

A handwritten signature in black ink, reading "Tristan Gardner". The signature is written in a cursive style with a large, stylized 'G' and is underlined with a double line.

“One-Off Orders” Fulfillment Process
Standard Operating Procedure

Table of Contents

Revisions:	3
Document Propose:	4
1. Departments Involved	5
2. Pipeline Stages and Expectations	6
A. Post Sale / Project initiation Stages:	6
1. New	6
2. New – Awaiting Payment.....	6
3. Ready for Ordering	6
B. Implementation Stages:	7
4. In Progress.....	7
5. Waiting for Equipment	7
6. Waiting on Admin Team	7
7. Scheduled / Waiting for Customer	8
8. On Hold.....	8
C. Completion & Accounting Stages:	8
9. Ready to Be Billed	8
10. Completed	9
3. Required Notes & Internal Communication	9
4. Handoff Rules	9
5. Hubspot Automations	10

Revisions:

- 11/17/2025 – document creation

Document Propose:

This SOP outlines the standardized workflow for managing all One-Off orders in HubSpot. It defines responsibilities, order statuses, handoffs, and required departmental actions to ensure consistent fulfillment from contract signature through billing completion.

1. Departments Involved

Sales:

- Communicates customer details, expectations, and special requirements
- Confirms payment where applicable

Accounting:

- Ensures all requirements are met before fulfillment begins
- Hands off to implementation at the appropriate time
- Monitors incoming payments for applicable order types
- Triggers “Ready for Ordering” when the project is logged or payment is received
*(*only applies if it's a new car wash camera system)*
- Bills customers once implementation completes fulfillment
- Closes out the final order status

Implementation:

- Fulfills and ships orders
- Communicates internal needs (admin, equipment, etc.)
- Maintains correct and accurate pipeline status updates

2. Pipeline Stages and Expectations

Below is the complete list of statuses and the required actions for each.

A. Post Sale / Project initiation Stages:

1. New

Purpose: Order created; waiting for accounting review

Owner: Accounting

Action Required:

- Confirm contract details
- Review if payment is required before starting (*new car wash jobs only unless indicated on quote from sales*).
- Move to appropriate next status

2. New – Awaiting Payment

Purpose: Payment required before anything can proceed (e.g., new full camera system orders)

Owner: Accounting

Action Required:

- Monitor for incoming payment (check or otherwise)
- Move to **Ready for Ordering** once payment is received

3. Ready for Ordering

Purpose: Order is approved for implementation to begin

Owner: Accounting

Action Required:

- Ensure all documentation is correct in Quickbooks / spreadsheets
- Confirm payment received when applicable
- Provide Implementation with any special notes
- Implementation will move next to **In Progress**

B. Implementation Stages:

4. In Progress

Purpose: Implementation is actively preparing/fulfilling the order

Owner: Implementation

Action Required:

- Begin fulfillment process by ordering or pulling equipment from inventory
- Update Hubspot ticket notes as necessary
- Move to appropriate waiting status if blocked

5. Waiting for Equipment

Purpose: Items have been ordered and we are waiting for them to arrive to our office

Owner: Implementation

Action Required:

- Monitor expected arrival
- Communicate with internal team or customer as needed

6. Waiting on Admin Team

Purpose: Something prohibits Implementation from fulfilling the order, someone else needs to get involved to assist in ordering, Implementation has been instructed to hold on ordering.

Owner: Implementation

Action Required:

- Notify admin team
- Follow up internally
- Move back to **In Progress** when admin tasks are complete

7. Scheduled / Waiting for Customer

Purpose: All ordering / configuration tasks are complete, but there's now a waiting period for something like an installation date, training / visit in the future, or delayed shipping event for the order.

Owner: Implementation

Action Required:

- Log what the Implementation completion date will be in a HubSpot ticket note
- Communicate clearly with customer
- Ensure the project stays on schedule

8. On Hold

Purpose: Something outside of implementation / customer control is blocking progress

Owner: Implementation

Action Required:

- Document reason in Hubspot ticket
- Revisit weekly
- Move back to appropriate active stage once unblocked

C. Completion & Accounting Stages:

9. Ready to Be Billed

Purpose: Implementation has completed fulfillment; order is shipped or otherwise delivered

Owner: Implementation & Accounting

Action Required:

- Implementation - Confirm all fulfillment steps are complete
- Implementation - Update ticket status as "Ready to Be Billed" for Accounting
- Accounting – Verify / create invoices in Quickbooks and update necessary spreadsheets
- Accounting – Move ticket to **Completed**

10. Completed

Purpose: Billing finished - order is fully closed out

Owner: Accounting / David

Action Required:

- None - No further workflow required

3. Required Notes & Internal Communication

- All details regarding a fulfillment of an order must be documented inside the Hubspot ticket record.
- Any status change that requires internal notification should include a short note.
- No order should sit in a “waiting” or “on hold” status without a weekly review.
- Implementation and Accounting should keep a clear communication channel for payment-dependent orders.

4. Handoff Rules

Sales → Accounting

Occurs when deal is signed and new order ticket is created.

Sales / Accounting → Implementation

Occurs at “Ready for Ordering.”

Implementation → Accounting

Occurs at “Ready to Be Billed.”

Accounting → Closed

Occurs at “Completed.”

5. Hubspot Automations

Pipeline Status	Automation Name	Trigger Details
New	Initiate One Off Order Implementation Process and send notification emails	Ticket enters “New” status
New – Awaiting Payment		
Ready for Ordering	One Off Order Pipeline Ready for Ordering	Ticket enters “Ready for Ordering” status
In Progress		
Waiting for Equipment		
Waiting for Admin Team		
Scheduled / Waiting for Customer		
On Hold		
Ready to Be Billed (Completed by Implementation)	One Off Order Pipeline Ready to Be Billed	Ticket enters “Ready to be Billed” status
Completed	One Off Order Pipeline Completed Entire Process	Ticket enters “Completed” status