

WORKFLOW

PROJECT ORDER

Order with a contract and special considerations – specifications, ratings, engineering, on-site testing, phased deliveries.

October 2019

salesforce

RESEARCH | QUOTING

MIN. LEAD TIME – 6 WEEKS FROM PROJECT MEETING

- SALES opens a Salesforce OPPORTUNITY – including Project Description
- [OPTIONAL] SALES to call a pre-tender meeting – discuss specifications, special considerations etc. prior to proceeding with quote
- SALES to open an Order Desk CASE for estimation and submit a completed specification sheet for quantity takeoff and quoting. Allow for a minimum of a two (2) business day for completion
- PROJECT W/ INSTALLATION** – SALES to consult with INSTALLATION to review scope of work and confirm pricing
- SALES posts in Chatter @PRESIDENT, DIR. SALES, MANAGER and PROJECT COORDINATOR – attach;
 Price reply **2 DAYS**
- Project Information PDF
- LIST price Quote PDF

OPPORTUNITY MANAGEMENT

- RECORD TYPE = Non-Forecast Quotes
- TYPE = Project or Project w/ Installation,
- CLOSE DATE / STAGE = Research = Tender Date
- CLOSE DATE / STAGE = Quoting = Award Date
- SALES uploads drawings, specs, addendums to Notes & Attachments
- SALES adds all Opportunity contacts / influencers in Contact Roles
- Logs calls, sets Tasks and keep company informed through Chatter

SALES – LOI / PROJECT AWARD RECEIVED

- SALES send Customer Engagement letter – sets expectations / process
- SALES submits shop drawing request forms to R&D **5 DAYS**
 - Submit up to two (2) revisions w/o addition charge **2 DAYS**
- SALES to submit Credit Application to ACCOUNTS RECEIVABLE **5 DAYS**

- OPPORTUNITY RECORD TYPE = Single
- FORECAST CATEGORY = Commit
- CLOSE DATE = Projected order date(s)
- Not Awarded – Change STAGE = Closed Lost, provide reason and post on Chatter @ PRESIDENT, DIR. SALES, MANAGER and PROJECT COORDINATOR

PROJECT MASTER FILE

5 DAYS

- SALES (BU LEADER & AM) responsible for collecting all Project Master File information and submission to the PROJECT COORDINATOR
- Copy of initialed and signed MASTER QUOTE – OR – Email from Customer indicating acceptance of the MASTER QUOTE

CONTRACT REVIEW

- SALES to review / provide feedback and forwards to to PRESIDENT EXEC ASSISTANT for review and sign off
- Durabuilt conditions added to the contract and duly signed
 - No unapproved back charges
 - No charges for project delays

PROJECT INFORMATION

- Master File cover sheet
- Job Site delivery address, postal code, Site Map
- Copy of Contract – Duly signed (PRESIDENT & CUSTOMER/GC)
- Shop drawings – signed by CUSTOMER/GC and ARCHITECT
- Onsite Testing – Provide Company and Contact information
- NAFS requirements per spec, or NAFS calculator
- Changes / Addendums prior to Contract Award
- Mock up Request
- Storage charges / Site trailers / extraordinary delivery conditions

CONTACTS – Name, phone number(s) and email

- Release for Production
- Job Site Delivery
 - ACCOUNTING creates Master File No. (M19-XXXX)
 - SALES to enter Master File No. in CX Project Name on all ORDER submissions
 - ACCOUNTING manages the MASTER FILE and invoices CUSTOMER based on Contract and shipping dates

- SALES e-mails MASTER FILE information to;
accounting@durabuiltwindows.com
sanjivk@durabuiltwindows.com for EDM or
raymondh@durabuiltwindows.com for Branches
- SALES uploads MASTER FILE to Notes & Attachment – single PDF
- ACCOUNTING posts Chatter with Master File No.

PROJECT MEETING

PROJECT COORDINATOR calls a Project Meeting, includes SCHEDULING, SALES, INSTALL (if required) and EXECUTIVE (Sunny - \$100k+, Amar \$250k+) and others (Shipping, Purchasing) if required; Group reviews the following;

- Master File
- Quote
- Rating requirements – NAFS, on-site testing
- Special material requirements
- Shipping requirements – Site Map , Order breakout details w/ tentative timeline
- PROJECT W/ INSTALLATION** - Confirm scope of work, site contacts, installation schedule

- PROJECT COORDINATOR produces Meeting Minutes – USE Project Meeting Minutes template
- Attach Minutes in Opportunity, email to all attendees

ORDER CHANGES

- Changes to be submitted in writing (Change Order, Addendum) with price / costs information
- If change approved – follow CHANGE ORDER PROCESS
- Add all information to the MASTER FILE

- SALES submits all individual orders to ACCOUNTING for review and logging
- ACCOUNTING to include Master File No. on all ORDERS
- Includes;
 - Credit app
 - Sales Recap
 - Signed Contract
 - WCB
 - Statutory Declaration
 - PROJECT COORDINATOR submits ORDER FILE to SCHEDULING