



# CUSTOMER SUCCESS **SUMMIT** 2024



# Advanced Service

## *Overview*

1. Enhances SAP's Service Module
2. Schedule, Dispatch, and Report on key metrics
3. Internally integrate Service process to Sales process

# Service Call

1. Call is scheduled for the customer and relevant information is added
2. Links to Service History, Linked Service Calls, and Linked Documents

Work Order



Contract # → 235357  
 Customer Name → Mr. Test  
 Contact Person → TENANT  
 Telephone No. → 555-555-5555  
 E-Mail → brayton@ecs-online.com

Address  
 Mr. Test ▼ 123 Main St  
 APT 101  
 Atlantis, FL 12345

Edit Dispatch Flash  
 closed 11/28 Thursday Thanksgiving.

Dispatch Flash  
 Building Name

Service Code → EPL  
 Service Description → EXTENDED PLUMBING  
 Serial No. →  
 Eq. Card → EPL-235357

Coverage  
 A/C BXF COM CRB D/W DRO EEL  
 EPF EPL GSK HTG I/M IWD MWO  
 O/R PMC R/H REF SCO T/H

C.O.D. Parts 0.00

Created By ECS

Link ID 76191  
 WO No. Primary 4112224  
 Call Status Open  
 Call ID 533112  
 Service Status Call is Dispatched  
 Ref No.

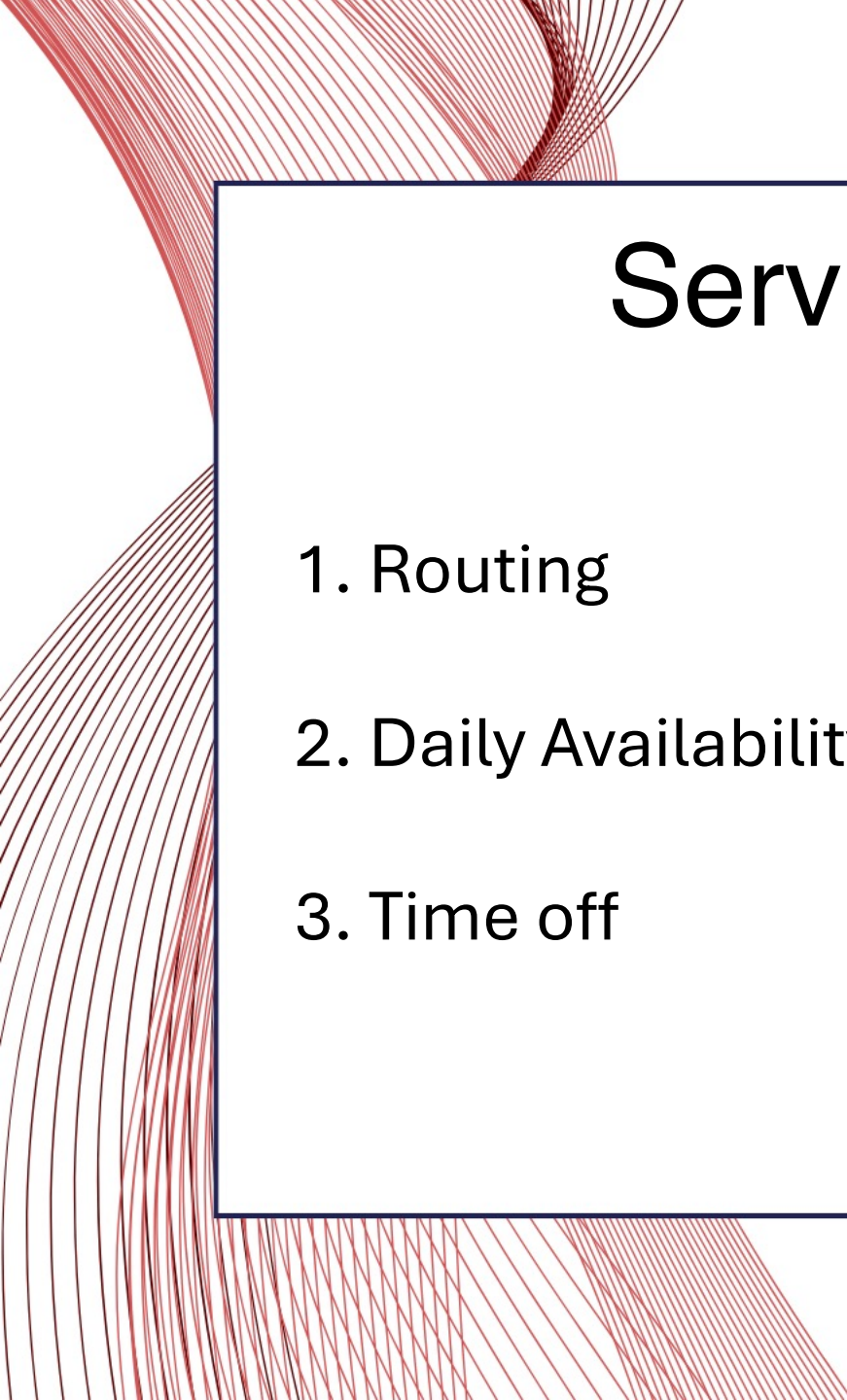
Created On 10/14/24 9:48AM  
 Closed On  
 Service Contract No. → 47528  
 08/07/24 to 08/07/25  
 Dev-Bld → D5-1

Problem \*\*BSD 1ST CALL\*\*Install: PIP-055 - 1/2 X 3/8 ANGLE STOP, TOI-001 - SWAN THIN WAX RING, TOI-002 - WAX RING W/FLANGE\*\*OK P/M5\*\*

- General
- Scheduling
- Remarks
- Resolution
- Service History (11)
- List of Customers Equipment (21)
- Linked Service Calls (2)
- Linked Documents (3)
- Attachments

#	Technician	Service Window	Start Date	Start Time	End Date	End Time	Duration	Duration Type	Actual Duration Type	Actual Duration	Location	Address	Address Description	Reminder	Reminder-time	Reminder Type	Display In Calendar	Tech...
1	Manager, Manager	First Call	10/17/24	9:45AM	10/17/24	10:00AM	15.0000	Minutes	Minutes	0.0000				<input type="checkbox"/>	0.000	Minutes	<input checked="" type="checkbox"/>	4

Add Tech  
 OK Cancel Add Another Service Issue Add Equipment Parts Billing Add Return Visit Schedule History



# Service Call - Scheduling

1. Routing
2. Daily Availability
3. Time off



Work Order

Contract #   
 Customer Name   
 Contact Person   
 Telephone No.   
 E-Mail

Service Code   
 Service Description   
 Serial No.   
 Eq. Card

Address  123 Main St  
 APT 101  
 Atlantis, FL 12345  
 Coverage  
 A/C BXF COM CRB D/W DRO EEL  
 EPF EPL GSK HTG I/M IWD MWO  
 O/R PMC R/H REF SCO T/H  
 C.O.D. Parts

Edit Dispatch Flash  
 Dispatch Flash   
 Building Name   
 Created By

Link ID   
 WO No.   
 Call Status   
 Call ID   
 Service Status   
 Ref No.   
 Created On    
 Closed On   
 Service Contract No.   
 to   
 Dev-Bld   
 Contract Special Inst.

Problem

- General
- Scheduling
- Remarks
- Resolution
- Service History (11)
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- Linked Service Calls (2)
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Date	Service Window	Service Code	Description	Problem	Resolution	Status	Technician	W/O #
10/17/24	AM	D/W	DISHWASHER	NOT WOTKING AT ALL		88		4112236
10/17/24	First Call	EPL	EXTENDED PLUMBING	**BSD 1ST CALL**Install: PIP-055 - 1/2 X 3/8 ANGLE STOP, TOI-		88		4112224
10/17/24	AM	A/C	CENTRAL A/C UP TO 5 TONS	NOT COOLING		88		4112238
09/18/24	AM	EPL	EXTENDED PLUMBING	1 hr cb4 MSTR TLT LEAKING TO APT BELOW AND KTCHN SINK L	BSD REQUIRE NEEDED FOR PIP055,TOI001,TOI002 FOR MB TLT WCB MARY	87		4103919
09/09/24	PM	EPL	EXTENDED PLUMBING	KTCHN SINK LEAKING UNDERNEATH	tighten ptrap & needs disposal gasket	93		4102562
08/05/24	PM	A/C	CENTRAL A/C UP TO 5 TONS	LEAKING TO APT BELOW	spk w/mr @320 canceled appt	94		4091864
08/01/24	AM	A/C	CENTRAL A/C UP TO 5 TONS	LKNG	flusehed drn line	98		4091855
07/22/24	AM	DRO	DISPOSAL REPAIR ONLY	NSTL DIS-002 \$160.49	INSTALLED 1/2HP DISPOSAL APO#062137 MARY /HOME/SPK W/MS#20 @84	81		4085403
06/06/24	PM	PMC	PREVENTATIVE MAINT CLEAN	DO	98 DID PMC	98		4075138
06/04/24	PM	EPL	EXTENDED PLUMBING	KIT SINK CLOGGED MSTR SINK FCT HNDL BROKE	NEED 1/2HP DISPOSAL COD\$149.99, P TRAP WITH EXTENSION IN KITCHEN S	93		4075135
02/19/24	AM	A/C	CENTRAL A/C UP TO 5 TONS	NOT COOLING (STBY)	reset unit	98		4045703

Work Order

Search For Customers

Contract # → 235357

Customer Name → Mr. Test

Contact Person → TENANT

Telephone No. → 555-555-5555

E-Mail → brayton@ecs-online.com

Address

Mr. Test

123 Main St  
APT 101  
Atlantis, FL 12345

Edit Dispatch Flash

closed 11/28 Thursday Thanksgiving.

Dispatch Flash

Building Name

Service Code → EPL

Service Description → EXTENDED PLUMBING

Serial No. →

Eq. Card → EPL-235357

Coverage

A/C BXF COM CRB D/W DRO EEL  
EPF EPL GSK HTG I/M IWD MWO  
O/R PMC R/H REF SCO T/H

C.O.D. Parts → 0.00

Created By → ECS

Link ID → 76191

WO No. Primary → 4112224

Call Status → Open

Call ID → 533112

Service Status → Call is Dispatched

Ref No. →

Created On → 10/14/24 9:48AM

Closed On →

Service Contract No. → 47528

08/07/24 to 08/07/25

Dev-Bld → D5-1

Problem → \*\*BSD 1ST CALL\*\*Install: PIP-055 - 1/2 X 3/8 ANGLE STOP, TOI-001 - SWAN THIN WAX RING, TOI-002 - WAX RING W/FLANGE\*\*OK P/MS\*\*

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Document	DocDate	Document #	Item	Description	Quantity	LineTotal	Cost
Sales Order	10/14/24	→ 232192	→ PIP-055	→ 1/2" X 3/8" ANGLE STOP	1.000	0.00	6.52
Sales Order	10/14/24	→ 232192	→ TOI-001	→ SWAN THIN WAX RING	1.000	0.00	1.00
Sales Order	10/14/24	→ 232192	→ TOI-002	→ WAX RING W/FLANGE	1.000	0.00	1.27
							8.79

# Dispatch, Track, Update, Close

1. The Dispatch Board allows you to view and update calls filtered by Tech and Date
2. The Parts Follow-Up Board allows you to track outstanding parts orders, and schedule a follow-up with the customer when that part comes in



Parts Follow-Up Scheduling Board

Search line  Search

Select	Status	Sales Order	Contract #	Name	Remarks	Resolution	Technician	Install Date	Service Window	Follow Up Date	Work Order #	Service Code	Call ID	LinkID	ChannBP	DocDate
1	Not Scheduled	221053	276501		10/04 7TH ATTEMPT & FINAL: 07/10/11 3RD & FINAL BY 10/18-EMAI	TECH# 27: CUST AWARE \$125HR PRTS I#15637; CANCEL. PART ON B/O UNTIL JANUARY 2024	Select Technician	11/27/23	PM	10/04/24	3308743	WAS	156172		COD	11/27/23
2	Not Scheduled	219706	277917			93 8"BURNER--W1330X348 6"BURNER--WB30X	Select Technician	10/17/23	AM	10/11/24	4009181	REF	219663	406	COD	10/17/23
3	Waiting	224932	181781			93 HINGE--WR2X4901 / WR13X10020	Select Technician	03/04/24	AM	03/04/24	4020956	O/R	255773	16102	D373-1	03/04/24
4	Waiting	226458	98219			COUNTERWEIGHT SPRINGS AND SUSPENSION	Select Technician	04/12/24	Special	04/12/24	4023897	SXS	264339	18194	D373-4	04/12/24
5	Waiting	229789	271271			rang bake element p#9755770	Select Technician	07/25/24	AM	07/25/24	4027336	WDF	274950	20777	D348-7	07/25/24
6	Not Scheduled	229794	241687		10/03 LM & TEXED 3rd & FINAL BY 3RD & FINAL BY 10/11 LM+TEXT;	93 looking up parts reservoir 00672953 htr 006825	Select Technician	07/25/24	AM	10/03/24	4027858	O/R	276529	21146	D348-6	07/25/24
7	Not Scheduled	226983	150121			43 INSTALLED PARTS 43--DISP. DOOR--WR:	Select Technician	04/30/24	PM	10/03/24	4036841	IWD	303858	27741	D65-2	04/30/24
8	Waiting	231479	277944			93 BOTTOM FELT--WE09X10014	Select Technician	09/18/24	PM	09/18/24	4042472	IWD	321446	6015	D1427-1	09/18/24
9	Waiting	231648	235116			SEAL REAR CRISPER/P#1302100(3)	Select Technician	09/24/24	PM	09/24/24	4042629	DRY	321815	31733	D1461-1	09/24/24
10	Waiting	228402	250283			pump motor side winden motor p#wd26x10013 n	Select Technician	06/14/24	PM	06/14/24	4044566	SZR	327744	33089	D1343-2	06/14/24
11	Waiting	231641	276047			neede ref door busing and washer p#5304507146	Select Technician	09/24/24	AM	09/24/24	4050587	D/W	345877	37322	D348-5	09/24/24
12	Waiting	231640	259455				Select Technician	09/24/24		09/24/24	4054684	REF	357903	36900	D348-11	09/24/24
13	Scheduled	224895	96508			93 LIGHT SWITCH--W11396033 TURNED	Select Technician	12/02/24	PM	03/04/24	4058966	WHT	370947	28924	D111-2	03/04/24
14	Waiting	231642	264032				Select Technician	09/24/24	PM	09/24/24	4060534	AIM	375969	44507	D459-1	09/24/24
15	Reschedule	226084	267466				Select Technician	10/16/24	First Call	04/03/24	4061241	SZR	378475	766	D1641-1	04/03/24
16	Reschedule	226608	270418		09/11 W/C/B 2ND ATTEMPT	87 PER TECH, CUST DIDN'T MAKE APPT AND IS	Select Technician	04/17/24	First Call	09/11/24	4061730	REF	379946	45147	D1382-1	04/17/24
17	Waiting	231643	274970			FRESH SIDE SENSOR P#5303918775	Select Technician	09/24/24	AM	09/24/24	4062838	REF	383247	46126	D348-2	09/24/24
18	Scheduled	225124	263037				Select Technician	12/19/24	AM	04/07/24	4062864	D/W	383349	28238	D1434-1	03/08/24
19	Scheduled	226578	206149				Select Technician	11/19/24	AM	04/16/24	4064069	O/R	387534	19639	D598-1	04/16/24
20	Reschedule	226057	243422		05/19 PARTS ON JOB, CST WONT	CST WILL HAVE 2 REMOVE TILES NO ACCESS	Select Technician	04/29/24	PM	11/01/24	4064559	D/W	388767	22138	D348-10	04/02/24
21	Waiting	231493	300358			93 DRUM WHEEL--W10314173	Select Technician	09/18/24	PM	09/18/24	4065861	DRY	393402	48317	D180-4	09/18/24
22	Waiting	231492	247229			93 BAKE ELEMENT--WB44K5012	Select Technician	10/10/24	AM	10/08/24	4065870	O/R	393434	48322	D745-1	09/18/24
23	Waiting	231647	301047			93 LID SWITCH--WH12X395 2 SCREWS--WH	Select Technician	09/24/24	PM	09/24/24	4066357	WAS	394852	48706	D2862-1	09/24/24
24	Reschedule	225215	300627		"TRUE COD" 03/15 W/C/B	RETURN PARTS	Select Technician	05/05/24	Special	03/15/24	4067891	REF	399557	20612	COD	03/12/24
25	Scheduled	227003	232850				Select Technician	12/30/24	First Call	04/30/24	4068775	MWO	402304	35299	D65-2	04/30/24
26	Scheduled	227167	59987				Select Technician	11/18/24	First Call	05/06/24	4068916	REF	402811	39920	D500-1	05/06/24
27	Waiting	231496	206698			WATER VALVE P#WPW10279909	Select Technician	09/18/24	AM	09/18/24	4070694	AIM	408288	51951	D348-4	09/18/24
28	Reschedule	227219	127604				Select Technician	10/21/24	AM	05/07/24	4070828	WAS	408721	48748	D314-1	05/07/24
29	Reschedule	226461	215032		09/11 LM & TEXTED	97 LMVM 10:55 SEC. LORA JB	Select Technician	06/20/24	AM	09/11/24	4072140	D/W	412803	16290	D373-5	04/12/24
30	Reschedule	227298	244381				Select Technician	10/17/24	First Call	05/09/24	4072284	AIM	413223	40834	D783-5	05/09/24

Close Schedule Technicians Update Remarks/Follow Up Date

Refresh

# Service Reporting

1. All Service Data lives in SAP so we can easily report on it

Examples: Service Calls by Status, Number of Service Calls by Item/Service Code (down to the serial number), Service Profitability

	Service Code	Coverage	# of Contracts	# of Calls	Old Price	New Price	Old Contract Revenue	New Contract Revenue	Revenue Increase	Cost
1	A/C	B	239	442	279.00	279.00	66,681.00	66,681.00	0.00	-46,184.58
2	EPL	B	237	173	0.00	0.00	0.00	0.00	0.00	-18,076.77
3	EPE	NEW	0	88	0.00	0.00	0.00	0.00	0.00	-9,195.12
4	REF	B	239	73	20.00	20.00	4,780.00	4,780.00	0.00	-7,627.77
5	WDC	B	231	67	0.00	0.00	0.00	0.00	0.00	-7,000.83
6	EEL	B	237	66	0.00	0.00	0.00	0.00	0.00	-6,896.34
7	D/W	B	239	59	0.00	0.00	0.00	0.00	0.00	-6,164.91
8	O/R	B	239	48	20.00	20.00	4,780.00	4,780.00	0.00	-5,015.52
9	DIR	B	239	36	0.00	0.00	0.00	0.00	0.00	-3,761.64
10	BLB	B	239	35	5.00	5.00	1,195.00	1,195.00	0.00	-3,657.15
11	WHT	B	239	35	0.00	0.00	0.00	0.00	0.00	-3,657.15
12	P&E	NEW	2	33	0.00	0.00	0.00	0.00	0.00	-3,448.17
13	AIM	B	239	22	5.00	5.00	1,195.00	1,195.00	0.00	-2,298.78
14	ACR	O	153	20	170.00	0.00	26,010.00	0.00	-26,010.00	-2,089.80
15	BXF	B	239	16	0.00	0.00	0.00	0.00	0.00	-1,671.84
16	MWO	B	232	10	0.00	0.00	0.00	0.00	0.00	-1,044.90
17	TWH	O	57	9	0.00	0.00	0.00	0.00	0.00	-940.41
18	COM	NEW	0	8	0.00	0.00	0.00	0.00	0.00	-835.92
19	PMC	O	19	5	35.00	99.00	665.00	1,881.00	1,216.00	-522.45
20	CRB	B	239	3	0.00	0.00	0.00	0.00	0.00	-313.47
21	IWD	B	233	3	0.00	0.00	0.00	0.00	0.00	-313.47
22	T/H	B	239	3	0.00	0.00	0.00	0.00	0.00	-313.47
23	DRY	NEW	0	2	0.00	0.00	0.00	0.00	0.00	-208.98
24	COR	B	239	2	0.00	0.00	0.00	0.00	0.00	-208.98
25	2PM	O	4	1	150.00	0.00	600.00	0.00	-600.00	-104.49
26	REG	B	239	1	7.00	7.00	1,673.00	1,673.00	0.00	-104.49
27	WHP	NEW	0	1	0.00	0.00	0.00	0.00	0.00	-104.49
28	CCL	B	239	1	7.00	7.00	1,673.00	1,673.00	0.00	-104.49
29	P&F	B	239	1	0.00	0.00	0.00	0.00	0.00	-104.49
30	EXF	B	239	1	0.00	0.00	0.00	0.00	0.00	-104.49
				1,264	882.58	984.00	118,965.00	94,051.00	-24,914.00	-132,075.36



Call Status Report: 98 - Completed Job



	Select	Work Order	Tech #	Tech	Date	Service Window	Return Visit	Service Code	Problem	Resolution
1	<input type="checkbox"/>	➔ 4112121	1030		10/14/24	Special ▼		A/C	PASSED INSPECTION ON 09-25-24 FOR A/C - (08/23/19 TCV030AGC30CRTS) PERMIT MAIR-16-00180	PERMIT MAIR-16-00180
2	<input type="checkbox"/>	➔ 4111311	116		10/14/24	Special ▼		EPL	SCHEDULE FLAMENCO URINAL REPAIR	SCHEDULED JOB FOR 10/14
3	<input type="checkbox"/>	➔ 4105917	123		10/14/24	AM ▼		D/W	INSTALL - DOOR GASKET/#WD08X10057,#WD8228,#WD8X227	INSTALLED - DOOR GASKET/#WD08X10057,#WD8228,#WD8X227
4	<input type="checkbox"/>	➔ 4109684	149		10/14/24	First Call ▼		EPL	inst cust gb fct condmned 35.00 hardware	install cust supply fct gb
5	<input type="checkbox"/>	➔ 4111044	154		10/14/24	AM ▼		D/W	NT TURNING ON	reset d/w
6	<input type="checkbox"/>	➔ 4111046	154		10/14/24	AM ▼		O/R	FRT PART BROKEN	reinstall front panel
7	<input type="checkbox"/>	➔ 4111994	168		10/14/24	First Call ▼		A/C	a/c upstairs no cool	TCH FLUSHED DR LINE TD 20 150/305PSI 410A SYS UNIT IS COOLING
8	<input type="checkbox"/>	➔ 4111880	172		10/14/24	AM ▼		A/C	IS NOT COOLING	FLUSHED DRAIN LINE CR SPK W/ MS @834AM HOME
9	<input type="checkbox"/>	➔ 4111728	187		10/14/24	First Call ▼		A/C	LEAKING WATER	TCH FLUSHED/RESET DR LINE
10	<input type="checkbox"/>	➔ 4111338	189		10/14/24	AM ▼		A/C	not cooling	TCH RESET TST
11	<input type="checkbox"/>	➔ 4111648	190		10/14/24	AM ▼		A/C	NOT BLOWING ANY AIR	REPAIRED FLOAT SWITCH, NO ACCESS TO ROOF TO CHECK PRESSURES. BUT I
12	<input type="checkbox"/>	➔ 4111742	23		10/14/24	First Call ▼		A/C	NT COOLING	replace dual cap
13	<input type="checkbox"/>	➔ 4107551	26		10/14/24	First Call ▼		D/W	NSTL P#154637401 VALVE	98 INSTALLED PART
14	<input type="checkbox"/>	➔ 4107807	26		10/14/24	AM ▼		REF	INSTALL DAMPER--WPW10196393 THERMISTOR--12002355 GRILL--13024803	98 INSTALLED PARTS
15	<input type="checkbox"/>	➔ 4107193	27		10/14/24	AM ▼		2PM	DO PREVENT AC MAINT	98 DID PMC
16	<input type="checkbox"/>	➔ 4111737	27		10/14/24	First Call ▼		EEL	MBDRM OUTLET NO POWER	98 INSTALLED SWITCH--ELE 2A T/S
17	<input type="checkbox"/>	➔ 4111782	32		10/14/24	AM ▼		EPL	WATER SPRAYER IN KITCHEN LOW WATER PRESSURE	SEALED AROUND GST TLT & REMOVED WATER SAVER FOR KITCHEN FCT
18	<input type="checkbox"/>	➔ 4111830	32		10/14/24	First Call ▼		SPL	INSTALL CUST SUPPLY TOILET. MAKE BILL PER BOB JR.	INSTALLED CUST SUPPLIED TOILET, TI001, TOI002-INV#164118
19	<input type="checkbox"/>	➔ 4109430	42		10/14/24	AM ▼		D/W	INSTALL CUST SUPPLY WATER INTAKE VLV/P#154637401	98 INSTALLED CUST. SUPPLIED VALVE
20	<input type="checkbox"/>	➔ 4111619	83		10/14/24	AM ▼		SPL	SNAKE WASHER DRAIN LINE 2 MAN W/72	K37 WASHING MACHINE LINE MARY HOME/MS#61 @858A MS

Close

Schedule Return Visit

Refresh

# Advanced Services Advantages

1. Visibility. Data lives in one place. No integration to separate databases. One source of truth.
2. Customizable to fit your needs. (Service Codes or Serialized Equipment)
3. Traceability. Sales > Service > Parts > Invoicing