

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 notification 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		