









SOP Reference #: CS001

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|------------------------|--|--------------------------|---------------|--------------------|-------------------------|
| Operation/Task: | Electronic Request for Estimates (RFE) | | | Equipment: | N/A |
| Owner: | Client Services Manager | Date Prepared: | 3/19/20 | Department: | Sales / Client Services |
| | | Revision History: | See last page | | |

ALERTS (see below): Critical Step  Quality Check  Tip  Team Safety 

Purpose: This SOP/work instruction describes the process of submitting an electronic/paperless Estimate Request.

| Step # | Alerts | Step Description - "What to Do" | "How to Do it" | "Why to Do it" |
|--------|---|--|---|---|
| 1 |   | Fill out the correlating electronic RFE Form Forms available on the Intranet under Estimating - Forms (**Acrobat Reader is required) | Fill out: For Print: EST009 Job Jacket RFE For Mail: MAIL048 DP Estimate Jacket For both Print/Mail: EST009 MAIL048 Combined RFE Capture all necessary specifications prior to submitting. Review all forms before submitting to Estimating. | Provide Estimating clearly defined expectations to ensure accurate and efficient processing of RFE submissions. This is important as it will minimize questions on vague or conflicting information once in Estimating. |
| 2 | | Save and Submit – save a copy for your reference, then submit RFE to Estimating | Email: Sales send to RFE rfeb@alwaysevenpointe.com <i>Do not send to an individual</i> | To properly route for efficient processing of request. |
| 3 |   | Estimating – Process and return to Requestor | Estimate and Quote Letter will be returned via email to the Requestor. <ul style="list-style-type: none"> Prior to the quote being submitted to the customer it must be reviewed for accuracy, by verifying final price(s). Estimating will retain a saved copy of the estimate for future accessibility and reference by the Estimating Team. | Quotes are client facing documents and estimates are used internally. It's important a review and verification is done prior to sending to the client. |

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| 4 | | REVISED RFE | Fill out: EST003 RFE REV Print EST004 RFE REV Lettershop Indicate revisions to previous Estimate # | Provide Estimating clearly defined expectations to ensure accurate and efficient processing of RFE submissions. This is important as it will minimize questions on vague or conflicting information once in Estimating. |
| 5 | | Save and Submit – save a copy for your reference, then submit RFE to Estimating | Email: Sales send to RFE rfebp@alwayssenpointe.com <i>*Do not send directly to the Estimator who provided the previous estimate</i> | To properly route for efficient processing of request. |
| 6 | ◆☑ | Estimating – Process and return to Requestor | Estimate and Quote Letter will be returned via email to the Requestor <ul style="list-style-type: none"> Prior to the quote being submitted to the customer it must be reviewed for accuracy, by verifying final price(s). Estimating will retain a saved copy of the estimate for future accessibility and reference by the Estimating Team | Quotes are client facing documents and estimates are used internally. It's important a review and verification is done prior to sending to the client. |
| 7 | ◆☑ | Submitting job to CSR Fill out the Job Initiation Form and email to your CSR. <i>Please partner with your CSR on what electronic documents work most efficiently when submitting jobs. The goal is to ensure clear accurate information is shared so the job submission can be processed and moved forward seamlessly.</i> | Enter final estimate # in Job Initiation Form: Job Initiation Form If filled out completely and accurately, this form is all that is required by the CSR. If you have an electronic PO, you may attach that in your email to the CSR as well | This ensures the job details are clear and helps streamline processing of the job. It also eliminates error and slowdowns due to lack of job details, assumption and back and forth communications between CSR and Sales. |
| Notes: | | | | |

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| Definitions: |
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| Revision History | Description of Changes | Requested by | Date |
|------------------|---------------------------|-------------------|---------|
| Rev 1 | First posting to intranet | Michelle Motschke | 3/20/20 |

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|-------|---|------------|---------|
| Rev 2 | Updated to current SOP format: gray header bar; branding updated: font size/type, changed GLS reference to ENPOINTE; changed form numbers in Step 1 How To Do It. Changed Owner to Client Services Manager. | Liz Nourse | 4/19/21 |
| Rev 3 | Removed references to STP | Liz Nourse | 6/9/23 |

CI035

Rev. Date 4/20