## SOP Template

| Company Name | Process Name | Date Created | Revision Number |
|---|---|---|---|
| One Touch Automation | Site Audit - Trim | 5/14/24 | V2 |

### Process Frequency (Daily/Weekly/Monthly/Project Based)

**Project Based**

### Process Description

Describes the process for the on-site audit for the trim phase.

| Who's Involved | | What are the inputs? |
|---|---|---|
| **Name** | **Department or Function** | **Documents, SOW, Approval, Labor, Software, Etc.** |
| Project Manager | Project Manager | Monday.com, Google Drive, ToDoist, D-Tools, QB Time |
| | | Trim design package |
| | | |
| | | |
| | | |

### What are the sequential steps?

| Step Description | Who is Responsible? |
|---|---|
| ***PRIOR TO AUDIT*** | |
| In Google Drive, in the client folder, copy all Rough-In documentation to the "4_Trim Audit" folder. | Project Manager |
| Schedule site audit from project PM in QB Time | Project Manager |
| On your iPad, in "PDF Expert", save that folder for offline use. | Project Manager |
| | |
| ***ON-SITE AUDIT*** | |
| On the iPad, open PDF Expert and select the Trim audit folder in the site audits folder. | Project Manager |
| Perform trim site audit (use checklist for items to inspect) | Project Manager |
| While auditing, mark up the documentation as you perform the walkthrough **(See Note Below)** | Project Manager |
|    - Marked with RED = Not Completed | Project Manager |
|    - Marked with GREEN = Completed | Project Manager |
| | |
| ***POST AUDIT*** | |
| Update task list (if needed) | Project Manager |
| Update RFI list (if needed) | Project Manager |
| Update Monday.com status | Project Manager |
| | |
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### What are the outputs [Defined Standards of Completion or Deliverables]

| |
|---|
| Site audit has been completed |
| Punchlist has been updated (if applicable) |
| Monday.com project status has been marked as completed |
| |

### Who does the process transfer to next?

| Name | Department or Function | Milestone |
|---|---|---|
| Project Manager | Project Manager | Schedule Trim Punchlist |
| Donna | Office Manager | Payment Request |
| Melissa | Warehouse | Finish Product Ordering |