CSR Training & Operations Manual

The call, the booking, the day, the follow-up — one manual for the office team

For: the CSR team (Barbara, PJ, Kris), Tim, and Ingrid. This manual merges the office's training files into one document: the four phone-script versions, the Fixed Price Implementation Playbook (Office), CSR Tasks, Orientation for New CSR, Jobs and Questions to Ask, the SwipeSimple payment procedure, and the referral partner list — plus the processes added in October 2026 (sub-out escalation, the CSR daily briefing, the incentive plan guardrails). Where the older files disagreed, this manual carries one version. Last updated: October 22, 2026.

HOW TO USE THIS MANUAL: Work in order. Section 1 is the new-hire path. Section 2 is the call — the boxed modules are word-for-word say-lines; stay in the box you are in and use the branches only when the call goes there. Sections 3–4 are open on your desk while you book. Sections 5–7 are the daily, weekly, and after-the-job rhythm. Section 8 is what to do when a call is not a normal booking.

THREE NUMBERS TO NEVER MIX UP: The $88 is the CONSULTATION FEE (waived when the customer goes forward the same day — Section 2, Module D). Ballparks are given ONLY at the Final Objection, and ONLY ONE number (Section 2, Branch 2). If a job is not ours or not in our territory, do not guess — use the zip map and the referral list (Appendices).

Section 1 — Start Here: Your First Two Weeks

Training sits with a trainer the whole first week: the trainer teaches and shows, you watch and take notes. Week 2 you drive — you do the work, the trainer sits with you, and you ask for help whenever you need it. By the end of Week 2 we set goals together for Weeks 3 and 4 and meet weekly to celebrate what is working and adjust what is not.

Week 1 — watch, learn, take notes

☐ Sure Start Phase 2 — Role of the CSR video, plus new-hire paperwork.

☐ MRH Client Service Session 1. Local notes: we do not usually use “hold.” Text and email confirmations are sent automatically by ServiceTitan.

☐ Go over the skills of each Service Professional (who is strong at what), the territory map, the zip codes we serve, and the referral partners (Appendix A).

☐ MRH Client Service Session 2 — the phone script (Section 2 of this manual). Skipped from the videos: phone estimates and labor ranges / budgeting — phone estimating has its own process (Section 8) and ballparks live only in Branch 2.

☐ MRH Client Service Session 3 — ServiceTitan Office basics, with our local rules: (a) we dismiss the lead and put it in Follow Up, then call and text from Follow Up; (b) leads are booked under the consultation/estimate job type; (c) we use the Dispatch Board, not the schedule dashboard; (d) accounts receivable belongs to the office manager; (e) marketing and task-management videos are skipped.

☐ Check receipts against technician invoices; what matches, what does not, and who fixes it.

☐ Happy Calls: call the client, enter the survey — or, if you cannot reach them, note it and pin it until you hear back.

☐ Unhappy customers: pause the review request (Broadly) before a bad review lands, and get Tim or Ingrid involved (Section 7).

☐ The price book and the intake questions (Section 3) — what to ask so the Service Professional arrives ready.

☐ Watch the GPS for each SP; make sure they dispatch and arrive on time; check GPS before you call or text an SP with a question.

☐ Dispatch, arrive, or complete a job for an SP when needed.

☐ Technician job notes and the change order form.

☐ Classify abandoned calls and Google LSA calls daily, before you leave (Section 5).

☐ Categorize every email you work. Prioritize the day around the office and the SPs — including a look at tomorrow's schedule before you leave, and calling outside-job clients ahead of bad weather.

☐ Invoice vs. estimate: the difference, what to check on an invoice or project invoice before it is sent, and how to send unfinished work back to the estimate on multi-day jobs (Section 4).

☐ Book a job from an estimate, including multi-day bookings (Section 4).

☐ Listen to successful and unsuccessful calls as time allows.

Week 2 — you drive

- Everything from Week 1, with you doing the work and the trainer beside you until you say you are ready to go on your own (help is always here).
- Lunch time: finish any videos still outstanding; study the price book and the Section 3 questions — the right questions keep the SP safe and set the job up to sell.
- End of Week 2: a conversation about how you are feeling, the expectations for Weeks 3 and 4, and goals for those two weeks. Weekly check-ins after that.

Done when: you have taken live calls, booked jobs in ServiceTitan end to end, classified a day's abandoned calls, and can say where every process in this manual lives.

Section 2 — The Call: The Master Phone Script

One script, merged from the Flat Price script, the 2026 script, and the July 2025 sales script. Work Modules A–E in order. If the customer interrupts and demands a price before they will schedule, skip straight to Module C (Build Value). Use Branch 1 or Branch 2 only when the call goes there.

MODULE A — GREETING & INTAKE

"Thank you for choosing Mr. Handyman. This is [YOUR NAME]. How can I assist you today?"

"We would be happy to help with that. Again, my name is [YOUR NAME] — whom do I have the pleasure of speaking with?"

"Great, [CUSTOMER NAME], can you tell me a little about your project?"

If the project is one of the common types, work the intake questions in Section 3 as you listen — and ask for pictures where Section 3 calls for them.

"In case we are disconnected, what is your best contact number?"

"We can look at the schedule together — what is the address of the property we will be servicing?"

Confirm the zip is in our territory (Zip Territory Map, Appendix B). Out of territory: "Unfortunately that is not part of our territory, but I can give you the number of the Mr. Handyman that serves your zip if you would like."

"Is this a residential or commercial property?"

"How were you referred to Mr. Handyman?"

"And what is your preferred email address? We will send your confirmation and your paid invoices there."

MODULE B — LISTEN & CARE

Listen. Restate what they said so they know you heard it. Show them you are listening:

"Tell me more… What's it doing?… Has this happened before?"

Care — reflect the feeling. Relate to or identify with their situation before you move on.

"If you are able to text over a few pictures, that helps our Service Professional come prepared. You can send them to 704-246-3381 — and let's get you scheduled now; we can follow up with the pictures after."

MODULE C — BUILD VALUE (NEW CLIENTS)

"Let me tell you about Mr. Handyman and how we work. We opened Mr. Handyman 8 years ago to provide North and South Carolina with a reliable, dependable home repair and maintenance service. Our Service Professionals are full-time employees — not subcontractors. They are insured and bonded, we carry workers' compensation, and every one of them has passed a criminal background check and

has at least 10 years of experience in the trades."

"Your Service Professional will arrive in a uniform, in a clearly marked vehicle, and we back all of our work with a 100% guarantee — our Done Right Promise. We also warranty our work, and any materials we purchase for you, for one year."

Shorter version for a D-personality caller: locally owned with national backing, bonded and insured, employees not subcontractors, background-checked, uniformed in a marked vehicle, price confirmed before any work starts, they clean up when finished, 100% satisfaction guarantee.

MODULE D — HOW WE WORK

"At Mr. Handyman, we work off a national price book. Your Service Professional will arrive onsite, review your projects, and discuss options, then give you a flat price to complete your projects — the price is confirmed with you before any work starts."

"If you decide to go forward that day, we waive the $88 consultation fee and the Service Professional will proceed with the work. If you decide to hold off for another time, we collect the $88 consultation fee for the visit."

"Just to confirm — will you be around that day? We generally like to perform your work the same day if the price is acceptable and you wish to move forward. Does that work?"

Materials: "We can certainly purchase materials for you. Shopping time is included in the estimate and there is a standard mark-up on materials; anything we purchase for you is warrantied for one year."

MODULE E — BOOK IT (EVERY CALL, EVERY TIME)

Do not wait to schedule. The goal is to book the job on the first call. Use one of these transitions:

"Let's lock in a time for you — our schedule fills quickly."

"We'll get you on the schedule now and can adjust if anything changes."

"We have some upcoming spots available — would [DATE/TIME] or [DATE/TIME] work for you?"

"How soon were you hoping to get this taken care of — would mornings or afternoons work better?"

Once booked, complete the close:

"Thank you, [CUSTOMER NAME], we have you all set for [DAY/DATE, ARRIVAL WINDOW]. You will receive a booking confirmation by text and email, a reminder the day before, and on the day of service a dispatch text when your Service Professional is on the way — it shows his picture and a short bio so you know who is coming."

"Your Service Professional will collect at the end of the day for the work completed that day. We take cash, checks, or cards — if you pay by credit or debit card, a 3% service fee is added. Do you have a preference?"

"If anything else comes to mind before the visit, let your Service Professional know — he can often complete add-on projects during the same visit. Is there anything else we can help you with?"

"Are you open to moving your appointment up if the schedule permits?"

Flexible customer? Offer the first-available (waiting) list: "If an opening comes up before your appointment, we may be able to complete the work sooner — we would call first to make sure it is convenient. Can we put you on our waiting list?"

"Thank you again for choosing Mr. Handyman. We look forward to seeing you on [DAY/DATE]."

BRANCH 1 — ESTIMATE ONLY (LARGER OR MULTI-DAY PROJECTS)

Use when the job sounds like a larger or multi-day project, needs special-order materials, or the customer insists on an estimate first. Schedule a consultation visit, morning or afternoon, 30–60 minutes.

"Based on what you are describing, this is a larger or multi-day project. I would like to schedule a consultation with one of our Service Professionals so he can discuss your project further and provide you with a written estimate. Once you approve the estimate, we will schedule the work so we can start and finish without interruptions."

"Just a reminder: there is an $88 consultation fee, which the Service Professional will collect at the visit."

Book it as Estimate Only in ServiceTitan (Section 4). The $88 is waived only when the customer goes forward and the work gets started the same day as the visit.

BRANCH 2 — OBJECTIONS (PRICE BEFORE THEY WILL BOOK)

FIRST OBJECTION — deflect and re-offer the appointment:

"We use a national standardized price book to prepare your estimate. Because every project has different variables, it is difficult for me to give you an accurate price from the office — and I am just the scheduler. What I can do is get you the next appointment: would [DATE/TIME] or [DATE/TIME] work?"

FINAL OBJECTION — only if they still will not book. Give ONE number only, the one closest to their project:

"Most jobs start around $200. / Most half-day jobs start around $750. / Most full-day jobs start around $1,500."

"Keep in mind, our Service Professional will review your projects and discuss options — they may find conditions we have not discussed — and they will finalize a flat price for your approval before starting any work."

Then return to Module E and close the booking.

TV INSTALLATION EXCEPTION:

TV installation may be quoted as a $200–$250 range. That is acceptable and is not a ballpark violation. (Adopted Nov 6, 2026 — Barbara’s request, Tim approved.)

Section 3 — Intake Questions by Job Type

Ask these on the call (Module A) so the Service Professional arrives with the right crew, ladder, and materials. Bold lines are staffing or safety rules — if one triggers, note it in the job summary so the board shows it. Ask for pictures wherever the list says so; pictures go to 704-246-3381.

Appliance Installation

- What is it?
- Are we removing the old one and disposing of it?

Assembly

- What is the item?
- How large is it?
- How many pieces are there?
- Ask for a link to the product and research the time required.

Boot Vent (roof boot)

- How many stories is the roof? **3 stories require 2 techs and a 40' ladder.**
- What does the ladder landing area look like — flat, on a hill, near a drop-off?
- Get a picture of the area.

Caulking

- What are we caulking — shower, counters, windows?
- What color is it currently?
- What color do they want?
- Get a picture.

Ceiling Fans

- New installation or remove and replace?
- Do they already have the new one?
- Does the fan need to be assembled?
- How tall is the ceiling?

Chandelier (light fixture)

- How heavy is the chandelier?
- How high is the ceiling? **Above 12' needs 2 techs (clarify with pictures).**
- Does the light need to be assembled?
- Remove and replace, or a new electrical location?

Crown Molding

- One room or the entire house?
- How tall are the ceilings?
- Do they already have the molding?

- Get pictures of the wall/area.

Deck Repairs

- Are we removing and replacing old boards?
- Do any of the posts need to be replaced?
- Are the boards underneath damaged?
- Are we painting or staining after the repairs?
- Do they have the new boards/posts/paint?

Doors — Interior

- Is it a hollow-core or solid door?
- Are we removing and replacing?
- Disposing of the old door?
- What material is the surrounding wall (drywall, brick, etc.)?

Doors — Exterior

- Do they already have the new one, or do we need to buy it?
- Is the new door pre-hung or a slab?
- Does the door have glass?

Drop Ceilings

- How many rooms?
- What is the square footage?
- Do they have the materials?
- Just the tiles, or the grid as well?
- Are any repairs needed to the grid?
- Size and color of the tiles?
- Are there light fixtures, sprinkler heads, HVAC vents, or wall edges that need to be cut around?

Drywall

- How big is the area needing to be redone?
- Is it from water damage? If so, has the leak already been repaired?
- Is it on the wall or the ceiling? **Large holes on the ceiling require 2 techs.**
- Get a picture of the area.

Electrical

- What needs to be done?
- New fixture or remove and replace the old?
- If remove and replace — is it a one-way or two-way switch?
- If a new fixture — there must be an existing line we can go off of.

Exhaust Fans

- Where is it going?

- How tall is the ceiling?
- Remove and replace, or a new installation?

Fascia

- Has something fallen off that needs to be replaced? Do they have the piece — and if so, is it bent?
- Are there any gutters connected?
- How high is it off the ground?
- What is the ground surface underneath — flat, on a hill, cement, grass?
- Get a picture.

Faucets

- How many?
- Where is it going?
- Do they already have the new faucet?

Flooring

- New installation or remove and replace?
- If replacing — what is the current flooring and what are they installing?
- How many square feet?
- Do they already have the new flooring?
- Are we disposing of the old flooring?

Garbage Disposal

- New installation or remove and replace?
- Is any plumbing required?
- Do they already have the new disposal?
- Get a picture of underneath the sink.

Grab Bars

- How many?
- What is the material of the walls where they will go?
- If tile — does the tile go all the way to the ceiling?

Gutters

- How many stories is the house? **3 stories require 2 techs and a 40' ladder.**
- How many sides of the house are we doing?
- Cleaning: are there gutter guards on them?

Hanging Pictures

- How many?
- What size are the items?
- What is the material of the walls where they will hang?

Mailbox

- Just the mailbox, or the mailbox post as well?
- Do they want the post cemented into the ground?
- Are they part of an HOA? Some have specifications for mailboxes.

Painting

- Interior or exterior?
- How many rooms are we painting?
- Walls? Ceilings?
- Do they already have the paint?

Pet Door

- Is it going into the wall or the door?
- Wall: does any electrical need to be moved? What is the material on the exterior of the house?
- Door: who is providing the door?

Plumbing

- What needs to be done?

Pressure Washing

- What is the surface (house, driveway, deck, etc.)?
- How many stories?
- Ask for pictures.

Re-screening

- How many screens?
- What color is the frame?
- What color are the screens?

Ring Camera

- How many?
- Battery or hardwired?
- Interior or exterior?
- What surface material are they going into?
- Exterior: 1st or 2nd story?

Shower Doors

- Is something wrong with it, or is it a new installation?
- If new — what is the model/brand of the door?
- Framed or frameless?
- Material of the wall in and around the shower? If tile — does it go all the way to the ceiling?
- Get pictures.

Shutter Installation

- How many are there?
- What level of the house — 1st or 2nd story?
- Do they already have the shutters?
- Do they already have the shutter pins?

Siding

- Are we replacing a portion or all of it?
- What is the material of the siding?
- Do they have the new siding, or will we need to help get it?

Slab Doors

- Is it interior or exterior?
- Do they have the new door?
- Do they have the hardware for the new door?

Smoke Detectors

- How many?
- Battery or hardwired?
- Battery — replacing the batteries or the entire fixture?
- How tall are the ceilings?
- Do they already have the new ones?

Storm Doors

- New installation or remove and replace?
- Do they already have the new door, or do we need to buy it?

Subfloor

- What is wrong with it? Is it wet?
- What level is that room on?
- What is underneath that room — 1st floor: crawlspace or basement? 2nd floor: another room, garage, etc.?
- Do they have the new flooring to install after the subfloor repair?

TV Mounts

- What size is the TV? **Over 55″ requires 2 techs to lift, unless the customer can assist.**
- What surface are they going into (drywall, brick, over fireplace, etc.)?
- Do they want the cords concealed behind the wall? (Drywall only pricing lives in the price book — brick or other material needs an estimate.)

Weatherstripping

- How many doors?

- Along the bottoms, or all the way around?
- Are some already installed that need to be removed?

Wood Rot

- What is the area?
- If a window — 1st or 2nd floor, and what is the ground area underneath?
- Interior or exterior? If exterior — is there damage on the inside?
- Do they have the paint?

Section 4 — Booking in ServiceTitan

From the Fixed Price Implementation Playbook, with our local rules. There are two kinds of bookings under fixed pricing. Estimate Consultation: assess, sell, and do the work the same day. Estimate Only: a consultation visit for larger jobs or special-order materials, with the work scheduled after the customer approves the written estimate. The call tells you which one — see Module D vs. Branch 1.

Estimate Consultation (the standard booking)

☐ Schedule the job as you normally would.

☐ Pick the job type — this preloads the $88 consultation fee into the job.

☐ Gauge the time to hold from the price book: open the mobile price book view (Pricebook → Mobile View) and check the recommended timeframes for the task(s). Task times may run higher or lower than what you are used to scheduling.

☐ Add the time tag: 1 hour, 2 hours, half day, or full day.

☐ Add the estimate template (Estimate Consultation — Residential or Commercial).

☐ In the job summary, state what the customer was told (fee quoted, pictures promised, anything from Section 3 that affects the job).

☐ After booking, open the estimate and move the follow-up date out three days (View Opportunity → Log a Follow Up → note “Follow Up” → move the appointment date out → Save). If you skip this, the estimate lands in the follow-up screen early.

Estimate Only

☐ Schedule the job as you normally would for an on-site estimate (30–60 minutes, morning or afternoon).

☐ Add the tag: Estimate Only.

☐ In the pricing-type dropdown, select Fixed Price.

☐ Note the consultation fee in the job summary ($88 — or the card amount if the customer will pay by card).

One-hour jobs

- When you know the task fits the one-hour minimum, book it for one hour: job type preloads the fee, tag it “1 hour minimum,” add the Estimate Consultation template.
- In the job summary, state that the customer was given the one-hour minimum and that the Service Professional will provide the estimate on arrival — if the customer does not proceed, the $88 consultation fee is charged.
- If pressed, you may give the minimum dollar amount — and say the Service Professional confirms the price when he arrives.

Diagnostics

- A diagnostic is a consultation by levels: Level 1 (1 hour), Level 2 (2 hours), Level 3 (3 hours). Common fits: Level 1 — small leak investigations, shower-door consults, window repairs. Level 2 — work that will go through an insurance claim. Level 3 — electrical diagnosis.
- Book the time for the level and add the Diagnostic tag.

OUR LOCAL RULES (they override the generic training videos): (1) Leads: dismiss the lead and put it in Follow Up; call and text from Follow Up. (2) Leads are booked under the consultation/estimate job type. (3) We work from the Dispatch Board, not the schedule dashboard. (4) Accounts receivable belongs to the office manager — route AR questions to her.

Multi-day jobs

Converting a sold multi-day estimate into jobs:

☐ Open the estimate from the customer record → View Opportunity (top right).

☐ Sold/Convert → confirm the Service Professional → select the items that go into Day 1 → Book New Job.

☐ Copy the estimate summary, including the estimate subtotal, into the new job's summary so the Service Professional can track it.

☐ Book Job, return to the estimate, and repeat until every item is accounted for. This creates the project automatically.

☐ On later days' invoices, add the supply/tool usage and card fees that belong to those days. (There is no dispatch/service charge anymore — it was removed when the hourly rate went to $188.)

- The Service Professional updates the summary daily with the work done, enters purchase orders, and adjusts or zeroes the estimated material charge.
- Splitting materials and adding POs changes the material mark-up and the project subtotal — estimate high on materials to account for it.
- If a job continues into another day, the Service Professional collects payment for the day and completes the job; the office schedules the continuation and tells the customer.
- Customer insists on a phone estimate for a multi-day job: you may say one day of labor runs about $1,500 if that is within their budget; if they agree, book the Estimate Consultation and note the number you gave in the job summary.

Section 5 — The Daily Rhythm

Morning overview (before the phones get busy)

☐ Check Zyra emails — any cancellations that came in overnight?

☐ Check ServiceTitan — any cancellations?

☐ Check the dispatch texts — any SP called out or running late?

☐ Look at the day's inside/outside jobs and the weather — will weather affect any job? Call outside-job clients ahead of bad weather when you can.

☐ Enter any leads that came in overnight.

☐ 8:00 AM — turn yourself on in Dialpad.

During the day

☐ Add leads as they come in, throughout the day. Answer incoming calls.

☐ Follow up on residential leads.

☐ Maintain the dashboard screen.

☐ Classify every abandoned call: assign it to a CSR, or to “Answering Service (AS)” with a note about what you did (called and left a message, etc.).

☐ Work the 2-week lookback: go back two weeks in the calls under AS and reclassify as needed (for example, when a job was booked after the original lead call).

☐ Happy Calls — residential (when Barbara needs the help): Section 7.

☐ Watch the SPs on GPS; chase late dispatches and arrivals.

THE LEAD RULES THAT MATTER (they are also incentive-plan guardrails): An abandoned call of 30 seconds or more is a LEAD until it is followed up, matched to a job, or excused — and it must be followed up by the next business day. A booking counts when the job runs. Sold work must be scheduled before Friday close — never leave a sold estimate unscheduled over the weekend. See the CSR Incentive Pay Plan for the full plan.

The morning briefing and huddle

- From November 2, 2026: the CSR daily briefing lands at 8:30 AM (today's board actions and unconfirmed chases, yesterday's phones and leads, the follow-up queue, named office money items, and assignments). Tim approves it; it goes to the office inbox with Tim and Ingrid copied.
- The office huddle is 10:00 AM daily, 15 minutes: cash first, board coverage, follow-up queue, one exception, scoreboard.

Before you leave

☐ All of today's abandoned calls classified; Google LSA calls classified.

☐ Check the dispatch board for the following day: every appointment confirmed? If not, call and confirm.

☐ Anything on tomorrow's board that weather, materials, or crew will break? Flag it now, not in the morning.

Weekly

☐ Google LSAs: “Rate the lead” — request a refund, archive as unbooked, or mark as booked.

☐ Thursday or Friday: sweep back one week through the abandoned calls and make sure none were missed.

☐ Thank-you letters and coupons (Section 7).

Monthly

☐ Send GOOD pictures of completed jobs to Gracie and Alek.

Section 6 — Money: Collecting and Checking

The Service Professional collects at the end of the day for the work completed that day: cash, check, or card. On card payments a 3% service fee is added — the customer hears that on the call (Module E), so there are no surprises at the door.

SWIPESIMPLE — TAKING A CARD PAYMENT

1. Open the SwipeSimple app. Log in with the password if needed.

2. Make sure the card reader is connected (Settings — the three lines, upper left → Device Management).

3. New Charge. Enter the ServiceTitan invoice amount (without tip). Checkout → select Card.

4. Make sure the reader is powered on and shows Swipe, Dip, or Tap. Tap, insert, or swipe the card.

5. Check the details. Add the authorized amount back onto the ST invoice: the tip goes on the Tip task in ServiceTitan; the final amount goes on the invoice as the SS payment.

6. Use Transaction History if you need to verify a charge. Then Closeout.

- Check receipts against technician invoices — the receipt, the invoice total, and the payment in ServiceTitan must agree. Flag mismatches the same day.
- Know the difference: an estimate is the priced promise; an invoice is the bill for work done. Before an invoice or project invoice is sent, check it (Section 4 covers sending unfinished multi-day work back to the estimate).
- Payments received but not applied get applied the same day — if a payment is sitting unapplied, it has a name on it by the huddle.

Section 7 — After the Job

- Happy Calls (residential): call the client after the job. If they complete the survey, enter it. If you cannot reach them, put a note in and pin it until you hear from the client.
- Unhappy customer: pause the Broadly review request before a bad review lands, and get Tim or Ingrid involved the same day. The office owns the complaint — never hand the customer off to a tech or a subcontractor to resolve.
- Write thank-you letters to customers who left reviews.
- Send a thank-you and a $50 coupon to residential customers at $3,000+; a thank-you and a $100 coupon at $5,000+.
- Work we do not do, or a customer outside the trade: hand them a referral partner from Appendix A — Neighborly partners first. A good referral is still a good experience with our name on it.

Section 8 — Escalations & Special Processes

When a job should be subbed out

If a lead or a job looks better handled by a subcontractor (trade fit, capacity, timing): the CSR does not source or contact subcontractors. Gather the customer and job details (customer, trade, scope, location, timeline) and email the job requirements to Tim and Ingrid the same day. Tim and Ingrid source the candidate, make first contact, and own verification. Protect the customer conversation: no subbed date is promised to the customer before Tim decides, and onboarding takes days — a live job may not wait. Note the escalation in the Subcontractor Onboarding Tracker. The full step-by-step is its own document: Subcontractor Onboarding — CSR Step-by-Step.

Phone estimating (Handoff) — live (see Appendix E)

- Smaller jobs are estimated and sold by phone with Handoff, so techs arrive at essentially pre-sold jobs. The workflow is LIVE: the full process is Appendix E of this manual, and on the call it runs through the canonical phone script (Branch 3B is the entry point when the $88 is the sticking point).
- Invoicing stays in ServiceTitan; take the deposit / e-signature at booking; mark phone-sold jobs so we can track them.
- The playbook and the CSR training one-pager live in the Drive AI Estimates & Handoff folder. A job that is not on the tight list, or that prices over the $2,000 phone cap, books the $88 estimate visit instead — never a phone price.

Anything that is not a normal booking

- Out of territory: offer the number for the Mr. Handyman that serves their zip (2026 script, Module A).
- A trade we do not do: Appendix A referral partners.
- Commercial work: book under the commercial job type and template; when in doubt about scope or authorization, ask Tim or Ingrid before you promise anything.

- A customer asking for a subcontractor by name, or a sub asking the office for work: route it to Tim and Ingrid — never book outside the approved roster.

Appendix A — Referral Partners

Cleaned from the office referral list (October 2026). Neighborly brands first where we have one. If a number is dead, tell Ingrid — she owns this list.

Trade	Company	Contact	Phone	Email / notes
Appliances	Mr. Appliance — South	Raymond Maloney	(704) 443-5225	southcharlotte@mrappliance.com
Appliances	Mr. Appliance — Rock Hill	Judith Vorcherdt	(803) 670-3100	rockhill.owner@mrappliance.com
Chimney	Owens Chimney		(704) 765-6844	
Cleaning	Kings Cleaners	Jesse King	(980) 406-1075	jesse@kingscleaners.net
Doors	World of Windows	Tim Waddle	(704) 921-9898	Twaddell@windowscharlotte.com
Doors	Cook & Boardman	Carl Duda	(704) 940-3634	Cookandboardman.com
Electric	Mr. Electric of Indian Land	Adam Miller	(803) 396-8804	indianland.owner@mrelectric.com
Electric	Mr. Electric of Charlotte	John Joseph	(980) 223-5770	jjoseph@ncelectricgroup.com
Electric	David Long Electrical	David Long	(704) 849-0007	david@davidlongelectrical.com
Flooring	M & M Flooring	Janet Mejia	(704) 512-8556	m_m_hardwood@hotmail.com
Flooring	L & L Flooring		(704) 749-2490	
Garage Doors	Precision Garage Door	Doug Kale	(704) 736-3902	charlotte@precisiondoor.net
GC — General	Hillman Design Build	Nick Whitrow	(803) 977-4319	nick@hillmandesignbuild.com
GC — General	Pro Build	John Clevenger	(615) 477-9315	john@probuildcarolina.com
Gutters	HK Guttering, Inc.	Jerry Troxell	(704) 989-1489	hkgutteringinc2@aol.com
Home Automation	Wylie AV	John Lutz	(847) 530-7146	
Home Inspections	HouseMaster Home	Reese Haley	(803) 831-0057	
HVAC	Elite Air and Heat	Rob Cooper	(803) 366-4663	Cell (803) 487-8714

Junk Removal	Junk King of Charlotte	Gustavo or Mitch	(704) 469-4815	Mitch (203) 434-9386
Junk Removal	Junk King of Rock Hill	Gustavo or Mitch	(803) 902-4945	Gustavo (904) 316-2621
Landscaping	American Green Lawn	Jason Napoletano	(860) 966-4211	jason@americangreenlawns.com
Lawn Issues	Lawn Pride	Dina Walsh	(704) 520-9286	dina.walsh@lawnpride.com
Movers	Miracle Movers		(704) 741-3510	
Painting	Fresh Coat Painters	Dan & Sara Chang	(704) 493-1612	
Painting	Five Star Painting	Richard Pasciuto	(704) 999-6892	richardp@fivestarpainting.com
Painting & Wallpaper			(509) 987-3990 / (704) 955-9999	From the source list — company name unclear; verify before use
Pest Control	Freedom Pest Services	Dave Staib	(843) 637-9030	
Plumbing	Our Legacy Plumbing	Kaleb Denning	(636) 893-4405	ourlegacyplumbing@gmail.com
Restoration	United Water Restoration	Mark Hampton	(704) 780-0510	
Restoration	Emergency Restoration Xperts (ERX)	Chakyra Cherry, GC	(704) 577-2259	chakyra.cherry@erx247.com
Roofing & Gutters	Blue Fox	Jay Elie	(704) 448-9199	
Shelving	ShelfGenie of Charlotte	Eagle Vasquez	(704) 387-3817	
Welding		Alejandro Martinez	(980) 422-2317	alexamr@sbcglobal.net
Window Cleaning	Shine of York County	Bart Capristo	(839) 232-8310	
Windows	Glass Doctor	William Sieber	(704) 847-4527	ed.sieber@glassdoctor.com

Appendix B — Territory

The Zip Territory Map PDF files with this manual in the CSR Training folder. If the zip is not ours, use the Module A line and offer the number of the franchise that serves it — never book out-of-territory work on a guess.

VERSION NOTES — decisions baked into this merge (Tim: flip any of these and this manual gets one correction pass): (1) Ballparks use the Flat Price script's set — start ~$200, half day ~$750, full day ~$1,500 (the July 2025 script's $350 / $900 set was retired; the half-day figure was set to $750 by Tim, Oct 22). (2) The $88 is called the CONSULTATION FEE everywhere; it applies to Estimate Only visits too, and is waived only when work goes forward and gets started the same day (the July 2025 script's "no $88 over $5,000" line was not carried over). (3) Build Value says 8 years. (4) The SP On Boarding In-Field Training Checklist stays with Tech Training — it is a Service Professional document, not a CSR one. Sources merged: Flat Price Phone Sales Script; PHONE SCRIPT-2026; New sales phone script 7.1.25; Fixed Price Implementation Playbook — Office; CSR tasks; Orientation for new CSR; Jobs and questions to ask; Swip Simple Payment proceedure; referrals list; plus the October 2026 sub-out escalation rule, CSR daily briefing, and incentive guardrails.

Appendix C — Commercial Work (added Nov 6, 2026)

Commercial accounts are a growing part of the book (about a fifth of invoicing). The rules below were set Nov 5–6, 2026 and are the standard for every commercial call, booking, and invoice. Vendor onboarding packets themselves belong to PJ — see the Commercial Vendor Master Packet and the one-page Vendor Packet Fill-Out Guide.

Who does what

- CSR: take the call, book the job in ServiceTitan under the commercial account, apply the numbers below, and flag account paperwork to PJ the same day.
- PJ (Commercial Developer): owns vendor packets, account terms, COIs, and NTE records. If it is paperwork, it is PJ's.
- Tim/Ingrid: pricing exceptions, dispatch-fee waivers, and anything outside this appendix.

The commercial numbers

- Direct commercial labor: $210/hr (bill-to is the business itself).
- Commercial Dispatch Fee: $119 on every commercial trip — charged when the truck rolls, and NOT refunded when the work proceeds. Script: "For our commercial accounts there's a $119 dispatch fee for the visit, and that stays on the invoice whether or not you go ahead with the work." Waivers are owner-only — never offer one on the call.
- NO $88 consultation fee on commercial accounts. The $88 is residential only. If a commercial caller asks about an estimate fee: "There's no consultation fee for commercial accounts — the $119 dispatch fee is the visit charge." Never add the $88 to a commercial job, and never stack it with the dispatch fee.

- Emergency labor: $282/hr. Emergency hours are after 5pm, weekends, and holidays — quote it as written: "Emergency rates are $282. Emergency hours are after 5pm, weekends, holidays." During normal business hours the emergency rate applies ONLY when we come the same day and have to cancel other appointments to accommodate them; same-day work that fits without displacing anyone bills at normal rates.
- Intermediary / facilities accounts (Brightview, MaintenX, SMG and similar work-order programs): priced per their work order, not the $210 rate. If the work order shows a not-to-exceed, work to it (below).

Payment terms (added Nov 7, 2026)

- Direct commercial invoices are **Due on Receipt — Net 15 is the maximum.** Do not agree to longer terms on the call; route exceptions to PJ/Tim the same day.
- Intermediary / facilities accounts stay **Net 30–60 only where the account's volume earns it** — anything beyond that is Tim's call.

Not-to-exceed (NTE) — on the call and on the job

- Every commercial account's NTE (amount and whether it is per job, per visit, or per work order) plus their named overage approver is captured at onboarding and recorded in the Commercial Vendor Tracker. Before booking work on an account, check the Tracker for its NTE.
- If a caller mentions a cap that is not in the Tracker, note the amount and the approver's name in the job notes and flag PJ the same day — do not promise work above any cap.
- Work estimated above the recorded NTE starts only after the named approver's written approval is in hand (PJ owns getting it; the approval is saved with the ServiceTitan job). We never exceed an NTE silently and never split a job to fit under one.
- Estimate-only visits for commercial project work carry no fee; PJ qualifies the scope by phone/photos first so a truck rolls for billable work, not free opinions.

Do not

- Do not quote the residential $88 script to a commercial caller.
- Do not waive the $119 dispatch fee — owner-only.
- Do not agree to account terms, rate changes, or NTE commitments beyond this appendix on the call — take the information, book what fits the standards, and route the rest to PJ/Tim the same day.

Appendix D — Settled Rules & Processes (added Nov 7, 2026)

Standing rules and processes settled in the owners' work Oct 4 – Nov 6, 2026, folded into this manual under the living-document rule (Nov 6, 2026). Each section carries the date Tim settled it.

Abandoned Calls, Lead Classification & Follow-Up Logging

(Settled: Oct 16, 2026; clarified Nov 3, 2026; updated Nov 4, 2026 — per Tim)

An abandoned call of 30 seconds or longer shows in ServiceTitan as a lead. Left sitting unbooked, it drags the team's lead conversion — so every one of these gets a determination and a follow-up, or a reason on the record.

First determination vs. reclassification. A call still sitting as Abandoned has no determination yet. The CSR who picks it up and makes that first call — book it, or mark it not-a-lead / excused with the reason in the record — is doing the job, not reclassifying. The no-change rule below applies only to a record that already carries someone's determination.

The rules:

- Classify correctly at handling, with a reason or note on the record.
- Never retroactively reclassify your own or another CSR's call — **except** a CLEAR match: when the caller's number unambiguously matches a job booked after the call, the record may be flipped without asking first. The flip is credited through the job link to the CSR who booked it, and every automatic flip is logged and listed in the next summary.
- Anything short of a clear match — a fuzzy or possible match — is Tim's call. Flag it; do not change it.
- If a record already carries a determination and you believe it's wrong, flag it for Tim. Do not change it.

Voicemail and found-lead workflow (PJ's workflow, adopted as standing):

- Voicemail lead → create the service request (not booked), place a Follow Up, and mark it "In F/U."
- Not a lead → excuse it, with the reason on the record.
- No voicemail → callback / left-message note. If there's no voicemail and no profile, note it that way — don't build a shell profile.
- Before creating anything, check for a duplicate within ±2 weeks.
- Leads found by a sweep with a name: they go on the next morning briefing's work list; the CSR calls, searches first, creates the profile manually, places the Follow Up, and logs who owns it. Number-only leads ride a carried still-unbooked list — no shell profiles.

Logging a follow-up attempt — the log of record. A follow-up counts only when it is logged as a **Follow Up entry on the customer's ServiceTitan record**, carrying the attempt, the outcome, and the next step, by the next business day. Job notes are for job details once a job exists — an unbooked lead has no job, so job notes are not the attempt log. Dialpad call history alone does not clear a lead.

Closing an "In F/U" item: append a dated completion note. Do not delete the earlier detail.

Reviewing the Board: Job Summaries & Reporting Rules

(Settled: Oct 25–26, 2026 — per Tim)

When a day's board is reviewed, each job is read the same way:

1. Pull the job's written summary **and** its sold estimate from ServiceTitan (read-only).

2. Report: the scope as written · the estimated duration · the likely materials and their cost · a summary-quality grade — the booked window measured against the work at the $188/hr labor benchmark.

3. Note which bi-weekly payroll period the job falls in (and, if its invoice is consolidated, which period that invoice falls in).

The $0 invoice rule. A $0 invoice does **not** by itself mean no sold work. On multi-job projects the office may leave every line item on one invoice — before calling a $0 job unsold, check the same customer's other jobs and invoices for the consolidated invoice.

Warranty assignment. For warranty and callback work, check whether the same tech who did the original work was sent back. Same tech back is the policy. A different tech is legitimate only when the customer doesn't want the original tech back — a soft "would prefer someone else" counts — and that reason must be documented. A different-tech assignment with the reason documented is policy followed; without it, it gets flagged as unexplained.

Confirmation status is ignored in all reports. No report surfaces appointment confirmation status or unconfirmed counts — not the morning briefing, the board check, the CSR briefing, or job-summary reviews. The office handles confirmations without them being reported up.

Board and rate checks use job START time, not arrival windows.

The Daily Goal & the $188 Benchmark

(Settled: Oct 27, 2026 — per Tim; labor rate recorded Oct 7, 2026)

The company's labor benchmark is **$188/hr**. Tech performance is measured against it (the evening effective-rate report), and job windows are graded against it.

The daily revenue goal **scales with the board**: **$1,500 × the number of techs with assigned jobs that day.** A tech counts once when they have assigned jobs — a board day. Jimmy counts on the days he carries his own jobs (Tuesday–Friday, plus Saturdays he works) — never Mondays. The scaled goal is the yardstick in the morning briefing, the 10 AM huddle, the board check, and the evening rate report.

The CSR Incentive Plan — Parts, Guardrails & Standing Rules

(Built Oct 20–21, 2026; launched Tue Oct 27, 2026 at the 10 AM huddle; standing rules adopted Oct 27, 2026 — per Tim)

CSRs are paid on what they control. The plan covers Barbara, PJ, and Kris; Ingrid qualifies for Part 2 in weeks she takes 10+ lead calls.

Part 1 — Board Fill (team). Booked board value per tech-day: $1,250+ pays $25 each · $1,375+ pays $50 each · $1,500+ pays $100 each.

Part 2 — Lead Booking (individual). From the ServiceTitan scorecard, minimum 10 lead calls: booking 75%+ pays $25 · 85%+ pays $50.

Part 3 — Money In (team). The week closes at 90%+ collected → $25 each. Plus a $15 spiff per open-estimate follow-up that sells **and** gets booked.

Guardrails:

- A booking counts when the job runs.
- An abandoned 30-second+ lead not followed up by the next business day kills that CSR's Part 2 for the week.
- Sold work still unscheduled at Friday close kills Part 1.
- Tim's own technician-account invoices are excluded from incentive numbers entirely (they still count in dashboard, weekly-review, and QuickBooks revenue).

The four standing rules (adopted Oct 27, 2026):

1. **Multi-day projects** — work days are allocated to the day the work runs under the Rocco rule, in Part 1 only.

2. **Declared Weather Day** — a declared weather day drops out of Part 1's numerator and denominator entirely, and each qualifying reschedule earns the $15 weather-save spiff.

3. **Travel time** gets no incentive accommodation.

4. **Full-day go-backs** confirmed by Tim or Ingrid at finals drop that tech-day out of the Part 1 average.

Reporting & privacy. The group briefing goes to the office; each CSR also gets a personal briefing at their work email. Individual Part 2 figures and personal totals appear **only** in that CSR's own briefing — never in the group document. Cadence: a Monday final and a Thursday mid-week pace update. Monday finals and Thursday pace go out only on Tim's approval, and every send copies Tim and Ingrid.

Texting Customers: ServiceTitan Chat vs. Marketing SMS

(Settled: Nov 1, 2026 correction — per Tim)

Two different things, and they are not interchangeable:

- **ServiceTitan Chat (STC)** is how the office texts customers one-to-one. Once a customer is in the CRM, one-to-one texting through STC works and is the normal route.
- **ServiceTitan Marketing campaign SMS** is a separate channel, and it is blocked by the campaign registration status. The registration block applies to Marketing campaigns only — it does not limit STC.
- Never use the transactional-SMS tile for promotions.

Payroll Method

(Commission scale Oct 11, 2026; source rule Oct 14, 2026, base corrected Oct 22, 2026; reconciliation rule Oct 12, 2026; warranty minimum adopted Nov 1, 2026; cash figure corrected Oct 31, 2026 — per Tim)

The one source. Payroll is built from the Technician Sales Detail Report only, **unposted invoices always included** — a pull without them once missed roughly $15K, about half a week's revenue. Labor Revenue, Service Charge Revenue (including consultation fees), Hours Worked, and Total Revenue all come from that report.

The commission base is GROSS. Base = Labor Revenue + Service Charge Revenue. Refunds and discounts are **never** deducted — no offset line of any kind comes out of the base. (The Discount figure is still recorded, for reconciliation visibility only.) Materials sold are not in the base. This is the gross method Ingrid has used all along; the plan photo shown to prospective techs is an example, not a method change. Periods already paid are not recalculated unless Tim directs a true-up.

Commission tiers (weekly revenue including materials): under $4,000 → 18% · $4,000–$5,000 → 19% · $5,000 → 22% · $6,000 → 23% · $7,000 → 24%. Payout = tier % × the commission base. Tiers are calibrated to a 40-hour week and can move week to week.

Reconciliation before finalizing. Every period, per-tech revenue and labor from the Sales Detail are compared against the payroll figures, and discrepancies go to Tim before anything is finalized. Questions are welcome before payroll is completed — ask rather than guess when figures don't reconcile.

Warranty scan. Each run scans warranty / refund-type invoices, but the scan never changes the base. Only **same-tech** warranty items are flagged to Tim before finalizing.

Same-tech warranty minimum (adopted exception — in effect). When a tech redoes their own warranty work, they receive a minimum of **$15/hr for all time on that warranty job**: top-up = the greater of $0 or (hours × $15 − the commission on that job). Same-tech only; different-tech warranty work is untouched. First applied in the Nov 9, 2026 payroll run (period Oct 26 – Nov 8, 2026).

Jimmy's rule (separate — settled Oct 27, 2026, and paid on this basis). Jimmy is paid the larger of his commission or **$200 × days actually worked**; Saturdays he works count. This stands on its own, regardless of any other pay-package decision.

Team meeting pay is $25 per meeting. It is not built into any report — the office adds it manually.

Tech pay summaries are one-page PDFs: total pay up top, then hours, revenue, and commission per week, with an "Eligible labor" line (the commission basis) and the wording "Commission rate tier." The hourly-rate equivalent (commission ÷ hours) appears only on Jacob's and Vasile's sheets and stubs.

The cash figure. A payroll run's true cash cost is **employee pay plus payroll taxes** — a normal bi-weekly run is roughly **$25–30K all-in**. The pay-stub total is net employee pay only; never use it as the payroll outflow in cash planning. Cash checks reserve a full run (~$30K) in the main checking account.

Invoicing Rules: Warranty Lines, Fee Waivers & Supply/Tool

(Warranty format live Oct 12, 2026; waiver rule added Oct 18, 2026; supply/tool Oct 12, 2026 — per Tim)

Warranty / callback invoices are built so the invoice totals $0: a labor line at $188/hr, offset by a negative line — "Callback/Warranty work – same tech" or "Callback/Warranty work – different tech," matching who actually did the return work.

$88 consultation-fee waivers. The $88 fee is waived when the tech sells the work on the spot **and** at least gets started; if the work is scheduled for later, the fee stands. A waiver is always visible: it shows on the same invoice as a "Refund Consultation Fee" line (−$88). Fees that were never added are invisible to tracking — so a waiver is shown, never silently omitted. (In practice, fees are also waived for pushback customers; commercial jobs never carry the $88 — see Appendix C.)

Supply/Tool usage is a ServiceTitan invoice line item, sitting under the invoice's discounts and fees. It runs about $1,500/week crew-wide and is tracked in its own column, feeding the material figures.

Over-PO tracking. Tech spending over PO cost is tracked as possible van stocking, flagged with an "Over PO $" column in the weekly review workbook.

ServiceTitan → QuickBooks: Batch & Export

(Settled Oct 19, 2026; division of labor corrected Nov 3, 2026 and proven on batch #3649 — per Tim)

The split of work is fixed:

- **Ziggy** fills the batch, verifies it, **posts** it, and verifies the export result.
- **Tim** creates the batch and clicks **Export to QuickBooks Online**. Those two actions are Tim's — they do not respond to anyone else's clicks.

Daily prep (weekdays ~7:20 AM). The ready list is posted to Tim first, in plain CLOSED vs ONGOING framing. The simplified batch-request email goes to the office **only when Tim asks** — the prep never emails itself.

Held invoices are deliberate. Part of the pending pile is intentionally held back: invoices on ongoing jobs stay unexported. Flagged/ongoing means an active or ongoing job or project, split/adjustment rows on already-exported parents, and anything still being edited — all excluded from the ready totals. Never treat the full pending total as exportable backlog.

SwipeSimple payments. Card payments show in ServiceTitan as "SS." They land in the checking account the **next business day**. SwipeSimple deducts **no fees** from the payout (fees are billed separately), so net = gross, and the QuickBooks deposit is built to the full payout amount.

Business Amex Allocation in QuickBooks

(Settled Oct 19, 2026 — per Tim)

The business Amex sits in QuickBooks as account 2051. Materials COGS (5120) has a sub-account per tech.

- **Only PO/invoice-matched charges** are allocated to a tech's 5120 sub-account (contra 2051).
- **Unmatched charges stay UNALLOCATED**, listed per tech for Tim's review — they may be van stock. Never force an unmatched charge into job materials.

- The charges already sit in the QuickBooks banking feed under 2051. Ziggy prepares the allocation list; the categorization clicks in the feed are done by Tim or the office.
- Per-tech "van stock" sub-accounts exist but are not used unless Tim says so.

Estimates Sold / Unsold: The Counting Method

(Settled Oct 12–13, 2026 — per Tim)

Estimate performance is counted one way, from the ServiceTitan **"Tech estimates sold"** report — never from payroll data (the payroll figures severely undercounted until this report replaced them).

- **Basis:** Creation Date.
- **Grouped by:** Estimate Created By.
- **Sold** = Sold. **Unsold** = Dismissed + Open.
- Office rows are excluded from the tech figures — but flagged when a tech sold one.

This method is standing for every run: the tech metrics tracker, payroll reporting, and the dashboard all count estimates this way.

Applicant Intake: The Google Voice Process Line

(Adopted Nov 6, 2026 — per Tim)

Tech applicants are given a process to follow: call the Google Voice number **(980) 349-6797** and leave a voicemail answering the application questions (Indeed also lets applicants answer by text or email to the same number). The line lives on the office@ Workspace account.

- An applicant who follows the process — calls and leaves the voicemail as instructed — is a **best-shot candidate**: a process-follower. These are the most serious applicants we get.
- Google Voice mail in the office@ inbox **is applicant mail. It is never junk** and is never flagged or unsubscribed.
- Review is read-only: checking the Voice inbox never sends anything and never changes a setting.
- What surfaces: a **"Followed the process"** section in the Monday applicant digest, and a **same-day alert to Ingrid (~4:20 PM weekdays)** for TOP/MAYBE candidates only. Ingrid makes all applicant contact.

New-Hire Onboarding

(Master checklist created Nov 6, 2026; gate and MVR rules Nov 6, 2026; Saturday rule Oct 23, 2026 — per Tim)

Every hire is run from the **master new-hire onboarding checklist** (clone it per hire — `new-hire-onboarding-checklist-TEMPLATE.md`). The Nov 4–5 per-hire checklists covered only offer/acceptance and checks; the master template adds the sections that were missing:

1. **Offer & acceptance** — signed offer letter returned (scan or photo is fine). No start date is promised until the pre-employment checks complete.

2. **Returning-employee check** — before anything else, confirm whether the hire has worked here before; a returning tech's ServiceTitan record is reactivated, not duplicated.

3. **Pre-employment checks** — the office initiates the background check and drug test, sends the hire their steps, and any flags go to **Tim** for the approve/decline call. Drug testing is walk-in at **Any Lab Test Now** (nearest: Charlotte, 8318 Pineville-Matthews Rd Ste 708, (704) 541-8115; drug screening Mon–Fri 10 AM–4 PM, Sat 9 AM–1 PM; also Indian Trail and Charlotte–Ayrsley).

4. **The hire supplies their own driving record (MVR)** — technicians get it from the NC DMV (or the SC DMV if SC-licensed) and reply with it attached. The office reviews it; flags go to Tim.

MVR acceptance standard (Settled: Nov 7, 2026, per Tim):

- Valid license; no suspension or revocation in the last 3 years.
- No DUI/DWI in the last 5 years.
- No more than 3 points (or 2 moving violations) in the last 3 years.
- No more than 1 at-fault accident in the last 3 years.
- Anything outside those lines goes to Tim for the decision.

5. **Before Day 1 — systems & access:**

- Capture and **confirm the hire's sign-in email** — nothing opens until this is exact.

- The hire is added to **four** access policies: the portal gate (mrhm-team), their area gate (tech or CSR), the training gate (mrhm-training), and their training-track app.

- The checklist page's invite button emails the hire their portal sign-in link (from southcharlotte@mrhandyman.com) with the code sign-in steps and the SS card / photo ID reminder — a human presses Send.

- ServiceTitan profile + Technician Shifts + dispatch board placement.

- Payroll set up from the signed offer terms; employee Amex issued and mapped to their 5120 sub-account.

- Training Step 0 assigned; first-week pairing set.

6. **The onboarding packet** (on the employee portal): personal info, emergency contact, optional direct deposit, W-4, I-9 Section 1, and uploads of the SS card + photo ID, with a typed signature. A hire cannot open the packet until their email has been added to the gates.

7. **In-person I-9 Section 2** is completed within **3 business days** of the start date, and the packet is verified.

8. **Training Steps 1–4** are signed off as completed (Barbara certifies CSRs; Tim certifies techs).

Hiring screen note: Saturday availability is **not** a hiring screen (Tim, Oct 23, 2026 — "not really important"). Never lead a candidate call with it; neither posting asks about Saturdays, and the ZipRecruiter posting promises "No Weekends."

Appendix E — Phone Estimating (Handoff) — LIVE (added Nov 7, 2026)

CSR phone estimating with Handoff is live: smaller jobs are estimated and sold by phone so Service Professionals arrive at essentially pre-sold jobs. *(Workflow verified in the live Handoff workspace Oct 24–30, 2026; Branch 3B entry point adopted Nov 7, 2026 — per Tim.)*

The two doors in

Lead follow-up. Working an open lead or a follow-up, offer the phone estimate for an eligible job instead of letting it sit.

Branch 3B of the phone script. On a live call, when the customer pushes back on the **$88** consultation fee **and** the waiver line ("waived if we start the work that day") does not land, offer the Handoff estimate: photos and measurements by text, and we build an actual written estimate — **no visit, and no fee.** Do not offer it up front; it is the recovery, not an opening option.

On this path there is **NO $88 consultation fee** — there is no visit. The customer pays only if they approve the written estimate and the work gets done.

Capture it on the call

- Work the Section 3 intake questions for the job type, plus measurements, make/model if known, and who supplies the fixture — us or the customer.
- Photos: "You can text the pictures to **704-246-3381**."
- Set the expectation: "Once your photos come in, we'll build the estimate and send it over **within one business day**."
- **Log it before you hang up:** a Follow Up entry on the customer's ServiceTitan record. The estimate is built as a follow-up task once the photos arrive — not on the live call. The ServiceTitan record is the log of record.
- If they push for a number before the estimate is built, deflect once — and only as a last resort give ONE Flat Price ballpark ($200 / $750 half-day / $1,500), the one closest to their job. Branch 2 discipline does not change.

The tight list — phone cap $2,000

Phone estimating is only for these job types, and only while the estimate stays under the **$2,000 phone cap**:

- Faucet replacement (existing supply connections)
- Toilet replacement or tank rebuild (existing flange in good condition)
- Garbage disposal replacement — like-for-like only
- Drywall patch (small area, paint-ready finish)
- Interior door replacement (pre-hung or slab swap)
- Ceiling fan / light fixture swap (wiring and rated box already in place)

Never price by phone — book the $88 estimate visit

- Structural work, electrical panel work or a new circuit/outlet, gas lines, permit-required work
- Hidden damage: rot, water damage, flange or framing damage
- First-time disposal installation (no existing disposal)
- New wiring or a new ceiling box; ceilings over 12 ft
- Drywall that is soft, moldy, or stained beyond one small area
- Repiping, drain work, or fixture relocation

The 5-step run (follow-up task, once the photos arrive)

1. **Gather first:** photos of the job, measurements, make/model if known, who supplies the fixture (us or customer), and the watch-out questions for the type — shut-off valves corroded? toilet rocks or flange/floor damage? disposal hardwired? drywall texture? pre-hung or slab? ceiling height and existing box?

2. **Start it:** Home → Ask Handy → **Estimate**, or open a Project → **Create estimate**. Type or dictate the job description; attach the photos with **Add attachment**.

3. **Plan mode is ON:** Handy shows the scope and the decisions for review *before* it builds. Approve or correct there — do not let a wrong scope price.

4. **Check the pricing before anything goes out:** labor $188/hr Mon–Fri 8–5, $282/hr after hours / weekends. Material markup must be the tiered markup by line price (100% under $100 · 79% $100–200 · 58% $200–500 · 48% $500–1,000 · 38.33% over $1,000) — never a flat markup. The consultation-fee, estimated-materials, and disposal-fee lines carry no dollar amount in their instructions; price them on the estimate itself. **STOP rule:** if an estimate shows “No instructions applied” with a flat 35% markup on *every* line, labor included — **do not send it. Escalate.**

5. **Review every line, then send** through the normal approval path. **Invoicing stays in ServiceTitan** — Handoff does not invoice. Take the deposit / e-signature at booking, and mark phone-sold jobs so we can track them.

Over the $2,000 cap? Stop. Call the customer, explain the job needs an in-person look after all, and book the $88 estimate visit.

HouseMaster inspection reports: PAUSED (Oct 26, 2026) — not live workflow. Do not build estimates from HouseMaster reports until Tim restarts the plan.

Appendix F — Company Safety Plan (added Nov 12, 2026)

This appendix carries the full text of the Company Safety Plan (standalone document, November 2026), so the plan lives in this manual as well as in the signed copy each employee acknowledges.

Mr. Handyman of South Charlotte — TimIng Services LLC

Draft — November 2026 · For review by Tim & Ingrid Steffens

1. Our commitment

Protecting the safety of our employees and our customers is the most important aspect of running our business. Every employee has the opportunity and the responsibility to contribute to a safe work environment — by using common-sense rules and safe practices, and by notifying the office whenever a health or safety issue is present. This plan puts most of its weight where most of our risk is: on our Service Professionals (technicians) working in customers' homes.

Two rules override everything else in this plan:

- STOP-WORK: Any employee who believes a task cannot be done safely must stop, make the area safe, and call the office. No one will ever be disciplined for stopping unsafe work. Ever.
- REPORT IT: Every injury — no matter how minor it seems — and every near miss and unsafe condition gets reported to the office the same day. In an emergency, call 911 first, then the office.

2. Every technician's responsibilities

- Follow this plan and the safety training you receive; ask the office before doing any task you have not been trained to do.
- Inspect every tool, ladder, and cord before use. Tag out and report anything damaged — never use damaged equipment.
- Wear the PPE the job calls for: safety glasses for cutting, grinding, drilling overhead, and chemicals; gloves for demolition, chemicals, and sharp materials; hearing protection for sustained loud tools; a dust mask or respirator for dusty work.
- Keep the work area clean as you go — cords routed, debris picked up, walkways clear for the customer, their kids, and their pets.
- Never work impaired. Our workplace is drug-free and alcohol-free (see the Employee Handbook).
- Fatigue is a hazard. If you are too tired to work safely, tell the office — we would rather reschedule than risk an injury.

3. Ladders and working at height

- Inspect the ladder before every use — rails, rungs, feet, locks.
- Set up on firm, level ground; extension ladders at the 4-to-1 angle, extending 3 feet above the landing, tied off or held where practical.
- Keep three points of contact climbing; face the ladder; never stand on the top two rungs of a step ladder or the top three of an extension ladder.

- Never overreach — climb down and move the ladder.
- No ladder work alone in high or awkward spots — call the office for a second set of hands.
- Roof work and anything beyond our trained scope: stop and call the office.

4. Power tools and equipment

- Guards stay on. Safety switches are never taped, tied, or defeated.
- Unplug the tool or pull the battery before changing blades, bits, or making adjustments.
- Clamp the work — never hold a piece by hand against a saw.
- Match the tool to the job, and never use a tool you have not been trained on.
- Watch cords for cuts and fraying; keep cords out of walkways and away from water.

5. Electrical safety

- Treat every circuit as live until you have turned it off at the breaker AND verified it dead with a tester. Every time.
- Water and electricity never mix — no electrical work with wet hands, wet floors, or in rain.
- Stay inside our scope: device and fixture swaps we are trained for. Panel work, new circuits, and anything you are unsure of — stop and call the office.

6. Plumbing and water

- Know where the shut-off is — and test it — before opening any line.
- Protect the customer's home: towels, buckets, and drop cloths down before the first fitting moves.
- Suspect mold, sewage backup beyond a simple stoppage, or a gas smell? Stop, leave the area safe, and call the office. A gas smell means leave the home and call 911 / the gas company from outside.

7. Driving and vehicle safety

- Seatbelts, always, for every occupant. No exceptions.
- No phone or tablet use while driving — calls, texts, check-ins, and estimates happen parked. (See the Company Device Agreement.)
- Secure tools and materials so nothing shifts or flies in a sudden stop; never overload the van.
- Back in or use a spotter where practical; walk the area behind the van before reversing.
- Any accident: check on people, call 911 if needed, then the office — before leaving the scene.

8. In the customer's home

- Protect floors and belongings — drop cloths, shoe covers, corner guards where the job calls for them.
- Keep tools, cords, and materials out of walkways; flag anything a customer could trip over.
- Be alert for children and pets around the work area; ask the customer to keep them clear of active work.
- Leave the area cleaner than you found it — a tidy site is a safe site, for the customer and for the next visit.

9. Heat, weather, and outdoor work

- Charlotte summers: hydrate before, during, and after the job; take shade breaks; know the signs of heat illness (dizziness, nausea, confusion, stopped sweating) — in yourself and your partner — and act on them immediately.
- Lightning: stop outdoor work and get inside at the first thunder; wait 30 minutes after the last thunder to resume.
- Cold and ice: slow down on ladders, roofs, and walkways; if it cannot be done safely, it gets rescheduled.

10. Chemicals and materials

- Read the label before you open it. Follow its PPE and ventilation directions; safety data sheets are available from the office.
- Never mix chemicals — especially anything containing bleach or ammonia.
- Store chemicals upright, sealed, and secured in the van; never in food or drink containers.

11. Reporting — injuries, near misses, hazards

- Injuries: notify the office immediately, regardless of how insignificant the injury may appear, so medical attention can be arranged if needed. (Employee Handbook — Commitment to Safety.)
- Near misses and hazards: same day, to the office. A near miss reported is an injury prevented.
- Emergencies: 911 first, then the office.
- No one is ever punished for reporting. Reporting is how we take care of each other.

12. Training and review

Safety is covered in onboarding and in the tech training modules (including Module 6 — Safety & Scope Limits), and in periodic refreshers. This plan is reviewed at least once a year by the owners and updated as our work changes. Questions, suggestions, and hazard reports go to the office — every one of them is welcome.

Employee acknowledgment

I have received, read, and understand the Company Safety Plan. I agree to follow its safe work practices, to stop work I cannot do safely, and to report injuries, near misses, and unsafe conditions to the office the same day.

Date _____ Employee _____

Date _____ Employer Location Manager _____

Appendix G — Company Device Agreement — iPad & Phone (added Nov 12, 2026)

This appendix carries the full text of the Company Device Agreement — iPad & Phone (standalone document, November 2026), together with the device breakage policy decided Nov 12, 2026, stated plainly below. The agreement's terms 6 and 7 say the same thing in agreement language.

Device breakage policy (decided Nov 12, 2026)

- Accidental damage in the course of the work: the company pays.
- Loss or negligence: the employee pays at the device's depreciated (current) value.
- A device not returned at separation is billed to the employee.

The agreement

TimIng Services LLC, dba Mr. Handyman of South Charlotte

Date: _____, by and between _____ (Employee) and TimIng Services LLC, dba Mr. Handyman (Employer).

The Employer issues the company device(s) listed below to the Employee for use in performing their work. One signature covers every device listed; if a device is replaced or another device is issued later, the office updates the list and both parties initial the change.

Device(s) issued

Device	Make / Model	Serial No. / IMEI	Phone number	Accessories issued	Date issued
iPad					
Phone					
Other					

The Employee agrees to the following conditions:

1. The device, and all information on it, are company property; however, ultimate liability for misuse rests with the user. The device should not be used to publish, store, or distribute offensive or inappropriate material. As a company device, there is no confidentiality with its use, or the information and materials stored on it.

2. All usage should be company related, including check in/out, phone calls and texts with customers and the office, invoicing customers, taking work related pictures, researching material cost, driving directions, completing estimates for work related projects, and the ServiceTitan Field app. Watching video related to products, materials, or 'how to do' a work-related task is an approved use. Watching other videos or using the device for any other 'non-work' use is prohibited.

3. The employee will be responsible for data charges above and beyond 'normal' use. No applications will be downloaded/installed without the authorization of the office beforehand.

4. Do not leave the device unattended, in the very hot or cold van, where it may get damaged or stolen. While it is in a protective case, it is not indestructible. Treat it as if it were your own.

5. The device should be kept charged and available as required for business needs. The employee must take the device along when leaving home for work each morning.

6. You will notify the Employer if there are problems or damage to the device. Accidental damage in the course of the work is the Employer's cost. The employee is financially responsible for lost devices, accessories, and damage due to loss or negligence, at the device's depreciated (current) value.

7. You agree to return the device, charger, cables, protective case, and anything issued along with it as requested by the employer for updates, maintenance, or at the end of employment. Devices and accessories not turned in at the end of employment will be billed to the employee.

8. The device should not be used while driving. Checking in/out, estimates, communication with the office, or other use of the device, should only be done when the vehicle is safely parked.

By signing below the employee confirms their understanding of the above policies, and that violation of these policies may lead to discipline up to and including termination.

The Employee hereby acknowledges receipt of a copy of this agreement and agrees to its terms and conditions.

Date _____ Employee _____

Date _____ Employer Location Manager _____