



SOLUTIONS**360**  
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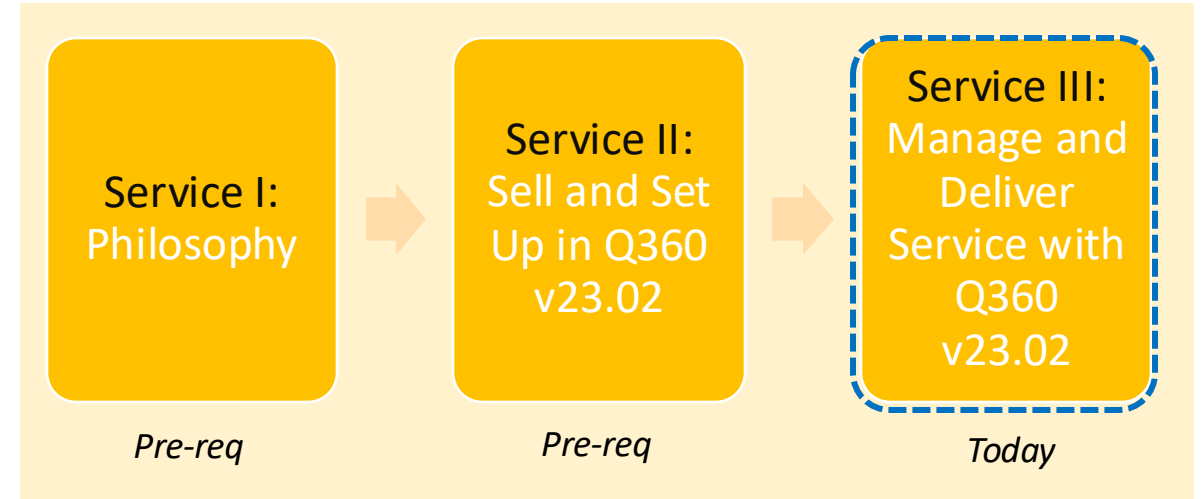
# MASTER CLASS

**Service III: Manage and Deliver  
with Q360 v23.02**

Presenters:  
Tofiq Indawala and Brad Malone  
August 28, 2024

# Target Audience

- Target:
  - Sales, Service and Operations Management
  - Service Coordinators / Admin
  - Customer Service Reps
  - Users interested in Service, Service Contracts
- Optional:
  - Project Coordinators
  - Executives
  - Sales Reps
  - Accountants
- Pre-requisites: Attended and/or watched (available on Help Center)
  - Service I: Philosophy [June 2024]
  - Service II: Sell and Set Up with Q360 v23.02 [July 2024]



# Learning Objectives

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

- Schedule and dispatch Service Calls
- Track time against, close and bill Service Calls
- Monitor Service Contract performance using workflows and reports
- Set up Customer access to the Customer Portal to self-serve

# Agenda

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1. Introduction
2. Back Office Functions: Customer / Site setup, Call setup / management, communication, scheduling, dispatch
3. Techs: Time billing, notes / checklists, Inventory management, Call completion
4. Accounting: Billing, Call Revenue / COGS recognition
5. Customer Portal: Admin setup, Dashboards, Reports
6. Reports
7. Summary
8. Q&A
9. Wrap up and Resources

# 1. Introduction

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- How did we get here?
  - Service Mindset
  - Service Philosophy / Common Framework
  - Service Contract(s)
  - Service Attributes
  - Service Configurations
- What is a Call?
  - Reactive Work / Recurring
  - Single Instance
  - Minimal single-function labor
  - Transactional



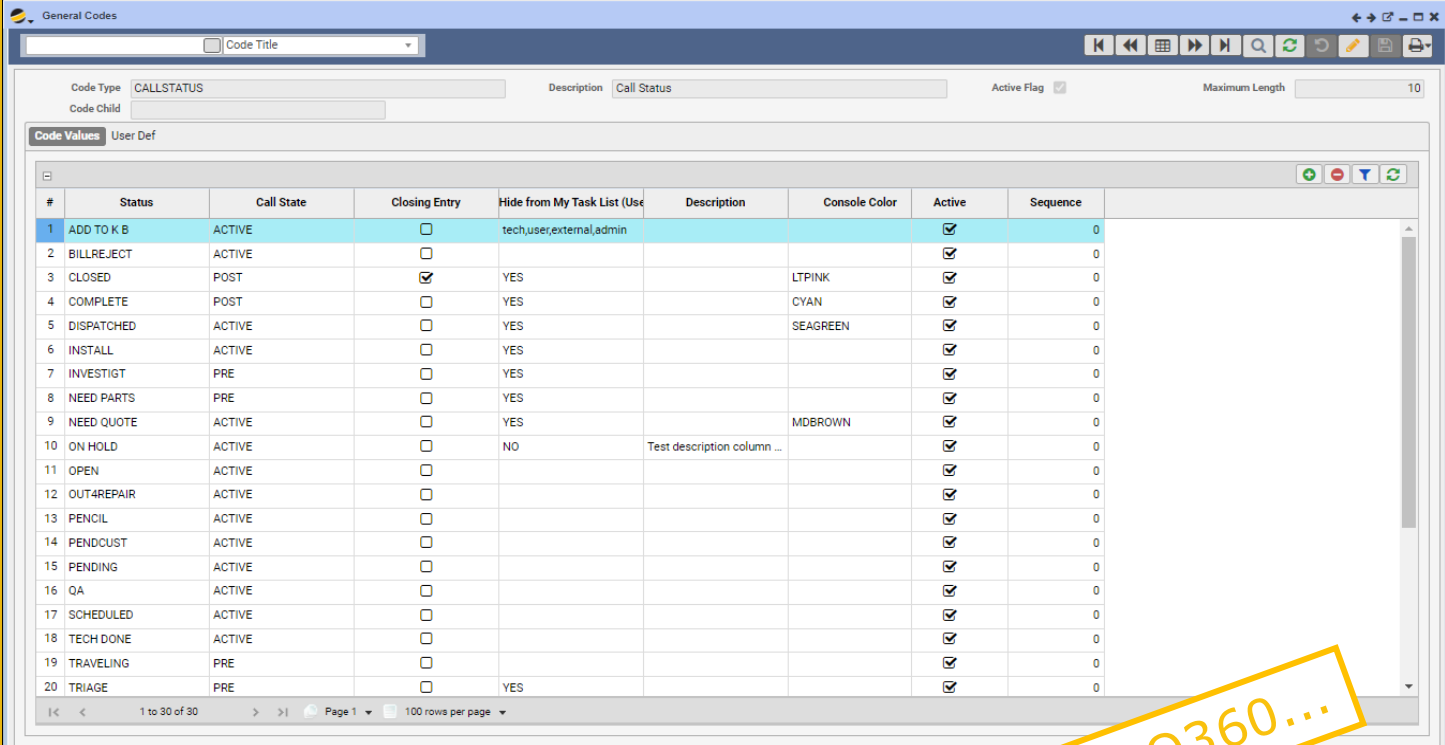
## 2. Back Office Functions – Customer / Site setup

- Service Alerts subtab
  - Customer
  - Site
  - Product
- Acct Alert subtab
  - Customer
- Techs subtab
- Recurring Calls tab
  - Product
  - Service Contract
- Access Info tab
  - Site
  - Product

Let's go to Q360...

## 2. Back Office Functions – Call Setup

- Products and Systems > Service
- General Codes
  - Call Status
- Open Service Calls
- Set up Recurring Calls
  - Maintenance
  - Inspections
  - Qforms option
- Key Service Call fields



#	Status	Call State	Closing Entry	Hide from My Task List (User)	Description	Console Color	Active	Sequence
1	ADD TO K B	ACTIVE	<input type="checkbox"/>	tech,user,external,admin			<input checked="" type="checkbox"/>	0
2	BILLREJECT	ACTIVE	<input type="checkbox"/>				<input checked="" type="checkbox"/>	0
3	CLOSED	POST	<input checked="" type="checkbox"/>	YES		LTPINK	<input checked="" type="checkbox"/>	0
4	COMPLETE	POST	<input type="checkbox"/>	YES		CYAN	<input checked="" type="checkbox"/>	0
5	DISPATCHED	ACTIVE	<input type="checkbox"/>	YES		SEAGREEN	<input checked="" type="checkbox"/>	0
6	INSTALL	ACTIVE	<input type="checkbox"/>	YES			<input checked="" type="checkbox"/>	0
7	INVESTIGT	PRE	<input type="checkbox"/>	YES			<input checked="" type="checkbox"/>	0
8	NEED PARTS	PRE	<input type="checkbox"/>	YES			<input checked="" type="checkbox"/>	0
9	NEED QUOTE	ACTIVE	<input type="checkbox"/>	YES		MDBROWN	<input checked="" type="checkbox"/>	0
10	ON HOLD	ACTIVE	<input type="checkbox"/>	NO	Test description column ...		<input checked="" type="checkbox"/>	0
11	OPEN	ACTIVE	<input type="checkbox"/>				<input checked="" type="checkbox"/>	0
12	OUT4REPAIR	ACTIVE	<input type="checkbox"/>				<input checked="" type="checkbox"/>	0
13	PENCIL	ACTIVE	<input type="checkbox"/>				<input checked="" type="checkbox"/>	0
14	PENDCUST	ACTIVE	<input type="checkbox"/>				<input checked="" type="checkbox"/>	0
15	PENDING	ACTIVE	<input type="checkbox"/>				<input checked="" type="checkbox"/>	0
16	QA	ACTIVE	<input type="checkbox"/>				<input checked="" type="checkbox"/>	0
17	SCHEDULED	ACTIVE	<input type="checkbox"/>				<input checked="" type="checkbox"/>	0
18	TECH DONE	ACTIVE	<input type="checkbox"/>				<input checked="" type="checkbox"/>	0
19	TRAVELING	PRE	<input type="checkbox"/>				<input checked="" type="checkbox"/>	0
20	TRIAGE	PRE	<input type="checkbox"/>	YES			<input checked="" type="checkbox"/>	0

Let's go to Q360...

## 2. Back Office Functions – Call Setup

- Key Service Call Fields

- Company / Site
- Branch / Department
- Status
- Priority
- Call Type
- Bill Type
- Caller / Details
- Contact / Details
- Product Info
- Problem
- Solution (typically completed by Tech)

The screenshot displays the 'Add Call' form in a software application. The form is organized into several sections with tabs for 'Company', 'Site', 'Invoice To', 'Product', 'Caller', 'Problem', and 'Solution'. The 'Company' tab is active, showing fields for 'Company' (Prebon Technology Ltd.), 'Site' (Prebon Technology Ltd. - 8500 Sw Creekside PI - Beaverton), 'Branch' (HEADOFFICE), 'Department' (ENGINEERING), 'Status' (OPEN), 'Priority' (3.00 - Priority 3), 'Call No.' (503791), 'ETA Date' (10), 'CSR', 'Current Tech', 'Call Type' (Please choose...), 'Disp. Q', 'Sales Rep' (John C.), 'Alt Sales Rep' (none), 'Sales Rep 3' (none), 'Call Role 1', 'Call Role 2', 'Nickname', 'Est. Fix Time2' (0.00), 'Est. Fix Time' (0.00), 'Product' (none), 'Caller' (none), 'Phone' (Ext. Contact Method (Any)), 'Problem' (Please choose...), 'Solution' (Please choose...), 'Incident No.', 'Billable' (checked), 'Bill Amount' (US\$0.00), 'Category', 'Sub Category', 'TB Category', 'TB Sub Category', 'Prod. Det.' (none), 'Contact' (Ext. Contact Method (Any)), and 'Phone' (Ext. Contact Method (Any)).



## 2. Back Office Functions – Call Management

- Service Level Agreements (SLAs)

- Triage – assess priority

  - Dispatch Q

  - Queues (+ strategies)

    - e.g. team-based, filtering

- Schedule

  - Customer date preferences

  - Tech scheduling

- Dispatch

  - Manual, Nightly Automated

  - Appears in My Task List

The screenshot displays the 'Dispatch Q' application window. At the top, there's a menu bar with options like File, View, Maintenance, Sales, Accounting, Projects, Service, Inventory, HR, Survey, Live Data, Workflow, and Dashboards. Below the menu, there are search filters for Name, Zone, Call Type, Company, Branch, Department, CSR/Tech, and Status. The main area shows a 'Search Results' table with columns: #, Call No., Sel, Pri, Start Timebill, Date, Company, Site Name, Problem, Status, Dispatch Q, Est. Fix Time, TB, Zone, City, State, System ID, CSR, Tech Assigned, Dispatch Date, and Dispat. The table contains 25 rows of data, mostly from 'Costco Canada' and 'Prebon Technology Ltd.', with various problem codes like 'MONTHLY INSPECTION' and 'TEST PROBLEM CODES'. A yellow callout box with the text 'Let's go to Q360...' is overlaid on the bottom right of the table.

#	Call No.	Sel	Pri	Start Timebill	Date	Company	Site Name	Problem	Status	Dispatch Q	Est. Fix Time	TB	Zone	City	State	System ID	CSR	Tech Assigned	Dispatch Date	Dispat
1	Q 502057	<input checked="" type="checkbox"/>	3.00		2015-05-23	Prebon Technology Ltd.	Prebon - Oakland - Life Safety	MONTHLY INSPECTION	OPEN	INSPECTION	0.00	0.00	EAST	Markham	ON	S239522	JGRAHAM			
2	Q 503031	<input type="checkbox"/>	3.00		2023-01-26	Costco Canada	Costco Canada	TEST PROBLEM CODES	OPEN	BOX	0.00	0.00	VIRT	Mississauga	ON		AAKIL			
3	Q 503095	<input type="checkbox"/>	3.00		2023-03-27	AV PRO	AV PRO		OPEN	T&M	0.00	0.00		Mississauga	ON		AAKIL			
4	Q 503204	<input type="checkbox"/>	3.00		2023-05-03	Costco Canada	Costco Canada		OPEN	T&M	0.00	0.00	VIRT	Mississauga	ON		AAKIL			
5	Q 503293	<input type="checkbox"/>	3.00		2023-06-01	Costco Canada	Costco Canada		OPEN		0.00	0.00	VIRT	Mississauga	ON					
6	Q 503294	<input type="checkbox"/>	3.00		2023-06-15	Costco Canada	Costco Canada		OPEN		0.00	0.00	VIRT	Mississauga	ON					
7	Q 503304	<input type="checkbox"/>	3.00		2023-07-08	Costco Canada	Costco Canada		OPEN		0.00	0.00	VIRT	Mississauga	ON					
8	Q 503314	<input type="checkbox"/>	3.00		2023-09-15	Costco Canada	Costco Canada		OPEN		0.00	0.00	VIRT	Mississauga	ON					
9	Q 503431	<input type="checkbox"/>	3.00		2023-07-21	Costco Canada	Costco Canada		OPEN		0.00	0.00	VIRT	Mississauga	ON					
10	Q 503452	<input type="checkbox"/>	3.00		2023-08-21	Costco Canada	Costco Canada		OPEN		0.00	0.00	VIRT	Mississauga	ON					
11	Q 503563	<input type="checkbox"/>	3.00		2023-08-01	Costco Canada	Costco Canada		OPEN		0.00	0.00	VIRT	Mississauga	ON	24294178	AERICKSON	AAKIL		
12	Q 503566	<input type="checkbox"/>	3.00		2023-08-01	Costco Canada	Costco Canada		OPEN		0.00	4.00	VIRT	Mississauga	ON	24294178	AERICKSON	AAKIL		
13	Q 503567	<input type="checkbox"/>	3.00		2023-09-01	Costco Canada	Costco Canada		OPEN		0.00	0.00	VIRT	Mississauga	ON	24294178	AERICKSON			
14	Q 503572	<input type="checkbox"/>	3.00		2023-10-20	Costco Canada	Site 2		OPEN		0.00	0.00				25546470				
15	Q 503614	<input type="checkbox"/>	3.00		2023-12-13	Costco Canada	Costco Canada		OPEN	T&M	0.00	0.00	VIRT	Mississauga	ON		AAKIL			
16	Q 503635	<input type="checkbox"/>	3.00		2024-01-05	Costco Canada	Costco Canada	VOIP TEST	OPEN		0.00	0.00	VIRT	Mississauga	ON			AAJULAR		
17	Q 503636	<input type="checkbox"/>	3.00		2024-01-06	Costco Canada	Costco Canada	VOIP TEST	OPEN		0.00	0.00	VIRT	Mississauga	ON			AAJULAR		
18	Q 503659	<input type="checkbox"/>	3.00		2023-09-21	Costco Canada	Costco Canada		OPEN		0.00	0.00	VIRT	Mississauga	ON					
19	Q 503669	<input type="checkbox"/>	3.00		2023-11-15	Costco Canada	Costco Canada		OPEN		0.00	0.00	VIRT	Mississauga	ON	123123123		AAKIL		
20	Q 503670	<input type="checkbox"/>	3.00		2023-10-01	Costco Canada	Costco Canada		OPEN		0.00	0.00	VIRT	Mississauga	ON	24294178	AERICKSON			
21	Q 503671	<input type="checkbox"/>	3.00		2023-11-20	Costco Canada	Site 2		OPEN		0.00	0.00				25546470				
22	Q 503672	<input type="checkbox"/>	3.00		2023-10-20	Costco Canada	Testttt	TEST PROBLEM CODES	OPEN		0.00	0.00		Arlington	VA	12455271				
23	Q 503673	<input type="checkbox"/>	3.00		2023-10-20	Costco Canada	Costco Canada		OPEN		0.00	0.00	VIRT	Mississauga	ON	12455271				
24	Q 503691	<input type="checkbox"/>	3.00		2023-10-21	Costco Canada	Costco Canada		OPEN		0.00	0.00	VIRT	Mississauga	ON					
25	Q 503700	<input type="checkbox"/>	3.00		2023-12-15	Costco Canada	Costco Canada		OPEN		0.00	0.00	VIRT	Mississauga	ON	123123123		AAKIL		

## 2. Back Office Functions – Communication

- Email alerts
  - Status Change
  - Dispatched
  - Token list available on Help Center
- Tracking Number

The screenshot shows a web-based interface for configuring an email alert template. The title bar reads "Email Alert Template #10536932: Service Call Closed". Below the title bar, there are tabs for "Conditions", "Email Template" (which is selected), "Popup Template", and "User Def". The "Email Template" tab displays the following fields:

- From:** noreply@solutions360.com
- Recipients:** customer@solutions360.com
- CC:**
- Subject:** QA Dev: Ticked Closed: {{CALLNO}}

Below these fields is a rich text editor with a menu bar (File, Edit, Format, View, Insert) and a toolbar. The editor contains the following text:

You support ticked is now closed.

Ticket Details:

CallNo: {{CALLNO}}  
Call Date: {{DATE}}  
Problem: {{DETAIL}}  
Solution: {{SOLUTIONDESC}}

How did we do?

Below this text are three circular icons representing different sentiment levels: a red sad face, a yellow neutral face, and a green happy face.

--BEGIN CUSTOM FOOTER

This email is intended for testing and training purposes only  
You have received this email from Q360 QA Database

At the bottom of the editor, there is a status bar showing "DIV > SPAN" and "Content Type text/html". A small note at the bottom right states: "Replacement tokens must be in the form: {{columnname}}".

Let's go to Q360....

# Poll #1 – Call Management

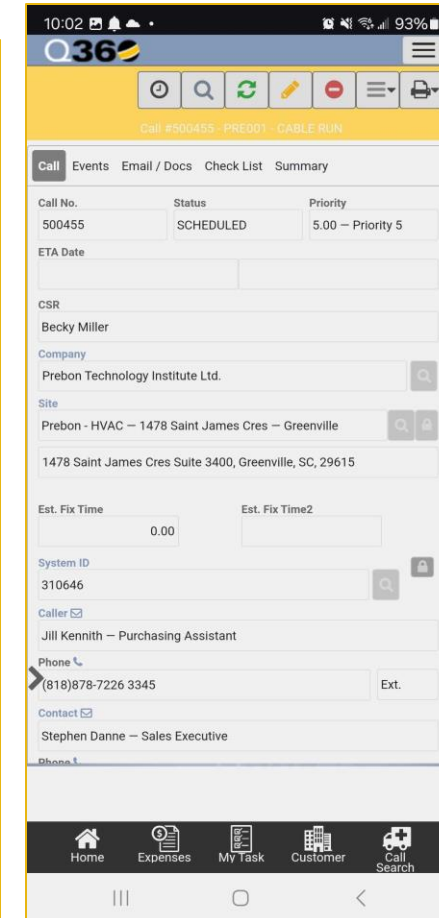
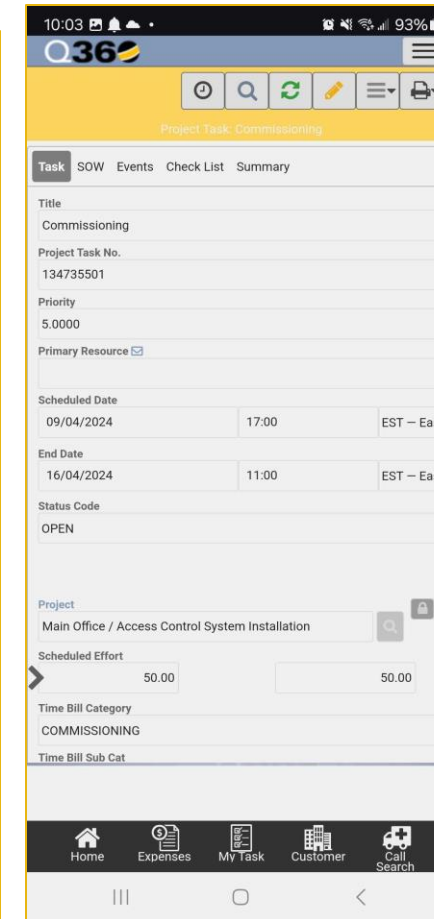
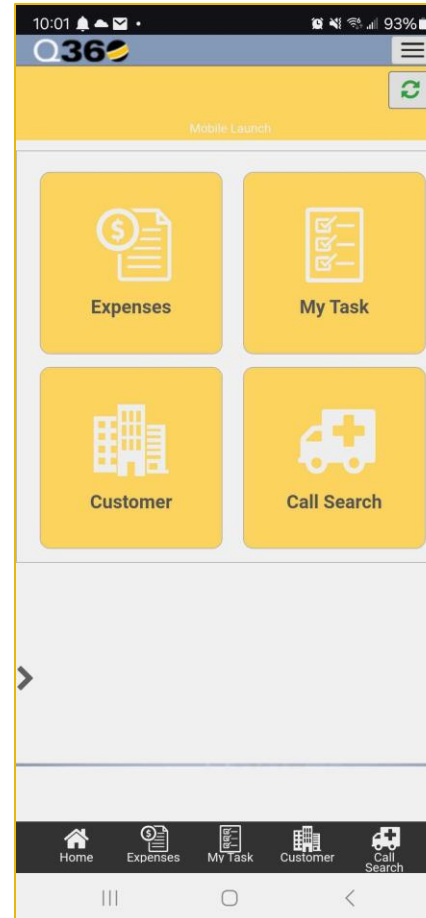
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Which of the discussed topics could you improve upon?  
(select all that apply)

- a. Service / Acct / Email Alert
- b. Access Info
- c. Recurring Calls
- d. Call Management: SLA and Triage
- e. Field Scheduling

# 3. Techs – Dispatch, Instructions, Schedule, Work

- Tech View (typical practice – basic functions)
- My Task List
- Time Billing
- Checklist
- Events
  - Categorizable, filterable
    - Parts requests
    - Notes (Back Office instruction)
    - RMA
    - Recommendation(s)



# 3. Techs – Call Completion

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- Parts used (Extended Menu > Tech Inventory)
- Update checklist (if necessary)
- Schedule return visits (if necessary)
- Solution Code
- Customer Signature
- Update Call Status
- In-field CC payments with FLEX license (beta)

Let's go to Q360....

# Poll #2 – Tech Topics

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Which of the discussed topics could you improve upon?  
(select all that apply)

- a. Scheduling
- b. Field Thoroughness / Field Compliance / Field Notes
- c. Correct Solution Capture (code / notes)
- d. Better use of Events

## 4. Back Office Functions – Accounting

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- Post timebills (Service Management)
- Check Dispatch Close
- Preview Billing Report
- Call Billing
  - Fixed
  - T&M
- Revenue / COGS recognized at Invoice posting
- Credit Card payment option (beta)

Let's go to Q360...

# 4. Back Office Functions – Accounting

GL Accounts	Installation/ Projects	Maintenance Agreement	T&M	Warranty	Box
Project: Material	✓				
Project: Labor	✓				
Project: Sub-Cont	✓				
T&M: Material			✓		
T&M: Labor			✓		
T&M: Sub-Cont			✓		
Maint: Material		✓			
Maint: Labor		✓			
Maint: Sub-Cont		✓			
Warranty: Material				✓	
Warranty: Labor				✓	
Warranty: Sub-Cont				✓	
Box Sale					✓
Freight	✓	✓	✓	✓	✓



# Poll #3 – Accounting Topics

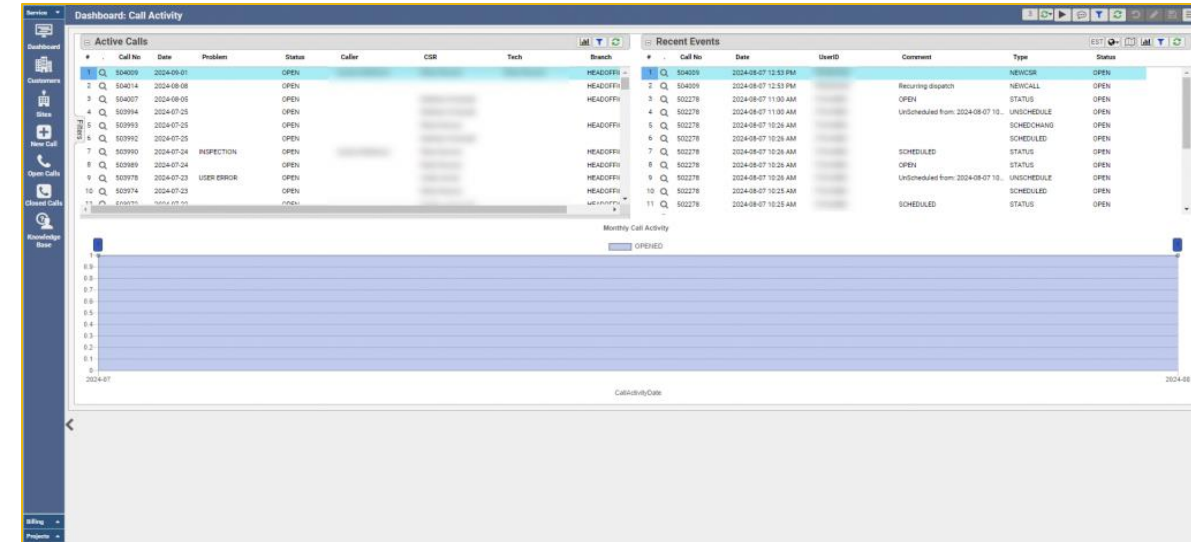
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Which of the discussed topics could you improve upon?  
(select all that apply)

- a. More aligned GL structure
- b. Billing efficiency
- c. Call closing process

# 5. Customer Portal

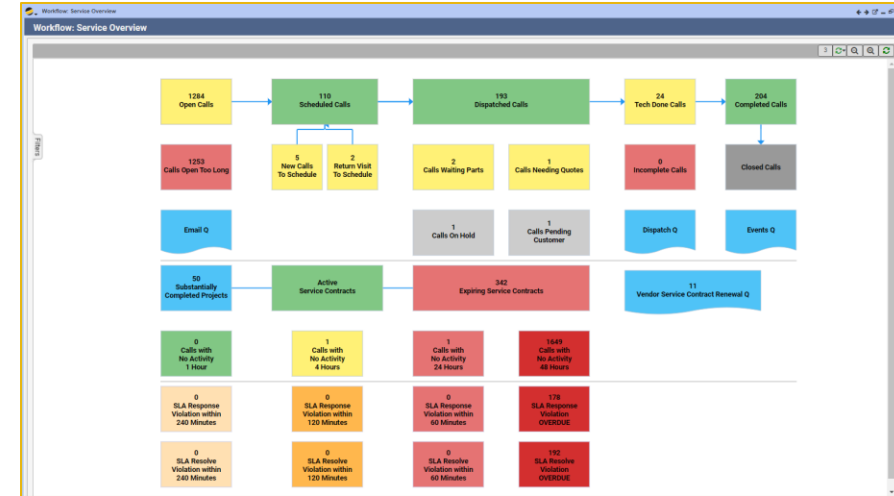
- Service Admin setup for Customer use
- Dashboards
  - Active Calls Dashboard
  - Recent Events Dashboard
- Customer-facing reports
  - Block Amount Summary / Detail
  - Monthly Call Activity
- Unpaid / Paid Invoices



Let's go to Q360...

# 6. Reports

- Service Overview Workflow Queues
  - Dispatch Queue
  - Event Queue
- Service Call Open / Closed Dashboards
- Service Contract Profitability
- Customer Call History
- Call Profit



LIVE DATA: Service Contract Profitability

#	Company	Serv Cont	Type	Number	Title	Revenue	Material Cost	Labor Cost	Misc Cost	Total Cost	Profit	Margin
1	Q Prebon Technology Instit...	200767	Srv Cont	200767	HARDWARE	\$2,096.8800	\$0.0000	\$0.0000	\$0.0000	\$0.0000	\$2,096.8800	100.00
2			Srv ContTotal			\$2,096.8800	\$0.0000	\$0.0000	\$0.0000	\$0.0000	\$2,096.8800	100.00
3		200767 Total				\$2,096.8800	\$0.0000	\$0.0000	\$0.0000	\$0.0000	\$2,096.8800	100.00
4	Q Prebon Technology Instit...	201171	Call	523688	SEASONAL	\$41,629.0000	\$0.0000	\$23,709.3900	\$0.0000	\$23,709.3900	\$17,919.6100	43.00
5			CallTotal			\$41,629.0000	\$0.0000	\$23,709.3900	\$0.0000	\$23,709.3900	\$17,919.6100	43.00
6		201171 Total				\$41,629.0000	\$0.0000	\$23,709.3900	\$0.0000	\$23,709.3900	\$17,919.6100	43.00
7	Q Prebon Technology Instit...	201210	Srv Cont	201210	WARRANTY	\$5,464.7000	\$0.0000	\$0.0000	\$0.0000	\$0.0000	\$5,464.7000	100.00
8			Srv ContTotal			\$5,464.7000	\$0.0000	\$0.0000	\$0.0000	\$0.0000	\$5,464.7000	100.00
9	Q Prebon Technology Instit...	201210	Call	521534		\$0.0000	\$0.0000	\$41.6600	\$5.0000	\$46.6600	\$-46.6600	0.00
10	Q Prebon Technology Instit...	201210	Call	522964		\$0.0000	\$0.0000	\$41.6600	\$5.0000	\$46.6600	\$-46.6600	0.00
11	Q Prebon Technology Instit...	201210	Call	525451	INSPECTION	\$0.0000	\$0.0000	\$41.6800	\$5.0000	\$46.6800	\$-46.6800	0.00
12			CallTotal			\$0.0000	\$0.0000	\$125.0000	\$15.0000	\$140.0000	\$-140.0000	0.00
13		201210 Total				\$5,464.7000	\$0.0000	\$125.0000	\$15.0000	\$140.0000	\$5,324.7000	97.00
14		Grand Total				\$49,190.5800	\$0.0000	\$23,834.3900	\$15.0000	\$23,849.3900	\$25,341.1900	52.00

# 7. Summary

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- Preparation breeds efficiency
- Call thoroughness creates credibility
- Recurring calls increase “stickiness”
- Holistic communication generates relationship and profitability
- Mature Service is a key piece of a virtuous Client / Revenue cycle

## 8. Q&A

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# Poll #4

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Would you like to be contacted regarding further training on **Service Management and Delivery** in Q360?

a. Yes

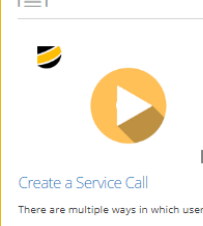
b. No

# 9. Wrap Up & References

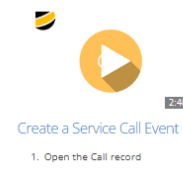
Q360 > Help > Contents



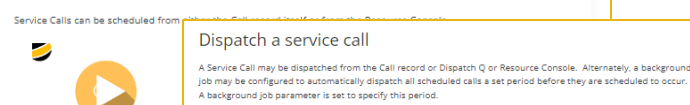
Create a service call



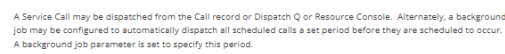
Create a service call event



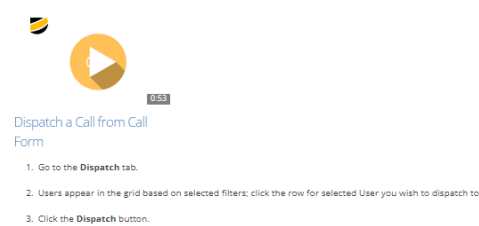
Schedule a service call



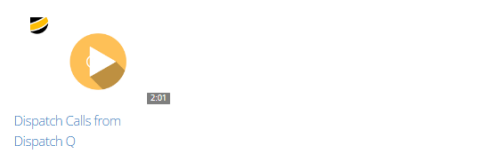
Dispatch a service call



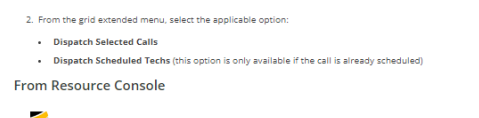
From a Service Call



From Dispatch Q



From Resource Console

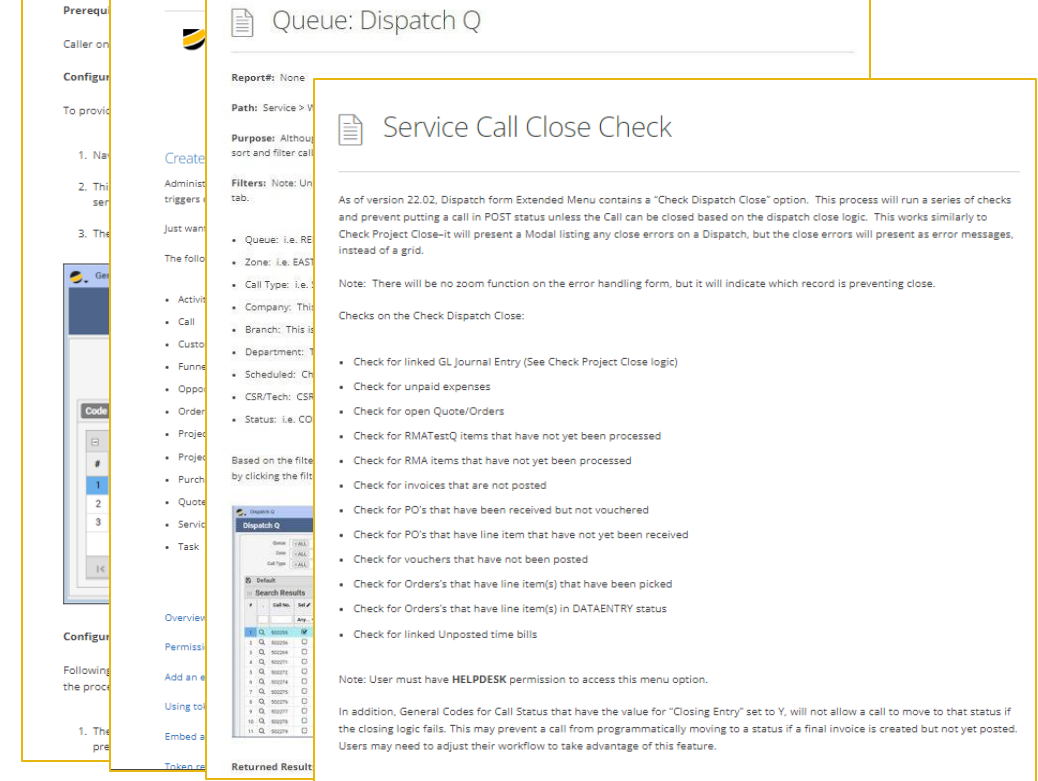


Request Service Dates

Email alert templates

Queue: Dispatch Q

Service Call Close Check



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# MASTER CLASS

*Thanks...*

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