

| SOP Template  |                        |  |                 |
|---|------------------------|--|-----------------|
| Company Name  | Process Name           | Date Created   | Revision Number |
| One Touch Automation  | Service Turnover       | 6/6/24   | 1               |
| Process Frequency (Daily/Weekly/Monthly/Project Based)  |                        |  |                 |
| Project Based   |                        |  |                 |
| Process Description   |                        |  |                 |
| Service Turnover SOP  |                        |  |                 |
| Who's Involved  |                        | What are the inputs?                                       |                 |
| Name  | Department or Function | Documents, SOW, Approval, Labor, Software, Etc.            |                 |
| Project Manager   | Project Manager        | Complete System Design - As Built Uploaded to Drive        |                 |
| Service Manager   | Service Manager        | Monday Updated and notated if Maintenance Plan is Accepted |                 |
| Sales Person  | Sales Person           |  |                 |
|   |                        |  |                 |
|   |                        |  |                 |
| What are the sequential steps?  |                        |  |                 |
| Step Description  |                        | Who is Responsible?  |                 |
| OFF-SITE - PRE HANDOFF  |                        |  |                 |
| Schedule on-site meeting with Service Manager to initiate handoff after project conclusion  |                        | Project Manager  |                 |
| Service Manager Reviews all files in client folder and makes sure all that they need are there  |                        | Service Manager  |                 |
|   |                        |  |                 |
| AT JOB SITE   |                        |  |                 |
| Provide system overview of installed equipment and operation of system to Service Manager   |                        | Project Manager  |                 |
| Review the equipment locations w/ Service Manager   |                        | Project Manager  |                 |
| Divulge any important notes for the Service Manager to be aware of  |                        | Project Manager  |                 |
|   |                        |  |                 |
| OFF-SITE - POST HANDOFF   |                        |  |                 |
| Create maintenance outline of system with recommended maintenance tasks (using <a href="#">Monday.com</a> & D-Tools Cloud service plans?) |                        | Service Manager  |                 |
| Provide the maintenance plan to the sales person to present for approval to the client  |                        | Service Manager  |                 |
| If approved, update <a href="#">Monday.com</a> and D-Tools Cloud  |                        | Service Manager  |                 |
| Send client Service Welcome email   |                        | Service Manager  |                 |
|   |                        |  |                 |
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|   |                        |  |                 |
|   |                        |  |                 |
|   |                        |  |                 |
| What are the outputs [Defined Standards of Completion or Deliverables]  |                        |  |                 |
| Client will be setup in Service System for on-going Service   |                        |  |                 |
| Email with Service Level Agreement Sent to client so they know what to expect and how to reach out.                                       |                        |  |                 |
| Maintenance Plan is either accepted or denied and notated in clients Monday and D-Tools Cloud   |                        |  |                 |
|   |                        |  |                 |
| Who does the process transfer to next?  |                        |  |                 |
| Name  | Department or Function | Milestone  |                 |
| N/A   | N/A                    | Process Ends Here  |                 |
|   |                        |  |                 |
|   |                        |  |                 |
|   |                        |  |                 |