

Module 1: Bid and File Management

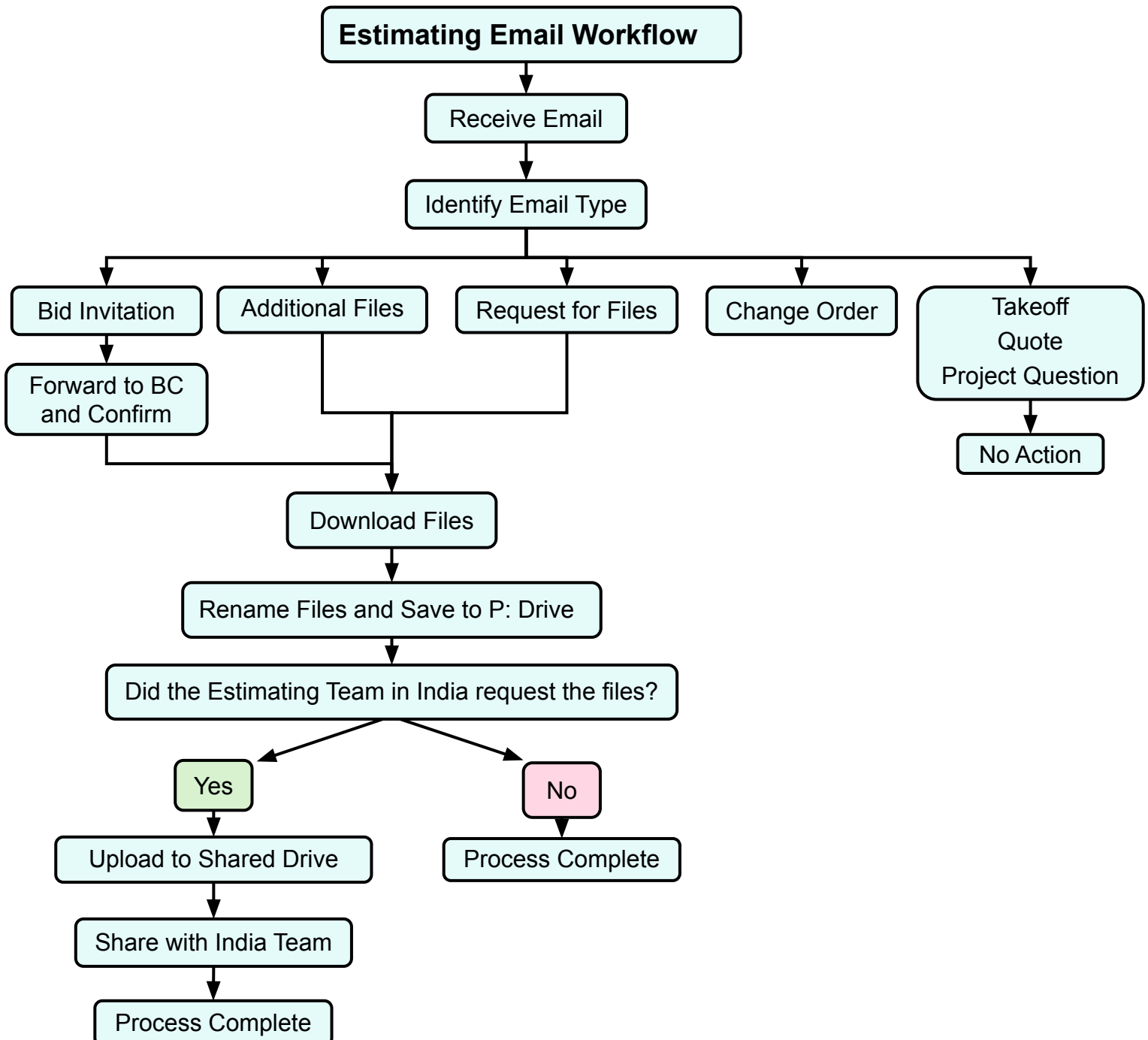
Purpose: Manage bid invites, emails, and project plans.

Objective:

- ✓ Analyze and process estimating emails
- ✓ Add or confirm bid invitations
- ✓ Download and organize project plans

Topic Covered

1. Intro to BuildingConnected
2. Managing estimating emails
3. Forwarding email invites
4. Manually creating invites
5. Naming project plans
6. Sharing project plans



Module 1.1: Introduction to BuildingConnected (BC)

Purpose: Navigate the bid board and download project plans from BC.

Calendar View in BuildingConnected

The screenshot shows the 'Bid Board' interface with the 'Calendar' tab selected. The top navigation bar includes 'Bid Board', 'Plan Room', 'Calendar', 'Leaderboard', and 'Analytics'. A 'Find' search bar and a '+ Bid Invite' button are visible. A callout box points to the '+ Bid Invite' button with the text: "Select 'Bid Invite' to manually add an invitation". Another callout points to a project entry in the calendar with the text: "Click 'Project Title' to open a pop-up displaying key project details". A third callout points to the 'Event type' filter section, which has 'Bids due' selected, with the text: "Event type: 'Bids Due' only". The calendar shows events for 'Project A', 'Project B', 'Project C', 'Project D', and 'Project E'.

Bid Invitation Pop-up

The screenshot shows a pop-up window titled "Bids due 2/2/2026 12:00 PM PST". It displays details for "ABC Project" with a value of "\$357,800" and "2 clients | Company A". A callout box points to the "ABC Project" title with the text: "Click 'Project Title' in the pop-up screen to view the entire invitation". Below this, there is a "Grouped events" section with two entries for "ABC Project" with dates and times. A "Comments" section at the bottom shows a comment from "Stacie Willey" stating "Addendum 4 downloaded." A callout box points to the "Comments" section with the text: "Track downloads and addenda in 'Comments'".

Where to Find Plans

The screenshot shows a project overview for "ABC Project" under "Company A". It features tabs for "Overview", "Files", "Messages", and "Bid Form". A callout box points to the "Overview", "Files", and "Messages" tabs with the text: "Locate plans in the 'Overview, Files, or Messages' tabs".









Module 1.2: Managing Estimating Emails

How to Use: Use the keywords and sender information to determine the corresponding action.

 **Review**

 **Action**

 **No Action**

Email Type	Look For Keywords	Sender	Types of Action
Bid Invitation from BC	Request for Proposal (RFP)	Customer	Confirm Invitation 
Bid Invitation from Customers	Quote, Estimate, Date	Customer, Estimator	Forward and Confirm Invitation or Manually Enter It 
Additional Files	Addenda, New Drawings	Customer, Estimator	Download Project Files 
Request for Files	You've been assigned	Estimating India	Share Files 
Change Order (CO)	Job # CO, CN	Detailer, PM	Prepare a Change Order (CO) 
Takeoff	E26-014-00	Estimator	No Action (Reference Only) 
Quote	Quote	Estimator	No Action (Reference Only) 
Project Question	Questions	Estimator, Customer	No Action (Reference Only) 

Module 1.3: Forwarding Bid Invitations to BuildingConnected

Use this process when: A customer sends a bid invitation via email.

Steps

1. Forward the email invitation to BC
2. Add invitation to the '**Bid List**' (regular customers)
3. Confirm invitation on BC
4. Rename invitation to match plans

Regular Customers (Forward and record invitation details on the Bid List)	
Company A	Company F
Company B	Company G
Company C	Company H
Company D	Company I
Company E	Company J

Module 1.4: Manually Entering Invitation in BC

Use this process when: The invitation does not appear on BuildingConnected.

Steps

1. Select '**+ Bid Invite**' on BC
2. Add project details
3. Confirm invitation
4. Rename invitation to match plans

Manual Bid Invitation

Add new bid invite ×

Hit the 'N' key anywhere in Bid Board to add new opportunities

ABC Project
Cedarcrest Middle School

Client contact
PR Customer A ⊗

⊕ Add another client

Due date
Feb 2, 2026 ▼ 12:00 PM

Customers to Manually Enter in BC

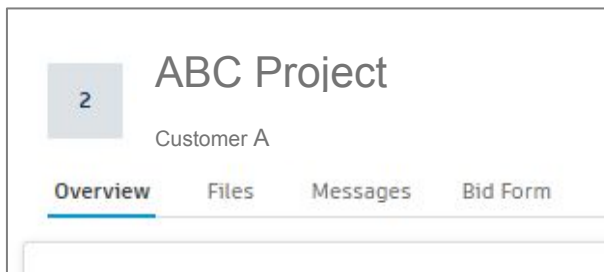
Customer Name – Company A
Customer Name – Company B
Customer Name – Company C
Customer Name – Company D
Customer Name – Company E

Module 1.5: Downloading Project Files

Purpose: Download project files from BuildingConnected (BC) or other sharing platforms.

Steps

1. Open project invitation in BC
2. Locate the files
3. Download the files
4. Drag the files to the desktop



Locate the plans in the '**Overview, Files, or Messages**' tabs




Module 1.6: Renaming and Organizing Project Files

Purpose: Rename the files and create a project folder.

Steps

1. Rename the files in the downloaded folder
2. Create a new folder on the P: Drive
3. Drag the files into the project folder

Naming Protocol: [Job Initials] – [Discipline] – [YY.MMDD] – [Plan Phase/Revision]

Example:  SBA - Plumb - 25.1022 - Not For Const Set

Module 1.6: Renaming and Organizing Project Files

Purpose: Use the naming protocol when renaming and saving project files.

Naming Protocol: [Job Initials] – [Discipline] – [YY.MMDD] – [Plan Phase/Revision]

Explanation

Disciplines – Areas of Design		
Discipline	Abbreviations	Example
Complete Set	N/A	ABC – 25.1205 – 90 CD Set
Architectural	Arch	ABC – Arch – 25.1205 – 90 CD Set
Electrical	Elect	ABC – Elect – 25.1205 – 90 CD Set
Structural	Struct	ABC – Struct – 25.1205 – 90 CD Set
Civil	Civil	ABC – Civil – 25.1205 – 90 CD Set
Heating, Ventilation, Air Conditioning	HVAC	ABC – HVAC – 25.1205 – 90 CD Set
Plumbing	Plumb	ABC – Plumb – 25.1205 – 90 CD Set
Shoring	Shore	ABC – Shore – 25.1205 – 90 CD Set
Landscape	Land	ABC – Land – 25.1205 – 90 CD Set
Building Envelope	BE	ABC – BE – 25.1205 – 90 CD Set

Plan Phase	Plan Revisions (Abbreviations)
Concept or Design	<ul style="list-style-type: none"> Schematic Design (SD) or Design Development (DD)* *DD sets often include the percentage completed Ex. 30 DD Set
Pricing and Permit Phase	<ul style="list-style-type: none"> Guaranteed Maximum Price Set (GMP) or Permit Set
Bid Set	<ul style="list-style-type: none"> Bid Set
Construction Documents	<ul style="list-style-type: none"> Construction Documents (CD)* or Issued for Construction (IFC) *CD sets often include the percentage completed Ex. 90 CD Set
Revised During Construction	<ul style="list-style-type: none"> Addenda (Add) or Correction Sets (Corr)

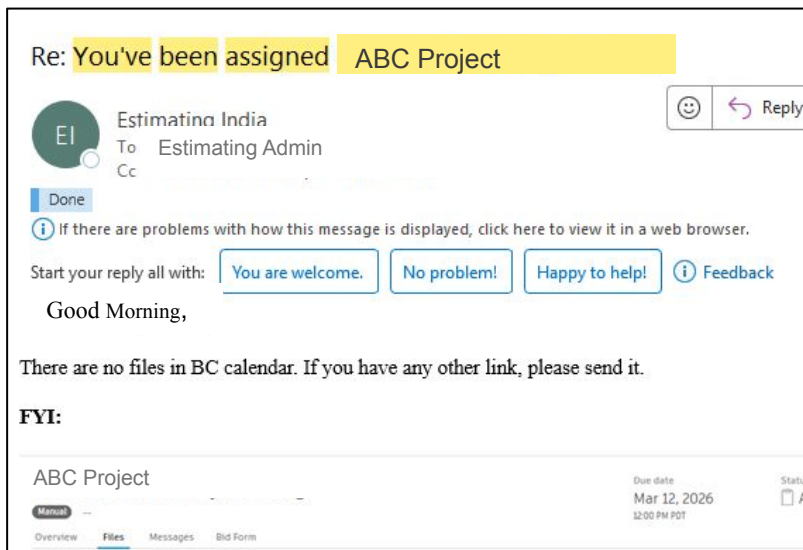
Module 1.7: Sharing Files with the India Team

Purpose: Upload project files to Shared Drive and share them with the team in India.

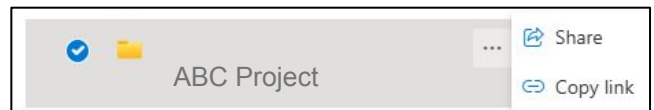
Steps

1. Open the shared drive
2. Open the estimating folder
3. Create a new folder
4. Upload project folder from P: Drive

Example Email Requesting Files



Project Folder Shared Drive



Right-click, '**Copy Link**' and Paste into an email to the India Team

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