

S.O.P.: Shutter Check Measure (CM)/Install - Basic

Facility / Department: Quality Installations with clean waivers

People required: 1

Cycle time 1 order: approx. 1 hour per shutter (small to medium window) includes caulking.

S.O.P. number: 100

Created: May 2016

Names of Competent Trained Operators: #1 Ric Ptak

Step 1

Call customer and set up CM appointment. Plan to be 10 minutes early for your appointment. Always wear your ID badge when interacting with client. Using decorator information determine frame and shutter type. Bring samples to the check measure.



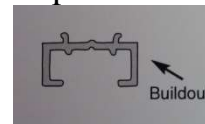
Step 2 (Inside Mount only)

Take 3 width and 3 height readings with tape measure inside the frame at lower, middle and top then far left, middle and far right. Determine smallest dimension of width and record rounding down to nearest 1/8". Determine smallest dimension of height and record rounding down to nearest 1/8".



Step 3 (Outside Mount only)

Take 3 width and 3 height readings with tape measure outside casing at lower, middle and top then far left, middle and far right. Determine smallest dimension of width and record rounding up to nearest 1/8". Determine smallest dimension of height and record rounding up to nearest 1/8". Add 2 times shutter frame thickness and 2 times clearance. Suggested clearance is 3/8". Also confirm if build outs are required.



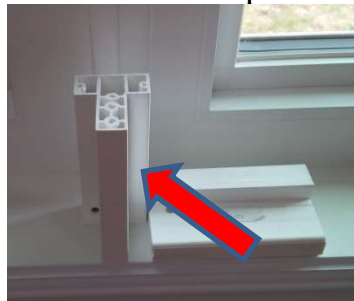
Step 4

Confirm room #, amount of panels and hinging locations. Also confirm louvre depth size and make sure that louvres will operate by checking depth of frame and any interference. Confirm divider rail locations and tilt bar locations. If tilt bars are on rear confirm there will be no interference when installed.



Step 5

Record tee post locations beginning from far left. Measurements given will be centre of tee posts. Be sure that any casement locks will still be accessible and operate at the tee post location you are giving. If required some cut-outs may be required here depending on amount of available space. It is preferable that the installer make these cut-outs on site at time of installation. Factory can also make cut-outs however exact sizes and locations are required.



Step 6

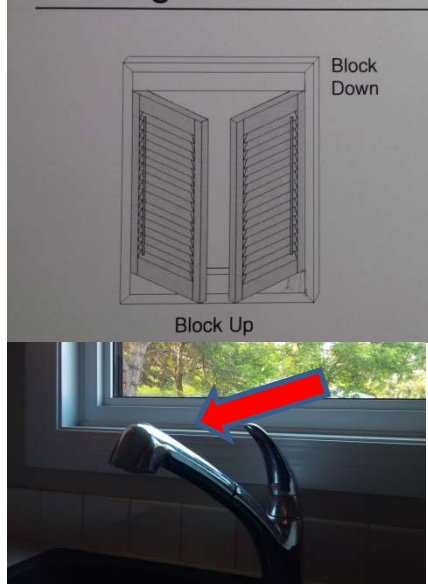
Check for casement crank locations and whether the frame will interfere. Place sample frame in location beside crank and determine if cut-outs are required.



Step 7

Check that sizes of panels and tee post positions will allow screen removal after shutters are installed. Also check for outer obstructions such as gooseneck taps at kitchen windows or bulkheads.

Clearing Obstructions



Step 8 (Install - Inside mount)

Call customer and make install appointment. Plan to be 10 minutes early and allow plenty of time for install based on travel time and one hour per shutter. Make sure you have all tools, supplies and garbage bags. You may need shims and caulking as well as jigsaw. Also bring blank waiver for customer to sign at install completion.

Step 9

Locate hardware parts and unwrap first shutter and begin install by placing in window. Use wedge shaped shims to hold frame and panel in proper location. Make sure panel is plumb and level and panel opens properly. Panels need to be aligned at top and bottom. Check that panels are not twisted by opening panel slightly and aligning top and bottom gap. Attach frame in place using screws supplied.



Step 10

Larger windows may require frame assembly. Use supplied corner brackets to assemble.



Step 11

Tee posts will need to be installed using L brackets. Be sure to confirm locations with shutter panels before fixing with supplied screws.



Step 12

Where cut-outs are required scribe the frame to the crank and cut using jigsaw.



Step 13

When frame is secured and panels are installed, adjust the friction catches. Magnetic catches may need to be installed. Install button plugs in frame to cover frame installation screws. When all panels are aligned and operate properly caulk the frame where required.



Step 14

Move to next window and repeat steps 9 to 13 until job is complete.

Step 15 (Install-outside mount)

Unwrap first shutter and begin install by placing in window. Make sure panel is plumb and level and panel opens properly. Attach frame in place using screws supplied.

Step 16

Move to next window and repeat steps 10, 11 and 13 until job is complete.

Step 17

Clean and remove all packaging by placing in garbage bags. Take bags and cardboard and dispose of properly.

Step 18

Explain shutter operation and proper care and maintenance to customer. Leave customer with the warranty and care information.



Step 19

Have customer sign waiver.
If there are deficiencies note any rework items on waiver.
Remember the voice of the customer and communication is the key to respect.

INSTALLATION SERVICES

INSTALLATION COMPLETION CERTIFICATE

Customer Name: DENNIS LAM PO # 553289

As the installer of your home window fashions, I take great pride in my workmanship and have done my very best to ensure that you will enjoy many years of trouble free operation. This certificate is your guarantee that the work has been completed in accordance with the contract terms.

Finally, I would like to thank you for the privilege of installing your window fashions, and I assure you that even though the job is complete, we look forward to serving you in the future.

Sincerely,

Installer: [Signature] Ric Ptak

Items Requiring Action (List check measures line, reason, estimation completion date)

I acknowledge that the installer has completed the items as listed above unless declined at my request and subsequently installed. Furthermore, I acknowledge that the additional actions identified above are required to complete the installation.

Customer Signature: [Signature] Date: 18 MAY 2016

Effective February 1, 2009 Please fax to: 877.471.8277

Step 20

Send in completed waiver to 3dif office. Complete installer proforma (cm, install charges) and forward to office.

INSTALLATION SERVICES

INSTALLER PRO-FORMA

Installer Name: [Signature] Ric Ptak

Installer Ref #: [Signature] 553289

Customer Name: [Signature] DENNIS LAM

DESCRIPTION: [Signature] 1 100 100 100 100

CHECK MEASURE: [Signature] 1 100 100 100 100

INSTALLATION CHARGES: [Signature] 28 JUNE 2016 1 100 100 100 100

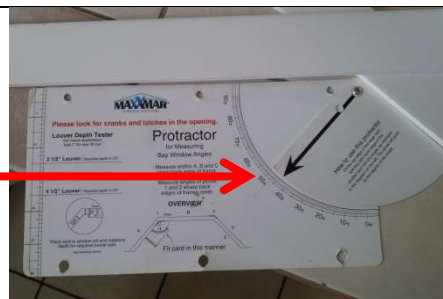
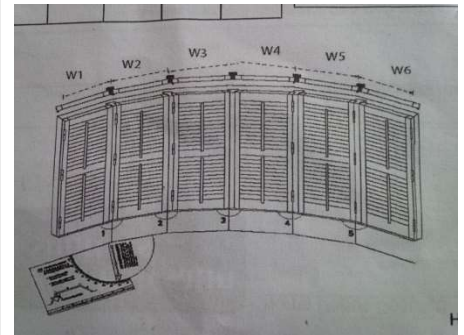
BASE SERVICE CALL: [Signature] 1 100 100 100 100

INSTALLATION TOTAL: [Signature] 1 100 100 100 100

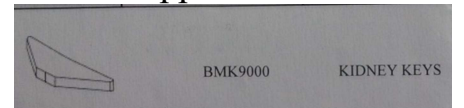
Customer Signature: [Signature] Date: 28 JUNE 2016

Installer Signature: [Signature] Date: 28 JUNE 2016

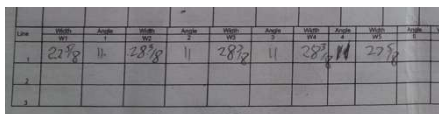
Bay/Bow windows special cm and install instructions.
Protractor use and rear of frame measurements.



Use kidney keys to assemble angled frames for bay window application.



Record angles and panel sizes which will determine post locations.



Line	Width	Angle	Width	Angle	Width	Angle	Width	Angle	Width	Angle
1	22 3/8"	11	28 3/8"	11	28 3/8"	11	28 3/8"	11	22 3/8"	11
2										
3										

Templating instructions for specialty shapes

Have cardboard and utility knife and scissors on hand. Cut smaller access holes into cardboard, tape over opening to template and use pencil to outline frame. Remove cardboard and trim. Fit into frame until cardboard represents the shape required.

Make a copy of template and send one template to factory as per address and shipping info provided by 3D.

