

UA22-218 Attachment A
The University of Alabama
Supplemental Assisting Dealer Requirements

All quotes should be produced by the Manufacturer's Assisting Dealer(s). The purchase order or purchasing card order and payments will also be made to the manufacturer's Assisting Dealer(s). The University of Alabama utilizes a purchasing card (Pcard) program as a method of payment. The University assumes that all Assisting Dealers will accept the University's Pcard as a method of payment. No additional charges may be added for acceptance of the Pcard.

Working With the Furnishings & Design Department:

The Furnishings and Design (F&D) department within the University is responsible for the interior design of the campus. F&D's responsibilities include managing the furniture design, specification, procurement, and installation on campus for suites, offices, or entire facilities. As such, constant communication between the F&D designers and the Assisting Dealer associated with the order is required. Assisting Dealers may assist departments with a 'one' item purchase (for example – one file cabinet or bookcase), however, it is the vendor's responsibility to let the F&D department know if the project scope grows to multiple pieces or an office of furniture. At that point, an F&D designer will need to oversee the process.

General Guidelines for Assisting Dealers:

- Response to phone calls and emails should be made within 24-48 hours.
- Based on the total volume or needs of a specific project, weekly, bi-weekly, or monthly meeting with F&D may be requested.
- Assisting Dealers must fill out a spreadsheet to track the open P.O.s and PCard orders issued by the University. This document is known as the UA Furniture Log. Each Assisting Dealer should submit this document weekly to the Furnishings and Design Office Associate II by the close of business on Tuesdays. Installations must be listed on the log two weeks prior to the set installation date. Within a week of updating the installation date on the furniture log, design personnel will confirm installation in writing. Any changes to a scheduled installation must be communicated at least 48 hours prior.
- The University of Alabama's [Smoke-Free Campus Policy](#) is strictly enforced. This includes any/all tobacco products.
- Due to the nature of some projects, the University reserves the right to require additional limits of liability insurance coverage.
- Parking fees are the responsibility of the Assisting Dealer. Please refer to the Parking website for parking fees: <http://bamaparking.ua.edu>.
 - Particular attention should be paid to pedestrian traffic and routing of such traffic during the duration of a project.
 - Notification to Emergency Vehicles (Police, Fire, Rescue, Ambulance, etc.) shall be the Assisting Dealer's responsibility.
- It is the Assisting Dealer's responsibility to schedule semi-annual visits to review progress and issues. The University reserves the right to call a meeting to discuss issues that require immediate action; however, the Assisting Dealer should not assume there are no issues if they do not receive a meeting request. Please contact the Director of F&D to set up these semi-annual meetings.

Quoting:

- The turnaround time for Quote/Drawings is a minimum 24 hours, maximum 7 days based on size, scope of work, and nature of Product required.
- The first line of the quote must reference the Contract the items are being purchased from.
- The Assisting Dealer should only quote the Manufacturer(s) Product they are authorized to sell to the University per the awarded Contract.
- On all quotes, the Manufacturer's list price and discount MUST be listed or the order will not be processed.
- Assisting Dealer's should list project information on each quote for identification purposes. The information deemed necessary includes the building name(s), room numbers(s), the person for whom the furniture is purchased, and the F&D project number if applicable. Please note that the person who ordered the furniture is not always the person for whom the furniture is purchased.
- In addition to line item quotes, Assisting Dealers should provide 80/20 split quotes on proposals with more than 10 lines and/or a total purchase price greater than \$30,000. 80/20 split quotes are two line quotes which reflect 80% of the total purchase value on one line and 20% of the total purchase value on the other. Each line should reference manufacturers included on the quote and the line item numbers that make up the percentage total. For example: "80% of Total Manufacturer(s) Product for Building Name. Lines 1-20 on Proposal" 80/20 splits may be requested outside the guidelines stated above, and should be provided in a timely manner.
- If quoting labor, please include the following information: Manufacturer of Furniture, Office Location (building and room) and a brief description of work.

- If quoting disassembly and assembly of furniture and the furniture is assembled in a new location, please include the following: Manufacturer of Furniture, Office Location of disassembly (building and room) and Office Location of assembly (building and room).
- In order track volume discounts on orders, the Assisting Dealer must break out the costs of COM used on furniture items. This will show a discount percentage on the furniture which matches the UA discount on the Contract, and will show the cost of the fabric and freight for the COM separately. An example is shown below for clarity:

7	TES	BCCCB		Cosmos, Sled Chair	UA Bidgood: Conf. 203A	3	\$ 1,385.00	\$ 650.95	\$ 1,952.85	53.000
		~C1 COM1 C6 Ship	Upholstery Fin... Customer's Ow... Frame Finish	Customer's Own Material Maharam: Knob 466250/Tale 002 Chrome COM1=SU#TBD, Maharam: Knob...						
8	Maharam			COM	UA Bidgood: Conf. 203A	6	\$ 0.00	\$ 228.57	\$ 1,371.42	0.000
			Manu Pattern Color Yds Reqd Supplier To be applied to	Maharam Knob 466250 Tale 002 2 yds Dealer BCCCB Tek Studio Cosmos chair						
9	Maharam			Maharam Freight	UA Bidgood: Conf. 203A	1	\$ 0.00	\$ 35.71	\$ 35.71	0.000

- Assisting Dealers are responsible for verifying all site conditions (size of elevator cab, entry door width, stairwell dimensions, substrate type, etc.) and /or all critical dimensions. Assisting Dealer should work with the F&D designer to set up a time to visit the site.
- Any volume discounts should be reflected on the original quotes provided to University personnel.

Samples:

- It is the expectation that Assisting Dealers will be able to provide samples of furniture on an as-needed basis.
- Upon request, Assisting Dealers should also be able to provide two task chairs samples to the [Chair Lab](#) at no charge to the University. Samples for the Chair Lab should be identical in style and finishes selected. The University's standard for Chair Lab samples is an all-black chair. Upon request of the sample the features required will be communicated.

Installations:

- Any changes to a scheduled installation must be communicated at least 48 hours prior.
- The Assisting Dealer's personnel must arrive prepared with the appropriate furniture plans and specifications having a working knowledge of the installation area. Additionally, they should be prepared with directions to the building without having to call University personnel to help navigate them to the specific building on campus.
- Delivery information should list the building name(s), room(s), and the person for whom the furniture was ordered.
- All personnel should have on a shirt with the vendor name as well as a picture ID badge. This includes installations where a subcontractor is used. Failure to have a badge could result in being asked to leave the site until the requirement is fulfilled. Additionally, the University will not allow installers back on campus if complaints are received regarding any actions towards a University student, staff member or faculty.
- Every effort should be made to provide a complete initial installation as scheduled on the furniture log. Assisting Dealer shall make any necessary 'adjustments' and clean the furniture (e.g. wipe it down) as well as vacuum any debris prior to leaving the initial installation.
- Assisting Dealers will be responsible for removal and disposal of all other trash on a daily basis. For larger renovations or new construction, the designer will work with recycling services on campus to locate a recycling container for use during the installation. Assisting Dealers will take the cardboard and plastic to the container daily.
- Installers shall leave appropriate furniture tags and operational manuals in the center drawer of the desk or the top drawer of the pedestal. All other tags should be removed and disposed of by the Assisting Dealer. However, Labels required for warranty claims should NOT be removed. These labels should be placed in an area that is easily accessible after the furniture is installed (i.e. under work surfaces, inside desk drawers) without requiring the end user to move the furniture to find the information.
- Not all buildings on campus are equipped with elevators or loading docks. Assisting Dealers shall not charge any additional fees to install furniture in these locations. It is the responsibility of the Assisting Dealers to inspect all installation sites prior to the installation date.
- Unless arranged otherwise, all installations/deliveries shall be done during the University's normal workday period. Trucks can drive on campus Monday – Friday 8:15 am – 4:30 pm. NOTE: If installation is required outside of normal business hours, arrangements must be made with University security in advance of the installation. Assisting Dealers are to coordinate with the F&D designer in such situations.

Punch Lists:

- Within 24 hours of installation, the F&D designer will visit the site and prepare the punch list of items to be corrected by the Assisting Dealer and/or the University's Facilities department. This information will be forwarded to the Assisting Dealer within 48 hours of the initial installation.
- An adjustment punch item must be completed within 3 business days. For the purpose of this requirement, an adjustment punch shall be defined as an item to be corrected that does not require the Assisting Dealer to order additional parts.
- Punch items that require ordering and receiving parts must be completed within 3 calendar weeks of receipt of the punch list.
- Assisting Dealers are responsible to cover the cost of any damages to interior finishes made during furniture installations. The University's Facilities department will perform any repairs, and F&D will submit invoices to Assisting Dealers for the actual cost of the repairs. These repairs will not be made until the Assisting Dealer is notified of the damages and is provided an estimate of the cost of repair. Payments for repairs should be issued via paper check in order to make sure the correct party is credited. Credit memos should not be issued for F&D invoices issued for repair cost. Paper checks to recoup the cost of damages should be mailed to the Manager of Business Processes for F&D.

Maintaining Previously Purchased Furniture:

- Assisting Dealers are responsible for working with F&D in order to make repairs to furniture previously purchased which is covered under the Contract.
- For items covered under Manufacturer's warranty, expectation is that repairs be made within 6 weeks of the initial contact if new parts are required. If receipt of parts prolongs this time frame, it is the University's expectation that repairs covered under warranties should be made within 2 weeks of the Assisting Dealer's receipt of parts.
- For items not covered under warranty, it is the University's expectation that the Assisting Dealers provide quotes for parts and/or labor in accordance with the Contract discount within 1 week of initial contact. Again, it is expected that repairs be made within 2 weeks of the Assisting Dealer's receipt of parts for repair.
- If no parts are needed for repairs, it is the University's expectation that the Assisting Dealer put the repair on their schedule as soon as time allows, but no longer than 3 weeks from the initial contact.
- Repairs requested by F&D should be listed on the furniture log, even if new parts are not required for making the repairs.

Invoicing / Receipts:

- Invoices for P.O. orders should include the P.O. number and should be sent directly to UA Accounts Payable by one of the following methods: **EMAIL (Preferred):** UAPO_invoicecapture@concurrency.com; **MAILING ADDRESS:** Box 870137, Tuscaloosa, AL 35487.
- Invoices for Pcard orders should be sent to the card holder that placed the order.
- All Invoices should reference the UA purchase order number or Pcard holder, in order to ensure timely payments to the Assisting Dealer.
- Invoices should be sent to the University after substantial completion of the installation of products. It is against UA policy to pay for Product before it is installed.
- Assisting Dealers are asked to send two invoices on 80/20 split orders: one invoice to match the 80% product line and one to match the 20% product line.
- Vendors are asked to send one invoice for orders that do not have an 80/20 split.
- Receipts for Pcard transactions should be sent to the Pcard holder within 48 hours of the Pcard being billed for Products or Services. If this deadline is not reached and University personnel must contact the Assisting Dealer to provide a receipt, Assisting Dealers should provide the documentation requested within 24 hours of initial contact.
- Receipts should be itemized and contain the following information: the building name(s), room numbers(s), the person for whom the furniture is purchased, and the F&D project number if applicable. Please note that the person who ordered the furniture is not always the person for whom the furniture is purchased.

Payments:

- For orders containing an 80/20 split, 80% of the PO total will be released for payment upon substantial completion of the installation. The 20% balance of the PO will be paid after requested punch list items have been corrected. If no punch list items are noted at the installation, 100% of the PO total will be released for payment after installation.
- For orders without an 80/20 split, the PO will be released for payment after substantial completion AND correction of any punch list items noted after the original installation. Again, if no punch list items are noted at the time of installation, 100% of the PO total will be released for payment after installation.
- Questions on payment status on F&D orders should be directed to the Manager of Business Processes for Furnishings and Design.