

SOP – Project Delivery, Revisions, Acceptance & Closure

? Objective

The objective of this SOP is to create a clear, role-based system to handle the full project lifecycle from delivery to closure. This includes delivery, revisions, changes, acceptance, review, and final closure or archiving. The goal is to ensure projects are completed cleanly, tracked correctly, and closed only by the Project Closer.

? Scope

This SOP applies to all Fiverr website projects handled using Discord client threads, Carl Bot tags, and the ClickUp CRM. No project is exempt from this flow.

Here is the complete tag list that we have right now :

1.3star, 1.7star, 1star, 2.3star, 2.7star, 2star, 3.3star, 3.7star, 3star, 4.3star, 4.7star, 4star, 5star, autoaccept, awaiting_deliveryapproval, changes1, changes10, changes2, changes3, changes4, changes5, changes6, changes7, changes8, changes9, deliverfinal, delivernodomain, deliverreturn, deliverscope, deliversubdomain, negative, pendinginfo, positive, projectclosed_reviewdone, projectclosed_reviewleft1, projectclosed_reviewleft2, projectclosed_reviewleft3, reviewleft, transfer, transfer_complete

? Roles & Authority

The Project Manager is responsible for delivering projects, communicating with the client, and triggering delivery-related Carl Bot tags. The Project Manager is not allowed to close projects.

The Completion Facilitator is responsible for handling revisions and coordinating client changes. The Completion Facilitator notifies changes using Carl Bot tags and works alongside the Project Manager or Project Closer depending on shift timing. The Completion Facilitator is not allowed to close projects.

The Project Closer is the only role authorized to close projects. The Project Closer handles acceptance confirmation, review verification, archiving decisions, and has final authority over project status.

Developers are never allowed to close projects. Completion Facilitators are never allowed to close projects.

? Standard Project Flow (Must Be Followed in Order)

1?? Delivery Stage

Once the agreed project scope has been completed, delivery must be logged inside the Discord client thread using exactly one correct Carl Bot scenario tag. Delivery can be logged by the Project Manager, Completion Facilitator, or Project Closer.

The correct tags must be selected based on the scenario. The deliverfinal tag is used when the final delivery is complete and no further changes are expected. The deliverscope tag is used when the first delivery is complete and revisions are expected. The delivernodomain tag is used when the client does not yet have domain or hosting. The deliverstaging tag is used when the client has an existing live website and a preview or staging link is used. The deliverbackup tag is used when

transfer is blocked and a backup has been secured. The `deliverautocomplete` tag is used when Fiverr auto-completes the order. The `deliverreturn` tag is used when a client returns after a long period of inactivity.

Only one delivery tag is allowed per delivery event. Scenarios must never be mixed.

2?? Revision and Changes Stage

When the client submits changes, each completed revision round must be logged using the Carl Bot change tags. These are `changes1` through `changes10`. One tag represents one completed round of changes.

Changes are notified by the Completion Facilitator during normal operations and by the Project Closer during handover or overlap timing between shifts. Free-text change updates are not allowed, and revision numbers must never be skipped.

3?? Confirmation Stage

Before any final re-delivery, the client must confirm whether additional changes are required. Re-delivery is not allowed without this confirmation.

4?? Acceptance Stage

When the client accepts the delivery but has not yet left a review, the `reviewleft` Carl Bot tag must be used. This places the project into review follow-up mode and signals that the delivery has been accepted.

5?? Review Stage

When the client submits a review, the exact rating must be logged using the appropriate Carl Bot tag. Examples include 5star, 4.7star, 4.3star, 3star, and other relevant rating tags. Logging the exact rating is mandatory for reporting, accountability, and internal analytics.

6?? Project Closure Stage

Projects may be closed only by the Project Closer. Before closing, the Project Closer must verify that a delivery tag exists, all changes have been completed, and acceptance or review status has been logged.

Once verified, the Project Closer updates the project status in ClickUp from Delivered to Completed. The Project Closer must also ensure that the Discord thread clearly shows either a rating tag or the reviewleft tag. No other role is permitted to close a project.

7?? Archiving Scenarios

Archiving is handled only by the Project Closer and is used when a client disappears, when transfer is delayed long-term, or when a project is completed but inactive. The correct tags for archiving scenarios are deliverbackup, deliverautocomplete, and deliverreturn. In all archiving cases, a full backup must be secured internally.

?? Strict Rules (Non-Negotiable)

Free-text status updates are not allowed. Projects must not be closed by the Project Manager or Completion Facilitator. Incorrect scenario tags must not be used. No steps in this SOP may be skipped.

Discord serves as the activity log. Carl Bot is the factual record. ClickUp is the system for execution and final closure.

Revision #3

Created 26 December 2025 11:25:32 by Jehanzaib

Updated 26 December 2025 11:30:31 by Jehanzaib