MAXIMIZE EFFICIENCY & DELIGHT CUSTOMERS
With The Worlds Most Powerful Service Supply Chain Management System

New User Training
Presented to New Service Providers

Version 1.0
June 7, 2013
Objectives

• **After today’s training you will have:**
  - A general understanding of the ServiceBench application as well as how to more effectively search, navigate, and use the system. This includes items such as:
    - Product overview and how ServiceBench fits into the entire service ecosystem
    - Definition of the key roles of “Service Administrator” and “Service Provider”
    - User Interface, standards, and navigation
    - Reporting
    - Where to obtain more information and training
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ServiceBench Overview

• **What is ServiceBench?**
  - The world’s most powerful integrated service management system
    • ServiceBench integrates service industry partners via the internet

• **Manufacturers & Retailers (Service Administrators) can use one tool to:**
  - Configure their unique network of parts, suppliers, distributors and Service Providers
  - Maintain relationships with preferred Service Providers

• **Service Providers can use ServiceBench to:**
  - Receive jobs from multiple Service Administrators across the entire network
  - Manage Service Area Information
  - Utilize immediate adjudication rules to submit claims and get paid faster
ServiceBench Overview

What are the ServiceBench main modules?

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Analytics

Service Management

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Service Administrators

Service Management
ServiceBench Overview

What are some of the key features?

Product Features

Modular, configurable and lighting fast

**Job Intake and Scheduling**
A single point of contact receives customer repair requests and tracks service to completion.

**Job Distribution**
Repair jobs, depot work, and installs are instantly dispatched to service providers.

**Service Management**
Exceptional customer service is ensured by real-time network and performance measurement.

**Parts Management**
Service Providers can order parts from multiple suppliers from one powerful application.

**Claims Management**
Claims are instantly validated and processed.

**Reporting and Analytics**
Powerful business intelligence and network operations data help you manage your business.

**Mobile**
The ServiceBench mobile app creates a robust connection between field techs and service operations.

**Flexible Integration Options**
Standardized APIs and Web services let you use ServiceBench features directly or to power other platforms.
ServiceBench Overview

Terminology:

• Administrator
  - A person who has authority to use the ServiceBench user administration, system management and control functions.

• Service Administrator
  - Manufacturer, Retailer or Third Party who uses ServiceBench to route field service technician for repairs and installations.

• Service Provider
  - A Company that provides repair, installation or other services on behalf of the Service Administrators.

• Service Order
  - A ServiceBench customer record that tracks an incident needing service. Service Orders can contain one or more Job(s).

• Service Job(s) (formerly Dispatch)
  - Service Job is a scheduled repair or installation appointment. A Service Job may be referred to as ‘Job(s)’
ServiceBench Overview

Terminology:

• **ServiceBench ID**
  - A ServiceBench assigned unique number that identifies a Service Provider.

• **Technician ID**
  - A unique ID used by ServiceBench to identify a technician.

• **Account Number**
  - ID number from Service Administrator's system that refers to the Service Provider.

• **Reference Number**
  - Numeric identifier that the Service Provider can assign to the claim. Reference numbers must be unique.

• **Entitlement**
  - The process of verifying whether or not the unit is eligible for service under warranty.

• **ServiceBench Maintenance Screens**
  - Service Administrators and Service Providers use these screens to set up and configure their usage of ServiceBench. Service Provider Information, Service Coverage, Brands, Product Lines, and Programs are examples of items that need to be configured/setup.
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Technology Overview

1. ServiceBench Overview
2. Technology Overview
3. Logging On, Users & Security
4. Main Menu, Mega Menus & Navigation
5. Landing Pages & Dashboards
6. Reporting & Analytics
Technology Overview

- **ServiceBench** is the premier Service Community for Major Appliances (MA), Consumer Electronics (CE), Heating, Ventilation, and Air Conditioning (HVAC) and others...

- Majority of leading Original Equipment Manufacturer’s (OEM’s) and Retailers; 150k+ Service Providers, Installers, Depots; 15+ Leading Parts Distributors

- Executing globally at scale:
  - 1.8M transactions daily @ 0.7 seconds per
  - Determine payee on 20 million jobs annually
  - 5.5+ Million Dispatches annually
  - 10 Million ($1.1B) claims processed annually
  - Claims and Service Jobs from every country in world - 9 Languages
  - 100M+ product registrations

- Operating in “the Cloud” for 15+ years:
  - World Class Data Center / Client Driven SLA’s
  - SAS70, PCI compliant, redundant
  - 24x7 secure, monitoring, fire suppression
  - Latest server technology and Oracle DB
  - Virtualized server / disk farms for scalability
  - 40+ support personnel – DBAs, network, OS..
  - 70%+ open capacity for growth
Q: Which browsers are supported?

A: Internet Explorer 7 or higher, Firefox 11 or higher, Safari 5.1 or higher, Chrome 21 or higher. If you are having trouble viewing the site, you may have to upgrade your web browser.

- In order to update your browser you must go to the appropriate software vendor’s page and download the latest version. Please follow their instructions or contact them for assistance.
- Below are links for the most common browsers:

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Logging On, Users & Security
Logging on as a Service Provider

• When a Service Provider logs onto ServiceBench for the first time they use their ServiceBench ID (created when a Service Administrator set you up as a new Service Provider in ServiceBench)

• The User ID that was assigned when you were provided your login credentials

• The password will be unique and case sensitive
Forgot My Password

• If you ever forget your password select the Forgot My Password link to have it emailed to you
  - You must have a valid email address set up in the application for the Forgot Password feature to work

• You only have 3 chances to log on

• After the third unsuccessful attempt your account is disabled and must contact Product Support to have it re-enabled
The first user (user id ‘user’) to log on ServiceBench is considered the Company Administrator and has full access to and control of all ServiceBench functionality.

- Tasks of the Company Administrator are to create User Access Profiles, create users, provide users with their User ID and initial Password, as well as reset passwords and disabled users.

- All users are required to create a new password after their first login.
New User Information

As a new user you must confirm your information is accurate, make any necessary corrections, and be sure to populate all required fields which are indicated by an asterisk (*).

Although E-Mail Address is not required it is an important way for us to contact you and provide support. If you do not enter an email address, you will get a confirmation message when clicking the Continue button.

Click the Continue button.
End-User Agreement

• Read the End User Agreement
• Click the I AGREE button to continue and use ServiceBench
• Click the I DISAGREE-EXIT button and you will be logged off ServiceBench

NEW USERS

Before using this system, all users must agree to the following end-user agreement.

Last updated on May 13, 2011.

PLEASE READ CAREFULLY!

BY USING THIS SITE, YOU AGREE TO BE BOUND BY THESE TERMS OF USE.

These terms of use (Terms of Use) are for the N.E.W. Customer Service Companies, LLC (N.E.W.) online website located at www.servicebench.com (the Site). By using this Site, you agree to be bound by the terms and conditions set forth in these Terms of Use. If you do not agree to these Terms of Use, you may not use this Site.

I AGREE  I DISAGREE - EXIT
Changing Your Password

• New users first sign on with the password assigned by their Administrator
• You are required to change your password to something that meets the requirements shown on the screen
• Click the Continue button. You will then be directed to the ServiceBench Home Dashboard.
The Administration Menu allows you to manage your company & user data and can be accessed from any screen in ServiceBench.

- Click the Administration link on the Menu Bar

General Company Information & User Setup Includes:
- Service Provider Self-Maintenance
- Service Provider User Access Profiles
- Service Provider Users
- Locations

Note: Service Order Maintenance (Setup) training goes through Company & User Setups in detail.
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Main Menu, Mega Menus & Navigation

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When you log on to the ServiceBench application, the Home dashboard page opens as shown below.
ServiceBench Main Menu: General Navigation

1. Site Navigation Bar – Key system sections - Mouse over for “Mega Menus”
   - Click on section name to go to “Section Page / Dashboards”

2. User Account Information – Company and user account information and links

3. Help Information – Product support, online help, and training information

4. Mini Dashboards & Search – Quick summary data for enabled application modules
ServiceBench Main Menu: Mega Menus

- Mouse over a section tab to see a Mega Menu for that functional area of the system
ServiceBench Main Menu: Mega Menus

1. Quick Search Feature – Locate specific record with appropriate Identifier
2. Quick Links – Navigate directly to functional pages
3. Recently Viewed – Navigate directly to previously accessed records
4. Section Links – Navigate directly to a section page with selected tab displayed
ServiceBench Main Menu: Alerts

- You may have Alerts at the top of the page, and/or below the Mini Dashboards depending on the page
  - Clicking on the Alert section will expand the page
ServiceBench Main Menu: Alerts

1. Alert Description – Details about the specific alert
2. Resolution Action Button – Navigates to the specific page necessary to resolve the issue (if available)
• **User Account Information**
  - Displays the Company ID the Service Provider is currently logged in under
  - Shows the last activity date and time for the Service Provider
  - Clicking on the My Account link will bring the Service Provider to the Contact Information screen where they can update their general contact information or change their password
  - Clicking the Logout link will log the Service Provider out of the ServiceBench application
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Landing Pages & Dashboards

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• Clicking on a section name brings you to a “Landing Page / Dashboard”
ServiceBench Landing Page / Dashboard

1. **Section Tabs** – Life cycle view of key data records with summarized counts
2. **Filter Bar** – Filters data records displayed by time/date or in some cases key fields
3. **Right Bar** – Quick links to core processing pages as well as Quick Create Link
4. **Mini Dashboard Summary** – Record aging summary for quick action assessment
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Reporting & Analytics

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Reporting

• ServiceBench reports provide you with the ability to query service related information, as well as claims and other system information

• Reports may be run based on an established schedule or on command
• From the Reports Tab select the Reports List option.

• Using any criteria search for the desired report (select the Dispatch Report Category to see all dispatch related reports)

• Click the Search button to see the matching results

• Select the desired report
Most reports have a subset of reports

When you select the report you will see a list of reports with predefined criteria, Dispatch Status Report is one example

These predefined reports may be run on command or scheduled

The last report listed is the report allowing you to select custom criteria and may only be run on command
Reporting – Submitting A Report

- Select one of the predefined reports or the custom selection criteria report to define your own criteria
- Change the report description if you prefer to customize it
- Select the desired notification of completion (email, email with the report attached, or no notification)
- Enter the report criteria (if you are defining custom criteria)
- Click Submit Report button to run the report now. This returns you to the Recently Run Reports page to await the completion of the report
• Reports may also be scheduled on a daily, weekly, or monthly basis with a specific start date, end date, and run time
  - From the Reports Mega Menu select the Reports List link
  - Using any criteria search for the report
  - Click the Search button to see the results list
  - Select the report name link
    • Note – only reports with the icon to the left of the Report Name are schedulable
  - Select one of the predefined reports (Define Custom Selection Criteria can not be scheduled)
  - Change the report description if you prefer to customize it
  - Select the desired notification of completion (email with the report attached)
  - Click Schedule Report button to setup the schedule
• Enter a start date and time of day to run the report
• Enter an end date if you want to stop running the report on a particular date or leave blank for no end date
• Select the daily, weekly, or monthly schedule as desired
• Click the Schedule Report button
• If you have the report emailed to you as an attachment, you may simply open the attachment to the email to view the report

• The report is also available for viewing in ServiceBench even if you have the report emailed to you
• Select the Reports tab on the menu bar which displays your Recently Run Reports

• Select the report name to view the report

NOTE: Only reports with a Completed status may be viewed. Therefore, if you just requested the report you may have to click the Update View button periodically until the report reflects a Completed status. Reports are stored in ServiceBench for 120 days and then fall off the recently run reports list accordingly.
• Select the Reports icon on the icon bar which displays your Recently Run Reports
• Click the checkbox next to the reports
• Click the Delete Selected Reports button
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News, Training & More Info
Product & News Updates

• Check for the latest product & news updates on the main page…

1. New Products
2. News Updates
Training & Additional Resources

- Click on Help Menu from any page…
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Contacting Product Support
Contacting Product Support

- If you run into problems or need assistance with using Service Jobs, the New User Interface, or other aspects of the ServiceBench website, we have several product support options available to assist you:

  - Place your mouse over the “Help” option at the top of the website and you will see a pull down menu with available help options

  - This will allow you to access help on pages in the ServiceBench system, view our Frequently Asked Questions page (FAQ) or contact our product support team directly
Contacting Product Support

Business hours:
7am-6pm Central Time, Monday through Friday

Live Chat option under Product Support or in the “Help” pull-down menu

Contact ServiceBench
877-472-3624
servicebenchhelpmail@newcorp.com
www.servicebench.com
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New User Training
Presented to New Service Providers and Administrators
Recap

• You should now have a:
  - Better general understanding of the ServiceBench application as well as how to more effectively search, navigate, and use the system. This includes items such as:
    • Product overview and how ServiceBench fits into the entire service ecosystem
    • Definition of the key roles of “Service Administrator” and “Service Provider”
    • User Interface, standards, and navigation
    • Reporting
    • Where to obtain more information and training
Questions