

Commercial Client Management-Projects

Commercial Project Management version of CMM enable is designed to help manage and track everything about a multiple-phase project and jobs in builder and commercial sectors.

- Group together project data to stay on top of everything that happens during the sales process.
- Alert the sales person when purchase orders are generated and material is received
- View all records together in the Order History screen related to the order including purchase orders, installations scheduled and accounts payable records

Access to Information from Project Screen

Prospects/Customers/Contacts

Milestone Dates

Project Status

Estimates/Bids

Proposals/Change orders

Correspondence

Transmittals/Submittals

Requests

Order Detail

Billing Group/Order Lines/Baseline

Schedule/Purchase Orders

Reports

Tests

Installation Forecasts

Status of Bids, Quotes, Orders

Basic Set Up of Client Management Projects

Project Types

Project Statuses

Project Prompts

Dates

Labels

Project Reports-Templates

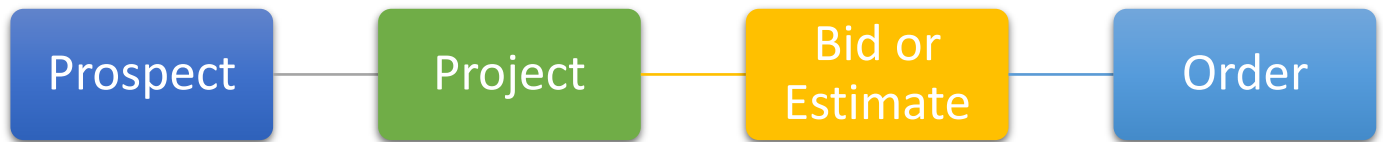
Workflow Actions

Create a Project

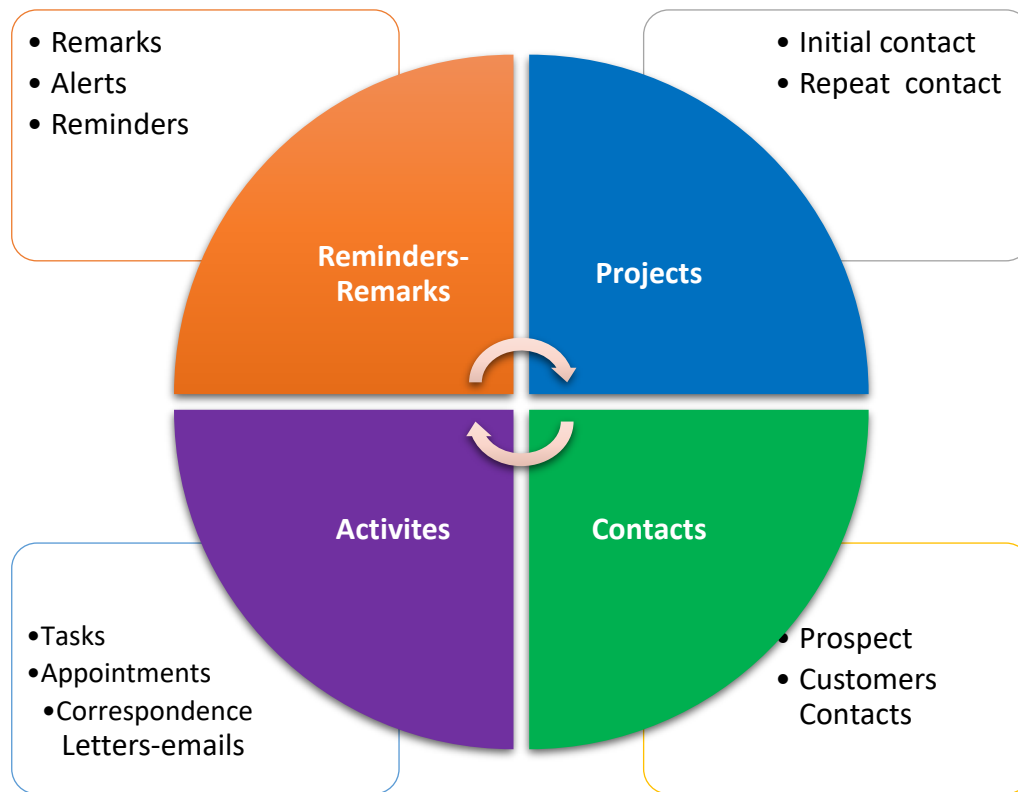
Project Workflow Actions

Reports

Client Management Life Cycle



Productivity



Projects



Project Details

Primary Customer
Primary Estimate
Project Type
Project Mgr
Salesperson
4 User Defined
Fields



Project Tracking

Project Status
Milestone Dates
Automated
Workflow Actions



Project Associated Records

Project
Contacts
Bids Estimates
Orders
Change Orders



Project Reports & Documents

Transmittals
& Submittals
Requests
Installation
Forecasts
Status of:
Bids, Quotes,
Orders
Baseline -
Budget to
Actual

Project Reports



Basic Set Up for Client Management Projects

Located in System Options

Hidden	Type	Module	Applies To	Category	Option	Value	Note
	Global	Client Management	Projects	Prompts	Date Field 1	Plan Date UD	
	Global	Client Management	Projects	Prompts	Date Field 2	Foundation Date UD	
	Global	Client Management	Projects	Prompts	Date Field 3	Framing Date UD	
	Global	Client Management	Projects	Prompts	Date Field 4	Selection Date UD	
	Global	Client Management	Projects	Prompts	Date Field 5	Contract Date UD	
	Global	Client Management	Projects	Prompts	Date Field 6	Close Date UD	
	Global	Client Management	Projects	Prompts	User Field 1		
	Global	Client Management	Projects	Prompts	User Field 2		
	Global	Client Management	Projects	Prompts	User Field 3		
	Global	Client Management	Projects	Prompts	User Field 4		

Project Types

Utilities>Public Parameters & Set Up>Projects

A project can be a group of any related records. Since this is the case, more than one kind of project is possible. In system settings, the list of project types for use in the project area is user definable. Types are listed alphabetically.

Project Types

EXIT New Add Edit Delete Show Inactive

Search Project Type

Project Type

- HEALTH CARE-NEW CONST
- HEALTH CARE-REMODEL
- HOSPITALITY-NEW CONSTR
- HOSPITALITY-REMODEL
- LG RETAIL-NEW CONST
- LG RETAIL-REMODEL
- MAIN STREET-NEW CONSTR
- MAIN STREET-REMODEL

Project Status

This information is used in the Project data and can be defined as needed. An example list is included.

The 'Project Statuses' window displays a list of project status steps and their corresponding order numbers. The window has a title bar with standard window controls and a toolbar with icons for EXIT, a green plus, a yellow pencil, and a red X. A 'Show Inactive' checkbox is also present. Below the toolbar, there are tabs for 'Order' and 'Project Status'. The 'Project Status' tab is active, showing a list of status steps with an 'Order' column. The list is as follows:

Project Status	Order
01-BIDDING	1
02-AWARDED	1
03-SUBMITTALS	1
04-MATERIAL ORDERED	2
05-JOB SITE INSPECTION	3
06-INSTALL STARTED	4
07-BILLING	5
08-FOLLOW UP	6
09-PROJECT COMPLETED	7
10-LOST COMPETITOR	8

Project Prompts

Entering these labels in ALL CAPS, distinguishes them from the system set fields.

Date Labels

These are used in project data and reports. These will be the milestone dates tracked for project steps. One set of examples is listed in the figure below. Dates 1-3 and User 1-3 appear on the project reports.

Example:

The 'Milestone Dates' section contains several date fields, each with an F8 function key label. The fields are arranged in three columns:

Estimate Date	Blue Prints	1st Job Walk
Start Date	Take Off	Moisture Test
Complete Date	Bid Prepared	Punch List

User Defined Labels

These are used in project data "General Information". Use these for any information you want readily available about your project

The 'General Information' section contains various project data fields. The fields are arranged in two columns:

Contract Number	Job ID
Project Name	Contractor
Project Type	Site Super
Project Status	Project Manager
Project Manager	Other
Salesperson	

Project Report Templates

Project Report Templates

This will be used to set defaults for specific types of project reports. The defaults will be used when creating a new report but can be edited when printing a specific report.

There multiple predefined report types: PROPOSAL, REQUEST, CHANGE ORDER, TRANSMITTAL / SUBMITTAL.

Complete as little or as much of the default information and fill in the rest at the time letters are created.

Report Templates



Filters Template Type

Template Name	Template Type	Format	Title
PROPOSAL	PROPOSAL	REPORT	PROPOSAL
REQUEST	REQUEST	REPORT	REQUEST - Special Action
SUBMITTAL	TRANSMITTAL / SUBMITTAL	REPORT	SUBMITTAL
TRANSMIT INFORAMTION	TRANSMITTAL / SUBMITTAL	REPORT	Title?

Primary Customer
Business F8 Store F8
Contact Address
Work # Mobile #
Business # Other # City
E-Mail State Zip

General Information
Contract Number Job ID
Project Name User Defined 1
Project Type F8 User Defined 2
Project Status F8 User Defined 3
Project Manager F8 User Defined 4
Salesperson F8

Milestone Dates
Estimate Date F8 Blue Prints F8
Start Date F8 Take Off F8
Complete Date F8 Bid Prepared F8

Additional Related Records | Appointments | Tasks | Letters | Remarks | Interoffice Mail | Tests | Document Hist


Letter Date	Due Date	Type	Regarding	Sent By

 Send Mail  Attachments  Reports  Workflow Actions  New Quote or Bid Pro Estimate

Project Work Flow Actions

Workflow actions do more than just “remind” the user, they actually drive a project’s workflow by specifying when certain actions should take place. Now actionable items can be created directly from project workflow actions.

This is where actions which will apply to a type of project rather than just a specific project can be set up. Actions are set for a project type then inherited each time a project of that type is added.

Project Workflow Action Set Up Record Field Definitions:

Choose a **project type** by clicking **F8** and selecting from the drop down list. If the same action is used for multiple project types it must be set up for each project type. Enter a single **state** or leave blank for all states. Workflow Action will only be generated for Projects where the Primary Customer State matches.

Action – Enter a description of action to be taken. This is a required field, it will display on the Work Flow Action Browse list.

Action Type - In addition to generating a Workflow Action record, certain Action Types also do additional actions when the Workflow Action record is marked Completed.

- **Change Status** - Project Status Changed
- **Appointment** - Creates Appointment; an Appointment Type is also required.
- **Task** - Creates Task; a Task Type is also required.
- **Letter** - Creates Letter; a Letter Type is required and Letter Template can also be entered.
- **Remark** - Creates Remark; a Remark Type is also required.
- **Report** - Print Project Report; a Report Type is also required and Report Template can also be entered.

- **Send Document** - Creates Project Document History for PDF and can be emailed; a pdf file can be attached
- **Other** - No Additional Actions

Assigned To - This Workflow Action Assigned to field will default to this selection. For Projects the choices are Project Salesperson, Project Manager, and Project Created By. If assigned to Project Salesperson or Project Manager and none is listed on the project, the assigned to will be **“to be assigned”**.

Outcome Type- Different Action Types will require information here. For example, If the Action Type is Task, a task type will be required here.

Details - Populates the corresponding Details field on the created record.

Automatically Create Task on Action Date – Checking this box means that **on the action date** the workflow action will automatically convert from a workflow action with a date based on a lead date that could change to a specific action with a specific date. Until the action date, the record remains a workflow action. This applies to Action Types APPOINTMENT, TASK, LETTER, REMARK and CHANGE STATUS.

Example: For Tasks, this would mean that the Task record would be created and the Workflow Action would be marked completed on the action date.

If a Workflow Action is set to Automatically Do the Outcome on Action Date, then the Assigned to Status for the Outcome record will be set to **Requested**. This will prevent the assigned person from missing the record.

Select Date or Event to Use to Calculate Action Date- More date options have been added including the user defined dates.

Events have been added as an option for creating actions. These include every new quote, every new bid or every new order added to a project. For example with every new Bid Pro Estimate added to a project a task to make a call to confirm the receipt of the estimate could be added.

Inactive - Marking this Inactive will delete existing Outstanding Workflow Action records on projects but will not delete Completed ones. Workflow Action records will no longer be generated for this Workflow Action Set Up record.

A reminder will automatically be created for the workflow action for 8:00 AM on the action date. This will cause the workflow action to display on the **Reminders and Requests Screen** if it is Outstanding, Assigned to the User and has an active reminder. Workflow actions are no longer separate reminders.

Projects-Overview

Think of this as a folder to collect any records relevant to a project. A project can be any grouping of related records.

Project Browse Screen

FILTERS

This will search the Project Name and Contract Number fields in the Project for the value entered. Click the button to the right to change from Contains to Starts with.

Search Fields:

Project Type:

Project Status:

Created By:

The data can be sorted by any of the column headings including date fields.

The project information for the highlighted record is shown on the right of the browse screen.

Double click on the highlighted project, or click the edit button to get to the Project Data Screen

The screenshot shows a software interface titled "Projects". It features a "Project Filters" section with input fields for "Search Fields", "Project Type", "Project Status", and "Created By", each with a dropdown menu. There are also checkboxes for "Private", "Active", "Public", and "Inactive". Below the filters is a table with the following columns: Contract Number, Project Name, Project Type, Project Status, Related Record, and Related Record. The table contains several rows of project data. The row for "HALE COUNTY CENTER" is highlighted. To the right of the table is a sidebar titled "Primary Customer Information" which displays details for "CONTRACTORS, INC." including contact information and a "Project Information" section.

Contract Number	Project Name	Project Type	Project Status	Related Record	Related Record
	BEST BUY-9080	LG RETAIL-NEW CONST	01-BIDDING	JE000008-1	BID PRO ES
AR45677	CHICAGO LASALLE	HEALTH CARE-REMODEL	02-AWARDED	JE000019-1	BID PRO ES
CG000033	HALE COUNTY CENTER	HEALTH CARE-REMODEL	04-MATERIAL ORDERED	JE000020-1	BID PRO ES
	INNER HARBOR PLACE PHASE	HARBOR COMPLEX	01-BIDDING	JE000018-1	BID PRO ES
8900	ORTHOPEDIC INN	HOSPITALITY-NEW CONSTR	04-MATERIAL ORDERED	8900 -1	BID PRO ES

Primary Customer Information
Business: CONTRACTORS, INC.
Contact: DAVID DAWSON
Work #: 333-333-3333
Project Information
CO Number
Architect

Set up Project

Primary Customer | Estimate, Quote or Order

The screenshot shows a "Set up Project" form. It is divided into two main sections: "Primary Customer" and "Primary Estimate, Quote or Order". The "Primary Customer" section contains fields for Business, Contact, Work #, Mobile #, Business #, Other #, EMail, Store, Address, City, State, and Zip. The "Primary Estimate, Quote or Order" section contains fields for BID PRO ESTIMATE, JE000020-1, and a "Report History" section with Last Proposal, Last Request, and Last Transmittal.

Primary Customer
Business: CONTRACTORS, INC. F8
Contact: DAVID DAWSON
Work #: 333-333-3333 Mobile #:
Business #: 444-444-4444 Other #:
EMail: contractors4hire@msn.com
Store: 100 F8
Address: 365 SELMA ROAD
SUITE 15
City: CHARLESTON
State: SC Zip: 29406

Primary Estimate, Quote or Order
BID PRO ESTIMATE F8
JE000020-1
Report History
Last Proposal: 2 Last Request: 1
Last Transmittal: 3

General Information

General Information	
Contract Number	CG000033
Project Name	HALE COUNTY CENTER
Project Type	HEALTH CARE-REMODEL F8
Project Status	04-MATERIAL ORDERED F8
Project Manager	F8
Salesperson	F8
CO Number	
Architect	JIM COHEN
General Contractor	Ellis Architects, Inc
Owner	MULTIPLE**
User Field 4	N/A

Additional Related Records

Additional Related Records						
Appointments Tasks Letters Remarks Interoffice Mail Tests Document History Record Edits						
Actions for Highlighted Related Record:						
Synchronize Related Records: ☐ Orders ☐ Bid Pro Estimates ☐ Purchase Orders ☐ Quotes ☐ Schedule Pro Jobs ☐ Accounts Payable Sync						
Type	Number	Contact	Business	City	Store	
PROSPECT	39	Ellis Architects, Inc	Ellis Architects, Inc	TUSCALOOSA	100	
BID PRO SUB ESTIMATE	JE000020-3	HALE COUNTY LIFE SKILLS C	WEST ELM CONTRACTORS,	BATON ROUGE	100	
BID PRO SUB ESTIMATE	JE000020-2	HALE COUNTY LIFE SKILLS C	SMITH CONSTRUCTION, INC	ATLANTA	100	

Adding Related Record

Related To

Record Type

Business

Contact

Phone #'s

E-Mail

Record Information

Date Added

Added By

Search All Records

EXIT

Find

Print

Export

Filters

Record Type

Status

Type

ACTIVE

CUSTO

ACTIVE

CUSTO

ACTIVE

CUSTO

ACTIVE

CUSTO

ACTIVE

CUSTO

Prospects and Customers

All

Prospects and Customers

Contacts

Suppliers

Manufacturers

Personnel

Orders

Quotes

Bid Pro Estimates

Purchase Orders

Accounts Payable

NHMS Home Buyers

NHMS Project Overviews

Schedule Pro Job

Filters

Record Type

Search For Number

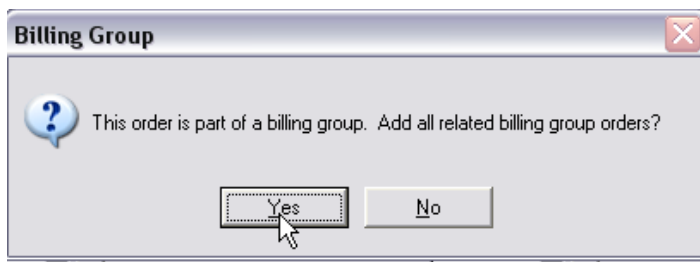
Search For Name

Starts With

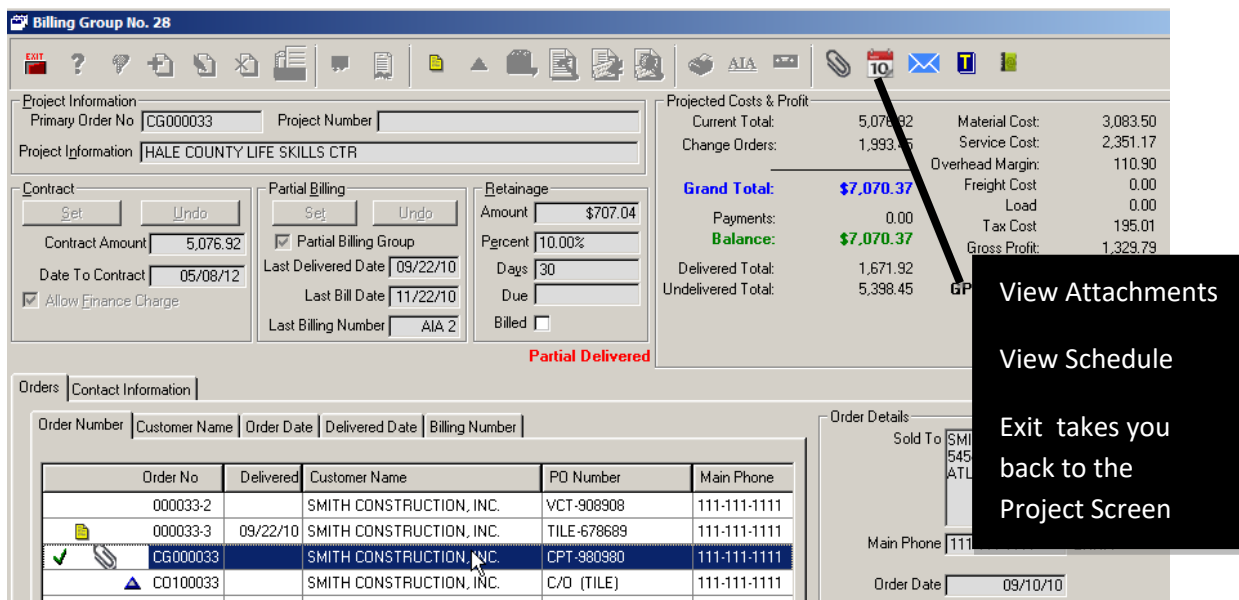
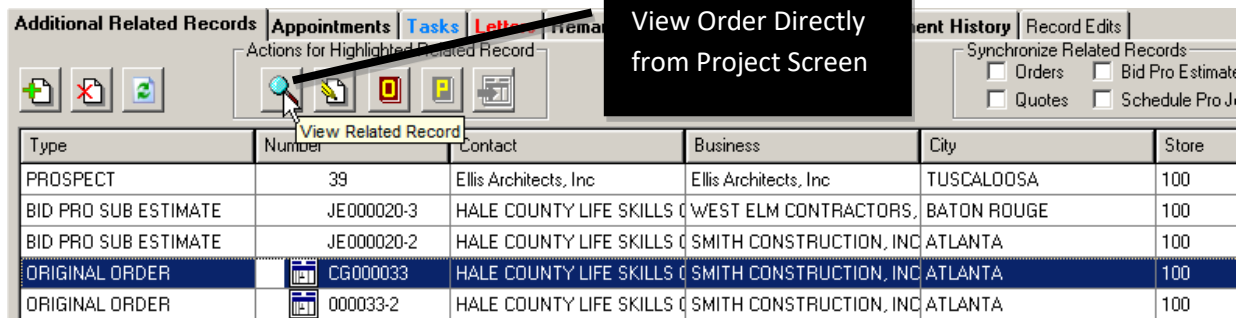
Active ☒

Inactive ☐

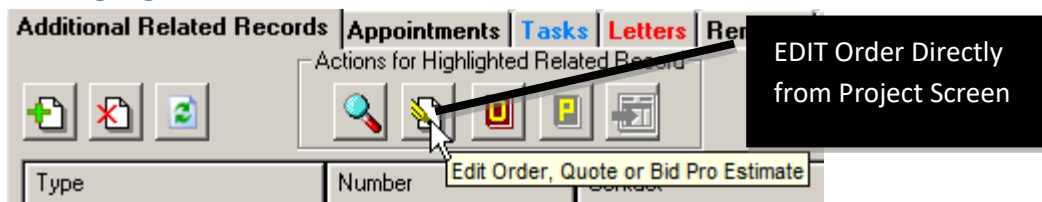
Status	Type	Number	Name	Company	City	Address 1
NOT DELIVERED	ORIGINAL ORDER	CG900009	SMITH CONSTRUCTION, I		TUSCALOOSA AL 35401	5454 SMITH LANI
NOT DELIVERED	ORIGINAL ORDER	CG900010	SMITH CONSTRUCTION, I		TUSCALOOSA AL 35401	5454 SMITH LANI
NOT DELIVERED	ORIGINAL ORDER	CG900011	SMITH CONSTRUCTION, I		TUSCALOOSA AL 35401	5454 SMITH LANI
NOT DELIVERED	ORIGINAL ORDER	CG000028	SMITH CONSTRUCTION, I		ATLANTA GA -	5454 SMITH LANI
NOT DELIVERED	ORIGINAL ORDER	051710	SMITH CONSTRUCTION, I		ATLANTA GA -	5454 SMITH LANI
NOT DELIVERED	ORIGINAL ORDER	CG000029	SMITH CONSTRUCTION, I		TUSCALOOSA AL 35401	5454 SMITH LANI
NOT DELIVERED	ORIGINAL ORDER	CG000030	SMITH CONSTRUCTION, I		TUSCALOOSA AL 35401	5454 SMITH LANI
NOT DELIVERED	ORIGINAL ORDER	CG000031	SMITH CONSTRUCTION, I		TUSCALOOSA AL 35401	5454 SMITH LANI
NOT DELIVERED	ORIGINAL ORDER	CG000032	SMITH CONSTRUCTION, I		TUSCALOOSA AL 35401	5454 SMITH LANI
NOT DELIVERED	ORIGINAL ORDER	CG000033	SMITH CONSTRUCTION, I		ATLANTA GA -	5454 SMITH LANI



View Related Record Order



Edit Highlighted Related Record



Billing Group No. 28

Project Information
 Primary Order No: CG000033 Project Number:
 Project Information: HALE COUNTY LIFE SKILLS CTR

Contract
 Set Undo
 Contract Amount: 5,076.92
 Date To Contract: 05/08/12
☒ Allow Finance Charge

Partial Billing
 Set Undo
☒ Partial Billing Group
 Last Delivered Date: 09/22/10
 Last Bill Date: 11/22/10
 Last Billing Number: AIA 2

Retainage
 Amount: \$707.04
 Percent: 10.00%

Projected Costs & Profit
 Current Total: 5,076.92
 Change Orders: 1,993.45
Grand Total: \$7,070.37
 Payments: 0.00
Balance: \$7,070.37

Material Cost: 3,083.50
 Service Cost: 2,351.17
 Overhead Margin: 110.90
 Freight Cost: 0.00
 Load: 0.00
 Tax Cost: 195.01
 Gross Profit: 1,329.79
 Net Sale: 6,875.36
Percent: 19.34%
 (Gross Profit / Net Sale)

Orders | Contact Information

Order Number	Customer Name	Order Date	Delivered Date	Billing Number
000033-2	SMITH CONSTRUCTION, INC.			VCT-908908
000033-3	SMITH CONSTRUCTION, INC.	09/22/10		TILE-678689
CG000033	SMITH CONSTRUCTION, INC.			CPT-980980
CO100033	SMITH CONSTRUCTION, INC.			C/O (TILE)

Order No: 000033-2 Delivered: Customer Name: SMITH CONSTRUCTION, INC. VCT-908908 111-111-1111
 Order No: 000033-3 Delivered: 09/22/10 Customer Name: SMITH CONSTRUCTION, INC. TILE-678689 111-111-1111
 Order No: CG000033 Delivered: Customer Name: SMITH CONSTRUCTION, INC. CPT-980980 111-111-1111
 Order No: CO100033 Delivered: Customer Name: SMITH CONSTRUCTION, INC. C/O (TILE) 111-111-1111

Main Phone: 111-111-1111 ERRM
 Order Date: 09/10/10

ALL functions are available to be
 ACCESSED

Exit takes you back to the Project
 Screen

View History for Highlighted Record-Billing Group

Additional Related Records | Appointments | Tasks | Letters | Remarks | Inter

Actions for Highlighted Related Record

View History for Highlighted Order

Overview of all Orders-

- NOTES
- SCHEDULED JOBS
- PURCHASE ORDERS
- ACCOUNTS PAYABLE

History for Order CG000033

Orders, Quotes & Estimates

EXIT **Add All Records to a Project** Select Order Type **ORDER** Enter Number **CG000033** F8

Type	Order #	Customer	Ship Name	Order Date	Est Del Date	Delivery Date
ORIGINAL ORDER	TLW-1	SMITH CONSTRUCTION, I	HALE COUNTY LIFE SKILLS C	05/18/10	05/26/10	05/08/12
ORIGINAL ORDER	TLW-2	SMITH CONSTRUCTION, I	HALE COUNTY LIFE SKILLS C	05/18/10	05/26/10	06/07/10
ORIGINAL ORDER	000033-1	SMITH CONSTRUCTION, I	HALE COUNTY LIFE SKILLS C	05/18/10		11/21/10
ORIGINAL ORDER	CG000034	SMITH CONSTRUCTION, I	HALE HEALTH CARE	05/18/10		
ORIGINAL ORDER	CG000035	SMITH CONSTRUCTION, I	HALE COUNTY LIFE SKILLS C	06/04/10		
ORIGINAL ORDER	CG000036	SMITH CONSTRUCTION, I	HALE COUNTY LIFE SKILLS C	06/04/10		

Scheduled Jobs

Order #	Install Date	Crew	Insta
TLW-1	05/26/10		TUSC
000033-3	09/22/10	TOM SMITH (S)	TUSC
CG000044	11/29/10	MICHAEL GONZALEZ	TUSC
050812	05/15/12	CPT INSTALLER IN TUSC	

Purchase Orders

PO Num - Line	Style	Color	Supplier	Status
000033-3-1	AMERICAN I FLO GRAND CANYO		CROSSVILLE	SATISFIED
000033-3-2	THIN SET-MAPEI GRAY OR WHITE		MAPEI	SATISFIED
000033-3-3	GROUT-LATICRE NATURAL GRAY		LATICRETE	SATISFIED
000033-3-4	TILE TRANSITION STAINLESS STEE		SCHLUTER SYST	SATISFIED
050812-1	WINDFALL-PREM CASH COW		J&J INDUSTRIES	OPEN
050812-13	RONPF COVER&4 LIGHT GR&Y 195		SP&CE FLOORING	OPEN

Accounts Payable

Inv Num	Inv Date	Supplier	Date Paid
19800980	05/10/10	SUPPLIER	
19800980	05/10/10	SUPPLIER	
897979	05/10/10	SUPPLIER	
897979	05/10/10	SUPPLIER	
897979	05/10/10	SUPPLIER	
897979	05/10/10	SUPPLIER	

List of PO's Generated
Status of PO
VIEW PO

Scheduled Job listed and can be VIEWED

Notes and Remarks can be VIEWED and EDITED from screen. Click on the MAGNIFYING GLASS to access and edit notes

All Notes and Remarks for Order Number: CG000035

EXIT

Note/Remark Type	Number	Line	Date Created	Date Edited
Order Line	CG000035	19	06/04/10	06/04/10
Order Line	CG000035	20	06/04/10	06/04/10
Order Line	CG000035	21	06/04/10	06/04/10
Order Line	CG000035	22	06/04/10	06/04/10
Order Line	CG000035	14	06/04/10	06/04/10
Order Line	CG000035	15	06/04/10	06/04/10
Order Line	CG000035	18	06/04/10	06/04/10
Order Line	CG000035	11	06/04/10	06/04/10
Order Line	CG000035	12	06/04/10	06/04/10
Order Line	CG000035	13	06/04/10	06/04/10
Order Line	CG000035	9	06/04/10	06/04/10
Order Line	CG000035	10	06/04/10	06/04/10
Order Line	CG000035	6	06/04/10	06/04/10
Order Line	CG000035	7	06/04/10	06/04/10
Order Line	CG000035	8	06/04/10	06/04/10
Order Line	CG000035	1	06/04/10	06/04/10
Order Line	CG000035	4	06/04/10	06/04/10
Order Line	CG000035	5	06/04/10	06/04/10
Purchase Order	CG000035	1	06/04/10	06/04/10

COMBINED AREAS:
 CUT GROUP 1 (105-OFFICE) QTY: 19.67 SY
 CUT GROUP 1 (106-CONFERENCE ROOM) QTY: 13 SY
 CUT GROUP 2 (102-OFFICE,114-RECORDS,104-OFFICE) QTY: 23.11 SY
 CUT GROUP 3 (120-OFFICE) QTY: 16.33 SY
 CUT GROUP 4 (103-RECEPTION) QTY: 11.89 SY
 CUT GROUP 5 (120-OFFICE,114-RECORDS) QTY: 24.67 SY
 CUT GROUP 6 (102-OFFICE) QTY: 22.44 SY
 CUT GROUP 7 (106-CONFERENCE ROOM) QTY: 14.11 SY
 CUT GROUP 8 (119-OFFICE) QTY: 23.11 SY

Click on MAGNIFYING GLASS to see Detail:

Schedule Pro Detail

View Scheduled Job

Scheduled Job Information

Store: Order Number:
 Depot: Reference:
 Primary Crew: Customer:
 Secondary Crew: Salesperson:
 Warehouse Prep: Job Number:
 Start Date: Ship To Name:
 End Date: Ship To Address:
 City:
 State: Zip:

Line #	PC	Job Type	Style	Color	Description	Crew Name	Qty	Units	Install Date
1	01	CARPET	NDFALL-PREMIER BAC	CASH COW	COMBINED AREAS	CPT INSTALLER INC (S)	56.10	SY	05/15/12
1	01	CARPET	NDFALL-PREMIER BAC	CASH COW	COMBINED AREAS	CPT INSTALLER INC (S)	56.10	SY	05/16/12
1	01	CARPET	NDFALL-PREMIER BAC	CASH COW	COMBINED AREAS	CPT INSTALLER INC (S)	56.13	SY	05/17/12
18	61	CARPET	TALL/BLUE DOWN (S)		COMBINED AREAS	CPT INSTALLER INC (S)	56.00	SY	05/15/12
18	61	CARPET	TALL/BLUE DOWN (S)		COMBINED AREAS	CPT INSTALLER INC (S)	56.00	SY	05/16/12
18	61	CARPET	TALL/BLUE DOWN (S)		COMBINED AREAS	CPT INSTALLER INC (S)	56.01	SY	05/17/12
19	61	CARPET	FLOOR/SKIM FLOAT (S)		COMBINED AREAS	CPT INSTALLER INC (S)	0.67	HR	05/15/12
19	61	CARPET	FLOOR/SKIM FLOAT (S)		COMBINED AREAS	CPT INSTALLER INC (S)	0.67	HR	05/16/12
19	61	CARPET	FLOOR/SKIM FLOAT (S)		COMBINED AREAS	CPT INSTALLER INC (S)	0.66	HR	05/17/12

View Scheduled Job

Scheduled Job Information

Store: Order Number:
 Depot: Reference:
 Primary Crew: Customer:
 Secondary Crew: Salesperson:
 Warehouse Prep: Job Number:
 Start Date: Ship To Name:
 End Date: Ship To Address:
 City:
 State: Zip:

Line #	PC	Job Type	Style	Color	Description	Crew Name	Qty	Units	Install Date
1	05	TILE	1/4" FLOOR TILE 12X12	GRAND CANYON	COMBINED AREAS	TOM SMITH (S)	204.00	SF	09/22/10
2	45	MISCELLANEOUS	1/2" MULTI FLEX 150 LB	GRAY OR WHITE	(PROJECT-LEVEL)	TOM SMITH (S)	3.00	BG	09/22/10
3	25	MISCELLANEOUS	800 SANDED 10 LB GP1	NATURAL GRAY 24	COMBINED AREAS	TOM SMITH (S)	4.00	EA	09/22/10
4	25	MISCELLANEOUS	1/2" STAINLESS STEEL	LESS STEEL 304 (E)	COMBINED AREAS	TOM SMITH (S)	3.00	PC	09/22/10
5	65	TILE	FLOOR-TILE DIAGONAL		COMBINED AREAS	TOM SMITH (S)	225.00	SF	09/22/10

PO Detail

View Purchase Order

PO Line #:
 Order Date: Store:

PC: Units:
 Manufacturer:
 Supplier:
 Private Supplier:
 Style:
 Private Style:
 Color:
 Private Color:
 Roll Number:
 Style Number:
 Private Style Number:
 Color Number:
 Private Color Number:
 Serial Number:
 SKU:
 FOB:
 Req Dye Lot:

Width: Order Method:
 Length: Min Length:
 Roll/Cut: Max Length:
 Cost: Roll Qty:
 Amt Ordered: Same Dye: ☒
 Amt Received:

Ordered By:
 Taken By:
 Requested Ship Date:
 Promise Date:
 Requested Del Date:
 Reserve / Contract #:

Status:
 Total Value:

Reference Number:
 Sidemark:
 Comments:
 Salesperson 1:
 Salesperson 2:
 Est Del Date:
 Manf SKU:

Builder:
 Subdivision:
 Block: Lot:

ACTIVITIES RELATED TO THE PROJECT

Appointments

Additional Related Records						
Appointments						
Tasks Letters Remarks Interoffice Mail Tests Document History Record Edits						
Appt Date	Start Time	End Time	Appointment	Type	Status	Assigned To
08/19	9:30 AM	10:00 AM	CALL FOR BLUEPRINTS	ACQUIRE INFORMATION	COMPLETED	
08/24	7:30 AM	9:30 AM	MEET TO REVIEW SPEC	SPEC REVIEW	COMPLETED	
08/25	9:00 AM	12:00 PM	TAKEOFF-ESTIMATING	TAKEOFF	SCHEDULED	
08/26	1:30 PM	2:30 PM	REVIEW TAKEOFF JOB	TAKEOFF REVIEW	SCHEDULED	
08/27	9:00 AM	11:00 AM	GENERATE BID	CREATE PROPOSAL	SCHEDULED	
09/18	11:00 AM	12:30 PM	JOB SITE INSPECTION	PRE-WALK JOB	SCHEDULED	

Changing Appointment

Appointment Information

Appointment:

Type: F8

Location:

Details:

NEED TO CONFIRM THE PATTERN LAYOUT IN CORRIDORS, INSPECT THE CONDITION OF THE RESTROOMS AS WELL AS THE OVERALL STATUS OF THE JOB

Related To

Record Type: F8

Contract #:

Business:

Contact:

Phone #'s:

E-Mail:

Appointment Status

Assigned To: F8

Assigned To Status: ☒ Accepted ☐ Requested ☐ Declined ☐ To Be Assigned

Priority: ☒ Low ☐ Normal ☐ High

Appt Status: ☒ Scheduled ☐ Need To Reschedule ☐ Completed ☐ Tentative ☐ Follow Up Needed ☐ Canceled

Appt Date: F8 Start Time: F8 End Time: F8

Reminder: ☒ Date: F8 Time: F8

Record Information

Date Created: Inactive: ☐

Created By:

Date Edited:

Edited By:

Viewing Rights: ☐ Private ☒ Public Use As Template: ☐

Tasks

Additional Related Records						Appointments	Tasks	Letters	Remarks	Interoffice Mail	Tests	Document History	Record Edits
  						☐ All ☐ Outstanding ☒ 10 Mo							
Start Date	Highlighted	Task	Details		Type	Assigned To							
10/16/	10/17/	REVISE BID WITH NEW SPECS	CHANGES MADE TO THE TILE FROM 12" TO 16" IN THE		SEND INFO								
10/20/	10/21/	GET SAMPLES TO GC			OTHER								
10/21/	10/21/	↑ GET SUBMITTAL LETTER TOGETHER			SEND INFO								

Changing Task

Task Information

Task:

Details:

Type: ☐ Call ☒ Send Info ☐ Email ☐ Demo ☐ Other

Task Status

Assigned To:

Assigned To Status: ☒ Accepted ☐ Requested ☐ Declined ☐ To Be Assigned

Priority: ☐ Low ☒ Normal ☐ High

Completed: ☒ Start Date: Due Date:

Reminder: ☐ Reminder Date: Reminder Time:

Related To

Record Type: Contract #: Business: Contact: Phone #s: EMail:

Record Information

Date Created: Created By: Date Edited: Edited By:

Viewing Rights: ☐ Private ☒ Public Use As Template: ☐

Letters

Additional Related Records | Appointments | **Tasks** | Letters | Remarks | Interoffice Mail | Tests | Document History

Letter Date	Due Date	Type	Regarding	Sent By
09/10/		REQUEST FOR INFORMATION	Vinyl or Rubber Base	
09/21/		WORK AUTHORIZATION	Change Order- Tile Replace	
10/21/		GENERAL	Carpet Maintenance Informa	
11/21/		WARRANTY	Warranty	

Changing Letter

Letter Status

Assigned To:

Assigned To Status: ☒ Accepted ☐ Requested ☐ Declined ☐ To Be Assigned

Priority: ☒ Low ☐ Normal ☐ High

Letter Status: ☐ Draft ☒ Sent Due Date:

Reminder: ☐ Reminder Date: Reminder Time:

Record Information

Inactive: ☐

Date Created: Created By: Date Edited: Edited By:

Viewing Rights: ☒ Public ☐ Private

Letter Date: Letter Type:

Title:

Notes:

Attention:

Salutation:

Regarding:

Closing:

Sent By:

Sent By Title:

CC:

PS Notes:

Related To & Letter Mailing Address

Type: Contract #:

Business: Contact:

Address 1: Address 2:

City: State: Zip:

Work Authorization letter

The original Contract Sum was \$62,000.00
 Net change by previously authorized Changed Orders \$2851.00
 The Contract Sum prior to this Change Order was \$64,851.00
 The Contract Sum will be increased by this Change Order in the amount of \$1000.00
 The new contract Sum including this Change Order will be \$65,851.00
 The Contract Time will be increased by 2 days.
 The Date of Substantial Completion as of the date of this Change Order therefore is October 22, 2010.

NOTE: This summary does not reflect changes in the Contract Sum or Contract Time which have been Authorized by

Remarks

Additional Related Records | Appointments | Tasks | Letters | Remarks | Interoffice Mail | Tests | Document History



Date	Created By	Remark
05/07/		Emailed Contact
05/17/		Printed several reports (all are in PDF History)
06/04/		Talk to Bob at Ellis Architect and he approved the tile that I cannot get a sample for.
11/22/		Emailed Contact
05/10/		Emailed Contact
05/10/		Emailed Contact

Changing Remark

Remark Information

Remark Type:

Remark - 500 Character Limit

Talk to Bob at Ellis Architect and he approved the tile that I cannot get a sample for.

Related To

Record Type:

Contract #:

Business:

Contact:

Phone #'s:

E-Mail:

Record Information

Interoffice Mail

Additional Related Records
Appointments
Tasks
Letters
Remarks
Interoffice Mail
Tests
Document History
Record Edits

View Mail

Date Sent	Reply By Date	To	From	Subject
05/17/				Spec changes are now available on this project.
05/18/				Spec changes are now available on this project.
05/10/	05/14/1			Please review Take Off/Layout seems off
05/10/	05/14/1			Please review Take Off/Layout seems off
05/10/	05/14/1			Please review Take Off/Layout seems off

Reply Not Sent

Mail Details

From:

To:

Other Recipients:

Subject:

Related Record:

Mail Status

Priority: ☐ Low ☐ Normal ☒ High

Reply Required: ☒

Reply By Date:

Reminder: ☐

Reminder Date:

Reminder Time:

Message

Sent: 05/10 4:26PM

CMM Project/HALE COUNTY CENTER/CONTRACTORS, INC

CG000033

Tests

Changing Test

Test Information

Test Type: **MOISTURE TEST**

Tested By: F8

Test Number: 1 Slab Temp: Air Conditioning On: ☒

Outside Temp: Slab PH: HVAC On: ☐

Details:

Test Status

Assigned To: F8

Related To

Record Type: **PROJECT** F8

Contract #: **CG000033**

Business: **CONTRACTORS, INC**

Contact: **DAVID DAWSON**

Phone #'s: **333-333-3333**

Email: **contractors4hire@msn.com**

Record Information

Date Created: **05/17/**

Created By:

Inactive

Document History

Additional Related Records | Appointments | **Tasks** | Letters | Remarks | Interoffice Mail | Tests | **Document History** | Record Edits

View PDF

☒ All ☐ Proposals ☐ Transmittals ☐ Requests ☐ Letters ☐ Workflow

Date Created	Time Created	Created By	Format	Type	Number	Description	Details
05/07	13:00:01	TERRY	PROJECT REPORT	PROPOSAL	1	PROPOSAL	CG900168
05/17	14:54:30	HGREEN	LETTER	LETTER		GENERAL	
05/17	14:58:24	HGREEN	PROJECT REPORT	TRANSMITTAL / SUBMITTAL	1	TRANSMITTAL - SUBMITTAL	CG900168
05/17	14:58:43	HGREEN	PROJECT REPORT	TRANSMITTAL / SUBMITTAL	2	TRANSMITTAL - SUBMITTAL	
05/17	15:01:13	HGREEN	PROJECT REPORT	REQUEST	1	REQUEST	
05/17	15:57:17	HGREEN	PROJECT REPORT	PROPOSAL	2	PROPOSAL	CG000028
05/17	18:15:17	RMASSEY	LETTER	LETTER		REQUEST FOR INFORMATION	
05/18	8:27:16	TERRY	LETTER	LETTER		WARRANTY	
05/18	8:35:48	TERRY	LETTER	LETTER		WARRANTY	
05/18	8:43:50	UNDEEN	LETTER	LETTER		WARRANTY	

WORKFLOW ACTIONS

Workflow Actions for Project

New Workflow Action Set Up Edit Workflow Action Set Up Delete Workflow Action Set Up

Workflow Action Filters

Search Fields: Contains: Assigned To: F8

Action Date: Action Type:

Private: ☒ Active: ☒ Outstanding: ☒

Public: ☒ Inactive: ☐ Completed: ☒

Table: ☐ All ☒ Projects ☐ Sales Leads

Action Date	Due Date	Action	Action Type	Assigned To	Related Record	Related Record Type
10/17/	0/17/	LEIN DOCS IN PLACE	SEND DOCUMENT	DANNY	HALE COUNTY CENTER	PROJECT
11/17/	1/11/	WARRANTY INFO	SEND DOCUMENT	TERRY	HALE COUNTY CENTER	PROJECT

EDIT/VIEW EXISTING WORKFLOW ACTION

SET UP FOR SPECIFIC PROJECT

Project:

Project Type:

Action:

Action Type:

Assigned To:

Attach PDF File:

Details:

Select Date or Event to Use to Calculate Action Date

Dates

- ☐ First Schedule Pro Line Install Date
- ☐ First Header Order Date
- ☐ First Header Est Del Date
- ☐ First Header Delivery Date
- ☐ First Header Invoice Date
- ☐ First Order Line Est Del Date
- ☒ First Provider Installation Date
- ☐ First Quote Date
- ☐ First Bid Pro Estimate Date
- ☐ First Proposal Report Date
- ☐ Project Estimate Date
- ☐ Project Start Date
- ☐ Project Complete Date
- ☐ Last Schedule Pro Line Install Date
- ☐ Last Header Order Date
- ☐ Last Header Est Del Date
- ☐ Last Header Delivery Date
- ☐ Last Header Invoice Date
- ☐ Last Order Line Est Del Date
- ☐ Last Provider Installation Date
- ☐ Blueprint By:
- ☐ Take Off By:
- ☐ Contract Award
- ☐ Submittal By:
- ☐ On Site Insp By:
- ☐ TBD

Events

- ☐ Every New Quote
- ☐ Every New Bid Pro Estimate
- ☐ Every New Order

Number of Days Before or After Date or Event (Negative = Days Before)

Record Information

Date Created: Date Edited: Inactive: ☐

Created By: Edited By:

Note the Date and # of Days Before or AFTER

ADD A NEW PROJECT WORKFLOW ACTION

SET UP FOR SPECIFIC PROJECT

Project:

Project Type:

Action:

Action Type:

Task Type:

Assigned To:

Remark:

Report:

Send Document:

Other:

Action Type to be Done

SET UP FOR SPECIFIC PROJECT

Project

Project Type

Action

Action Type

New Status

Assigned To

Project Statuses

EXIT [Icons] Show

Order | Project Status

Project Status
01-BIDDING
02-AWARDED
03-SUBMITTALS
04-MATERIAL ORDERED
05-JOB SITE INSPECTION
06-INSTALL STARTED

ACTION TO HAPPEN: Change the Status

NEW STATYS WILL BE automatically to Install Started

SET UP FOR SPECIFIC PROJECT

Project

Project Type

Action

Action Type

New Status

Assigned To

Outcome
SALESPERSON
PROJECT MANAGER
CREATED BY

Assigned To:

Who will need to perform the action or be notified of it.

Select Date or Event to Use to Calculate Action Date

Dates

☐ First Schedule Pro Line Install Date
☐ First Header Order Date
☐ First Header Est Del Date
☐ First Header Delivery Date
☐ First Header Invoice Date
☐ First Order Line Est Del Date
☒ First Provider Installation Date
☐ First Quote Date
☐ First Bid Pro Estimate Date
☐ First Proposal Report Date
☐ Project Estimate Date
☐ Project Start Date
☐ Project Complete Date

☐ Last Schedule Pro Line Install Date
☐ Last Header Order Date
☐ Last Header Est Del Date
☐ Last Header Delivery Date
☐ Last Header Invoice Date
☐ Last Order Line Est Del Date
☐ Last Provider Installation Date
☐ Blueprint By:
☐ Take Off By:
☐ Contract Award Date
☐ Submittal By:
☐ On Site Insp By:
☐ TBD

Events

☐ Every New Quote
☐ Every New Bid Pro Estimate
☐ Every New Order

Number of Days Before or After Date or Event (Negative = Days Before)

Select DATE OR EVENT that will PROMPT the action to happen.

Enter the Number of Days

- 1= 1 Day BEFORE

+1= 1 Day AFTER

SET UP FOR SPECIFIC PROJECT

Project

Project Type

Action

Action Type

New Status F8

Assigned To

Generate Reports

General Tab

Projects>Select Project>Reports>General Tab

These reports are not tracked on the report history tab.

Project Reports for PROJECT NAME-BID ONLY



☒ Preview
 Output To:
 ☒ Printer
 ☐ Email PDF
 ☐ PDF
 ☐ MS Word
 ☐ MS Excel

General | Proposals & Change Orders | Baseline | Transmittals, Submittals & Requests

General Reports

☐ Tests
☐ Installation Forecast
☐ Status of Quotes, Bid Pro Estimates & Orders by Salesperson
☐ Products Used by Salesperson
☐ All Change Orders

Test

Moisture Test is sorted by Test Number, Canister Number.

Moisture Test Results

Contract Number: _____ Contact: _____
 Project Name: NAME Work: _____
 Primary Customer: INFO Mobile: _____
 Address: _____ Business: _____
 Other # _____
 Email: _____

Test Number: 1 Air Conditioning On: ☒ HVAC On: ☒ Completed: ☒
 Tested By: KLEE

Canister #	Protimeter	Start Qty	StopQty	vWeightGain	StartTime	Stop Time	Hours	Emission
1		1.00	2.00	0.00	12:00 PM	1:00 PM	0.00	0.00

Details:

Installation Forecast

This report will print all service lines for open jobs related to the selected **project showing estimated install dates and revenue.**

Status of Quotes, estimates and orders by salesperson.

The sample status of all quotes, bid pro estimates and orders report is the page for one salesperson on the project. The subtitles were changed from just the record type to Generated From (record type)

Generated from Bid Pro Estimates

The report will list first in the top section, any Bid Pro estimates related to the project. If an estimate was converted to an order, the order will be listed to the right. Otherwise the section will say NO ORDER.

Generated from Quotes

The next section of the report lists quotes related to the project. If a quote was converted to an order, the order will be listed to the right. Otherwise the section will say NO ORDER.

Generated from Orders

Change orders have a C next to the Order number.

The final section lists orders which did not originate as either a Bid Pro estimate or a Quote.

Status of Products Used by salesperson

This report gives the status of all material lines for the selected project so that potential problems with the material can be avoided. This report will break on salesperson. The report has a section each for related Bid Pro estimates, Quotes and Orders.

All Change Orders

A report has been added that will print all change orders related to the selected project.

CHANGE ORDERS									
Customer: vWar Construction A Jackson Post Office Box 1218 Tuscaloosa AL 35403					Project Information: Project Name: Hillcrest Middle School Contract Number: CONTRACT # Status: Bidding JOB Info: Job Info User Field 1: 1 User Field 2: 2 User Field 3: 3 Estimate Date: 10/13/1 Date 1: Date 2: Date 3:				
Order # 76143 Description Request # Status: NA					Requested By Received By Approved By Date Approver				
Style	Color	Qty	Units	Status	Cost	Price	Total		
MISCELLANEOUS		1.0	EA	Job Costed	0.00	450.00	450.00		
Totals									
Cost	\$0.00	Materia	\$0.00	Service	\$450.00	Misc	\$0.00	Tax	\$0.00
						Order	\$450.00		
Order # CG002129 Description DE Request # Status: NA					Requested By BY Received By Approved By KLEE Date Approver 09/15/1				
Style	Color	Qty	Units	Status	Cost	Price	Total		
		0.0			0.00	0.00	0.00		

Report-Proposal

General | Proposals & Change Orders | Baseline | Transmittals, Submittals & Requests

☒ Proposal ☐ Change Order

Select Report Template

PROPOSAL

F8

Select Quote, Bid Pro Estimate or Order

TEMPLATE-1

Report Print Options

- ☒ Quantities
- ☒ Unit Prices
- ☒ Line Totals
- ☒ Proposal Total
- ☒ Proposal Total Details
- ☒ Line Notes
- ☒ Custom Note

Tag Lines to Print



Line #	PC	Roll/Item #	Style/Item Name	Color	Qty	Price	Total	Status	Est Del Date
1	06	XXXX441P	SEMIGLOSS-1/TILE-F	MAYAN WHITE	30.00	1.67	50.10		
2	06	6X6	6X6 TILE	WALL TILE	180.00	0.89	160.20		
3	06	A4200	A4200	2X6 TRIM	150.00	0.42	63.00		
4	06	AK4200	AK4200	CORNER TRIM	2.00	0.29	0.58		
5	06	SHOWER PAN	SHOWER PAN	6X8	1.00	30.00	30.00		
6	06	THIN SET	THIN SET	BAG	4.00	9.99	39.96		
7	06	UN SAN GROUT	UNSANDED GROUT	BAG	1.00	9.99	9.99		
8	06	3X5	BACKER BOARD 3X5		15.00	9.01	135.15		
9	06	TOWEL BAR	TOWEL BAR		1.00	14.95	14.95		

PROPOSAL

Proposal Number:

Customer:

Customer's Name
CONTACT#1
Customer Address #1
Customer Address #2
Customer City ST ZIP_

Ship To:
Ship To Address
Lynwood WA 98037

Project Information:

Project Name: Project Name-bid Only
Salesperson:
Based on Estimate: TEMPLATE
Contract Number:
Status: Proposal Submitted
Job ID: Contacts/
Contractor: Internal Roles
Site Super: External Roles
Project Manager:
Estimate Date: 07/20/
Blue Prints: 07/02/
Take Off: 07/06/

Style	Color	Supplier	Qty	Units	Price	Total
6X6 TILE	WALL TILE	GENERIC	180.00	SF	0.89	160.20
A4200	2X6 TRIM	GENERIC	150.00	EA	0.42	63.00
AK4200	CORNER TRIM	GENERIC	2.00	EA	0.29	0.58
BACKER BOARD 3X5		DAL-TILE	15.00	EA	9.01	135.15
CORNER SHELF		GENERIC	1.00	EA	14.95	14.95

Baseline Reports

General | Proposals & Change Orders | **Baseline** | Transmittals, Submittals & Requests

Select Order
CG701569

 **Baseline Functions & Reports**

  **Baseline Operations & Reports**   

This Order is Part of a Billing Group

Baseline for Individual Order

Order Number CG701569

Baseline for Order Exists ☒

Create Baseline

Delete & Replace Baseline

Reports for Individual Order

☐ Compare Baseline to Actual

☐ Compare by Product Code

☒ Compare by Style

☒ Compare by Material Type

☒ Baseline VS Progress

☒ Discrepancies between Baseline and Actual

 Print Preview

 Print

Baseline for Billing Group

Primary Order Number CG701569

Baseline for Billing Group Exists ☐

Billing Group in Contract ☐

Create Baseline

Delete & Replace Baseline

Reports for Billing Group

☐ Baseline VS Progress Report

☐ Discrepancies between Baseline and Actual

 Print Preview

 Print

Transmittals, Submittals & Requests

Project Reports for PROJECT NAME-BID ONLY

EXIT ☒ Preview Output To ☒ Printer ☐ Email PDF ☐ PDF ☐ MS Word ☐ MS Excel Output Director

General | Proposals & Change Orders | Baseline | **Transmittals, Submittals & Requests**

☐ Transmittal/Submittal ☒ Request

Select Report Template
REQUEST F8

Attention
Terry Wheat

Requested By
SALES REP1

Reasons For Request

- ☐ Request for Proposal
- ☐ Request for Information
- ☒ Request for Specifications
- ☐
- ☐
- ☐
- ☐
- ☐

Possible Outcomes

- ☒ Possible Outcomes 1
- ☐

Copies	Date	Description	Remarks
0	07/26/12	Please provide information to clarify the specifications for materials. Safety floor has thickness that doesn't match up to the Schluter described. Is there a substitution allowed?	Remarks for the Request being made

Adding Line

Description

Please provide information to clarify the specifications for materials. Safety floor has thickness that doesn't match up to the Schluter described. Is there a substitution allowed?

Remarks

Remarks for the Request being made

REQUEST

Customer:

Customer's Name
CONTACT#1
Customer Address #1
Customer Address #2
Customer City ST ZIP_

Ship To:

Project Information:

Project Name: Project Name-bid Only
Salesperson:
Contract Number:
Status: Proposal Submitted
Job ID: Contacts/
Contractor: Internal Roles
Site Super: External Roles
Project Manager:
Estimate Date: 07/20/12
Blue Prints: 07/02/12
Take Off: 07/06/12
Bid Prepared: 07/16/12

Request Number: 1

Attention: Terry Wheat
Requested By: SALES REP1

Reason(s) For Request:

Request for Specifications

Copies	Date	Description	Remarks
0	07/26/12	Please provide information to clarify the specifications for r	Remarks for the Request being made

Possible Outcome(s) from Requested Information:

Possible Outcomes 1

Transmittal/Submittal

Project Reports for HALE COUNTY CENTER

EXIT ☒ Preview Output To ☒ Printer ☐ Email PDF ☐ PDF ☐ MS Word ☐ MS Excel Output Directory C:\ F8

General | Proposals & Change Orders | Baseline | **Transmittals, Submittals & Requests**

☒ Transmittal/Submittal ☐ Request

Select Report Template
SUBMITTAL F8

Attention
Jim Smith

Transmitted / Submitted By
TERRY WHEAT F8

Transmittal / Submittal Method
☒ Attached ☐ Under Separate Cover

Copies	Date	Description	Remarks
1	05/17/10	CPPT 1 - Color Play 59358, Sh	
1	05/17/10	VCT 1 - Imperial Texture, Armst	
1	05/17/10	VB 1 - 4" Rubber Rolled Base,	

Transmittal / Submittal Items

☐ Bid
☐ Contract
☐ Scope of Work
☐ Style/Color Approval
☐ Specifications
☐ Material Warranty Information
☐ MSDS
☒ Samples
☐ Drawings/Blue Prints
☐ Seam Placement

☐ Bond
☐ Insurance Certificate
☐ Copy of Letter
☐
☐
☐
☐
☐
☐
☐

Transmittal / Submittal Reasons

☐ For Your Information
☐ For Signature
☐ For Notary
☒ For Approval
☐ For Your Use
☐ As Requested
☐ For Review and Comment
☐ Approval as Note
☐ Returned for Corrections
☐ Resubmit Copies for Approval

☐ Schedule for Delivery
☐ Acknowledge Delivery Date
☐ Print Returned after Loan to Us
☐
☐
☐
☐
☐
☐

SUBMITTAL

Transmittal Number: 4

Customer:

CONTRACTORS, INC
David Dawson
365 Selma Road
Suite 15
Charleston SC 29406
444-444-4444

Ship To:
98743 Crows Landing Lane
Tuscaloosa AL 35401

Project information:

Project Name: Hale County Center
Salesperson: Terry Wheat
Contract Number: CG000033
Status: 04-material Ordered
CO Number:
Architect: Jim Cohen
General Contractor: Ellis Architects, Inc
Owner: Multiple**
Estimate Date: 09/02/10
Blueprint By: 08/20/10
Take Off By: 08/24/10
Contract Award: 09/08/10

Attention: Jim Smith
Transmitted By: TERRY WHEAT

Attached are the following items:

Samples

Copies	Date Sent	Description	Remarks
1	05/17/10	CPPT 1 - Color Play 59358, Shaw, Metal Guru 58595	
1	05/17/10	VCT 1 - Imperial Texture, Armstrong, 51875 Midgrayed Blue	
1	05/17/10	VB 1 - 4" Rubber Rolled Base, Roppe, P193 Black Brown	

Reason items are being transmitted:

For Approval

Copy To: _____

Signed: _____

Approved: _____

Date Material Required: _____

The above Shop Drawings, Product Data, and/or Samples are returned with action as designated above in accordance with the following legend:

A-Reviewed

B-Reviewed: Incorporate Changes

C-Reviewed Only for Revisions to Previous Submittal

A-Revise and Resubmit

