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

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