|  |  |  |
| --- | --- | --- |
| Account Contact Info | | |
| **Customer Name** | **State** | **Primary Contact Name** |
| {{lead.identifier}} | {{lead.state}} | {{primary\_contact.name}} |
| **No. and Street Name** | **Zip Code** | **Primary Contact Phone Number** |
| {{lead.street}} | {{lead.zip}} | {{primary\_contact.phone\_cf}} |
| **Address Line 2** | **Phone** | **Primary Contact Email** |
|  | {{lead.phone\_cf}} | {{primary\_contact.email}} |
| **City** | **Fax** | **Salesperson** |
| {{lead.city}} |  | {{lead.owner}} |

**{% assign estimated\_total = 0 %}{% assign napkin\_pct = lead.arcnapkins\_cf | default: 1 %}{% assign towel\_pct = lead.arctowels\_cf | default: 2 %}{% assign napkin\_pct = napkin\_pct | times: 0.01 %}{% assign towel\_pct = towel\_pct | times: 0.01 %}{% assign arc\_subtotal = 0 %}{% assign arc\_pct = 0 %}{% for p in purchases %}{% if p.oncall\_cf == "Yes" %}{% else %}{% endif %}{% if p.oncall\_cf == "Yes" %}{% else %}{% if p.purchasable.arc\_cf == "Yes" %}{% if p.purchasable.supergroup\_cf == "TABLE\_LINEN" %}{% assign curr\_arc = napkin\_pct | times: p.quantity\_cf | ceil | times: p.purchasable.replacementcost\_cf %}{% assign arc\_subtotal = arc\_subtotal | plus: curr\_arc %}{% elsif p.purchasable.supergroup\_cf == "DUST\_CONTROL" %}{% assign curr\_arc = towel\_pct | times: p.quantity\_cf | ceil | times: p.purchasable.replacementcost\_cf %}{% assign arc\_subtotal = arc\_subtotal | plus: curr\_arc %}{% else %}{% endif %}{% else %}{% endif %}{% endif %}{% assign p\_price = 0 %}{% case lead.pricelevel\_cf %}{% when "Level 1" %}{% assign p\_price = p.purchasable.lowprice\_cf %}{% when "Level 2" %}{% assign p\_price = p.purchasable.mediumprice\_cf %}{% when level 2 %}{% assign p\_price = p.purchasable.level3price\_cf %}{% else %}{% assign p\_price = p.price | default: p.purchasable.level3price\_cf %}{% endcase %}{% if p.oncall\_cf == "Yes" %}{% else %}{% assign weekly = p.quantity\_cf | times: p\_price %}{% if lead.addlinenmaintenance\_cf == "Yes" %}{% if p.purchasable.supergroup\_cf == "TABLE\_LINEN" %}{% assign weekly = lead.linenmaintenance\_cf | default: 0 | times: 0.01 | plus: 1 | times: weekly %}{% elsif p.purchasable.supergroup\_cf == "UNIFORMS" %}{% if lead.adduniformmaint\_cf == "Yes" %}{% assign weekly = lead.uniformmaintenance\_cf | default: 0 | times: 0.01 | plus: 1 | times: weekly %}{% endif %}{% endif %}{% endif %}{% assign estimated\_total = estimated\_total | plus: weekly %}{% endif %}{% endfor %}{% assign table\_linens = purchases | where: "purchasable.supergroup\_cf", "TABLE\_LINEN" %}{% assign ancillary = purchases | where: "purchasable.supergroup\_cf", "ANCILLARY" %}{% assign hospitality = purchases | where: "purchasable.supergroup\_cf", "HOSPITALITY\_LINEN" %}{% assign restroom = purchases | where: "purchasable.supergroup\_cf", "RESTROOM\_PRODUCTS" %}{% assign dusts = purchases | where: "purchasable.supergroup\_cf", "DUST\_CONTROL" %}{% assign others = dusts | concat: hospitality | concat: restroom %}{% assign uniforms = purchases | where: "purchasable.supergroup\_cf", "UNIFORMS" %} {% case lead.pricelevel\_cf %}{% when "Level 1" %}{% assign defe\_pct = campaign.campaign\_variables.ENVIRONMENTAL\_FEE\_LEVEL\_ONE\_PCT %}{% when "Level 2" %}{% assign defe\_pct = campaign.campaign\_variables.ENVIRONMENTAL\_FEE\_LEVEL\_TWO\_PCT %}{% else %}{% assign defe\_pct = campaign.campaign\_variables.ENVIRONMENTAL\_FEE\_LEVEL\_THREE\_PCT %}{% endcase %}{% assign arc\_subtotal = table\_arc | plus: mat\_arc %}{% assign estimated\_total = estimated\_total | plus: arc\_subtotal %}{% assign env\_fee = estimated\_total | times: defe\_pct | times: 0.01 %}**

|  |  |  |  |
| --- | --- | --- | --- |
| Contract/Billing | | | |
| **A/R Contact** | **DEFE Type** | **Primary Contact Name** | **Contract Expiration Date** |
|  |  | {{primary\_contact.name}} | {{lead.cxd\_cf | date: "%B %-d, %Y"}} |
| **AR Email** | **DEFE %** | **Competitor Information** | **Need to Generate Contract?** |
|  | {% if lead.defe\_cf %}{% else %}{{defe\_pct}}%{% endif %} | {{lead.competitor\_cf}} |  |
| **Terms** |  | **Estimated Revenue** | **Length of contract needed** |
| Terms (needs approved credit app) |  |  |  |

|  |  |  |
| --- | --- | --- |
| Delivery Instructions | | |
| **Start Date** | **Delivery Time Restrictions** | **Delivery Day** |
| {{lead.dateoffirstservice\_cf | date: "%B %-d, %Y"}} |  | {{lead.deliverydays\_cf | join: ", "}} |
| **Delivery Frequency** | **Parking/Delivery Entrance** | **Delivery Route** |
| {{lead.frequency\_cf}} |  | {{lead.deliveryroute\_cf}} |
| **Delivery Contact for Signature** |  |  |
|  | | |

**{% if table\_linens.size != 0 %}**

**Linen Items**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Item | Color | Frequency | Inventory | Quantity | Unit Price | ARC/SRC | Notes |
| **{% for p in table\_linens %}{{p.name}}** | **{{p.purchasable.color\_cf}}** |  | **{{p.inventory\_cf}}** | **{{p.quantity\_cf}}** | **{% assign p\_price = 0 %}{% case lead.pricelevel\_cf %}{% when "Level 1" %}{% assign p\_price = p.purchasable.lowprice\_cf %}{% when "Level 2" %}{% assign p\_price = p.purchasable.mediumprice\_cf %}{% when level 2 %}{% assign p\_price = p.purchasable.level3price\_cf %}{% else %}{% assign p\_price = p.price | default: p.purchasable.level3price\_cf %}{% endcase %}{{p\_price | round: 2 | currency}}** | **{% if p.oncall\_cf == "Yes" %}N/A{% else %}{% if p.purchasable.arc\_cf == "Yes" %}{% if p.purchasable.supergroup\_cf == "TABLE\_LINEN" %}{% assign curr\_arc = napkin\_pct | times: p.quantity\_cf | ceil | times: p.purchasable.replacementcost\_cf %}{% assign table\_arc = table\_arc | plus: curr\_arc %}{{ curr\_arc | round: 2 | currency }}{% else %}N/A{% endif %}{% else %}N/A{% endif %}{% endif %}** | **{{p.notes\_cf}}{% endfor %}** |

**{% endif %}{% if uniforms.size != 0 %}**

**Uniforms**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Item | Color | Frequency | Inventory | Quantity | Unit Price | ARC/SRC | Notes |
| **{% for p in uniforms %}{{p.name}}** | **{{p.purchasable.color\_cf}}** |  | **{{p.inventory\_cf}}** | **{{p.quantity\_cf}}** | **{% assign p\_price = 0 %}{% case lead.pricelevel\_cf %}{% when "Level 1" %}{% assign p\_price = p.purchasable.lowprice\_cf %}{% when "Level 2" %}{% assign p\_price = p.purchasable.mediumprice\_cf %}{% when level 2 %}{% assign p\_price = p.purchasable.level3price\_cf %}{% else %}{% assign p\_price = p.price | default: p.purchasable.level3price\_cf %}{% endcase %}{{p\_price | round: 2 | currency}}** | **N/A** | **{{p.notes\_cf}}{% endfor %}** |

**{% endif %}{% if others.size != 0 %}**

**Towels & Aprons**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Item | Color | Frequency | Inventory | Quantity | Unit Price | ARC/SRC | Notes |
| **{% for p in others %}{{p.name}}** | **{{p.purchasable.color\_cf}}** |  | **{{p.inventory\_cf}}** | **{{p.quantity\_cf}}** | **{% assign p\_price = 0 %}{% case lead.pricelevel\_cf %}{% when "Level 1" %}{% assign p\_price = p.purchasable.lowprice\_cf %}{% when "Level 2" %}{% assign p\_price = p.purchasable.mediumprice\_cf %}{% when level 2 %}{% assign p\_price = p.purchasable.level3price\_cf %}{% else %}{% assign p\_price = p.price | default: p.purchasable.level3price\_cf %}{% endcase %}{{p\_price | round: 2 | currency}}** | **{% if p.purchasable.arc\_cf == "Yes" %}{% if p.purchasable.supergroup\_cf == "DUST\_CONTROL" %}{% assign curr\_arc = towel\_pct | times: p.quantity\_cf | ceil | times: p.purchasable.replacementcost\_cf %}{% assign mat\_arc = mat\_arc | plus: curr\_arc %}{{ curr\_arc | round: 2 | currency }}{% else %}N/A{% endif %}{% else %}N/A{% endif %}** | **{{p.notes\_cf}}{% endfor %}** |

**{% endif %}{% if ancillary.size != 0 %}**

**Ancillary Items**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Item | Color | Frequency | Inventory | Quantity | Unit Price | ARC/SRC | Notes |
| **{% for p in ancillary %}{{p.name}}** | **{{p.purchasable.color\_cf}}** |  | **{{p.inventory\_cf}}** | **{{p.quantity\_cf}}** | **{% assign p\_price = 0 %}{% case lead.pricelevel\_cf %}{% when "Level 1" %}{% assign p\_price = p.purchasable.lowprice\_cf %}{% when "Level 2" %}{% assign p\_price = p.purchasable.mediumprice\_cf %}{% when level 2 %}{% assign p\_price = p.purchasable.level3price\_cf %}{% else %}{% assign p\_price = p.price | default: p.purchasable.level3price\_cf %}{% endcase %}{{p\_price | round: 2 | currency}}** | **N/A** | **{{p.notes\_cf}}{% endfor %}** |

{% endif %}

|  |
| --- |
| Delivery Instructions |
| **Notes for Office: Ie. Special notes for 1st delivery, any misc items**  **{{lead.deliveryinstructions\_cf}}** |