



## Beverage Systems, Inc.

1404 Old Salisbury Rd  
Statesville, NC 28625  
(609) 882-2100

# 12/28/17 - Policy – Paperwork

Effective 01/01/2018

Paperwork must be filled out properly and based on the program parameters. It is the employee's responsibility to know and follow the rules based on the program. Ask your supervisor for clarification if needed.

### **Sending Farmer Brothers Paperwork Weekly**

All Farmer Brothers paperwork must be sent into the office on a weekly basis for processing. FedEx labels are provided by the parts department upon requests. It is the technician's responsibility to make sure they always have FedEx labels on hand. They should be ordered from the parts department before the last one is used.

Farmer Brothers will take a \$20.00 per invoice deduction when invoices are sent in 30 days after the service date. There will be a penalty set in place on the technician when an invoice is sent in late for failure of the invoices being sent into the office in a timely manner.

### **Penalty:**

- The employee will lose (2) hours of PTO for every invoice that incurs a \$20.00 deduction for the invoice being received late if it is found that the reason was the fault of the tech.
- If the employee does not have any PTO left to take for the calendar year, the hours will be deducted from the next calendar year. If the tech employee is terminated or resigns, the negative balance will be deducted from the final paycheck.
- If the technician is found to have a chronic issue with submitting paperwork on a weekly basis, such actions will be documented as a write up and the technician may be terminated if it is found that the technician has not taken appropriate actions to change the behavior.

### **Service, install, removal and exchange paperwork**

Various programs require that paperwork be written up and submitted with the invoice for proper processing. It is the technician's responsibility to know the program requirements and to properly take all possible steps necessary to have the paperwork filled out and signed by the customer and for the paperwork to be sent into the office weekly for proper processing. If the tech is not sure if a particular call requires specific paperwork, the tech must get an answer from their manager, office or from Jim Ossa to see if one is needed.

Paperwork does not need to be sent into the office once a picture of it is attached to the call in Service Fusion.

When Paperwork is required and filled out, the technician **MUST** take a picture of such paperwork and serial number plate(s) of each unit and attach it to the work order in Service Fusion so the office knows that paperwork was filled out.



There will be a penalty set in place for failure to fill out the required paperwork if it is found that the tech did not take the appropriate steps to find out and get such paperwork.

**Penalty:**

- The employee will lose (1) hours of PTO for every service call that requires paperwork filled out and the tech fails to fill it out.
- If the employee does not have any PTO left to take for the calendar year, the hours will be deducted from the next calendar year. If the tech employee is terminated or resigns, the negative balance will be deducted from the final paycheck.

**Programs that require paperwork as of 01/01/18**

**S&D Coffee and Tea** – All installs, removals and swap-out require specific paperwork to be filled out. If none is received, tech must request a copy before or during the install. A picture of the paperwork is to be attached to Service Fusion when paperwork is filled out.

**Royal Cup, Inc** – All installs require paperwork to be filled out. The asset # and barcode must be recorded if available. If none is received, tech must request a blank copy before or during the install. A picture of the paperwork is to be attached to Service Fusion when paperwork is filled out.

**Farmer Brothers** – Every single service call requires a Farmer Brothers invoice filled out.

**Dispenser Beverages (DBI)** – All installs, removals and swap-out require specific paperwork to be filled out. If none is received, tech must request a blank copy before or during the install. A picture of the paperwork is to be attached to Service Fusion when paperwork is filled out.

**Curtis Care** – All installs, exchanges and PM's require specific paperwork to be filled out. If none is received, tech must request a copy before or during the install. A picture of the paperwork is to be attached to Service Fusion when paperwork is filled out.

**Massimo Zanetti Beverage** – All installs and swap-outs require specific paperwork to be filled out. If none is received, tech must request a blank copy before or during the install. A picture of the paperwork is to be attached to Service Fusion when paperwork is filled out.

**Kerry (Island Oasis)** – Every single service call requires a Kerry Universal Work Order filled out. A picture of the paperwork is to be attached to Service Fusion when paperwork is filled out.