

Lead Tab

1

- To create a new project form, click on the green “+!” button

The screenshot shows the top portion of the 'Project Information Sheet' form. The title 'Project Information Sheet' is in green. Below the title, there is a navigation bar with a left arrow, the number '4969', a green '+!' button circled in red, a right arrow, and a 'Search Word:' field. Below this, the 'Project Name' field contains 'Vedere' and has a tooltip that says 'Add New Project'. The 'Street Address' field contains '1 Design Center Place' and the 'Floor(s) / Suite:' field is empty.

- A blank form will open

The screenshot shows the full 'Project Information Sheet' form. The title is 'Project Information Sheet' and it is initiated by 'regan'. The job number is '00000'. The form contains various fields for project information, including 'Project Name', 'Street Address', 'Floor(s) / Suite', 'City', 'State', 'Zip', 'Project Status', 'Bid/Proposal Type', 'Interview Date', 'Walk-Thru Date', 'RFP', 'CM', 'O.C.I.P.', 'Builder's Risk', 'M/WBE', 'Cert PRM/WBE', 'Market Sector(s)', 'Project Type(s)', 'Project Team', 'Project Executive', 'Project Manager', 'Superintendent', 'General Super.', 'Assistant PM', 'Chief Estimator', 'Head Est./VDC', 'Trades', and 'Detailed Marketing Description'. The 'Permitting Description' field is highlighted with a red box.

2

- Complete all blue fields
 - *NOTE- Square footage can be found on the bid sheet from the Preconstruction department
 - "Permitting Description" should be brief

The screenshot shows the full 'Project Information Sheet' form. The title is 'Project Information Sheet' and it is initiated by 'regan'. The job number is '00000'. The form contains various fields for project information, including 'Project Name', 'Street Address', 'Floor(s) / Suite', 'City', 'State', 'Zip', 'Project Status', 'Bid/Proposal Type', 'Interview Date', 'Walk-Thru Date', 'RFP', 'CM', 'O.C.I.P.', 'Builder's Risk', 'M/WBE', 'Cert PRM/WBE', 'Market Sector(s)', 'Project Type(s)', 'Project Team', 'Project Executive', 'Project Manager', 'Superintendent', 'General Super.', 'Assistant PM', 'Chief Estimator', 'Head Est./VDC', 'Trades', and 'Detailed Marketing Description'. The 'Permitting Description' field is highlighted with a red box.

Lead Tab

3

- Change Yes/No boxes as necessary
 - ***NOTE- Yes/No section will default to "No"**

The screenshot shows a software interface with a 'Lead Tab'. At the top, there are two tabs: 'RFP' and 'RFQ'. Below the tabs, there are several rows of fields. The first row has 'CM' and 'Prevailing Wage', both with 'No' dropdown menus. The second row has 'O.C.I.P.' and 'Green/LEED', both with 'No' dropdown menus. The third row has 'Builder's Risk' and 'Bond Required', both with 'No' dropdown menus. The fourth row has 'Cert.PR/MWB' and 'Tax Exempt', both with 'No' dropdown menus. Below these rows, there is a 'Project Team:' section with a 'Project Executive' field. To the right of the main form, there are several checkboxes and labels, including 'Const' and 'Contr'.

4


- Complete the "Market Sector(s)" section
 - There is typically only one sector per job
- Complete "Project Type(s)" section.
 - Select all that apply

The screenshot shows a software interface with two sections: 'Market Sector(s):' and 'Project Type(s):'. The 'Market Sector(s):' section has a list of checkboxes: Interiors/Sp. Project, Academic, Commercial/Developer, Government, Healthcare/Sciences, Historic, Residential, and Retail. There is also a 'M.Fldr' field with a dropdown menu. The 'Project Type(s):' section has a list of checkboxes: Apt/Condo, Assist. Living, Athletic, Bank, Classroom, Dining/Resturant, Dorm, Garage/Parking, Lab/Research, Theater/Entertainment, Hotel, Law Firm, Library, Medical, Museum, Nonprofit, Offices, Religious, Retail, and Other ...

Lead Tab

5

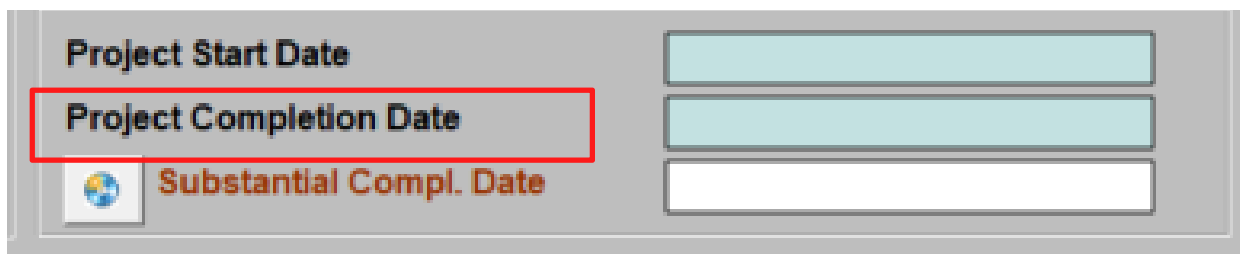
- **Permit cost will not always match initial value, permit costs are typically only soft costs.**
 - **Current/final contract value should be updated monthly**



A screenshot of a software interface with a grey background. On the left, there are three text labels: "Value to Base the Permit on", "Initial Value", and "Current/Final Contract Value". The "Current/Final Contract Value" label is highlighted with a red rectangular border. To the right of these labels are three light blue input fields. To the right of the input fields are three buttons: a yellow button with a plus sign, a grey button with a minus sign, and a grey button with a percentage sign. Below the percentage button is a white button with a yellow lightning bolt icon.

6

- **Once your project starts, go in and update your start date**
- **Project completion date may need to be updated throughout the life of the project**



A screenshot of a software interface with a grey background. On the left, there are three text labels: "Project Start Date", "Project Completion Date", and "Substantial Compl. Date". The "Project Completion Date" label is highlighted with a red rectangular border. To the right of these labels are three light blue input fields. To the left of the "Substantial Compl. Date" label is a small globe icon.

Lead Tab

7

- **Complete the "Detailed Marketing Description". This should be very detailed. It can include:**
 - **Anything that is unique about the job (i.e- finishes, design, building)**
 - **Anything that is challenging about the job (i.e- site logistics)**
 - **Types of spaces**
 - **Unique aspects to highlight the project**
 - ***NOTE- This box is not limited on space. It will get bigger with more text. The more detail for marketing, the better.**

Head Est./VDC Substantial Compl. Date

Trades:

<input type="checkbox"/> Sitework	<input type="checkbox"/> Masonry	<input type="checkbox"/> Doors	<input type="checkbox"/> Ceiling	<input type="checkbox"/> Flooring	<input type="checkbox"/> Plumbing	<input type="checkbox"/> Sprinkler	Other:
<input type="checkbox"/> Concrete	<input type="checkbox"/> Metals	<input type="checkbox"/> Glass	<input type="checkbox"/> Drywall	<input type="checkbox"/> Paint	<input type="checkbox"/> HVAC	<input type="checkbox"/> Electrical	<input type="text"/>

Detailed Marketing Description: