

PROJECT ORDER

Any order which has a value exceeding \$50,000, requires special considerations (ratings, engineering, or on-site testing), or phased deliveries.

RESEARCH | QUOTING

Minimum Lead Time for all Projects is 6 WEEKS

- SALES opens a Salesforce OPPORTUNITY
- [OPTIONAL] SALES to send specifications to R&D to review prior to pricing to determine if product ratings, testing requirements and special considerations can be met. R&D to review and advise on any special requirements within 1 business day.
- SALES to provide ESTIMATING with architectural drawings and a completed specification sheet for quantity takeoff and quoting. ESTIMATING to return quote 3 business days prior to bid due date.
- SALES submit for pricing to PRESIDENT, DIR. SALES, MANAGER and PROJECT COORDINATOR in Chatter – includes
 - Project Information PDF
 - Project Specifications
 - LIST quote PDF

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OPPORTUNITY RECORD TYPE – Non Forecast Quotes
 TYPE – Project or Project w/Install
 STAGE – Research or Quoting
 CLOSE DATE – Project Award date

- SALES uploads all documents to Notes & Attachments, Logs calls, sets Tasks (Next Step) and email

PROJECT WITH INSTALLATION

- SALES to consult with INSTALL regarding project installation requirements to obtain pricing.

SALES obtains Letter of Intent or verification of Project Award

- SALES to submit shop drawing request forms to R&D – Allow a maximum of 5 business days
- SALES to submit Credit Application to ACCOUNTS RECEIVABLE

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OPPORTUNITY – Change to Single FORECAST CATEGORY – Commit
 CLOSE DATE – Projected order placement(s)

PROJECT MASTER FILE contents include:

- Copy of initialed and signed MASTER QUOTE
 OR
 MASTER Quote No. indicated in the Contract / PO and a copy of the MASTER QUOTE

PROJECT INFORMATION

- Job Site delivery address, postal code, map (if required)
- Copy of Contract – Duly signed (PRESIDENT & CUSTOMER/GC)
 (Production can proceed while awaiting contract sign off back from CUSTOMER/GC)
- Shop drawings – signed by CUSTOMER/GC and ARCHITECT
- Onsite Testing – Provide Company and Contact information
- Mock up Request
- Price Requests
- Changes / Addendums prior to Contract award
- Custom Product Approval
- Storage charges – Site trailer
- Extraordinary delivery conditions

CONTACTS – Name, phone number(s) and email

- Release for Production
- Job Site Delivery

CX QUOTE

- SALES to select P (Project) or PI (Project – install) as order type in DQ360
- SALES to ensure correct Project Name is used for all orders

SALES e-mails MASTER FILE info to;
orderbundle@durabuiltwindows.com
accounting@durabuiltwindows.com

MASTER FILE ORDER INFORMATION

- ACCOUNTING creates Master File No. (M17-XXXX)
- Sales to enter Master File No. in DQ PO field on all ORDER submissions
- ACCOUNTING manages the MASTER FILE and invoices CUSTOMER based on Contract and shipping dates

PROJECT MEETING

SCHEDULING calls a Project Meeting, includes SALES and PROJECT COORDINATOR

- Group reviews Project Specifications, Quote, Delivery etc.
- Confirm Order breakout details – with tentative time line

PROJECT WITH INSTALLATION

- INSTALL attends PROJECT MEETING
- INSTALL and SCHEDULING determines installation dates with CUSTOMER
- SALES to acquire sign offs from PROJECT MANAGER – gives sign off to ACCOUNTS RECEIVABLE to initiate invoicing

- SALES submits all individual orders to ACCOUNTING for review and logging
- ACCOUNTING to include Master File No. on all ORDERS
- PROJECT COORDINATOR submits ORDER FILE to SCHEDULING

SCHEDULING and SHIPPING WORKFLOW – Same as STANDARD ORDER WORKFLOW

ORDER CHANGES

- Changes to be submitted in writing (Change Order, Addendum) with price / costs information
- If change approved – Upload ORDER with changes and re-submit ORDER BUNDLE (include Master File No.)
- Add all information to the MASTER FILE

