

THE 3 P'S OF P3



Prepare

- Watch Video Lessons
- Read Instructions



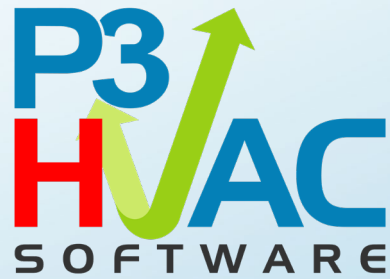
Practice

- Practice on your own with activities/homework



Personalize

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



TRAINING GUIDE

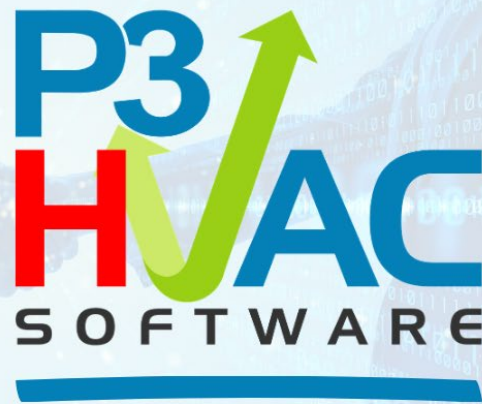
ONBOARDING LESSON 3

Activity A:
SERVICE
AGREEMENTS

Activity B:
DIAGNOSTIC
CHECKLISTS

ONBOARDING LESSON 3

Activity A: SERVICE AGREEMENTS





PREPARE

Activity A: SERVICE AGREEMENTS



AUDIENCE

This lesson is intended for office managers and those responsible for managing service agreements.

OVERVIEW

The focus of this training is Service Agreements. At the end of this lesson you should be comfortable with the following:

- ✓ How to setup Service Agreements
- ✓ How to sell a Service Agreement from an Invoice
- ✓ How to sell a Service Agreement from the Customer Record (Command Center Only)
- ✓ How to track Tune Ups Owed
- ✓ How to schedule a Service Agreement Tune Up
- ✓ How to setup and sell Monthly Billed Service Agreements
- ✓ How to find current Service Agreement customers
- ✓ How to find Service Agreement customers that did not renew

VIDEO PREPARATION

If you have not already done so, please click on the link and have office managers and those responsible for managing service agreements watch the following videos:

Link: [SERVICE AGREEMENTS](#)



PRACTICE

Activity A: SERVICE AGREEMENTS



ACTIVITIES *Practice the follow exercises.*

1. **Create a Service Agreement Template.**
 - a. **ADD YOUR SERVICE AGREEMENT**
 - b. **CONSIDERATIONS**
 - i. Flex Dates vs Fixed Dates
 - ii. Customer vs Location Based Pricing
 - iii. Tax Status/Income Accounts
 - iv. Price Tiers
 - v. Monthly and Annual Billing

2. **Create Service Agreement for Customer FROM CUSTOMER RECORD**
 - a. Go to Test Customer from Lesson 1
 - b. From the Customer Record add a service agreement to the account

3. **Create Service Agreement for Customer FROM INVOICE**
 - a. Go to another test customer record and create a new invoice
 - b. Use the “Stop! Want to Pay Less? Create New Service Agreement” button

4. **SCHEDULE THE TUNE UP TO TECHNICIAN**
 - a. For the Test Customer that now has the service agreement schedule the tune up for a specific date and time with a Technician



PRACTICE

Activity A: SERVICE AGREEMENTS



ACTIVITIES (CONTINUED)

5. Renew Service Agreement

a. FROM INVOICE

- i. Create a service agreement for a test customer and back date it to year ago
- ii. Renew the agreement from the invoice

b. FROM CUSTOMER RECORD - RENEW BUTTON

- i. Create a service agreement for a test customer and back date it to year ago
- ii. Renew the agreement from the customer record new button

c. From Customer Record - NEW BUTTON

- i. Create a service agreement for a test customer and back date it to year ago
- ii. Renew the agreement from the customer record create button

d. Advanced - RENEW WITH MULTIPLE SYSTEMS

- i. Create a service agreement for a test customer with 2 systems and back date it to a year ago
- ii. Renew the agreement from either the invoice or customer record

6. Recurring Monthly Billing (if applicable)

a. CREATE MONTHLY SERVICE AGREEMENT (if using Monthly Billing)

- i. Go to a customer record and create a new invoice
- ii. Use the “Stop! Want to Pay Less? Create New Service Agreement” button
- iii. Select Monthly Billing

b. GO TO UPCOMING RECURRING INVOICE REPORT

ONBOARDING LESSON 3

Activity B: DIAGNOSTIC CHECKLISTS





PREPARE

Activity B: DIAGNOSTIC CHECKLISTS



AUDIENCE

This lesson is intended for office managers and dispatchers.

OVERVIEW

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

- ✓ How to setup a Diagnostic Checklist
- ✓ The difference between Simple and Detailed Components
- ✓ How a Technician completes a Diagnostic Checklist on the App
- ✓ How the Diagnostic is attached to an Invoice
- ✓ How to Edit a Diagnostic created by a Technician

VIDEO PREPARATION

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

Link: [DIAGNOSTIC CHECKLISTS](#)



PRACTICE

Activity B: DIAGNOSTIC CHECKLISTS



ACTIVITIES *Practice the follow exercises.*

1. CREATE A NEW CHECKLIST

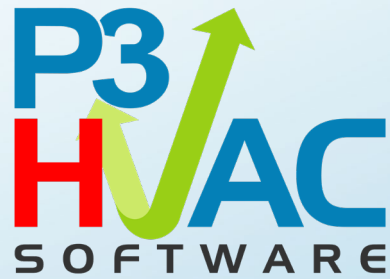
- a. Create Spring Tune Up Condenser Checklist
- b. Add 2 or 3 Components
 - i. Add a Simple Component
 - ii. Add a Detailed Component
- c. Export and Download to App

2. TECHNICIAN/APP

- a. Create Diagnostic
- b. Change Component Status
- c. Add Photos
- d. Add Notes
- e. Add to Invoice
- f. Email Invoice with Diagnostic

3. EDIT TECHNICIAN DIAGNOSTIC

- a. Modify Component Status
- b. Modify Notes
- c. Modify Images



ONBOARDING LESSON 3

PERSONALIZE One-on-One Training:

SERVICE AGREEMENTS & DIAGNOSTIC CHECKLISTS



PERSONALIZE

Activity A: SERVICE AGREEMENTS



ONE-ON-ONE TRAINING W/ ACCOUNT MANAGER

Please be prepared to discuss all of the following and click [HERE](#) to schedule your training if you have not already done so.

SERVICE AGREEMENTS

1. Service Agreement setup
 - Consider what company offers currently or wants to offer
2. Service Agreement creation
3. Service Agreement renewal
4. Service Agreement tune up scheduling
5. Service Agreement dashboard report
6. Service Agreement report
7. Optional-Recurring Monthly Service Agreement Billing (if applicable)





PERSONALIZE

Activity B: DIAGNOSTIC CHECKLISTS



ONE-ON-ONE TRAINING, CONT'D

DIAGNOSTIC CHECKLISTS

1. **Planned Diagnostic Usage**
 - Plan to use Diagnostics?
 - On every call?
 - Just for service agreement tune ups?
 - If not planning to use Diagnostic, then skip activity
2. **Diagnostic Setup**
 - Review current Diagnostic Checklists
 - What needs to be changed?
 - Are different types of Checklists needed?
 - Understand the ability to associated a single Component with multiple Checklists
 - Invoice Display
 - Want to display Diagnostic on Invoice?
3. **Diagnostic Editing**
 - How to modify a Diagnostic created by Technician?

