Command Center Cheat Sheet –Customer

Create Customer	Find Customer
1. Click the Short Cut Icon - - or click the blue Actions Button at the top and then click “Create Customer” 2. Enter a First and Last Name, OR, Customer Name 3. Enter a Phone Number 4. Double Check Communication Preference 5. Double Check Billing Terms 6. Enter Billing Address 7. Enter Service Location Address, or use the >> icon to copy billing info to service location Please note – Email, Leadsource and Customer Type are not initially required fields. This can be changed via the Customer Settings. Please note – More information can be added by clicking the “Optional Details” links.	1. In the upper right hand corner, search by name, phone, email or address 2. Click either the name of the customer or the edit icon to view more details Notes - If the list is long, consider using the Filter By or Sort By fields to organize the list Notes – the page only display 10 records at a time, use the page controls in the bottom right hand corner to find more information To Find Groups of Customers 1. Click the Reports icon on the left menu 2. Under the Customer Section, click Customers 3. Select the criteria for the group of customers 4. Click Update Report

Command Center Cheat Sheet – Dispatch Calendar

Create Service Call	Add Non-Customer Related Activity
1. Click the Short Cut Icon - - or click the blue Actions Button at the top and then click “Go to Calendar” 2. Calendar defaults to current day. Pick the desired day of the appointment 3. Click on Calendar for desired appointment time for the desired tech 4. Select Service Call 5. Select Service Call Type (purpose of visit) 6. Search for Customer, click blue Search button 7. Select Customer 8. Select Arrival Window 9. Double Check Diagnostic Fee 10. Double Check Status 11. Set the Leadsource 12. Enter Service Call Description 13. Enter optional Notes (visible to Tech only) 14. Click green, Save Button	1. Click the Short Cut Icon - - or click the blue Actions Button at the top and then click “Go to Calendar” 2. Calendar defaults to current day. Pick the desired day of the appointment 3. Click on Calendar for desired appointment time for the desired tech 4. Click General Appointment 5. Enter Subject 6. Enter Description 7. Double check Duration 8. Determine if Recurring (blue button) 9. Click green, Submit button This is used for meetings, vacation, trainings, etc.

P3 Tech Cheat Sheet – Administrative Tasks

Add Technician	**Add Admin/Dispatcher**
1. Click the Settings icon on the left menu 2. Under Users section, click Technicians 3. Click the blue, Create Technician button 4. Set App Access to Yes 5. Enter Technician Name 6. Enter Technician Cell Phone 7. Enter Technician Email 8. Enter Password and Confirm it 9. Enter the Technician's Initials into the Invoice Prefix 10. Enter a starting Invoice Counter/Number (ex, 1000) 11. Enter the Technician's Initials into the Proposal Prefix 12. Enter a starting Proposal Counter/Number (ex, 1000) 13. Click green, Submit button Please note software will send install instructions to the technician's email.	1. Click the Settings icon on the left menu 2. Under Users section, click Admin Users 3. Click the blue, Create New Dealer Admin 4. Enter Name 5. Enter Email 6. Enter Username 7. Enter Password and Confirm it 8. Determine if Admin is Super Admin. Super Admin can add other admins and change permissions of others. 9. Click green, Save button 10. Check the Modules the person should have permission to. Click the plus sign to expand to see the details or to restrict even further 11. Click green, Save button
Change Short Cuts	**Review Settings & Reports**
1. In the top tool bar, click the Edit icon – it is next to the "Find a customer" field 2. Scroll through the list of "Available Shortcuts" 3. Find desired Shortcut and drag it to the "Selected Shortcut" list 4. Order the Shortcuts in the "Selected Shortcuts" list by dragging them up or down 5. Remove a Shortcut from the Toolbar by dragging it from the "Selected Shortcuts" list to "Available Shortcuts" list. Place it anywhere.	1. Both can be found in the left-hand menu 2. All Reports are in the Report menu 3. All Settings are in the Settings menu 4. Both Reports & Settings are organized by Sections 5. Be sure to explore! We have a lot of great functionality. 6. If you are looking for something specific, you can search the Help Desk – www.p3helpdesk.com or email support – support@p3helpdesk.com