

Amy Kretzer

To: Rashi Goel
Cc: Chris Newton; Brad Griffin
Subject: Sales Selling Service Details

Rashi,

Please see details below for the build out of Sales Selling Service. As discussed on the call, we will have two separate types of service sold. I have detailed each type below.

1. Install Services Sold

Trigger Point for Service should be at the time of Order.

Services Sold:

- SGYRO-INST
- SMMS-INST
- SOVEN-INST
- SWT-INST

These items on a Sales Order should trigger a Proactivate Email to the Service Coordinator along with a task on dashboard.

2. Pre-paid Calibration Services (Maintenance Agreement)

Trigger Point should be at time of Shipping

The Sales Order will have a line item for Maintenance Agreement (we will have several types for the various items we sell). The quantity will be set in years.

For accounting purposes, this sales line should go to a prepaid liability account.

The full line on the sales order should be visible on the Service Item.

The Service team will then be able to see the service that was pre-paid. When the item comes in for service, the team should be able to offset the cost of the account with a negative prepaid cost that reduces the liability created at the time of order.

If possible, we would like the service to reduce the quantity remaining on the service order.

Thanks,

Amy Kretzer, MBA

[Company Controller](#)

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