SOP Template

Company Name	Process Name	Date Created	Revision Number
One Touch Automation	Order Products	5/14/24	Rev. 1

Process Frequency (Daily/Weekly/Monthly/Project Based)

Project Based

Process Description

Order requested product for each job - contract, T&M, Service etc

Who's Involved		What are the inputs?
Name	**Department or Function**	**Documents, SOW, Approval, Labor, Software, Etc.**
Melissa Feller	Office	Dtools, Dtools Cloud, QB

What are the sequential steps?

Step Description	Who is Responsible?
Receive Monday.com notifcation product is requested	Office
Confirm with project manager if product OK to order	Office
Create PO for product needed in Dtools	Office
Submit the PO to supplier	Office
Push D-Tools PO to QB	Office
Print out any confirmations and makes notes in D-Tools	Office
When confirmation numbers/tracking numbers are generated - update D-Tools	Office
Update Monday.com and D-Tools status (ETA date, Tracking Numbers, Backorder status, etc)	Office
If credit card order, provide receipt to Office Manager	Office
Keep tabs on order status to provide project manager with updates	Office

What are the outputs [Defined Standards of Completion or Deliverables]

Completed when all product/items are ordered for the project/service/CO

Who does the process transfer to next?

Name	Department or Function	Milestone
Melissa	Warehouse	Receive Product
Melissa	Office	