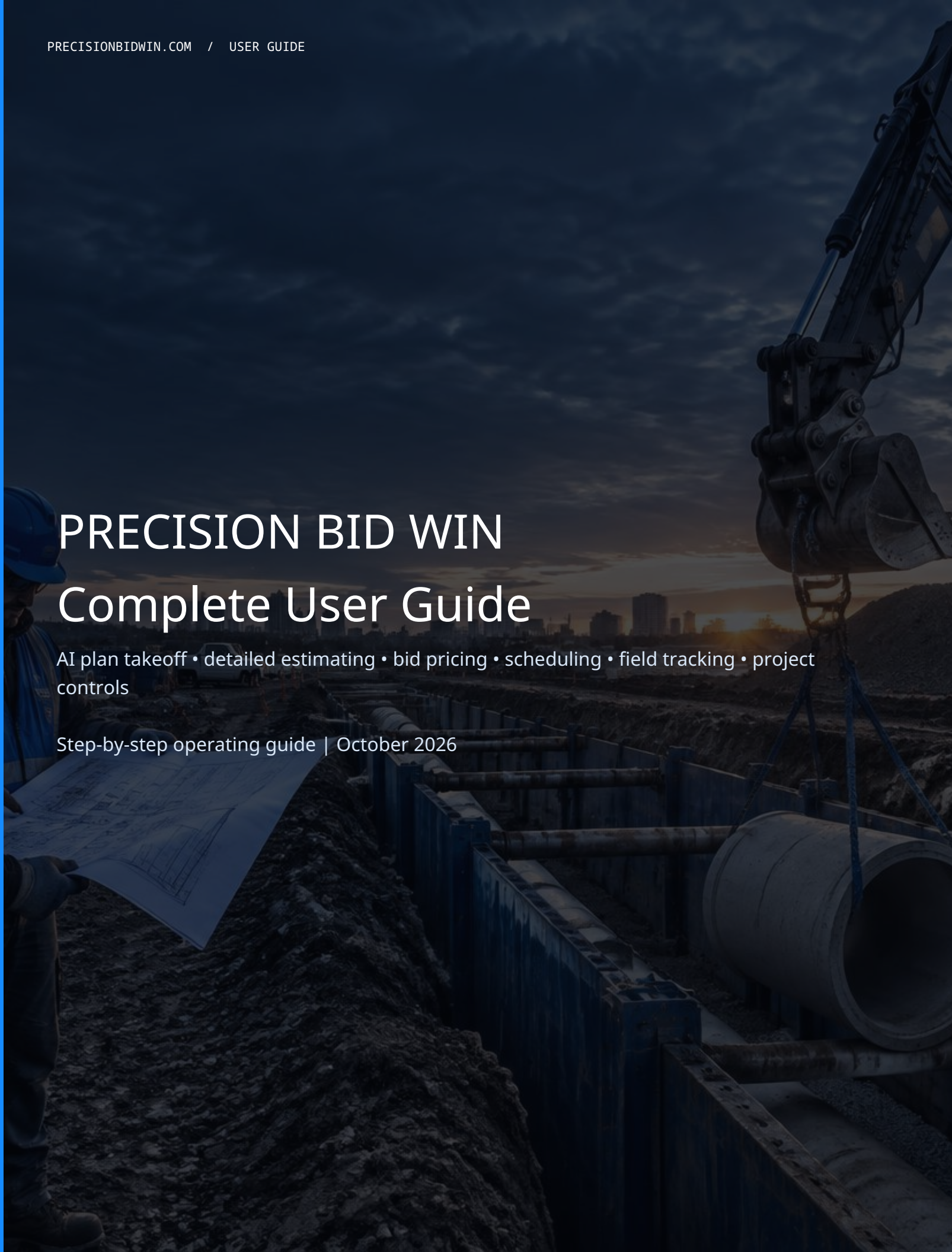


PRECISION BID WIN
Complete User Guide

AI plan takeoff • detailed estimating • bid pricing • scheduling • field tracking • project controls

Step-by-step operating guide | October 2026

READ THIS FIRST

How to use this guide

Precision Bid Win connects preconstruction and project execution. Use the numbered workflow for a complete bid-to-closeout process, or jump directly to a tool when you need a specific task.

Access model New accounts receive a guided demo project. Creating real projects, exporting deliverables, and other paid capabilities require the applicable monthly, annual, complimentary, or library access shown in Account & Billing.

The full workflow

Stage	What happens	Primary screen
1 · Prepare	Set company identity, rates, fuel price, crew assumptions, and team access.	Account & Billing; Libraries; Team & Approvals
2 · Create	Create a project and select Utilities, Demolition, Site Concrete, and/or Dirt Work.	Projects
3 · Take off	Upload or reuse drawings, run AI analysis, review confidence, calibrate, trace, and count.	Estimate; Drawings; Review Queue
4 · Estimate	Edit quantities, production, crews, materials, equipment, and job-length fleet.	Trade estimate pages; Overall Estimate
5 · Price and plan	Build the customer bid, exclusions, overhead, CPM/Gantt schedule, and agency files.	Bid Pricing; Schedule; Bid Schedule Import
6 · Approve and award	Review exceptions, obtain approval, then lock the original budget.	Overall Estimate; Project Controls
7 · Execute	Track documents, commitments, resources, daily production, costs, changes, billing, safety, quality, and closeout.	Command Center; Field; PM Log; Project Controls
8 · Monitor	Review forecast profit, WIP, over/under billing, and portfolio health.	Project Controls; Company WIP

Navigation conventions

- The top-right menu changes when a project is open. Project-specific links appear first; company-wide tools follow.
- Blue actions create, save, analyze, export, or advance work. Gray outlined actions open supporting tools.
- Most estimate edits save automatically. Watch the save status before leaving a page.
- Desktop provides dense tables; mobile uses touch-sized controls and horizontal scrolling where needed.

CONTENTS

Guide map

01	Account, demo, and navigation
02	Company libraries and labor/equipment setup
03	Create projects and quick bids
04	Drawings, AI takeoff, and measurement
05	Build and edit the detailed estimate
06	Overall estimate, review, and approval
07	Bid pricing, customer PDF, and exports
08	Gantt, CPM, and bid schedule import
09	Award, budget, and project controls
10	Field reports and production feedback
11	Project management records
12	Project Command Center
13	Company WIP, teams, billing, and integrations
14	Recommended operating procedure and troubleshooting

Scope note

This guide describes the functions visible in the current program. Results from AI and imported files must be reviewed by a qualified estimator or project manager before pricing, contracting, procurement, or construction decisions.

01

Account, demo, and navigation

Begin with the guided project, learn the screen structure, and set your company identity before estimating live work.

01 · GET STARTED

Sign in and use the demo

01 Open precisionbidwin.com and choose the sign-in or account creation action.

02 Sign in by email or the available Google option. Projects, drawings, libraries, and reports are private to the signed-in account and permitted team members.

03 On first access, open the demo project from Home or Projects. The demo walks through drawing review, quantities, estimating, bid pricing, scheduling, and project controls.

04 Use the menu button in the upper-right corner to move between company tools. When a project is open, the menu also shows that project's estimate, schedule, field, controls, and management screens.

05 Open Account & Billing to confirm plan access, project access, library access, renewal status, and receipts.

Home screen

- Recent Projects opens the latest saved work.
- Quick-bid links resume small pricing exercises.
- Tool tiles open Projects, Drawings, Bid Schedule, Bid History, Libraries, Team & Approvals, Company WIP, Project Operations, and Account & Billing.

Company identity

01 Open any project, then choose Bid Pricing Sheet.

02 Add the company name, address, phone, email, license, contact/estimator, logo, bid title, bid number, party type, customer/owner, and bid date.

03 Company fields are saved to the signed-in user profile and reused on later bids. Project-specific bid information remains attached to that bid.

> **Best practice** Complete the company identity and libraries before the first production estimate. This prevents avoidable repricing and produces a finished customer-facing PDF.

02

Libraries and company rates

Control the assumptions AI and estimators use for materials, crews, equipment, production, and quick pricing.

02 · CONFIGURE

Libraries

Open Libraries from Home or the menu. Search, filter to “Only my items,” add rows, or edit any cell. Changes save when focus leaves the field. Editing a shared starter row creates a private company copy rather than changing the shared source.

Library	Use	Key fields
Materials & Assemblies	Material pricing and production assumptions used when building estimate lines.	Name, category, CSI, unit, material price, units/day
Labor Rates	Hourly labor basis for automatically predicted crews.	Classification, role ID, base, fringe, total rate
Equipment	Owned/rented equipment and operating cost.	Ownership/rental base, operating cost, fuel burn, total hourly, monthly rate
Bid Items	Quick bids and historical unit-cost checks.	Code, description, category, unit, low/average/high cost

Equipment cost setup

01 Open the Equipment tab.

02 Set company diesel cost per gallon.

03 For each machine, identify it as owned or rented; enter ownership/rental cost, operating cost, and fuel gallons per hour.

04 Review the calculated total hourly rate. Company-owned costs should include the ownership recovery basis you intend to charge to work.

05 Enter monthly rates for machines that remain on a job.

Labor rate setup

01 Open Labor Rates.

02 Confirm each classification, including Foreman and Pipe Layer as separate roles.

03 Enter base wage, fringe, and total hourly cost.

04 When an estimate opens, saved company labor rates synchronize into its crew members.

> **Rate responsibility** New Mexico prevailing wages are available as a source basis, but the estimator must confirm the correct decision, county, classification, fringe, overtime, burden, and effective date for each bid.

03

Projects and quick bids

Create a full plan-driven estimate or price a small change with a lighter workflow.

03 · START WORK

Create a full project

01 Open Projects and choose New Project. If project creation is locked, start monthly or annual access from Account & Billing.

02 Enter project name, sheet reference, New Mexico wage county, drawing scale, and revision.

03 Select one or more scopes: Site Utilities, Demolition, Site Concrete, Dirt Work. Each selected section keeps its own labor, materials, equipment, and fleet.

04 Choose Create & Open. The program opens the first selected section. Use the project menu to move between sections or open Overall Estimate.

05 To reuse a prior estimate structure, choose Start new bid from this. The program copies line items, crews, equipment, and prices but removes drawing references and review status.

Create a quick bid

01 From Projects, choose New Quick Bid.

02 Enter the work description, customer/owner, and reference or change-order number.

03 Choose Create & Price. Add items from the bid-item library, adjust quantity and markup, then produce the quick-bid PDF.

Choose the right path

Use a full project for drawing takeoff, trade separation, schedule, field tracking, or post-award controls. Use Quick Bid for a small change, time-sensitive quote, or library-based price that does not need plan analysis.

Project care

- Project cards show updated date, line-item count, and estimate total.
- Deleting a project removes its associated private project data. Confirm before deleting.
- The demo is for learning and does not replace a paid production project.

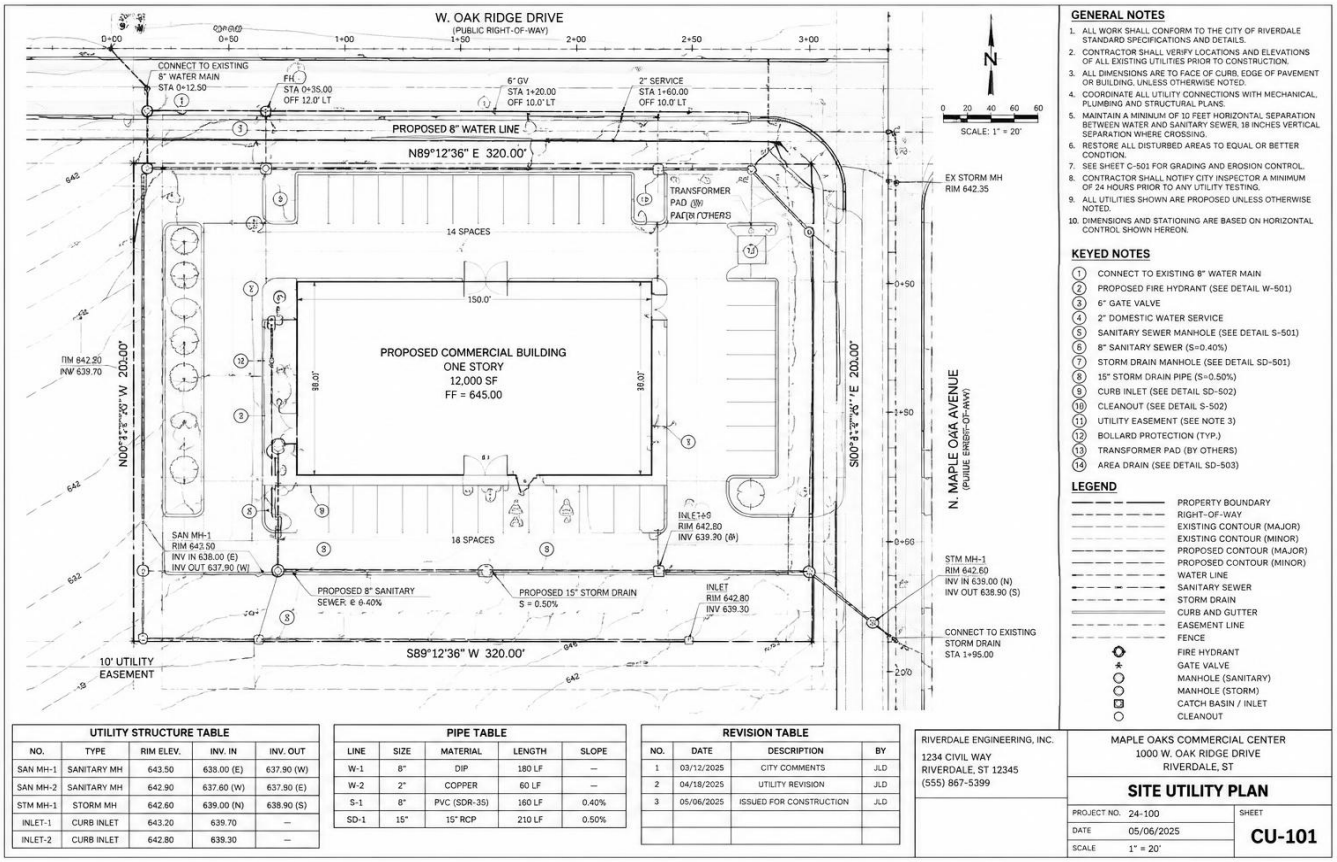
04

Drawings, AI takeoff, and measurement

Turn plan sheets into traceable quantities while keeping a direct line from every estimate item back to the drawing.

04 · TAKE OFF

Upload or reuse plan sheets



01 Open the project's trade estimate and open the drawing/plan panel, or open the company-wide Drawings page.

02 Select a PDF no larger than 25 MB. For faster analysis, split large plan sets into focused sheets or small discipline groups.

03 To avoid uploading a duplicate, choose Reuse a drawing you already uploaded and select the prior sheet. The program copies it to the destination project while preserving the source.

04 From the estimate workspace, start AI analysis. The reader detects scope, scale clues, notes, quantities, structures, and possible line items. Keep the page open while the analysis runs.

05 Review the project briefing and each proposed finding before adding it to the estimate.

AI review required	AI takeoff is an estimator aid, not a sealed quantity. Confirm scale, plan revision, limits, notes, profiles, details, alternates, and specifications before using quantities.

04 · TAKE OFF

Review, calibrate, trace, and count

Drawing-linked estimate workflow

01 Open a line item with a drawing reference. The viewer starts on the referenced page and location.

02 Select the item in the task tray. Its saved trace or structure highlight appears on the plan.

03 If the drawing scale is not reliable, choose calibration and mark two points with a known distance. Enter the real-world distance.

04 Choose the measurement that matches the item: length for pipe/linear work, area for surface work, or count for structures and appurtenances.

05 Trace the geometry. Check the live measured quantity, then save it to the line item. The corrected geometry is stored separately from the original AI trace for auditability.

06 Use Undo while tracing if a point is wrong. Reopen a saved measurement to verify or revise it.

Takeoff Review Queue

- Open Takeoff Review Queue from the project menu.
- Prioritize low-confidence or unmatched findings.
- Compare description, quantity, unit, page, location, notes, and visible drawing evidence.
- Correct, accept, or leave unresolved. Do not mark an item reviewed until its scope and quantity are defensible.

Drawing management

- The Drawings page shows uploaded date and AI finding count.
- Use View to inspect a sheet without analyzing it.
- Use Remove only when the sheet is not needed; line-item references depend on project drawing records.
- The Command Center document register tracks controlled drawing numbers, disciplines, revisions, and transmittals separately from raw takeoff uploads.

05

Detailed estimating

Build transparent labor, material, and equipment costs for every task—then edit any assumption.

05 · ESTIMATE

Understand a line item

Area	What to confirm	Cost effect
Scope	Name, category/phase, CSI code, unit, quantity, plan note, drawing reference.	Defines what is priced and how it appears downstream.
Production	Units per day and expected shift days.	Drives labor and typical equipment hours.
Labor	Crew roles, counts, hourly rates, and labor-hour override when needed.	Crew cost remains separate from material and equipment.
Materials	Material selection, unit price, waste/variance, and quantity basis.	Uses saved library pricing but remains editable.
Equipment	Machine, expected hours, hourly rate, owned/rented assumptions.	Task equipment remains visible and editable.
Review	AI status, confidence, quote flags, and estimator-reviewed state.	Controls exception review before bid export.

Step-by-step estimate editing

01 Open the applicable trade section.

02 Add an item from the master library or accept a reviewed AI finding.

03 Confirm quantity and unit against the drawing.

04 Set the production rate. The program calculates work duration and aligns predicted labor/equipment hours when a production basis exists.

05 Review the AI-proposed crew. Add, remove, or change classifications, worker counts, and rates.

06 Review materials from the saved library. Correct unit price, quantity factor, or quote requirement.

07 Review predicted equipment and hours. Change machine selections, rates, and hours when means and methods differ.

08 Mark the line reviewed when scope, quantity, crew, materials, equipment, and notes are complete.

09 Watch the save status. Use the visible Undo/Redo controls or Ctrl/Cmd+Z, Ctrl/Cmd+Y, and Ctrl/Cmd+Shift+Z during the current editing session.

05 · ESTIMATE

Job-length equipment and trade separation

Job-length fleet

01 Open the job-length equipment panel for the current trade section.

02 Enable fleet mode when equipment will remain for the full section rather than being charged separately on each task.

03 Review typical machines such as compact excavator, trench roller, upright tamper, mini skid steer, and water truck. Add dump trucks only when haul or dirt work requires them.

04 For each machine choose monthly, daily, or per-each billing; enter quantity, duration, and rate.

05 Assign one-time or day-rate rentals to the applicable line item.

06 Review the spread. Monthly fleet cost distributes across section line items based on work; item-specific charges stay with their selected item.

07 If a fleet item is removed, confirm its cost is redistributed correctly. Disabling fleet mode restores the task equipment that was stashed when fleet mode was enabled.

Multiple trade sections

- Utilities, Demolition, Site Concrete, and Dirt Work keep independent crews, equipment, and estimate assumptions.
- Use each trade page for task-level pricing. Use Overall Estimate only to compare stand-alone totals and shared-award savings.
- Do not duplicate a shared scope in two trade sections unless the bid intentionally carries that cost twice.

Estimate exports

- Export the estimate workbook for line-item detail.
- Export breakdown Excel/PDF for materials by item, labor hours by item, and equipment hours/rates by item.
- Use Accounting Export from Overall Estimate for job-cost budget CSV formats.

06

Overall estimate, review, and approval

Combine trades deliberately, identify risk, and obtain an internal sign-off before customer pricing.

06 · REVIEW

Overall Estimate

01 Open Overall Estimate from the project menu.

02 Confirm which trade sections are active. Open each section to resolve missing or unreviewed items.

03 Review labor, material, equipment, mobilization, supervision, site overhead, duration, and total for each stand-alone trade package.

04 Edit mobilization by section, superintendent weekly cost, and site-overhead weekly cost.

05 Select sections in Combine these sections. The comparison charges shared mobilization once, shares supervision/site overhead over the longest selected duration, and avoids duplicate job-length equipment where applicable.

06 Use the displayed savings as a pricing decision input—not as an automatic customer discount.

AI Bid Review

• Run the review after major estimate edits and again before export.

• Investigate flags for unit-cost outliers, production assumptions, missing scope, quote exposure, and recommended exclusions.

• Record the reason for keeping an unusual assumption so reviewers understand the decision.

Team approval

01 Invite estimators or reviewers from Team & Approvals.

02 The invitee signs in with the invited email; accepted team projects appear in their Projects list.

03 Submit the bid through the approval panel on Overall Estimate.

04 A reviewer approves it or requests changes. Resolve requested changes before final export.

Control point Treat “reviewed,” internal approval, and customer export as separate gates. A reviewed line item can still belong to a bid that needs commercial or executive approval.

07

Bid pricing and exports

Convert detailed cost into a polished proposal without hiding the estimate logic from your internal team.

07 · PRICE THE BID

Bid Pricing Sheet

01 Open Bid Pricing Sheet. For multi-trade jobs, choose a single trade package or Combined.

02 Confirm company identity, logo, customer/owner or contractor designation, bid title, number, and date.

03 Set field overhead, home-office G&A;, bonds, insurance, profit, and contingency percentages.

04 Review Division 01 general requirements. Add, rename, price, or remove lump-sum indirect items.

05 Create Schedule of Values groups when several estimate tasks should appear as one customer pay item. Assign the underlying line items to each group.

06 Review the spread of indirects and overhead. Apply manual per-item adjustments where the default spread does not reflect commercial intent.

07 Edit the exclusions list. Keep exclusions specific to the plans, specifications, schedule, site access, testing, restoration, taxes, escalation, and unknown conditions.

08 Run the export review, resolve any jump-to-item warnings, then export.

Customer PDF behavior

• The branded PDF centers the proposal content and preserves the company logo’s aspect ratio.

• Bid lines omit unit price in the requested presentation while retaining totals.

• Exclusions are split into two columns.

• The PDF backdrop is applied to the exported proposal, not the estimating interface.

Other exports

Export	Purpose
Bid package / PDF	Customer-facing proposal and scope.
Estimate workbook	Internal detailed cost review.
Breakdown Excel/PDF	Labor, material, and equipment purchasing/planning by line item.
Accounting CSV	Job-cost budget import for supported accounting layouts.
Schedule CSV/PDF	Operations planning and schedule communication.
AASHTOWare CSV / EBSX	Agency bid submission workflow from validated source data.

08

Scheduling and agency bid files

Turn labor and production assumptions into an executable plan, then export the schedule or bid data.

08 · PLAN THE WORK

Gantt schedule

01 Open Schedule (Gantt) or choose Generate Schedule from Bid Pricing.

02 Set the number of crews on site.

03 Set the planned start date. The working calendar is Monday through Thursday, 10 hours per day.

04 Review phase order, task duration, crew assignment, start, and finish. Durations come from line-item labor hours and production rates.

05 Use the up/down controls to change sequence within a phase. Change crew count to test finish-date alternatives.

06 Export CSV or PDF, or print the visible schedule.

Level 4 CPM

- Generate the CPM preview from the bid workspace when logic-driven scheduling is required.
- Review activity IDs, WBS, durations, milestones, relationship types, and lag.
- Validate NTP, phase logic, pipe sequence, constraints, calendars, resources, and required contract milestones before external use.
- Use the available CSV transfer for P6/MS Project ingestion; treat it as an import aid, not a complete native XER/XML replacement.

AASHTOWare bid schedule

01 Open Bid Schedule Import.

02 Upload the owner/agency spreadsheet.

03 Map or validate item number, description, unit, quantity, and pricing fields.

04 Resolve missing, duplicate, invalid, or unmapped rows.

05 Export the AASHTOWare-ready CSV or available agency format and validate it in the agency's current software before submission.

Schedule limitation The estimator Gantt uses a fixed 4×10 workweek. Contract calendars, holidays, weather days, permit windows, and resource constraints must be validated in the CPM or external scheduling system.

09

Award, budget, and cost control

Freeze the bid as the original budget, post actual cost, forecast completion, and protect profit.

09 · AWARD THE JOB

Project Controls

01 Open Project Controls (Cost & Profit).

02 Choose Mark as awarded. This snapshots the current estimate as the original budget; later estimate edits do not rewrite that award basis.

03 Complete Contract & Handoff: contract value/number, owner, retainage, notice to proceed, completion date, liquidated damages per day, and estimator-to-PM notes.

04 Confirm each budget line's quantity, labor, material, equipment, budget hours, crew rate, and equipment rate.

05 Begin posting production through Daily Reports. Labor and equipment actuals are calculated from reported hours multiplied by the locked snapshot rates.

06 Use Add a cost for material invoices, subcontract cost, equipment cost not captured in hours, labor adjustments, and general/other cost. Select the correct cost code.

07 Review actual-to-date, percent complete, cost to complete, forecast final cost, variance, projected profit, and bid profit.

08 Choose Ask the AI to explain likely causes of gain/fade and suggested actions. Verify every explanation against source records.

How the numbers connect

Metric	Meaning
Original budget	Labor + material + equipment captured when the project is awarded.
Actual to date	Field labor/equipment at snapshot rates plus manually entered costs.
Percent complete	Installed quantity divided by budget quantity, capped at 100% by line.
Forecast final cost	Actual cost plus remaining budget based on quantity progress, plus approved change cost.
Projected profit	Current contract value less forecast final cost.
Cost efficiency	Earned budget divided by actual cost; above 1.00 is favorable.
Over/(under) billing	Billed amount less earned contract revenue.

Budget integrity

Award only after internal approval. If the scope changes after award, use change management rather than silently rewriting the original budget.

10

Field reporting and production feedback

Give the foreman a focused daily workflow and feed actual performance back into estimates and forecasts.

10 · CAPTURE ACTUALS

Daily Reports & Tracking

01 Open the project and choose Daily Reports & Tracking.

02 Enter report date, foreman, and weather.

03 For each worked line item, enter installed quantity, man-hours, and equipment hours.

04 Add notes for delays, extra work, access, visitors, deliveries, or unusual conditions.

05 Submit the report. If the device is offline, the report is queued locally and uploads when connectivity returns.

06 Review percent complete, earned hours, actual hours, productivity factor, earned value, and actual production rate.

07 When enough representative production exists, choose Use actual to replace the estimate production rate with the observed rate. Use care: early startup days and abnormal conditions may not represent future work.

08 Review past reports and delete only incorrect duplicates or entries that should not post to controls.

Field interpretation

- Productivity factor above 1.00 means earned hours exceed actual hours—favorable against the bid.
- Below 1.00 means the work is consuming more hours than earned.
- Installed quantity drives earned progress; labor/equipment hours drive actual cost. Missing either side distorts forecasting.
- Daily reports flow into Project Controls, while broader field, safety, and quality records live in Project Management.

Daily discipline	Submit one complete report per workday, with quantities and hours posted to the same cost code. Reconcile timecards, equipment logs, delivery tickets, and report notes before weekly forecasting.

11

Project management records

Control changes, commitments, billing, RFIs, submittals, safety, quality, risk, and closeout in one numbered log.

11 · MANAGE THE JOB

Project Management Log

Open Project Management Log. Choose a record type in the left menu, then choose + New. Enter title, status, due date, cost code, amount, and type-specific fields. Numbers are assigned by the system within the project and record type.

Group	Records	Primary use
Money	Change orders; purchase orders & subcontracts; pay applications	Contract change, commitment, billing, collection, retainage, lien waiver
Documents	RFIs; submittals; meetings & correspondence; schedule updates	Due dates, ball-in-court, questions/answers, approvals, delay records
Field & Safety	Punch; safety; quality tests; equipment & rentals	Corrective action, tests, location, assigned work, machine/rental tracking
Risk & Closeout	Risk register; closeout checklist	Exposure, mitigation, turnover, lessons learned

Key procedures

01 For a potential change, create a Change Order, select owner or subcontractor type, enter customer price, company cost, schedule days, reason, status, and cost code. Approved owner changes increase contract value; approved change cost increases forecast budget.

02 For procurement, create a Purchase Order/Subcontract record with vendor, commitment value, retainage, delivery date, scope, received/invoiced amount, and status.

03 For monthly billing, create a Pay Application with work amount, stored materials, retainage, release, payment received, period end, and lien-waiver status.

04 For RFIs/submittals, maintain due dates, status, and ball-in-court. Overdue open items appear in summary counts.

05 For safety/quality, choose the record type, enter incident/test details, location/result, corrective action, and status.

06 For closeout, choose Add standard checklist to seed punch completion, as-builts, O&M; manuals, warranties, lien waivers, final changes, retainage, and lessons learned.

12

Project Command Center

Operate documents, schedule, procurement, resources, team access, and turnover from one project hub.

12 · COORDINATE

Command Center tabs

Tab	Actions
Overview	Review open markups, activity count, field reports, commitments, active equipment, open closeout work, and immutable activity history.
Documents	Register drawing sheet number, title, discipline, revision, and status; review the drawing register and transmittal log.
Schedule	Transfer estimate items into schedule activities, review duration/remaining duration/% complete, capture baselines, and open the Gantt.
Procurement	Add commitment lines with PO/subcontract reference, description, quantity, unit, unit cost, cost code, receipts, invoices, and delivery date.
Resources	Dispatch equipment with operator, start/end, status, and internal hourly rate.
Team	Invite project participants with detailed roles such as PM, superintendent, foreman, accounting, safety/quality, estimator, reviewer, owner, engineer, subcontractor, or viewer.
Closeout	Register installed/turnover assets, location, manufacturer, model, serial number, warranty, and acceptance status; jump to the closeout workflow.

Recommended sequence

01 At award, add the project team and verify their roles.

02 Register the current drawing set and distribute revisions through controlled transmittals.

03 Transfer the estimate into schedule activities; review durations before capturing the baseline.

04 Create commitments and detailed procurement lines before goods or subcontract work are released.

05 Dispatch equipment and keep off-rent/end dates current.

06 Review immutable history during progress meetings.

07 Update turnover assets and the standard closeout checklist throughout the job—not only at the end.

One source of truth

Use Command Center for operational control, Project Management Log for formal records, Daily Reports for production, and Project Controls for financial forecast. Keep shared dates, cost codes, and statuses consistent across them.

13

Portfolio, teams, billing, and integrations

Manage company-wide performance and access without mixing data between projects or users.

13 · RUN THE COMPANY

Company WIP and portfolio

01 Open Company WIP. Only awarded projects appear.

02 Review contract backlog, earned revenue, billed amount, over/under billing, and projected profit.

03 Open a project from the table to investigate forecast cost, actual cost, percent complete, margin, RFIs, delays, and red/yellow/green health.

04 Resolve underbilling, profit fade, delay, or excessive open-item warnings in the project's source records.

Team access

- Company Team & Approvals supports estimator and reviewer access across owner projects.
- Project Command Center supports more detailed project participant roles.
- Invitations activate when the invited person signs in with the same email.
- Remove access promptly when a person leaves the team or project.

Billing

- Account & Billing shows plan, project access, library access, renewal/end date, and billing history availability.
- Monthly access is listed at $425 with a $25 monthly introductory discount for the first three months where eligible.
- Annual access is $3,500 and the pricing screen shows the annual savings comparison.
- A separate full-library unlock may be available. Checkout, taxes, receipts, renewals, and cancellation are handled through the billing provider.

Connected assistants

- Authorized AI assistants can use the app's secure connection to list the signed-in user's accessible projects and read estimate breakdowns.
- Assistant access follows the same private project rules as the application.
- External accounting/scheduling/design integrations may require vendor credentials and configuration; CSV exports remain the practical transfer method where a live connector is not configured.

14

Standard operating procedure

A repeatable bid-to-closeout checklist for estimators, reviewers, project managers, and field leaders.

14 · OPERATING PROCEDURE

Estimator checklist

01 Confirm company identity, wage rates, material pricing, equipment rates, fuel, and library ownership.

02 Create the project; select all bid sections but keep each trade’s resources separate.

03 Upload/reuse the correct drawing revision; analyze focused sheet groups.

04 Review project briefing, low-confidence findings, notes, details, profiles, and specifications.

05 Calibrate and manually verify representative lengths, areas, and counts.

06 Complete quantities, production, labor, materials, equipment, quotes, and job-length fleet by line.

07 Run AI Bid Review; resolve flags and add documented assumptions/exclusions.

08 Review Overall Estimate and shared-award savings.

09 Create the bid package; check company/customer data, indirects, markups, groups, spreads, and exclusions.

10 Generate the schedule and confirm duration/crew assumptions.

11 Obtain reviewer approval; export and archive the final bid version.

Project manager checklist

01 Mark the won bid awarded and complete contract/handoff data.

02 Invite project roles; register current drawings; transfer schedule and capture baseline.

03 Create commitments and procurement lines before release.

04 Set up change, RFI, submittal, safety, quality, risk, and closeout logs.

05 Require complete daily quantities and hours.

06 Post invoices/other actual costs to correct codes; update pay applications and collections.

07 Review forecast profit, productivity, commitments, risk, delays, and AI variance explanation weekly.

08 Review Company WIP monthly.

09 Complete turnover assets, as-builts, O&M; manuals, warranties, lien waivers, retainage, and lessons learned.

14 · HELP

Troubleshooting and data-quality checks

Problem	Check first	Action
AI returns no result or times out	File size, page count, connection, whether the PDF is readable.	Split to focused sheets; retry. Preserve the upload and manually add/measure urgent items.
Quantity looks wrong	Scale, page, calibration, geometry type, plan revision.	Recalibrate; retrace; compare schedule/profile/details.
Labor or equipment cost is wrong	Production rate, crew count/rate, hours rule, fleet mode.	Correct the source assumption; avoid offsetting errors with markup.
Estimate will not save	Save status and connection.	Wait for saved status; retry after connection returns. Do not close while saving.
Cannot create project/export	Account access and billing status.	Open Account & Billing; start or restore applicable access.
Drawing space/file rejected	25 MB limit, PDF type, project storage allowance.	Split/compress PDF or reuse an existing stored sheet.
Forecast is misleading	Award snapshot, daily quantities/hours, manual costs, approved changes.	Reconcile source records by cost code before changing forecast assumptions.
Schedule finish is unrealistic	Crew count, production, 4×10 calendar, phase order, constraints.	Correct estimate inputs and validate CPM/calendar externally where required.
Invite is not active	Exact invited email and sign-in status.	Invite the correct email; recipient signs in with that email.

Required quality checks before relying on output

- Drawing revision and addenda are current.
- Every line item has a defensible page/location reference or documented basis.
- Quantities, units, waste, production, crews, rates, and equipment agree.
- Vendor/subcontract quotes are current and included or clearly excluded.
- Indirects, bond, insurance, contingency, profit, and taxes match the bid strategy.
- Customer-facing scope and exclusions match the internal estimate.
- Schedule assumptions match the contract calendar and field plan.
- Award budget, daily reports, commitments, invoices, changes, and billing reconcile by cost code.

Support record When reporting a problem, include the project name, screen, action, exact message, drawing filename/page, and whether the issue occurs again after reopening. Do not include passwords or payment details.

REFERENCE

Feature directory

Screen	Use it for
Home	Recent work and shortcuts to every company tool.
Projects	Create/copy/delete full estimates and quick bids.
Drawings	Upload, assign, reuse, view, or remove plan PDFs.
Trade Estimate	AI takeoff, drawing-linked measurement, detailed costs, fleet, exports.
Overall Estimate	Trade comparison, savings, AI review, approvals, accounting export.
Bid Pricing Sheet	Commercial pricing, SOV groups, indirects, exclusions, proposal export.
Schedule	4×10 Gantt, crew scenarios, sequence, PDF/CSV.
Bid Schedule Import	Spreadsheet validation and AASHTOWare export.
Field	Offline-capable daily production and actual-rate feedback.
Project Controls	Award budget, actuals, forecast, profit, AI variance.
Project Management	COs, POs, pay apps, RFIs, submittals, safety, quality, risk, closeout.
Command Center	Documents, schedule baselines, procurement, dispatch, roles, turnover.
Company WIP	Portfolio cost, billing, profit, margin, and health.
Libraries	Private company materials, labor, equipment, and bid items.
Team & Approvals	Company estimators/reviewers and bid approval.
Account & Billing	Access, subscriptions, library entitlement, receipts, company account.

Precision Bid Win is designed to preserve a connected chain from drawing evidence to quantity, detailed cost, customer bid, schedule, field production, actual cost, forecast profit, and closeout. Accuracy depends on complete inputs and professional review.

precisionbidwin.com