



Service Management

The PCB X3 Service Management Module provides a powerful operational management tool to handle anything from a small number to large volumes of one-off or recurring service calls.

Service jobs are processed automatically through a predefined workflow process that ensures tracking and oversight.

The Service Management Module provides the following functions:

- Service Contract Maintenance
- Service Management Register
- Service Contract Renewals
- Service Contract Reviews
- Material and labour allocation to service job sales invoice

Service Contract Maintenance

PCB X3 generates a service contract from the underlying original quote and once activated the contract appears in the Service Management Register ready for job processing.

The Key Service Contract settings:

1. **Job Type** – choose one-off or recurring service job type
2. **Contract Status** – active or terminated
3. **Last Service Call** – date and by whom
4. **Next Service Call** – date
5. **Last Invoiced** – date
6. Required Skills & Expertise
7. **Contract Start & End Dates** – incl duration in months
8. **Billing Cycle** – the billing cycle also determines the service frequency

9. **Contract Renewal** – the contract renewal occurs either at contract end date or at the next billing cycle.

Key Service Contract features

- Job Menu for labour, material, payments, invoices and more
- Access to external job folder
- Access to client details including web-site and sending emails
- Access to site and external site folder
- Adding tasks and viewing the task list

Service Management Register

The PCB X3 Service Management Register is the main driver of the service jobs through the workflow.

The workflow of the service job is as follows:

1. **Awaiting service person allocation** – service jobs are listed for the current month. Batch allocating a serviceperson ensures the job is moved to the next level. View jobs in the months ahead
2. **Allocated service jobs** – batch notify the service persons of the allocated jobs – or fast track to invoice
3. **Notified service jobs** – serviceperson was notified, waiting for job start confirmation. Batch update to job started – or fast track to invoice
4. **Started service jobs** – waiting for job to be completed. Batch update to job completed – or fast track to invoice
5. **Completed service jobs** – jobs are ready to be invoiced

Key features of the Service Management Register

- View service jobs in calendar for better distribution overview
- Access to service contract and external job folder

- Add tasks and view tasks related to service job
- Search for service jobs with graphic display of workflow location
- Sort records by all available fields in any of the workflow screens
- Comprehensive screen tips and workflow assistance throughout
- Access to service job material, labour, payments and invoice transactions
- Print a batch report at each step through the workflow
- Graphical display including number of service job in each workflow segment on the main menu

Invoice Service Job

A service job can be invoiced by one of the following:

1. Create invoice based on underlying quote
2. Create invoice based on last invoice
3. Allocate material and labour
4. Enter line items manually

Inventory items can be allocated to an invoice

Service Contract Renewal

The PCB X3 Service Contract Renewal Manager consists of three predefined renewal workflow processes.

The Service Contract Renewal workflow processes are:

1. **Selection and Confirmation** – batch select and confirm that service contracts shown need renewing. Service contracts are shown one month ahead to ensure they are not processed in the Service Management Register! Confirmed service contracts move to the next workflow process
2. **Select and Sent Renewal Notices** – batch select service contracts and print renewal notices. Once printed they move to the next workflow process

3. **Awaiting Renewal Acceptance** – view all service contracts that are awaiting acceptance. Process the acceptance or take some other action.

Key features of the Service Contract Renewal Manager

- View current service contracts that need renewing or view months ahead
- For sending renewal notices view contracts grouped by renewal based on billing cycle or contract end date
- For sending renewal notices view contract renew date in calendar
- Messages to appear on renewal notice can be created in the PCB X3 library and reused
- Renewal notice provides access to client and site
- Awaiting acceptance displays notices sent by month/year and per client
- Track number of notices sent and add personal notes
- Add task to service job and view the task list
- Process acceptance or terminate or postpone the service contract renewal

Material and Labour allocation to Service Job Sales Invoice

PCB X3 PCB X3 automatically displays the rescheduling screen for service jobs that were invoiced – or in the event of one-off contracts notifies the user that the contract will be terminated.

Terminated contracts can be re-activated.

Once the sales invoice of a service contract is saved, the Material and Labour Allocation screen appears.

Service jobs are reused (other than one-off) over and over and the gross profit is calculated per service invoice.

The Material and Labour Allocation screen provides the following functions:

1. Create material purchase invoices
2. Create labour transactions and determine pay method
3. Labour pay method can be standard hours * rates, day rates, job rates or profit sharing
4. Recalculate pay rates for all labour allocated to sales invoice in the event of profit sharing
5. Automatically calculate sales invoice gross profit
6. Update sales invoice

Key features of the Material and Labour allocation to Service Job Sales Invoice

- Find sales invoice and process either service jobs or project sales invoices
- System notifies user if un-allocated material or labour transactions exist before a new transaction is created
- Access to underlying material or labour transactions
- Remove a material or labour transaction from a sales invoice and recalculate gross profit
- Easy access to all sales invoices **without** material or labour allocations
- Easy access to all sales invoices **with** material or labour allocations