

SOP Template			
Company Name	Process Name	Date Created	Revision Number
One-Touch Automation	Update D-Tools & Monday	6/18/24	1
Process Frequency (Daily/Weekly/Monthly/Project Based)			
Weekly			
Process Description			
Prepare Service Request for Invoicing			
Who's Involved		What are the inputs?	
Name	Department or Function	Documents, SOW, Approval, Labor, Software, Etc.	
	Service Manager	Customer Request set to Billing Review in Monday	
		D-Tools Cloud "Ready For Review" Section	
What are the sequential steps?			
Step Description			Who is Responsible?
Look at D-Tools Cloud - Service - Calls - Ready to Review. Open Monday Customer Request Board and look at "Billing Review" Group			Service Manager
Refrence Service Number and open D-Tools Cloud - Service - Calls and locate Service Ticket			Service Manager
In D-Tools Cloud go to "Work Summary" - "Visits" and "Internal Notes" and review			Service Manager
Make any grammer corrections, and move any infomation not needed for client to internal notes.			Service Manager
Is Service Complete? If so, determine billable time.			Service Manager
Under "Work Summary" - Labor Time, Add Labor for determined amount of time			Service Manager
If Products were used, input Products. "Work Summary" Products - Add Product - Additional Products Used			Service Manager
In Upper Portion of Service Call, set Status to "Ready to Invoice"			Service Manager
On Monday Customer Request Board, go to Billing Review and verify all information is filled out (i.e. Issue Resolved Date)			Service Manager
On Monday Customer Request Board, fill out Response Time, to find, go to Captivated and see how many minutes it took to respond to initial request. Write down the minutes.			Service Manager
On Monday Customer Request Board, put a check in the section called After Hours, if support happened after hours.			Service Manager
On Monday Customer Request Board, under communication cloud, copy the notes on what was done to fix issue.			Service Manager
On Monday Customer Request Board - Billing Review - Set Status for "Done"			Service Manager
What are the outputs [Defined Standards of Completion or Deliverables]			
Service Call is Ready to Invoice, within 5 Business days of being completed.			
Who does the process transfer to next?			
Name	Department or Function	Milestone	
	Office	Send Service Invoice	