

READ ME FIRST

Process Standards Walk Thru

Detailed *Process*

1. Our Mission
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3. Get Started
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14. Shopping List / Purchasing
15. Construction Support
16. SketchUP Standards are [here](#).

1. Our Mission

- a. This is Our Mission
- b. These are our (3) Voices & Prompts
 - i. I come from a position of authority as servant leader. Our brand voice is not too formal, it is a grounded, confident, real-world voice. In general, we are an authority that speaks in plain English meant to help people.

Confident Operator – Sharp & Clear

- Direct, professional, and efficient
- Great for technical breakdowns, instructions, and high-trust communication
- Maintain exact terminology and direct code references when relevant

Sample Tone:

"We reviewed the submittal set and flagged two zoning items you'll need to revise before resubmitting. See the notes on Sheets A2.1 and A3.0."

Chat Prompt:

"Write this in a direct, professional tone. Prioritize clarity, structure, and efficiency. Maintain exact terminology and direct code references. Assume the reader is sharp and busy."

Confident Operator – Smooth Diplomat

- Warm, calm, and reassuring
- Ideal for client updates, onboarding, and sensitive pivots
- Natural phrasing, no jargon

Sample Tone:

"Totally normal for plans to hit a few review bumps—especially with this city. We'll revise the notes and keep things moving. Nothing major here."

Chat Prompt:

"Use a calm, friendly, and reassuring tone. Keep language natural and human. You're a capable guide, not a distant expert."

Confident Operator – Bold Closer

- Energetic, decisive, and persuasive
Best for sales, CTAs, and motivating action
Confident and clear without being pushy

Sample Tone:

"This is a strong layout—it gives you the storage you need, keeps the kitchen open, and adds real value. If you're aligned, we'll move forward and get it priced."

Chat Prompt:

"Make this confident and energizing. Use persuasive language and end with a clear call to action. Keep it clean and bold, not pushy."

2. The 4 Steps

- 1
- 2
- 3
- 4

3. Get Started

- Install **visual** fonts & plot style from the [Install First Folder](#) before you begin.
- You will be given access to a Job Folder with subfolders already created. If you are having access issues, please contact **visual** immediately. Download this folder to your device. [Sample Job Folder Setup](#)
- Familiarize yourself with the samples located in any template file provide as well as anything in the [Sample Set Folder](#)

4. Your Dashboard

Updated 03.13.25

- You will be given a link to a Dashboard that has shortcuts to our resources as well as your assigned tasks. Once familiar with our software, you can customize your Dashboard as you see fit.
- Task : Status
 - In progress
- Person : Date
 - In progress
- General Status Overview:
 - .0's** - the first few status' are **managed by our CRM** team, with '.02Kick Off' being the signal to start the work.
 - .1's Pre Permit** Submittal Tasks
 - .2's Post Permit** Submittal Tasks
 - .9's - Onboarding Consultants** to use Our System. More [HERE](#)
 -
- Everything Else will be trained on an as needed basis!

STEP NAME	Status: MASTER	Status: OVERVIEW & START	Status: PERMIT DRAWINGS	Status: PERMIT SERVICES	Status: FEES
Surveyor	.94 Proposal Approved / Send Base Files		.94 Proposal Appr		
Geo-tech	.00 Pending Approval		.00 Pending Approval		
Structural Engineer	.00 Pending Approval		.00 Approved		
PERMIT SERVICES			.02 Kick Off		
External Fees	1.1 Pending Approval		.16 Initial Draft in Progress		
DETAILED DESIGN	.00 Pending Approval		.17 QA / Code Check		
Landscape	.00 Pending Approval		.17 Field Verify Request		
BID	.00 Pending Approval		.17 Field Verify Answer		
			.18 Revise		
			.19 QA / Detail Check		
			.20 Submit - See Permit Services		
			.21 In Review - See Permit Services		
			.22 Revise per Review - See Permit Services		
			.23 QA / Response Letter		
			.24 Re Submit		
			.25 Permit Approved - See Permit Services		
			.26 Revise Post Approval		
			.27 QA Post Approval		
			.28 Re Submit, Post Approval		
			x. Closed		
			x. Paused		
			x. Not Included		
			--Consultant Onboard--		
			.91 Send Consultant Package		
			.92 Proposal Issued (Consultant)		
			.93 Proposal to Client (Consultant)		
			.94 Proposal Approved / Send Base Files		

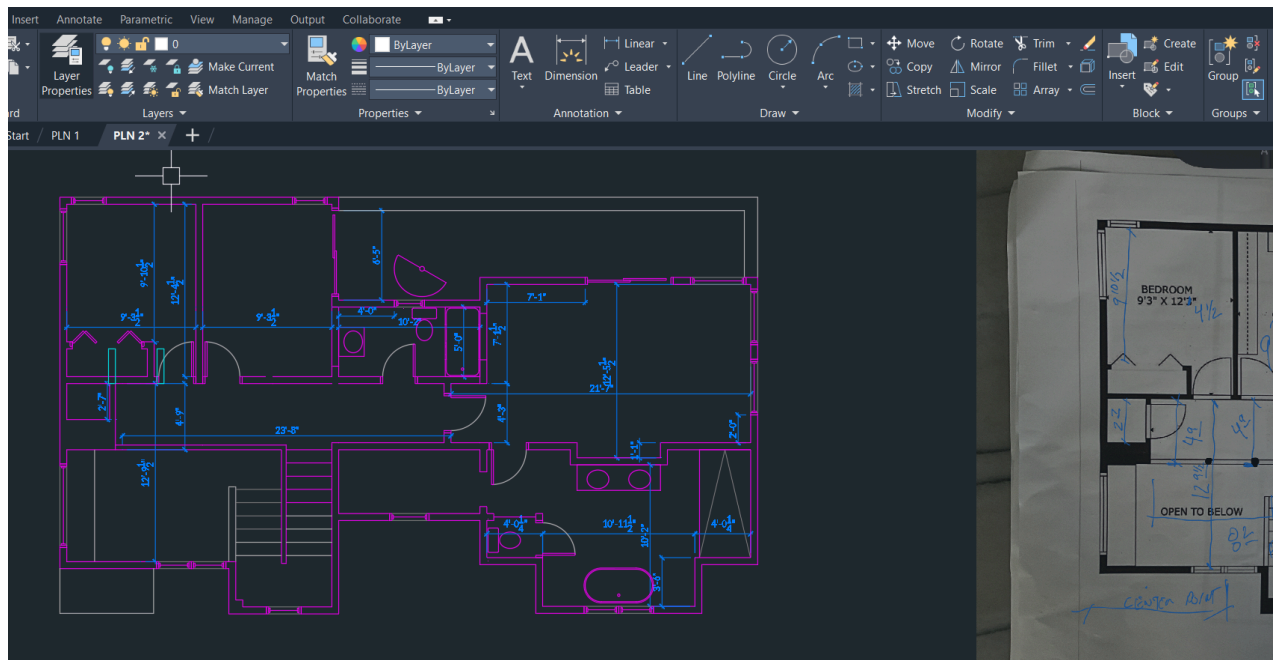
5. Finding

- Deliverables
- Working Files
- Smartsheet
- Google Drive

6. Current Situation

Updated 08.05.24

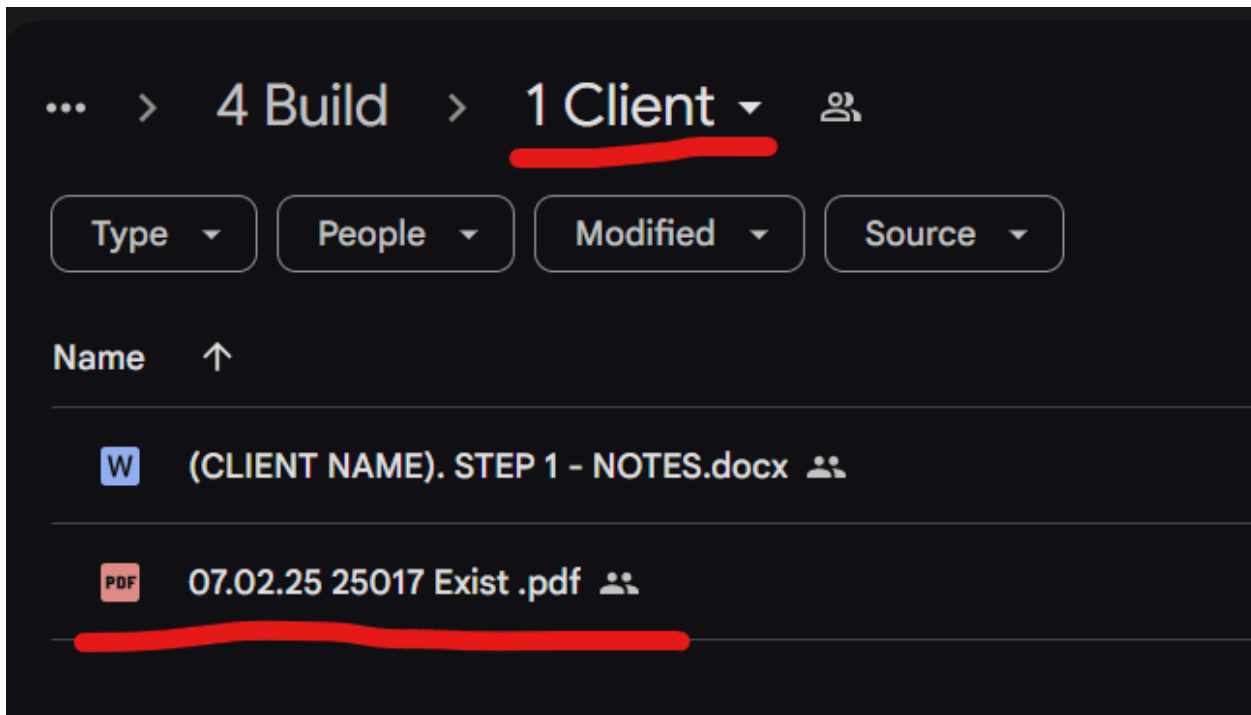
- a. Our Existing Condition drawings are simple and contain only a few layers by design.
- b. Use the Job Dashboard link you've been sent to access all files.
 - i. If you haven't been given a link to a specific job, you can use the [Existing Conditions Template](#)
- c. The Existing Plan should fit inside the perimeter shown by any provided surveys.
- d. Use the Virtual Tour (*linked in comment section*) to layout interior walls, doors & windows.
- e. **Control Dimensions & photographs are provided in the Existing Conditions Dashboard link**
- f. Existing **Interior Walls** are drawn at **4" Thick**, **Exterior Walls at 6" Thick**, *unless* photographic or noted evidence is provided
- g. When delivering first draft, please provide dimension strings showing provided control dimensions have been met in .dwg format
 - i. **STATUS CHANGE: 2. QA**



- h. **Any needed updates will be sent back to you**
 - i. **STATUS CHANGE: .04 QA**

i. **First Deliverable:**

- i. PDF of the necessary plans using the WEB Page Setup and placed in the Visual Folder (no direct link provided yet) :



- ii. Save CAD file in CAD/Xref folder, (Permit Drawings Dashboard Link) as necessary

- iii. STATUS CHANGE: 4. Ready for Visuals

- j. As the project progresses, each team may request existing control dimensions to be taken.

- i. STATUS CHANGE: F.05 Field Verify Request

7. Site Plan

Updated TEMPLATE 07.26.24

- If you haven't been given a link to a specific job, you can use the [Site Plan Template](#)
- You may receive a Site Plan or Survey from a third party consultant. Our goal is to extract the relevant graphics and notation into our Layer Standards and Page Setups.
- Copy** the linework into our template above.
- Adjust the **Units** in Model Space to Architectural
- Check the **Scale** of the original file in Model Space so that you'll be drawing 1:1

- f. You can choose to use **Layer Merge** of the consultant layers to match visual layer standards - or - you can simply trace and erase using our layer standards in the template

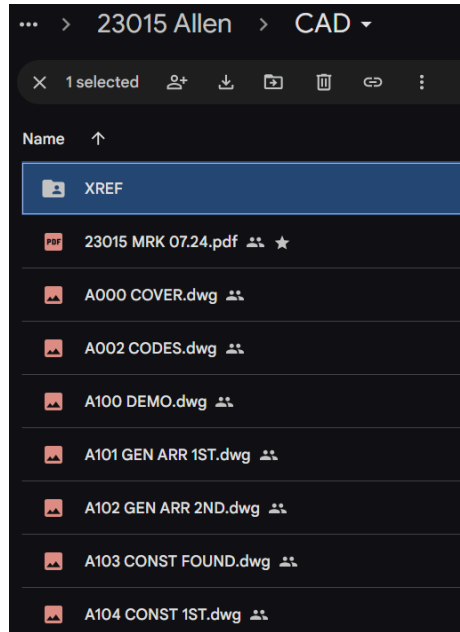
8. Visual *Package*

Updated 08.04.24

- a. This is a free form package where we develop ideas for our clients to make project related decisions. Feel free to use hand sketching, inspiration images, collages or any other method you feel will best communicate the design intent.
- b. **From CAD:**
 - i. **Draw your plan/elevation/whatever you need as per Template**
 - ii. **Use the WEB Page Setup (titleblock may not always be nec'y.) and place PDF in the Visual Folder**
 - iii. **Save CAD file in CAD/Xref as necessary**
 - iv. **Export PDF as .png's as necessary to use in visual package**
- c. **Use Google Slides Template**
- d. *Use InDesign Template (coming soon)*
- e. **From SketchUp**
 - i. **Check out our [Video Resources](#)**

9. Permit *Drawings*

- a. Our AutoCAD files simple and contain only a few layers by design.
- b. Use the Job Dashboard link to access all files.
- c. From CONSULTANTS



10. Purchasing *Package*

Selections & Shopping Progress

Step 1: Early Coordination

- **QA Check for Snapshot**
(We're reviewing everything before it goes to you.)
- **Revising the Snapshot**
(We're making internal updates or corrections.)

Step 2: Client Review Begins

- **Sent to You for Review**
(You'll get a full Snapshot with selections to review.)

- **In Your Review**
(You're currently reviewing or sharing feedback.)

Step 3: Edits & Final Approval

- **Your Revisions Requested**
(You've asked for changes — we're working on them.)
- **Approved by You**
(Your selections have been approved — thank you!)

Step 4: Shopping List Prep

- **Shopping List In Progress**
(We're organizing everything into a clear list for purchasing.)
- **QA Check for Shopping List**
(We're double-checking quantities and details.)
- **Revising the List**
(Final tweaks before sending your list.)

Step 5: Client Review (Round 2)

- **Shopping List Sent to You**
(You now have the detailed list to review.)
- **Shopping List Under Review**
(You're reviewing or confirming the final list.)

Step 6: Final Approval

- **Shopping List Approved**
(We're cleared to move forward.)

Purchasing & Delivery

- **Availability Check**
(We're checking if all items are still in stock.)
 - **Substitutions Needed**
(A few items may need alternatives — we'll follow up.)
 - **Substitutions in Review**
(Waiting on your response or final call.)
 - **Ordered as Approved**
(We're placing orders — no further action needed.)
 - **Invoices Open**
(A payment or deposit may be due.)
 - **All Deliveries Scheduled**
(Everything is in motion — delivery dates set.)
-








Final Step

- **Closed**
(Selections are complete! On to the next phase.)
 - a.
 - b. Delivery date - if it says, Wednesday or a single date - the start & finish are the same. Sometimes it says, "3-5 business days" so the start date would be 3 days and the end date would be the 5 days.

- c. And that's the 'Arrival Window' - English is stupid. We can open a window in our house and also use it to describe a gap in time.

10:11AM Wed Apr 16

24024 Carelli Ferguson Order

AGE	Description	Manufacturer / Supplier	Link	Q'ty	Price per	PRICE SUB	Start	Finish	Status JRNL	Assigned To
2	+\$325.88 Tax	Ferguson				\$3,170.64				
3		Ferguson								Visual
4	 Amerock Monument 6-5/16 Inch Center to Center Handle Cabinet Pull Model: BP36572FB	Ferguson	https://w...	51	\$6.43	\$327.93			p5. Order as Approved	Visual
5	 Amerock Monument 12-5/8 Inch Center to Center Handle Cabinet Pull Model: BP36911FB	Ferguson	https://w...	3	\$14.59	\$43.77			p5. Order as Approved	Visual
6	 GE 1 HP Continuous Garbage Disposal with Drain Boost Technology and 32 Ounce Grind Chamber Model: GFC1020N	Ferguson	https://w...	1	\$218.00	\$218.00				
7	 Delta Trinsic Pull-Down Kitchen Faucet with On/Off Touch Activation, Magnetic Docking Spray Head Model: 9159T-BL-DST Finish: Matte Black	Ferguson	https://w...	1	\$681.58	\$681.58				
8	 White Kraus Turino 33" Farmhouse Single Basin Fireclay Kitchen Sink with Basin Rack and Sound Dampening Model: KFR1-33GWH	Ferguson	https://w...	1	\$549.95	\$549.95				
9	 Delta Contemporary Round Instant Hot Water Dispenser - Less Tank Model: 1930LF-H-BL	Ferguson	https://w...	1	\$374.60	\$374.60			p5. Order as Approved	Visual
10	 InSinkErator HWT300-F3000S Digital Instant Hot Water Tank and Filtration System Model: 45629-ISE Item: bc4596657	Ferguson	https://w...	1	\$648.93	\$648.93			p5. Order as Approved	Visual

p7. Schedule Delivery (See De...
 p8. Arrival Window
 p9. Return / Replace / Damaged
 x. Closed

Clear

- d. Approved Detail Design Drawings

11. Permit Services

- STEP Begin - Permit submittal date.
- STEP Complete - Permit approval date based on specific jurisdiction estimated review times. Always put the longest projected timeline from the city, plus 2 weeks.
- NEXT Task - Used for pre-application task and resubmittals.
- this date is sometimes in My Building Permit systems. If not, put this date on the following Monday - and every Monday we can not follow up by email with these reviewers.
 - This way this can be done before our Monday meeting. I would put you in Team: Next Task By for these jobs until the status' changes (we can look at those together if they don't make sense to you) at which point

you can change Next Task by to Elijah. You can bill probably 15 minutes to each client in Permit Services each week.

STEP NAME	Status: MASTER	S... N...	DB LINK	Step: Notes	Step: BEGIN	Step: NEXT TASK DUE	Step: CUSTOMER DELIVER	Step: COMP...	Team: NEXT TASK BY	TEAM: Exterior	S E
Reviewer 1	0.34 In Review	VISL	Stephr	Zoning Reviewer	03/11/25	04/01/25			E Elijah Gilmer	EL Eric Lenz	
Reviewer 2	0.34 In Review	VISL	Stephr		03/11/25	04/01/25			E Elijah Gilmer		
Reviewer 3	0.34 In Review	VISL	Stephr		03/11/25	04/01/25			E Elijah Gilmer		
Reviewer 4	0.34 In Review	VISL	Stephr		03/11/25	04/01/25			E Elijah Gilmer		
Reviewer 5	0.34 In Review	VISL	Stephr		03/11/25	04/01/25			E Elijah Gilmer		

Permit Services, Review 04.07..25

Every Monday prior to team meeting:

1. keep your name on these reviewers. check the status on the system (Elijah said he showed you and if you come across a new one - ask him) -OR-
- 1a. email them direct a standard email, 'how's the permit review going? (we'll work on this)

				For reference, your record number is: 7066340-CN-001.						
Reviewer 4	0.34 In Review	VISL	Stephr		03/11/25	04/07/25			A Sophia Daniluk	
Reviewer 5	0.34 In Review	VISL	Stephr		03/11/25	04/07/25			A Sophia Daniluk	
STRUCTURAL	21 In Review - See Permit	VISL	Stanhu		10/31/24	04/07/25			F Frank Bua	JK Josh

- 2.If there's nothing new - push the date to the following Monday and keep your name.
3. If there's something to Download or we received an email - change this to .35 (sometimes .33) keep date, change to Next Task to Elijah, Carl or Frank.

e. ELIJAH YOU CAN ADD HERE.

12. Construction Support

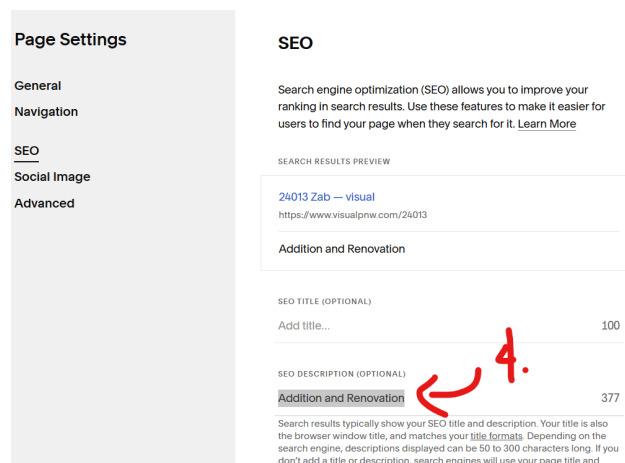
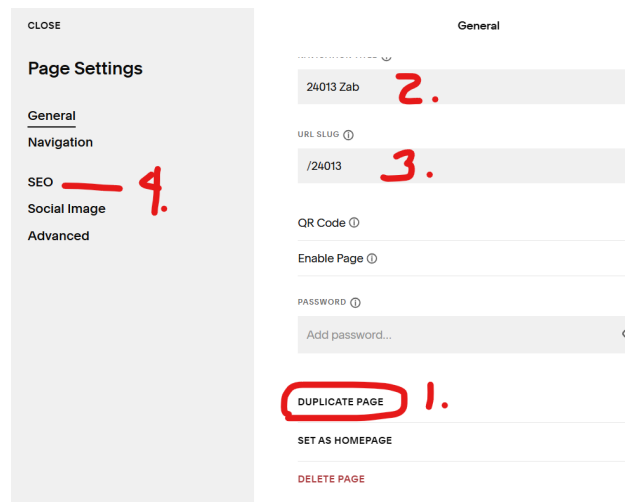
a. Status?

SETTING UP A DASHBOARD

Setting Up Dashboards

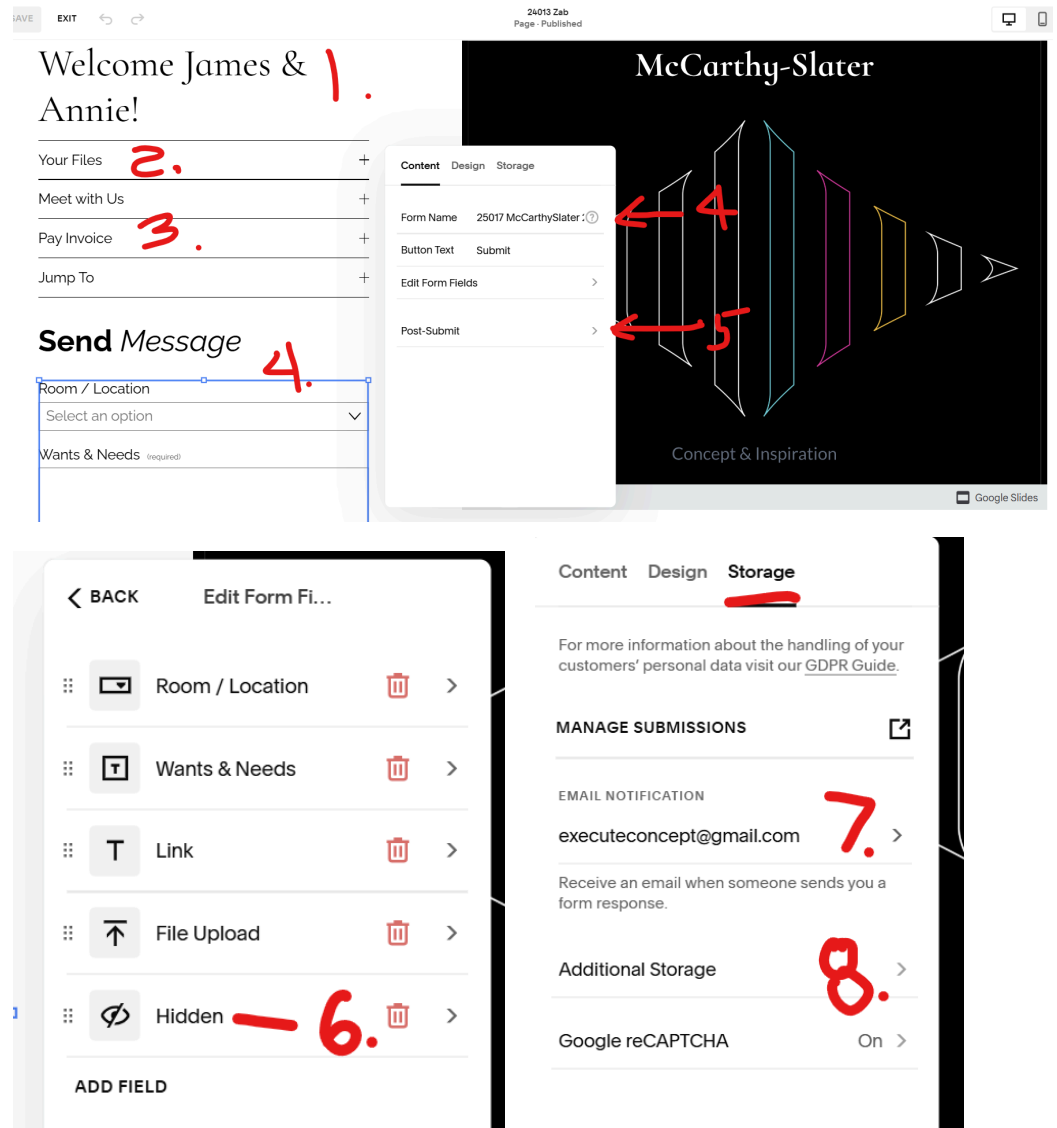
13. Squarespace

- a. Go to Squarespace, click on the gear symbol of a previous dashboard.
 - i. Duplicate Page
 - ii. Change Page Title to Job # and first 3 letters of Last name
 - iii. Change URL SLUG to Job #
 - iv. Click SEO and change the description to the Job Type.



- b. Edit the Page
 - i. Change **Client Name**
 - ii. Route to their **Client deliverable folder** on Google Drive
 - iii. Fix **Pay Invoice Link**
 - iv. Change Form Name
 - v. Change **Post submit to the new URL** you just created
 - vi. Change **Hidden field to job number**
 - vii. Remove the Email from Storage

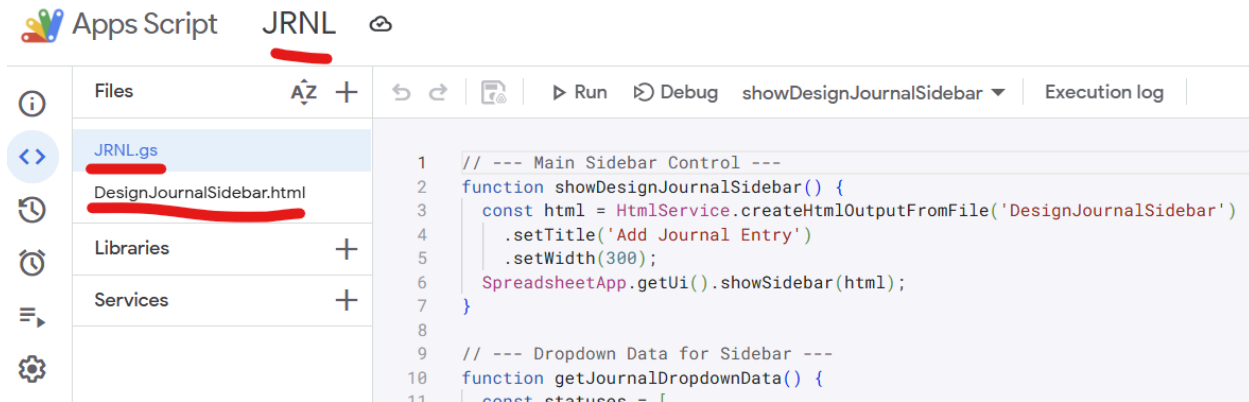
viii. Create Additional Storage - name it **JOB # JRNL**



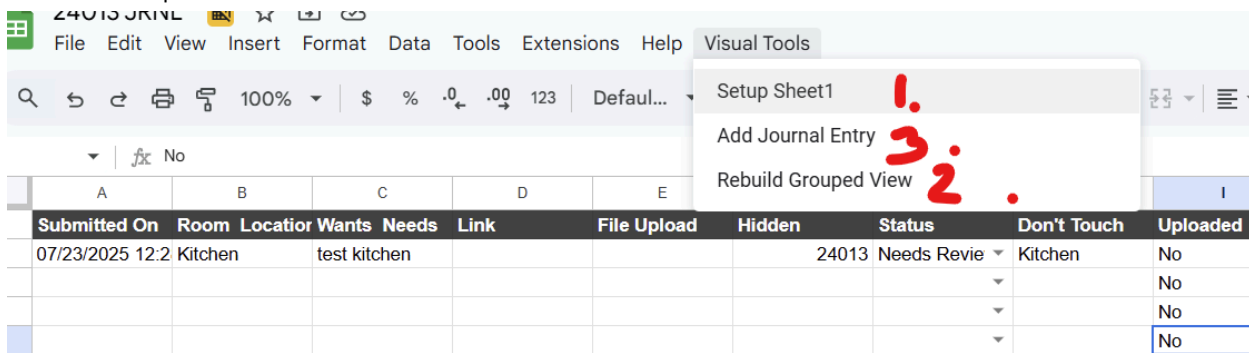
- c. Open the new URL and do a **test Form Entry to create** the new Design Journal, make sure it gets **moved to the correct job folder!**

14. Google Drive

- Open **JOB# JRNL**, go to **extensions, apps script**
- Copy and paset **JRNL.GS** code and **DesignJournalSidebar.html** from **RC1 Scripts**



c. Run the scripts



- Publish the Design Journal Sheet.
- Copy link to ChatGPT with the following prompt:
- Open Visual slides presentation→Share→Publish
- Copy link to ChatGPT with the following Prompt.
- Paste the returned Code back to the Squarespace in their proper place.

15. Smartsheet

a. Open Project Journey and Project Team and Insert Job Number in the top cell.

<input type="checkbox"/>	<input type="checkbox"/>	24013 Project Journey	Workspace	Frank Bua	1 minute ago
<input type="checkbox"/>	<input type="checkbox"/>	24013 Project Team	Workspace	Frank Bua	1 minute ago

- Publish each Sheet.
- Copy link to ChatGPT with the following prompt:
- Paste the returned Code back to the Squarespace in their proper place.
-

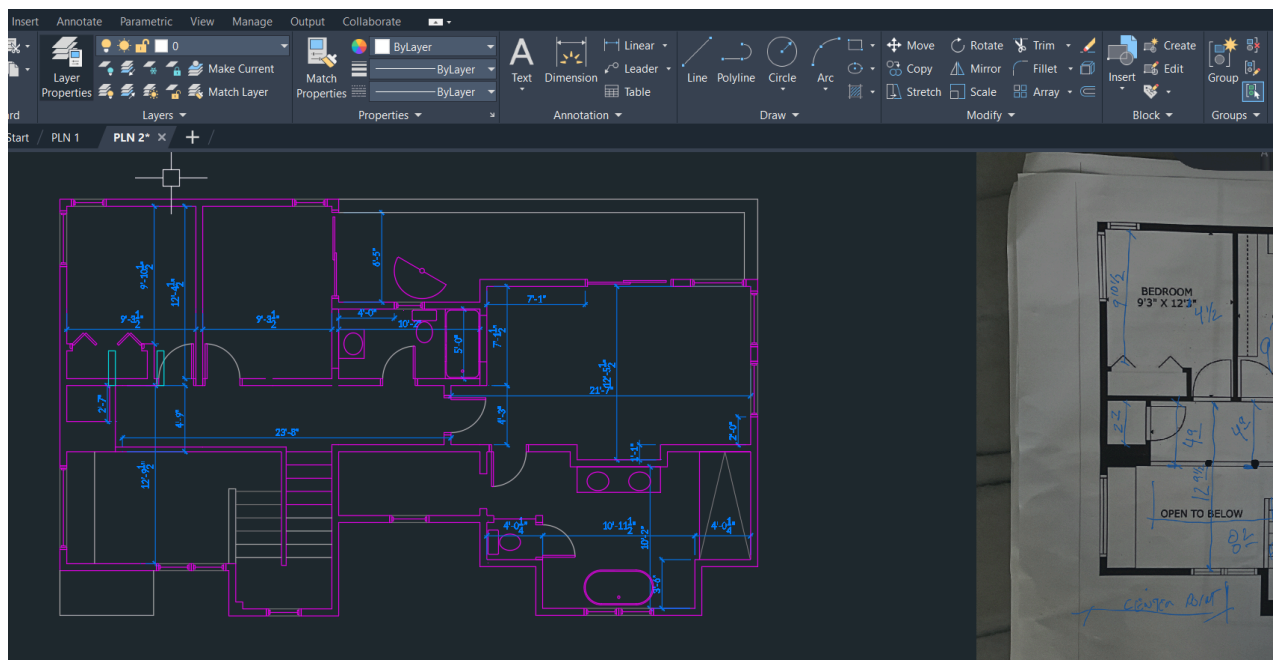
16.

Existing Conditions

Existing Conditions

Updated 08.05.24

- a. Our Existing Condition drawings are simple and contain only a few layers by design.
- b. Use the Job Dashboard link you've been sent to access all files.
 - i. If you haven't been given a link to a specific job, you can use the [Existing Conditions Template](#)
- c. The Existing Plan should fit inside the perimeter shown by any provided surveys.
- d. Use the Virtual Tour (*linked in comment section*) to layout interior walls, doors & windows.
- e. **Control Dimensions & photographs are provided in the Existing Conditions Dashboard link**
- f. Existing **Interior Walls** are drawn at **4" Thick**, **Exterior Walls at 6" Thick**, *unless* photographic or noted evidence is provided
- g. When delivering first draft, please provide dimension strings showing provided control dimensions have been met in .dwg format
 - i. **STATUS CHANGE: 2. QA**

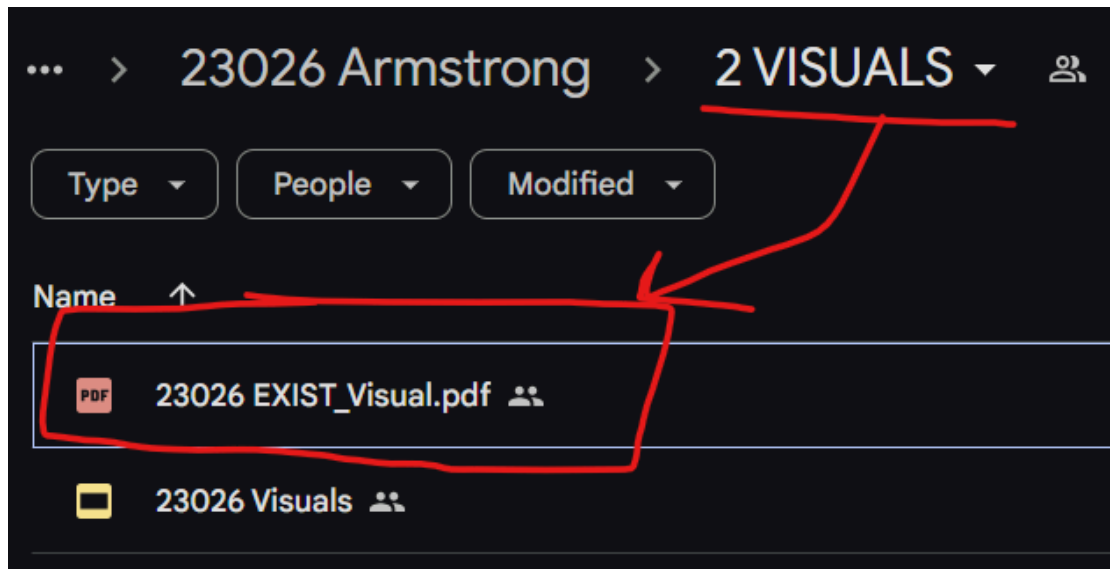


- h. **Any needed updates will be sent back to you**

- i. **STATUS CHANGE: .04 QA**

i. First Deliverable:

- i. PDF of the necessary plans using the WEB Page Setup and placed in the Visual Folder (no direct link provided yet) :



- ii. Save CAD file in CAD/Xref folder, (Permit Drawings Dashboard Link) as necessary

iii. STATUS CHANGE: 4. Ready for Visuals

- j. As the project progresses, each team may request existing control dimensions to be taken.

- i. STATUS CHANGE: F.05 Field Verify Request

17. Site Plan

Updated TEMPLATE 07.26.24

- If you haven't been given a link to a specific job, you can use the [Site Plan Template](#)
- You may receive a Site Plan or Survey from a third party consultant. Our goal is to extract the relevant graphics and notation into our Layer Standards and Page Setups.
- Copy** the linework into our template above.
- Adjust the **Units** in Model Space to Architectural
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- You can choose to use **Layer Merge** of the consultant layers to match visual layer standards - or - you can simply trace and erase using our layer standards in the template

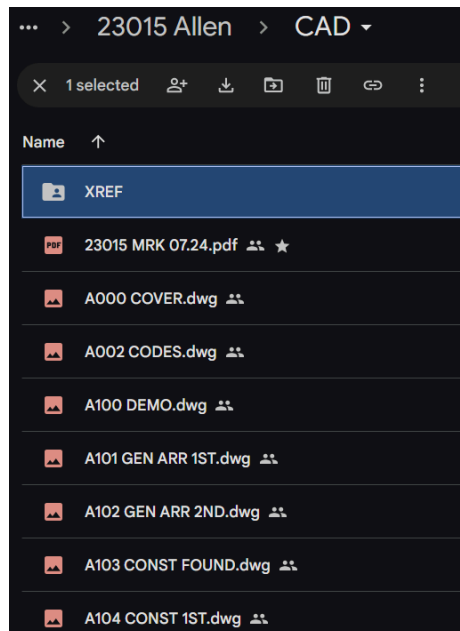
18. Visual *Package*

Updated 08.04.24

- a. This is a free form package where we develop ideas for our clients to make project related decisions. Feel free to use hand sketching, inspiration images, collages or any other method you feel will best communicate the design intent.
- b. **From CAD:**
 - i. **Draw your plan/elevation/whatever you need as per Template**
 - ii. **Use the WEB Page Setup (titleblock may not always be nec'y.) and place PDF in the Visual Folder**
 - iii. **Save CAD file in CAD/Xref as necessary**
 - iv. **Export PDF as .png's as necessary to use in visual package**
- c. **Use Google Slides Template**
- d. *Use InDesign Template (coming soon)*
- e. **From SketchUp**
 - i. **Check out our [Video Resources](#)**

19. Permit *Drawings*

- a. Our AutoCAD files simple and contain only a few layers by design.
- b. Use the Job Dashboard link to access all files.
- c. From CONSULTANTS










20. Purchasing Package

- Latest Set if not Permitted Drawings in PDF (*always required*)
- Structural
- Quick Cost at Initial Bid
- Approved Shopping List
- Delivery date - if it says, Wednesday or a single date - the start & finish are the same. Sometimes it says, "3-5 business days" so the start date would be 3 days and the end date would be the 5 days.
- And that's the 'Arrival Window' - English is stupid. We can open a window in our house and also use it to describe a gap in time.

10:11AM Wed Apr 16

24024 Carelli Ferguson Order

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3		Ferguson								Visual
4	 Amerock Monument 6-5/16 Inch Center to Center Handle Cabinet Pull Model: BP36572FB	Ferguson	https://w...	51	\$6.43	\$327.93			p5. Order as Approved	Visual
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p7. Schedule Delivery (See De...
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 x. Closed
 x Clear

0 0 0 0 0 0

- Approved Detail Design Drawings

21. Permit Services

- STEP Begin - Permit submittal date.
- STEP Complete - Permit approval date based on specific jurisdiction estimated review times. Always put the longest projected timeline from the city, plus 2 weeks.
- NEXT Task - Used for pre-application task and resubmittals.
- this date is sometimes in My Building Permit systems. If not, put this date on the following Monday - and every Monday we can not follow up by email with these reviewers.
 - This way this can be done before our Monday meeting. I would put you in Team: Next Task By for these jobs until the status' changes (we can look at those together if they don't make sense to you) at which point you can change Next Task by to Elijah. You can bill probably 15 minutes to each client in Permit Services each week.

STEP NAME	Status: MASTER	S... N...	DB LINK	Step: Notes	Step: BEGIN	Step: NEXT TASK DUE	Step: CUSTOMER DELIVER	Step: COMP...	Team: NEXT TASK BY	TEAM: Exterior	S E
Reviewer 1	0.34 In Review	VISL	Steph	Zoning Reviewer	03/11/25	04/01/25			E Elijah Gilmer	EL Eric Lenz	
Reviewer 2	0.34 In Review	VISL	Steph		03/11/25	04/01/25			E Elijah Gilmer		
Reviewer 3	0.34 In Review	VISL	Steph		03/11/25	04/01/25			E Elijah Gilmer		
Reviewer 4	0.34 In Review	VISL	Steph		03/11/25	04/01/25			E Elijah Gilmer		
Reviewer 5	0.34 In Review	VISL	Steph		03/11/25	04/01/25			E Elijah Gilmer		

Permit Services, Review 04.07..25

Every Monday prior to team meeting:

- keep your name on these reviewers. check the status on the system (Elijah said he showed you and if you come across a new one - ask him) -OR-
- 1a. email them direct a standard email, 'how's the permit review going? (we'll work on this)

Reviewer 4	0.34 In Review	VISL	Steph	For reference, your record number is. 7066340-CN-001.	03/11/25	04/07/25			S Sophia Daniluk		
Reviewer 5	0.34 In Review	VISL	Steph		03/11/25	04/07/25			S Sophia Daniluk		
STRUCTURAL	21 In Review - See Permit	VISL	Steph		10/31/24	04/07/25			F Frank Bua	JK Josh	

- If there's nothing new - push the date to the following Monday and keep your name.
- If there's something to Download or we received an email - change this to .35 (sometimes .33) keep date, change to Next Task to Elijah, Carl or Frank.

e. ELIJAH YOU CAN ADD HERE.

22. Construction Support

- Status?

PRODUCTION TEAM

1. General CAD Guidelines

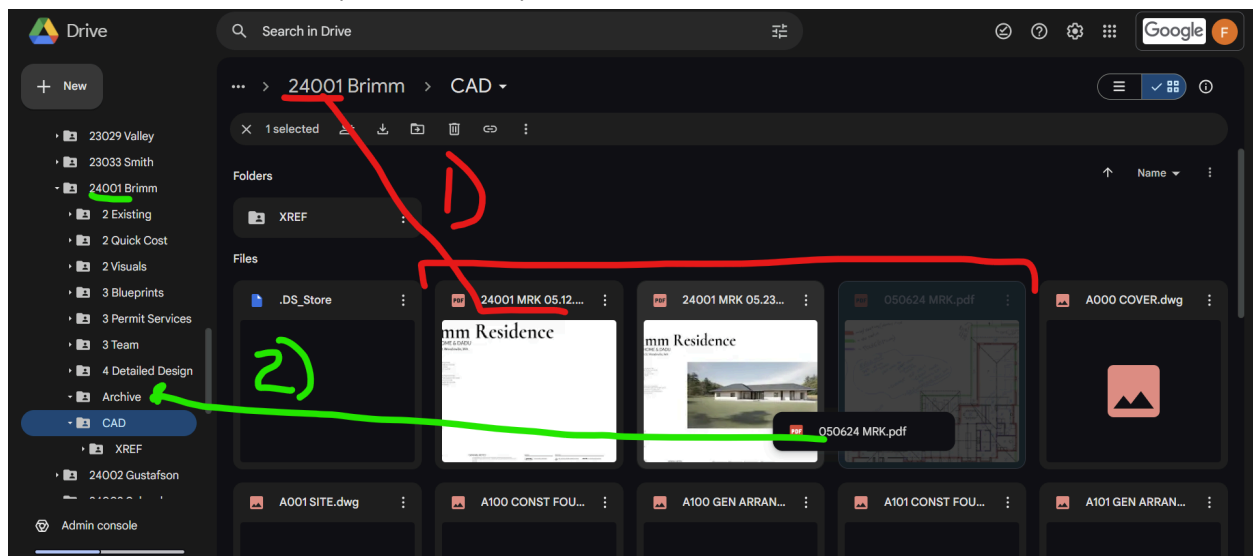
- Our Layer System is **View Dependant**, *not* Object Dependant
- So **Do NOT** add layers
- DO** Start all drawings at 0,0,0 coordinates
- Entry of the home **should always** face the bottom of the page, unless the plan simply won't fit
- Do NOT** add text or dimension styles
- DO** draw with closed polylines as much as possible
- DO** use Associative Hatches *unless* totally impossible
- XREF files contain graphics & Room Title text **only**
- PAGE SETUPS Contain dimensions, text & control visible layers of the XREF
- Layer Guide** - [HERE](#)

2. Starting A Job

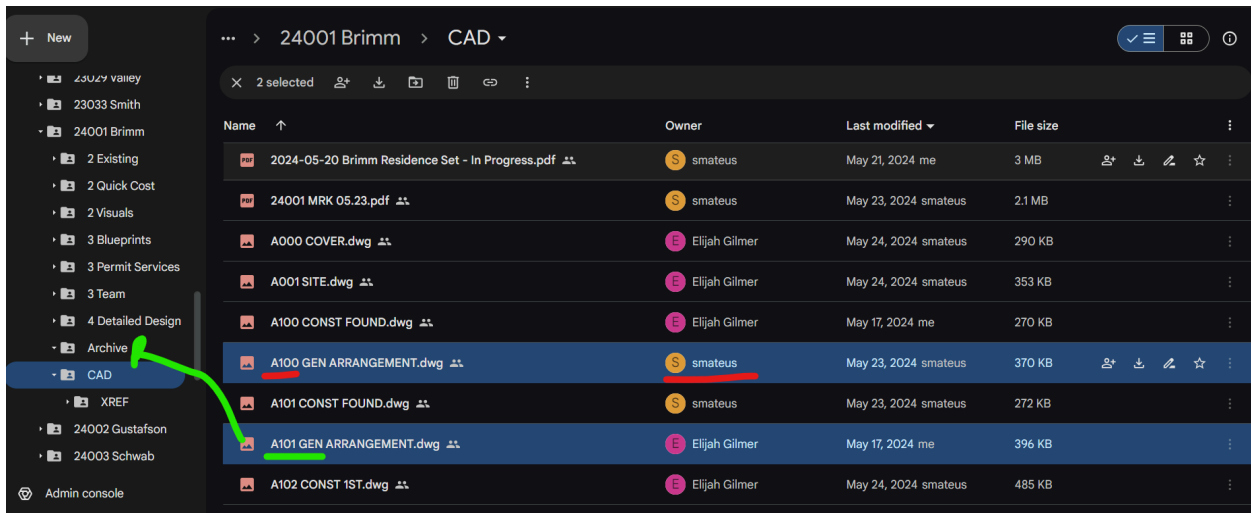
- Our Layer System is **View Dependant**, *not* Object Dependant
-

3. Best Practices: Markups

- Put PDF's of your latest work in the top level CAD folder, include Job No., Date & , 'MRK'
- Move completed Markups to the Archive Folder of that job.



- c. If you rename pages, keep the one you upload and move the previous to the Archive Folder

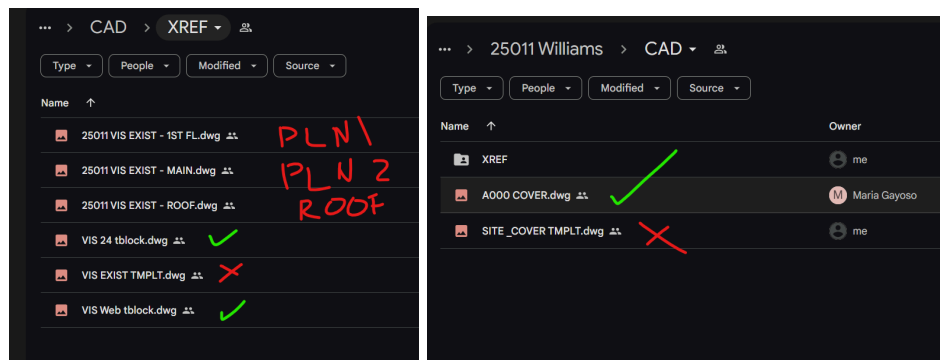


- d. **STATUS CHANGE:** .17 QA / Code Check OR .19 QA / Detail Check

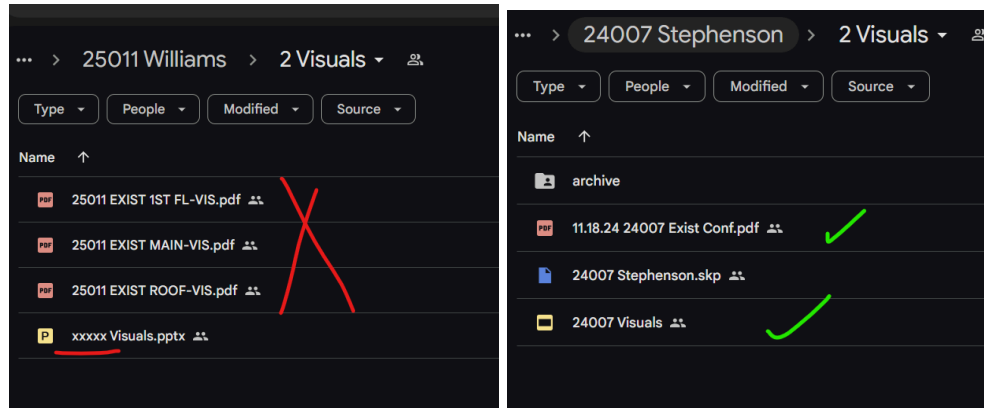
e.

4. Best Practices: *Markups*

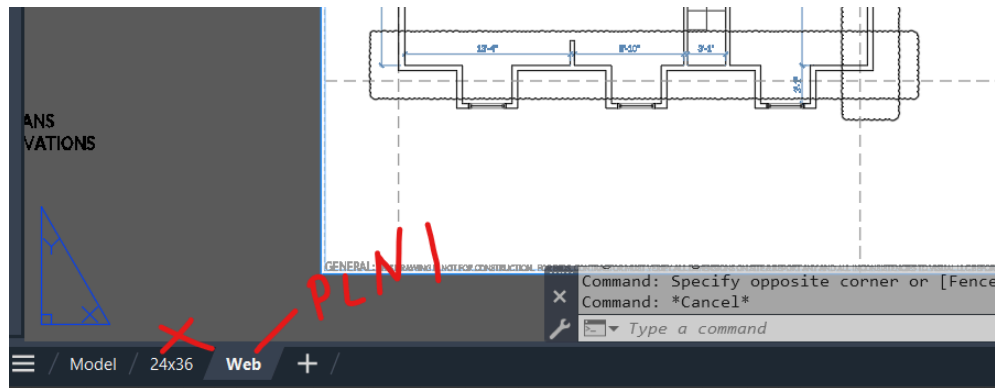
- a. Rename files in Google Drive before downloading to avoid confusion. Not sure which of these I would download to review.



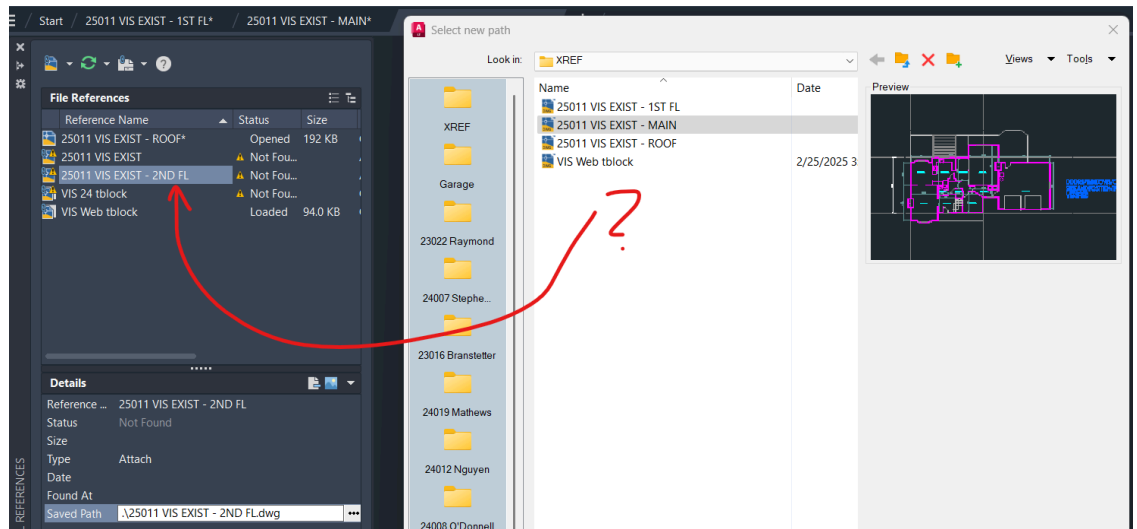
- b.
- c. When you export to PDF, make it one File using Publish Command, or Manually Combine files to a PDF Named "25011 Exist" You can rename the Visual Presentation as well. (see 24007 below right - eventually someone will take the PDF to markup on site)



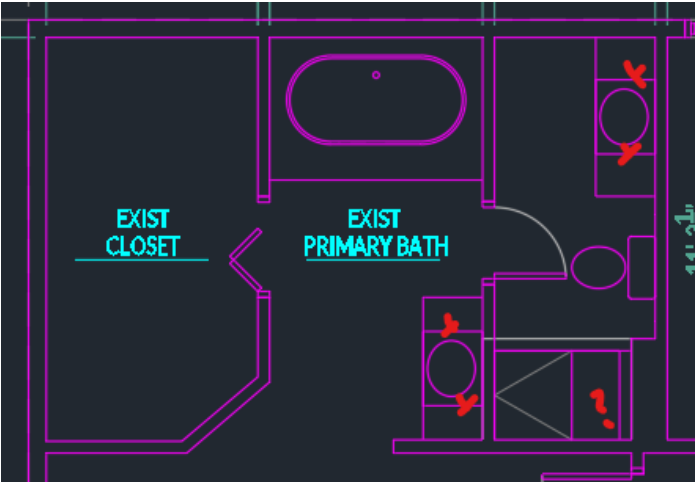
- d. In the XREF files - you can delete the 24x36 and rename WEB to PLN1, etc.



- e. Using the same names for every job helps avoid this:



- f. Also - detach or unload any non-used xref's. If you're using XREF's to check for alignments - that's super fantastic - however just make sure you know the difference between 'Attach' and 'Overlay' in the properties type.
- g. A lot of times - especially in existing conditions, the blocks are more 'starting points'. Feel free to explode *if you have to* , to make the graphics more accurate.



h.

24012 Engine File Edit View Insert Format Data Tools Extensions Help Visual Tools

100% \$ % .0 .00 123 Lato - 10 + B I A

Job #:

	B	C	D	E	F	G	H
	Job #:		LEGEND & RESEARCH	ADDRESS	PARCEL NUMBER	LOT No.	ZONE
First Name(s)		Mai Nguyen	Code Research - Fill out before Handoff	215 S 107th St Seattle	0795001955		R6
Type:	Custom Home		Unincorporated	Minimum Lot Width (K.C.C. 21A.12.030 R4-R48 Only)	MINIMUM	EXISTING	
Address:	215 S 107th St			LOT AREA		6,250.00	
City:	Seattle						
Phone:	832-228-0105						
Email:	mai.nguyen1987@gmail.com			Building Coverage (KCC 21A.06.130)	MAXIMUM	EXISTING	PROPOSED
				SFR - EXIST. PROP (NUMBERS)			

help Visual Tools

10 B I A

PARCEL NUMBER	LOT No.	ZONE	SDCI PROJECT #	Height (KCC 21A.18.060)	ACTUAL DATUM
0795001955		R6		T.O. EXIST REBAR CAP	425.55
MINIMUM	EXISTING			POINT A	428.25
	6,250.00			POINT B	426.75
				POINT C	429.12
				POINT D	430.12
MAXIMUM	EXISTING	PROPOSED	NEW TOTAL	AVG. GRADE	428.56
			0.00	MAX HEIGHT (+25)	453.56
			0.00		
			0.00		

Selections

Pick Mode

- Select...
- Select...
- By Category
- By Location

Modifying window schedule

25014 Engine

File Edit View Insert Format Data Tools Extensions Help Visual Tools

Sort sheet Sort range

Windows Range: A

Location	Item
21	Garage Door(s)
22	Garage Opener
27	Garage Picture
28	Garage Single Hung
29	Garage Skylight
30	Garage Entry Door
31	Garage Manufacturer

Change view

- Appliance
- Bath Hardware
- Cabinetry
- Closet Shelving
- Concrete Flatwork
- Contractor
- Countertop
- Door & Millwork
- Drywall
- Flooring
- View more
- Exit view

- Foundation
- Lighting Fixtures
- Lumber
- Mirrors & Shower Doors
- Paint
- Plumbing
- Railings
- Roofing
- Siding
- Tile
- Windows

City Guidelines Zoning Selections Snapshot Window Window Schedule MH Heating MH Energy MH

ENGINEERS & CONSULTANTS

1. Engineers & Consultants

Use column: **Status: PERMIT DRAWINGS**

STEP NAME	Job Num...	DB LINK	Status: MASTER	Step: Notes	Step: BEGIN	Step: NEXT TASK DUE	Team: NEXT TASK BY	TEAM: Exterior	Status: PERMIT DRAWINGS
Job Number 24013									
22	PERMIT DRAWINGS	24013	Zable	19 QA / Detail Check	02/11/25	04/08/25	Frank Bua		19 QA / Detail Check
23	Structural Engineer	24013	Zable	04/04 Update: Structural engineer onboarding is in progress, awaiting their target completion date.	03/24/25	04/08/25	Frank Bua	Josh Krumm	04/08/25
24	JRNL	24013	Zable	09 QA / Constraint Check	09/25/24	04/09/25	Frank Bua		20 Submit - See Permit Services
25	EXIST CONSTRAINT	24013	Zable	15 Prepare for Permit	09/16/24	04/28/25	Frank Bua		21 In Review - See Permit Services
26	VISUALS	24013	Zable	14 Client Approved	09/25/24		Frank Bua		22 Revise per Review - See Permit Serv
Job Number 24017									
Job Number 24018									

a. --Consultant Onboard--

.91 Send Consultant Package

Send a link to the Visual Package to the person in **Team: Exterior** and Change **Step: NEXT TASK DUE** 2-3 days out.

Dear [Assessor's Name],

I hope this message finds you well. We are currently working on the [Project Type or Name] for [Client Name], located at [Project Address].

The project is currently in the [Project Status] phase, and we are now looking to move forward with [Service Type] to ensure the project proceeds smoothly.

We'd appreciate it if you could provide us with the following:

- _____ Services
- Estimated Timeline
- Pricing

Attached you'll find the documentation you may need, including [package, details, etc] for your reference.

Please let us know if you need any additional information or if you have any questions. We'd appreciate receiving your input by [Preferred Date or Deadline], if possible.

Thanks!

Maria
visual

.92 Proposal Issued (Consultant)

Save copy of the proposal in the Google Drive folder
Change **Team: NEXT TASK BY** to a Manager. After a quick look or answer of any questions, it will eventually get changed back to your name.

.93 Proposal to Client (Consultant)

1. Send 'warmup' email to Client letting them know they will receive a proposal for "x" services for an estimated amount.

Subject: 24019 Project Proposal
Hi Mai,

I hope you're doing well. I wanted to update you regarding the project. The structural team, led by Josh Krumm from ProStruct Engineering, will be sending over a link shortly with a document detailing the proposal for the next steps. This will allow you to review everything carefully.

If you have any questions or need further clarification, we're all available and happy to assist you.

Best regards,
Sofia
visual

2. Follow up for payment confirmation, change date as necessary.
3. Upon payment confirmation, you may have to update the **Team: Exterior** to the person assigned to our project.

.94 Proposal Approved / Send Base Files

1. Change **Team: NEXT TASK BY** to a Manager.
2. Change **Step: NEXT TASK DUE** 2-3 days out.
3. **PRODUCTION TEAM:**
 - a. Bind XREF's or compile the latest workable drawing files into the consultants dedicated folder.
 - i. All Demo, Construction Plans, Elevations & Section Page Setups
 - b. If for Permit, make PDF

- i. Site Plan, All General, Demo, Construction Plans, Elevations, Sections, and Detail Pages.
- c. Send the Dashboard link to **Team: Exterior**

The screenshot displays a software interface with a table of tasks and a file explorer below it. Red annotations highlight specific elements:

- A red circle highlights the text **Structural Engineer** in the 'STEP NAME' column of the table.
- A red circle highlights the text **Structural** in the breadcrumb navigation.
- A red arrow points from the 'Structural Engineer' circle to the user **Lokesh** in the 'TEAM: Exterior' column of the table.

STEP NAME	Job Num...	DB LINK	Status: MASTER	Step: Notes	Step: BEGIN	Step: NEXT TASK DUE	Team: NEXT TASK BY	TEAM: Exterior	Status: PERMIT DRAWINGS
23 Structural Engineer	24013	Zable	93 Proposal to Client (Consultant)	04/04 Update: Structural engineer onboarding is in progress, awaiting their target completion date.	03/24/25	04/08/25	Frank Bua	Lokesh	93 Proposal Approval
24 JRNIL	24013	Zable	09 QA / Constraint Check		09/25/24	04/09/25	Frank Bua		

The file explorer below shows a list of files:

Name	Owner	Last modified	File size
A100 DEMO.dwg	Maria Gayoso	10:18 AM	830 KB
A102 CONST PLANS.dwg	Maria Gayoso	10:18 AM	930 KB
A200 ELV.dwg	Maria Gayoso	10:18 AM	789 KB

4. Change **Step: NEXT TASK DUE** with the consultants turn around or preferably a week before for a follow up.
5. Change **Status: PERMIT DRAWINGS** to **.16 Initial Draft in Progress** and follow the [Permit Drawing Process](#):

PERMIT SERVICES

1. Permit *Services*

- .26 Pre-App Research
- .27 Formwork
- .28 Submit for Pre-App Meeting
- .29 Pre-App Review
- .30 Pre-App Meeting
- .31 Submit
- .32 Intake Review
- .33 Intake Comments
- 0.34 In Review
- .35 Review Revisions
- .36 QA / Response Letter
- .37 Re Submit
- .38 Permit Approved
- .39 Permit Issued
- .40 Revise, Post Approval
- .41 QA Post Approval
- .42 Re Submit, Post Approval

2. Energy *Credits*

- Install **visual** fonts & plot style from the [Install First Folder](#) before you begin.
- You will be given access to a Job Folder with subfolders already created. If you are having access issues, please contact **visual** immediately. Download this folder to your device. [Sample Job Folder Setup](#)

3. USE THIS TO AS A SUPERVISOR REQUEST TEMPLATE:

" Suggested Email Wording:

Subject: Quick Clarification Request — Permit #BLD2024-1220

Hi [Reviewer's Name],

Thanks for your comments on our permit application for the detached garage at 7828 201st St SW (BLD2024-1220).

I have a brief question regarding one of your comments ([briefly mention the specific item, e.g., stormwater drainage, footing drain issue, etc.]) to ensure we fully understand your intent and requirements:

[Insert short, clear question here.]

If this is something you're unable to clarify directly, or if you think it might be easier to discuss, I'd greatly appreciate the chance to schedule an informal resolution meeting or phone call. If that's the case, please let me know your preference for availability.

Thanks very much for your time—I really appreciate it.

Warm regards,
[Your Name]
[Your Contact Information]"