Residential Project Material Management

Version: 2
Approved: May, 2023
Author: Rio Astiz

Policy Number: SOP-RO-001
File Name: SOP_RO_001 Resi
Project Material Management_v2

1. Purpose

This SOP establishes a standardized process for managing materials used in residential projects. The main goal of this SOP is to ensure that Solar Gain has an accurate accounting of material costs for each job. This system streamlines the process to reduce paperwork thereby increasing efficiency and accuracy of recordkeeping.

2. Responsibilities

Residential Project Material Management relevant roles and primary responsibilities.

- Project Managers (PM)

    o Provide job specific material requirements to warehouse manager.

- Crew Lead (Lead)

    o Track material use during job.

- Warehouse Manager (WM)

    o Order materials (general and job specific)
    o Audit material use (general and job specific)
    o Provide pull tickets and material requisition forms to accounting.

3. Procedure and Work Instructions

1. Project specific materials

General outline for ordering project specific materials. A separate outline from general material ordering and management.

    a. PM provides project bill of material and project budget to WM via email.
    b. WM orders project specific materials.
    c. WM compares material costs to project budget and informs PM of any overrun.
    d. WM organizes project specific materials into project bins and project shelves.
    e. Lead gathers materials for transfer to jobsite
    f. WM provides project specific material costs to accounting.

2. General project materials (Mobile materials trailer)

General outline for using and tracking general materials when used from the mobile material trailer. A separate outline from specific material use.

    a. WM orders general project materials and stocks mobile materials trailer.
    b. Lead uses general project materials from mobile materials trailer.
    c. Lead tracks general material use for the project.
    d. Lead provides material tracking list to WM upon:
        i. Friday end-of-day when job spans the weekend.
        ii. End of day upon job completion.
    e. WM reviews material tracking list and enters it into MRF to prepare material costs.
    f. WM sends MRF to accounting for review.
    g. WM completes weekly audits of material usage from mobile trailer using tracking lists provided by leads as reference.

4. Alternative steps

When the mobile materials trailer is not used for a residential project and general materials are taken directly from the warehouse, the following steps apply.

1. General project materials (Warehouse materials)

An alternate outline used when materials are taken directly from the warehouse.

   a. WM orders general project materials and stocks warehouse
   b. Lead informs WM of unavailability of mobile materials trailer and confirms usable general materials.
   c. Lead gathers general materials from warehouse.
   d. Lead tracks general material use for the job.
   e. Lead provides material tracking list to WM upon:
      i. Friday end-of-day when job spans the weekend.
      ii. End of day upon job completion.
   f. WM reviews tracking list and enters it into MRF to run job costs.
   g. WM sends costs report to accounting for review.
   h. WM completes weekly audits of material usage from warehouse using tracking lists provided by leads as reference.

5. Definitions and Acronyms

Definitions:

- **Mobile Material Trailer:** A mobile trailer that is stocked and audited weekly by the WM. This trailer holds general purpose materials that are to be used and tracked on residential projects.

- **Warehouse pull/MRF:** Material Requisition Form, used when the warehouse gathers a material list with quantities and associated costs to generate a total cost. Used to assemble and track costs.

- **Bill of material:** A list of Job Specific materials to be ordered for a job by the warehouse manager.

- **Bin & rack:** A physical bin, or rack on a shelf in the warehouse with a clear label of its associated job, used to help field crew identify which job material is assigned to.

- **Project specific materials:** High cost, unique items specific to a project. Items tracked upon ordering.

- **General materials:** Low cost, bulk materials used across jobs. Items tracked by usage reports and audits.

Acronyms:

- **PM:** Project Manager

- **Lead:** Crew leader

- **WM:** Warehouse Manager

- **MRF:** Material Requisition form

6. Appendices and Documentation

- **Bill of material:** a list provided by PMs to WM, no standardized form, typically provided by email.

- **Residential Material Tracker:** Example of a template for Lead use to track materials used on a job. *To be attached.*

- **MRF report example:** Example of a MRF report for reference, file name REF_RPM_001 MRF Example_5-1-23.

- **Flowchart:** A flowchart outlining the Material Management Process.

7. References

1. Mark Mas | Warehouse Manager
    a. Primary source of information for: SOP-RPM-001 Version 1
    b. Primary source for purpose

8. Revision History

1. Version 1:

    a. Author: [Rio Astiz]
    b. Approval Date: May, 2023
    c. Approver: [Mark Mas]
    d. Changes
        i. Finalized document.
    e. Rationale behind Changes
        i. Initial documentation.

2. Version 2:

    a. Author: [Rio Astiz]
    b. Approval Date: May, 2023
    c. Approver: [Mark Mas]
    d. Changes
        i. Adjusting hyperlinks.

9. Approval Signature

Mark Mas (May 31, 2023 17:10 PDT)   May 31, 2023

Mark Mas, Warehouse Manager

SOP_RO_001 Resi Project Material Management_v2

Final Audit Report   2023-06-01

Created:	2023-05-31
By:	Rio Astiz (rio.astiz@solargaininc.com)
Status:	Signed
Transaction ID:	CBJCHBCAABAAlLmixYpm1vzkTwgIxVp17mKgauJ8Ioei

"SOP_RO_001 Resi Project Material Management_v2" History

📄 Document created by Rio Astiz (rio.astiz@solargaininc.com)
2023-05-31 - 8:13:50 PM GMT

✉️ Document emailed to Mark Mas (mark.mas@solargaininc.com) for signature
2023-05-31 - 8:14:23 PM GMT

📄 Email viewed by Mark Mas (mark.mas@solargaininc.com)
2023-06-01 - 0:10:19 AM GMT

🖊️ Document e-signed by Mark Mas (mark.mas@solargaininc.com)
Signature Date: 2023-06-01 - 0:10:29 AM GMT - Time Source: server

✅ Agreement completed.
2023-06-01 - 0:10:29 AM GMT