



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? _____