January 2023

HALO UNIVERSITY

TECH PLAY BOOK

Customer service philosophy

Provide our customers with exceptional service by exceeding their expectations of quality, professionalism and cleanliness at the property. Extend that relationship year after year through consistently working to impress them, their friends and family.

Customer service is the sum total of the experience the customer has while in contact with any of our literature, vehicles or team members. Everything we do is either improving or harming customer service

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Job Description

Job Title: Chemical/Pest Technician
Department: Production
Reports To: Jake Giffin

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other Duties may be assigned.

- Keep in communication with office with all details outside of your normal day.
- Completes all necessary paperwork in accordance with company policies.
- Input all chemicals properly into web application
- Service customers with 5 star quality
- Upsell services as needed by the customer
- Leave 5 door hangers on homes adjacent to treatment.
- Keeps vehicle maintenance up to date.
- Treat all properties in accordance with S.P.C.B and HALO's Policy
- Turn in all paperwork the same day.
- Maintain current CDL with fewer then 1 point.
- Maintain a list of emergency rooms.
- 1983. Handling, Use, and Storage of Pesticides. (a) Each container in which any pesticide is stored, carried or transported shall be adequately labeled in accordance with the provisions of Articles 1 and 5, Chapter 2, Division 7 of the Food and Agriculture Code (relating to economic poisons) and regulations adopted by the Department of Pesticide Regulation thereunder.

SUPERVISORY RESPONSIBILITIES
NONE

QUALIFICATIONS
To perform this job successfully, and individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

EDUCATION and/or EXPERIENCE
- Branch 2 & 3 Applicator License
- Physical Demands
- Climb one- and two-story ladders. Lift 25 lbs, crawl into sub-structures and attic spaces. Look up for 10min periods at a time.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
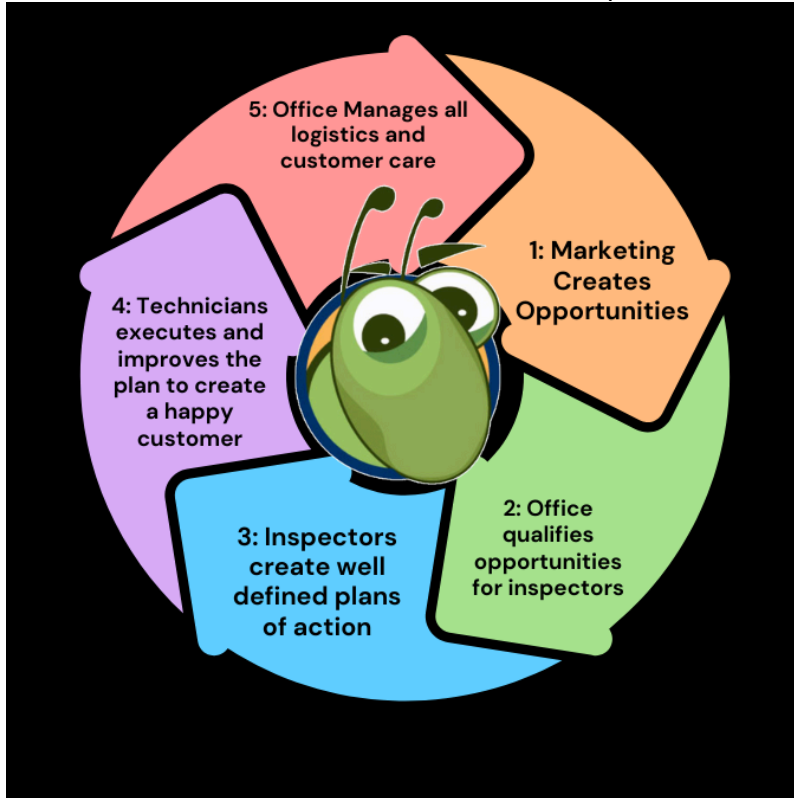
Creating an interdependent culture at HALO Home Services is crucial for building a healthy company and fostering customer satisfaction. The outlined "Cycle" illustrates the seamless flow of responsibilities, highlighting the significance of each department's role. Let's break down the key steps:

1. **Marketing - Generating Opportunities:**
   o   Initiates the cycle by creating opportunities for the company.
   o   Sets the foundation for customer engagement and growth.
2. **Customer Service - Qualifying Opportunities:**
   o   Plays a vital role in maintaining the cycle by ensuring that opportunities meet the company's standards.
   o   Acts as a gatekeeper, filtering and qualifying potential business.
3. **Inspection - Detailed Planning and Expectations:**
   o   Conducts meticulous inspections, outlining clear plans of action.
   o   Sets proper expectations, laying the groundwork for successful execution.
4. **Technician - Executing Plans and Ensuring Satisfaction:**
   o   Executes the plan of action with a focus on excellence.
   o   Strives for continuous improvement, enhancing customer service and professionalism.
   o   Hands back a satisfied customer to the office, completing the cycle.

Inter-Departmental Dependence:

- Emphasizes the interconnectedness of departments.
- Any break in the cycle impacts everyone, underlining the importance of each team's contribution.
- Identifying individuals not maintaining their part of the cycle is crucial for the company's future.

Cultural Aspect:

- Promotes a culture of accountability and excellence.
- Encourages teamwork and mutual reliance for the success of HALO Home Services.

- Substandard cycle maintenance is recognized as detrimental to the company's future.

In summary, the success of HALO Home Services depends on the seamless execution of the cycle, with each department playing a pivotal role. Identifying and addressing any lapses in maintaining the cycle is essential for the company's sustained growth and customer satisfaction.

TIME CLOCK PROCEDURES

Your time clock will be found in ADP Mobile downloaded on your phone. NOTE: ADP Mobile is where you will find answers to future benefits and access to your "Life Advisor". If you have any HR or any other questions it will be your Life Advisor that helps you.

Technicians are to clock into their first stop no later than the first designated time on the schedule. Example: If a customer is scheduled between 8 to 10 you must arrive at 8am. If the first customer of the day is scheduled at 10 to 12 you must arrive at 10am.
HALO does not pay for the average commute to work which is one hour. How to manage your time below.

If my first stop is 1 hour from my home. I will leave my home at 7am and clock in 1 hour later at the customers home at 8am
If my first stop is 2 hours from my home I will leave my home at 6am, CLOCK IN at 7am, and arrive at the customers home at 8am. The chart below will help you manage your time clock

One hour commute: Clock in at 8am Clock out for lunch NO LATER THAN 12:59
Lunch is 1 hour. Clock back in at 2:00pm and then clock out when you arrive at home.

Two hour commute: Leave home at 6am CLOCK IN at 7am. Clock out for lunch no later than 11:59
Lunch is 1 hour. Clock back in at 1:00pm and then clock out when you arrive at home

TOTAL PRODUCTION GOALS

Your goal as the technician in and as far as it depends on you is to complete $44,000 worth of production per month.

TECHNICIAN PERFORMANCE METRICS

All roles have performance metrics that assist management in determining if someone needs for training or oversite. The pay for the technician should be no more than 9.5% of the weeks or months production.
Example of 9.5 in real life. Assume the technician makes $23 per hour and has a $1600 day. It takes the tech 8 hours to complete his/her day. $23X8 equals $184. However 9.5% of production is $152. In this example the technician went over by $30 equaling 11.5%. Ideally the tech would have completed his/her day in 6.6 hours to stay in the proper range. This metric is tracked over weeks and months to gather an average. Someone who is consistently over may show signs of a lack of job efficiency. A technician that is consistently under, lets say by 3%, averaging a 6% efficiency either needs a raise or is rushing and missing areas of treatment. While there are several things out of the technicians control, it is important to keep an eye on this number.

REVIEW GOALS

HALO technicians should have honoring our customers as the main priority of their visit to the home. By doing so you will earn 5 star reviews on Yelp, Angi, Thumbtack and other sites. Technicians **must maintain 5 or more** reviews per month.

CLOVER LEAF

Clover leafing is an important part of supporting the HALO marketing effort. Both you and the inspectors are required to drop door hangers on homes adjacent to the ones that we inspect and treat with the goal of spreading the HALO message of high quality treatments at a fair price. Any leads that you personally call into the office, from your interaction with neighbors, will earn you $60. Someone who got only 5 per month would earn $300

FURTHER TRAINING

At HALO your career is in your own hands and in your control. Once you, with management, decide on a path of success that you want to take you will implement that plan and be accountable to accomplish it. HALO will reimburse any expenses related to your development that has a positive impact on the HALO business. Simply submit a reimbursement form once you have passed the tests that you have taken. Go to www.pested.com create an account and decide what courses to take. Once you pass the tests and obtain your license you will be reimbursed for your course.

SCHEDULE:

First appointment by 8:00am. Official Hours are from 8:00am until all reports are done for the day and all minimum daily behaviors have been completed. Monday – Friday. Saturdays are possible upon request and if work is available.

HALO DRIVING POLICY

Any employee driving a company vehicle must at all times Maintain a current, valid and clean driver's license.

i.e. remain insurable under our company's liability insurance policy.

HALO will perform periodical checks of all DMV records.

Drive within the posted speed limit at all times. You should drive at speeds that are safe for the conditions, when in rain and/or fog this may mean driving below the posted speed limit.

You must always follow all State Driving Laws

You must always stay within 5 miles of your daily route.

After hours vehicle must be parked at address listed with the office

Vehicles driven home must be parked in a safe and secure location until the beginning of your next working day.

Vehicles are not to be driven for personal use.

You are not at any time have any passengers in your vehicles that are not HALO employee's

No Smoking in any HALO Vehicle

INSURANCE POLICY REQUIREMENTS

For the company to comply with its obligations under its insurance policies:
No employee under 18 years of age is allowed to drive a company vehicle.
Driver information and application forms must be approved by the Manager before any employee is assigned to drive a company vehicle. A motor vehicle report will be obtained on an employee that must verify a satisfactory safe driving record. A satisfactory safe driving record must be maintained if the employee is to continue driving a company vehicle or use a personal vehicle for business purposes. The Company reserves the right to conduct periodic motor vehicle reports to verify continued compliance with this policy. An employee can have no more than 1 point on their record.
Our insurance carries specific restrictions and no exceptions will be made to these policies.

GPS ON VEHICLES
HALO vehicles are equipped with tracking GPS with the main goal of controlling insurance costs and policy adherence. Any tampering with the device will result in policy violation write up.

FUEL CARDS
Fuel cards are for fuel only. Any attempts to purchase general merchandise will result in disciplinary action.

TOLL ROADS
If your HALO vehicle is equipped with a FAST TRACK sticker you may use the lane at peak traffic hours to avoid long traffic waits. Do not use it if there is no traffic to avoid.

SAFETY GUIDELINES
All trucks are to have labels and SDS sheets.
Goggles, safety glasses, respirators and gloves are to be worn at all times during chemical application.
Please have chemicals locked on the truck at all times.
Read the pesticide series N information sheet. N-1 & N-6
Ladders must be used at the osha

DOG POLICY
It is HALO's policy that our employees should not be working around dogs. Even dogs that do not bite can be intimidated or scared by the normal use of our tools. It is your responsibility to ask the customer to remove all dogs from the work area.

Mr./ Mrs. _____I you don't mind can I have you put the dog in another area during my treatment/ Inspection. Our company has a policy that does not allow us to work around dogs. Thank you

NO ILLEGAL DRUG POLICY.
For the safety of our employees and customers HALO Termite and Pest Control is a drug free workplace
We reserve the right to randomly and with suspicion test any employee at any time for illegal substances.

VEHICLE MAINTENANCE

You are responsible for the condition of your vehicle and equipment
If your vehicle is considered to be abused it could result in disciplinary action up to and including termination.

- Once per week conduct a complete inspection of your truck including tires, oil etc
- Oil is full and oil change is current. Oil changes the last Friday of the Month
- Equipment is clean
- Ladder is in good condition
- All equipment is on the vehicle
- Spare tire changing tools
- Spare tire
- Vehicle is clean
- Tires are at standard PSI
- Windows clean
- Interior clean
- Exterior clean
- Current registration (in glove box)
- Current insurance (in glove box)
- Items needed or in need of repair request it from the office Fill out request form (I told someone about it a month ago does not cut it)

Truck Inventory

Inventory for all work is maintained on the vehicle. Any purchases of Chemicals or supplies get sent to the office for log. You are responsible for conducting and submitting an inventory list every week to your manager and the office.

LICENSES

You are responsible for maintaining your licenses. This includes your licenses transfer paperwork to the structural pest control board, CEU and associated fees. HALO reimburses for all courses, once passed, for employees that have maintained their part of the cycle and have met all of the requirements for this job.

RULES ON EVERY PROPERTY

- Always wear a HALO Provided shirt and approved pant
- Check into the FieldRoutes app as soon as you arrive 8am. Checking into the property notifies the homeowner and the office that you have arrived
- Always knock before entering a house
- Always wear booties in the house
- Always use a drop cloth under ladder
- Always make sure clothes are covered or removed in closets with attic entrances.
- Always make sure your hands are clean prior to opening and closing attic access.
- Always make sure attic access is clean before you leave.
- **NEVER PARK THE VEHICLE IN THE DRIVEWAY**. If this is unavoidable place a tray under the oil pan of the vehicle to avoid any oil leaking onto driveway
- Check OUT by "completing" appointment and entering all data required. Time in and time out. Chemicals used, get homeowner signature and sign your signature.

Customer Service is KEY

Once you arrive you will check into the account on Pest Routes. A message will be sent letting the customer know that you have arrived. The following is an outline of every stop.

GREETING: "Good morning Mr./Mrs/ _____ my name is _____.I have been assigned to save your home today. You will see me looking at my phone often. (Show them the field sheet on your phone) don't worry. I'm not texting my wife or doing any shopping. I am referencing the field sheet that your inspector _____ created for you. Ill be using this as my starting point all the while looking around for any other areas that need to be addressed. If you or I have any questions about the program we will both **defer to the inspector** as he is the authority on the property. Does that sound ok? Great"!

PRE-WALK: The pre-walk helps you identify any damage to the property that may already exist before you get started. You will note the existing damage and point it out to the homeowner. This could be scratch stucco, broken window, broken sub or attic door. Take pictures and upload it to their account.

"First Ill do a preview walk around the property to scope things out and then I will jump in the attic. You are welcome to come with me unless you need to make the attic available?"

"Once I am done doing my pre-walk Ill start the treatment in the attic and then work my way around the property systematically. Once I am finished I would like to walk you around to show you what we did. Is that ok?"

DOES YOUR PAPERWORK INCLUDE GUARDIAN?: I noticed that your project includes a Guardian upgrade. That is an awesome way to protect your attic long term. Ill do that before I start on the outside.

UPSELL Opportunity #1
DOES NOT INCLUDE GUARDIAN: Did your inspector happen to mention long term prevention of drywood termites and how we accomplish that? NO. What we do, roofers and builders love it, is spray all the open framing with a liquid salt that prevents termites from being able to survive when they fly in

to the attic. Its also a great wood preservative and fungus preventative. They pay us $1000 to do the treatment but if you want I can do it while I'm here for an additional $400. What do you think?"

DEFER TO INSPECTOR
If the customer has questions, concerns or attempts to get you to do anything that is not included in the treatment then follow these steps. FIRST: Listen to what they want SECOND: Acknowledge that you understood their request. THIRD: Make this statement "I would be happy to help. Let me just defer to the inspector for permission so that I don't get in trouble. Is that ok?"   NEVER SAY: " I don't do that" Have the inspector call to let them down easily or to charge them for the service. You are not to be the bad guy. You are here to impress and fulfill your part of the cycle.

JOB COMPLETED: Once the job is completed, all infestation drilled, patched and evidence covered, then you will walk the customer around the property. Reference the field sheet and point out the areas treated. Make sure to draw their attention to the discreet drilling and patches that make it seem invisible. If you treated anything that was left off of the diagram, point it out. Let them know what a good job they received from you. (BTW This detail often leads to tips and 5 star reviews.) Often a tip of $20 plus $35 for a 5 star review that mentions your name = $55

UPSELL OPPORTUNITY #2
I noticed that you have quite a bit of spiders and ants. Have you ever considered a monthly or bi-monthly pest control service?
The initial treatment is usually $245 plus $110 per month. If you want to start a program today I can do the initial for only $99 and lock in a monthly price of $90 or Bi-Montly at only $110. Is that something that would interest you?
NO. "No problem. If you change your mind just let us know"
YES " Great. Ill write it up for you and have the office add it to your payment today. Ill do the initial treatment before I leave"

PAYMENT:
It looks like you have a balance of $_____. If you pay with credit card that will go up by 3%. To avoid that you can write a check. Which do you prefer?

FINALLY 5 STAR: One last thing. My boss loves it when I earn 5 stars. If I've earned 5 stars with you today would you be kind enough to mention my name _____. in your online review?

Have a great day. Thanks again for your business. We appreciate it

BEFORE YOU DRIVE AWAY: Accurately input your chemical use into Pest routes. Make any notes as necessary. Upload any additional photos that you may have. Once everything is inputted complete the appointment

MAKING WHAT YOU ARE WORTH: At HALO we believe that you should make what you are worth. While your role at a tech will earn you an hourly wage you have an opportunity to make much more by following the above outline which leads to more tips, sales and reviews.

Example: The average tip is $20
5 star (Yelp, Google, Angi) review that mentions your name $35
Guardian Upsell $28
Pest Control Upsell $7.00 + Residual as long as you are with HALO
        Residual income: Every time a pest control customer is serviced that you sold will earn you $7
        This is not trivial. Multiply that with however many pest control customers you can sell and you

could make well above your hourly rate

What if I got a TOUCHDOWN? A touchdown is ALL OF THE ABOVE. You would earn an additional **$90** plus your hourly wage. Do the math: What would it take for you to be at $70,000 per year within 3 years? Set goals and work to hit them. Challenge yourself and you won't be disappointed.

CALLING OUT SICK

As a small to medium size service company HALO success is predicated on consistent, predictable, execution of work. If you get sick Please call in to your office CSR staff, give us the maximum amount of notice possible minimum 2 hours or by 6am the morning of work if not much sooner.

THE TREATMENT:

We do complete thorough treatments.

- Start with a walk around the property to make a PRE-TREATMENT damage checklist. This form is available in the office. Note all pre-existing damage to the home before getting started on treatment.
- Next start your treatment in the attic. Drill treat and cover all droppings.
- Look for other areas in the attic that need to be treated that may have been missed by the inspector
- Mask all termite evidence with concrete dust, vacuum or sweeping
- Complete all exterior from the top down moving with the shade if possible around the home
- 8619. (a) An inspection tag shall be posted whenever an inspection for wood destroying pests or organisms is made. **(b) If the registered company completes any work with respect to wood destroying pests or organisms, it shall post a completion tag next to the inspection tag.**
- Once treatment is complete your post-treatment review with customer showing them everything that you did on the diagram, their home and any additional areas that you located and treated
- Collect payment.
- Have customer sign their work order completion on PestRoutes
- You sign the work order completion on PestRoutes
- Collect payment from customer.
- Ask for your 5-star review
- Complete appointment and go to next stop

APPS THAT YOU NEED

ADP Mobile	Gmail
FieldRoutes	Workplace by Meta
Navigation (waze, maps etc)	

Allowing Pestroutes to have access to your location while at work is mandatory. This allows maximum customer service as you utilyze it to safely tell the customer when you are on your way. This is done simply by pushing a button. No calling necessary. Once you arrive you will check into the stop and the customer will be notified of your arrival. You will have pest routes open the entire time that you are clocked in and will use it often to update customers and their accounts

New Treatment Expectations

Treatment Expectations: Treat customer properties for infestation of Dry wood termites, Subterranean termites, Fungus/Dry Rot, conducive conditions, wood damage, Rodents, general pest, insulation and provide remedy. Complete completion tag left by inspector or post one of your own in the garage.

MINIMUM DAILY BEHAVIORS

It is important to go into every day with the proper mindset. The proper mindset is based on expectations and goals. Below are the expectation and goals for the professional technician.

- Get to your first appointment by 8:00am
- Drop at least 5 door hangers
- Stay in communication with the office
- Turn in ALL paperwork as soon as you are finished with the appointment.
- Wear booties and use drop cloth on every stop
- Never park in the driveway unless it can not be avoided. In those cases make sure you place your crawl pan underneath engine to capture any possible leaks

COMMISSION POLICY

IN HOUSE TERMITE SERVICES: Techs can earn extra money by upselling services.
Full commission is paid on all in house jobs when it meets 4 criteria
- The job is completed
- The job has been paid for
- The job was priced according to rate card or over
- You didn't give anything away for free without permission (Extra warranty, pest spray, guardian etc.)

Full commission means 10% of any in-house service sold. A deduction of 5% commission will occur if the job falls under rate card. Prices on rate card are the price that we need to get. Your jobs must be sold for a total equal to or above that number.

PAPER WORK

All sold jobs must be accompanied by a deposit of no less than 10% and a SIGNED contract. It is the responsibility of the salesperson to obtain all paperwork in the event the office is not able to do so.

HALO Services

ADVANCE DRYWOOD TREATMENT
BY HALO HOME SERVICES

ADVANCE: HALO Advance is our drill and treat method for treating drywood termites. Dry wood termites are identified on your field sheet as the number 2 with a letter next to it. For example 2A, 2B.
The number 2 represents Drywood termite. The letter represents the location

(Rafter tail, fascia, etc) Follow the label for TERMIDOR SC

You will use a ⅛ in drill bit to create a diamond pattern to treat each infestation. Illustration below. This pattern is a tested pattern proven by the University of Riverside however if you fail in getting the product into the gallery…you failed to treat.

Note: Your drill pattern needs to be as discreet as possible. For example. An infested fascia board should be treated from the back if possible as to avoid showing drill marks on the home. Rater tails should be treated on the opposite side facing the street so that it the holes are not visible from the front of the home.
 In cases such as Cantilevers, patios and trim, you may be able to drill from the top and allow the product to soak. In these cases you may not be able to do a DIAMOND. When drill patterns are not visible you MUST take a photo of area and upload it to the customer account as (Discreetly treated) and a note to how.(From the top etc)
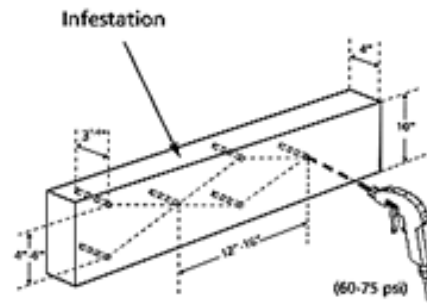

Figure 1: Drill and pressure injection of a 4" x 10" structural beam with *Tim-bor* solution.

Treating Highly Infested Rafter Tails

When a rafter tail, which runs TOWARD the home, is highly infected it must be assumed that the infestation extends into the wall. Note framing diagram under construction. When wall infestation connected to rafter tail is possible ADVANCE requires 2 things. **First** drill and treat the rafter tail in such a way that as much of the product as possible remain in the lumber. A diamond may not be possible in highly damaged lumber. **Second**: Use the long ⅛ inch drill bit to drill deep into the rafter tail over the wall, past the blocking. This will get treatment into hard to reach areas in the attic. You will want to use foam if possible. PRINCIPLE: When defying gravity use foam when possible. **THIRD**: Drill and treat the blocking, shiplap and fascia. **FOURTH**: Use your long drill bit to drill and treat the top plate. This will happen inside the home, where the wall and ceiling meet. Drill at an angle that will allow access to the TOP PLATE. Once drilled use your BILLOW Duster with POWDER inside to treat the top plate.

Treating Attic Rafters

You will use the diamond drill pattern in the attic. You want to use gravity. Drill as high up as possible to get product into the gallery and allow it to run downward. PRINCIPLE: Any time that you can allow gravity to assist in a treatment, be it, rafters, vertical trim, etc you should use it. Drill high and allow the product to funnel downward.

Dusting Adjacent Windows and Doors

ADVANCE often includes dusting adjacent windows and door frames. If this is the case you will DISCREETLY drill where the trim meets the wall. Do not let the drill chuck touch the wall. BLOW timbor dust into the void with your billow duster. Not included in the pictures below is a STUD Finder which is essential to have for treating studs.

PRODUCTS USED IN ADVANCE: Termidor SC TImbor dust

PATCHING: We patch using a similar color patch as is on the home. You should come as close as possible to the color of the home. White, Light brown, dark brown, black patch should be available on your truck at all times.

TREATMENT EQUIPMENT
EQUIPMENT FOR ADVANCE TERMITES

1/8 Inch drill bit   12 Inch 1/8th in drill bit

Patch: Tan, Light brown, Dark Brown & white ready patch

Accuspray

Wood injection tip You should keep 4 spares on the truck at all time. You also need a 4" injection tip in case the need to treat into wall studs is necessary. Used with the 12 in 1/8" drill bit.

Accuspray repair kit. You should have 2 of these at all times in the event that your accupray needs maintenance.

BLOCKADE
Western Subterranean Protection

The service provided by HALO for Subterranean termites is called BLOCKADE. Subterranean termites are indicated on the diagram as the number 1. Subterranean colonies consist of up to 1,000,000 members that forage for food by traveling through tubes that they build with moisture and and dirt. The queen, that lives 30 feet underground, lays 2000 eggs per day. BLOCKADE is designed to place a treatment barrier around the property that will contaminate the workers causing them to take the product to the queen and thus eliminating the problem. Any gap in that treatment zone is a vulnerability in the treatment. Follow the label for TERMIDOR HE

RAISED FOUNDATION: Treatment occurs underneath the home by digging a 2 X 4 Trench around the interior foundation wall, around piers and pillars, placing product into trench 1 gallon per 10 linear feet, and then placing dirt back into trench to cover product.

SLAB FOUNDATION: You will drill ½ in holes every 18 inches around the property 6-12 inches from the wall. Sweep and KEEP the dust drawn from holes. You will use this later to color the new concrete patch. Use the skinny "Slab injection rod" with 360 degree tip. Inject for 3-4 seconds, slightly rotating tip, per hole until finished. Place equipment back into truck. Place concrete plugs at least 2 inch into each hole. Mix concrete and place into each hole coloring the new concrete, with the old dust, thoroughly. Drilling slab means risking hitting pipes. To avoid gas lines make sure you use your tool interrupter. Plug interrupter into the home and then plug your drill into the interrupter. This will stop the drill if you hit metal. You will want to pay close attention to the location of irrigation pipes. Note which way they are running and avoid them.

SENSITIVE MATERIALS
You may experience delicate pavers or areas where the customer will not allow drilling. In this case how do you complete the perimeter? One way is to foam the wall of the home at the areas that can not be drilled. You will also want to dust those areas for more protection. In this case drill through the dry wall into the void to foam and dust.
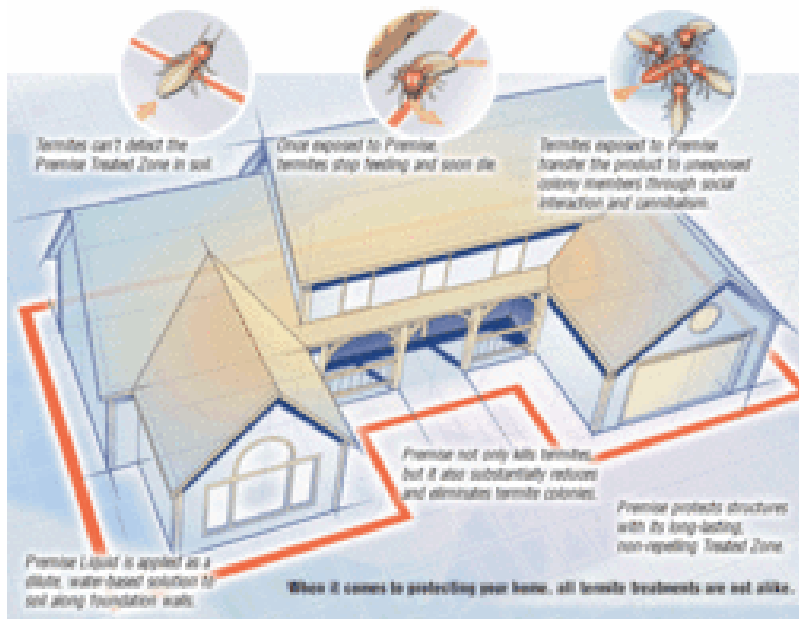
SUBTERRANEAN TREATMENT EQUIPMENT
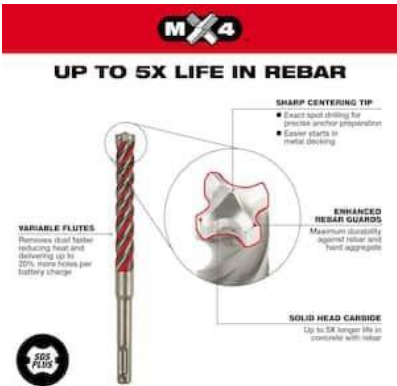
Rotohammer and ½ Concrete drill bit

Concrete plugs and concrete to fill in drill holes. NOTE: We sweep up the old concrete dust created by making holes to use as coloring for the new concrete patch.

Universal ROBCO gun to be used with a skinny rod for slab injections and a FAT rod for soil injections. Do not use the skinny rod for soil and make sure you have a 360 degree tip on either

Do not drill through concrete without using this tool interrupter. This is the only thing that will keep you from drilling through metal pipes.

SERAPH

ALL WDI

SERAPH is the combination of ADVANCE & BLOCKADE. You will follow treatment procedures for each of these services as listed above. The muscle on this service is the warranty. It covers dry wood, subterranean termites, wood boring beetles, carpenter ants and carpenter bees. If you see any of these pests treat them and note the account.

GUARDIAN TERMITE PREVENTION
A HALO EXCLUSIVE SERVICE

GUARDIAN is HALO's preventive treatment for open framing. You will notice this on the diagram and or customer notes. This service is sold one of 2 ways. From time to time the inspector will offer it for free as an upgrade with the goal of closing the deal. If there is not GUARDIAN listed on your work order you may feel comfortable upselling it yourself to make a 7% commission. Simply explain to the customer that "roofers and builders pay us $800 to do attic or garage treatments but I can do it for only $400 while Im here. This adds an additional layer of prevention against future infestation. Do you want me to do it?" You are required to note the upsell and notify the office so that they can adust the invoice. GUARDIAN is executed by placing one fifth of a gallon of BORACARE into a one gallon sprayer. Shake well and apply to damp. Wait a few minutes and then apply again. Use warm water if possible for easier mixing. Follow the label at all costs.

Exclusion
Construction Grade Rodent Exclusion

Rats can enter into a home through a hole the size of a thumb. The goal of exclusion is to seal all possible entry points following 2 principles. FIRST: It must be functional. Using concrete and wire in 99% of the areas. Dry wall holes must be closed up with drywall mesh and patch..NOT SCREEN. Black foam is allowed in tight to reach areas but it can not be visible and it MUST be mixed with steel wool. No other foams are to be used.
SECOND: It must be especially neutral. **You must not** distract from the look of the home. Exclusion is art and science in excluding rats from the home.

FORTIFY 360 is the only rodent control service of its kind. It includes the EXCLUSION plus 3 layers of yard protection. LAYER 1: The fence line where we place EVOLVE birth control poison. LAYER 2: In harborage areas with a killing poison and LAYER 3: Boxes against home with Traps.Monthly and Bi-monthly follow up options. Up

OTHER SERVICES: Monthly and Bi-Monthly Pest Control, Roach, Flea and Mosquito treatments.

SAFETY

OSHA Ladder Safety Guidelines:

Choose the Right Ladder:

Ensure the ladder is suitable for the task. It should be of the correct type (e.g., step ladder, extension ladder), material, and height. The ladder's duty rating must support the total weight of the climber, tools, and materials.

Inspect the Ladder Before Use:

Check the ladder for any defects, damage, or wear before each use. Look for loose rungs, cracked steps, or corrosion. Do not use a damaged ladder.

Set Up the Ladder Properly:

Place the ladder on stable and level ground. For extension ladders, follow the 4-to-1 rule: for every four feet of ladder height, the base should be one foot away from the wall or structure.

4 ft.

1 ft.
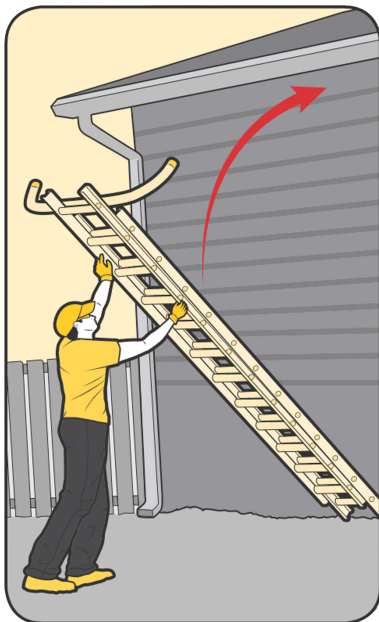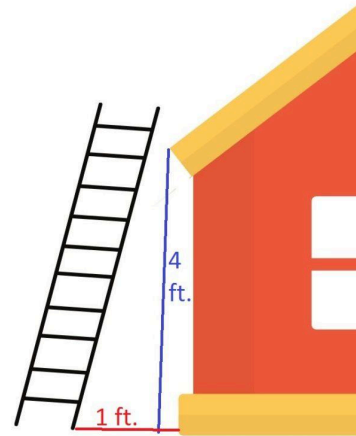
Climb Safely:

Always face the ladder when climbing or descending. Keep your body centered between the rails and maintain three points of contact (two hands and one foot or two feet and one hand) at all times.

Work Safely:

Do not overreach; keep your hips within the ladder's side rails. Do not stand on the top step or rung of a ladder. Never use a ladder in windy or inclement weather.

Walk the ladder as illustrated. Once Ladder is straight up move the bottom away from structure.

PestRoutes Tech: Inside an Appointment

Summary

Users will find PestRoutes Tech very intuitive and even those who are accustomed to its predecessor will find the adjustment period a smooth transition.

Check In

When a technician opens an appointment, a prompt pops up asking whether the technician would like to check-in.

It is recommended to only press *Yes* when the technician is on location.
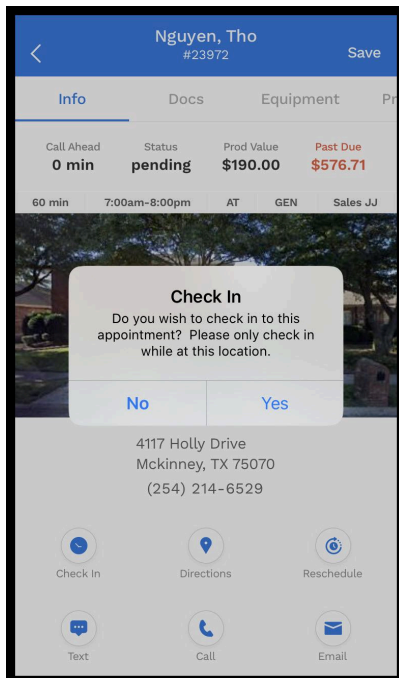
Info Tab

Immediately below the Info tab selection, you will find:
Call Ahead: Indicates to the technician whether the customer prefers to be contacted before their scheduled service. This can be set on the Subscription tab of the customer card for all future appointments or individually by opening up the appointment card.

Status: Tells the technician whether the appointment is pending, a no-show, or already completed.

Past Due: When the customer has a past due balance, it will be present in this section. If the

customer is current on their balance, then only the above two options will display.

Right above the image provided by Google Maps:

- ***Appointment Duration:*** Specifies the length of the appointment. The default is based on the service type preferences but the duration can be edited from the appointment card in the desktop software.
- ***Arrival Time / Window:*** Timed windows will show the exact range entered into the appointment card. Any time appointments display 8 am to 8 PM along with AT. Morning appointments put the time range of 8 am to 1 pm and display AM. Afternoon appointments have a range of 1 pm to 8 pm and display PM.
- ***Service Type Abbreviation:*** This shows the service type abbreviation as given in the service type preferences.

> **Salesperson Initials:** This displays the initials of the salesperson credited as the Sales Rep on the customer's subscription. The initials will be based on what is entered in that user's employee card.

Inside the property image, there is an important option as far as the customer's location is concerned.

> **Update Geocode:** Pressing this option displays a map with the customer's current location pin. The pin can be manually moved by clicking on a new spot to provide a more accurate reflection of their location. This can be especially helpful when the tech requests driving directions based on the geocode.

Underneath the customer's address and phone number:

> **Check In/Out:** Logs the technician's time of arrival and departure.

> **Directions:** A prompt asks whether to base the directions on the customer's address or by their latitude and longitude (geocode). When a selection is made, the default map app will open. To change your default map app, click on More at the bottom of the route view, choose Application Settings, and press *Choose Default Map App*.

> **Reschedule:** Gives the technician the ability to place the appointment on another day's route. The technician must have the correct Access Controls in order for this option to be available. See our guide on Access Controls to learn more about which configuration will allow for rescheduling.

> **Text / Call / Email:** Allows the technician to communicate with the customer. The contact information must be entered into the Info tab of the customer card.
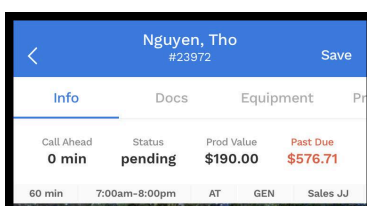
Info Tab- Continued

Following the icons for checking in, getting directions, rescheduling, and customer communication is more details concerning the customer's service.

> ***Service Description:*** This section contains details on the service type being performed. Additionally, it will show if and when the customer was sent any appointment reminders.
> ***Billing Action:*** This portion tells the technician whether there is no charge or if they need to collect payment.
> ***Customer Notes:*** Any customer flags or notes visible to the technician display here.
> ***Service History:*** This section contains a brief summary of the customer's previous appointments.
> ***Service Plan:*** A more in-depth look at the subscription being serviced is provided here. It will list the length of agreement, the frequency, how the billing works, when the next service is, and any notes or flags specific to the subscription.
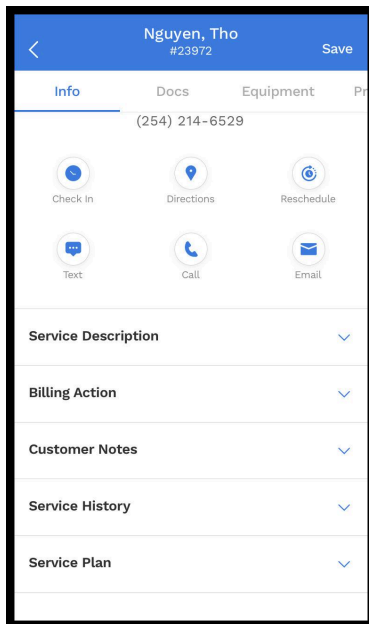
Info Tab - Customer Notes

Opening the Customer Notes section reveals information the Technician may need in performing the service. This information is not visible to the customer, but only within the system.

Red Notes (Internal): These communicate high-priority information from office staff. Text is highlighted in red.

Office Notes (Internal): Less urgent information can be stored here, such as a gate code.

***Flags:*** Office flags such as Locked Gate or Aggressive Dog appear here
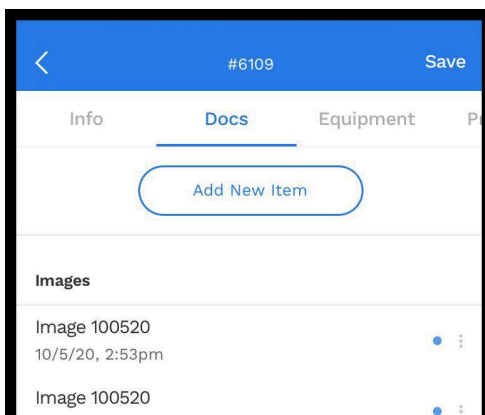
Docs Tab

Instead of a long list of all the customer's documents, there is an added degree of organization by breaking them up into different categories.

Images Diagrams Forms Contracts Other

These Category headers only appear when documents exist for that Category. Otherwise, they are hidden to facilitate easier navigation of the Docs tab.
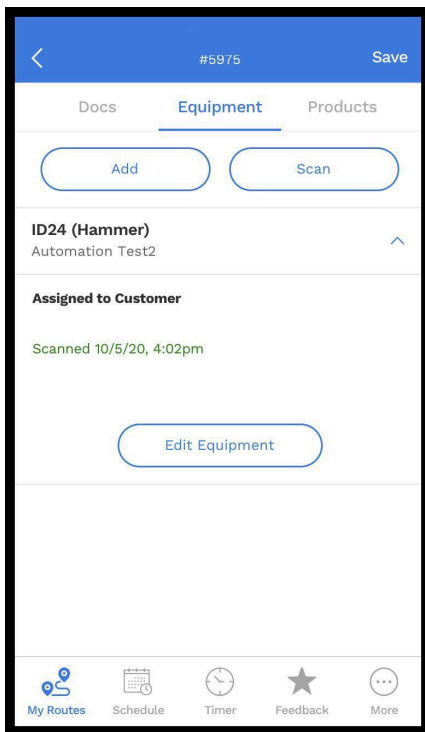
Equipment Tab

The Equipment tab allows you to either scan or manually enter equipment used at appointments. To add equipment, tap on the Add Equipment button at the top of the tab. If this is the first time that equipment is being added, the two options available will be to *Enter Manually* and *Add New*.
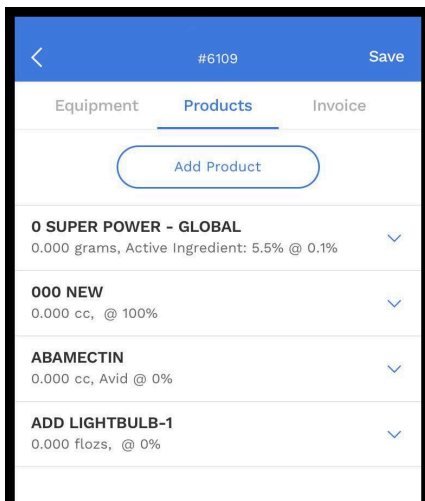
Products Tab

The Products tab serves to attach chemicals, bait, and other materials to the appointment.

For more information on adding and editing the user's list of Products, see our guide for Products.
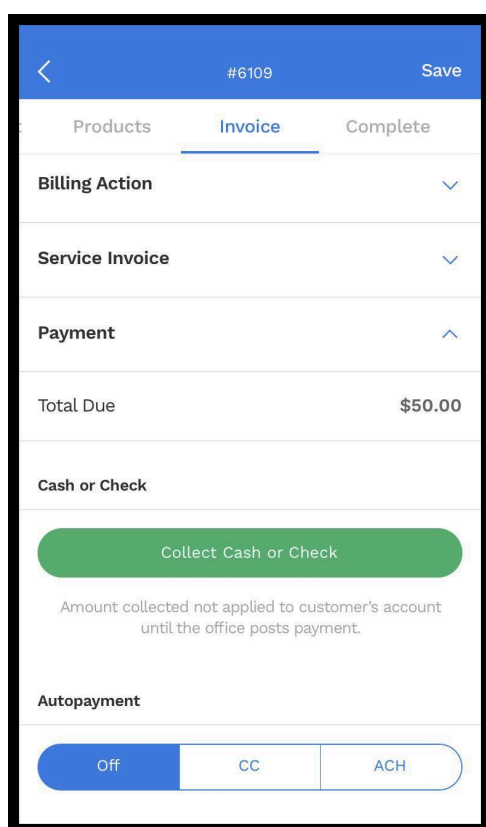
Invoice Tab

The Invoice Tab provides a review of the customer's Invoice before completing the Appointment. The following information is provided:

Billing Action: Shows the itemized charges on the current invoice

Today's Total: Provides the balance to be charged for the current appointment

Service Invoice: Summary of previous charges and payments

Previous Balances: Existing unpaid charges applied to this invoice
Previous Payments: Confirmation of prior payments received

Notes: Comments entered here appear on the customer invoice under Notes.

Add Preset: Preset responses such as Thank you for your business! can also be used by pressing the Add Preset option. See Admin > Preferences > Mobile > Preset Notes to create these notes.

Payment: Along with the amount due, it gives the technician the ability to enter in a customer's payment.
Cash/Check: To enter a cash or check payment, tap on the green Collect Cash or Check button. The details required will be the amount collected, whether it is cash or check, and check numbers when applicable. Once that information has been input, tap on the green Collect Cash/Check button.

Credit Card/ACH: Both payment account types will reflect if either is on file. The option to update the

payment account will be in blue. The option to charge the payment account displays in green.

> **NOTE:** If the current property has been linked to a different Customer who has payment responsibility (such as the owner of a rental house), then the payment options will be grayed out, and the party responsible for payment will be indicated to prevent double charges on the appointment.
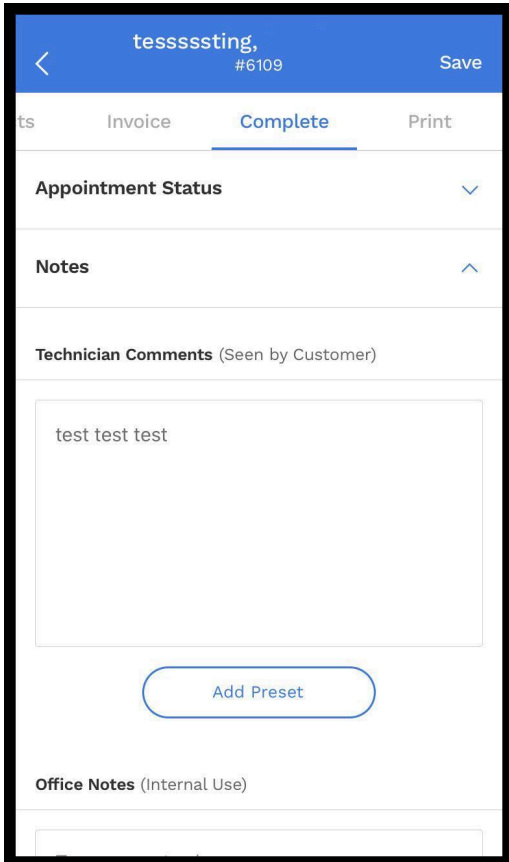
Complete tab

The Complete tab lets the technician put the finishing touches on the appointment's information

Appointment Status

Onsite Timer: Lets the technician check in and out.

In At: Displays the time of check-in.

Out At: Displays the time of check-out.

Status: Shows whether the appointment is pending, a no-show, or completed.

Interior Serviced: In the Route Summary Report, a column reports whether this toggle was turned on or not.

*Email:* Displays the customer's email address on file.

Notes: See details on Notes below.

Additional Details

Rig Used: Choose what spray rig is being utilized. To create and edit the spray rigs, navigate to *Admin > Preferences > Mobile > Spray Rigs* within the desktop software.

Square Feet: Enter the square footage of the property being serviced.

*Wind Speed / Wind Direction / Temperature:*Allows the technician to manually enter the weather information.
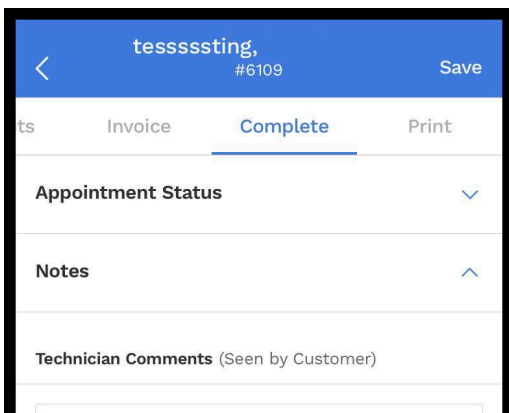
Apply Current Weather: Uses Dark Sky to pull the weather information based on the customer's latitude or longitude.

Signatures

Technician / Customer Signature: Both technician and customer have a field to input their signature. This can be done with a finger or stylus.

Complete Tab- Notes

Opening the Notes section allows a number of different Note types to be added:

Technician Comments (Seen by Customer): Notes entered in this field will display on the customer's service notification.

Add Preset: Preset messages can be created to increase the Technician's efficiency in the field. See below for how to set up Preset Notes.

Office Notes (Internal Use): Notes intended for internal use only should be entered in this field.
Add Preset: To help the technician quickly and easily enter in commonly used notes, you can create and edit Preset Notes in the system by clicking on Admin > Preferences > Mobile > Preset Notes.

Flag Note: This toggle takes the Office Notes and creates an Alert for the office.
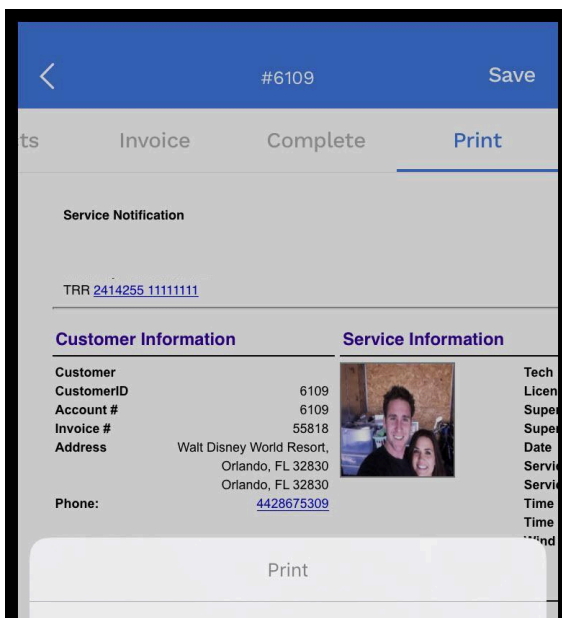
Print Tab

The Print tab displays the service notification with a green Print button located at the bottom of the screen. The options presented by tapping the Print button depend on the device.

Android

System Printer

Star Micronics: Recommended model WSP-i350

Note: To use a Brother printer, you will also need to install the Brother printer plug-in from the Google Play Store.

i OS

AirPrint

Brother: Recommended models PJ-773 and PJ - 763 Star Micronics: Recommended model WSP-i350

Fieldroutes Mobile: Products

Summary

The **Products** tab allow users to add and edit chemicals and other products used for services.

Adding products in FieldRoutes Mobile will allow technicians to document their chemical usage in the mobile apps, and allow office staff to pull reports related to products, such as the inventory, chemical tracking, and state chemical reports.

Accessing the Products in Preferences

To access the *Products* in *Preferences*, go to:
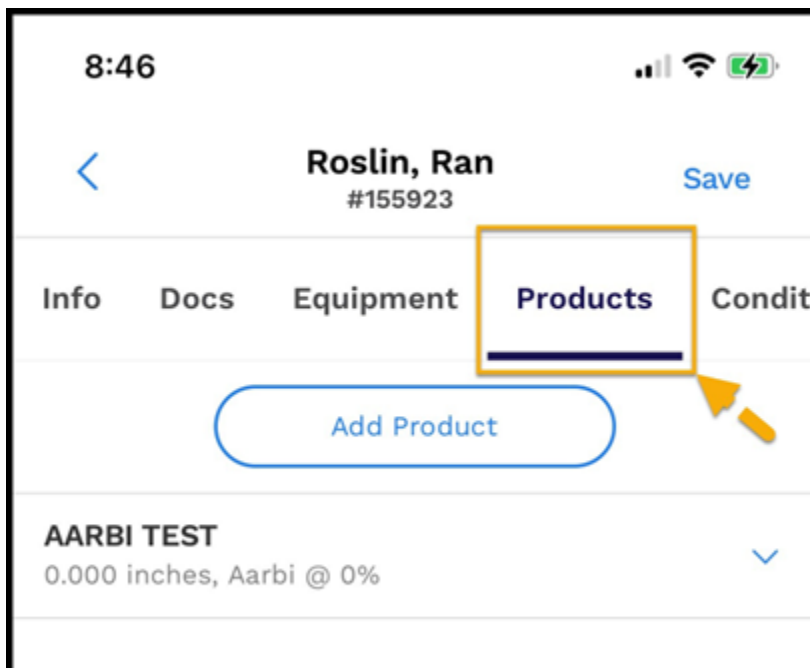
Adding or Editing a Product

To add a new *Product*, press *Add Product* or select a Product from the list and press *Edit Product* to change an existing *Product*.

Applied Amount: The *Brand Name* or common name of the product.

Dilution %: The name and percentage of the active ingredient in the product. This can be found on the product label.

Active Ingredient %: The Active ingredient percentage. **Mix Ratio Numerator:** The concentrated amount. **Mix Ratio Denominator:** The final diluted solution.

Method: The method of how the product is applied.

Target Areas: The user can select a default *Target Area*(s) for the product. All *Target Areas* set up for the product will appear on *FieldRoutes* when the product is selected by the technician. By selecting default *Target Areas*, the technician can quickly remove those that do not apply versus selecting ones when none are defaulted.

Target Issues: The user can select a default *Target Issue*(s) for the product. These can be pests, insects, and other issues that the product is used to prevent or cure. All *Target*

Issues set up for the product will appear on *FieldRoutes* when the product is selected by the technician. By selecting default *Target Issues*, the technician can quickly remove those that do not apply versus selecting ones when none are defaulted.

CA Pest Control Code: The default *California Pest Control Code* for the product. Note: The *CA Pest Control Code* will not be displayed for appointments outside of California.

Products with Multiple Active Ingredients

For Products with multiple active ingredients in the Product, use the Active Ingredients list section to list out each active ingredient.

Product Name: The *Brand Name* or common name of the product.

Active Ingredient Percentage: Here is where the *Active Percentage* can be added. This can either be the percentage of active ingredient or the dilution of active ingredient.

Choose *Remove* to remove any unwanted active ingredients, and select *Save* when finished.

Correct Default Dilution?

IMPORTANT! The dilution of the whole product must be correct, so state usage reports display accurate usage. The *Dilution Rate*

*Calculator* can assist in finding the correct dilution percentage.

Products not mixed with water will need to have a dilution of 100%

The math of how the different dilutions work is:

(Amount applied) X (Default Dilution) = (Concentrated amount used)

Can different measurement types be used for the concentrated, diluted, and inventory unit in the Products preferences?

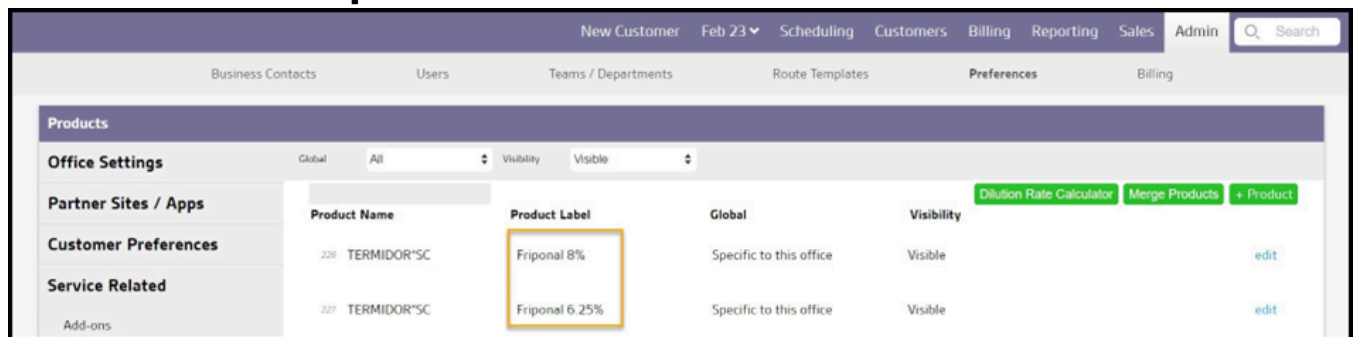Our software does not allow mixed unit types in the *Product* page.
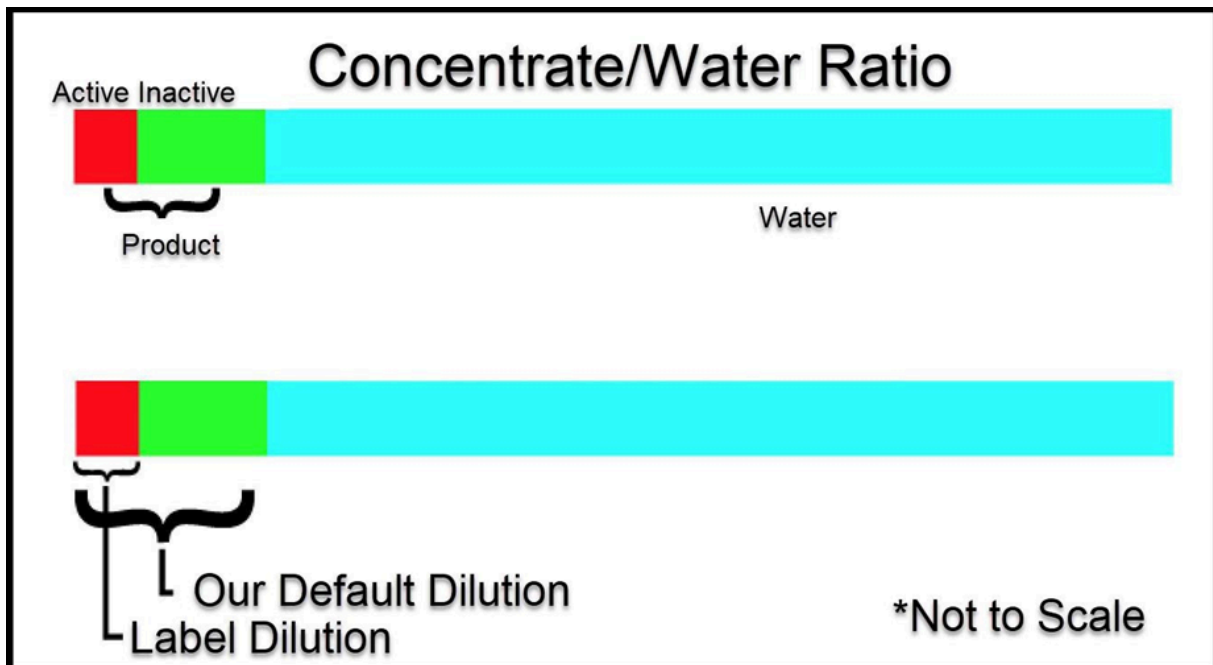
What do I do if a product has multiple dilution rates?

If the user has one product with multiple dilution rates, we recommend adding a new entry for each dilution rate.

For example, *Termidor SC* has a dilution rate of 0.08% and 0.0625%: the user would have the product input twice in the product preferences, and one entry would have a dilution rate of 0.08%, and the other would have a dilution rate of 0.0625%.

See the image below for reference.

How do I delete products?

Products cannot be deleted, only hidden. However, when a product is attached to past information, such as past appointments, deleting it will cause that information to disappear.

INVENTORY LIST

Headlamp	Robco SRG Spray Gun
Booties (pair)	Protek 2 Tool Interrupter
Respirator (Medium-blue)	Rod Slab Pipe 40" x 7/16"
Respirator Filters (box)	Robco Rod Pipes 40" x 5/8"
Goggles	Slab Injector Pedal Assembly
Gloves	Tip Soil 360DG 2 GPM LD
Drill (Corded)	Tip SSI 360DG 2 GPM LD
Hammer Drill (Cordless)	1/2" plugs
Battery Dril Charger	Straight Tips
Stud Finder	Vacuum
Magic Eraser	9' X 12' blue tarp
Tool Belt	5' x 7' cloth tarp
Hand Tools	Roto Hammer
Putty Knife	Paper Towels
1/8" Drill Bits (wood)	Soap & Water
Hand held trowel	GPS
dust pan	Rain Gear
Spackle	First aid kit
1/2 Drill Bits (concrete) 18 inches long	50' Extension Cord (12 guage)
1/8 Bits (wood & stucco)	6' Ladder
4" wood tip Brass Bits	24' Ladder
1/2" Wood Injector Tip	Poison Stickers
Acuspray	Quikrete
B&G 2 Gallon w/ 18" wand	lock cables
Robco QCG Gun	Safety Cone

2 - 25' Garden Hose
Shut off valve for hose
Spill Kit Absorbent
Spill Kit Bucket w/ lid
3 black garbage bags
4 lock set
Locks for ladders
Sprayer lock

Termidor HE
Termidor SC
Maserline/Bifen Liquid and Granules
Advion Ant and Roach gel
Outlast Pro Foam Agent
Bora-Care
Wasp-Freeze

Acknowledgment

I have received the policy manual for my position

X_____   _____/_____/_____

Commission rates for all services priced in accordance with the above guidelines will be paid at your standard rate. If the bid falls below the standard rates or there is no contract/PO when job is turned into office without authorization your commission rate can be reduced.

X_____ ./ ./

Gas Card Sign Off

X_____./ ./