

# Trip Charge Policies

This document includes information about Trip Charge Reasons and the CRST Home Solutions policies surrounding Trip Charges and Appearance Fees.

## I. Trip Charge Reasons

We need to make sure that we use the correct Trip Charge Reason when we add a Trip Charge to an order for any client. CRST Home Solutions and our clients use data about trip charges to make business decisions, so accurate reasons are important. The table below outlines information about correct use of each reason; please pay special attention to the “Additional Work” definition:

Trip Charge Reason	Definition/When to Use
Additional Work	<p>The servicer must perform additional work outside of the Scope of Work in order to complete the job, <b>AND</b> CRST Home Solutions does not have a SKU for the required work/service.</p> <p><b><u>We should not add any “Additional Work” Trip Charges to Best Buy (HT), Best Buy Appliances jobs. Always use the client-specific Make it Right and/or upsell processes to add work to jobs for these clients.</u></b></p>
Job Does Not Pay Enough	<p>Servicer agrees to do the job for additional pay; request for additional pay is NOT related travel/distance.</p> <p>Agents can use the “Job Does Not Pay Enough” reason in negotiations after a servicer has said they cannot or will not do a job.</p>
Last Minute	<p>Servicer agrees to do the job last minute (today or tomorrow) for additional pay. Agents can use the “Last Minute” reason in negotiations after a servicer has said they cannot or will not pick up a last minute job.</p>
Mileage	<p>Servicer agrees to do the job outside of their normal coverage area for additional pay.</p> <ul style="list-style-type: none"><li>• The normal coverage area is within 35 miles of the store.</li><li>• Lowe’s coverage area is 20 miles from the store. Use the Lowe’s Mileage process in WF.</li><li>• Servicers cannot receive “Mileage” trip charges for jobs within their coverage area. If the servicer says they will do the job for more money, enter the request under “Job Does Not Pay Enough,” not under “Mileage.”</li></ul>
Client Billable	<p>This occurs when the client agreed to cover the service cost for the customer, <b>and we don’t have a SKU for that service in the Master Client SKU List</b>. For some clients, like Best Buy &amp; Lowe’s, may allow us to use this type of charge to address onsite upsells for which we don’t have a SKU.</p> <p>Example: Providing and installing gas line adapter</p>

## II. Negotiating Requested Trip Charges

When a servicer requests a Trip Charge for a job, we need to negotiate the fee amount. **Do not tell servicer that we are negotiating Trip Charges; simply notify the servicer that the supervisor is more likely to approve the amount you offer in step 2 below.**

1. Pull up the calculator on your computer and enter requested fee and multiply it by 0.80.  
**Example:** If the requested fee is \$75, enter **75 x 0.80** on the calculator. The result is **\$60**.
2. Propose this calculated amount to servicer, saying: “My supervisor is more likely to approve ‘*calculated amount*’ than ‘*originally requested amount*’. I can submit ‘*calculated amount*’ to my supervisor for approval.”

# Trip Charge Policies

**Example:** “My supervisor is more likely to approve \$60 than \$75. I can submit \$60 to my supervisor for approval.”

- If the servicer agrees to the calculated amount (\$60 in the example above), enter it in the Trip Charge tool on the job in DOLI following the normal procedure.
- If the servicer insists on the originally requested amount or counters with a different amount, enter that amount in the Trip Charge tool on the job in DOLI following the normal procedure.

**Note:** Be sure to select the correct **Trip Charge Reason:**

- **Additional Work:** The servicer must perform additional work outside of the Scope of Work in order to complete the job, **AND** CRST Home Solutions does not have a SKU for the required work/service.
  - **Job Does Not Pay Enough:** Servicer agrees to do the job for additional pay; request for additional pay is **NOT** related travel/distance.
  - **Last Minute:** Servicer agrees to do the job last minute (today or tomorrow) for additional pay.
  - **Mileage:** Servicer agrees to do the job outside of their normal coverage area for additional pay.
- Notify the servicer that if the supervisor approves the trip charge, the order will be assigned to them in DOLI.
  - Update job status to **Prescheduled – Rejected** (*only when job is not scheduled today/tomorrow*)
  - Notate the job in DOLI.

## III. Entering A Trip Charge in DOLI

- Click on the **Trip Charge Info** tab.

ORDER HISTORY	555- 111- 2222	TEST	TEST
COMMUNICATION	Address	Other	Alt. Phone
EQUIPMENT	241 MAIN ST.	--	--
BOOK ORDER	CONCORD, NC	Email	
GET DATES	28027 <a href="#">Map</a>		
QUESTIONNAIRE	DOLI Job No.	Installer Information <a href="#">▼</a> Edit   <a href="#">Login</a>	A 42670 < Serial No.
FORM UPLOAD	3090-943	UNIQUE HOME THEATER & SATELLITE	VIENGHONE "VK" SAYCHAY
SHIPPING INFO		<a href="mailto:UNIQUEHTS@GMAIL.COM">UNIQUEHTS@GMAIL.COM</a>	704- 787- 3239
JOB RATES			
TRIP CHARGE INFO		< Tech	704- 787- 0376 < Alt

**Note:** This displays the *Enter New Trip Charge* form in the bottom panel of DOLI.

- Fill in the Enter New Trip Charge form:
  - **A#:** The serial number of the servicer requesting the fee.
  - Check the box if this is a pending servicer.
  - **Amount Requested:** Amount the servicer is asking for.
  - **Amount Billable:** 0
  - **Trip Charge Reason:** Select the correct reason from the drop down. Note: For equipment issues caused by the Client, choose Appearance Fee-Equipment Issue.
    - **Additional Work**
    - **Appearance Fee.** A Reason Code is required for this Trip Charge Reason.
    - **Appearance Fee – Equipment Issue.** A Reason Code is required for this Trip Charge Reason.
    - **Job Does Not Pay Enough**
    - **Last Minute**
    - **Mileage**

# Trip Charge Policies

- **Reason Code:** Choose the correct Reason Code for the Appearance Fee if this drop down is an option.
- **Reason Description:** This only applies to client billable trip charges. Enter specific details why the additional money was needed.
- **Status:**
  - **Pending Approval:** All trip charge requests must be placed in **Pending Approval** status. The reason for this is that the Supervisor has still not formally signed off.
- **Approved By:** The name of supervisor/manager who verbally approved the fee.
  - If this is an Appearance Fee or Appearance Fee-Equipment Issues: place **“RC”** in this field. The others should be approved by **“FSR”**

3. Click “Submit Trip Charge.”

The screenshot shows the 'Enter New Trip Charge' form with the following fields: A#, Is this a pending installer? (checkbox), Amount Requested, Amount Billable, Reason (dropdown menu showing 'Please choose a reason'), Status (dropdown menu showing 'Please choose a status'), and Approved By. A 'Submit Trip Charge' button is at the bottom.

This screenshot shows the 'Enter New Trip Charge' form with the Reason dropdown menu set to 'Appearance Fee'. The Reason Code dropdown menu is open, showing options: 'Please choose a reason code', 'Service Cancelled at door', 'Site Not Ready/No Fit', 'Service Cancelled at door, delivery only', and 'Customer Not Home for Appointment'.

## IV. Same Day/Next Day Approvals

Where there is a same day or next day trip charge request, that request should immediately be taken to management for approval. For requests 3+ days in the future, we will enter the request into DOLI for field management to approve.

Below are the amounts that each group can approve

- Supervisors: Up to \$149 for all same day and next day requests.
- Market Managers/Field Managers: Up to \$149
- Kirk Ryzdzyński & Rob Bishop: All requests for \$150 and more.

The screenshot shows the 'Enter New Trip Charge' form with the Reason dropdown menu set to 'Job Does Not Pay Enough' and the Status dropdown menu set to 'Pending Approval'. The Reason Description field is empty. The 'To be Approved By' field is labeled 'Name of Group/Pod Lead'. A 'Submit Trip Charge' button is at the bottom.

Both Resolution Care agents and management must always submit trip charges with a status of **“Pending Approval”**. Market Managers and Field Managers are responsible for the final approval of all trip charges equal to or less than \$150.

# Trip Charge Policies

In cases for same day and next day requests where a Group or Pod Lead provides verbal approval of a trip charge, agents must notate the name of Lead who approved the amount.

## V. Client Billable

The client billable trip charge is submitted slightly differently due to the unique circumstances. Complete and accurate information is very important Accounting when we submit these trip charges because they need to be able to explain to the client why we are billing them for the work. For this reason, there will be additional dropdown fields that need to be completed when entering a client billable trip charge. We will cover this in more detail in other modules.

**You are required to notate the name and department/store # of the client associate and who approved the client billable amount.**

## VI. Additional Work

The **Additional Work** process that allows us to sell or reach out to the client to add SKUS for additional work needed to complete the customer's job is in place with most clients, including **Best Buy, Best Buy Appliances, and Lowe's**. The SKUs and Trip Charges we add to jobs in DOLI or through Make it Right tell the client what extra work the customer needed.

It is important that we all use the **Additional Work** trip charge type correctly for Best Buy and Best Buy Appliances orders. In some cases, we are incorrectly adding Trip Charges, when we should be using a SKU. Please be sure to follow the Upsell, Make it Right, or other client specific processes outlined in the Workflow for each client when necessary.