

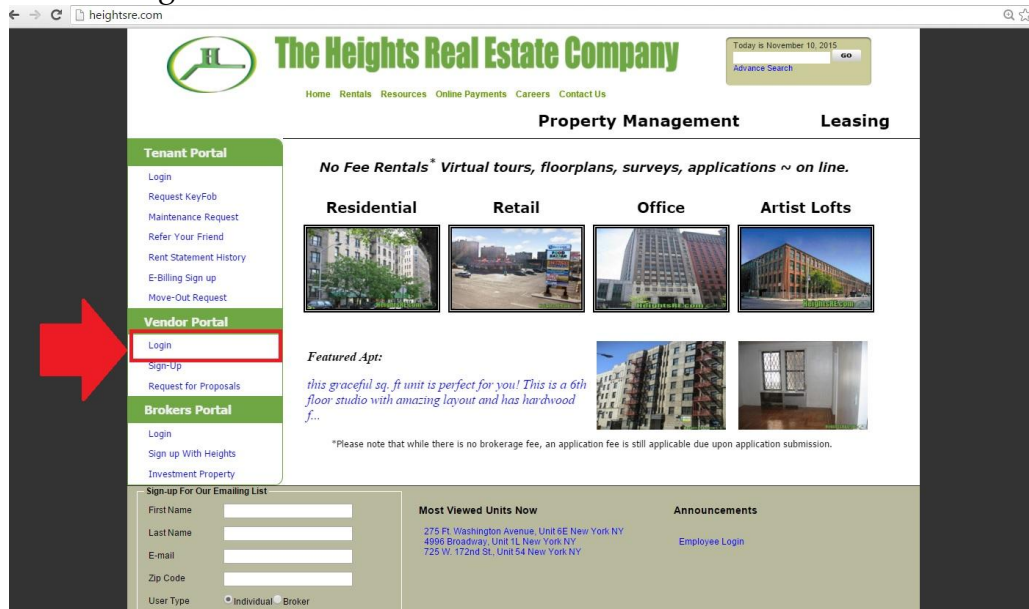
# Heights Management: Vendor Welcome Package – RFP Walkthrough. 10/11/2015

## Section #4

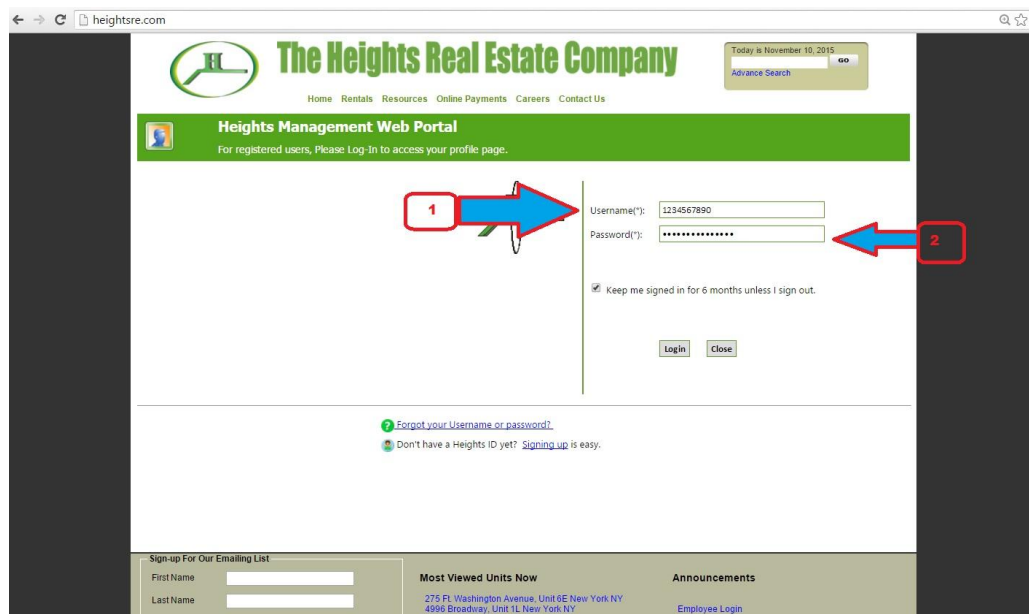
Dear Vendor ,

Please follow the walkthrough and picture sequence below as a guide to the Heights RFP process for vendors. Following this process will allow you to look up jobs to view description, vendor estimates, and primary discussion boards so that you can save time and get paid faster.

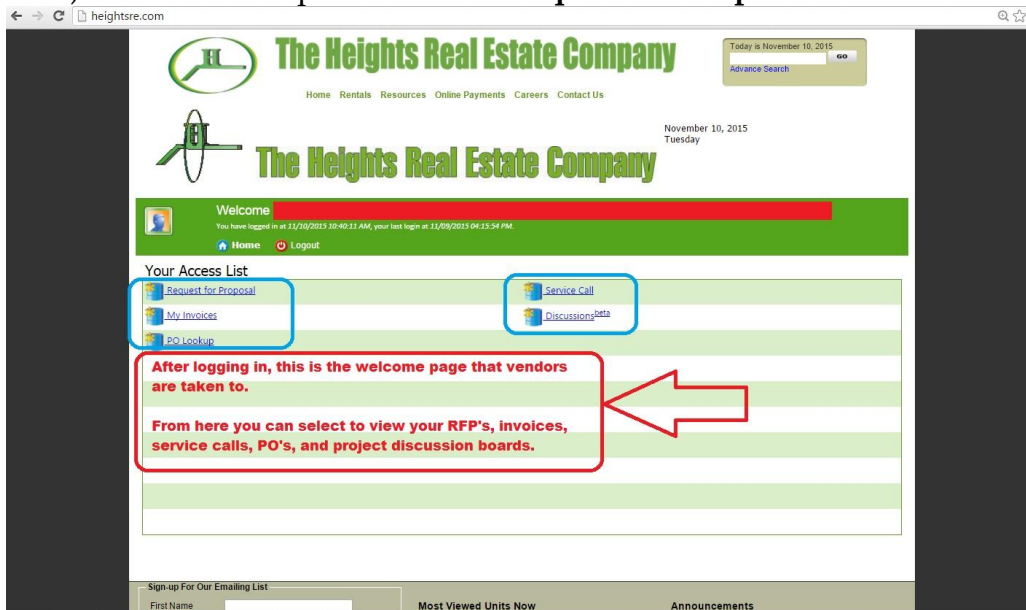
- 1) Go to the Heights Management Website at [www.heightsre.com](http://www.heightsre.com).
- 2) Go to the section labeled “Vendor Portal” and click on the section labeled “Login”



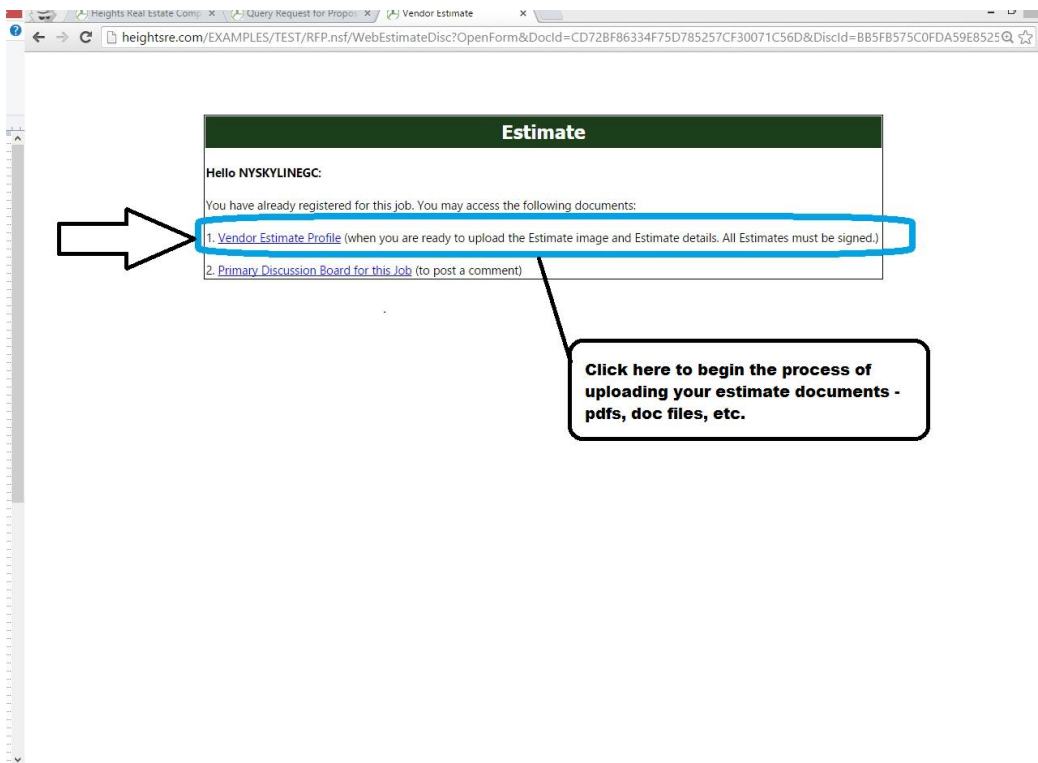
- 3) After clicking login, you will be taken to this page.
- 4) Enter your vendor username and password as shown in the screenshot below.



- 5) After logging in, you will be taken to this page. This is the Vendor homepage. From here, you can select to view your RFP's, open PO's, project discussion boards, service calls and other options.
- 6) Click on the option labeled **"Request for Proposal"**



- 7) After clicking on the link for "Request for Proposal" you will be taken to this page (screenshot displayed below) – with two options – "Vendor Estimate Profile", and "Primary Discussion Board for this Job". Select the top option to begin the process of uploading your estimate documents when ready, select the bottom option to enter the discussion boards to post queries and comments.
- 1) We will start with the estimate upload process. Click the link "Vendor Estimate Profile" to begin.



- 2) Begin the estimate upload process by moving through the steps A to D below and upload the documents as requested.
- 3) Estimate documents must be uploaded along with Estimates on job start dates and completion dates.

**Vendor Services - PO#**

Welcome [Name]

This is your Estimate Management Center for Job# [Job Number]. Please use the below to make your appointment to see the site, upload your quote, references and certificate of insurance.

You can access it anytime by logging in, clicking Requests for Proposal and choosing this Job# [Job Number].

To post a comment, [CLICK HERE](#) to access your DISCUSSION BOARD.

Current Job status: 3 Open Items BEFORE Starting Job

JOB START	OPEN ITEMS	CLOSED ITEMS	SECTION CLOSED
3 Open Items	-Estimate -Select Work Dates -Certificate of Insurance	-PO Number Issued -Sign & Fax Contract -Signed Contract Addendum	
3 Items completed			
Permits			
0 on file			
0 open			
Requisitions			
Punch List			

Save Estimate Details Form

Job Site

Project detail

Bidder Information

(A). Request for Proposal (B). Contract Signing (C). Project Management (D). Contract Administration

Step 1: See Floor Plan Step 2: Call To Setup Inspection Step 3: Upload Estimate and Details

1. Floor Plan

2. Setup Site Inspection

Create Site Inspection

Building Superintendent Rashid Khan

Click To Call Building Superintendent

3. Upload Estimate Here

Vendor's Estimate:

Attachment:

Upload

Current Estimate Price: [Input Field]

Warranty Period: 12 months

Warranty Type: Labor and Materials

Contract signing

Follow these steps. Upload documents as requested

Upload price here.

Upload estimate here

- 4) Once the estimate is uploaded, go to Step B and upload the Signed Contract and your Company Addendum.

- 5) Upload the Certificate of Insurance and Permit files as well.
- 6) Upload the Work schedule and follow steps 5 through 7 to begin closing the estimate upload and job approval/start process.

**Vendor Services - PO#** [REDACTED]

**Welcome** [REDACTED] Please use the below to make your appointment to see the site, upload your quote, references and certificate of insurance. You can access it anytime by logging in, clicking Requests for Proposal and choosing this Job# [REDACTED].  
To post a comment, [CLICK HERE](#) to access your DISCUSSION BOARD.

**Current Job status: 3 Open Items BEFORE Starting Job**

	OPEN ITEMS	CLOSED ITEMS	SECTION CLOSED
<b>JOB START</b>			
3 Open Items	-Estimate	-PO Number Issued	
3 Items completed	-Select Work Dates	-Sign & Fax Contract	
<b>Permits</b>	-Certificate of Insurance	-Signed Contract Addendum	
0 on file			
0 open			
<b>Requisitions</b>			
<b>Punch List</b>			

[Save Estimate Details Form](#)

**Job Site**  
**Project detail**  
**Bidder Information**

(A). Request for Proposal (B). Contract Signing (C). Project Management (D). Contract Administration

**Step 1. PO# Issued:** [REDACTED]  
Please follow the 7 easy step to start the Job.  
The PO# for this job has been approved. Please complete all items below. All items below must be complete before a down payment is issued and the job start authorization is issued.

**Step 2. Signed Contract and Company Addendum**  
Signed Contract: Attachment: [REDACTED]  
Signed Company Addendum: Attachment: [REDACTED]  
[Print](#) [Upload](#)

**Step 3. Certificate of Insurance and Permits**  
Certificate of Insurance: Attachment:  
Permits/Close Out of Permits

**Step 4. Work Schedule**  
Please put in the Date that you will start the job and the approximate completion date of the job as stated on your contract. You can change the scheduled work date up until 7 AM of the actual Work Date.  
Job Start on Site: 11/08/2015  
Job Completion: 12/05/2015

[Save Estimate Details Form](#)

**Upload signed contracts and addendums here .**

**Enter in the estimated start and end dates for your job**

- 7) Click the Save Estimate Details Form (shown in the screenshot above) to proceed to the next steps

**Step 1. PO# Issued:** [REDACTED]  
Please follow the 7 easy step to start the Job.  
The PO# for this job has been approved. Please complete all items below. All items below must be complete before a down payment is issued and the job start authorization is issued.

**Step 2. Signed Contract and Company Addendum**  
Signed Contract: Attachment: [REDACTED]  
Signed Company Addendum: Attachment: [REDACTED]  
[Print](#) [Upload](#)

**Step 3. Certificate of Insurance and Permits**  
Certificate of Insurance: Attachment:  
Permits/Close Out of Permits

**Step 4. Work Schedule**  
Please put in the Date that you will start the job and the approximate completion date of the job as stated on your contract. You can change the scheduled work date up until 7 AM of the actual Work Date.  
Job Start on Site: 11/08/2015  
Job Completion: 12/05/2015

**Work Date Calculator**  
Click here to select work dates. [REDACTED] in the job site, based on the Job Start and Job Completion date that you have selected above. You may also delete dates that you have added, one business day before  
[Add Dates](#) [Delete Date](#)  
Day of Week : Date  
Missing Work Dates, please enter the work dates that you will work on site  
**Add work dates here**

**Step 6. Contract Summary and Daily Reporting Instruction**  
You may print the Vendor Summary Sheet for your reference. It has instructions on how to create a picture report and for leaving call reports.  
[Vendor Summary Sheet](#)

**Step 7. Request for Job Start Authorization**  
[Req For Proposal](#) [Contract Administration](#)


[Save Estimate Details Form](#)

oof repairs and aluminum coating

**Click here when done to proceed to the next step**

8) Step D - if the job is approved

- a. Upload the requisition forms and reports when you are doing the job in order to qualify for payments.
- b. These reports and documents must be uploaded/submitted or payment will not be made.



Vendor Services - PO# [REDACTED]

Welcome [REDACTED]

This is your Estimate Management Center for Job# [REDACTED]. Please use the below to make your appointment to see the site, upload your quote, references and certificate of insurance.

You can access it anytime by logging in, clicking Requests for Proposal and choosing this Job# [REDACTED]

To post a comment, [CLICK HERE](#) to access your DISCUSSION BOARD.

Current Job status: 3 Open Items BEFORE Starting Job

	OPEN ITEMS	CLOSED ITEMS	SECTION CLOSED
<b>JOB START</b>			
3 Open Items	-Estimate	-PO Number Issued	
3 Items completed	-Select Work Dates	-Sign & Fax Contract	
<b>Permits</b>	-Certificate of Insurance	-Signed Contract Addendum	
0 on file			
0 open			
<b>Requisitions</b>			
<b>Punch List</b>			

Save Estimate Details Form

☐ Job Site

☐ Project detail

☐ Bidder Information

(A). Request for Proposal

(B). Contract Signing

(C). Project Management

(D). Contract Administration

Step 1  
Submission of Payment Requisitions

Step 2  
Deductions for missing call / picture report

Step 3  
Punchlist

Step 4  
Close out Job

1. Submission of Payment Requisitions

2 Payments:

Click on the payment link to print the payment requisition form. Fill up all necessary information and upload directly to this document. You may also fax to (212) 217 - 1195.

Pmt#	Due Date	Amount	Deductions	Work Condition	Status	Approved Date	Chk#	Chk Date
1	11/5/2015	[REDACTED]	\$0.00	Down Payment	[REDACTED]	11/09/2015		
2	12/5/2015	[REDACTED]	\$0.00	Final Payment after punchlist completion	[REDACTED]	11/09/2015		

2. Deductions for missing call / picture report  
No Penalty

3. Punchlist

4. Close out Job  
[Contract signing](#)

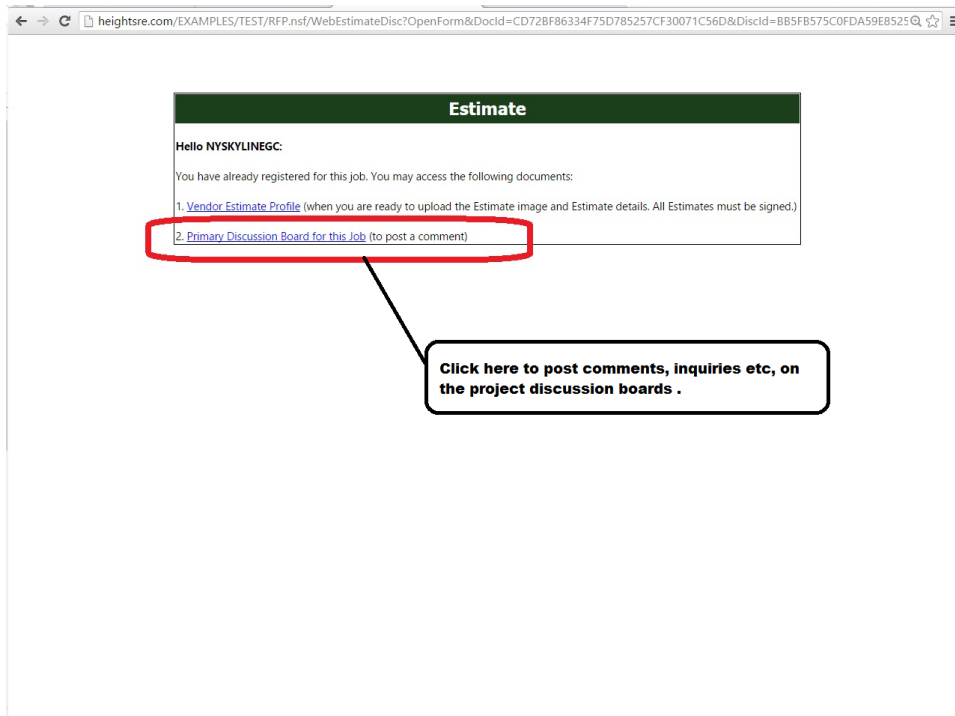
Vendor must upload requisition form and picture reports before the payment will be approved.

Save Estimate Details Form

Roof repairs and aluminum coating

To Post on Project Discussion Boards: We will use discussion boards to communicate as these are electronic workrooms that allow for faster communication. This allows your job to proceed faster and get you paid quicker and save time.

1) Click on the link “Primary Discussion Board for this Job”



2) You will be taken to a discussion board page. These pages are set up to ensure communication. You will save plenty of time and be able to automatically upload your estimate and access your homepage.

How to post:

- 1) Enter your name and email on the right hand side.
- 2) Comments and queries can be made in the big text box in the top-center.  
Click "Submit and Send" to submit the comment.
- 3) Previous postings and the general comment feed can be viewed below the big text box
- 4) Attachments can be uploaded to the discussion board by clicking the attachments link to the top left of the big text box where you would enter your comments.
- 5) To submit an attachment you must enter a comment or query, then upload the attachment.

The screenshot shows a web browser window displaying the Heights Real Estate Company discussion board. The interface includes a header with the company logo and name, a search bar, and a navigation menu on the left with links for E-Mail, Comments Feeds, Participants (7), My Discussions, Call/Text Message, and Attachments (10). The main content area features a discussion thread titled "440 View/Reply/Share/Link" with a "Vendor" field. A red box highlights the "Click here to upload attachments" link, and a blue box points to the "Submit and Send" button. A large text box for entering comments is visible, with a blue box indicating where to enter comments and queries. A blue box on the right side of the interface explains the requirements for posting: "In order to make a post on the board - you must enter your full name and your email address. After the name and address are entered, you can post your comment and upload attachments for evaluation to the discussion board." A blue box at the bottom left indicates that the previous comment thread will be displayed here. The bottom of the page contains a disclaimer: "This message is confidential its contents do not constitute a commitment by Heights Real Estate or any of its affiliated companies except where provided for in a written agreement between you and Heights Real Estate. All forms of electronic communication between all parties listed on this discussion board is being archived and monitored for quality purposes. Any unauthorized disclosure, use or..."

Previous comment thread will be displayed here.

Click here to upload attachments.

Click this icon to submit the comment.

Enter comments, queries etc. here.

In order to make a post on the board - you must enter your full name and your email address. After the name and address are entered, you can post your comment and upload attachments for evaluation to the discussion board.