

Procedures for quoting and sales releases

1. Schedules/Schedule request's
 - A. When requesting a proposed schedule as well as an official schedule for an order, please make sure **to let the GM know when the customer wants the building.** We may or may not be able to accommodate them but at least we know what they want and can shoot for that.
 - B. Provide long lead information.
 - C. Provide anticipated po date.
 - D. Provide info that it is TTP (or any other conditions that may affect scheduling like sprinklers).
2. Quoting
 - A. Thoroughly review quote. Immediately send out special items to obtain pricing. (make sure to obtain lead times and cut sheets)
 - B. Submit any questions that you have to the dealer (if the dealer is hard to reach please don't be afraid to try them on their cell phone). Let them know when they need to respond in order to meet their requested quote date.
 - C. Review (as necessary) the project with Greg Berry or your engineering manager in regard to code compliance and any structural issues you may have.
 - D. When quote is completed -review thoroughly. (Sales Manager) will approve all quotes prior to sending them to the customer (unless specifically addressed otherwise). (up to a \$800,000.00) All quotes
 - E. Over the 800K. and less than 3 million need to be reviewed by V.P. of Sales.
3. Sales Releases
 - A. Fill out all Sales Release documents thoroughly (building order sheet, sales releases, color selection forms, and long lead forms).
 - B. Eliminate all unnecessary paperwork from your release. If you have paperwork that could possibly be utilized in the future, then staple it together and indicate "not used" on that particular group.
 - C. Make sure all special material quotes and cut sheets are in order and in the release package.
 - D. Make sure that all pricing work ups including options are in your release.
 - E. Make sure that you keep all communication/correspondence documentation up to date in the file.
 - F. Make sure that you obtain answers on all dealer related questions (ie., type of set, elevation, site address, etc.) as soon as possible. If you are having a hard time obtaining info, let the dealer know that it could possibly affect their off line date.
 - G. Provide (via e-mail) information to GM (sub contractor name, phone number, etc.) for any sub coming in to do sprinklers, etc.. Please remember that GM will authorize/coordinate all work done by subs and that they will be required to submit a certificate of insurance prior to starting any work on Sunbelt Modular property.

- H. Release all quote/sales documents to your project coordinator for intercompany distribution.
4. Pre release revision/Change order forms (and red-line changes)
 - A. A pre release revision form is to be utilized on any and all changes to a unit prior to it being Final Released. Please check to make sure prior to filling out this form where the unit is at in the engineering process. If the project has been finalized then a change order must be completed. It is important to make sure and “key” all changes to a project. This enables the draftsman to complete the changes accurately and quickly. Make sure to include all necessary pricing and cut sheet documentation (including your pricing work ups) when releasing pre-release revision/change order forms to the project coordinator. **Always make sure to adjust the building order sheet when monetary changes are made to your building!**
5. Long lead forms
 - A. Make sure that all long lead items are properly included on this form.
 - B. Make sure to follow up with the dealer on obtaining long lead sign offs. If the dealer does not provide the sign offs in the allotted time, make them aware that their offline date is in jeopardy of slipping.
 - C. Once a long lead form has been submitted to purchasing, any changes to these items must be approved by the purchasing manager. If the items have been ordered and cannot be cancelled, the customer is responsible for their cost as well as any changes they require.

Communication is key to a successful project. It is your responsibility to act as the project manager for any units you sell. Please make sure to follow up on purchase orders, CSO's, color selections, long leads, etc.
If you have any adverse conditions arise, please address them immediately.