
Customer Handover and Care Instructions

1.0 Objective & Scope

The objective of this procedure is to ensure a professional, complete, and documented handover of the installed equipment or system to the customer. This includes providing clear care instructions, verifying customer understanding, and obtaining a digital sign-off to close the work order. The Lead Installer is responsible for executing this procedure before leaving the site.

2.0 Required Equipment & Tools

- Mobile tablet with SiteQueue application installed and logged in
- Digital copy of the care instructions document (PDF or in-app)
- Printed care instructions card or laminated sheet (optional, for customer reference)
- Pen and notepad for any additional notes
- Camera or tablet camera for completion photos
- Touch-up paint or finish kit (if applicable per scope)

3.0 Site Safety & Hazard Assessment

- Ensure the work area is clean, debris-free, and all tools are packed away before inviting the customer for the walkthrough.
- Verify that all temporary safety barriers, signage, or floor protection have been removed.
- Confirm that no sharp edges, exposed wiring, or tripping hazards remain in the customer-accessible area.
- Wear clean, professional attire (no soiled coveralls) during the handover to maintain a positive customer impression.

4.0 Step-by-Step Execution Procedure

1. Complete all installation work and perform a final quality check of the equipment or system per the installation SOP.
2. Clean the work area thoroughly, removing all packaging, debris, and tools. Wipe down surfaces and equipment as needed.
3. Open the SiteQueue work order and navigate to the handover section. Ensure the customer is present and available for the walkthrough.
4. Walk the customer through the installed equipment or system, pointing out key features, controls, and any adjustments made.
5. Verbally explain the care instructions, covering cleaning methods, recommended products, warranty terms, and any maintenance schedule.
6. Provide the customer with a printed or digital copy of the care instructions. Ask if they have any questions and answer them clearly.
7. Demonstrate any routine maintenance tasks (e.g., filter replacement, lubrication points) if applicable and safe to do so.

8. Take completion photos of the installed equipment from multiple angles, ensuring the area is clean and well-lit.
9. Upload the photos to the SiteQueue work order and add any relevant notes about the handover or customer preferences.
10. Present the digital sign-off form to the customer on the tablet. Ask them to review the summary and provide their signature.
11. Once signed, confirm the work order status is updated to 'Completed' in SiteQueue. Thank the customer and provide your contact information for follow-up.

5.0 Verification, Sign-off & Reporting

1. Verify that the customer's digital signature is captured and legible in SiteQueue before closing the work order.
2. Confirm that all required completion photos (minimum 3: overall view, close-up of key component, and control panel) are uploaded and associated with the work order.
3. Review the care instructions document to ensure it matches the specific equipment installed (model, serial number, date).
4. Log any additional notes or customer requests in the SiteQueue notes field for future reference.
5. Submit the work order for supervisor review if required by company policy, or mark it as final if no further approval is needed.
6. Send a follow-up email or SMS to the customer (via SiteQueue or CRM) with a link to the digital care instructions and a satisfaction survey.

Regulatory Disclaimer: This document is a generic site management template provided for educational purposes. The end-user assumes all liability for reviewing, adapting, and validating all field protocols against local site requirements.