SOP Template

Company Name	Process Name	Date Created	Revision Number
One-Touch Automation	Create Service Order	6/18/24	1

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

Daily

Process Description

Create a Service Order in D-Tools Cloud & schedule in QB Time

Who's Involved		What are the inputs?
Name	**Department or Function**	**Documents, SOW, Approval, Labor, Software, Etc.**
	Service Manager	Scheduled Service Call
		Open Request on Monday Customer Request Board

What are the sequential steps?

Step Description	Who is Responsible?
Login to D-Tools Cloud - Click on Service - Calls - and under "Open" Click on + to Create New Service Call	Service Manager
Fill Out Pertinent Information, Name, Issue, Site Address - Click "Create"	Service Manager
In D-Tools Cloud Open Service Call and Schedule the Call - Date/Time/Resource	Service Manager
Notify Client about the scheduled Service Call - Check the box in D-Tools Cloud when scheduling	Service Manager
Fill out any pertinent information for Service Tech to do while on-site under Checklists and Internal Notes	Service Manager
Take Assigned Service Order Number and Input Data in Monday - Customer Requests - Open Requests	Service Manager
Fill out Scheduled Date on Monday - Customer Requests Board - Open Requests	Service Manager
Set Status on Monday Board to Scheduled	Service Manager
Login to QuickBooks Time - Schedule Service Call with Assigned Resource	Service Manager
QB Time Click Schedule - Actions - Add Shift	Service Manager
Title - (Client Last Name + Service Order Number)	Service Manager
Set Color to Green, Date, Start Time, End Time, Assign Team Member, Select Customer	Service Manager
Verify Location is Correct	Service Manager
Input Notes for Service Tech	Service Manager
Set: Class(Service), SI Entity(Service Order), SI Entity Number (SC #), SI Phase (Service)	Service Manager

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

Service Order Created within 1 business day of Service Request coming In.
Service Scheduled within 1 business day of Service Request coming in
Monday Customer Requests Board updated

Who does the process transfer to next?

Name	Department or Function	Milestone
	Service Technician	Service Call