Insert AD
Text Here

Stone Legends goal is to Marry
Budget, Time and Value…

We call it
“Getting everyone on the same page”!

SITE CONTROL

The Field Notebook
for:

<First Name> <Last Name>

Project:

<Project Name>

It is Cast In Stone!

Field Notebook Introduction & Overview

Getting everyone on the same page.

"What do you mean... You need more decisions made, more information, more _____? Do I need to get an assessment?"

To meet your goals, we need a bit of information. The purpose of the Field Notebook is to give us a place to store all of the information and keep the project on track. Simple, if you know the right questions to ask.

Helpful Hint:

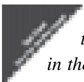
Look for this symbol:

(?)

It identifies specific tasks to be completed. From these few answers, we formulate all other specifics.

Helpful Hint:

T A S K S



Many of the pages in this notebook have "TASK" in the upper right-hand corner. When the tasks on that page are complete, tear off or bend over the tab. This lets you see immediately what tasks remain. Timely response is essential to keep your project on schedule.

Helpful Hint:

Its a good practice to keep a three ring binder. This allows you to fax out or insert pages, as sometimes the plan changes. Keep your copy.

This notebook serves as a
Project Planning Book*,*
gathering and tracking specific time sensitive information.

The Field Notebook simplifies **information gathering,** allowing us to manage your project more efficiently. Using a simple process, we identify stone requirements, and then coordinate those with other materials, craftsmen and suppliers as necessary. In essence, the factory becomes your personal assistant.

Tracking **Milestones** (look for this marker) is the key and simplifies the decision process. Some Milestones are simple: What color stone do you want? Others involve a lot more detail to complete. The data collected is the minimum, we provide the details. What stone do you want where? All the crafts interface in one way or another. Who needs what? Simple questions, but all are critical to the process. We develop the specification. We take care of all the details.

By using simplified reports, requests for information, and drawings, the factory can identify the right questions and get the right answers in a timely manner. Furthermore, by knowing up front which party has the right information, your burden is decreased. We know where to go to get what we need.

Staying on the same page gives you a better sense of control of the project. We know where to focus next, while communicating what has been gathered to date. Because the information is worthless unless it is shared with all parties.

Set the Plan in Stone

Events Legend

Table of Contents

Chapters

Look for this symbol: (?)

It identifies specific tasks to be completed. Timely response is essential to keep your project on schedule.

I have the check book, so what do you do?

Get to know the team!

We Capture Project Management Records

1 Delegating Project Contact Authorities

Determining the primary decision maker, our boss, or appointed authority recognized as the final word; the “Boss”.

Content: Primary Agent Log, Contact List, Contact Add Form, Tutorial

2 Project Management Records

Capturing pertinent information early on, so that we can better communicate with the people you entrusted with the success of your project.

Content: Project Records Request Form (2 pages), Tutorial

Here are my plans. Where do we go from here?

We start with your plans, setting the stage for later. working from the general issues to the specific.

Capture Project Construction Requirements

3 Customer Plan Pages (CPP’s)

Customer Plan Pages or CPPs are scans of selected sheets from customer-supplied plans. Later in step 6, they are copied for specific areas called Proposal Plan Placements (PPP). These are marked with annotations, units and notes. The CPPs are re-purposed later in the process as a guide to the bid and even later to the submittal, shop and assembly drawings.

Content: Tutorial, Area List

4 Define Colors

Deciding the stone colors for the project as a whole, entire **Areas**, or specific **Units**, the logical masonry assemblies.

5 Define Profiles

Deciding the profile shapes for the project, either by **Areas** or by individual **Units**.

Content: Master Profile List, Profile & Profile Interface Tutorial

Where should we focus first?

We’ll show you what goes where; the best ways to think about priorities.

Apply Information to the Project

6 Proposal Plan Placements (PPPs)

CPPs (above) now become Proposal Plan Placements (PPPs). Similar products will be grouped together in easily recognizable groupings, or **Areas**. **Area** by **Area**, they are used to locate and account for **Units** visually. Each **Area** is a **Milestone** to be completed. A simple plan may have only 3 or 4 **Areas**. Complex plans may have as many as needed to make tracking easy.

Content: Area PPPs, Unit Check List, Unit RFI, Tutorial

7 Estimated Schedule & Priorities

Getting all the needed information on time or in time will go a long way toward meeting predictions. Matching factory resource availability with the preferred dates is no small task. Tracking the decisions and related supplier’s information is essential. Make a plan work, work the plan. Plan the order of deliver then block out predictable production time.

Content: Estimate Schedules

Can you show me the money?

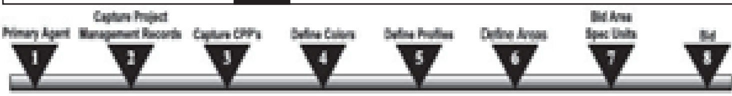
“Accountability” Giving you what you paid for!

Associating the Budget

8 Bid

Associating the money to the delivered **Units** grouped by **Area** and publishing a line item quote. Budgeting each area is a very useful tool for money management. And ensures that all of the plans were included in the bid.

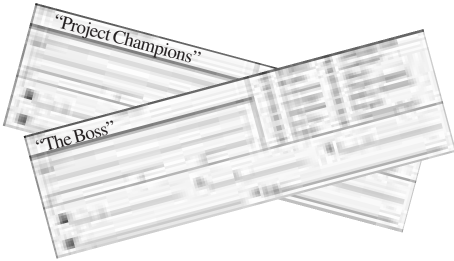
Content: Bid, Tutorial



"Who is going to keep up with all this... Making sure it all fits together?"

We Capture Project Management Records

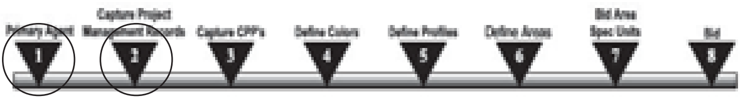
Identifying Issues for Early Intervention



Actually, it is a collaborative effort. In the end, we are all people working with people. Who is responsible for what?

Keeping people on all sides informed with what is needed, as needed, maximizes time spent, and adds value.

It is Cast In Stone!

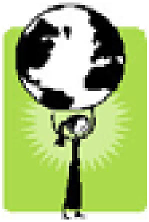


Look for this symbol

(?)

It identifies project request for information. These tasks need to be completed. Timely response is essential to keep your project on schedule.

"So, who is holding all this together?"



Objective 1

From the first signature, direct site authority can be delegated.

Objective 2

Know the key players on the team: all of the Project Champions.

Objective 3

Our job, manage the communications of project contacts we meet along the way.

We Capture Project Management Records

Milestone 1: Delegating Project Authorities

Primary Agent Log

Published report of the primary agent and any delegated authorizations.

Project Champion List

Published report of agents, their contact information, and their project associations. Factory personnel are assigned to your project with specific duties.

Contact Add Form

Request for information for adding new contacts not listed in the Contact List report. We would like to include all people involved with the project. To better serve you, we start gathering all the contacts and information long before the project bid process.

Tutorial: Contacts

What are agents?

The people the factory answers to.

Primary Agent Log (Milestone)

This is the primary contact, authorized to delegate responsibility for the project.

Project Champions (Milestone)

Contacts associated with the project that have been contracted for a service or supply.

Project Associates & Contacts (Milestone)

A list of contacts associated with the project and included in the project contacts.

Task Sheet
(Tear or Fold Here When Complete)

Primary Agent Log

Chain of Command

Primary Agent:
Has delegation authority and
____
the final say in all matters pertaining to the project.

Tasking Required?

Y ☐ N ☐ **Delegation Log:**

From:	**To:**
Authority Limits:	

Y ☐ N ☐ **Delegation Log:**

From:	**To:**
Authority Limits:	

Y ☐ N ☐ **Delegation Log:**

From:	**To:**
Authority Limits:	

Please copy form if additional delegations are required.

Task Sheet
(Tear or Fold Here When Complete)

Project Champions List

Y	N		
☐	☐	End User:	(?)________________________
☐	☐	Architect:	(?)________________________
☐	☐	Designer:	(?)________________________
☐	☐	Contractor / Builder:	(?)________________________
☐	☐	Contracting Party	(?)________________________
☐	☐	Engineer	(?)________________________
☐	☐	Steel Fabricator	(?)________________________
☐	☐	Framer:	(?)________________________
☐	☐	Mason:	(?)________________________
☐	☐	Window Supplier:	(?)________________________
☐	☐	Door Supplier:	(?)________________________
☐	☐	Other Related Supplier:	(?)________________________
☐	☐	Other Related Supplier:	(?)________________________
☐	☐	Other Related Supplier:	(?)________________________
☐	☐	Interior Decorator:	(?)________________________
☐	☐	Landscape Arch:	(?)________________________
☐	☐	Landscape Contr:	(?)________________________

Factory Staff Assignments

☐	☐	Sales:	(?)________________________
☐	☐	Field Rep:	(?)________________________
☐	☐	Estimator	(?)________________________
☐	☐	Project Manager:	(?)________________________
☐	☐	Job Manager:	(?)________________________
☐	☐	Administrator:	(?)________________________
☐	☐	Dispatcher:	(?)________________________
☐	☐	Other:	(?)________________________

Task Sheet
(Tear or Fold Here When Complete)

Contact Add Form

New Contact

Last Name: **First Name:**

Address: ____

____

City: ______________________ **ST:** ____ **Zip:** ____________

☎ ( ) - ______

( ) - ______

( ) - ______

______________________________ http:// ______________________________

Occupation:

- ❑ Architect
- ❑ Builder
- ❑ Contractor
- ❑ Developer
- ❑ Distributor
- ❑ End User
- ❑ Framer
- ❑ Other:
- ❑ Landscape Arch
- ❑ Landscaper
- ❑ Mason
- ❑ Window Supplier
- ❑ Interior Decorator
- ❑ Designer
- ❑ Contracting Party

New Contact

Last Name: **First Name:**

Address: ____

____

City: ______________________ **ST:** ____ **Zip:** ____________

☎ ( ) - ______

( ) - ______

( ) - ______

______________________________ http:// ______________________________

Occupation:

- ❑ Architect
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- ❑ Designer
- ❑ Contracting Party

New Contact

Last Name: **First Name:**

Address: ____

____

City: ______________________ **ST:** ____ **Zip:** ____________

☎ ( ) - ______

( ) - ______

( ) - ______

______________________________ http:// ______________________________

Occupation:

- ❑ Architect
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- ❑ Distributor
- ❑ End User
- ❑ Framer
- ❑ Other:
- ❑ Landscape Arch
- ❑ Landscaper
- ❑ Mason
- ❑ Window Supplier
- ❑ Interior Decorator
- ❑ Designer
- ❑ Contracting Party

Please copy form if additional contact additions are required.

Agents

A project "Agent" has some level of decision-making authority for the project.

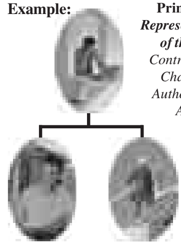
Primary Agent

The primary agent should be the primary contact person with full decision authority. In most cases, this agent is the person that signed the contract and has full financial and design authority over the project and any change orders that may be required.

Secondary Agents

In many cases, the secondary agents have no financial authority over the project or any change orders, however, they may have design decision authority based on the Primary Agent's distribution of authority.

Example:



Primary Agent
Represents the owner of the contract
Contracting Party, Change Order Authority, Design Authority

Secondary Agent
Architect
Design Authority

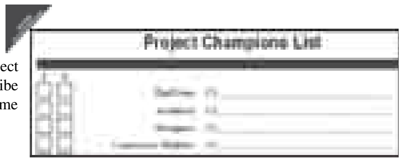
Secondary Agent
Builder or Mason
Installation Authority

Primary Agent Log

The Primary Agent delegates "Authority Limits" to secondary agents responsible for their areas of expertise.

Project Champions

Project Associations tell us who is responsible for which aspect of the project. For example, if information is needed to describe how the stone will interact with the framing of the project, time can be saved by directly contacting the Framer.



Above, Project Champions List. This is a list of skills. The gatekeepers of certain information assigned according to their respective talent.

Contacts

The Contact Add form allows you to add additional contacts that will be involved with the project. The more information we have, the better the chance we have of getting the project completed on time and in budget.

We Capture Project Management Records

Milestone 2: Capture Project Management Records

We need all the information in order to better serve you. General information spread across the scope of the project or specific issues that need attention early are also noted.

"What information do you need from me?"

The more pertinent information that we can retrieve early in the project the better we can be proactive. Remember, these are only the minimum required.

Project Records Request Form - Page 1

A request for information form for retrieving basic information regarding your project.

Stone Samples

Please verify that you received the color samples sent.

Mortar Joints

Please provide the standard mortar joint thickness desired.

Project Plans

Please verify that we have received all updated project plans?

Special Needs

Please indicate any special hardware or inserts.

Special Requirements

Please indicate any special plan details or installation needs.

Project Records Request Form - Page 2

Continuation of basic information retrieval.

Project Delivery Order

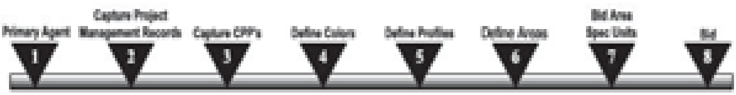
Please indicate any stone deliver priorities.

Project Delivery Instructions

Please provide any information pertaining to the delivery.

Tutorial

Project Request Forms



Task Sheet
(Tear or Fold Here When Complete)

Project Records Request Form - Page 1

Stone Samples

Have you received the stone samples we sent recently?

- ❑ **YES**
- ❑ **NO**

Mortar Joints

Interior Stonework
- ❑ **1/4" Standard**
- ❑ 3/8"
- ❑ Other

Exterior Stonework
- ❑ 1/4"
- ❑ **3/8" Standard**
- ❑ Other

Project Plans

Drawings Received		Have any drawings been updated or omitted?
❑	Architectural Plans	❑
❑	Elevations	❑
❑	Cross Sections / Details	❑
❑	Structural Plans	❑
❑	Landscape Plans	❑
❑	Opening Schedule - Windows	❑
❑	Opening Schedule - Doors	❑
❑	Other Plans / Drawings	❑

Special Needs

Are there any special needs?

- ❑ Structural Steel
- ❑ Rebar
- ❑ Attachments
- ❑ Lifting Lugs
- ❑ Threaded Inserts
- ❑ Others

____

____

Special Requirments

Please describe any special requirements:

____
____
____
____
____
____
____
____
____
____
____
____
____
____
____
____
____
____

Use the box (right) to graphically describe your needs.

Sketch Area

Task Sheet
(Tear or Fold Here When Complete)

Project Records Request Form - Page 2

Product Delivery Order

AREA	UNIT DESCRIPTION	REQUESTED DELIVERY DATE

Please copy form if additional contact additions are required.

Project Delivery Instructions

Please describe any special delivery instructions:

Examples: After 3pm. No trucks on new driveway.

____
____
____
____
____
____
____
____
____
____
____
____

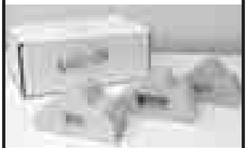
Use the box (right) to graphically detail any special directions.

Map Sketch

Project Request Form

The next RFI forms help the customer to communicate basic information pertinant to the project.

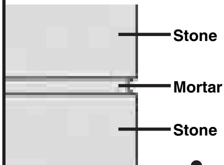
Stone Colors



TAN - WHITE - BUFF

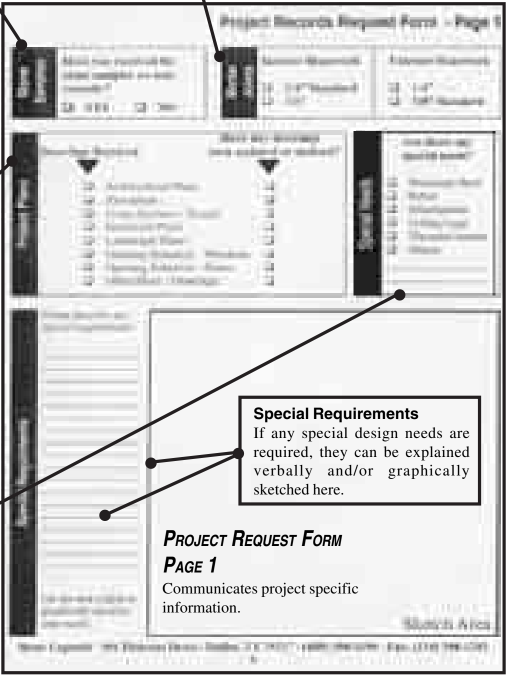
You will receive a box of samples containing the three standard colors of cast stone we offer. Standard colors are with a smooth finish. Other colors and finishes are available at additional cost.

Mortar Joints



Depending on the installation and the environment, you have options for mortar joints during installation. Designs and drawings will reflect the selected option.

For exterior applications, a thicker joint provides stability. For interior, the smaller joints are aesthetically pleasing.



Project Plans

Drawings may have been sent to Stone Legends during initial contact.

The received column indicates what drawings Stone Legends has received from the customer.

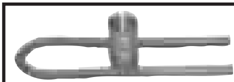
If drawings have been updated, added to, or omitted since the initial contact, place a check in the column to indicate the type of drawings that need to be re-sent to Stone Legends.

Special Requirements

If any special design needs are required, they can be explained verbally and/or graphically sketched here.

Project Request Form Page 1

Communicates project specific information.



Special Needs

Some installations require special attachments imbedded into the stone for support or additional strength.

Product Delivery Order

This is the customer's chance to indicate what stone units are most important to be delivered first.

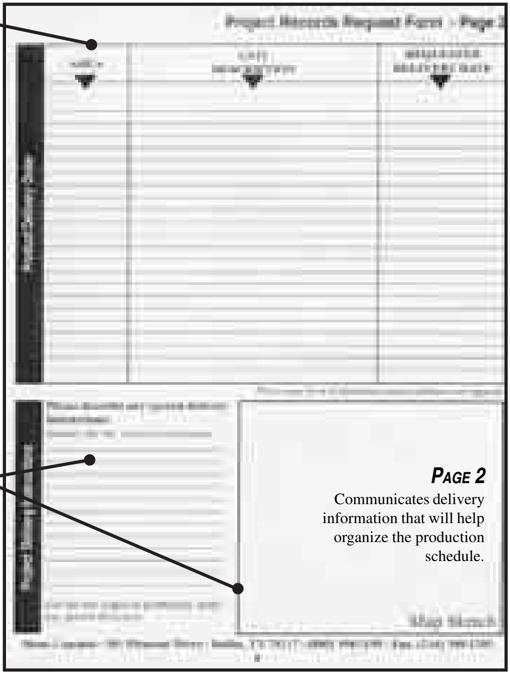
For example, it is often important to get watertable and in-line sills delivered first due to the order of brick masonry installation. The remainder of the surrounds can be delivered later.

Project Delivery Instructions

This gives the client the opportunity to give any special instructions on how the actual delivery should be handled.

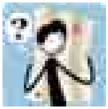
For example, depending on the type of driveway installation, large trucks may be required to take an alternate route so as not to damage the driveway.

The sketch area allows drawing out a map of any locations not easily explained verbally, such as rural routes.



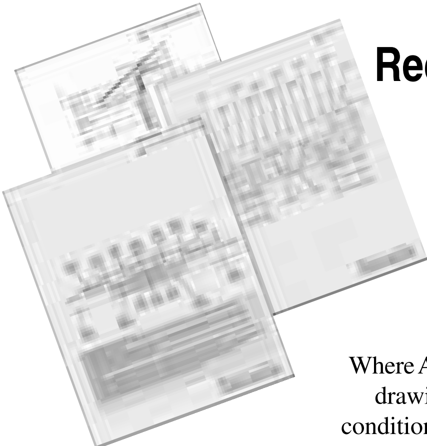
Page 2

Communicates delivery information that will help organize the production schedule.



*“This is overwhelming.
How can we be certain that
the stone fits?”*

We frame the simple questions (?) by which all the details can be derived.



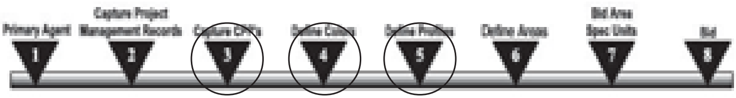
We Capture Project Construction Requirements Early

Prior Planning Prevents
Poor Performance

The Language of Stone.

Where Area defines both verbally and with drawings. Areas group decisions and conditions allowing us ti see and manange a lot of little issues one at at time. Plan track each area has specific units, the logical masonry assembly.

**It is
Set In Stone!**



"I know where I expect to see stone, where do you see it? I want to be on the same page."

Get on the same page... One last time.
During the bid process, sometimes the project goes through changes. Be certain we all start on the same page, so we know where we are all going.

Be certain we hav ethe latest version of your plans.

We Capture Project Construction Requirements at Every Phase of the Project

Milestone 3: Customer Plan Pages (CPP's)

We choose plan pages that help describe what we are doing. By capturing scans of your plans (call CPP's), we can later in the process use them to manage the proposal and organize the shop drawings.

It is your plan. Now we are going to add tihe details that make it set in stone.

CPP's - Customer Plan Pages

The capturing of customer plans for future use. the scanned images are referenced with your sheet number. Shown here are the reduced scan images.

Tutorial

Some points to consider.

Milestone 3:
Capturing CPP's
Customer Plan Pages

The capturing of Customer Plan Pages, or CPP's, is an internal factory milestone. At this point, we will convert your project plans to a digital format and begin locating and marking the Areas and the Units that will be used in the bid, project plans, shop and assembly drawings.

Customer Plan Sheets

Customer plan sheets are the actual hard copy project plans. Theses sheets will be scanned and input into our system. We maintain a hard copy for reference. Be certain we have the latest plan when we start.

CPP

Once scanned, the digital format is considered a CPP, or Customer Plan Page. We will use the digital versions of your plans in order to better communicate the information associated with the bid. These CPPs are the basis for the Proposal Plan Pages explained in Milestone 7.

"I received color samples. When do I tell you which stone color I choose?"

You will verify the selected color later in the project, however, communicating your choice early in the project helps coordinate the job efficiently.

A major milestone, color must be selected prior to releasing production.
Take your time, but be ready when the time comes. The decision will effect delivery if not made in time.

Milestone 4: Define Colors

At some point, a decision on stone color will be required. The CPPs will help relate color information to the project. Stone cannot be made without a color specification.

Insertion: Color Request Form

Area Color Selections

In most cases, one color will be used for the entire project. But occasionally a different color will be used in a specific area, for example: pool areas sometimes use a different color stone for accents.

Individual Unit Color Selections

Different project situations may lead to a decision to use a different color for one unit. For example, you might choose to produce the fireplace in a different color to better match the interior design.

Task Sheet
(Tear or Fold Here When Complete)

Color Request Form

Project Stone Color	Choose Color ❑ Tan ❑ White ❑ Buff	Notes:

Area: <Area 1>

Area Color	Choose Color ❑ Tan ❑ White ❑ Buff	Notes:

Area: <Area 2>

Area Color	Choose Color ❑ Tan ❑ White ❑ Buff	Notes:

Area: <Area 3>

Area Color	Choose Color ❑ Tan ❑ White ❑ Buff	Notes:

Area: <Area 4>

Area Color	Choose Color ❑ Tan ❑ White ❑ Buff	Notes:

"What is a Profile?"

Every part of every Unit has a basic shape if viewed from the side. This shape is called a profile, just like the profile of your face.

Generally, a profile theme is reflected throughout a project.

Milestone 5: Define Profiles

Profile shapes are vital to the project. They are the DNA for building with stone.

Insertion: Master Profile List

Obtain Job Profile List

This is a list of all profiles used in the project.

Display All Profile Drawings

Graphic versions of each profile will be published.

Obtain Unit Profile List for Individual Units

Units may have common profile shapes, but may also have other shapes that add distinction to the unit itself and apply to one or a few of the unts.

Link Profile-Interface Drawings to Areas

Interface drawings show how the profile shapes will fit together.

Insertion: Tutorial

CPP's - Profiles

Profiles are the building blocks, or DNA, of designing with stone. This tutorial will discuss some of your many options.

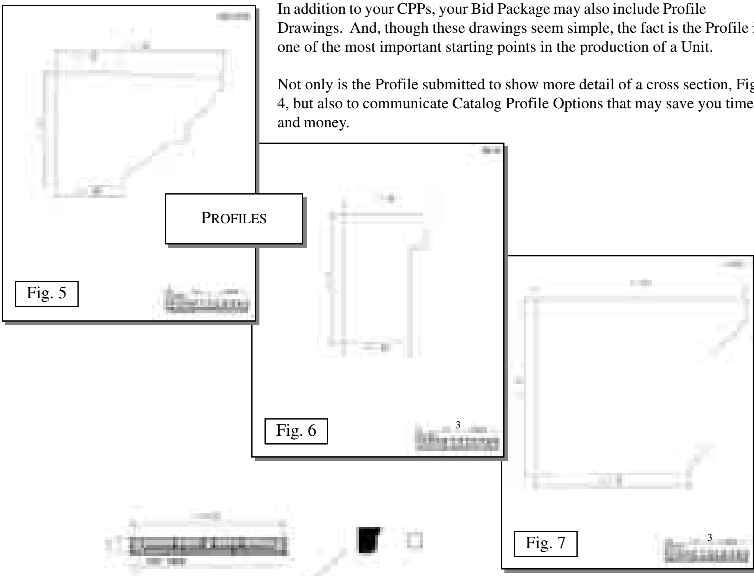
Task Sheet
(Tear or Fold Here When Complete)

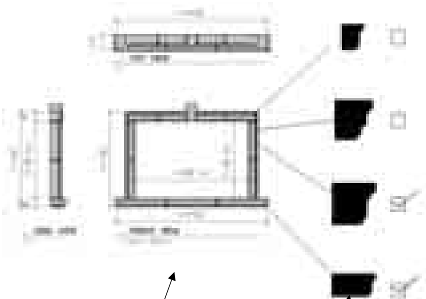
INSERT MASTER PROFILE LIST HERE

Profiles

In addition to your CPPs, your Bid Package may also include Profile Drawings. And, though these drawings seem simple, the fact is the Profile is one of the most important starting points in the production of a Unit.

Not only is the Profile submitted to show more detail of a cross section, Fig. 4, but also to communicate Catalog Profile Options that may save you time and money.





The selected Profiles will be identified by a check mark in a box next to the profile name on the Profile list. Please verify what your preferred profiles for the Project, Area or Unit are by making clear Black ink check marks in the [Customer Profile selection boxes] Also remember to cancel incorrectly identified Profiles by crossing their check marks out.

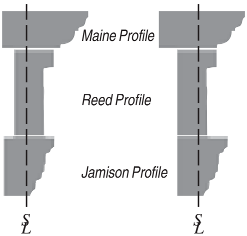
Unit Drawings not shown in this chapter

All Profiles are listed for the
- ***Project***
- ***Areas***
- ***and Units***

Catalog profile drawings also shown for reference

SL - SETTING LINE

When designing with profile extrusions, the alignment of Parts during installation can dramatically effect the final style of the Unit.
A Setting Line (SL) is used to identify a specific point in which to control the installation of the Parts. Depending on the installation of the Parts, the Setting Line can be based on several controlling factors, for example: face of wall, drips, and controlling Profile shapes.



The Setting Line (SL) gives a controlling point in which to align Profile shapes. Note that the back of the shapes do not need to align.

The Setting Line (SL) on this Profile shape, left, is set to create a natural drip for waterproofing concerns for brick or stucco installations.

Example: Entry

This example, left and below, shows how stacking profile shapes creat unlimited possibilities in design and style.

Enlargement

Inside Cope Connection.

Connection - Horizontal

In both Turns and Copes, the connection is included in the tooling that is required to make the part.

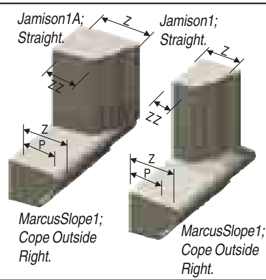
This connection simplifies the assembly of the Unit as the installer will not need to field cut mitered joints.

Mitered Corner Connection.

Connection - Vertical

Dimensions of profiles become critical, particularly when connecting different Profile Extrusions to make complex units.

The example, right, shows how two very similar Profile Extrusions can interact differently with a second Profile Extrusion. In this situation, the Jamison1 Profile's depth (Z) is better suited to work with the MarcusSlope1 Profile's setting bed (P). Without adjustment, the Jamison1A would extend past the MarcusSlope1 Profiles depth (Z).



"Fitting everybody together, can you make me feel secure that everything is covered?"

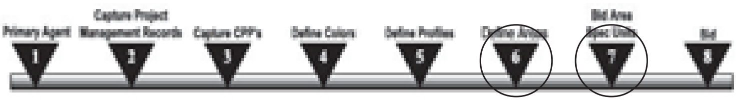
We know how overwhelming information can be. We will break down the plans into smaller recognizable areas.

We Apply the Information to your Project

Its a Big Job or
Just a Bunch of Little Ones

First, it is all about asking the right questions. Second, it is about questioning the right person.

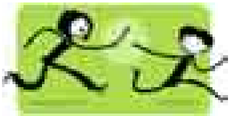
It is
Cast In Stone!



Milestone 6: Proposal Plan Placements (PPP’s)

At this point, the CPPs become Proposed Plan Placements and relate directly to the bid. They link the specified units to the Areas marked on the PPP’s.

“How will we communicate the unit information?”



We will publish easy to understand graphic documents that outline your entire project.

Insertion: PPP’s - Proposal Plan Placements

Publish Checker Numbers

We will publish area sheets with checker #’s for your review. Checker numbers are a count of the Units specified in a specific area.

Publish Spec Drawings

We will publish all specification unit drawings.

Publish RFI (Request for Information)

We will publish RFI drawings on custom units.

Publish Installation Drawings

We will publish helpful interface, attachment, cutting and flashing drawings in order to better educate you on using our stone products.

Insertion: Area Unit List

All units are listed by area on letter sized sheets.

Insertion: Tutorial

Areas

An Area is a logical segment of a plan that allows us to break large plans up into smaller, more easily manageable portions.

Insertion: Tutorial

Proposal Plan Pages (PPPs)

These are the annotated CPPs that are clearly marked with the Area, Unit and Quantity of each unit required.

INSERT PPPs AND OTHER DRAWINGS HERE

INSERT PROJECT AREA LISTS HERE

Typical Areas
Below is a listing of typical area names. However, an Area can be named anything that is logical and consistent with the customer's plans. Each Project will have its own specific Areas. And each Area is a separate Milestone. This allows for easier tracking and follow-up.

AREA ABBREVIATION LEGEND
BY PRODUCT GROUP

Abl	Address Blocks	**Nch**	Niches
Blt	Balustrade	**Orn**	Ornaments
Bnt	Benches & Tables	**Pnl**	Panels
Cch	Caps for Brick Chimneys	**Pvr**	Pavers
Clw	Caps for Landscape Walls	**Plt**	Planters
Clp	Caps for Landscape Piers	**Plc**	Plinths & Corner Blocks
Clm	Columns	**Pcp**	Pool Coping
Cre	Cornices & Entablatures	**Qns**	Quoins
Ent	Entries	**Sgn**	Signage
Ext	Extrusions	**Sll**	Sills
Fns	Finials & Spheres	**Stt**	Statuary
Frp	Fireplaces	**Stp**	Steps
Fnt	Fountains	**Swd**	Surrounds – Windows & Doors
Gzb	Gazebos	**Vnt**	Vent
Kys	Keystones	**Wca**	Wall Coping & Accents
Lnj	Lintels & Jack Arches	**Wtb**	Watertable
Mbx	Mailboxes		

AREA ABBREVIATION LEGEND
BY PLAN GROUPINGS

Cbn	Cabana
Elv	Elevation
Ele	Elevation - East
Eln	Elevation - North
Els	Elevation - South
Elw	Elevation - West
Grg	Garage
Gst	Guest House
Gdg	Garden & Grounds
Gth	Gate House
Gts	Gates
Mnt	Monuments
Mtc	Motor Court
Pla	Pool Area

Proposal Plan Pages (PPPs)

PPPs are scans of customer plans that have been marked up to align with the bid. We start with a direct scan of the Customer Plans (CPPs). PPPs are the next step. The final step will be Submittal Drawings for final approval once the Project has become a job.

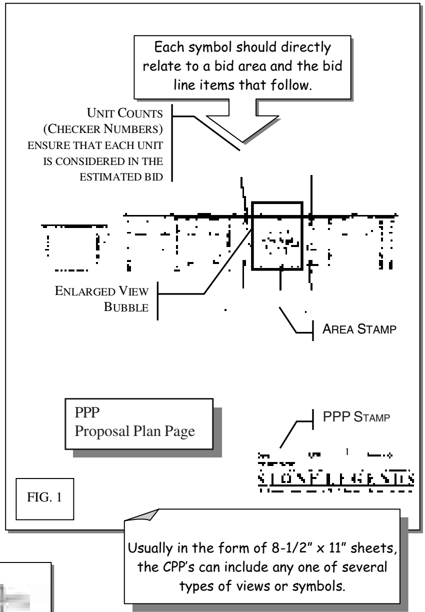
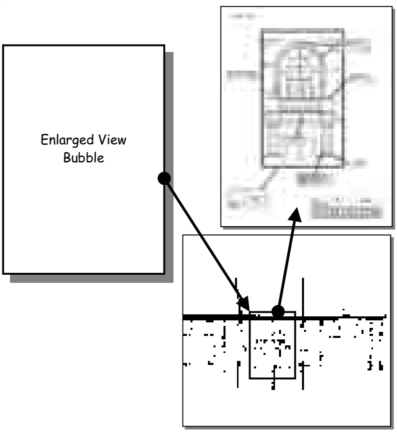


FIG. 1

PPP - PROPOSAL PLAN PAGE

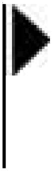
Each symbol will relate to a bid area and the bid line items that follow. Usually in the form of 8-1/2" x 11" sheets, the PPPs can include any one of several types of views or symbols.



PPP - Enlarged View

The Enlarged View is used to convey more information regarding a specific Product Group Area.

It is sometimes important to add more detail to certain areas of the customer plans. Once enlarged, notes and symbols can be added to call out details that might otherwise be missed.



Cross Section / Interface

A cross section is defined as a plane cutting through an object, or a cut away view showing the inner workings of an object.

So, a Section Cut symbol (left) indicates a secondary PPP that shows even more information.

The Enlarged View Bubble can call out even more information.

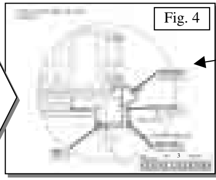


Fig. 4

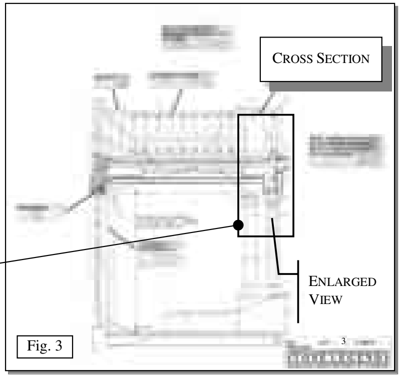
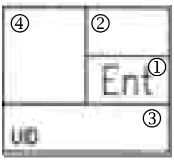


Fig. 3

AREA STAMP



The Area Stamp is used to identify Product Group Areas within a PPP. It allows visual verification of estimated Units and Quantities. The Area Stamp maps out a path between the PPPs and the Estimated Bid for you to follow.

1) **Area Abbreviation** – The identifier for a grouping of similar products.

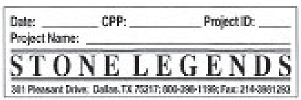
2) **Checker Number** – To be added later, the Checker Number is a consecutive count and numbering of the Units within a specified Area.

3) **UID** – Unit Identification – A unique ID of an existing Unit that has already been cataloged. For Internal Company Use.

4) **Unit Mark** – May or May not be used in the Estimated Bid Phase, the Unit Mark adds an Alphabetic Unit Mark to each Unit.

PPP Stamp

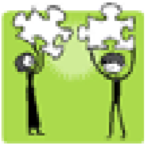
The PPP (Proposal Plan Page) Stamp refers to the plans that you have sent. The number will be the same as the drawing number from your plans. The Project ID is our numerical count of your project.



Notation Stamp

Used to clarify product locations, to convey concerns or options related to the PPPs and the Bid.

"Will I know when to expect the information and products?"



We will publish and estimated schedule of events in order to keep everyone on the same page.

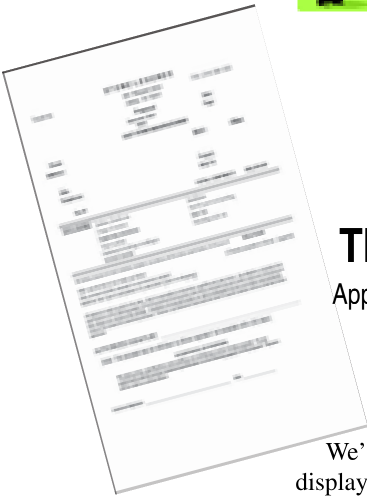
Milestone 7: Estimate Schedule & Priorities

We will estimate the schedule and critical milestones for you in order to keep everyone on the same page.

Insertion: Estimated Schedule

INSERT SCHEDULE HERE

"I've seen the drawings. Now, how much will the project cost?"



The Estimate / Bid

Applying the Budget to the Project

We've published your drawings and displayed graphically all the units on your project.

Now we will show you how the information will apply to your budget.

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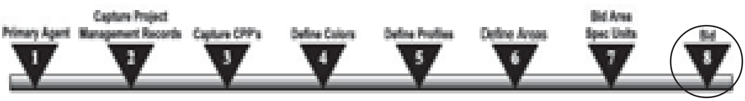
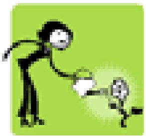


"Where does the money come into play?"



We will publish the final bid for your review and authorization.

Milestone 8: Bid

Final bid published for your review.

Insertion: Bid

We will publish the bid report that this field notebook was based upon.

Insertion: Tutorials

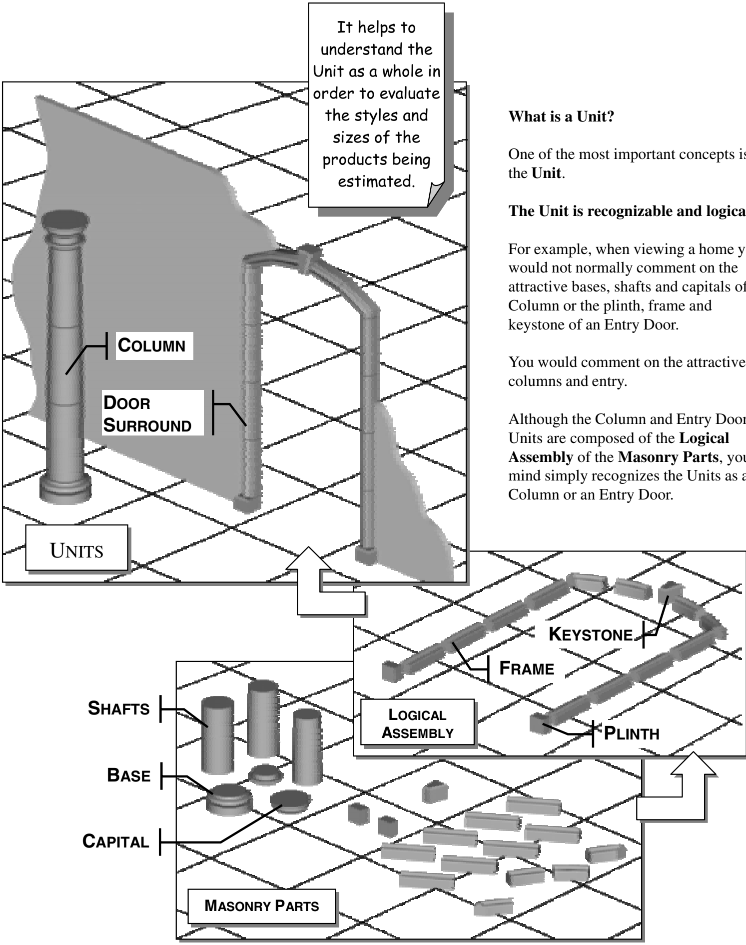
The Unit

Recognizable and logical assembly.

The Bid

Let us break down each part of the bid for you.

INSERT
BID
HERE



What is a Unit?

One of the most important concepts is the **Unit**.

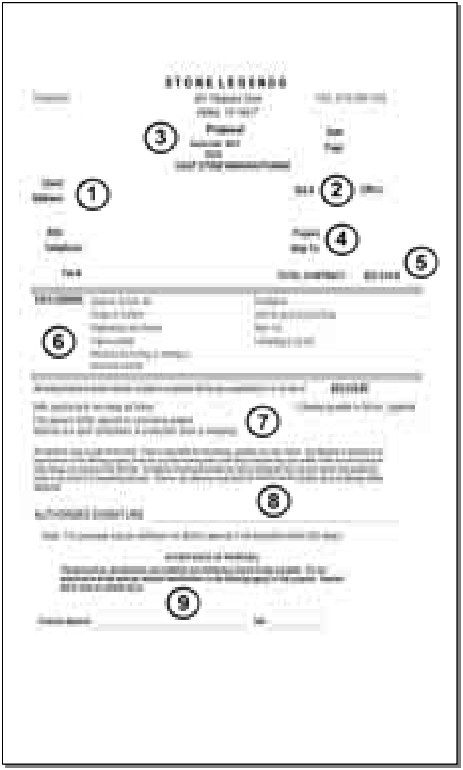
The Unit is recognizable and logical.

For example, when viewing a home you would not normally comment on the attractive bases, shafts and capitals of a Column or the plinth, frame and keystone of an Entry Door.

You would comment on the attractive columns and entry.

Although the Column and Entry Door Units are composed of the **Logical Assembly** of the **Masonry Parts**, your mind simply recognizes the Units as a Column or an Entry Door.

Cover Sheet



1) **Client Information**
It is important to verify all information and contact numbers. Correct them as needed.

2) **Bid #**
Current Bid Number being submitted for approval.

3) **Supercede Notification**
Indicates a previously submitted Estimated Bid by Bid Number and Bid Date and gives you a new number and new date.

4) **Project Name / Shipping** Indicates the actual Stone Legend Project Name and the Shipping Address of the project (Verify ZIP).

5) **Total Contract**
Please verify total contract amount, it includes all noted quantities and delivery.

6) **Exclusions**
Exclusion of services not provided, so as to prevent misunderstandings and alert you to additional costs associated with installation.

7) **Payment Options**
Total contract amount and noted terms of payment offered. These terms are determined by the size of the project. If more than one delivery is required, you only pay the balance of the sum delivered per truckload.

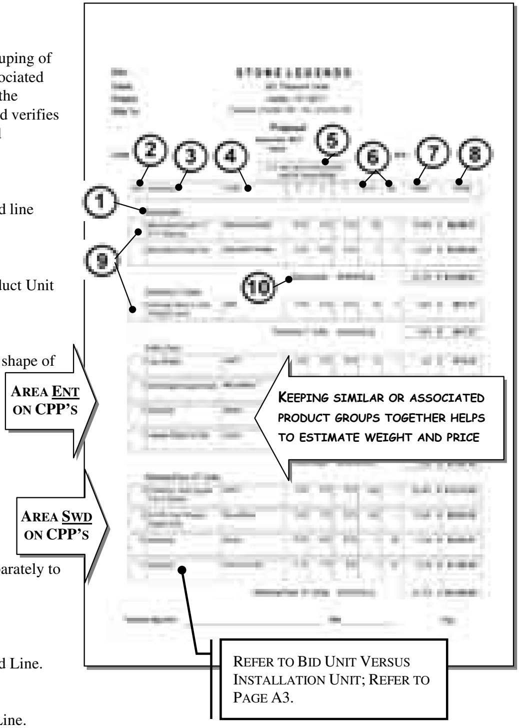
8) **Authorized Signature**
The signature of the authorized Stone Legends estimator extending the bid offer.

9) **Acceptance of Proposal**
Unless otherwise noted, this signature will be the only one allowed approving submitted documents or drawings. If an agent is appointed on your behalf, it will be by written orders only.

It is Cast In Stone!

Bid Line Items

The breakdown of bid line items might seem a bit complicated at first, but you will find that it is the most important part of the Bid. This is the section where products are broken down into specific Product Groups.



1) **Product Group / Area**
   The logical and recognizable grouping of products. Keeping similar or associated product groups together helps in the estimating of weight and price and verifies that we have counted all intended installations.

2) **Item Number**
   The consecutive numbering of bid line items.

3) **Description**
   The bid line description of a product Unit or a Unit's Parts estimated.

4) **Profile**
   The name of the unit or extruded shape of the stone.

5) **X, Z, Y**
   The basic dimensions of the Unit each or the extruded Profile linear footage.

6) **Lin. Ft. or Qty**
   Depending on how the Bid Line Item is being estimated, the two fields can be used together or separately to show the amount of stone being estimated.

7) **Weight**
   Total weight of stone per Unit Bid Line.

8) **Total**
   Total cost of stone per Unit Bid Line.

9) **Unit Bid Line**
   Actual Unit or Unit parts being bid.

10) **Product Group Referenced to Plan in a Sub Total**
   Total weight and cost of the group of similar units.

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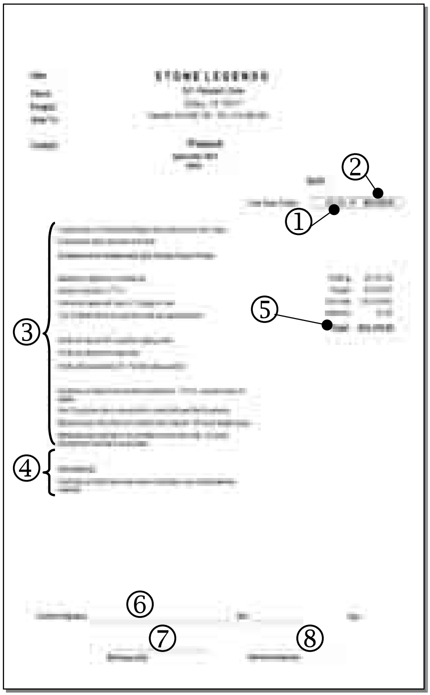
Special Notes & Totals



1) **Line Item Totals**
   Total estimated weight. Includes all Product Group Areas.

2) **Line Item Totals**
   Total estimated cost of all Product Groups, material costs only.

3) **Special Notes**
   Estimator notes help clarify different types of conditions and proposed options. These notes may also appear on PPP's (Refer to your PPP's for project specific note references).

   The note section is another prime point of communication between the estimator and the client. Ask your estimator to clarify any information. That's what their there for.

4) **Recommendations**
   Another point of communication between the estimator and the client, this section allows the estimator to recommend or additional product options or alternate applications. Your estimator is trained to help guide you to details that might enhance the overall aesthetics of your project.

5) **Total**
   Estimated total project cost, including additional charges, such as drafting fees, freight, custom charges, etc. This is the bottom line you saw on Page 1 of the proposal.

6) **Customer Signature**
   Customer approval signature required. Please verify all information prior to signing.

7) **Bid Signatures**
   Indicates the estimator's who prepared the bid.

8) **Authorized Signature**
   Stone Legends agrees to allocate the time needed in our factory to produce the project.

It is
Cast In Stone!