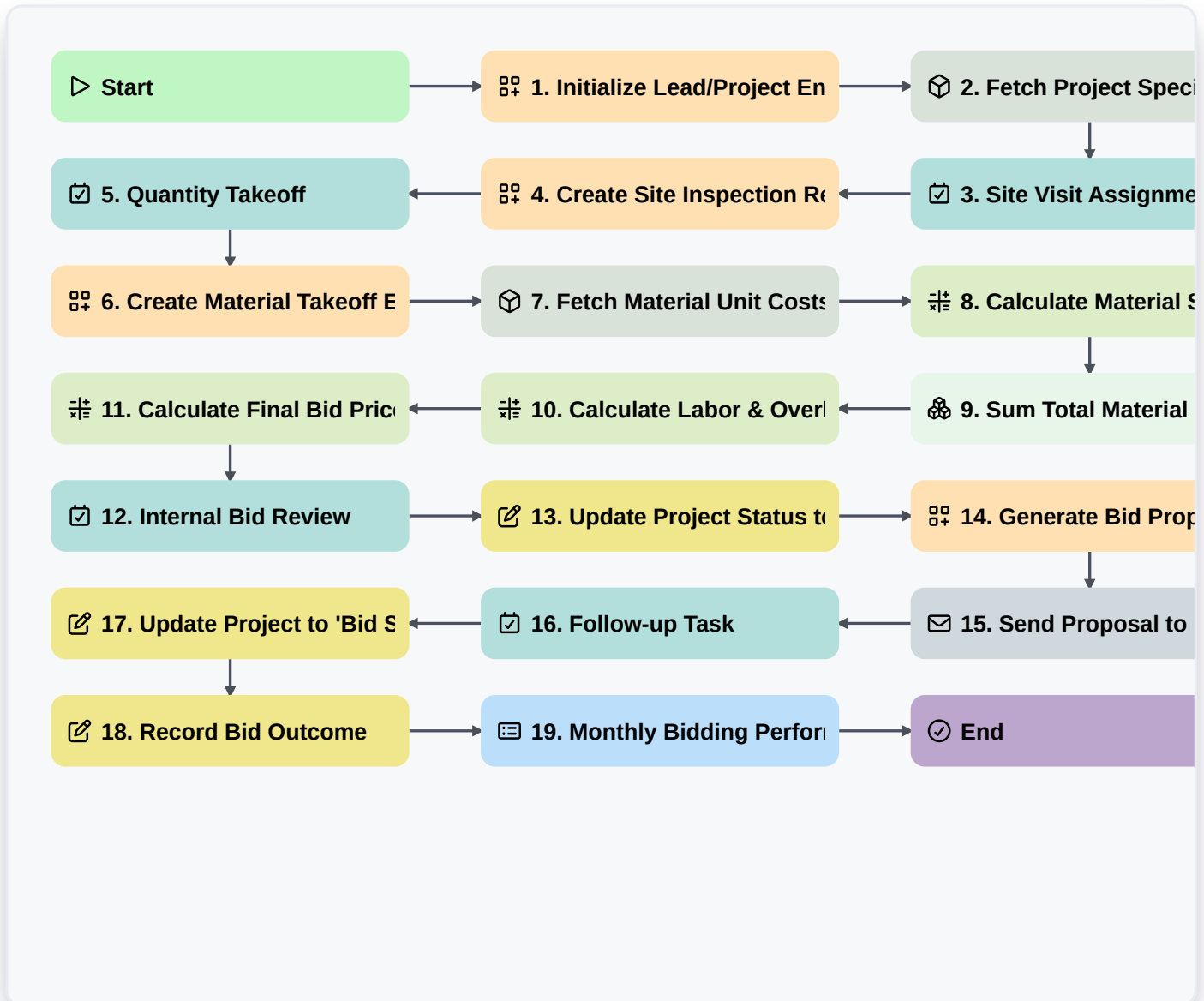


Pre-Construction Estimating And Bidding Workflow



▷ Start

Start of the Workflow/Process.

🗂️ 1. Initialize Lead/Project Entry

Create a new entry in the 'Projects' data model to initiate the estimation process.

📦 2. Fetch Project Specifications

Retrieve blueprint and requirement data from the Project entry to populate estimation parameters.

📅 3. Site Visit Assignment

Create a task for the Field Engineer to perform a physical site inspection.

🗂️ 4. Create Site Inspection Report

Generate a new entry in the 'Site Inspection' data model linked to the Project.

📅 5. Quantity Takeoff

Assign a task to the Estimator to measure and count materials from the digital blueprints.



6. Create Material Takeoff Entry

Create a line-item entry in the 'Material Takeoff' data model for each identified material.

7. Fetch Material Unit Costs

Retrieve current pricing from the 'Vendor Price List' data model.

8. Calculate Material Subtotal

Multiply Quantity (from Takeoff) by Unit Cost (from Price List) to get the subtotal per item.

9. Sum Total Material Costs

Aggregate all material subtotal entries to calculate the total direct material cost.

10. Calculate Labor & Overhead

Apply labor multiplier and overhead percentage to the total material cost.

11. Calculate Final Bid Price

Sum Material Costs, Labor, and Overhead, then add the desired profit margin.

12. Internal Bid Review

Create a task for the Pre-Construction Manager to review the calculated estimate for accuracy.

13. Update Project Status to 'Review'

Update the Project entry status field to indicate the estimate is ready for review.

14. Generate Bid Proposal

Create a formal 'Proposal' entry containing the final numbers and terms.

15. Send Proposal to Client

Send the finalized proposal and documentation to the client's email address.

16. Follow-up Task

Create a follow-up task for the Sales Rep to contact the client 3 days after proposal submission.

17. Update Project to 'Bid Submitted'

Update the Project entry to reflect that the bid is officially out for tender.

18. Record Bid Outcome

Update the Project entry with 'Won' or 'Lost' status based on client feedback.

19. Monthly Bidding Performance Report

Generate a report summarizing Win/Loss ratios and total bid volume for the month.

End

End of the Workflow/Process.