Checklist Template

Company Name	Checklist Name	Date Created	Revision Number
	Service Completion		

Checklist Frequency (Daily/Weekly/Monthly/Project or Phase Based)

Every time a Service Order is Reviewd

Checklist Description

Items that need to be checked when creating the service invoice

Who's Involved		When is the checklist needed?	
Name	**Department or Function**	**Example: Phase completion, proposal created, etc.**	
	Service Manager	When Reviewing Service Order for Invoice.	

What are the items?

Item	Completed
Verify Service is Completed and no return trips are needed	
Verify D-Tools Time matches QuickBook Times - if different, figure out billable time	
Verify any parts that were used	
Verify the parts were delivered in Tracknicity (Reports-Staging-Search"Service")	
Add parts to D-Tools Service Order	

Who does the process transfer to next?

Name	Department or Function	Milestone