

Course Outline:

Service Plans and Service Management

This webinar was created to introduce service plans and service management with 35-45 minutes of feature description and demonstration followed by a Q&A period.

Session Topics

- Service Overview
- Service Plans
- Service Plan Approval
- Service Orders

Notes

Service Overview

- **How can D-Tools help manage service?**
- **Create, Sell and Manage Service Plans**
 - **For New Projects/Customers**
 - **For Existing Projects/Customers**
- **Create and Manage Service Orders**
 - **As Part of a Service Plan**
 - **Standalone (with or without a project)**
- **Schedule Service Orders**
 - **Capture Service Request Needs**
 - **Assign Field Resources**
 - **Assign Date/Time**
 - **Collaborate using Mobile Install to complete work**

Notes

Service Plans

- Service Plans (SP) need a client and a name
- Service Plan Items determine the price & deliverables of a SP
- Project Items are from an associated Project
 - Can be considered “covered” under the SP
 - Can also be used to calculate values for a SP
- Introduction (optional) – Rich Text File to introduce services on SP reports
- Features (optional) – a bulleted list describing including SP benefits
- Terms (optional) - Rich Text File describing terms & conditions on SP reports

Notes

ACTIVITY 1

Create a Service Plan Item

1. Click Start → Service → Service Plans. The Service Plan Explorer opens.
2. Click on the Settings tab, then click Items. The Manage Service Plan Items window opens.
3. Click New. The New Service Plan Item window opens.
4. Type a Name for the Item.
5. Type a Description for the Item.
6. Choose a Frequency (One-Time, Monthly, Quarterly, Annually).
7. Set a Price. The default is Standard where you can type a value.
8. Or choose Calculated and click the Compute button.

Note: Calculations for Service Plan Items are based on values from associated Project Items.

9. Choose to set the Item as Taxable or not.
10. Click Save.

ACTIVITY 2

Create a Service Plan Feature

1. Click Start → Service → Service Plans. The Service Plan Explorer opens.
2. Click on the Settings tab, then click Features. The Manage Service Plan Features window opens.
3. Click New. The New Service Plan Feature window opens.
4. Type a Name for the Feature.
5. Type a Description for the Feature.
6. Click OK.

Notes

ACTIVITY 3

Create a Service Plan

1. Click Start → Service → Service Plans. The Service Plan Explorer opens.
2. On the Home tab, click New → New Service Plan. The New Service Plan window opens.
3. Select your Client from the dropdown menu. Optionally, select a Project associated with the Client.
4. Every Service Plan needs a name. Type something like 'Standard Service Plan', 'Extended Service Plan' or another descriptive name.
5. Type a description in the Description field. Keep it short.
6. Set a Plan Length in years and/or months or select 'Month to Month'.
7. To set a plan duration simply add a Start Date and the End Date will be calculated automatically.
8. To define a budget of Allowable Hours, enter a number of hours and set the budget as Monthly, Quarterly or Annually.
9. Select if the Service Plan should Auto Renew or not.
10. At this point you can save the Service Plan and then reopen to add more details. Click Save and Close. Then double-click the new Service Plan from your list.
11. On the Navigate section at the top of the window, click Service Plan Items.
12. Click Add. The Add Service Plan Items window opens.
13. Select one or more items from the list. Click Add and Close. The items will be added to the Service Plan.
14. If a Project is associated with the Service Plan, you can select Project Items (optional) to be included as 'covered' under the plan. Click Project Items.
15. Click Add Items. The Add Items From Project window opens. (Continued on next page)

Notes

- 16.** Select one or more items from the list. Click Add and Close. The items will be added to the Service Plan.
- 17.** Click Introduction (optional). Then click New to create a new Introduction RTF file (or click Attach if you already have some RTF files to choose from). A blank RTF document opens in your default RTF editor.
- 18.** Type an introduction to your service team, plan, process, etc. This text will be added towards the top of your Service Plan report.
- 19.** Click Features (optional). Click Add. The Add Service Plan Features window opens.
- 20.** Select one or more features from the list. Click Add and Close. The features will be added to the Service Plan.
- 21.** Click Terms (optional). Then click New to create a new Terms RTF file (or click Attach if you already have some RTF files to choose from). A blank RTF document opens in your default RTF editor.
- 22.** Type your Terms for the service plan (terms and conditions, exclusions, etc.) This text will be added towards the bottom of your Service Plan report.
- 23.** To run a Service Plan report click Reports. The default Service Plan report is listed. Choose Run and Close. The report will be run and displayed.

Notes

Service Plan Approval

- To show a Service Plan as active it must be approved
- The Service Plan will be locked against editing
- You will be prompted to fill in Plan Length and Start/End Date
- If the plan was not accepted, Mark as Rejected
- Now you can create Service Orders for the Approved Service Plan

ACTIVITY 4

Mark a Service Plan Approved

1. From the Service Plan Explorer, select the Service Plan.
2. In the Approval section, click 'Mark as Approved'.
3. Complete any required details for Start/End Date, duration, etc. Click Save and Close.
4. Click the 'Mark as Approved' button again. Your Service Plan is now Approved.

Notes

Service Orders

- **Service Orders allow you to schedule work to be completed for a service plan or standalone service request**
- **Products and Labor can be added directly from the Catalog**
- **The sum of the labor associated with the Labor Items creates a time budget**
- **One or more resources may be assigned to a service order**
- **A service order is scheduled on the calendar**
- **The total number of hours and the number of resources assigned can be used to determine a duration for the service order**
- **Service Orders can be issued as reports, sent via email, or published to Mobile Install**

Notes

ACTIVITY 5

Create and Schedule a Service Order (standalone)

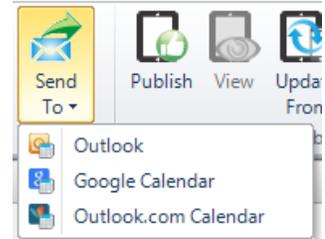
Service Orders only need a Client. However, if you are performing service on an existing SI project, pick the project as well.

1. Click Start → Service (or Schedule) → Manage Service Orders. The Service Order Explorer opens.
2. On the Home tab, click New. The New Service Order window opens.
3. Select your Client (and then your Project.)
4. Provide a name. Type something like 'Troubleshoot TV' or another descriptive name that will help identify the request.
5. Type a description in the Description field. Keep it short.
6. On the Navigate section at the top of the window, click Labor.
7. Click Add. The Add Labor window opens.
8. Scroll down and select Standard Service Call in the list. Click Add and Close. The labor item will be added to the Service Order.
9. Next click the Resources button. Click Assign. The Assign Resources window opens.
10. Choose a Resource from the list and click Assign. Notice the Estimated Hours for the Resource is set to 1.000. This is a default value.
11. In this case, you may want to simply type in a number of hours based on your estimate of the time needed to work through the Service Order.
12. Click General, then click on the Start Date. Pick a date on the calendar.
13. Next click Compute End. The Compute End Date dialog box will open.
14. Select the Estimated Resource Hours radio button. Click OK. (Continued on next page.)

Notes

- 15. Click Save and Close. Choose No when prompted to publish the task to Mobile Install.
- 16. Now your Service Order is scheduled but the Resource has not been notified. Select your Service Order from the list in the Service Order Explorer. Click Reports. Then under Standard Reports, double-click Service Order Detail. This is your Service Order. You can save the report as a PDF and email to the Resource.

- 17. If you use Outlook, Outlook.com or Google Calendar, you can click Send To and then pick one of those choices. Follow the prompts to send your Service Order.



Note: While a PDF Service Order Detail report will be added when working with Outlook, no report will be attached for Google or Outlook.com calendars.

- 18. Back in the Service Order Explorer, click Calendar. This will open the Calendar view and allow you to view Service Orders on a traditional calendar.

ACTIVITY 6

Create and Schedule a Service Order for a Service Plan

- 19. From the Service Plan Explorer, select a Service Plan.
- 20. On the Service Orders tab, click New. The New Service Order window opens.
- 21. Continue from Activity 5, step 3 above.

Notes

Training content complete

- Questions?

- Support Resources Available
 - D-Tools Application Home Page Links
 - [Documentation](#) – open the Support Wiki
 - [Support Ticket](#) – open the web page to create a support ticket
 - [Chat With Us](#) – Launches Chat Support
 - From any D-Tools software interface, click Learn More
 - Found in the upper-right corner
 - Launches the Support Wiki
 - Open the Support Wiki directly at support.d-tools.com
 - Send an email to support@d-toolshelp.com
 - Call 866.386.6571

Notes