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### 1 PURPOSE

- 1.1 The purpose of this procedure is to provide guidance to all applicable MTS personnel involved in processing North American Field Service (NAFS) calibration business.

### 2 SCOPE


- 2.1 This procedure applies to all applicable MTS personnel involved in the pre-acceptance and acceptance aspects of the NAFS calibration business.

### 3 DEFINITIONS AND ACRONYMS

#### 3.1 Quoter

Individuals authorized to quote services to clients:

- SSS - Service Sales Specialist(s)
- SAE – Service Application Engineer(s)
- ISS – Inside Sales Specialist(s)
- IAM – Inside Account Manager(s)

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- FAM – Field Account Manager(s)
- 3.2 NAFS – North American Field Service
- 3.3 NAFSE – North American Field Service Engineer(s)
- 3.4 RFQ – Request for Quote
- 3.5 VPP – Value Payment Plan
- 3.6 AMP - Assured Maintenance Plan
- 3.7 PO – Purchase Order
- 3.8 SPC – Service Product Codes

#### **4 GRAPHIC**

N/A

#### **5 RESPONSIBILITIES**

- 5.1 NAFS Quality Group: Responsible for working with Quoters when necessary to ensure the calibration services are deliverable.
- 5.2 SSS: Responsible for quoting calibration services.
- 5.3 SAE: Responsible for quoting calibration services.
- 5.4 ISS: Responsible for quoting calibration services.
- 5.5 IAM: Responsible for quoting calibration services.
- 5.6 FAM: Responsible for quoting calibration services.
- 5.7 NAFSE: Responsible for delivering calibration services in a Quality manner and in accordance with customer’s expectations.

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## 6 INSTRUCTION

Most calibrations provided to our customers are reoccurring fixed price calibrations and/or have defined SPC(s). Up front interaction between Quoters and the NAFS Quality group is not normally necessary. In such cases were SPCs are not sufficient, the NAFS Quality group will be contacted.

### 6.1 Process Overview:

All billable MTS service business is executed under one of the following commercial agreement types:


- 6.1.1 “Per-Call” in which the client buys service on a “per-incident” basis. No prior arrangement is required to purchase field services.
- 6.1.2 “Pay-as-you-Go” plan in which the client submits a blanket purchase order to MTS for a not-to-exceed value valid for a defined period of time (generally 1 year). No funds are committed. Any item or service offered by MTS Service may be purchased using this plan.
- 6.1.3 “Value Payment Plan” or “Flexible” funds within a Service Plan in which a specified amount to be spent is established to deliver services as might be required during a defined time period (generally 1 year). Invoicing is in-advance and services may be pre-defined and dated or may be casual, as requested by the client. A payment schedule is set when the contract is established
- 6.1.4 “Assured Maintenance Plan” or “Service Plan” in which the client pays MTS in advance for specific, pre-defined services to be delivered at pre-defined times within an over-all period (generally 1 year). A payment schedule is set when the contract is established.

### 6.2 Service Agreement Requirements:

6.2.1 Pre-Call services are initiated by the receipt of an RFQ or a request for service by MTS from the client.

- 6.2.1.1 The appropriate Quoter issues a quote for the service. If a quote includes non-price listed calibration services, it is the responsibility of the Quoter to review the proposal with the NAFSE. If the NAFSE does not know, the NAFS Quality Group will be contacted.

6.2.1.2 If the quote is acceptable to the client, client forwards a PO to

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the Quoter.

6.2.1.3 The PO is reviewed by the Quoter, MTS Legal (as required), and Order Entry to verify PO is in agreement with the quote and MTS Terms and Conditions. If the Client PO conforms, a service order is opened.

6.2.1.4 The appropriate NAFS contacts the client based on the order to facilitate scheduling of the service.

6.2.2 Pay as You Go.

6.2.2.1 Client issues a not-to-exceed PO to Service Sales

6.2.2.2 The PO is reviewed by the appropriate Quoter, MTS Legal (as required), and Order Entry to verify PO is in agreement with the MTS Terms and Conditions. If the Client PO conforms, a Pay-as-You-Go contract is created to track subsequent purchases against the PO.

6.2.2.3 Subsequent calibration services against the contract are processed in the same manner as a per-call incident.

6.2.3 VPP or Flexible funds on a Service Plan are sold by the Quoter. These require establishment of a pre-paid contract. Service are not be pre-defined.

6.2.3.1 Quoter discusses service needs with client.


6.2.3.2 If the quote is acceptable to the client, client forwards a PO to the Quoter.

6.2.3.3 The PO is reviewed by the Quoter, MTS Legal (as required), and Order Entry to verify PO is in agreement with the quote and MTS Terms and Conditions. If the Client PO conforms, a service order is opened.

6.2.3.4 The appropriate NAFSE contacts the client based on the order to facilitate scheduling of any calibration service.

6.2.3.5 Subsequent calibration services against the contract are processed in the same manner as a per-call incident.

6.2.4 AMP or a Service Plan are sold by a Quoter. These require establishment of a pre-paid contract with a clearly defined list of calibration services to be

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completed in a defined time period.

- 6.2.4.1 Quoter discusses service needs with client.
- 6.2.4.2 The Quoter works with NAFS Quality Group, NAFSE and/or SM to insure any quoted calibration services are deliverable by the NAFS organization.
- 6.2.4.3 If the quote is acceptable to the client, client forwards a PO to the Quoter.
- 6.2.4.4 The PO is reviewed by the Quoter, MTS Legal (as required)., and Order Entry to verify PO is in agreement with the quote and MTS Terms and Conditions. If the client PO conforms, a service order is opened.
- 6.2.4.5 The appropriate NAFSE contacts the client based on the order to facilitate scheduling of the pre-defined service.

## 7 ASSOCIATED QUALITY RECORDS


Required Record	QMS Web Location
Purchase Orders & Quotes	SalesForce.com

## 8 REFERENCE FORMS / TEMPLATES / DOCUMENTS

Form / Template / Document Title	QMS Web Location
N/A	

## 9 CURRENT REVISION TRAINING REQUIREMENTS

LMS Course Number	Read & Test	Read & Acknowledge	Functions or groups that require this training
N/A		X	Section 5 - Responsibilities

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## 10 REVISION HISTORY & APPROVAL

Revision History			
Rev	Description of Change	Author	Effective Date
G	Updated document template, added acronyms and updated responsibilities from QM to NAFS Quality Group, added Field Account Manager as a responsible quoter, added an introductory paragraph for section 6, changed SSE to SSS and added ISS to Acronyms and Responsibilities.	Gary Dahlberg	08/26/2020
F	Template update, update of section 6. Section 7: Add Service Flows and add link to QMS.	M Bintliff	7/20/2018
E	Updated instructions section 6	S. Lacin/M Bintliff	10/17/2014
D	Change to new Document Template	S. Vandale	2/8/2010
C	Updated section II A 3, B3, C5; IIIA	J. Borgstrom	8/8/2008
B	Changes to most text		1/30/2002
A	Placed in to control		12/3/2001

Required Approvers for Current Revision		
Name	Function	Approved Date
Tiia Plath	North American Service Quality Manager	08/28/2020