

FMPilot2 Quote Processing – Best Practices Guide

Overview: The FMPilot2 Quote Processing Best Practices Guide is a comprehensive resource designed to support external business partners in efficiently processing quotes within FMPilot2. This guide provides essential information and best practices to ensure that quotes are thoroughly prepared and complete, thereby minimizing the risk of rejections. Each section of the guide offers detailed guidance on key topics, including:

Section Index:

1. Description of work performed text box requirements
2. Charge Type entries
3. Standard tool and Job-related usage fee examples
4. List of quote requirements
5. Trade team contacts & Regional map

Section one:

Description of work performed text box requirements

Please include the following information when filling in the **‘Description of work performed’** text box.

1. **Asset information:** Type, make, model, serial number, age, size, and identification tag. If new equipment is being quoted, please include the model number and specs on the latest equipment.
2. **Tech finding notes:** The tech notes should support time at the location. What did the tech find? What steps were taken to determine the conclusions? Include tech recommendations.
3. **Proposed job scope notes:** The scope should support the proposed labor hours. What steps will the tech(s) take to complete the work? Also, include information explaining why additional techs or rental equipment is required.
4. **Warranty information:** What are the parts, materials, and labor? A manufacturer's warranty is not a conclusive response. We need the manufacturer's warranty terms broken down.
5. **Lead times:** Once approved, how long will it take to source the goods and return to close the work order?

“Description of work performed” example:

Description of work performed

<p>Carrier RTU1 Mod: 50GC-M05D2A5-0A0C0 Ser# 4919C88532 Age: 2019</p> <p>INCURRED:</p> <ul style="list-style-type: none"> - During a recent service call the tech found issues with RTU# 1 due to a lack of proper power, which was caused by a wiring issue. - After replacing the wire connector and damaged wiring, the tech found the compressor is malfunctioning, causing it to over-amp and shut off, resulting in a tripped breaker and overheated wires. (A burnt internal component has been identified as the cause of the issue.) - The tech recommends returning to replace the compressor, filter drier, and recharge the system. <p>PROPOSAL:</p> <ul style="list-style-type: none"> -Cut power to unit and lock-out breakers. -Reclaim existing refrigerant. -Remove and replace the compressor and liquid line drier. -Use nitrogen to check the system for a proper seal. -Pull a vacuum on the system. -Refill the unit with R410A refrigerant to equipment standards. -Remove lock-out and power up unit. -Check system for complete operations. -Remove old parts and debris from the location. <p>New parts and labor warranty: 1-year parts / 30-day labor</p> <p>Lead time: 5 days upon approval</p>
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Section two:

Charge type entries

To ensure accurate and transparent record-keeping, all labor, trip charges, materials, parts, and freight must be itemized and entered as separate lines on the entry form. As outlined below, each 'Charge' type will require multiple columns to be completed.

Note: All incurred '**Charge**' type entries must be marked incurred (Yes), and all proposed '**Charge**' type entries must be marked not incurred (No).

Labor Charge type:

1. Your standard hourly rate will automatically populate when selecting labor as the '**Charge**' type. If overtime rates apply, you must change the '**Option**' type from '**Standard**' to '**Overtime**' to get your Overtime rate to populate.
2. When labor rates do not populate, change the '**Item**' code from '**Standard**' to '**Manual**' to edit your labor rate.
3. When filling in the '**Charge**' type description, please include the number of techs and hours. If OT is applicable, please include those details.
4. Techs are not permitted to charge for driving time. If a service location falls outside of the designated service area, drivers must obtain prior approval from the account team for additional compensation. Any approved additional funds must be documented in the work order comment section.
5. If repairs can be completed in a single visit but require the tech to leave to source necessary parts or materials, one hour may be charged for local procurement and return to complete the repairs.
6. When two techs are necessary, please provide details for the additional tech. Before accepting any work orders, seek approval for the second tech from the dispatcher. It is important to note that most clients will not approve charges for additional techs unless adequately justified.

Trip Charge, Charge type:

1. Only one (1) **Trip Charge** fee is applicable per site visit. No matter how many techs or trucks are required, you can only charge one daily trip fee.
2. There is no such charge for Overtime **Trip Charge** fees.
3. Please note that additional travel fees may apply if the service location is outside our designated service area. Before accepting a work order, obtaining approval from the account team is essential. Any approved trip fees must be documented in the work order comment section.

Material and Part charge types:

1. All parts and materials must be broken down into separate '**Charge**' types, including part numbers and specs. See examples below.
2. You may enter a bulk **Material** '**Charge**' type on large-scale quotes if the materials are listed in the '**Charge**' type description box. Please note that bulk materials should be categorized based on the type of materials used. **Example: *Electrical materials: 100' of 10/2 BX wire, hangers, fittings, six 2x4 outlet boxes, six GFI outlets, and six covers. See more examples below.***
3. All parts and equipment must be on their separate '**Charge**' type. Bulk is not applicable.

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Examples of unacceptable and acceptable material/parts line item descriptions.

Unacceptable descriptions	Acceptable descriptions
Copper fittings	¾" (2) 90's, (1) T, (3) couplings
Drain line	¾" PVC (36') pipe, (4) 90's
Electrical materials	(50') #8 copper wire, (2) 30amp 240v fuses
Hardware	(6) 3/8" bolts
Thermostat	Honeywell RTH6580WF
Cleaning products	Simple Green (1) GAL (Item#)
Ballast	Optanium 120/277v 4-lamp LED (Part#)
Motor & belt	(1) OEM 6K403 3/4hp 230v, (1) 4L240 V-belt
Flush Valve	Sloan Battery powered 1.28gpf Flushometer (G28111-1.28)
Fuses	Bussman FNM-10- (3) Time delay bus fuse, 30amps, 250v, (4XC13)
Scissor lift	30' reach electric scissor lift – 5 days

Freight Charge type:

1. All shipping and freight fees must be coded as **Freight 'Charge'** type.
2. Please apply expedited shipping fees for all emergency services items impacting health, safety, and security.
3. Mobilization fees should be coded with a **Freight 'Charge'** type.

Tax Charge type:

1. **Tax 'Charge'** fees are not applicable. The cost of all purchased goods must encompass applicable taxes in the rate.
2. CBRE has a Resale Certificate for most States, which doesn't permit you to charge service taxes. However, you can charge service taxes for the following States: *Alaska, Arizona, Hawaii, Idaho, Kansas, Louisiana, Missouri, Nebraska, and South Dakota.*
3. You may enter the service tax fee under the **'UST'** line in the bottom right section on the quoting page. Do not create a Tax 'Charge' type fee.

Section three:

Standard tool and Job-related usage fee examples

The following are examples of standard tools and job-related usage fees for specific trades. Please reference this section to understand basic trades' permitted fees and price ranges.

Note: CBRE On-Demand utilizes National suppliers to validate the pricing of goods. Additionally, CBRE evaluates local, regional, and economic trends across the United States.

Tools and Equipment Rental Fees

All tool and equipment fees are vetted through United Rentals, Herc Rentals, and Sunbelt, contingent upon the service location. The rental rate for tools and equipment should encompass tax, environmental fees, transportation costs, daily/weekly rates, plus a 25% markup. If a rental tool is necessary for the job and a standard truck stock tool is not suitable, please provide a detailed justification for the rental tool's requirement.

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HVAC/Refrigeration

Material, Tool, & Service Fees	Billable	Measure	Price Ranges	Additional notes
Crane Rental: Single story – Standard reach	Yes	1-10 tons	Up to \$2000	INCL: Load, unload, & delivery
Crane Rental: Multi-story – Extended reach	Yes	>10 tons	Up to \$4500	INCL: Load, unload, & delivery
Tool and equipment rentals	Yes	Per job	NA	Region base: United Rentals + 25% mark up
Duct lifts	Yes	<700 Lbs	Up to \$900/week	
Trailer Fee (Equip install with crane)	No			Included in the Crane fee
Trailer fee (Company owned w/out crane)	Yes	Per job	Up to \$250	
Trailer rental fee (w/out crane)	Yes	Per job	NA	Herc Rentals plus 25% markup
Applicable Permits	Yes	Equip Size	\$75- \$3000	
Engineering Fees	Yes	Per job	Up to \$4500	Mostly West Coast region
PPE fees	Yes	Per person	Up to \$15	
Air Balancing fees	Yes			
Warranty processing fee	Yes	Flat fee	Up to \$150	Admin time
Disposal fees	Yes	Per job	Up to \$50	Per EPA regulations
Refrigeration Leak detector usage fee	Yes		Up to \$90	
Truck stock consumables	Yes	1/site visit	Up to \$25	MISC: Tape, wire nuts, towels, hand cleaner, etc.
Per diem (Lodging & meals)	No			Must have preapproval
Nitrogen fee	Yes	<10 tons	Up to \$50	Per unit repair
Nitrogen fee	Yes	>10 tons	Up to \$80	Per unit repair
Refrigeration recovery machine usage fee	Yes	Flat fee	Up to \$50	Per unit repair
Refrigerant disposal fee	Yes	Flat fee	Up to \$50	Per unit repair
Torch/welding usage fee	Yes	Flat fee	Up to \$175	Per unit repair
Vacuum pump usage fee	Yes	Flat fee	Up to \$40	Per unit repair
R22	Yes	Per LB	Up to \$90	
R407c	Yes	Per LB	Up to \$30	
R410a	Yes	Per LB	Up to \$55	
M099 – R438a	Yes	Per LB	Up to \$40	
R422b – NU22	Yes	Per LB	Up to \$40	
R454b	Yes	Per LB	Up to \$55	
Acid Neutralizer (Test kits)	Yes	Per kit	Up to \$120	Per unit repair
RX11 Internal system flush	Yes	Per bottle	Up to \$300	Per unit repair
Refrigeration Manifold usage fees	No			Common trade tool
Micron Gauge usage fees	No			Common trade tool
Refrigeration scale usage fees	No			Common trade tool
Wet dry vacuum usage fees	No			Common truck stock item
Impact drills	No			Common truck stock tool
Voltage meters	No			Common trade tool
Core valve removal tool	No			Common trade tool
Bifold step ladders	No			Common truck stock tool
Extension ladders	No			Common truck stock tool

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Plumbing and Fire Life Safety

Material, Tool, & Service Fees	Billable	Measure	Price Ranges	Additional notes
Small jetter usage fees	Yes	<500 gals	Up to \$300	
Large jetter usage fees	Yes	>500 gals	Up to \$500	
Impact drills	No			
Permit fees	Yes		NA	When applicable
Truck stock consumables	Yes	1/site visit	Up to \$25	MISC: Tape, wire nuts, towels, hand cleaner, etc.
Per diem (Lodging & meals)	No			Must have preapproval
Small Auger usage fees	Yes	<75 FT	Up to \$175	
Large Auger usage fees	Yes	>75 FT	Up to \$220	
Bifold step ladders	No			Common truck stock item
Extension ladders	No			Common truck stock item
Wet dry vacuum usage fees	No			Common truck stock item
Tool and equipment rentals	Yes	Per job	NA	United Rentals plus 25% markup
Excavating/Shoring rental equipment fees	Yes	Per job	NA	United Rentals plus 25% markup
Trailer fee (Company owned)	Yes	Per job	Up to \$250	Flat fee
Trailer rental fee	Yes	Per job	NA	Herc Rentals plus 25% markup
PPE fees	Yes	Per person	Up to \$15	
Disposal fees	Yes	Per job	Up to \$50	Per EPA regulations

Electrical and Signage

Material, Tool, & Service Fees	Billable	Measure	Price Ranges	Additional notes
Bucket truck fees (Company owned)	Yes	Per HR	Up to labor rate/hr	
Tool and equipment rentals	Yes	Per job		United Rentals plus 25% markup
Impact drills	No			Common truck stock tool
Voltage meters	No			Common truck stock tool
Trailer fee (Company owned)	Yes	Per job	Up to \$250	
Trailer rental fee	Yes	Per job	NA	Herc Rentals plus 25% markup
PPE fees	Yes	Per person	Up to \$15	PPE fees
Per diem (Lodging & meals)	No			Must have preapproval
Bifold step ladders	No			Common truck stock item
Extension ladders	No			Common truck stock item
Wet dry vacuum usage fees	No			Common truck stock item
Portable work & tower light rentals	Yes	Monthly		United Rentals plus 25% markup
Directional boring	Yes	Per job	Up to \$50/FT	
Thermal imaging usage fee	Yes	Per job	Up to \$85	
Permit fees	Yes		NA	When applicable
Truck stock consumables	Yes	1/site visit	Up to \$25	MISC: Tape, wire nuts, towels, hand cleaner, etc.
Disposal fees	Yes	Per job	Up to \$50	Per EPA regulations

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General Repair and Handyman

Material, Tool, & Service Fees	Billable	Measure	Price Ranges	Additional notes
Tool and equipment rentals	Yes	Per job		United Rentals plus 25% markup
Impact drills	No			Common truck stock tool
Voltage meters	No			Common truck stock tool
Trailer fee (Company owned)	Yes	Per job	Up to \$250	
Trailer rental fee	Yes	Per job	NA	Herc Rentals plus 25% markup
PPE fees	Yes	Per person	Up to \$15	PPE fees
Per diem (Lodging & meals)	No			Must have preapproval
Bifold step ladders	No			Common truck stock item
Extension ladders	No			Common truck stock item
Wet dry vacuum usage fees	No			Common truck stock item
Permit fees	Yes		NA	When applicable
Power washer usage fee (Company own)	Yes	Per job	Up to \$125	
Power washer rental	Yes	Per job		United Rentals plus 25% markup
Truck stock consumables	Yes	1/site visit	Up to \$25	MISC: Tape, wire nuts, towels, hand cleaner, etc.
Fuel for gas-powered rental equipment	Yes	Per GAL	Local market price	Plus 25% mark up
Welding usage fee (Company owned)	Yes	Per job	Up to \$175	
Disposal fees	Yes	Per job	Up to \$50	Per EPA regulations
Dumpster rentals	Yes	Per dump	Rental rate	Plus 25% mark up
Trips to the dump yard	Yes	Per trip	Market price (Qu Ft)	Plus 25% mark up
Glass lifts (Company owner)	Yes	Per job	Up to \$200	Size of glass permitting
Glass lift rentals	Yes	Per day	Up to \$500	Size of glass permitting
Excavating/Shoring rental equipment fees	Yes	Per job	NA	United Rentals plus 25% markup

Section four:

List of quote requirements

Please ensure that the following quote requirements (1-5) are included within the "*Description of Work Performed*" section of the FMPilot2 quote. If an error window indicates that the character limit of X has been exceeded, you may attach a document detailing the requirements to the work order paperclip.

1. **Asset information:** All location assets are tracked through FMPilot2 for comprehensive asset management, ensuring that repairs are accurately performed on the appropriate equipment. This system also facilitates efficient warranty opportunities, robust data collection for informed replacement proposals, and meticulous inventory tracking.
 - a. **Information to include:**
 - i. Asset ID number. (or location of the asset)
 - ii. Make/Brand
 - iii. Model and Serial number
 - iv. Age of asset
 - v. Size
2. **Tech notes from the site visit:** Providing detailed technical notes enables CBRE to comprehensively understand the steps taken by technicians to diagnose, resolve, and finalize their recommendations. This process also ensures that all incurred fees are accurately verified and approved within the system.
3. **Proposal/Recommendation notes:** When submitting recommendations, please provide comprehensive details outlining the steps and challenges involved in performing the service. If additional technicians or

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rental equipment/tools are necessary, include supporting information for these requirements. Additionally, specify any exclusions when standard services are not applicable. Providing all relevant details ensures swift approvals and minimizes client rejections for CBRE.

4. **Warranty information:** We request detailed warranty information for workmanship, parts, and services. General manufacturer warranty statements are inadequate; specific terms for each item are necessary. If a service does not include a warranty, please provide a rationale. Additionally, please be aware that CBRE adheres to a standard 30-day return policy, effective from the final site visit, as outlined in our mutual agreement (MSA).
5. **Lead times:** Please provide the expected return time details, including the availability of materials, parts, and equipment, as well as the schedule. These details will enable the client to make timely decisions when reviewing quotes for approval and determine if temporary equipment services are necessary.

The following quote requirements should be attached to the work order paperclip icon.

6. **Photos of the subject:** In our digitally-driven service environment, it is essential to receive photographs of the subject part and its surroundings to verify its location. Additionally, capturing images of the asset and part tags is crucial. This practice ensures that all quotes are reviewed and processed with maximum efficiency. All photos can be uploaded within the App or attached to the work order paperclip icon.
7. **Project drawings:** Please provide comprehensive overview drawings detailing exterior service locations. Examples of repairs include roofing, concrete, asphalt, trenching and excavating, poles, and building lighting. For concrete/asphalt sections, include the square footage and depth. For trenching/excavating, specify the path and area of excavation. For indoor renovations, provide drawings outlining the rooms involved and project details. Detailed information is always appreciated.

Section Five:

Trade Services contacts – Regional map

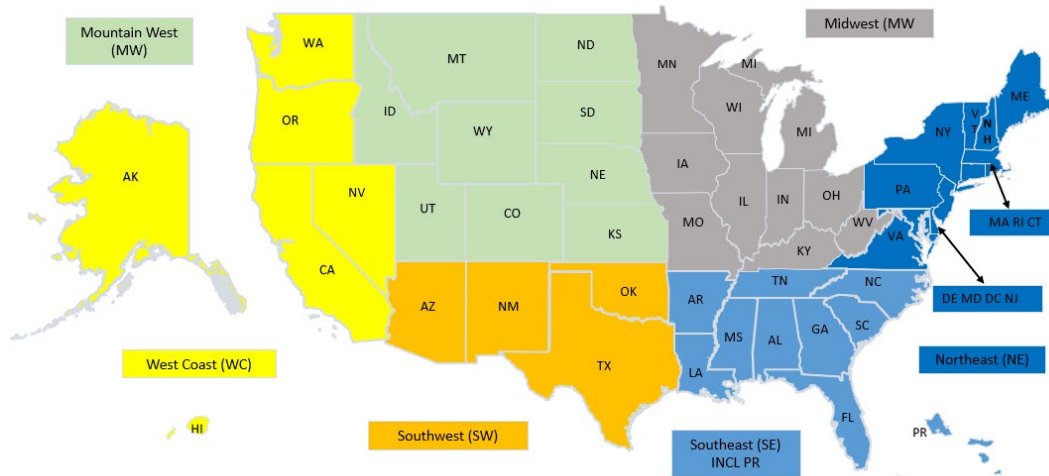
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Department Lead: Roy Chapman		Roy.chapman@cbre.com	614.681.5588
Manager: Fernando Oropeza-Quiroz		Fernando.oropezazuquiroz@cbre.com	TBD
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Plumbing, FLS, GR, Doors, Roofing, Equipment, Asphalt, & Concrete Team			
Team Leaders			
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Trade Specialist			
Name	Region	Email	Phone

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Regional Map



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