Bid Comparison & Quote Promotion

Deep Space · Preconstruction · Bid Package Management — Knowledge Base Guide

This guide covers how estimators compare subcontractor pricing in Deep Space Bid Package Management: the side-by-side **Comparison matrix**, **quotes read by KAI** standing directly in the comparison, **promoting a quote to a bid** so the full levelling-to-award chain applies to it, the unified **Record bid on behalf** entry, and how **adjustments** and the **recommendation** flow fit together.

1 · Two kinds of price: quotes vs bids

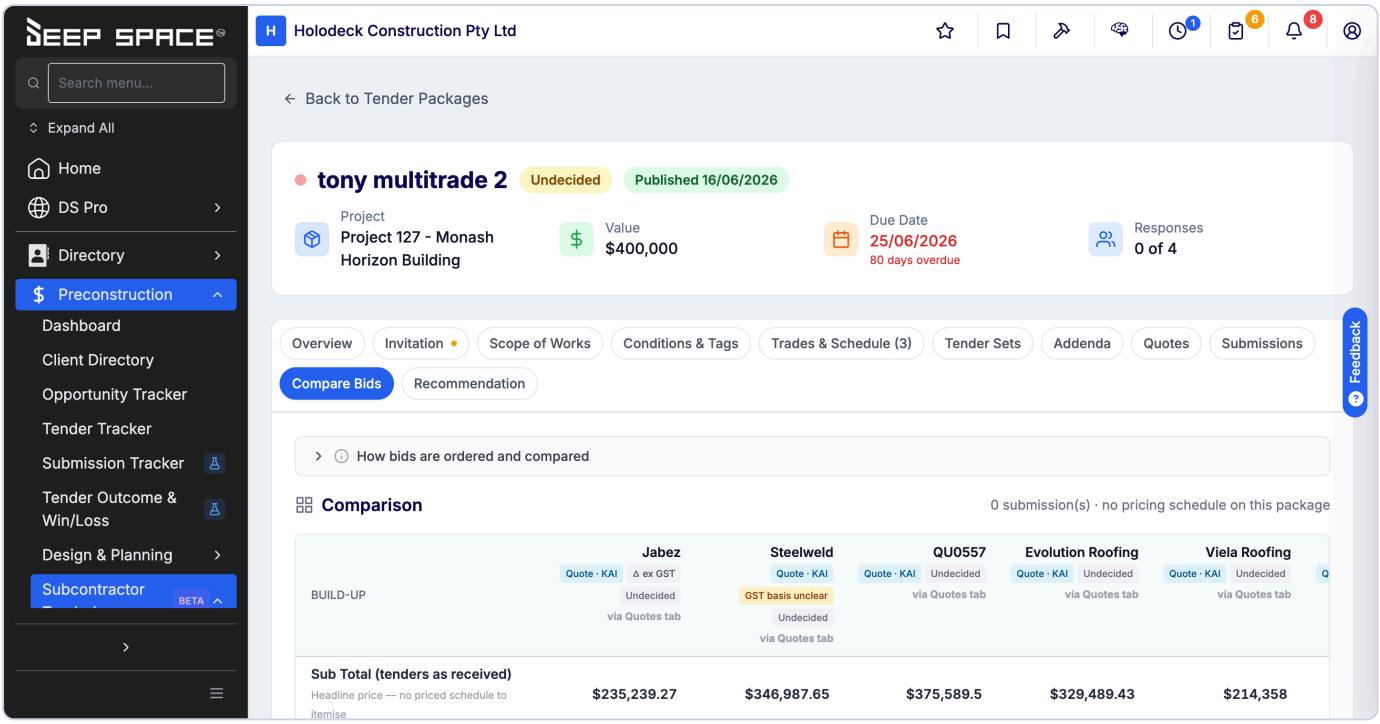
Everything on the Compare Bids tab is one of two things, and the distinction drives what you can do with it:

	Quote	**Bid (submission)**
What it is	A subcontractor's PDF, dropped on the Quotes tab or received by email. KAI reads the total, GST basis, inclusions and exclusions.	A formal tender response — submitted through the portal by the subcontractor, or recorded/vouched by the builder.
Shows in the comparison?	Yes — as a column labelled `Quote · KAI`.	Yes — as a full bid column.
Can it be adjusted, recommended, awarded?	**No.** The downstream chain (adjustments, recommendation, approval, award) only operates on bids.	**Yes** — the whole chain applies.
How to convert	**Promote to bid** — one click; see section 4.	

> A quote is *evidence of a price*; a bid is *a price someone stands behind*. Promotion is the estimator confirming KAI's reading and taking ownership of it — the same act as recording an offline bid on behalf of a subcontractor.

2 · The Comparison matrix

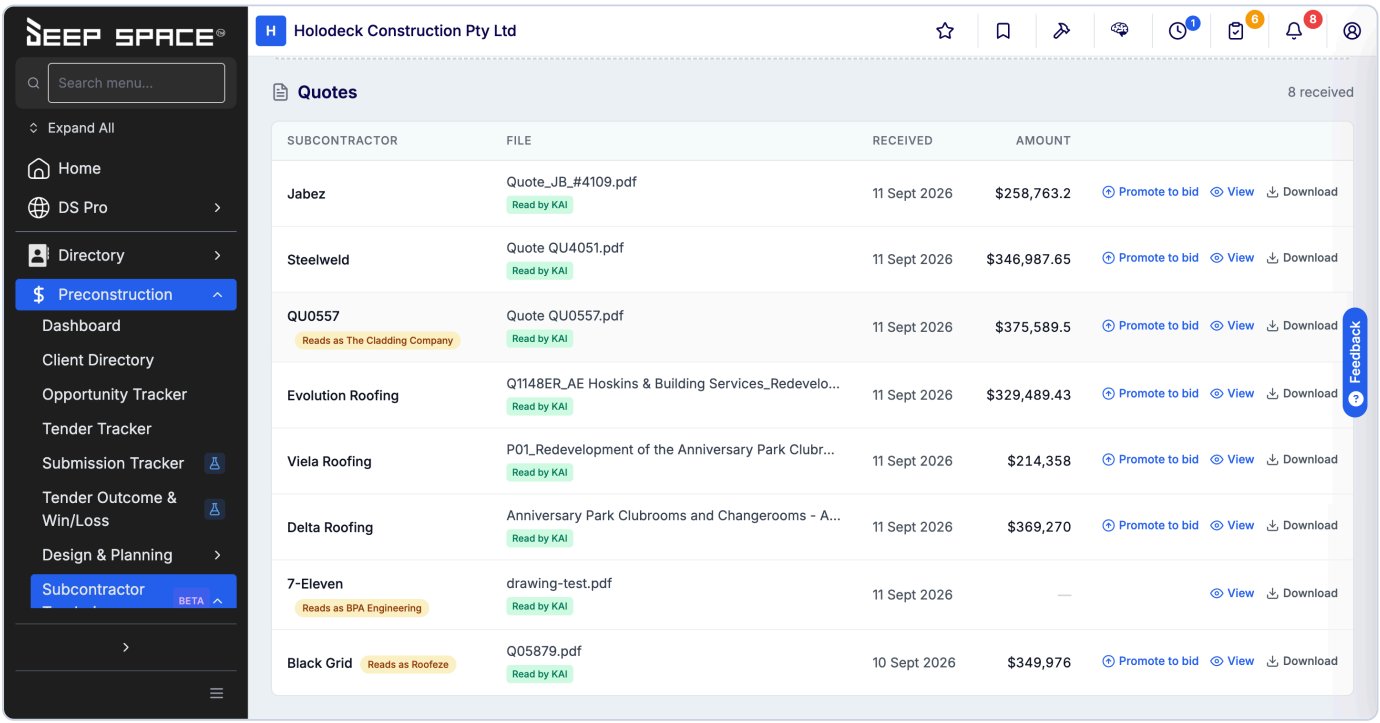
Compare Bids opens with one column per bidder — portal bids, builder-entered bids, and KAI-read quotes side by side. Under the (optional) priced schedule, the **build-up** continues in the same columns: sub total as received, tag deviations, exclusion allowances, comparative value, contingency, and the **Total Comparative Value of Tender** that an award is judged on. The cheapest rankable column carries the **Best** flag.



A package with no portal submissions and seven KAI-read quotes: every quote stands as a column. Chips explain each figure's footing — `△ ex GST` marks a total converted from a GST-inclusive quote; `GST basis unclear` marks a quote that shows its figure but is excluded from the ranking, because a 10% uncertainty in basis is the size of a wrong award decision.

3 · The Quotes tab: intake and KAI reading

Drop subcontractor PDFs on the Quotes tab (several at once is fine) or let them arrive via the project quote address. KAI reads each one in ~30 seconds: total, GST treatment, inclusions/exclusions, and a confidence rating. Every field stays editable — open **View** to check the reading against the source PDF side by side.

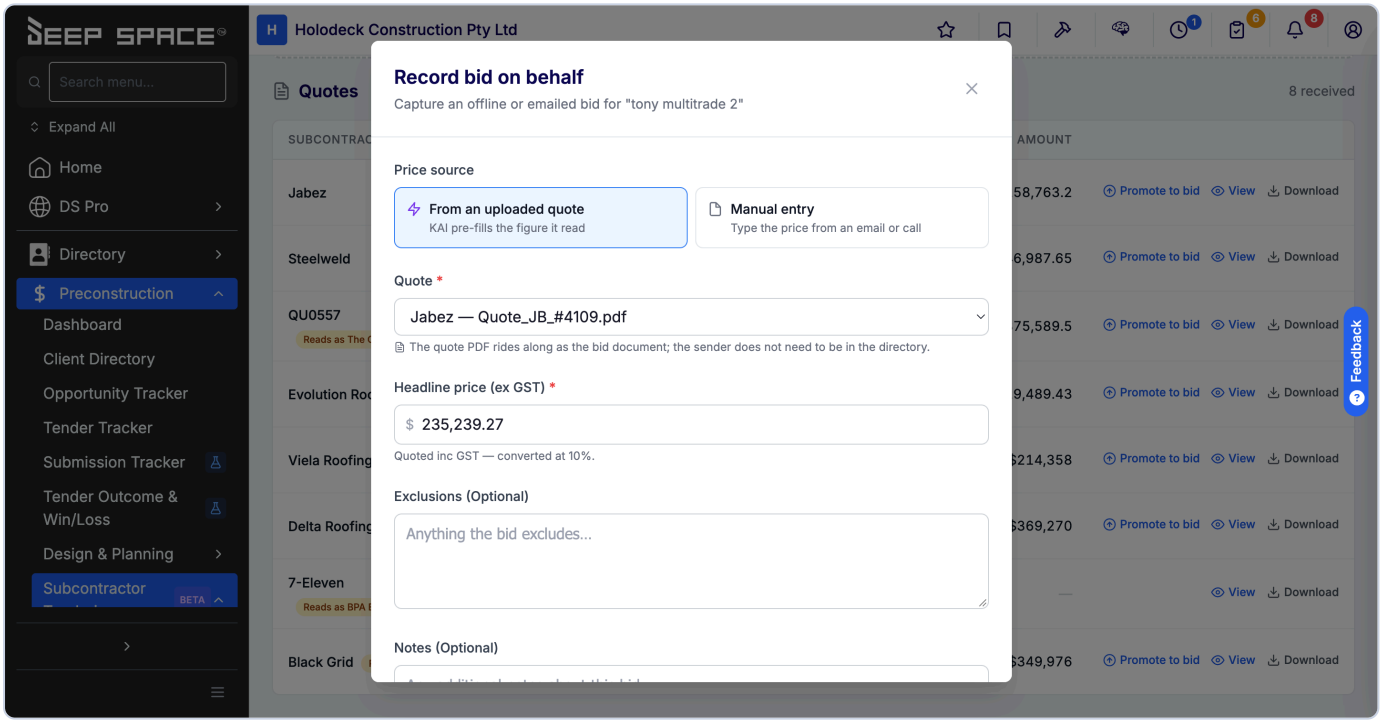


*The quote register. Every live quote with a figure carries **Promote to bid**. Note the two safety chips: "Reads as …" warns when KAI thinks the document came from a different company than it was filed under, and the drawing (`drawing-test.pdf`) gets **no** Promote button — KAI classified it as not-a-quote, so it can never price anything.*

4 · Promote a quote to a bid

Adjustments, recommendation and award all operate on bids. When a package's only prices arrived as PDFs, promote them:

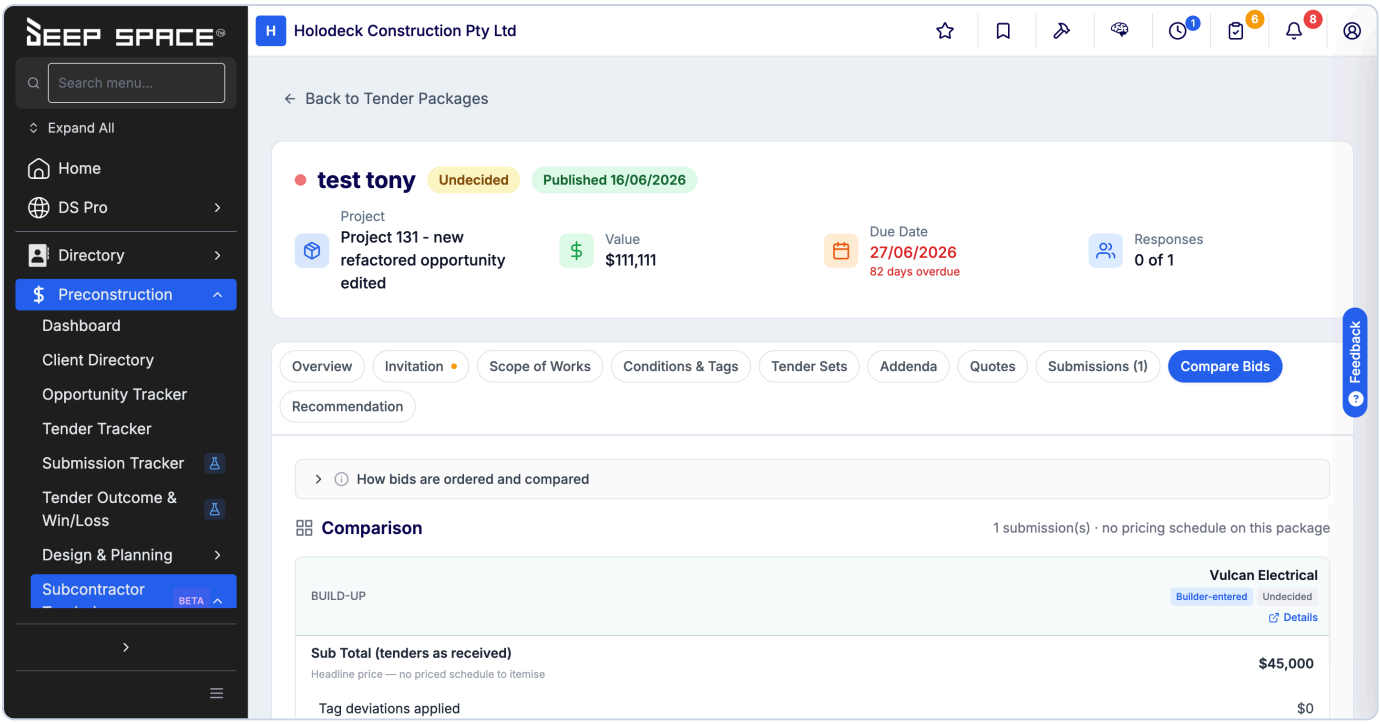
1. On the **Quotes** tab, click **Promote to bid** on the quote.
2. The **Record bid on behalf** dialog opens with the quote pre-selected and the **ex-GST headline pre-filled** from KAI's reading. A GST-inclusive quote is converted automatically at the company rate and labelled ("Quoted inc GST — converted at 10%"); an unclear basis asks you to confirm the figure. Everything stays editable — confirming the number is the point.
3. Optionally add exclusions or notes (what you type wins over what KAI read), review the auto-filled source note, and click **Promote to bid**.



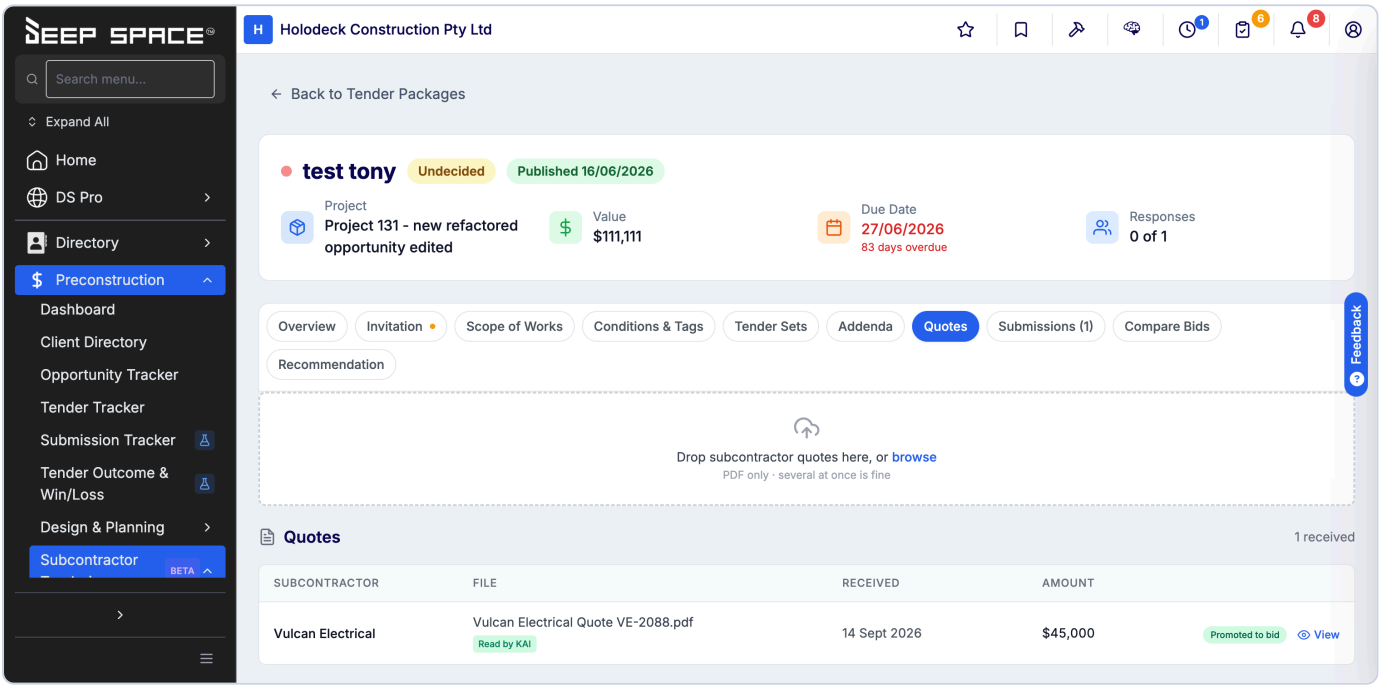
*The promote dialog. Here a $258,763.20 inc-GST reading was converted to $235,239.27 ex GST automatically. The quote PDF rides along as the bid document, and the sender does **not** need to be in the directory.*

What happens after promoting

- The bid appears as a **Builder-entered** submission with full provenance (who promoted it, when, from which file).
- The quote's own column disappears from the comparison — the same money is never levelled against itself. The quote stays on the Quotes tab with a **Promoted to bid** chip as the source record.
- KAI-read exclusions carry into the bid's exclusions; the PDF is attached to the bid.
- Adjustments, scoring, shortlist, recommendation and award all work on it immediately.



*After promotion: the former `Quote · KAI` column is now a **Builder-entered** bid, the Submissions tab counts it, and the full evaluation toolkit applies.*



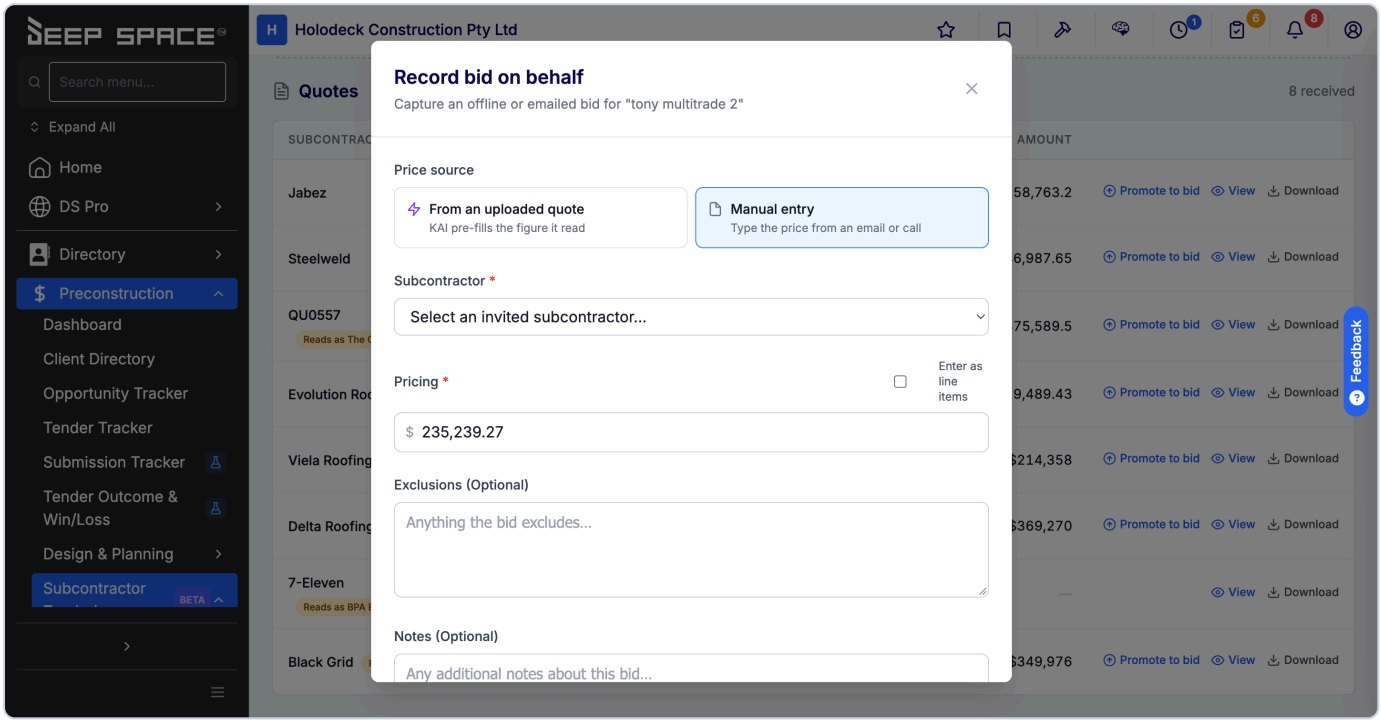
*On the Quotes tab the promoted quote keeps its place as the source record, marked **Promoted to bid** — it can never be promoted twice.*

5 · Record bid on behalf — one dialog, two price sources

The same dialog also captures bids that never came in as a PDF quote. **Price source** chooses the path:

- **From an uploaded quote** — the promote flow above.

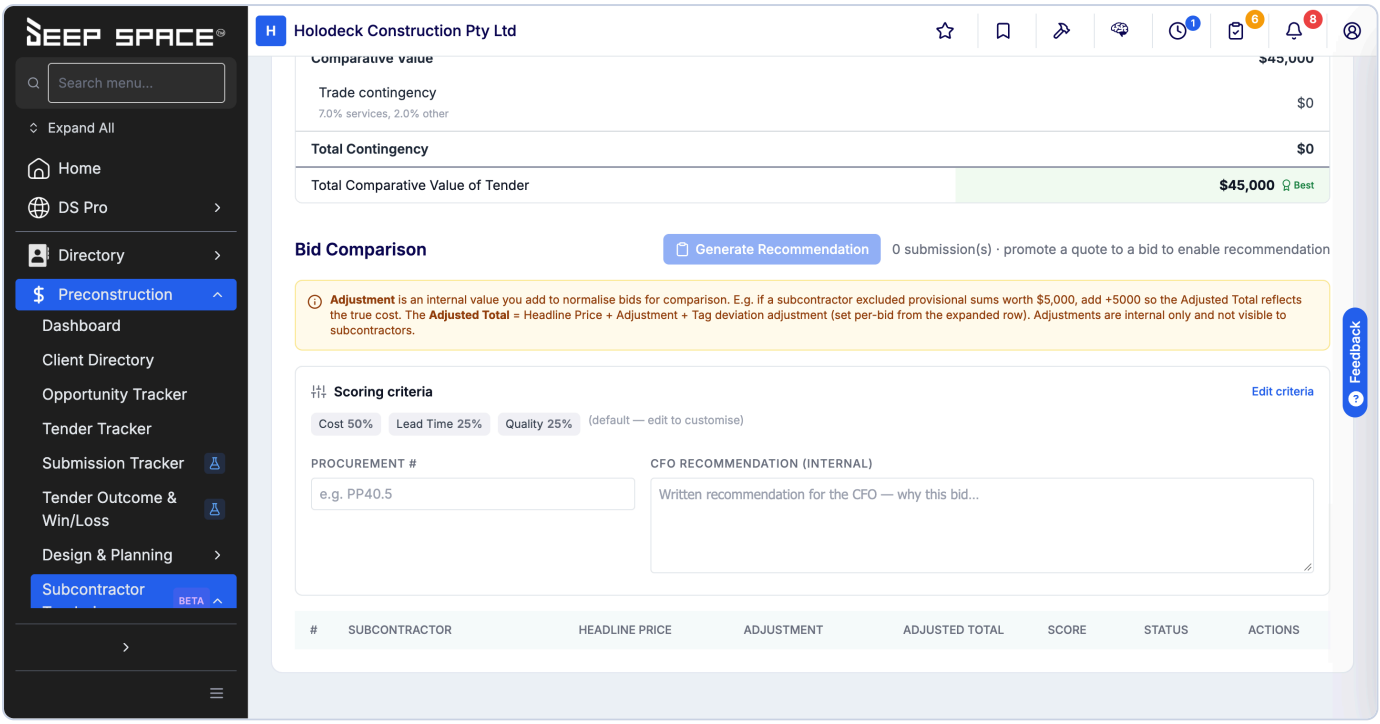
- **Manual entry** — pick an invited subcontractor and type the price (headline or line items), for bids received by phone or in an email with no usable document. A source note is required for provenance. If you attach the bid PDF, Deep Space also stores it as a quote linked to the bid, so the source document is never lost.



Manual entry keeps the original Record-bid-on-behalf flow: invited subcontractor, price or line items, exclusions, notes and a required source note.

6 · Recommendation gating

A tender recommendation is built from bids. On a package with quotes but no bids yet, **Generate Recommendation** is disabled with an inline hint, instead of failing with an error:

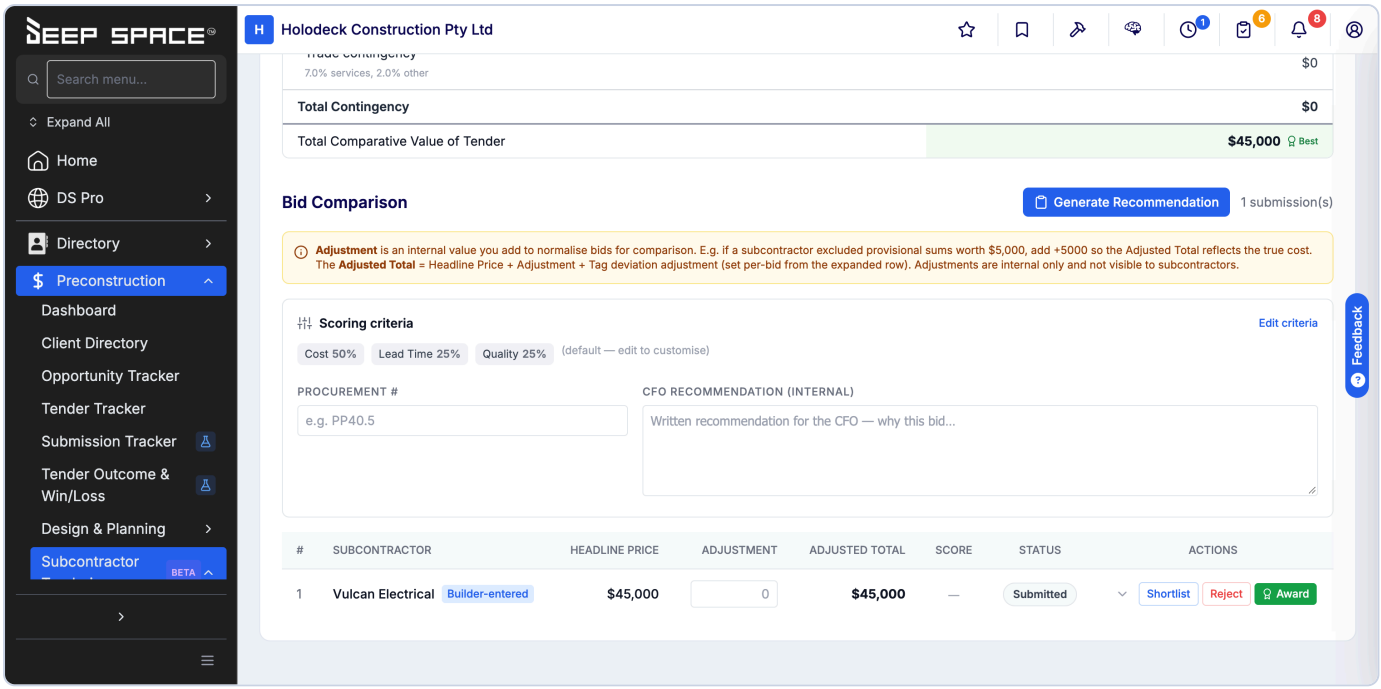


“0 submission(s) · promote a quote to a bid to enable recommendation.” Once at least one bid exists, the button enables and snapshots the current comparison into the Recommendation tab.

7 · Adjustments

An **Adjustment** is an internal value you add to normalise bids for comparison — e.g. a bidder excluded provisional sums worth $5,000, so you add +5,000 and their **Adjusted Total** reflects the true cost. Adjustments are internal-only and never visible to subcontractors.

- Edit a bid's adjustment in the **Bid Comparison** table (the Adjustment column / expanded row).
- Adjusted Total = Headline Price + Adjustment + Tag deviation adjustment.
- Quotes cannot carry adjustments — promote first. This is the most common reason an “Adjustment row” appears missing on a quote-only package.



*A promoted bid in the Bid Comparison table: editable **Adjustment**, Adjusted Total, scoring, and the Shortlist / Reject / Award actions — plus **Generate Recommendation** now enabled with one bid on the package.*

8 · Rules & edge cases

Situation	Behaviour
GST-inclusive quote	Converted to ex GST at the company rate and labelled `△ ex GST`. All comparison figures are ex GST.
Quote with unstated GST basis	Shows its figure, excluded from “Best” ranking, promotion asks you to confirm the ex-GST figure.
File KAI classified as not-a-quote (drawing, capability statement)	Stays on the package as an attachment; no amount, no comparison column, no promote.
Quote already promoted	Shows a “Promoted to bid” chip; cannot be promoted twice. If a promoted bid is ever removed, the quote column returns — money never disappears.
Subcontractor already has a submitted bid	Promotion is refused (409) — one live bid per subcontractor.
Package closed for submissions	Promotion still works on open *and* closed packages, like recording an offline bid — the builder vouches for when it arrived.
Sender not in the directory	Fine. A quote's sender needs no directory entry; the promoted bid records the company name as filed.

9 · Release history

Date	Ticket	What shipped

2026-09-10	PRE-348	Compare Bids rebuilt as a side-by-side matrix with in-column build-up rows.
2026-09-11	PRE-415	KAI-read quotes stand as comparison columns, with GST normalisation and ranking guards.
2026-09-13	PRE-420	Promote quote → bid (endpoint + comparison dedupe); recommendation disabled with a hint instead of a guaranteed error on quote-only packages.
2026-09-13	PRE-421	Unified Record-bid-on-behalf dialog (quote source or manual); a manual bid's PDF is stored as a linked quote.

The full flow was verified end-to-end in production on 2026-09-17 (promotion, dedupe, recommendation enablement, adjustment editing, and the Firestore linkage between quote and bid).
