SOP Template

Company Name	Process Name	Date Created	Revision Number
One Touch Automation	Develop Design Package - Fast Track	5-15-24	1

Process Frequency (Daily/Weekly/Monthly/Project Based)

Project Based

Process Description

Design Package Creation

Who's Involved		What are the inputs?
Name	**Department or Function**	**Documents, SOW, Approval, Labor, Software, Etc.**
Ryan or Jeff	Sales	Documents and Software

What are the sequential steps?

Step Description	Who is Responsible?
Open "Finder" on Mac	Sales
Go to Google Drive along Left side	Sales
Navigate to "Client Shared" Folder	Sales
Right Click "!Client, Template"	Sales
Duplicate	Sales
Rename New Folder(Clients last name, first name)	Sales
Open "Documentation and Checklists Templates" Sheet	Sales
Fill out and complete the first 5 items assigned to Sales (If pertinent)	Sales
Open UniFi Design Site, upload plans and create WiFi Heat Map and Camera layout	Sales
Once Completed, Click Completed Check Box, fill in date, fill in name	Sales
Notify Design Team	Sales

What are the outputs [Defined Standards of Completion or Deliverables]

The process is done when the "Sales" portion of the Design Package is all checked off.

Who does the process transfer to next?

Name	Department or Function	Milestone
Josh Kalscheur	Design	Design Package Completion