

Service Work Order

Record a customer service call from the reported fault through to the on-site signature, and decide who pays before the technician leaves.

◆ Part A — The call

1. Service call details

Work order number <i>e.g. SWO-2026-3390</i>	
Service call reference	
Date and time logged	
Logged by	
Received via <i>Phone / Email / Portal / App / Walk-in</i>	
Priority <i>P1 Emergency / P2 Urgent / P3 Routine / P4 Scheduled</i>	
Contract or SLA	
Response due by	
Fix due by	

2. Customer and site

Customer name	
Account number	
Site name and address	
Site contact and phone	
Access notes <i>Keys, codes, parking, escort, permitted hours</i>	

Asset or equipment ID	
Make and model	
Serial number	
Install or commission date	

3. Fault reported by the customer

Reported fault, in the customer's words	
Symptoms observed	
First occurred	
Frequency <i>Constant / Intermittent / Once</i>	
Equipment still in use <i>Yes / No / Partially</i>	
Previous visit for the same fault <i>Yes / No – reference</i>	

✦ Record the complaint verbatim before diagnosing it. A recurring fault that was written up differently each visit will never show up as recurring.

✦ Part B — The visit

4. Attendance

Visit	Technician	Arrived	Departed	On-site hrs	Travel hrs
1	D. Osei	09:20	12:05	2.75	0.80
Total hours on site					

5. Diagnosis and work carried out

Fault found	
Root cause	
Work carried out	
Tests performed and results	
Equipment left <i>Fully operational / Operational with limitations / Out of service</i>	
Limitations or risks the customer was told about	

6. Parts fitted

Part number	Description	Qty	Unit price	Line total	Charge to
<i>CAP-45-370</i>	<i>Run capacitor 45µF 370V</i>	<i>1</i>	<i>18.50</i>	<i>18.50</i>	<i>Billable</i>
Parts total					

✦ Charge to: Billable, Warranty, or Contract. Every line needs one — a blank here is what turns into an unbilled part at month end.

7. Labour

Date	Technician	Hours	Rate	Line total	Charge to
<i>16/09/2026</i>	<i>D. Osei</i>	<i>2.75</i>	<i>62.00</i>	<i>170.50</i>	<i>Billable</i>

Date	Technician	Hours	Rate	Line total	Charge to
Labour total					

◆ Part C — Who pays, and the signature

8. Charge decision

Charge to	Parts	Labour	Total
Billable			
Warranty			
Contract			
Total value of this visit			

◆ Decide this on site, not in the office three days later. The customer signs below having seen it.

9. Customer sign-off on site

Work complete <i>Yes / No — return visit required</i>	
Site left clean and safe <i>Yes / No</i>	
Charges above explained to the customer <i>Yes / No</i>	
Customer name	
Position	
Signature	
Date and time	
Customer comments	

10. Follow-up

Return visit required <i>Yes / No</i>	
Reason	
Parts on order and expected date	
Target date for return visit	
New work order reference	
Recommendation to the customer <i>e.g. replace rather than repair, service interval change</i>	
