

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