



THE LIGHT DUDE EDITION

# The Package Is Yours Now

A Lighting Distributor's Guide to Running the Job — From  
Quote to Closeout

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written by **the Light Dude**

# Contents

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- **Preface** — Hey, Man
  - **Introduction** — The PM in the Middle
  - **1.** It Starts With the Quote
  - **2.** Submittals Before You Have the Order
  - **3.** Controls — The Parallel Project
  - **4.** The Order — When It Finally Gets Real
  - **5.** Procurement — Buying It Right
  - **6.** Expediting — Chasing Ship Dates
  - **7.** Delivery & Logistics — Getting It to Site
  - **8.** Changes — Where the Margin Grows
  - **9.** O&M Manuals — The Last Thing You Build
  - **10.** Closeout — Collecting What You Earned
  - **That's the Job**
  - **Appendix A** — Tools of the Trade
  - **Appendix B** — Excel Shortcuts & Tricks
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# Preface: Hey, Man

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Hey. I'm the Light Dude. You maybe know me from the app — bulb head, shades, corner of your screen, never in a hurry. Somebody figured since I know this whole lighting-package thing front to back, I oughta walk you through the actual *job* too, not just which button to click. So, y'know, here we are.

Here's the deal: nobody hands you a manual for running a lighting package at a distributor. You're good on the counter, or good in quotes, and then one day — boom — you're a project manager. Floatin' six-figure orders, chasin' ship dates, standin' right between a contractor who wants it cheap and a factory that owns the calendar. And then you learn the rest the hard way, man. By eatin' the back-charges, like the rest of us did.

This is me savin' you a few of those. It's the whole job, told real easy — the quote, the submittals, the controls, the order, the expeditin', the delivery, the changes, the closeout. No textbook energy anywhere in here. Just the stuff that keeps your money in your pocket instead of somebody else's.

Two things run through all of it, so tuck 'em in your back pocket right now: protect your margin — set it, hold it, grow it — and keep that fixture-type schedule straight, from the first count all the way to the last spare driver. Nail those two and honestly the rest is just details.

Alright. Let's get you lit up.

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# Introduction: The PM in the Middle

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Okay so, like, here's the first thing nobody tells you: by the time that PO actually lands on your desk, you've already done half the job.

You quoted it. You took it off, type by type. You built the submittal package and chased some engineer for three weeks to get it stamped. So the PO ain't the starting line, man — it's just the moment the job you've *been* runnin' this whole time gets real, and now the risk is ridin' on you. Ships late? You hear about it. Wrong trim shows up? You hear about it. Margin walks out the door 'cause somebody bought a fixture at list? Yeah... you hear about that one too.

That's the gig. You're the distributor's PM. You don't design the lighting, you don't hang it — you sit right in the middle. Contractor leanin' on you from one side, the reps and factories holdin' the price and the lead times on the other, and you're the one floatin' all the material in between. You bought it. You're carryin' it on the factory's terms while you wait ninety days and a retention check to get paid. Every little mistake in that stretch comes outta a margin that was thin to start with.

People think this is order entry. Punch in the catalog numbers, hit submit, wait for the truck. Nah, man. The real work is everything *between* the quote and the delivery — keepin' a hundred little things from goin' sideways at the same time. The ack that came back at the wrong voltage. The type F that got value-engineered into a housing that won't take the specified trim. The ship date that quietly slid three weeks while nobody said a word — 'til the EC calls askin' where his light is.

Two ideas hold this whole thing together, so lock 'em in. First one's the money, and I'm not gonna be shy about it: **you set your margin at the quote, you hold it through the order, and you grow it on the changes.** The bid's where you win the work. The changes are where you actually make the money. Everything in between is just you protectin' a number that a dozen little disasters are tryin' to nibble away.

Second idea's the one that protects the first: **the fixture-type schedule is the spine of the whole job.** Every fixture's a type — A1, F2, X3, whatever the designer called it — and that letter's gotta mean the exact same thing from the day you quote it to the day the last carton hits the site. Keep the types straight and the job just kinda flows. Let 'em drift and *that's* where the money leaks — subs nobody approved, shortages you find at the counter, back-charges 'cause the trim didn't

match the ceiling. Guard the type schedule, man. You've basically won before you start.

This ain't a textbook, and it wasn't written from a classroom. It's the job the way it really runs, from the chair. We'll go in the order the package actually moves — quote it, submit it and get it approved, run the controls right alongside the whole way, then get the order and buy it, chase it, deliver it, grow it on the changes, and close it out and get paid. Somewhere in there everything changes at least twice. No sweat — we'll get to that. That's where the money's hidin' anyway.

Read it straight through once. After that, just keep it in the drawer and flip to whatever's on fire.

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# Chapter 1: It Starts With the Quote

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Alright, so — there's no job yet. There's a set of drawings, a bid date, and three or four distributors all sharpenin' pencils on the same fixture package. What you do right here, before anybody's promised you a dime, pretty much decides whether the job's even worth havin'. Mess it up and you'll work real hard just to lose money. So this is where we start, 'cause this is where *your* work starts.

## What you're really competing on

The contractor's takin' three quotes, maybe five. He'll tell you it's all about price — and yeah, price matters — but a distributor who only competes on price is one bad job away from workin' for free, y'know? What you're really sellin' is three things: the number, the availability, and the promise the package shows up right and on time. And here's the thing — contractors forget your number way before they forget the other two. The PM who caught the shortage before the crew got there? That's the reason that EC calls you first next time. Worth more than shavin' two points off a quote you're gonna bleed on anyway.

## The takeoff behind the quote

Your quote's only as good as the takeoff under it, and a lighting takeoff ain't a headcount, man. You're readin' the reflected ceiling plan against the fixture schedule against the spec — three documents drawn by three different people who weren't talkin' to each other. Plan shows sixty type A. Schedule lists fifty-eight. Spec calls for a driver the schedule never mentions. So count by type, catch the mismatches now, and jot down the gaps — the controls package hidin' in a different spec section, the emergency and exterior fixtures everybody forgets, that "furnished by others" line that means it's your problem or it ain't, and you better know which.

**Tool Tip — Bluebeam & LumenCount.** Do the count on the screen, never by hand on a printout. In Bluebeam, set the scale first — don't trust the PDF to be to scale — then use VisualSearch: box one fixture symbol and it finds every match across the whole set. Or the Count tool for the ones sittin' under wiring lines that need your eye. LumenCount takes it further, man — it reads the whole set and counts the types *for* you, so your quote starts from a machine count you just audit instead of a blank page. Either way it comes out sorted by type, which is the whole point.

**Free tool.** On any rebate or energy-code job, peek at the DLC Qualified Products List and DSIRE — both free — before you quote, just to make sure the fixtures you're proposin' really qualify for the rebate the spec's countin' on. Quotin' a non-qualifyin' "equal" is a real good way to win the job and lose the money.

## Set your margin here — on purpose

This is THE number that runs the whole job, so set it like you mean it. Your multiplier off the manufacturer's column — that's your margin, and the number you put on that quote is the ceiling. It only goes *down* from here unless you fight to hold it. Hard-bid commodity lighting runs thin; you'll be lucky to see double-digit GP on a competitive floor. Spec-grade stuff, controls, anything with an approved sub behind it — that carries more room, so know which lines on the job are your margin and which are just the loss leaders gettin' you in the door.

And don't buy the job. When it's slow the temptation's real — sharpen that pencil 'til there's nothin' left. But a job with no margin's got no room for the thing that *always* happens: the sub, the expedite, the re-ship, the liftgate you didn't quote. Price it to win *and* to survive. Can't do both? Eh — let the other guy have the headache.

**Tool Tip — LumenCount.** Your takeoff and your quote shouldn't be two separate jobs, man. In LumenCount the count flows right into the quoting workspace, already sorted by type, so you're just puttin' your markup on a clean fixture list instead of re-keyin' part numbers into a spreadsheet. Price by type, watch the package value build as you go, set your margin on purpose — the whole job in front of you instead of a blank quote form.

## What good looks like at the quote stage

You're good here when:

- Your takeoff lines up the plan, the schedule, and the spec — by type — and every gap's written down.
  - Controls, emergency, and exterior are all counted and priced, not just hand-waved.
  - You set your margin on purpose, and you know which lines are carryin' it.
  - You know what it takes to win this contractor — and it ain't only price.
  - The whole quote's sorted by type, 'cause everything downstream is gonna be too, man.
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# Chapter 2: Submittals Before You Have the Order

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Okay, this next part makes zero sense to anybody who hasn't done it: on a lotta jobs, you build the whole submittal package and chase it through approval *before you even have an order*. No PO. No guarantee, man. You're spendin' real hours documentin' fixtures for a job you haven't won — 'cause that's just what it takes to be the number the contractor can safely buy.

Why though? 'Cause a quote fulla "or-equal" subs ain't worth much 'til an engineer says the equals are equal. If you're pitchin' your lines against a spec that basis-of-designed somebody else's product, the EC can't safely buy your number 'til your package is approved. So you submit to win. On a straight plan-and-spec job the order sometimes comes first and you submit after — but even then, nothin' releases 'til it's approved, so same work, same gate. Approval's the gate, man. No approval, no release, no margin.

## Building the package by type

The submittal's just your quote made official — and it's built, say it with me, by type. Cut sheet for every type, marked up to show the exact catalog number, voltage, mounting, finish, lens, trim — the real thing you're furnishin'. Controls get a narrative and a points list, not just a data sheet, 'cause that's where the engineer's questions live. Anything you substituted gets documented against what it's replacin', so the reviewer can see, line for line, why the equal's an equal. Sloppy submittals come back slow, man. A clean package that answers the questions before they're asked is the difference between one review cycle and three — and on a tight schedule, those cycles are weeks you just don't have.

## Getting it approved — and what "approved" even means

You'll get one of a few answers back. *Approved* — rare, do a little dance. *Approved as noted* — you're approved, but those notes are part of your scope now, so read every one; a note can quietly swap a trim or a finish, and if you ship the old one, that's your back-charge. *Revise and resubmit* — clock resets, so turn it around fast.

The engineer holds the pen, man, and no amount of you bein' right gets you released without their stamp.

## When it comes back: rejections and resubmittals

Alright, real talk — most packages don't sail through the first time. You'll get comments, and how fast and how clean you turn 'em decides whether the job stays on schedule. And here's why a bounce stings you more than it stings the EC: every review cycle burns calendar against a lead-time clock you don't control. A fixture that's ten weeks out don't care that the engineer sat on it for two — bounce it twice and you've blown the on-site date, and now you're either expeditin' on your own dime or shippin' late. So the resubmittal loop ain't paperwork, man. It's schedule. And schedule is margin.

First move, before anything: read the comments like a contract, not an insult. Those notes are your scope now. Don't argue it in your head — just figure out exactly what they're askin' for, 'cause the only goal that matters is not bouncin' a third time.

Then figure out *why* it came back. Really just a few reasons:

- **Package was incomplete.** Missin' a config callout, no controls or dimmin' narrative, no photometrics, a listin' you didn't show. Easy one — add what's missin', turn it same day. Nothin' should bounce twice on completeness, man.
- **Your sub got rejected.** This is the scary one. The "or-equal" you banked margin on didn't take, and now you're back to the basis-of-design or a different equal — usually a different price and a different lead time. Reprice and re-check the lead time the same hour, 'cause this is exactly where "banked" margin disappears.
- **Wrong product — misses the spec.** Somebody missed a requirement: voltage, CRI, color temp, lumens, mounting, or a listin' like IC-rated, wet-location, Chicago plenum. Fix the pick against the spec, not against whatever's easy to ship.
- **Coordination, or it's just unclear.** Ceiling type don't match, it fights the architectural, or the comment itself is fuzzy. Don't guess, man — guessin' is how you bounce again. Fire an RFI, get the answer in writin'.

However it came back, the move's the same: turn it fast, answer every single comment. Resubmit as one clean new revision that hits each note point by point, so the reviewer sees you handled it — not a marked-up copy of the last one. Track the revision number, and make sure everybody downstream knows which one's live, 'cause a rejection that changes a product changes what that type letter *means*. New A1 doesn't flow through to the quote, the order, the tracker? You've got drift — the exact thing the spine's there to stop.

And there's a margin call buried in every rejection, so make it on purpose: was the reviewer enforcin' the contract, or reachin' past it? If your non-compliant sub got knocked back to the base spec you shoulda quoted in the first place — that's your cost, own it. But if the reviewer's requirin' somethin' *beyond* the contract documents — an upgrade the spec never called for — that ain't a favor you eat, man. That's a change. Flag it before you furnish it, price it, route it as a change order. First place the "grow it on the changes" thing shows up, and there's a whole chapter on it later.

One hard rule, no exceptions: never furnish a rejected sub hopin' nobody notices. They notice — out at the jobsite, after it's installed — and a quiet sub turns into a rip-and-replace back-charge that costs you ten times the margin you were tryin' to save.

Last thing, and people always forget it: talk to the EC. Tell him a resubmittal's goin' back, when it'll clear, what it does to the on-site date. A bounce he knows about is a schedule conversation. A bounce he finds out about when the light ain't on the truck is a fight.

**Tool Tip — Procore.** If the job's submittals run through Procore, its revise-and-resubmit routin' kicks the ball back to the submittal manager on its own and keeps every revision as its own timestamped version. Watch the revision number, answer the exact comment, and let that version history be your paper trail the day somebody asks why the A1 changed.

## Approval is where you bank the margin — or lose it

This ties right back to the money, man. An approved sub is real margin in your pocket — you pitched a line with more room, and now you're allowed to furnish it. An *unapproved* sub is a landmine: ship it and you're eatin' a return, a restock, and a rush replacement — and there goes the margin you thought you grew. So don't bank a dime of sub margin 'til the approval's in writin'. And once it *is* approved, that type-to-catalog mapping's locked — that A1 means *this* exact part, from here to closeout. Guard that lock. That's the whole spine.

## What good looks like at the submittal stage

You're good here when:

- Every type's got a marked cut sheet showin' exactly what you're furnishin'.
- Subs are documented against the spec, and no sub counts as money 'til it's approved *in writin'*.

- The "approved as noted" notes got read, folded into scope, and priced.
  - You keep the review cycles down by answerin' the questions up front.
  - When a package bounces, you turn it fast and clean — every comment answered, one new revision, and you know whether the fix is your cost or a change.
  - The approved package locks the type-to-catalog mapping for the rest of the job.
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# Chapter 3: Controls — The Parallel Project

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A fixture's a box. You order it, it ships, an electrician hangs it, it makes light. A controls system? That ain't a box, man — that's a *system*. A bunch of interdependent parts that gotta be specified together, wired right, programmed, and commissioned before any of it does what the drawings promised. And here's the thing to get straight from jump: controls run the exact same gauntlet as the fixtures. You quote 'em, submit 'em and chase approval, order and expedite 'em, deliver and commission 'em — everything else in this book, all over again, on a second track. So you start 'em when you start the fixtures, not at the end. Reason controls gets its own chapter this early is that treatin' it like a late add-on is one of the priciest mistakes in the business: miss one power pack or one compatibility detail and the whole system sits dark on a wall while everybody points at you. Run it like its own project, in parallel from day one, and controls are some of the best margin on the job.

## The controls scope hides in a different spec section

The fixture schedule shows you fixtures. It does *not* show you the controls — and if that's all you quote, you already under-bid the job, man. The controls live in their own spec section, on their own drawings — a controls one-line or riser, a device schedule, and a sequence of operations that spells out how the system's supposed to behave zone by zone. Read all of it. The sensors, power packs, room controllers, wall stations, dimmers, panels, time clocks, gateways — they're scattered across those docs, and every one you miss is either a hole in your quote or a scramble at the end. Quote the whole system, by control zone, same way you count fixtures by type.

## Get the controls rep in early — it's free help

Fixture reps and controls reps ain't the same people, and the controls rep is one of the most useful relationships you got. Controls manufacturers do design-assist: hand 'em the drawings and they'll build you a bill of materials and a riser, flag the components you'd have missed, tell you what talks to what. Costs you nothin', and

it's the best insurance against under-scopin' a system you don't build every day. Bring 'em in at the quote — not after you've won and found the gap.

**Free tool.** Controls-manufacturer design-assist is the most slept-on free resource in the business, man. Send the lighting and controls drawings to the controls rep and ask for a system BOM and riser — they'll spec the sensors, power packs, and controllers for you, matched to the sequence of operations, no charge. It's their job to make their system easy to buy, so let 'em — then check their BOM against the drawings yourself.

## Compatibility is the thing that bites

This is where the callbacks come from, man. Dimming ain't one thing — it's 0-10V, DALI, phase-cut, PWM, and a handful of proprietary protocols — and the fixture's driver's gotta match the control system it's wired to. "0-10V is 0-10V" is exactly the assumption that ends with a room fulla LEDs flickerin' at low dim and a customer who wants it fixed today. Verify the driver and the control play nice before you buy either one, confirm it with both manufacturers, get it in writin' when the job's big enough to matter. Mixin' a fixture line and a controls line that were never tested together is a bet — and you're the one who pays when it loses.

## Scope the commissioning — out loud

Here's the cost everybody forgets: somebody's gotta program and commission the system, and on networked controls that somebody's often a certified or factory tech, scheduled, on site, near the end of the job. Decide up front whether factory startup's included in what you're furnishin' or whether it's extra — then either put it in your quote with a real number, or *clearly leave it out* so the EC knows it ain't yours. A commissioning line nobody scoped is a fight at the worst possible time, when the job's tryin' to close and the lights don't do what the owner expected. Put startup on the schedule the day you take the order — it needs the system installed and powered, so it can't be an afterthought.

## Submittal it like the engineer's gonna fight you

Engineers scrutinize controls submittals harder than anything else, 'cause controls is where compliance lives. Your package needs the sequence of operations, a points list, the riser or one-line, and cut sheets for every device — not just a stack of data

sheets. This is almost always the part of the submittal that comes back "revise and resubmit," so front-load the quality here: the cleaner and more complete the controls package, the fewer cycles you burn on the one part of the job with the least schedule float.

## **The rebate usually rides on the controls**

On a lotta jobs the utility rebate the owner's countin' on is a *controls* rebate — networked lighting controls qualify for incentives plain fixtures don't. Confirm the specified system's on the DLC Networked Lighting Controls qualified list before you quote it, 'cause swappin' to a cheaper controls package that doesn't qualify can quietly kill a rebate worth more than the controls themselves. Get the qualifyin' system right, and document it.

## **Price the complexity — then grow the number**

Controls carry more margin than commodity fixtures, which makes 'em one of the best spots on the job to grow your number — but that margin's payment for real risk: compatibility, commissioning, callbacks, complexity. So price the complexity in. Don't quote a controls system on a fixture multiplier, don't give away the design work, and don't eat commissioning you never scoped. Run it like the mini-project it is — its own scope, its own submittal, its own schedule, its own startup — and controls are where a careful PM turns a thin fixture job into a good one. Run it like a box of fixtures, and they're where a good job turns thin.

## **What good looks like on controls**

You're good here when:

- The full controls system's quoted from the controls spec and the sequence of operations — by zone — not just the fixtures.
- You brought the controls rep in early for design-assist, and checked their BOM against the drawings.
- Driver-to-control compatibility's verified with both manufacturers before anything's bought.
- Commissioning's scoped out loud — included and priced, or clearly left out — and it's on the schedule.
- The controls submittal's got the sequence of operations, points list, riser, and device cut sheets, and it's built to survive review.

- The specified system's confirmed on the DLC networked-controls list wherever a rebate rides on it.
  - Controls are priced for their complexity and risk, not on a fixture multiplier.
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# Chapter 4: The Order — When It Finally Gets Real

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The release lands. After the quote, the takeoff, the submittals, and weeks of chasin' an approval, there's finally a PO with a number on it. Feels like the finish line, man. It's the startin' gun. Everything up to now was you tryin' to win the job. Everything after is you tryin' to keep the money you won it for — and the first hour with that PO in hand decides how much of it you get to keep.

## Reconcile before you order a thing

Put the quote next to the release and go type by type. Count match? Did the EC release the alternate you quoted and got approved, or did he cut the PO against the base spec you priced higher? Are the controls on here, or did he "assume that was included"? Emergency and exterior are the usual spots the money hides — interior gets released clean and the site poles and egress fixtures show up as a surprise in month three, by which point they're your problem and your cost. Find every gap now, in writin', while you still got the leverage of an unsigned order. Reconciliation's fifteen minutes that saves you fifteen grand, man.

## Get a clean PO

Before you buy a single fixture: PO number, terms, freight allowance, tax status, and a delivery expectation you can actually hit — all on paper. "You told me on the phone it'd be here Friday" ain't a document, and it won't help you when an unquoted freight bill shows up. And confirm the release is real. Every distributor's got the story about the six-figure PO that turned out to be a budget number somebody sent by mistake. A two-minute call beats a warehouse fulla gear nobody ordered.

**Controls, in parallel.** The release you're reconcilin' is the *fixtures*, man. The controls package is its own scope — often its own PO, often through a different manufacturer — so reconcile it separately and just as hard. Controls are the classic "I assumed that was included," so before you accept anything, confirm the sensors, power packs, controllers, and the commissioning are all on a PO in writin'. A controls gap found at the buyout is a conversation; found at closeout it's a fight.

## Now hold the margin you set

Here's the middle third of the mantra: you set the margin at the quote, now you defend it. From here the number only leaks, and it leaks in the same predictable spots — freight you didn't quote, a sub that costs more than the approved line, an expedite to make a date you promised, a re-ship after a receivin' error, restocks on what you over-ordered, and retention and slow terms quietly eatin' the cash you're floatin'. None of those are dramatic. They're small — and together they're your whole margin if you ain't watchin'.

Biggest leak's the dumbest one: buyin' it wrong. Catalog and config errors are the number-one way orders go sideways, and a transposed digit or a missed voltage suffix don't announce itself — it shows up as a wrong fixture on a truck, three weeks late, with a restockin' fee attached. Enter the order by type, verify every catalog number against the approved submittal you already locked, and check the config line by line before it goes to the factory. Slow is smooth, man, and smooth is margin.

**Tool Tip — Excel.** Build one buyout reconciliation sheet and reuse it every job: columns for type, qty quoted, qty released, catalog number, cost, sell, and margin — plus a formula column that flags any line where *released*  $\neq$  *quoted*. Freeze the header row, turn on filters (Ctrl+Shift+L), and let conditional formattin' flip a blown-margin line red before it ever ships. One screen tells you whether you're still holdin' the number you set. If your takeoff lived in Bluebeam, its Quantity Link or CSV export drops the counts straight into that sheet.

## The handoff

If your shop splits quotations and project management, the order changes hands right here — and a sloppy handoff undoes everything you just protected. The PM takin' the job needs the whole picture: the quote, the release, the reconciliation, every scope gap you flagged, and every promise the quoter made to win it. What got substituted to get the price? What's the EC expectin' that ain't strictly on the spec? A PM who learns that from the factory three weeks later is already behind. And it all stays filed by type — the schedule that's been your spine since the takeoff carries straight through the handoff, or it quietly breaks right here.

## What good looks like at the order stage

You're good here when:

- The quote and the release reconcile line for line, by type, and every gap's in writin' before you accept the PO.
  - The PO number, terms, freight, tax, and delivery date are on paper — not in a voicemail.
  - You confirmed the release is real, not a budget number.
  - Every catalog number and config's verified against the *approved* submittal before it goes to the factory.
  - You know exactly what your margin is walkin' in, and what's most likely to chip at it.
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# Chapter 5: Procurement — Buying It Right

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You got an approved submittal and a clean PO. Now you go buy the material — and buyin' it right is its own skill, man, 'cause the order you place and the acknowledgment you get back are two different documents, and the space between 'em is where a surprisin' number of jobs quietly go sideways.

## Buy exactly what got approved

Cut your factory POs — usually through the rep — against the *approved submittal*, not the quote you wrote three months ago. Those might not be the same thing anymore: a sub got rejected, a note changed a trim, a revision moved a catalog number. The approved package is the locked version, and it's your buy list. Buy by type, catalog number by catalog number, exactly as approved. Every shortcut here — "close enough," "they'll know what I mean" — is a return waitin' to happen.

## Read the acknowledgment like it's tryin' to trip you

The factory sends back an order acknowledgment — the ack, the OA — confirmin' what *they* think you ordered. Read it like it's tryin' to trip you, man, 'cause sometimes it is. Put the ack next to your PO next to the approved submittal and check three things line by line: the catalog number (exact, suffixes and all), the config (voltage, finish, lens, trim, driver, dimming, mounting — the whole string), and the quantity by type. Factories transpose digits, drop a suffix, ack a similar-but-wrong catalog, or quietly swap in a driver they had on the shelf. Catch it now, before it's in production. Once it's built, "built wrong" is your return, your restock, your delay — and if it's a custom or made-to-order fixture, there's no return at all. Non-returnable stuff gets read twice.

**Controls, in parallel.** Controls hardware — panels, gateways, room controllers, anything custom-programmed — is often long-lead and made-to-order, which means non-returnable, which means you read that ack twice, man. Confirm the ack covers the whole coordinated set from the design-assist BOM, not just the obvious pieces, and confirm whether factory startup's a line on the order. A missin' power pack don't show up on the ack — it shows up at install, when it's too late to be cheap.

## Confirm the price — that's your margin on paper

The ack's got a price on it, and that price is your margin made real. Confirm the acknowledged net — the multiplier or net price you based your number on — matches what you quoted your cost at. Factories and reps ack at the wrong column more often than you'd think, and a couple points at the wrong multiplier is your whole margin on a commodity job. And while you're in there, watch the small stuff that eats a number without ever showin' up as a "price": order minimums, small-order surcharges, freight terms, expedite fees. Ack came back worse than you bought it? Kick it back to the rep before you accept it — not after it ships.

## Confirm the ship date — before it's too late to matter

Somewhere on the ack is a ship date or a promised lead time, and it's the most important line on the page. Compare it — the day the ack lands, not the week before the job needs light — against the required-on-site date. If the ack blows that date, you got a problem *now*, while you still got room to move: escalate to the rep, push the factory, split the order, phase the release. What you do *not* do is file the ack and hope. Every problem you catch on the ack is cheap; every one you catch at delivery is expensive. This is where the next stage — expeditin' — is either set up to win or already lost.

**Free tool.** Most major fixture manufacturers and rep agencies run free online order-status portals now — you can pull live ship dates and trackin' without waitin' on a callback. Bookmark the ones you buy from most; a thirty-second portal check beats a two-day game of phone tag every time a date matters.

## Order early, release smart

Here's the move that separates the PMs who make dates from the ones who chase 'em: the lead-time clock starts when you *order*, not when you want it delivered. So

order early — even when you don't want the material for months — and control the *delivery* separately. You rarely want it all at once anyway; the jobsite can't take it, storage costs money, staged material gets damaged. Set a release schedule by type against the construction sequence — rough-in housings first, finish and trim when they're ready to hang, controls near the end, exterior once the site's poured and the poles can stand. Buy now, release when the field's ready, and never let a hold on delivery turn into a late start on the lead time.

## Track every PO by type

The second you place a factory PO, it goes in a log: PO number, factory, type, catalog, quantity, acknowledged price, promised ship, required on-site. That log is your material tracker, and it's the difference between knowin' where forty fixture types stand and findin' out one's late when the foreman calls. Keep it by type — the same spine that carried the count into the quote and the quote into the submittal now carries the submittal into the warehouse.

**Tool Tip — LumenCount.** This is where LumenCount's material tracker earns its keep, man: it's live-linked to the quote, so every part carries its PO number, ship date, and delivery status by type without you rebuildin' a spreadsheet for each job. One view tells you what's ordered, what's acknowledged, what's shipped, and what's about to be late — exactly the list you want in front of you when an EC calls askin' about his rough-in package.

## What good looks like at the procurement stage

You're good here when:

- You bought against the *approved* submittal, by type — not the old quote.
- Every ack's reconciled to your PO and the approved submittal: catalog, config, quantity, price, ship date.
- The acknowledged price holds the margin you set, and the surcharges and minimums got caught before you accepted it.
- The ack's ship date got checked against the required-on-site date the day it landed, and any gap's already bein' worked.
- Long-lead and non-returnable stuff got read twice, 'cause there's no sendin' it back.
- Every factory PO's logged by type — your material tracker starts here.



# Chapter 6: Expediting — Chasing Ship Dates

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Expeditin' doesn't start when an order shows up late, man. It starts the second you cut the PO — and if you wait 'til the ack comes back at standard lead time to start pushin', you already lost weeks you're never gettin' back.

## Beg for the date when you place the order

When you send the PO to the factory — through the rep — you do *not* accept whatever lead time falls outta the system. You tell 'em the date you need and you ask 'em to hit it. Put the required ship date right on the PO; a PO with no date gets standard lead time by default, and standard's usually the date that blows your schedule. Then work the levers: ask the rep if there's stock to pull from, whether the config qualifies for a quick-ship or express program, whether you can slot into the next production run. Lotta manufacturers run quick-ship on standard configs — if the engineer approved somethin' that qualifies, use it.

The rep's your single best lever, which is exactly why you build that relationship long before you need it. A rep with real pull at the factory can move your order up the queue; a rep you only call when you're desperate can't, or won't. And ask *early*, 'cause expeditin' a fresh order is a favor — expeditin' one that's already three weeks into a six-week build is a fight nobody wins clean.

## The ack tells you whether they heard you

The acknowledgment is the test of your expedite ask. Comes back with the date you needed? Good — now you protect it. Comes back at standard lead time despite everything you said? That ain't a date to file, man, it's a flare to escalate *today*, while the order's still fresh enough to move. Don't accept a bad date quietly and plan to fix it later. Later's more expensive.

## Assume the date'll slip, and chase accordingly

An acknowledged ship date is a promise, and promises slip — usually quietly, usually without anybody at the factory callin' to tell you. So don't set it and forget it. Build a chase cadence tied to how tight the on-site date is: a comfy order you check now

and then; a critical-path type with no float you check every few days. The squeaky wheel really does get the grease here — the orders that get chased ship first, and the ones that sit quiet get bumped when the factory runs short. Be the squeaky wheel, man: polite, specific, relentless.

## **Know the escalation ladder — and climb it in order**

When a date's in trouble, escalate up the ladder, not sideways. Rep first — they own the relationship and usually fix it in one call. Then factory customer service, then the factory's expeditin' or production desk, then the regional or sales manager if the number's big enough to warrant it. Climb it in order and keep it chill; the goal is to make the person on the other end *want* to help you. And escalate with the facts that move people — the on-site date and what happens if you miss it — not just "I need it faster."

## **Allocations and shortages**

Some seasons the product's allocated — a driver shortage, a chip shortage, a hot item everybody's speccin' at once — and now you're competin' with every other distributor for the same units. Relationships win here, and so does havin' ordered early, and so does flexibility: an alternate config the engineer'll approve can be the difference between shippin' and waitin'. Another reason to keep the rep close and the approval conversation open — when supply gets tight, the flexible, early, well-connected buyer gets the fixtures.

## **Expedite what matters, hold what doesn't**

Expeditin' costs money — expedite fees, premium freight, sometimes a worse price to jump the line — and every dollar of it comes outta the margin you've been protectin' since the quote. So spend it on purpose, man. Expedite the critical-path types, the rough-in that's holdin' up the trades behind it; let the trim and the exterior ride the normal schedule if the field won't need 'em for weeks. Don't pay to rush a fixture into a warehouse to sit for two months. But don't be penny-wise either: a late job costs more than premium freight — back-charges, a stalled crew, a customer who remembers. Weigh the expedite fee against the cost of bein' late, and pay it where it buys schedule that matters.

## Tell the EC the truth about dates

Fastest way to lose a contractor is to feed him hopeful dates. Give him real ones, and when in doubt, under-promise — a date you beat builds trust every time, a date you miss burns it. Somethin's gonna slip? Tell him early, while he can still resequence the field around it. "It's gonna be two weeks late, here's the new date, here's what I'd hang first" is a PM he calls again. Silence 'til the light ain't on the truck is a PM he replaces.

**Tool Tip — Excel.** Keep a live chase list separate from your order log: PO number, type, factory, promised ship, required on-site, last-contact date, and next-follow-up date — with conditional formattin' that turns a row red when the follow-up date passes or the float goes negative. Sort by next-follow-up every mornin' and work the top of the list. It's a five-minute sheet that makes sure nothin' ships late 'cause you forgot to call. (LumenCount's tracker does the same at-risk flaggin' automatically if you'd rather skip the sheet.)

## What good looks like at the expediting stage

You're good here when:

- The required ship date went on the PO, and you asked for the expedite the day you ordered — not the day it came back late.
  - The ack got checked against the date you asked for, and a bad date got escalated right away.
  - Critical-path types get chased on a cadence; the rest ride the normal schedule.
  - You know the escalation ladder and climb it in order, with the on-site date as your lever.
  - Expedite money gets spent only where it buys schedule that matters.
  - The EC hears real dates early — especially the bad ones.
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# Chapter 7: Delivery & Logistics —

## Getting It to Site

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The material starts landin', and the job changes character, man. Up to now it's been paperwork and phone calls; now there's pallets, trucks, and a foreman who wants his rough-in. The work shifts to gettin' the right types to the right place at the right time, in one piece — and makin' sure everybody can see where it all stands without callin' you to ask.

### The moment you start releasing, hand the job a tracker

This is where a material tracker stops bein' your private buy log and becomes somethin' you *give the job*. Once you start releasin', the EC and the GC want to know the same thing every day: what's here, what's shipped, what's still out. Answer it once, live, instead of a hundred times by phone. A live tracker — like LumenCount's, linked straight to the quote — lets the customer see every type's status themselves: on order, acknowledged, shipped, received, delivered. It kills the "where's my material?" calls, it makes you look organized 'cause you *are*, and it's the kinda thing a contractor remembers when he's handin' out the next job. Most distributors are still emailin' a spreadsheet that's a week stale. A live one's a differentiator that costs you nothin' to hand over.

**Tool Tip — LumenCount.** The material tracker's built to be shared. 'Cause it's live-linked to the quote, every part already carries its type, PO number, ship date, and status — so "providin' the tracker to the job" is a link, not another document to maintain. The customer watches it update in real time as material ships and lands; you stop fieldin' status calls and keep a clean record of exactly what was delivered when. Turn it on the day your first release goes out.

### Direct ship, warehouse, or will-call

Every release moves one of three ways, and each's got a cost. **Direct ship** — factory to jobsite — saves you the handlin', but you lose the inspection checkpoint: damage shows up at the site, in front of the customer, instead of quietly at your dock. **Ship to your warehouse** and you receive, inspect, consolidate, and stage

before deliverin' on your schedule — more control, more handlin' cost. **Will-call** puts the EC in his truck at your counter — fastest, but now the coordination's on him. Pick per item and per job: the long-lead custom fixture you want landin' at your dock where you can inspect it; the case of standard trims you'll happily direct-ship.

## Release by type, against the field

Deliver the way the buildin' goes together, not the way the material happens to arrive. Rough-in housings first, so the trades behind you ain't waitin'; trim and finish when the ceilings are ready to hang; controls near the end; exterior once the site's poured and the poles can stand. Coordinate the sequence with the EC's superintendent — he knows what the field needs next week better than the schedule does — and release against that, by type. The release plan you set back at procurement meets the real jobsite here, and the real jobsite always has an opinion.

**Controls, in parallel.** Controls deliver on two clocks, not one, man. The hardware needs to land early enough for the electricians to rough it in with the fixtures; the commissioning happens near the very end, once the whole system's installed and powered. So coordinate a tech and a date, not just a truck — the last thing that happens on the lighting package is usually somebody from the controls manufacturer makin' it all work.

## Don't send what the site can't take

Before a truck rolls, confirm the site can actually receive it: somebody there to take delivery, secure storage so it don't grow legs or sit in the weather, and the right equipment — a dock, or a liftgate if there ain't one. A delivery that shows up to a locked gate or a crew that can't unload is a wasted trip, a re-delivery fee, and a pallet of fixtures on a curb. Two minutes of confirmation beats all three.

## Freight without the surprises

Freight's where quiet money leaks. You quoted a freight allowance back at the buyout; now the actual moves gotta live inside it. Watch the extras that don't show up 'til the invoice: liftgate charges, inside-delivery fees, residential or limited-access surcharges, re-delivery, detention. Consolidate shipments where you can, schedule delivery appointments so trucks ain't sittin', and save premium freight for the

expedites that earn it. Every unquoted accessorial is a bite outta the margin you set — small on its own, real by the end of the job.

## Receive it like the claim depends on it — 'cause it does

Whether it lands at your dock or the site, somebody inspects it on receipt: count the cartons against the packin' slip by type, and look for damage before anything gets signed. Note visible damage on the delivery receipt or BOL *before* you sign it — a signature on a clean receipt is you tellin' the carrier everything arrived perfect, and that's real hard to walk back. Open and check for concealed damage fast, 'cause claim windows are short and a crushed reflector inside an intact carton is still your problem once you've signed. File freight claims right away, with documentation. The tracker updates as each type gets received and checked, so the shared view everybody's watchin' stays true.

**Free tool.** Your phone's the cheapest freight-claim tool you own, man. Photograph damaged cartons, the damage itself, and the BOL notation the moment of receipt — a timestamped photo taken before you sign settles a claim faster than any amount of arguin' later. Costs nothin', and it's saved more margin than most software.

## What good looks like at the delivery stage

You're good here when:

- The job's got a live material tracker the day releases start, and the customer can see status by type without callin'.
- Each release moves the smart way — direct, warehouse, or will-call — with inspection where it matters.
- Material arrives in construction sequence, coordinated with the super, not dumped all at once.
- Every delivery's confirmed receivable before the truck rolls.
- Freight accessories get anticipated and kept inside the allowance you quoted.
- Everything's inspected on receipt, damage noted before signin', and claims go in fast.

# Chapter 8: Changes — Where the Margin Grows

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Here's the third and best part of the mantra, man. You set your margin at the quote and held it through the order — and if that was the whole story, most lighting jobs would make a thin, nervous profit and not much else. They don't have to. The bid gets you the work; the changes are where the money actually lives, and a PM who gets that runs the whole job different.

## Why the change is where the money is

Think about the difference. At bid, you were one of five distributors with sharp pencils, and the EC took the lowest workable number — thin by design. A change is the opposite of that. You already got the job. The EC needs the add now, he's got no time to re-bid it, and he can't easily shop it anyway, 'cause it's gotta match the approved package, the manufacturers, and the type schedule you already own. That's pricin' power you flat-out didn't have at bid — and there's nothin' shady about usin' it. The change is a fresh negotiation, and you price it at change margin, not the breakeven number you fought to win the base contract with.

## Catch every change — nothing ships unpriced

Single fastest way to give your margin back is to do change work for free, and it happens the same way every time: "hey, just throw in ten more of the A1." Ten fixtures walk out the door on a handshake, then another add, then a swap, and by closeout you've furnished thousands of dollars of material nobody's payin' for. So the rule's simple and it's got no exceptions, man: every change gets quoted, and every change gets a PO or a signed change authorization *before* it ships. Not after. "I'll get you the paperwork later" is how later becomes never. Free material's a margin leak with your own hand on the valve.

## Is it really a change? Know your scope

Before you bill it, be honest about what it is. If the work was in your original bid and the contract documents, doin' it ain't a change — it's finishin' the job you were paid for, and tryin' to bill it as an extra'll cost you the customer's trust. But if it's truly

*beyond* the original scope — an owner change, an ASI, a field directive, a reviewer requirin' somethin' the spec never called for — that's a change, and givin' it away is just leavin' money on the table. The line between the two is the contract documents, which is exactly why you know 'em cold. Remember those emergency and exterior fixtures from the quote chapter? Whether they're a change or your own missed scope depends entirely on what you bid — and you better be able to prove which.

## **Where changes come from**

Most of 'em fall into a handful of buckets: design changes by ASI or bulletin (fixtures added, deleted, swapped); a sub forced on you when a product's rejected or goes discontinued mid-job; field conditions where somethin' don't fit or a count was off; adds for scope that surfaced late; value engineering goin' the other way, where the owner wants cost out; and plain quantity overruns and underruns. Each's priced a little different, but they all follow the same move — catch it, price it, paper it.

## **Price it on its own merits — and credit fairly**

Price the change for what it is, not by reflex against your bid multiplier. It's a new negotiation with its own margin. When the change runs the other way — a deduct, a VE credit, a deletion — owe a *fair* credit, but a smart one. If the deleted material's already on order, especially custom or non-returnable product you can't send back, a restockin' charge against the credit is legit and you should hold it. You don't refund full value on a fixture you're gonna eat. Deducts are where distributors give away real money tryin' to look generous — be fair, not soft.

## **A change ripples through the whole job**

A change is never just a price, man — it moves through the whole pipeline, 'cause it changes a type. Update the type schedule, the quote, the order, and the tracker so the change propagates instead of driftin'. And here's the part people miss: an added or swapped type often needs its own submittal and its own approval before it can be released — the entire Chapter 2 cycle in miniature, on a compressed clock. A late add with a ten-week lead time on a job closin' in six is a schedule problem, not just a line item, so quote the lead time *with* the price and expedite the change like any other critical type. The change that gets priced but not scheduled is the one that ships late and sours an otherwise sweet add. (This is where a pipeline tool earns its keep — in LumenCount a change is a revised quote that flows into a new submittal

and updates the shared tracker, all still keyed to type, instead of four documents you update by hand and hope you caught 'em all.)

## Paper it, or it didn't happen

Every change lives or dies on documentation. Signed change order or PO revision, referencin' what triggered it — the ASI number, the RFI, the field directive — what's added or deleted, the price, the schedule impact. A verbal change is an unpaid change waitin' to happen; the day there's a dispute, the only thing that speaks is paper. This is the least glamorous part of the job and the one that protects the most margin. Get it in writin', every time.

**Tool Tip — Excel.** Keep a change log for every job: CO number, trigger (ASI / RFI / field directive), type affected, add or delete, quantity, price, PO or authorization status, and schedule impact. One row per change, a column that flags anything shipped without a signed authorization, and a runnin' total of change-order value — so you can see at a glance how much of the job's real margin came from changes rather than the bid. Most PMs are surprised by that number, man. Track it, and you'll price the next bid smarter.

## What good looks like at the change stage

You're good here when:

- Every change is quoted and's got a PO or signed authorization *before* material ships — nothin' goes out free.
- You can tell a real change from your own scope, 'cause you know the contract documents.
- Changes are priced on their own merits at change margin; deducts get credited fairly, with restock held on non-returnables.
- Each change updates the type schedule, quote, submittal, order, and tracker — and added types get submitted and approved before release.
- Lead time and schedule impact get quoted with the price, and critical changes get expedited.
- Every change is documented — trigger, scope, price, schedule — in writin'.

# Chapter 9: O&M Manuals — The Last Thing You Build

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The O&M manual is the last thing you build on a job and — no coincidence — the thing that gets your last check released. Owners require it, contracts hinge on it, and a facility team's gonna pull it off a shelf five years from now when a driver fails and they need to know what to buy. Treat it like an afterthought and it's a miserable scramble at closeout that holds up your money. Treat it like the natural end of a process you ran clean the whole way, and it's an afternoon's work that pays you.

## The O&M is your submittal, grown up

An O&M package is, at its core, your approved submittal plus the docs an owner needs to live with the system: warranties, maintenance and replacement guidance, reorder info, and — for controls — the as-commissioned settings. It's built by type, the same spine that's carried the job since the takeoff. Which means the single biggest factor in how painful your O&M is got decided months ago: if your submittals were clean and organized by type, the O&M's half-built before you start. If your type schedule drifted, the O&M's a scavenger hunt for what got installed.

## As-built, not as-spec'd

One rule separates a real O&M from a wrong one, man: it documents what got *furnished and installed* for each type — after every approved sub and every change — not what the original spec called for. This is exactly where drift punishes you. If the type A1 got value-engineered at submittal, upgraded by a change order, and swapped again when the first line went discontinued, the O&M's gotta reflect the fixture hangin' in the ceiling right now, with its warranty and its reorder number. Keep the type schedule honest through all that — count, quote, submittal, order, change — and the as-built's just your current record. Don't, and you're up a ladder with a flashlight readin' labels.

## What goes in it, by type

For every type, the owner needs the as-built cut sheet, the warranty docs, maintenance and replacement guidance (relamp instructions where they apply,

driver or module replacement where the LED ain't serviceable), and the catalog number to reorder. For controls it's heavier: the as-commissioned settings, the sequence of operations as it runs, programming backup, and the integrator's contact info. Round it out with manufacturer contacts and your own — you want to be the name in the binder when they need parts. And note the spare parts and attic stock the spec required you turn over; the material handoff's part of the closeout package too.

## **Gather warranties early — don't scramble at the end**

The warranty's the part everybody leaves 'til the last day, and it's the part that's scattered: the fixture, the driver, the LED module, and the controls can all carry different terms from different manufacturers. Collect 'em as you go, or keep a library, so you ain't emailin' a dozen factories the week the owner's demandin' closeout. The distributors who close fast are the ones who never treated warranties like a last-minute chore.

## **It's a payment gate — so it's the last place you protect the money**

Here's why the O&M matters to a PM and not just a clerk: on most jobs it's a condition of substantial completion, retention release, or final payment. No O&M, no final check — it's that direct, man. Every day the manual's late is a day your money sits in somebody else's account. You've protected this margin since the quote; don't let a document you coulda built weeks ago hold it hostage at the finish line. Build it early, turn it in on time, and the last dollar comes when it should.

## **Make yourself the reorder source**

There's an upside past just gettin' paid. A clean O&M with your reorder info in it makes you the obvious call when a fixture fails or the owner expands — replacement drivers, lamps, matchin' fixtures, controls parts, for years. That's future margin at full price, no bid, from a customer who already trusts you. The O&M ain't just the end of this job; done right, it's the front door to the next one.

**Tool Tip — LumenCount.** The O&M runs on the same engine as the submittal, so LumenCount builds it the same way: by type, pullin' the as-built cut sheets, datasheets, and warranties from your library into a branded, indexed package that reflects the products furnished, not the base spec. 'Cause the takeoff, quote, submittal, and changes all lived in one place keyed to type, the as-built's already there — the O&M's a generate-and-review, not a rebuild.

**Free tool.** No platform for it? You can still turn out a professional O&M for nothin', man: pull current warranty and datasheet PDFs from the manufacturers' own sites, then merge 'em into one *bookmarked* PDF — a table of contents by type the owner can actually navigate. A free PDF tool that adds bookmarks turns a pile of cut sheets into a real manual. Slower than a generator, but a clean, bookmarked, by-type O&M beats a fat unsorted binder every time.

## What good looks like on the O&M

You're good here when:

- The manual's built from the *as-built* package — the products furnished — organized by type.
- Every type carries its cut sheet, warranty, maintenance and replacement guidance, and reorder number.
- Controls include the as-commissioned settings, the sequence of operations, and integrator contacts.
- Warranties got gathered along the way, not scrambled for at the end.
- The O&M's turned in on time, 'cause it gates substantial completion and your final payment.
- Your reorder info's in it — you're the source for parts and for the next job.

# Chapter 10: Closeout — Collecting What You Earned

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You can run a flawless job and still lose the margin at the finish line, man. Closeout's the least excitin' phase and the one that decides what the job made — 'cause this is where the number you set at the quote, held through the order, and grew on the changes either lands in your account or quietly leaks away in uncollected retention, unbilled changes, and punch that was never yours to eat. The work's basically done. Gettin' paid for it is a job of its own.

## **The punch list — fix yours fast, don't eat what isn't**

At substantial completion, the architect or owner walks the job and writes a punch list: a damaged lens here, a wrong finish there, a fixture that's the wrong color temp, a control that don't do what the sequence promised. Some of it's yours — product you furnished that arrived wrong or damaged — and some of it ain't: fixtures the electricians dinged durin' install, a mountin' problem, a design miss. Triage every item by who owns it. Handle your own fast, 'cause open punch holds closeout and closeout holds your money; a replacement trim that takes you two days is cheaper than the retention it's sittin' on. But don't reflexively eat punch that belongs to the installer or the designer — replacin' a fixture the crew damaged is a back-charge you should be issuin', not absorbin'. Sort it by type, document what's yours, clear it.

## **Attic stock — the closeout item everyone forgets**

Most specs require spare stock — attic stock — turned over at the end: a percentage of each fixture type, spare drivers, extra lenses, replacement lamps where they apply. Easy to forget 'cause it ain't part of the workin' install, and forgettin' it is a classic way to have your closeout — and your retention — held up over a box of spares. Furnish it, turn it over with a signed transmittal so there's proof it changed hands, and if the attic stock's scope beyond your base bid, bill it. Get the receipt, man. "We never got the spares" is an argument you win with a signature and lose without one.

## **Retention — your margin is sitting in it**

All job long, the EC or GC held back a slice of every payment — retention, usually five or ten percent. Do the math on that: on a thin bid, your entire margin can be sittin' in retainage, which means 'til you collect it you haven't made a dime. And retention don't release itself. You invoice for it, you meet the conditions — substantial completion, O&M turned in, punch closed, lien waivers exchanged — and then you follow up, and follow up again. This is where distributors leave real money behind, not 'cause they didn't earn it but 'cause they didn't chase it. Treat retention like the margin it is, and go get it.

## **Final billing — capture every change**

Closeout's your last, best chance to make sure everything that left your warehouse got billed. Reconcile the whole job: the base contract, plus every approved change, minus any credits and deducts. Then check your POs against your invoices, 'cause somewhere in the run of "just send ten more of the A1" there's almost always material that shipped and never got billed — that's your margin walkin' out the door for free. The change log you kept back in the changes chapter is the tool here; run it against what you invoiced and collect the gap. Bill it complete, bill it once, and bill it before memories fade.

## **Protect your lien rights**

The other half of gettin' paid is protectin' your right to be paid if the job goes sideways. File your preliminary notices early — usually near the start, not the end — and be careful with waivers: a conditional waiver's fine to exchange for a payment you're expectin', but never sign an *unconditional* waiver before the check's cleared. The mechanics vary by state and none of this is legal advice — but knowin' your lien deadlines and rights on every job is part of the job, and it's the leverage that gets a slow-payin' contractor to release your retention.

## **The warranty starts now — and you're the conduit**

The day the job closes, the warranty clock starts, and for the life of it you're the owner's path back to the factory. A driver fails in year two, the owner calls you, you run the RMA. Keep the O&M and warranty info where you can find it, set the expectation for how claims work, and treat the callbacks as what they are — a cost, yeah, but also a standin' reason the customer keeps your number.

## The last impression is the next job

Closeout's the last thing the customer remembers, and a clean one — punch cleared, documents in, spares delivered, retention squared without drama — is what puts you first on the next bid list. So close it like it matters, 'cause it does. And close it internally too: run the final reconciliation and look at what the job made, and how much of it came from changes rather than the bid. That number's the most honest teacher you got — it tells you whether you're biddin' right, protectin' the margin through the middle, and growin' it where the growin' happens.

**Tool Tip — Excel.** Build a one-page closeout reconciliation and run it every job: base contract, plus approved changes (from your change log), minus credits, equals what you should collect — then a PO-to-invoice check that flags anything shipped but unbilled, a retention line with the amount outstandin' and the release conditions, and an attic-stock and O&M checkbox. It's the single sheet that tells you the job's truly done and truly paid. (If the whole job lived in LumenCount, the quote, changes, and tracker are already there to reconcile against — the "what did we make" number's a lookup, not an archaeology dig.)

## What good looks like at closeout

You're good here when:

- Punch is triaged by owner: yours cleared fast, and what ain't yours back-charged, not absorbed.
- Attic stock's furnished and turned over with a signed transmittal — and billed if it's an add.
- Retention's invoiced, its conditions met, and actively chased 'til it's collected.
- Final billing reconciles base plus changes minus credits, with every shipped item invoiced.
- Lien rights are protected, and no unconditional waiver's signed before the money clears.
- The O&M and warranty path are set, and the job closes clean enough to earn the next one.

# That's the Job

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That's the whole thing, man, start to finish. You quoted it and set your margin. You submitted it, ran the controls right alongside, chased the approvals. You bought it right, expedited it, delivered it, grew the number on the changes, turned over the O&M, and closed it out and collected. And underneath every one of those stages, one thing held it all together — the type schedule, the spine that kept the A1 meanin' the same fixture from the first count on the takeoff to the last spare driver in the attic-stock box.

Keep the letters straight, and set the margin, hold it, and grow it — and you ain't just movin' boxes of light fixtures. You're runnin' the package. And that's the difference between a distributor who fills orders and one the contractor can't build without.

Catch you on the next one.

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# Appendix A: Tools of the Trade

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A workin' PM's toolkit, plus the handful of tips in each that actually save time. None of these replaces judgment, man — they just take the grind outta the parts that shouldn't need a brain. And where a job runs on rebates or energy code, the free tools at the end are worth knowin' cold.

## Bluebeam Revu — takeoff and markup

- **Calibrate the scale first.** Don't trust the PDF to be to scale; set or calibrate the page scale before you measure anything.
- **VisualSearch is your fixture-counter.** Box one symbol and it finds every match across the whole set — the fastest honest count there is.
- **Count tool** (Measurements tab, the tally-marks icon) for symbols that vary or sit under wiring lines and need your eye.
- **Build a Tool Set / Tool Chest** with one stamp per fixture type, and reuse it across every job so your A1's always the same mark.
- **Custom Columns** in the Markups List: add a Unit Price column and a Formula column and you've got live cost as you count.
- **Quantity Link** live-links markup totals into an Excel template (Complete license on Revu 21+; eXtreme on older). No link? Markups List → Summary → CSV export.
- Use a **Legend** for a clean totals block right on the sheet.

## Procore — the GC's submittal and project hub

- You're usually the **supplier feedin' the EC**, not the account holder — but read the log fluently anyway.
- **Ball-in-Court** tells you whose desk the submittal's on right now.
- **Required On-Site Date + Lead Time** tell you when your release truly has to land — line your buy up to those, not to the EC's optimism.
- **Revise-and-resubmit** routing keeps every revision as a clean, timestamped audit trail — worth its weight the day a dispute shows up.
- **Spec-section numbering** ties each submittal back to the spec book, keepin' your type letters and the spec married.
- Invited as a **Submitter**? Watch for "Action Required," attach by type, respond same-day — you don't need a paid seat to respond to what you're invited to.

## LumenCount — AI takeoff through closeout

- **Upload the drawing set and it counts fixtures by type**, so your takeoff starts from a machine count you audit, not a blank page.
- **Quote from the count**: the takeoff flows straight into the quoting workspace, already organized by type — price by type and put your markup on without rekeyin' a thing.
- **Submittals & O&M, built from the takeoff**: assemble branded submittal and O&M packages by type, with datasheets and warranties pulled from your library.
- **Material tracker / shipment schedule**: live-linked to the quote, so PO numbers, ship dates, and deliveries all track by part.
- **Photometrics**: room-by-room average footcandles, coefficient of utilization, and photometric reports off the same takeoff.
- Keeps the **type schedule as the spine** end to end — count → quote → submittal → tracker → photometrics — so the A1 can't drift between stages.
- **Quote-only** path when you're skippin' the takeoff (manual entry or CSV/Excel import), a **"We'll do it for you"** service tier for overflow weeks, and a **Mark up a PDF** entry point for standalone redlining.
- *(Founder's-desk note: this is your tool — tune this page in your own words.)*

## Excel — where everything lands

- **One reusable buyout/reconciliation template**: type, qty quoted vs released, catalog number, cost, sell, margin, and a flag column.
- **Freeze panes** (View → Freeze Top Row) so headers stay put down a long fixture list.
- **Tables (Ctrl+T)** plus filters to slice by type or manufacturer in a click.
- **Conditional formatting** to turn a blown margin red on sight.
- **XLOOKUP / VLOOKUP** to pull cost against catalog numbers; **SUMIF** to total a package by type; a **PivotTable** for a fast by-type or by-vendor summary.
- Muscle-memory shortcuts: **Ctrl+;** (today's date), **Alt+=** (autosum), **Ctrl+Shift+L** (filters), **F4** (repeat action / lock a cell reference), **Ctrl+Arrow** (jump to the edge of the data).
- **Free alternative**: Google Sheets does all of this and shares live with the whole team.
- **Full cheat sheet**: the shortcuts and tricks worth memorizin' are in Appendix B.

## Free tools worth knowing

- **DLC Qualified Products List** and **ENERGY STAR** — confirm a fixture qualifies for the rebate or code the spec's countin' on. Free.
  - **DSIRE** — the rebate and incentive database, searchable by state and utility. Free.
  - **Acuity Visual** and **DIALux** — photometric layout and footcandle calcs without payin' for AGi32. Free.
  - **Adobe Acrobat Reader** — basic cut-sheet markup when you don't have Bluebeam or LumenCount. Free.
  - **Manufacturer config/spec tools** — clean, current cut sheets straight from the source. Free.
  - **Google Sheets** — the free Excel, with live sharing built in.
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# Appendix B: Excel Shortcuts & Tricks

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Every chapter in this book sent you to a spreadsheet, man — the takeoff log, the buyout reconciliation, the chase list, the change log, the closeout reconciliation. Here's how to build and drive 'em fast, so the spreadsheet works for you instead of the other way around. *(On a Mac, swap Ctrl for Cmd on most of these.)*

## Moving around a big fixture list

| Keys                                | What it does                              |
|-------------------------------------|-------------------------------------------|
| <b>Ctrl + Arrow</b>                 | Jump to the edge of the data block        |
| <b>Ctrl + Shift + Arrow</b>         | Select from here to the edge              |
| <b>Ctrl + Home / Ctrl + End</b>     | Top-left / bottom-right of the used sheet |
| <b>Ctrl + Space / Shift + Space</b> | Select the whole column / row             |
| <b>Ctrl + Page Up / Page Down</b>   | Flip between worksheet tabs (jobs)        |
| <b>Ctrl + F</b>                     | Find a catalog number or type fast        |

## Entering and editing fast

| Keys                                | What it does                                                                      |
|-------------------------------------|-----------------------------------------------------------------------------------|
| <b>Ctrl + ;</b>                     | Insert today's date (ordered / received / last contact)                           |
| <b>Ctrl + Shift + ;</b>             | Insert the current time                                                           |
| <b>Ctrl + D / Ctrl + R</b>          | Fill down from above / fill right                                                 |
| <b>Ctrl + Enter</b>                 | Fill the whole selection with one entry at once                                   |
| <b>Alt + Enter</b>                  | New line inside a cell                                                            |
| <b>F2</b>                           | Edit the active cell in place                                                     |
| <b>Ctrl + E</b>                     | Flash Fill — auto-extract a pattern (e.g., pull the voltage out of a part number) |
| <b>Double-click the fill handle</b> | Copy a formula down the entire column instantly                                   |

## Formatting

| Keys                         | What it does                                                  |
|------------------------------|---------------------------------------------------------------|
| <b>Ctrl + 1</b>              | Open the Format Cells dialog                                  |
| <b>Ctrl + Shift + \$</b>     | Currency format (cost / sell / margin)                        |
| <b>Ctrl + Shift + %</b>      | Percent format (margin %, retention %)                        |
| <b>Ctrl + T</b>              | Turn the range into a Table (auto-fill, auto-expand, filters) |
| <b>Ctrl + Shift + L</b>      | Toggle filters on/off                                         |
| <b>Alt → H → O → I</b>       | Autofit column width                                          |
| <b>View → Freeze Top Row</b> | Keep headers visible down a long list                         |

## Formulas that earn their keep

| Function / key                      | What it does for a PM sheet                                         |
|-------------------------------------|---------------------------------------------------------------------|
| <b>Alt + =</b>                      | AutoSum the column                                                  |
| <b>F4</b>                           | Lock a reference with \$ while editing — or repeat your last action |
| <b>SUMIFS</b>                       | Total sell or cost by type, or by manufacturer                      |
| <b>COUNTIFS</b>                     | Count fixtures by type or by status                                 |
| <b>XLOOKUP</b> (or VLOOKUP)         | Pull cost or description against a catalog number                   |
| <b>IF</b>                           | Flag <i>released</i> ≠ <i>quoted</i> , or margin below your floor   |
| <b>TODAY()</b> / <b>NETWORKDAYS</b> | Days to the required-on-site date; lead-time and follow-up math     |
| <b>SUBTOTAL</b>                     | Totals that ignore filtered-out rows                                |

## Tricks that save the most time

- **Make every log a Table (Ctrl + T).** Formulas fill down on their own and the range grows as you add fixtures — no more draggin', man.
- **Conditional formatting is your early-warning light.** Turn a row red when released ≠ quoted, when margin drops below your floor, or when a follow-up date's passed. You see the problem before you read the sheet.

- **Drop-downs keep status honest.** A data-validation list (On order / Acknowledged / Shipped / Delivered) stops the same status gettin' typed five different ways and keeps your filters clean.
- **PivotTable for the instant summary.** Drop your line items in and get sell-by-type, cost-by-manufacturer, or count-by-status in seconds — refresh with Alt + F5.
- **Paste values only (Ctrl + Alt + V, then V).** When you paste from Bluebeam, an email, or another sheet, strip the formatting and formulas so nothin' downstream breaks.
- **Text to Columns / Flash Fill** to split a pasted part-number blob into clean fields — manufacturer, catalog, voltage, finish.
- **SUBTOTAL + filters** for live filtered totals: filter to one type and the total re-figures to just that type.
- **Freeze the top row and the first column** so both the headers and the fixture type stay on screen while you scroll a hundred lines.
- **One template, every job.** Build the takeoff log, buyout reconciliation, chase list, change log, and closeout reconciliation once, save 'em as a template, and start every job from the same clean sheets. The discipline that protects your margin's a lot easier when the spreadsheet already knows what it's lookin' for.