



Date: \_\_\_\_\_

## Sales to Project Coordinator Handoff

1. Estimator: \_\_\_\_\_

2. Bid Folder Number: \_\_\_\_\_

3. Building Information: \_\_\_\_\_

[Serial Number, Module Letters [EX: A-D], Project Size, Project Name]

4. Confirm that the Bid folder includes the following information:

- |   |   |
|---|---|
| <input type="checkbox"/> Purchase Order       | <input type="checkbox"/> Emails               |
| <input type="checkbox"/> Sales Release        | <input type="checkbox"/> Plans                |
| <input type="checkbox"/> Building Order Sheet | <input type="checkbox"/> Color Selection Form |
| <input type="checkbox"/> Cut Sheets           | <input type="checkbox"/> Long Lead Form       |
| <input type="checkbox"/> Vendor Quotes        |   |

5. Does this project require a Cut Sheet Manuals?      Yes      No

6. Does this project require a Physical Samples?      Yes      No

7. Does this project require a O&M Manuals?      Yes      No

8. For the foundation plan-Is the customer:

- ☐ Purchasing the Foundation Plan?
- ☐ Providing the Foundation Plan?
- ☐ Not Applicable

9. Miscellaneous Information:

a. Customer desired offline date? \_\_\_\_\_

b. Material & Mechanical Cost & Qty of Plumbing Fixtures \_\_\_\_\_

c. States for Insignia: \_\_\_\_\_

d. Dealer: \_\_\_\_\_

e. Dealer names, Contact Numbers, and Emails for Project:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

f. Dealer Location: \_\_\_\_\_

g. End Location: Address: \_\_\_\_\_

County: \_\_\_\_\_

h. Will installation be done in a city or county? \_\_\_\_\_