

WORKFLOW



PROJECT INFORMATION

Fill out and post in Chatter or upload to Notes & Attachments

February 2019

Date Submitted

Opportunity Name

Account Name

Leave blank if bidding multiple GC's

Window Quantities Supply Only

Door Quantities Supply & Install

Patio Door Quantities Anticipated Delivery

Other Quantities

Explain Other

TOTAL Quantities

PROJECT TYPE

Multi-family - New High Rise

Multi-family - Reno Social Housing

Gov't / Institutional Other

Architect

Envelope Engineer

Owner

Site Testing Check if Yes

Bidding GC Names

PRE-QUOTE CHECKLIST [Leave blank if N/A]

Salesforce Opportunity created

Drawings reviewed – uploaded to Notes & Attachments

Specifications reviewed – uploaded to Notes & Attachments

Addendums / supplemental instructions reviewed – uploaded to Notes & Attachments

Quantity takeoff by

Quantity check by

Shipping / Site trailer discussed w/ Shipping

Installation Scope of Work and pricing discussed with Install

Custom product / special order approvals

R&D review for Vivacé Project

NAFS Rating specified – Do we meet / exceed?

NAFS calculator – Do we meet / exceed?

Customer informed of NAFS calculator if NAFS not specified.

Heel beading required (interior glazed windows)

Reinforcement required

Specifications (Attached PDF can be posted in Chatter, or uploaded to Notes & Attachments, with this form in lieu of filling out this box)

DISCOUNT FACTOR

Date Returned

Windows Installation

Doors Other

Patio Door

Comments