

# Materials in the Sales Folder

1. Sales Release
  - a. Finalized materials list
  - b. Climate zone, floor loads, roof loads
  - c. Occupancy Type
  - d. WUI compliance
  - e. Building address
  - f. Sprinkler system requirements
  - g. Set type
2. Building Order Sheet
  - a. Building price
  - b. Options taken
  - c. Redline Change Orders taken
  - d. Special materials
  - e. PO Number
  - f. Mod size
3. Change Orders
  - a. Redline Change orders accepted in the main page of folder.
  - b. Redline Change orders will also be shown on the building order sheet.
4. Dealer PO
  - a. If PMSI, will often match Building Order Sheet.
  - b. If MMG or another company, less likely to match the Building Order Sheet if Redline Change Orders have occurred.
5. Sub & Material Bids
  - a. Material pricing conversations
  - b. Cut sheets
  - c. Quotes
6. Bid Specs
  - a. Typically more for government jobs but sometimes just a scope of work from the customer.

- b. Could contain specs, scope of work, Q&A, and additional materials.
- 7. Floor Plan
  - a. Baseline drawings bid is based on.
  - b. Design combines the floor plan with the sales release to start drawing.
- 8. BOM
  - a. This contains the quote.
  - b. The Sales Release is of higher importance but the quote contains exclusions that should be visited if there is ambiguity in scope.
- 9. Internal Calculations
  - a. Heat/Cool Calc
  - b. Occupancy Calc
  - c. Estimated Electrical Calcs
  - d. Miscellaneous cost calculations
- 10. Correspondence
  - a. Discussions with customer and internal teams.

## Sales Material Order of Importance

1. Sales Release
2. Building Order Sheet
3. Redline Change Orders
4. Quote Exclusions
5. Customer Correspondence
6. Specifications Q&A documents
7. Specifications Document
8. Statement of Work
9. Customer Supplied Drawings & Floor Plans
10. Cut Sheets
11. Sub & Material Conversations
12. Customer PO