

# PSE IMS - 2nd Measure Cover Sheet - Windows



Store Number: \_\_\_\_\_

Customer Name: \_\_\_\_\_

PROvider Company Name: \_\_\_\_\_

## Required Documents for 2<sup>nd</sup> Measure

Below documents must be available to the Installer for review, prior to the 2nd measure. Failure to provide all required documents may result in delays.

**2<sup>nd</sup> Measure Cover Sheet** (this document)

### Drawing Worksheet

- Can include product selection, in-home measurements, detailed drawings, quantities, additional considerations, labor scope of work, etc.

**Installer Pricing Worksheet**

# PSE Pre-Call and In-Home Notes - Windows



This document is not required to be uploaded into IMS for PROvider and IST.  
Use this page for reference and to record assessment needs.

Store #:		PSE Name:	
Customer Name:		2 <sup>nd</sup> Customer Name:	
Customer Phone:		Customer Email:	
Installation Address:		City, State, Zip:	
Appointment Date:		Appointment Time:	

Pre-Call Checklist	Appointment Preparation
<ul style="list-style-type: none"><li>○ Introductions</li><li>○ Confirm all customer details and appointment times above</li><li>○ Verify scope of work with customer</li><li>○ Validate that the client owns the home and age of home</li><li>○ Set expectations regarding appointment length and agenda</li><li>○ NO SELLING or PRICING on the Pre-Call</li><li>○ See <a href="#">Pre-Call Cheat Sheet</a> for phrasing examples</li></ul>	<ul style="list-style-type: none"><li>○ Review lead information in LMS</li><li>○ Assemble job folder</li><li>○ Customer folder</li><li>○ Samples and brochures</li><li>○ Measuring tools</li><li>○ Booties and PPE</li><li>○ Surface</li></ul>

## Customer Needs Assessment

The following questions can be used to help guide the conversation during the In-Home, gather details around the scope of the project and offer the appropriate products/services to meet the customer's needs:

What is your <b>motivations</b> for installing new windows <b>now</b> ? And how long have you been thinking of doing this project?	
<b>Biggest concerns</b> with your current windows? What area in your home are you <b>most concerned</b> with?	
What do you <b>like</b> or <b>would change</b> about your <b>current</b> windows?	
What <b>research</b> have you done on windows thus far?	
What <b>features</b> are you looking for?	
What <b>style</b> or <b>type</b> of windows are you looking for?	
How long do you <b>plan on staying</b> here? (Cost vs. Value)	
Are there any <b>HOA</b> or <b>Historical District</b> requirements? And do they need to approve prior to installation?	
Are you planning on using your <b>Lowe's Advantage Card</b> ? (Begin discussing benefits of LAC early on and throughout appointment)	
Additional Notes:	

# PSE Drawing Worksheet - Windows



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Store #:		PSE Name:	
Customer Name:		2 <sup>nd</sup> Customer Name:	
Customer Phone:		Customer Email:	
Installation Address:		City, State, Zip:	

Age of Home:	
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Window Details and Notes:		
Brand:	Unit Type <sup>1</sup> :	Features and Upgrades:
Series:	Install Type <sup>2</sup> :	

1 - Unit Type Key			2 - Install Type Key		3 - Style Key			
<b>W</b> = Wood	<b>V</b> = Vinyl	<b>A</b> = Aluminum	<b>PR</b> = Pocket Replacement	<b>SH</b> = Single Hung	<b>DH</b> = Double Hung	<b>CASE</b> = Casement	<b>BO</b> = Bow	
<b>P</b> = Patio Door	<b>C</b> = Composite	<b>FF</b> = Full Frame Removal	<b>N</b> = Nail Fin	<b>SL</b> = Sliding	<b>G</b> = Garden	<b>AW</b> = Awning	<b>BA</b> = Bay	

Please draw windows below with Frame Dimensions (Exterior View)

FRONT OF HOUSE	Win #	Qty.	Room	Style <sup>3</sup>	UI round up	F1	F2	F3	F4
	F1								
	F2								
	F3								
	F4					F5	F6	F7	F8
	F5								
	F6								
	F7								
	F8								

Front of House - Additional Notes:

BACK OF HOUSE	Win #	Qty.	Room	Style	UI round up	B1	B2	B3	B4
	B1								
	B2								
	B3								
	B4					B5	B6	B7	B8
	B5								
	B6								
	B7								
	B8								

Back of House - Additional Notes:

Please draw windows below with Frame Dimensions (Exterior View)

LEFT SIDE OF HOUSE	Win #	Qty.	Room	Style	UI round up	L1	L2	L3	L4
	L1								
	L2								
	L3								
	L4					L5	L6	L7	L8
	L5								
	L6								
	L7								
	L8								

Left Side of House - Additional Notes:

RIGHT SIDE OF HOUSE	Win #	Qty.	Room	Style	UI round up	R1	R2	R3	R4
	R1								
	R2								
	R3								
	R4					R5	R6	R7	R8
	R5								
	R6								
	R7								
	R8								

Right Side of House - Additional Notes:

Additional Project Considerations for PROvider/IST:

(e.g. HOA Requirements, Lead Assessment, scope of work, pets, parking, etc.)  
Note: This will auto-fill on the customer-facing proposal document.

# Installation Proposal - Windows

Date:



Store #:		PSE Name:	
Customer Name:		2 <sup>nd</sup> Customer Name:	
Customer Phone:		Customer Email:	
Installation Address:		City, State, Zip:	

1. Project Preparation Process	2. Installation Process	3. Clean-up/Final Inspection
<ul style="list-style-type: none"><li>Dedicated project support staff keeps you up-to-date through every process</li><li>Installer conducts Pre-Installation Inspection</li><li>Provides appropriate protection to home during installation</li><li>Obtain &amp; post any necessary permits</li><li>Perform Lead Assessment (if applicable)</li></ul>	<ul style="list-style-type: none"><li>Remove &amp; haul away existing windows</li><li>Check existing windows for leaks and evidence of pest infestation</li><li>Install new windows &amp; accessories, including caulk, stops, and fasteners</li><li>Follow Lead Safe Practices (if required)</li><li>Follow Health and Safety Guidelines</li></ul>	<ul style="list-style-type: none"><li>Complete final clean-up and haul away all job-related debris</li><li>Test product &amp; perform complete inspection with customer</li><li>Review warranty information</li></ul>

<b>Additional Project Considerations:</b> (e.g. HOA Requirements, Lead Assessment, scope of work, pets, parking, etc.)

<b>Window Details and Notes:</b>		
Brand:	Unit Type:	Features and Upgrades:
Series:	Install Type:	

<b>Additional Notes &amp; Product Description:</b>	
<b>Total Investment:</b>	\$
<b>Lowe's Finance Offer Included:</b>	
<b>Quote Good Until:</b>	

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