THE 3 P'S OF P3

Prepare
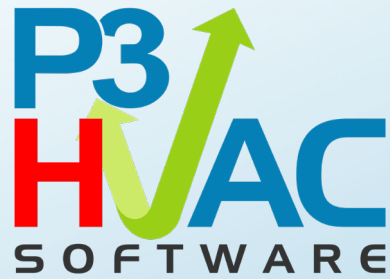- Watch Video Lessons
- Read Instructions

Practice
- Practice on your own with activities/homework

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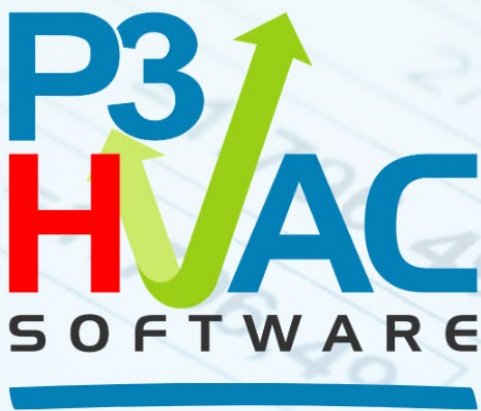- Schedule One-on-One Training Sessions

TRAINING GUIDE
ONBOARDING LESSON 2

Activity A:
INVOICING

Activity B:
FLAT RATE

ONBOARDING LESSON 2

Activity A: INVOICING

PREPARE
Activity A: INVOICING

AUDIENCE

This lesson is intended for office managers, those who invoice in the office and those responsible for setting equipment prices for the company.

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 an invoice

✓ The lifecycle of an invoice

✓ How to find invoices

✓ How to adjust invoice settings

✓ How to apply sales tax

VIDEO PREPARATION

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

Link: **INVOICING SHOWCASE**

PRACTICE
Activity A: INVOICING

ACTIVITIES *Practice the follow exercises.*

1. **Create an Invoice with the Test Customer created in Lesson 1.** *Please try not to concentrate on the pricing, as this will be addressed in this lesson during your one-on-one training.*

   a) ADD A PART (gray button) ("Dual Run Capacitor")

   b) ADD A REPAIR TASK (blue button) ("Dual Run Capacitor")

   c) ADD AN ON-THE-FLY TASK (green button) (description of "Dual Run Capacitor" with Price Method as Set—pick exactly the number you want to appear on invoice)

   d) ADD AN ON-THE-FLY TASK (green button) (description of "Dual Run Capacitor" with Price Method as Calculate-make it 0.5 hours and $25 cost for the part) (you can select to "Save it to Your Library")

   e) ADDRESS (Set this to your company's business address)

   f) ADD A DISCOUNT (use the green button and make the description as "discount", with Price Method as Set—put price at "-25")

   g) MOVE INVOICE ITEMS UP AND DOWN (use arrows)

   h) ADD NOTES
      i. Add a Customer Note
      ii. Add a note to the Dual Run Capacitor repair task
      iii. Add a Technician Note

   i) EMAIL/PRINT INVOICE
      i. Email invoice to self
      ii. Print invoice to PDF

ACTIVITIES (CONTINUED)

1, Create an Invoice, cont.

    j)   STATUS/PAYMENT

           i.   Change status to Complete & Not Paid – Save

          ii.   Collect Payment

2. **Create a second invoice – the same as #1**
   a) DELETE/DECLINE
      i.   Delete the discount for $25 off
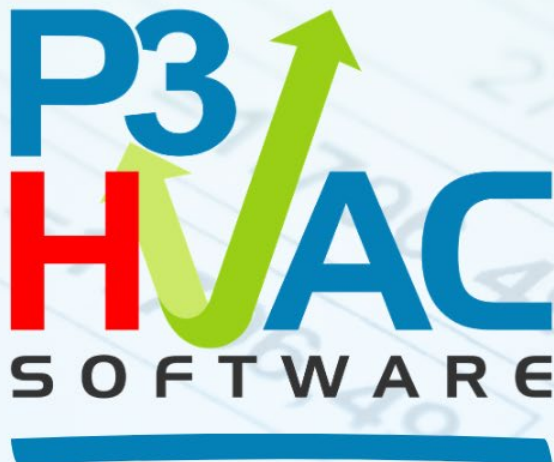   ii.   Decline the Repair Task for Dual Run Capacitor
   b) CUSTOMER INFORMATION - Change the customer information
   c) SALES TAX - Change the sales tax
3. **Reports**
   a) RUN INVOICE REPORT
   b) RUN OVERDUE INVOICE REPORT

ONBOARDING LESSON 2

Activity B:
FLAT RATE

PREPARE
Activity B: FLAT RATE

AUDIENCE

This lesson is intended for office managers and those responsible for setting equipment prices for the company.

OVERVIEW

The focus of this training is the Equipment Sales Module. At this end of this lesson you should be comfortable with the following:

- √ How the software calculates Repair prices
- √ How to change your labor rate
- √ What the software is currently charging for popular repairs
- √ How to change the system calculated price
- √ How to add new repairs

VIDEO PREPARATION

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

Link: Flat Rate Settings Review

PRACTICE
Activity B: FLAT RATE

ACTIVITIES *Practice the follow exercises.*
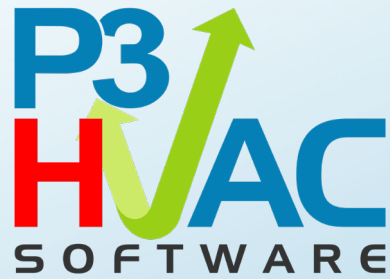
1. **Review TOP 12 Repairs**
   A. Create a New Invoice, add the following and review the pricing
      1. RF101B - R22
      2. RF101D – R410
      3. CA101C – Replace Run Capacitor
      4. CA101E – Replace Dual Run Capacitor
      5. WL101A – Clean/Blowout Drain Line
      6. CN101A – Replace Contactor (2 pole)
      7. IG101A – Replace Hot Surface Ignitor
      8. CB101A – Replace Circuit Board – Standard
      9. CB101B – Replace Circuit Board – OEM
      10. IN101A – Replace Inducer Motor Assembly & Wheel – Std
      11. IN101C – Replace Inducer Motor Assembly & Wheel – OEM
      12. IN104A – Replace Pressure Switch
   B. Considerations
      1. Are the prices all too high or too low?
      2. How many different types of OEM parts should be added?

2. **Create Repair Task**
   A. Clone CB101B and add a different circuit board
   B. Create a new circuit board task

3. *Bonus – Review Top 10 Repairs from the Repair Task List*
   A. *Use the Repair Task List to search and find the Top 10 list above*
   B. *Export Prices to Excel*

ONBOARDING LESSON 2

PERSONALIZE
One-on-One Training:

INVOICING
&
FLAT RATE

PERSONALIZE
Activity A: INVOICING

ONE-ON-ONE TRAINING W/ ACCOUNT MANAGER

Please be prepared to discuss all of the following and click HERE to schedule your training.

INVOICING

INVOICE DISCUSSION
- Review Invoice display – company logo, info, etc
- Review the 4 invoice STATUSES
- Review your DIAGNOSTIC FEES
- What methods of payment you receive

INVOICE BASIC SETTINGS DISCUSSION
- What do you want for the INVOICE PREFIX?
- Do you want to activate the PO FIELD?
- Any changes to the General Settings?
- Any changes to the Display Settings?
- Any changes to the App Settings?
- Any change to the "NOT AUTHORIZED" label?
- Any changes to the SERVICE AGREEMENT NAMES/LABELS?
- Any changes to the TERMS & CONDITIONS?

INVOICE ADVANCE SETTINGS DISCUSSION
- Review SALES TAXES
- Do you want to activate REPAIR FINANCING?
- Any changes to the BILLING TERMS
- Any changes to the DIAGNOSTIC FEES
- Do you want to add any COUPONS?

INVOICE SEARCH
- Review FIND INVOICE REPORT
- Review different ways to search for invoice.
- Review OVERDUE INVOICE REPORT

PERSONALIZE
Activity B: FLAT RATE

ONE-ON-ONE TRAINING, CONT'D

FLAT RATE

FLAT RATE PRICING SETUP
(Under Flat Rate Settings—Rates)
- Review labor rates
- Review Default Discount Rate
- Review Credit Card Rate
- Review Parts Purchase Tax Rate
- Review Part Cost Adjustment

ADVANCED TOPICS
(not covered in training)
Creating Repair Categories
Creating Repair Pages
Support Materials

TOP 10 REPAIR REVIEW
- Too high/too low?

FLAT RATE FUNCTIONALITY REVIEW
- Going to use Flat Rate Repair Pages on App?
- Review the difference between Parts and Repairs
- Clone vs. Create Repair Tasks
- OEM Parts
    - How P3 handles them.
    - How to add additional parts/repairs
- No bulk upload – parts or repairs