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