

NVENT - ESTIMATING PREREQUISITES FORM

(Standard 4 weeks—pre-approval required for shorter turn-around schedules)

Quote Number:

Due Date:

Project Name:

Project Location:

Title	Company	Name	Telephone Number
Sales (1)	NTM		
Sales (2)	NTM		
Site rep			
Engineers rep			
Constructors rep			

Project Influencers	Discipline	Company	Key Decision Maker?		PTM Sales Contact
Contract Administrator					
Contact name 1					Tel:
			Yes	No	
Contact name 2					Tel:
			Yes	No	
Engineering Influence					
Contact name 1					Tel:
			Yes	No	
Contact name 2					Tel:
			Yes	No	
General Contractor					
Contact name 1					Tel:
			Yes	No	
Contact name 2					Tel:
			Yes	No	
Specialty Subcontractor(s)					
Contact name 1					Tel:
			Yes	No	
Contact name 2					Tel:
			Yes	No	
Contact name 3					Tel:
			Yes	No	

Contact name 4

Tel:

Yes

No

Tel:

Yes

No

Tel:

Yes

No

Documents needed for lump sum proposal			
Drawings and Lists		Specifications	General
Instrument list	Piping plans	Electrical specs	Project scope
Line list	Plot plans	General specs	Commercial terms and conditions
Equipment list	P&ID	Support specs	Safety requirements
Isometrics	Tank dimensions		Union contract (if applicable)
	Equipment drawings		

(Line list with LENGTHS, ISOs, or complete plan drawings are REQUIRED)

I. Customer Information Provided

Isometrics	Yes	No
Plan drawings	Yes	No
P & IDs	Yes	No
Instrumentation drawings	Yes	No
Equipment / sessel drawings	Yes	No
Other drawings	Yes	No
ET / ST specifications	Yes	No
Insulation specifications	Yes	No
Electrical specifications	Yes	No
Control systems specifications	Yes	No
Other specifications	Yes	No
Document list	Yes	No
Traced line list	Yes	No
Equipment list	Yes	No
Instrument list	Yes	No
Is information available electronically?	Yes	No

II. Scope of Work

Engineering	Yes	No
Heat trace material	Yes	No
Heat trace installation	Yes	No
Secondary power installation (define below)	Yes	No
Insulation of traced pipe	Yes	No
Pipe / equipment insulation only (define below)	Yes	No
Tubing bundle (power only)	Yes	No
Tubing bundle supply	Yes	No
Tubing Bundle install	Yes	No
Enclosures supply	Yes	No
Enclosures install	Yes	No

III. Miscellaneous

Union	Yes	No
Local #		

IV. Additional Comments

DESIGN PARAMETERS

Environmental Conditions

Ambient temperatures	Indoors	Outdoors
Minimum temperature °F:		
Maximum temperature °F:		

Area Classification

Nonhazardous	Yes	No		
Hazardous	Class		Division	Group
Hazardous	Class		Division	Group

(See area classification drawing or line list for area classification of each line)

Hazardous class	T-rating (°F)	or AIT (°F)	T rating or AIT must be specified
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Process Parameters

Min. operating temperature °F:	Max operating temperature °F:		
Max. exposure temperature °F:	Steam out	Yes	No

(See line list if the above parameters are different for various lines.)

Heat Tracing Parameters

Process maintain temperature °F:	(See line list if not shown here)
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Freeze protection temperature °F:

Insulation type:

Insulation Thickness for Lines and Tanks

Pipe sizes (0 -)	(If not shown here, see line list)
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Pipe sizes (-)

Tanks

Pipe support type:	Pipe support span in feet
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Heater cable operating voltage:	(120 V, 120/208 V, 120V/240 V or 277 V)
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Heater cable type specified	See heat tracing specification
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Tanks:	Material	
	Dimensions	Submit tank dimensions

Instruments:	Enclosures	Submit instrument list
	Thermostats	

Tube bundle required	Submit specifications
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Control/Monitoring/Alarm

Type of Controls	Yes	No
Freeze protection		
Process maintain		
Thermostats		
RTD		
Enclosure		NEMA 1, 12, 3R, 4, 4X, 7 or Z-purge
If yes, enclosure type:		

Power Distribution Parameters

Customer supply voltage:

Tracer/Alliance to Provide

Power distribution	Primary (MCC to EHT transformer) and or Secondary (EHT panel to P/C)
Conduit or cable tray	Type of conduit (RGS, alum, Robroy etc.)

Engineering Deliverables

Heat Tracing	Yes	No		Yes	No
Engineering calcs			EHT isometric details		
Electrical heat trace schedule			Controller set points (config.)		
Instrument HT schedule			EHT components tag schedule		
Electrical					
One line diagram			EHT equipment layout		
Panelboard schedule			Control panel schematics		
Cable schedule			Control panel layout/BOM		
Installation details			Control panel interconnects		
Power location plan or			Equipment nameplate schedule		
Conduit/tray routing plan					
Documents					
As-builts					
Operating manual					
Panel testing reports					



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