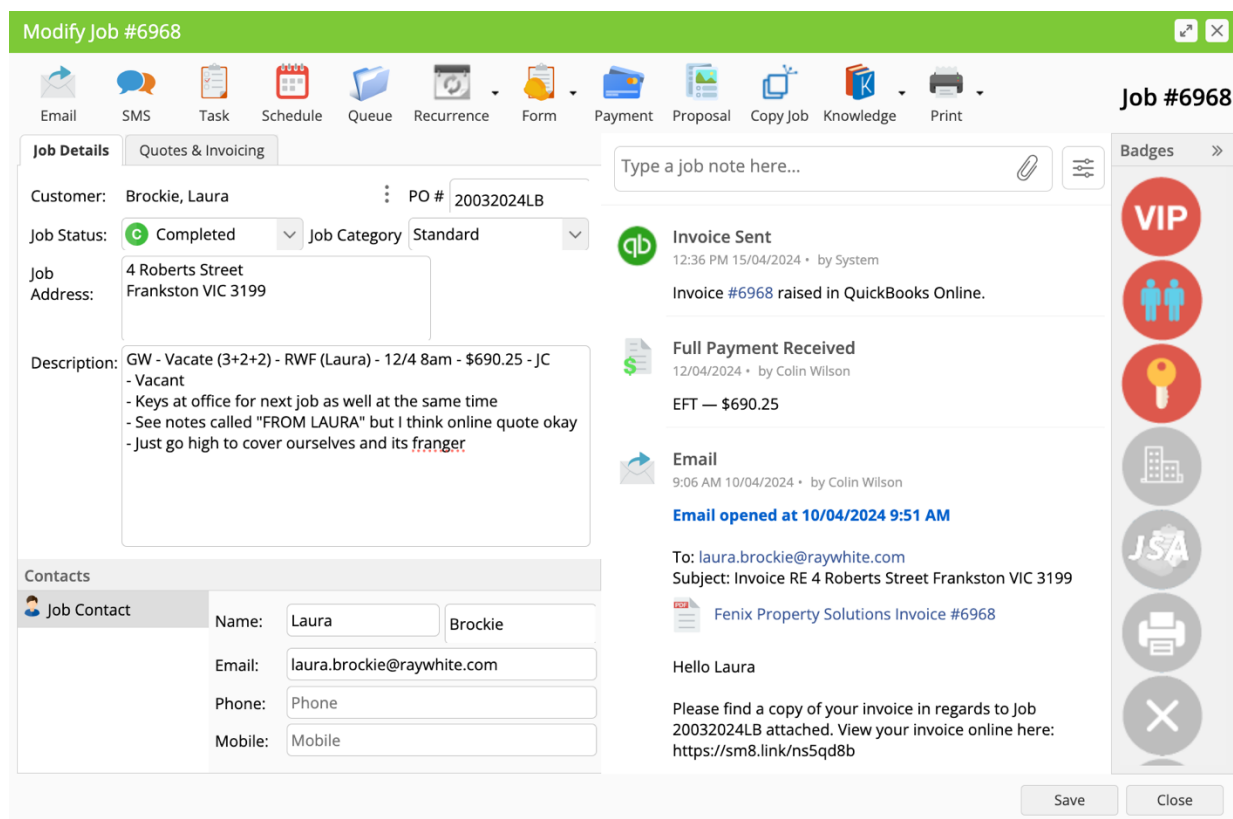
- Date of job e.g. 24/8 and time e.g. 8am

- Amount of quote e.g. $396.00 the amount the IC should invoice Fenix

- Not always included but when it is, it's the IC team who did the job

Checklist

The checklist is intended to be the job workflow and if every item in the checklist is completed correctly the true value of SM8 can be enjoyed.

Sometimes Fenix put additional items in the checklist. This is usually done as a reminder because the item is generally being missed or not well done. Hopefully as everyone gets more experienced with the Fenix workflow, we can remove more and more items from the checklist, so it becomes a minimalist list.

After copying this list into the job in SM8, it is then minimised as much as possible depending on who is the assigned to, and the circumstances of, the job.

We ask the following of all staff please, regarding all of the items in the checklist:

- Consider every item as important to someone in the team 🤝

- Do not assume every job is just the same as every other, causing you neglect the Fenix hymn sheet in favour of your own hymn sheet 🎶

- DO NOT tick an item not carried out – it's sacrilege 😠

- When an item calls for a note – make a note 🙏

- When you make a note put yourself in the readers shoes – does my note make sense? is there enough context? is it sufficiently complete? 🤯

- The advantage for Fenix is we can manage the job from the notes without having to bother you and there is a good record which will remain long after we've all forgotten the minute details 😇

- The advantage for the staff member is we can manage the job from the notes without having to bother you – especially invoicing 🤤

- If you decide not to complete an item and therefore not tick it, make a note explaining why 🍩

- The success of this is dependent on everyone's cooperation and goodwill but the benefits are there for us all 💲

> **Note**
> 12:39 PM 24/07/2022 • by Cleaner Col Col
>
> Job came up good. Big black mark on wall in lounge can't be removed b/c paint is textured and old. Marks on cooktop are rust not dirt. Streaks on LHS o/h cupboards in laundry is damage in laminate not dirt. Sliding glass door lock jams.

Figure 19 –A Good Note

Quoting an Unquoted Job

Quite often a trusted agent will pass a job to Fenix with very little definition. They may simply say "… please carry out a full vacate and steam at … as soon as you can … let me know approx. cost on arrival…let me know when you can attend."

In such a case it is the responsibility of the staff member attending to provide an estimate on arrival generally under the usual headings of General, Kitchen, Bathroom, Windows, Walls, Steam, Rubbish or as seen as relevant.

This information can be readily relayed by Fenix to the customer should they have asked for it.

Upselling a Quoted Job

Another area where we often come to odds with the customer but need not do so is in not advising when something needs to be done but hasn't been quoted, even though a quote was supplied.

As a little background: Whenever a customer, public and agency, asks for a quote we send them a standard list of questions – see Annex 2. Sometimes the answers are not exactly as we find the situation on arrival.

Example 1, in the questionnaire, they customer claims they have 4 areas of carpet to be steam cleaned, 2 bedrooms, loungeroom and stairs. They fail to mention however that the lounge is actually a lounge/dining with an area of almost 30m^2. They also fail to mention the landing/hallway at the top of the stairs the equivalent of 1 area at the very least. In this case if we raise this issue at the start of the clean (not the end of it) we can get agreement to charge for 6 areas instead of 4.

> **Note**
> 2:58 PM 30/06/2022 • by Stuart
>
> General clean 1.5hrs
> Bathroom and separate toilet 1.hr
> Kitchen clean 1.hr
> Spot removal walls and doors 1.hr
> Clean windows 1.hr
> = $247.50
> Proff steam clean 4 areas 2
> bedrooms landing/hallway and stairs
> = $132.60

Figure 20 – An Unquoted Job Quote

Example 2, customer says walls don't need cleaning but on arrival you can see they clearly do need cleaning to satisfy the agent at the final inspection. By contacting Fenix and letting us know (even more persuasive if there are some photos) there is at least 1.5 hour required to spot clean the walls. We have the responsibility, to tell the customer and/or their agent that they require 1.5 hours wall spot cleaning to get their bond back. If we don't do this, we'll be recalled anyway to do the walls and since we're going back anyway, they'll find other redo-like items to be completed. Better to get it done at the same time as the original job. It also makes us look like we know our stuff.

We should stress at this point that if there are a few marks on the walls, marks that can be removed in under 15 minutes and will make a significant difference to the job, then it should be considered to be part of General. We don't include the words under General as it may dissuade customers from paying for a wall clean. The limit though is a soft 15 minutes. If it is likely to genuinely take longer than 15 minutes, we owe it to the customer to give them a chance to pay for the wall clean rather than blindly not do so.

If you put such a note in SM8 please use one of the communication methods to advise the office that you just noted an upsell. Otherwise, we may not see it until too late. With upsells, time is of the essence.

Photos (and tags)

Unfortunately in SM8, all photos for a particular job wind up in the same folder, they are date and time stamped but it is still difficult to easily sort out before and after photos when called for by the customer. Fortunately, there is a capability in SM8 to allow the user to tag photos. We suggest you set up SM8 on your iPhone to have the following tags and to use them on every job:

- **Before** –keep these to a small number (maybe 6-8) focusing on areas that are particularly dirty or troublesome
- **After** – try to repeat the before photos as well as anything else of relevance
- **Damage Before** – if you don't take a before photo of damage, rightly or wrongly, you set yourself up as a suspect
- **Damage After** – this is to show any damage you caused – come on, fess up
- **Gallery** – any photo or before and after pair of photos you think worthy of a spot in history
- **Steam** – when your steam cleaning is carried out by a third party
- **Key** – for where you collect the key from or where you leave the key after you have finished the job
- **Business Card** – to show you left one of Glen's business cards on the kitchen bench

Notating a Job

This has been said many times and people are probably tired of hearing it, but it's importance can't be overstressed, <u>complete your job notes</u>. Too many better than too few. Write them from the intended audience point of view.

Get into the habit of putting everything in SM8. If you pause for lunch put it in SM8. If you need to complete the job the next day, put it in SM8. If the customer said something we should know about put it in SM8. If you broke something put it in SM8. If you're worried about something, put it in SM8.

10.   FINALISING A JOB

Actual Hours Note

It is easy to copy and paste your estimated hours note into the actual hours note provided at the end of the job, or, in the actuals note just state "*Inv as per Est*" which is the same as saying "Fenix please invoice as per the estimate because it didn't change."

Final Notes

As you check out of every job, make a brief note alerting Fenix to anything that was done particularly well, anything that wouldn't come up or anything else of relevance. You don't however, need to give a blow by blow of everything you cleaned.

It really does help. When we send an invoice, we can send some or all of the job notes to the customer, and to this date, we've never been asked to redo something where we've pointed out the issues in advance. It just makes so much sense and a lot quicker for you to make a brief not then attend a redo.

Refer to Figure 19 for an example of a good note, they really do help avoid a redo.

Last point on notes: Providing a multitude of notes saying this couldn't be cleaned or that couldn't be cleaned is no excuse for lazy or poor cleaning skills. If you can't get it clean we should be very confident that no one else will be able to get it cleaned in a redo.

Sending Completion Message to Customer

Exactly the same logic applies here as applied to Notify Client message at the start of the job.

As mentioned in an early section called Sending a Message, you can send the customer a text at any time, but it is important that you send one at the end of the job. In the sending a text option, there are various templates to choose from and you should pick the template named **Job Completed**. This will send the following message to the customer. You wouldn't believe how many customers email the office and ask "…*is the job finished yet, how did it go*?"
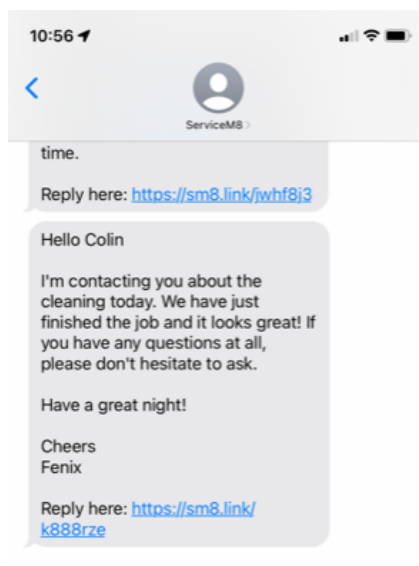
Figure 21 – Completion Message

Ending a Job

At the end of the job it's time to **Check Out**. This ends the SM8 internal timer on Job Time and Starts it on Administration Time.
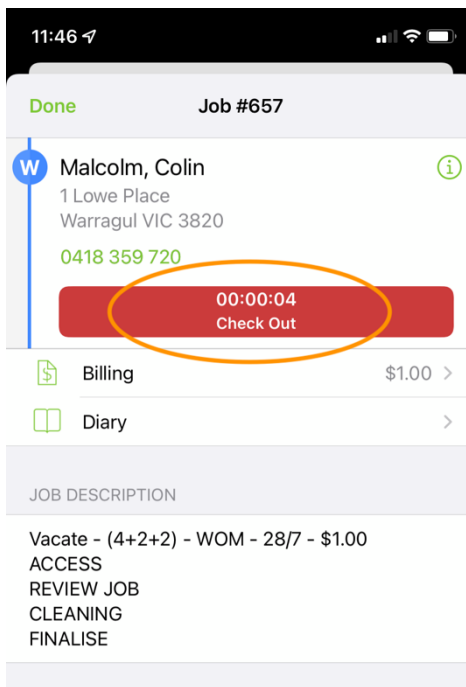

Figure 22 – Checking Out of a Job

After checking out of the job you will be presented with two options. Is the **Job Complete** (complete and ready to be invoiced) or job **Not Complete** (something else needs to be done), either the same staff member must return to complete extra work, such as approved extra walls,

as there is insufficient time at this visit, or, a different person is required such as a heavy-duty steam cleaner is required.

If the job is not completed and you click "Not Completed" you will be presented with the options shown in Figure 23.
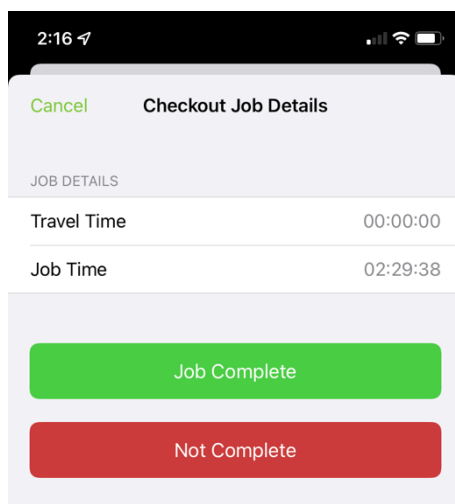

Figure 23 – Job Complete or Not

It is our recommendation that you click on **Need more time on site** where you'll be taken to a choice of queue to which you should assign the job.

It is our recommendation that you click on **4 Awaiting Scheduling** where the job will be assigned accordingly by Fenix. This, in conjunction with an effective Final Note, will enable Fenix to manage the job appropriately.
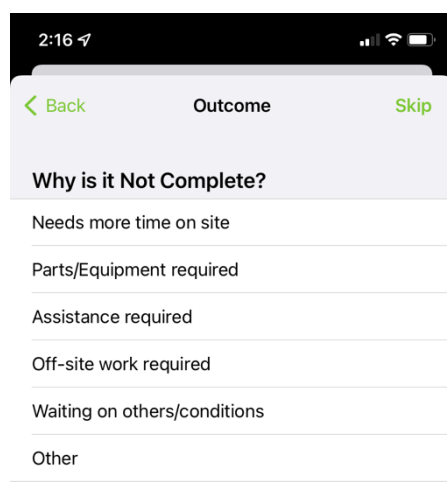

Figure 24 – Managing an Incomplete Job

If the job is completed and you click **Job Complete** you will be presented with the place to make a final comment as per previously discussed. Please make a comment here and do not **Skip** this option.

Whether or not you share it in the activity feed is your own decision but generally it should not be necessary.
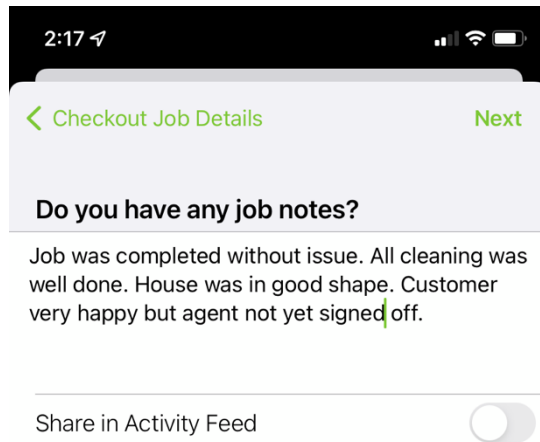

Figure 25 – Final Job Notes

At this stage you will be taken to the billing page. When presented with the page in Figure 26, simply click on "Invoice" and you will be taken to Figure 27
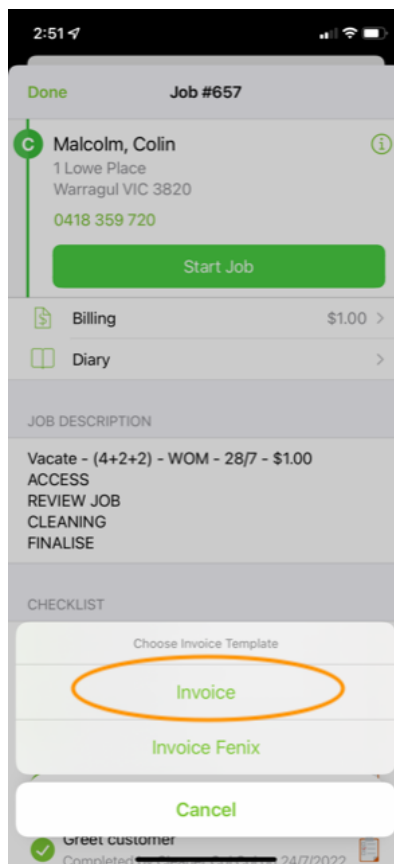

Figure 26 – Choosing to Invoice

In Figure 27, you have the option of adding or deleting items or changing their value. To do so however requires a justifiable reason and appropriate agreements/approvals.
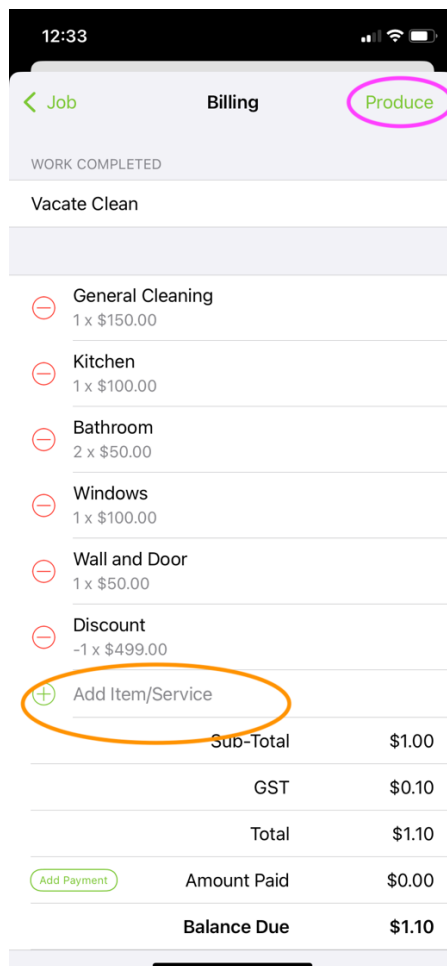

Figure 27 – Modifying the Invoice

When you're happy with the invoice, click "Produce" to produce an invoice to be sent to the customer for payment.

After clicking on "Produce" you will be taken to a screen as shown in Figure 28. Right at the bottom of this screen gives the options for sending the invoice. The envelope on the left is for sending by email (preferred). The text bubble in the centre is for sending by text. The up arrow on the right gives more options for sending, these are not likely to be required by an IC.

Arguably the most important thing after getting the invoice items and values correct is removing the checklist. As you do the job and tick the checklist items, SM8 automatically populates the checklist items into the "Work Complete" section which is automatically sent with the invoice. These checklist items **MUST** be removed before sending the invoice. **Some of these items may be quite inappropriate for the customer to see.** Everything within the orange border in Figure 29 must be deleted so you have what is shown in Figure 30. This now ready for sending to the customer so click on "Save".

After clicking "Save" you'll be taken to the screen in Figure 31. This screen shows the email template which you are about to send to the customer. It shouldn't require any amendment but if it does, this is the opportunity. When satisfied with the email, click on "Send" to send the final invoice to the customer.
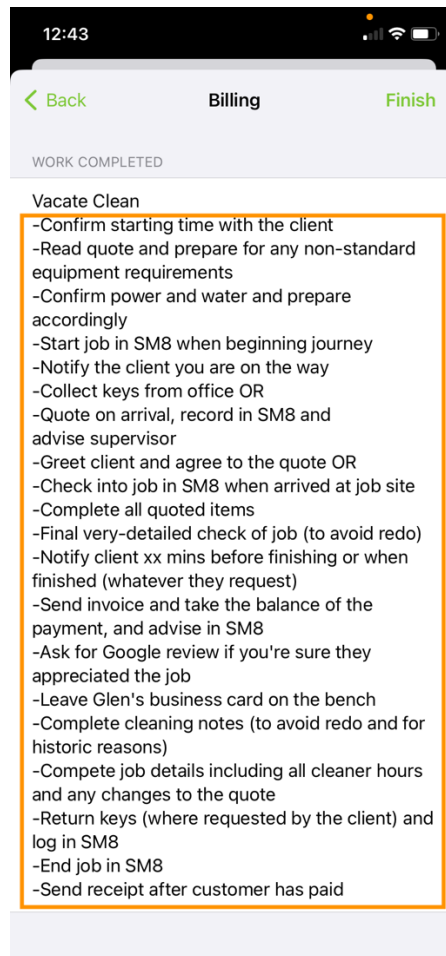

Figure 28 – The Invoice

Figure 29 – Checklist MUST be Deleted

After you send the invoice, what arrives in the customer's email, is shown in Figure 32. As you can see there is a "Pay Now" button which allows the customer to pay by credit card (orange ellipse in Figure 33) or by using the smart phone payment system (purple ellipse in Figure 33), in this example "Apple Pay".

There is of course a small fee to use either of these services. This is what appears as an item in the customer's invoice when they choose to pay be credit card: "Credit Card Processing Fee 1.9%".

This fee goes to the credit card processing "Stripe" and not to Fenix, so it **MUST NOT** be included in the IC fortnightly invoice.

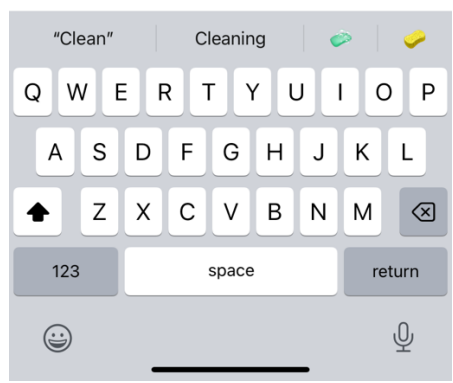When the customer clicks "Pay Now" they get the screen as shown in Figure 33.
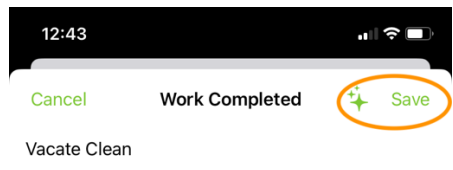
Fenix Property Solutions

Figure 30 – With Checklist Deleted

Fenix Property Solutions

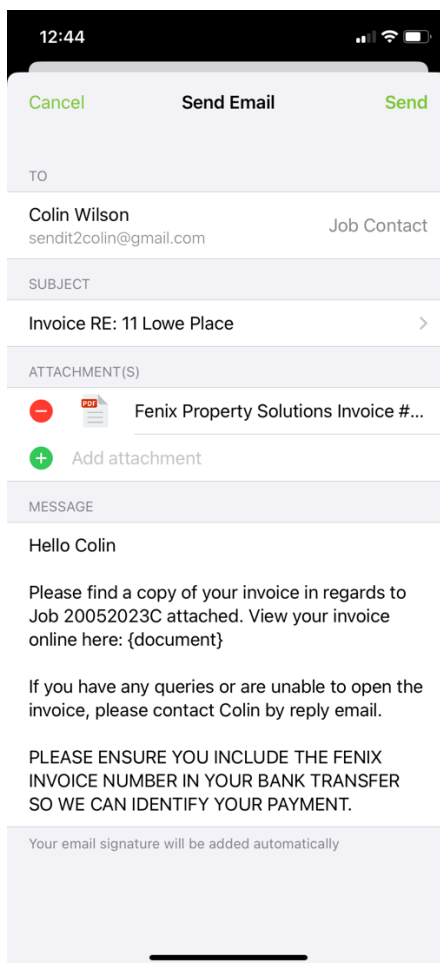*Figure 31 – Invoice Email Template*
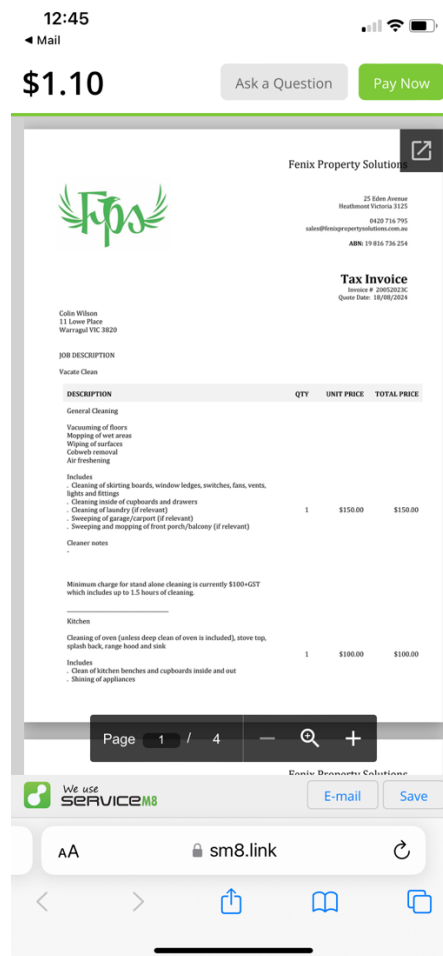
Figure 31 – Invoice Email Template

Figure 32 – Customer's Invoice

11.   CASH PAYMENTS

Occasionally, but not often, you will be requested to collect cash for a job. In such cases please ensure the following:

- You count the cash to confirm its correct
- You register the cash in a SM8 note including a photo
- You store the cash securely and deposit it to the Fenix bank account at the earliest convenient moment
- You send the customer a text of receipt

12.   OTHER PAYMENTS

To minimise unpaid invoices and the amount of time it takes to chase up slow payers, we try to get as much payment as possible before the job, and the customer's agreement to be prepared to

pay the balance immediately on the completion of the job. It is the responsibility of each staff member to assist us in this matter by urging the customer for payment at the end of the job in those cases where one of the following statements appear in the checklist:

- - Receive cash
- - View payment screenshot
- - Take payment on iPhone

We've already discussed the cash and credit card situations.

The other case refers to electronic funds transfer to the Fenix bank account. This may be made by the customer who should then provide a screen shot to the staff member demonstrating the amount paid which should match the balance of the invoice. If this does not happen the staff member should contact Fenix immediately (while still with the customer).

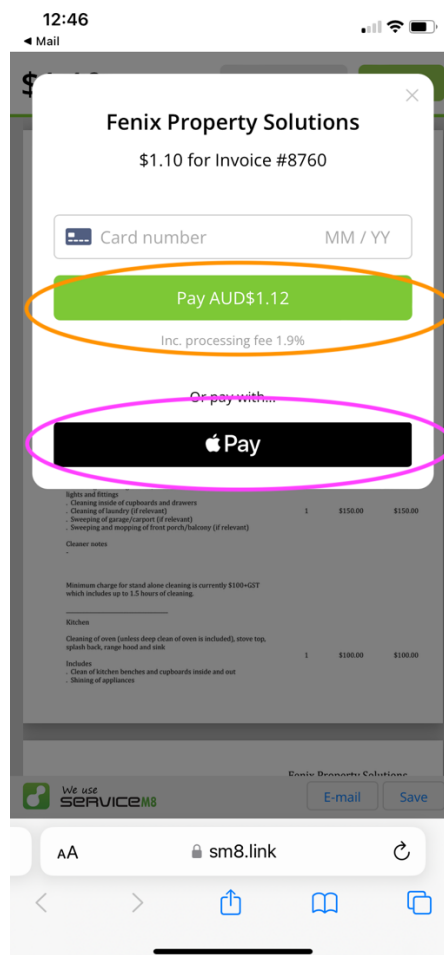Further information is available in T3 Basic Training - Taking Payments on Your iPhone.

Figure 33 – Customer's Pay Invoice Screen

> Payment may be made to:
>
> **Fenix Property Solutions Pty Ltd ATF The Fenix Unit Trust**
>
> **BSB: 063-199**
>
> **Account: 1048 2277**
>
> **Payment Reference: Quote Number**

13.   ANNEX – STANDARD PRE-QUOTE QUESTIONS

Hello <First Name>

Thank you for the enquiry.

If you don't mind, there are a couple of quick questions which will enable us to prepare and email you a quote.

1. What type of clean do you require e.g., End of Lease, Presale, Move-in, Settlement, Regular?

2. What is your full name.

3. What is the property full address.

4. What date do you require the cleaning to be done? Preference 1... 2... 3... .

5. Does the oven require a deep clean?

6. Do the walls need to be spot cleaned, full wash or no cleaning?

7. Do we need to clean pet hairs from anywhere in the property?

8. How many areas are carpeted (an area is an average bedroom size)?

9. Are there any stains to be removed from the carpet? Please describe.

10. We dust curtains and blinds but if more detailed cleaning is required, please advise.

11. What would you say is the condition of the property ranging from **10** very good to **1** very bad?

12. Will the power and water be available?

13. Are there any other important things I should be aware of?

14. How did you hear about Fenix?

15. If real estate agent please specify Agency and Property Manager.

I should be able to email you the quote after I have these details.

Thank you for contacting Fenix.