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1 PURPOSE

- 1.1 The purpose of this procedure is to provide guidance to MTS personnel involved in processing Field Service calibration business.

2 SCOPE

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

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3 DEFINITIONS AND ACRONYMS

3.1 Quoter:

Individuals authorized to quote services to clients:

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

3.2 FSE - Field Service Engineer(s)

3.3 RFQ - Request for Quote

3.4 PO - Purchase Order

3.5 SPC - Service Product Codes

3.6 SQG - Service Quality Group

3.7 SM - Service Manager

4 GRAPHIC

N/A

5 RESPONSIBILITIES


5.1 SQG: Responsible for working with Quoters when necessary to ensure the deliverable is deliverable.

5.2 FAM: Responsible for quoting services.

5.3 IAM: Responsible for quoting services.

5.4 ISS: Responsible for quoting services.

5.5 SAE: Responsible for quoting services.

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- 5.6 SSS: Responsible for quoting services.
- 5.7 FSE: Responsible for delivering services in a quality manner and in accordance with customer expectations.

6 INSTRUCTION

Most calibrations provided to our customers are reoccurring fixed price calibrations and have defined Service Product Codes (SPC). Up front interaction between Quoters and the SQG is not normally necessary. If the customer requests a calibration method that does not have an SPC, the SQG must 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 “Service Plan” in which the client pays MTS in advance for subscription services and/or flexible spending funds (specified amount to be spent on planned or unplanned service needs during a defined period). An advanced payment schedule is set when the contract is established.


6.2 Service Agreement Requirements:

- 6.2.1 Per Call services are initiated by the receipt of a request for quote (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 SSE or SAE to review the proposal with the SQG.
 - 6.2.1.2 If the quote is acceptable to the client, client forwards a PO to the Quoter.
 - 6.2.1.3 The PO is reviewed by the Quoter, MTS Legal (as required), and

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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 FSE 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 SSE /IAM, 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 purchases against the contract are processed in reference to the Pay as You Go contract & billed against the PO in the same manner as a per-call incident.
- 6.2.3 Service Plans are sold by a SSE, SAE, or IAM. These require establishment of a pre-paid contract. Service may or may not be pre-defined
 - 6.2.3.1 SSE, SAE, or IAM discusses service needs with client.
 - 6.2.3.2 The Quoter works with the SQG and the SM to ensure any quoted calibration services are deliverable by the Field Service organization.
 - 6.2.3.3 If the quote is acceptable to the client, client forwards a PO to the Quoter.
 - 6.2.3.4 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 plan is opened, and customer is invoiced.
 - 6.2.3.5 Service Orders are created for any planned services in reference to the Service Plan.
 - 6.2.3.6 The appropriate FSE contacts the client based on the order to facilitate scheduling of any pre-defined service.
 - 6.2.3.7 Subsequent unplanned purchases against the contract are processed in reference to the Service Plan.

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7 ASSOCIATED QUALITY RECORDS


Required Record	QMS Web Location
PO and Quotes	Sales Force

8 REFERENCE FORMS / TEMPLATES / DOCUMENTS

Form / Template / Document Title	QMS Web Location
Service Flows-Roles and Responsibilities	QMS Service Homepage

9 CURRENT REVISION TRAINING REQUIREMENTS

LMS Course Number	Awareness	Read & Acknowledge	Read & Test	Functions or groups that require this training
SABA COURSE		X		

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10 REVISION HISTORY & APPROVAL


Revision History			
Rev	Description of Change	Author	Effective Date
H	<p>Section 1.1 and 1.2 removed NAFS to incorporate international subsidiaries</p> <p>Section 3: Changed NAFSE to FSE and removed NAFS from the acronyms</p> <p>Removed VPP – Value Payment Plan and AMP - Assured Maintenance Plan</p> <p>Added SQG – Service Quality Group</p> <p>Added SM – Service Manager</p> <p>Section 5: Removed NA Quality Group to SQG to incorporate international subsidiaries</p> <p>Section 6: Intro paragraph, 6.2.1.1, and 6.2.3.2 changed FSQM to SQG.</p> <p>Removed: In such cases were SPCs are not sufficient, the SQG must assist.</p> <p>Added: If the customer requests a calibration method that does not have an SPC, the SQG must be contacted.</p> <p>6.1.3 - 6.1.4 and 6.2.3 – 6.2.4 merged under one Service Plan</p> <p>Section 8: Added PO</p>	Tiia Plath	31-Jan-2023
G	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	26-Aug-2020
F	Template update, update of section 6. Section 7: Add Service Flows and add link to QMS.	M Bintliff	20-Jul-2018
E	Updated instructions section 6	S. Lacin/M Bintliff	17-Oct-2014
D	Change to new Document Template	S. Vandale	8-Feb-2010

VERIFY REVISION BEFORE USE

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Print date: 1/31/23

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C	Updated section II A 3, B3, C5; IIIA	J. Borgstrom	8-Aug-2008
B	Changes to most text		30-Jan-2002
A	Placed in to control		3-Dec-2001

Required Approvers for Current Revision		
Name	Function	Effective Date
Tiia Plath	Calibration Quality Engineer	31-Jan-2023

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