

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?

[illegible]

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