# 01 Enquiries and customer requirements

SOP [BUSINESS CODE] 01 | Revision [REVISION]

Responsible person: Owner or assigned administrator
Start condition: A new enquiry arrives

## Work sequence

1. Create a unique enquiry or job reference. Record customer name, contact details, location, enquiry date, source and the requested product or service.

2. Collect photographs, approximate dimensions, quantity, intended use, preferred style, finish, budget guidance, access restrictions and desired completion date. Separate customer estimates from site verified dimensions.

3. Ask whether the item is a gate, guardrail, load bearing cover, structure or repair with safety implications. Refer design dependent work to the owner before promising a specification or price.

4. Explain the next step: preliminary estimate, paid assessment or drawing review. State what information is still needed and agree a follow up date.

5. Save messages and attachments in the job record. Record the next action and responsible person; close duplicate enquiries by cross referencing the retained record.

## Release hold point

Customer requirements and next action are recorded. No unsupported delivery or performance promise has been made.

## Required records

Enquiry record, photos, correspondence and assessment booking.

Release by: _____ Date: _____ Job reference: _____

# Form 03 Prework and inspection record

Job reference: _____ Task and location: _____
Lead: _____ Date and time: _____

## Prework release

☐ Task and drawing understood by assigned staff

☐ Operators competent and equipment checks complete

☐ PPE, guarding, support and access controls suitable

☐ Fume, coating and chemical hazards assessed and controlled

☐ Hot work authorization and fire watch arranged where required

☐ Handling and lifting plan suitable for this task

☐ Emergency arrangements and stop work authority understood

Permit or plan references and fire watch duration where applicable: _____
_____
Unresolved hazards and action: _____
Prework release by and time: _____

## Inspection evidence

| Feature and requirement | Actual result or evidence | Pass or fail |
|---|---|---|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

Defect or report reference: _____
Correction and reinspection result: _____
_____
Inspector and date: _____ Release or hold: _____