SPP 405: Service Report (Invoice)

SPP 400: Pest Prevention & Lawn Service Procedures · https://milo.masseyservices.com/docs/spp-405-service-report-invoice/

Section: Service Procedures
Subject: Service Report (Invoice)
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Policy

A service report is used to document service performed to a customer’s property. All service reports should be computer generated to ensure that they are accurate, neat and legible. In certain emergency instances a handwritten report may be used but should be matched up to the original service report prior to posting to the account record in the customer service database.

Procedures for filling out Service Reports

A service report must be filled out every time a service is performed to a customer’s property. This includes any instance where no application is made, such as a follow up inspection.

1. Fill out the report as you perform your inspection. All treatments should be performed based upon your inspection findings.
2. Communicate in clear language and neat and legible writing all conditions found during your inspection.
    - Explain what you found, what you did to solve it and what the customer can do to help.
    - Emphasize any positive aspects whenever possible.
    - Try to paint a word picture that clearly explains your findings.
3. Document all materials used. Clearly indicate the amounts of each product.
4. Print your name PCID # and date the report. The customer must be able to read your name.

5. Have the customer sign the report whenever possible.
6. Let the customer know that you can collect the payment for the service. Document the check number or method of payment. Bring back the return receipt portion attached to the payment.

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