STAPLES easytech

Service Form

Store Information

Intake date: _____

Due date: _____

Intake associate: _____

business card here.

Customer Information

Address: _____

City: _____ State: ___ Zip: ___

Phone: _____

Email: _____

Work order #: _____

Company name: _____

Customer name: _____

Rewards number: _____

1 Initial Consultation And Documentation

Ask customer to describe the issues they are experiencing:
(Associate: take notes below)

_____

_____

_____

_____

_____

Inform the customer of the steps you will perform during the intake process:

1. ☐ Booted OK ☐ Did NOT boot _____ Customer initials
2. Discuss PC issues
3. Make recommendations
4. Schedule service with a certified technician

Attempt to replicate the issues that the customer described:
(Associate: take notes below. Capture specifics, such as error code numbers)

_____

_____

_____

_____

2 Estimate Time To Run Intake Analysis

First record the specs of the PC:

RAM: _____ RAM Capacity: _____

Processor: _____

Age of PC: _____

Operating System: _____

Based on these specs, estimate the amount of time it will take to run the analysis and inform the customer: _____

3 Start Intake Analysis

While Intake Analysis is running, collect additional information necessary to perform a successful service. During the conversation, be sure to capture the following info:

Do they use their computer for home or business use?

_____

Describe their network. How many devices are connected?

_____

Who has access to their computer?

_____

Are they happy with the speed of their computer?

_____

Which antivirus or security software is installed and when does it expire?

_____

How do they back up their files?

_____

Do they access the Internet away from their home or office?

_____

Are there any additional problems that weren't discussed?

_____

4 Review Intake Analysis

☐ Discuss the results from the Intake Analysis.

5 Recommended And Approved Services

Check off the services recommended to and approved by the customer:

Setup and installation:
- ☐ ☐ Hard drive installation
- ☐ ☐ Network installation
- ☐ ☐ Mobile Internet access
- ☐ ☐ Software installation _____
- ☐ ☐ Windows® customization
- ☐ ☐ Data transfer
- ☐ ☐ Other _____

Repairs:
- ☐ ☐ PC Tune Up +
- ☐ ☐ PC diagnostic
- ☐ ☐ Virus removal
- ☐ ☐ System restore
- Disk required _____
- ☐ ☐ Advanced repair (send it out to a centralized repair facility)
- ☐ ☐ Other _____

Protection:
- ☐ ☐ AV installation
- ☐ ☐ Data backup
- ☐ ☐ Operating system backup
- ☐ ☐ Other _____

Upgrades:
- ☐ ☐ Memory installation
- ☐ ☐ Card installation
- ☐ ☐ Other _____

Other:
- ☐ ☐ _____
- ☐ ☐ _____

☐ Recommended
☐ Approved Services

6 Record Customer-Owned Items Left Behind

List any additional items being left with the customer's PC:

- ☐ Power cord
- ☐ Laptop case
- ☐ CD/Software _____
- ☐ Other _____

Customer login and password: _____

_____

7 Management Quality Check

This service form has been reviewed for quality and completeness.

Management Signature: _____

Date/Time: _____

Use other side for additional notes.

Internal service tracker

CUSTOMER NAME: _____ ORDER #: _____

BIN LOCATION: _____ PHONE #: _____

In-Store Actions

Date	Initials	Action/Results	Is Service Complete? ✓

Customer Contact Points

Date/Time	Initials	Reason for Contact/Outcome of Contact	

Parts quote

Provide customer quotes on related items:

AC adapter

Item # _____ Y☐ N☐

Price $ _____

Battery

Item # _____ Y☐ N☐

Price $ _____

Memory

Item # _____ Y☐ N☐

Price $ _____

Service completion

The technician should perform these steps and initial before notifying the customer that the service is complete.

- ☐ Check quality of service. Boot PC. Confirm that all service steps were completed.
- ☐ Update notes in online work order system.
- ☐ Place all of the customer's items in a bin and match the PC serial # to the invoice and all asset tags.
- ☐ Verify customer notes in box 1. Ensure that all issues have been addressed.

Technician initials: _____

Pickup

Associate should perform these steps with the customer:

- ☐ Check ID
- ☐ Boot PC
- ☐ Demonstrate problem resolution utilizing customer notes from box 1
- ☐ Review services performed
- ☐ Request additional payment due
- ☐ Remove asset tags

Pickup associate signature: _____

Customer signature/date: _____