SOPIFY.AI
(888) 299-4196

This handy guide is here to help you navigate SOPIFY.AI with ease

Prerequisites

- Supported Browsers: Chrome, Edge, Firefox, Opera & Safari(All browsers are preferred to have the latest versions |
- Computer Microphone & Webcam Must be of working order
- Please make sure you have sufficient and Stable Internet connection
- Browser Permissions: Audio, camera, local storage must be turned to enabled
- While there is no strict maximum file size for SOP uploads, we recommend keeping each SOP under 500MB

SOP Workflow

Create SOP → Processing (1-3 mins) → Draft → Review → In Review → Approve → Published
How to Upload an SOP

1. Navigate to Upload SOP from SOPs menu
2. Select MP4 video file (recommended 500 MB)
3. Initiate upload and monitor progress
4. Clear browser cache if upload fails
5. System processes file (Processing → Draft state)
6. Access Draft to view, edit, review, approve, and download SOP

How to Record an SOP

1. Navigate to Record SOP from SOPs menu
2. Grant browser audio and camera permissions
3. Begin recording and speak clearly
4. Capture at least 2 screenshots during recording
5. Document minimum 3 steps with clear descriptions
6. Submit recording - system processes and creates Draft SOP
7. Access Draft to view, edit, review, approve, and download SOP

How to Create a Playbook

1. Click 'Add Playbook' from Playbooks menu
2. Enter Playbook Name and Description
3. Select Associated SOPs from available list
4. Click 'Create' | Edit: Update name, description, SOPs | Delete: Remove playbook (SOPs remain)

How to Create a Department

1. Click 'Add Department' from Departments menu
2. Enter Department Name and Description

Need a hand? Our support team is here to help anytime at support@sopify.ai

3. Assign Playbooks to this department (optional)
4. Click 'Create' | Edit: Update details or playbooks | Delete: Remove department (playbooks remain)

Default Roles (Auto-Created)

1. Workspace Admin - Full control over everything
2. QA Reviewer - Review and approve SOPs
3. Content Manager - Create and edit content
4. Trainer - Deliver training using SOPs
5. Viewer - View content only

How to Create Custom Roles

1. Click 'Add New Role' from Roles menu
2. Enter Role Name and Description
3. Customize Permissions (Create SOPs, Edit SOPs, Delete SOPs, Manage Users, Approve Content, etc.)
4. Click 'Create' | Edit: Adjust permissions | Delete: Remove custom roles

How to Create Users

1. Click 'Add New User' from Users menu
2. Enter Email Address, select Department
3. Select Role and assign Playbooks
4. Click 'Create' - system sends invite email
5. Edit: Change role/department | Send Email: Resend invite | Delete: Remove user

How to Use Help & Support

1. Click Help & Support menu (available to all users)
2. Four options: Report a Technical Issue, Request a Feature, Request Support / Ask a Question, Share Feedback
3. Select option type and describe your issue/request
4. Click 'Submit' - workspace admin reviews in Feedback List

Feedback List

1. Workspace Admin: See workspace feedback in table (submitter, type, description, date, status)

Settings

1. Profile Tab: Click to upload profile picture
2. Security Tab: Change Password - enter current password, new password, confirm, and save.