

Standard Operating Procedure

How to Save a “Bids Due Today” Filter on the Scheduling View

Steps

Step 1 Open the Schedule

From the left-hand navigation menu, click Scheduling.

Step 2 Remove any existing filters

Clear any filters currently applied to the calendar before starting, so the new view is built from a clean slate.

Step 3 Create a new view

Along the top of the calendar, click + New view.

Step 4 Name and save the view

Name the view something identifiable to your department, e.g. “[Department] - Bids” (for example, “360 - Bids”), then click Save. Or, “Your Name – Bids”.

Step 5 Filter by department tag (or Project Manager)

Click Filters → Tags, then select only your department’s tag. Click Apply. Or if you only want to see your bids (as an estimator), instead of tags you would select your name from “Project Manager” since those are the bids assigned to you.

Step 6 Filter by calendar event type

Click Filters again → Calendar Event, then deselect everything except Bids. (Tasks can be left selected as well if you also want to see tasks due that day — optional.) Click Apply.

Step 7 Adjust display settings

Click the gear icon in the top right corner and:

- Toggle ON “Expand Events” (if not already on)
- Toggle OFF “Display Days Off”

Step 8 Switch to Month view

Make sure you’re on Month view. Once the filter is saved, you can freely toggle to Week view as needed — the saved filters and settings will carry over.

Step 9 Save the view

Next to the new view name, click Save Changes to lock in all the filter and display settings under that view.

Note: As of now, this view shows all bids due that day — sent, not yet sent, closed, and active alike. We're working on a process change to filter this down to only bids that haven't been sent yet. In the meantime, click into any bid to see where it stands in the process; from there, use "View Job" to open it directly.

Scheduling

CalendarTeam160 schedule160 - teamBid View - 150Bid View - 160Bid View - 360New view

MonthWeekToday<>July 2026

Calendar event is Bid xTag is 360 x

MON	TUE	WED	THU	FRI
29 ⌕ Bid for Morgan Heights HOA - Fence Repair - C ⌕ Bid for Shady Grove Owners Association - Dog...	30	01 ⌕ Bid for Fieldstone Collection II HOA - WO XN6...	02 ⌕ Bid for Aurora Park HOA - WO #2026-212-000... ⌕ Bid for Peppertree Park - Guard House Repairs...	03
06 ⌕ Bid for Horizon Place - Tot Lot Sealing C ⌕ Bid for Seville & Valencia Community Assn - B... ⌕ Bid for Shady Grove Owners Assn - Pressure ...	07	08 ⌕ Bid for Cottonwood Canyon Hills CA - WO 107... ⌕ Bid for McKenna Park HOA - Barbeque Repairs... ⌕ Bid for Pacific Avenue Inc. - Playground Repair... ⌕ Bid for Prado at Eastvale - Light Installation - C ⌕ Bid for Rockport Ranch Community Assn - Fire... ⌕ Bid for Santiago HOA - Shed Roof Repairs C ⌕ Bid for Santiago HOA - Trip Hazards C	09 ⌕ Bid for Emerald Park - 2838 E. Brut Privado #1... ⌕ Bid for Morgan Heights HOA - Monument Mois...	10 ⌕ Bid for Hilltop at Village Oaks HOA - Fence Rep...
13 ⌕ Bid for Alden Village - Trip Hazards C	14 ⌕ Bid for Rocky Point Terrace Assn - Bollard Inst... ⌕ Bid for Sunnymead Ranch PCA - Wrought Iron ...	15 ⌕ Bid for Estrella Condominium Assn - Barbeque ... ⌕ Bid for Shady Trails Community Assn - Stairs L...	16 ⌕ Bid for Nuvo Parkside Community Assn - Dum...	17
20 ⌕ Bid for Alegre & Aldea at Paseo Del Sol - Stucc... ⌕ Bid for Summerwind Trails East - Temporary F...	21	22 ⌕ Bid for Gateway Community Assn - Playground... ⌕ Bid for Park Place Collection - Monument Insta... ⌕ Bid for Rockport Ranch Community Assn - Sig...	23 ⌕ Bid for Calabria Owners Assn - Playground Re... ⌕ Bid for East Highlands Ranch Master HOA - Rai... ⌕ Bid for Oak Valley I Community - Block Wall Re...	24 ⌕ Bid for Loring Ranch - Various Projects C ⌕ Bid for Shady Lane at Loma Linda HOA - WO 9...
27 ⌕ Bid for Agave Neighborhood Assn - WO 13555...	28	29 ⌕ Bid for Cottages on 4th Community - WO 9892... ⌕ Bid for Crown Villas Owners' Assn - WO XN70... ⌕ Bid for Mission Square Community - Tot Lot Su... ⌕ Bid for Shady Trails Community Assn - Basket...	30 ⌕ Bid for Pacific Avenue Inc. - Climber Removal - ...	31 ⌕ Bid for Sommers Bend AA Planning Area Assn ...

Scheduling

CalendarTeamBid View - 360CancelSave changesNew view

MonthWeekToday<>July 2026

Calendar event is Bid +1 xTag is 360 x

MON	TUE	WED	THU	FRI
⌕ T&M: Ready to Schedule R2926547 ⌕ T&M: Ready to Schedule R2927761	⌕ T&M: Ready to Schedule R2923807 ⌕ T&M: Ready to Schedule R2930210			
06 ⌕ Bid for Horizon Place - Tot Lot Sealing C ⌕ Bid for Seville & Valencia Community Assn - B... ⌕ Bid for Shady Grove Owners Assn - Pressure ... ⌕ T&M: Ready to Schedule R2938955	07	08 ⌕ Bid for Cottonwood Canyon Hills CA - WO 107... ⌕ Bid for McKenna Park HOA - Barbeque Repair... ⌕ Bid for Pacific Avenue Inc. - Playground Repai... ⌕ Bid for Prado at Eastvale - Light Installation - C ⌕ Bid for Rockport Ranch Community Assn - Fir... ⌕ Bid for Santiago HOA - Shed Roof Repairs C ⌕ Bid for Santiago HOA - Trip Hazards C ⌕ Need to Complete Estimate [R2920051] ⌕ Need to Complete Estimate R2917641 ⌕ Need to Complete Estimate R2937531 ⌕ T&M: Ready to Schedule R2943642	09 ⌕ Bid for Emerald Park - 2838 E. Brut Privado #1... ⌕ Bid for Morgan Heights HOA - Monument Moi... ⌕ Proposal Follow Up [R2827456] ⌕ T&M: Ready to Schedule R2946502 ⌕ T&M: Ready to Schedule R2946532 ⌕ T&M: Ready to Schedule R2946957	10 ⌕ Bid for Hilltop at Village Oaks HOA - Fence Re...
13 ⌕ Bid for Alden Village - Trip Hazards C ⌕ T&M: Ready to Schedule R2950990 ⌕ T&M: Ready to Schedule R2951040 ⌕ T&M: Ready to Schedule R2952588 ⌕ T&M: Ready to Schedule R2952684	14 ⌕ Bid for Rocky Point Terrace Assn - Bollard Inst... ⌕ Bid for Sunnymead Ranch PCA - Wrought Iron... ⌕ T&M: Ready to Schedule R2954162 ⌕ T&M: Ready to Schedule R2954347	15 ⌕ Bid for Estrella Condominium Assn - Barbeque... ⌕ Bid for Shady Trails Community Assn - Stairs L... ⌕ T&M: Ready to Schedule R2956606 ⌕ T&M: Ready to Schedule R2956926 ⌕ T&M: Ready to Schedule R2957017 ⌕ T&M: Ready to Schedule R2957605	16 ⌕ Bid for Nuvo Parkside Community Assn - Dum... ⌕ T&M: Ready to Schedule R2960393 ⌕ T&M: Ready to Schedule R2960930	17 ⌕ Proposal Follow Up [R2912258] ⌕ T&M: Ready to Schedule R2962731 ⌕ T&M: Ready to Schedule R2962759 ⌕ T&M: Ready to Schedule R2963059
20 ⌕ Bid for Alegre & Aldea at Paseo Del Sol - Stuc... ⌕ Bid for Summerwind Trails East - Temporary F... ⌕ Need to Complete Estimate R2938478 ⌕ T&M: Ready to Schedule R2964994 ⌕ T&M: Ready to Schedule R2965064 ⌕ T&M: Ready to Schedule R2965146 ⌕ T&M: Ready to Schedule R2966096	21	22 ⌕ Bid for Gateway Community Assn - Playgroun... ⌕ Bid for Park Place Collection - Monument Inst... ⌕ Bid for Rockport Ranch Community Assn - Sig... ⌕ Need to Complete Estimate R2944196 ⌕ Need to Complete Estimate R2945959 ⌕ T&M: Ready to Schedule R2970852 ⌕ T&M: Ready to Schedule R2971266	23 ⌕ Bid for Calabria Owners Assn - Playground Re... ⌕ Bid for East Highlands Ranch Master HOA - Ra... ⌕ Bid for Oak Valley I Community - Block Wall R... ⌕ Need to Complete Estimate R2945544 ⌕ Need to Complete Estimate R2947169 ⌕ T&M: Ready to Schedule R2973023	24 ⌕ Bid for Loring Ranch - Various Projects C ⌕ Bid for Shady Lane at Loma Linda HOA - WO 9...
27	28	29	30	31