



# ServiceChannel Trade Partner

## 2025 Guide for Success



## Welcome!

Congratulations on becoming a ServiceChannel trade partner. Only our top-tier providers are selected—and that means you!

*Let's get started →*

# Table of Contents

## Introduction

What is a ServiceChannel Trade Partner 3

## How to Succeed

Onboarding: Get off to a Great Start 4

Provide Great Service 5

## Managing Work Orders

Updating Work Order Status 6

The Perfect Work Order 7

Return Visits 8

Work Order Status Definitions 9

ServiceChannel Provider Mobile App 10

Proposals 11

Invoices/Getting Paid 13

## Preventative Maintenance Programs

General Guidelines 14

How It Works 15

Service Level Agreement 16

Resources 17

Frequently Asked Questions 18

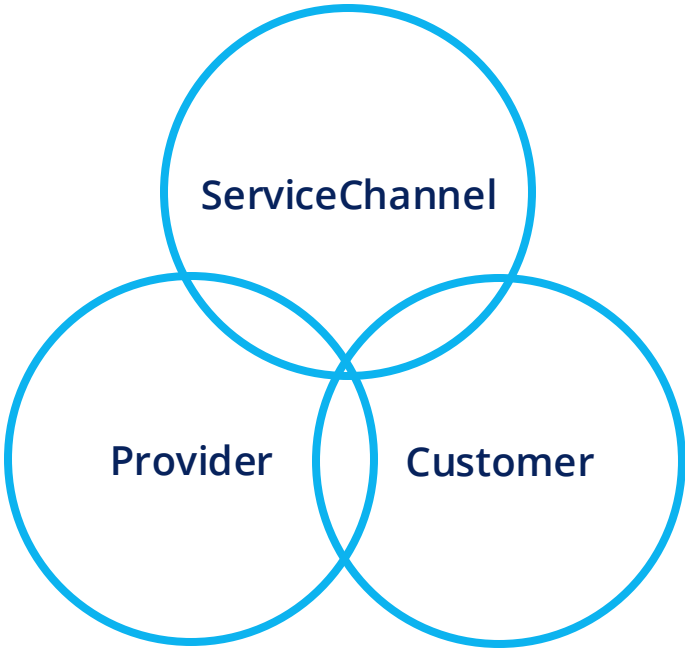
Support: Contact Us/Helpful links/Feedback. 19

# What is a ServiceChannel Trade Partner?

Many of today's top brands rely on ServiceChannel to help them find and work with the best providers.

Top performing providers like you are tapped to work for these high-profile customers.

ServiceChannel may also be involved with the day-to-day management of work orders on behalf of these customers.



*Businesses just like yours have grown exponentially as ServiceChannel trade partners, winning new commercial customers with thousands of locations.*

# How to Succeed

## *Onboarding: Get Off to a Great Start*

Your first 30 days with a new customer sets the tone for your ongoing relationship. It's your opportunity to show the customer right out of the gate that we've assigned the right partner, that we care about their success

and yours:

- To be slotted and confirmed for a new customer and begin receiving work orders, all onboarding requirements must be complete.
- Promptly upload all required documentation to the Fixxbook invitation including COI, and any other customer requirements listed in the invitation.
- Follow all procedures, including accepting a work order, dispatching immediately, checking in and out, updating notes and scheduled dates, and submitting proposals and invoices promptly.

## Onboarding Schedule

Send store confirmation email: Allow 2 business days

- Return updated Store List

[Accept Fixxbook invitation](#): Allow 2 business days

- Login to SC portal and accept invite

[Upload certificate of insurance \(COI\)](#): Allow 3 business days

- Remember to fill in Required Limits
- Certificate holder must match COI example exactly

[Complete all custom requirements](#): Allow 2 business days

- If upload is required, Sign & Date where indicated
- Upload ALL pages of the document

# How to Succeed

## *Provide Great Service*

Your growth and success as a trade partner hinges on maintaining high scores in four key performance areas:

### Communication

Make timely and detailed updates to work order notes and schedule.

### Speed

Meet all SLAs and submit proposals and invoices quickly.

### Quality

Maintain a high first-time completion rate and get great customer feedback.

### Cost

Deliver cost effective service (based on cost per invoice, not hourly rate).

*Your Provider Development Manager will reach out as needed to review your metrics and help you stay on top.*



# Managing Work Orders

*Update to the correct work order status at every step*

Updating work order status promptly and correctly for each phase of the work, along with entering detailed comments in the notes fields, is the foundation of our day-to-day communication.

## Here's how it works:

### Receive the Work Order

You receive a work order with the scope of work, job location, the customer required service level agreement (SLA) and not-to-exceed (NTE) amount.

WO status = Open

### Acknowledge the Work Order

Accept or decline within 30 minutes (within 15 minutes for emergencies). If you accept, the work order status changes to "Open/In Progress."

WO status = Open / In Progress

If you need to decline, open the ticket, describe your specific reason for declining, and choose the correct decline reason.



# The Perfect Work Order

*Aim to complete every work order in the first visit*

## Dispatch to the Location

Your technician arrives within the SLA and checks in with the mobile app (IVR is only used as back-up).

If the job can be completed in the first visit but will exceed the NTE amount, call for approval before proceeding with the work.

## Complete the Work

When the job is complete, your technician uses the mobile app to check out, and enters the correct root cause and resolution codes.

WO status = Completed / Pending Confirmation

## Invoice

Typically, customers will have 5 days to confirm satisfactory completion and provide feedback. If no feedback is provided, we will close the ticket and you may submit your invoice.

WO status = Completed / Confirmed

*See page 13 for details on invoices.*

Submit your invoice within 10 days of the Completed / Confirmed status.

*Per industry standards, all providers are required to warranty their work for a minimum of 30 days.*

*If a problem affects the client's safety, security, or sales, make every effort to fix it quickly, even if it's temporary.*

*As a best practice, always check-in and check-out with a manager onsite.*

*For work order issues or need permissions while on site, call us at*

**(516) 726-1225**

# Return Visits

## *What to do when a job can't be completed in the first visit*

If a job can't be completed because parts are needed, and the cost of the parts is covered by the work order NTE amount, change the status:

WO status = In Progress / Parts on Order

If the cost of the parts will exceed the NTE amount, a proposal must be submitted and approved before parts are ordered. Check out, add a note, and change the status:

WO status = In Progress / Waiting for Quote

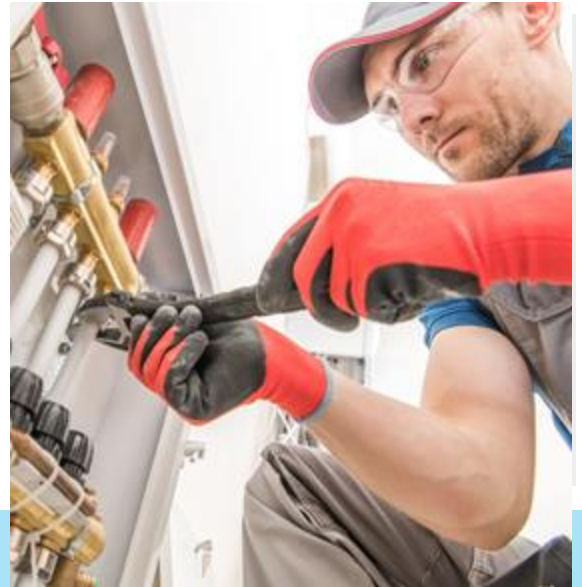
Proposals should be submitted within 48 hours, (24 hours if an emergency) and include expedited shipping. Always upload photos when submitting proposals.

*See page 11 for details on proposals.*

As soon as the proposal is approved, order the parts and update the work order with the estimated delivery date, tracking number, and your return schedule date to install the parts.

Change the status:

WO status = In Progress / Parts on Order



*A work order should never be left in "Incomplete" status. Use Incomplete only when you're checking out temporarily, for example, going to lunch.*

*You won't be able to check in if the proposal has not been approved. Customers retain the right to refuse invoices for unapproved work.*



# Work Order Status Definitions

*Correct work order status is the basis of communication*

**Open:** Work order generated; not yet accepted

**In Progress:** Work order accepted; provider actively working

- In Progress/Dispatch Confirmed: Open work order accepted.
- In Progress/On Site: Provider arrived at location.
- In Progress/Parts On Order: Parts are needed to complete the job.
- In Progress/Incomplete: Job needs further follow-up. (Note this status should be used only when checking out temporarily; e.g. for lunch, coming back the next day to complete the work).
- In Progress/Waiting for Quote: A price quote needs to be submitted for additional parts or labor.
- In Progress/Waiting for Approval: Proposal for additional resources submitted; not yet approved.
- In Progress/Waiting for Client Approval
- In Progress/Proposal Approved: Proposal approved by facilities manager.
- In Progress/Unsatisfactory: Job completed but location user or facility manager deemed the work not acceptable.

**Completed:** Provider completed the work; can generate an invoice

- Completed/Confirmed: Equivalent to Completed status; provider has completed the work order and can generate an invoice.
- Completed/Pending Confirmation: The provider has completed the work, but a location or facility manager must provide satisfactory feedback, typically within 5 days, on services before the work order is Completed/Confirmed. (This status appears only if configured by the customer).
- Completed/Cancelled: Work order withdrawn; no further services needed.
- Completed/No Charge: Work order completed; no service fees incurred.

# ServiceChannel Provider Mobile App

The provider mobile app makes it easy to communicate your progress and provide real-time status updates — which also helps speed up the billing cycle.

## Use the mobile app to:

- Check in/check out. You can check in or out only within a quarter mile of the site. The app notifies you when you're within range.
- Notify the location manager on arrival.
- Take before and after photos and attach them to the work order.
- Record Issues and Updates
- Notify the location manager that work is ready for inspection.
- Close the work order after approval.
- Schedule any necessary return dates.

Download the App

Apple App



Android App



*Your provider scorecard considers your check-in and check-out times so be sure to use the app every time.*

# Proposals

All proposals need to be approved by ServiceChannel and/or the customer prior to the start of work. Submitting a complete proposal the first time reduces turnaround time and helps you meet SLA's. In most cases, a ServiceChannel highly experienced HVAC, Refrigeration, Electrical, Plumbing or General trade specialist will review your proposal prior to the customer.

All of these line items must be included in all proposals:

- A complete description of the technicians' diagnostics from the initial location visit to the recommended repair solution.
- Before-and-after pictures of the repair added to the work order as an attachment.
- Costs incurred to date: Include a breakdown of parts, labor, materials for initial diagnosis of repair.
- Materials:
  - Show manufacturer, part number, and description.
  - For replacement equipment or anything involving a make, model, and serial number, include Model/Manufacturer, size/tonnage and RTU # (i.e. RTU1, RTU2).
  - If miscellaneous charges exceed \$25, include a line item breakdown.
  - For repair materials such as flooring and ceiling tiles, include the cost per square foot in the description field
- Labor charge: Number of hours x client-approved rate per hour x number of technicians.
- Travel charges
- Freight charges (If contracted)
- Expedited overnight shipping option: Add a note in the proposal if this is not available.
- Total tax: Include sales tax whenever you are invoicing the end customer who will pay you directly. Do not include sales tax when you are invoicing ServiceChannel and ServiceChannel will pay you.

## ▪ Total Projected Cost

# Proposals

Note: Management fees may not be listed as a line item in proposals or invoices. Proposals that include these fees will be automatically rejected.

## Work order status:

Proposals submitted to ServiceChannel: Once your proposal is reviewed and accepted by the trade specialist, the work order and proposal status changes to "Pending External Approval". This means the proposal is awaiting a final decision from the client.

Proposals submitted directly to the end customer: The work order status will change to "In Progress – Waiting for Approval." Once the trade specialist reviews it and makes a recommendation to the client, the work order status changes to "In Progress – Waiting for Client Approval"

We ask that you honor your quoted pricing for 30 days. For most customers, if a quote is not accepted or rejected within 30 days, you may close the ticket and bill for incurred costs. If a customer asks to have a job re-quoted after 30 days, treat it as a new quote.

# Invoices/Getting Paid

Follow these guidelines to ensure that your invoices are paid promptly:

- Submit all your invoices on the ServiceChannel platform.
- Submit one invoice per work order.
- Make sure your work order is closed so that your invoice can be processed.
- Submit your invoice within 10 days from when the work order is Completed/ Confirmed.
- If a completed work order is not invoiced within 90 days, the status will change to ineligible for billing, and you will not be able to invoice.
- To be approved, your invoice needs to be within the agreed NTE amount and include a breakout of labor, number of techs, materials, trip charge, and freight.
- Include sales tax *only* if you're billing the customer. If you're billing ServiceChannel, invoices that include sales tax will be rejected.
- Attach electronic versions of any subcontractor invoices.
- The customer reserves the right to refuse invoices for work that was not approved in advance.



# Preventative Maintenance Programs

## *General guidelines*

ServiceChannel awards preventive maintenance (PM) work through a Request for Proposal (RFP) process.

- The RFP process is separate from your onboarding with the customer, so you may be contacted by a different ServiceChannel team member than the one working with you for onboarding.
- Providers awarded a PM program are automatically slotted as the primary provider for reactive services related to that PM trade at those locations, including emergency work orders. Before accepting the RFP and submitting a bid, be sure your company can deliver this level of service. Declining an RFP will *not* impact future PM opportunities.
- While cost is an important factor, the lowest bidding provider is not always selected for each location. Factors such as coverage, capacity, ramp up time, KPI data and past working experience are all factors we consider.



# Preventative Maintenance

## *How it works*

### **Request for pricing**

You may be contacted directly from a member of our Strategic Sourcing team, or you may receive an automated email through our RFP software from the email address: [noreplyservicechannel@ecsourcinggroup.com](mailto:noreplyservicechannel@ecsourcinggroup.com)

We ask that you accept or decline within 48 hours.

### **Submit your bid**

If you received a formal request through our RFP software, all communication, including your bid, is handled through the software. If a member of our team contacted you directly, correspondence is by email.

### **Negotiations**

A brief period of negotiations and/or additional price gathering may follow your submission, so it may be a few weeks before you receive a response.

### **Customer review**

After all pricing is finalized, we send a proposal to the customer.

### **Notification**

If your proposal is accepted, you will be sent a bid award including a start date, the locations awarded, scope of work, and your winning bid figures.

*Onboarding with the customer must be complete before you can receive work orders.*

If you're not selected, you'll have the opportunity to meet with one of our team members to discuss the reasons and receive guidance to be better positioned for the next opportunity.

*For inquiries about PM process and opportunities, email our strategic sourcing team:*

[strategicsourcing@ServiceChannel.com](mailto:strategicsourcing@ServiceChannel.com)

# Preventative Maintenance

## *Service Level Agreement (SLA)*

- All awarded PMs are expected to be completed during the stated month of service. To stay on target, 50% of your PMs for any program should be completed by the 15th of each service month. If for some reason, a PM will *not* be completed by the end of the service month, notify us as soon as possible.
- All PM work orders must be accepted on or before the 1st live date of the PM work order. For many PM frequencies, this will be on or before the 1st of the month in which the PM is to be completed.
- Schedule your PM work orders directly with the locations and enter the schedule date into the work order. If that ETA can't be met for any reason, notify the location to reschedule and update the work order with the new date.
- Make sure your technicians check in and check out via the mobile app (use IVR only if necessary).
- Once the job is completed, change the work order to the correct completion status.
- If you find the need for work not covered by the PM work order, you'll need to submit a new proposal by selecting the Proposal tab in the top menu bar.

*See page 11 for details on proposals.*

---

*Complete work within the stated month of service.*

---

*Aim for 50% completion by the 15th of the month.*

---

*Schedule your PM work orders directly with the location.*

---

*Check in and check out every time with the ServiceChannel Provider mobile app.*



# Resources



# Frequently Asked Questions

- **Are work orders for only one service issue?**  
Yes, there is only one service per work order. Each work order is completed and billed separately.
- **What if the location manager asks me to do additional work not included in the work order?**  
Ask the location manager to open a new work order.
- **Why do I need to use the ServiceChannel Provider mobile app on location to accept the work order, check in, check out, and close out the work order?**  
Verified check in and check out times are a key factor in determining several of the KPIs that contribute to your performance scores.  
The mobile app helps keep your technicians accountable. It's also the easiest and best way to communicate the status of your work orders.
- **Why do I not add sales tax to my invoices to ServiceChannel?**  
ServiceChannel is reselling to the end customer and we collect and pay sales taxes. Our purchases from your company are tax free under a resale exemption. Requests for Certificates of Resale can be sent to [SCMProviderDevelopment@ServiceChannel.com](mailto:SCMProviderDevelopment@ServiceChannel.com).  
Include your company name, business address, tax ID and the state form you are requesting

# Support

## Contact us

ServiceChannel Managed Support  
Routine updates, quote approvals,  
and questions about your ServiceChannel  
Managed work

orders: [scmsupport@ServiceChannel.zendesk.com](mailto:scmsupport@ServiceChannel.zendesk.com)

For immediate response call: **(516) 726-1225**

Preventative Maintenance  
Questions about PM RFPs and opportunities:  
[strategicsourcing@ServiceChannel.com](mailto:strategicsourcing@ServiceChannel.com)

## General Support

If you require platform training, have platform  
issues or inquiries related to your non-  
SC managed customers:

[ContractorSupport@ServiceChannel.com](mailto:ContractorSupport@ServiceChannel.com)

## Contractors and Suppliers

24/7 Call Center

North America: (800) 803-5822

IVR Hotline, 24/7: (516) 500-7776

More [telephone numbers](#)

## Feedback

Your collaboration is important. Send us  
feedback via email:

[SCMProviderDevelopment@ServiceChannel.com](mailto:SCMProviderDevelopment@ServiceChannel.com)

## Helpful links: ServiceChannel.com

[Provider Central](#)

[Provider Solutions](#)

[New Contractor Scorecard 2.0](#)

ServiceChannel Managed | Trade Partner Program



## Helpful links: SC University

[ServiceChannel University](#)

[Check In/Out with SC Provider mobile](#)

[Login to Provider Automation](#)

[Look up Invoice Payment and Status](#)

[Manage Client Requirements](#)

[Managing Client Rates](#)

[Provider Tutorials – Watch & Learn](#)

[ServiceChannel Usage Fees](#)

[Update an Admin to SC Provider mobile](#)

[Updating Expired Insurance Documents](#)

[Using the Provider Mobile App](#)

