

Chapter 10 - Service Agreements

Getting Started with Service Agreements

What is a Service Agreement?


A service agreement is an agreement sold to a customer that promising a number of visits to the residence to perform a service check-up for a nominal fee. For instance, you might agree to visit a customer's residence twice to perform a heating/cooling checkup. The agreement could include changing the furnace filter and checking the air conditioning system on each visit. The agreement should also include a discount on materials/labor or a preferred customer price on all work performed under the service agreement.

A lot of industry pundits agree that Service Agreements are a great way to expand your business and improve repeat business. Each visit is a sales opportunity for your business because the tech can usually find something that needs fixing, or the customer may have a "while you're here" extra for your business to perform. The discount given to the customer during the life of the service agreement will guarantee that the customer will call you for any additional work during that period. Service agreements also provide a way of helping to fill up the schedule during a slow period.

What is a Service Agreement in PricePoint?

PricePoint reminds users to contact the customer with **Visit Reminders**. Each visit reminder contains a number of actions that need to be performed by office staff. For example: office staff will need to contact the customer in order to make an appointment for the visit, and it might be necessary to send a postcard to the customer reminding them to contact your office. The final action that completes a reminder is actually making contact and scheduling a work order.

Creating a Service Agreement

Service agreements always begin with the invoice that was created when the customer was charged for the agreement. From the Main Menu, click **Retrieve Invoice**, click **Go to last invoice** and scan back until we find the invoice for the service agreement. On the Edit Invoice dialog, click  the Service Agreement button.

Create Service Agreement

Agreement Starts: 10/06/06 Customer #: 000004 Invoice #: 005562

James, Claudia
56 Meadowsweet Lane
Fairfax, CA 99123

Service Agreement Type
 Heating (selected)
 Heating & Cooling
 Water Heater
 Drain Cleaning
 Sewer Cleaning

Agreement Term
 1 Year
 2 Year
 3 Year
 4 Year
 5 Year

Visits per Year
 1
 2 First Visit
 3
 4 12/05/06

Reminder Actions
 Call Customer for Appt
 Send Postcard Reminder
 Made Appointment

Reminders and Actions will be previewed here

Service Agreement Notes

Preview Reminders/Actions Create Service Agreement Print Cancel

This dialog will allow us to set the agreement type, the term, visits per year, and the types of actions to include for each visit reminder. When you click **Create Service Agreement**, PricePoint will create the visit reminders and associated actions.

Service Agreement Types

Each service agreement has a type. Each type is linked to the text of the service agreement document that can be printed out when the agreement is created. To create the document text, we'll need to edit the service agreement type.

Creating Text Linked to Service Agreement Type

Click **Edit** in the Service Agreement Type area to display a full featured text editing tool.

Edit Service Agreement Type

Name of Type: Heating Save Cancel

Service Agreement body Service Agreement Heading

MS Sans Serif 8

Heating Service Agreement

We agree to provide a qualified Service Person to inspect your heating equipment. Services to be performed under this Agreement include one Equipment Tune up and one Equipment Cleaning per year.

Each Visit will include the following:

- Inspecting and cleaning heat exchanger and burners.
- Checking operating pressures and air flow.
- Testing safety controls.
- Lubricating parts as needed.
- Applying protective coat to equipment.
- Inspecting ignition and starting operations.
- Cleaning condensate drains.
- Checking all electrical connections.
- Adjusting blower components.
- Testing amperage and voltages of motors.

Line: 1 Col: 1

As with printing invoices and estimates, there is a heading tab that contains controls to customize the heading area that is printed above the text shown in the editor. For more about changing the heading see **Formatting Invoice and Estimate Printouts**. When you are finished creating the text for the Service Agreement Type, click **Save**. Then close the editor dialog.

Actions Associated with Visit Reminders

Each visit reminder has actions associated with it. The actions that are checked in the Reminder Actions area will be included for each visit reminder created for the service agreement. The order of the actions may be sorted and the order and the pattern checked may be saved.

Made Appointment, the Final Action

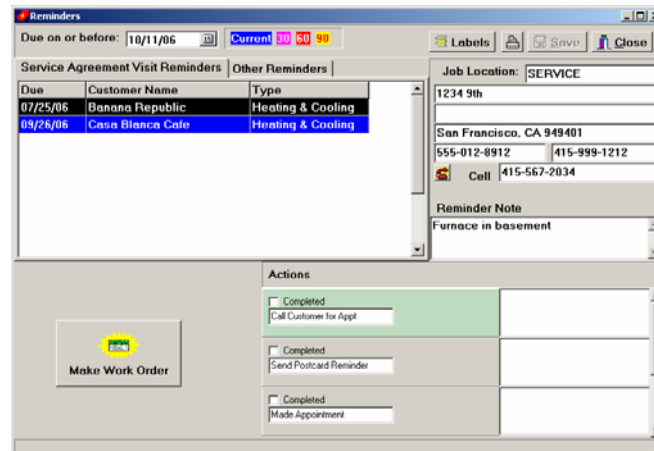
Each reminder should have the Made Appointment action. When this action is completed, the reminder is completed which clears it from the Reminders Due display.

Previewing Reminders and Actions

Clicking **Preview Reminders/Actions** will show the dates of each reminder and the actions associated with each reminder in the preview box. The date of the first visit reminder can be changed by changing the First Visit date. Once you are satisfied with the preview, check print if you need a printout of the service agreement and click **Create Service Agreement**.


Viewing and Completing Visit Reminders

From the Main Menu, Click the **Schedule** button. Then click the **Reminders** button.



The reminders will be visible in the schedule window as the reminders become due. In our example above, the first visit reminder will start to show in the schedule on or after 10/06/06. Notice that the color of the reminders in the grid relates to the age of the reminder. This will help users to identify reminders that need attention.

Printing a list of Reminders that are due

Click **Print Due Reminders**  to preview all due reminders in a text box. Click the **Print** button to print out the text.

Printing Labels for an Action (Print Postcards)

Click **Labels** to show the Print Labels dialog.

Choose an action (defaults to Send Postcard Reminder action). Click **Build List** to see the list in a grid. Click **Print Labels** to print out on Avery 5160 sheet labels.

Completing the action

All of the actions for which you just printed a label can now be completed by clicking **Complete Actions in List**.

Scheduling Work Order to Complete Reminder

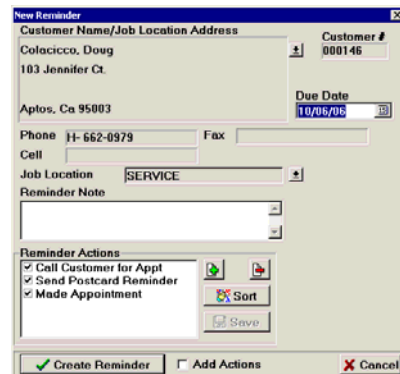
The idea is that the reminders will allow office staff to contact the customer and schedule a work order for the visit. Once you contact the customer to schedule a visit, Click **Make Work Order** to show the New Work Order screen with the customer information ready to go. Once the appointment is scheduled and the work order saved, the reminder will be completed and will no longer show in the Reminders dialog.

Other Reminders

Other Reminders are reminders that are not tied to a service agreement. These reminders must be linked to a customer and may be created for any reason whatsoever. Other reminders can have one or more actions associated with the reminder or none at all. Each reminder and action has a 100 character note.

Creating Other Reminders

Select the **Other Reminders** tab. Click **New Reminder**, and you'll be prompted to choose a customer. Select a customer and click **OK** to show the New Reminder dialog.



The screenshot shows a 'New Reminder' dialog box with the following details:

- Customer Name/Job Location Address:** Colacicco, Doug, 103 Jennifer Ct., Aptos, Ca 95003
- Customer #:** 000146
- Due Date:** 10/06/06
- Phone:** 662-0979
- Job Location:** SERVICE
- Reminder Actions:** Call Customer for Appt, Send Postcard Reminder, Made Appointment
- Buttons:** Sort, Save, Create Reminder, Add Actions, Cancel

Change the due date if necessary, add a reminder note, and check any actions you want associated with the reminder. Click **Create Reminder**.

Note: If you want the actions to be created, check **Add Actions**.

Deleting Other Reminders

Other reminders are not completed the way visit reminders are, they must be deleted. Select the appropriate reminder and click **Delete Reminder**. All actions linked to the reminder are automatically removed.

Editing Service Agreements

From the Main Menu, Click **Activities, Service Agreements, Edit Service Agreements**.

Comp	Service #	Agree Start	Agree End	Name	Type	Visits
<input type="checkbox"/>	000003	05/26/06	05/26/07	Banana Republic	Heating & Cooling	2
<input type="checkbox"/>	000004	07/28/06	07/28/07	Casa Blanca Cafe	Heating & Cooling	2
<input type="checkbox"/>	000005	08/17/06	08/17/07	Casa Blanca Cafe	Drain Cleaning	2
<input type="checkbox"/>	000006	08/17/06	08/17/07	Continental Glass	Heating & Cooling	2
<input checked="" type="checkbox"/>	000007	10/06/06	10/06/07	James, Claudia	Heating	2

Customer Details:
Claudia James 14th Street Townhouse
Claudia James
2094 14th Street
San Francisco, CA 11023
(415)729-1132
(415)912-3312

Job Location: 14TH STREET

Service Agreement Note: Be sure to take along a 24 x 36 pleated filter

Visit Reminders:
 Completed 11/05/06
 Completed 05/06/07

Actions:
 Completed Call Customer for Appt
 Completed Send Postcard Reminder
 Completed Made Appointment

Each service agreement is listed along with its reminders and actions. The complete display of each service agreement allows for the editing of all reminders and actions, not just reminders and actions that are due.

Reminder Date

The date of each reminder may be changed here.

Reminder and Action Note

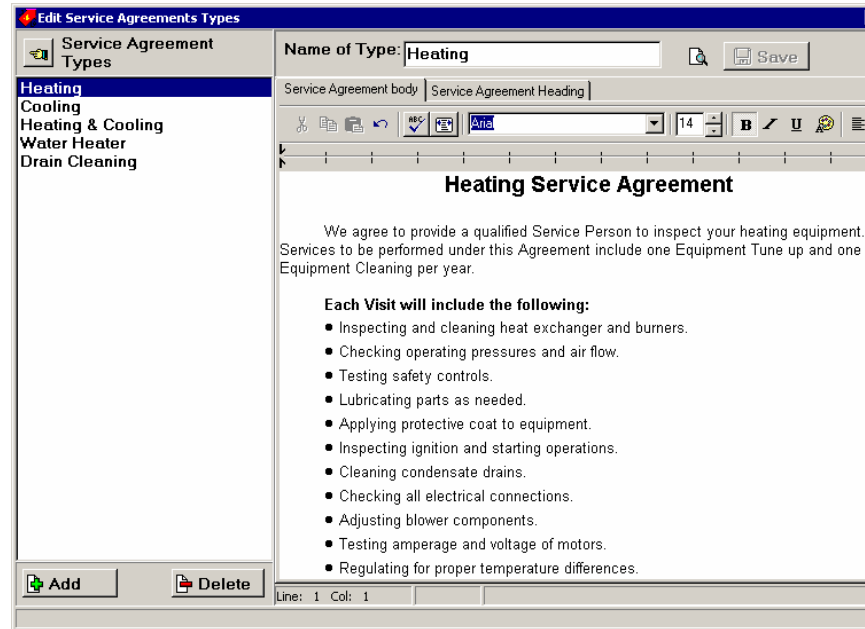
Each reminder and action has a 100 character note field so that a short notation may be added to each.

Purging Completed Reminders and Actions

When reminders and actions are completed, they are not automatically removed from the database. Click **Purge Completed** to permanently remove reminders and actions that have been completed.

Editing Service Agreement Types

Users can create or edit a service agreement type whenever they create a new service agreement as shown above, but often it is more convenient to explore and edit all of the types at once. From the Main Menu click **Activities, Service Agreements, Service Agreement Types**.



The names of the service agreement types are shown on the left side and the linked text is shown on the right side in a full featured text editing tool.

Adding a New Type

Add a new type by clicking **Add** and filling in a new name in the **Name of Type** edit box. Add the linked text for the new type and click **Save**.

Deleting a Type

Select a type in the list at left and click the **Delete** button.