

SECTION 002000 - PROCORE EBIDDING INSTRUCTION TO BIDDERS

SECTION 002000
PROCORE EBIDDING INSTRUCTION TO BIDDERS**THIS PROJECT IS BEING ELECTRONICALLY BID**
HARD COPY BIDS WILL NOT BE ACCEPTED.

Please review the instructions in the bid documents on how to register as an electronic bidder. All bids are to be prepared and submitted at www.procore.com.

For all your eBidding questions and step-by-step directions on submitting an electronic bid directly from Procore please follow the link below:

<https://support.procore.com/products/online/user-guide/project-level/bidding/tutorials/submit-a-bid>

To contact Procore directly with any eBidding questions, contact their customer support staff directly:

<https://support.procore.com/references/contact-support>

[Procore Live Chat](#)

[Email Procore](#)

[Call Procore](#)

Monday – Thursday 24 hours
Friday 12 AM - 11 PM (CDT)
Saturday 9 AM - 8 PM (CDT)
Sunday 9 AM - 12 AM (CDT)

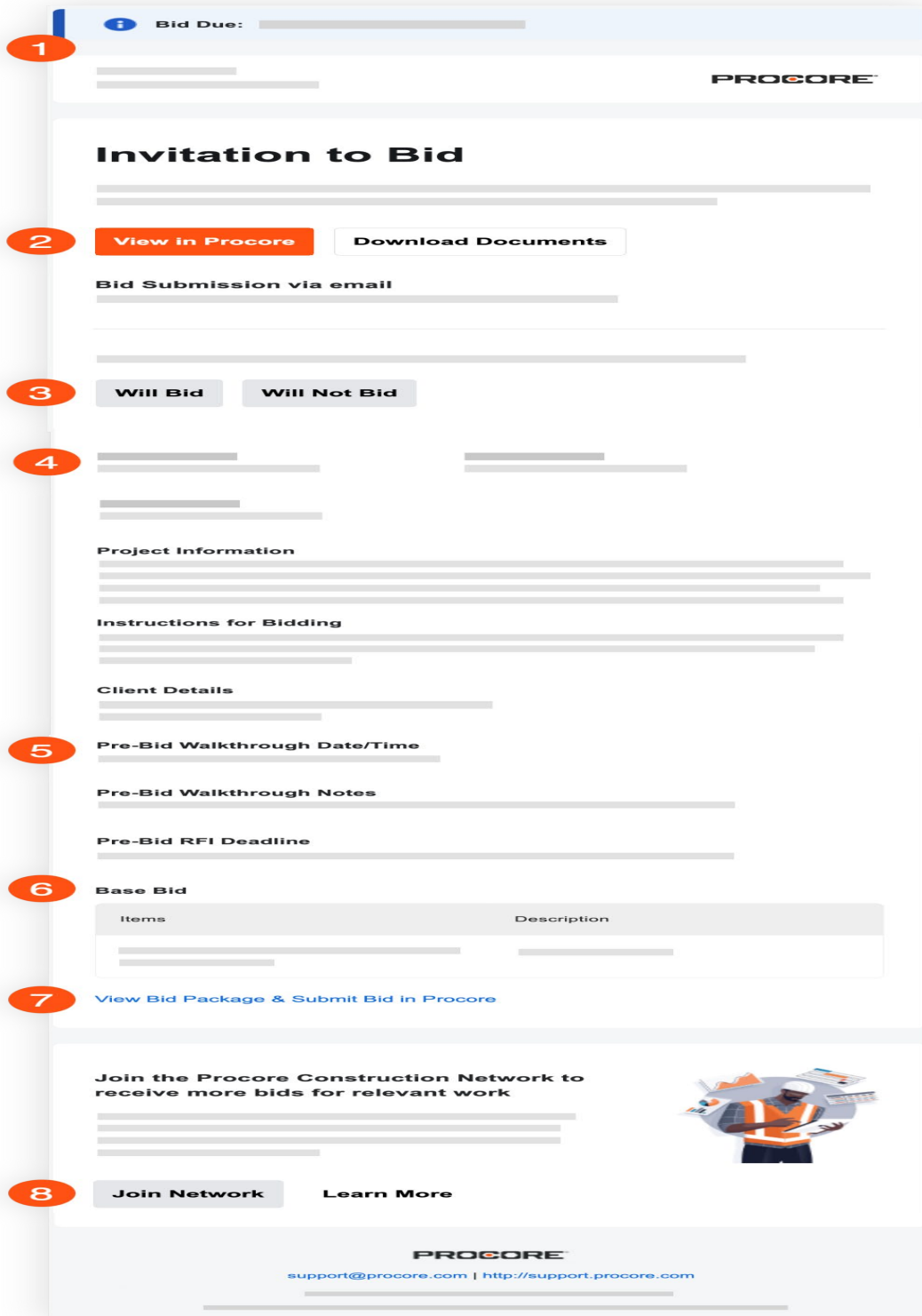
NOTE

- Only one person can submit a bid on your company's behalf, even if the invitation email was sent to multiple people.
- You can only view the bid sheet if it was sent to your email directly (not forwarded from another person at your company). If you need access to the bid sheet, please contact the account owner of the Procore project. If you're not sure who the right contact is, you can [contact Procore Support](#) for assistance.

SECTION 002000 - PROCORE EBIDDING INSTRUCTION TO BIDDERS

1) 'Invitation to Bid' Email Overview

See the sections below to learn more about the information and actions that are included on bid invitation emails sent from Procore.



SECTION 002000 - PROCORE EBIDDING INSTRUCTION TO BIDDERS

1

BID DUE DATE AND INFORMATION

The bid due date, company name, and project name are shown at the top of the email.

2

VIEW OR DOWNLOAD BID DOCUMENTS

To download the bid documents (including any specifications, drawings, and documents) for this project, click **Download Documents**. You can also open and download the documents by clicking **View in Procore**. See [Download Bid Documents](#).

Bid Submission via Email: You can choose to submit your bid without logging into Procore by replying to the email with an attachment.

3

STATE YOUR INTENTION TO BID

If you want to bid on the project, but don't want to submit your bid at this time, click **Will Bid**.

This will inform the company that you intend to bid before the due date.

If you don't want to bid on the company's project, click **Will Not Bid**.

This will inform the company that they should NOT expect a bid submission from you.

4

VIEW BID, PROJECT, AND CLIENT DETAILS

The project name, bid package name, and bid form name are shown in this section. You'll also see information about Procore and instructions for bidding.

5

PRE-BID WALKTHROUGH AND RFI INFORMATION

If available, view the date and time for the pre-bid walkthrough and RFI deadline, as well as any relevant notes.

Note: This section is optional for the bid solicitor. If no information was entered for a pre-bid site walkthrough or RFIs, you won't see this section.

SECTION 002000 - PROCORE EBIDDING INSTRUCTION TO BIDDERS

6

VIEW THE BASE BID

View the cost codes or general items that you've been selected to bid on. When you log in to Procore, you can select additional cost codes and enter your bid for each cost code.

7

VIEW BID PACKAGE AND SUBMIT IN PROCORE

To view the bid package and submit your bid, click **View bid Package & Submit Bid in Procore**.

- **If this is the first time you've received an invitation to bid on a project using Procore**, you'll be prompted to create a password for your account. After you create a password, you'll be able to access the bidding information.
- **If you already have an account in Procore**, you'll be able to log in with your existing credentials. After you're logged in, you'll see your bid sheet. You can also view your bid sheet in the company's [Planroom](#) tool.

8

OPTIONAL: JOIN THE PROCORE CONSTRUCTION NETWORK

If you're interested in creating a free Procore account where you can manage your business profile, add estimates, and respond to bids, click **Join Now**.

To learn more about the Procore Construction Network, click **Learn More**, or see [What is the Procore Construction Network?](#)

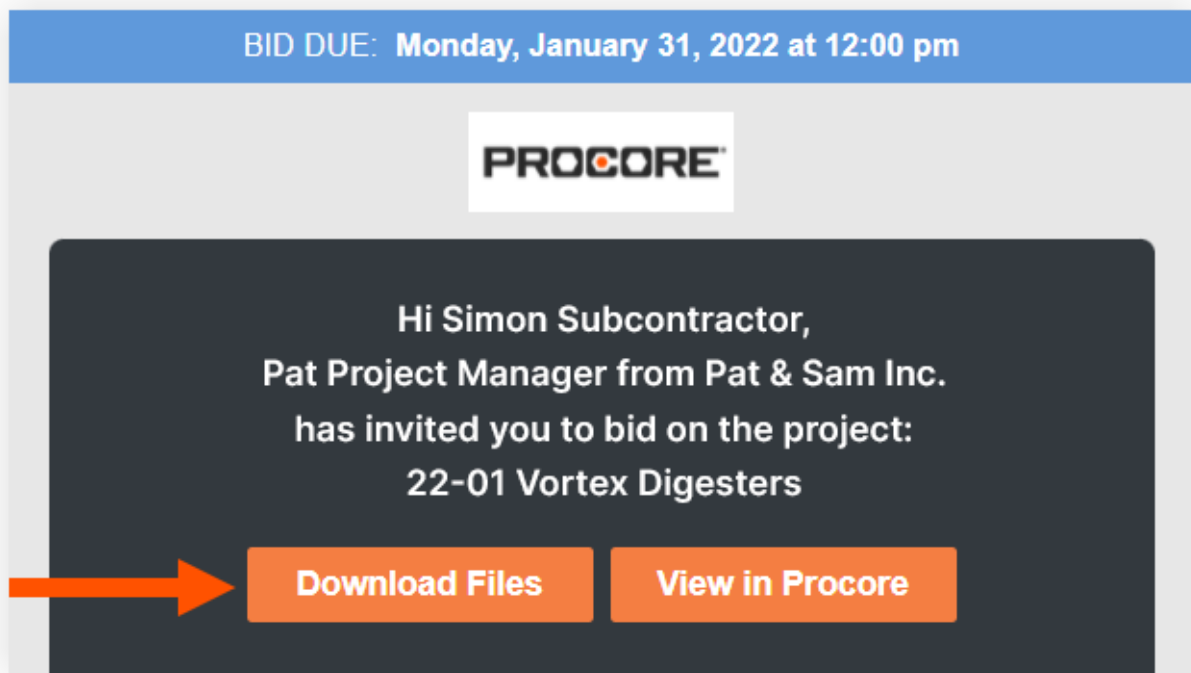
SECTION 002000 - PROCORE EBIDDING INSTRUCTION TO BIDDERS

2) View or download project specifications and drawings directly from the Email Invitation to Bid

There are two ways you can download the bid documents.

1. [From the Email Invitation](#)
2. [From the Planroom tool in Procore](#)

To download the bid documents for this project, click the **Download Files** link in the "Invitation to Bid" email.

**If you already have a Procore account, view or download project specifications and drawings from your company's Planroom Tool**

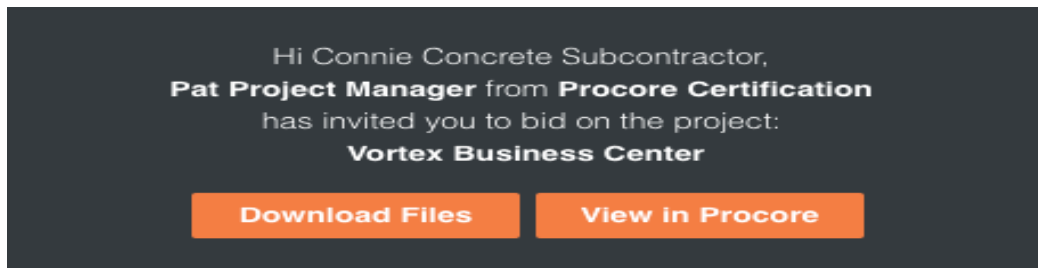
You can also download the documents from the company's Planroom tool in Procore.

1. Log in to Procore.
2. Navigate to the company's **Planroom** tool.
3. Click on the bid package you would like to download the bid documents from.
4. Click **Bid Documents** and select **Download Documents** or **Email Documents**.

SECTION 002000 - PROCORE EBIDDING INSTRUCTION TO BIDDERS

3) To submit a pre-bid RFI (request for information) during the bidding process

If you have been invited to bid on a project that is being managed using Procore's cloud-based construction software, you should have received an email invitation like the example below in your inbox. Make sure to log into your account using the email this email was sent to because only this email will give you access to the project in Procore.



Let **Procore Certification** know if you intend to bid on this project:

BID PACKAGE NAME

Vortex Business Center

PROJECT INFORMATION

[Procore Certification would like to invite you to participate in the bidding process for this construction project by utilizing our Construction Project Management Software, "Procore."](#) Procore helps to streamline the bidding process by allowing bid invitee's to download relevant bidding documents and submit their bids electronically. In this system, all electronic correspondence is tracked and archived, and bidders are provided with the most up to date information available for the project. We feel that this tool will simplify the bidding process for your project team by cutting down on the amount of filing and paperwork that typically accompanies bid management.

INSTRUCTIONS FOR BIDDING

If you need assistance accessing the bidding documents, please email Procore's customer support department at support@procore.com, and one of their support representatives will provide you with assistance.

Procore Certification looks forward to the opportunity to work with your project team in our new bidding process.

CLIENT DETAILS

Pat Project Manager • Office: (323) 463-9777, Mobile: (714) 375-8757 • test.project.manager1@outlook.com

[Procore Certification • Carpinteria, California 93013 United States](#)

SECTION 002000 - PROCORE EBIDDING INSTRUCTION TO BIDDERS

4) There are two ways you can submit a question/RFI to the project's GC:

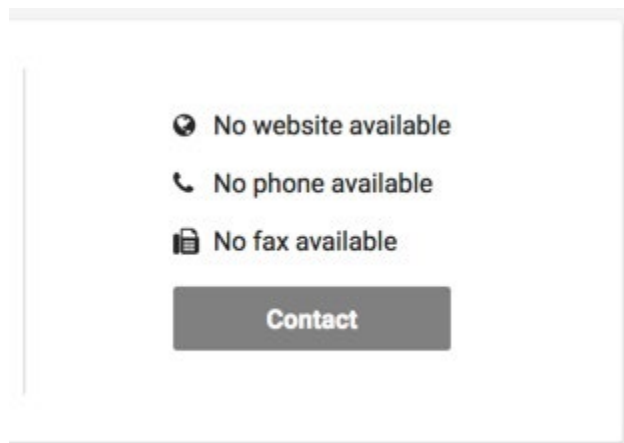
1) Reply to the invitation email

1. Simply respond to the invitation email with your question or RFI, and the GC will receive an email. They can respond directly back to your email.

Note: When you reply to the email, it will show up as a reply to the original email you replied to in the **Email** tab in the Planroom's bid package.

2) Send an email to the thread's link

1. When you log into Procore, navigate to the project's **Planroom** tool.
2. Click on the bid package you wish to submit a pre-bid question/RFI about.
3. Click **Contact** on the Bid Sheet.



OR

4. Click the **Email's** tab.
5. Copy and paste the email address or click the **Open Email Client** button in the blue header box that says, "To start a new thread associated with this bid, send an email to: ___".



SECTION 002000 - PROCORE EBIDDING INSTRUCTION TO BIDDERS

5) Access Your Bid Sheet and Submit Your Bid

See the ['Invitation to Bid' Email Overview](#) section for more information on viewing and submitting your bid from the 'Invitation to Bid' email.

1. From the Invitation to Bid email, click **View in Procore** to log in and view the bid sheet.
Note: If this is the first time you've received an invitation to bid on a project using Procore, you'll be prompted to create a password for your account. Your email address will be used to log in.
2. If you're not automatically redirected, navigate to the company's **Planroom**.
Note: The Planroom tool manages the bidding submissions and bid organization for the company to which you are submitting a bid.
3. From the Planroom tool, you'll see all the bid packages that you're invited to bid on. Click on a bid package to see the bid sheet, project, and bid information.
4. In the banner on the **Bid Sheet**, select whether you intend to bid or not. If you select that you plan on bidding, a '**Enter a Bid**' button will become available.
5. Click **Enter a Bid** and fill out your bid information.
 - **Cost Code:** In the field under Amount, indicate the amount you'd like to bid for. You can bid on other items by clicking **Add a Scope of Work**. The 'Total: \$' field is automatically calculated and populated with the total of all of your bids.
Note: You can delete cost codes that are not part of the original scope of work by clicking the **X** icon next to the cost code.
 - **Inclusions:** Enter any inclusions that may not be clearly stated in the related contract documents.
 - **Exclusions:** Enter any exclusions that may not be clearly stated in the related contract documents.
 - **Comments:** *Optional:* Add any comments you would like to send to the company.
 - **Attachments:** *Optional:* Add any relevant attachments to your bid sheet.
6. Click **Save for Later** if you'd like to revisit your bid sheet at another time.
7. When you're ready to submit your bid, click **Submit Bid**.

NOTE

You can also submit a bid by replying to the bid invitation email with one or more files attached to your email. After you send your bid submission, the bid solicitor will see that you submitted a bid and can review any files that were attached to your email.

The following file types are accepted: .pdf., doc, .docx, .xls, .xlsx, .zip, .ods, .odt, .fods, .fodt, and .txt.

SECTION 002000 - PROCORE EBIDDING INSTRUCTION TO BIDDERS

6) Sign up to join the Cambridge Housing Authority's contractor directory

Once you sign up for our contractor directory, CHA can email you our invitation to bids for our future projects. Please let us know your company's information, including an email contact for the person to direct these future invitations to bid to so they can review, express interest and submit a bid, along with the trades and services your company provides.

If you want to sign up for the Cambridge Housing Authority contractor directory or have any questions on bidding, please contact the Cambridge Housing Authority at bid@cambridge-housing.org

All Cambridge Housing Authority projects will be posted on our 'Solicitation and Bids' web page located at the link below:

<https://cambridge-housing.org/departments/fiscal/solicitations-and-bids/>

You can also join Procore's free public Construction Network to browse and make your company available to other public construction projects. Get discovered by contractors searching for their next project partner on the Procore Construction Network. [Claim your free account](#) to manage your business page, collaborate on projects, and respond to bids.

<https://www.procore.com/network/>

END OF SECTION