

SOP Template			
Company Name	Process Name	Date Created	Revision Number
One-Touch Automation	Client Request Intake	6/3/24	1
Process Frequency (Daily/Weekly/Monthly/Project Based)			
Project Based			
Process Description			
Client Request Intake by Service Manager			
Who's Involved		What are the inputs?	
Name	Department or Function	Documents, SOW, Approval, Labor, Software, Etc.	
	Office	Client Inquiry	
	Service Manager	Client Request Inputted on Monday Board	
		Client Request Notification via Slack	
What are the sequential steps?			
Step Description			Who is Responsible?
Review Client Request on Monday			Service Manager
Clarify with Office Manager if needed			Service Manager
Reach out to client within 4 hours of Request			Service Manager
Clarify Issue with Client			Service Manager
If Phone Support will suffice - follow Phone Support SOP.			Service Manager
If on-site is needed, figure out clients availablilty and tell them our Scheduling Coordinator will reach out.			Service Manager
Ask for any additional items they would like us to be prepared to look at while on-site.			Service Manager
On Monday Client Request Board, input D-Tools Cloud SO Number			Service Manager
On Monday Client Request Board,set scheduled date			Service Manager
On Monday Client Request Board, set Status to current status			Service Manager
On Monday Client Request Board, click the communication cloud, and update in pertinent info			Service Manager
What are the outputs [Defined Standards of Completion or Deliverables]			
Completed Service Order Filled out on D-Tools Cloud			
Notify Scheduler to Reach out by end of day to schedule service call.			
Who does the process transfer to next?			
Name	Department or Function	Milestone	
	Scheduler	Schedule Service Call	