

SOP Template			
Company Name	Process Name	Date Created	Revision Number
One Touch Automation	Troubleshoot Onsite/Install Product	June 2, 2024	1
Process Frequency (Daily/Weekly/Monthly/Project Based)			
Service Based			
Process Description			
On-Site Troubleshooting			
Who's Involved		What are the inputs?	
Name	Department or Function	Documents, SOW, Approval, Labor, Software, Etc.	
	Service Manager	Created Service Order	
	Service Tech	Quick books Time Scheduled Service	
What are the sequential steps?			
Step Description		Who is Responsible?	
Pre-Read Service Order to get an understanding of what you are looking for.		Service Tech	
Determine What possible parts you should have on you or available for service issue.		Service Tech	
Prior to leaving, give client ETA via captivated (Aim for at least 15 Minute or greater notice)		Service Tech	
At arrival, Clock In on Quickbooks Time		Service Tech	
Pull up Service Order on D-Tools Cloud and click "Begin" or "Start"		Service Tech	
Arrive and discuss any details with client (try to limit to under 5 minutes)		Service Tech	
Troubleshoot Issue. Start with the obvious and try to isolate problem.		Service Tech	
Determine Cause of issue within 15 minutes, if longer contact Service Manager		Service Tech	
Take a photo of the issue and load to service ticket, if able		Service Tech	
Can the issue be solved with no additional parts?		Service Tech	
If not, do you have the parts you need?		Service Tech	
If you do, estimate how long it will take to do the repair.		Service Tech	
Let the client know the estimated price of parts needed and estimated time it will take.		Service Tech	
If approved, proceed. Use Tracknicity to Scan Parts out of Van Inventory to Client. Write any parts used in "Action Taken" so Service Manager can charge for it.		Service Tech	
If not approved, let them know the Service Manager will reach out.		Service Tech	
Fix the issue.		Service Tech	
Issued Resolved?		Service Tech	
Fill out Issue Found in D-Tools Cloud (Press Dash and Space to create bullet)		Service Tech	
Fill out Action Taken in D-Tools Cloud (Press Dash and Space to create bullet)		Service Tech	
Fill out Next Steps (if any)(Press Dash and Space to create bullet). If service complete, write "Complete"		Service Tech	
Complete the D-Tools Cloud Checklists.		Service Tech	
Upload any jobsite photos		Service Tech	
Click Finish in D-Tools Cloud and then Yes, Completed.		Service Tech	
Under Accept and Sign click <b>Skip</b> and then Finish		Service Tech	
Discuss with client and show the repair is now working, let them know its complete or return visit.		Service Tech	
Leave the House.		Service Tech	
Clock out on Quickbooks Time		Service Tech	
Update any notes on Slack & D-Tools		Service Tech	
What are the outputs [Defined Standards of Completion or Deliverables]			
Completed Service Order in D-Tools			
Completed Notes Uploaded to Slack			
Completed Time Sheet			
Who does the process transfer to next?			
Name	Department or Function	Milestone	
	Service Manager	Service Order Review	