

SOP Library — SOP

How this module works

Authors, organizes, and tracks completion of the business's Standard Operating Procedures — AI-assisted drafting, per-team-member completion tracking, and one-click conversion of an SOP's steps into real Tasks.

SECTIONS

SOP CRUD Create, edit, delete, and pin SOPs with a title, category, ordered steps, tags, assigned team members, and notes.	AI-Generate Claude drafts a full SOP (steps, notes, review cadence) from a topic + category; editable before saving, and protected against a double-click firing two paid AI calls for the same request.
Categories 8 built-in categories plus fully-managed custom ones — add, rename, or delete at any time; deleting one reassigns its SOPs to 'Other' automatically.	Completion Tracking Each assigned team member marks an SOP as reviewed; per-SOP and team-wide completion % feed the Read Rate KPI and the SOP's own Team Progress tab.
Create Tasks from SOP Turns an SOP's steps into real Tasks in one click, idempotent — a repeat click can't multiply the task count.	Export & Share Per-SOP PDF download, plus a public read-only share-link (no login required) for sending an SOP outside the team.
Real-time Sync Create, update, and completion actions on one screen appear live on every other open session — no refresh needed.	

STEP-BY-STEP WORKFLOW

- Create an SOP directly, or generate a draft with AI from a topic — either way, ends at the same form with title, category, ordered steps, tags, and assigned team members before saving.
- Saving checks for an identical title+category first — a rapid double-click (including from 'Create SOP' on an AI-generated draft) can't create two identical SOPs.
- Each assigned team member opens the SOP and marks it complete — tracked per-member, feeding the Read Rate KPI and the Team Progress tab.
- 'Create Tasks from SOP' turns every step into a real Task in one click, idempotent against repeat clicks — tasks carry no due date, so they don't yet appear on the Calendar.
- Pin frequently-used SOPs for quick access; category tabs and KPI cards (Total/Active/Read Rate/Pinned) update live as SOPs are created, edited, or completed on any open session.
- Custom categories can be added, renamed, or deleted at any time — deleting one reassigns its SOPs to 'Other' rather than leaving them uncategorized.
- AI-Generate depends on Claude API credit being available — when the account is out of credit, it fails cleanly with a toast rather than hanging silently.

CONNECTIONS

● 📅 Team OS

Reads active team members for the assignment/mark-complete dropdowns; 'Create Tasks from SOP' broadcasts the same event Team OS's Kanban listens for, so new step-tasks appear there live.

● 📅 Task / Calendar

'Create Tasks from SOP' creates real Tasks, but they only sync to the Calendar when they carry a due date — which this flow doesn't currently set.

● 📅 App Settings

Custom category names are stored as an AppSetting key-value JSON array, the same mechanism Goals uses for its own custom categories.

This SOP is confidential and for internal use only.

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