

Standard Operating Procedure (SOP)

Service Request Intake and Logging Procedures

1. Purpose

This SOP details the **service request intake and logging procedures**, outlining the process for receiving, recording, and prioritizing service requests efficiently. It covers the standardized methods for capturing customer information, categorizing requests, assigning unique identifiers, logging details into the tracking system, and ensuring timely acknowledgment and follow-up. The purpose is to enhance service response accuracy, maintain organized records, and improve overall customer satisfaction through systematic request management.

2. Scope

This SOP applies to all personnel responsible for processing and managing incoming service requests within the organization.

3. Responsibilities

- **Service Desk Staff:** Receive, record, categorize, and acknowledge service requests.
- **Supervisors/Managers:** Monitor the intake process, ensure compliance, and provide support as needed.

4. Procedure

1. **Receiving Requests**
 - Accept requests via designated channels (phone, email, portal, walk-in, etc.).
 - Ensure professionalism and courtesy in all customer interactions.
2. **Capturing Customer Information**
 - Collect essential details: customer name, contact details, organization (if applicable), and preferred contact method.
3. **Categorizing and Prioritizing Requests**
 - Identify the type and urgency of the request based on established criteria.
 - Assign a priority level (e.g., Low, Medium, High, Critical).
4. **Assigning Unique Identifier**
 - Generate a unique service request/reference number using the tracking system.
5. **Logging Details**
 - Enter all collected information into the service request tracking system.
 - Include summary, detailed description, categorization, priority, and all relevant attachments/documentation.
6. **Acknowledging the Request**
 - Send prompt acknowledgment to the customer, including their request ID and expected response time, via their preferred contact method.
7. **Assigning to Appropriate Team/Technician**
 - Assign the request to the appropriate team or technician based on category and workload.
8. **Follow-up and Tracking**
 - Monitor request progress and update the tracking system with any actions taken or communications sent.
 - Escalate unresolved or urgent issues according to escalation guidelines.

5. Documentation and Record-Keeping

- Maintain accurate and complete records of all service requests received and actions taken.
- Ensure all updates, communications, and resolutions are logged in the tracking system.

6. Quality Assurance

- Regularly review request logs for accuracy and completeness.
- Collect feedback from customers for continuous improvement.

7. Revision History

Date	Revision	Description	Author
2024-06-13	1.0	Initial SOP Release	[Your Name]