

# Creating Sales Orders in Praxis

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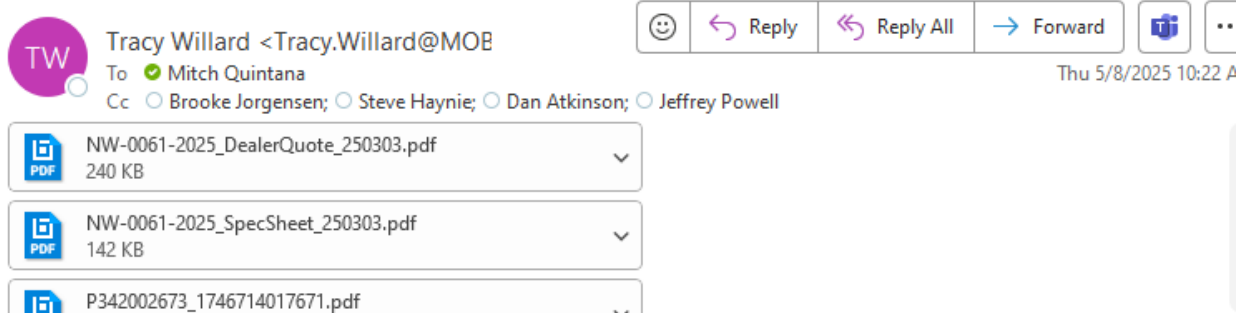
## *Outline of process:*

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- 1. Verify price matches what was quoted.*
  - 2. Discuss price with manager if quote is older than 30 days.*
  - 3. Save Purchase Order and email chain to the sales folder.*
  - 4. Mark the building as sold in Praxis.*
  - 5. Fill out the Building Order Sheet and Sales Release in Praxis.*
  - 6. Fill out the building handoff documents which include the Project Coordinator Handoff Document, Long Lead Form, and Color Selection Sheet.*
  - 7. Send the Project Coordinator Handoff Document to the Project Coordinator.*
-

1. When we receive a PO, start by verifying that the price on the PO matches what we have in Praxis. If this PO is sent via DocuSign or another document signing service, ask the sender to make the Sales Manager the signer if you are not the Manager. More commonly, you'll see a PO email like the one below:

## New Order PO R342002673 // Custom Restroom Trailer Fluor Marine Propulsion- INL 24.



Hey, Mitch.

Attached is the PO for Steve's Fluor Marine Propulsion Restroom Facility. Please let us know if you need anything else. Thanks and have a wonderful day!

**Tracy Willard**

Project Coordinator | Mobile Modular

t: 912.309.9913 | [tracy.willard@mobilemodular.com](mailto:tracy.willard@mobilemodular.com)

2. Open the PO and compare the PO price and version numbers in Praxis match the PO. In the image below the base price matches. The customer supplied the quote with the PO to verify version number. Remember that any change gets rounded to the nearest whole dollar on the quote in Praxis when printed.

The image shows two side-by-side screenshots. The left screenshot is a "Purchase Order" form from Mobile Modular Management Corporation. It includes fields for "To" (Northwest Building Systems), "Ship To" (Boise), and "Bill To" (Mobile Modular Management Corporation). It also has a table for "Product Information" with columns for Line, Description, Tax, Qty, U/M, and Unit Price. The right screenshot is the "Praxis" software interface, showing the "Estimate Entry" screen. It displays the same purchase order details, including the "Total cost for this estimate" of \$184,824.33. The interface includes various tabs like "Quote Details", "Options", and "Notes", and a "Factor Info" section on the right.

- If options were taken, verify the option price is also correct. Options also are rounded to the nearest whole dollar so the option below rounds to \$2,052 on the quote.

1 1.3

Used Plan AS BUILT\* Plan Set Ion Ready 4017671 X

025 Ver: 3

facility

READ ONLY Edit Quote New Quote Duplicate Quote

Quote Details Options Notes

Preview Dealer Quote Preview Option Pricing Sheet

Option Description Double Click to Open Expand Price Factor Factor Price

PAINTED FIBER CEMENT SKIRTING (NO SHEATHING OR FRAMING)

\$1,005.73 0.50 \$2,051.70

AND PIER FOUNDATION PLAN (ENGINEER'S STAMP ONLY)

\$1,400.00 0.00 \$1,400.00

mobile modular  
Your Partner - Our Commitment

Mobile Modular Management Corporation

Purchase Order

P.O. Number: RC  
P.O. Date:  
Account Number:

To	Ship To	Bill To
Northwest Building Systems 405 E. BOERING LANE Boise, ID 83716 Contact: Phone: (208) 362-7587 Fax: Email:	Boise 4055 South Eagleson Road Boise, ID 83705 Phone: (208) 362-7587 Fax:	Mobile Modular Management Corporation 5700 Las Positas Road Livermore, CA 94551 Accounts Payable@mmgc.com

Line	Sku#	Description	Product Information	Tax	Qty	U/M	Unit Price
1	8339	Custom 1 Floor Building		N	1	EA	\$184,824.00
2	27777	Special Custom Floor Plan		N	1	EA	\$2,052.00
3	103719	Custom 14065 INL Restroom Facility per Quote NW-0061-2025; SN 25143		N	1	EA	\$2,052.00
		Painted Fiber Cement Skirting		N	1	EA	\$2,052.00

Order Placed By

Tracy Willard  
E-mail: tracy.willard@mobilemodular.com  
Phone: (208) 362-7587  
Fax:

Approved By: \_\_\_\_\_  
Dated: \_\_\_\_\_

Special Notes

Built in accordance with the above referenced quotes & current IBC; final drawings must be submitted for MM approval. Coded for State(s): ID. Offline date is: Mid-August 2025.  
MISC's & Labels must be submitted to MMGC and are required for payment. \*PLEASE SEND HARD COPIES TO MOBILE MODULAR, ATTN: APDOCH @ 5700 LAS POSITAS ROAD, LIVERMORE CA 94551 \* \*\*Floor & Propulsion INL RR 242001191 \*\*\*

Special Terms & Important Contractual Information

The purchase order is governed by the P.O. Terms and Conditions and superseded by the Master Agreement to expedite the processing of your invoice, please email it to Accounts Payable@mmgc.com. You will need to the PO number on your invoice. If you have questions regarding payment, please email AP@mmgc.com.

- WHEN NUMBERS ARE VERIFIED AND YOU ARE READY TO CONVERT TO A SALE, ASK THE REST OF THE SALES TEAM IF THEY ARE TRYING TO ADD A PO AT THIS TIME. ONLY ONE PERSON SHOULD BE CREATING A PO AT A TIME TO BE SURE BUILDING NUMBERS LINE UP PROPERLY.
- Go to the quote folder your bid documents are saved in. Your quote folder number should be in the quote notes in Praxis.

Quote Number: NW-0061-2025 Ver: 3

esc: 14x65 INL Restroom Facility

Search Quote Quote Details Options Notes

Estimate Entry

Quote Number: NW-0061-2025 Ver: 3 of: 3

Quote Received: 21-Feb-25 Creation Date: 21-Feb-25 Date Sold:

Building Description: 14x65 INL Restroom Facility

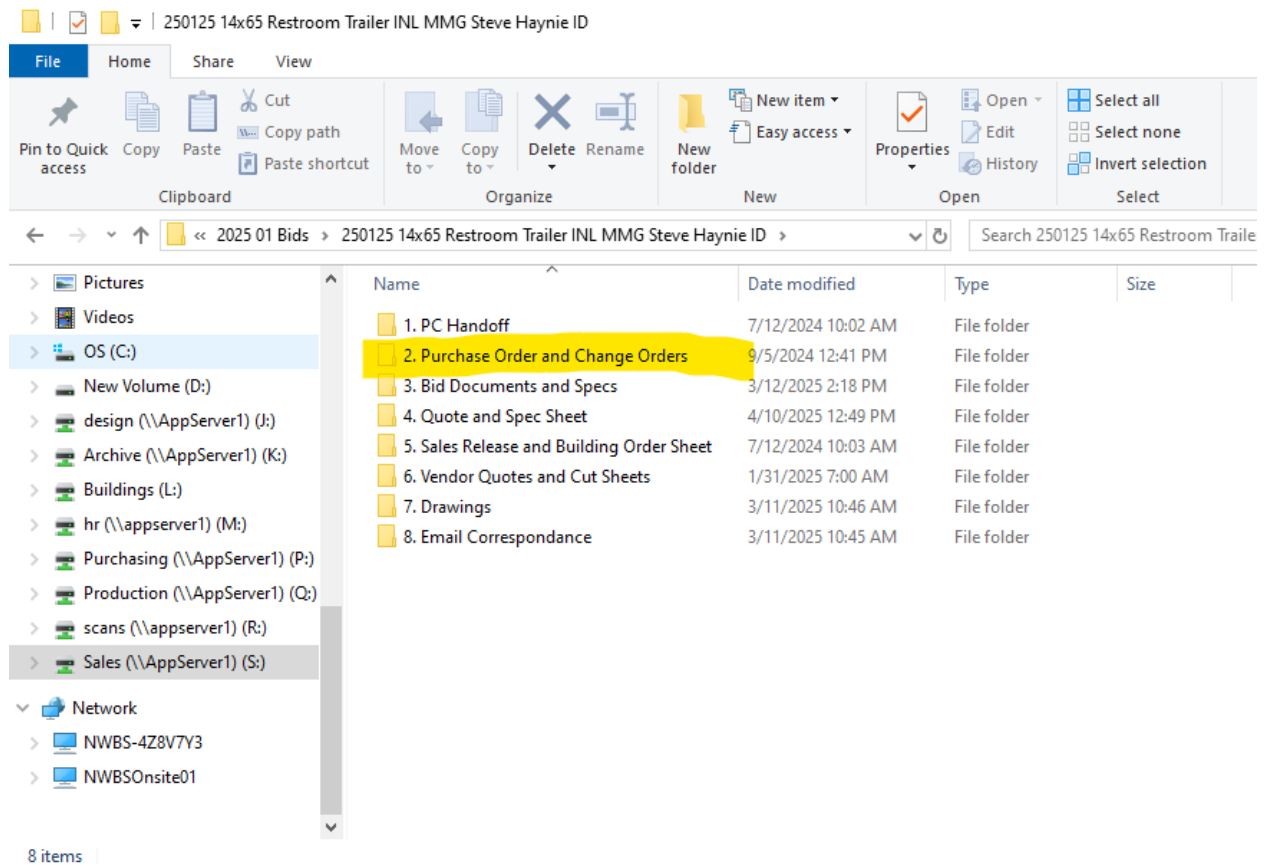
Quote Status: Open

Quote Notes: 250125

Basic information about this building

Build Type: CUSTOM Height: 44 Width: 44 Length: 65

6. Add the PO to the purchase order folder.



7. Update the Email Correspondence folder with any email communication or additional details not already stored (including the email chain the PO is on).
8. Add any building specific cut sheets in the Vendor Quotes and Cut folder.
9. **You are ready to process the PO in Praxis. Double check that the PO, and quote numbers match before proceeding!**

10. Back in Praxis, Move the quote status to sold then add the date sold.

Quote Number: NW-0061-2025 Ver: 3

Desc: 14x65 INL Restroom Facility

[Search](#) [Quote](#) [Quote Details](#) [Options](#) [Notes](#)

**Estimate Entry**

Quote Number: NW-0061-2025 Ver: 3 of 3

Quote Received: 21-Feb-25 Creation Date: 21-Feb-25 Date Sold: 08-May-25

Building Description: 14x65 INL Restroom Facility

Quote Status: **Sold**

Quote Notes: 250125

Basic information about this building

11. Press Save.

12. Add how many buildings (**\*\*NOTE WE ARE TALKING BUILDINGS AND NOT MODS\*\***) are being sold and be sure the number of serial numbers matches the number of buildings. For NWBS, number of buildings and number of serial numbers will always be the same. Number of mods doesn't matter here. Press the generate serial numbers button when entered.

Preparing Sales Release & Building Order Sheet

**Generate Serial Numbers, Sales Release & Building Order Sheet** [Quit](#)

How Many Buildings Are Being Sold? 1

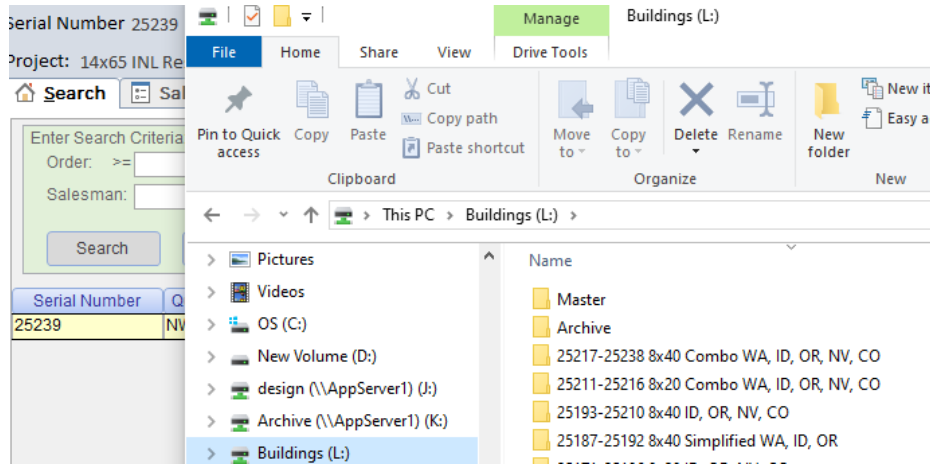
How Many Serial Numbers Do You Want To Create? 1

[Generate Serial Numbers](#)

Quote Number	Indiv SN	Serial Number	Sold	Description
NW-0061-2025			05/08/2025	14x65 INL Restroom Facility

13. Press Yes when asked if you'd like to proceed with generating a serial number.

14. Make sure the serial number matches what is expected. In the image below, 25238 is the last building number filed and the serial number given to us is 25239 which is to be expected.



15. Choose to view the Sales Release/Building Order sheets.
16. Go to the Options tab and select any options that were on the PO. Decline any options that weren't picked up.

Revised Plan ... 28 AS BUIL ... Inter Plan Set ... Option Ready ... 6/14/17/6/1

**mobile modular**  
Your Project - Our Commitment

**Mobile Modular Management Corporation**

**Purchase Order**

P.O. Number: R342002673  
P.O. Date: 05/08/2025  
Account Number: 612954

To	Ship To	Bill To
<b>Northwest Building Systems</b> 405 E. BOEING LANE Boise, ID 83716 Contact: Phone: Fax: Email:	<b>Boise</b> 4055 South Eagleson Road Boise, ID 83705 Phone: (208) 362-7587 Fax:	<b>Mobile Modular Management Corporation</b> 5700 Las Positas Road Livermore, CA 94551 Accounts Payable@mgrc.com

Line	Sku#	Description	Tax	Qty	U/M	Unit Price	Ext Total
1	8828	Custom 1 Floor Building	N	1	EA		
2	27777	Special Custom Floor Plan	N	1	EA	\$184,824.00	\$184,824.00
3	103719	Custom 14X65 INL Restroom Facility per Quote NW-0061-2025; SN 25143	N	1	EA	\$2,052.00	\$2,052.00
							<b>Total: \$186,876.00</b>

**Order Placed By**

Tracy Willard  
E-mail: tracy.willard@mobilemodular.com  
Phone: (208) 362-7587  
Fax:

**Approved By:** \_\_\_\_\_  
**Dated:** \_\_\_\_\_

Factor Price	Customer Accepted
\$2,051.70	Yes-Accept
\$1,400.00	No-Decline

17. Go to the building order sheet and click Save.

Serial Number 25239 Quote Number: NW-0061-2025 Total Price: \$186,876.00

Project: 14x65 INL Restroom Facility Customer: Mobile Modular Management Corporation

Search Sales Release Building Order Options Redlines

Serial Number: 25239 Quote Number: NW-0061-2025 Description: 14x65 INL Restroom Facility New Total: \$186,876.00

Building Type: CUSTOM Sales Rep: Mitch Quintana Date: 5/9/2025 PO Number: Project Number:

Dealer: Mobile Modular Management Corporation Dealer Branch: MOBMOD-BOISE Dealer Rep: Steve Haynie Tags: State Tags

BLDG Size: Width: 14 Length: 65 # Bldgs: 1 MOD Size: Occupancy:

Special Materials: TT&P: Sprinklers: Plumbing: Other: Other:

Schedule Information: LDs: Long Lead: Prints Due: Promised Delivery Date:

**Building Order Information:**

Material Cost:	\$85,303.59	Factor:	0.500	Factored Cost:	\$184,824.00
Waste:	.0200	Weighted Factor:	0.500	Approvals:	\$1,922.00
Engineering (Sub Con):	\$0.00	Engineering:	\$1,800.00	Service:	\$1,800.00
Contingency:	\$3,203.00	Fedex:	\$50.00	MBI Seal:	\$30.00

**Options:**

Date	Option Description	Qty	Size	Factor	Unit Price	Total Price	Import
05/09/25	O&M Submittals	1			\$2,000.00	\$2,000.00	<input checked="" type="checkbox"/>
05/09/25	NWBS SUPPLIES PAINTED FIBER CEMENT SKIR	1		0.50	\$2,052.00	\$2,052.00	<input type="checkbox"/>

Options Totals: Weighted Factor: 0.500 Price: \$4,052.00

Options: 1 of 2 No Filter Search

**Red Line Changes:**

Date	Red-line Changes	CO	Init	Factor	Price Adjust
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Redline Totals: Weighted Factor: Price:

Redlines: 0 of 0 No Filter Search

Save Print Pricing Sheet

18. Verify that the New Total matches the PO total.

Total Price: \$186,876.00

Go To Quote Quit

Mobile Modular Management Corporation

Redlines

161-2025 Description: 14x65 INL Restroom Facility New Total: \$186,876.00

tana Date: 5/9/2025 PO Number: Project Number:

Dealer Branch: MOBMOD-BOISE Dealer Rep: Steve Haynie Tags: State T

Size: Occupancy:

er: Other:

Prints Due: Promised Delivery Date:

Factor:	0.500	Factored Cost:	\$184,824.00
Weighted Factor:	0.500	Approvals:	\$1,922.00
Engineering:	\$1,800.00	Service:	\$1,800.00
Fedex:	\$50.00	MBI Seal:	\$30.00

By:

Set ... dation Ready ... 6714017671

Corporation  
5700 Las Positas Road  
Livermore, CA 94551  
Accounts.Payable@mgrc.com

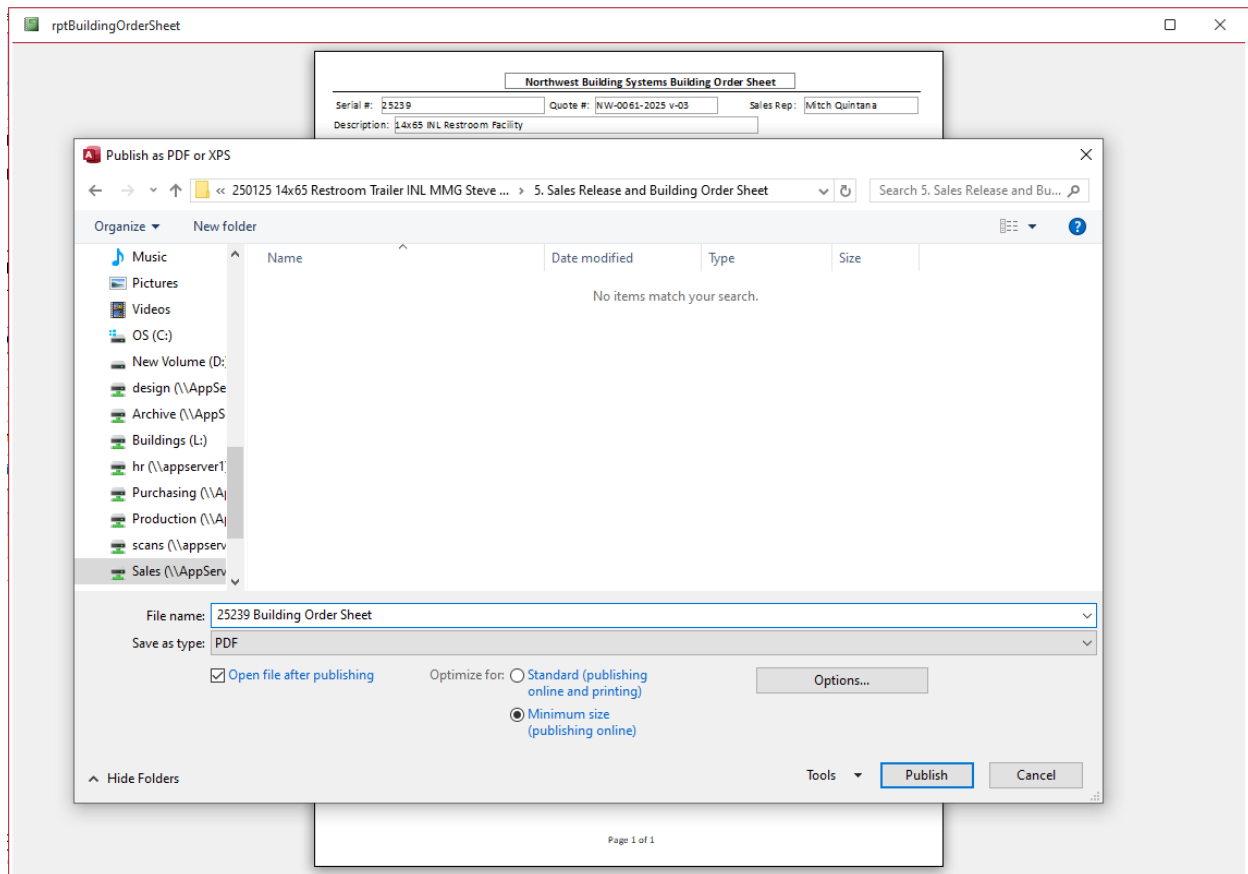
Tax	Qty	U/M	Unit Price	Ext Total
N	1	EA	\$184,824.00	\$184,824.00
N	1	EA	\$2,052.00	\$2,052.00
<b>Total:</b>				<b>\$186,876.00</b>

- a. Dealer's PO number.
- b. State tag(s)
  - i. Use CTRL+Select to pick multiple states
- c. Special Materials
- d. Mod Size
- e. Occupancy
- f. Promised delivery date.
- g. Note the longest lead time item's lead time to help purchasing.
  - ii. Also note in the email you send the team.
- h. Note special materials needed.
  - iii. TT&P
  - iv. Sprinklers
  - v. Plumbing
  - vi. Others

Serial Number: 25239		Quote Number: NW-061-2025		Description: 14x65 INL Restroom Facility		New Total: \$186,876.00	
Building Type: CUSTOM		Sales Rep: Mitch Quintana		Date: 5/9/2025		PO Number: R342002673	
Dealer: Mobile Modular Management Corporation		Dealer Branch: MOBMOD-BOISE		Dealer Rep: Steve Haynie		Project Number:	
BLDG Size: Width: 14 Length: 65 # Bldgs: 1		MOD Size: 139'		Occupancy: B		Tags: ID	
Special Materials: TT&P: <input type="checkbox"/> Sprinklers: <input type="checkbox"/> Plumbing: <input checked="" type="checkbox"/> Other: Hager 810S Overhead Drip Guard				Other: 3 Ton 15kW AC Bard W/ Economizer			
Schedule Information: LDs:		Long Lead: Bards		Prints Due:		Promised Delivery Date: Late August	
<b>Building Order Information:</b>							
Material Cost: \$85,303.59		Factor: 0.500		Factored Cost: \$184,824.00			
Waste: .0200		Weighted Factor: 0.500		Approvals: \$1,922.00			
Engineering (Sub Con): \$0.00		Engineering: \$1,800.00		Service: \$1,800.00			
Contingency: \$3,203.00		Fedex: \$50.00		MBI Seal: \$30.00			
<b>Options:</b>							
Date	Option Description	Qty	Size	Factor	Unit Price	Total Price	Import
05/09/25	O&M Submittals	1			\$2,000.00	\$2,000.00	<input checked="" type="checkbox"/>
05/09/25	NWBS SUPPLIES PAINTED FIBER CEMENT SKIR	1		0.50	\$2,052.00	\$2,052.00	<input type="checkbox"/>
<b>Red Line Changes:</b>							
Date	Red-line Changes					CO	Init
						Factor	Pri



20. When finished, print the Building Order Sheet and save it to the bid folder in sales.



21. Now move to the sales release and add as much info as possible to the sales release including:

- b. Site address.
- c. Climate zone.
- d. Floor load.
- e. Occupancy.
- f. Foundation plan (if applicable).
- g. Sprinklers (if so, are we footing the bill?)
- h. WUI compliance needed?
- i. HVAC & hitch side noted?
- j. Vendor cut sheets?

Sales Release/Building Order - Home Screen - Praxis-Estimating Application

Serial Number: 25239 Quote Number: NW-0061-2025 Total Price: \$186,876.00

Project: 14x65 INL Restroom Facility Customer: Mobile Modular Management Corporation

Search Sales Release Building Order Options Redlines

Serial Number: 25239 Quote Number: NW-0061-2025 Size: 14x65 Description: 14x65 INL Restroom Facility Date: 05/09/2025

Sales Person: Mitch Quintana Dealer: Mobile Modular Management Corporation Contact: Steve Haynie

Dealer Address 1: 4055 Eagleson Road Dealer Address 2: City: Boise State: ID Zip Code: 83705

BLDG Address 1: J3WM+WX BLDG Address 2: City: Scoville State: ID Zip Code: 83415

Climate Zone: 6 Floor Load: 50 SPCL Floor Load: Roof Load: 40# Set Type: PAD/PIERS/ABOVE GRADE SET

Occupancy: B WUI Compliant: (PMI Only) Plumbing Manifold Supplied: Sprinkler System: N/A NOTE: For All Except N/A, Provide J-Box For Riser.

Hitch/HVAC Location On Plan: Vendor Quotes (Cut Sheets Attached): Installer:

Category	SubCategory	Description	Notes	Spell Check	QTY	Instructions
EXTERIOR DOOR	LOCKSET	Panic - Grade 2			3	
EXTERIOR DOOR	HARDWARE	Closer - S Parker 900 BCAL			4	
EXTERIOR DOOR	HARDWARE	Kick Plate - 10" X 34" - Stainless Steel	Interior side of door in mens and womens bathrooms.		2	
EXTERIOR DOOR	HARDWARE	Latch Guard			4	
EXTERIOR DOOR	MISC	Hager 810S Overhead Drip Guard			3	
ELECTRICAL	PANEL	Nema 3R, External, 200 Amp Single Phase W/Main	Next to Bard.		1	
ELECTRICAL	P&C/W&V	Flow W/ Ground			363	

22. Add any material changes due to options to the Sales Release now as well. For instance, if we optioned a class A roof, I would add densdeck or change the roof covering in the Sales Release to state class A. For the example below, I am going to note 36" skirting in the Sales Release.

Serial Number: 25239 Quote Number: NW-0061-2025 Total Price: \$186,876.00

Project: 14x65 INL Restroom Facility Customer: Mobile Modular Management Corporation

Search Sales Release Building Order Options Redlines

Serial Number: 25239 Quote Number: NW-0061-2025 Size: 14x65 Description: 14x65 INL Restroom Facility Date: 05/05

Sales Person: Mitch Quintana Dealer: Mobile Modular Management Corporation Contact: Steve Haynie

Dealer Address 1: 4055 Eagleson Road Dealer Address 2: City: Boise State: ID Zip Code: 83

BLDG Address 1: J3WM+WX BLDG Address 2: City: Scoville State: ID Zip Code: 83

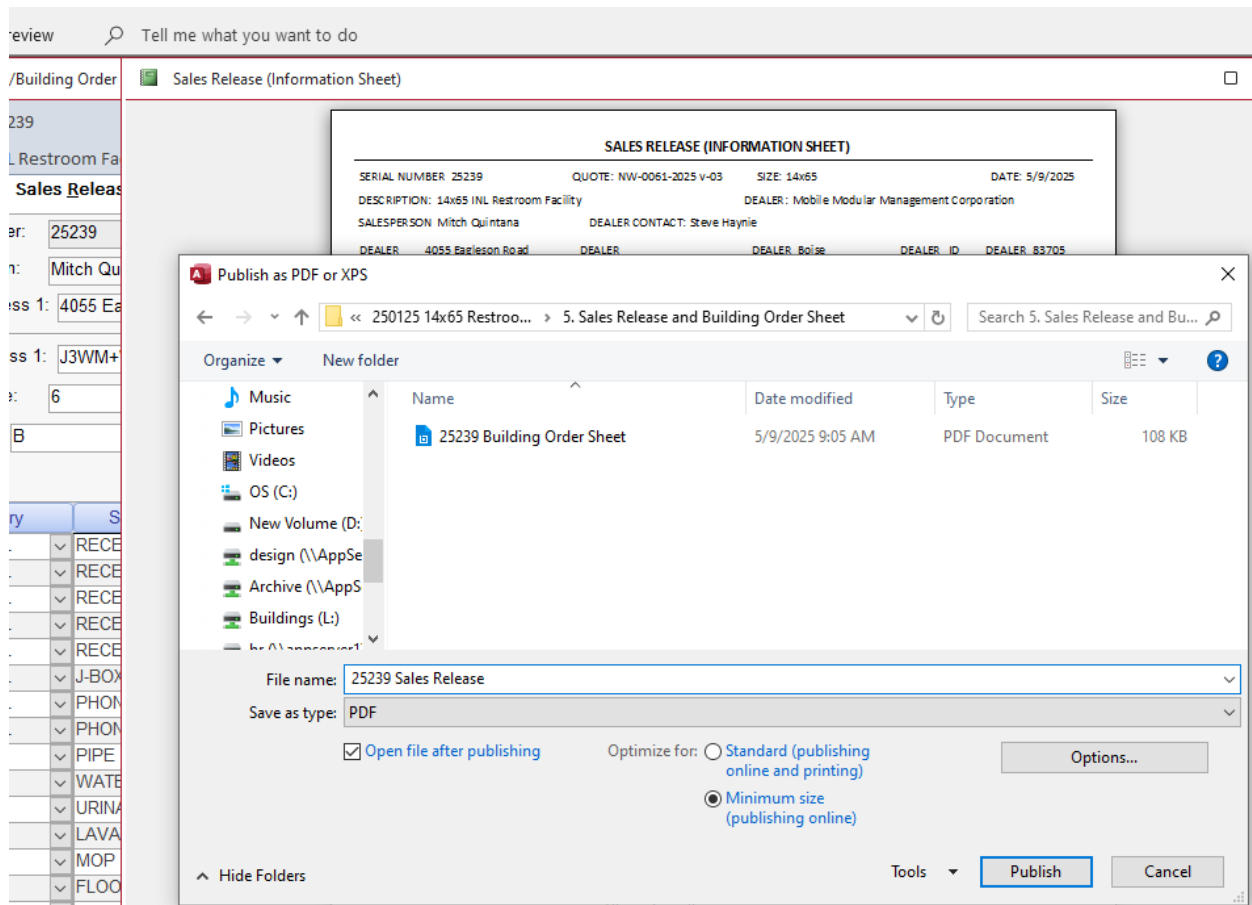
Climate Zone: 6 Floor Load: 50 SPCL Floor Load: Roof Load: 40# Set Type: PAD/PIERS/ABOVE GRADE SET

Occupancy: B WUI Compliant: (PMI Only) Plumbing Manifold Supplied: Sprinkler System: N/A NOTE: For All Except N/A, Provide

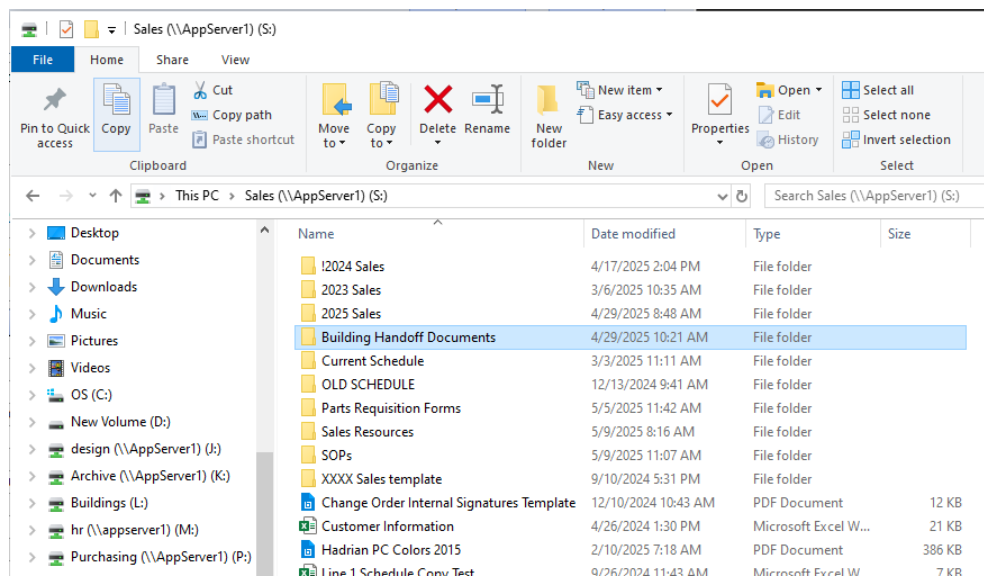
Hitch/HVAC Location On Plan: Vendor Quotes (Cut Sheets Attached): Installer:

Category	SubCategory	Description	Notes	Spell Check	QTY
MISC	MISC	36" Painted 5/16" Fiber Cement Board Skirting	Taken in option. Forty sections 36"x48"		40
STATES	STATE APP	ID Approvals			1
*					

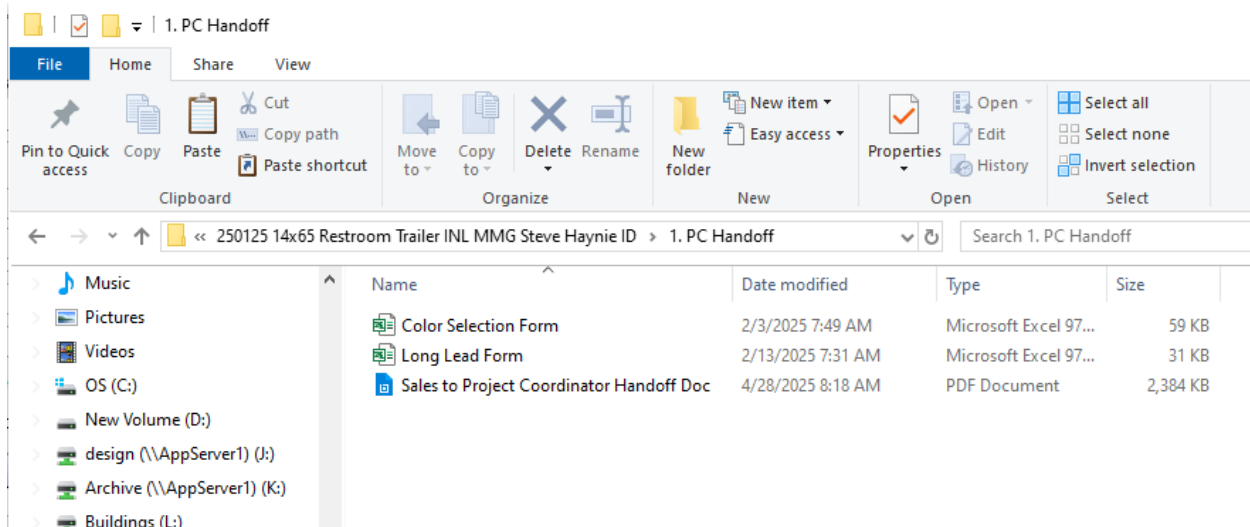
23. Save the Sales Release and print it to the bid folder in sales.



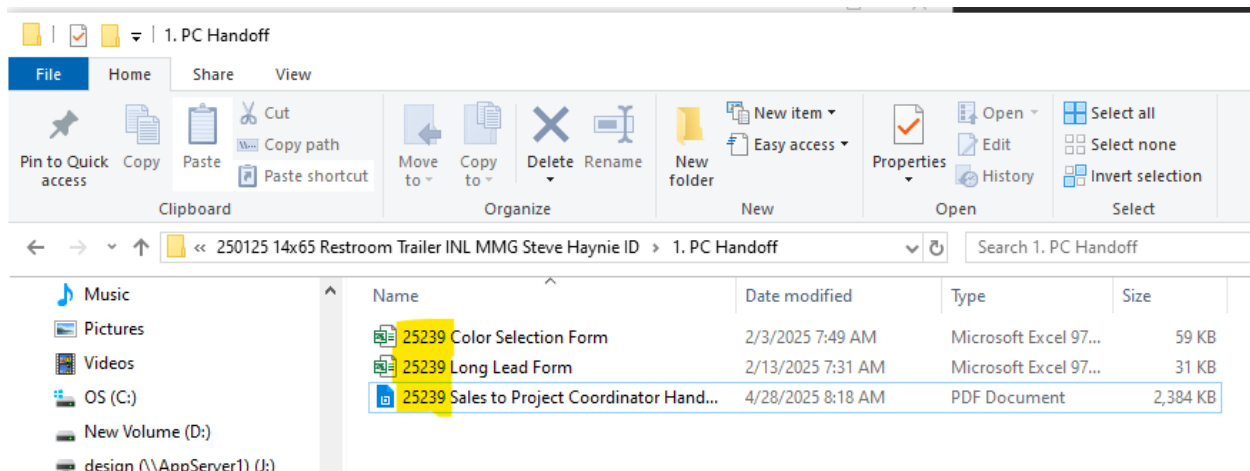
24. Once done with the Sales Release and Building Order Sheet, find the Building Handoff Documents folder in the Sales Drive.



25. Copy and paste the handoff documents into the PC Handoff sub-folder of the Bid folder.



26. Rename the handoff documents to include the building serial number(s) at the beginning of the document title.




27. Open the Color Selection Form and add an X to any items that will receive a color selection. Note brands for the Project Coordinator where applicable.

THE BELOW CHECKED ITEMS REQUIRE THE SELECTION OF A MATERIAL OR PAINT COLOR BEFORE ANY MATERIALS CAN BE ORDERED FOR YOUR BUILDING. PLEASE PROVIDE COLORS FOR ALL CHECKED ITEMS BELOW. STANDARD OPTION SAMPLES ARE PROVIDED. NON-STANDARD CHOICES MAY REQUIRE AN UPCHARGE.	
<b>FLOOR COVERING:</b>	
<input type="checkbox"/> 1/8" V.C.T.:	
<input checked="" type="checkbox"/> Roll Goods:	Mohawk
<input type="checkbox"/> Carpet:	
<input type="checkbox"/> Other:	
<input type="checkbox"/> Other:	
<input type="checkbox"/> Other:	
<b>INTERIOR WALL FINISH</b>	
<input type="checkbox"/> Standard Paneling:	
<input checked="" type="checkbox"/> Vinyl Covered Gypsum:	
<input type="checkbox"/> Vinyl Covered Paneling:	
<input type="checkbox"/> Vinyl Tackboard:	
<input type="checkbox"/> Tape, Texture & Paint:	
<input type="checkbox"/> Paint Color:	
<input type="checkbox"/> Other:	
<b>COVE BASE</b>	
<input checked="" type="checkbox"/> Vinyl:	4" Roppe
<input type="checkbox"/> Rubber:	
<input type="checkbox"/> Painted:	
<input type="checkbox"/> Stained:	
<input type="checkbox"/> Self Cove:	(To Match Lino)
<input type="checkbox"/> Other:	
<b>INTERIOR TRIM</b>	
<input type="checkbox"/> Standard Prefinished: (No Choice Options)	
<input type="checkbox"/> Painted:	
<input type="checkbox"/> Stained:	
<input type="checkbox"/> Vinyl Trim:	(To Match VCG)
<input type="checkbox"/> Corner Beads:	
<input type="checkbox"/> Other:	
<input type="checkbox"/> Other:	

28. Open the Long Lead Form and add long lead items and expected lead times. If there are any items that have a longer lead time than state submittals take, be sure to let the Project Coordinator know in your handoff email so we can get them signed off on before customer approval of the drawings.

A	B	C	D	E	F	G	H	I
<b>NWBS Long Lead Material Purchase Authorization</b>								
Serial #:	25239	Size	14x65	Date:	5/9/2025	PO	R342002673	
Customer:	Mobile Modular	Cust. Rep.:	Steve Haynie	Sales Est:	Mitch			
Qty.:	Item:	Eng. Details?	Color:	Lead Time:				
1	3 Ton 15kw 1P AC Bard with Economizer		N/A	10-12 Weeks				
1	20"x12" 15kW Duct Heater		N/A	6-8 Weeks				
1	Mustee 19F Laundry Sink		White	6-8 Weeks				
1	Bathroom Partitions		TBD	6-8 Weeks				

29. Now fill out the Project Coordinator Handoff Document basic information.



**Date:** 5/9/25

## Sales to Project Coordinator Handoff

1. Estimator: Mitch Quintana
2. Bid Folder Number: 250125
3. Building Information: 14x65 RR and Wash Facility INL  
[Serial Number, Module Letters [EX: A-D], Project Size, Project Name]
4. Confirm that the Bid folder includes the following information:

☒ Purchase Order  
☒ Sales Release  
☒ Building Order Sheet  
☐ Cut Sheets  
☒ Vendor Quotes

☒ Emails  
☒ Plans  
☒ Color Selection Form  
☒ Long Lead Form

30. Then fill out the added services the customer requested. You should know in the bidding stage if any of the following is required:

- a. Cut Sheets
- b. Physical Samples
- c. O&M Manuals
- d. Foundation Plans

**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

31. Lastly for the Sales to Project Coordinator Handoff document, fill out the miscellaneous information. Be sure to include the material cost, mechanical cost, and quantity of plumbing drops for the project coordinator's state submittals.

**9. Miscellaneous Information:**

- a. **Customer desired offline date?** August 30th, 2025
- b. **Material & Mechanical Cost & Qty** \$85,304 - \$9,650 - 33
- c. **States for Insignia:** ID
- d. **Dealer:** Mobile Modular
- e. **Dealer names, Contact Numbers, and Emails for Project:**  
Steve Haynie; 208-841-2850; Steve.Haynie@mobilemodular.com
- f. **Dealer Location:** 4055 S Eagleson Road, Boise ID 83705
- g. **End Location: Address:** J3WM+WX Scoville, ID 83415  
**County:** Butte County
- h. **Will installation be done in a city or county?** County

32. Save the Sales to Project Coordinator Handoff document when done.

33. Moving to your email, attach the handoff document, color selection form, long lead form, and PO/NTP. Email the PC, GM, Design Manager, Production Manager, Purchasing Manager, and Accounts Receivable. Include any difficulties you foresee with the building including materials, manufacturing methods, lead times, expected offline dates, etc.

Let the GM know approximate offline date so he knows what was promised to the customer.

34. **DONE!!**