

SOP Template			
Company Name	Process Name	Date Created	Revision Number
One Touch Automation	Enter Client Info in Slack	5-29-24	1
Process Frequency (Daily/Weekly/Monthly/Project Based)			
Project Based			
Process Description			
Proper Client setup in Slack			
Who's Involved		What are the inputs?	
Name	Department or Function	Documents, SOW, Approval, Labor, Software, Etc.	
	Office	Slack Channel has been created already by Office	
	Sales	Enter Information into Slack	
What are the sequential steps?			
Step Description			Who is Responsible?
Create a Pinned Message in Slack - See Slack Client Template (av-1-cleint-setup-template)			Sales
Information to include: Clients Name, Email, Phone			Sales
Builder Name, Email Phone			Sales
Project Manager for Builder's Name, Email, Phone			Sales
Electrician's Name, Email, Phone			Sales
Designer's Name, Email, Phone			Sales
Once Message is created hit enter.			Sales
Hover over message and click on 3 vertical dots (more actions)			Sales
Pin to Channel			Sales
What are the outputs [Defined Standards of Completion or Deliverables]			
Slack channel has pinned message with all pertinent project contact information			
Who does the process transfer to next?			
Name	Department or Function	Milestone	
	PM	Project Handoff	