App Cheat Sheet – Service Call Completion

Complete Service Call with Diagnostic	Complete Service Call with No Diagnostic

1. Click “Schedule” icon
2. Click “Sync” button
3. Before you leave for call – check notes
4. As you leave for the call:
    a. Under “Status” column
    b. Select “In-route”, click yes.
5. When you arrive at the call:
    a. Under “Status” column
    b. Select “Arrived”, click yes.
6. Click “Appointment Details” button
7. Click the green “Start Diagnostic” button
8. Click first “+” button (if there is no system yet), provide system name, click done button.
9. Select system entered.
10. Click the second “+” button to add equipment.
11. Select Equipment Type and add any other details, click Save button (repeat 12, 13 for more equipment)
12. Select system added on step 10
13. Select equipment, checklist displays
14. Complete checklist, save
15. Update status of component by tapping the gray button beside it
16. Update readings if applicable
17. Enter notes for specific component if applicable
18. Click the component
19. Click the shopping cart icon for the desired repair
20. Confirm location, system and quantity.
21. Click “Add to Cart” button
22. Click “Ok” button
23. Click “View Cart”
24. Add more repairs, adjust diagnostic fees if necessary
25. Add or decline service agreement
26. Capture Authorization Signature
27. Capture Work Completed Signature
28. If collecting money, click green Payment button and record how you were paid and how much was collected.
29. Click “Record Payment” button
30. Click “Menu Bar” then the “Schedule” button
31. Click “Today’s Calls/Appointment List” button
32. Under the Status column, click the red “Done”
33. Select appropriate status, click Save
	1. Click “Schedule” icon
	2. Click “Sync” button
	3. Before you leave for call – check notes
	4. As you leave for the call:
	    a. Under “Status” column
	    b. Select “In-route”, click yes.
	5. When you arrive at the call:
	    a. Under “Status” column
	    b. Select “Arrived”, click yes.
	6. Click “Appointment Details” button to review the call
	7. Click Appointment List
	8. Click the “Invoice” icon
	9. Add repairs, adjust diagnostic fees if necessary
	10. Add or decline service agreement
	11. Capture Authorization Signature
	12. Capture Work Completed Signature
	13. If collecting money, click green Payment button and record how you were paid and how much was collected.
	14. Click “Record Payment” button
	15. Click “My Schedule” button
	16. Click “Menu Bar” then the “Schedule” button
	17. Click “Today’s Calls/Appointment List” button
	18. Under the Status column, click the red “Done”
	19. Select appropriate status, click Save

P3 Tech Cheat Sheet – Invoices

Add Repair to Invoice from Library	**Add Repair to Invoice that is Not Found in System Library**
1. From invoice, click blue “Add System Repair” button 2. Select Location if not already selected 3. Select System if not already selected 4. Add comments/notes if necessary 5. Click the search field 6. Add search phrase (must be 3 characters) 7. Click the blue Search Task button 8. In the resulting search list, click the shopping cart icon for desired repair	1. From invoice, click the green “Add New Repair” button 2. Select Location if not already selected 3. Select System if not already selected 4. Add a customer description 5. Provide a Service Agreement Price 6. Provide a Regular Price 7. Click the Save button Please note you can add negative values (discounts) on step 5 and 6 above.
Collecting Payment	**Invoice Buttons**

1. From invoice, before you can receive payment:
    a. You must either add or decline a service agreement
    b. You must get the Authorization signature
2. Click green “Payment” button
3. Select how you are collecting money on the right hand side. If you are processing a credit card outside of Cayan, click “Credit Card - Other”
4. Provide details
5. Change the amount field to the dollar amount actually being received.
6. Click the “Record Payment” button
	1. Save Invoice – will save any changes made on the invoice to the device only.
	2. Save & Sync – will save the changes both on the device and in the cloud
	3. Email Invoice – will save the invoice on the device, save in the cloud and email the invoice to the customer.
	4. Payment – will record a payment and save the invoice and diagnostic to the cloud. If you are receiving the full amount (paid in full) then the software will also email the customer.