

SOP Template			
Company Name	Process Name	Date Created	Revision Number
One Touch Automation	Initial Client Set-up	5/9/24	V1
Process Frequency (Daily/Weekly/Monthly/Project Based)			
Project Based			
Process Description			
Setting up the client folder and transferring the proposal into quickbook when the contract is signed.			
Who's Involved		What are the inputs?	
Name	Department or Function	Documents, SOW, Approval, Labor, Software, Etc.	
Donna	Office Manager	D-tools link w/signed contract	
Rachael	CFO		
What are the sequential steps?			
Step Description		Who is Responsible?	
Create Client in QB		Office Manager	
Send proposal from D-tools to QB		Office Manager	
Send invoice to Client		Office Manager	
Put copy of signed contract & install copy in Google Drive & Dropbox Folders		Office Manager	
Create Management report to create a list of product needed for project		Melissa	
Create Slack Channel (Add Clayton and Josh to slack channel if not already joined)		Office Manager	
Put install copy into Slack Channel		Office Manager	
Put Clients Name, Contract and Salesperson Initials to Job Summary and list Payment Schedule		Office Manager	
Update <a href="#">Monday.com</a> project board (Deposit sent status, deposit sent date)		Office Manager	
CFO Internal Files			
Update in-progress sheet in excel		CFO	
Update WIP in excel		CFO	
Create excel estimate in client dropbox folder		CFO	
Update commission report in excel		CFO	
Update labor sheet in google drive		CFO	
What are the outputs [Defined Standards of Completion or Deliverables]			
Client set up			
Invoice sent			
Reports created			
Who does the process transfer to next?			
Name	Department or Function	Milestone	
Office Manager	Office	Payment Received	
Donna or Melissa	Office	Do we need to order more products?	