FlatRateKit FREE STARTER

Call Intake Checklist

The first procedure in the SOP Library — the one to standardize before all others. Print this page and tape it by the phone.

A. Capture on every call — no blanks

- ☐Full name of the caller
- ☐Best callback number (mobile preferred)
- ☐Email for invoices and confirmations
- ☐Service address, including unit / gate code
- ☐Billing address, if different
- ☐Problem in the customer's own words
- ☐Emergency? Y / N — and what kind
- ☐Equipment type, brand, and age if known
- ☐Access notes: pets, tenants, locked areas
- ☐Who will be on site and can approve work
- ☐How they heard about you (track this)
- ☐Dispatch fee quoted: $_____ (your fee)
- ☐Window promised: _____ to _____
- ☐Confirmation sent: text / email / both

B. The intake standard — every call, every time

- ☐Answered by ring 3, or voicemail returned within our promised window
- ☐All intake fields captured — no blanks
- ☐Emergency screened; gas smell handled correctly
- ☐No phone diagnosis, no phone repair quote
- ☐Our dispatch fee stated, with how it works
- ☐Honest window booked from the board
- ☐Details read back; confirmation sent
- ☐Payment expectation set; job logged

> **How to use it:** check the boxes on every call for two weeks. It feels slow for two days and automatic by the second week — and a missed gate code or an approver who isn't home stops costing you truck rolls.

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The other four procedures

Intake is #1 of five. Here are the headline checks for the rest of the job cycle — the full library gives you the complete procedure, scripts, and fill-ins behind every box.

2. Dispatch & Scheduling

- ☐Tomorrow's board built and reviewed
- ☐One emergency slot per tech held open
- ☐Day-before confirmations sent to every customer
- ☐"On the way" sent when the tech actually leaves
- ☐Any at-risk window called early, with a new honest window
- ☐Every job has a status before closeout

3. Invoicing & Payment Collection

- ☐Flat-rate price presented from our price book before work started
- ☐Approval captured; any change re-approved before doing it
- ☐Invoice complete, explained, and copy left with the customer
- ☐Payment collected on site, or our written policy followed
- ☐Receipt sent; payment and balance logged in the job record

4. Callback & Warranty Handling

- ☐Callback logged against the original job, same day it came in
- ☐Customer answered within our target time; return visit booked
- ☐Cause diagnosed on site and shown to the customer
- ☐Warranty fix done free, or non-covered work priced and approved first
- ☐Outcome written up and sent to the customer

5. End-of-Day Closeout — the 15-minute closeout

- ☐Every job has a final status and complete notes
- ☐Payments matched to invoices; balances flagged
- ☐Cash and checks secured and recorded
- ☐Parts for tomorrow ordered or pulled
- ☐Every missed call and message returned
- ☐Tomorrow's board built, routed, and assigned
- ☐Open problems added to the running list
- ☐Shop locked; closeout done in about 15 minutes

Get the full SOP Library. All five procedures written out step by step — the intake script word for word, the past-due follow-up cadence, warranty terms you fill in once, printable checklists for all five SOPs, and a policy page for your shop — plus the pricing calculator, price-book template, job-costing tracker, and quote scripts. $89 one-time at getflatratekit.com, covered by a 30-day money-back guarantee.