

SOP Template			
Company Name	Process Name	Date Created	Revision Number
One-Touch Automation	Schedule Rough-In	6/19/24	V1
Process Frequency (Daily/Weekly/Monthly/Project Based)			
Project Based			
Process Description			
Outlines the scheduling of rough-in process			
Who's Involved		What are the inputs?	
Name	Department or Function	Documents, SOW, Approval, Labor, Software, Etc.	
Project Manager	Project Manager	QB Time, Slack, Google Drive, Google Docs	
Clayton	Field Manager		
What are the sequential steps?			
Step Description			Who is Responsible?
Quickbook Time			
In the schedule window, add an event to the select tech and day			Field Manager
For title, use [Client Last Name] - Rough-In			Field Manager
Set color to ORANGE			Field Manager
Fill out remaining information			Field Manager
Add general notes if scope is narrowed for specific day			Field Manager
Slack - List Creation			
Create a new list using the "TEMPLATE - Project Task List" list			Project Manager
Rename the new list to [Client last name], [Client first name] - Punch List			Project Manager
In slack canvas, add list URLs to the Punch List section			Project Manager
Slack - Project Task List			
In the "Room # - Room Name" column, populate all rooms for dropdowns using the format (ex. 001 - Foyer). Use color coding RED for Lower Level rooms, BLUE for 1st Floor Rooms, GREEN for 2nd Floor rooms. Add "Global" for items that don't have specific room. Use GRAY for this item.			Project Manager
In the "Project" Column, assign the client slack channel as the default option			Project Manager
Add all Rough-In tasks to the list and fill out the columns as much as possible			Project Manager
After all items are added, verify the other view "Task List by Room" is laid out correctly			Project Manager
General Items			
Update Monday board schedule status and time frame for work			Project Manager
1 week before Rough-In, print out drawings (if needed) and provide to technicians during walkthrough			Project Manager
What are the outputs [Defined Standards of Completion or Deliverables]			
Scheduled in QB Time			
Slack task list has been created and filled out			
Who does the process transfer to next?			
Name	Department or Function	Milestone	
Project Manager	Project Manager	Rough-In Walkthrough	