

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 Monday.com & 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 Monday.com and D-Tools Cloud		Service Manager	
Send client Service Welcome email		Service Manager	
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	