convergint

The purpose of this form is to provide a clear & simple guideline to ensure we are invoicing correctly. All details below are gathered from our previously negotiated payment terms found in our contract, or customer issued Purchase Order. This is not a contract or authorization to proceed with any work.

Company Name: Challenge to Excellence Charter School

Date: 03/27/24

Customer Representative: Katie Novak

Site Address:

16995 Carlson Dr, Parker, CO 80134

Bill To Address:

Same as site address

Person Authorized to Negotiate & Approve Terms

Name: Liz Dougan

Email Address: edougan@c2e.org

Phone Number: 303-841-9816

Person Authorized to Process Invoices

Name: Amy Clarke

Email Address: amclarke@c2e.org

Phone Number: 303-841-9816

Payment Terms (from date of Convergint invoice): 30

Contract Execution – Payment requested at the beginning of the project to order equipment, and/or labor, and/or prepare submittal packages (%): 50

Material Storage Plan and/or Stored Material Billing Requirements:

TBD

What day of the month do you prefer receiving monthly progress invoices? any

How do you prefer to receive invoices?

- [x] Email:
- [ ] Portal:

- AP Contact Name: Amy Clarke
- AP Contact Email: amclarke@c2e.org
- AP Contact Phone: 303-841-9816

What information is required on the invoice?

- [x] PO Number
- [ ] Contract Number
- [ ] Job Number
- [x] Other no sales tax included

What additional paperwork is required to process invoices?

- ☐ Lien Waiver – Interim/Final
- ☐ Pay Application
- ☑ W9
- ☐ CIP Reports
- ☐ Sales and/or Use Tax Letter
- ☐ Schedule of Values
- ☐ Prevailing Wage Reports (Attach Determination)
- ☑ Other no sales tax included

Is a custom SOV required? Please specify and provide any details:

No

Comments:

See attached tax exempt certificate.

Convergint Account Executive: Michael Nagy

Profisee Records (Internal Convergint Use):

Bill To (Profisee ID): _______________
Site (Profisee ID): _______________