FREE OPERATIONS RESOURCE

Field-Service Exception Management Toolkit

Five practical templates for controlling the jobs that do not follow the normal path: urgent work, missing assignments, threatened SLAs, incomplete evidence and failed accounting handoffs.

WHAT THIS HELPS YOU CONTROL	WHO SHOULD USE IT
Dispatch exceptions, ownership, escalation, proof of work, invoice readiness and integration recovery.	Service managers, dispatchers, operations leaders, cleaning teams, HVAC contractors and multi-location field-service businesses.

HOW TO USE IT

Start with the exception register. Choose one workflow where delays are visible and measurable. Define ownership and escalation before adding automation. Review the register weekly for four weeks, then automate only the repeated decisions.

A toolkit should create a better operating conversation, not another abandoned spreadsheet.

Use the blank fields during a 30-minute team review. Record your current rule first. Mark proposed changes separately. Assign one owner for every exception type.

TOOL 01

Dispatch exception register

Create one queue for every job that needs a human decision. A job leaves the queue only when it has an owner and a recorded next action.

EXCEPTION	TRIGGER	OWNER	RESPONSE	ESCALATE WHEN
Urgent job	Priority or same-day request	Dispatcher	Confirm capacity and qualification	No owner in 10 minutes
Unassigned job	No eligible person assigned	Scheduler	Review skills, territory and load	Arrival window is threatened
Late arrival	ETA exceeds promised window	Dispatcher	Contact customer and reset ETA	Customer cannot accept delay
Missing evidence	Required photo or sign-off absent	Field lead	Request evidence before closure	Invoice cutoff is threatened
Blocked invoice	Job complete but accounting data invalid	Billing owner	Correct customer, tax or line data	Unresolved after one business day

Your additional exception

NAME	TRIGGER	OWNER	NEXT ACTION

TOOL 02

SLA control sheet

Translate customer promises into observable triggers. The team should know what is threatened before a customer has to ask.

	CONTROL	OWNER / NOTES
■	Every SLA has a measurable trigger and a named data source.	
■	Warning thresholds occur before the contractual deadline.	
■	Each threatened SLA automatically receives an owner.	
■	Customer notification rules distinguish internal warnings from confirmed delays.	
■	Paused jobs record the reason, approver and revised commitment.	
■	Weekly reporting separates met, threatened, missed and disputed SLAs.	
■	Repeated failures produce a corrective action, not only a status report.	

CUSTOMER / CONTRACT	PROMISE	WARNING	OWNER

TOOL 03

Job-completion evidence checklist

Define invoice-ready completion before work reaches the field. Evidence requirements can vary by customer, job type and contract.

	CONTROL	OWNER / NOTES
■	Required arrival and completion timestamps captured.	
■	Location, asset or service area identified correctly.	
■	Before-and-after photos present where required.	
■	Technician or cleaner notes use a consistent structure.	
■	Customer sign-off or reason for unavailable signature recorded.	
■	Materials, quantities and additional work documented.	
■	Safety, compliance or inspection fields completed.	
■	Evidence reviewed before the job becomes invoice-ready.	

TOOL 04

QuickBooks handoff map

Make the accounting boundary explicit. Decide what creates an invoice, which system owns each field and what happens when validation fails.

DATA	SOURCE	DESTINATION	FAILURE	OWNER
Customer	CRM or field-service platform	QuickBooks customer	Duplicate or unmatched customer	Billing owner
Completed job	Field-service platform	Invoice draft	Missing completion evidence	Operations
Labour / materials	Job record	Invoice lines	Unknown item or tax code	Finance
Payment status	QuickBooks	Operations dashboard	Sync delay or failed webhook	System owner

Release gate

Test duplicates, missing tax codes, edited customers, cancelled jobs, partial payments and temporary API failures before enabling automatic invoice creation.

TOOL 05

Failed-integration recovery plan

Reliable automation includes failure visibility, safe retries and a human recovery path. A silent failure is an operational risk.

	CONTROL	OWNER / NOTES
■	Every automated handoff creates a success or failure record.	
■	Failures preserve the original payload and readable error reason.	
■	Temporary failures retry safely without creating duplicates.	
■	Permanent failures enter a visible exception queue.	
■	The queue displays impact, age, owner and next action.	
■	Manual corrections are auditable and can be replayed.	
■	Alerts escalate only after defined thresholds to avoid alert fatigue.	
■	A weekly review identifies recurring causes and prevention work.	

30-MINUTE IMPLEMENTATION SESSION

Turn one recurring exception into a controlled workflow.

Choose a single costly failure. Document the trigger, operational impact, decision owner and acceptable response time. Run the manual process for two weeks. Automate only after the team agrees on the rule and recovery path.

01	**Choose**	Select one exception with visible cost or customer impact.
02	**Define**	Write the trigger, owner, next action and escalation threshold.
03	**Measure**	Record volume, age, resolution time and repeated causes.
04	**Improve**	Remove unnecessary decisions before introducing automation.
05	**Automate**	Add notifications, integrations and safe recovery in stages.

Need help designing the workflow?

Use Myriah's interactive project planner or book a focused 30-minute conversation. We design custom workflow extensions, internal tools, portals, reporting and integration recovery for service businesses.

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