SOP Template

Company Name	Process Name	Date Created	Revision Number
One Touch Automation	Troubleshoot Onsite/Install Product	June 2, 2024	1

Process Frequency (Daily/Weekly/Monthly/Project Based)

Service Based

Process Description

On-Site Troubleshooting

Who's Involved		What are the inputs?
Name	**Department or Function**	**Documents, SOW, Approval, Labor, Software, Etc.**
	Service Manager	Created Service Order
	Service Tech	Quick books Time Scheduled Service

What are the sequential steps?

Step Description	Who is Responsible?
Pre-Read Service Order to get an understanding of what you are looking for.	Service Tech
Determine What possible parts you should have on you or available for service issue.	Service Tech
Prior to leaving, give client ETA via captivated (Aim for at least 15 Minute or greater notice)	Service Tech
At arrival, Clock In on Quickbooks Time	Service Tech
Pull up Service Order on D-Tools Cloud and click "Begin" or "Start"	Service Tech
Arrive and discuss any details with client (try to limit to under 5 minutes)	Service Tech
Troubleshoot Issue. Start with the obvious and try to isolate problem.	Service Tech
Determine Cause of issue within 15 minutes, if longer contact Service Manager	Service Tech
Take a photo of the issue and load to service ticket, if able	Service Tech
Can the issue be solved with no additional parts?	Service Tech
If not, do you have the parts you need?	Service Tech
If you do, estimate how long it will take to do the repair.	Service Tech
Let the client know the estimated price of parts needed and estimated time it will take.	Service Tech
If approved, proceed. Use Tracknicity to Scan Parts out of Van Inventory to Client. Write any parts used in "Action Taken" so Service Manager can charge for it.	Service Tech
If not approved, let them know the Service Manager will reach out.	Service Tech
Fix the issue.	Service Tech
Issued Resolved?	Service Tech
Fill out Issue Found in D-Tools Cloud (Press Dash and Space to create bullet)	Service Tech
Fill out Action Taken in D-Tools Cloud (Press Dash and Space to create bullet)	Service Tech
Fill out Next Steps (if any)(Press Dash and Space to create bullet). If service complete, write "Complete"	Service Tech
Complete the D-Tools Cloud Checklists.	Service Tech
Upload any jobsite photos	Service Tech
Click Finish in D-Tools Coud and then Yes, Completed.	Service Tech
Under Accept and Sign click **Skip** and then Finish	Service Tech
Discuss with client and show the repair is now working, let them know its complete or return visit.	Service Tech
Leave the House.	Service Tech
Clock out on Quickbooks Time	Service Tech
Update any notes on Slack & D-Tools	Service Tech

What are the outputs [Defined Standards of Completion or Deliverables]

Completed Service Order in D-Tools

Completed Notes Uploaded to Slack		
Completed Time Sheet		

Who does the process transfer to next?		
Name	**Department or Function**	**Milestone**
	Service Manager	Service Order Review