

SOLUTIONS**360**  
business.managed

# MASTER CLASS

**Service II: Sell and Set Up with  
Q360 v23.02**

Presenters:  
Tofiq Indawala and Brad Malone  
July 24, 2024

# Target Audience

- Target:
  - Sales, Service and Operations Management
  - Service Coordinators / Admin
  - Accountants
  - Sales Reps
  - Q360 users interested in Service, Contracts
- Optional:
  - Customer Service Reps
  - Project Coordinators
  - Executives
- Pre-requisites: Attended and/or watched
  - Service I: Philosophy [June 2024]



# Learning Objectives

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By the end of this session, you will be able to:

- Configure Q360 to take into account several essential Service Contract areas including Financial (Accounting), Coverage / Response, Service Rates / Charges, and Service Contract Structure
- Differentiate between a Quote for Warranty or Service Contract within a Project, and a Quote for a "stand-alone Service Contract"
- Set up a Service Contract including billing and entitlements
- Manage Service Contract renewals

# Agenda

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1. Introduction
2. Financial Setup
3. Packaging and Selling Service Contracts
  - Types and Structure
  - Entitlements
  - Rates and Coverage
4. Service Contract Billing
5. Service Contract Renewals
6. Key Reports
7. Summary
8. Q & A
9. Wrap Up and References

# Poll #1

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Which of the following Service challenges are you experiencing? (select all that apply)

- a. Having the right Service structure and skill sets to deliver Services
- b. Training the Sales team to sell Services
- c. Being able to communicate Service offerings effectively
- d. Transitioning Customers from Project to Service / Support

# 1. Introduction

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- Service is integral to the total “Solution”
- Selling – Logically connect Service to the System – “opt out”
  - Shift Sales’ paradigm – Lead with the long-term value-based relationship
  - Stand-alone contracts are a packaging conversation – keep the synergy
- Significant opportunity available to generate recurring revenue
- Service Contracts are about packaging types and entitlements / offerings to meet the Customer’s operational needs
- There are many permutations of Service contracts – all should include the essential parameters

## 2. Financial Setup \*with Q360 demo

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- \*Masters setup with:
  - Warranty Flag
  - Deferred Rev Account
  - Service Rev Account
  - RMR Term
- System Config setting for Block Amount Master
- \*Company Setting:
  - Block Suspense Account
  - Revenue Suspense Account
- \*Labor Rates: Needed for Service call billing
- \*Default Extended Account

Let's go to Q360...

# 2. Financial Setup

Take-aways

Master: MAINTENANCE

Master Details Orders / POs Vendors Ext. Accounts Sales Tax Labor Stocking Req. Alt. Items User Defined History Documents Images Trans Profile Comm/Notes Royalty QForms

Standard Cost CAD\$150.00 Price Multiplier Price A Factor 1.40 Selling Prices Price A CAD\$210.00 Service Prices Price A CAD\$50.00

Last Cost CAD\$50.00 Price B Factor 1.27 Price B CAD\$190.50 Price B CAD\$50.00

Average Cost CAD\$50.0000 Price C Factor 1.25 Price C CAD\$187.50 Price C CAD\$50.00

Maximum Cost CAD\$50.00 Price D Factor 1.25 Price D CAD\$187.50 Price D CAD\$50.00

Minimum Cost CAD\$50.00

MSRP CAD\$1,361.25

Sale Revenue 4050 - Service Contract Revenue COGS 6320 - Promotions Deferred Revenue 2040 - Service Contract Revenue Suspense

Sale Asset 1110 - Inventory Fixed Asset 1510 - Equipment

Inv. Susp. Acct. 2030 - Inventory Suspense Service Revenue 4050 - Service Contract Revenue

Height 0.00 Surcharge 0.0000% Service Master No. STD Deliv. Days BMR Term 2 Year

Width 0.00 Surcharge Mstr. No. STD Deliv. Days Autoproduct Flag

Depth 0.00 Def. Warranty Days 0 Invoice Group Termination Date 1900-01-01 Use Kit Detail Price

Weight 0.00

Master By Company

#	Q	CP	Price List	Std. Cost	Last Cost	Avg. Cost	Max. Cost	Min. Cost	Company No.	Date Added	Base Rate	Avg. Cost	Default Currency	Master By Company
1	Q	01	AUDIO VISUAL	CAD\$150.00	CAD\$50.00	CAD\$50.0000	CAD\$50.00	CAD\$50.00	01	2018-09-14 01:55 PM	CAD\$50.00	CAD\$50.00	CDN	Y
2	Q	02	AUDIO VISUAL	CAD\$150.00	CAD\$50.00	CAD\$50.0000	CAD\$50.00	CAD\$50.00	02	2018-09-14 01:55 PM	CAD\$50.00	CAD\$50.00	USD	Y
3	Q	03		CAD\$150.00	CAD\$50.00	CAD\$50.0000	CAD\$50.00	CAD\$50.00	03	2018-10-05 08:47 AM	CAD\$50.00	CAD\$50.00	CDN	N
4	Q	04		CAD\$150.00	CAD\$50.00	CAD\$50.0000	CAD\$50.00	CAD\$50.00	04	2021-02-03 08:12 AM	CAD\$50.00	CAD\$50.00	GBP	Y
5	Q	05												
6	Q	06												
7	Q	4												
8	Q	50												

Company Administration

Company No.

General Revenue Asset Expense **Liability** Equity Misc eAcceptance

Acc. Payable

Default Sales Tax Collected

Inventory Suspense

Revenue Suspense

Block Suspense

Sales Clearing

Project Suspense

Labor Suspense

Bad Debt Suspense

Customer Deposits

Labor Rates

#	Company	Category	Call Type	Master No.	Min. Labor	Labor Rounding
1	Datacom System Integrators	SERVICE		SERVICE	2.00	0.50
2	Datacom System Integrators	PROJMG		PROJMG	1.00	0.50
3	Technology Integrator Inc.	ADMIN		MISC-LABOR	1.00	0.50
4	Technology Integrator Inc.	COMMISSIONING		COMMISSIONING	1.00	0.50
5	Technology Integrator Inc.	DESIGN		DESIGN	1.00	0.50
6	Technology Integrator Inc.	ENGINEERING		ENGINEER	1.00	0.50
7	Technology Integrator Inc.	INSPECTION		INSPECTION	1.00	0.50
8	Technology Integrator Inc.	INSTALL - FINISH		INSTALL - FINISH	1.00	0.50
9	Technology Integrator Inc.	INSTALL - ROUGH		INSTALL - ROUGH	1.00	0.50
10	Technology Integrator Inc.	PROGRAMMING		PROGRAM	1.00	0.50

Default Extended Account Maintenance

Extended Accounts

#	Company	Price List	Category	Sub Category	Type	Post Type	Post Name	Post Process	Journal	Journal
12	Srima Systems Inc.				M	DES-BUILD	INVOICE	POST	AR	COGS
13	Srima Systems Inc.				F	DES-BUILD	INVOICE	POST	AR	COGS
14	Srima Systems Inc.				S	DES-BUILD	INVOICE	POST	AR	COGS
15	Srima Systems Inc.				K	DES-BUILD	INVOICE	POST	AR	COGS
16	Srima Systems Inc.				B	DES-BUILD	INVOICE	POST	AR	COGS
17	Srima Systems Inc.				A	DES-ONLY	ORDER	CREATE	AR	REVENUE
18	Srima Systems Inc.				Q	DES-ONLY	ORDER	CREATE	AR	REVENUE
19	Srima Systems Inc.				L	DES-ONLY	ORDER	CREATE	AR	REVENUE
20	Srima Systems Inc.				M	DES-ONLY	ORDER	CREATE	AR	REVENUE
21	Srima Systems Inc.				F	DES-ONLY	ORDER	CREATE	AR	REVENUE
22	Srima Systems Inc.				S	DES-ONLY	ORDER	CREATE	AR	REVENUE
23	Srima Systems Inc.				B	DES-ONLY	ORDER	CREATE	AR	REVENUE

1 to 65 of 65 Page 1 100 rows per page

Details User Def

Company	Srima Systems Inc.	Post Type	DES-BUILD
Price List		Post Name	ORDER
Category		Post Process	CREATE
Sub Category		Journal	AR
Master Type	A - Asset	Journal Type	REVENUE
		Account No	4025 - DES-BUILD REVENUE



# Poll #2

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How well does your Financial setup support your Service Contract offerings?

- a. We lack a complete and cohesive financial setup
- b. We need to tweak a few configurations to get all our numbers in the correct spots – we're getting there
- c. We need to focus more on the tracking and reporting functions of the financial setup
- d. We have the financial setup structured correctly and are able to track information and make proactive decisions

# 3. Packaging and Selling Service Contracts \*with Q360 demo

## Types and Structure

- \*Warranty
- \*Term – yearly / renewable
- \*RMR / Subscription / Monitoring
- \*Block (Amount vs. Time)
- T&M (out of coverage)

**New Service Contract**

Contract No. [Active Only]

**Header** Customer Level Line Items Orders Time Bills Comments / Notes Cust. Invoices Recurring Dispatches Documents History Profit Srv Calls Activities PO / Voucher SOW

Title: SLA Project 2142 Smith Building  
Sales Rep: John Graham 100.00%  
Contract No.: AQ213618  
NickName: [Empty]  
Alt Sales Rep: [Empty] 0.00%  
Company No.: Technology Integrator Inc. - 01  
Statuscode: [Empty]  
Sales Rep 3: [Empty]  
Branch: HEADOFFICE  
PW Rate No: [Empty]  
Department: PROFESSIONAL DEVELOPMENT SERVICES

**Bill To Address**  
Company: Prebon Technology Ltd.  
Address1: 8500 Sw Creekside Pl  
Address2: Ste 700  
City: Beaverton  
State: OR - Oregon  
Zip/Postal code: 97008-7101  
Country: USA  
Phone: [Empty]  
Contact: [Empty]  
Invoice Site No: [Empty]  
Invoice Contacts: [Empty]  
Contract Information: CONTRACT, GOLD, PLATINUM, RECURRING, SILVER, T&M, WARRANTY  
Next Invoice Date: [Empty]  
RMR Term: WARRANTY  
Con Type: WARRANTY  
Sale Type: SERV-CONT  
Bill In Advance Days: 30  
Bill Frequency: MONTHLY  
Billing Method: [Empty]  
Billing Cycle Day: 1  
Line Item Sync Dates Flag: [Checked]  
Credit Information: Expiry: [Empty], Method: ON ACCOUNT, Terms: NET 30  
Credit Card: [Empty]

**Ship To Address**  
Ship Site: Prebon Technology Ltd. - 8500 Sw Creekside Pl - Beaverton  
Company: Prebon Technology Ltd.  
Address 1: 8500 Sw Creekside Pl  
Address 2: Ste 700  
City: Beaverton  
State: OR - Oregon  
Zip: 97008-7101  
Country: USA  
Phone: (818) 878 7226  
Fax: (818) 878 7422  
Contact: Joe Price

**Tax Appl.:** ACC - VA - ACCOMACK CO - 5.3% (EFF 7-1-13)  
**Currency Type:** USD - American Dollars - US\$  
**Renewal Type:** [Empty]

SubTotal	US\$0.00	Monthly Total	US\$0.00
Tax	US\$0.00	Term Total	US\$0.00
Total	US\$0.00	Block Amount Balance	US\$0.00

PO Name: [Empty]  
PO#: [Empty]

# 3. Packaging and Selling Service Contracts \*with Q360 demo

- \*Warranty vs. SLA / Term
  - Pricing
  - Term
  - Reflected in Quote
- Third Party
  - Vendor sub tab
  - Add-ons, i.e. Monitoring, Licensing
- Pass-Thru
  - Manufacturer access

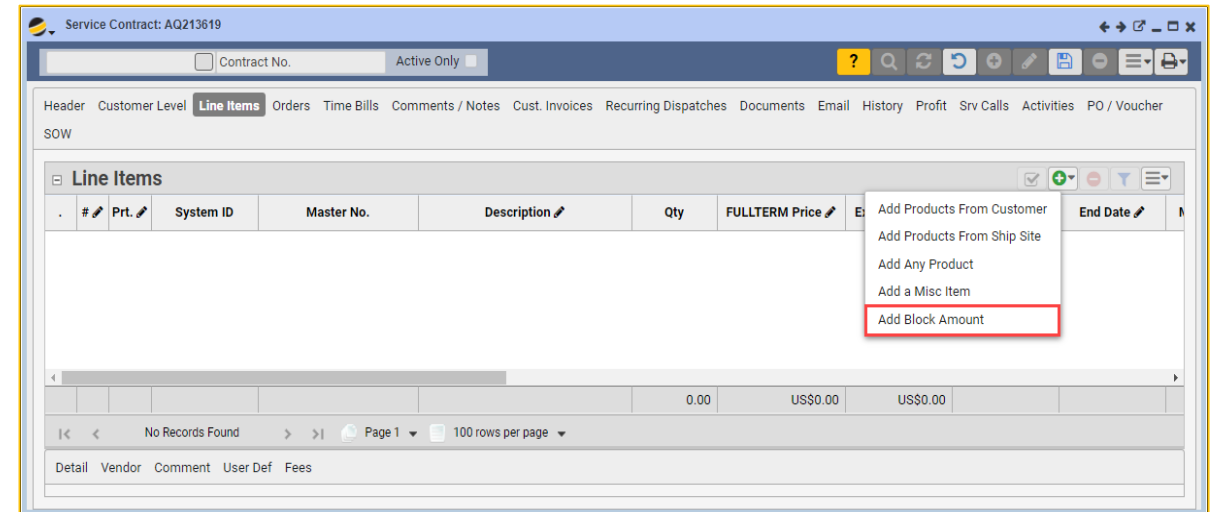
The screenshot displays the 'New Service Contract' form in the Q360 system. The form is organized into several sections:

- Header:** Includes fields for Title (SLA Project 2142 Smith Building), Sales Rep (John Graham), Contract No. (AQ213618), and Company (Technology Integrator Inc. - 01).
- Bill To Address:** Fields for Company (Prebon Technology Ltd.), Address1 (8500 Sw Creekside Pl), Address2 (Ste 700), City (Beaverton), State (OR - Oregon), Zip/Postal code (97008-7101), and Country (USA).
- Ship To Address:** Fields for Company (Prebon Technology Ltd.), Address1 (8500 Sw Creekside Pl), Address2 (Ste 700), City (Beaverton), State (OR - Oregon), Zip (97008-7101), and Phone ((818) 878 7226).
- Contract Information:** This section is highlighted with a red box. It includes fields for RMR Term (WARRANTY), Con Type (SERV-CONT), Sale Type (SERV-CONT), Bill In Advance Days (30), Bill Frequency (MONTHLY), Billing Method, Billing Cycle Day (1), Line Item Sync Dates Flag, Expiry, Method (ON ACCOUNT), and Terms (NET 30).
- Financials:** Includes fields for Tax Appl. (ACC - VA - ACCOMACK CO - 5.3% (EFF 7-1-13)), Currency Type (USD - American Dollars - US\$), and a table showing SubTotal, Tax, Total, Monthly Total, Term Total, and Block Amount Balance, all set to US\$0.00.

# 3. Packaging and Selling Service Contracts \*with Q360 demo

## \*Block

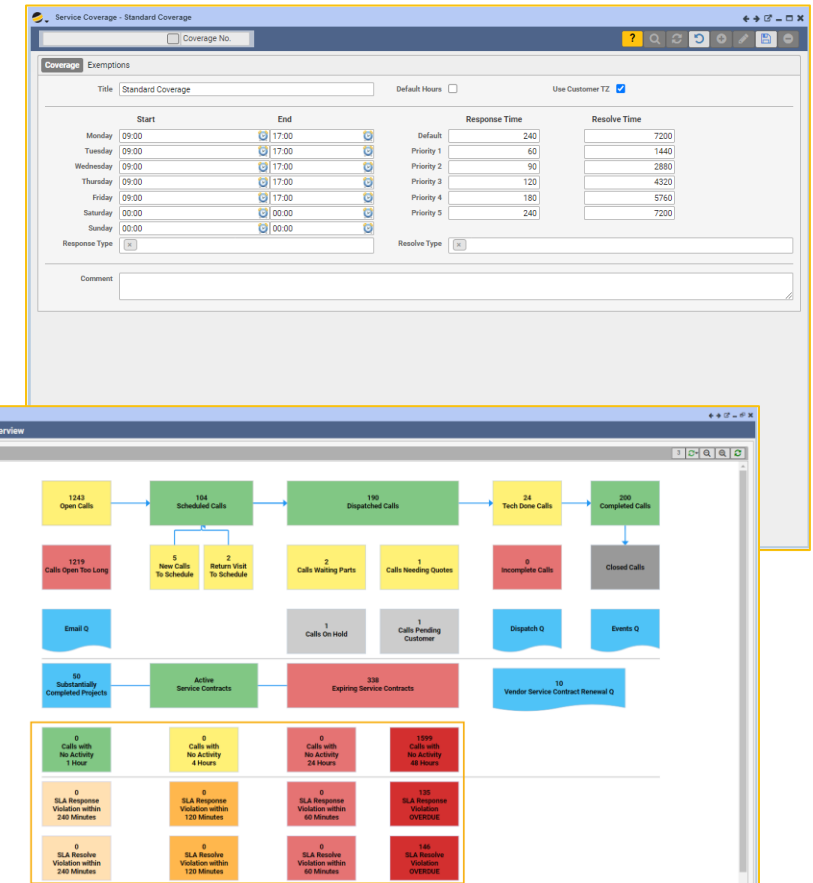
- Dollar Amount vs. Hours
- Alternative to a Term Support Agreement
- Can be used for equipment purchases as well
- Customers pay in advance
- Effort charged against the Block
- Can discount rates (if desired)



# 3. Packaging and Selling Service Contracts \*with Q360 demo

## Entitlements | Coverage and Response

- \*Response time – Service level target time (in minutes) within which to make first response on a Call; option to define further by Priority 1-5
- \*Resolve time – Service level target time (in minutes) within which a solution is administered on a Call; option to define further by Priority 1-5
- \*Packaging
  - Discounts
  - Freight, equipment included



# 3. Packaging and Selling Service Contracts

Sample SLA

- Service Level Selection
- Coverage Term
- Coverage Dates
- Agreement Price and Terms
- Agreement Levels
- Definitions
- Rate Card
- Acceptance / Approval

Support Agreement

Customer Bill to Address:		Onsite Support Location Address:		Office / Agreement Information:	
				Agreement Number:	
				Sales Rep:	
				Support Mgr. Approval:	
				Material List: <input type="checkbox"/> Yes <input type="checkbox"/> No	
				Agreement Type: <input type="checkbox"/> New <input type="checkbox"/> Renewal	
Contact Name:		Parts Ship To:		Intra <input type="checkbox"/> Customer	
Phone Number:		Factory Support:		<input type="checkbox"/> Yes <input type="checkbox"/> No	
Customer Number:		Contact Name:		Support Type:	
Customer P.O.:		Phone Number:		System ID Number:	

Support Level Selection		Coverage Term		Coverage Dates	
<input type="checkbox"/> Standard		<input type="checkbox"/> 1 Year		From:	
<input type="checkbox"/> Plus		<input type="checkbox"/> 3 Year		To:	
		<input type="checkbox"/> 5 Year			

Plus Services Options Requested

See Plus Services Attachment

Agreement Price and Terms	
1) Coverage must be purchased on all components packaged together in a System.	
2) Attached Equipment List represents Model and Serial Number(s) covered by this Agreement (Appendix "A").	
3) Full Payment Due net 30 Days and before Service coverage begins. This Support Agreement Contract will auto-renew at expiration unless otherwise noted.	
4) This agreement does not apply to a system or system components manufactured by companies for which Integrator is not a dealer or distributor or Client/ Owner Furnished Equipment (OFE). Such systems are excluded from any time-sensitive section of this agreement.	
5) Any Applicable State or Local Taxes required will be billed in addition to this amount.	
Total \$	
Tax (XX%) \$	
Agreement Total \$	

Standard Service	
<input type="checkbox"/> Software Assurance <ul style="list-style-type: none"><li>• Update of Control Systems: Firmware as available</li><li>• Update applicable drivers</li></ul>	
<input type="checkbox"/> Bronze Service (see Definitions) <ul style="list-style-type: none"><li>• 5x9 support acknowledgement (Mon – Fri / 8am-3pm in the eastern time zone) within 4 hours</li><li>• On-site response next business day</li><li>• Equipment requiring shipping to manufacturer is/are subject to freight handling charges</li><li>• See Service Fee Guide for service call pricing – Rate Card</li></ul>	
<input type="checkbox"/> Emergency Onsite & After Hours / Weekends <ul style="list-style-type: none"><li>• Emergency Requests must be made directly by phone</li><li>• On-site requests for after-hours and weekends can be arranged 3 business days prior to requested date. See Rate Card for pricing</li></ul>	
<input type="checkbox"/> User Training <ul style="list-style-type: none"><li>• End user training focused on adoption of technology</li><li>• Training is done remote via videoconference and must be scheduled 3 business days in advance</li></ul>	
<input type="checkbox"/> Recertification Maintenance Program <ul style="list-style-type: none"><li>• Covers all equipment listed in Appendix A</li><li>• Semi-annual visits (2 per contract year). See Appendix B for details</li></ul>	

Page 1 of 4

Definitions						
Agreement Levels						
Priority Level		8/5/NBD (Next Business Day)				
		Acknowledgment	Remote	On-Site	Resolution Path	Resolution Report
Platinum		30 minutes	1 hour	3 hours	NBD	2 BD
Gold		1 hour	2 hours	4 hours	2 BD	1 week
Silver		2 hours	4 hours	8 hours	1 week	2 weeks
Bronze		4 hours	8 hours	NBD	2 weeks	4 weeks

Acknowledge is the amount of elapsed time between Client initiation of an issue, or the time Integrator proactively detects a fault, and the time Integrator creates an incident report and alerts Client that an incident has been created.

Remote is the amount of elapsed time between Client initiation of an issue, or the time Integrator proactively detects a fault, and the time an assigned Integrator technician connects to the system, or otherwise contacts Client, and begins remote diagnosis and troubleshooting.

On-Site is the amount of elapsed time between when Integrator has determined that all remote resources have been exhausted, and an on-site presence is required to bring the issue to resolution.

Resolution Path is the amount of elapsed time between the initial Integrator incident report creation, and the Westbury Support Desk determination of an initial resolution path.

Resolution Report is the amount of elapsed time between when Integrator has determined that equipment is required for resolution and the time the equipment will arrive on-site.

Services outside the Scope of the Agreement will be charged according to the Rate Card.

Rate Card	
Rate	Description
Callout \$ 385.00	Service Callout Fee – Includes travel and one hour of service
AV Technician \$ 125.00/hr	General onsite repairs, lamp replacements, equipment pickup/return or recertification tasks
Programmer \$ 165.00/hr	Advanced repairs to digital sound processors, digital control systems, color calibration or audio calibrations
Emergency \$ 210.00/hr	Same Day emergency service
After-Hours \$ 285.00/hr	Pre-booked service call outside normal business hours

All service calls will be billed a minimum 3 hours per Technician rate.  
Integrator retains the right to update the Rate Card at any time.

Agreement Acceptance and Approval			
Company:		Company:	
Signature:		Signature:	
Title:		Title:	
Print Name:		Print Name:	
Date:		Date:	

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### 3. Packaging and Selling Service Contracts \*with Q360 demo

- \*Service Rates
- \*Service Coverage
- Customer-specific Pricing

Let's go to Q360...

Service Contract: AQ213619

Service Contract: AQ213619

Header **Customer Level** Line Items Orders Time Bills Comments / Notes Cust. Invoices

Recurring Dispatches Documents Email History Profit Srv Calls Activities PO / Voucher SOW

**Service Rates** Gold Maintenance Plan **Service Hours** Standard Coverage

User1		User6	
User2		User7	0
User3		NTE:	CAD\$0.00
User4		User9	CAD\$0.00
User5			
User10			

# 3. Packaging and Selling Service Contracts

Take-aways

Contract No.

Active Only

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Header

Customer Level

Line Items

Orders

Time Bills

Comments / Notes

Cust. Invoices

Recurring Dispatches

Documents

History

Profit

Srv Calls

Activities

PO / Voucher

SOW

Title

SLA Project 2142 Smith Building

Sales Rep

John Graham

100.00%

Contract No.

AQ213618

NickName

Alt Sales Rep

0.00%

Company No.

Technology Integrator Inc. - 01

Statuscode

Sales Rep 3

Branch

HEADOFFICE

PW Rate No

Department

PROFESSIONAL DEVELOPMENT SERVICES

Bill To Address

Company

Prebon Technology Ltd.

Address1

8500 Sw Creekside Pl

Address2

Ste 700

City

Beaverton

Zip/Postal code

97008-7101

Phone

Contact

CONTRACT

Invoice Site No

GOLD

Invoice Contacts

PLATINUM

Contract Informat

RECURRING

Start Date

SILVER

Next Invoice Date

T&M

RMR Term

WARRANTY

Con Type

Sale Type

SERV-CONT

Bill In Advance Days

30

Billing Method

Billing Cycle Day

1

Credit Information

Expiry

Method

ON ACCOUNT

Credit Card

Service Contract: AQ213619

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Header

Customer Level

Line Items

Orders

Time Bills

Comments / Notes

Cust. Invoices

Recurring Dispatches

Documents

Email

History

Profit

Srv Calls

Activities

PO / Voucher

SOW

Service Rates

Gold Maintenance Plan

Service Hours

Standard Coverage

User1

User2

User3

User4

User5

User10

Service Contract: AQ213619

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Header

Customer Level

Line Items

Orders

Time Bills

Comments / Notes

Cust. Invoices

Recurring Dispatches

Documents

Email

History

Profit

Srv Calls

Activities

PO / Voucher

SOW

Line Items

#	Prt	System ID	Master No.	Description	Qty	FULLTERM Price	End Date
<div><div>Add Products From Customer</div><div>Add Products From Ship Site</div><div>Add Any Product</div><div>Add a Misc Item</div><div>Add Block Amount</div></div>							

0.00

US\$0.00

US\$0.00

No Records Found

Page 1

100 rows per page

Detail

Vendor

Comment

User Def

Fees



# Poll #3

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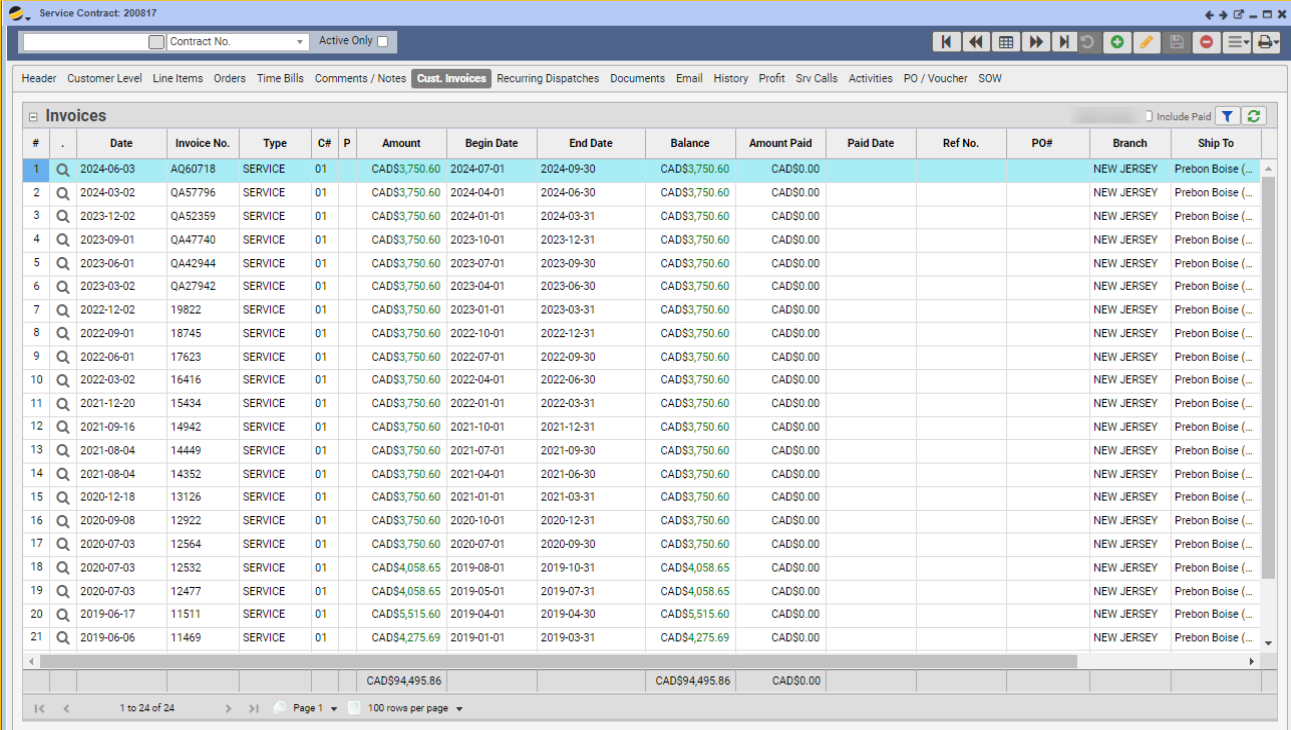
With regards to packaging and selling Service Contracts, our Company:

- a. Allows each salesperson to determine their own packaging – with mixed sales closure results
- b. Does not have a common strategy / structure
- c. Has a common strategy / structure, but we struggle with disciplined follow-through
- d. Is well-structured with clear and viable packaging options with a consistent closure rate

## 4. Service Contract Billing \*with Q360 demo

- \*Single Invoice
- \*Setting Auto Delivery
- \*Term vs. Billing Frequency
- \*Invoice / Deferred Revenue / Revenue Recognition
- \*Invoice Printing / Emailing

Let's go to Q360...



The screenshot displays the 'Service Contract: 200817' interface in Q360. The 'Invoices' tab is active, showing a table of invoices with columns for #, Date, Invoice No., Type, C#, P, Amount, Begin Date, End Date, Balance, Amount Paid, Paid Date, Ref No., PO#, Branch, and Ship To. The table lists 21 invoices, all of which are 'SERVICE' type with a 'C#' of '01'. The 'Amount' column shows values ranging from CAD\$3,750.60 to CAD\$4,275.69. The 'Begin Date' and 'End Date' columns show the billing period for each invoice. The 'Balance' column shows the remaining balance after each payment, and the 'Amount Paid' column shows the amount paid for each invoice. The 'Paid Date' column shows the date the invoice was paid. The 'Ref No.' and 'PO#' columns are empty. The 'Branch' column shows 'NEW JERSEY' for all invoices. The 'Ship To' column shows 'Prebon Boise (...)' for all invoices. The table is sorted by 'Date' in descending order. The bottom of the screen shows a summary row with a total balance of CAD\$94,495.86 and a total amount paid of CAD\$0.00. The page number is 1 of 24, and the page size is 100 rows per page.

#	Date	Invoice No.	Type	C#	P	Amount	Begin Date	End Date	Balance	Amount Paid	Paid Date	Ref No.	PO#	Branch	Ship To
1	2024-06-03	AQ60718	SERVICE	01		CAD\$3,750.60	2024-07-01	2024-09-30	CAD\$3,750.60	CAD\$0.00				NEW JERSEY	Prebon Boise (...)
2	2024-03-02	QA57796	SERVICE	01		CAD\$3,750.60	2024-04-01	2024-06-30	CAD\$3,750.60	CAD\$0.00				NEW JERSEY	Prebon Boise (...)
3	2023-12-02	QA52359	SERVICE	01		CAD\$3,750.60	2024-01-01	2024-03-31	CAD\$3,750.60	CAD\$0.00				NEW JERSEY	Prebon Boise (...)
4	2023-09-01	QA47740	SERVICE	01		CAD\$3,750.60	2023-10-01	2023-12-31	CAD\$3,750.60	CAD\$0.00				NEW JERSEY	Prebon Boise (...)
5	2023-06-01	QA42944	SERVICE	01		CAD\$3,750.60	2023-07-01	2023-09-30	CAD\$3,750.60	CAD\$0.00				NEW JERSEY	Prebon Boise (...)
6	2023-03-02	QA27942	SERVICE	01		CAD\$3,750.60	2023-04-01	2023-06-30	CAD\$3,750.60	CAD\$0.00				NEW JERSEY	Prebon Boise (...)
7	2022-12-02	19822	SERVICE	01		CAD\$3,750.60	2023-01-01	2023-03-31	CAD\$3,750.60	CAD\$0.00				NEW JERSEY	Prebon Boise (...)
8	2022-09-01	18745	SERVICE	01		CAD\$3,750.60	2022-10-01	2022-12-31	CAD\$3,750.60	CAD\$0.00				NEW JERSEY	Prebon Boise (...)
9	2022-06-01	17623	SERVICE	01		CAD\$3,750.60	2022-07-01	2022-09-30	CAD\$3,750.60	CAD\$0.00				NEW JERSEY	Prebon Boise (...)
10	2022-03-02	16416	SERVICE	01		CAD\$3,750.60	2022-04-01	2022-06-30	CAD\$3,750.60	CAD\$0.00				NEW JERSEY	Prebon Boise (...)
11	2021-12-20	15434	SERVICE	01		CAD\$3,750.60	2022-01-01	2022-03-31	CAD\$3,750.60	CAD\$0.00				NEW JERSEY	Prebon Boise (...)
12	2021-09-16	14942	SERVICE	01		CAD\$3,750.60	2021-10-01	2021-12-31	CAD\$3,750.60	CAD\$0.00				NEW JERSEY	Prebon Boise (...)
13	2021-08-04	14449	SERVICE	01		CAD\$3,750.60	2021-07-01	2021-09-30	CAD\$3,750.60	CAD\$0.00				NEW JERSEY	Prebon Boise (...)
14	2021-08-04	14352	SERVICE	01		CAD\$3,750.60	2021-04-01	2021-06-30	CAD\$3,750.60	CAD\$0.00				NEW JERSEY	Prebon Boise (...)
15	2020-12-18	13126	SERVICE	01		CAD\$3,750.60	2021-01-01	2021-03-31	CAD\$3,750.60	CAD\$0.00				NEW JERSEY	Prebon Boise (...)
16	2020-09-08	12922	SERVICE	01		CAD\$3,750.60	2020-10-01	2020-12-31	CAD\$3,750.60	CAD\$0.00				NEW JERSEY	Prebon Boise (...)
17	2020-07-03	12564	SERVICE	01		CAD\$3,750.60	2020-07-01	2020-09-30	CAD\$3,750.60	CAD\$0.00				NEW JERSEY	Prebon Boise (...)
18	2020-07-03	12532	SERVICE	01		CAD\$4,058.65	2019-08-01	2019-10-31	CAD\$4,058.65	CAD\$0.00				NEW JERSEY	Prebon Boise (...)
19	2020-07-03	12477	SERVICE	01		CAD\$4,058.65	2019-05-01	2019-07-31	CAD\$4,058.65	CAD\$0.00				NEW JERSEY	Prebon Boise (...)
20	2019-06-17	11511	SERVICE	01		CAD\$5,515.60	2019-04-01	2019-04-30	CAD\$5,515.60	CAD\$0.00				NEW JERSEY	Prebon Boise (...)
21	2019-06-06	11469	SERVICE	01		CAD\$4,275.69	2019-01-01	2019-03-31	CAD\$4,275.69	CAD\$0.00				NEW JERSEY	Prebon Boise (...)
						CAD\$94,495.86			CAD\$94,495.86	CAD\$0.00					

# 4. Service Contract Billing

Take-aways

Customer #PTL002: Prebon Technology Ltd.

Company: Prebon Technology Ltd. Main Contact: Ginger Rogers. Invoice Site No: Prebon East ...

Address 1: 8500 Sw Creekside Pl. Address 2: Ste 700. City: Beaverton. State: OR - Oregon. Zip/Postal code: 97008-7101. Country: USA. Phone: (818) 878 7226. Alternate Phone: (800) 450 7748. Fax: (818) 878 7422. Web Site: google.com.

Sales Rep: John Graham. Sales Rep 3: . Sales Rep 4: . SubType: END USER. My SubType 2: COMMERCIAL. My Source: CT EXPO '01.

Customer No.: PTL002. Status: ACTIVE. Type: CUSTVEND. Company No.: Technology Integrator I... Branch: HEADOFFICE. Sic: DISTRIBUTOR -. Tracking No.: 9974545. Language: ENGLISH.

☒ Single Service Contract Invoice

Invoice: QA25709 - Posted

Invoice Line Items

Seq.	Qty	Prt.	Master No.	T	Asset No.	Description	Pr
1	1.00	<input checked="" type="checkbox"/>	WARRANTY	M		Warranty	CAD\$1

1 to 1 of 1. Page 1. 100 rows per page.

Def. Revenue: Order Info: Find Product: User Def

Date: 2023-01-01. End Date: 2023-12-31. Line No.: 1.

Price: CAD\$12,000.00. Periods Recognized: 6. Master No.: WARRANTY.

Balance: CAD\$6,000.00. FX Balance: CAD\$0.00. Revenue Recognized: CAD\$6,000.00.

12 periods @ CAD\$1000.00

Warranty

Customer #PTL002: Prebon Technology Ltd.

Company: Prebon Technology Ltd. Main Contact: Ginger Rogers. Invoice Site No: Prebon East LA - Health C...

Address 1: 8500 Sw Creekside Pl. Address 2: Ste 700. City: Beaverton. State: OR - Oregon. Zip/Postal code: 97008-7101. Country: USA. Phone: (818) 878 7226. Alternate Phone: (800) 450 7748. Fax: (818) 878 7422. Web Site: google.com.

Sales Rep: John Graham. Sales Rep 3: . Sales Rep 4: . SubType: END USER. My SubType 2: COMMERCIAL.

Customer No.: PTL002. Status: ACTIVE. Type: CUSTVEND. Company No.: Technology Integrator Inc. - 01. Branch: HEADOFFICE. Sic: DISTRIBUTOR -. Tracking No.: 9974545. Language: ENGLISH.

☒ Single Service Contract Invoice

Auto Delivery

#	Rep. Type	Report Name	Contact	Email
1	Q	Invoices	John Lyall	ilyall@prebon.com
2	Q	Customer Statem...	Thurston Howell	thowell@prebon.com

1 to 2 of 2. Page 1. 100 rows per page.

Company: Vendor: Cust. Profile: Service Alert: Acct. Alert: Reports: Related Companies: Related Sites: Company Groups: User Def: eAcceptance: Req. Skills: Req. Training

Payment Terms: NET 30. Discount: 6.25. Credit Check Type: D&B.

Tax Applicable: ACC - VA - ACCOMACK CO - 5.3% ... YTD Sales: CAD\$100.00. Credit Check Score: 850.

Tax Exempt No.: . Last Year Sales: CAD\$419,190.82. Credit Check Ref: 45874141.

Tax Exempt Reason: . Prev Year Sales: CAD\$149,300.93. Credit Check Result: AAA.

Avg. Payment Days: 0. High Cust. Balance: CAD\$1,535,125.99. Credit Check Date: 2016-12-31.

Default Currency: USD - American Dollars. Credit Limit: CAD\$200,000,000. Collection Q: .

Default Price Level: Price A. Balance: CAD\$1,535,225.99. Collection Level: SPECIAL HANDLING.

Payment Method: ON ACCOUNT. Require PO Flag: . Disable Finance Chrg: .

Business Number: . Jetbuilt Customer No.: .

Credit Cards: ☒ Auto Delivery

# 5. Service Contract Renewals \*with Q360 demo

- \*Renewal Queue
- \*% Increase
- \*Global Increase
- Auto vs. Quote
- Vendor Renewal Queue

Let's go to Q360...

Title	Product No	Prod Desc	Prod End Date	Customer No.	Type	Sub Type
rt Medical Hardware Contract	631627	Product 4(A)	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	994881	Product 4(A)	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	575377	D-term III black station set	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	385044	TV Station License - 24 Port	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	631548	TV Station License - 24 Port	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	575373	D-term III black station set	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	631631	D-term III black station set	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	994885	D-term III black station set	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	1306380	BCP 8 X 24 GLOBAL KIT	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	1318777	Product 2(A)	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	1318802	BCP 8 X 24 GLOBAL KIT	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	385045	BCP 8 X 24 GLOBAL KIT	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	575365	Product 2(A)	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	631544	NEAX 88 Voicemail	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	994893	TV Client License - 24 Port	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	399627	NEAX ISV 2000 KSU	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar

# 5. Service Contract Renewals

Take-aways

Update Service Contract Prices

Update Criteria

Company

ALL — 00

Branch

ALL

Department

ALL

Contract Type

ALL

Sale Type

ALL

Status

ALL

Item Change Date

10

Item Change Reason

ALL

Master No.

Q

Update Details

Unit

Fixed Amount

Amount

Change Date

2024-07-11

10

Change Reason

Vendor Service Contract Renewals

Company

Technology Integrator Inc. — 01

Branch

HEADOFFICE

Department

ALL

Type

ALL

Days Till Expiry

60

Vendor Service Contracts to Renew

#	Contract No.	Vendor	Vendor Start Date	Vendor End Date	Customer No.	Customer	Item Desc	Item Price	Prod Start Date
1	Q 201909	SYNNEX Corporation	2023-03-01 12:00 ...	2023-03-31 12:00 ...	SUN001	Sundance	Master - q type taxable	CAD\$2.00	2019-03-01 12:00 ...
2	Q 201909	SYNNEX Corporation	2023-03-01 12:00 ...	2023-03-31 12:00 ...	SUN001	Sundance	QA_PP Service maintenance Contract for 1 year	CAD\$498.00	2019-03-01 12:00 ...
3	Q 206170	Acme Construction Inc	2024-02-01 12:00 ...	2024-03-29 12:00 ...	COC005	Costco Canada	Misc Item	CAD\$0.00	2022-03-01 12:00 ...
4	Q 203221	AV solution Providers	2020-04-01 12:00 ...	2023-12-31 12:00 ...	SUN001	Sundance	Firewire Card For Onyx 1220, 1	CAD\$300.00	2020-04-01 12:00 ...
5	Q 207003	Acme Construction Inc	2022-03-01 12:00 ...	2022-06-30 12:00 ...	COC005	Costco Canada	Test 2	CAD\$0.00	2022-04-01 12:00 ...
6	Q 201744	Poly	2019-01-01 12:00 ...	2020-09-30 12:00 ...	PTL002	Prebon Technology Ltd.	Polycorn Maintenance	CAD\$0.00	2019-01-01 12:00 ...
7	Q 208064	Acme Construction Inc	2022-12-01 12:00 ...	2022-12-01 12:00 ...	COC005	Costco Canada	Vendor Item	CAD\$1,000.00	2022-12-01 12:00 ...
8	Q A211668	Acme Construction Inc	2023-05-01 12:00 ...	2023-06-30 12:00 ...	COC005	Costco Canada	Warranty	CAD\$557.20	2023-04-01 12:00 ...
9	Q A212844	Acme Inc	2023-10-01 12:00 ...	2023-10-11 12:00 ...	COC005	Costco Canada	1 Year Manufacturer Software Upgrade	CAD\$2.50	2023-10-11 09:10 ...
10	Q 205857	Crestion Electronics, Inc. (MAIN)	2022-01-01 12:00 ...	2023-12-31 12:00 ...	CON005	Compute	3rd Party License/Contract	CAD\$0.00	2022-01-01 12:00 ...

Service Contract: AQ213618

Header

Customer Level

Line Items

Orders

Time Bills

Comm

Recurring Dispatches

Documents

Email

History

Profit

Srv

Title

SLA Project 2142 Smith Buildir

NickName

Statuscode

ACTIVE

PW Rate No

Sales Rep

John Graham

Alt Sales Rep

Sales Rep 3

Contract

Create Renewal Quote/Op

Company No.

Technology Integrator Inc...

Branch

HEADOFFICE

Department

PROFESSIONAL DEVELO...

Bill To Address

Company

Prebon Technology Ltd.

Address1

8500 Sw Creekside Pl

City

Beaverton

Zip/Postal code

97008-7101

Phone

(818) 878 7226

Contact

Invoice Contacts

Ship To Address

Company

Address1

City

Zip

Phone

Contact

Service Contract Renewals

Company

Technology Integrator Inc. ...

Branch

ALL

Sales Rep

ALL

Department

ALL

Count from Days

End Date

Block Balance

\$0.00

Days Till Expiry

60

Type

ALL

Service Contracts to Renew

Title	Product No	Prod Desc	Prod End Date	Customer No.	Type	Sub Type
rt Medical Hardware Contract	631627	Product 4(A)	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	994881	Product 4(A)	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	575377	D-term III black station set	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	385044	TV Station License - 24 Port	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	631548	TV Station License - 24 Port	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	575373	D-term III black station set	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	631631	D-term III black station set	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	994885	D-term III black station set	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	1306380	BCP 8 X 24 GLOBAL KIT	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	1318777	Product 2(A)	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	1318802	BCP 8 X 24 GLOBAL KIT	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	385045	BCP 8 X 24 GLOBAL KIT	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	575365	Product 2(A)	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	631544	NEAX 88 Voicemail	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	994893	TV Client License - 24 Port	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar
rt Medical Hardware Contract	399627	NEAX ISV 2000 KSU	2022-08-01 12:00 ...	JSI001	HARDWARE	Bar

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Service II: Sell and Set Up with Q360 v23.02

# Poll #4

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With regards to Service Contract Billing and Renewals, our Company (select all that apply):

- a. Has no standard processes and therefore, we see mixed results
- b. Has undefined renewal roles and poor renewal rates
- c. Struggles with RMR invoice delivery
- d. Uses the system to trigger reminders and successfully Bill and Renew

## 6. Key Workflows and Reports

- Service Deferred Revenue Subledger
- Service Contract Revenue Forecast
- Service Contract Invoicing Projection
- Service Contract Profitability
- Block Amount Summary / Detail / External User Access
- Service Workflow



Let's go to Q360...

# 7. Summary

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- Integrating your Company's Service Philosophy with your Service Contract setup facilitates easier / better Sales
- Ensuring your Service Contract setup includes all entitlements and attributes will ensure success
- Building the capability to manage, control and report on Service Contracts will build better customer relationships
- Clarifying and standardizing the where / when / how / who of Service Contracts will increase your efficiency and profitability



## 8. Q&A

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# Poll #5

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Would you like to be contacted regarding further training on  
**Service Contracts** in Q360?

- a. Yes
- b. No

# 9. Wrap Up & References

Q360 > Help > Contents

Q360

Window Help

Send Email to Customer Care

Contents

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PROCEDURES

KNOWLEDGE BASE

VIDEOS

RELEASE NOTES

SERVICE CONTRACT

Create a Block Amount Service Contract



6:22

Service Contract Block Amount  
Overview

1. Create a Service Contract manually (see

- Go to **Sales** or **Service** > **Customers**
- Search for the Customer record.
- On the **Srv Cont** tab, click the grid **A**
- Set up the Service Contract including

2. On **Line items** tab, in edit mode, click th

- Select **Add Block Amount**.
- Specify the amount.
- Click **Submit**.

3. Click the **Save** icon.

- System populates Block Amount val

4. In order to apply the Block Amount to th

- Invoice Service Contract form > **Ext**
- Post** the invoice.
  - Notice on the **Service Contract** > **0.00**.

Top Up a Block Amount Service Contract



1:20

Top Up a Block Amount Service  
Contract

1. On the Service Contract **Line items** tab, in edit mode, click the **Add** icon

- Select **Add Block Amount**.
- Specify the amount.
- Click **Submit**.

2. Click the **Save** icon.

- System adds a new line item and for that line, populates Block Amount value on the **Line Items > Detail** subtab > **Block Amount**.

3. In order to apply the Block Amount to the Customer's service call,

- Invoice Service Contract form > **Extended Menu** > **Invoice Block Amount**, and
- Post** the invoice.
  - Notice on the **Service Contract** > **Header** tab > **Block Amount Balance** field now includes the additional top up amount.

Report: Service Contract Profitability

Report #: Q007

Path: Live Data

Purpose:

The Service Contract helps users understand miscellaneous revenue offering a detailed

Key Benefits:

- Enhanced profitability
- Improved associated
- Proactive & shortfalls.

Filters:

The report provides

- Time Period:
- Start Date and
- Company No
- Branch: Filter
- Department:
- Customer No
- Customer Gr
- Summary: P
- Exclude Bill
- Serv Cont No

Columns:

The report is str

Report: Service Contract Invoicing Projection

Report #: Q007

Path: Live Data

Purpose:

The Service Contract for Service Contract financial plan

Key Benefits:

- Accurate finance
- Effective number
- Enhanced renewal

Filters:

- Time Period
- Date Filter
- Company
- Run and S

Columns:

- CONTRACT
- CONTYPE
- BILLFREQU
- INVOICEN
- STARTDA

Report: Service Contract Revenue Forecast

Report#: Q0071

This report determines predictive revenue recognition on service agreements and other warranty/deferred record types by customer in a given period.

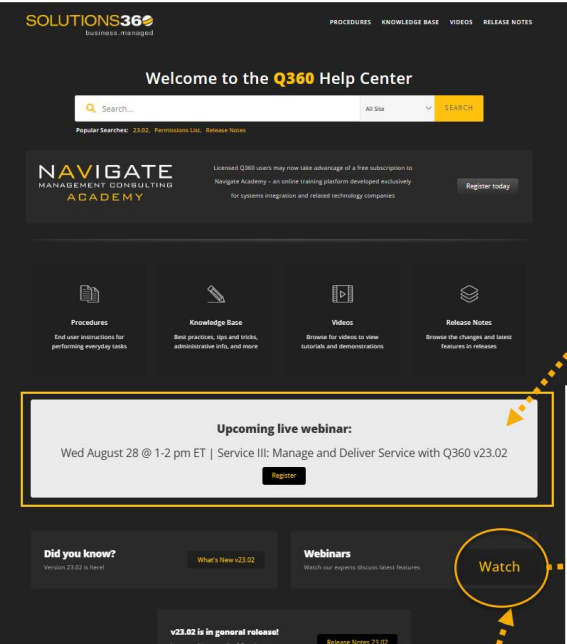
Purpose:

- To see where deferred revenue will be recognized to assist with forecasted decision-making/planning and understanding the value of deferred revenue-based business.
- To see spikes and drops in revenue recognition by customer including detail by contract item. This will assist in understanding when and where more revenue is expected to be recognized to support key decision makers in planning and accounting to have set expectations.
- To keep an eye on existing deferred revenue, whether invoiced or not, to notice customers that may have contracts setup incorrectly or revenue recognized in the wrong place.

Filters:

- Time Period – Start Date/End Date: Operate based on the period for which the revenue will be recognized and will display a different number of columns (broken out by month) depending on the length of time selected.
- CompanyNo
- Branch
- Type: Based on Contract Type, derived from General Codes and presented on Service Contract Header
- Incl. UnBilled: Options are Yes and No. Determines whether unbilled service contracts should be included in the report.

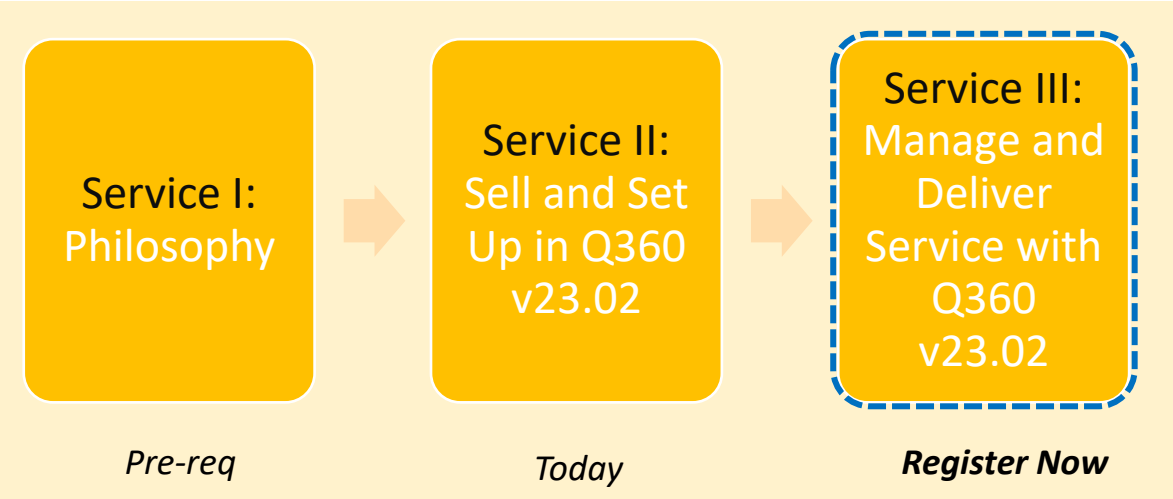
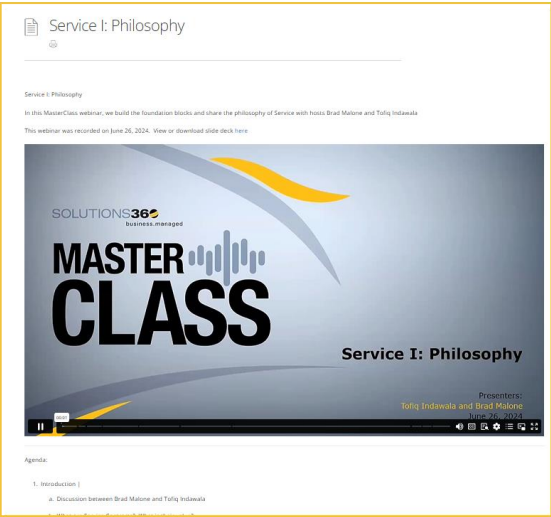
# 9. Wrap Up & References



Watch past recordings

Register

Service I: Philosophy	June 27, 2024
Sales Forecasting with Q360 v23.02	May 30, 2024
Boost Sales Success with Q360 v23.02	March 26, 2024
Project Transition to Service and Closure v23.02	February 23, 2024
Project Work in Process and Change Orders v23.02	January 26, 2024
Highlights for v23.02	December 15, 2023



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# MASTER CLASS

*Thanks...*

**Service II: Sell and Set Up with  
Q360 v23.02**

Presenters:  
Tofiq Indawala and Brad Malone  
July 24, 2024