

SOP Template			
Company Name	Process Name	Date Created	Revision Number
One-Touch Automation	Slack Canvas Creation	6/19/24	V1
Process Frequency (Daily/Weekly/Monthly/Project Based)			
Project Based			
Process Description			
Setup of project Canvas in Slack			
Who's Involved		What are the inputs?	
Name	Department or Function	Documents, SOW, Approval, Labor, Software, Etc.	
Operations	Operations	Slack channel created	
Project Manager	Project Manager	Design Documentation is prepared	
		Slack List Created	
What are the sequential steps?			
Step Description			Who is Responsible?
Slack Task List Setup			
Saving Template to Client Slack			
1. In top right, press three vertical dots icon			Ops/PM
2. Select "Make a copy"			Ops/PM
3. Rename copy of list to [CLIENT NAME] – Project Task List			Ops/PM
4. Press "Share" in top right corner			Ops/PM
5. Type in client slack channel			Ops/PM
6. Press "Share"			Ops/PM
Setup Room # and Name:			
1. Right-click the column header -> Select "Edit Field"			Ops/PM
2. Under the text box "Type and enter to add", Enter Room Number and Room name in this format- ex. 001 – Foyer			Ops/PM
3. Hit "Enter" on keyboard to create the tag.			Ops/PM
4. Keep typing and entering Room #/names until list is populated.			Ops/PM
5. If doing a big list, enter all rooms and press save. Then go back in and adjust colors of tags to be by floor grouping.			Ops/PM
6. Leave "Default" empty			Ops/PM
Project Column:			
1. Right-click the column header -> Select "Edit Field"			Ops/PM
2. Under the Default, select the correct slack channel by typing in the name.			Ops/PM
3. Press "Save"			Ops/PM
Slack Canvas Setup			
In Slack, select client channel and add a "Canvas" using top right post-in note icon			Ops/PM
In the Canvas, add four sections: Site Address, Punchlists, Documentation, Project Team			Ops/PM
For each section, add a header using the H1 header			Ops/PM
After each section, add a divider to allow collapsing the section			Ops/PM
In punchlist, add URL to the Slack List created for project			Ops/PM
Under documentation, add URLs that link to the Google Drive: Field Documentation, Google Sheets client document & Google Drive contracts folder for the client			Ops/PM
Under project team, add a table with four columns (Name, Role, Phone #, Email) and add information for all parties involved in the project			Ops/PM
When setup, lock the canvas from edits by clicking three vertical dots and "lock edits"			Ops/PM
Confirm links work and layout is legible from a mobile device			Ops/PM

What are the outputs [Defined Standards of Completion or Deliverables]		
Slack Canvas is created		
Who does the process transfer to next?		
Name	Department or Function	Milestone