

	Code:	ND0124
	Version:	01-24
	Effective per:	11/01/2024
	Pages:	
	Authorized by:	Fatima Herrera

***** WHEN OVER, PLEASE REMOVE THIS AREA FROM THE MASTER *****

To create the Master's code use: Name of the Client + version number + current year. It will look something like Virtue Ally, Version 1, 2024 = VA0124. Just add this number to the code area.

Version is the version number + the current year = 01-24.

The effective date is when the SOP was created when it started being applied or when you started working with it.

The Pages section is the number of pages the document has.

Authorized by: is the General Manager or Account Manager for your client.

CLIENT OVERVIEW.

Small company summary.

People who are important to your work. Ex:

Sonya Muller, Accounts Payable – Small description of what their role is and why it's important to your work.

- Email:
- Phone number:

Andres Silvio, Sales Manager – Small description of what their role is and why it's important to your work.

- Email:
- Phone number:

Richie Wilson, Property Manager – Small description of what their role is and why it's important to your work.

- Email:
- Phone number:

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[Client or Department's name] Master Manual

* You will have to follow a template for each Standard Operating Process (SOP). You need to include everything related to developing it and layout each step, platforms/websites, people in charge, used credentials, where to click and how to submit, etc.

The below is a draft of how things can look and we would like to ask you to stick to this template as much as possible. *

TEMPLATE FOR EACH SOP:

[SOP NAME. i.e.: Email Clean-up].

Why: Why is the SOP executed? How does it create value in the business?

Where: Is the location executed in a specific place? (physical or digital)

When: Is this SOP executed at a specific time? After a specific action?

Who: Who executes the SOP? Use titles instead of names wherever possible so that as the company grows, the SOPs scale more effectively (General Manager = G.M. or Sales and Marketing = S&M). If it's not a specific department that handles this but a person, use INITIALS and who is responsible to make sure this is completed.

1. Objectives & Scope

Specify at least 3 objectives for this SOP and to which areas (Scope); within the company, this is important.

2. Abbreviations and definitions

List all important acronyms used by you or the people in the company. i.e.:

PM – Property Manager.

FB – Facebook.

VA – Virtual Assistant.

VP – Vice President.

MM – Marketing Manager.

DH – Help Desk.

3. Tasks, responsibilities, and accountabilities

This table will help you outline the main steps within the SOP and who is in charge of doing them. It might help to take 30 minutes to go over the tasks you performed in the past month and add those that are repetitive each month, then move on to those that happen regularly, and finish with those that might show up at a point (is always good to have an idea of what things might happen).

Task	Authorizes	Responsible
Create Tags	M.M.	M.M.
Create filters	M.M.	M.M.
Change View	M.M.	V.A.

Delete Spam	M.M.	V.A.
Delete Promo Emails	M.M.	V.A.

4. Procedure

4.1 Create Tags

Explain the process to create Tags in the used platform. Include screenshots if you think they are needed.

Step 1.

Step 2.

Step 3.

Step 4.

Step 5.

4.2 Create Filters

Explain the process to create Filters in the used platform. Include screenshots if you think they are needed.

Step 1.

Step 2.

Step 3.

Step 4.

Step 5.

4.3 Change view

Explain the process to change the email view in the used platform.
Include screenshots if you think they are needed.

Step 1.

Step 2.

Step 3.

Step 4.

Step 5.

4.4 Delete Spam

Explain the process to delete spam in the used platform. Include screenshots if you think they are needed.

Step 1.

Step 2.

Step 3.

Step 4.

Step 5.

4.5 Delete Promo Emails

Explain the process to delete promo emails in the used platform. Include screenshots if you think they are needed.

Step 1.

Step 2.

Step 3.

Step 4.

Step 5.

5. Related Documents

Add drive documents that are used in the process.

6. Related Forms

Add drive forms that are used in the process.

7. References

Important links to read or review for additional information.

8. Attachments

Images or sound links that support the process (if any).

9. Problem solving

Roadblocks and solutions you've used for them.

[SOP NAME] i.e.: Scheduling a Meeting.