



How to Process the Sold Project Package

HOW TO PROCESS THE SOLD PROJECT PACKAGE

1. Receive email request from Contract Sales including the following:

- AQ Signed Proposal and Spreadsheet
- Completed Job Control Sheet (JCS)
- Trimark Drawing or External Drawing
- Sold Project Project Pricing Tool (PPT)
- Design Letter if applicable
- Deposit Check if applicable or note if deposit has been sent to credit
- Completed New Account Form for New Customer
 - Existing customers should have a business chain number which can be extracted from Lawson and added to the JCS
- If the project is AIA, GC Contract or Customer PO should be included or noted of when to expect these to be sent to Trimark.

Job Control Sheet – Trimark United East

| | | | | | | | |
|--|------------------------------|--------------------------------|----------------------|-------|--|----------------------|------------|
| Customer # | | Job Name | GOOSENECK VINEYARDS | Job # | | Form Completion Date | 06/25/2024 |
| Trimark Team | | | | | | | |
| Sales Rep / Site | Ray Carmadello | Territory Salesperson | Mike Krause | | | | |
| Project Engineer | Brenda Calvao | Project Manager (responsible) | Ed Generali | | | | |
| Project Coordinator | (Select Project Coordinator) | Project Estimator | Hannah Rochon | | | | |
| Credit | (Select Credit Team Member) | UE Contracts | (Select UE Contract) | | | | |
| Type of Customer | | | | | | | |
| Customer Type | Design Build | Project Type | Owner | | | | |
| New/Existing | New | Customer Group | 003 Entertainment | | | | |
| Customer / Job Information | | | | | | | |
| Business Chain # | | Customer Location # | | | | | |
| Billing Terms | 0045/5 | Retainage Percentage | | | | | |
| Contract | | | | | | | |
| Subtotal of Contract | \$ 51,533.75 | | | | | | |
| Estimated Tax | \$ 3,470.86 | | | | | | |
| Total Contract Amount | \$ 55,004.61 | | | | | | |
| Energy Rebate Amount (if applicable) | | | | | | | |
| Total Contract Amount (w/rebates) | \$ 55,004.61 | | | | | | |
| GMR Totals | | | | | | | |
| Estimated GMR Dollars (\$) | \$ 14,814.00 | Estimated GMR Percentage (%) | 28.5 | | | | |
| Anticipated Delivery / Completion Dates | | | | | | | |
| Anticipated Delivery Date(s) | 8-16-24 | Anticipated Completion Date(s) | 8-23-24 | | | | |

| ALL questions must be answered | YES | NO | N/A |
|--|-------------------------------------|-------------------------------------|--------------------------|
| Tax Exempt? | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Deposit Invoice Required? | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Bid, Bond, or Performance Bond Needed? | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Design Fee? | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Resale Certificate? | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| AIA Contract? | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Prevailing Wage? (if yes, attach PW rates & subcontractor PW contracts) | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Union Wage? | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Program Business? | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| OCIP/PCIP INS? | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Job Control Sheet – Trimark United East

| | | | | | | | |
|---|-------------------------------------|----------|---------------------|-----------------------------|-------------------------------------|----------------------|------------|
| Customer # | | Job Name | GOOSENECK VINEYARDS | Job # | | Form Completion Date | 06/25/2024 |
| Billing Information | | | | Shipping Information | | | |
| Bill to Address | GOOSENECK VINEYARDS OCA COLLA, LLC | | | Ship to Address | GOOSENECK VINEYARDS OCA COLLA, LLC | | |
| | P.O. BOX 282 | | | | 1340 TOWER HILL ROAD | | |
| | NORTH KINGSTOWN, RI 02852 | | | | NORTH KINGSTOWN, RI 02852 | | |
| Contact Name | | | | Contact Name | PAUL FEDE | | |
| Phone Number | | | | Phone Number | 401-487-5290 | | |
| Email Address | | | | Email Address | paul@gooseckvineyards.com | | |
| Drop Ship to Offsite Warehouse? (If YES, please be sure address is filled in correctly with name of warehouse, contact name, and phone # below) | | | | Yes | No | | |
| | | | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Ship to Address | | | | Contact Name | | | |
| | | | | Phone Number | | | |
| | | | | Email Address | | | |
| Construction Contact Information | | | | | | | |
| Construction Manager | BEHAN BROTHERS INC. | | | Phone Number | 401-855-2777 | | |
| Contact Name | TREVOR MIERTA | | | Email Address | TMierta@behanbros.com | | |
| Sold Document Checklist (must check all that apply) | | | | | | | |
| Contract PO | <input type="checkbox"/> | | | | | | |
| Design – PM – Installation Estimate Sheet | <input checked="" type="checkbox"/> | | | | | | |
| Deposit | <input checked="" type="checkbox"/> | | | | | | |
| Credit App | <input checked="" type="checkbox"/> | | | | | | |
| AQ File (must match contract) | <input type="checkbox"/> | | | | | | |
| Tax Exempt Certificate | <input type="checkbox"/> | | | | | | |
| Other Contract Documentation / General Conditions | <input type="checkbox"/> | | | | | | |
| SA or Applicable Contract / Program Identified | <input type="checkbox"/> | | | | | | |
| ONLY COMPLETE THIS SECTION IF PROGRAM BUSINESS = YES | | | | | | | |
| Program / Contract / GPO Name | | | | | | | |
| Was this a competitive build process? (If YES, please include other bidders info) | | | | | | | |
| Status Codes | | | | | | | |
| Is this Supply America Customer? (If YES, please fill out the next 5 rows) | | | | | | | |
| SA Customer Number (bill to) | | | | | | | |
| SA Customer Number (ship to) | | | | | | | |
| EDI | | | | | | | |
| SA Unit / Entity Number (bill to) | | | | | | | |
| SA Unit / Entity Number (ship to) | | | | | | | |
| | | | | Signature | | Date | |
| Credit Mgr. | | | | | | | |
| VP Project Operations | | | | | | | |
| Sales Manager Signature | | | | | | | |

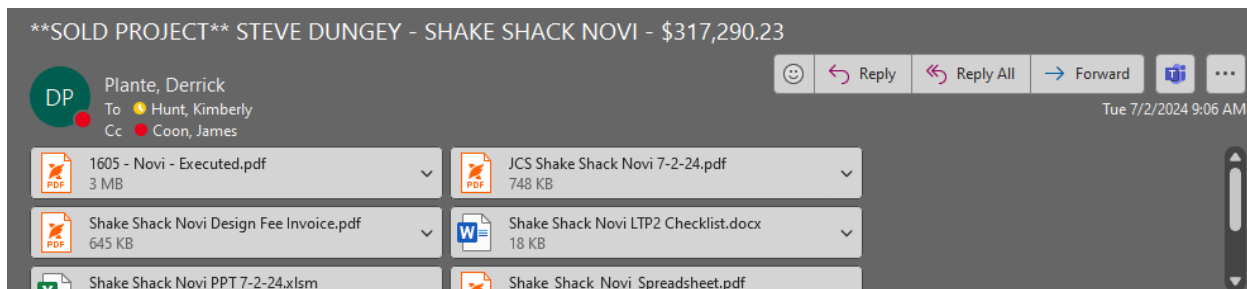
Clear Form

Save As

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2. PC MGR reviews all documents for completion and accuracy.
3. Open JCS first to review all fields below have been entered. PC and PM will not be assigned at this point and Customer # and Job # will be blank.
4. Open AQ Proposal and confirm that this document was SIGNED by the Customer and the total matches the contract amount total on the JCS. Also, contract terms should match the contract terms listed on the JCS as well.
5. Open the Sold PPT and ensure the following: Project Status is SOLD (not QUOTE) and Install Date is entered. Confirm GMR \$ and % matches the JCS amounts.
6. Click "Send to Deal Desk" which will automatically generate an email template for this specific project to be sent to the Trimark UE Deal Desk. Review details then send email.
7. Send Request to assign a PC to Deb Cahir and PM to Jim Yankos. Once assigned, please add to the JCS.
8. Once package has been reviewed, send a new email with all documents to Kim Hunt and copy Jimmy Coon. Kim will review and sign the JCS. Subject of email should read as follows and changed based on project specifics:

a. ****SOLD PROJECT** CONTRACT SALESPERSON NAME – PROJECT NAME AND CITY, STATE – TOTAL CONTRACT AMOUNT**



Kim,

Please review and sign.

Thank you,



Derrick Plante, CFSP
 Manager, Project Coordination
 9 Hampshire St. Mansfield, MA 02048
 M: 508-431-4798
derrick.plante@trimarkusa.com | Visit us at: trimarkusa.com



| | | | | | | |
|----------------------|----------|---------------|--|--|-------------------------------------|---------|
| Install Date: | Aug 2024 | FACTS Number: | | Competitor 3: | (select competitor) | Neutral |
| Payment Terms: | 50/45/5 | | | Competitor 4: | (select competitor) | Neutral |
| Location of Project: | 02652 | | | Competitor 5: | (select competitor) | Neutral |
| Decision Maker: | End User | | | Potential Distribution/Smallwares: | Potential opportunity being pursued | |
| Vendor Deposit: | None | | | Estimator: | Rochon, Hannah | |
| | | | | Supplemental Info/ Reasons for Approval: | new client from Behan Brothers | |

| | | | |
|--|-------|-------|--|
| Freight / Install Markup | | | |
| Net freight (item-level) | | \$550 | Only freight entered at the item-level will show (net freight for each item) |
| Net install (item-level) | | \$0 | Only install entered at the item-level will show (net install for each item) |
| Current freight / install mark-up (% and \$) | 45.0% | \$247 | |
| New freight / install mark-up (% and \$) | | | Change the input in the yellow cell to increase markup on freight / install to see impact on profitability |

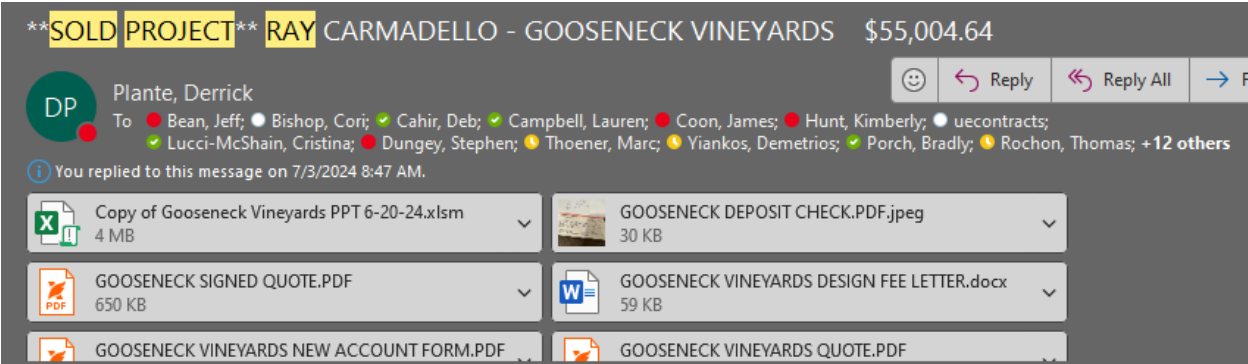
| | | | |
|--|------|-------|--|
| Future Vendor Cost Increase | 0.0% | \$0 | Change the input in the yellow cell to increase vendor cost by percentage |
| Project Margin Opportunity | 0.0% | \$0 | Change the input in the yellow cell to increase margin opportunity for the entire project |
| Anticipated Discounts | 0.0% | \$0 | Added discount in the "Anticipated Discount" column to see impact of post-bid margin improvement on profitab |
| Spec Credits | 0.0% | \$0 | Added discount in the "Spec Credits" column to see impact of spec credit margin improvement on profitability |
| Year End Volume & Growth Rebate Bon | 0.7% | \$354 | Additional year end rebate that is not guaranteed and not included in the GMR calculation |

| | | | |
|-------------------------------|-------------|--------------|--------------------|
| Key project financials | Original AQ | With Changes | |
| Project price | \$51,834 | \$51,834 | Excludes sales tax |
| GMR % | 28.6% | 28.6% | |
| GMR \$ | \$14,814 | \$14,814 | |
| Preferred Vendor Index (PVI) | 1.34 | 1.34 | |

Target: 34.4%

GMr Below Target

9. Once sent by Kim Hunt, send a new email to the project team along with multiple other contacts at United East. The estimating manager will assign a flipper for the project at this point. Body of email should include:
- a. Project name of sold job
 - b. Request to schedule a kickoff
 - c. Salesperson, PC, PM, Estimator, and Engineer
 - d. Total sale amount



Please find the **sold** job package for GOOSENECK VINEYARDS

Kindly schedule a kickoff.

Sales – **Ray** Carmadello
PC – Emily Casler
PM – Ed Generali
Estimator – Hannah Rochon
Engineer – Brenda Calvao

Total sale - \$55,004.64

Thank you,



Derrick Plante
Manager, **Project** Coordination
9 Hampshire Street, Mansfield, MA 02048
M: 508-431-4798
derrick.plante@trimarkusa.com | Visit us at: trimarkusa.com

[f](#) [in](#) [X](#) [ig](#) [@](#) [p](#) [v](#)

10. Open Project Monitor 2024 (J drive) (Live document so make sure to close out of this when you are done). Add all project information that you are able to enter.

| | | | | | | | | | | | | | | |
|---------------------|--------|--------|-------|-------------|---------|--------------|----------|----------|---------|----------|----------------|----------------------|-------------------|----------------|
| TODAY'S DATE | | | | | | | | | | | | | | |
| 07-03-24 | | | | | | | | | | | | | | |
| DATE | | | | | | | | | | | | | | |
| | | CREDIT | | | | | REC'D BY | | | PROJECT | SENT TO CREDIT | REC'D BY PROJ. ADMIN | PROJECT CONVERTED | SENT BACK TO |
| | QUOTE | REP | CUST | PROJECT | PROJECT | SOLD PROJECT | PROJECT | ASSIGNED | CUST NO | KICKOFF | BY PROJ. | FROM | BY | PROJ. COOR |
| | NUMBER | | NO | COORDINATOR | MANAGER | REC FROM FED | FLIPPER | FLIPPER | SET UP | MEETING | COOR. / MGT. | CREDIT | PROJ. ADMIN. | BY PROJ. ADMIN |
| PROJECT NAME | | | | | | | | | | | | | | |
| Laney's Get Down | | | Chris | 10041563 | | | | | | | | | | |
| Gooseneck Vineyards | | 66189 | | 10041551 | Emily | Ed G | 06/27/24 | 06/27/24 | Hannah | 06/27/24 | 07/09/24 | 07/01/24 | | |

11. Send a new email to Summize@trimarkusa.com and only include: Signed AQ Proposal, Signed JCS, and GC contract and Design Invoice/Agreement if applicable

