

SOP Template			
Company Name	Process Name	Date Created	Revision Number
One Touch Automation	Project Update - All Phases	5/14/24	V2 (Updated 6/19/24)
Process Frequency (Daily/Weekly/Monthly/Project Based)			
Weekly / Project Based			
Process Description			
This documents the workflow for field changes (as-builts) that need to be transcribed to documentation and project lists.			
Who's Involved		What are the inputs?	
Name	Department or Function	Documents, SOW, Approval, Labor, Software, Etc.	
Technician	Field Technician	Variance from design	
Project Manager	Project Manager	Rough-in complete	
Josh	Designer	Trim Complete	
Operations	Operations	Google Drive, Google Docs, Monday, Slack	
What are the sequential steps?			
Step Description		Who is Responsible?	
Weekly - Confirm punch list is up to date as work is being completed		Project Manager	
Weekly - Add new tasks to punch lists		Project Manager	
Weekly - Review builder software to confirm timelines noted on Monday are still accurate		Project Manager	
Weekly - Confirm Monday statuses are up to date		Project Manager	
Weekly - If backordered product, check status with warehouse		Project Manager	
Weekly - Review Tracknicity to verify product has been delivered and returned		Project Manager	
Weekly - Review timesheets for technicians for accuracy and hours tracking		Operations	
Monthly - Run project hour reports on scheduled projects		Operations	
Monthly - Review WIP report and project estimates spreadsheet for budget		Operations	
Rough-in - Determine if a field edit is necessary		Technician	
Rough-in - Relay field edits (as-builts) to designer		Project Manager	
Rough-in - Relay scope changes to designer		Project Manager	
Rough-in - Update documentation to reflect updates		Designer	
Rough-in - Post updated documentation to Google Drive field documentation folder		Designer	
Rough-in - Determine if internal or external change order		Project Manager	
Rough-in - If external change order, notify sales person to initiate change order creation		Project Manager	
Rough-in - If internal change order, create change order in D-Tools		Project Manager	
Rough-in - Notify Office Manager of internal change order via slack		Project Manager	
Rough-in - Notify Warehouse of internal change order (if applicable) via slack		Project Manager	
Trim - Determine if a field edit is necessary		Technician	
Trim - Relay field edits (as-builts) to designer		Project Manager	
Trim - Relay scope changes to designer		Project Manager	
Trim - Update documentation to reflect updates		Designer	
Trim - Post updated documentation to Google Drive field documentation folder		Designer	
Trim - Determine if internal or external change order		Project Manager	
Trim - If external change order, notify sales person to initiate change order creation		Project Manager	
Trim - If internal change order, create change order in D-Tools		Project Manager	
Trim - Notify Office Manager of internal change order via slack		Project Manager	
Trim - Notify Warehouse of internal change order (if applicable) via slack		Project Manager	
Finish - Determine if a field edit is necessary		Technician	
Finish - Relay field edits (as-builts) to designer		Project Manager	

Finish - Relay scope changes to designer	Project Manager	
Finish - Update documentation to reflect updates	Designer	
Finish - Post updated documentation to Google Drive field documentation folder	Designer	
Finish - Determine if internal or external change order	Project Manager	
Finish - If external change order, notify sales person to initiate change order creation	Project Manager	
Finish - If internal change order, create change order in D-Tools	Project Manager	
Finish - Notify Office Manager of internal change order via slack	Project Manager	
Finish - Notify Warehouse of internal change order (if applicable) via slack	Project Manager	
What are the outputs [Defined Standards of Completion or Deliverables]		
Field changes are documented and updated in documentation		
Internal change order created		
Sent to sales for external change order		
Who does the process transfer to next?		
Name	Department or Function	Milestone
Project Manager	Project Manager	Rough-In Changes Scheduled
Project Manager	Project Manager	Site Inspection (After Rough-In)
Project Manager	Project Manager	Project Status Update
Sales Person	Sales	Create Change Order