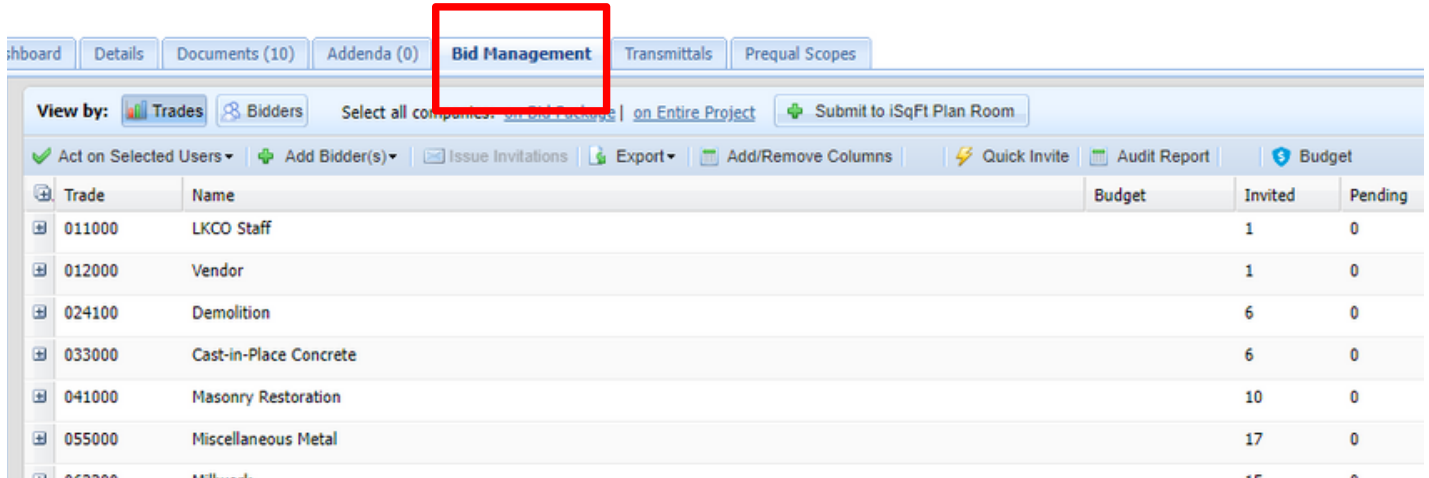# Module 12
Navigate Bid Management Tab
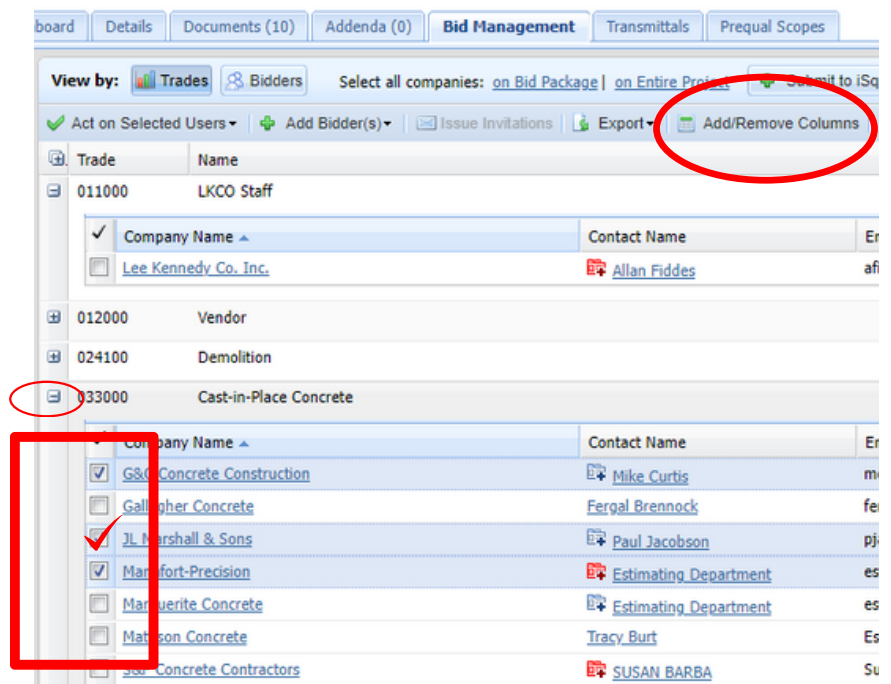
1- Editing Columns in Bid View

- **Click on the "Bid Management" tab**

2- Editing Columns in Bid View

- **Click on the "+" next to the trade name**

- **Select the names of the company you'd like to view and click "Add/ Remove Columns"**

Module 12:
Navigate Bid Management Tab

3- Editing Columns in Bid View

- **A new window will open. Add and remove columns using the arrows in the center of the window.**

- **Click "Apply"**

*NOTE

- **Click the double-arrow on the far left hand side of the screen to filter the sublist through selected parameters**

Module 12:
Navigate Bid Management Tab

1- Changing Bid Packages and Filter Options

- **Click the double-arrow on the far left-hand side of the screen**

- **Use the dropdown arrow under "Bid Packages" to edit**

- **Click "Apply"**

*NOTE

- **To remove the "Won't Bid" filter from your view, scroll down to "Bid Status/ Awarded"**

- **Click "Won't Bid" (the words will highlight)**

- **Click "Apply"**
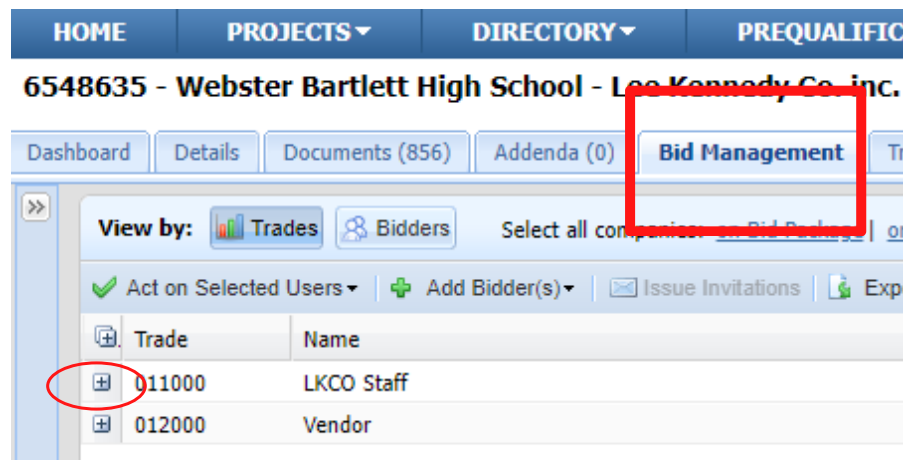
Module 12:
Navigate Bid Management Tab

1- Call Notes

- **Click on the "Bid Management" tab**

- **Click on the "+" sign left of the project name**

2- Call Notes

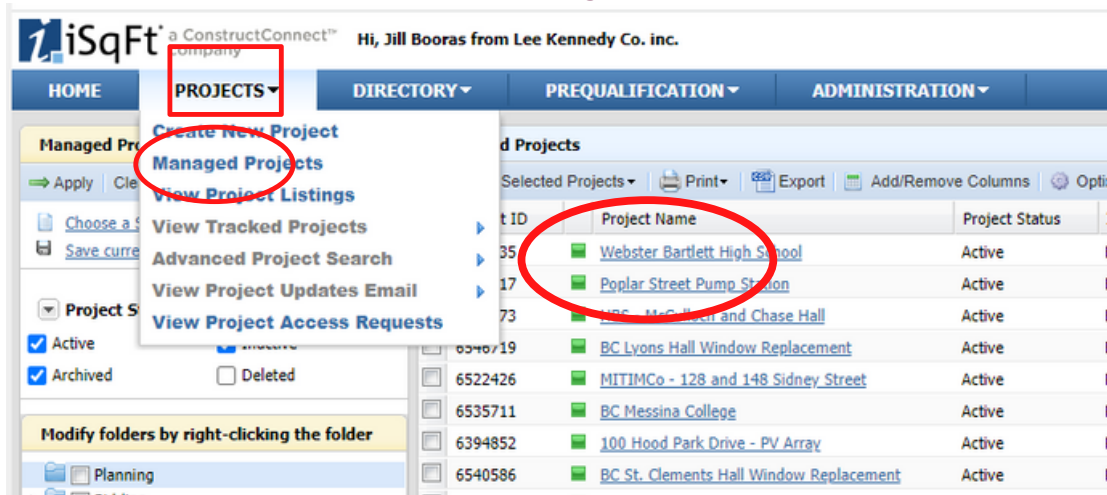- **Click on the "Call Notes" to the far left of the project name**

Module 12:
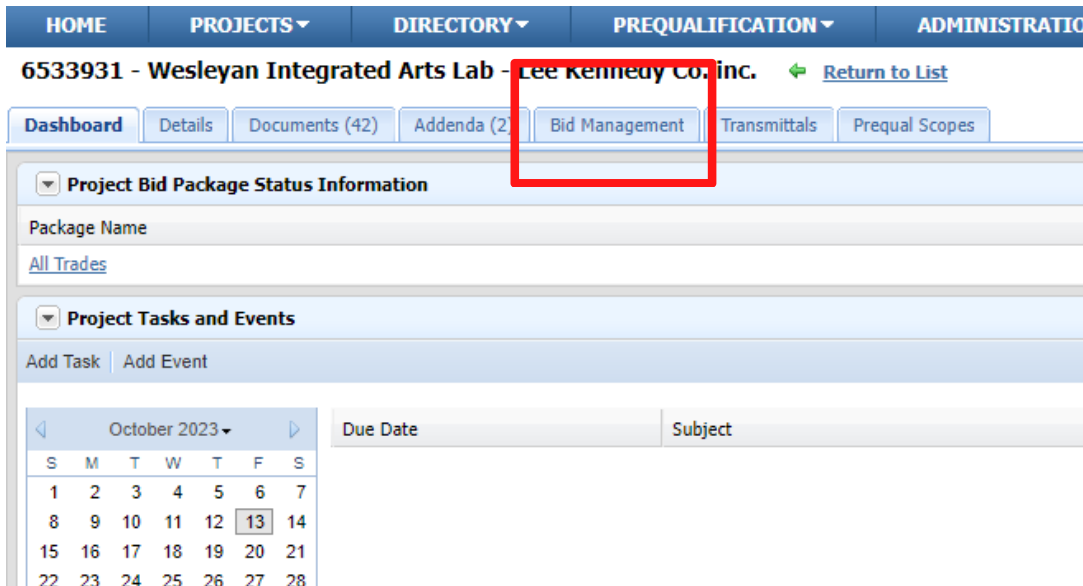# Navigate Bid Management Tab

1- Making Calls/ Updating iSqFt

- **Click on the "Projects Tab"**
- **Click on "Managed Projects"**
- **Click on the name of the project**

2- Making Calls/ Updating iSqFt

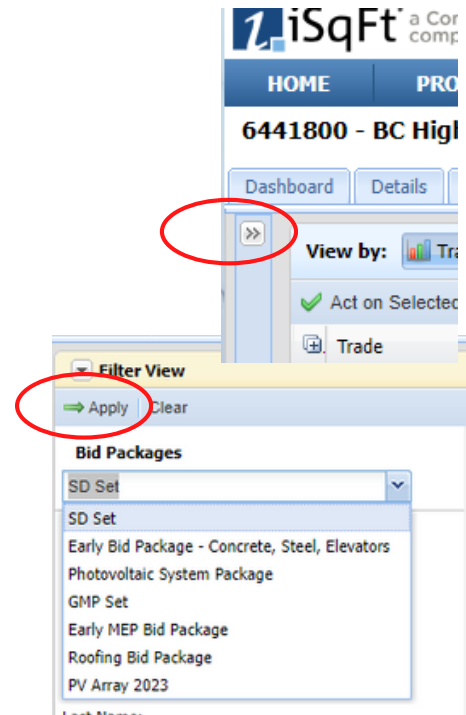- **Click on the "Bid Management" tab**

Module 12:
Navigate Bid Management Tab

3- Making Calls/ Updating iSqFt

- **Click on the arrows (>>) on the top left-hand side of the screen**

- **Under "Bid Packages" click on the dropdown menu to choose the most recent package.**

- **Click "Apply"**

4- Making Calls/ Updating iSqFt

- **Click on the "+" sign left of the trade name**

⊞	012000	Vendor
⊞	024100	Demolition
⊞	030000	Concrete
⊞	040000	Masonry
⊞	051000	Structural Steel Framing
⊞	055000	Miscellaneous Metal
⊞	062200	Millwork
⊞	071000	Dampproofing and Waterproofing

Module 12:
Navigate Bid Management Tab

5- Making Calls/ Updating iSqFt

- **Click on the icon below "Call Notes"**

- **Click on the name next to "Invited Contact"**

*The page will pop out to a directory for the sub

Module 12:
Navigate Bid Management Tab

6- Making Calls/ Updating iSqFt

- **When emailing subs, follow the templates from the L: Drive**

📁 > Network > fs1 > Estimating > LKCO - PROJECTS > Estimate Templates
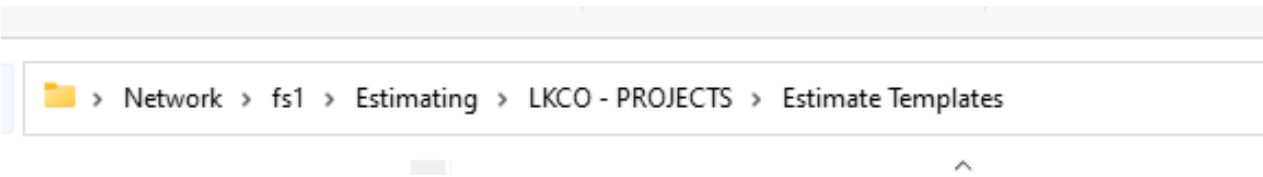
- **When making calls for subs that have not been marked as "Accepted Invite" or "Declined Invite", use the following language via phone call:**
  - *"Hi this is _____ from Lee Kennedy. I am calling to follow up and see if you decided whether you will bid on _____"*

Module 12:
Navigate Bid Management Tab

7- Making Calls/ Updating iSqFt

- **When updating the call notes, be sure to include:**
  - **Who was contacted**
  - **When they were contacted**
  - **Summary of the conversation, including all relevant information**

8- Making Calls/ Updating iSqFt

- **To save, click on "Add Note"**

*Continue this process for each sub invited on a project

Module 12:
Navigate Bid Management Tab

Call Note Status

- **Contacted**: Use whenever you have sent an email to the sub. Please note to whom you sent the email

- **Left Message**: Use when you have left a voicemail for a sub. Please note who the message was left for in the call notes.

- **Accepted Invite**: Use when you have confirmation that the sub will bid on the project. Please note whom you spoke to.

- **Declined Invite**: Use when you have confirmation that the sub will not bid on the project. Please note who you spoke to.

- **Undecided**: Use when you are unsure if a sub will be bidding, or if they are still reviewing the project. Please note who you spoke to.

- **Resent**: Use when you have resent the ITB to the sub. Please mark in the call notes who the ITB was resent to for future contact.

Module 12:
Navigate Bid Management Tab

Call Note Status (Continued),

- **Bid Received**: Use only when we have received a proposal/scope sheet from the sub. Please mention who sent the proposal and the date it was received. Ex: "Received proposal from John (9/22).
  - If the sub has accepted the invite for more than one trade, please note what trade the proposal corresponds to. Ex: "Received proposal for ACT from John (9/22)".

- **Walkthrough**: Use when you have confirmation that the sub will be attending the walkthrough.

- **No Answer**: Use if you are unable to get ahold of someone when calling and you are unable to leave a voicemail.

- **Bad Phone Number**: Use if the phone number listed in ISqFt is not in service. Please send an email to the contact if this is the case. In the email, please ask for an updated phone number.

*The call notes are important for Preconstruction to know what contact has been made with the subs and who we have been talking to from each company regarding the project.