How to Start or Create a New Project | Step-by-Step SOP

Purpose

This SOP outlines the step-by-step process for uploading a new client project. It ensures that every project is properly documented, organized, and tracked from the beginning, maintaining consistency and data security across all team members.

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1. Requirements Checklist

Before starting the project upload process, make sure you have collected the following items from the client:

- ☐ **Inspirational Website(s)** (reference links or design examples)
- ☐ **Logo** (in PNG, SVG, or vector format)
- ☐ **Content** (text, images, and any brand material)
- ☐ **Login Details** (WordPress, hosting, domain, or cPanel)
- ☐ **Total Pages and Their Names** (complete sitemap if available)
- ☐ **Any Specific Notes** (special requests, colors, fonts, or functionality)

Ensure all of these materials are complete before proceeding.

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2. Project Uploading Steps

Step 1: Create a New Project in ClickUp

- Open ClickUp and create a **new task/project**.
- Use the following naming format:
  Client Name (Country)
  (Example: John Smith (USA))
- Add the project under the appropriate workspace or list (e.g., “Active Projects”).

Step 2: Create a Folder in Google Drive

- Log in to the official **SMTP Drive account** (company-managed Google Drive).
- Create a new folder using the same name as the ClickUp project.
  (Example: John Smith (USA))
- Copy the folder link and paste it in the **ClickUp Description section** — as shown in the reference photo.
- This folder will contain **all client files, media, and communication records.**

Step 3: Collect and Upload All Client Data

- Take **screenshots of all client chats**, including conversion and order chat.
- **Download all images, videos, documents, and other files** shared by the client.
- Upload everything to the client's folder in the **SMTP Drive account**.
- Double-check that all files are uploaded correctly and organized in labeled subfolders (e.g., "Logo," "Content," "References").

Step 4: Create a Subdomain for the Project

- Create a **new subdomain** using the same name used in ClickUp.
  (Example: johnsmith.youragencydomain.com)
- Upload the project files or WordPress installation to this subdomain.
- Paste the subdomain link in the **ClickUp Description section** below the Drive folder link (as shown in the reference photo).

Step 5: Add Client Login Details

- Add the **client's login credentials** (WordPress, hosting, or domain) to the **Client Login List** spreadsheet or document.
- Ensure the credentials are stored securely and accurately.

Step 6: Add Inspirational Website Links

- At the bottom of the ClickUp description section, paste the **inspirational website links** shared by the client.
- Follow the same structure shown in the reference photo to maintain consistency.

Step 7: Update Discord Activity Section

- Go to the **Discord Activity channel**.
- Send all important links that are difficult to copy from screenshots (e.g., Drive folder, subdomain, or project file links).
- If a meeting was held with the client, also send the **meeting link and notes** to the Discord Activity section for tracking.

Step 8: Update Project Information in ClickUp

- Update the **order date** in ClickUp if the order is still in progress.
- Set the **priority tag** following the **Order Tag SOP.**
- Update the **status** of the project according to the **Order Status SOP.**

Important Notes

- Always use the same **description format** inside ClickUp as shown in the reference image.
- Ensure all uploaded materials are stored under the official **SMTP Drive account** only.
- Maintain a professional and organized structure for every project — no personal accounts or local storage should be used.
- Double-check all links (Drive, subdomain, etc.) before marking the project as uploaded.

Revision #1
Created 1 November 2025 13:47:34 by Jehanzaib
Updated 1 November 2025 13:47:34 by Jehanzaib