Purpose:

To provide subcontractors and vendors access to project documents online.

Procedure:

1) We are currently using SmartBid as our bid management service.
2) Open SmartBid and log-in.
3) Select “Projects” then “Add Projects”
4) Complete the information requested with each tab (1. Project Info, 2. Groups /Filters, 3. Trades, etc.) Below are some specific notes for each tab:
   A) Project Information: The “Project ID” should be Crain Construction job number.
   B) Trades: Select trades and then select “save”, the green icon above all trade selections
   C) Files/ Plan Room: See below.
   D) Groups & Filters: See below.
   E) Qualified: See below.
   F) Invited: See below.
5) Tab 2 Groups & Filters:
   A) SmartBid requires filters, but these can be modified.
   B) Example: Hotel projects often have subcontractors and /or vendors that travel. You may need to adjust or remove the zip code filter to select some of these companies.
6) Tab 4 Files / Plan Room – Uploading documents:
   A) Select tab 4. Files/ Plan Room.
   B) Upload plans and specifications in the appropriate folder. Sub-folders may be created as needed, such as separating plans into Civil, Architectural, Structural, etc.
   C) “General Documents” is where you can include supplemental information (phasing plan, special instructions, exhibits, RFI log, etc.)
   D) Once files have been added, select “start upload”.
   E) Select “Done.”
7) Tab 6 Qualified:
   A) From this tab, select all subcontractors and vendors.
   B) When subcontractors and vendors have been selected, send the bid invitation.
      i) Select “Send Communications”.
      ii) Confirm the “From” in the pull-down selection.
      iii) Choose the template -invitation to Bid Crain
      iv) Select “Send Communications”.
8) Tab 7 Invited:
   A) From this window you will be able to
      i) Review invited bidders.
      ii) Check the status of invited bidders (accepted, declined, etc.)
9) Additional correspondence: Addenda, Memos, etc.
   A) Upload any new documents as necessary in Tab 4 Files/Plan Room.
   B) From Tab 6 Qualified, select the subcontractors/vendors.
   C) Select “Send Communications”
      i) Select Template

ii) Modify Template
iii) Select Attachment(s)