

# Service Request Response and Documentation

Version: September 2023  
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Policy Number: SOP-SD-001  
File Name: SOP-SD-001 Service  
Request Response and Docu\_v1  
SEP2023

## 1. Purpose

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This document describes the service request procedural process from customer request through field service visit. This document will clarify timelines, role responsibilities, and key steps that need to take place for consistent and efficient processing of service requests.

## 2. Responsibilities

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- Service Coordinator (SC)
  - Initiate, process, track, and monitor service requests.
  - Create and manage service orders.
  - Obtain customer approval of estimates.
  - Prompt accounting for cost tracking in ExakTime and Quickbooks.
  - Prompt accounting to invoice customer directly.
  - Coordinate service visits.
  - Schedule technicians.
  - Follow up with customers to report completion of service.
- Accounting
  - Process and record requests within Quickbooks, ExakTime, and MRF.
  - Provide cost reports.
  - Invoice customers.
- Field Technician (Tech)
  - Execute service response.
  - Document service activity on site.

### 3. Procedure and Work Instructions

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1. Initial call/request is received from customer. This can take any form from calls to emails.
2. SC records incoming requests using the [Service Request Link](#).
  - a. Note the customer's reason for calling.
  - b. Initial and date notes to confirm the initial response to customer.
    - i. Respond to customers within 24 hours.
3. SC calls the customer for details and information to process the request.
  - a. Conversations details recorded in
    - i. [Customer Master Tracker \(CMT\) – Dashboard sheet](#)
    - ii. Zoho
4. SC generates and provides a service order(SO) estimate to the customer for approval. *Warranty cases do not require an estimate or estimate approval.*
5. SC creates SO. [See QRG-SD-001](#). *Estimate triggers service order creation.*
  - a. SC creates SO number in the [Service Request Spreadsheet – Service order log tab](#) to inform Accounting of new SO details
  - b. If the estimate is declined, either provide new estimate or close service case.
6. Customer approves SO estimate.
  - a. SC emails Accounting of approved SO estimate.
  - b. SO is now billable and trackable.
  - c. Accounting will update their records.
    - i. QuickBooks
    - ii. ExakTime
    - iii. MRF
7. SC schedules site visit with customer.
  - a. Customer approval of estimate for site visit is required before technician dispatch.
  - b. Order materials if required.
  - c. Prepare site specific equipment for Techs. (I.E. Ladders, lifts, tools)
  - d. Coordinate with customer
    - i. Coordinate access with customer
    - ii. Confirm property details. (I.E. Gate codes, property managers)

8. Site visit and issue response are executed.
  - a. Techs document service visit.
  - b. Techs log labor time in ExakTime with service order number.
  - c. Techs log site visit documents for Site Capture Report. [See SOP-QC-002](#)
  - d. *Note any special documenting requirements for RMA's and Warranties.*
9. Changes to the estimate must be made when changes to the service order are made. *(RMA, materials, additional issues)*
  - a. SC generates new estimate to account for changes.
  - b. SC informs customer of updated estimate and customer must approve the new estimate.
10. Service visit is complete.
  - a. SC or Tech generates Site Capture Report when necessary.
  - b. SC generates cost report and compares estimate to final cost.
    - i. Accounting may assist when necessary.
  - c. SC determines billable amount for customer.
  - d. SC informs customer of billable amount.
  - e. SC enters amount into Approved for Billing column in CMT to prompt accounting to invoice customer.
11. Follow-up actions
  - a. SC follows up with customer to:
    - i. Provide an updated service order as an itemized receipt, reflecting billable costs.
    - ii. Request feedback. (Site visit, customer service, etc.)
    - iii. Request google reviews if appropriate.

## 4. *Alternative steps*

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- RMA requires additional steps. See [QRG-SD-002 RMA](#).
  - RMAs can happen at any time during the service order.
  - RMAs can initiate the process as well as happen mid-way through a site visit.

## 5. *Guiding Principles*

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1. **Warranty** cases do not have an estimate and do not require customer approval of an estimate. A service order number must still be generated in the CMT.
2. Note that the service request response can take several forms.
  - i. Billable, when a customer calls in and a service order is billed and associated with the work.
  - ii. When the request is for warranty work, SG becomes the customer for paperwork and billing purposes.
  - iii. Preventative maintenance contracts are a unique category of service and involve special long-term tracking and response terms and processes.

## 6. *Definitions and Acronyms*

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- **Service Order Number:** The code used to track everything related to a service order.

## 7. Appendices and Documentation

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- **Service Request Form spreadsheet:** The spreadsheet is managed by the service department to track notes, generate service orders, and inform finance about progress milestones for service requests.
  - **Request form Tab**: The tab that automatically records service request inquiries.
  - **Service Order Log Tab**: The tab that is used to manually track SO details.
- **Customer Service Master Tracker spreadsheet (CMT):** The spreadsheet managed by the service department to record service history and notes in detail. Data is managed in Zoho, and duplicated in the CMT for staff without Zoho access.
  - **Dashboard Tab**: The tab used to update SO status and inform Accounting of SO details.
- [SOP-QC-002 Field Service Reporting and Documentation](#)
- [QRG-SD-001. Service Order Creation](#)
- [QRG-SD-002 RMA.](#)

## 8. Revision History

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1. Version 1:
  - a. Primary contributor: Bert Klunder | Service Coordinator
  - b. Writer: Rio Astiz
  - c. Approval Date: September 2023
  - d. Approved by: Andrew Wible
  - e. Changes
    - i. Finalized Document