THE 3 P'S OF P3

Prepare

- Watch Video Lessons
- Read Instructions

Practice

- Practice on your own with activities/homework

Personalize

- Customize Settings
- Schedule One-on-One Training Sessions

TRAINING GUIDE

ONBOARDING LESSON 1

Activity A:
CUSTOMER RECORD

Activity B:
DISPATCHING

ONBOARDING LESSON 1

Activity A: CUSTOMER RECORD

PREPARE

Activity A: CUSTOMER RECORD

AUDIENCE

This lesson is intended for office managers and dispatchers.

OVERVIEW

The focus of this training is customer and service call management from the Command Center. At the end of this lesson you should be comfortable with the following:

- How to create a customer
- How to find customers
- How to find/create customer data – equipment, notes, etc.
- How to adjust customer record settings

VIDEO PREPARATION

If you have not already done so, please have your company office managers and dispatchers watch the following videos:

Quick Start Showcase

- Managing Customer Records and Invoices

Customer Record

- Customer Record – General Overview
- Customer Record – General Information Section
- Customer Record – Billing Address Section
- Customer Record – Service Location Fields and Buttons
- Customer Record – Service Location Activity Tables

PRACTICE

Activity A: CUSTOMER RECORD

ACTIVITIES

Practice the follow exercises. Reference the document as needed and call us if you have any other questions.

1. Create a new Customer record with the following details. We are going to assume that the Customer is a landlord that owns 2 properties. Use the following data:
    - NAME (Test Customer)
    - EMAIL (Set this to your email address)
    - PHONE (Set this to your cell phone number)
    - ADDRESS (Set this to your company's business address)

2. Review Customer Record and Create Customer Data
    - Add a CUSTOMER NOTE
    - Add a SYSTEM
    - Add EQUIPMENT
    - Add a FILTER
    - Add a CONTACT
    - Add a FILE

    **Notice the Order of which tables are "open" versus "closed".*

3. Create a "Rental" location
    - Use the location of nearby business or the P3 company address:
    - 10707 Corporate Drive, Stafford, TX 77477

4. Find the newly created customer

    SEARCH BY:

    a. FIRST NAME
    b. LAST NAME
    c. PHONE (partial)
    d. EMAIL (partial)
    e. ADDRESS (partial)
    f. RENTAL ADDRESS (partial)

PRACTICE
Activity A: CUSTOMER RECORD

ACTIVITIES – CONSIDERATIONS

While practicing on the customer record, please consider the following:

- Do you like which FIELDS are required?
- Do you want OTHER FIELDS to be required?
- Do you want to change the list of CUSTOMER TYPES?
- Did you set a PHONE TYPE?
- Do you want to change the default COMMUNICATION PREFERENCE?
- How did you START THE PROCESS to create the customer (from the Action button or short cut bar)?
- WHAT FORMAT do you want for your customer name?
- Does this MATCH QB?

ONBOARDING LESSON 1

Activity B: DISPATCHING

PREPARE

Activity B: DISPATCHING

AUDIENCE

This lesson is intended for office managers and dispatchers.

OVERVIEW

The focus of this training is customer and service call management from the Command Center. At the end of this lesson you should be comfortable with the following:

- How to create a service call
- How to reschedule a service call
- How to find service calls
- How to adjust dispatching and service call settings

VIDEO PREPARATION

If you have not already done so, please have your company office managers and dispatchers watch the following videos:

Quick Start Showcase

- Dispatching Basics

PRACTICE

Activity B: DISPATCHING

ACTIVITIES

Practice the follow exercises. Reference the document as needed and call us if you have any other questions.

1. **Create an Unassigned Service Call (from the Customer Record).**

- LEADSOURCE = select one
- Change APPOINTMENT TYPE to "Open"
- Set APPOINTMENT DATE to "Today"
- Service CALL TYPE = No Cool
- ARRIVAL WINDOW = 8 to 10am
- DIAGNOSTIC – leave default
- SCHEDULE STATUS = leave default (Not Confirmed)
- SERVICE CALL DESCRIPTION = "Downstairs not cooling. Call from Customer Record."
- Review PRE-APPOINTMENT QUESTIONNAIRE
- Click – Yes to send APPOINTMENT DETAILS

2. **Assign the Call**

   - Click on the Appointment calendar and ASSIGN THE CALL to a technician
     - ❖ Make the appointment for today

3. **Reschedule the Call**

   - MOVE THE CALL from today until 2 days from now

4. **From the Calendar, Create an Assigned Service Call**

- Click on ANY TIME WINDOW on the calendar
- Click on SERVICE CALL
- SERVICE CALL TYPE = No Cool
- Search for your TEST CUSTOMER
- ARRIVAL WINDOW = what best fits the time selected
- DIAGNOSTIC FEE = leave default
- STATUS = leave default
- LEADSOURCE = select one
- SERVICE CALL DESCRIPTION = "Downstairs not cooling. Call from Customer Record."

PRACTICE

Activity B: DISPATCHING

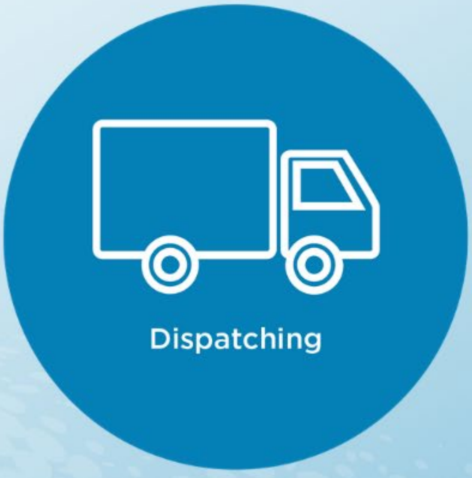
ACTIVITIES CONT'D

5. From the Calendar, Create a Generic Call

- Click on ANY TIME WINDOW on the calendar
- Click on GENERAL APPOINTMENT
- SUBJECT = Team Meeting
- DESCRIPTION = Tech Meeting
- DURATION = 1 Hour
- PHASE

CONSIDERATIONS:

- Would you prefer that the APPOINTMENT DATE has to be added, rather than defaulted?
- Do you want to change the OPTIONS in Service Call Type list?
- Do you want to change the default DURATIONS of Service Call list?
- Do you want to change the ARRIVAL WINDOWS?
- Do you want to change the DIAGNOSTIC FEE options?
- Do you want to change the STATUS NAMES?
- Notice how LEADSOURCE list is the same as customer record? Why 2?
- Review the APPOINTMENT CONFIRMATION email/text
- Notice the SHADING on the calendar
- Notice the COLOR of the status once the appointment is on the calendar
- Notice how you can make RECURRING APPOINTMENTS



ONBOARDING LESSON 1

One on One Training:

CUSTOMER RECORD & DISPATCHING

PERSONALIZE

Activity A: CUSTOMER RECORD

ONE ONE ONE TRAINING W/ ACCOUNT MANAGER

Please be prepared to discuss all of the following:

CUSTOMER RECORD

- Customer Name discussion
- Any changes to the required fields?
- Any changes to the Communication Preferences?
- Any changes to the Customer Type options?
- Any changes to the Lead Source options?
- Any changes to the “open” versus “closed” tables?
- Any questions about additional locations?
- Discussion on System/Equipment naming conventions.
- Any questions on equipment, filters, contacts, files?

CUSTOMER SEARCH

- Review quick search in the tool bar.
- Review different ways to search for customer.

GENERAL SYSTEM PREFERENCES

- Options on the short cut bar

SERVICE CALL/DISPATCHING – GENERAL DISCUSSION

- Service Call vs. Generic Call
  - ❖ Recurring Appointments
- Scheduled Calls vs. Open Calls
  - ❖ Layout discussion
  - ❖ Tech assignment options – from Call Type or Clock icon
- Arrival Windows
- Calendar discussion – moving from day-to-day, changing default duration, shading on calendar
- Review tool bar and calendar icon
- Other business scenarios?

PERSONALIZE

Activity A: CUSTOMER RECORD

ONE ONE ONE TRAINING CONT'D

SERVICE CALL/DISPATCHING – FIELDS & SETTINGS

- Any changes to the Service Call Types?
- Any changed to the Service Call duration? Discussion on what is accounted for in the time allocation?
- Any changes to the Diagnostic Fees? Review the impact to the tech.
- Any changes to the Status Names and Color codes?
- Discuss why we need 2 lead sources.
- Pre-Appointment Questions.

SERVICE CALL/DISPATCHING – EMAIL/TEXT REVIEW

- Any changes to Appointment Confirmation communication?
- Any changes to Day Before Appointment Reminder communication?
- Do you want the company to be notified when there is a new appointment?