

SOP Template			
Company Name	Process Name	Date Created	Revision Number
One Touch Automation	Create Proposal/Order Parts	June 2, 2024	1
Process Frequency (Daily/Weekly/Monthly/Project Based)			
Project Base			
Process Description			
Create Proposal/Order Parts			
Who's Involved		What are the inputs?	
Name	Department or Function	Documents, SOW, Approval, Labor, Software, Etc.	
	Service Manager	On-Site Troubleshooting Notes	
	Sales	Slack Information on what is needed	
	Ordering		
What are the sequential steps?			
Step Description			Who is Responsible?
Receive Notification that a new product/equipment is needed.			SM or Sales
Open Opportunities in D-Tools Cloud			SM or Sales
Create New Opportunity			SM or Sales
Include Parts for proposed solution			SM or Sales
Make sure Labor is in-line for how long you estimate it taking			SM or Sales
Add a proposal description under design tab			SM or Sales
Click on Review and see look at parts and labor look good.			SM or Sales
Click on create Proposal			SM or Sales
Decide if you want to send the MultiMedia Proposal or Quick Quote			SM or Sales
Remove the unused or unnecessary portions on quote.			SM or Sales
Review proposed solution with Service Manager or Service Tech			SM or Sales
Click on Send			SM or Sales
Edit Email so it is personalized to client.			SM or Sales
Hit Send			SM or Sales
On Monday "Lead" Board, enter the information for the proposal sent			SM or Sales
If Client Signs Off, click "Won" in D-Tools Cloud			SM or Sales
On Monday.com, change Status to "Won"			SM or Sales
Notify Purchaser who will follow the purchasing SOP.			SM or Sales
What are the outputs [Defined Standards of Completion or Deliverables]			
Proposal Prepared and Sent within 24 hours of Initial Service Call.			
Who does the process transfer to next?			
Name	Department or Function	Milestone	
	Office	Initial Invoice Sent (if pertinent)	
	Purchaser	Parts Ordered	