

SOP Template

Company Name	Process Name	Date Created	Revision Number
One-Touch Automation	Receiving Products	5/14/24	Rev. 1
Process Frequency (Daily/Weekly/Monthly/Project Based)			
Daily			
Process Description			
Receiving products from Contacts, Service, T&M etc			
Who's Involved		What are the inputs?	
Name	Department or Function	Documents, SOW, Approval, Labor, Software, Etc.	
Melissa Feller	Office	Dtools, Quickbooks and Excel	
Warehouse	Warehouse		
What are the sequential steps?			
Step Description		Who is Responsible?	
Receive shipment		Warehouse	
Remove packing slips and check contents to make sure what is on packing slip is in the box.		Warehouse	
Note any discrepancies on the packing slip		Warehouse	
Reference D-Tools purchase order to determine which product is for which project		Warehouse/Office	
Label Boxes with correct job/service name and put in correct spot - Staging, RMA or Service Shelf		Warehouse	
Warehouse deliver packing slip to office for receiving		Warehouse	
Take packing slip and mark off received product in D-tools		Office	
Take packing slip and mark off on client estimate Excel sheet		Office	
Give packing slip to office for billing		Office	
If all products for job are in - update Monday board		Office	
What are the outputs [Defined Standards of Completion or Deliverables]			
Product in staging area, product received in D-Tools, packing slip given to office manager, Monday.com board updated			
Who does the process transfer to next?			
Name	Department or Function	Milestone	
Donna	Office	Schedule Rough-In	
Melissa	Warehouse	Prepare Trim Documentation	
Project Manager	PM	Schedule Rack Build	

		Schedule Equipment Delivery
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